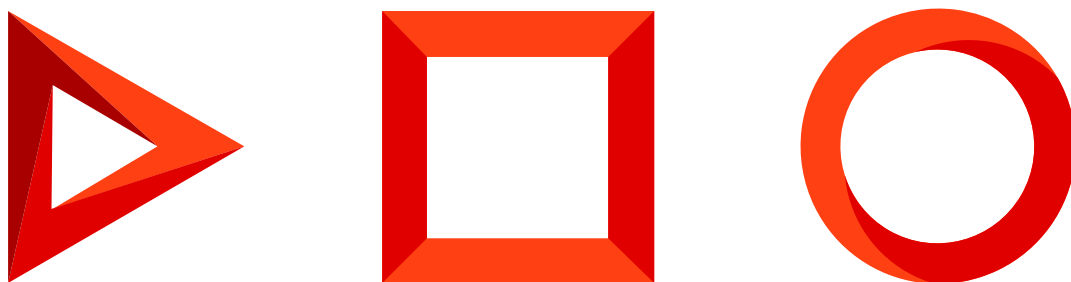


Additional setup

Version 8.0



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Set up an unsubscribe link in emails

PRODUCTS: **MARKETING**

Adding an **unsubscribe link** in each email is important to ensure its successful delivery. Emails that do not contain unsubscribe links can be blocked by the marketing email provider.

The unsubscribe link is required in the email template. If you try to save a template without an unsubscribe link, it will be added to the template automatically.


After clicking the unsubscribe link, recipients are forwarded to the URL of the **unsubscribe page**. You can either generate it on your web site or use the Creatio pre-configured page. If you decide to use your own page, make sure you specify its URL in Creatio. Before the unsubscribe page is displayed, a recipient is automatically forwarded to the Creatio server, where the information about the canceled subscription is stored.

Set up a redirection page for the recipients who unsubscribed

You can use the following options for an unsubscribe page:

- Auto-generated Creatio unsubscribe page containing text: "You have unsubscribed from further emails. Your email was successfully deleted from our mailing list."
- any other page configured on your web site. There are no specific requirements for the design of this page. The recipient unsubscribes upon clicking the unsubscribe link. The "Do not use email" checkbox is selected automatically on the contact page.

If you have your own unsubscribe page, you need to specify the address in Creatio. To do so:

1. Open the system designer by clicking the  button.
2. Click "**System settings**" in the "System setup" block.
3. In the "Email section settings" folder, open the "**Website to redirect the unsubscribed**" (RedirectUnsubscribersTo) system setting.
4. In the [*Default value*] field, specify the URL of your unsubscribe page, e.g., <http://www.mysite.com/act/unsubscribe/> and save the setting.
The value of this system setting is not populated by default. To redirect the unsubscribed, Creatio uses the auto-generated unsubscribe page.
If you clear the value in the "Website to redirect the unsubscribed" system setting, the unsubscribed link will open a default auto-generated page without any additional settings.

Add an unsubscribe link to a template

There are certain aspects of adding the unsubscribe links that depend on the method used for creating email templates.

You can use a **default template** or use any existing template by clicking the [*Select from the lookup*] button. These templates contain embedded unsubscribe links and enclosed text. The unsubscribe block looks as follows: "You have received this email as you are subscribed to Company Name emails. If you do not want to receive

emails, click here to unsubscribe." If you use such a template for your email, you can personalize the unsubscribe block in the [Content Designer using macros](#).

You can set up the contents of the unsubscribe block that is added automatically in the **Content blocks library** lookup. To do this, open the [*Footer: Unsubscribed (default)*] block, edit it and save the changes.

The unsubscribe macro is added to marketing emails automatically if it is not done while creating a template. In this case, Creatio will notify you about this and offer to add the unsubscribe macro automatically. The template will not be saved without the unsubscribe link.

If you need to configure a custom unsubscribe block for the current template, add the unsubscribe link as the **#Unsubscribe.URL#** macro. The unsubscribe link can be displayed as either a URL or a text hyperlink.

Add an unsubscribe macro as a URL


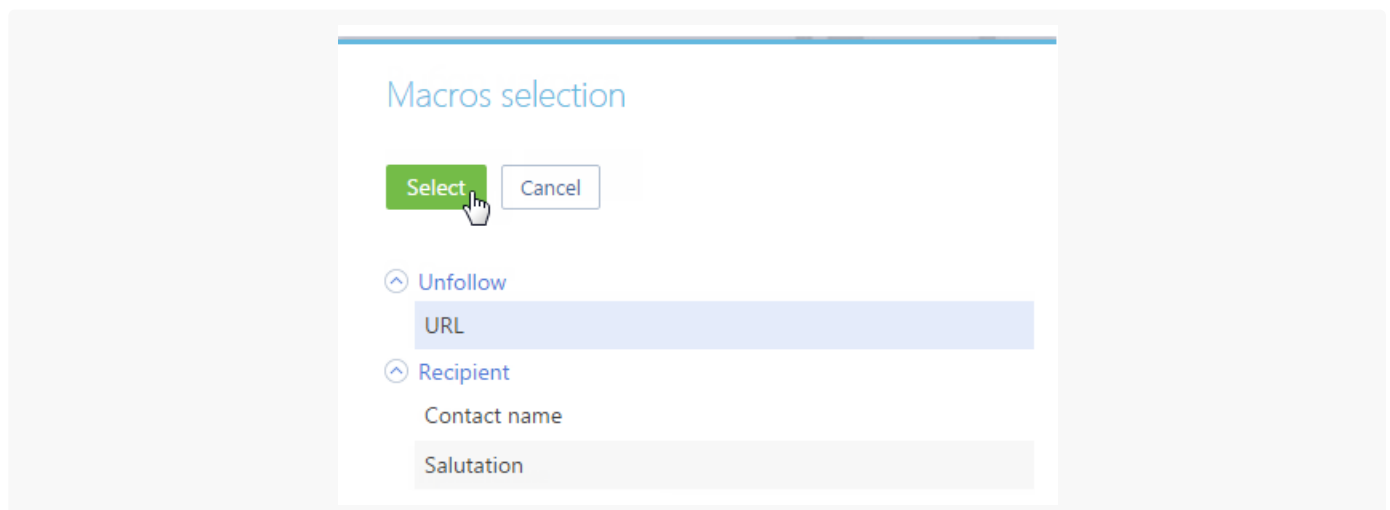
1. Open the email template in the Content Designer.
2. Set the cursor where you want to place an unsubscribe link.
3. Click  and select [*Standard macro*].
4. Select the "URL" unsubscribe macro and then click the [*Select*] button (Fig. 1).

Fig. 1 Adding an unsubscribe macro



5. Save the template.

As a result, the URL unsubscribe macro will be added to the email template. When sending emails, the unsubscribe macro is converted into an unsubscribe link, e.g., <http://www.mysite.com/act/unsubscribe/>.

