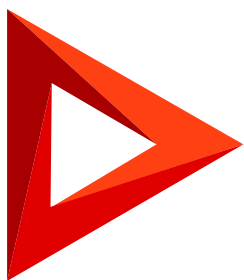


# Glossary

## Glossary

Version 8.0



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# Glossary

## A

### Account (Legal entity)

A company. For example, your customer, partner, contractor, supplier, or competitor. Read more: [Create an account](#).

### Activity

A record in Creatio used to schedule personal tasks and tasks for other employees. Activities include tasks, meetings, and calls. Read more: [Create an activity](#).

### Agent desktop

A contact center tool that allows an agent to process cases in the omnichannel mode, manage incoming and outgoing calls and work with other items in queues. The agent desktop displays all cases the agent must process according to the queue settings. Read more: [General Agent Desktop settings](#).

### API

Application Programming Interface. A description of the methods a program can use to interface with another program. API is typically included in the description of an Internet protocol, a framework, or an operating system function call standard. Creatio enables a wide range of methods for integration with third-party software products. Choosing the method of integration depends on the client's needs, the type and architecture of third-party software products, and the developer's skills. Read more: [Integrations and API](#).

### Architecture

Structural elements of the application that make up the system, as well as the connections between them. The main Creatio application's architecture scheme includes an application server, a caching server, a database server, and, optionally, a version control server. Read more: [Architecture](#).

### Artificial intelligence (AI)

Software's ability to solve cognitive tasks normally associated with human intelligence, such as learning, problem solving, and pattern recognition. Read more: [AI tools](#).

### Audience (Email)

A recipient list created based on contacts, accounts, leads, event participants, etc. Use the [ *Audience* ] tab on a bulk email page to add a recipient list to an email. The email audience is populated differently depending on the email type. Read more: [Create a bulk email](#) and [Create a trigger email](#).

## Audit log

A Creatio section that logs events like modification of user roles, distribution of access permissions, change of system setting values, and user authorization in the system. Read more: [Audit log](#).

## B

### Back-end (server-side)

The hardware and software part of the service (work with databases, data processing, etc.) that comes without a UI. Read more: [Back-end development](#) and [Back-end \(C#\)](#).

### BANT

A customer qualification methodology based on four criteria: Budget, Authority, Need, Timeframe. Read more: [Corporate sale process](#).

### BPM

Business Process Management. A management concept that considers business processes special company resources continuously adapted to changes. The principle of BPM is the transparency of business processes. This transparency is achieved by using formal notations on the modeling stage. Creatio implements this principle using a set of business process management tools. The Process Designer is the core BPM tool in Creatio. You can also use Studio Free to create descriptive (non-executable) process diagrams.

### Business process

A combination of connected user and system actions driven by flows, logical gates, and events. Business processes are some of the primary no-code tools for implementing custom business logic. Unlike unstructured [cases](#) with a dynamic execution flow, business processes require a specific sequence of actions for automatic and manual execution. Read more: [Business process setup \(BPMN\)](#).

### Business Process Model and Notation

The business process visualization standard. Creatio uses BPMN version 2.0. Read more: [Business Process Model and Notation](#).

### Business rule

The logic that determines field behavior on the page. For example, you can set up a business rule that a record cannot be saved if certain fields are left blank. Read more: [UI and business logic customization](#).

## C

### Campaign

A set of marketing activities unified by a single concept to achieve a marketing goal. A campaign runs for a

specific period and target audience. Creatio lets you nurture customer needs, notify the audience about campaign events, engage new participants, and interact with contacts using email threads. Read more: [Add a campaign](#).

## Case

Any incident, complaint, suggestion, or service request received by the contact center or support service. In Creatio, cases can be registered automatically or manually. As the case is processed, Creatio changes its status and records the solution details, links to other Creatio records, and user feedback. You can analyze cases by various parameters as well. Read more: [Service cases](#).

## Case management (DCM, ACM)

A workflow that offers a business value for a customer, partner, or stakeholder. Use cases to simplify and improve the workflow of your employees. A case consists of several tasks and steps that lead to the desired business result. The sequence of case stages is determined automatically. Unlike structured [business processes](#), case tasks and stages do not have a fixed order. Cases are usually associated with a record's life cycle in Creatio, for example, a document, an opportunity, an order, etc. Creatio uses the Case Designer to implement case management. Read more: [Case Designer workflows](#).

## Change

An action that emerges from the IT infrastructure and affects the services provided. Creatio enables users to classify the changes by source or goal, track changes implementation, and define actual working hours' final information. Read more: [Manage changes and releases](#).

## Change log

A Creatio section that logs changes in data. For example, you can check who and when deleted support cases or changed a contract amount. Read more: [Change log](#).

## Checkbox

A visual representation of a boolean field. Accepts one of the two states -  selected and  cleared.

## Cloud

A deployment method where the Creatio application is hosted on Creatio servers. Read more: [Cloud deployment](#).

## Cold audience base

Cold audience base is a list of potential customers you are yet to contact.

## Cold audience warmup

Cold audience warmup is a throttling mode where Creatio sends a limited number of emails daily after the email start. Each individual email is sent after a fixed delay. The limit of daily emails and the delay help to emulate manual sending. This enhances the reputation of the sender's domain. Learn more: [Warm up cold audience](#).

