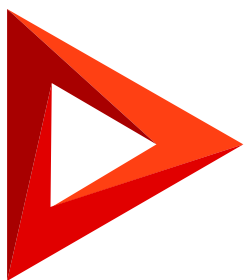


Licensing

Version 7.17



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Creatio licensing

PRODUCTS: **ALL CREATIO PRODUCTS**

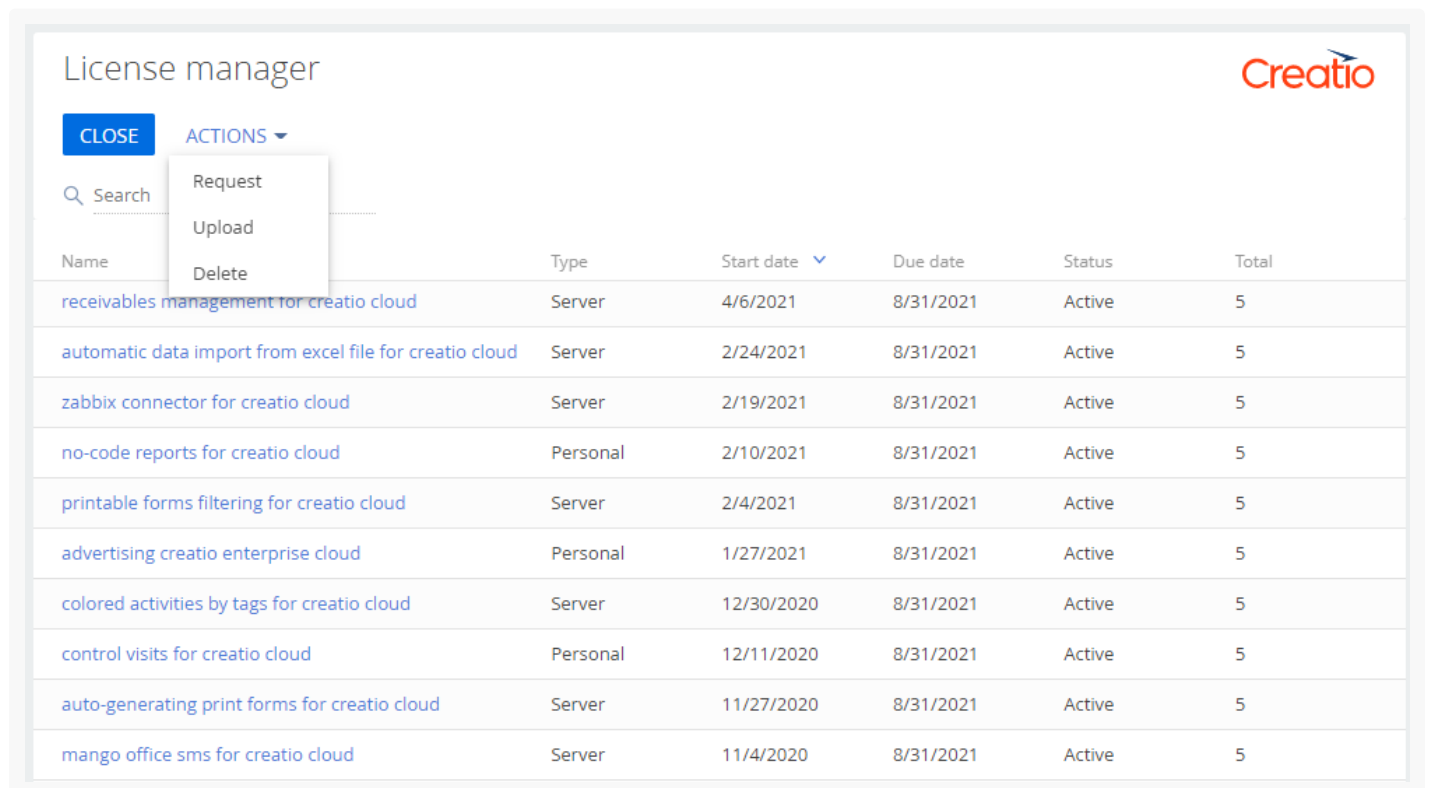
Only licensed users have access to Creatio functionality.

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.

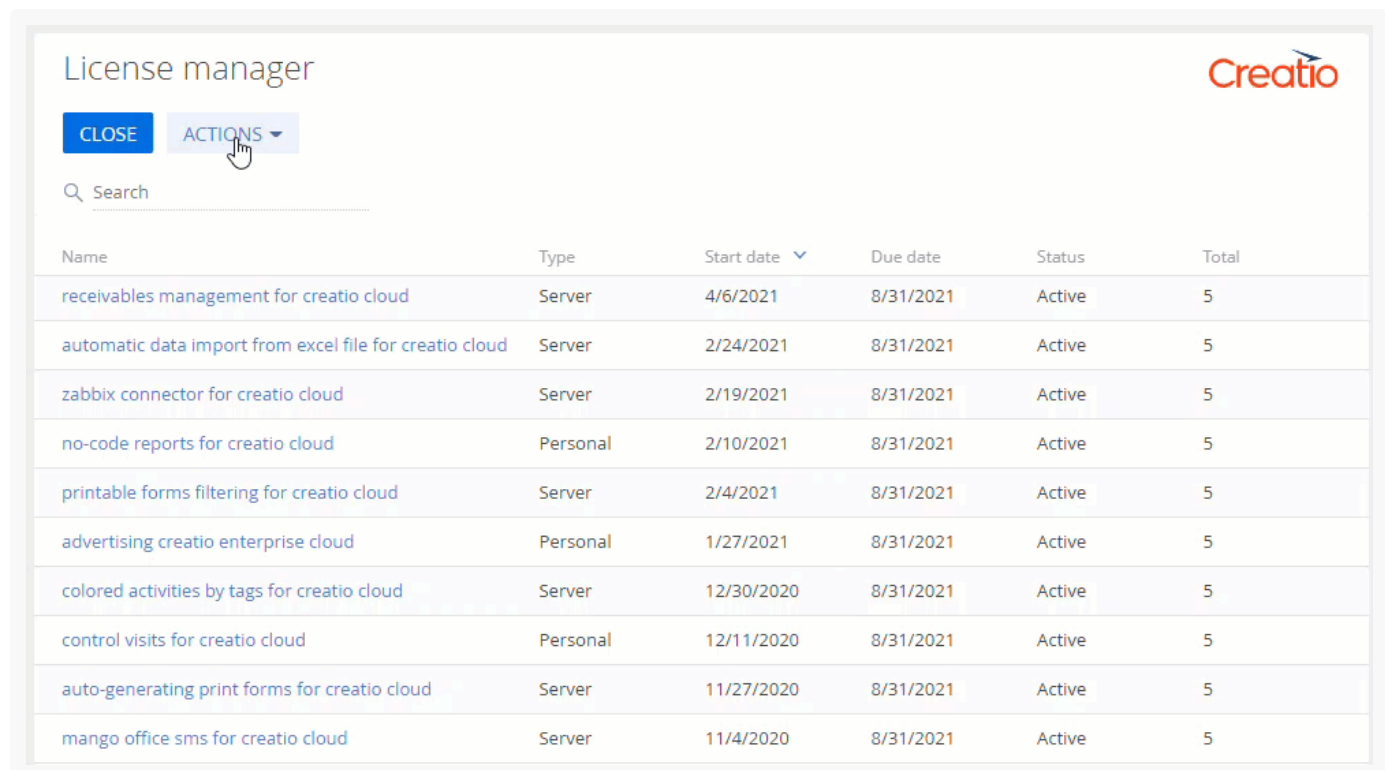
Starting from version 7.17.4, this procedure is also required when updating Creatio on-site.

