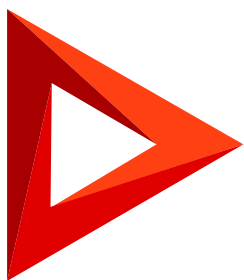


Overview

Creatio licensing

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

Creatio licensing	4
Add licenses to Creatio	4
Distribute licenses among users	8
Delete licenses from Creatio	11

Creatio licensing

PRODUCTS: **ALL CREATIO PRODUCTS**

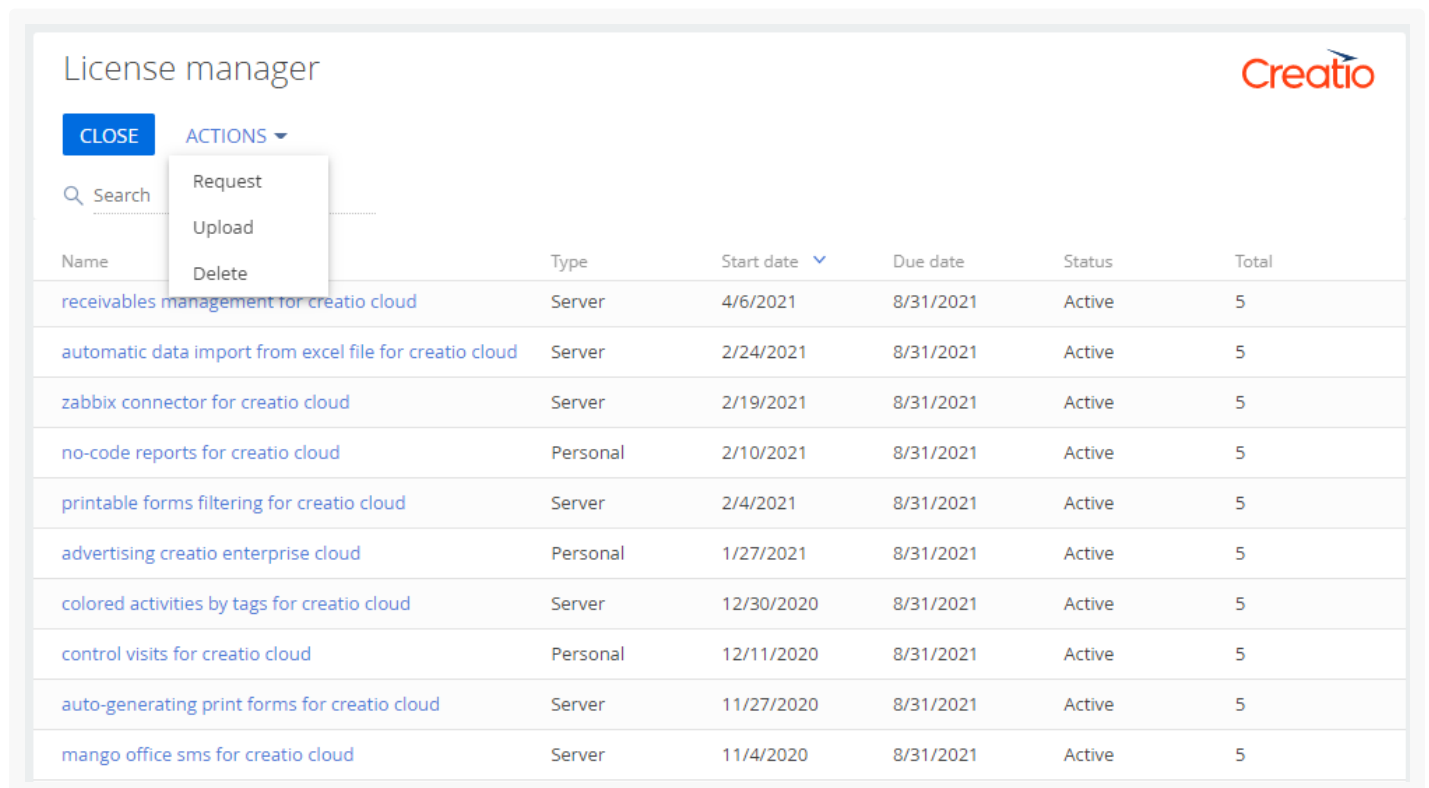
Only licensed users have access to Creatio functionality.

To **license Creatio**:

1. Add licenses to Creatio. [Read more >>>](#)
2. Distribute the available licenses among the user accounts. [Read more >>>](#)

Set up licensing in the [*License manager*] section (Fig. 1).

