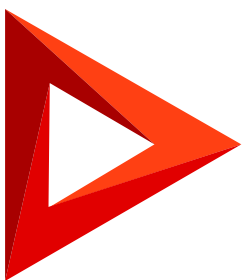


Bulk email

Version 8.0



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Create a bulk email

PRODUCTS: **MARKETING**

Bulk emails of the [*Email*] section are sent once to a set number of recipients and enable you to actively engage your customers. Use bulk emails to notify your customers about news, promo offers and discounts that might be of interest to them.

Note. The Creatio on-site users need to set up integration with a marketing email provider before they start using the email functionality in Creatio. Learn more: [Bulk emails](#).

Fill out the bulk email data

1. Go to the [*Email*] section.
2. Click [*New*] and select [*Bulk email*].
3. Fill out the fields on the page of the new record (Fig. 1):

Fig. 1 Adding a bulk email

The screenshot shows the 'Add Bulk Email' form in Creatio. At the top, the title is 'Up to -70% discount for 50 thousand items'. To the right, there is a search bar with the text 'What can I do for you?' and the Creatio logo with version '7.18.1.2800'. Below the title, there are buttons for 'SAVE', 'CANCEL', 'ACTIONS', and 'OPEN DESIGNER'. The form fields are: 'Name*' with the value 'Up to -70% discount for 50 thousand items', 'Status' with the value 'Draft' and an information icon, and 'Recipients' with the value '0'. Below these, there are 'Send time' set to 'run manually' and 'Audience source' set to 'Lead'.

- a. [*Name*] – specify the name of the new bulk email. The name will be displayed in the [*Email*] section list only, the recipients will not see it.
 - b. [*Send time*] – specify how and when the bulk email will be sent. This field has two options:
 - **Run manually** – the bulk email will be sent when you click the [*Start sending*] button;
 - **At the specified time** – the bulk email will be sent automatically at a specified time. If you select this option, additional required fields will appear to the right. Use these fields to specify the date and time when your bulk email should start being sent.
 - e. [*Audience source*] – the contacts linked to this object will be imported to the bulk email's audience. “Contact,” “Lead,” “Event participant” objects are available by default. You can also add new objects yourself. Learn more: [Set up objects that form email audience](#).
4. Set up the email template in the content designer. Learn more: [Create an email template](#).

5. Specify the email information on the [*Parameters*] tab.
 - a. [*Email type*] - specify the type of your email, e. g., “Focus email” or “Newsletter.”
The email type is used for implementing subscriptions to different types of content.
 - b. [*System email*] - select this checkbox if the current email is not a marketing email. In this case, Creatio will ignore the [*Do not use email*] checkbox on the [*Communication channels*] detail of the recipients’ contact records and will send emails to all contacts from the email audience.