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

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


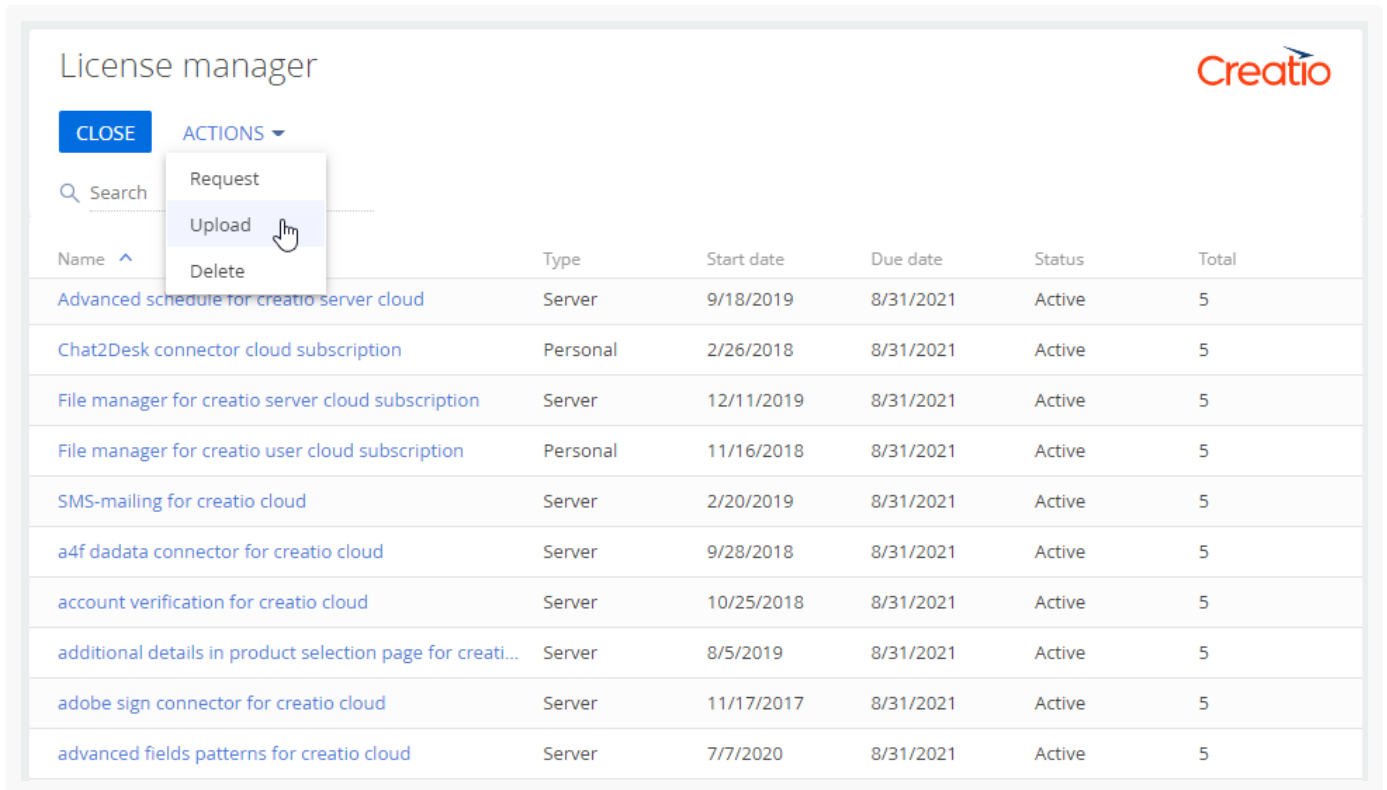
1. Save the license file received from the technical support team.
2. Click the  button to open the System Designer.
3. Click “**License manager**” under “Users and administration”.
4. Click [*Actions*] → [*Upload*] (Fig. 4).

