Communications

Version 8.0

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Check notifications and process tasks

PRODUCTS: ALL CREATIO PRODUCTS

Click the 🔔 button in the communication panel to open the Creatio notification center. This section displays notifications about activities or invoices, comments to your records or mentions in a corporate social network, as well as system notifications. The number on the 🔔 button displays the total number of new messages in the notification center. Creatio displays the information messages on separate tabs:

- 🕐 – activity and invoice reminders created for you.

- 🔔 – notifications about events connected to your posts in the corporate social network. For example, you were mentioned in a post, received comments on your record in the feed, or somebody liked the record.

- ☑ – approval notifications. For example, pending contracts.

- 🎁 – notifications about the noteworthy events of contacts and accounts.

- ⓘ – system messages about completed actions in Creatio. For example, information about data import results.

Reminders and approval notifications are active until they are processed Feed notifications, messages about noteworthy events, and system notifications are considered read when you open the corresponding tab. The history of read notifications is stored on the tab for a month since their creation. Creatio does not add the read notifications to the tab count nor the common notification center count.

> **Note.** You can modify the storage period for read notifications in the "Notification storage period (days)" ("NotificationsExpirationTerm" code) system setting. The period is 30 days by default.

Pop-up notifications

Creatio displays the notification center's information messages in the browser **pop-up boxes**. The box is displayed only once when you receive the message. The notifications received after logging out of Creatio will be displayed in the pop-up boxes upon the next login.

> **Note.** Your browser may ask you for permission to display pop-up boxes. If you cannot see the boxes, check the browser settings.

Click the [x] button in the pop-up box to hide a notification. If you do this, Creatio will consider the notification unread and add it to the number of unread notifications on the corresponding tab.

Click the notification banner in the pop-up box to open the page for which the notification was sent.

Click the [*Notification settings*] button in your user profile and clear the [*Enable popups*] checkbox to **disable** pop-up notifications.

Reminders

Creatio displays all due reminders on a separate tab in the notification center. Go to the ⏰ tab to view the reminders. The number in the tab displays the total number of your active (unprocessed) reminders.

Create a reminder on the invoice or activity page by selecting the checkbox in the [*Reminders*] field group.

The reminders display **activities** of any category ("Meeting," "To do," etc.) that meet the corresponding criteria:

- You are the owner or the author of the activity.
- The activity has the "Not started" or "In progress" status.
- You or any other system user created a reminder about this activity for you.

The **invoices** that meet the following criteria are also displayed in the reminders:

- You are the owner of the invoice.
- The invoice has the "Draft," "Unpaid" or "Partially paid" status.
- You or any other system user created a reminder about this invoice for you.

The reminders include the title of the activity or the invoice number, the date, as well as the customer of an activity or an invoice. Creatio also displays a category icon for activities. For example, meetings or calls.

The key details in the reminder are displayed as hyperlinks. For example, click the task title to view its page.

Create a reminder

Create reminders for invoices and activities in the [*Reminders*] field group of the record page. To create a reminder for the activity:

1. Open the page of the relevant activity.
2. Select the checkbox in the [*Reminders*] field block:

    a. Select the [*Remind owner*] checkbox to create a reminder for the user specified in the [*Owner*] field of the page.

    b. Select the [*Remind reporter*] checkbox to create a reminder for the user specified in the [*Reporter*] field.

3. Specify the date and time when the user should see the reminder.
4. Save the record.

    If the activity is not completed, Creatio will display the notification in the notification center at the specified time for the user selected in the [*Owner*] or [*Author*] field.

Process reminders

The notifications on the ⏰ tab of the notification center are active until they are processed. You can cancel a reminder or postpone it. Process all reminders at once or separately.

Select the [*Postpone*] option from the menu and specify the period to **postpone a reminder** (Fig. 1). As a result, Creatio will remove the reminder from the list, and the number of unread reminders in the count will decrease. The reminder will be reactivated at the end of the specified period.

Fig. 1 Postpone a reminder
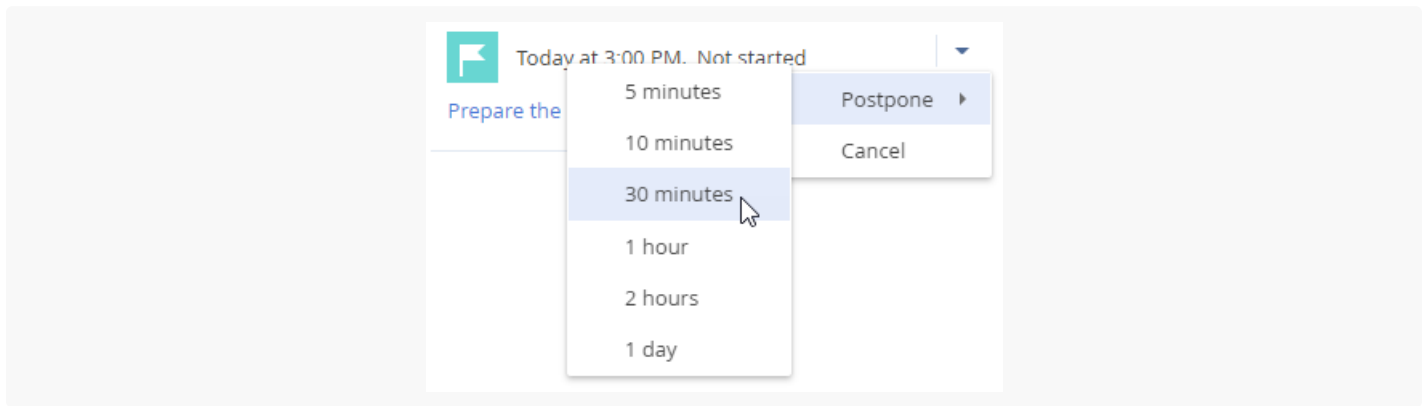
Select the [*Cancel*] option from the menu to **cancel a reminder** (Fig. 2). Creatio will no longer display the reminder in the notification center.

Fig. 2 Cancel a reminder
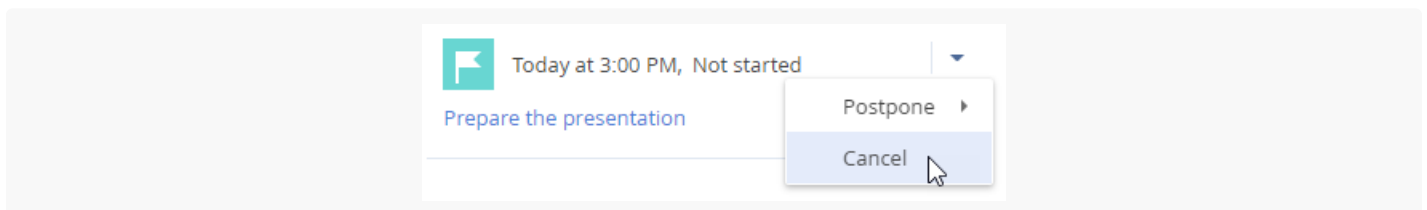
> **Note.** Creatio will cancel a reminder automatically if the activity reaches its final status, for example, "Completed," and the invoice reaches its final payment status, for example, "Paid."

Use the [*Postpone all*] or [*Cancel all*] option on the notification tab to **process all reminders** simultaneously.

Feed notifications

Creatio will display a feed notification if someone mentions you in a post, comments on your record in the feed, or likes the record. Creatio displays the feed notifications on the ⊠ tab in the notification center. The number on the tab displays the total number of unread feed messages.

The tab gives notifications about the following **events**:

- Someone commented on your record in the feed.
- Someone mentioned you in a post or a comment.
- Someone liked your post or comment.

After you open the tab, Creatio will mark all new notifications as read and remove them from the tab notification count. If you receive a new notification when the tab is open, Creatio will highlight the notification gray and add it to the notification count. Click a notification to mark it as read. As a result, the highlight will be removed.

Approval notifications

Use the ☑ tab of the notification center to receive information about records that need to be approved. For example, contracts. The notification tab displays the total number of records to be approved. The name of the notification corresponds to the record that must be approved. Notifications also display the date and time of submission for approval. Click the approval title to view the record page.

All notifications on the ☑ tab in the notification center are active until they are processed. You can approve the record, reject an approval, or delegate the approval to someone else. After the approval is processed, Creatio will remove the notification from the tab and update the notification count.

Process approvals using the approval actions menu (Fig. 3).

