Send emails

Send emails via business processes

Version 7.17

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Send emails via business processes

PRODUCTS: ALL CREATIO PRODUCTS

You can send emails during process execution. Depending on the setup, you can do it in the following ways:

- Send emails manually. The user will see a new email page that has pre-populated fields upon reaching this step of the process.
- Send emails automatically.

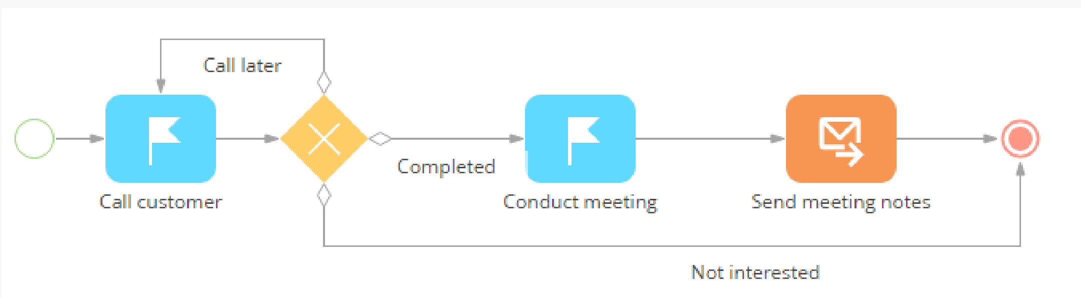
Use the [*Send email*] element to send emails both manually and automatically in your business processes.

Note. Be sure to set up email server integration to enable sending emails.

Send emails manually

Use manual email sending if you need to make changes (additions) to the email body or add attachments to it. Let's take a look at **sending emails manually** as part of a meeting process workflow (Fig. 1).

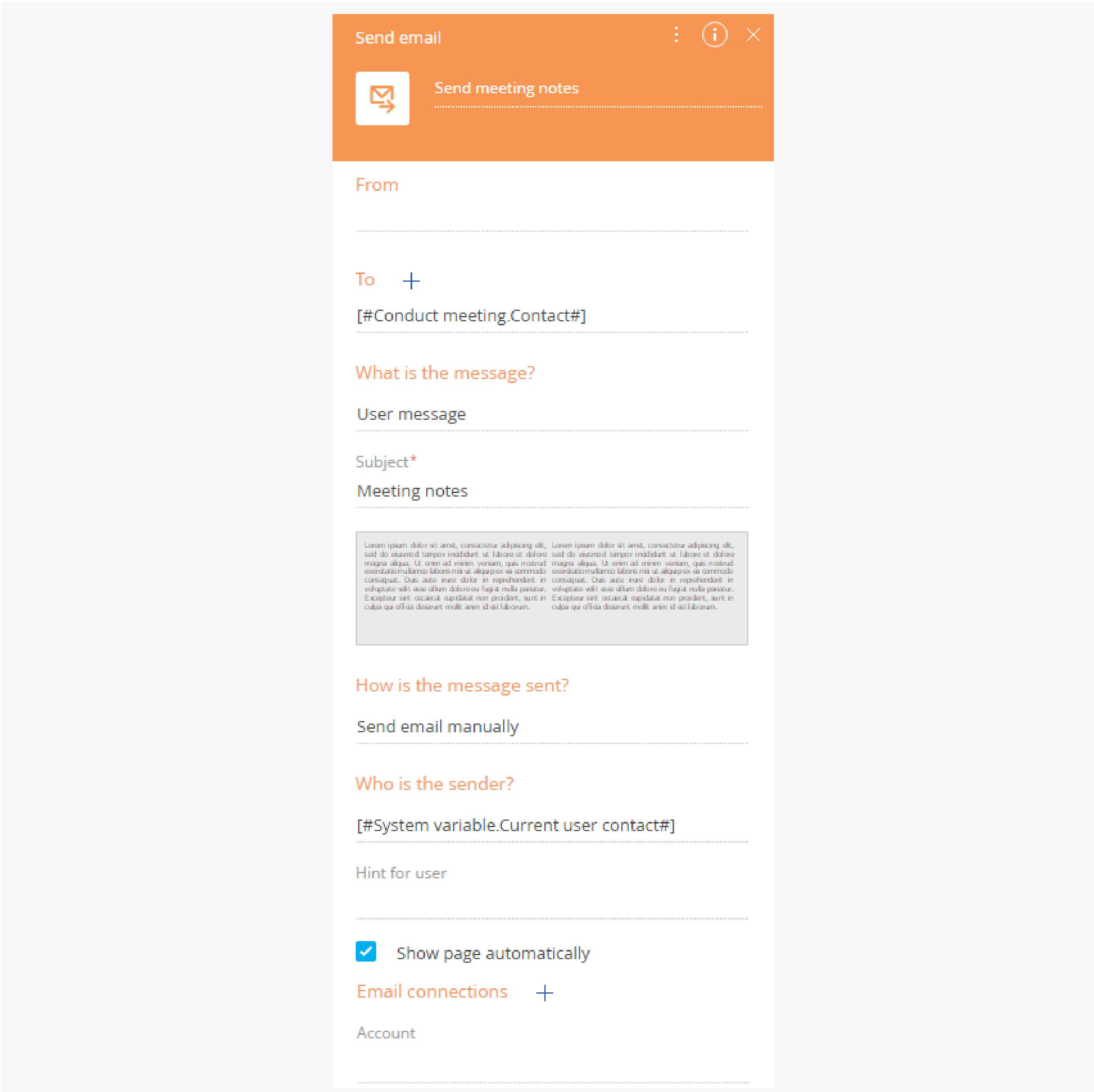
Fig. 1 Meeting process



Example. The customer must receive meeting minutes after the meeting. The process must open a new email page automatically where the user must enter minutes or attach them manually before sending the email.

1. Drag the [*Send email*] element of the [*User actions*] group to the business process diagram. Specify the parameter values on the [*Send email*] element setup area (Fig. 2):

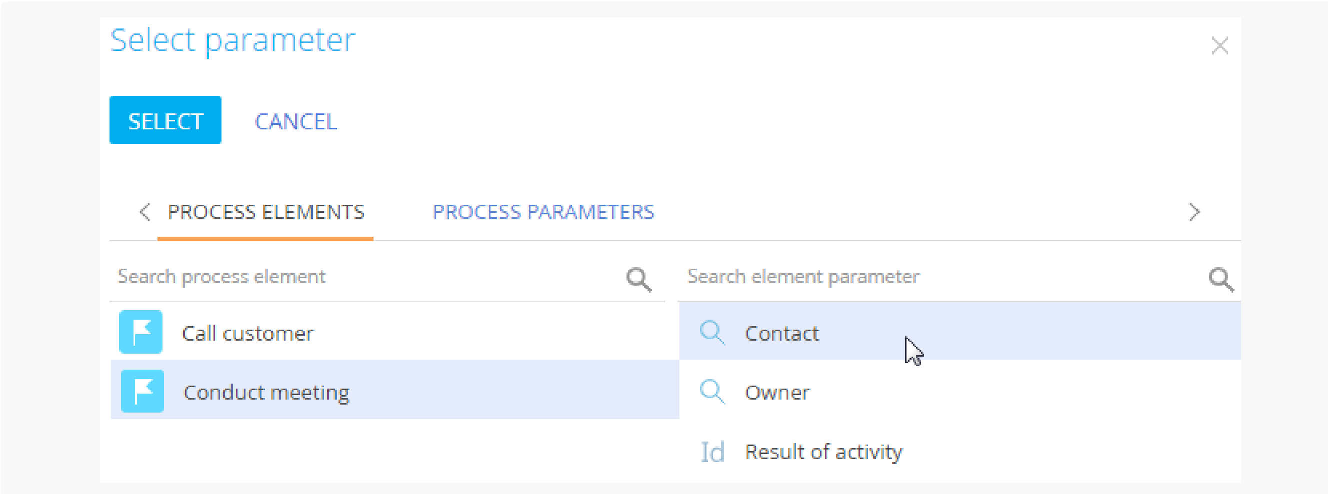
   Fig. 2 [*Send email*] element setup area



a. Select [*Lookup value*] in the [*From*] field to send the email from a corporate mailbox. Select the corporate mailbox account in the window that opens. If you leave the [*From*] field empty, the user who runs the process has to specify the sender email address in the [*From*] field on the edit page of the email.

b. Specify the recipient's email address in the [*To*] field. Select [*Contact*] → [*Process parameter*] in the parameter value menu. Specify the recipient's email address in the [*To*] field. Select [*Process parameter*] in the [*Contact*] menu. Select the [*Conduct meeting*] element and its parameter – [*Account*] (Fig. 3).

Fig. 3 Select the recipient’s email address



c. If you need to send the meeting minutes to several contacts, click the + button and add the [*Cc*] and [*Bcc*] fields. Specify the necessary recipients in the fields.

d. Select “Custom message” in the [*What is the message?*] field.

2. Enter the email content.

   a. Click the button in the email body area.

   b. Create your email in the Content Designer.

   c. Save the changes.

   d. Enter “Meeting minutes” in the [*Subject*] field.

   e. Select “Send email manually” in the [*How is the message sent?*] field.

   f. Select “Current user contact” in the [*Who is the sender?*] field to open the email edit page for the person responsible for the task.

