

Record pages

Work with record pages

Version 7.17



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Work with record pages

PRODUCTS: **ALL CREATIO PRODUCTS**

All information about the record is available on its edit page. Information can be displayed as a field or detail.

A **field** is an element displayed in the form of a certain value. The value can be specified in a textual, numeric, or logic format, in the format of date or time, and can also be selected from a list or a lookup.

When selecting values from a list or a lookup, the system will offer a list of records starting with the entered value after entering a few characters.

Similar fields can be grouped into field groups. You can minimize groups.

A **detail** is an element about other objects connected to the selected record. Details are implemented are used when the main record may be connected to more than one record object. For example, the information connected to activity contact, addresses, documents, etc.

Visually, a detail is different from a group field due to the presence of the toolbar for managing data (update and change records, sort, filter, configure details, etc)

The records in a detail can have their own edit pages.

Each record page consists of several blocks with structured details containing record data (Fig. 1). The page contains:

- Record profile
- Connected information profile
- Page tabs
- Dashboard tile if it was added to the page by the user
- Toolbar
- Workflow bar and action panel (depending on the section)

Fig. 1 A record page

Wilson & Young, Elizabeth Young

What can I do for you? >

SAVE CANCEL ACTIONS **QUALIFY** 6 VIEW >

Customer need* 1
Hardware
Registration method
Added manually
Created on
1/9/2016 7:09 PM

Account 2
Optimum Services
Web
www.optimumservice.co.uk
Industry
Business services
Category
B

Contact
Smith Christopher
Job title
CEO
Mobile phone
+44 (752) 254 7058

Qualification Distribution Handoff to sales Awaiting sale 3 Satisfied

NEXT STEPS (1) 4
Contact customer, specify need, budget, decision-making role.
5/13/2016 | John Best

LEAD INFO CUSTOMER NEED DETAILS HISTORY 5 >

Lead engagement
Channel Recommendation/person... Redirection website
Source Google AdWords Landing page
Registration method Added manually

Lead distribution
Owner Sales division Direct sales team

Handoff to sales
Opportunity owner Peter Moore Meeting date and time 5/12/2016
2:30 AM
Budget 35000.00 Decision date 5/12/2016
3:30 AM
Opportunity Order


Activities
Calls

Record profile (1)

The most important information about a record is displayed on the record page in the main sections of Creatio.

Connected record block (2)

Brief information about connected records, for example, client name, job title, and mobile phone number in the profile enables you to look through all the key data of the connected record on the page of the main record. A page can contain one or several profiles.

If the connected record in the profile is not specified, you can select it from existing ones or create a new record. You can delete a record connection by clicking  at the top right of the profile page.

Workflow bar (3)

In sections where records are maintained by a business process, a workflow bar is displayed. It enables you to see at what stage of the workflow a record is, and quickly move on to the next stage. This makes the case

intuitive and simple and helps you to focus on moving forward.

The bar color changes depending on the stage. For example, the workflow bar is colored red if the opportunity is moved to the [*Closed lost*] stage.






Note. Use the [Case Designer](#) to set up the workflow bar.

Action panel (4)

With the actions panel you can always see scheduled tasks and with just one click proceed to your activities, work with email or the feed. You don't need to leave the main section because all the work with activity takes place on the [mini page](#).

For sections that use business processes or cases, you can also work with a list of tasks that are scheduled automatically according to the process (case). You can, for example, approve a document (order, memo, etc.) right from the action panel. You can work with the case, communicate with a client, or follow the opportunity history and lead registration data at the same time.

Using the action panel, you can:

- Schedule a task .
- Send an email .
- Create a case in the self-service portal .
- Create a post in the record feed .
- Record call results .

