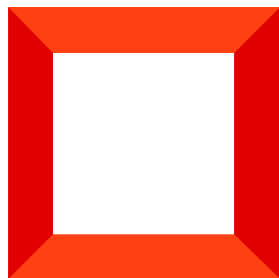
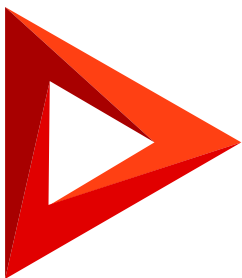


# Create an email

Create a trigger email

Version 7.17



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# Table of Contents

<b>Create a trigger email</b>	<b>4</b>
Fill out the trigger email data	4
Add a trigger email audience	5
Set up tracking of clicks from a trigger email	5

# Create a trigger email

PRODUCTS: **MARKETING**

Creatio sends **trigger emails** automatically when new participants are added as part of a campaign.

**Note.** You can only send trigger emails in Creatio automatically. You can also create a business process that will add participants to a trigger email. However, this requires custom coding.

For example, send a trigger email when a visitor signs up with your site. Use trigger emails to send interest-based messages tailored to a specific customer at a given moment: welcome emails, order confirmations, birthday wishes, sale end date reminders, etc.

## Fill out the trigger email data

1. Go to the [ *Email* ] section.
2. Click [ *New* ] and select [ *Trigger email* ].
3. Fill out the [ *Name* ] field – specify the name of the new trigger email. The name will be displayed in the [ *Email* ] section list only, the recipients will not see it (Fig. 1).

Fig. 1 Create a trigger email

The screenshot shows the 'Create a trigger email' interface in Creatio. At the top, the email is titled 'CRM Days conference reminder'. There are buttons for 'CLOSE', 'ACTIONS', 'OPEN DESIGNER', and 'TEST EMAIL'. The status is 'Planned' and the number of recipients is '0'. The audience source is set to 'Contact'. Below this, there are tabs for 'TEMPLATE', 'AUDIENCE', 'PARAMETERS', 'SENDING PROGRESS', 'CLICK STATS', 'EMAIL TOTALS', 'ATTACHMENTS AND NOTES', and 'FEED'. The 'TEMPLATE' tab is active, showing fields for 'TemplateName' (John Best), 'SenderEmail' (J.Best@creatio.com), 'Subject' (CRM Days are coming soon), and 'PreHeader'.

4. Set up the email template in the content designer. Learn more: [Create an email template](#).
5. Select the **email type** on the [ *Parameters* ] tab. The email type is used when performing a subscription to a specific type of content.

We recommend **sending test emails** before you start your email. This enables checking of macro values and contents display in the email. Learn more: [Send a test email](#).

## Add a trigger email audience

In Creatio, the audience of a trigger email is formed automatically based on the campaign audience and participant responses at a campaign step. The audience of a trigger email is formed when a participant moves to a campaign element that is connected to the corresponding trigger email. The campaign element adds participants based on the conditions you specify while setting it up. Learn more: [Campaign element reference](#).

In this case, the recipient's email is checked for validity. This is necessary to ensure that trigger emails are sent to only those contacts who are interested and to minimize the number of delivery errors. Learn more: [Start sending trigger emails](#).

## Set up tracking of clicks from a trigger email

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: "utm\_source," "utm\_campaign," and "utm\_medium."
3. In the "List of domains" field, specify the list of domains for which the tracking codes will be applied when generating the click link. You can specify multiple domains using commas (,).
4. Save the changes.