Add an unsubscribe macro as a hypertext link


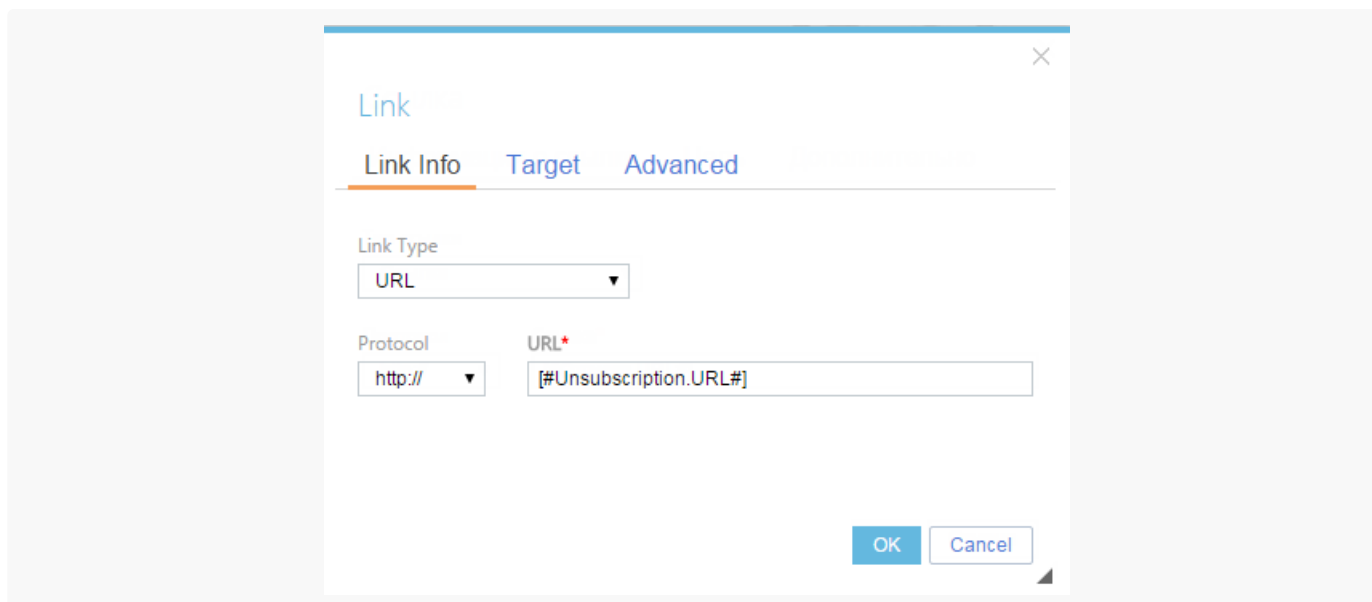
1. Open the email template in the Content Designer.
2. Select the text that serves as a hyperlink to the unsubscribe page.
3. Click the  button in the appeared toolbox.
4. Specify the [*#Unsubscribe.URL#*] macros in the [*Link*] field and click [*OK*] (Fig. 2).

Fig. 2 Adding an unsubscribe macro as a hypertext link



As a result, the selected text will serve as a hyperlink to the unsubscribe page.

You can also import templates as HTML elements into the Content Designer if a complicated HTML layout is used. You need to specify the unsubscribe link as a text macro [*#Unsubscribe.URL#*]. When sending emails, the unsubscribe macro is converted into an unsubscribe link, e.g., <http://www.mysite.com/act/unsubscribe/>.

Send a test email

PRODUCTS: **MARKETING**

Send test emails to preview the email content in an email client and check how the message will look like for your recipients. The marketing email metrics and analytics ignore test emails.

Attention. [Verify](#) your email domain before sending a test email. Besides that, specify a valid sender's address in the email.

You can send test email from the relevant email page or the Content Designer by clicking the [*Test email*] button (Fig. 1). We recommend against using words like “Test”, “Hello”, “Checking” as the email subject when sending test emails. The recipient server might perform a series of checks that could mark such emails as spam. We recommend preparing the test email content of the same quality as the content intended for the end recipients.

Fig. 1 Sending test emails from the email page

-70% discount for 50 thousand product items

What can I do for you? >

SAVE
CANCEL
ACTIONS ▾
START SENDING

Name* -70% discount for 50 thousand product items
Status Planned

Send time run manually

< TEMPLATE
AUDIENCE
PARAMETERS
CLICK STATS
EMAIL TOTALS
ATTACHMENTS AND NOTES
FEED

Sender's name*
Sender's email* sunrise@gmail.com



Subject* Up to -70% discount for 50 thousand product items

Template
Select from lookup
Edit
Test email

Up to -70%

for best brands

Highest fashion spring looks
Accessories for your style

1. Open the email in the section list. Click the [*Test email*] button on the [*Template*] tab (Fig. 1).
2. Enter the recipient email addresses in the [*Test email(s) will be sent to email addresses*] field, enter email addresses where the test email will be sent. field. Use commas “,” or semicolons “;” as separators.
3. In the [*Recipient's contact for testing macros*] field, specify the contact whose data will be used in the test email.

You can generate the test email's macros based on a contact connected to one of several objects. Specify the object in the [*Audience source*] field at the top of the email page. The name of the [*Recipient's contact for testing macros*] field changes depending on the object you selected. For example, if you select the “Lead” value in the [*Audience source*] field, the field name will change to [*Recipient's lead for testing macros*]. You can select any contact that is connected to the object.

By default, if you select the “Contact” object in the [*Audience source*] field, the campaign will use the contact specified in the “Test email recipient” (“TestSendingBulkEmailContact” code) system setting.

Note. Creatio stores the values you entered in the previous steps. Should you need to send the test email again, Creatio will populate these fields automatically. You will be able to either use those values

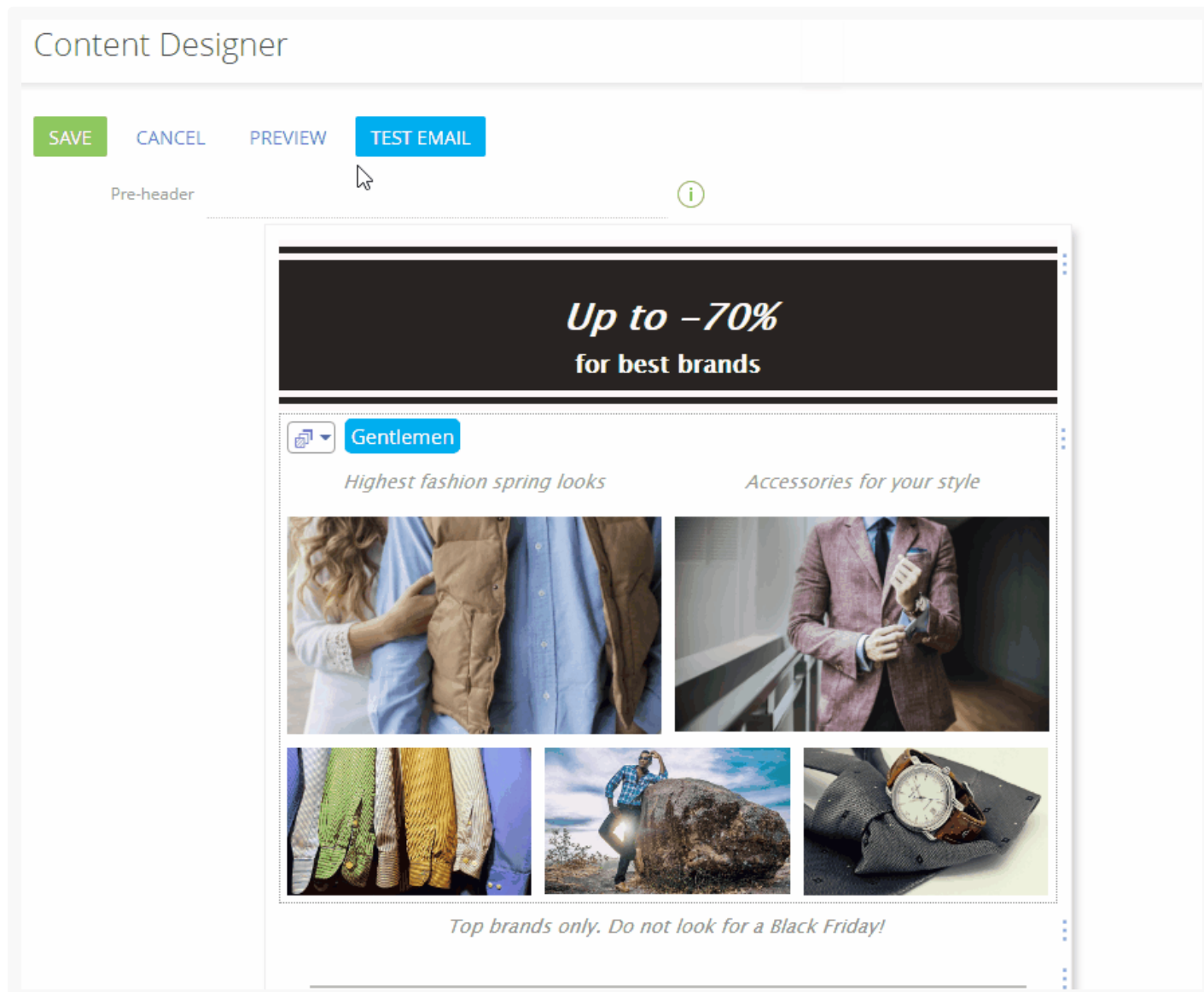
once more or update them.