Fig. 3 The approval actions menu
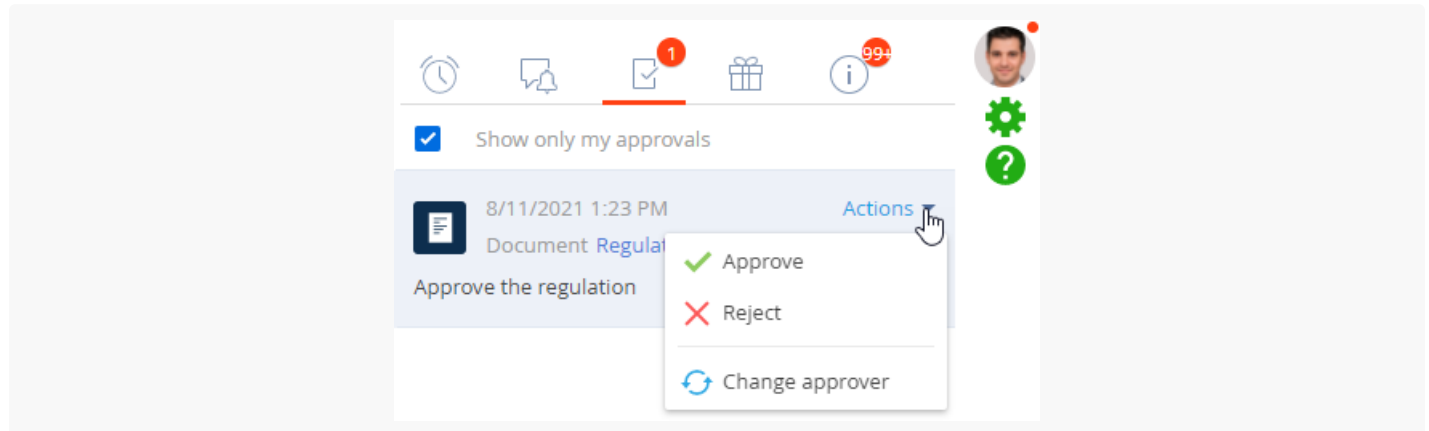
- [*Approve*] – sets a positive result for the approval.

  Note. By default, approval comments are optional. Edit the "Accept approval without comment" ("AcceptApprovalWithoutComment" code) system setting to make the [*Comment*] field required.

- [*Reject*] – sets a negative result for the approval.

If you choose to reject the approval, Creatio will open a pop-up box where you can enter your comments. For example, specify the rejection reason. The comment will be displayed on the approval page.

- [*Change approver*] – assigns a different user as the approver. This action opens a window where you can select the user or user group. Approvers can be changed only if the [*Approval may be delegated*] is selected for this approval in the Process Designer.

  Note. You can also process an approval using the [*Approvals*] tab or the action panel on the page of the required document.

Noteworthy event notifications

Creatio reminds you about upcoming noteworthy events of your colleagues and customers in the 🎁 tab of the notification center. That way you will never miss the customer's birthday or the partner company's foundation day. The tab count displays the total number of unread notifications about noteworthy events.

The tab displays notifications about **noteworthy events of contacts and accounts** from the current day through until the next two business days.

> **Note.** You can change the period for which Creatio will display the notifications in the "Noteworthy events notification period, days" ("NoteworthyEventNotificationPeriod" code) system setting. The period is two days by default.

The history of read noteworthy event notifications is stored on this tab for a month since their creation.

You will receive notifications for the following contacts and accounts:

- Contacts and accounts owned by you.

- Contacts of "Employee" type or those for whom "Our company" is specified as an account.

- The main contacts of the accounts owned by you.

- Contacts and accounts specified in the orders owned by you. The orders must have "Draft," "Confirmation," or "In progress" status.

- The contacts and accounts specified in opportunities owned by you (by the [Customer] field and the [Contacts] detail of the opportunity). Creatio will send notifications for opportunities that have not been closed yet as well as opportunities won during the last half-year.

> **Note.** You can change the period for won opportunities in the "Noteworthy event notification period for opportunity participants, months" ("NoteworthyPeriodForOpportunityParticipants" code) system setting. The period is six months by default.

- The contacts and accounts specified in activities owned by you (by the [Account] field and the [Participants] detail of the activity). The activity must have a "Not started" or "In progress" status.

The noteworthy event notification list is updated every 24 hours. If you are assigned as the contact, account, or opportunity owner, you will receive an upcoming event notification instantly.

Click the hyperlink in the notification to **view additional information** about a contact or an account. This will open a contact or account page. If you need to perform any action connected to the upcoming event, e. g. plan greetings, create a corresponding activity. To do this, select the [New task] option in the actions menu.

System messages

Creatio displays the system messages on the (i) tab. These messages do not require your attention. For example, they can be about successful Excel import, contact and account duplicates search results, or bulk email sending. System administrators will also see the license extension notifications on this tab.

The tab count displays the total number of unread system messages. If you open the tab, all system messaged will be considered read, and Creatio will reset the tab count. The history of read notifications is stored on the tab for a month since their creation.

Business process tasks

Keep track of the steps linked to a [business process](#) or a case owned by you from the [*Business process tasks*] tab on the communication panel. Click the ▤ button to view the business process step notifications. The counter of the ▤ button displays the total number of steps that require your attention.

The notifications display business process and case steps (also known as "user actions") that require your direct input. For example, complete an activity, send emails, edit records, fill out pre-configured pages, etc. The tab displays the steps that meet the following criteria:

- You are an owner of the step or have the role to which the task was assigned.
- The process step status is "Running."

By default, the tab displays notifications about the steps due through until the current day. Select the "Show future tasks" checkbox at the top of the notification panel to view all notifications.

If the task is assigned to a role, use the quick actions menu to:

- start processing the task
- assign the task to yourself to finish it later
- assign the task to another employee

If you have an open task page or a page that requires your direct input and a different user completes it, Creatio will display a corresponding notification in a dialog box.

Fig. 4 Process a group task on the communication panel
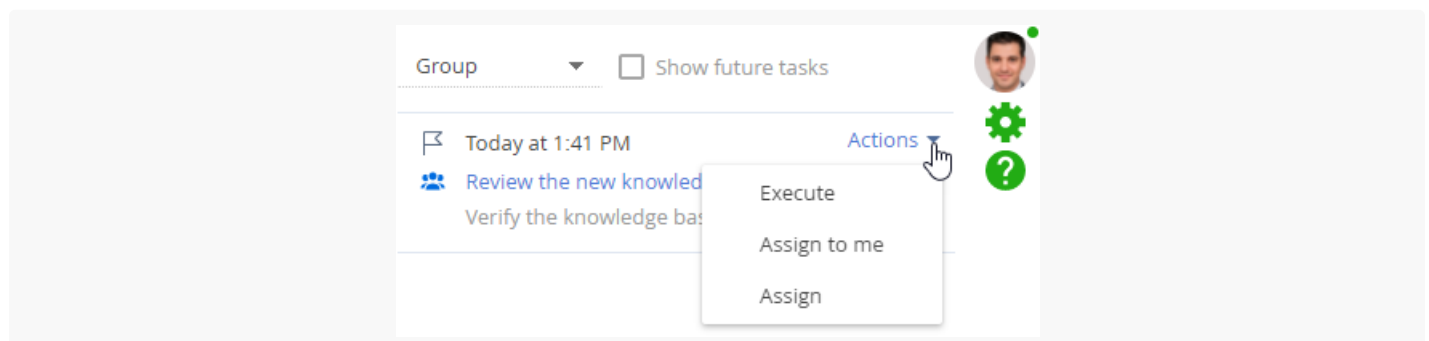
> **Note.** You can assign process tasks to other users or roles on the activity page as well. Learn more: [Complete process activities](#).

Edit the [*Process instance caption*] parameter in the [process properties](#) of the Process Designer to modify the business process title displayed in the notification.

Fig. 5 A business process task notification
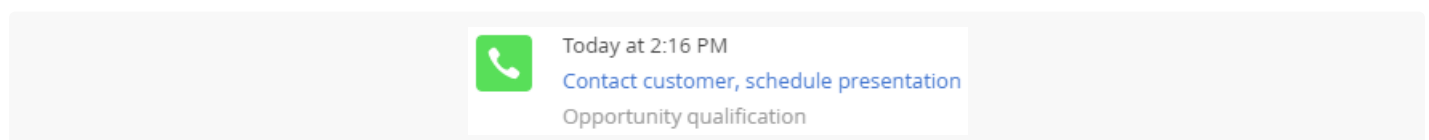
All notifications on the ▤ tab in the notification center remain active until they are processed. Click the process step title to open the corresponding page and start processing the step (Fig. 6).

