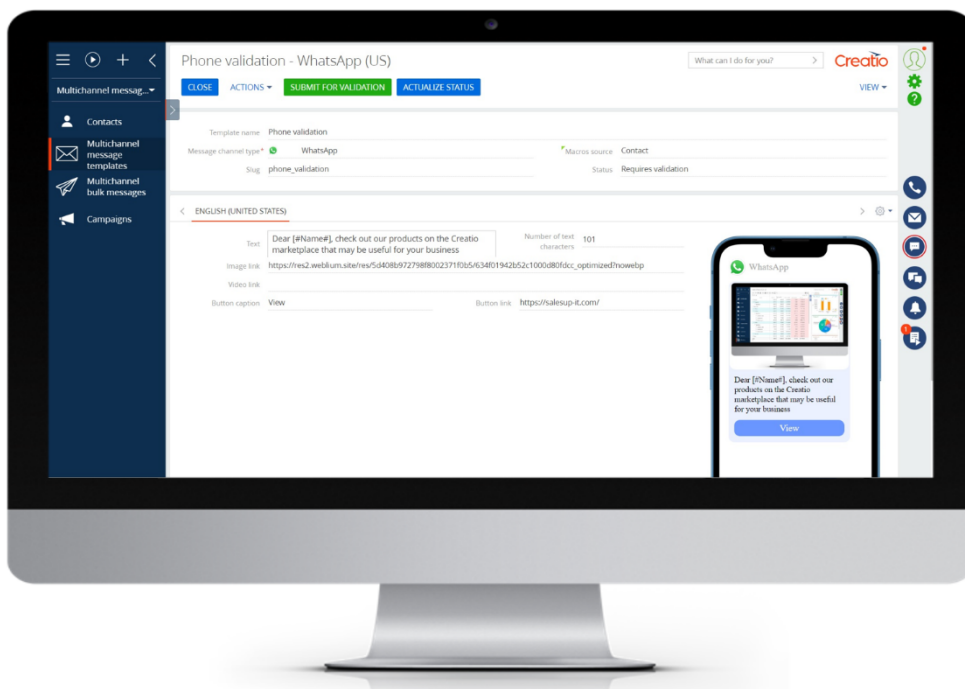# SALES'UP MULTICHANNEL BULK MESSAGING FOR CREATIO

Guide to setup and utilization

04.04.2023

Contents:

Product description

Multichannel Bulk messaging for Creatio product is used for one-time sending of numerous messages through various communication channels – SMS, mobile apps, social media and messengers to keep in touch with active clients.

Use cases

This product helps to configure and run the bulk messaging alongside with triggered messages in order to inform contacts on offers, discounts, end of sale, birthday greetings, etc.

Key features

- Convenient setup wizard of bulk messaging to send numerous massages through various communication channels - SMS, mobile apps, social media and messengers;
- Advanced analytics on bulk messaging;
- Opportunity to view data during the sending process – number of sent and arrived messages, status and result of each message;
- Manual start of the bulk messaging at any time;
- Preview of the customized message template in order to see how a message will look like;
- Sending of a message to certain contacts and the ones, which are included into dynamic groups;
- Convenient setup for an automatic sending of triggered messages.

Restrictions

In order to send messages via such communication channels as SMS, Push, WhatsApp, it is necessary to have an account in Infobip https://www.infobip.com/ (or in another messaging provider). Information on provider-side settings is available on the provider's website.
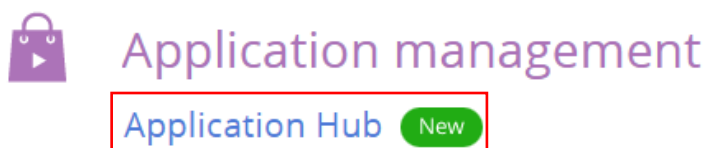Sending of a message through these channels requires additional charges from the provider.