4. Click [*Send*].

As a result, the test email will be sent to the specified addresses. You can send test emails from the Content Designer in a similar way.

If you send test emails with **dynamic content**, the “Send test email” window will display a [*Test email template settings*] field (Fig. 2). Choose between sending the current email template version or all template versions in this field.

Fig. 2 Sending a test email with dynamic content



Note. Learn more about how to create emails with dynamic content in the [Configure dynamic content for marketing emails](#) article.

Send a system email

PRODUCTS: **MARKETING**

Use this function to send important non-marketing emails, such as notifications about updates or service unavailability. System email ignores the “Do not use email” checkbox if it is selected on the [*Communication channels*] tab of the recipient’s contact record and sends an email to the contact.

Use system emails to send only service, transaction emails and important customer notifications. Using system emails for marketing purposes might lead to issues with the domain reputation and decrease the email deliverability.

To convert a marketing email to a system email, select the [*System email*] checkbox on the [*Parameters*] tab when creating a new email (Fig. 1).

Fig. 1 [*System email*] checkbox on the email page

The screenshot shows the 'Urgent updates' email configuration interface. At the top, there's a search bar 'What can I do for you?' and a 'VIEW' dropdown. Below are buttons for 'SAVE', 'CANCEL', 'ACTIONS', 'START SENDING', and 'VIEW'. The main content area shows the email details: Name 'Urgent updates', Status 'Planned', Recipients '0', and Send time 'run manually'. A navigation bar includes 'TEMPLATE', 'AUDIENCE', 'PARAMETERS' (selected), 'CLICK STATS', 'EMAIL TOTALS', 'ATTACHMENTS AND NOTES', and 'FEED'. Under 'PARAMETERS', there are fields for 'Email type' (Focus email), 'Owner' (Supervisor), 'Campaign', and 'Split test'. A section for 'Email-to-website clicks tracking' includes a 'Use UTM tracking codes' checkbox and a 'List of domains' field with 'www.example.com'. Below this are fields for 'utm_source', 'utm_campaign', 'utm_medium' (set to 'email'), 'Finished on', 'Started on', 'Duration', 'utm_term', and 'utm_content'. The 'System email' checkbox is highlighted with a red box.

Note. By default, the [*System email*] checkbox is displayed on the email page. Use the “Enable option “System email” system setting to hide the [*System email*] checkbox.

Configure restriction of the number of

emails for sending

PRODUCTS: **MARKETING**

Adjust the email restriction settings and your customers will not receive an excessive number of emails from your company. It helps to reduce spam complaints. For example, you can configure sending of no more than 2 emails per day and no more than 10 emails per month.

Note that the configuration is based on the email category – you need to set up separate email sending restrictions for bulk and trigger emails. If you want to configure the same restrictions for all email types, create two identical rules of [*Bulk email*] and [*Trigger email*] categories (the [*Email category*] column).

To set up:


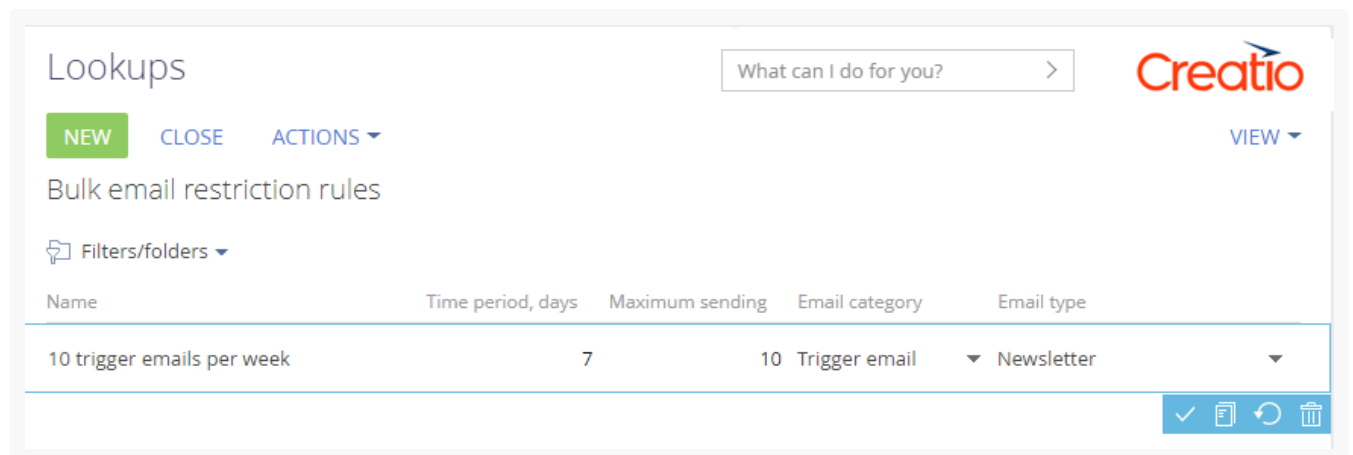

1. Open the system designer by clicking the  button.
2. Go to the [*System setup*] block → click **Lookups**.
3. Open the **Bulk email restriction rules** lookup.
4. Click the **New** button to create a rule.
A new string appears in the editable list.
5. Specify the values of the new record in the new string (Fig. 1):
 - a. **Name** – specify the name of the rule. For example, “10 emails per week”.
 - b. **Time period, days** – specify the period (days) for the email restriction.
 - c. **Maximum sending** – specify the maximum number of emails that can be sent to the contact during a specified time.
 - d. **Email category** – specify the category that the restriction applies to: “Bulk email” or “Trigger email”.
 - e. **Email type** – select the type of emails that the restriction applies to. This column displays values from the [*Email type*] lookup.