Fig. 6 Navigate to a business process task from the task notification
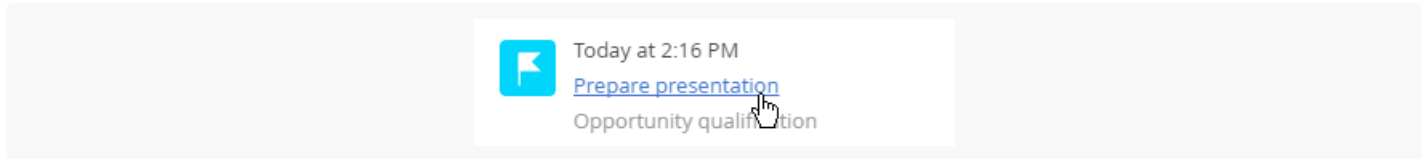
Enter the step results on this page. For example, fill out the required fields. If the process task is canceled or postponed, Creatio will update the corresponding notification automatically.

After the task is completed, Creatio will remove the notification from the communication panel. Once all business processes and case steps are complete, the counter on the button will reset.

Work with approvals

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Creatio enables the users to submit records for approval by other users who can choose to approve or reject the record. Approvals can be managed (approved or rejected):

- by a specific employee, for example, a department manager.
- by an employee of the specific role (user group), such as "Finance department," "Administration," etc.

Note. To submit one record for approval to several employees, create an approval for each of them.

By default the approval functions are available in the [Contracts], [Invoices], and [Orders] sections. You can enable approving in any section.

If someone has submitted a record for your approval, you can approve, reject or forward it to another employee. You can manage your pending approvals with the help of:

- The notification center on the communication panel.
- The [Approvals] tab on the section record page.
- The action panel of the record page.

Set up approvals

To set up approvals in a section:

1. Enable the approval function in the section wizard.

2. Set up approving process in the process designer or case designer.

1. Enable approvals in the section

1. Select the [Open section wizard] option from the [View] menu in the list of the corresponding section.

2. Select the [Enable approval in section] checkbox on the [Section] tab.

3. Save the changes. Saving may take some time.

As a result:

- The [*Approvals*] tab will appear on the section record pages (Fig. 1). You may need to refresh the record page to display the tab.
- A new tab will appear in the notification center for approvers where they can view pending approvals and process them. The [*Show only my approvals*] checkbox is enabled by default. Clear the checkbox to display your subordinates' approvals (Fig. 2).

Note. Enabling approvals in the section wizard will not automatically create a business process or case for approving. You will need to set up the process or case manually.

Attention. After enabling approving in section it is not possible to clear the [*Enable approval in section*] checkbox. If you do not use this function, delete the [*Approvals*] tab from the section page.

Fig. 1 The [*Approvals*] tab on the [*Documents*] record page.

Fig. 2 The approval notification tab

2. Set up the approval process

Depending on the specifics and complexity of your approval process, you can set up your approval sequence in:

- The Process Designer. Use this option if the approval process is complex and has several stages. The

behavior of the approval can be specified in the [*Approval*] business process element.

- The Case Designer. Use this option if the approval process is simple and has no complex conditions and transitions, or if it does not have a set sequence and is difficult to structure. The approval will be created automatically when a corresponding case stage is activated.

Approve records

Records can be approved in the notification center on the communication panel, the action panel of the record page, or the [*Approvals*] tab on the section record page.

To approve a record on the [*Approvals*] tab:

1. Open a record page in the needed section, for example, [*Accounts*].

   > **Note.** By default the approval functions are available in the [*Contracts*], [*Invoices*], and [*Orders*] sections. Adding the tab to another section can be performed in the section wizard.

2. Click the [*Approvals*] tab.
3. Select the required record on the [*Approvals*] detail, click ⋮ , and select [*Approve*] in the action menu of the detail.

Work with approvals

Use additional commands in the actions menu of the [*Approvals*] detail to manage approvals.

[*Show all approvals*]/[*Show active approvals*] – displays all approvals for the record, or only those for which the [*Canceled*] checkbox cleared. By default, it displays active approvals only.

[*Approve*] – sets the approval with a positive result. After you confirm the action, the approval status will be changed to "Positive."

> **Note.** By default, the approval comments are optional. You can make the [*Comment*] field required by editing the "Accept approval without comment" system setting (the "AcceptApprovalWithoutComment" code).

[*Reject*] – sets the approval with a negative result. Select this action to open an additional window for entering approval comments. After you confirm the action, the approval status will be changed to "Negative."

[*Change approver*] – changes the employee assigned as approver. The action is available for approvers if the [*Delegation permitted*] checkbox is selected for the approval and the [*Delegated from*] field is not filled in. This action opens a list of users and user groups that comprise the organizational structure of your company. The user selected in this list will be specified in the [*Approver*] field, and the current user will be specified in the [*Delegated from*] field.

[*Delete*] – deletes the selected approval. Requires administrator privileges. An approval can only be deleted after being approved/rejected by the approver or if it is canceled.

The [*Approve*], [*Reject*], and [*Change approver*] commands can be used for approvals in the "To set" status that are not canceled.

You can enable approval's email notifications in the properties of the [*Approval*] element in the business process or case.

Learn more about approvals in the mobile application in a separate article: Approve records.

Coordinate across multiple time zones

PRODUCTS: ALL CREATIO PRODUCTS

To efficiently communicate with customers and employees around the world, Creatio takes into account timezones of each contact.

This enables you to:

- Quickly identify the current local time of an employee or a customer when planning activities and communications.
- Synchronize employee and customer activities in different timezones, taking into account the time difference.

The current local time and time zone is displayed for all contacts and activities.

Check contact's local time

The current local time is displayed for each contact on the contact page in the contact profile and on the contact mini page.

To quickly view a contact's local time, hover your cursor over the contact's name in the list. A contact mini page will open, in which the contact's current time is displayed under the contact's photo.

- Time zone information, displayed on the contact mini page, includes:
- Contact's current time
- Country or city name (Fig. 1)

Fig. 1 Contact's local time, as seen on a mini page
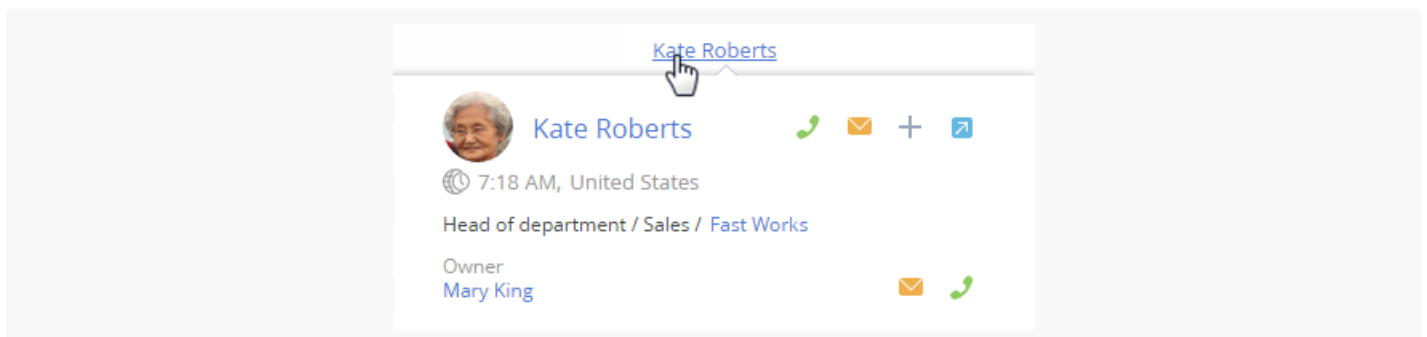
When you hover the mouse cursor over the time, the time zone is displayed.

Set the contact's time zone

To determine local time of a customer or employee, information from the [*Addresses*] detail of the contact

record page is used.

- The contact's time zone is automatically determined **by the city** specified in the [*Home address*] field, or the contact's **country of residence** if the [*City*] field is blank.

> **Note.** Cities are assigned to time zones in the [*Cities*] lookup. The countries have the same timezones as their capital cities. When adding new records in the [*Cities*] lookup, be sure to specify a time zone for each new city.

- If a contact record page has 2 addresses of "Actual" type, the address that was added last is used for determining the time zone. If no address of "Actual" type is specified, the **last added address** is used, regardless of its type.
- If no address is available on the contact page, the legal **address of the connected account** is used for determining the time zone. If a legal address is not specified for the connected account, then the time zone is determined by the last entered address of the account.
- If the contact is a registered system user, such as an employee, then the **user profile** data is used to determine the time zone.

> **Note.** If no information can be found in the system to determine contact's time zone, the time zone icons will look like this: .

Plan activities in a different time zone

Use the time zone function to plan tasks, calls and other activities with contacts in different time zones. The time zone function is available on the activity page and mini page. To plan an activity with participants in different zones:

1. Add a new record in the [*Activities*] section and add participants.
2. On the record page, or its mini page, click the button to specify the time zone, where the activity will be held. It can be your current time zone or the time zone of any of the participants.
3. Specify the activity time in the selected time zone.