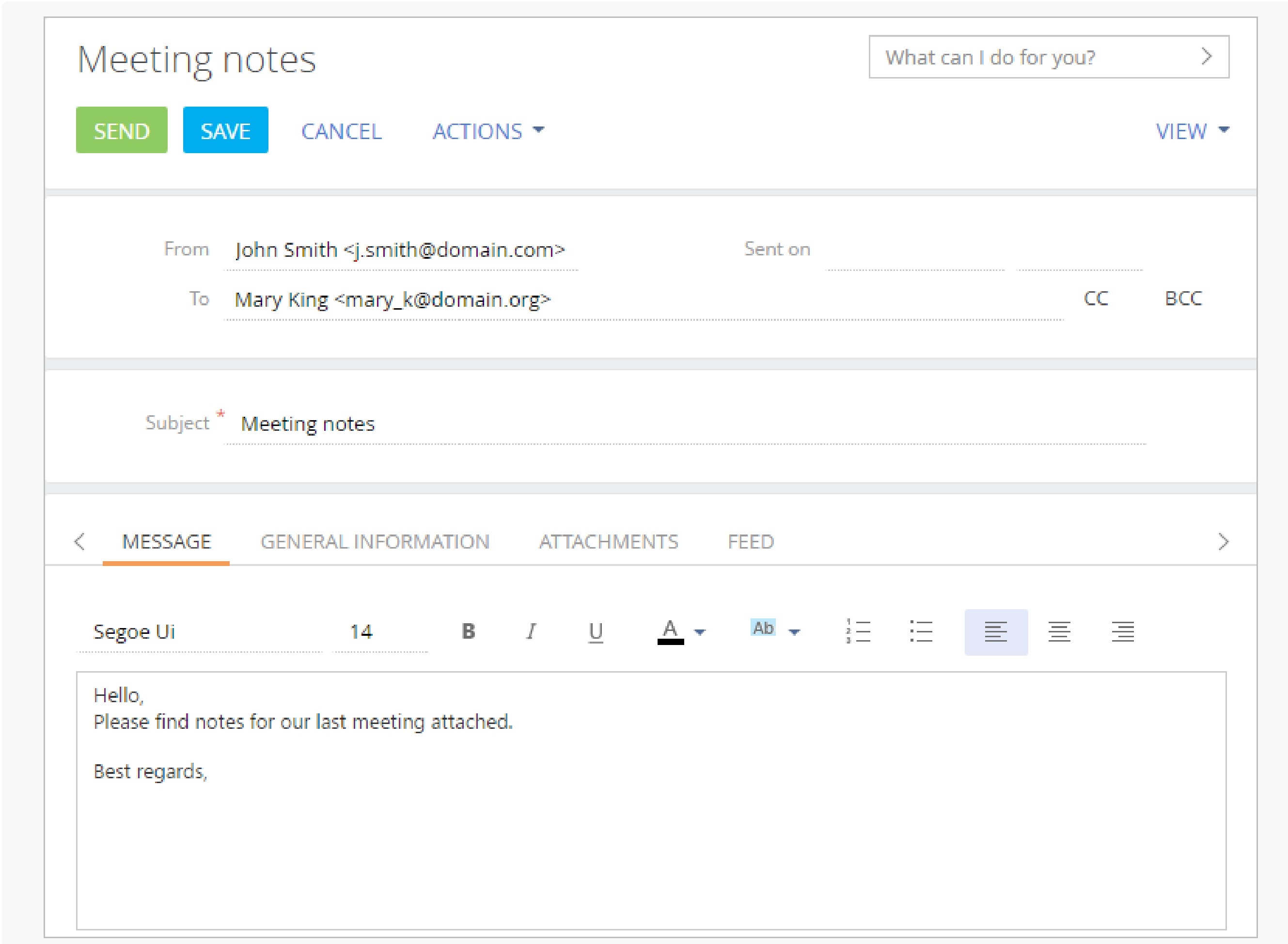
   g. Select the [*Show page automatically*] checkbox so the page appears for the responsible individual once they reach this part of the process. If the checkbox is cleared, the email is saved as a draft and not sent.

   h. Specify the account from the “Conduct meeting" activity in the [*Account*] field. Click the field and select [*Process parameter*] in the parameter value menu. Select the [*Conduct meeting*] element and its [*Account*] parameter. The sent email will be displayed on the [*History*] tab of the customer's account record.

   As a result, a new email page will open where you can enter needed changes and add the meeting minutes (Fig. 4).

> **Note.** If you enabled automatic email signatures, a signature will be added to the email body.

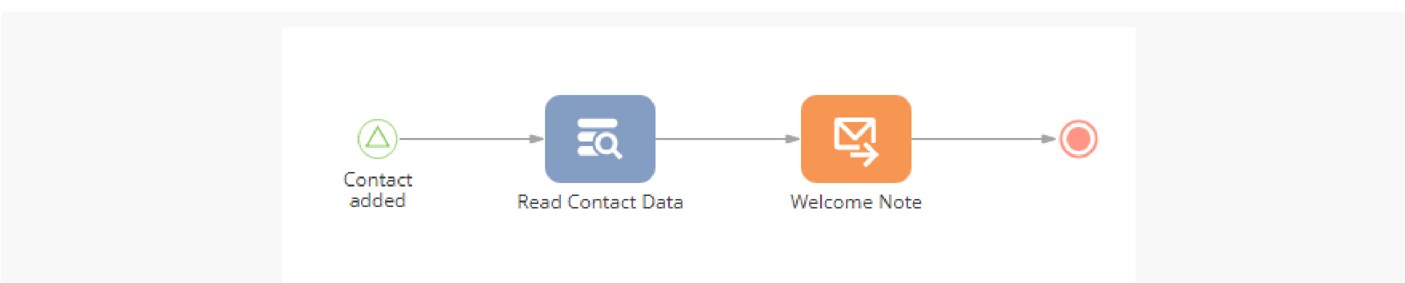
Fig. 4 Edit an email



Send emails automatically

While configuring a process that contains the [*Send Email*] element, you can choose to send emails automatically whenever a record is added, modified or deleted in Creatio. For example, each time a new contact is created, Creatio can send a “welcome email” to that contact (Fig. 5).

Fig. 5 “Welcome email” business process diagram

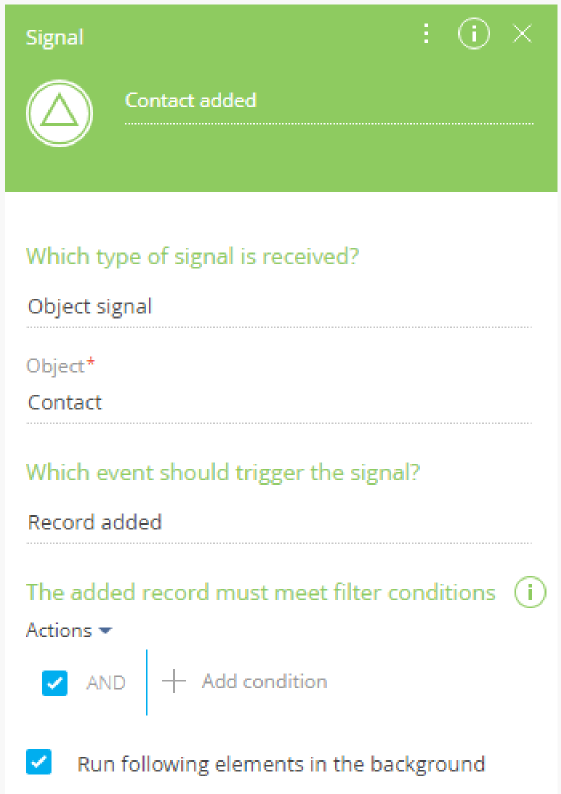


Use [*Signal*] start event to run business processes automatically, upon changes in Creatio records. Use the [*Send email*] element to send an email as part of a business process. If the email text must contain data from specific Creatio records, such as the data of the added contact, use the [*Read data*] element to retrieve that data in the process.

To send emails on cue:

1. Add the start event to the process diagram:
   a. Use the [*Start timer*] event to trigger the email sending either once at a specified time, or regularly with a specified frequency.
   b. Use the [*Signal*] start event to trigger the sending process on certain changes in Creatio, such as adding a contact (Fig. 6).