Product installation

To install packages, click this icon and go to the «Application hub».
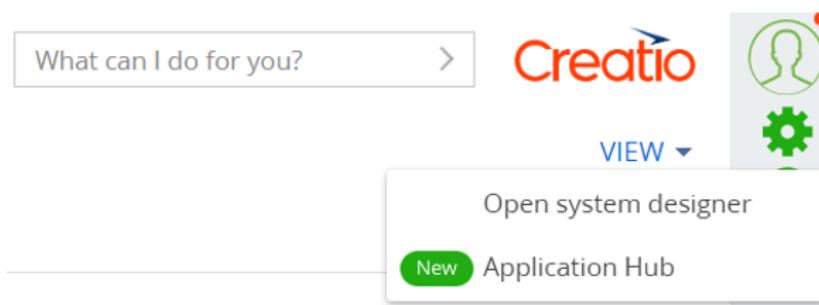
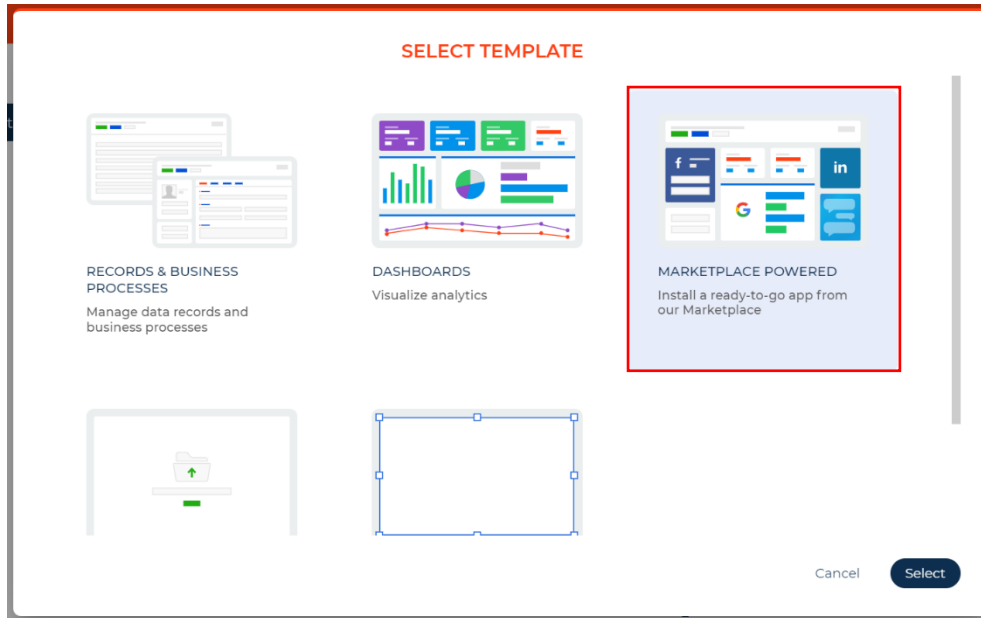Or go to the «System designer» and select «Application hub».

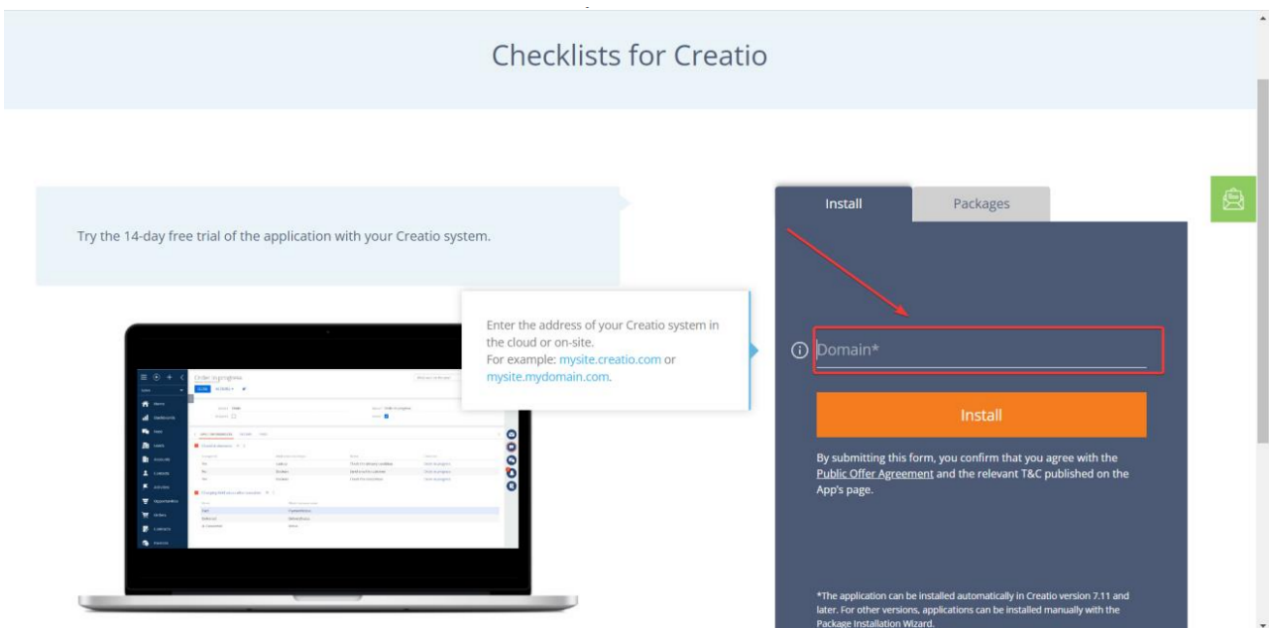On the «Application hub» page press the «New app» button,

Choose «Marketplace powered» and push the «Select» button.