## Collection

A data set that contains complex values, each representing a series of entries. For example, a collection may be a set of contacts with the name, address, and phone number specified for each contact. This parameter type is used in scripts, web-services, tasks, preconfigured pages, and sub-processes. Read more: [Process collections](#).

## Column

A Creatio object element that stores various data types: strings, numbers, lookups, and others. The value and name of object columns correspond to the value and name of the database table. On a Creatio record page, the visual representation of a column is a field. Read more: [Creatio object data model](#).

## Communication panel

A tool in the right for communication with customers and coworkers, as well as for reading Creatio notifications. Use the communication panel to make calls, work with emails, communicate via the feed and chats, perform process tasks without distracting from the current tasks. The communicational panel consists of the following tabs:

- **Consultation panel.** The tab is available only in Financial Services Creatio, customer journey edition. It is designed for providing consultations to current and potential customers. Use the consultation panel to search for clients in the database, initiate consultations, postpone consultations.
- **CTI panel.** A [Creatio telephony](#) tool. You can make and receive calls directly from Creatio.
- **Email.** Use this tab to [work with emails](#). Send and receive emails, as well as connect them to other Creatio objects.
- **Feed.** The tab displays the messages of the [Feed] section. Use this tab to view messages you follow, as well as to add new messages and comments. The functionality is identical to the functionality of the [Feed] section.
- **Notification center.** This tab [displays notifications](#) about events in Creatio.
- **Business process tasks.** The tab displays uncompleted steps for [active business processes](#).

Press the relevant button on the communication panel to open the needed tab. To close the communication panel, click the tab button on the opened communication panel again.

## Compilation

The translation of the program code from a high-level language to a computer-oriented language. The purpose of the configuration items compilation in Creatio is to update executable files and upload static content to the ...\\Terrasoft.WebApp\\conf directory. Creatio will notify the user when the compilation is complete. Changes will become available to the users who work in this configuration.

## Configuration

A set of specified configuration settings and the process of changing these settings to meet the current needs, such as to extend and modify the functionality. Read more: [Creatio IDE](#).

## Configuration item

An IT infrastructure element that is responsible for the quality of the services provided. This includes equipment, software, and other resources. Read more: [Manage configuration items \(CI\)](#).

## Contact

The contact person of a customer or partner. Read more: [Create a contact](#).

## Contract

A document used for sales management. A contract contains customer data, payment amount, and payment terms. The [ *Contracts* ] section also contains agreements and specifications. Read more: [Create a contract](#).

## CRM

Customer Relationship Management. Software that automates customer relations. Use CRM systems to plan and manage sales, organize marketing campaigns, automate document flow, manage work time, verify task completion, and analyze performance. Creatio is recognized as one of the best [CRM systems in the world](#).

## Culture

UI language. Read more: [Manage UI languages](#).

## D

### Dashboard (analytics)

A visual representation of analytics, for example, a chart or widget. Read more: [View analytics](#).

### Data binding (to packages)

Actions that must be applied to the package data that is required for the operation of package functionality, such as lookup contents, system settings, or demo section records. You must bind the data to complete the migration of custom functionality between development environments. Read more: [Packages basics](#).

### Deduplication (find and merge duplicates)

A feature that enables users to search for duplicate section records and merge them. The bulk duplicate search is performed manually or on a schedule throughout the database. Local duplicate search checks for duplicates for a particular record and runs when you save records. By default, duplicate search is configured for [ *Accounts* ], [ *Contacts* ], and [ *Leads* ] sections. You can set up a duplicate search for any Creatio section, including custom sections. Read more: [Find and merge duplicates](#).

### Deliverability rates

Deliverability rates are marketing email metrics calculated as the ratio of delivered emails to the total number of sent emails.



## Deliverability window

Deliverability window is an interval to deliver the emails.

## Delivery Rate (Email)

One of the email marketing metrics. The delivery rate represents a ratio of the number of delivered emails to the number of sent emails. Read more: [Email delivery rates](#).

## Detail

A page element that contains data from a specific object that has a relationship with the selected record. Details usually have their own lists and are used when the main record is connected to one or multiple records in a different object. For example, details on a [ *Contact* ] record page are used to display data about contacts' activities, addresses, documents, etc. Visually, a detail is different from the field group. A detail has a toolbar that is used to manage detail's data (edit and delete records, sort and filter them, configure details, etc.) Read more: [Create a detail](#).

## Detail Wizard

A Creatio visual editor used to register new details and [configure their properties](#).

## Development environment

A separate application or several applications for developing new features. We recommend deploying such applications on the machines the developers normally use (on-site) to enable importing schemas to the file system and using different IDEs. We also recommend using the version control system (SVN) to track the changes and transfer them between development environments. Deploying a separate Creatio instance and a separate database for this instance for each developer is preferable. Read more: [Organize a development environment](#).

## DKIM record (Email)

A record added to the DNS area of the email domain. This record enables adding DKIM electronic signatures to emails sent from the domain. Read more: [Email domain verification](#).

## Document

A document type used in the company's document flow, such as regulations, minutes of meetings, and correspondence. Read more: [Create a document](#).

## Double opt-in

Double opt-in is a two-factor procedure to give consent to receive emails. First, the user must provide their email address and consent to receive emails when registering with the website. Second, they must confirm their consent by clicking the link in the email sent to their mailbox.