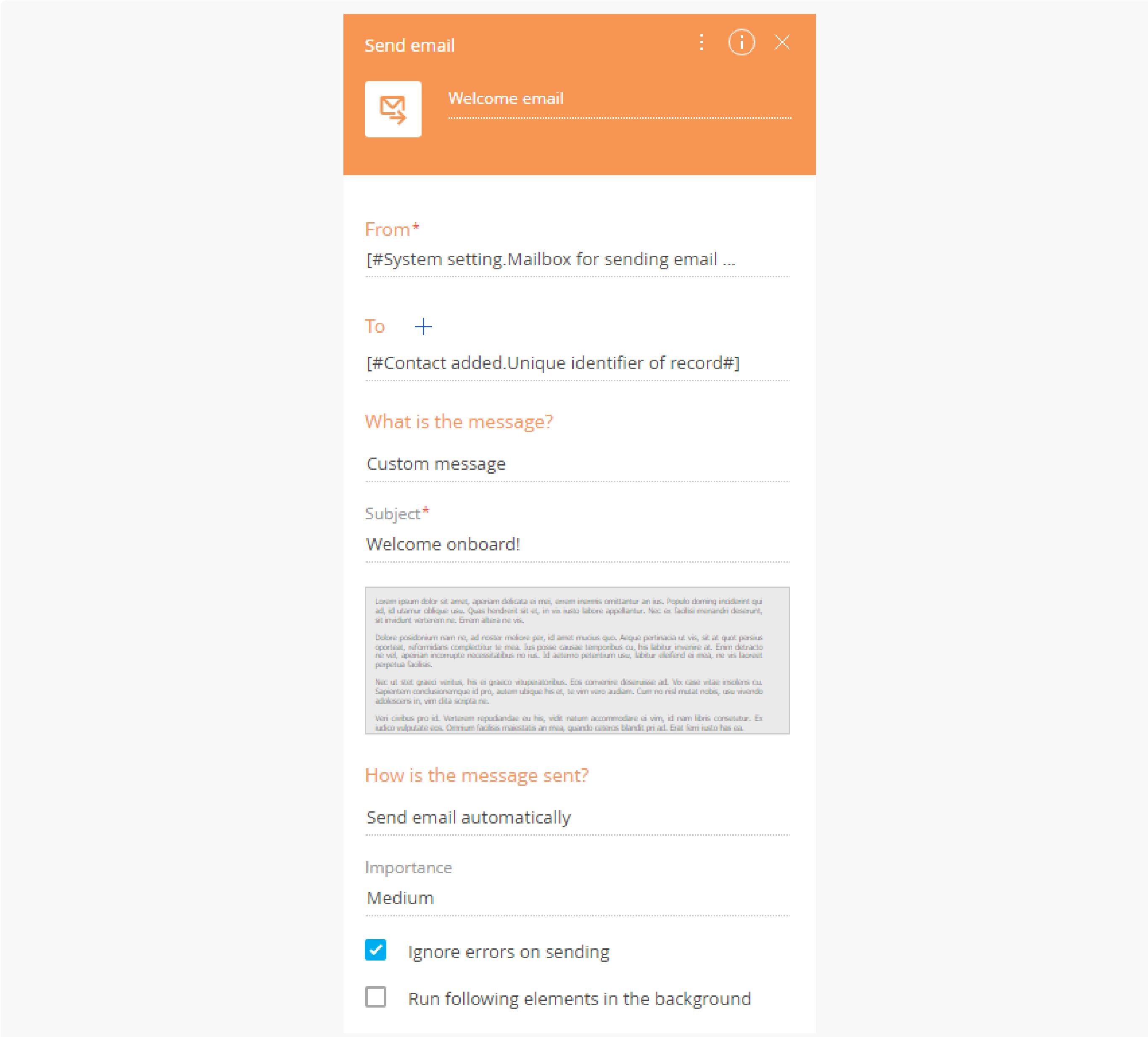
   Fig. 6 Start event properties

   In this case, the [*Signal*] start event is used to trigger the process once a contact is added to Creatio.

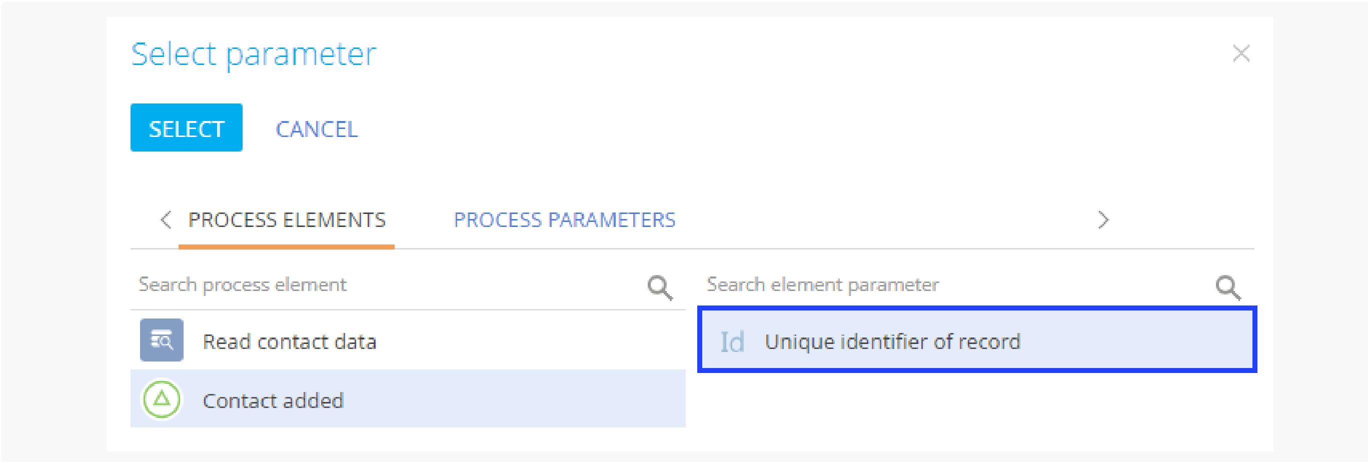
2. Add the [*Send Email*] element to the process diagram and fill out its fields (Fig. 7).

   Fig. 7 Set up the [*Send Email*] element properties



In this case, you can map the [*To*] field to the [*Id of created record*] parameter of the [*Signal*] start event, and send emails to the newly created contacts. To do this, hold the pointer over the [*To*] field and click , then select [*Contact*] → [*Process parameter*]. In the menu that appears, select [*Process parameter*]. In the window that appears, select the “Unique identifier of record” parameter of the [*Signal*] start event (Fig. 8).

Fig. 8 Map the [*To*] field to the ID of a contact record that triggered the [*Signal*] start event



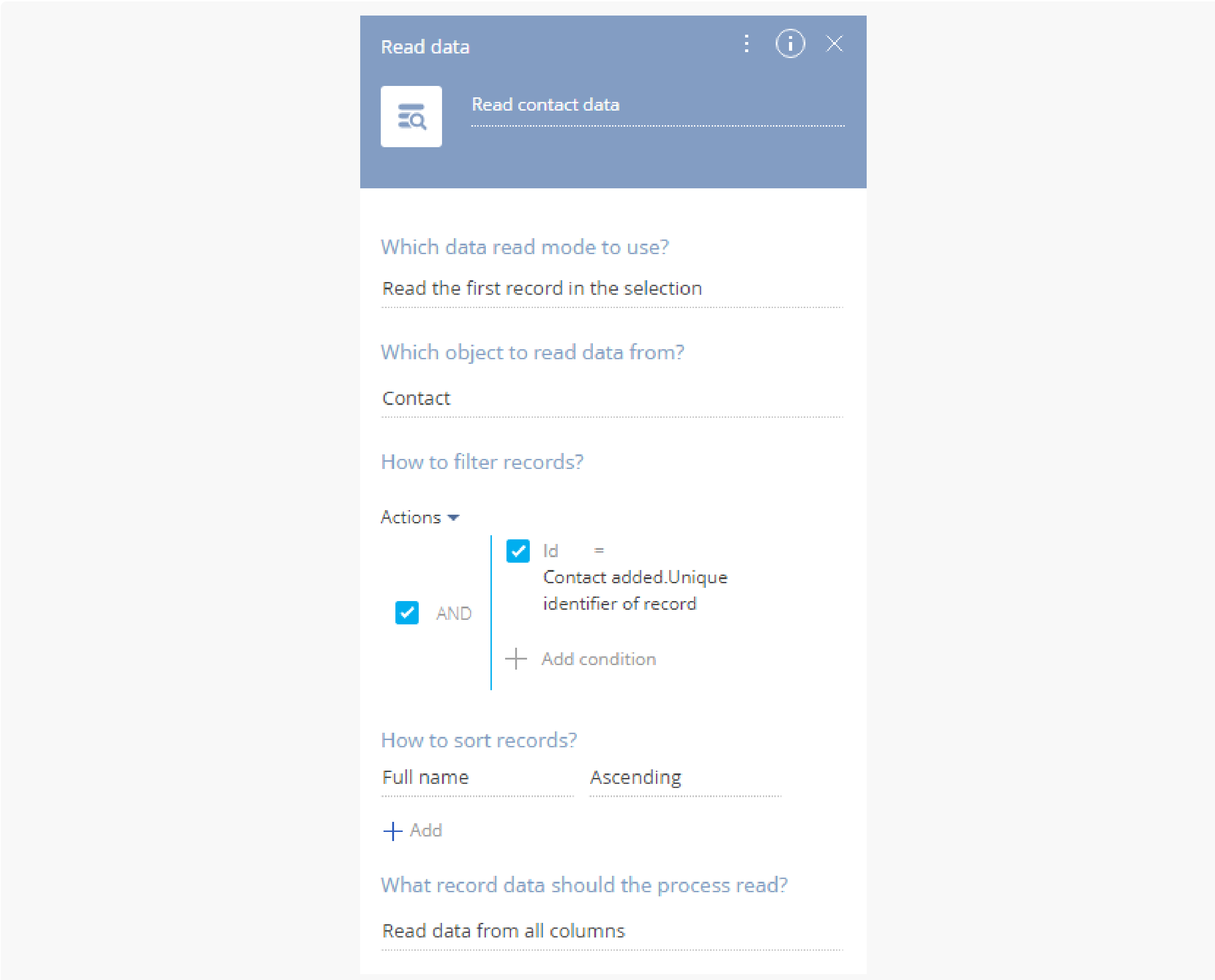
3. Select one of the following options depending on the desired outcome:

   a. If you choose to send a message that **uses** process parameters or macros, add the element that can get these values from the Creatio database.

   b. If you choose to send an email that **does not** use macros or other process parameters, simply connect the [*Signal*] element to the [*Send Email*] element.

   For example, if you need the name and email address of the newly added contact, place the [*Read Data*] element (Fig. 9) on the diagram and read the data of the contact who triggered the process. The data will be recorded into the element’s outgoing parameters, which you can then use as macros in the email body.