Push the «Install» button on the product's page.

Specify the address of a Creatio website to which the product needs to be installed.

Upon completion of installation, a page for logging in to the Creatio website will be opened.

In case the product's package installation is from the file, it is necessary to request an up to date package from the Sales'Up support team. Then on the «Application hub» page, click the «New app» and select «Install from file», specify a path to the archive with a package and perform installation.
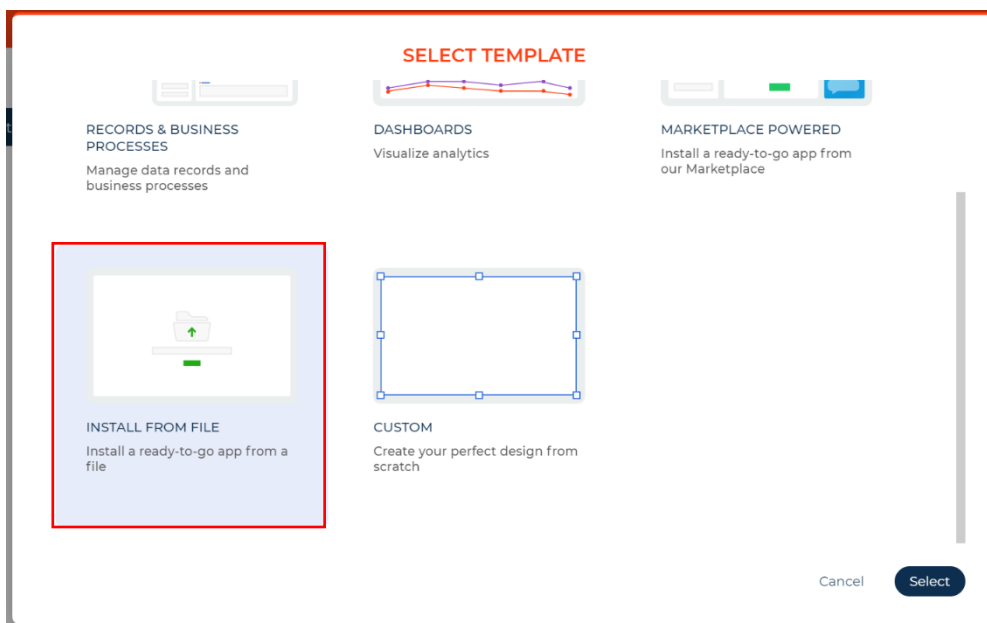
Setting up message channels

To send notifications via the following channels:

- SMS;
- Push;
- Telegram;
- Instagram;
- Facebook;
- WhatsApp.

You must first add and configure the appropriate notification channels.

Instructions for setting up each notification channel can be [found here](#).

Adding a multichannel message template

Before setting up a bulk messaging, it is necessary to customize a template for each communication channel:
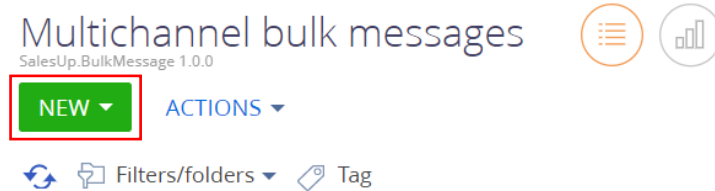
- Push;
- Email;
- SMS;
- Facebook;
- Instagram;

- WhatsApp;
- Telegram.

Setting up a template profile

To add a template for a multichannel message:

1. Go to the «Multichannel message templates» and press «Add» button in the section registry;

2. Fill in all required and additional fields on the page of template's customization:

- Template name – specify the unique name of a template for the convenient identification and search in the section registry;

