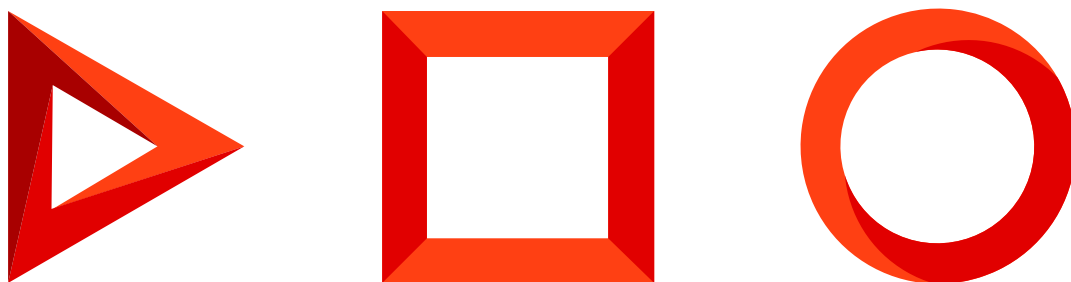


Message templates

Work with message templates

Version 8.0



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Work with message templates

PRODUCTS: [ALL CREATIO PRODUCTS](#)

In Creatio, you can design the message content from scratch or tailor an existing template to the recipient. Use templates to send emails as part of business processes, automatic notifications, and quick replies in chats. Configure all templates in the [*Message templates*] section. By default, the templates are created in the default application language. If you want to localize your templates, set up a template in the default language first. You can copy the base template settings to other languages when you add localizations later.

Set up a message template


Set up an email template

1. Go to the [*Studio*] workplace and click [*Message templates*].
2. Click [*New*] and select “Email template” in the menu.
3. Specify the template name on the opened page. For example, “Date and time of the meeting.”
4. Specify the macro source. For example, “Activity.”
5. Click [*Edit*] on the [*Email template*] detail. The Content Designer will open. By default, the templates are created in the default application language. If you want to localize your template, [add localizations](#) to the template after the initial setup.
6. Fill out the email subject in the Content Designer.
7. Drag the [*Block*] element to the working area.
8. Drag the [*Text*] element to the block.
9. Replace the [*Text*] element's placeholder content with the desired message.
10. If necessary, insert macros to personalize the message with the sender or recipient's data.
 - a. Place the cursor where you want to insert the macro.
 - b. Click  → [*Basic macro*].
 - c. In the popup, pick a macro and click [*Select*].
11. Save the template.

As a result, Creatio will create a new “Date and time of the meeting” email template. Learn more about using email templates: [Send a template-based email](#).

Note. Learn more about the Content Designer and working on complex templates: [Email templates](#).

Set up a chat template

1. Go to the [*Studio*] workplace and click [*Message templates*].
2. Click [*New*] and select “Chat template” in the menu.
3. Specify the template's name on the opened page. For example, “Greeting.”
4. Make sure that the macro source is “Chat.”
5. Enter the message in the [*Chat template*] detail. If you want to localize your template, [add localizations](#) to the template after the initial setup.
6. If necessary, insert macros to personalize the message with the sender or recipient's data.
 - a. Place the cursor where you want to insert the macro.
 - b. Click  → [*Basic macro*].
 - c. In the popup, pick a macro and click [*Select*].
7. Save the template.

As a result, Creatio will create a new chat message template. Learn more about using chat templates: [Work with chats](#).

Set up template localization

Use localized templates to send messages to your customers in their preferred language. You can use this functionality:

- in chats
- when sending template-based emails from the action panel or communication panel
- when sending notifications about business processes

Take the following steps to set up localized messages:

1. Set up the languages to use for communication with your customers. [Read more >>>](#)
2. Create localized templates. [Read more >>>](#)

Email template language verification

To determine the language of an email sent to a customer, Creatio verifies:

1. This verification stage is only relevant to the case emails. Whether the [*Always use the mailbox language*] checkbox is selected in the [*List of mailboxes for case registration*] lookup.
 - a. If the checkbox is selected, Creatio will send the email in the mailbox language to the recipient.
 - b. If the checkbox is not selected, Creatio will switch to the next verification stage.
2. Whether the [*Preferred language*] field is filled out on the contact page.
 - a. If the field is filled out, Creatio will send the email in the specified language to the recipient.
 - b. If the field is not filled out, Creatio will switch to the next verification stage.
3. Whether the mailbox language is specified.