Fig. 1 Configure restriction of the number of emails for sending



6. Click the  button to save the added record.
7. Repeat these steps for each new rule.

You can create an unlimited number of rules. All rules added to the lookup are considered to be active.

Creatio checks whether marketing communication has been reached for each recipient, whenever a new marketing email is sent. If at least one of the thresholds is reached for a recipient, the system will not send another email to this recipient and set "Communication limit" as their response.

Permit monitoring the email status by Creatio support


PRODUCTS: **MARKETING**

We recommend that you set up monitoring of your email status by the support service before you start working with emails. If you do this, Creatio support will be able to resolve any potential bulk email issues faster. Support service employees will have access to aggregated bulk email metrics that do not contain personalized email message texts, email templates, etc.

The procedure is different for cloud and on-site applications.

Instructions for on-site applications are available in the [Set up marketing emails](#).

Instructions for cloud applications are as follows:

1. Open the system designer by clicking the  button.
2. Click "**System settings**" in the "System setup" block.
3. Open the "**Enable monitoring of the email troubleshooting indicators**" (EnableEmailIndicatorMonitoring) system setting and select the [*Default value*] checkbox.
4. Click [*Save*].


As a result, the support service employees will be able to identify and eliminate potential email issues and restore email sending.

Prevent sending duplicate emails to the same email address

PRODUCTS: **MARKETING**

If you have several recipients with the same email address in your database, you can merge duplicates and avoid sending emails to the same email address. Use the **Prevent to send duplicated emails to recipients with the same address** system setting for this purpose. If the system setting is enabled and the email audience has several contacts with the same email address, Creatio will send a single email to one of these contacts, selected at random. The email response of the rest of the contacts with the same email address will be "Canceled (Duplicate email)."

The setup procedure is as follows:

1. Open the system designer by clicking the  button.
2. Click "**System settings**" in the "System setup" block.
3. Open the "**Prevent to send duplicated emails to recipients with the same address**"

("PreventDuplicatesSending" code) system setting and select the [*Default value*] checkbox on the opened page.

4. Click [*Save*].

As a result, Creatio will search for duplicate email addresses before sending **bulk emails**. If Creatio detects the same email address for several contacts, the email will be sent to only one of them.

Creatio removes duplicate email addresses from **trigger emails** only in the same campaign launch. If an email address that has already received a trigger email is included in another campaign launch, for example, after a re-entry, Creatio sends another trigger email to the email address.

Set up periods for processing email responses

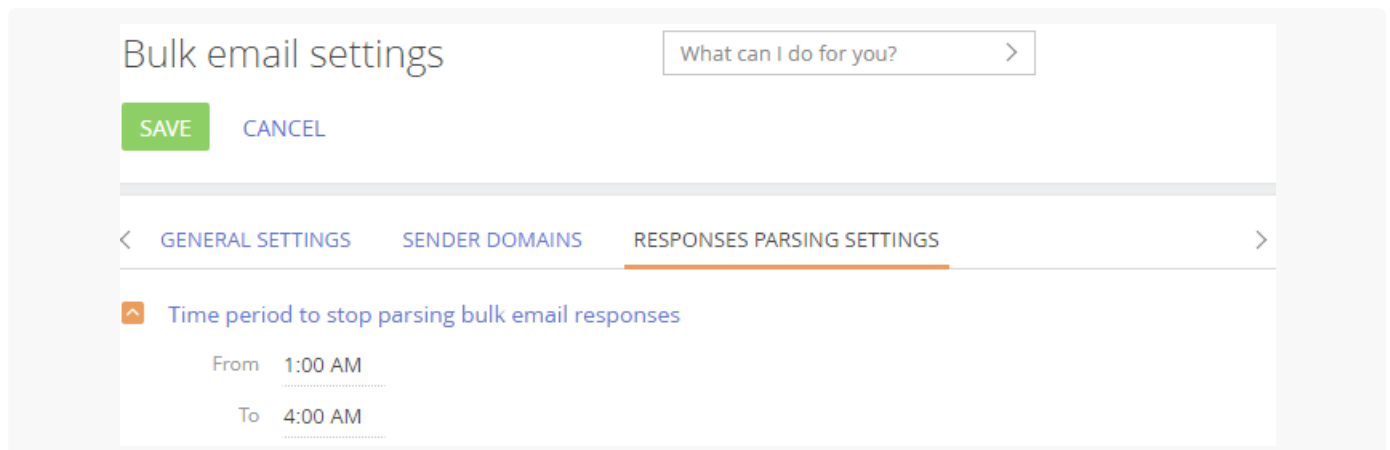
PRODUCTS: **MARKETING**

By default, Creatio automatically processes email response data once per several minutes. We recommend that you **stop parsing email responses** for the time of integration sessions between Creatio and third-party systems to avoid data deadlocks. You can stop parsing every day at a specified time.

The setup procedure is as follows:

1. In the [*Emails*] section, select [*Bulk email settings*] in the [*Actions*] menu.
2. On the opened page, select the [*Response parsing settings*] tab and specify the time when the response parsing should be stopped. Specify the preferred time frame for parsing email responses in the [*From*] and [*To*] fields (Fig. 1). Save the changes.

Fig. 1 The [*Response parsing settings*] tab



At the figure above, you can see an example of settings enabling the response parsing process stop daily from 1:00 to 4:00 AM. The changes will apply as soon as you save the settings. In this case, the response parsing will resume at 4:01 am.

Response parsing time frames on this tab are displayed in the **current user's time zone**. The parsing process will stop in according to the time zone of the user, specified in the "**System operations user**" (SystemUser) system setting. The Supervisor user is specified in this system setting by default.

Note. Specify the time zone of a user in the user profile. Read more in the [“User profile”](#) article. The list of available time zones is configured in the [*Time zones*] lookup.

If you leave the [*From*] and [*To*] fields unpopulated or populate only one value, the response parsing process will be working continuously.

Manage subscriptions for various email types

PRODUCTS: **MARKETING**

If you use several types of content in your marketing emails, for example, newsletters, special offers and invitations, we recommend enabling subscriptions for particular content types. As a result, your customers will receive only the content that they are interested in. For example, a customer may sign up for special offers, but not give consent to receive news and invitations.

Attention. Subscriptions to different types of marketing emails are not available in the base Creatio configuration. An additional setup by a software developer is required.

Custom unsubscribe page must meet the following criteria:

- There must be a single page for the subscription setup. Users must not open additional pages to manage subscriptions to different types of marketing emails or unsubscribe from them.
- There must be an option to unsubscribe from all emails.

Additional recommendations:

- Brand the page by adding corporate name and logo.
- The page should have an option to provide comments as to the reason for unsubscribing.
- Make user authentication optional.

Below is a general description of the setup process for subscriptions to different emails.

1. Create a list of the email types in the **Email type** lookup.
2. Create pages on your website where the customer can express their consent to receive particular materials from your company. Set them up as the forwarding pages on your landings.
3. Clear the checkbox for the **“Unsubscribe user from all emails”** (UnsubscribeFromAllMailings) system setting. This is required to avoid automatic unsubscriptions from all emails when a recipient only unsubscribes from a particular type of email.

Note. The “Unsubscribe user from all emails” (UnsubscribeFromAllMailings) system setting is used for adding the automatic unsubscribe block to the email template and the correct functioning of the unsubscribe link. It is recommended to clear the value of this system setting unless you set up different

types of emails as part of developer customization.