Fig. 9 Set up the [*Read Data*] element properties



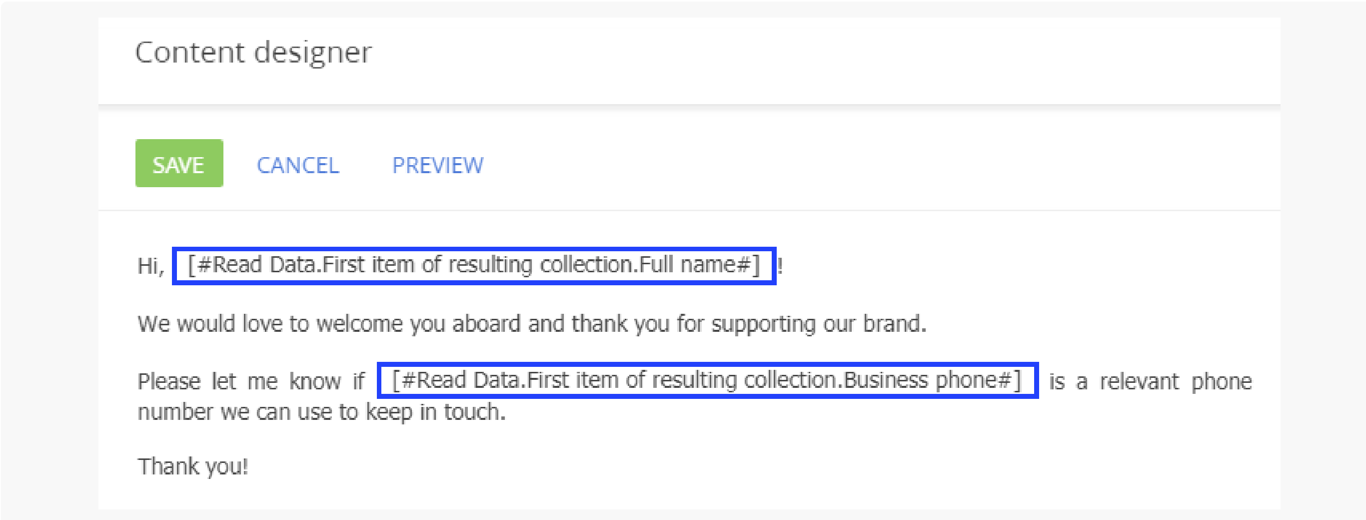
4. Save the process diagram.

   As a result, the email will be sent upon certain changes / user actions in Creatio. In this case, all newly added contacts will receive a welcome email.

5. Use process parameters in the email body

While setting up the [*Send Email*] element, you can use process parameters to personalize custom emails. This lets you include specific information in the email body, such as the first name or the phone number of a contact created as part of the process workflow (Fig. 10).

Fig. 10 First name and phone number parameters used in the email body

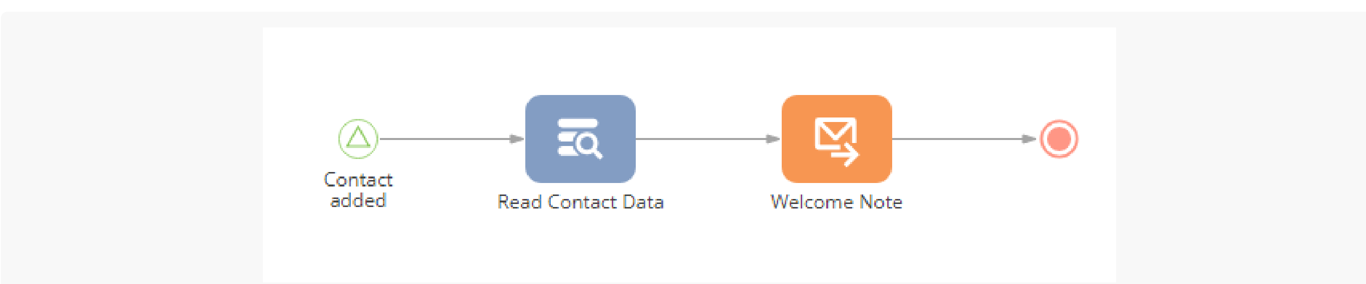


Parameters are displayed in the email body as macros, i. e., codes that gets replaced with information specific to each recipient. For example, the [*#Read Data.First item of resulting collection.Full name#*] macro (Fig. 10) represents the [*Full name*] parameter of the [*Read contact data*] element (Fig. 11). In the actual email this macro will be replaced with the first name of the contact created as part of the process workflow. Learn more about macros: Personalize email content with macros.

Note. In the [*Send Email*] element, process parameters can only be used if “Custom message” is selected in the [*What is the message?*] field, i. e., you cannot use them in email templates created outside of the [*Send Email*] element.

Any process parameter of the text, date/time, integer, and boolean types can be used to form macros in a custom message. This lets you use virtually any process parameter in the email body. For example, you can create a welcome email (Fig. 11) for all new contacts added to Creatio, and get their full name and business phone as macros in the email body.

Fig. 11 Business process diagram



To add process parameters to a custom message:

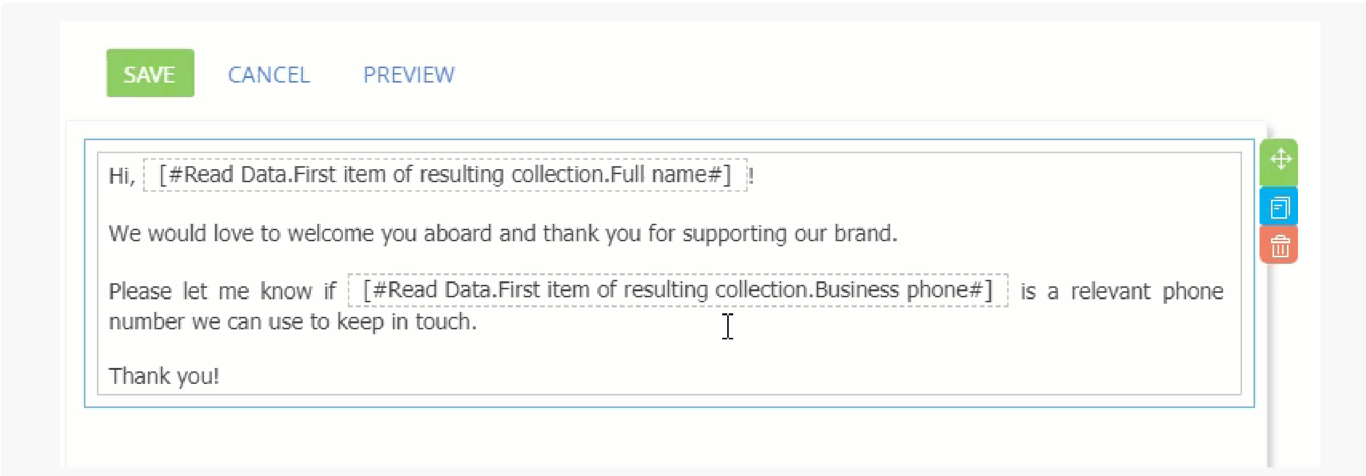
6. Add the elements whose parameters you are going to need to the process diagram. To get the field values of existing records, use the [*Read Data*] element.

   To get the name and the business phone of the created contact, use the [*Signal*] start event together with the [*Read Data*] element.

7. Add the [*Send email*] element and fill out its [*From*] and [*To*] parameters.

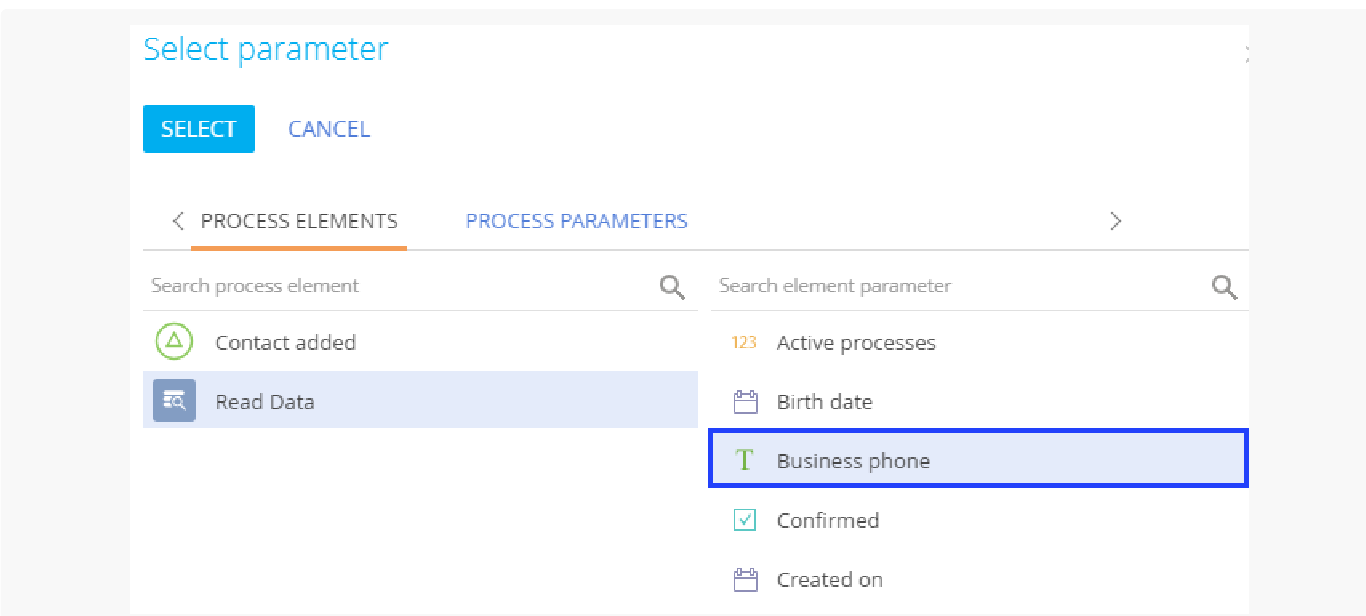
8. Select “Custom message” in the [*What is the message?*] field of the [*Send Email*] element.
9. Hold the pointer over the area under the [*Subject*] field and click to open the [Content Designer](#).
10. Add the necessary blocks to the custom message. For example, add a “Text” block.
11. Click anywhere in the working area of the Content Designer, and click the button on the toolbar. (Fig. 12):

Fig. 12 Opening the parameter selection window in the Content Designer



12. Select the necessary parameter in the selection window. In this case, add the “First name” and the “Business phone” (Fig. 13) parameters of the [*Read Data*] element to add their values to the email template body. The parameter will be placed at insertion point.