## Dynamic content (Email)

The content of an email that is modified depending on the parameters. The dynamic content feature enables to display or hide different content in an email, depending on the recipient's segmentation criteria, such as location, website activities, purchase history, gender, age, etc. The dynamic content is generated using dynamic content blocks. Read more: [Configure dynamic content for emails](#).

- **Dynamic content block** – a separate email section whose content changes depending on the recipient's individual characteristics.
- **Dynamic content rule** – a method of segmenting an email audience. Use the dynamic content rules to specify the corresponding segmentation conditions and display specific content blocks. Use filtering by contact data available in Creatio to configure the dynamic content rules (e.g., apply a filter by the account's industry or country).
- **Dynamic content replica** – an email template version generated based on a combination of dynamic content rules (i.e., as seen by an email recipient that belongs to a specific segment(s)).
- **Dynamic content segment** – the content of a separate dynamic content block matching a specific rule.

## E

### Email

A digital marketing tool that sends out emails to a significant number of recipients simultaneously.

- **Bulk email** – an email that sends a batch of messages once. Read more: [Bulk email](#).
- **System email** – an email that sends out important non-marketing emails, such as notifications about updates or service availability issues. Creatio sends system emails regardless of whether the [ *Do not use email* ] checkbox is selected in the [ *Communication channels* ] tab of the recipient's contact record. Read more: [Send a system email](#).
- **Test email** – a mock-up email. Send it to check how the recipients will see the emails. Read more: [Send a test email](#).
- **Trigger email** – an automatic email that is sent when a specific event is caught. For example, you can send a trigger email to a website visitor who submitted a web form. Use trigger emails to send interest-based messages tailored to a specific customer at a given moment: welcome emails, order confirmations, birthday wishes, sale end date reminders, etc. Read more: [Trigger email](#).

### Email audience segment

Email audience members who receive a specific dynamic content replica. Read more: [Configure dynamic content for emails](#).

### Email template

An editable email layout that comprises one or more content blocks of different types. For example, an email template can have dynamic and static blocks that contain text, HTML code, images, macros, etc. You can use a default template, select an out-of-the-box template from the [ *Email templates* ] lookup, or create a new template. Read more: [Create an email template](#).

## Email throttling

Email throttling is the distribution of sent emails in time. Use throttling to split a large email into multiple parts and send them to the email provider one by one during the specified period. Learn more: [Set up the email throttling queue](#).

## Employee

A current or former employee of your company. Creatio stores employees' personal data, probation periods, onboarding plans, up-to-date information on career movements within your company, etc. Read more: [Create a new employee](#).

## Event

An event arranged to identify the customer needs, attract new customers, maintain and improve the relationships with the existing customers, as well as train them. Read more: [Plan marketing events](#).

## Event (business processes)

In Creatio, business process events are elements that start, stop or terminate the process flow. There are throwing (they generate an event completion signal when activated), waiting (they wait for an event to resume their process branch) events, as well as starting and finishing events. Unlike process actions, events do not perform tasks. Instead, they trigger actions or are triggered by them. Read more: [Events](#).

# F

## Field

A record page UI element for viewing and updating the contents of columns or business processes, dynamic cases, and campaign parameters. The fields can have string, numeric, boolean, and date/time values, as well as be selected from a list or a lookup. A field corresponds to an object column on the database level. Read more: [Work with record pages](#).

- **Types of fields** – a property that indicates the data type the field accepts. The following types of fields are supported: String, Integer, Decimal (floating point), Date, Lookup, and Boolean.

## Field group

Fields that are grouped according to the set conditions. Unlike a detail, a field group does not have a toolbar or a record list and does not correspond to a separate object on the database level. Read more: [Work with record pages](#).

## Filter

A tool for condition-based record search and segmentation. Filters are both a separate Creatio tool and a part of other tools, such as setting up dynamic folders, dashboards, or business processes. Read more: [Filters](#).

- **Quick filter** – available in certain Creatio sections. Use quick filters to filter data by the most frequently used conditions (typically, by the date and the owner). For example, the [ *Activities* ] section contains a quick filter

as you usually need to analyze an employee's activity during a specific period.

- **Advanced filter** – a filter with several search parameters and complex conditions. For example, use it in the [ *Activities* ] section to display all meetings with new customers. Save the parameters and conditions of an advanced filter as a dynamic folder to reuse them in the future.
- **Standard filter** – use it to search for records by the values specified in one or more columns of the current section. Available in most section lists. For example, use the standard filter in the [ *Accounts* ] section to find all accounts of a given type and from a given region.

## Flow (business processes)

A connection between the process elements that determines their order of execution. Creatio includes the following types of flows in accordance with BPMN: sequence flows, default flows, and conditional flows. Read more: [Business process flows and connecting objects](#).

## Folders

A filtering tool to group records that match certain conditions. Folders can form a hierarchical structure. Read more: [Folders](#).

- **Dynamic folders** contain only section records that match the specified filter conditions. For example, you can create a dynamic folder “New customers” to filter records by date created. The content of a dynamic folder is created and updated automatically.
- **Static folders** include only section records that have been added to these folders manually or by conversion from the dynamic folder. “VIP” or “Blacklist” are examples of static folders because the decision to include certain customers into these folders is made for each record individually.

