

Email notifications

Set up email notifications

Version 8.0



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Set up email notifications

PRODUCTS: **SERVICE CREATIO**

Creatio sends automatic emails with various notifications regarding cases. Users receive emails when their cases are registered, processed, resolved, canceled, or closed.

The general setup procedure is as follows:

- Set up contact case notification rules. [Read more >>>](#)
- Set up email notification templates. [Read more >>>](#)
- Set up case resolution notifications. [Read more >>>](#)

If the case was registered by email, all recipients of the original letter will receive notifications. By default the [*From*] field will contain email of support service that received customer's email. If the case was registered from another channel (portal, call, etc.), then the [*From*] field will contain email of the support service specified in the [*Customer service Email*] system setting. To send notifications only to the case contact, even if they did not send the original email, enable the "Send automatic notifications only to contact" system setting ("AutoNotifyOnlyContact" code).

The logic for sending email notifications is set up in the "Send email to contact on case status change" business process.

Note. You also have to set up a mailbox for sending email notifications in Creatio version 7.12.2 and earlier. Read more in the Creatio 7.16 documentation.

Set up contact case notification rules

The setup procedure is as follows:


1. Open the system designer by clicking the  button.
2. Go to the [*System setup*] block → click [*Lookups*].
3. In the [*Lookups*] section, open the **Case notification rule** lookup content (Fig. 1).

Fig. 1 The [*Case notification rules*] lookup content page


Lookups What can I do for you? >

NEW CLOSE ACTIONS ▾

Case notification rule

Filters/folders ▾

Case category	Case status	Email message template	Usage rule	Sending delay, mi...	Quote original
Service request	Canceled	Case canceling notification	Send immediate	0	No
Incident	New	Case registration notification	Send immediate	0	Yes
Incident	Resolved	Case feedback request notificati...	Disabled	0	No



4. Click **New** and set the notification parameters:
 - a. Case category
 - b. Case status
 - c. Email message template
 - d. Usage rule – choose whether the notification immediately or after a delay. To configure sending delay of the selected notification rule, specify the “Send after a delay” usage rule and populate the [*Sending delay, minutes*] column.
 - e. Sending delay, minutes Select the [*Quote original email*] checkbox to include the text of the email that originated the case.
5. Save the changes by clicking the  button.

Set up the email notification templates

The email template used for each notification depends on the case status and category. For example, the [*Case closure notification*] template is used to notify the user that the case has been closed.

Use the [[Email templates](#)] lookup to manage the notification templates.

To set up an email template:

1. Open the system designer by clicking the  button.
2. Go to the [*System setup*] block → click **Lookups**.
3. Open the **Email templates** lookup.
4. Select a template and click **Edit**.
5. In the displayed [content designer](#) window, edit the text of the email.
6. If required, add macros to the template, for example, the #Number# macro to specify the incident number in the message. To do this, click the  button and select the [*Standard macros*] action. If there is no required macro in the list of pre-installed macros, use the [*Custom macro*] action and set up the required macro.

Contents of the [*Email templates*] lookup

Creatio uses the following templates for sending service notifications to the customers:

- **“Case registration notification”** – notifies the customer that the case has been registered in Creatio and is about to be processed.
- **“Case processing notification”** – notifies the customer that the helpdesk team has started processing the case.
- **“Case resolution notification”** – notifies the customer that the case has been resolved.
- **“Case closure notification”** – notifies the customer that the case has been closed.
- **“Confirmation of closing request”** – notifies the customer that the case has been closed when the customer did not reply to the question of the support operator.
- **“Case canceling notification”** – notifies the customer that the case has been canceled. This may occur if a case was created by mistake.
- **“Case feedback request notification”** – notifies the customer that the case has been resolved and awaits customer feedback and evaluation of the helpdesk performance.
- **“Case update: new message received”** – notifies the customer that the case has been updated with a new message on the customer portal.
- **“Empty case email template”** – used for specialized case notifications.
- **“Template - Portal user registration”** – sends an account activation link to the new customer portal user.
- **“Link for password recovery”** – sends a link to password recovery page to the customer portal user.

Creatio uses the following templates for sending **notifications to helpdesk agents**:

- **“Specifying case assignee”** and **“Case assigned to group”** templates are used to send internal notifications to employees about being appointed assignees on cases.
- **“Creating new email for case”** – notifies the assignee that the case has been updated with a new email message.

Set up case resolution notification

When a case is assigned the “Resolved” status, the user will receive an email asking to evaluate the quality of processing. If no evaluation is received, an additional evaluation request will be sent. You can manage the response waiting time before sending additional evaluation request using the **Number of waiting days to reevaluate resolved case** system setting.

To ensure a proper quality evaluation emailing, set up the link of Creatio website that will be used for gathering user feedback. Populate the [*Default value*] field of the **Website URL** system setting with the site URL used for Creatio access, for example <http://creatio.com>.