Fig. 4 Uploading a license file to Creatio



License manager

CLOSE ACTIONS ▾

Q Search

Request

Upload

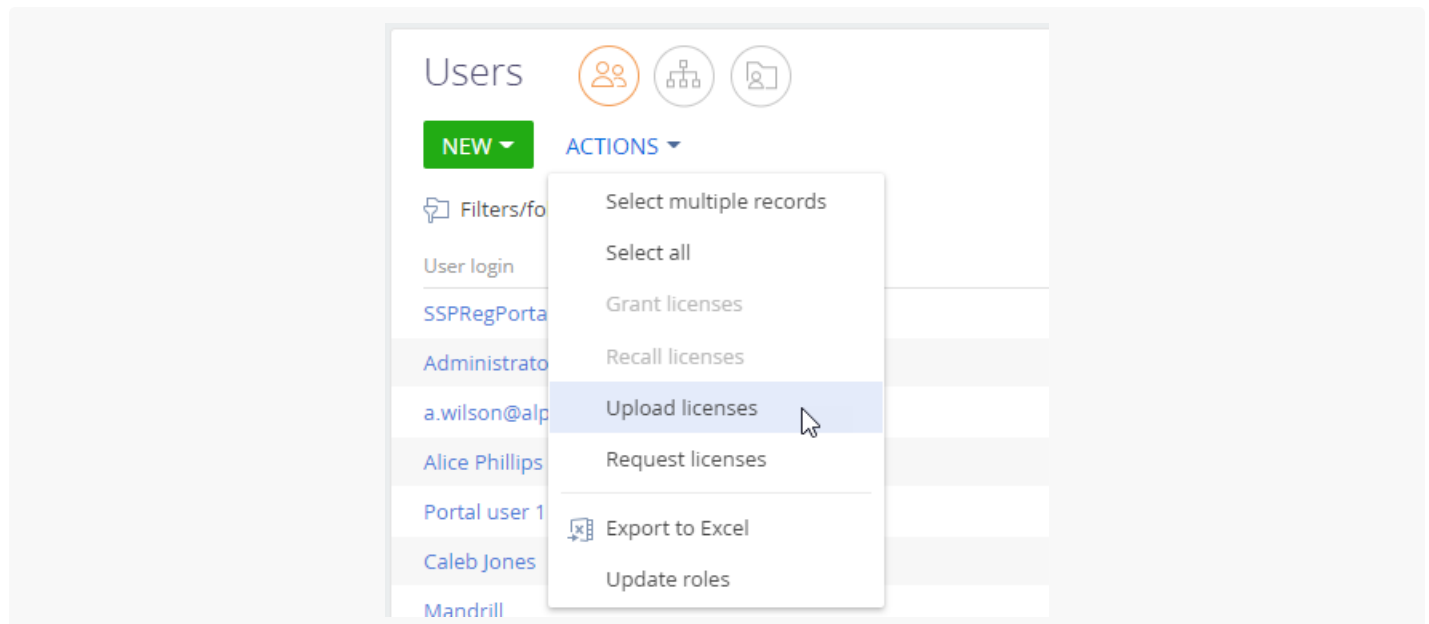
Delete

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.

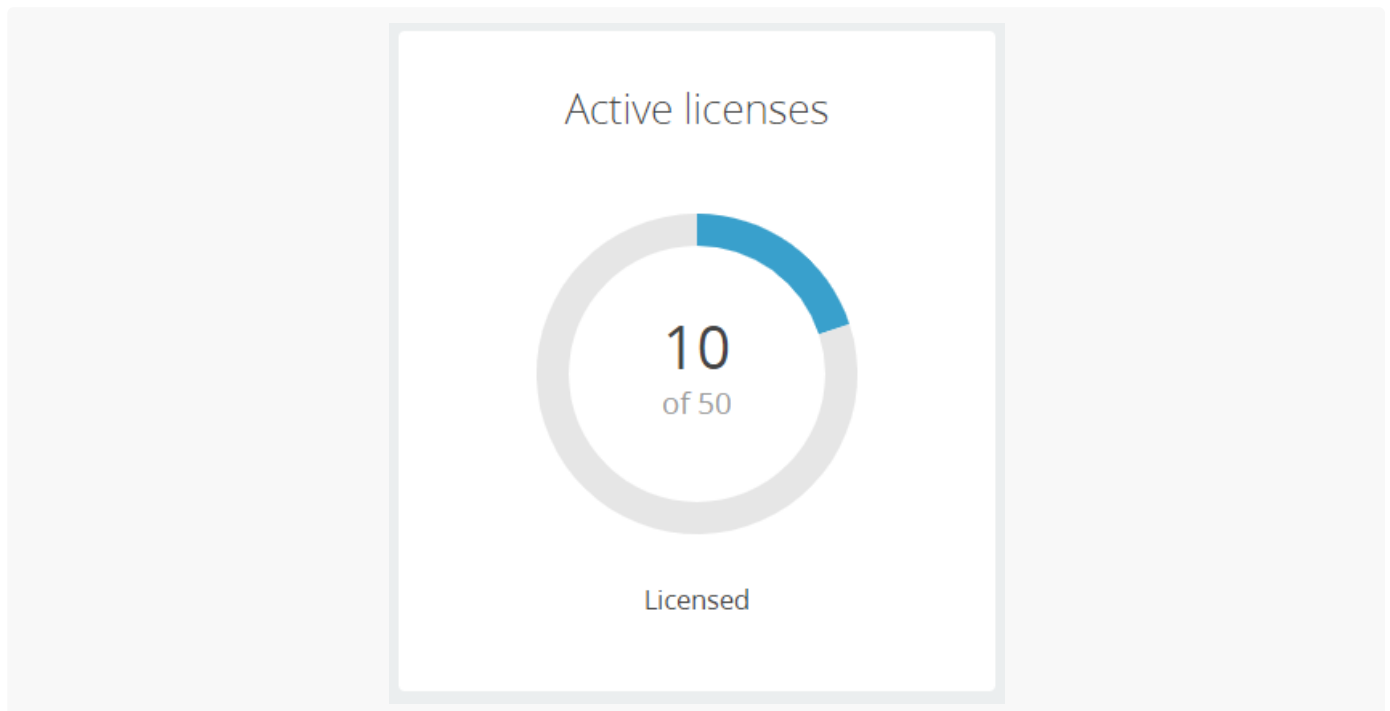
Distribute licenses among users

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:

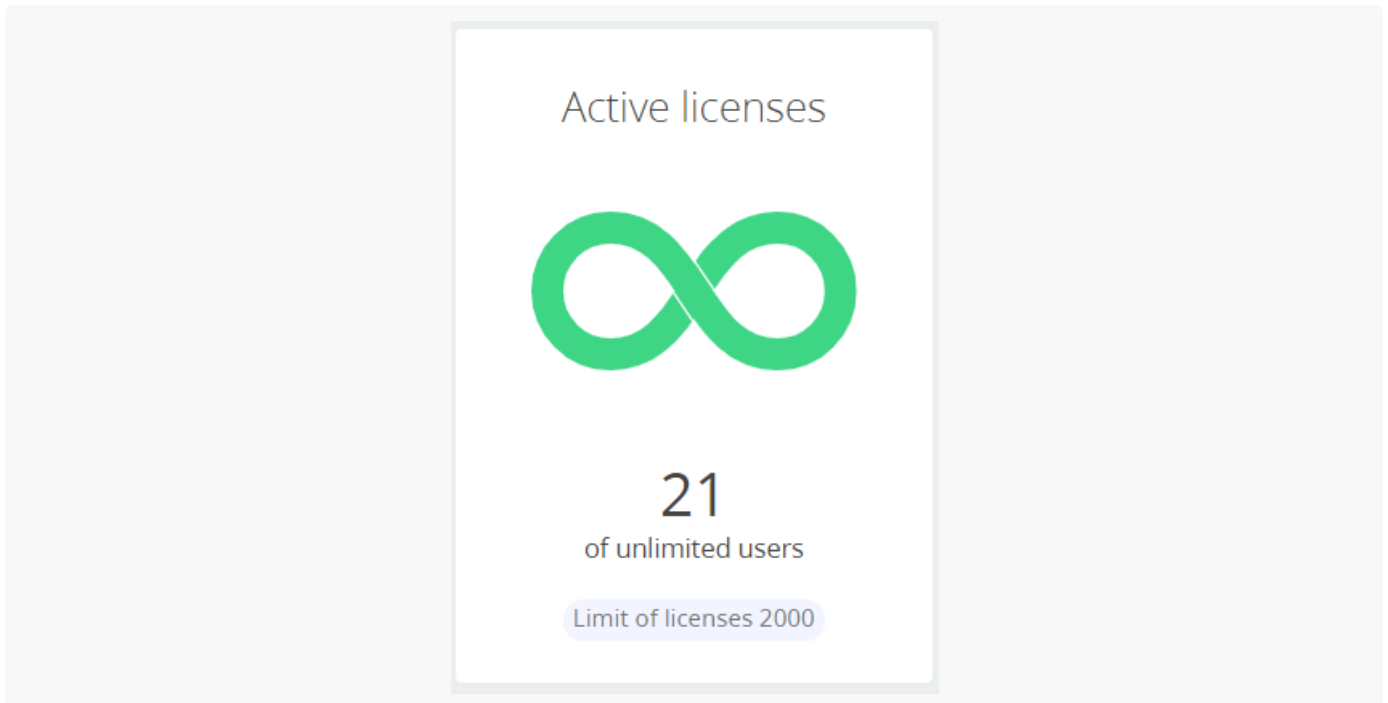
- **Personal licenses** provide access to the product for specific users. These licenses are linked to user accounts. When distributing personal licenses, make sure the number of provided licenses does not exceed the number of purchased licenses.

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

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

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 \(2\)](#)


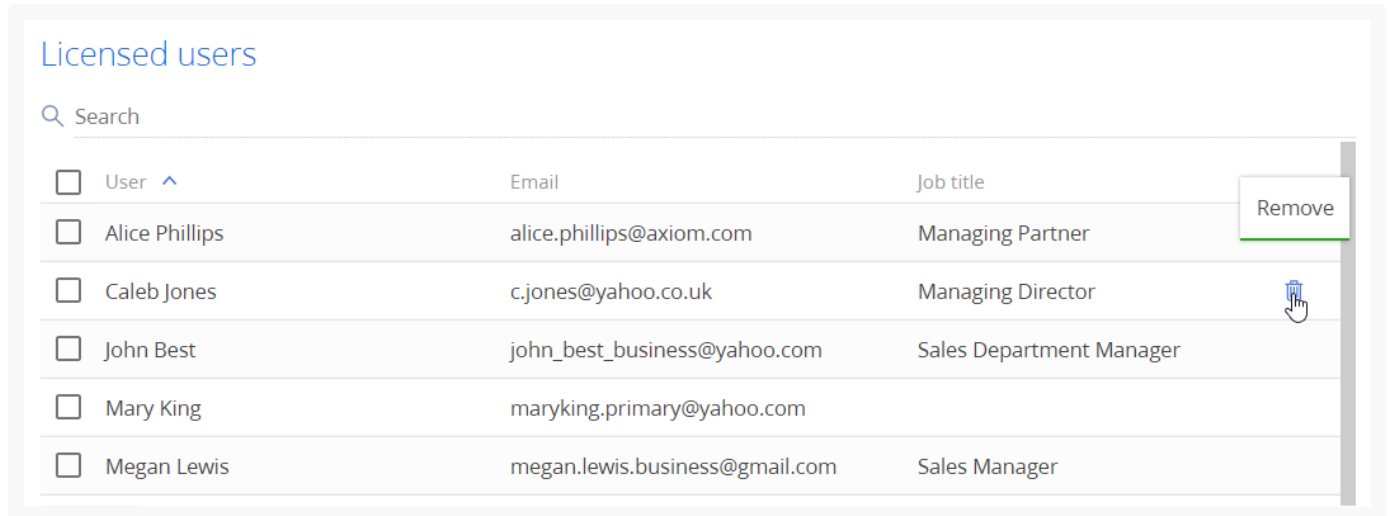

You can also hover over the names of users whose licenses you would like to recall and click the  button (Fig. 10).

