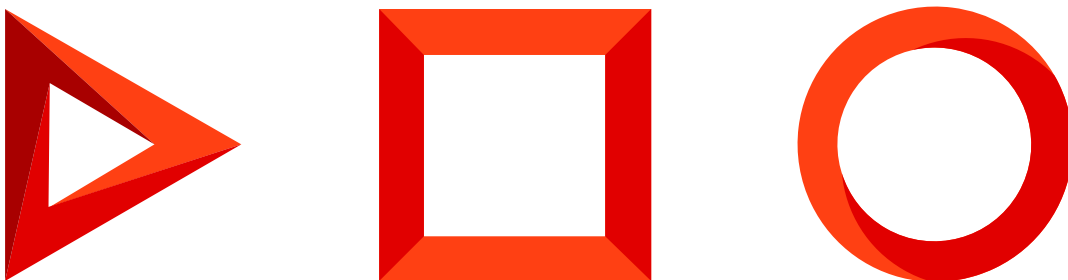


# Example Process

Set up a product selection business process

Version 8.0



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# Set up a product selection business process

PRODUCTS: **BANK CUSTOMER JOURNEY** **LENDING** **BANK SALES**

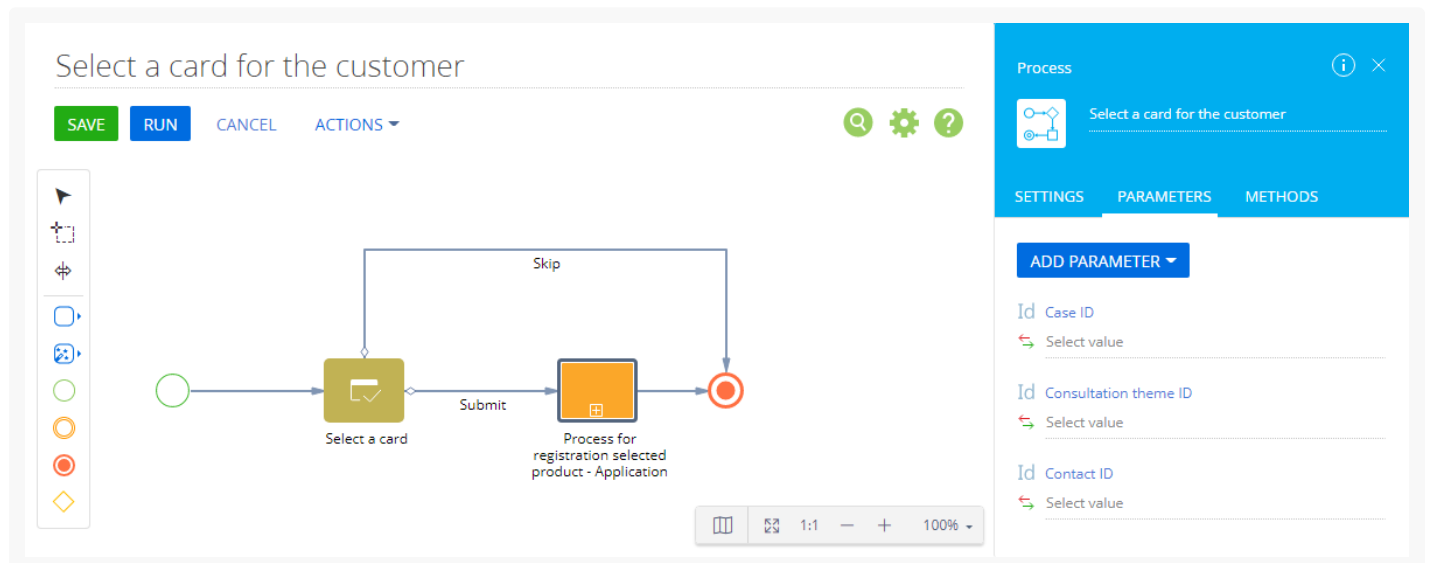
Automate product selection using custom business logic. For example, create a business process for product selection and sales and set it up to run from the consultation panel, an application case, or any other necessary location. Use a pre-configured “Product selection | ProductSelectionProcessPage” page to do this. In this case, Creatio will process the selection results based on the custom business logic regardless of the value of the “Process for registration selected product” (“SelectedProductRegistrationProcess” code) system setting. Therefore, when setting up a business process or case, set up the business logic for placing an application or opportunity as well.

