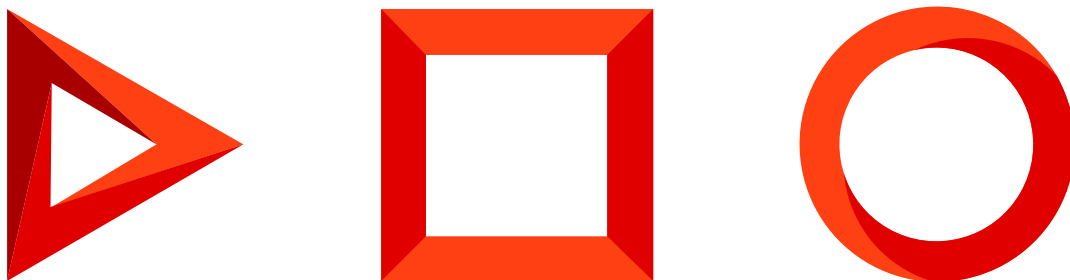


Marketing Creatio licenses

Marketing Creatio licensing

Version 7.17



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Marketing Creatio licensing

PRODUCTS: **MARKETING**

You need the following additional licenses to work with **Marketing Creatio** and **Creatio CRM bundle**:

- **Marketing campaign** licenses (“marketing creatio”). Enable access to all sections of the Marketing Creatio product. The number of licenses must correspond to the number of Creatio users.
- **Active marketing contact** licenses (“marketing creatio 1000 active contacts”). Enable creating records in the [*Email*], [*Campaigns*], and [*Events*] sections. The number of licenses must not be less than the number of active contacts who receive marketing communications (emails, campaigns, or events).

Note. License names include prefixes that specify the application deploy method: onsite or cloud. Cloud licenses do not apply to on-site applications and vice versa.

Active contacts are contacts who have had at least one of the following types of marketing communications within the last year:

- A contact was a part of an email audience and the email sent to the contact had an actual response.
- A contact was a part of an event audience.
- A contact was a part of a campaign audience.
- A contact is a part of a loyalty program and they made at least 1 purchase in the past year (if you use Creatio Marketplace products that automate loyalty programs).

Licenses are valid within the **licensing period**. The licensing period lasts for 365 days, starting from the license start date and ending on the date specified as “Due date” in the License Manager.

The contact can become active only once during a licensing period. If the contact was active during a previous licensing period, but they did not receive any marketing communications during the current period, Creatio does not consider the contact as active during the current period.

Make sure that the number of active contacts (used licenses) does not exceed the number of available licenses.

If the number of used licenses exceeds that of the available licenses, errors may occur during the following:

- saving or sending emails
- editing email templates in the Content Designer
- advancing a campaign to the [*Marketing email*] step
- certain operations in the [*Events*] and [*Campaigns*] sections might be disabled

Creatio notifies the users when the number of available active contact licenses becomes lower than the threshold percentage of the total number of paid licenses, 10% by default. Notifications are sent only to system users whose contacts are owners or creators of emails, campaigns, events over the past 30 days. We recommend such users to **check the [*Notifications*] tab** of the Communication panel regularly.

Note. You can change the threshold percentage in the “Active contacts - warning threshold (%)” (“ActiveContactsWarningThreshold” code) system setting.

If the number of active contacts exceeds the number of purchased licenses, you need to purchase additional licenses. Send a license request to Creatio technical support team.