## Front end (Interface)

The client side of the UI. The user interacts with this functionality directly. Read more: [Front-end development](#) and [Front-end \(JS\)](#).

## Functional role

A role that corresponds to the job position of an employee. For example, “Salesperson.” You can assign access permissions to any functional role. Such permissions will apply to all employees with certain job positions, regardless of the company division. Read more: [Functional roles](#).

# G

## Global Search

A quick search functionality in Creatio. To use it simply enter a search query into the command line. Creatio can search in all sections (including custom sections). Read more: [Search records and run commands](#).

# H

## Historical data

A collection of data obtained from system records to train a model. Records are considered historical if they were created and populated with data before training a new machine learning model instance. Read more: [Predictive data analysis](#).

## HTTP/HTTPS

**HTTP** - HyperText Transfer Protocol. An application-level data transfer protocol based on the “client-to-server” paradigm. The client initiates the connection by sending a request, the server executes the request upon receiving and sends the results back to the client.

**HTTPS** - HyperText Transfer Protocol Secure. An HTTP extension protocol complete with SSL and TLS encryption. Read more: [Switch a Creatio website from HTTP to HTTPS](#).

## I

### IDE

Integrated Development Environment. Creatio provides a built-in IDE to implement complex business logic, integrations, and settings. The built-in IDE tools speed up the completion of the typical platform configuration tasks. For Creatio customization, developers can use a third-party IDE that enables working with projects in the local file system. Read more: [Creatio IDE](#) and [Creating applications on Creatio platform](#).

### IIS

Internet Information Services. A web server deployment software developed by Microsoft. Setting up a Creatio application server (web server) on IIS involves setting up an application website in IIS and adding an application pool. Read more: [Set up Creatio application server on IIS](#).

## Incident

A case that is not a part of a standard service operation. It may cause service disruption or reduction of service quality. For example, a request to repair hardware or restore telephone communication. Read more: [Process and close cases](#).

## IP

The IP address is the unique numeric ID of the computer or email server that sends the emails. Learn more: [Email domain verification](#).

## ITIL

IT Infrastructure Library. A library that describes the best practices for organizing the work of structural units or companies that provide IT services. The ITIL methodology implies continuous management, debugging, and improvement of IT-related business processes. ITIL recommendations and principles laid the foundation for Service Creatio – a powerful Service Desk system based on the smart business process management platform.

## ITSM

IT Service Management. A strategy for the management and organization of IT services aimed to meet the needs of the business. The key factor is an optimal combination of people, processes, and information technology. Creatio uses the ITIL documentation to facilitate the implementation of ITSM. Read more: [ITSM tools](#).

## K

### Knowledge base

A section that is available in every Creatio product that serves as a digital library that is used by employees daily. The Knowledge base section can store the answers to frequently asked questions, rules and regulations, document templates, and advertising materials. Use the section to quickly find articles, as well as discuss and evaluate them. Read more: [Create a knowledge base article](#).

## L

### Landing page

A web page with materials that provide value to the customers. Use landing pages to gain information about the customers and their current needs. Integrate landing pages with Creatio via the [ *Landing pages and web forms* ] section. Each section record contains information about the landing page, for example, its name, link, etc. These records establish a connection between a website landing page and Creatio. Embed the [ *Landing pages and web forms* ] section record's unique HTML code in the landing page's code on the website to connect the two entities. Read more: [Integrate with landing pages and web forms](#).

### Lead

A need for your products expressed by a customer. Each customer need is a separate lead in Creatio. Creatio can register an unlimited number of leads for each contact or account. Read more: [Create a lead](#).

### Lead source tracking

The retrieval of information about lead sources and channels. Read more: [Lead source tracking](#).

### List

A UI element that displays the list of section or detail records. For example, a list of contacts in the [ *Contacts* ] section. Read more: [Work with record lists](#).

- **Vertical list** – a list view that allows users to switch between the records without closing the page.
- **Editable list** – a record list that allows users to edit records directly in the list without opening the record pages.

### List view

The way the section displays its records. Read more: [Work with record lists](#).

- **Tile view** – the section displays records in multiline tiles.
- **List view** – the section displays records as a simple table. Every object field has a corresponding column.

## Logging

Automated recording of operations made to a specific Creatio object. Creatio logging tools include change log and audit log, while business process execution is logged in process log. Read more: [Logging tools](#).

## Long sales

A sales cycle that can take a long time (from weeks to years) and may require recurring meetings, presentations, and negotiations. Examples of long sales include the acquisition of complex and expensive industrial equipment, real estate deals, consulting, and engineering services. Creatio comes with the out-of-the-box best practice business process for managing corporate sales that guide the customer through the sales pipeline. Outline tactics, key competitors and their strengths/weaknesses, contacts on the customer side, and their decision-making roles for each deal. You can also predict the probability of winning a deal based on the customer budget, opportunity stage, and other parameters. Read more: [Corporate sale process](#) and [Long sales \(e-course\)](#).

## Lookup

An object that stores available values for a given field. A lookup can contain a list of cities, account types, activity categories, and other values used in Creatio. You can enter the available values manually or import them. Read more: [Manage lookup values](#).

## Lookup value prediction

A predictive analysis tool that allows you to predict the lookup field value based on the analysis of existing Creatio data. Creatio comes with case priority, service agreement, and case assignee group predictions out-of-the-box. Use the customization tools to set up similar models. Read more: [Lookup value prediction model](#).