Fig. 1 The [*License manager*] section



Name	Type	Start date	Due date	Status	Total
receivables management for creatio cloud	Server	4/6/2021	8/31/2021	Active	5
automatic data import from excel file for creatio cloud	Server	2/24/2021	8/31/2021	Active	5
zabbix connector for creatio cloud	Server	2/19/2021	8/31/2021	Active	5
no-code reports for creatio cloud	Personal	2/10/2021	8/31/2021	Active	5
printable forms filtering for creatio cloud	Server	2/4/2021	8/31/2021	Active	5
advertising creatio enterprise cloud	Personal	1/27/2021	8/31/2021	Active	5
colored activities by tags for creatio cloud	Server	12/30/2020	8/31/2021	Active	5
control visits for creatio cloud	Personal	12/11/2020	8/31/2021	Active	5
auto-generating print forms for creatio cloud	Server	11/27/2020	8/31/2021	Active	5
mango office sms for creatio cloud	Server	11/4/2020	8/31/2021	Active	5

If the licenses expire, the license manager page will open for a user with the “System administrators” role automatically when they log in to Creatio.

Note. Viewing, distributing, and recalling licenses requires permissions to the “Manage user licenses” (the “CanManageLicUsers” code) system operation. Read more: [Set up system operation permissions](#).

Add licenses to Creatio


The licensing process is similar for all types of licenses used in Creatio.

When purchasing licenses, extending available licenses, and updating Creatio on-site:

1. Generate a license request file and send it to the Creatio technical support team.
2. The support team will send a file for you to upload to Creatio.

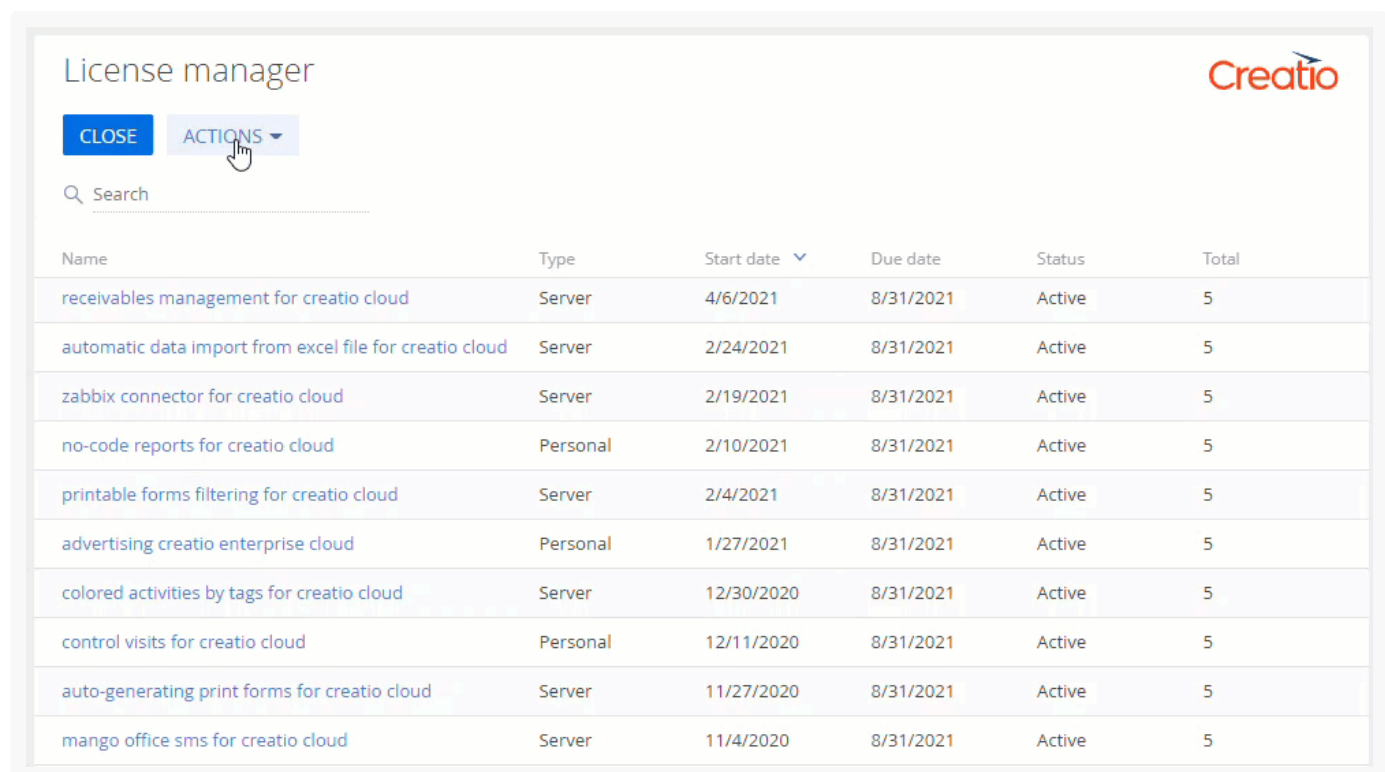
Starting from version 7.17.4, this procedure is also required when updating Creatio on-site.