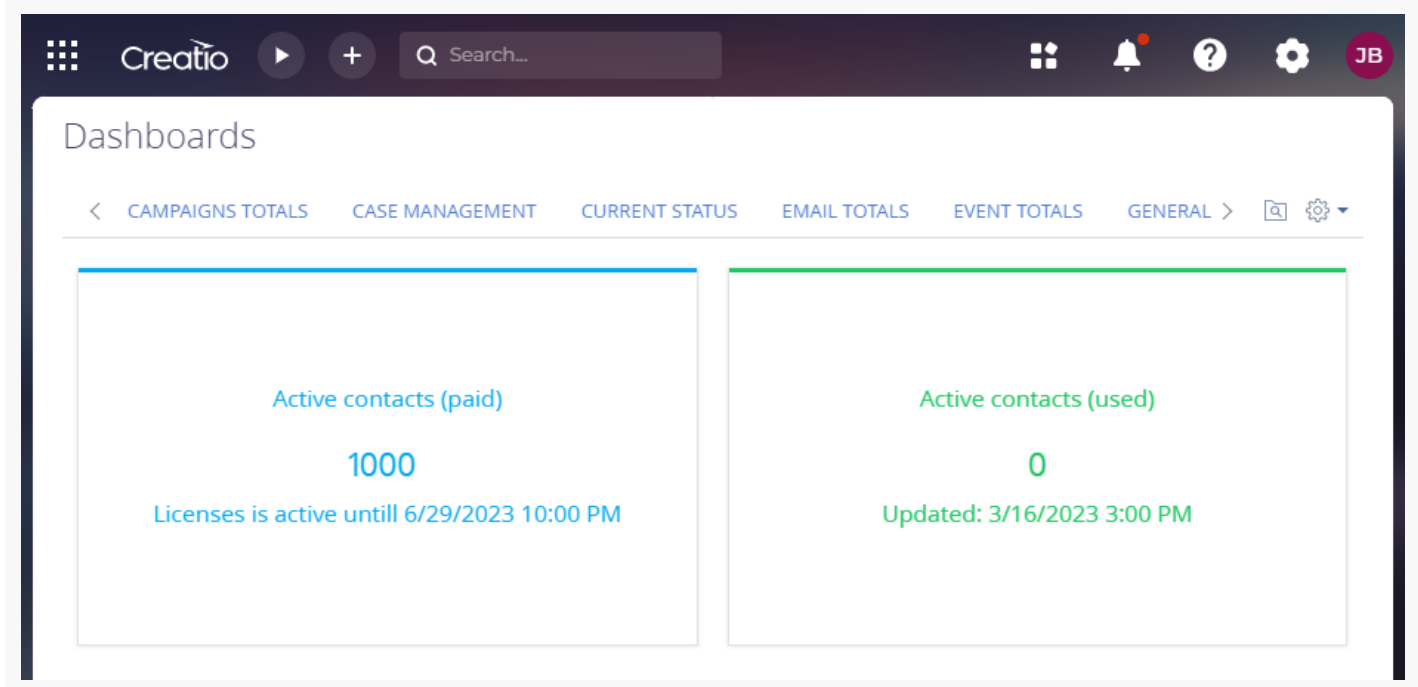
The following guidelines will help **avoid restrictions and errors caused by the lack of available licenses**:

- When adding groups of contacts to email participants make sure to check the filters of corresponding contact folders. If the filters have been modified, participants who do not belong to the target audience of the email may be included in the folder. Creatio calculates the number of active contacts and available licenses regularly (once every four hours), and additionally – each time after an email is sent. That is why the notification about insufficient licenses may be missing when you form the email audience.
- If the number of active contacts does not exceed the available licenses on sending an email, Creatio will send emails to each of the recipients from the audience. For example, you have 10000 licenses and 9999 active contacts. You add 50000 recipients in the email audience. In this case, email messages will be sent to all contacts from the audience. After sending the email, Creatio check license availability and apply licensing limitations, if necessary.
- When sending emails, be sure to check the settings that enable you to manage the sending operation and restrict sending emails to inactive contacts, namely:
 - Prohibition to use a contact’s email address (the [*Do not use Email*] checkbox on the [*Communication options*] detail of the contact).
 - Possibility to subscribe to certain email types as well as unsubscribe from them.