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**:


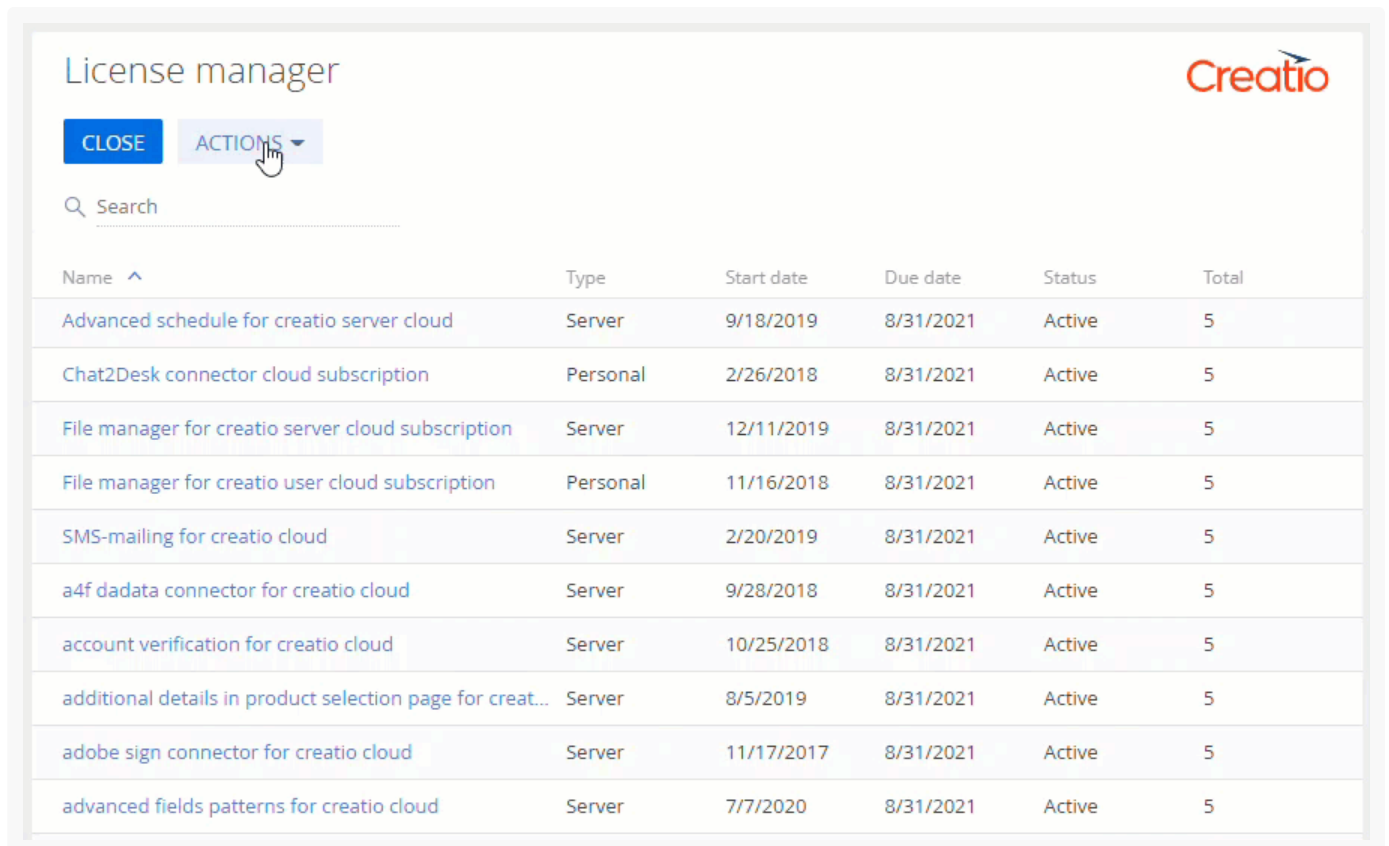
1. Click the  button to open the System Designer.
2. Click "**License manager**" under "Users and administration".
3. Click [*Actions*] → [*Delete*] (Fig. 11).

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.

Manage user licenses

PRODUCTS: **ALL CREATIO PRODUCTS**

When working with Creatio, you might need to manage user licenses, e.g., to distribute licenses to a new employee or recall licenses from a non-working employee.

You can use the [*System users*] section for this purpose. In the section, you can manage licenses of a single or multiple accounts.

Note. You can also manage licenses using the licenses manager. Learn more in the “[Creatio licensing](#)” article.