   The system will automatically calculate the time difference and correctly plan the activity in both your and participant's calendar.

> **Note.** To calculate the time difference, use the time zone data specified in the user profile. If no time zone is specified in the user profile, the "Default TimeZone" system setting is used.

The system schedules activities in the local time of each participant. For example, if you want to schedule a call to a contact located in Los Angeles (UTC -8) for 10:00 a.m. Los Angeles local time, and you are located in New York (UTC -5), just specify the contact's local time. A new activity will appear in the calendar of your contact for 10:00 a.m. In your calendar, the activity will be scheduled for 1:00 p.m.

Work with emails

PRODUCTS: ALL CREATIO PRODUCTS

Email integration features in Creatio let you track the history of your cooperation with customers. The emails that you receive will be bound to other Creatio objects automatically. You can create and manage emails and run business processes by email directly in Creatio.

> **Note.** To receive and send emails in Creatio, you need to set up the email provider connection parameters, add an email account, and set up mailbox synchronization. Read more in the [Base integrations](#) guide.

Open the **email area** by clicking the ✉ button on the communication panel. The button counter displays the number of unread email messages.

At the top of the [*Email*] tab on the communication panel, you can see filters and buttons for managing emails (Fig. 1). You can:

- [create](#) a new email message
- [add](#) a new account and set up your mailbox
- [upload](#) emails to Creatio
- filter your emails, for example, display only the outbound or unprocessed email messages

Fig. 1 Filters and buttons for email management
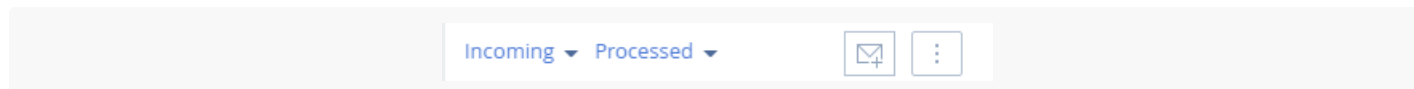
Email messages are displayed as a list. You can see the sender's data, time of sending, email subject, and the initial text in every email. At the bottom of each email, you can see the icons of all bound objects (Fig. 2).

Fig. 2 The bound email records on the communication panel
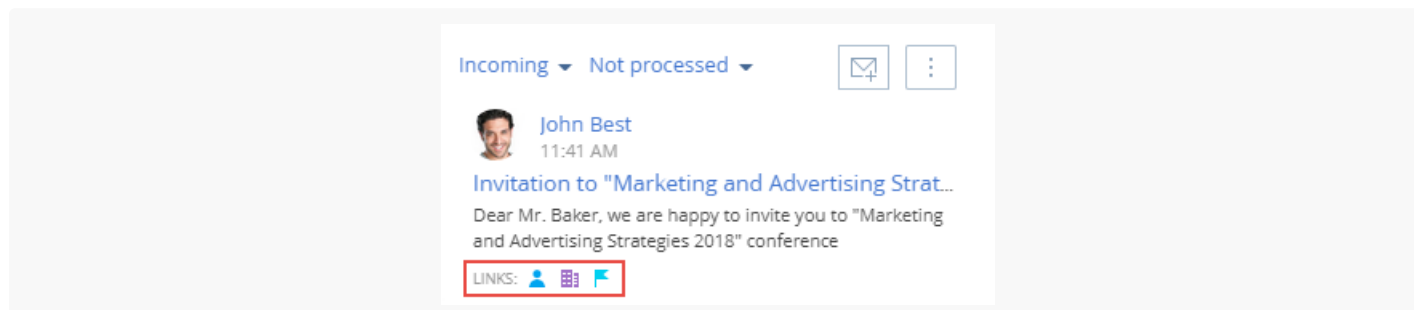
Send an email

1. Click the ✉ button in the communication panel.

2. Click the ✉ button to create an email.

3. Fill out the required fields on the email page:

   a. Select the mailbox to send the email in the [*From*] field. If you configured an email signature, it will be added to the text area.

   b. Specify the recipient's email.

   c. Click the [*Cc*] and [*Bcc*] buttons to display the [*Carbon copy*] and [*Blind carbon copy*] fields (optional).

   d. Specify the message subject.

   e. Enter the email body.

   f. Paste the image from the clipboard or drag the image to the email text to add an image to the email body (Fig. 3).

Fig. 3 Dragging the image to the email
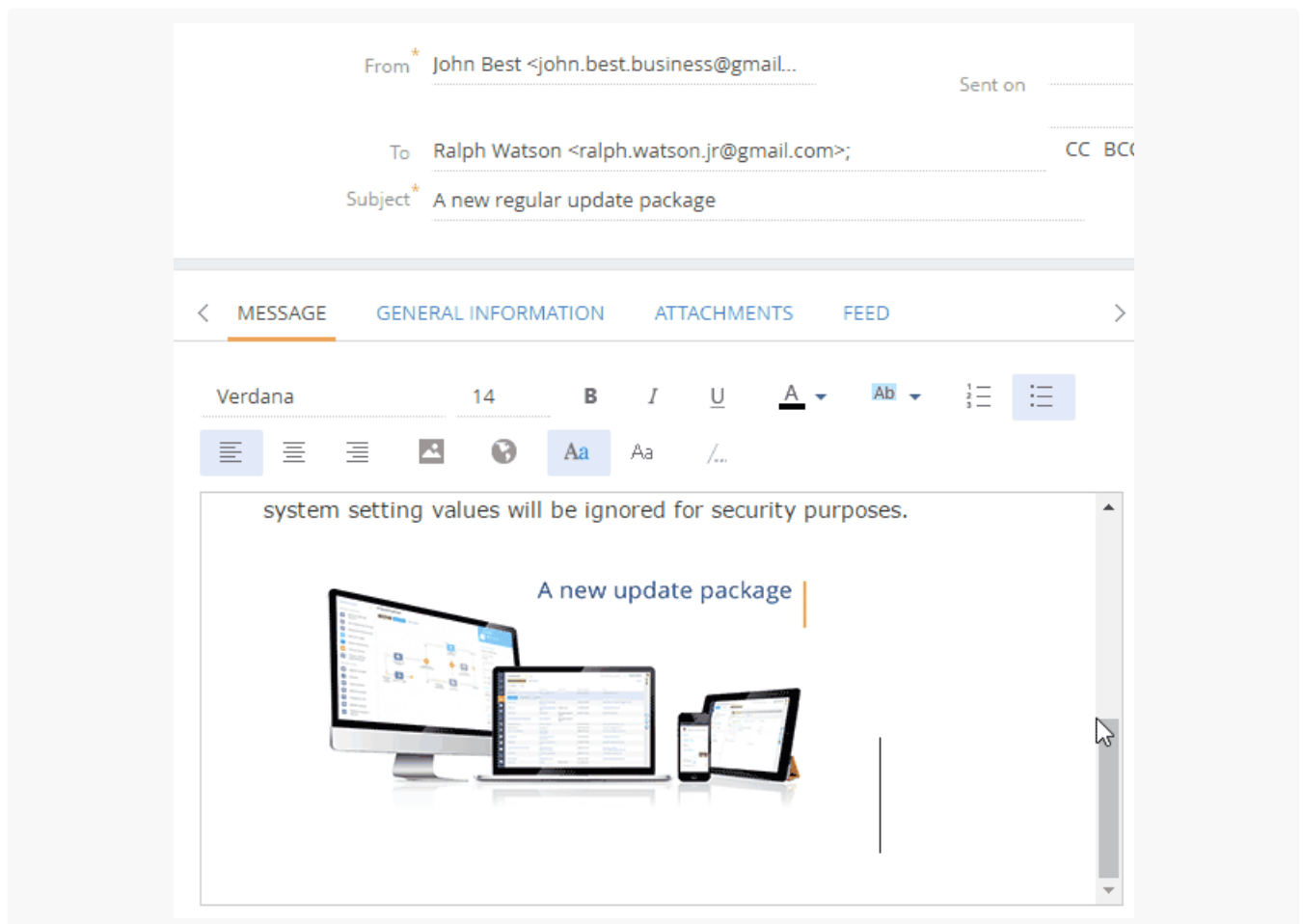
4. Click the [*General information*] tab.

   a. Fill out the standard activity fields (such as [*Show in calendar*], [*Start*], [*Due*], etc.) if the email must be displayed as a calendar activity.

   b. Fill out the corresponding fields in the [*Connected to*] field group if the email is bound to other Creatio objects, such as accounts and documents.

5. Click the [*Attachments*] tab of the email page to add an attachment.

a. Click the [*Add file*] button. This opens a box.

b. Select the file to attach in the box that opens.

