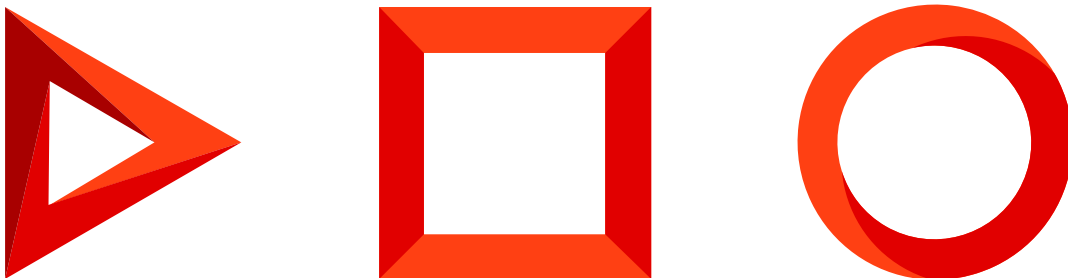


# New lead notification

Notify employees by email when a lead has been received via a landing page

Version 7.17



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# Notify employees by email when a lead has been received via a landing page

PRODUCTS: ALL CREATIO PRODUCTS

**Example.** Build the following business process: upon receiving a lead via a landing page, an email is sent to the responsible employee..

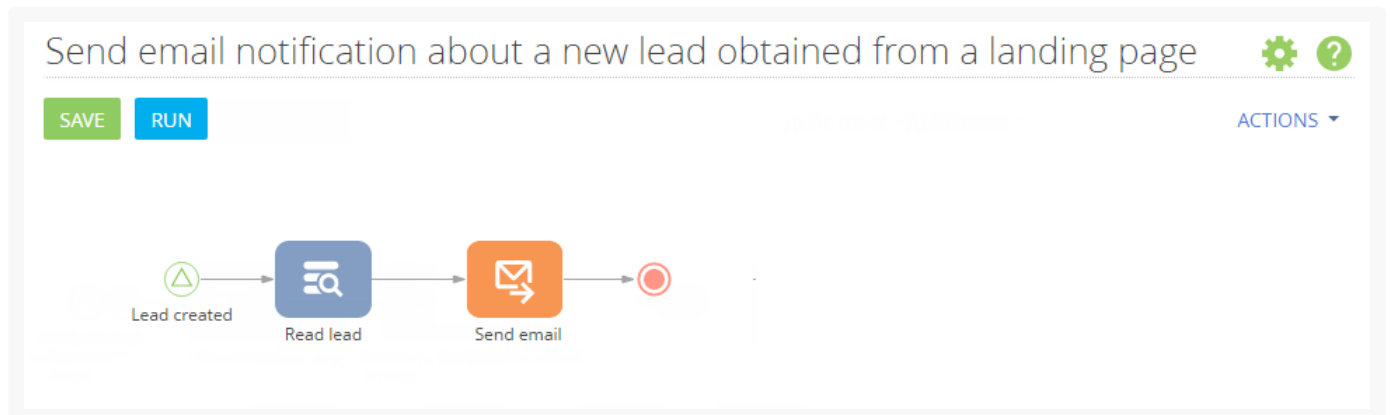
Business process diagram (Fig. 1) elements:

1. Incoming signal for creating a lead through a landing page - when you create a lead through a landing page, the signal is activated and the business process is started.
2. Reading the created lead data - obtaining lead parameters that will be later used in the business process.

**Note.** Configure a separate business process to set up automatic assigning of the lead owner.

3. Sending an email - sending an email with the specified text and the lead data obtained in the previous step of the business process.

Fig. 1 The "Sending email when creating lead via landing page" business process



To do this:

1. Place the [ *Signal* ] element on the diagram. The element is located in the [ *Initial events* ] group — "Lead created" . The element will be activated when a lead is created registered via a landing page.
2. Set up the signal parameters (Fig. 2).
  - a. In the [ *Object* ] field, set "Lead".
  - b. In the [ *What event should happen?* ] field, select "Add record".
  - c. In the [ *Added record must correspond to conditions* ] field, select "Add record".

Fig. 2 Setting up the signal properties

Which type of signal is received?

Object signal

Object\*

Lead

Which event should trigger the signal?

Record added

The added record must meet filter conditions

Actions ▾

AND

Landing page is filled in

+ Add condition

3. Add the [ *Read data* ] element of the [ *System actions* ] group and name it "Read lead". The "Read lead" element will read data from the added lead.
4. Set up the element parameters (Fig. 3).
  - a. In the [ *Which data read mode to use?* ] field, select "Read the first record in the selection".
  - b. In the [ *Which object to read data from?* ] field, select "Lead".
  - c. In the [ *How to filter records?* ] area, set the filter "Id = Lead created.Record ID". To do this, click <Add condition>, select the "Id" column, in the displayed menu select the [ *Compare with parameter* ], and then in the appeared window select [ *Unique record ID* ] of the "Lead created" element.

Fig. 3 The [ *Read lead* ] element setup area

Which data read mode to use?

Read the first record in the selection

---

Which object to read data from?

Lead

---

How to filter records?