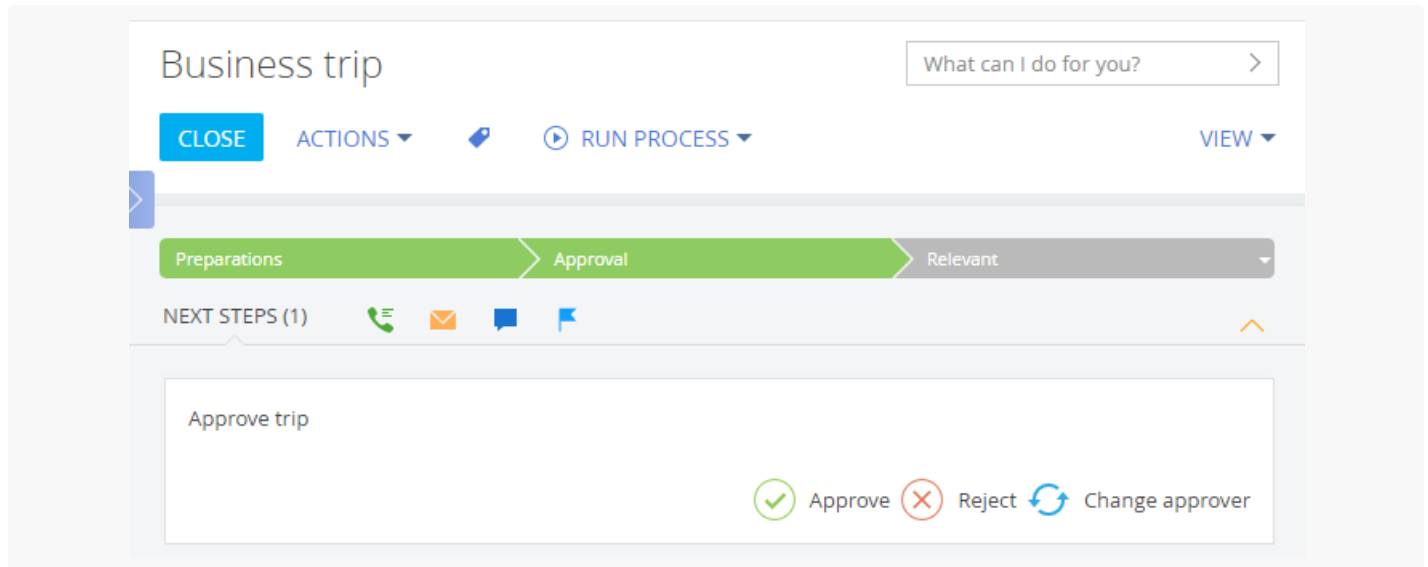
The action panel displays the following:

- Activities connected to a section object in a specific field. For example, in the lead action panel, only tasks that contain the selected lead in the [*Lead*] field are shown.
- Activities not in a final state.

Note. The activity is in its final state when the [*Final state*] checkbox is selected in the [*Activities states*] lookup.

- Approval in the “To set” status which is not canceled (Fig. 2).

Fig. 2 Approval on the action panel



The action panel can contain other business process elements, such as user dialogs and other pages that the process is supposed to open.

Page tabs (5)

Detailed information about the record is displayed on separate tabs. For example, the [*History*] tab contains the history of activities, calls, and messages, and information about connected records. The [*Feed*] tab contains user-published messages related to the record. These tabs contain fields, groups of fields, details, and dashboards.

Toolbar (6)

The toolbar contains buttons to perform actions with the record.

- You can **save** data, **cancel changes**, or **close the page** on the toolbar.
- The **Actions** button enables you to set access rights and subscribe to updates for a selected record. With the help of the action menu, you can also perform other tasks that depend on the section, for example, update a contact with social network data, create an order based on opportunity, or send an invoice or order for approval.
- The **Tags** button enables you to set tags to make searching more convenient and to group records.
- The **Print** button enables you to save information about a record in a separate file. Clicking the button opens a list of print forms and reports available in this section. The list of data, displayed in the printed form, depends on the section. After you select a report or a printed form, the information from the record page is stored in a separate file in PDF format.
- You can launch a process for the selected record by clicking the **Run process** button. The [*Run process*] button is enabled only if the start of the [business process for a section record](#) is configured.
- The **View** button opens the section wizard.

Page dashboards (7)

You can configure the displaying of [dashboard tiles](#) on any record page. A dashboard component displays the system data in various ways, for example, as a chart or a number. Adding of dashboard tiles on record pages is performed in the section wizard.