Generate a license request

1. Click the  button to open the System Designer.
2. Click “**License manager**” under “Users and administration”.
3. Click [*Actions*] → [*Request*].
4. Enter the company Id for licensing. Creatio provides the Id after the purchase. Alternatively, request it from Creatio support.
5. Click [*Generate a license request file*] (Fig. 2).

This will generate a *.tlr license request file.

Fig. 2 Generating a license request



Name	Type	Start date	Due date	Status	Total
receivables management for creatio cloud	Server	4/6/2021	8/31/2021	Active	5
automatic data import from excel file for creatio cloud	Server	2/24/2021	8/31/2021	Active	5
zabbix connector for creatio cloud	Server	2/19/2021	8/31/2021	Active	5
no-code reports for creatio cloud	Personal	2/10/2021	8/31/2021	Active	5
printable forms filtering for creatio cloud	Server	2/4/2021	8/31/2021	Active	5
advertising creatio enterprise cloud	Personal	1/27/2021	8/31/2021	Active	5
colored activities by tags for creatio cloud	Server	12/30/2020	8/31/2021	Active	5
control visits for creatio cloud	Personal	12/11/2020	8/31/2021	Active	5
auto-generating print forms for creatio cloud	Server	11/27/2020	8/31/2021	Active	5
mango office sms for creatio cloud	Server	11/4/2020	8/31/2021	Active	5

6. For version 7.17.4 and later: fill out the [*License Version*] field with the Creatio version to which you are planning to update.
7. Send the license request file to Creatio technical support team. In response, the team will send you a file with the information about purchased licenses.

You can also request licenses from the [*System users*] section by clicking [*Request licenses*] in the [*Actions*] menu (Fig. 3).

Fig. 3 Generating a license request

The screenshot shows the 'Users' management page in Creatio. The interface includes a sidebar with navigation options and a main content area with a table of users. The 'ACTIONS' dropdown menu is open, showing options for user management.

User login	Active	Job title	Business phone	Name
SSPRegPortalUser	Yes			
Administrator	Yes			Administrator
a.wilson@alphabusiness.com	Yes	CEO	+1 212 542 4238	Alexander Wilson
Alice Phillips	Yes	CEO	+1 212 1440 5222	Alice Phillips
Portal user 1	Yes	CEO	+44 141 429 1595	Andrew Wayne
Caleb Jones	Yes	CEO	3010	Caleb Jones
Mandrill	Yes			Email Supervisor
John Best	Yes	Head of department	3030	John Best
j.anderson@yahoo.com	Yes	Head of department	+44 (15) 1542 4245	Jordan Anderson
Mary King	Yes	Sales manager	3020	Mary King
Megan Lewis	Yes	Sales manager	3070	Megan Lewis
Peter Moore	Yes	Head of department	3040	Peter Moore