**Example.** Create a business process for selling bank cards to contacts. The process includes selecting a product and submitting an application. It must be launched from the consultation panel.

To implement this example, a pre-configured process for submitting an application is required. Select the “Process for registration selected product - Application (Example)”, whose purpose is to help you to familiarize yourself with the product selection functionality.

## Step 1. Create a business process for consultation and bank card sales

Fig. 1 A bank card sales business process



1. Create a new business process from the process library. Learn more in the online course: [Model your first process](#).
2. Add parameters to the process to which to pass the unique identifiers of the consultation subject, contact, and application created as part of the consultation. To do this:


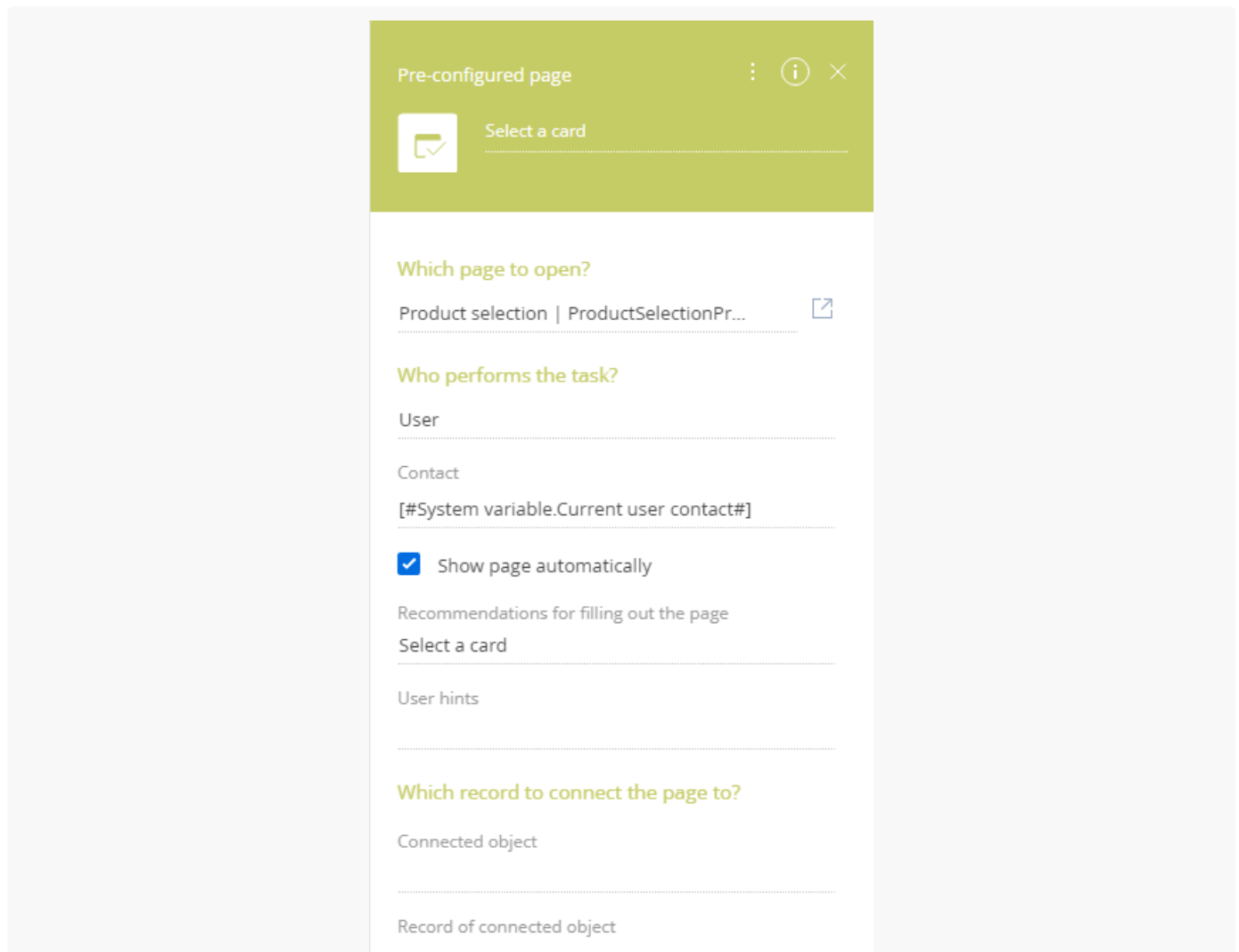
- a. Click  at the top right corner of the workspace.
  - b. Open the [ *Parameters* ] tab in the process setup area.
  - c. Click the [ *Add parameter* ] and select “Unique identifier.”
  - d. Fill out the parameter data:
    - a. [ *Title* ] - the parameter title to use in the business process.
    - b. [ *Code* ] - the unique code of the parameter that will help you to find it in the configuration settings.
    - c. [ *Data type* ] - the unique identifier. Creatio populates this value automatically.
    - d. [ *Direction* ] - bidirectional. This enables you to both pass data to the parameter and pass data from the parameter to the subsequent elements or other processes.
    - e. [ *Value* ] - leave empty. Creatio populates this field automatically for each process instance upon launch.
  - e. Repeat steps c through d for all parameters to add to the business process. Learn more: [Process parameters](#).
3. Select the [ *Pre-configured page* ] element in the [ *User actions* ] group and add it to the diagram. In this step, the customer assistant will see the product selection page. Set up the element properties (Fig. 2):

