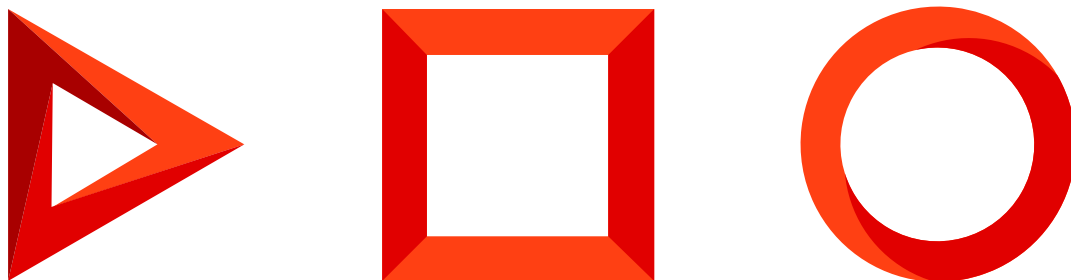


New push notification

Set up push notifications for mobile application users

Version 7.17



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Table of Contents

Set up push notifications for mobile application users

4

Set up push notifications for mobile application users

PRODUCTS: ALL CREATIO PRODUCTS

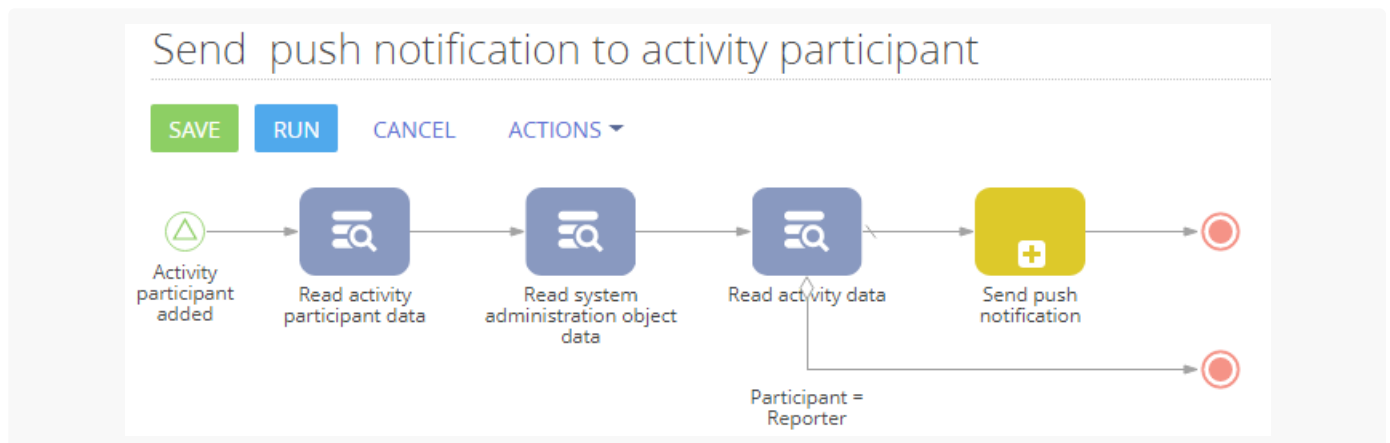
Creatio [mobile app](#) uses [push notifications](#) to display custom notifications on mobile devices. These “push notifications” are generated by a pre-configured “Send push notifications” BPMN process. Use it as a [sub-process](#) to integrate push notifications in your custom processes and cases.

Example. Create a business process that will send a push notification to mobile app users once they are added to activities as participants. The notification message displays the name of the activity and text “You have been added as participant”. By tapping the notification, the user opens the corresponding activity record.