Upload licenses to Creatio


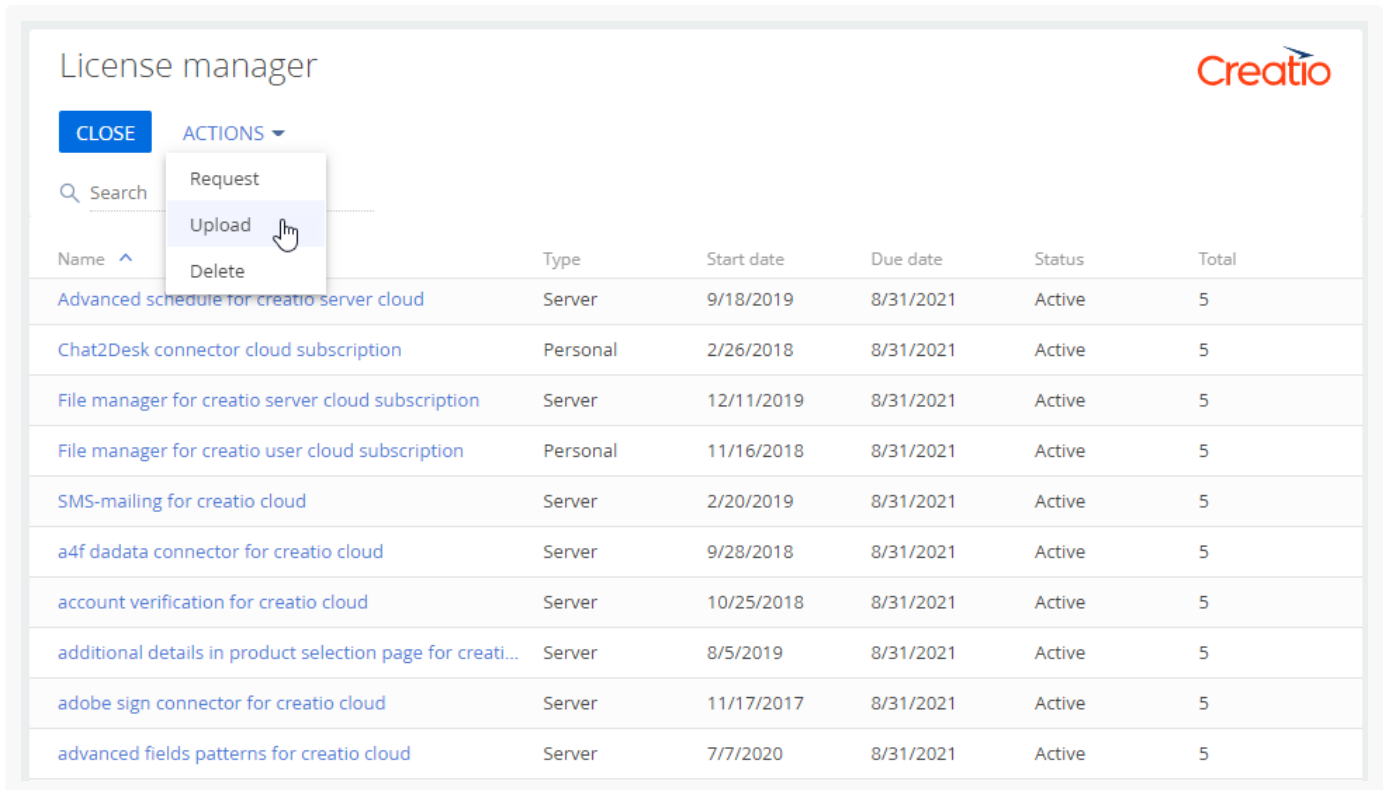
1. Save the license file received from the technical support team.
2. Click the  button to open the System Designer.
3. Click "**License manager**" under "Users and administration".
4. Click [*Actions*] → [*Upload*] (Fig. 4).