Fig. 13 Select a parameter to use as an email text macro



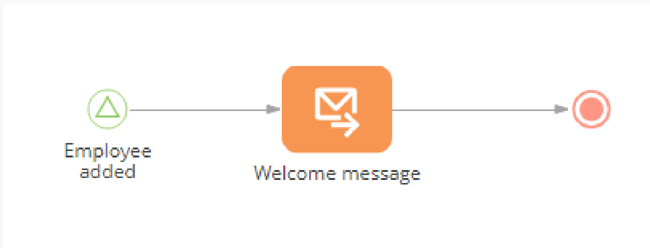
13. Save the changes in the Content Designer.
14. Fill out other fields in the [*Send Email*] element and save the process.

As a result, the process will send emails whose text will contain values of the corresponding parameters. In this case, contact first name and the business phone will be dynamically received from all created contacts in Creatio.

Use email templates in business processes

Creatio lets you send emails based on the templates from the [*Email templates*] lookup as part of a business process flow. In Creatio, email templates are created using the Content Designer. When designing a business process, you can select templates in the [*Send Email*] element. For example, you can send a "Welcome on board" email template to all new employees at your company (Fig. 14).

Fig. 14 "Welcome on board" process

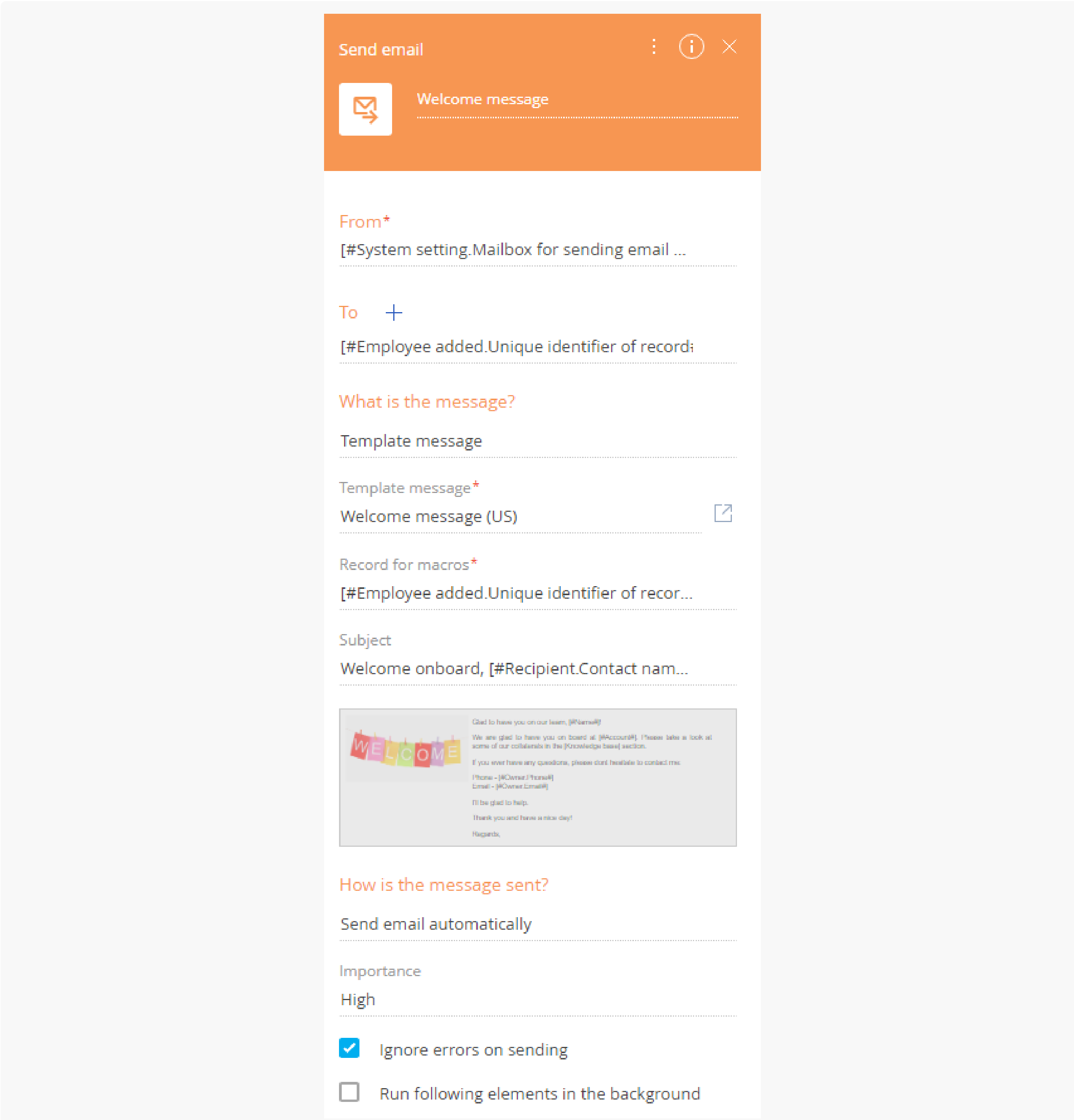


Note. Objects and their connected objects are used to populate macros in email templates. If you are looking to use available process parameters in the email body, use a custom message option in the [*What is the message?*] field. Learn more: [*Send email*] process element.

To send a template-based email as part of a business process:

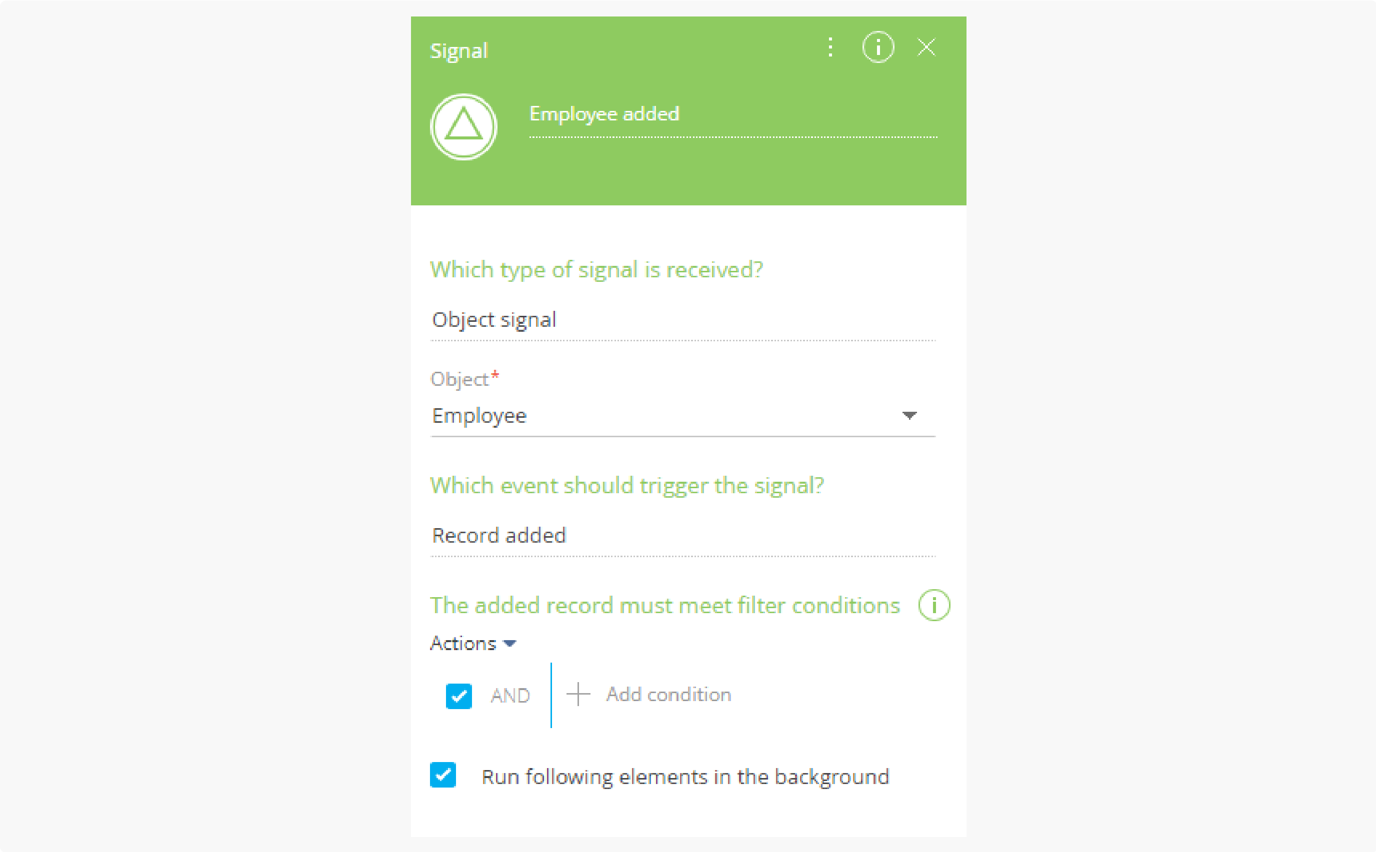
1. Add the [*Send Email*] element to the process diagram and fill out its fields (Fig. 15).