- Message channel type – choose one of the communication channels, based on which a template will be sent;
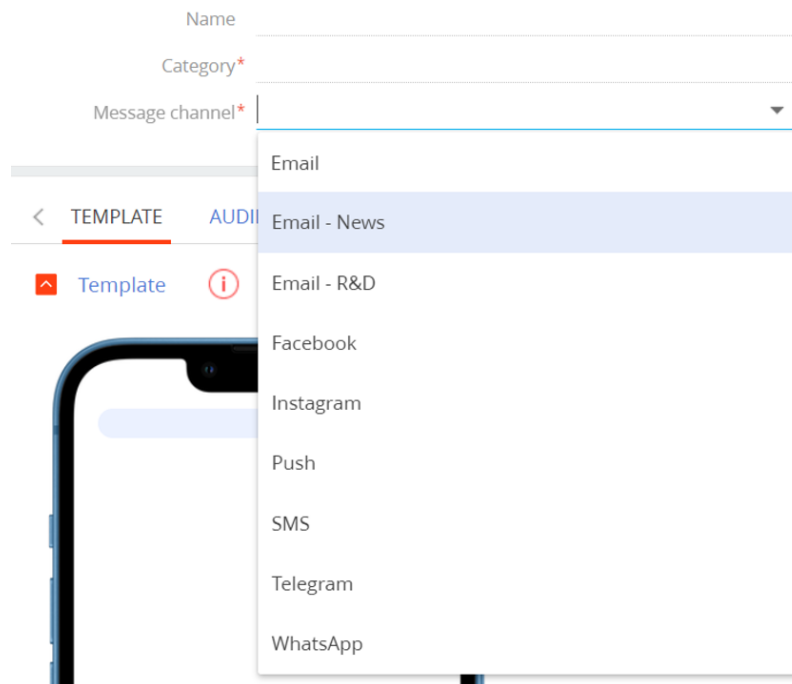
- Slug (unique identifier-like string) – after saving a record, a slug is generated automatically based on the template's name created by a user;

- Macros source – choose the system object, fields of which can be used in a template as macros. For instance, if there is a need to use a recipient contact's name in a message, select «Contact» as a macros source.

Setting up text for a template

To personalize a message text in a template, there are basic and custom macros available for a user.

For the convenience of creation and editing of a future message template, the display as it will look like on a smartphone's screen is added on the template settings page. Following template's parameters will be displayed and dynamically changed there:

- Text – specify the message text, which will be displayed for a message recipient;

- Image link – a user can add a link to an image, which will be displayed in a message template, if needed;

- Button caption – specify the name for a template button;