Business process diagram (Fig. 1) elements:

1. [\[Signal\]](#) start event: “Activity participant added” – the process is triggered when a contact is added to activity participants.
2. [\[Read data\]](#) system action: “Read activity participant data” – the process obtains activity participant data needed to perform the next steps.
3. [\[Read data\]](#) system action: “Read system administration object data” – based on the activity participant data, the process obtains information on the user whose contact was added to activity participants.
4. [\[Read data\]](#) system action: “Read activity data” – based on the activity participant data, the process obtains information on the activity record. Outgoing [conditional flow](#) to the terminate element that will end the process if the activity participant is the same as the activity author (to avoid sending push notification to the activity author). Outgoing default flow to the “Send push notification” sub-process.
5. [Sub-process](#): “Send push notification” – the process sends push notification to the specified user with the specified text.

Fig. 1 The “Send push notification to activity participant” process

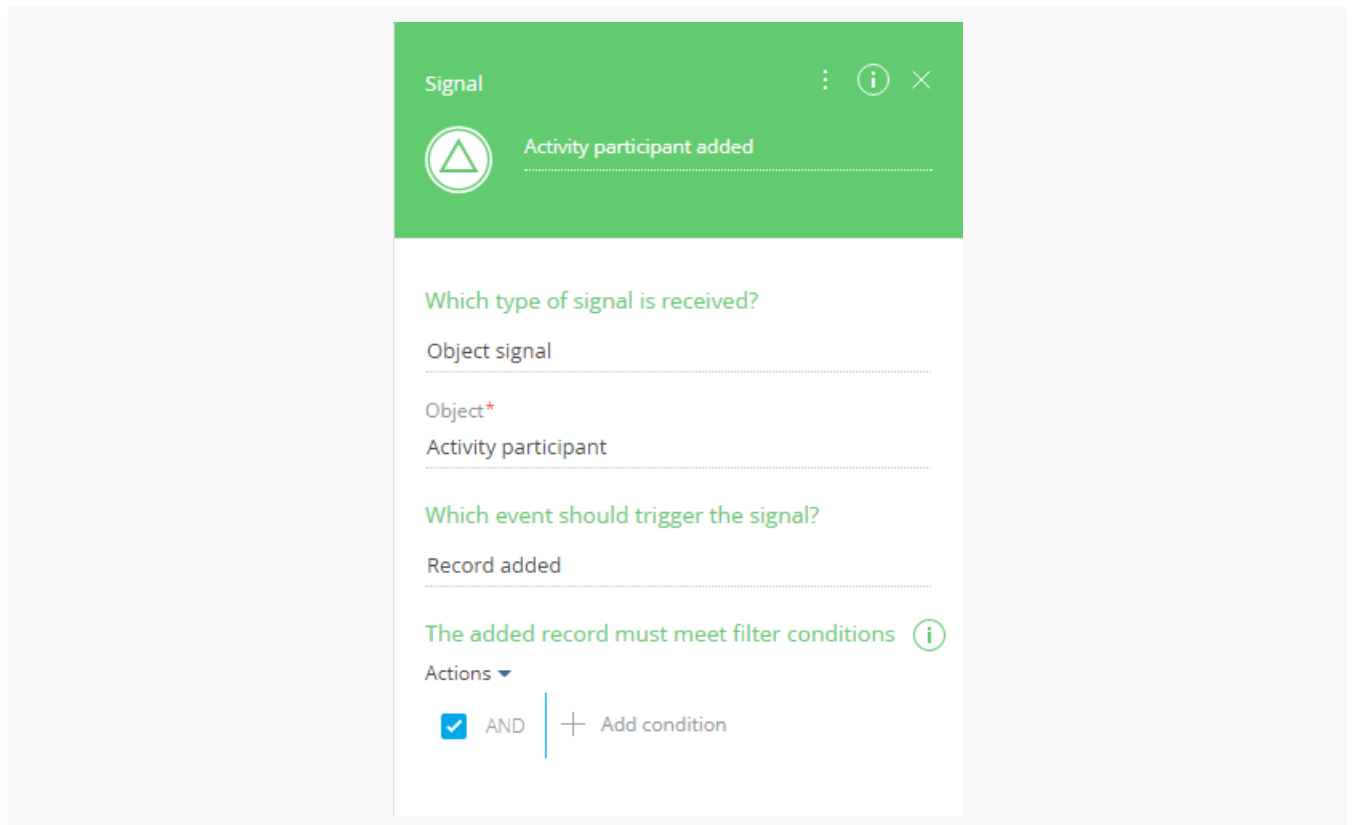


To configure the process:

1. Place the [*Signal*] element of the [*Initial events*] group on the schema — "Activity participant added". The element will be activated when a contact is added on the [*Participants*] detail of the activity.
2. Set up the signal parameters:
 - a. In the [*Which type of signal is received?*] field, select "Object signal".
 - b. In the [*Object*] field, select "Activity participant".
 - c. In the [*Which event should trigger the signal?*] field, select "Record added".