Fig. 15 Set up the [*Send Email*] element properties



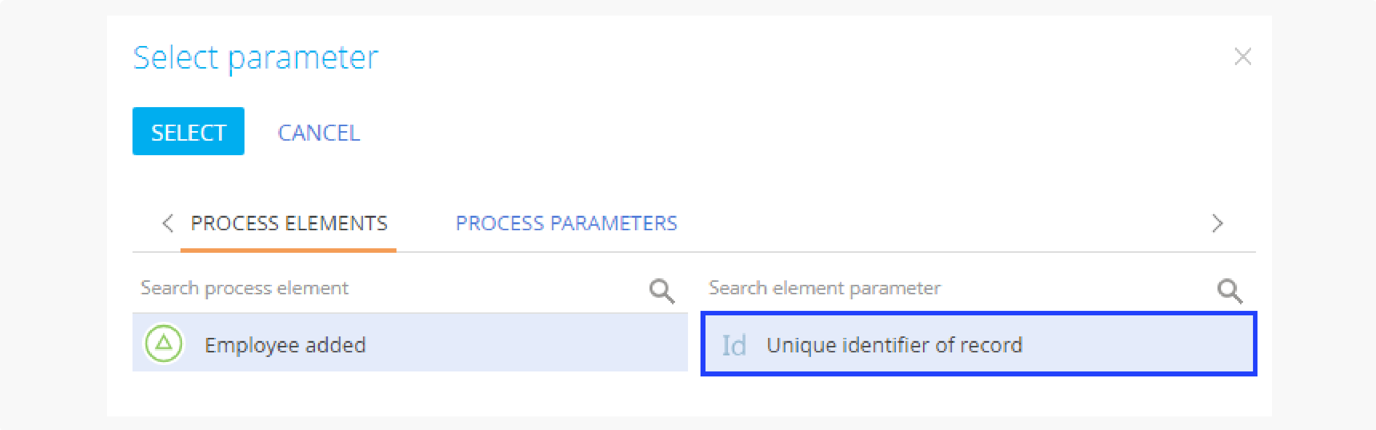
2. Fill out the [*To*] field. In this case, you can map the [*To*] field to a parameter that stores the ID of the added employee record, which you can retrieve from the [*Signal*] start event (Fig. 16).

Fig. 16 Properties of the [*Signal*] start event



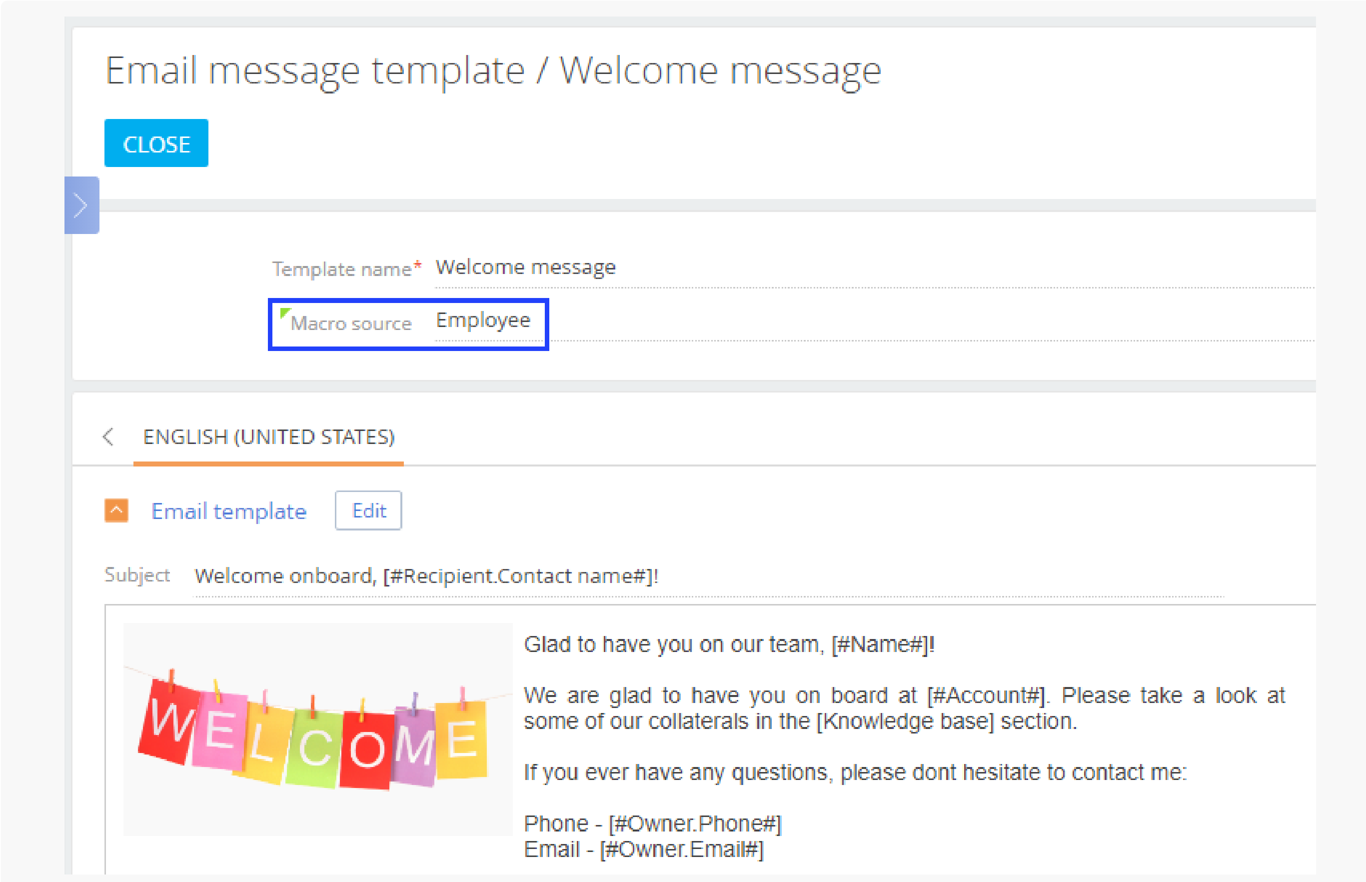
To do this, hold the pointer over the [*To*] field and click ⚡ , then select [*Contact*] → [*Process parameter*]. In the menu that appears, select [*Process parameter*]. In the window that appears, select the "Unique identifier of record" parameter of the [*Signal*] start event (Fig. 17).

Fig. 17 Select the ID of the employee record



3. Select "Template message" in the [*What is the message?*] field.
4. Select a pre-configured template in [*Template message*] field. In this case, select a "Welcome on board" template.
5. Specify the record whose field values will be used as macros in the selected template in the [*Record for macros*] field. The type of record depends on the object specified in the [*Macro source*] field on the email template edit page (Fig. 18).

Fig. 18 [*Macro source*] field on the email template edit page



In this case, since the template uses the “Employee” object, specify the ID of the employee record similarly to the [*To*] field.

6. Save the process diagram.

   As a result, an email template will be sent as part of a business process. In this case, a “Welcome on board” email will be sent to all new employees after they are added in Creatio.

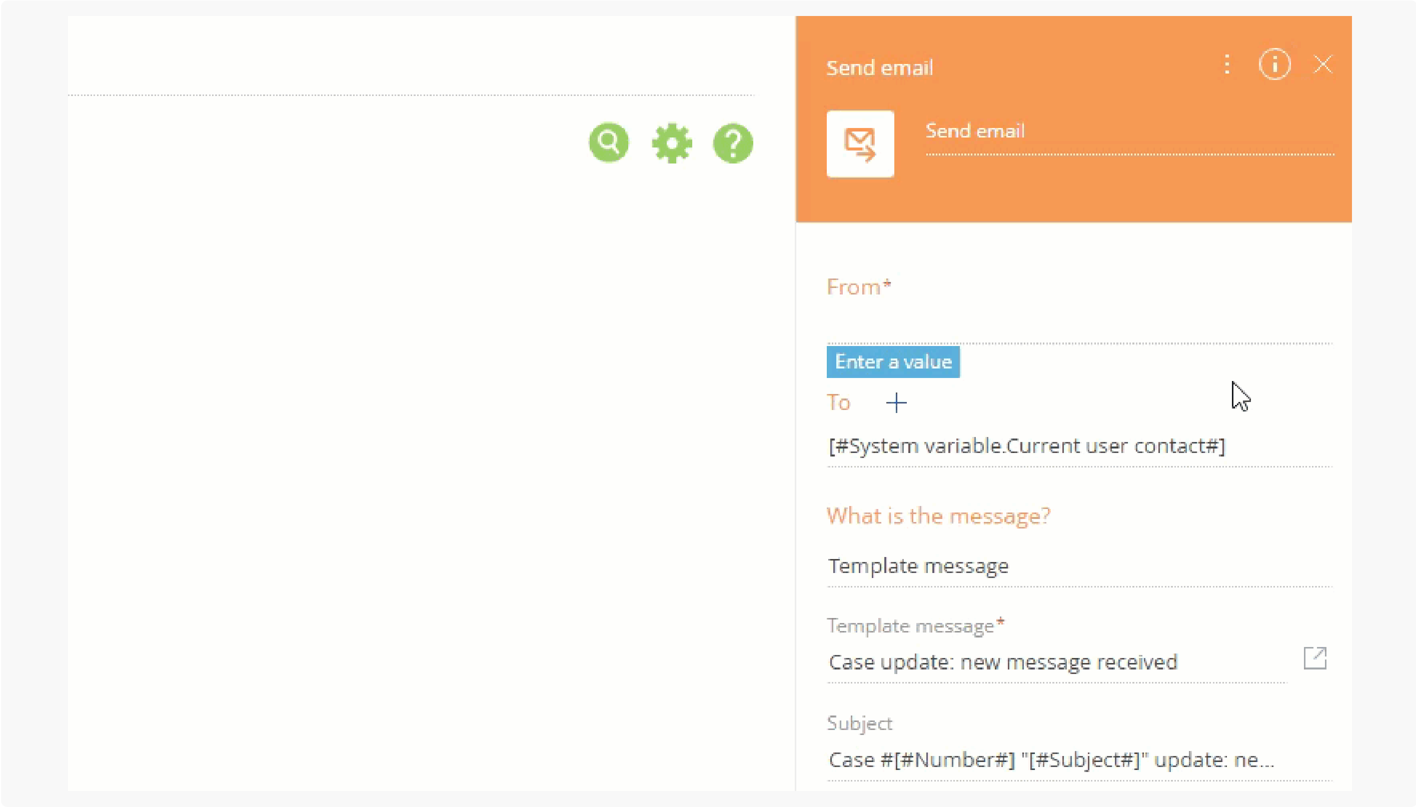
Specify recipients or senders in the [*Send email*] element

In the [*Send Email*] element, the values of the [*From*] and [*To*] fields are specified similarly to any other element or process parameter. You can select any available value or process parameter by clicking ⚡ in these fields. However, there are certain specifics when it comes to selecting senders and recipients or using process parameters as values of these fields.

