

Profile completion

Percentage of profile completion

Version 8.0



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Percentage of profile completion	4
Analyze profile data	4
Complete data calculation settings	5

Percentage of profile completion

PRODUCTS: **ALL CREATIO PRODUCTS**

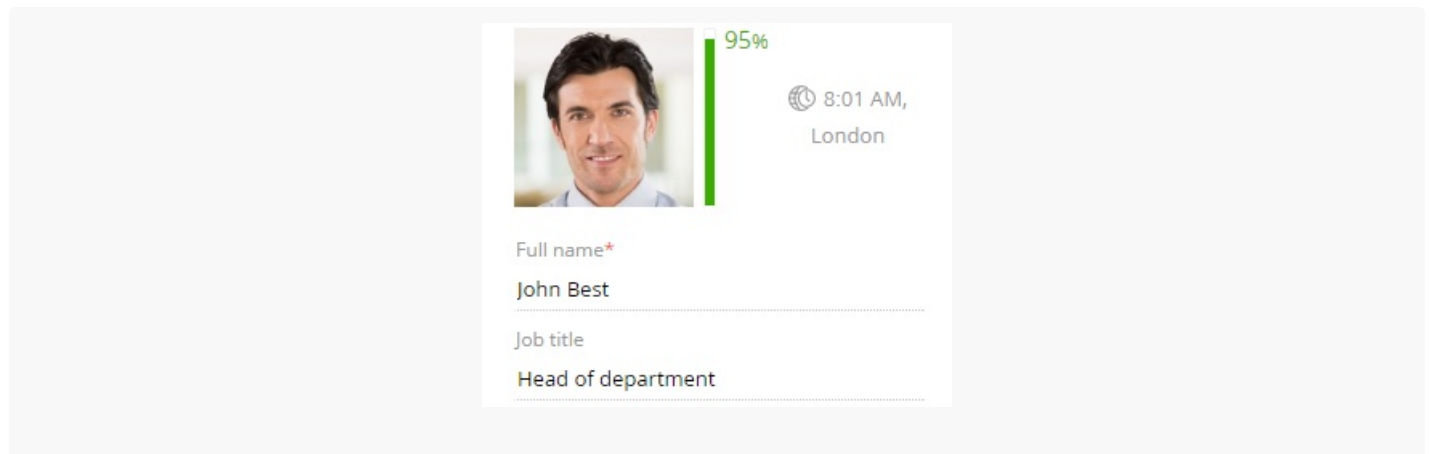
In Creatio, you can monitor the percentage of profile data completeness for contacts and accounts, as well as track process flow using convenient visual tools. Configure how the percentage of data is calculated taking into account the nature of your business. The system will ask you to fill in the missing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



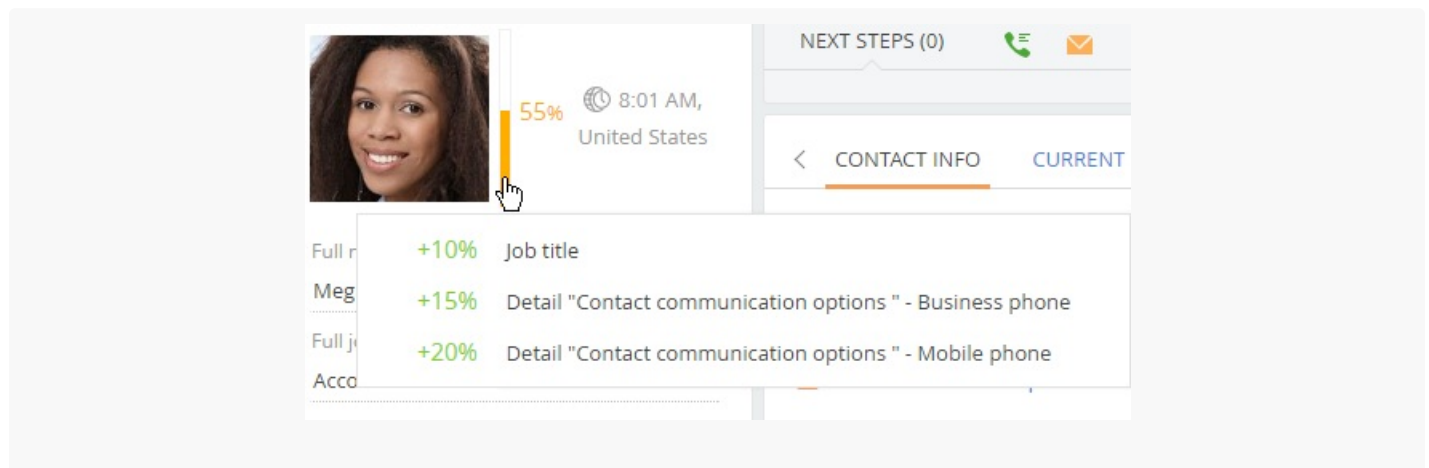
Note. The profile completeness indicator is recalculated upon opening the contact or account page and when saving or changing the recalculation rules in the lookup. To update the percentage in bulk, for example, after [importing data](#) from Excel, run the [*Update the profile data population*] business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

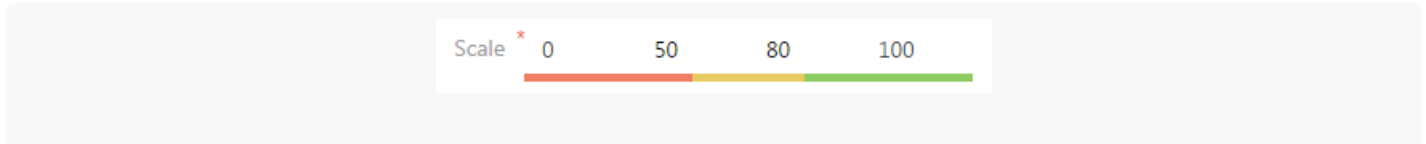
To set up the profile data complete indicator, map the value ranges to incomplete, satisfactory, and complete profile data. To do this:

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.