4. Specify the address of the unsubscribe page in the “Website to redirect unsubscribed” system setting.
5. Set up the integration of the created page with Creatio. Such integration is performed by Creatio development tools.

After the setup is complete, information about subscription limitations for different types of email will be displayed on the **Email subscription** detail of the contact page. You can also use the [*Email subscription*] detail to manually specify the email types that the user has unsubscribed from on the [*Email subscription*] detail of the contact page.

Set up objects that form email audience

PRODUCTS: **MARKETING**

You can import the contacts that are connected to various objects to the email audience. “Contact”, “Lead”, “Event participant” objects are available by default. You can also add new objects, such as “Account” or “Order”. If you add a new object, Creatio will add to the email audience the contacts connected to that object's records. Read more about forming the bulk email audience: [Add bulk email audience](#).

To import contacts, you first need to specify the object used to form the audience and set up how the object is connected to Creatio contacts. Any Creatio user with permissions to “Access to “Lookups” section” (“CanManageLookups” code) system operation can perform the setup. Read more: [System operation permissions](#).

To add a new object:

1. Navigate to the [*Audience*] tab of the email page, click + and select [*Manage objects*].
2. Click [*New*] in the top left of the newly-opened page. This will add an empty record to the [*Manage objects for audience import*] lookup.
3. Fill out the new record's fields (Fig. 1):
 - a. [*Object caption*] — specify the name to be used in the object list on the [*Audience*] tab of the email page. For example, “Account”.
 - b. [*Entity object*] — select the Creatio object that will be used to form the email audience. For example, “Account”.
 - c. [*Contact column path*] — select the object's field that contains the contact data. The contact specified in this field will receive the email. For instance, there is contact data in the [*Primary contact*] field of the “Account” object.
 - d. [*Email column path*] — specify the path to the [*Email*] field of the contact page.

Fig. 1 [*Manage objects for audience import*] lookup

Object caption	Entity object	Contact column path	Email column path
Account	Account	PrimaryContact	PrimaryContact.Email
Contact	Contact		Email
Lead	Lead	QualifiedContact	Email
Event participant	Event participant	Contact	Contact.Email

The record is saved automatically. This will add a new audience-forming object to the + button's menu on the [Audience] tab of the email page.

Set up the email expiration date

PRODUCTS: **MARKETING**

Specify the date and time when Creatio will stop sending the email regardless of its completion state. This is important for time-sensitive offers or event invitations.

You can set up the expiration date before Creatio starts to send the email.

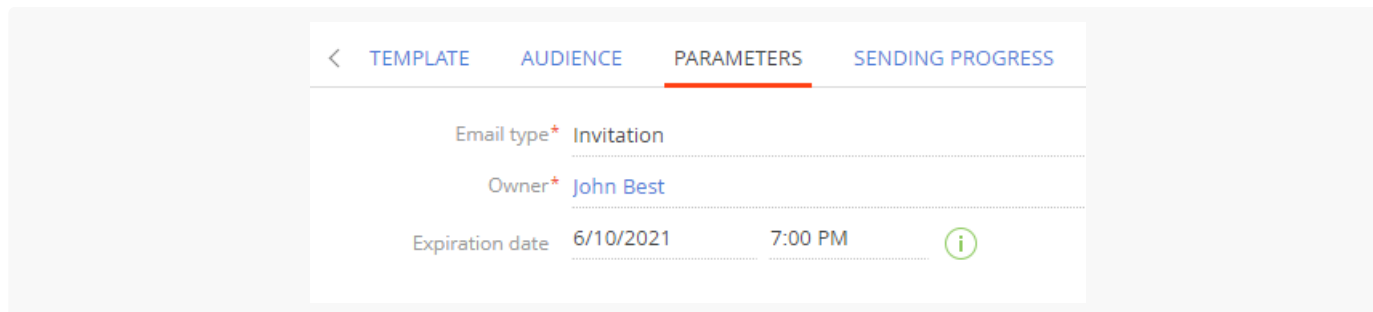
The expiration date settings are identical for bulk emails and trigger emails.

Note. Toggle on the “BulkEmailThrottlingQueue” system setting to enable them in beta testing mode. Learn more: [Add, enable, and disable functions](#). The “Bulk email expiration period (minutes)” (the “BulkEmailExpirationPeriod” code) was deprecated and retired. Follow the steps below to set up the email expiration date.

To set up the expiration date:

1. Go to the [Email] section and open the needed record.
2. Specify when to stop sending the email in the [Expiration date] field on the [Parameters] tab (Fig. 1).
3. Click [Save].

Fig. 1 Setting up the expiration date



As a result, Creatio will stop sending the email on the date and time specified in the [*Expiration date*] field. Creatio will change the bulk email status to [*Expired*]. It will not be possible to resend the email to the remaining contacts. Creatio will mark the remaining contacts with “Stopped (time to send expired)” [personal response](#).

If the campaign connected to trigger emails remains active, Creatio will keep adding participants to the audience. These participants will be marked with “Stopped (time to send expired)” personal response. You can use this to set up further conditional flows. For example, send another email to all contacts with “Stopped (time to send expired)” personal response.

If you leave the [*Expiration date*] field empty, Creatio will not stop sending the email.

Set up the email priority

PRODUCTS: [MARKETING](#)

You can specify the priority of an email record in Creatio. Use this feature to manage the mailing order. Creatio sends emails with higher priority sooner. For example, you can set up the priority so that Creatio sends confirmation emails before newsletters.

You can set up the email priority before Creatio starts to send the email.

Priority settings are identical for bulk emails and trigger emails.

Note. These features are available since Creatio version 7.17.4. Toggle on the “BulkEmailThrottlingQueue” system setting to enable them in beta testing mode. Learn more: [Add, enable, and disable functions](#).

These features are available out-of-the-box in Creatio 7.18.0.

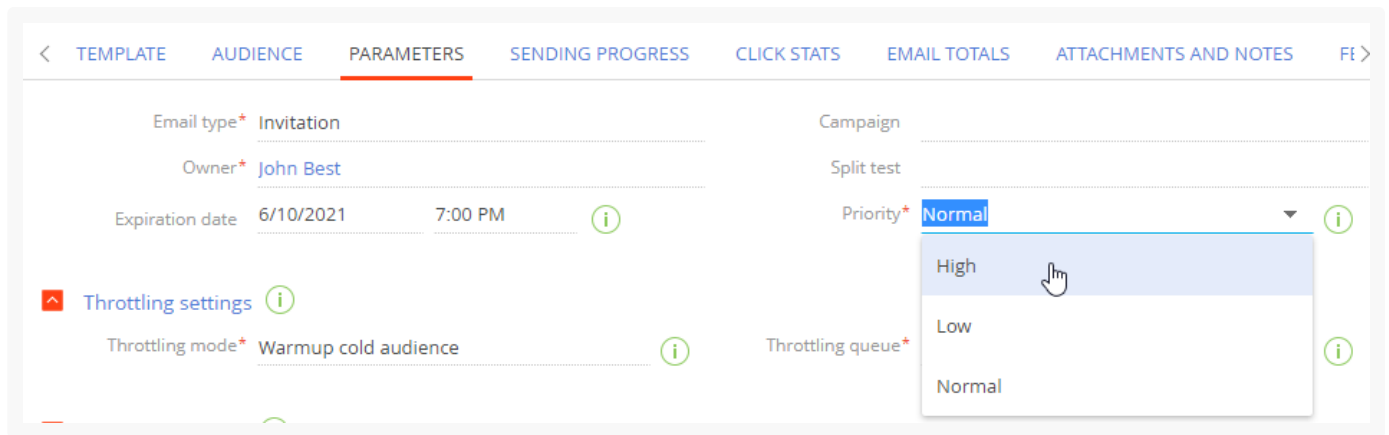
To set up the email priority:

1. Go to the [*Email*] section and open the needed record.

Select the required value in the [*Priority*] field on the [*Parameters*] tab (Fig. 1). The value is “Normal” by default.