Add bulk email audience

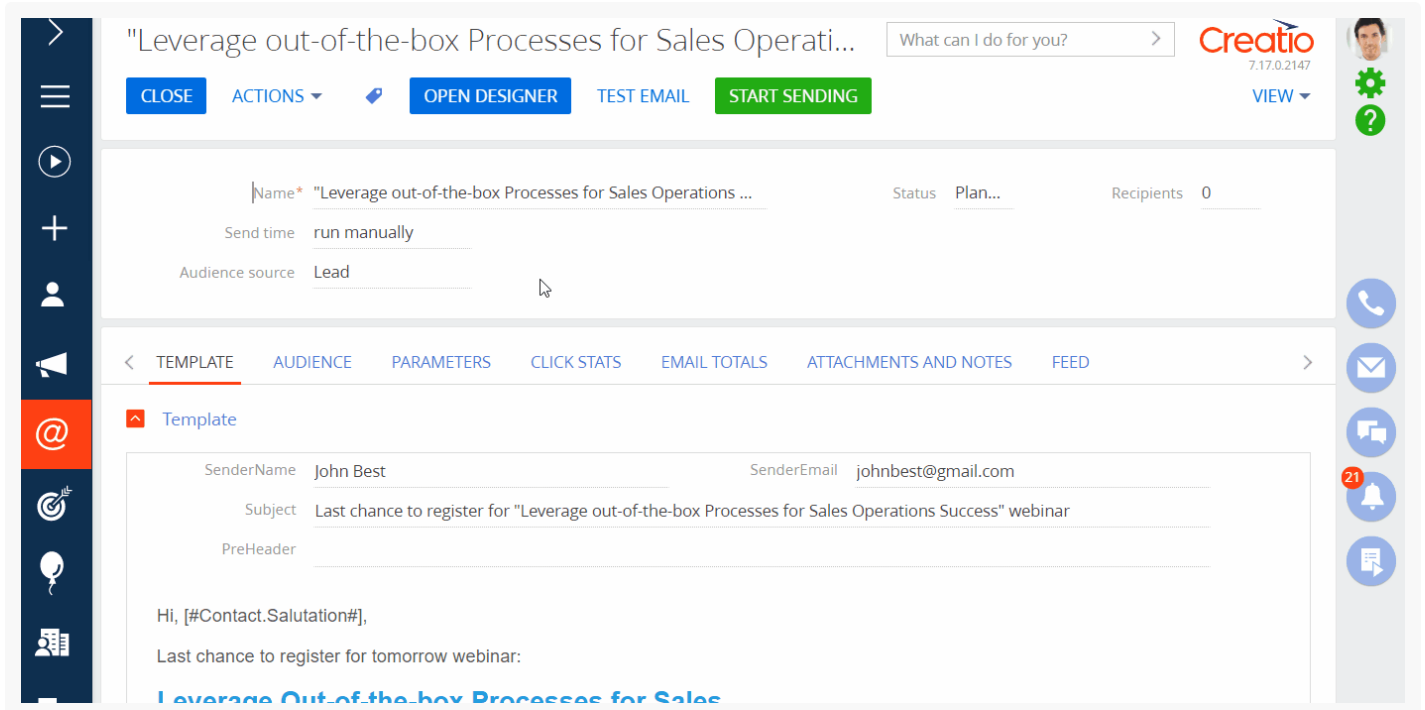
Use the [*Audience*] tab to set up the list of recipients for a bulk email. You can add contacts as well as other object records to the audience, e. g., leads or campaign participants. You can add multiple recipients to the email.

Note. You can also add new objects yourself. Read more: [Set up objects that form email audience.](#)

To add email audience:

1. Navigate to the [*Audience*] tab of the email page, click + and select the type of object to form the audience, e. g., lead, contact, or campaign participant. If the [*Audience*] tab of an email already has participants, you can only select the object whose records the current participants are based on.
2. Select records for adding to the email audience manually, from a filter, or from a folder on the newly-opened page.
 - To add records **manually**, select them in the list.
 - To add records **from a folder**, select [*Show folders*] in the [*Filters/folders*] menu. In the folder tree, select the needed folder. Learn more about how to work with folders: [Folders](#). Additionally, you can set up a standard filter for the folder records.
 - To select records **using a filter**, select [*Switch to advanced mode*] in the [*Filters/folders*] menu. Set up filters. For example, if you are adding an audience from the leads, you can select only qualified leads with a specific need type. Note that you can only save the configured filter for objects where folders are available. Learn more about how to work with filters: [Filters](#).
3. Click [*Import*].
 - To add **all records** that meet the filter conditions to the email audience, select the [*Import by filter*] option in the menu that appears.
 - To add the **records selected manually**, click [*Import selected*] in the menu that appears.

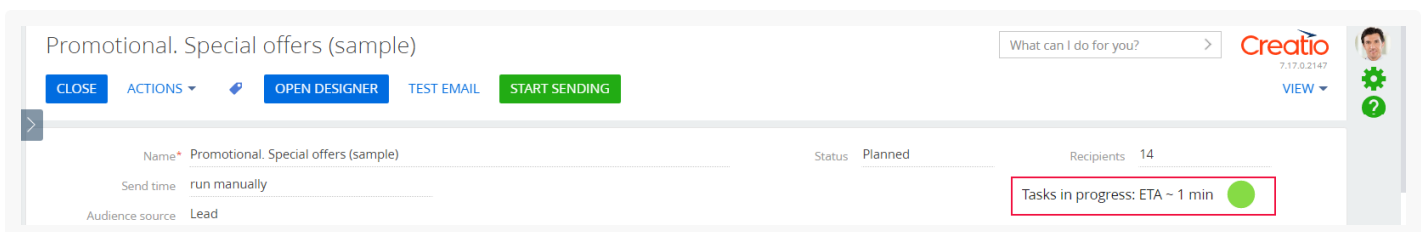
Fig. 2 Adding audience to an email



This will add all the recipients to the email audience.

- If you import the selected records or records from a folder, all the participants will be added to the [*Audience*] tab simultaneously.
- If you import the filtered records, they will add to the [*Audience*] tab one by one. You can see the import status on the email page.