Select the email sender

The value of the [*From*] field is a mailbox. You can select any of the mailboxes synchronized with your Creatio application, i. e., any mailbox registered in Creatio with login and password data. For example, you can set up a separate mailbox that sends notifications as part of a business process, then select it in the [*From*] field (Fig. 19).

Fig. 19 Selecting a mailbox



Note. Email integration is required to work with emails in Creatio. Make sure that all users who start the process have access to the mailbox specified in the [*From*] field. Learn more: Share records.

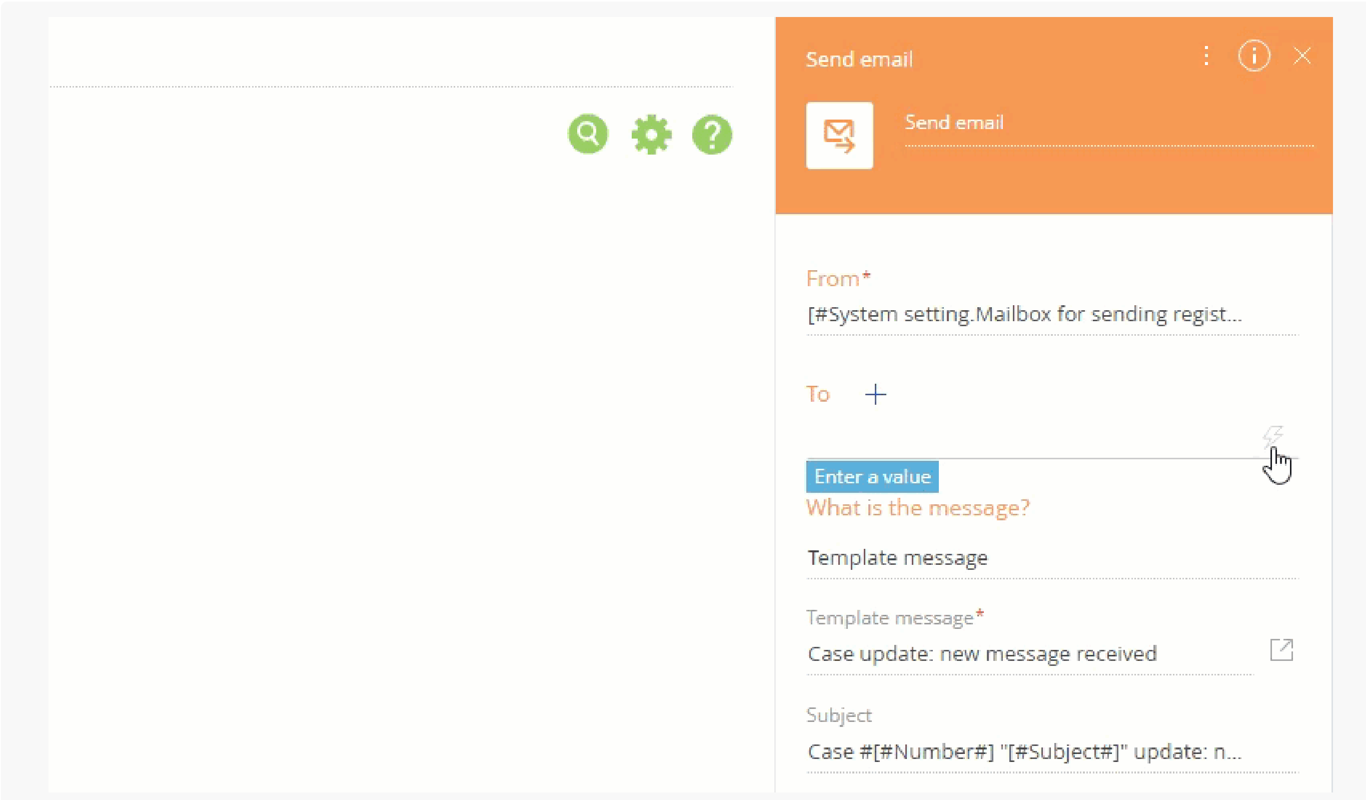
Additionally, you can map any process parameter whose value is selected from the [*Mailbox synchronization settings*] lookup to the [*From*] field. Learn more: Use process parameters.

Select email recipients

You can specify the email recipients in the [*To*] field using the following methods:

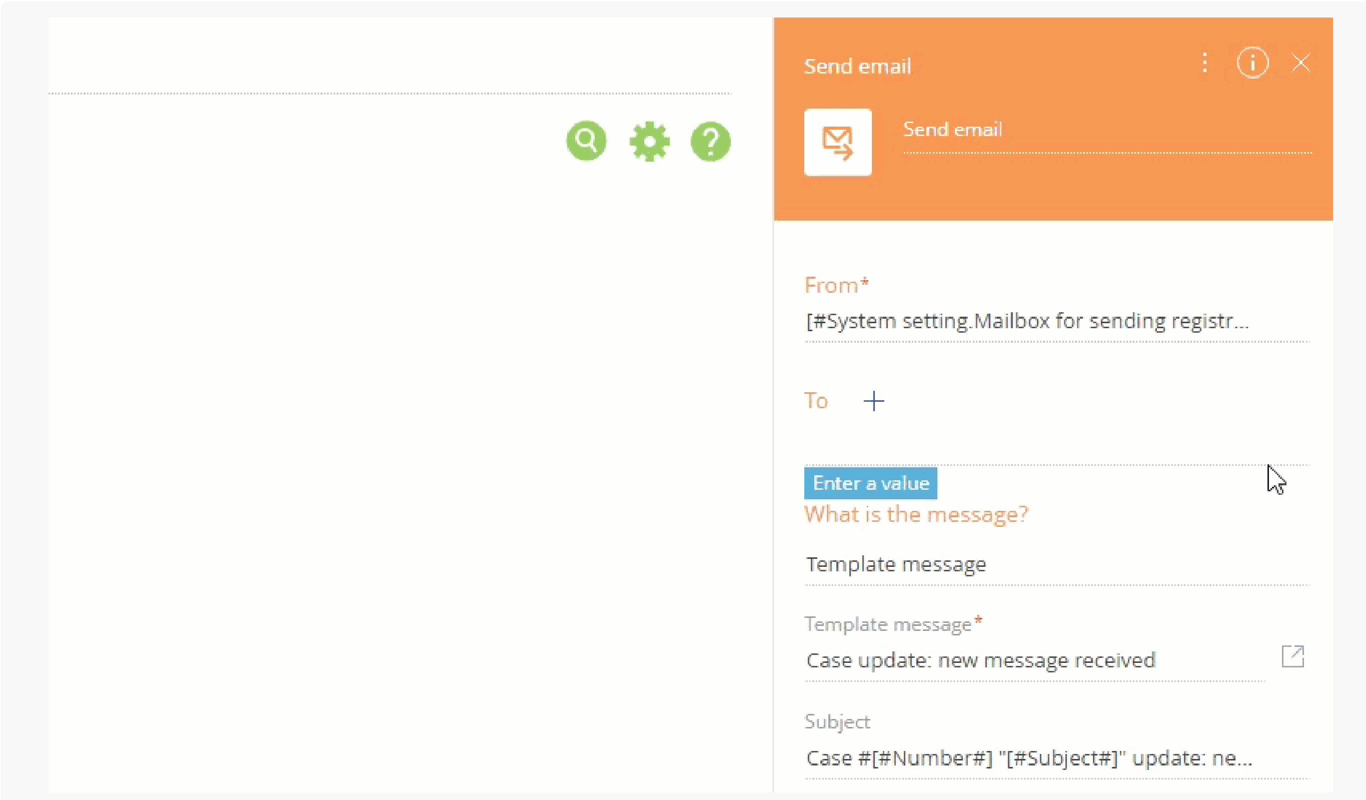
- **Enter the email manually**. For example, "johnbest@gmail.com." Note that you cannot specify several addresses in one field this way. To add another recipient, click + and enter the new address in the new field.
- **Map another parameter** of the lookup type that uses [*Account*] or [*Contact*] lookup. To do this, click ⚡ in the [*To*] field and select [*Contact*]/[*Account*] → [*Process parameter*]. For example, you can select a "Contact" parameter from a preceding [*Activity*] process element (Fig. 20). The email of this contact will be pulled from its [*Communication options*] detail.

Fig. 20 Selecting a contact from the [*Activity*] process element



- **Select a specific account or contact**. To do this, click ⚡ in the [*To*] field and select [*Contact*]/[*Account*] → “Lookup value,” then select the needed account or contact from the list.
- **Map a text parameter that contains an email address**. For example, you can select a manually created “Email” text parameter from the [[*Auto-generated page*] process element]() (Fig. 21). In this case, the parameter is filled out by a user once the auto-generated page opens, and can be used in the [*To*] field as a recipient’s email address.

Fig. 21 Selecting an email from the [*Auto-generated page*] process element



- **Select system settings whose values are email addresses (text), accounts, or contacts**. For example, "1st-line support."
- **Select an account or contact email address of the user who runs the process**. To do this, click ⚡ in the [*To*] field and select [*Contact*]/[*Account*] →"Current user account" / "Current user contact."

Depending on the selected option, the [*Send Email*] element will use the mailbox specified in the [*From*] field to send an email to the recipient(s) specified in the [*To*] field.