Check the number of used active contact licenses

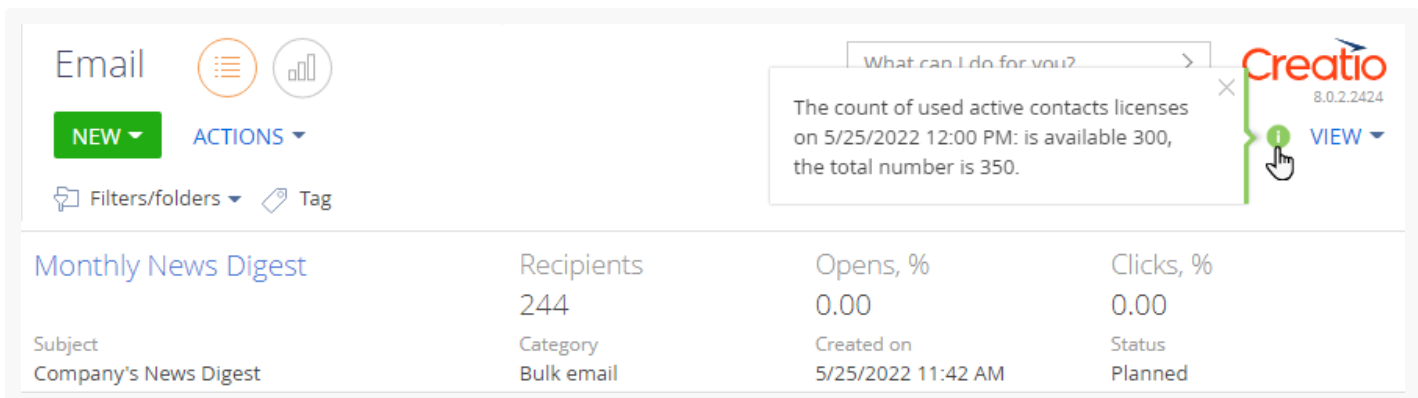
The number of owned licenses and active contacts is available in the [*Dashboards*] section, on the [*Licenses*] tab (Fig. 1). These metrics may slightly differ from the actual data since they are calculated once an hour. Since Creatio version 8.0.2 the indicators also display licenses end date.

Fig. 1 License dashboard



You can view the total number of marketing contact licenses and number of available licenses on tooltip on the list page and record page of the [*Email*], [*Campaigns*], [*Events*] sections as well. The tooltip color depends on the number of available licenses and varies from green (sufficient licenses) to red (no vacant licenses). These numbers might slightly differ from the actual data since they are calculated once an hour.

Fig. 2 License indicator



Creatio checks license availability on schedule or after sending an email. We recommend checking the number of available licenses manually when you prepare a new email communication with customers.

To view the list of active contacts, set up a filter in the [*Contacts*] section as shown in Fig. 3.

Attention. The filter does not include the loyalty program participants.

Fig. 3 A filter that displays active marketing contacts

Actions ▾

- Response in Email (by column Contact) exists
 - Response ≠ Canceled (duplicated email); Canceled (email not provided); Canceled (incorrect email); Canceled (invalid email); Canceled (sender's domain not verified); Canceled (sender's name not valid); Canceled (template not found); Canceled (unsubscribed by email type); Canceled (unsubscribed from all emails); Stopped (manually); Delivery error; Email limit reached; Stopped (time to send expired)
 - AND
 - Created on ≥ 6/30/2022
- OR
 - Campaign participant (by column Contact) exists
 - Created on ≥ 6/30/2022
 - AND
 - Event participant (by column Contact) exists
 - Created on ≥ 6/30/2022

+ Add condition

The “Created on” date in the filter is the date when the licenses were uploaded to Creatio. To calculate the needed date:


Fig. 4 View the license validity term

License manager Creatio

ACTIONS ▾

Q marketing X

Name ^	Type	Start date	Due date	Status	Total
marketing creatio 1000 active contacts	Server	6/30/2022	6/30/2023	Active	1,000

1. Click  to open the System Designer.
2. Go to the “Users and administration” block → “**License manager.**” This opens a page.
3. Use the search field to find the needed license by name quickly and view its end date on the page that opens (Fig. 2).
4. Copy the start date of the license.

Note. The license expires in 365 days after it was uploaded. If the due date is bigger than start date + 365 days, contact Creatio support or your manager.

As a result, you will get the start date of the license validity period. Enter the date in the [*Created on*] column when setting up the filter that selects active contacts.