Fig. 3 The audience import indicator



You can check the exact number of the added records in a notification on the communication panel.

If the import fails, you will see an error message in the communication panel.

The [*Audience*] tab displays the contact name and the email of the recipient, as well as the [*Extended entity*] column. If you hover over the column value, a mini page appears. It displays the details of a record (e. g. a lead or an event) used to import the recipient. If you click the link in the [*Extended entity*] column, you will open the page of the record used to import the recipient.

Fig. 4 Opening the page of the object used to add an email recipient

The screenshot shows the Creatio interface for managing a bulk email campaign. At the top, there's a search bar and navigation buttons: 'CLOSE', 'ACTIONS', 'OPEN DESIGNER', 'TEST EMAIL', and 'START SENDING'. The main area displays the campaign details: Name: "Leverage out-of-the-box Processes for Sales Op...", Status: ..., Recipients: 37, Send time: run manually, and Audience source: Lead. Below this, there are tabs for 'TEMPLATE', 'AUDIENCE', 'PARAMETERS', 'CLICK STATS', 'EMAIL TOTALS', 'ATTACHMENTS AND NOTES', and 'FEED'. The 'AUDIENCE' tab is selected, showing a table of recipients:

Contact	Email	Extended entity
Yolando Beumer		Lead
Rikki Crean		Lead
Regina V. Cook		Lead
Rene Youssef		Lead
Yesenia Bouie		Lead

Note. Creatio additionally verifies the email audiences when the bulk email starts. Learn more: [Start a bulk email](#).

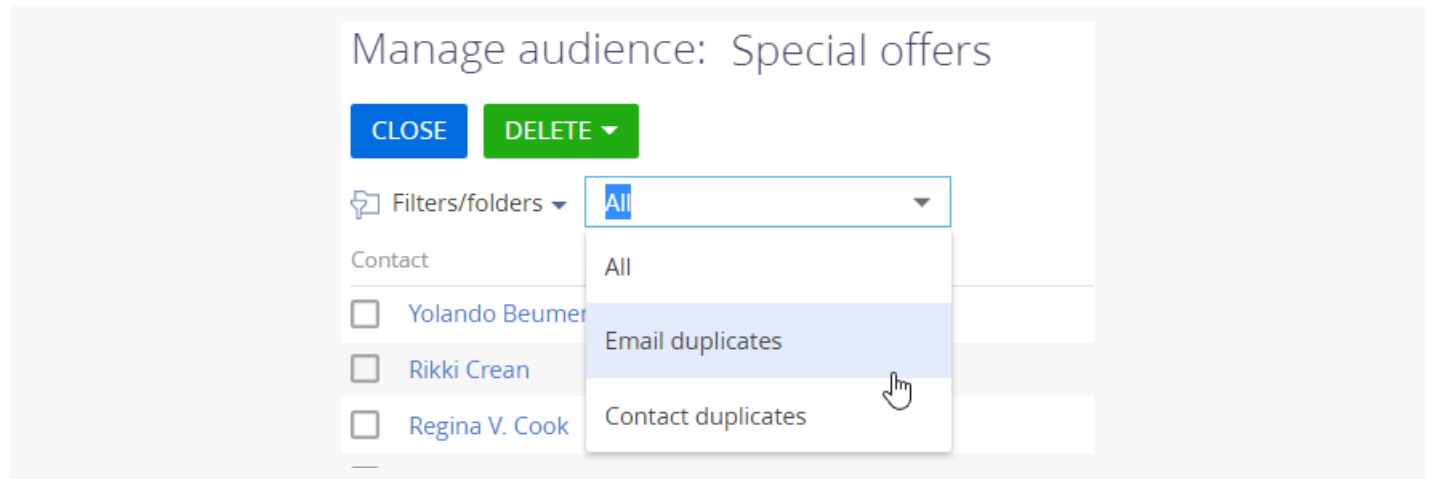
Note. The [*Audience*] tab will display recipient responses to the email sometime after the email starts. Use this tab to view the information about each response. Learn more about how to manage personal responses: [Personal responses](#).

Check duplicates in the email audience

When adding an email audience, Creatio does not verify the audience duplicates. We recommend checking the audience manually before sending emails. To do this:

1. Navigate to the [*Audience*] tab, click and select [*Manage audience*].
2. Set the filter (Fig. 5):
 - a. **“Email duplicates”** – the filter displays the email participants with similar email addresses, as well as those without email addresses specified.
 - b. **“Contact duplicates”** – the filter displays email participants with similar contact full names.
 - c. **“All”** – the filter displays all email participants.
3. Select any duplicate records and click [*Delete*]. In the menu that appears, click [*Delete selected records*].
4. Click [*Close*] to leave the audience managing page.