Auto-link emails to existing Creatio records

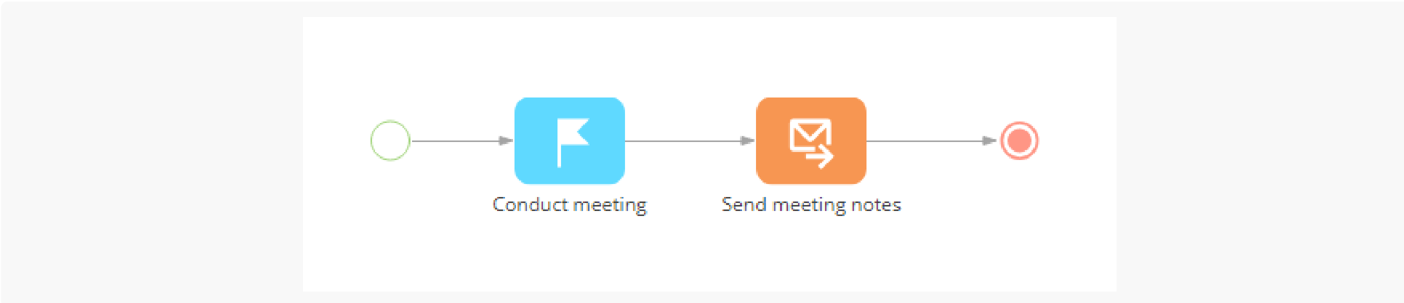
In Creatio, each email or draft created on execution of the [*Send Email*] element can be linked to other Creatio objects, meaning that an email can be linked to an account, contact, document, etc.

> **Note.** You can only link emails created manually in the [*Send Email*] element to other Creatio objects. However, the element can also create a corresponding activity upon execution. Learn more: [*Send email*] process element.

By default, the emails are linked to account or contact specified in the [*To*] field of the [*Send email*] element. If you specify a contact record whose [*Account*] field is populated, the email will be linked to the corresponding account as well.

For example, during a process of meeting with the customer (Fig. 22) a "Meeting minutes" email must be sent after the meeting. In addition to the customer contact and account, which will be linked by default, you can also link the email to the opportunity related to the meeting.

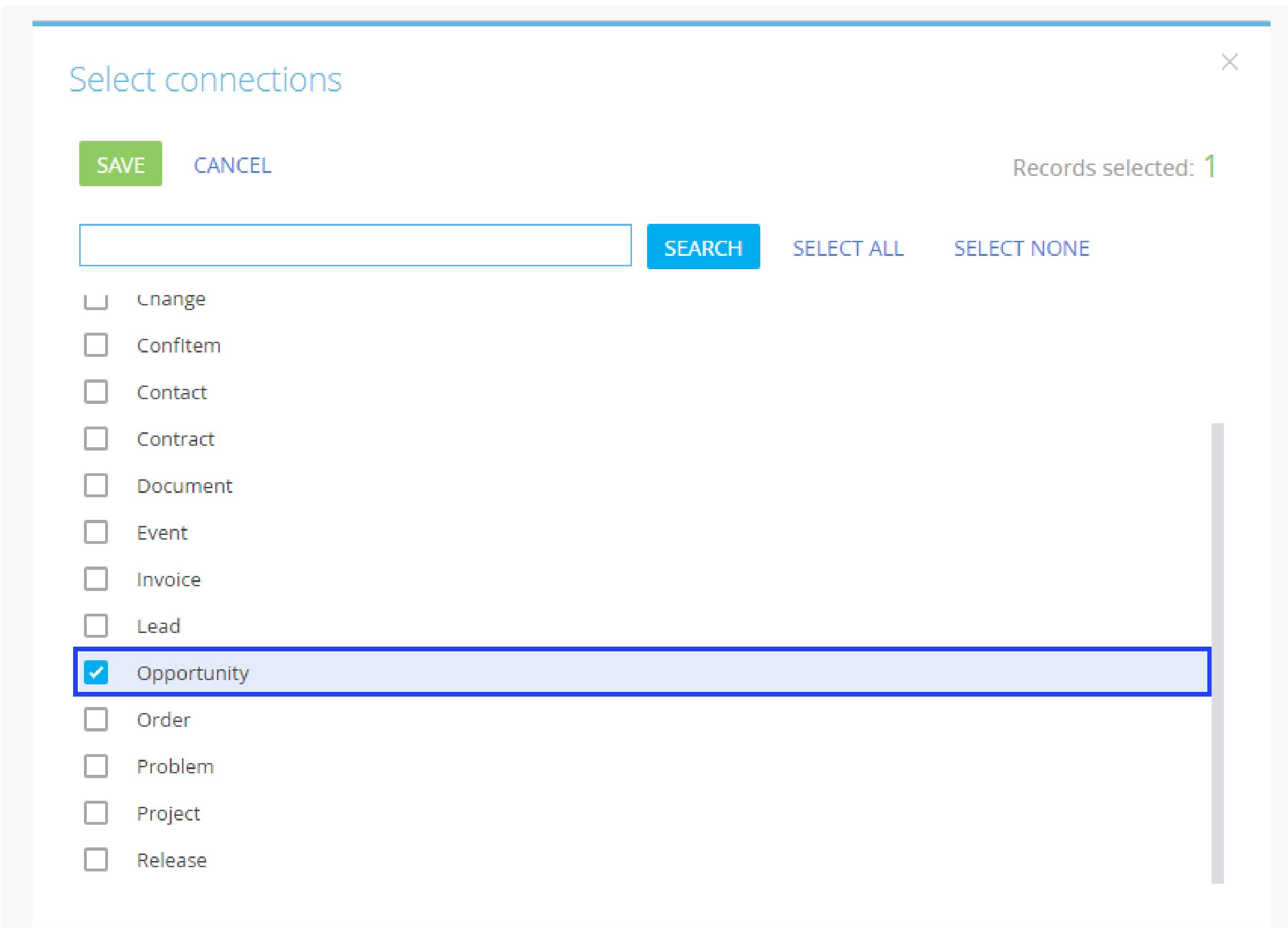
Fig. 22 "Meeting minutes" business process



To link an email to other Creatio records:

1. Select the [*Send Email*] element on the diagram.
2. Click + in the [*Email connections*] area and select one or more types of records to link to the sent email (Fig. 23). For example, to link the email to opportunity, select the [*Opportunity*] field.

Fig. 23 Select the record type



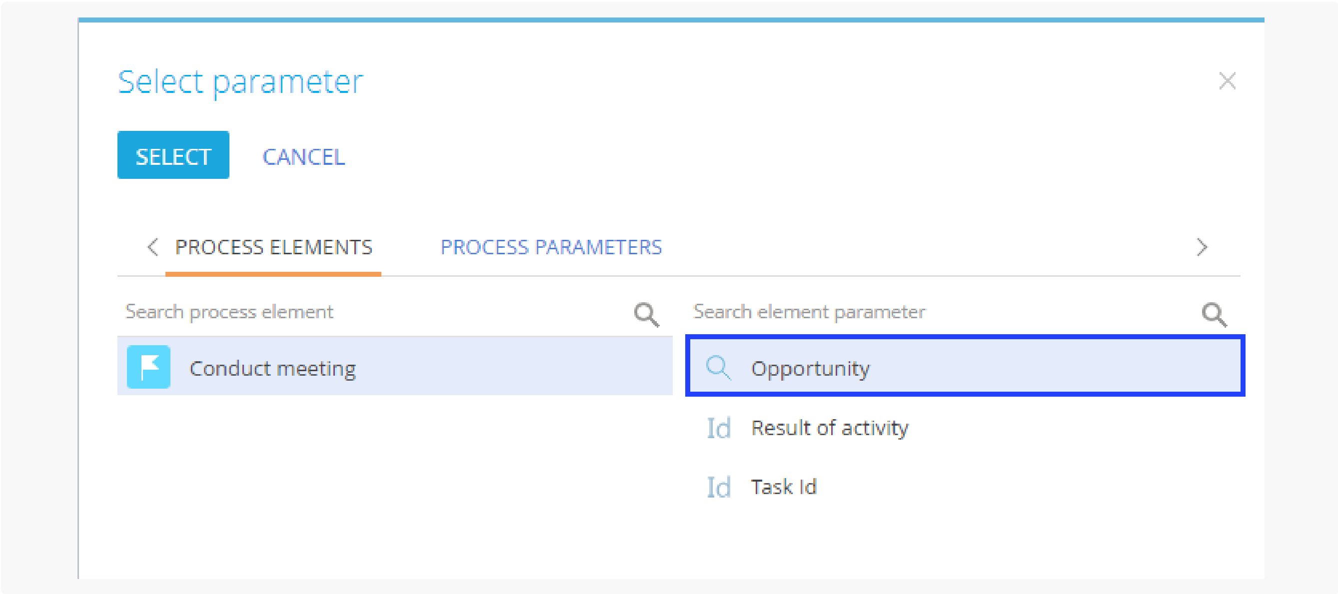
Note. The [*Account*] and [*Contact*] record fields are added by default.

3. Fill out one or more fields in the [*Email connections*] block. You can link the email to a specific record or map the field to another parameter of the corresponding type. To do this:

a. Click ⚡ in the [*Email connections*] field next to the connected record type field and select [*Process parameters*] from the list.

b. Select the needed parameter in the window that opens. For example, to connect the “Meeting minutes” email to the opportunity that was specified in the meeting activity, select that activity in the [*Process element*] column, and its [*Opportunity*] parameter (Fig. 24).

Fig. 24 Select the opportunity parameter of a process element



As a result, whenever an email is sent according to this process, the corresponding fields in the [*Connected to*] field block of the email page will be populated automatically. Additionally, email links will be displayed on the [*Email*] tab of the communication panel (Fig. 25).

Fig. 25 Email connected to an opportunity