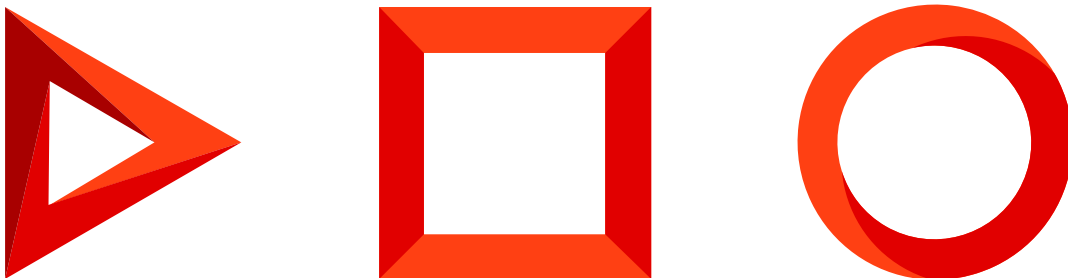


Launch from a record

Set up business process launch from a section record

Version 7.17



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Set up business process launch from a section record

PRODUCTS: ALL CREATIO PRODUCTS

In Creatio, you can run a business process for a specific section record, e.g., a customer onboarding process can be run for a specific account, contact details verification process can be run for a specific contact, etc. Such a process, must be linked to the corresponding record via a process parameter of the “Id” type.

Each record in Creatio has a unique identifier (Id), i.e. a code that uniquely identifies each record in the database. The Id of the needed record can be passed to a process parameter automatically, which in turn will enable you to work with that record as part of the process flow.

Note. More information on identifying records by Id is available in the [Working with data](#) article.

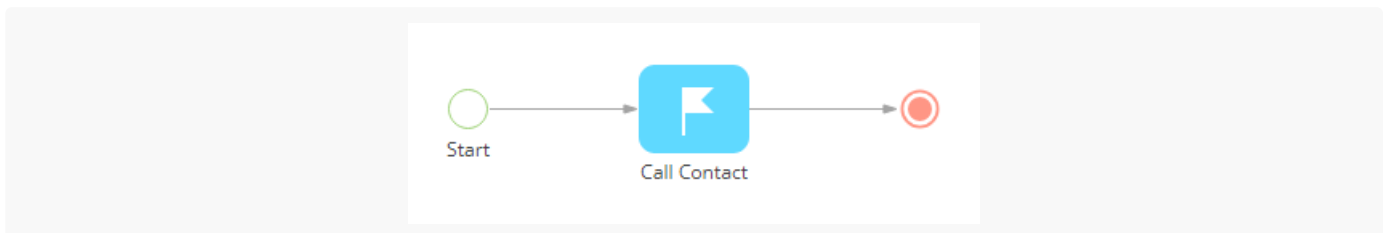
For example, you can create a simple call scheduling business process (“Call a client”) and run it for individual records in the [*Contacts*] section (Fig. 1). The following three steps are required to create a business process:

1. [Create a unique Id parameter.](#)
2. [Map the parameter to process elements.](#)
3. [Add the business process to a section.](#)

When you select a record in the section and run the process, the process parameter value will be populated with the unique identifier of the selected record.

Any element that needs to work with that record can obtain its Id from the process parameter afterwards.