Fig. 5 Setting filter on the audience managing page




Delete bulk email audience

You can select email participants by selecting separate or all records. You can only delete the audience for emails that have not been started.

To delete **several recipients**:

1. Navigate to the [*Audience*] tab, click  and select the [*Select multiple records*] option.
2. Select the email participants that you want to delete.
3. In the  button's menu, click [*Delete selected records*].

To delete **all records**, click [*Remove audience*] in the  button's menu. After you delete the audience, blocking of the object selection for the import of email participants will be removed. When you add an email audience next time, you will be able to select any object and not only the object that has already been used for the email.

How to set up bulk email click tracking

Add the [UTM tracking codes](#) to the email to receive information about the number of clicks from the email. For instance, you can track the number of leads received from the email.

1. Go to the [*Parameters*] tab on the email page.
2. Select the [*Use UTM tracking codes*] checkbox in the [*Email-to-website click tracking*] block. Specify the UTM tracking codes of the email: "utm_source," "utm_campaign," and "utm_medium."
3. Specify the list of domains for which the tracking codes will be applied when generating the click link in the "List of domains" field. You can specify multiple domains using commas (,).
4. Save the changes.

Start a bulk email

PRODUCTS: **MARKETING**

We recommend **sending test emails** before you start your email. This enables checking of macro values and

contents display in the email. Learn more about test emails: [Send a test email](#).

Run synchronization manually

If the “**run manually**” value is selected in the [*Send time*] field, you can start an email manually at any time.

Open the needed email and click **Start sending**. Confirm the action in the new window.

Attention. Email domain verification is required to start sending the email.

Creatio will start sending emails in a few seconds after you click the [*Start sending*] button. During this time, you can stop the email, if necessary. You can specify the delay time in the “Delay time before sending bulk email, seconds” (“MandrillMailingDelayInSeconds” code) system setting. The delay is 10 seconds by default.

Learn more about how to stop an email: [Stop an email](#).

Schedule an email sending

If the “**at the specified time**” value is selected in the [*Send time*] field, the email will start automatically at the specified time.

Open a bulk email record and click the **Schedule sending** button. Confirm the action in the new window.

As a result, the email will be scheduled and the emails will be sent at the specified time automatically. If the due time has already passed when you click the [*Schedule sending*] button, Creatio will offer you to start sending the email immediately.

Note. If you cannot start an email or the [*Email totals*] tab values do not update, the reason might be in the “System operations user” (“SystemUser” code) system setting: the user value might have been changed or updated. Learn more: [Change the “system” user \(Supervisor\)](#).

Bulk email check-up

To make the email analysis more convenient and minimize the number of delivery errors, Creatio verifies the email audiences before starting the email. To ensure a comprehensive email response analysis, **all contacts** can be added as email recipients, including contacts who have already unsubscribed from emails or contacts with invalid or incorrect email addresses.

Use email responses on the [*Audience*] tab of the [*Email*] section page to analyze delivery errors. The responses are populated automatically after the email starts. Learn more about how to manage individual responses: [Personal responses](#).

Contact data can be modified from the moment you add it to the audience until the email start. For example, during this period the customer may unsubscribe from your email or the customer's email box may become unavailable. To take into account such changes, an additional check is performed upon email sending.

- **Subscription to your emails.** The **Do not use email** checkbox must be cleared on the contact page. Creatio will not send any emails to the contacts who have the [*Do not use email*] checkbox selected on their page. In this case, the “Canceled (unsubscribed from all emails)” response will be set in the [*Response*]

column on the [*Audience*] tab.