Click [*Save*].

Fig. 1 Setting up the bulk email priority



As a result, Creatio will use the value in the [*Priority*] field to calculate the sending order. Creatio sends the higher priority emails before lower priority emails.

If the user sends multiple bulk emails with the same priority simultaneously, the email that reached the cloud email service sooner will be sent first.

You can select one of the pre-configured priorities or **add custom priority values** and use them in the future. To do so:


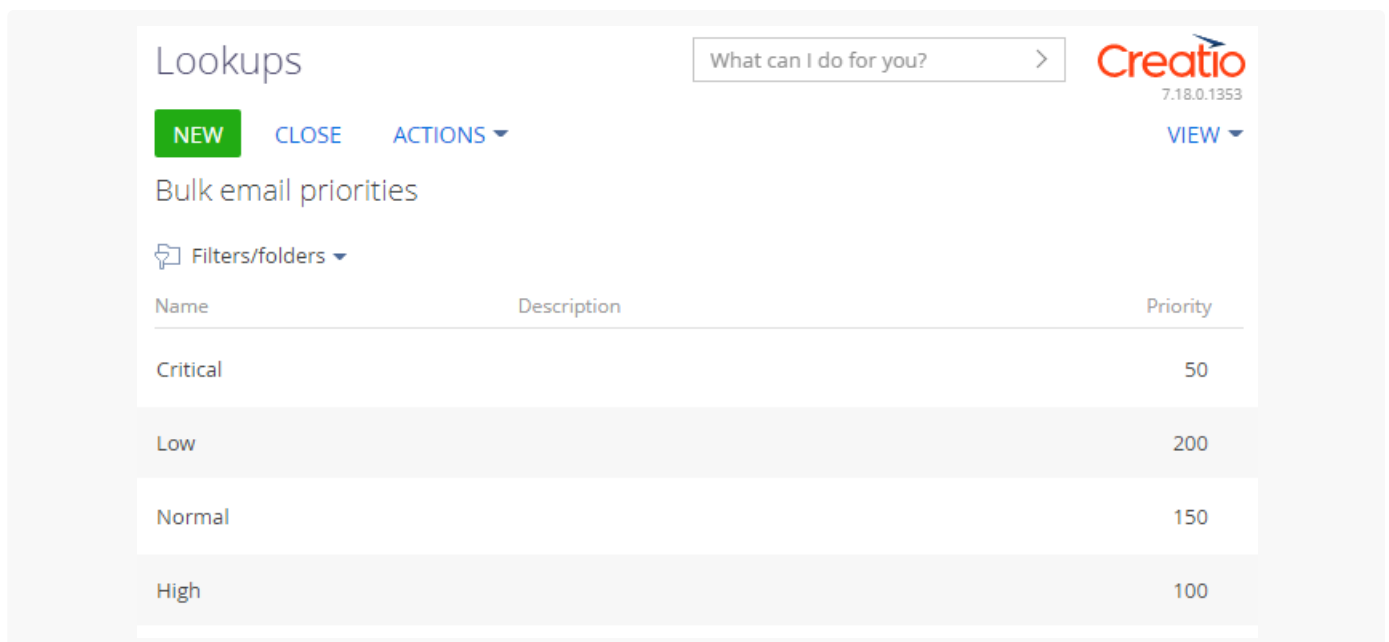
1. Open the system designer by clicking  in the top right.
2. Click [*Lookups*] in the [*System setup*] block.
3. Open the [*Bulk email priorities*] lookup.
4. Click [*New*].
5. Enter the priority name, for example, "Critical." Fill out the [*Description*] column if necessary.
6. Specify the needed value in the [*Priority*] field. The lower the value, the higher the email priority (Fig. 2).

Fig. 2 Adding a new value to the [*Bulk email priorities*] lookup



Attention. We recommend against changing or deleting the pre-configured values since this can affect

the sending order of active bulk emails. Add a new lookup entry with a different priority value instead.

Set up the email delivery schedule

PRODUCTS: **MARKETING**

Creatio lets you customize the email send time and delivery schedule. The values specified in the [email send time](#) settings determine the time when Creatio passes the emails to the cloud service. The email delivery schedule determines when the cloud service passes emails to the email provider. This lets you schedule when the end recipients get the emails. This is useful for things like limited-time offers.

You can set up the email delivery schedule before Creatio starts to send the email.

Delivery schedule settings are identical for bulk emails and trigger emails.

Note. These features are available since Creatio version 7.17.4. Toggle on the “BulkEmailThrottlingQueue” system setting to enable them in beta testing mode. Learn more: [Add, enable, and disable functions](#).

These features are available out-of-the-box in Creatio 7.18.0.

To set up the delivery schedule:

1. Go to the [*Email*] section and open the needed record.

Click the [*Parameters*] tab and go to the [*Delivery schedule*] detail. By default, the cloud service passes the emails to the email provider “Every day” from 12:00 AM to 11:59 PM. The recipients get the emails 24/7. You can specify other parameters:

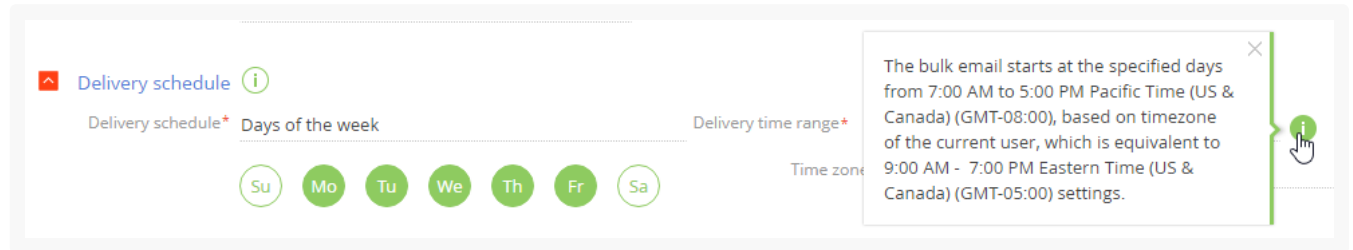
- Select “Every day” or “Days of week” in the [*Delivery schedule*] field. If you select “Days of week,” a widget for selecting delivery days will appear. For example, you can select weekdays only (Fig. 1)
- Fill out the [*Delivery time range*] field to specify the email delivery period. If you do not specify the time frame or keep the default value, the email delivery will start as soon as the cloud service processes the emails. For example, if you start the email at 8:00 AM and set up the delivery time frame between 9:00 AM and 7:00 PM, none of the emails will be delivered before 9:00 AM. If you keep the default value (from 12:00 AM to 11:59 PM), the delivery will start at approximately 8:05 AM (the average email processing time is 5 minutes).
- Fill out the [*Time zone*] field to set the reference time zone for the delivery time range. The time zone of the user who created the email is used by default. You can change this value. For example, if you are in Los Angeles (GMT -08:00) and plan to send emails based on New York’s time zone (GMT -05:00), specify GMT -05:00, as displayed in Fig. 1.