> **Note.** By default, the maximum size of an attachment is 10 MB. You can change this value in the "Attachment max size" ("MaxFileSize" code) system setting.

6. Click [*Send*].

    As a result, the email will be sent from the mailbox specified in the [*From*] field to the addresses specified in the [*To*], [*Cc*], and [*Bcc*] fields. The email sending status will be changed to "Completed."

Send a template-based email

You can use email templates when sending emails using the ✉ action panel button. The [action panel](#) is available in several system sections, such as [*Contacts*], [*Accounts*], [*Leads*], etc.

To create an email based on a template:

1. Click the ✉ button on the action panel of a record page.

2. Fill out the needed fields ([*From*], [*To*], [*Subject*], etc.) in the email message area.

3. Click the [*/...*] button to open the template lookup instead of entering message text (Fig. 4).

Fig. 4 Select an email template
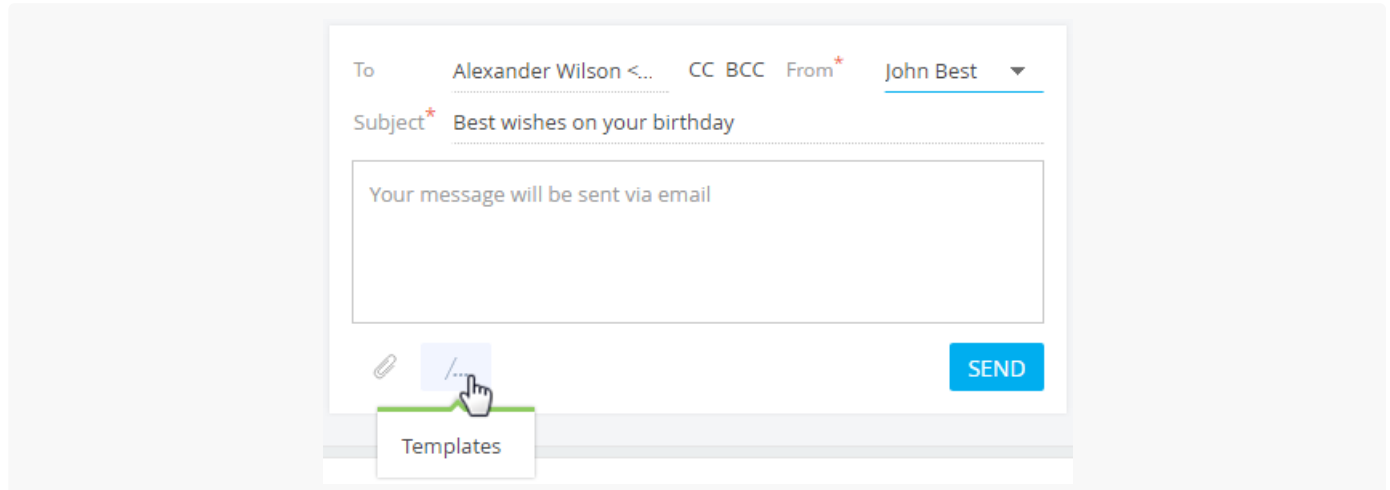
4. Select the needed template.

    The template list displays the records from the [*Email templates*] lookup. If you are creating an email from a contact page, the list displays only those templates that have the "Contact" specified as a source of macros, as well as any templates that have no source specified at all. The same applies to accounts, leads, etc.

    As a result, the text of the selected template will be added to the email. Macros, such as the recipient's name and the sender's name will be highlighted in the text.

5. Edit the template text if needed and click the [*Send*] button.

> **Note.** Email templates are available only when sending emails from the action panel. Email templates are

not available when creating a message through the communication panel, or from the [*Communication options*] detail on pages of certain Creatio sections.

You can add and modify templates in the [*Email templates*] lookup. The Content Designer is used for creating and editing email templates.

Receive emails

1. Click the [icon] button in the communication panel.
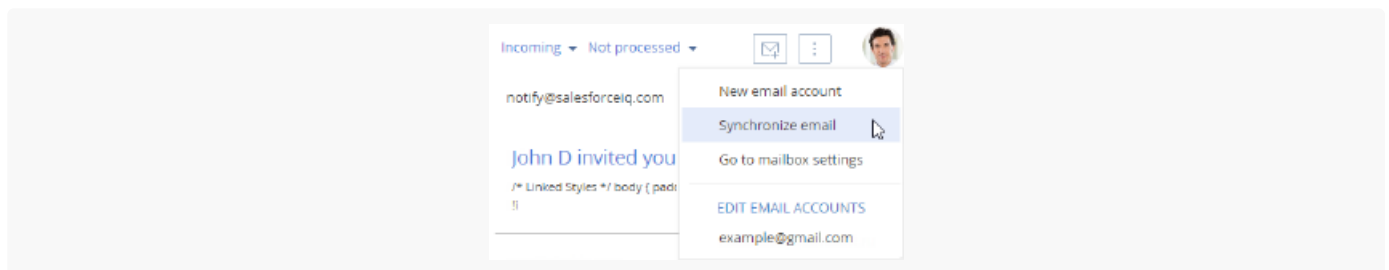
2. Select [*Synchronize email*] in the [⋮] menu (Fig. 5).

Fig. 5 Synchronize email

As a result, emails will be downloaded from the synchronized email server folders. Email attachments will be automatically added to the [*Files*] detail of the [*Attachments*] tab.

> **Note.** You can set up periodic synchronization of the email account using the synchronization setup page.

Each time an email is downloaded, Creatio automatically performs initial email processing:

1. The [*From*] field value is associated with the communication options of contacts and accounts registered in the system. If the match is found, the [*Account*] and [*Contact*] fields on the email page will be populated automatically.

2. If no match is found, the system analyzes the values in the [*To*], [*Cc*], and [*Bcc*] fields. Then, if the match is found, the [*Account*] and [*Contact*] fields on the email page will be populated automatically.

> **Note.** When matching the [*To*], [*Cc*], and [*Bcc*] fields with contact communication options, any contacts connected to Creatio user records will be ignored.

3. Creatio also verifies the **rules for binding emails to other Creatio objects**. Read more >>>

As a result, the user who loaded the email will be specified as the record's author and owner.

Process emails

An email is considered **processed** if either the [*Account*] or [*Contact*] is specified and at least one of the connection fields, for example, [*Opportunity*] or [*Contract*], is filled out.

Note. Emails in which the [*Contact*], [*Account*], and [*Case*] fields were automatically populated are not processed.

When uploaded, the emails are processed **automatically** according to the email binding rules.

Note. An email is considered processed if the [*Needs processing*] checkbox on the email page is cleared. The checkbox is selected/cleared automatically.

The emails that were not processed automatically require **manual** processing.

1. Display the unprocessed emails by selecting the [*Not processed*] filter (Fig. 6).

Fig. 6 Filter emails
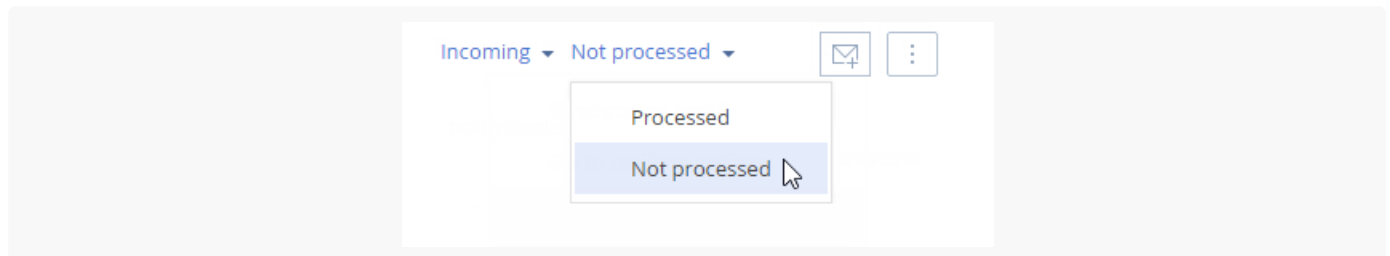
2. Select the email to process (Fig. 7).