- Button link – specify the website address, to which the message recipient will be forwarded after pressing the button in a template.
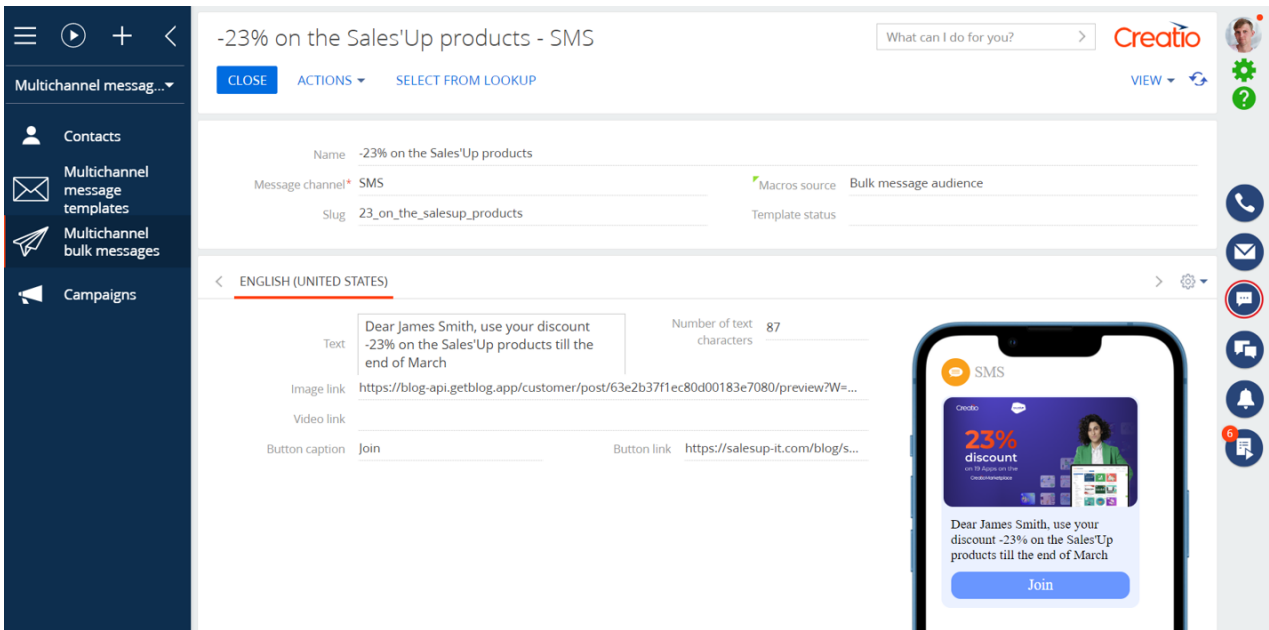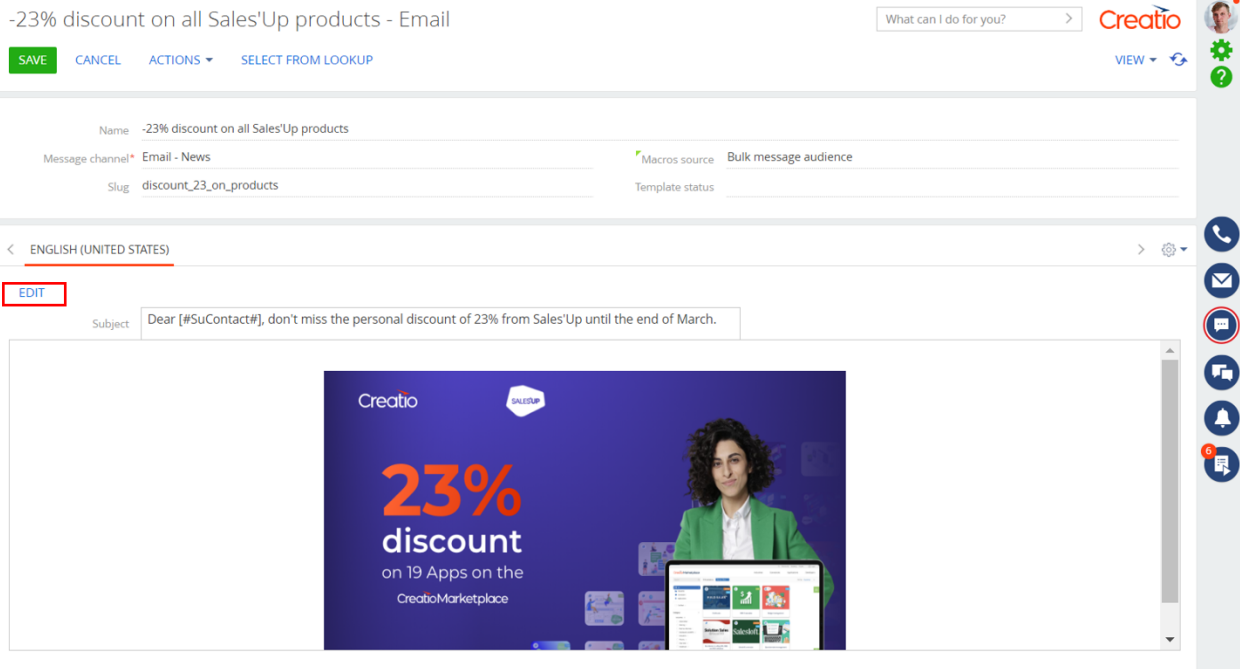
When adding a template to the bulk message through the email channel, there are basic functionalities available for a user to customize email templates of Creatio messages.
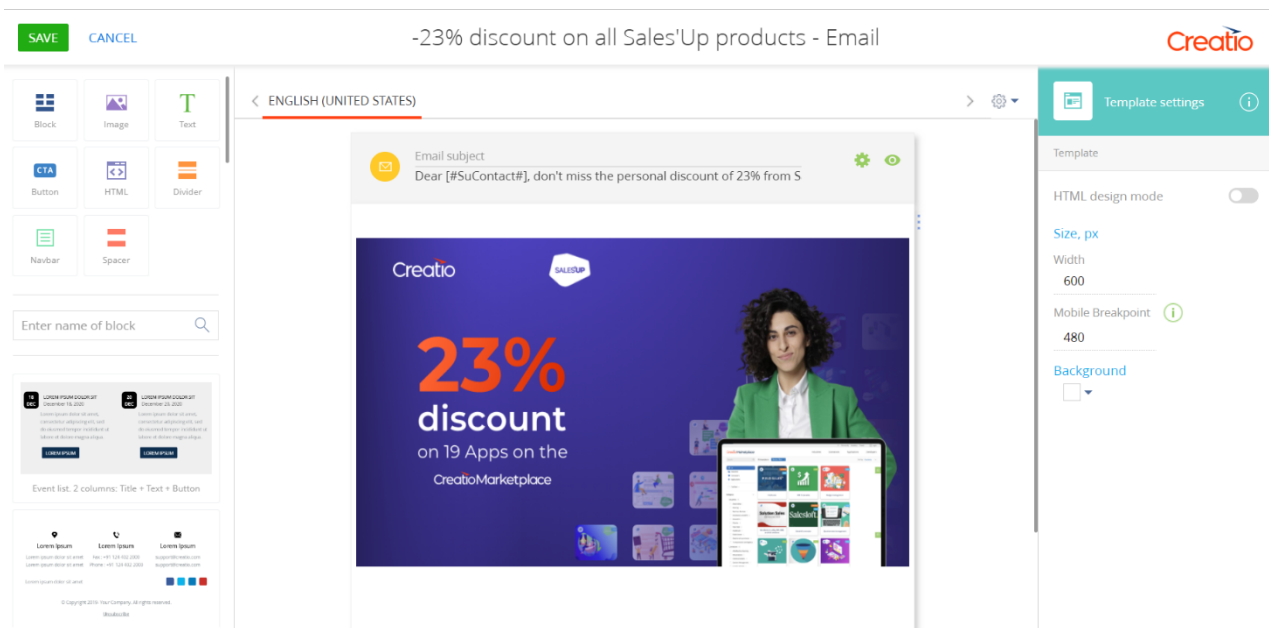
After saving a customized template, the preview of an eventual template will be available for a user. It can also be edited later if necessary by pressing the «Edit template» button.
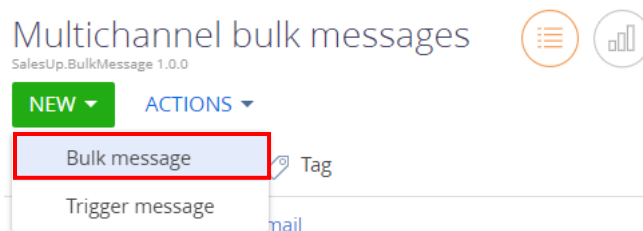
Important! To send messages to mobile apps or messengers, integration with them in the Creatio system must be configured.