Fig. 1 Setting up the delivery time range

The screenshot shows a configuration panel for the 'Delivery schedule'. At the top, there is a red close button and an information icon. Below that, the 'Delivery schedule' field is set to 'Days of the week'. To the right, the 'Delivery time range' is set to 'from 9:00 AM to 7:00 PM'. Below the 'Days of the week' field, there are seven circular buttons representing the days of the week: Su, Mo, Tu, We, Th, Fr, and Sa. The 'Time zone' field is set to 'Eastern Time (US & Canada) (GMT-05:00)'. There are also information icons next to the 'Delivery time range' and 'Time zone' fields.

Hover over the icon to the right of the [*Time range*] field to check the time zone settings. The tooltip will display the delivery time frame based on the time zone of the current user (Fig. 2).

Fig. 2 The delivery time frame based on the time zone of the current user



As a result, the recipients will get the emails within the specified time frame according to their time zone.

Attention. Creatio starts to send emails based on the user's time zone. Time zone settings only apply to the [*Delivery time range*] field group and affect the time when the cloud service passes the emails to the recipients.

Set up the email throttling queue

PRODUCTS: **MARKETING**

Throttling balances the outgoing email flow in Creatio.

Use throttling to split a large email into multiple parts and send the parts to the email provider one by one during the specified time frame. This approach improves the delivery rate and prevents the emails from being flagged as spam or rejected by email providers. Use throttling when:

- Sending multiple emails during a short period.
- Sending emails to new subscribers.
- Sending emails to subscribers you have not contacted by email for a long time.
- Sending first emails from a new domain.
- Sending emails after changing the sender's IP address.
- Sending a test email that has to be changed or canceled during the mailing process.
- Sending emails likely to increase the activity of users.

In these situations, sending emails gradually enhances the domain's reputation. The throttling mechanism also lets you control the outgoing email flow, which can be useful in cases like balancing the load on contact center agents who process the feedback (leads).


Creatio provides the following throttling modes:

- **"Warmup cold audience"** to send the emails using the pre-configured schedule. Learn more: [Warm up cold audience](#).
- **"Manual limit"** – Creatio will send the emails based on the specified daily limit. Learn more: [Manual limit](#).

Warm up cold audience

“Warmup cold audience” is a throttling mode where Creatio sends a limited number of emails daily after the email starts. There is a fixed delay before each email. The daily limit and the delay help to emulate manual emailing, which is essential to enhance the reputation of the sender’s domain.

The pre-configured warm-up schedule is based on the best throttling practices, such as emailing daily for 2 weeks and longer with a gradual increase in the number of emails per day.

To change this schedule, contact Creatio support and specify the new daily limit and delay. After the support team applies the changes, click the  button in the [*Delivery schedule*] field on the email page to view the updated schedule. We recommend that you only change this schedule for urgent reasons and with a basic understanding of warm-up strategies.

Note. If the email has more than 1 sender address (for example, set by a macro), Creatio will apply the schedule for each address individually. Learn more: [Warm-up examples](#).

Enable the warm-up mode

Configure the warm-up cold audience parameters before starting the email.


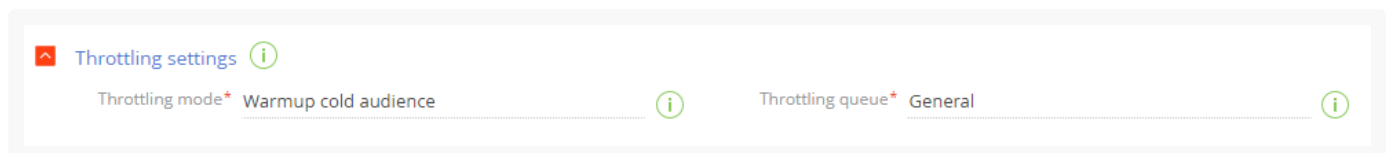
1. Go to the [*Email*] section and open the needed record.
2. Go the [*Parameters*] tab.
3. Select the “**Warmup cold audience**” value in the [*Throttling settings*] field. Click the  button in this field to view the email delivery schedule.
4. Select one of the shared queues in the [*Throttling queue*] field. Creatio sends all emails in a queue independent of the other throttling queues. Learn more: [Set up a distribution queue](#) and [Warm-up examples](#). The “General” value is selected by default (Fig. 1). This is a required field.

Fig. 1 Setting up a throttling queue




5. Click [*Save*].

As a result, Creatio will send the emails using the selected throttling mode.

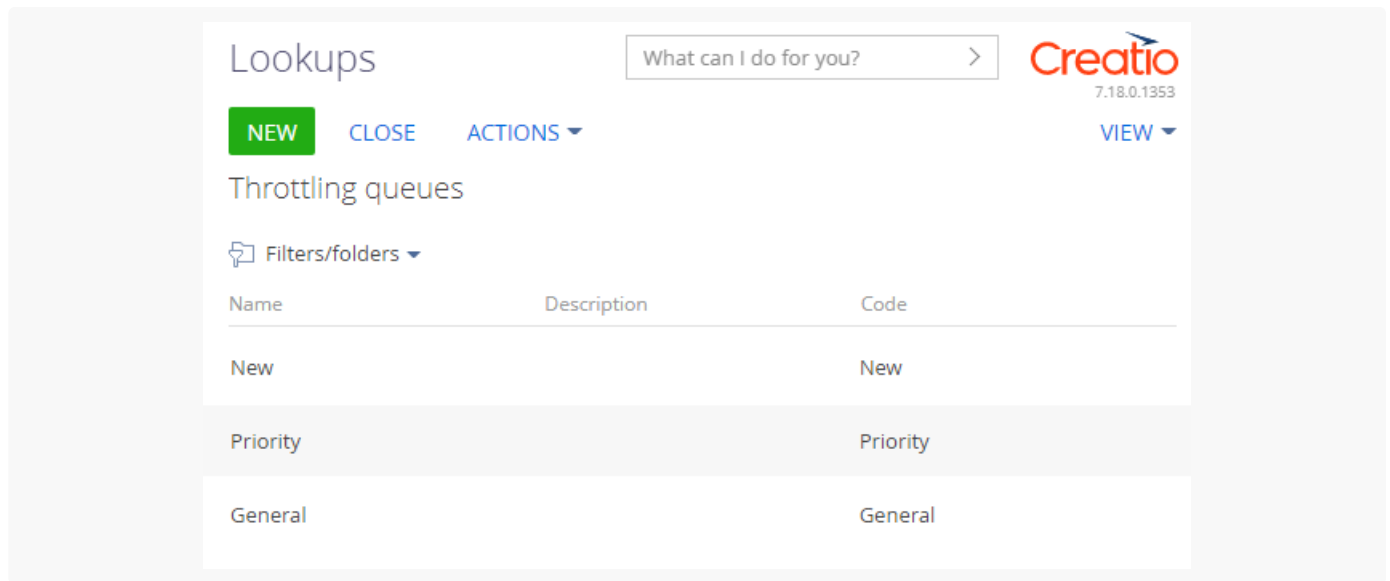
Set up a throttling queue

A throttling queue is a tool to segment cold contacts. Throttling queues let you group several bulk or trigger emails to segment different pools of cold contacts for individual warm-ups. For example, a part of the audience originates from social networks and another part from a webinar. In this case, we recommend dividing the audience into different segments and create a dedicated throttling queue for each segment to keep the email marketing strategies separate. Learn more: [Warm-up examples](#). Configure the queues in the [*Throttling queues*] lookup. To add a new queue:

1. Open the system designer by clicking  in the top right.

2. Click the “Lookups” link in the “System setup” block.
3. Open the [*Throttling queues*] lookup.
4. Click [*New*].
5. Enter the queue name, for example, “New queue.” Fill out the [*Description*] column if necessary.
6. Fill out the [*Code*] field with an alphanumeric code (Fig. 2). Creatio will use the code to segment bulk emails. You can use arbitrary names.