Fig. 1 Simple task scheduling process

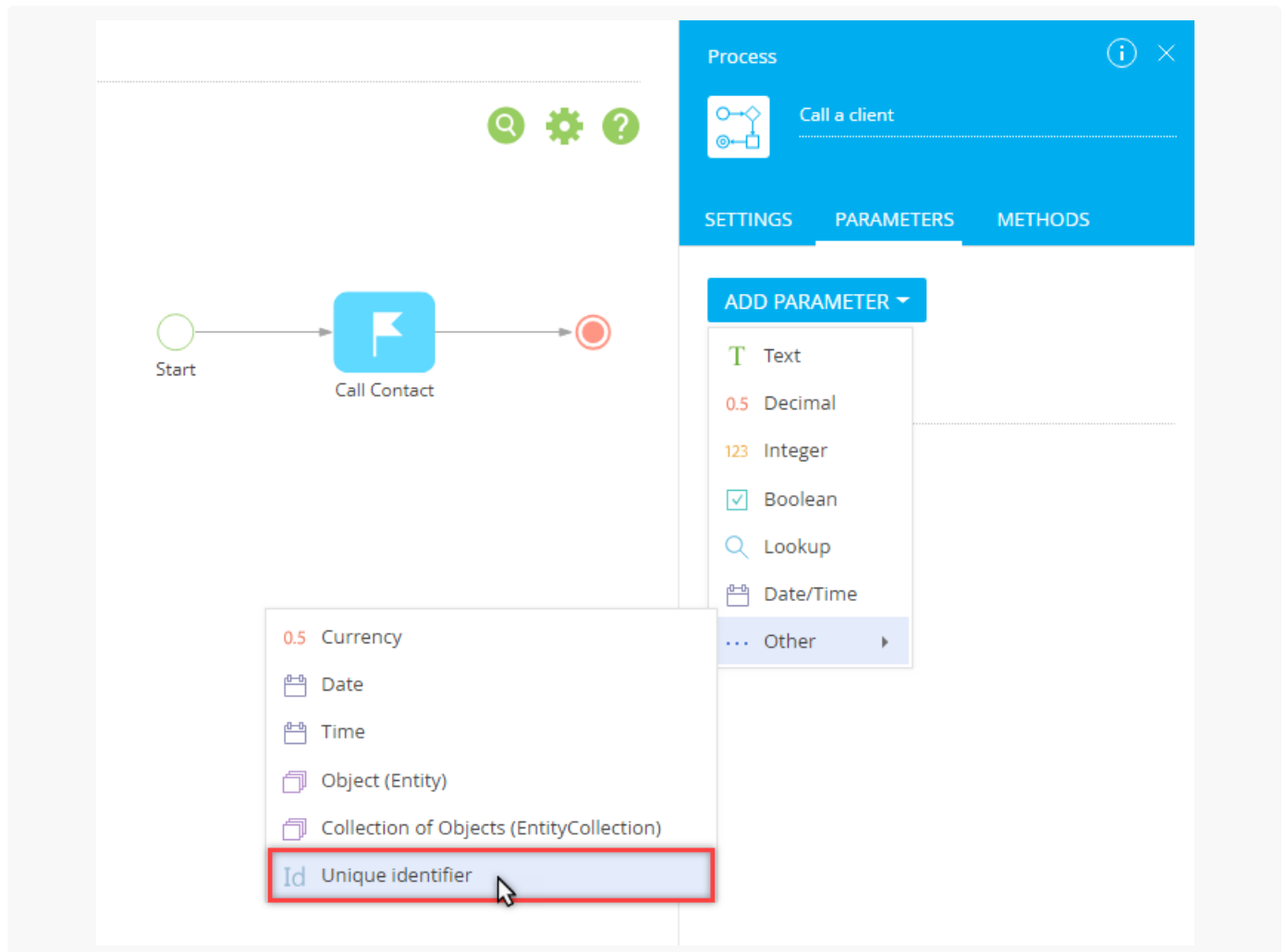


1. Create a unique Id parameter

To create a process parameter that will store the unique Id of a record:

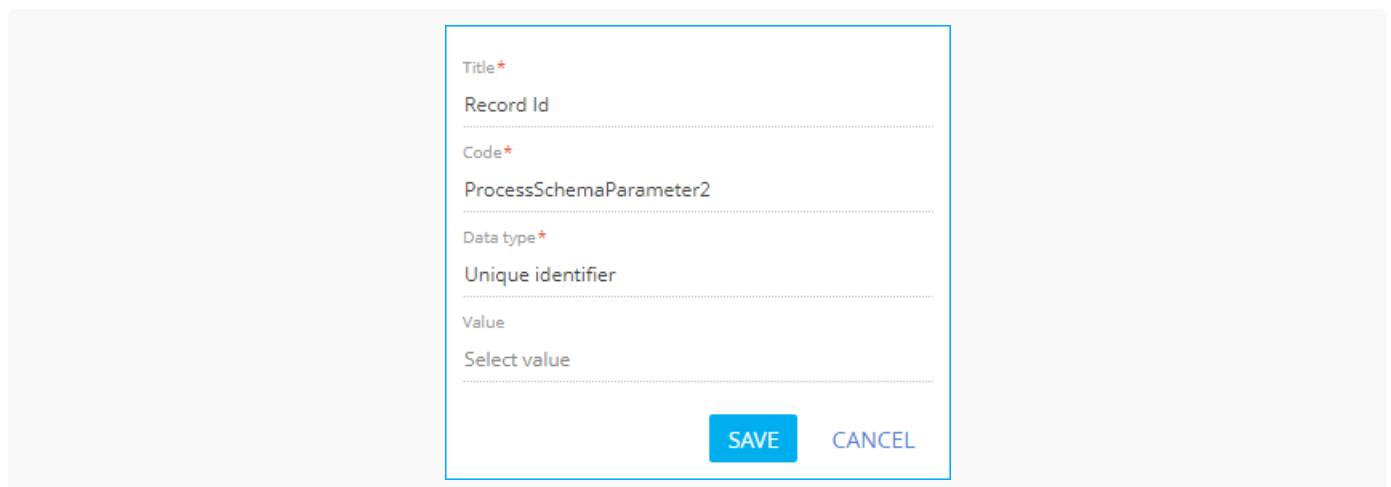
1. Open the sub-process in the Process Designer.
2. In the process setup area, go to the [*Parameters*] tab.
3. Click [*Add parameter*] and select [*Other*] > [*Unique identifier*] (Fig. 2). This parameter will store the Id of the record for each instance of this business process.

Fig. 2 How to add parameters to a process



4. You can change the [*Title*] field to make the parameter more recognizable. The [*Code*] field will be populated automatically (Fig. 3).

Fig. 3 Parameter properties area



5. Click [*Save*] in the parameter properties area.
6. Save the process diagram.

2. Map the parameter to process elements

The new process parameter can now be used to connect the necessary process elements to the section record for which the process was started. For example, you can connect the [*Perform task*] element to the contact record for which the process was run, and automatically populate the [*Contact*] field in the created task.

To specify the element parameters:

1. Select the element on the diagram and make the changes in the element setup area to map an element parameters (Fig. 4):

Fig. 4 [*Perform task*] process element parameters

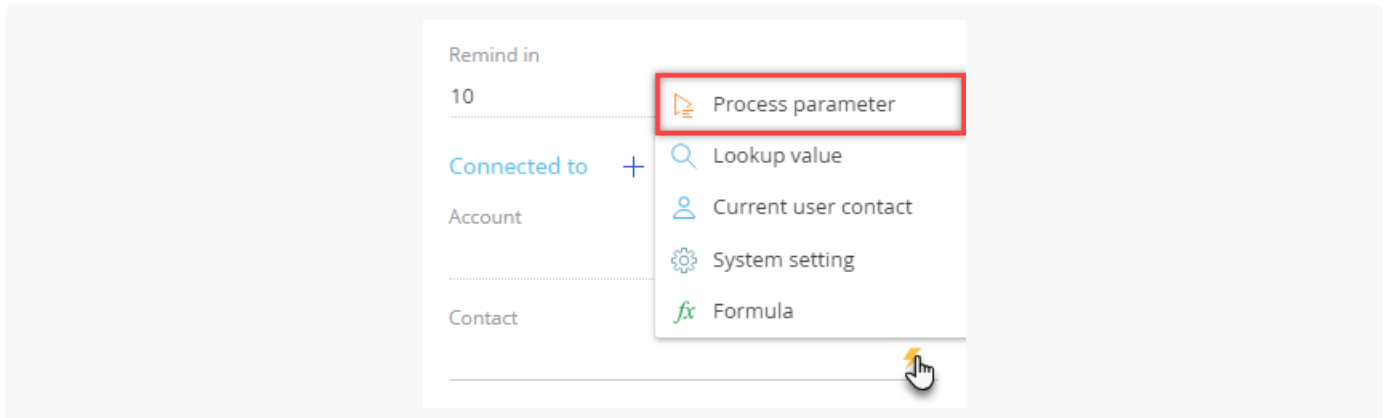
The screenshot shows the configuration window for a 'Perform task' element named 'Call Contact'. The window has a blue header with the title 'Perform task' and a sub-header 'Call Contact'. Below the header, there are several configuration sections:

- What should be done?:**
 - Call Contact
 - Task category*: Call
 - Start in: 1 hours
 - Planned duration: 30 minutes
 - Show in calendar
 - Show page automatically
 - Run following elements in the background
- Who performs the task?:**
 - [#System variable.Current user contact#]
 - Hint for user
- Remind in:** 0 minutes
- Connected to:** A dropdown menu showing 'Contact', which is highlighted with a red border.