Add a portal user account


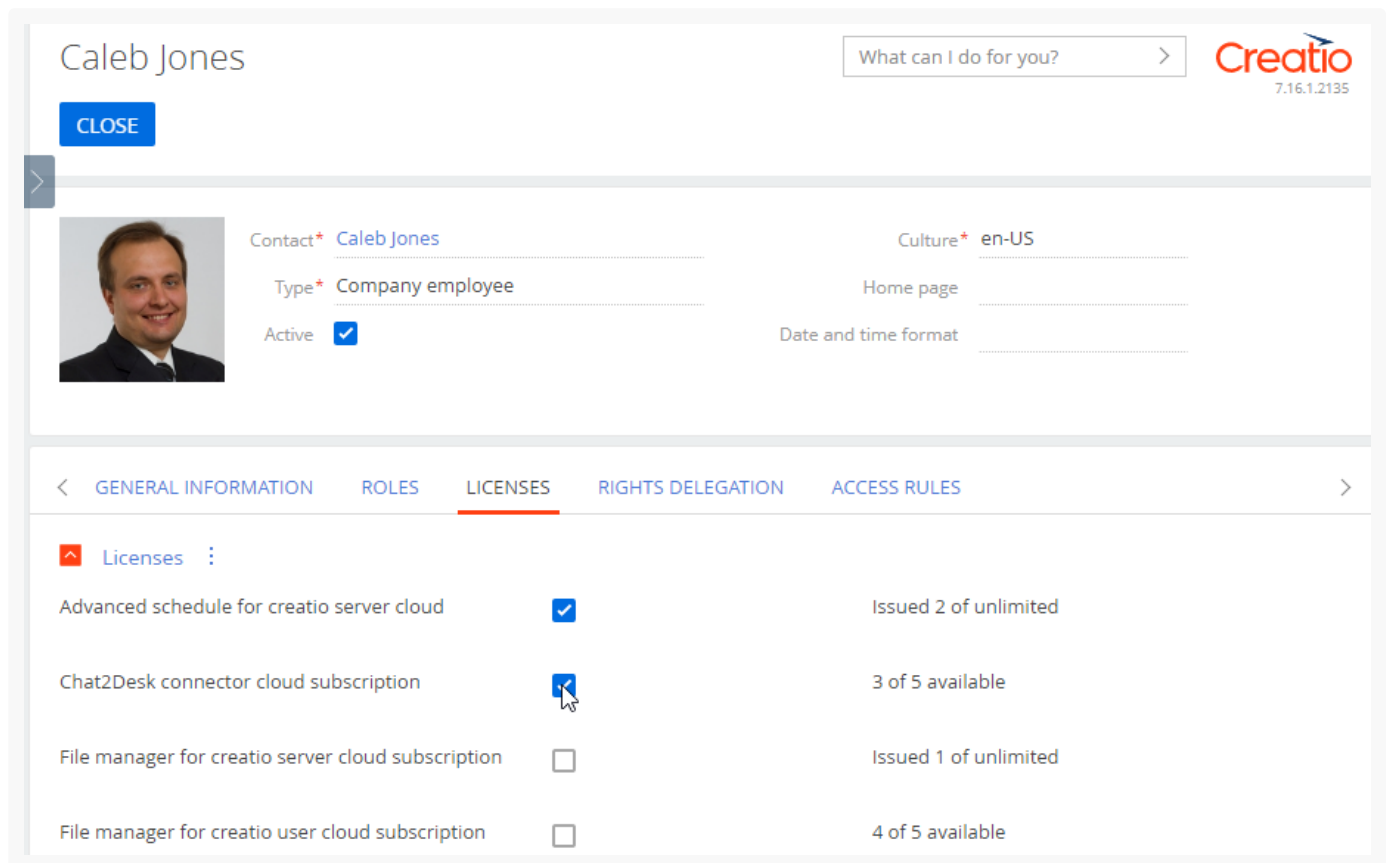
1. Click  to open the System Designer.
2. Under [*Users and administration*], click **License manager**.
3. In the section list, select the user for distributing a license. On the **Licenses** tab of the user page, select the products for licensing (Fig. 1).

Fig. 1 Selecting products for licensing



The screenshot shows the user profile for Caleb Jones. The profile includes a photo, name, contact information, and various settings. The 'Licenses' tab is selected, displaying a table of license assignments.


License Name	Assigned	Availability
Advanced schedule for creatio server cloud	<input checked="" type="checkbox"/>	Issued 2 of unlimited
Chat2Desk connector cloud subscription	<input checked="" type="checkbox"/>	3 of 5 available
File manager for creatio server cloud subscription	<input type="checkbox"/>	Issued 1 of unlimited
File manager for creatio user cloud subscription	<input type="checkbox"/>	4 of 5 available

Similarly, you can recall the licenses.

4. Save and close the page.

As a result, the selected licenses will be distributed or recalled for the user account.

Distribute or recall licenses for multiple users

1. Click  to open the System Designer.
2. Under [*Users and administration*], click **License manager**.
3. Click [*Actions*] → **Select multiple records**.
4. Select the needed users in the list.
5. Click **Actions** → **Grant licenses / Recall licenses**.
6. In the window that opens, select the Creatio products for granting or recalling licenses. Select the needed checkboxes and click **Select**.

As a result, the selected licenses will be distributed or recalled for the selected user accounts.

Marketing Creatio licensing

PRODUCTS: **MARKETING**

You need the following additional licenses to work with **Marketing Creatio** and **Creatio CRM bundle**:

- **Marketing campaign** licenses (“marketing creatio”). Enable access to all sections of the Marketing Creatio product. The number of licenses must correspond to the number of Creatio users.
- **Active marketing contact** licenses (“marketing creatio 1000 active contacts”). Enable creating records in the [*Email*], [*Campaigns*], and [*Events*] sections. The number of licenses must not be less than the number of active contacts who receive marketing communications (emails, campaigns, or events).

Note. License names include prefixes that specify the application deploy method: onsite or cloud. Cloud licenses do not apply to on-site applications and vice versa.

Active contacts are contacts who have had at least one of the following types of marketing communications within the last year:

- A contact was a part of an email audience and the email sent to the contact had an actual response.
- A contact was a part of an event audience.
- A contact was a part of a campaign audience.
- A contact is a part of a loyalty program and they made at least 1 purchase in the past year (if you use Creatio Marketplace products that automate loyalty programs).

Licenses are valid within the **licensing period**. The licensing period lasts for 365 days, starting from the license start date and ending on the date specified as “Due date” in the License Manager.

The contact can become active only once during a licensing period. If the contact was active during a previous licensing period, but they did not receive any marketing communications during the current period, Creatio does not consider the contact as active during the current period.

Make sure that the number of active contacts (used licenses) does not exceed the number of available licenses.

If the number of used licenses exceeds that of the available licenses, errors may occur during the following:

- saving or sending emails
- editing email templates in the Content Designer
- advancing a campaign to the [*Marketing email*] step
- certain operations in the [*Events*] and [*Campaigns*] sections might be disabled

Creatio notifies the users when the number of available active contact licenses becomes lower than the threshold percentage of the total number of paid licenses, 10% by default. Notifications are sent only to system users whose contacts are owners or creators of emails, campaigns, events over the past 30 days. We recommend such users to **check the [*Notifications*] tab** of the Communication panel regularly.

Note. You can change the threshold percentage in the “Active contacts - warning threshold (%)” (“ActiveContactsWarningThreshold” code) system setting.

If the number of active contacts exceeds the number of purchased licenses, you need to purchase additional licenses. Send a license request to Creatio technical support team.