The "Activity participant added" element properties (Fig. 2):

Fig. 2 The "Activity participant added" element



3. Set up the "Read activity participant data" element properties (Fig. 3):

Fig. 3 The "Read activity participant data" element properties

Read data

Read activity participant data

Which data read mode to use?
Read the first record in the selection

Which object to read data from?
Activity participant

How to filter records?

Actions ▾

AND

Id =
Activity participant added.Unique identifier of record

+ Add condition

How to sort records?
+ Add

What record data should the process read?
Read data from selected columns only

Activity

Participant

+ Add column

- In the [*Which data read mode to use?*] field, select “Read the first record in the selection”.
- In the [*Which object to read data from?*] field, select “Activity participant”.
- Set up the following filter in the [*How to filter records?*] area: “Id = Activity participant added.Unique identifier of record”.

Note. To set the “Id = Activity participant added.Record Id” filter: click [*Add condition*], select the [*Id*] column; click [*<?>*] and select [*Compare with parameter*] command; select the “Activity participant added” signal in the list to the left, and select the “Id” column in the list to the right.

- In the [*What record data should the process read?*] field, select “Read data from selected columns only”.
- Add the “Activity” and “Participant” columns (only these two columns from the activity participant record will be used further in the process).

Note. We recommend to restrict the list of columns, whose values are read by the [*Read data*] elements, to those used in the process. This will increase the overall Creatio performance and lower the hardware load in applications with many processes in progress.

4. Set up the “Read system administration object data” element properties (Fig. 4):

Fig. 4 The “Read system administration object data” element properties

The screenshot shows a configuration window titled "Read data" with a search icon and a close button. The main title is "Read system administration object data". The configuration is divided into several sections:

- Which data read mode to use?**: "Read the first record in the selection"
- Which object to read data from?**: "System administration object"
- How to filter records?**:
 - Actions: AND
 - Condition: Contact = Read activity participant data.First item of resulting collection.Participant
 - + Add condition
- How to sort records?**: + Add
- What record data should the process read?**: "Read data from selected columns only"
 - Id
 - + Add column

- In the [*Which data read mode to use?*] field, select “Read the first record in the selection”.
- In the [*Which object to read data from?*] field, select “System administration object”.
- Set up the following filter in the [*How to filter records?*] area: “Contact = Read activity participant data.First item of resulting collection.Participant”.

Note. To set the “Id = Read activity participant data.First item of resulting collection.Participant” filter: click [*Add condition*], select the [*Contact*] column; click [*<?>*] and select [*Compare with*

parameter] command; select the “Read activity participant data” element in the list to the left, and select the “Participant” column in the list to the right.

- d. In the [*What record data should the process read?*] field, select “Read data from selected columns only”.
 - e. Add the “Id” column (the “Send push notification” process will require the identifier of the user to send push notification to).
5. Set up the “Read activity data” element properties (Fig. 5):

Fig. 5 The “Read activity data” element properties

The screenshot shows the configuration window for the "Read activity data" element. The window title is "Read data" and it contains a search icon and the text "Read activity data". The configuration is as follows:

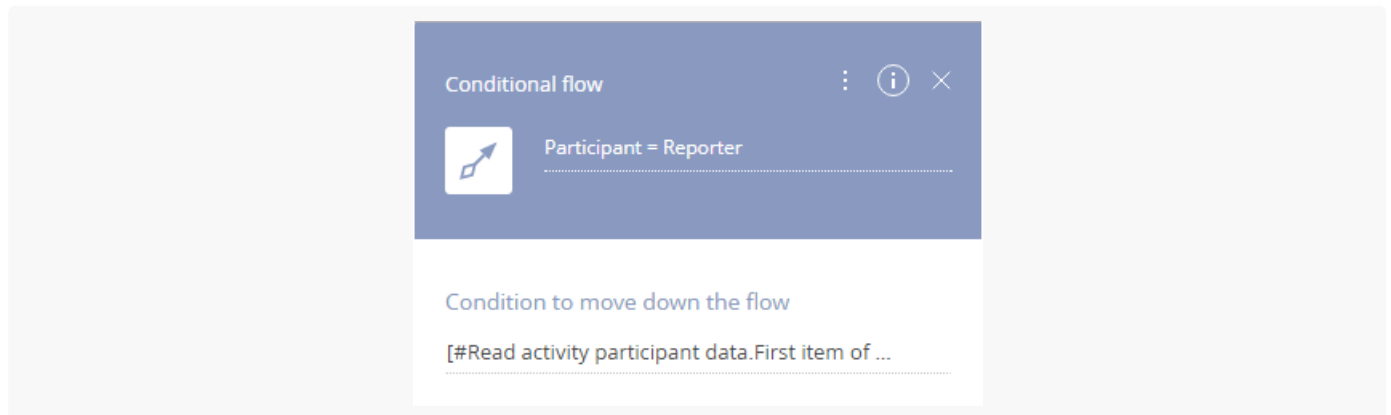
- Which data read mode to use?** Read the first record in the selection
- Which object to read data from?** Activity
- How to filter records?**
 - Actions: AND (checked)
 - Condition: Id = Read activity participant data.First item of resulting collection.Activity
 - + Add condition
- How to sort records?** + Add
- What record data should the process read?** Read data from selected columns only
 - Reporter
 - Subject
 - + Add column

- a. In the [*Which data read mode to use?*] field, select “Read the first record in the selection”.
- b. In the [*Which object to read data from?*] field, select “Activity”.
- c. Set up the following filter in the [*How to filter records?*] area: “Id = Read activity participant data.First item of resulting collection.Activity”.

Note. To set the “Id = Read activity participant data.First item of resulting collection.Activity” filter: click [*Add condition*], select the [*Contact*] column; click [*<?>*] and select [*Compare with parameter*] command; select the “Read activity participant data” element in the list to the left, and select the “Activity” column in the list to the right.