## Low-code

An approach to creating, configuring, and modifying software systems and applications that require minimal coding. Rather than use a programming language, low-code platforms take advantage of visual interfaces with simple logic and drag&drop. Intuitive tools enable users to create custom applications without coding expertise or knowledge of software development processes. Read more: [No-code](#).

# M

## Machine Learning model

An algorithm that specifies the data used in the problem solving predictive analysis. The list of machine learning models is available in the [ *ML models* ] section. Read more: [Predictive data analysis](#).

## Machine Learning model instance

A set of patterns a machine learning model obtained after processing the historical data. Read more: [Predictive](#)

[data analysis](#).

## Marketing activity

1. An activity within a marketing plan. The list of marketing activities can be found in the [ *Marketing plans* ] section and is not to be confused with the [ *Activity* ] section records. Read more: [Plan marketing budget](#).
2. A section record on the partner portal that enables partners to create custom promotional events. Approve partner marketing activities and set their budget in the main application. When a partner adds a new marketing activity, it will also appear in the main application's partnership page. The portal organization account will be specified as the partner. Read more: [Working with partner funds](#).

## Marketing plan

A list of marketing activities used to plan out the marketing strategy of a company. The list contains activities with assigned owners, deadlines, and budgets. Read more: [Plan marketing budget](#).

## Mini page

A short version of a section record page with a limited number of fields. Mini pages function as pop-up boxes that link to the corresponding records. Read more: [Work with mini pages](#).

## ML problem type

A set of instructions, which describes a problem that must be solved by predictive analysis. The list of problems is available in the [ *ML problem types* ] lookup. Read more: [Predictive data analysis](#).

## Model training

A process, during which the machine learning model identifies patterns in historical data that help to solve a particular machine learning problem. The result of model training is a new machine learning model instance. Use the [ *ML models* ] section to specify the model retraining frequency. Read more: [Train prediction models](#).

## MS Word plug-in

A program module dynamically linked to Creatio. Use the module to generate \*.docx print-ready reports based on Creatio section records. Read more: [Install Creatio plug-in for MS Word](#).


## MSSQL

An object-relational database management system developed by the Microsoft Corporation. Creatio products support MSSQL. The primary query language is Transact-SQL, jointly developed by Microsoft and Sybase. Transact-SQL implements the ANSI/ISO Extension Structured Query Language standard.

## N

## Notification center



A list of notifications about various Creatio events. Click the  button on the communication panel to open it. The notification center displays activity and invoice reminders, feed comments, corporate social network mentioning, system notifications, etc. Read more: [Check notifications and process tasks](#).

## Numeric field value prediction

A predictive analysis tool that allows you to predict the value of a numeric field based on the analysis of existing Creatio data. For example, use the customization tools to predict the lead budget based on the customer need, the company size, the country of residence, and the industry type. Read more: [Numeric field value prediction](#).

## O

### Object

An entity that represents a certain business category. An object is a view of a database table. Creatio uses objects to generate sections, details, and lookups. For example, “Contact,” “Activity,” “Communication options,” and “Account category” are objects. Read more: [Creatio object data model \(e-course\)](#).

### Omnichannel

Mutual integration of isolated communication channels into a single platform for continuous and seamless customer communication. You can continue a process the customer has started using one communication channel via another channel. Use the built-in functionality, connectors, and Creatio Marketplace solutions to implement omnichannel communication in Creatio.

### On-site

A deployment method where the Creatio application is hosted on the customer’s servers. Read more: [On-site deployment](#).

### Operations with data

The basic data operations in Creatio are “create,” “read,” “update,” and “delete” (CRUD operations). They can be executed by users manually, run in bulk via special actions, or triggered by business processes. In Creatio, you can set up access permissions for specific operations. For example, if a user or user role has the “Read” access permission, they can view the records. Read more: [Process data](#) and [Object operation permissions](#).

### Opt-in

Opt-in is consent to receive emails.

### Opt-out

Opt-out is the ability to unsubscribe from a mailing list.

### Oracle Database

An object-relational database management system developed by the Oracle company. Creatio products support Oracle Database. Oracle Database uses SQL and the procedural SQL extension developed by Oracle known as PL/SQL (Procedural Language/Structured Query Language). PL/SQL is based on Ada and Pascal syntaxes.

## Order

A request to purchase a company's products or services. An order includes specific shipment conditions, price, and a product list. Creatio enables order management in both short and long sales. Read more: [Create an order](#).

## Organizational role

Represents a part of the company's organizational structure, such as a unit, a department, or a subdivision. For example, the "Boston Office Sales Department" or the "Washington Office HR Department." Access permissions you assign to each organizational role apply to all of its users. Organizational roles also automatically inherit access permissions from their parent organizational roles. Read more: [Organizational roles](#).

## P

### Package

A combination of configuration elements (schemas, data, SQL scripts, additional libraries) that implements specific functions. In the file system, packages are directories with various subdirectories and files. Read more: [Packages basics](#).

### Page

A UI element for working with the list records. A page stores all the information about the business objects and displays the data as fields, tabs, details, and dashboards. A page is named after the corresponding Creatio object. For example, account page, contact page, etc. Read more: [Work with record pages](#).