Fig. 4 Uploading a license file to Creatio



License manager

CLOSE ACTIONS

Request

Upload

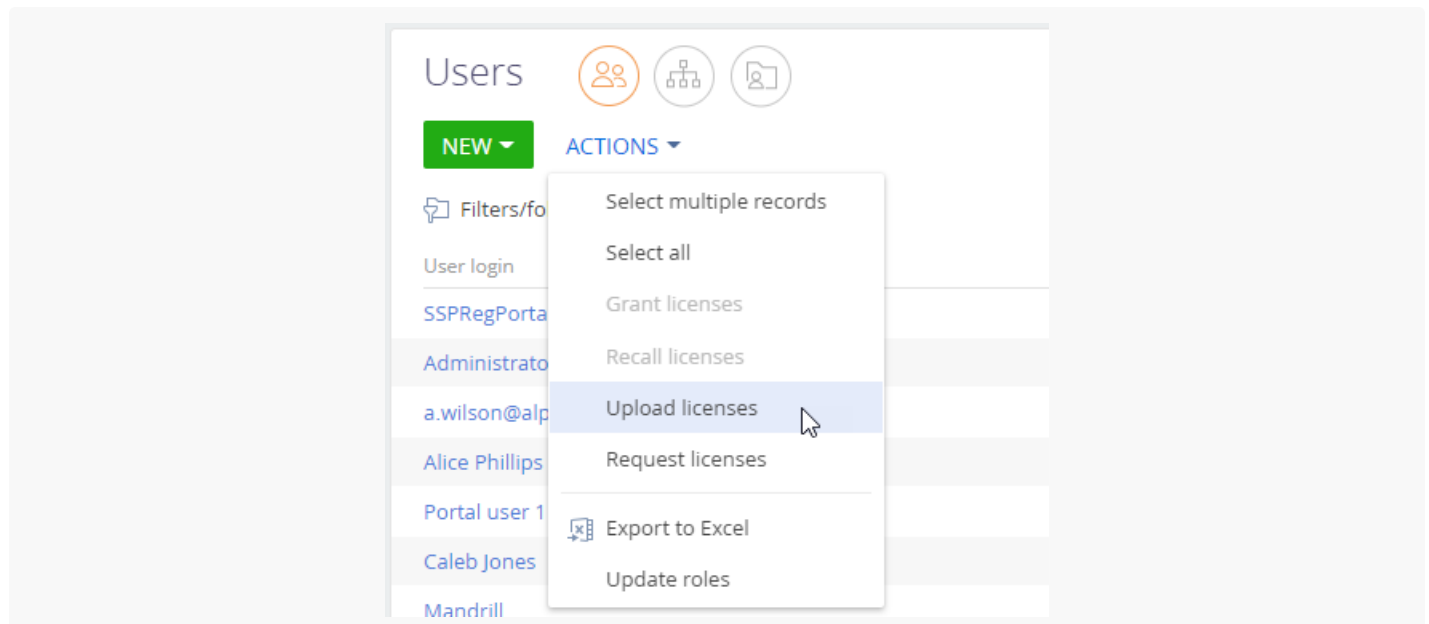
Delete

Name	Type	Start date	Due date	Status	Total
Advanced schedule for creatio server cloud	Server	9/18/2019	8/31/2021	Active	5
Chat2Desk connector cloud subscription	Personal	2/26/2018	8/31/2021	Active	5
File manager for creatio server cloud subscription	Server	12/11/2019	8/31/2021	Active	5
File manager for creatio user cloud subscription	Personal	11/16/2018	8/31/2021	Active	5
SMS-mailing for creatio cloud	Server	2/20/2019	8/31/2021	Active	5
a4f dadata connector for creatio cloud	Server	9/28/2018	8/31/2021	Active	5
account verification for creatio cloud	Server	10/25/2018	8/31/2021	Active	5
additional details in product selection page for creati...	Server	8/5/2019	8/31/2021	Active	5
adobe sign connector for creatio cloud	Server	11/17/2017	8/31/2021	Active	5
advanced fields patterns for creatio cloud	Server	7/7/2020	8/31/2021	Active	5

5. Specify the path to the license file you saved earlier.

You can also request licenses from the [*System users*] section by clicking [*Upload licenses*] in the [*Actions*] menu (Fig. 5).

Fig. 5 Uploading a license file to Creatio



Users

NEW ACTIONS

Filters/fo

User login

SSPRegPorta

Administrato

a.wilson@alp

Alice Phillips

Portal user 1

Caleb Jones

Mandrill

Select multiple records

Select all

Grant licenses

Recall licenses

Upload licenses

Request licenses

Export to Excel

Update roles

This will upload the new licenses to Creatio. The total license number may increase, and the available licenses will be extended.

Distribute licenses among users

To allow the new employees to log in or use specific functions, their user accounts must be licensed. A system administrator can redistribute the available licenses at any time. The number of active and available licenses is displayed on the product licensing page and depends on the license type (Fig. 6 and 7).

The following license types are available in Creatio:

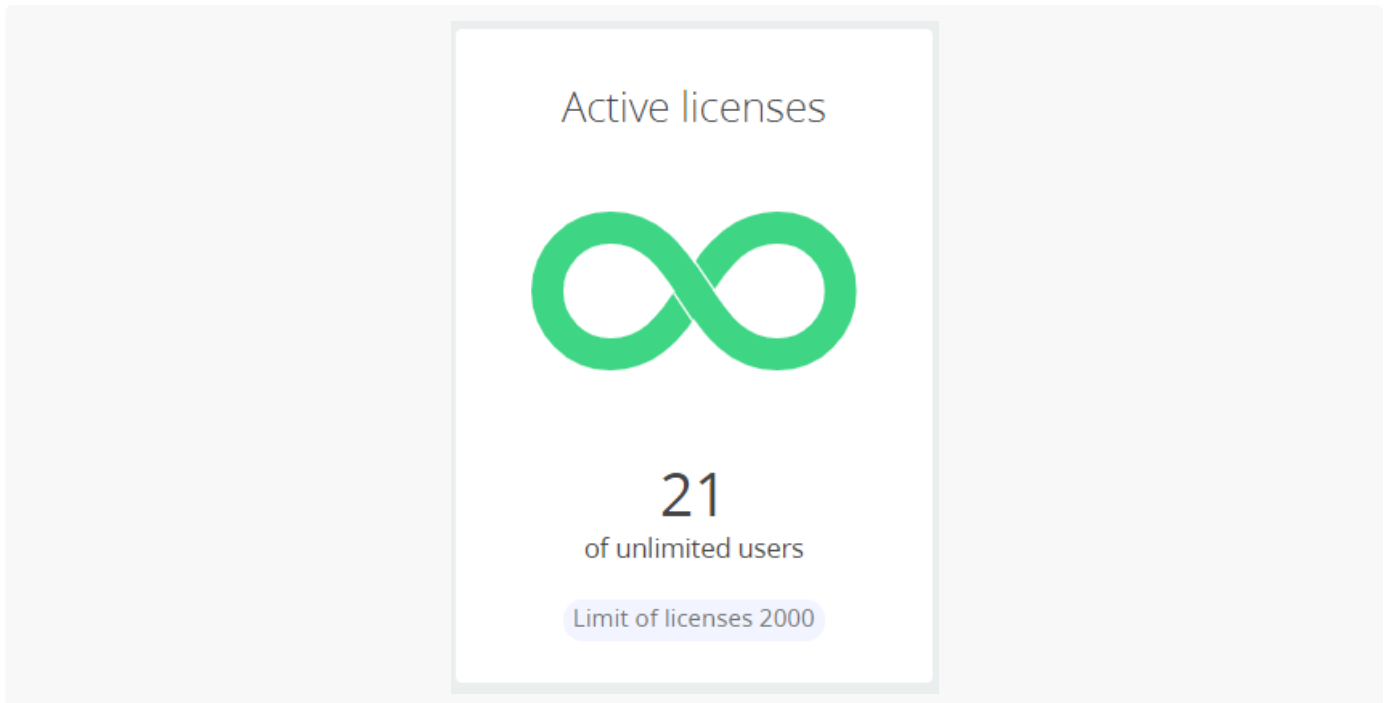
- **Personal licenses** provide access to the product for specific users. These licenses are linked to user accounts. When distributing personal licenses, make sure the number of provided licenses does not exceed the number of purchased licenses.

Fig. 6 The number of personal licenses.




- **Server licenses** provide access to additional Creatio functionality, for example, phone integration, to all users on the server. Unlike personal licenses, server licenses are not limited by the number of users.

Fig. 7 The number of server licenses



Distribute licenses in the [*License manager*] or [*System users*] sections. If you need to distribute licenses to several user accounts at once, use the [*License manager*] section:

1. Click the  button to open the System Designer.
2. Click “**License manager**” under “Users and administration”.
3. Select a license from the list. Use the search field and list sorting by columns to quickly find the needed product by name.
4. Click the product name.

The product licensing page will open. You can view the license type, the start and due dates, the status, the total number of available licenses, as well as distribute the available licenses among users on this page.

5. Click [*Add*] and select the users to whom you would like to issue licenses (Fig. 8).

Fig. 8 Adding users in the license manager

Product sales creatio enterprise edition cloud Creatio

[CLOSE](#)

Active licenses

11
of 50

Licensed

Licenses

Name ^	Type	Start date	Due date	Status	Total
sales creatio enterprise edition cloud	Personal	2/1/2016	8/31/2021	Active	50

Licensed users

Search

<input type="checkbox"/> User ^	Email	Job title
<input type="checkbox"/> Alice Phillips	alice.phillips@axiom.com	Managing Partner
<input type="checkbox"/> Caleb Jones	c.jones@yahoo.co.uk	Managing Director
<input type="checkbox"/> John Best	john_best_business@yahoo.com	Sales Department Manager
<input type="checkbox"/> Mary King	maryking.primary@yahoo.com	
<input type="checkbox"/> Megan Lewis	megan.lewis.business@gmail.com	Sales Manager
<input type="checkbox"/> Peter Moore	peter.moore@yahoo.com	
<input type="checkbox"/> S.Clarke	symon-clarke@yahoo.com	
<input type="checkbox"/> V.Murphy	valerie.murphy1980@gmail.com	Marketing Department Manager
<input type="checkbox"/> William Walker	william.walker.work@gmail.com	System Administrator

[+ Add](#)

Note that the number of licensed users should not exceed the number of available licenses. View the number of available/used licenses on the pie chart on the left (Fig. 8).

You can recall licenses to redistribute them among other users if needed.