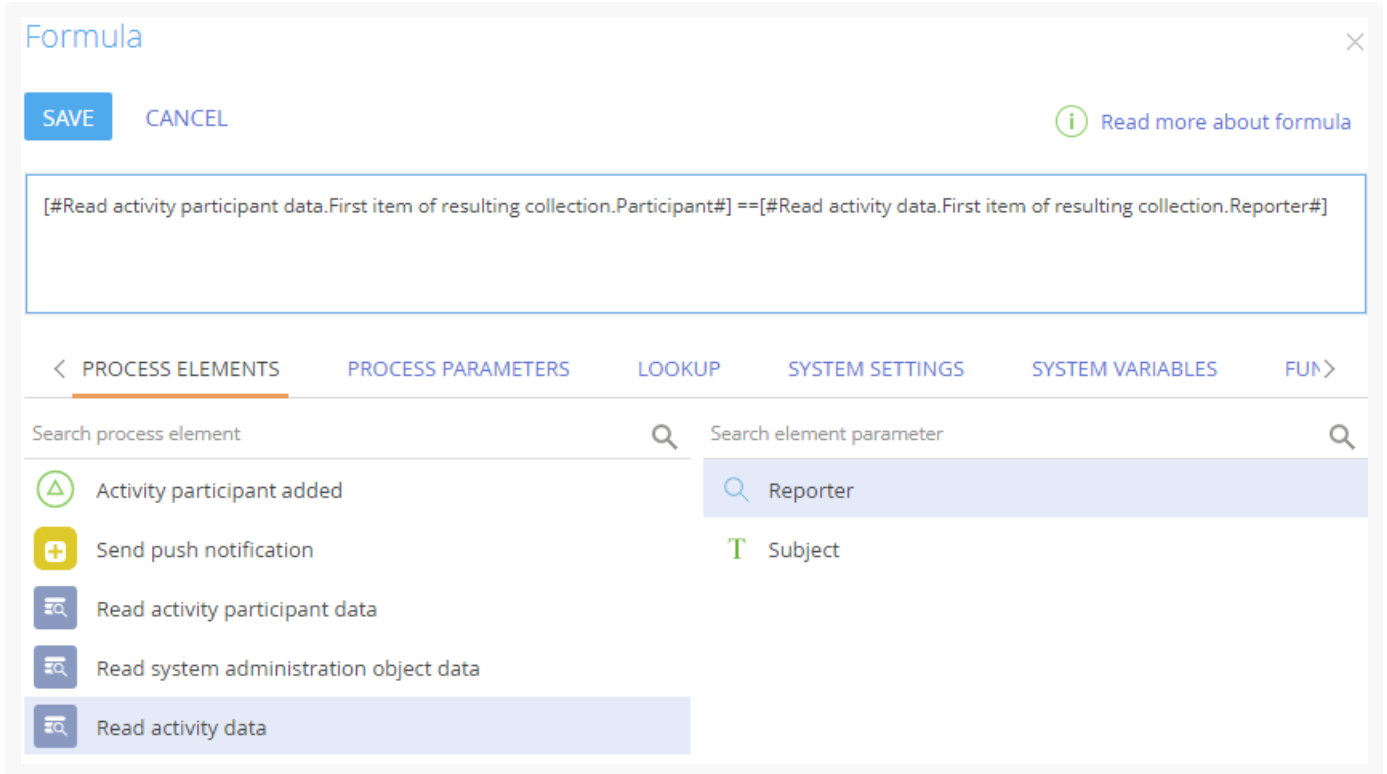
- d. In the [*What record data should the process read?*] field, select “Read data from selected columns only”.
 - e. Add the “Subject” and “Reporter” columns (the “Send push notification” process will use the “Subject” column as the title of the push notification and the “Reporter” column will be used in the conditional flow).
6. Set up the properties of the outgoing conditional flow (Fig. 6)

Fig. 6 Conditional flow



- a. In the [*Condition to move down the flow*] parameter, click ⚡ and select [*Process elements*]. In the [*Formula*] window, click the “Read activity participant data” in the list to the left and select [*Participant*] column in the list to the right.
 - b. Type “==” after the selected formula in the formula area.
7. Click the “Read activity data” in the list to the left and select [*Reporter*] column in the list to the right.
- As a result, the formula area will contain the following formula: “[*#Read activity participant data.First item of resulting collection.Participant#*]==[*#Read activity data.First item of resulting collection.Reporter#*]” (Fig. 7).

Fig. 7 Conditional flow formula



8. Set up the “Send push notification” sub-process to send notification to the user that was selected by the “Read system administration object data” element.
 - a. In the [*Related entity*] parameter, click ⚡ and select [*Lookup value*]. In the lookup window, select the “Activity” object.
 - b. In the [*Related record ID*] parameter, click ⚡ and select [*Process parameter*]. In the [*Select parameter*] window, click the “Read activity participant data” in the list to the left and select [*Activity*] column to the right.

Note. The [*Related entity*] (EntityUID) and [*Related record ID*] (RecordId) parameters of the “Send push notification” sub-process determine which record page will open when the user taps the push notification on their mobile device. For example, to open the activity page, we selected the “Activity” object as the value of the [*Related entity*] parameter, and mapped the [*Related record ID*] to the unique identifier of the activity record to open.

The [*Related entity*] (EntityUID) and [*Related record ID*] (RecordId) parameters are optional. If they are left empty, tapping a push notification will simply open Creatio mobile app.

As a result, when the business process is run, a push notification will be sent to the user, whose contact was added as the activity participant (Fig. 8).

Fig. 8 – A push notification in a mobile device