Fig. 2 The [ *Pre-configured page* ] element setup area



Pre-configured page

Select a card

**Which page to open?**

Product selection | ProductSelectionPr...

**Who performs the task?**

User

Contact

[#System variable.Current user contact#]

Show page automatically

Recommendations for filling out the page

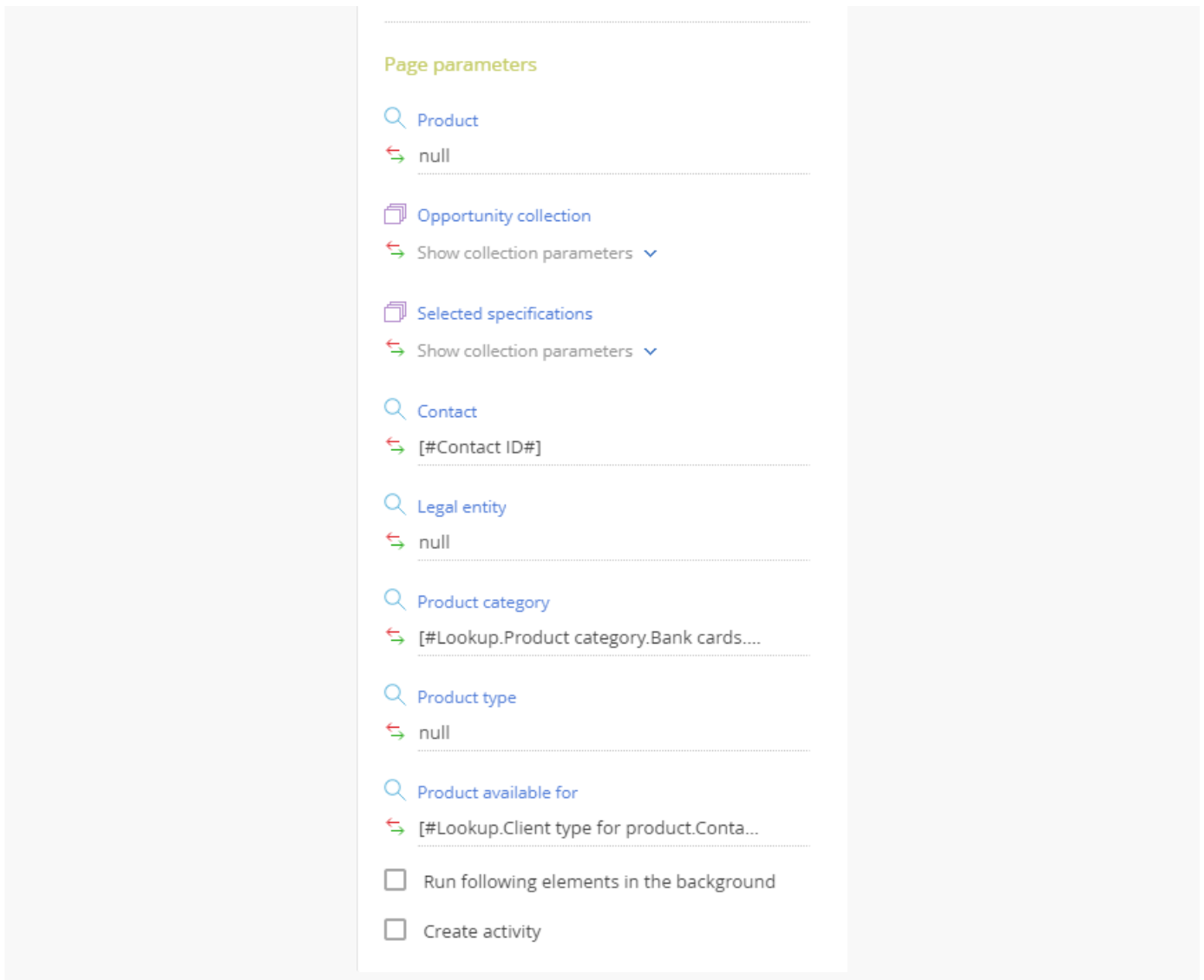
Select a card

User hints

**Which record to connect the page to?**

Connected object

Record of connected object

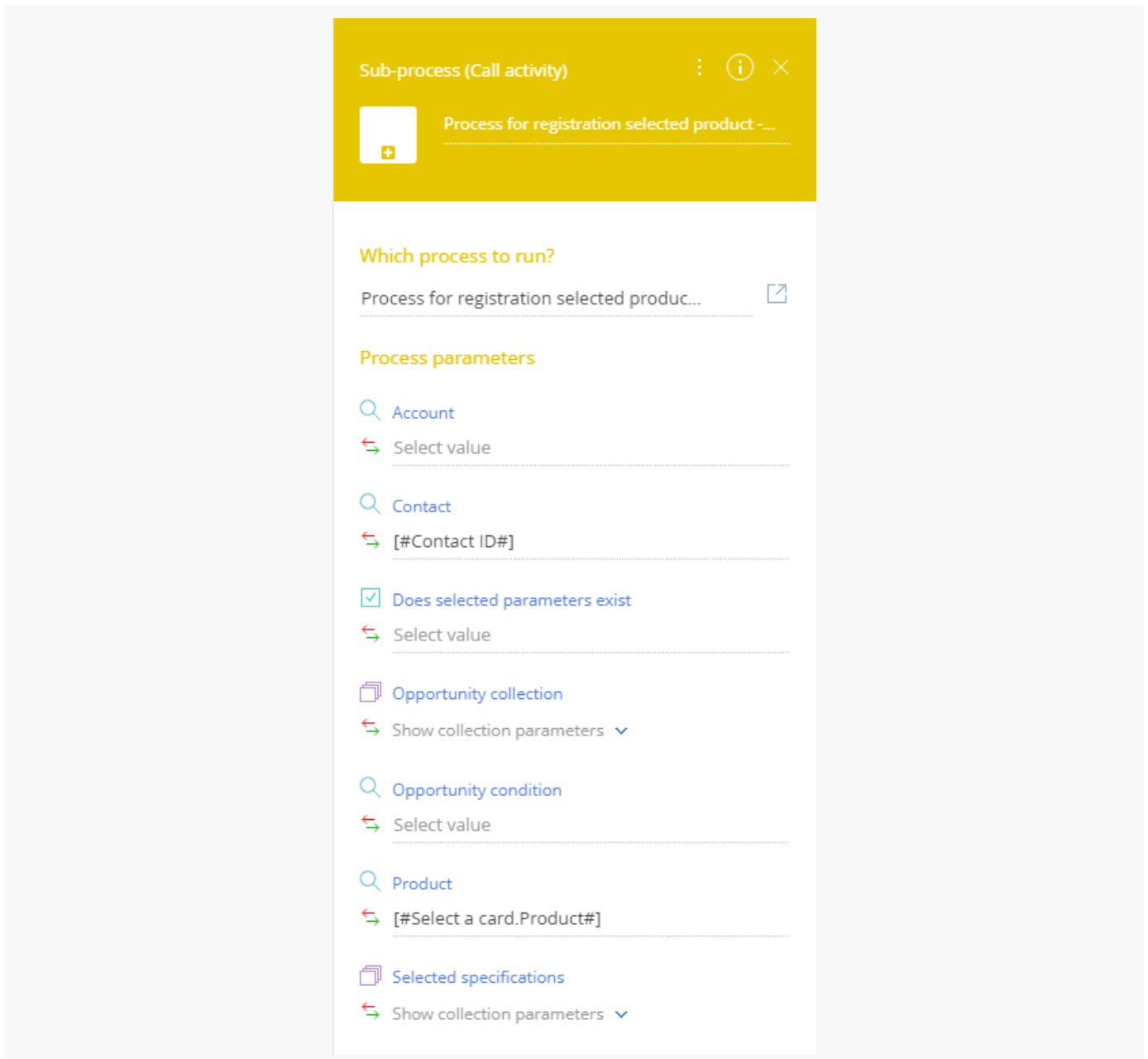


- [ *Which page to open?* ] - select "Product selection | ProductSelectionProcessPage" in the pre-configured page list. The page is available in Creatio version 7.18.1 and later.
- [ *Who performs the task?* ] - select "User" to make the pre-configured page open for a specific employee rather than a group or role.
- [ *Contact* ] - select "Current user contact" to open the page for the employee who runs the business process.
- [ *Show page automatically* ] - select the checkbox to display the page as soon as the user reaches this process step.
- Specify the consultation data in the [ *Page parameters* ] block. These parameters affect how the process will display the pre-configured page to the user.
  - Specify the value of the [ *Contact* ] parameter if you have recommendation prediction configured in Creatio and you want the pre-configured page to display Next Best Offers first. The value is passed from the process parameter. To do this, click ⚡ → [ *Process parameter* ] and select the existing process parameter with the contact ID. Otherwise, skip this step.