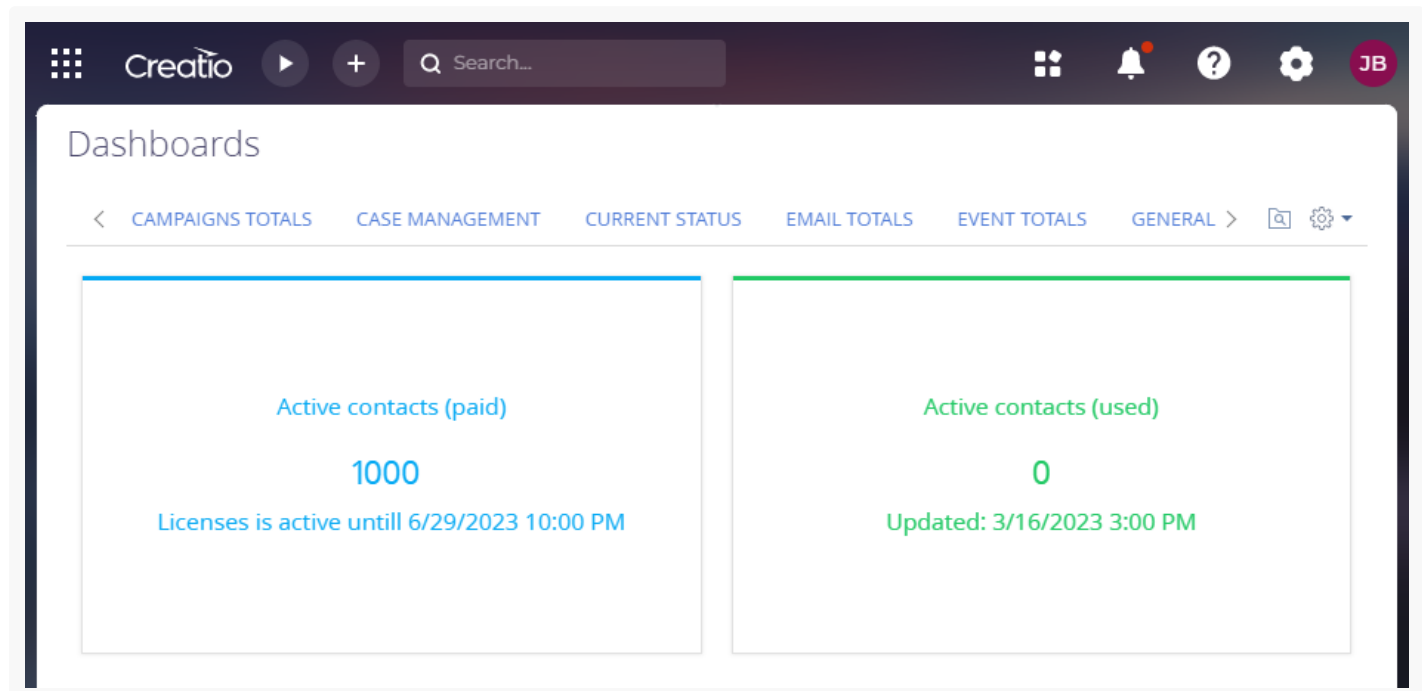
The following guidelines will help **avoid restrictions and errors caused by the lack of available licenses**:

- When adding groups of contacts to email participants make sure to check the filters of corresponding contact folders. If the filters have been modified, participants who do not belong to the target audience of the email may be included in the folder. Creatio calculates the number of active contacts and available licenses regularly (once every four hours), and additionally – each time after an email is sent. That is why the notification about insufficient licenses may be missing when you form the email audience.
- If the number of active contacts does not exceed the available licenses on sending an email, Creatio will send emails to each of the recipients from the audience. For example, you have 10000 licenses and 9999 active contacts. You add 50000 recipients in the email audience. In this case, email messages will be sent to all contacts from the audience. After sending the email, Creatio check license availability and apply licensing limitations, if necessary.
- When sending emails, be sure to check the settings that enable you to manage the sending operation and restrict sending emails to inactive contacts, namely:
 - Prohibition to use a contact's email address (the [*Do not use Email*] checkbox on the [*Communication options*] detail of the contact).
 - Possibility to subscribe to certain email types as well as unsubscribe from them.

Check the number of used active contact licenses

The number of owned licenses and active contacts is available in the [*Dashboards*] section, on the [*Licenses*] tab (Fig. 1). These metrics may slightly differ from the actual data since they are calculated once an hour. Since Creatio version 8.0.2 the indicators also display licenses end date.

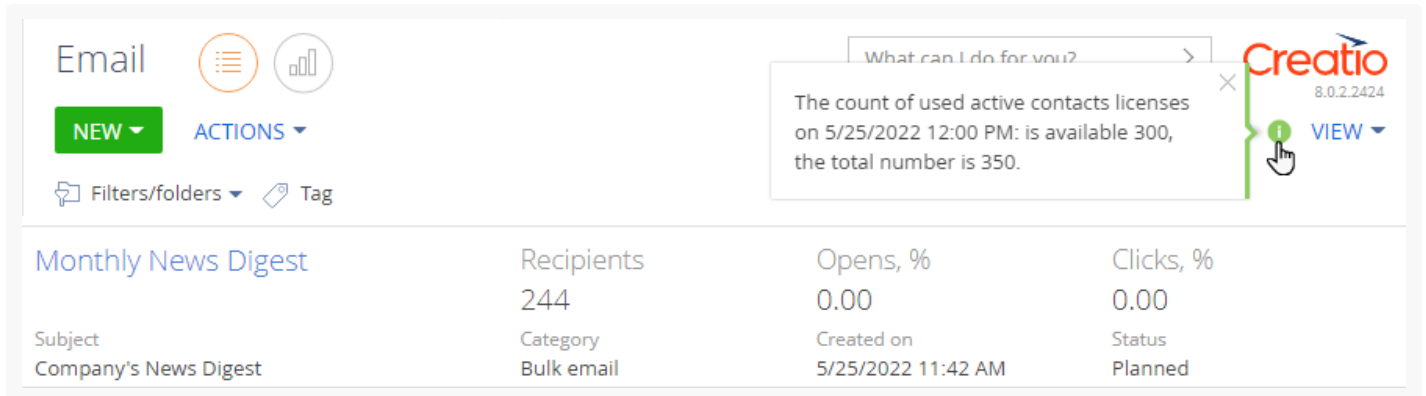
Fig. 1 License dashboard



You can view the total number of marketing contact licenses and number of available licenses on tooltip on the list page and record page of the [*Email*], [*Campaigns*], [*Events*] sections as well. The tooltip color depends on the

number of available licenses and varies from green (sufficient licenses) to red (no vacant licenses). These numbers might slightly differ from the actual data since they are calculated once an hour.