### Partner

An account of the "Partner" type is linked to a portal organization as well as any portal user linked to such an organization. You can find basic partner data (name, type, address, primary contact person, communication options, and more) in the main application's [ *Accounts* ] section. A partner can work with your customers on your behalf using the partner portal. Read more: [Channel sales](#).

### Partner program

A representation of the current status and conditions of cooperation between your company and a partner organization. Configure partner programs in the main application. The portal users can view the program details only for their own organization and cannot edit them. The [ *Partner program* ] section is designed for partners and their employees. This section contains all information relevant to them and their work. Read more: [Channel sales](#).

### Partnership

A representation of the current status of your cooperation with a partner. You can find the data about the company's partners and related partnerships in the main application's [ *Partnership* ] section. This section is best suited for use by employees in charge of interaction with partners. Use it to set up the cooperation conditions and add as many partnerships as needed, but no more than one per partner. The partner portal displays the partnership's conditions as a partner program. Read more: [Channel sales](#).

## Portal Creatio

A component that provides a way to open up various parts of Creatio to external users (e. g., customers, partners, contractors, stakeholders, or even teams within your company). Read more: [Portal Creatio overview](#).

- The **customer portal** is a platform that automates processes. For example, providing services, confirming applications and service requests, etc.
- This **partner portal** is a platform for communication with partners and cooperation on leads, opportunities, and marketing activities.
- The **self-service portal** is a platform for user support that extends the service system. The self-service portal lets users find answers to their questions in the knowledge base, create and track their support cases' progress, or communicate with the support staff via the feed. The self-service portal is available to your customers 24/7.

## PostgreSQL

An open-source object-relational database management system. Creatio supports PostgreSQL. Supports the PL/pgSQL, PL/Perl, PL/Python, and PL/Tcl dialects out of the box. The PL/Java, PL/PHP, PL/Py, PL/R, PL/Ruby, PL/Scheme, PL/sh, and PL/V8 dialects can be installed additionally. You can load extension modules written in C as well. PostgreSQL is implemented on multiple Unix-like platforms, including AIX, BSD systems, HP-UX, IRIX, Linux, macOS, Solaris/OpenSolaris, Tru64, QNX, as well as on Microsoft Windows.

## Pre-production

A separate application for testing the functionality created in the developer environment. Depending on your needs, you can deploy the application either in the cloud or on-premises (on-site). Read more: [Organize a development environment](#).

## Predictive data analysis

A class of data analysis methods that predicts the behavior of the analysis object under given conditions. It uses statistical methods to analyze current and historical data and predicts future events. Read more: [Predictive data analysis](#).

## Predictive scoring

A predictive analysis tool that allows you to rate any Creatio section record to determine the probability of a future event. The predictive score is calculated according to the scale from 1 to 100 points. Creatio comes with the lead score prediction model out of the box. Use the customization tools to set up similar models. Read more: [Predictive scoring](#).

## Price list

A price management tool for different customer categories. When issuing orders, use either the universal “base” price list or a personalized list for customers or affiliates. Read more: [Manage prices](#).

## Print-ready reports

A Microsoft Word \*.docx file generated from Creatio section records. For example, use reports of the [ *Contracts* ] section to print out contract templates or reports of the [ *Activities* ] section to print out emails, generate meeting minutes, etc. The MS Word plug-in populates the list of Creatio database columns to use in the report. Upload the list to Creatio to set up the report layout: page structure, text formatting, tables, etc. Read more: [Print-ready reports](#).

## Problem

The root cause of one or more cases. For example, frequent breakdowns of a certain product node can be considered a problem. Effective problem management decreases the impact of cases on the service level and prevents further cases. Read more: [Manage problems](#).

## Process element

A part of the business process diagram. Process elements are divided into the following groups: user actions (for example, [ *Perform task* ]), system actions ([ *Change access rights* ]), starting and finishing events ([ *Start timer* ], [ *Terminate* ]), intermediate events ([ *Wait for message* ]), logical gateways, and sub-processes. Read more: [Process elements reference](#).

## Process library

A Creatio section that stores business process diagrams configured in Creatio. In the process library, you can add a new process, open the process diagram or view the process properties: the versions, permission to run and the run options, the list of sub-processes and the process log. The process library lets you run, deactivate, and activate processes. Read more: [Find a process](#).

## Process log

A Creatio section designed to manage business processes that have been launched (process instances). Use the process log to view the execution history of a process or cancel a running process instance if necessary. Read more: [View process execution data](#).

## Process parameter

A business process property. In Creatio, the business process parameters affect how business process elements are executed. Creatio uses them to exchange data between the process elements or between a subprocess and its parent process. Business process parameters accept values of different data types: text, numerical, lookup, etc. You can use the values to branch processes with logical gateways and conditional flows. Process element parameters used with individual process elements work in a similar way. Read more: [Process parameters](#).

## Product

A product or service your company offers. Creatio allows you to manage a product catalog complete with product descriptions, specs, prices, and other parameters. Read more: [Add products](#).

## Production Environment

A separate Creatio application for everyday user activity. Depending on your needs, you can deploy the application either in the cloud or on-premises (on-site). Read more: [Organize a development environment](#).

## Project

An undertaking intended to achieve specific results. For example, create a new product or develop a new service. Read more: [Create a project](#).

