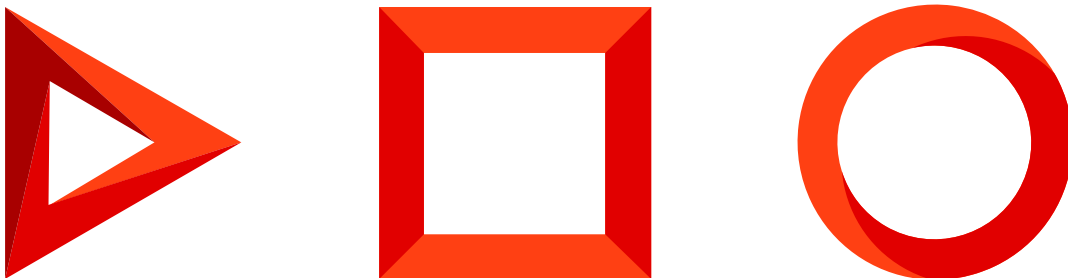


Install Field Sales

Install the “Field Sales for Creatio” app

Version 7.17



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PRODUCTS: SALES ENTERPRISE

The Field Sales for Creatio extension allows automating sales rep tasks. Sales reps use Creatio mobile app in the field to check visit “to-do” list, record the meeting time frame, conduct presentations, monitor SKUs, and place orders.

Product features include:

- Planning of field staff meetings (“visits”)
- Building optimal routes between the meeting locations on the map
- Maintain the visit agenda and guidelines
- Keep a record of the employee’s activities during the visit
- Create custom visit agenda and guidelines.

You need to install the app from the marketplace to access the field functionality. To do so:

1. Open the System Designer, e.g., by clicking .
2. Click [*Installed applications*]. The app management page opens.
3. Click [*Add application*] > [*Choose from Marketplace*].
4. Install the “Field Sales for Creatio” app.

If your Creatio application is deployed on-site, make sure that the application is not restricted from accessing the Internet, before you attempt to install “Field Module for Creatio.” To do so:

1. Grant access to the web site <http://package-store.creatio.com/>.
2. Install the “Field Module for Creatio” app using the following link: <https://marketplace.creatio.com/app/field-sales-creatio>.

For more on adding Creatio apps, see the “[Install applications from the Marketplace](#)” article.

ATTENTION. To access the functionality, all sales rep users must be licensed separately.