6. To recall licenses, select users from the list and click [*Recall*] (Fig. 9).

Fig. 9 Recalling licenses

Licenses

Name ^	Type	Start date	Due date	Status	Total
sales creatio enterprise edition cloud	Personal	2/1/2016	8/31/2021	Active	50

Licensed users

Search

<input type="checkbox"/> User ^	Email	Job title
<input checked="" type="checkbox"/> Alice Phillips	alice.phillips@axiom.com	Managing Partner
<input type="checkbox"/> Caleb Jones	c.jones@yahoo.co.uk	Managing Director
<input type="checkbox"/> John Best	john_best_business@yahoo.com	Sales Department Manager
<input checked="" type="checkbox"/> Mary King	maryking.primary@yahoo.com	
<input type="checkbox"/> Megan Lewis	megan.lewis.business@gmail.com	Sales Manager

[+ Add](#) [Recall \(2\)](#)


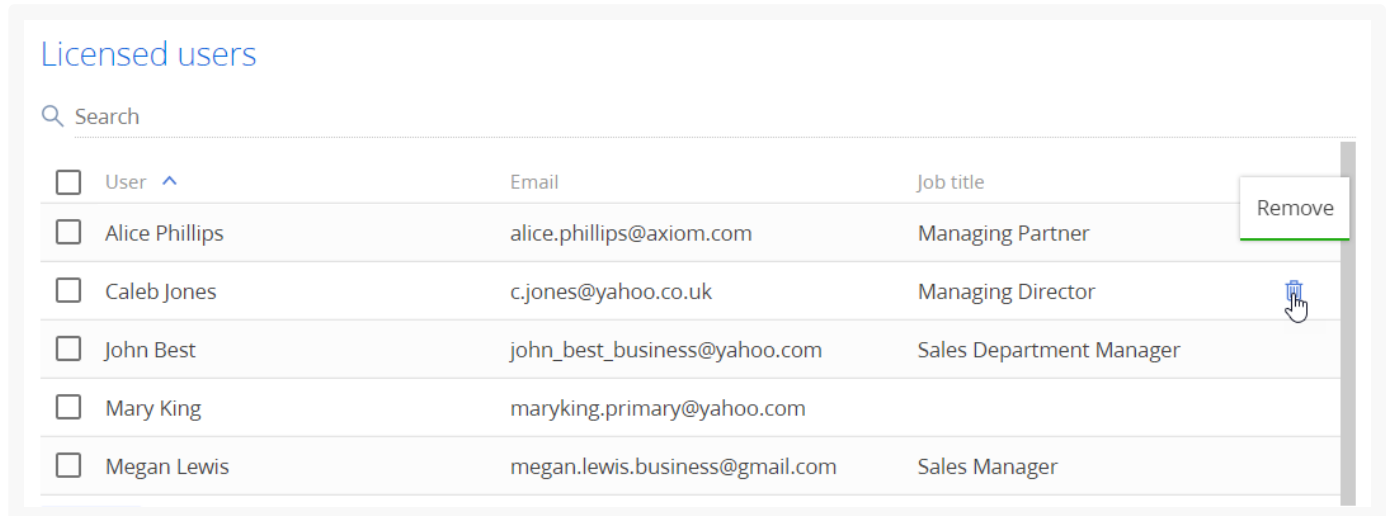

You can also hover over the names of users whose licenses you would like to recall and click the  button (Fig. 10).

Fig. 10 Recalling licenses



The screenshot shows a web interface titled "Licensed users" with a search bar. Below the search bar is a table with columns for "User", "Email", and "Job title". A "Remove" button is visible on the right side of the table. A mouse cursor is hovering over a trash icon next to the user "Caleb Jones".

<input type="checkbox"/> User ^	Email	Job title	Remove
<input type="checkbox"/> Alice Phillips	alice.phillips@axiom.com	Managing Partner	
<input type="checkbox"/> Caleb Jones	c.jones@yahoo.co.uk	Managing Director	
<input type="checkbox"/> John Best	john_best_business@yahoo.com	Sales Department Manager	
<input type="checkbox"/> Mary King	maryking.primary@yahoo.com		
<input type="checkbox"/> Megan Lewis	megan.lewis.business@gmail.com	Sales Manager	

7. Click [*Apply*] to save the changes.
8. Use the same procedure to distribute the available licenses for other purchased products.
9. Close the license manager window.

As a result, Creatio will distribute/recall licenses for the specified user accounts.

Delete licenses from Creatio

Sometimes, deleting licenses is required. For example, you need to switch Creatio to the demo mode.