## Q

### Quality metric lower limit

The prediction probability threshold the model instances must reach to be considered usable for predictions. Creatio does not use the instances that do not meet the quality metric lower limit and queues them for retraining. We recommend setting the quality metric lower limit to a value higher than 0.5 (50%). You can modify the model's quality metric lower limit value in the [ *ML models* ] section. Read more: [Predictive data analysis](#).

## Queue

A contact center tool for automated record flow processing. Agents process queues using the agent desktop. Although queues usually consist of cases, you can set up queues for other Creatio objects, such as accounts and contacts. A queue can be populated automatically or filled manually. Depending on the queue settings, agents either can select what record to process first or process records exactly as they appear. Read more: [Agent Desktop setup](#).

- **Dynamic queue** – a queue type that is populated automatically according to the filter rules. For example, use a dynamic queue to process new cases that do not have an owner yet.
- **Static queue** – a queue type that is filled manually and is not updated automatically. For example, use a static queue to cold-call contacts from a predefined contact folder and inform them about events.
- **Open queue** – a queue type where employees can select any records for processing. The record order depends on the record sorting rules in the agent desktop.
- **Blind queue** – a queue type that assigns records to employees one by one. The agent is unable to change the queue record processing order.

## R

### Recommendation prediction

A predictive analysis tool that allows you to predict Creatio objects that will interest the customers the most.

Creatio comes with product recommendation prediction models out of the box. If there are enough training records (more than 100), Creatio will train these models automatically and start recommending products the customer is likely to purchase. Use the customization tools to set up similar models. Read more: [Recommendation prediction](#).

## Redis

An open-source resident NoSQL DBMS that works with “key-value” data structures. The Redis caching server is part of Creatio data’s logical layer. Redis stores user and application data (user profile, session data, etc.), cached data, and ensures the data exchange between the web farm nodes. Read more: [Redis caching server](#).

## Release

Hardware, software, and other implementations of changes to an IT infrastructure. For example, a release can introduce new features or resolve issues. Creatio allows you to save the version list, track the release calendar, and manage the change log. Read more: [Manage changes and releases](#).

## Response (bulk emails)

A reaction of a mail system or recipient to an email. The [ *Audience* ] tab on the email page displays responses from each recipient. The [ *Email totals* ] tab on the email page displays response analytics. Read more: [Personal responses](#).

## S

### Schema (database)

A database structure described in an SQL supported by the DBMS.

### Script

A sequence of actions that automates a task, programmed using a scripting language. Read more: [\[Script task\] process element](#).

### Section

A Creatio module that represents a business entity and contains a set of records. For example, there are [ *Accounts* ], [ *Contacts* ], and [ *Activities* ] sections. The sections are available on the side panel. You can group them by the workplace to streamline the workflow of specific roles. Read more: [Create a new section](#).

### Section view

The way the section displays its data. Most Creatio sections have the [ *List* ] and [ *Dashboards* ] views. Some of the sections use other views, such as the [ *Calendar* ] view in the [ *Activities* ] section. Read more: [Work with record lists](#).

### Section Wizard

A visual editor used to create and set up Creatio sections, pages, and mini pages. Read more: [Section](#).

## Send time (Email)

Initiation of the email sending process. Users can send emails manually or automatically, at a specified time, or upon a certain event. Trigger and bulk emails are started in different ways. Read more: [Start a bulk email](#) and [Start sending trigger emails](#).

## Sender domain

The sender domain is part of the email address that identifies the sender. Learn more: [Email domain verification](#).

## Sender domain verification (bulk emails)

Authentication of the sender's email domain. Domain verification is performed to display the correct name of a sender in the "From" field and to avoid unsanctioned emails on your behalf. Verification is performed on the domain server using the Sender Policy Framework (SPF) and DomainKeys Identified Mail (DKIM) methods. Read more: [Email domain verification](#).

## Sender reputation

The sender's reputation is the rating of the sender's campaigns with an email provider, such as Gmail. The score depends on the email frequency, campaign scale, and the recipient engagement. The reputation affects the deliverability. Learn more: [Guidelines for improving the sender's reputation](#).

## Service

A service provided by the company. Creatio allows you to set the parameters of the services provided, set up support levels, case categories, service calendars, as well as view the service history. Read more: [Manage service catalog](#).

## Service agreement

Terms for providing the services to customers. Creatio follows the "Service level management" ITSM process. You can define the individual terms of service for each agreement and view the statistics in the [ *Service agreements* ] section. Read more: [Manage service agreements](#).

- **SLA** – service level agreement. Use it to define the service parameters for the end-users.
- **OLA** – operational level agreement. Use it to define the internal service agreements of your company. For example, the agreements between the company departments or employee groups.
- **UC** – underpinning contract. Use it to define the agreements between your company and its suppliers.
- **Default service agreement** – a contract with the minimum set of services. Provide customer service according to this agreement if Creatio is unable to find an appropriate service agreement for a particular case. You must specify the default service agreement in the corresponding system setting.

## Service model

A scheme that illustrates the connections between the elements of an IT infrastructure. The service model is

based on the connections between the services and the configuration items. You can open the scheme via records of the following sections: [ *Cases* ], [ *Configurations* ], [ *Services* ], [ *Problems* ], and [ *Changes* ]. Read more: [Diagnose cases using service model](#).