Fig. 2 License indicator



The screenshot shows the Creatio interface with a license indicator popup. The popup text is: "The count of used active contacts licenses on 5/25/2022 12:00 PM: is available 300, the total number is 350." The interface also shows an email list with columns for Subject, Recipients, Opens, %, Clicks, %, Category, Created on, and Status.

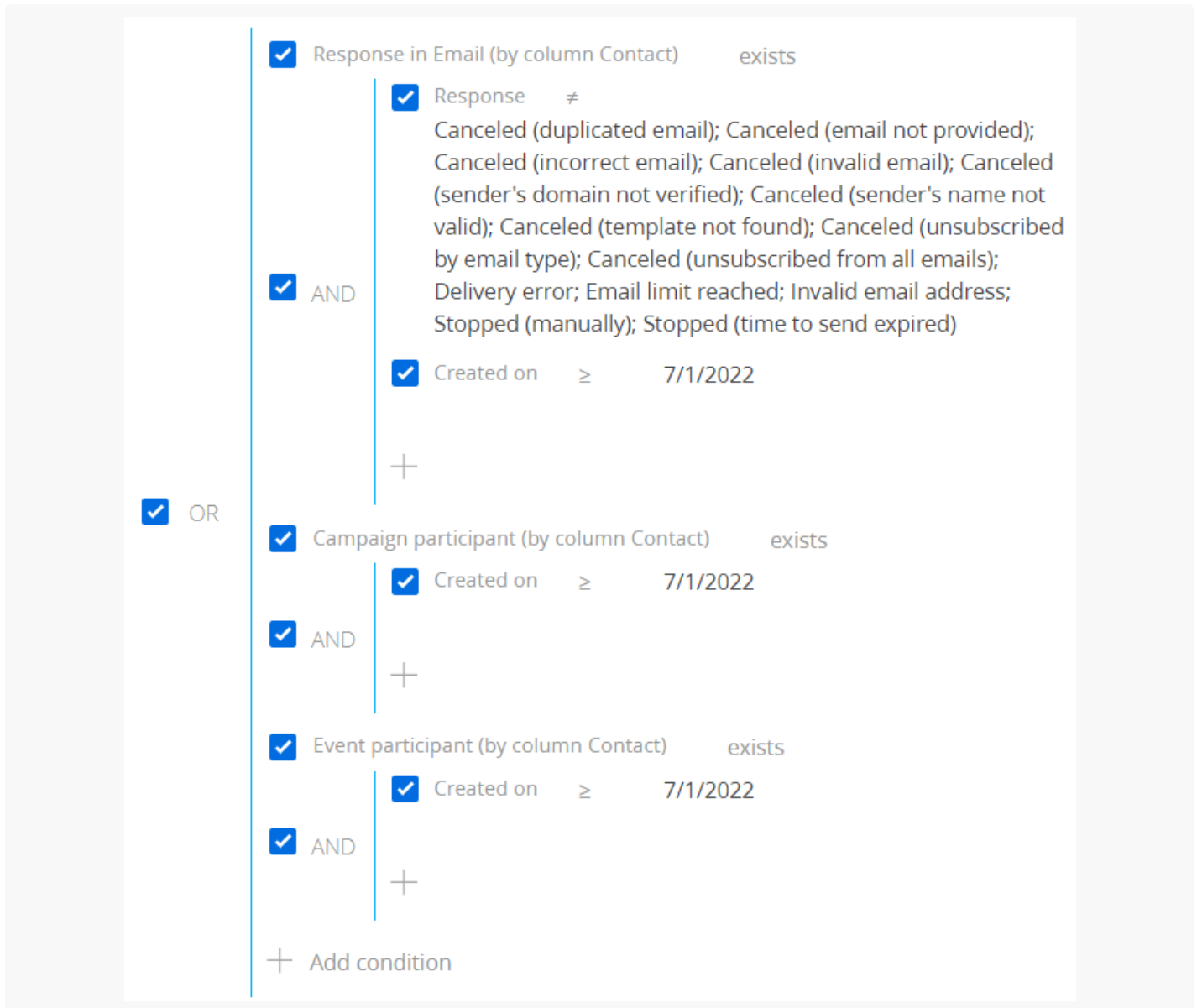
Subject	Recipients	Opens, %	Clicks, %
Company's News Digest	244	0.00	0.00
	Category	Created on	Status
	Bulk email	5/25/2022 11:42 AM	Planned

Creatio checks license availability on schedule or after sending an email. We recommend checking the number of available licenses manually when you prepare a new email communication with customers.

To view the list of active contacts, set up a filter in the [*Contacts*] section as shown in Fig. 3.

Attention. The filter does not include the loyalty program participants.


Fig. 3 A filter that displays active marketing contacts



The “Created on” date in the filter is the date when the licenses were uploaded to Creatio. To calculate the needed date:

Fig. 4 View the license validity term

License manager		Creatio				
<input type="button" value="CLOSE"/>		ACTIONS ▾				
Q marketing <input type="text" value="x"/>						
Name ^	Type	Start date	Due date	Status	Total	
marketing creatio 1000 active contacts	Server	6/30/2022	6/30/2023	Active	1,000	

1. Click  to open the System Designer.

2. Go to the “Users and administration” block → “**License manager.**” This opens a page.
3. Use the search field to find the needed license by name quickly and view its end date on the page that opens (Fig. 2).
4. Copy the start date of the license.

Note. The license expires in 365 days after it was uploaded. If the due date is bigger than start date + 365 days, contact Creatio support or your manager.

As a result, you will get the start date of the license validity period. Enter the date in the [*Created on*] column when setting up the filter that selects active contacts.