- a. If the mailbox language is specified, Creatio will send the email in the mailbox's language to the recipient.
 - b. If the mailbox language is not specified, Creatio will switch to the next verification stage.
4. Whether the “Default language for messages” (“DefaultMessageLanguage” code) system setting is filled out.
 - a. If the system setting is filled out, Creatio will send the email in the specified language to the recipient.
 - b. If the system setting is not filled out, Creatio will send the email in the default Creatio language to the recipient.

Note. If you specify contacts with different languages or contacts without the preferred language in the [*To*] field when sending multilingual messages as part of a business process, Creatio will send the template in the default language to all recipients.

Chat template language verification

To determine the language of a chat template, Creatio verifies:

1. Whether the [*Preferred language*] field is filled out on the contact page. Creatio sets a new contact's [*Preferred language*] field to the language specified in the chat channel automatically.
 - a. If the field is filled out, Creatio will send the template in the specified language to the recipient.
 - b. If the field is not filled out, Creatio will switch to the next verification stage.
2. Whether the chat channel language is specified.
 - a. If the chat channel language is specified, Creatio will send the template in the chat channel language to the recipient.
 - b. If the chat channel language is not specified, Creatio will switch to the next verification stage.
3. Whether the “Default language for messages” (“DefaultMessageLanguage” code) system setting is filled out.
 - a. If the system setting is filled out, Creatio will send the template in the specified language to the recipient.
 - b. If the system setting is not filled out, Creatio will send the template in the default Creatio language to the recipient.

Set up preferred languages

Specify the preferred language on the contact page in the [*Contacts*] section. Creatio will send email notifications in this language to the contact. The preferred language does not depend on the UI languages configured for user operation or the default Creatio language.

The [*Customer languages*] lookup values are used to specify languages and generate multilingual templates.

- Only the languages with the [*Is used*] checkbox selected in the [*Customer languages*] lookup are available for selection on the contact page.
- By default, all languages listed in the lookup are available for use in message templates. If you add an inactive language to a template, the [*Active*] checkbox will be selected for this language in the [*Customer languages*] lookup.


The deactivated language becomes unavailable in the [*Preferred language*] field menu on the contact page but is still displayed if it was specified earlier. The chat or email template tab in such language is hidden, but messages will still be sent if this language is specified on the contact page.

If you reactivate a language, all the earlier created templates will be displayed in the lookup.

Create a localized message template

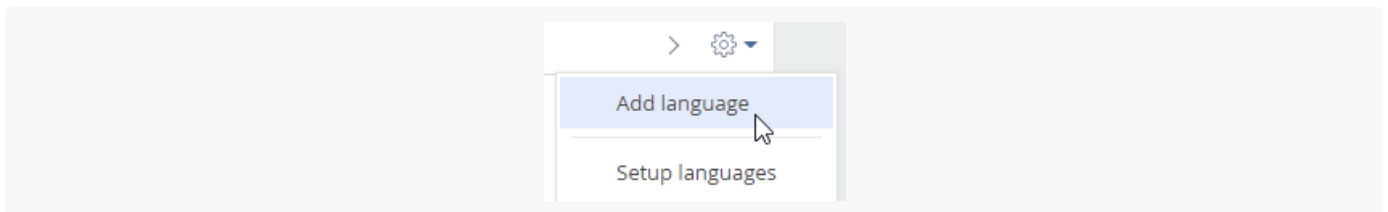
You can set up a localized chat or email message template in the [*Message templates*] lookup.

To create a localized template:

1. Go to the [*Studio*] workplace and click [*Message templates*].
2. Select the template to which you want to add localizations.
3. Click the  button. In the menu, you will see all languages with the [*Active*] checkbox selected in the [*Languages*] lookup. Select a template language you want to add.

If there are no active languages in Creatio yet or you want to add a tab with the language that has not been activated, select the [*Add language*] option (Fig. 1) and select the template language you want to add in the opened window. The [*Active*] checkbox for this language will be selected automatically.

Fig. 1 Add a language to the template



4. After you select a language, Creatio will prompt you to copy the content of an existing template to the new tab. Select this option if you need to use the configured layout for the added localization.
5. If you need to add several languages into a template, take steps 3 and 4 for each localization. As a result, several tabs for creating messages in the selected languages will be displayed on the template page (Fig. 2).


Fig. 2 A localized template


Email message template / Noteworthy events con...

[SAVE](#) [CANCEL](#) [VIEW](#) ▾

Template name*

Macro source

< [ENGLISH \(UNITED STATES\)](#) [JAPANESE \(JAPAN\)](#) [ENGLISH \(UNITED KINGDOM\)](#) > 

 [Email template](#)

Subject

6. Select the needed tab and edit the content. Create a message in each of the languages in a similar way.
7. Save the changes.

Note. If you copy a multilingual template, Creatio will copy all of its saved localizations.