  - Specify the value of the [ *Product category* ] parameter to open the pre-configured page for the user on a specific catalog level. To do this, click ⚡ → [ *Lookup value* ], then select the value of the

corresponding catalog level in the [ *Product categories* ] lookup. For example, “Bank cards.”

- c. Specify the value of the [ *Product available for* ] parameter to display the pre-configured page with the selected filter. To do this, click ⚡ → [ *Lookup value* ], then select the required value in the [ *Client type for product* ] lookup. For example, [ *Contacts* ].
4. Add the [ *Sub-process (Call activity)* ] element on the diagram from the [ *System actions group* ]. In this step, Creatio will submit the application for the selected product. This step is required since Creatio will trigger the process specified in the “Process for registration selected product” (“SelectedProductRegistrationProcess” code) system setting only if the product selection page is opened from the action menu of the [ *Products* ] section. Otherwise, include the process for submitting an application in the configured business logic. Set up the element properties (Fig. 3):

Fig. 3 The [ *Sub-process (Call activity)* ] element setup area



- a. [ *Which process to run?* ] – specify a previously configured process for submitting an application to run in

case of a successful product selection. For example, “Process for registration selected product - Application (Example).”

- b. In the [ *Process parameters* ] block, fill out the list of product parameters and their values to pass to the application.
  - a. Specify the value of the [ *Product* ] parameter by passing it from the [ *Select a card* ] element. This will pass the selected product to the application. To do this, click ⚡ → [ *Process parameter* ] and select the [ *Select a card* ] element and its [ *Product* ] parameter.
  - b. Specify the value of the [ *Contact* ] parameter by passing it from the process parameter. This will pass the data of the consultation’s contact to the application. To do this, click ⚡ → [ *Process parameter* ] and select the existing process parameter with the contact ID.
5. Connect the [ *Pre-configured page* ] and [ *Sub-process (Call activity)* ] elements on the diagram using a conditional flow. Set the “Application” result of the [ *Pre-configured page* ] element as the flow’s condition.
6. Connect the [ *Pre-configured page* ] element and the termination event on the diagram using a conditional flow. Set the “Skip” result of the [ *Pre-configured page* ] element as the flow’s condition.

As a result, you will be able to use the process for selling bank products to the customers, from consultation to application.

## Step 2. Set up the process launch from the consultation panel

To run the process from the consultation panel, bind it to a specific consultation subject. For example, the “Bank cards” theme of the “Sell” theme block. Learn more about how to set up the consultation blocks and themes: [Set up the consultation panel](#).