2. Click the ⚡ button next to the field of the parameter, which must be mapped to a process parameter and select [*Process parameter*] from the menu (Fig. 5). For example, if the process is run for a contact record,

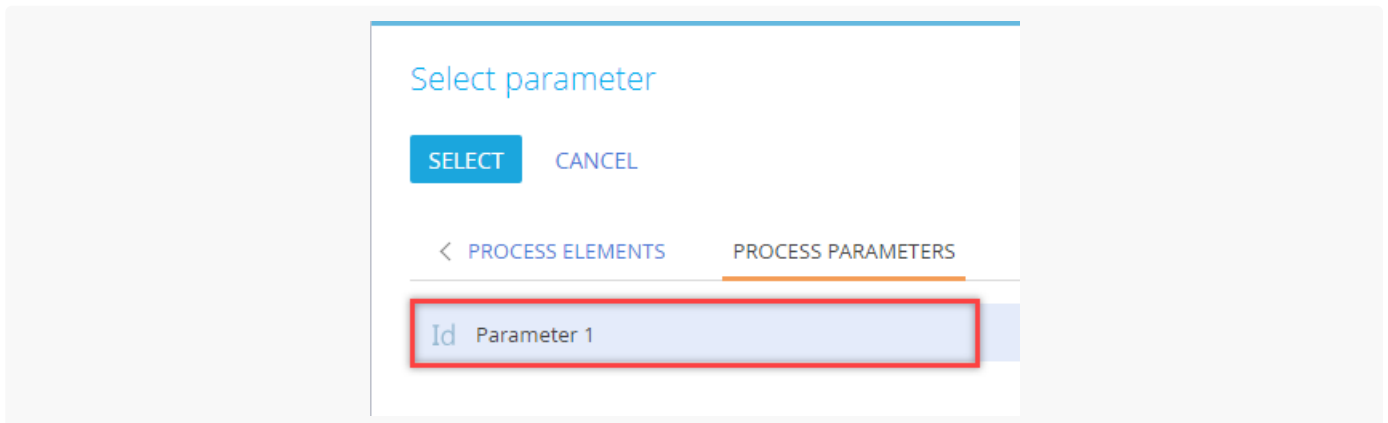
click the [*Contact*] field.

Fig. 5 Opening the parameter selection window



3. In the window that appears, click [*Process elements*].
4. In the list of the process parameters, select the one that stores the needed value (Fig. 6). For example, you can map the [*Contact*] parameter of a [*Perform task*] element to the process parameter that stores the Id of the contact record. As a result, when the process is executed, the [*Contact*] field of the created task will be populated with the contact whose Id was stored in the process parameter.

Fig. 6 Parameter selection window



5. Save the process diagram.

As a result, whenever the process is run, the value of the element parameter will be populated automatically from the corresponding process parameter. For example, the contact in the [*Connected to*] block in the task will be populated from the [*Contact*] parameter of the process.

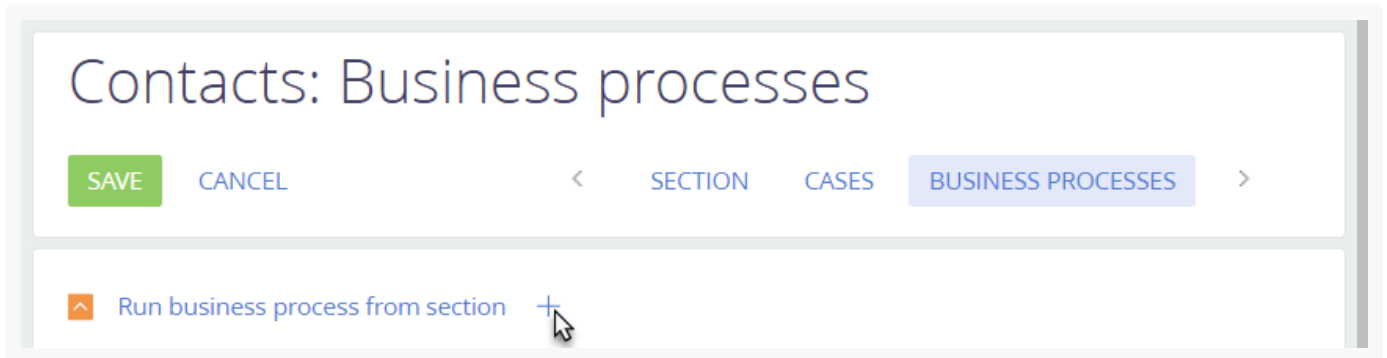
3. Add the business process to a section