Fig. 7 Select an unprocessed email
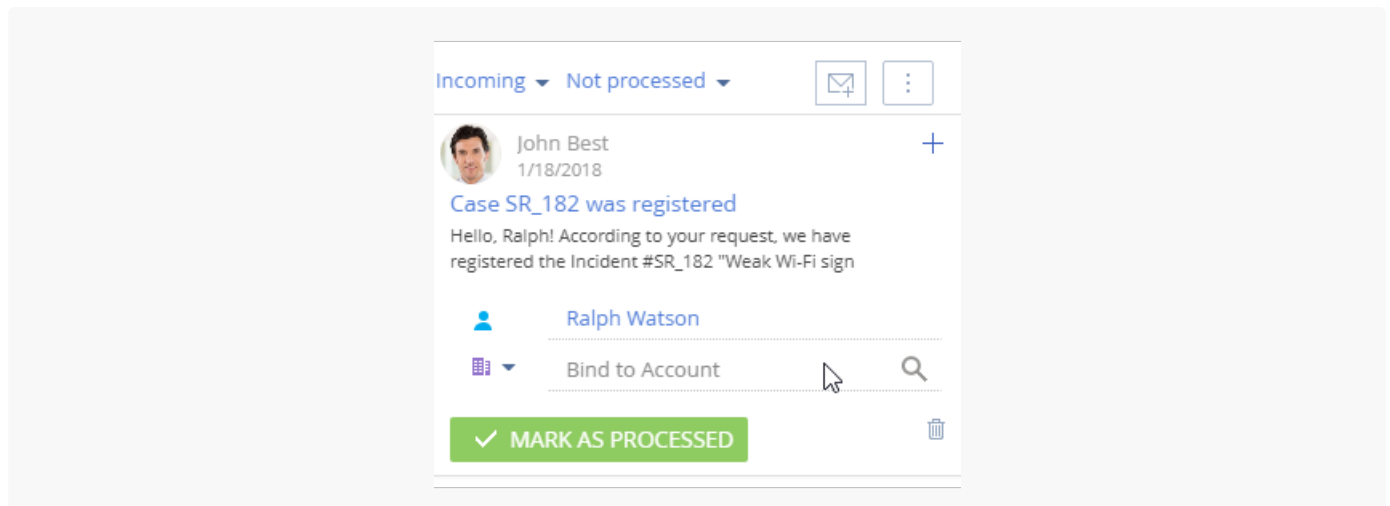
3. Bind an email to Creatio records. Learn more about the manual binding of emails to Creatio records in the Link emails to existing records article

4. Click the [*Mark as processed*] button. If the email that you processed is part of an email thread, Creatio will offer to process all emails in the thread.

   As a result, this email or email thread will no longer be displayed in the list of unprocessed emails and the [*Needs processing*] checkbox on its page will be cleared. To view the list of processed emails, select the [*Processed*] filter in the filter area.

Run a business process by an incoming email

You can set up the list of business processes involved in email management. For example, if a customer expresses interest in your products in his email, a new lead has to be created, if the email contains a request or a question, the system has to register a case.

> **Note.** Detailed descriptions of the business process automation are available in the Creatio business process documentation.

To run a business process by email:

1. Click the ✉ button on the communication panel.

2. Select the email to run the business process by.
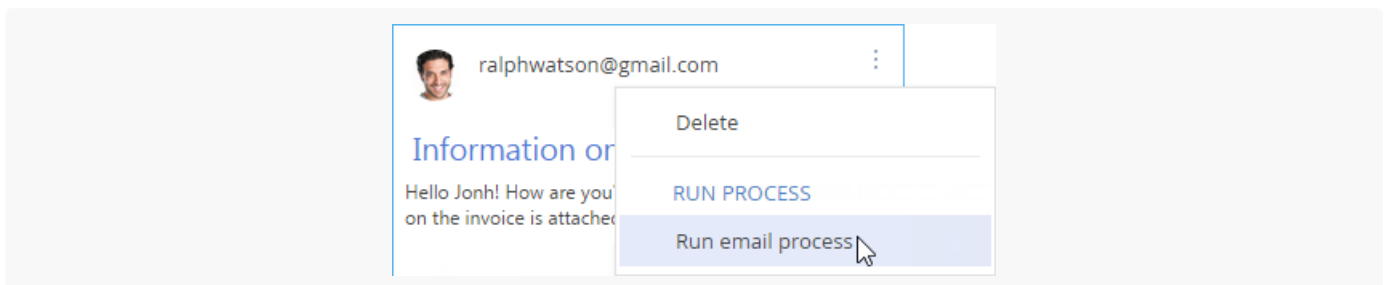
3. Select the process to run by the current email from the ⋮ menu (Fig. 8).

Fig. 8 Run a process by email

As a result, the business process will be run by the selected email.

> **Note.** To display the business process in the ⋮ menu of the email, add the "Email Process" tag, as well as a parameter with the "RecordId" code and the [*Unique identifier*] data type in the business process parameters (see business process documentation for more information).
>
> You can change the tag using the "Email processes tag" ("EmailProcessTag" code) system setting.

Add records based on emails

You can create a new record in any Creatio section based on an email message from the communication panel. For instance, you can add a new contact based on an email from an unknown sender. His email address and name will be automatically filled in on his edit page with the data from the linked email message. If you add another record (i. e., an opportunity, invoice, or an order), Creatio will automatically populate its corresponding fields on the contact page with the corresponding data from the email message. For instance, when you create a new opportunity, the [*Customer*] field on the opportunity page will contain the name of the account or contact.

To create a new contact record based on an incoming email:

1. Click the ✉ button in the communication panel.

2. Select an email message.

3. Click the + button in the top right corner of the email message and select the [*Add new*] command (Fig. 9).

Fig. 9 Add a new record based on an email message in the communication panel
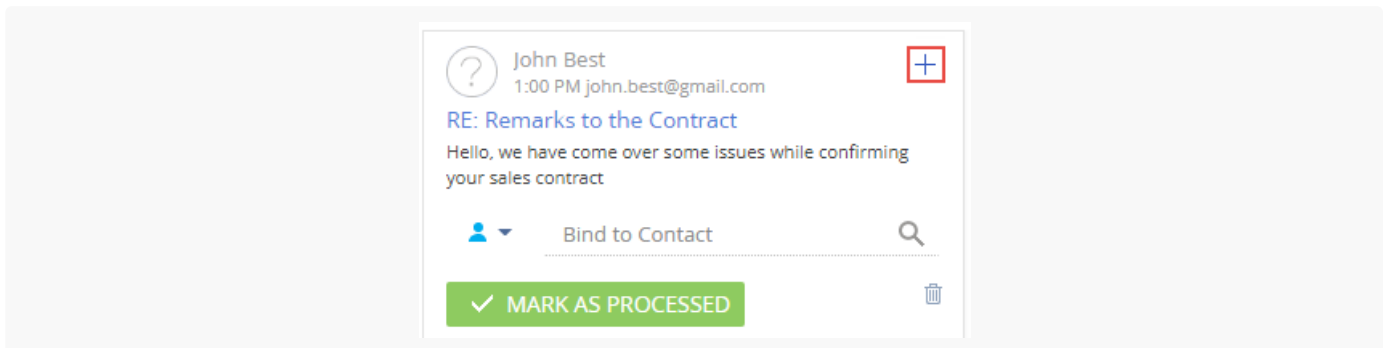
4. Select an object (the type of Creatio record to create) from the menu, for example, "Contact" (Fig. 10).

Fig. 10 Select the type of Creatio record to add
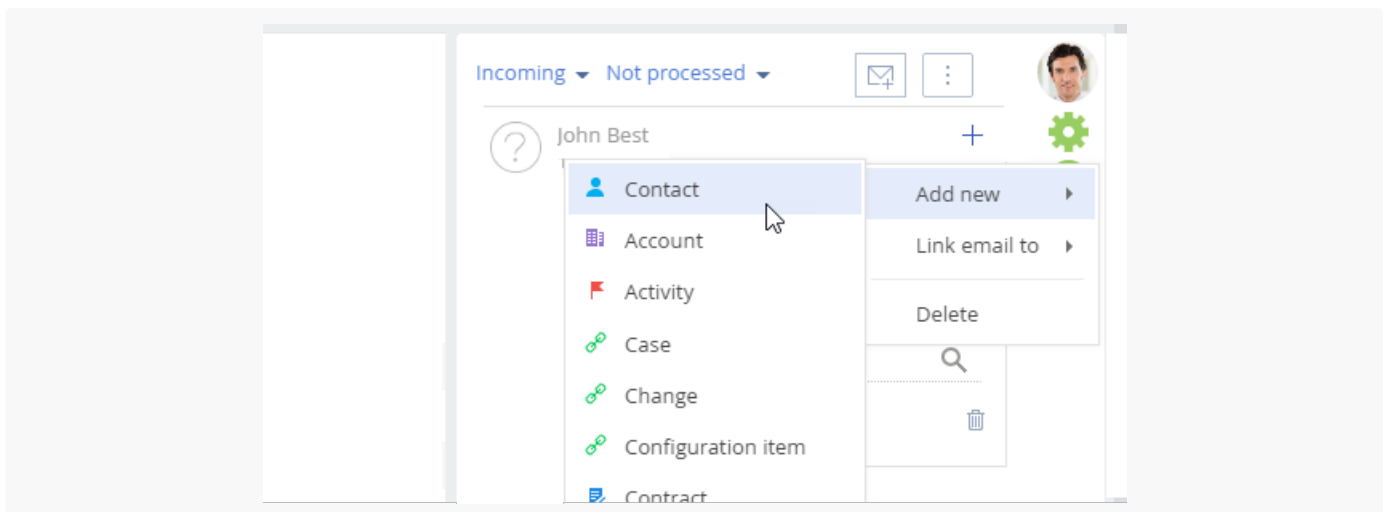
5. A new contact edit page will be created, its [*Name*] and [*Email*] will be populated with the email message data. You can modify the entered data manually before saving the changes (Fig. 11).