- **Email address relevance.** The **Valid** checkbox must be selected for the email address of each contact. The address is flagged as invalid automatically, upon receiving any “Hard Bounce” response. Creatio will not send any emails to the contacts, whose email address does not have the [*Valid*] checkbox selected. These contacts will have the “Canceled (invalid email)” response.
- **Email address availability.** The system checks whether the **Email** field is populated on the contact page. Creatio will not send any emails to the contacts who have no email address in their profile. In this case, the “Canceled (email not provided)” response will be set in the [*Response*] column on the [*Audience*] tab.
- **Email address availability.** An email will be considered “incorrect” if it does not correspond to the email address format. Creatio will not send any emails to the contacts who have incorrect email address in their profile. In this case, the “Canceled (incorrect email)” response will be set in the [*Response*] column on the [*Audience*] tab.
- **Marketing communication limit** for each recipient. You can limit the number of emails sent to contact during a set time, for example, no more than 5 emails per week. Creatio checks for this limit are based on the rules in the [*Email restriction rules*] lookup. For example, if a rule is set to send not more than two emails per day while two emails have already been sent to the contact today, then the third email will not be sent. These contacts will have the “Email limit reached” response selected in the [*Response*] field of the [*Audience*] tab. Learn more: [Configure restriction of the number of emails for sending](#).

When you add the email audience, Creatio checks the subscription to the selected email type. You can check the subscription status on the contact page: use the [*Email subscription*] detail on the [*Communication channels*] tab. Contacts without a subscription to the selected email type are not added to the email audience.

Check bulk email sending status

PRODUCTS: **MARKETING**

When an email starts, all contacts that were added to the [*Audience*] detail will be sent an email generated according to the email template. Creatio sends emails in batches. The number of emails in a batch must not exceed 20,000 emails.

Once the email starts, the information on the [*Template*] and [*Audience*] tabs, as well as in the [*Owner*] field becomes non-editable.

Once the last batch of a bulk email is sent, its status is changed to “Sent”.

Check the email progress

You can see the email progress in the [*Status*] field, on the delivery diagram, as well as on the [*Email totals*], [*Sending progress*], and [*Audience*] tabs.

The email status is displayed in the [*Status*] field. The following email statuses are available in Creatio:

- **“WaitingBeforeSend”** – the email is “on-hold”, waiting to be sent.
- **“PreparingToSend”** – checking the available providers and preparing the email for sending.
- **“SendingInProgress”** – Creatio is in the process of sending emails.
- **“Error”** – an error has occurred during sending.
- **“Completed”** – emails have been successfully sent.

The **progress chart** displayed on the email page shows the current sending and delivery status of your bulk email. Read more: [Email progress](#).

Use the [*Email totals*] tab to view the latest updates about email deliveries and recipient responses and analyze “opens” and “clicks” dynamics. Read more: [Open and click rates](#).

The [*Audience*] tab displays responses per recipient – delivered, opened, clicked, etc. This tab is updated gradually as Creatio receives and processes responses from the email provider. Read more: [Personal responses](#).

Check email completion status

You can monitor the general status of a bulk email in the list of the [*Email*] section.

Email status is shown in the [*Status*] field on the email page and in the list of the [*Email*] section (Fig. 1).

Fig. 1 Email status information

Thanks for registering on Network CRM Day	Recipients	Opens, %	Clicks, %
Subject Thank you for registering on Network CRM Day	146	81.51	38.66
Campaign Bpm'online Networking Day	Category Trigger email	Created on 7/11/2016 1:22 PM	Status Preparing to send

Information about email status **for a specific recipient** can be obtained based on responses from email recipients or email servers. The information is available in the [*Audience*] → the [*Audience*] detail → the [*Response*] column on the email page (Fig. 2).

Fig. 2 Response details for email recipients

Contact	Email	Response
Ronald Young	ronald_young@futurevision.com	Clicks
Ray Crowden	RayCrowden@gmail.com	Clicks
Regina V. Cook	r.cook@clearsoft.com	Clicks
Thanh Segura	ThanhSegura@hotmail.com	Clicks

To view dates and **exact start/end time for an email**:

1. Open an email page.
2. Go to the [*Sending progress*] tab → [*Sending duration*] field group. The start and finish date and time are available in the [*Started on*] and [*Finished on*] fields, respectively.

Stop an email

PRODUCTS: **MARKETING**

This article is relevant for **bulk** and **trigger** emails.

You can **pause an active email** if Creatio is yet to pass the emails to the sending provider. You will be able to restart the email. Learn more: [Pause an email](#).

You can also **stop** an email regardless of its status **after** Creatio has already started sending the emails. You will not be able to restart such an email. Learn more: [Stop an email](#).