Fig. 2 Adding a new throttling queue



Attention. We recommend against modifying codes of existing lookup entries since this can affect the active bulk and trigger emails. To specify another code, add a new lookup entry and select this throttling queue when creating an email record.

Warm-up examples

Find detailed examples of the warm-up mode in action below.

Day	Daily email limit	The delay between emails, sec
1	25	400
2	25	400
3	25	400
4	50	400
5	50	400
6	75	400
7	75	400

Example 1

Send the “Newsletter” bulk email to 100 recipients. Use the “General” throttling queue. Two sender addresses will be used: sender1@example.com (75 recipients) and sender2@example.com (25 recipients).

Creatio will use a separate schedule for each sender's **email address**.

The bulk email will start from the Day 1 schedule for the “Warmup cold audience” mode. Emails from sender1@example.com will be sent in 3 days (25 emails per day). Emails from sender2@example.com will be sent in 1 day (25 emails per day).

Example 2

Send a “Webinar invitation” bulk email to the same contacts. Add a new sender address. Split the audience between the senders as follows: sender1@example.com (50 recipients), sender2@example.com (25 recipients), and sender3@example.com (25 recipients).

Emails to **new sender addresses** always start from the Day 1 schedule. If you have already used an email address for sending bulk emails, its schedule will start from the day where the previous bulk email stopped:

- All emails from sender3@example.com will be sent in 1 day (25 emails per day) according to the schedule, starting from Day 1.
- All emails from sender2@example.com will be sent in 1 day (25 emails per day) according to the schedule, starting from Day 2.
- All emails from sender1@example.com will be sent in 2 days (50 emails per day) according to the schedule, starting from Day 4.

Example 3

Add 100 new recipients to the “Webinar invitation” bulk email contact audience and create the “New” throttling queue. Use 2 sender addresses: sender1@example.com (75 recipients) and sender2@example.com (25 recipients).

When **changing the throttling queue**, the email delivery always starts from the Day 1 schedule, even if you have already used the addresses in this bulk email:

- All emails from sender1@example.com will be sent in 3 days (25 emails per day).
- All emails from sender2@example.com will be sent in 1 day (25 emails per day), starting from Day 1.

Attention. Create a new throttling queue for each new audience segment to avoid disrupting the audience warm-up procedure.

Manual limit

“Manual limit” is a throttling mode that lets you specify the uniformly distributed email sending parameters. Use it to balance the load on the website or your support agents who process the email’s responses (leads).

Select this mode to send the specified number of emails daily. You can limit the mode’s sending period by selecting the required values in the [*Delivery schedule*] field group. On the last delivery day, Creatio sends the rest of the messages, as long as their number is less than the [*Daily limit*] value.

Configure the manual limit parameters before starting the email.

Note. Starting from Creatio 7.18.2, you can edit the manual limit parameters for active emails. You can use this to set up a custom warm-up schedule with arbitrary limits, similarly to the cold audience warmup mode.

Example. Send a promo email to 100 recipients. The agents can process up to 16 responses daily (from 9:00 AM to 6:00 PM). Processing each response takes 30 minutes.

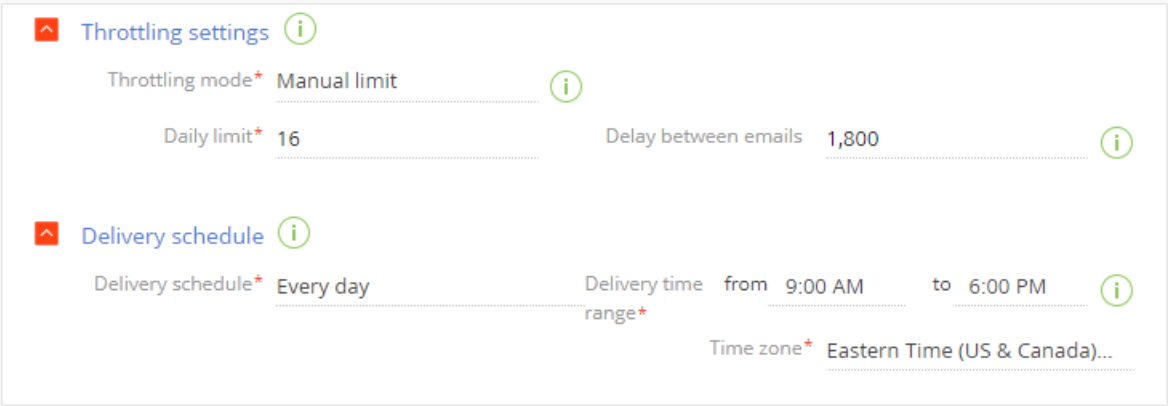
To set up these limits:

1. Go to the [*Email*] section and open the needed record.
2. Go to the [*Parameters*] tab.
3. Select “**Manual limit**” in the [*Throttling mode*] field.
4. Use the [*Daily limit*] field to specify the number of email responses the agents can process daily. For example, “16.” The field is required.
5. Use the [*Delay between emails*] field to set up an interval between emails based on the time an agent requires to process a lead, in seconds. For example, “1800.”
6. Use the [*Delivery schedule*] detail to specify the agents’ work schedule.

- a. Select “Every day” in the [*Delivery schedule*] field.
- b. Specify the period between 9:00 AM and 6:00 PM in the [*Delivery time range*] field.

Note. The [*Daily limit*] and [*Delay between emails*] fields, as well as the [*Delivery schedule*] settings are connected. The specified delivery time range must be longer than the period during which Creatio sends the daily number of emails, including the delays. If erroneous limits are specified, you will be unable to save and send the email. Should that happen, change the distribution settings according to the tooltips.

Fig. 3 Example of manual limit setup



The screenshot displays the 'Throttling settings' and 'Delivery schedule' sections of a configuration interface. The 'Throttling settings' section includes a dropdown for 'Throttling mode' set to 'Manual limit', a 'Daily limit' of 16, and a 'Delay between emails' of 1,800. The 'Delivery schedule' section includes a dropdown for 'Delivery schedule' set to 'Every day', a 'Delivery time range' from 9:00 AM to 6:00 PM, and a 'Time zone' set to 'Eastern Time (US & Canada)'. Information icons (i) are present next to several fields.

Section	Field	Value
Throttling settings	Throttling mode	Manual limit
	Daily limit	16
	Delay between emails	1,800
Delivery schedule	Delivery schedule	Every day
	Delivery time range	from 9:00 AM to 6:00 PM
	Time zone	Eastern Time (US & Canada)...

7. Click [Save].

As a result, Creatio will take 7 days to finish the email. During the first 6 days, Creatio will send 16 emails daily. The remaining 4 emails will be sent on day 7.