Actions ▾

AND

Id =  
Lead created.Unique identifier  
of record

+ Add condition

---

Lead                      Ascending

---

+ Add

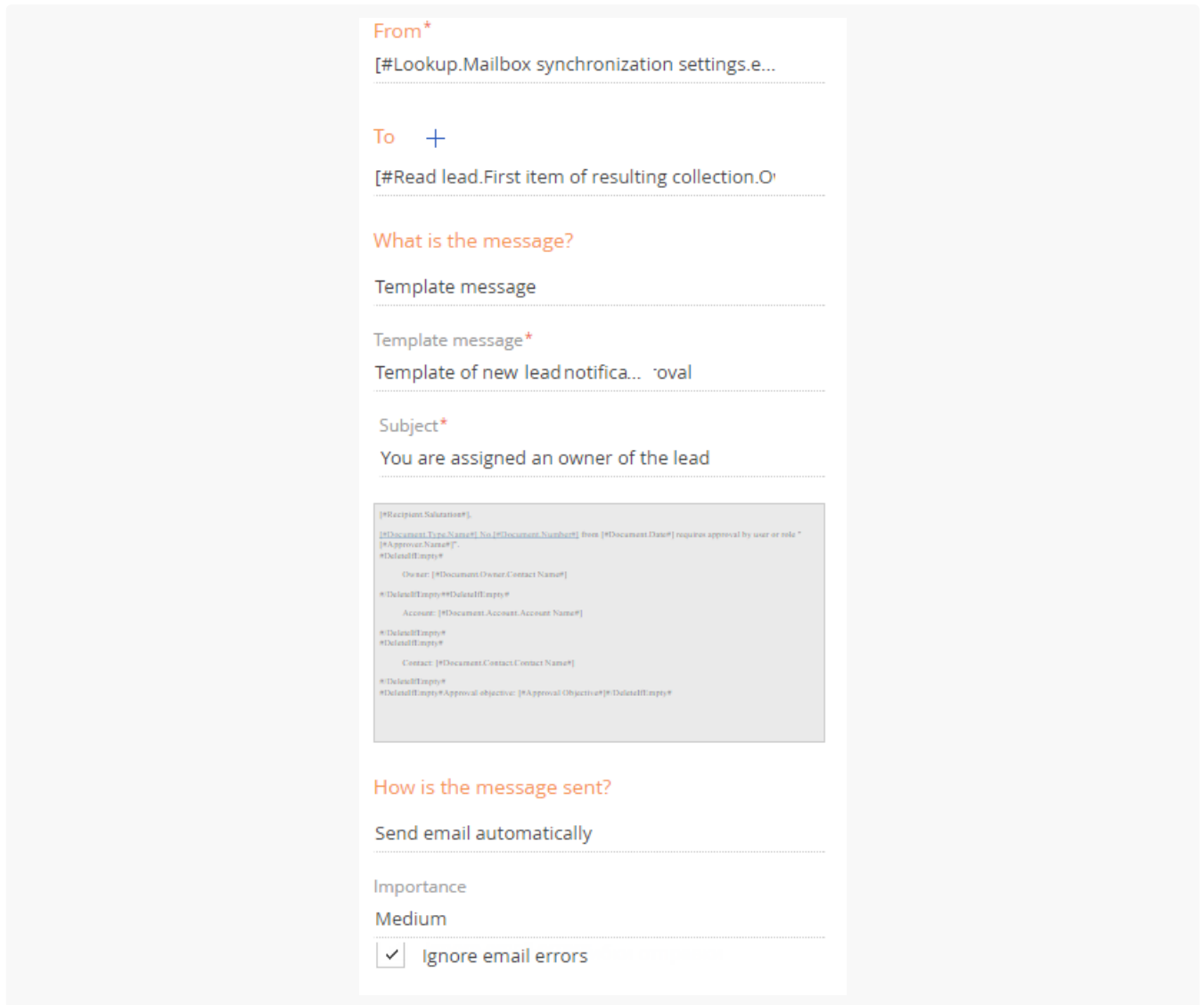
Which columns to read data from?


All columns

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5. Add the “Send e-mail” element and set the following parameters (Fig. 4):
  - a. Specify the necessary email account in the [ *From* ] field. To do this, select [ *Select from lookup* ] in the parameter value menu, then in the [ *Synchronization with mailbox settings* ] lookup, select one of the configured email accounts.
  - b. In the [ *To* ] field, specify the email of the recipient. To do this, select [ *Process Parameter* ] in the value window of the [ *Contact* ] menu item. Select the “Read lead” element in the pop up window and select “Owner” in the [ *Process parameter* ] field.
  - c. In the [ *What is the message?* ] field select “Template message”.
  - d. Select the existing template in the [ *Template message* ] field. The [ *Subject* ] field is populated automatically.
  - e. Select “Send email automatically” in the [ *How is the message sent?* ] field.

Fig. 4 [ *Send email* ] element properties area



6. After creating the process elements, connect each element with the next one by dragging the  element in the upper right corner of the selected process element.
7. Save the created business process.  
As a result of the business process, upon receiving a lead via a landing page, an email is sent to the responsible employee.