Fig. 11 The page of the contact created from the email message

As a result, a new record based on the email message data will appear in the [Contacts] section.

Link emails to existing records

You can bind email messages to other records manually:

- By using a special email field where you can specify a Creatio record to bind (Fig. 12).

Fig. 12 Bind an email message to another record using email message fields
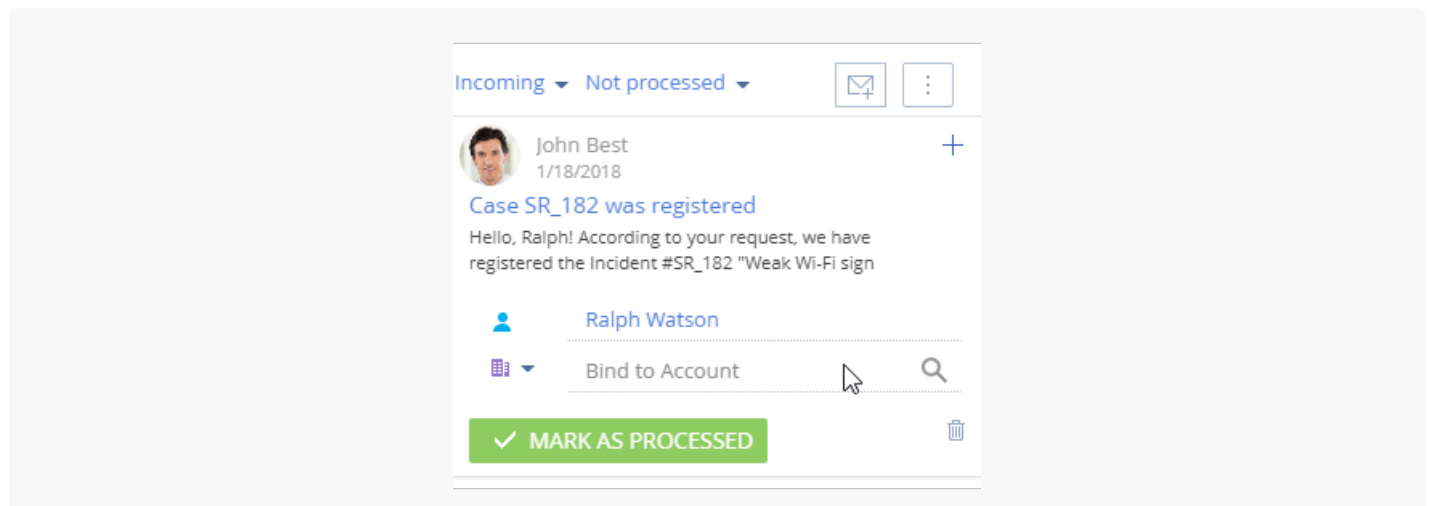
- By clicking the + button in the top right corner of the email message (Fig. 13).

Fig. 13 Bind an email message to another record using the + button
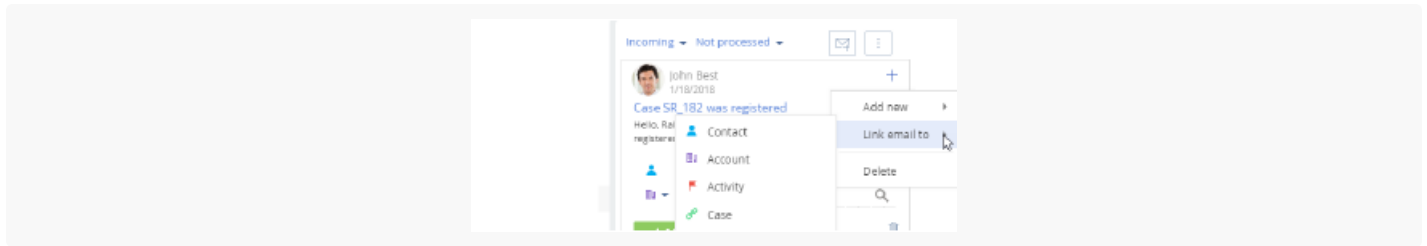
- By using the [*General information*] tab of the email message page. To open the email message page, click its subject.

As a result, the bound email message will be displayed in the [*History*] tab of the activity page.

Auto-link emails to existing records

To bind an incoming or outgoing email to other Creatio objects, set up the binding rules in the [*Rules for connecting emails to system sections*] lookup. For example, if the email subject contains an invoice number, the email will be automatically bound to the corresponding Creatio invoice.

To set up the binding rules:

1. Open the System Designer by clicking the ⚙ button in the top right corner of the application window.
2. Click the "Lookups" link in the "System setup" block.
3. Open the [*Rules for connecting emails to system sections*] lookup.
4. Click the [*Add rule*] button or open an existing rule for editing on the lookup page.
5. Fill out the required fields (Fig. 14) on the displayed page:

Fig. 14 Set up the binding rules

6. Specify the rule name, for example, "Email subject with invoice number."
7. Enter a regular expression that would match the subject text in the [*Rule*] field, such as the invoice number prefix.

   For example, if the following invoice auto numbering format is set up as follows: Inv-1, Inv-2, Inv-3, ..., Inv-n,

the regular expression is Inv-[*0-9*]+. As a result, when the following email is received - "Additional information for Inv-53," Creatio will automatically verify whether the specified invoice exists. If the invoice is found, the [*Invoice*] field on the email page will be populated with the corresponding value.

> **Note.** To assure the right connection between emails and other system objects, configure different auto numbering patterns for different system objects. For example, the auto numbering pattern is "Inv-{0}" for invoices, "Ord-{0}" for orders, "Cont-{0}" for contacts, etc. The record auto numbering in Creatio is set up via the system settings.

a. Fill out the [*Object for connection*] field group. To automatically bind emails to Creatio objects, select "Activity" in the [*Object*] field. In the [*Column*] field, specify the field to bind by. The system performs the match search using the email subject. It is located in the [*Subject*] column.

b. Fill out the [*Connected object*] fields group. In the [*Object*] field, select the system object that the rule is set up for, for example, "Invoice." In the [*Column*] field, select the column to perform the match search. In this case, the column is [*Number*].

8. Save the rule.

9. Add the rules for other sections similarly.

As a result, when uploading messages to Creatio and sending emails from the system, the message subjects will be checked according to the configured rules. If the match is found, the connection fields will be automatically populated. In addition, such messages will be automatically considered processed.

Working with emails FAQ

Why do I receive an email notification that the login/password is incorrect after mailbox registration?

Email server security settings sometimes block access to mailboxes from third-party applications. If you entered the information correctly during the email account registration, but still received a notification about an incorrect user name or password, do the following:

1. Enable IMAP access in the mailbox settings. Usually, email forwarding and POP/IMAP protocol management settings are in a separate group.

2. Enable access to your email account from third-party applications in the email account security settings.

3. In most cases, the email server sends the users an email about an attempt to connect to the mailbox. Confirm the connection authenticity by following a special link from the email.

4. Repeat the mailbox registration procedure.

How do I set up a custom email provider?

> **Note.** Set up the Exchange Listener synchronization service before setting up an email provider.

To set up email provider integration, you need to open ports 25 and 587 on the Creatio application server. On the email provider selection page, click the [*Add provider*] button, select the provider type and fill out the send/receive settings. Learn more about the detailed procedures for email provider setup in separate articles: Add IMAP/SMTP email provider . MS Exchange / Microsoft 365 email, contacts, and calendar.

Why no emails can be received in Creatio after a successful mailbox synchronization setup?

This can occur if one of the following is the case:

1. The "Activity" object includes a custom field required on the application level.

   To ensure Craetio receives emails properly, modify the field attributes. Make it required on the page level, but not required in the object.

2. The emails received from an IMAP mail server have been downloaded to Creatio and then deleted, or they have been downloaded to any other email client earlier.

   To upload the email to Creatio, change the name of the lookup based on the "EmailSynchronizedKey" object to an arbitrary name.

How to set up a shared mailbox?

