CREATIO ADMINISTRATION AND CUSTOMIZATION GUIDED LEARNING

Who should take this course: This guided learning course is intended for implementation consultants, CRM coordinators, business analysts and other users that are familiar with any Creatio product at end-user level and are looking to learn more about its customization capabilities.

What to expect: The participants will take part in a variety of learning courses on all topics listed below. Additionally, they will be able to apply their knowledge by completing practical assignments with the help of our trainer.

PREWORK: The participant must successfully complete the required e-learning courses before starting their guided learning:

- CREATIO BASICS
- CREATIO ADMINISTRATION AND CONFIGURATION
- BUSINESS PROCESSES MANAGEMENT IN CREATIO

Time	Topic
	DAY 1. ANALYTICS, USERS AND IMPORT
1,5 hours	**Setting up columns, dynamic groups and analytics** A variety of tasks related to system objects and their connections.
30 minutes	**Managing users and the organizational structure** Creatio user administration and management.
30 minutes	**Importing data from Excel** Data import from Excel using the built-in utility.

Time	Topic
	DAY 2. WIZARDS AND THE CONTENT DESIGNER
1 hour	**Section wizard** Using the section wizard to create and edit sections.
1 hour	**Detail wizard** Using the detail wizard to create and edit details.
20 minutes	**Content designer** Using the content designer to create and edit email templates.

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Time	Topic
	DAY 3. ACCESS PERMISSIONS, PRINTABLES, INTRODUCTION TO BUSINESS PROCESSES
1 hour	**Setting up access permissions to objects and operations** Access permissions to objects, sections and operations. Inheritance of access permissions.
1 hour	**Printables** Setting up printables using the MS Word plugin.
30 minutes	**Business process designer basics** The basics. Examples of simple business processes.

Time	Topic
	DAY 4. PROCESSES AND CASES
1 hour	**Case management** Creating cases. Various use examples in sections.
1 hour	**Business processes** Extended capabilities of the process designer. Common examples of practical use.
30 minutes	**Case management + Business processes** Examples of using business processes in cases. Connecting processes and cases.