Setting up bulk messaging

To set up the bulk messaging, go to the «Multichannel bulk messages» section, press the «New» button, and select the «Bulk message» option.


On the settings page fill in following fields:

- Name – specify the unique name of a bulk message setting in order to identify it and search for it in the registry more conveniently;

- Category – there are next categories possible: Information materials, Invitation, Newsletter, Focus email;

- Message channel – select a communication channel of a bulk message.
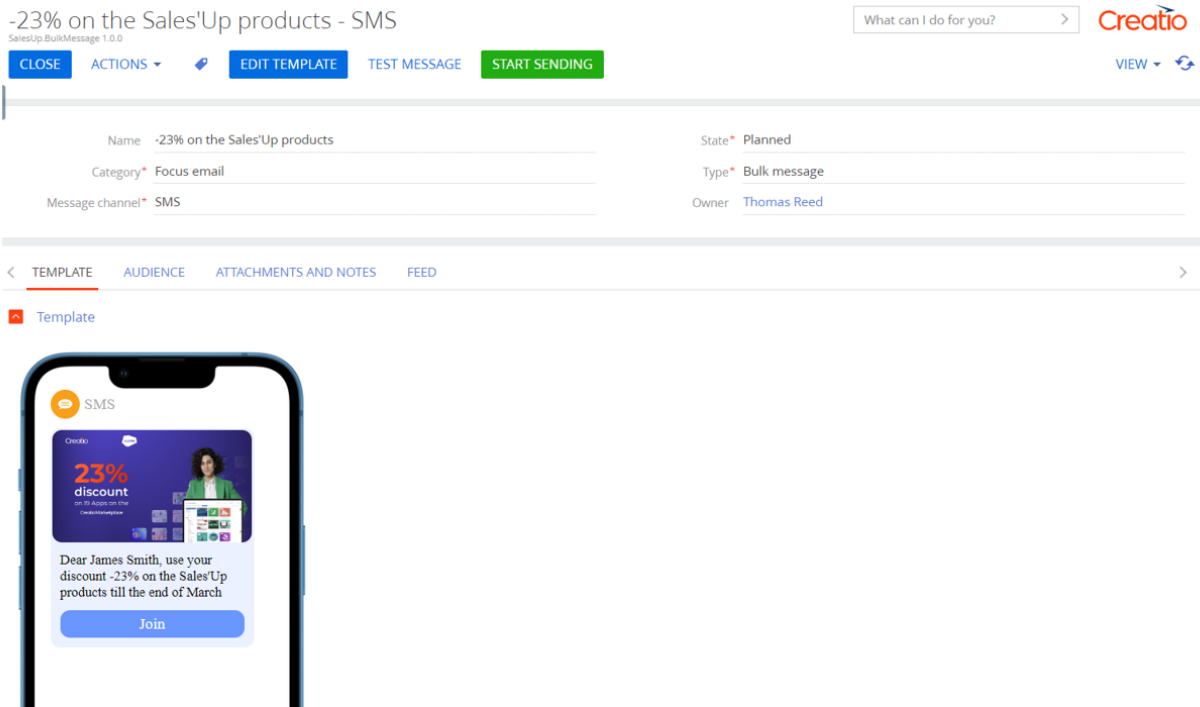
After filling in the main information, it is necessary to save settings by clicking the «Save».