You can add business processes to any section using the section wizard. For example, you can add the “Call a client” process to the [*Contacts*] section to be run for specific contacts.

To do this:

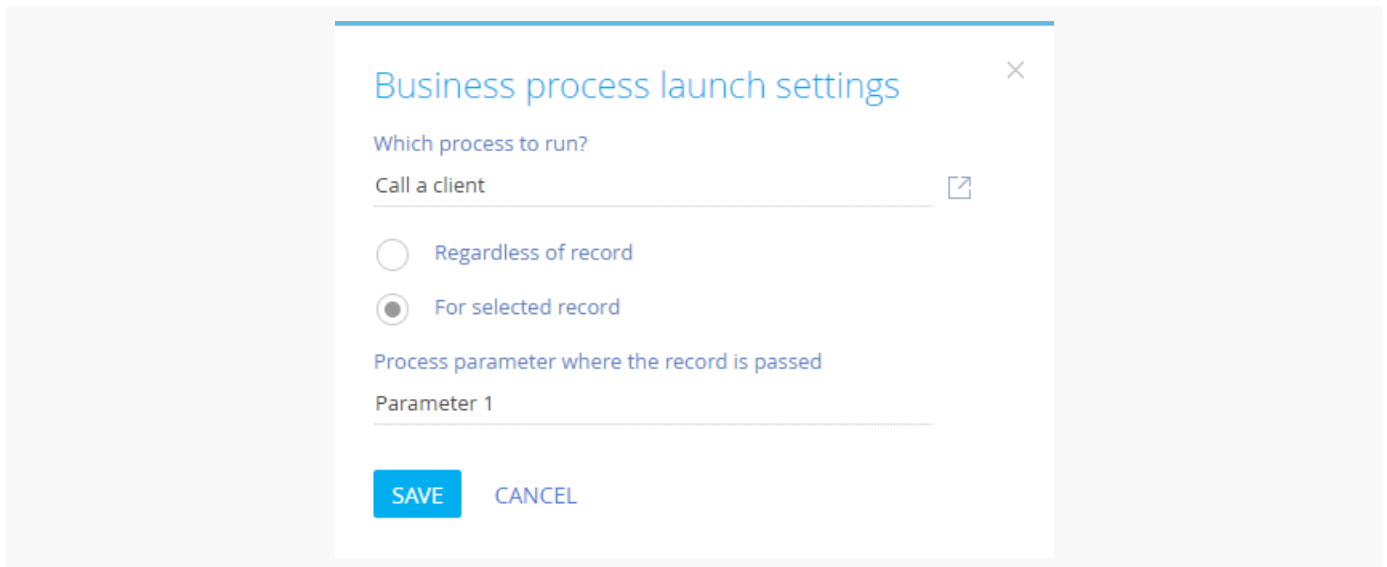
1. Open the needed section and access the section wizard from the [*View*] menu.
2. Open the [*Business processes*] tab, and click the + button next to the [*Run business process from section*] field (Fig. 7).