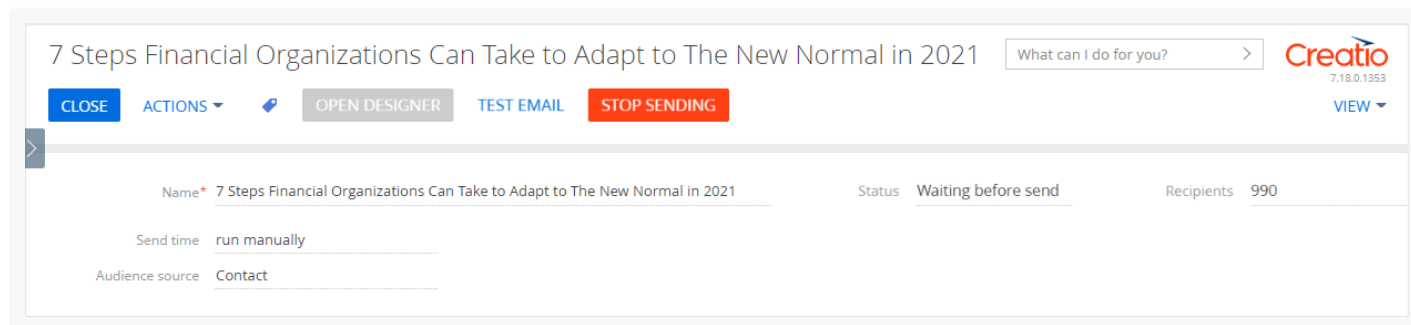
Pause an email

You can pause a bulk or a trigger email soon after the start to edit the template and **restart the email** later. The “Delay time before sending bulk email, seconds” (“MandrillMailingDelayInSeconds” code) system setting defines the period when you can pause an email. By default, the delay before Creatio starts sending emails is 10 seconds.

You can pause an email **before Creatio starts sending emails** provided that its status is “**Waiting before send.**”

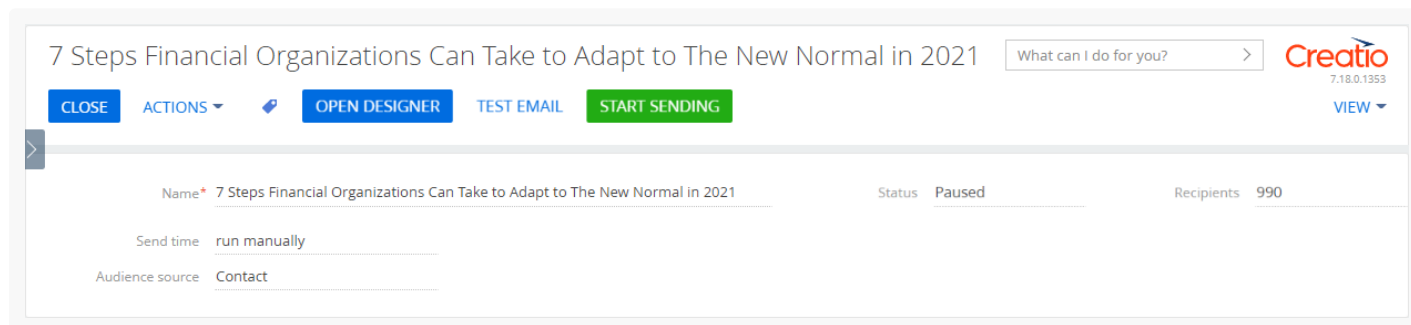
Click [*Stop sending*] and confirm the action in the dialog box to **pause an email** (Fig. 1).

Fig. 1 Stopping a bulk email



Creatio will pause the email and display the corresponding notification in the notification area. The “Email paused manually” event will be recorded in the [sending log](#). The email status will change to “Paused.” Click [*Start sending*] to restart the email (Fig. 2).

Fig. 2 Restarting an email



Stop an email

You can stop a bulk or a trigger email after Creatio has already started sending the emails. You **cannot restart** such emails.

You can only stop the emails Creatio has not yet passed to the sending provider. The email can have “**Queued,**”

“Active,” “Sending in progress” statuses.

Click [*Stop sending*] and confirm the action in the dialog box to stop an email after Creatio has already started sending it.

The email status will change to “Stopping.” Creatio will review the recipients and mark all contacts it has not yet passed to the sending provider with the “Stopped (manually)” [personal response](#). The email status will change to “Stopped” once all recipients with undelivered emails are marked with this response. The “Email stopped manually” event will be recorded in the [sending log](#). Find out more about the audience that has not received the emails in the [email progress](#) analytics.

Note. If the campaign connected to a trigger email remains active, Creatio will keep adding participants to the audience. These participants will be marked with the “Stopped (manually)” personal response. You can still advance such participants through the campaign. For example, add a new conditional flow to send another email.