## Service request

A case created as a part of the normal operation of the service. For example, a request for a new user workplace or phone service setup. Read more: [Process and close cases](#).

## Short sales

A quick sale that requires a high processing rate for the incoming requests and fast decision-making on the sales conditions (discounts, payment delays). In Creatio, you can work with short sales by creating orders and invoices with installment plans, a list of products, discounts, etc. Use an approval process to validate sale conditions. Read more: [Create an order](#).

## Side panel (section panel)

The panel on the left side of the screen, which is used to navigate workplaces and sections. The side panel also contains buttons for quick access to the basic system operations. Read more: [Add corporate logo](#) and [Set up workplaces](#).

## SPF record (Email)

A special "TXT" record you must create in the DNS area of your email domain. The SPF record specifies the servers that permit sending emails for your mail domain. Only one SPF record can exist for a domain. You can verify your SPF record using [SPF Record Testing Tools](#). Read more: [Email domain verification](#).


## Split test (A/B testing)

An experimental method to assess the bulk email efficiency. When running a split test, the test recipient groups receive targeted bulk emails with one or more differences in their content. Such differences may include the shape or color of the CTA button, the subject, the sender name, etc. The resulting conversion rates are compared at the end of the test. Read more: [Run A/B tests](#).

## Sub-process

A process element capable of running any business process as part of the parent process flow. For example, use the [ *Sub-process* ] element in an opportunity process that includes a "Meeting with customer" stage represented by a separate Creatio business process. Read more: [Use sub-processes](#).

## System Designer

A set of tools designed for setup, customization, and administration of the Creatio application. Use the System Designer to adapt Creatio to your company's needs by creating a custom section structure, business logic, and a brand book-compliant UI. To access System Designer click  in the top right corner of the application, or the [ *System Designer* ] link on the Creatio home page or the [ *Studio* ] workplace.



## System operation

A tool that configures permissions for actions not related to specific objects. The permissions to execute such actions cannot be configured on the object-specific read, update, and delete access permission levels. For example, these functions include import and export operations, business process creation, workplace setup, system configuration, etc. The operations have two access levels: complete or none. For example, grant the “All employees” role permission to perform the “Export list records” (“Export list records”) system operation. As a result, all users will be able to export the section list data as Excel files. Read more: [System operation permissions](#).

## System setting

A constant value used to set up and customize Creatio. For example, use the system settings to set the section panel background color, select the base currency for calculating financial indicators, specify the email sending parameters, etc. You can also use system settings to specify default values Creatio will use to populate fields of newly-created records, such as the default activity status. Read more: [Manage system settings](#).

## System user (Supervisor)

The user specified in the [ *System operations user* ] system setting. The user must possess a full license package and have all access permissions to ensure the correct operation of Creatio. By default, each Creatio configuration has the “Supervisor” user account set as the system user. A system user account is needed both for system administration/configuration and to ensure the system operations work correctly. For example, Creatio indexes global search data saves changes in section and detail wizards and sends newsletters on behalf of the system user. If you delete the system user, revoke access permissions or licenses, Creatio may not function properly. Read more: [Change the “system” user \(Supervisor\)](#).

## T

### Tag

A label you can use for manual data segmentation. For example, tag records in the [ *Contacts* ] section to mark your VIP customers or the blacklisted customers. Read more: [Tags](#).

## U

### Unsubscription (bulk emails)

Refusal to receive emails in the future. A recipient is considered unsubscribed after they follow a special “unsubscribe” link contained in each email. Upon clicking the link, recipients are redirected to the pre-configured unsubscribe page. Specify the unsubscribe page in the “Website to redirect the unsubscribed” system setting. Read more: [Set up an unsubscribe link in emails](#).

### User session

The period between the time the user logs in and the time they close Creatio. The session ends automatically if the user is idle for a specific period. The [ *Audit log* ] stores the information about user sessions.

## V

### Version control system (VCS)

Software that stores different versions of the configuration items and provides means to transfer the changes between development environments. A version control system is an optional component of Creatio architecture. Creatio supports the Subversion (SVN) system version 1.7 and later. We recommend transferring changes with SVN in the development environment only. Deploy SVN on the application server, the DBMS server, or a dedicated server. Read more: [Version control in Subversion](#).

## W

### Warm audience base

Warm audience base is a list of engaged contacts possibly interested in your goods or services.

### Web service

A URL-reachable software that enables application interaction. Creatio has some built-in web services and enables the development of custom web services, and supports low-code integration with third-party REST and SOAP services. Based on the custom business logic, Creatio will generate and send a request to the web service, receive a response, and produce the required data. This data can be used to create or update records in the Creatio database and business logic or automation. Read more: [Getting started with low-code web service integration](#) and [Custom web services](#).

### Website event tracking

User activity data collection on your website. You can set up tracking of page visits, as well as the list of page events you want to track (e. g., adding products to cart, or making an order). Read more: [Website event tracking](#).

### Websocket

A data protocol over TCP designed for real-time data exchange between the browser and the webserver. The WebSocket protocol is used in Creatio to run custom processes, notifications, and integration with telephony. Read more: [Set up WebSockets](#).

### Workplace

A set of sections displayed on the Creatio side panel for specific user groups (roles). Read more: [Set up workplaces](#).