Fig. 7 Adding the business process to a section



3. In the window that appears, populate the following fields (Fig. 8):

Fig. 8 Business process launch settings

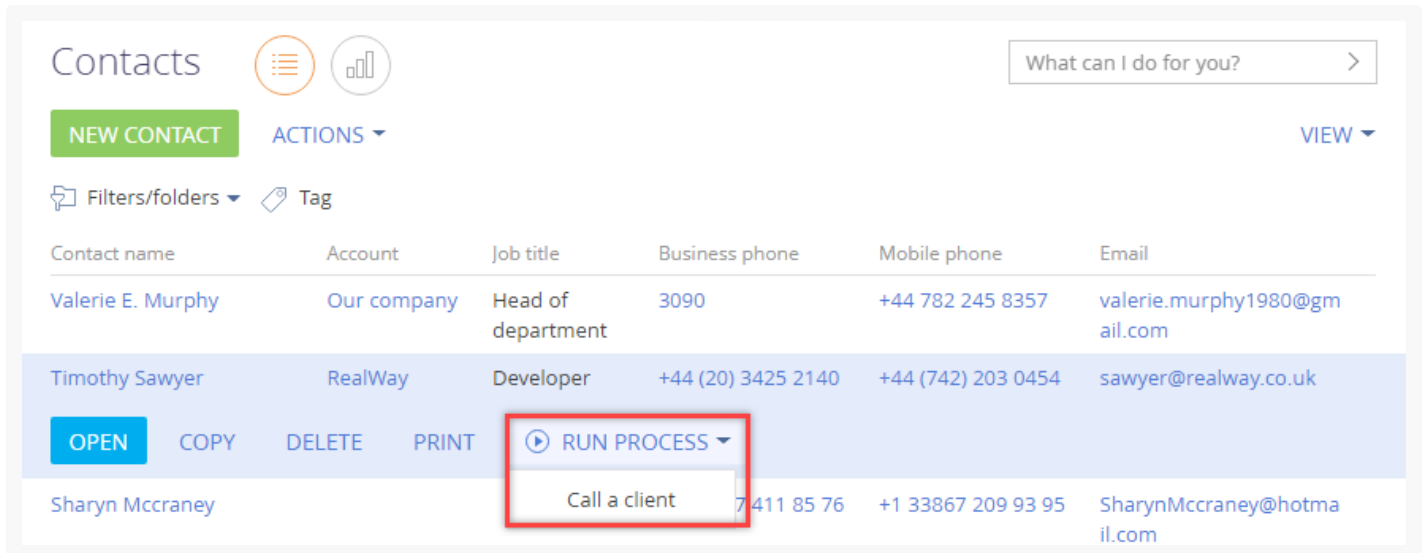


- a. [*Which process to run?*] - select the process to run for section records. For example, you can select the "Call a client" process.
- b. Select the "For selected record" option to run the process for individual records in the section.
- c. In the [*Process parameter where the record is passed*] field, specify the process parameter, that will store the record Id. This must be a parameter of the "Id" type, such as the "Record Id parameter created earlier.

4. Save the changes.

As a result, a new "Run process" button will appear in the section list (Fig. 9) and on record pages of the section. Clicking this button will enable you to run processes for records of this section.

Fig. 9 "Run a process" button



The screenshot shows a CRM interface for 'Contacts'. At the top, there is a search bar with the text 'What can I do for you?' and a 'VIEW' dropdown. Below the search bar are buttons for 'NEW CONTACT' and 'ACTIONS'. There are also 'Filters/folders' and 'Tag' options. The main content is a table of contact records. The table has columns for 'Contact name', 'Account', 'Job title', 'Business phone', 'Mobile phone', and 'Email'. The records are: Valerie E. Murphy (Our company, Head of department, 3090, +44 782 245 8357, valerie.murphy1980@gmail.com), Timothy Sawyer (RealWay, Developer, +44 (20) 3425 2140, +44 (742) 203 0454, sawyer@realway.co.uk), and Sharyn Mccraney (7411 85 76, +1 33867 209 93 95, SharynMccraney@hotmail.com). Below the table, there are buttons for 'OPEN', 'COPY', 'DELETE', 'PRINT', and 'RUN PROCESS'. The 'RUN PROCESS' button is highlighted with a red box, and its dropdown menu is open, showing 'Call a client' as the selected option.

Contact name	Account	Job title	Business phone	Mobile phone	Email
Valerie E. Murphy	Our company	Head of department	3090	+44 782 245 8357	valerie.murphy1980@gmail.com
Timothy Sawyer	RealWay	Developer	+44 (20) 3425 2140	+44 (742) 203 0454	sawyer@realway.co.uk
Sharyn Mccraney			7411 85 76	+1 33867 209 93 95	SharynMccraney@hotmail.com

For example, running the “Call a client” process created in the previous step will automatically create a task in your calendar and connect it to the contact record for which the process was run.