Shared email accounts are used for email communication between the support team and users. Shared mailbox setup is similar to individual mailbox setup in general, but has a number of additional steps.

Why the outgoing emails are not imported to Creatio?

You can set up the import of all emails from your mailbox to Creatio. Alternatively, you can import emails from specific mailbox folders only. Check your email account folder settings for email import.

If your mailbox security settings restrict access to certain mailbox folders for third-party applications, these folders will be unavailable for importing into Creatio. To permit access to these folders for third-party applications, modify your mailbox security settings.

Also, in some cases, outgoing emails might not import from MS Outlook, because not all email servers support saving emails sent from third-party applications.

Why do I receive the "Error sending email, please contact system administrator" message when trying to send emails?

This error might be the result of the following:

- sending emails is restricted on the provider level

- no connection to SMTP server

- one of the following ports is closed on the SMTP server: 25, 465, 587

Contact your system administrator to determine the exact cause of the error and correct it.

I cannot see the [*Email*] detail in the [*Contacts*] section. Why?

The [*Email*] detail is not displayed for contacts who have "Employee" specified in the [*Type*] field and "Our company" specified in the account profile. Use Creatio development tools to modify this logic.

Work with message templates

PRODUCTS: ALL CREATIO PRODUCTS

In Creatio, you can design the message content from scratch or tailor an existing template to the recipient. Use templates to send emails as part of business processes, automatic notifications, and quick replies in chats. Configure all templates in the [*Message templates*] section. By default, the templates are created in the default application language. If you want to localize your templates, set up a template in the default language first. You can copy the base template settings to other languages when you add localizations later.

Set up a message template

Set up an email template

1. Go to the [*Studio*] workplace and click [*Message templates*].
2. Click [*New*] and select "Email template" in the menu.
3. Specify the template name on the opened page. For example, "Date and time of the meeting."
4. Specify the macro source. For example, "Activity."
5. Click [*Edit*] on the [*Email template*] detail. The Content Designer will open. By default, the templates are created in the default application language. If you want to localize your template, add localizations to the template after the initial setup.
6. Fill out the email subject in the Content Designer.
7. Drag the [*Block*] element to the working area.
8. Drag the [*Text*] element to the block.
9. Replace the [*Text*] element's placeholder content with the desired message.
10. If necessary, insert macros to personalize the message with the sender or recipient's data.

    a. Place the cursor where you want to insert the macro.
    b. Click ⊡˙ → [*Basic macro*].
    c. In the popup, pick a macro and click [*Select*].

11. Save the template.

As a result, Creatio will create a new "Date and time of the meeting" email template. Learn more about using email templates: Send a template-based email.

> **Note.** Learn more about the Content Designer and working on complex templates: Email templates.

Set up a chat template

1. Go to the [*Studio*] workplace and click [*Message templates*].

2. Click [*New*] and select "Chat template" in the menu.

3. Specify the template's name on the opened page. For example, "Greeting."

4. Make sure that the macro source is "Chat."

5. Enter the message in the [*Chat template*] detail. If you want to localize your template, add localizations to the template after the initial setup.

6. If necessary, insert macros to personalize the message with the sender or recipient's data.

   a. Place the cursor where you want to insert the macro.

   b. Click ▢⁊ → [*Basic macro*].

   c. In the popup, pick a macro and click [*Select*].

7. Save the template.

As a result, Creatio will create a new chat message template. Learn more about using chat templates: Work with chats.

Set up template localization

Use localized templates to send messages to your customers in their preferred language. You can use this functionality:

• in chats

• when sending template-based emails from the action panel or communication panel

• when sending notifications about business processes

Take the following steps to set up localized messages:

1. Set up the languages to use for communication with your customers. Read more >>>

2. Create localized templates. Read more >>>

Email template language verification

To determine the language of an email sent to a customer, Creatio verifies:

1. This verification stage is only relevant to the case emails. Whether the [*Always use the mailbox language*] checkbox is selected in the [*List of mailboxes for case registration*] lookup.

   a. If the checkbox is selected, Creatio will send the email in the mailbox language to the recipient.

   b. If the checkbox is not selected, Creatio will switch to the next verification stage.

2. Whether the [*Preferred language*] field is filled out on the contact page.

   a. If the field is filled out, Creatio will send the email in the specified language to the recipient.

   b. If the field is not filled out, Creatio will switch to the next verification stage.

3. Whether the mailbox language is specified.

    a. If the mailbox language is specified, Creatio will send the email in the mailbox's language to the recipient.

    b. If the mailbox language is not specified, Creatio will switch to the next verification stage.

4. Whether the "Default language for messages" ("DefaultMessageLanguage" code) system setting is filled out.

    a. If the system setting is filled out, Creatio will send the email in the specified language to the recipient.

    b. If the system setting is not filled out, Creatio will send the email in the default Creatio language to the recipient.

Note. If you specify contacts with different languages or contacts without the preferred language in the [To] field when sending multilingual messages as part of a business process, Creatio will send the template in the default language to all recipients.

Chat template language verification

To determine the language of a chat template, Creatio verifies:

1. Whether the [Preferred language] field is filled out on the contact page. Creatio sets a new contact's [Preferred language] field to the language specified in the chat channel automatically.

    a. If the field is filled out, Creatio will send the template in the specified language to the recipient.

    b. If the field is not filled out, Creatio will switch to the next verification stage.

2. Whether the chat channel language is specified.

    a. If the chat channel language is specified, Creatio will send the template in the chat channel language to the recipient.

    b. If the chat channel language is not specified, Creatio will switch to the next verification stage.

3. Whether the "Default language for messages" ("DefaultMessageLanguage" code) system setting is filled out.

    a. If the system setting is filled out, Creatio will send the template in the specified language to the recipient.

    b. If the system setting is not filled out, Creatio will send the template in the default Creatio language to the recipient.

Set up preferred languages

Specify the preferred language on the contact page in the [Contacts] section. Creatio will send email notifications in this language to the contact. The preferred language does not depend on the UI languages configured for user operation or the default Creatio language.

The [Customer languages] lookup values are used to specify languages and generate multilingual templates.

- Only the languages with the [Is used] checkbox selected in the [Customer languages] lookup are available for selection on the contact page.

- By default, all languages listed in the lookup are available for use in message templates. If you add an inactive language to a template, the [Active] checkbox will be selected for this language in the [Customer languages]

lookup.

The deactivated language becomes unavailable in the [*Preferred language*] field menu on the contact page but is still displayed if it was specified earlier. The chat or email template tab in such language is hidden, but messages will still be sent if this language is specified on the contact page.

If you reactivate a language, all the earlier created templates will be displayed in the lookup.

## Create a localized message template

You can set up a localized chat or email message template in the [*Message templates*] lookup.

To create a localized template:

1. Go to the [*Studio*] workplace and click [*Message templates*].

2. Select the template to which you want to add localizations.

3. Click the ⚙ button. In the menu, you will see all languages with the [*Active*] checkbox selected in the [*Languages*] lookup. Select a template language you want to add.

   If there are no active languages in Creatio yet or you want to add a tab with the language that has not been activated, select the [*Add language*] option (Fig. 1) and select the template language you want to add in the opened window. The [*Active*] checkbox for this language will be selected automatically.

Fig. 1 Add a language to the template
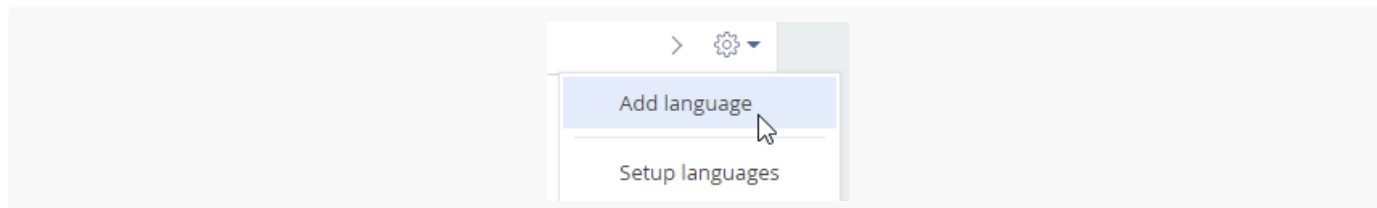
4. After you select a language, Creatio will prompt you to copy the content of an existing template to the new tab. Select this option if you need to use the configured layout for the added localization.

5. If you need to add several languages into a template, take steps 3 and 4 for each localization. As a result, several tabs for creating messages in the selected languages will be displayed on the template page (Fig. 2).

Fig. 2 A localized template

6. Select the needed tab and edit the content. Create a message in each of the languages in a similar way.

7. Save the changes.

> **Note.** If you copy a multilingual template, Creatio will copy all of its saved localizations.