To **delete licenses from Creatio**:


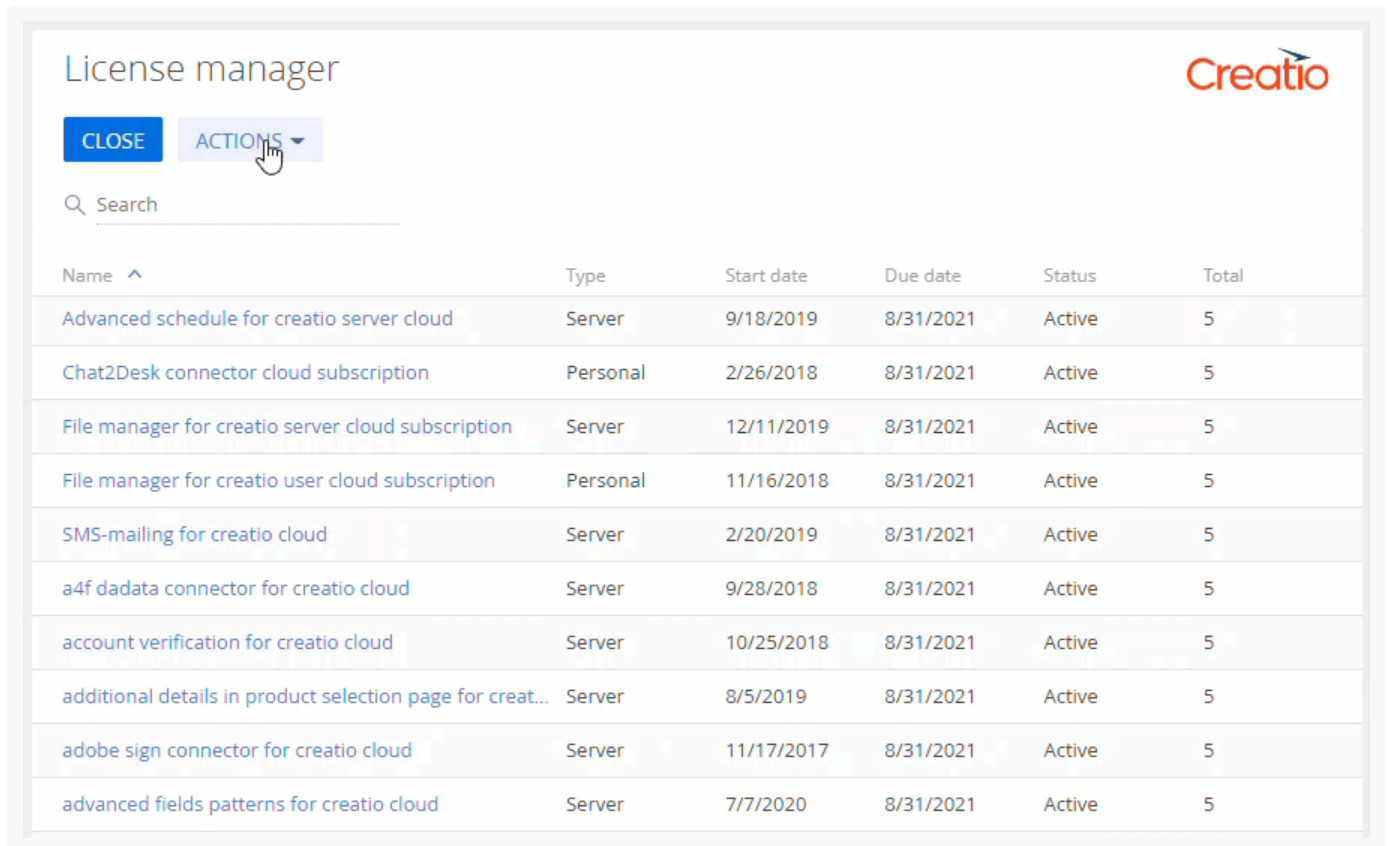
1. Click the  button to open the System Designer.
2. Click "**License manager**" under "Users and administration".
3. Click [*Actions*] → [*Delete*] (Fig. 11).

Fig. 11 Deleting licenses



Name ^	Type	Start date	Due date	Status	Total
Advanced schedule for creatio server cloud	Server	9/18/2019	8/31/2021	Active	5
Chat2Desk connector cloud subscription	Personal	2/26/2018	8/31/2021	Active	5
File manager for creatio server cloud subscription	Server	12/11/2019	8/31/2021	Active	5
File manager for creatio user cloud subscription	Personal	11/16/2018	8/31/2021	Active	5
SMS-mailing for creatio cloud	Server	2/20/2019	8/31/2021	Active	5
a4f dadata connector for creatio cloud	Server	9/28/2018	8/31/2021	Active	5
account verification for creatio cloud	Server	10/25/2018	8/31/2021	Active	5
additional details in product selection page for creat...	Server	8/5/2019	8/31/2021	Active	5
adobe sign connector for creatio cloud	Server	11/17/2017	8/31/2021	Active	5
advanced fields patterns for creatio cloud	Server	7/7/2020	8/31/2021	Active	5

As a result, Creatio will delete all licenses.