Adding of a template to the message settings

User can create a new message template, or choose an existing one (previously customized) by pressing the «Edit template» button.
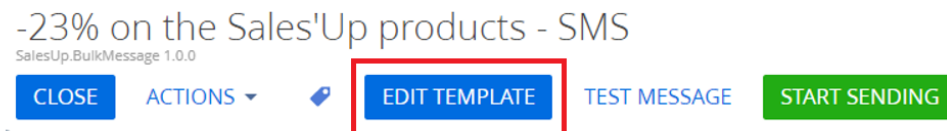
On the page of template settings, a user creates and saves a new template, or clicks the «Select from lookup» and chooses a previously customized one.

-23% on the Sales'Up products - SMS

CLOSE   ACTIONS ▾   **SELECT FROM LOOKUP**

What can I do for you? ›   Creatio

VIEW ▾

Name	-23% on the Sales'Up products
Message channel*	SMS
Slug	23_on_the_salesup_products

Macros source	Bulk message audience
Template status	

< ENGLISH (UNITED STATES) >   ⚙▾

Text	Dear James Smith, use your discount -23% on the Sales'Up products till the end of March
Image link	https://blog-api.getblog.app/customer/post/63e2b37f1ec80d00183e7080/preview?W=1170
Video link	
Button caption	Join

Number of text characters   87

Button link   https://salesup-it.com/blog/special-offer-fr...

SMS

23% discount
on 15 Apps on the
CreatioMarketplace

Dear James Smith, use your discount -23% on the Sales'Up products till the end of March

Join
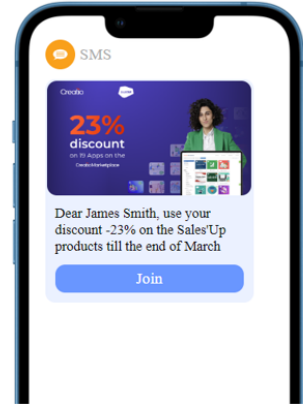
Select: Message template   ✕

SELECT   CANCEL   NEW   ACTIONS ▾   VIEW

Name ▼		SEARCH

Название ⌃

-23% discount - SMS (US)

Phone validation - SMS (US)

Its preview will be displayed on the «Template» detail in a tab of the same name upon selection of an existing template.
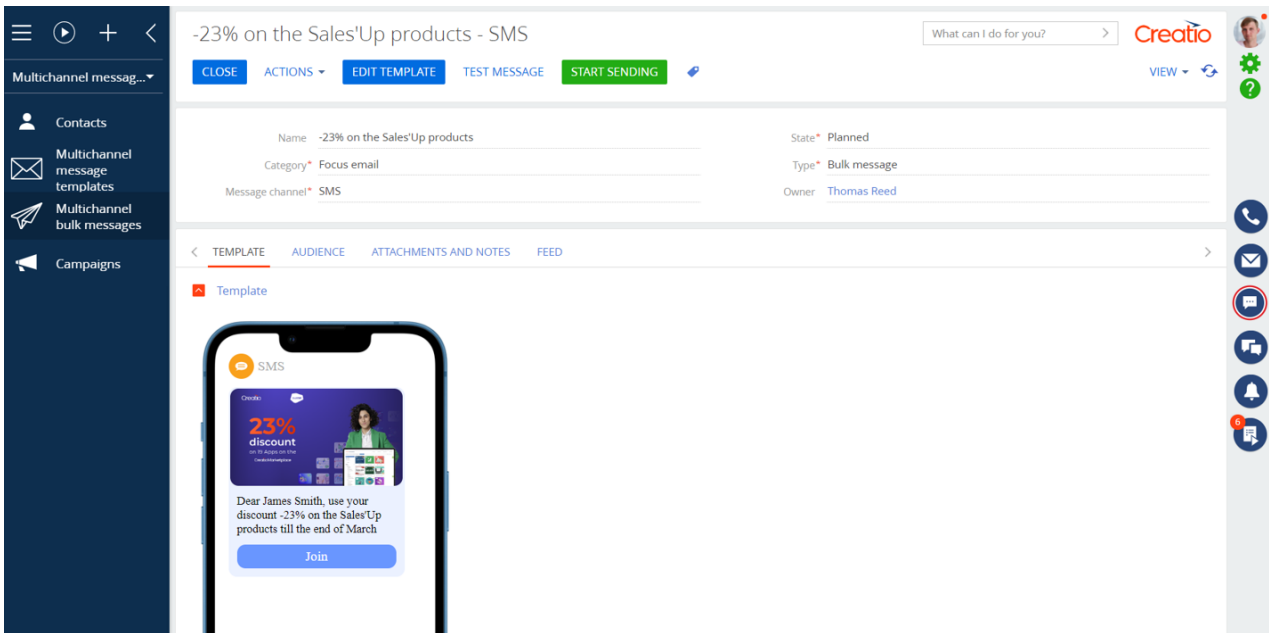
Setting up the audience

User can select specific contacts and also contact groups (contacts that are in dynamic groups) as message recipients by choosing a relevant option when adding the audience to the «Audience» detail.
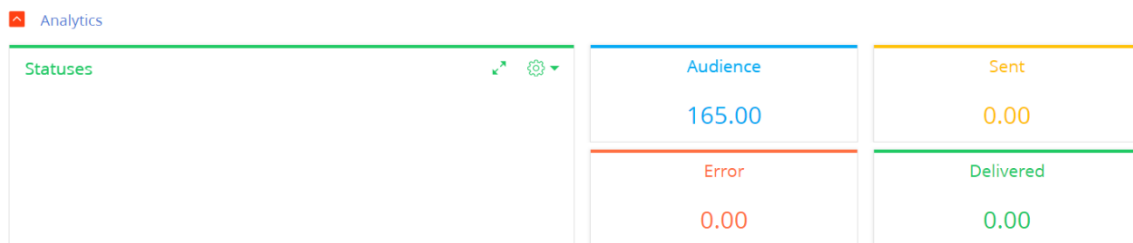
In the same tab there is an «Analytics» detail available for a user, which displays the analytical information on the current bulk message, for example, a number of sent and received messages.

Test message

Before running the bulk message, a user can send a test message in order to review its appearance, and ensure that it is the exact same as the selected audience is supposed to receive. It is possible to do that by pushing the «Test message» button and specifying the contact, who is going to be a recipient of a test message.

User can modify it after testing a message display if needed.

Starting the bulk messaging

To start a bulk message, press the «Start sending» button and confirm the action by clicking «Yes».
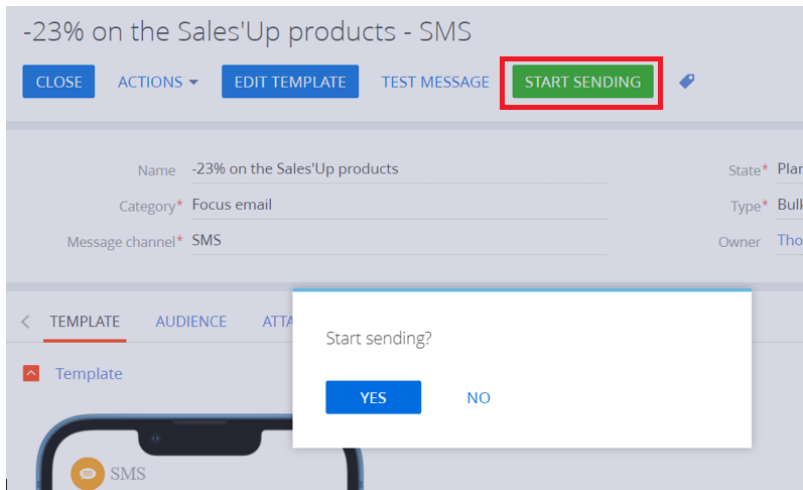
In the process of sending of a message, it is possible to interrupt it by pressing the «Stop sending» button.

Setting up trigger messages

To set up trigger messages, go to the «Multichannel bulk messages» section and press the «New» button by selecting the «Trigger message» option.
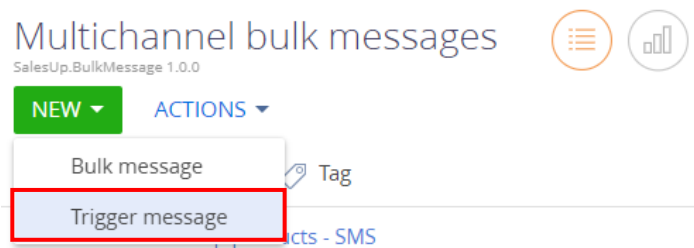
Template and audience for trigger messages identically to bulk messages described in the guide above.

Important!

1. Trigger message starts automatically and sending of a message is initiated by adding new participants during the execution of some processes.

2. For the Creatio Marketing product, trigger messages can be started from the «Campaigns» section.

CONTACT US:

salesup-it.com

+38 050 140 11 22
Kyiv, Lobanovskoho Avenue, 119B