

# MasterCRM eSputnik integration for Creatio. User Manual.



**MASTERCRM.**

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## Setting up the working environment

1. Fill in "Espunik accounts" lookup.

*Username* — Username you use to authorize in the Espunik personal account.

*Password* — Password you use to authorize in the Espunik personal account.

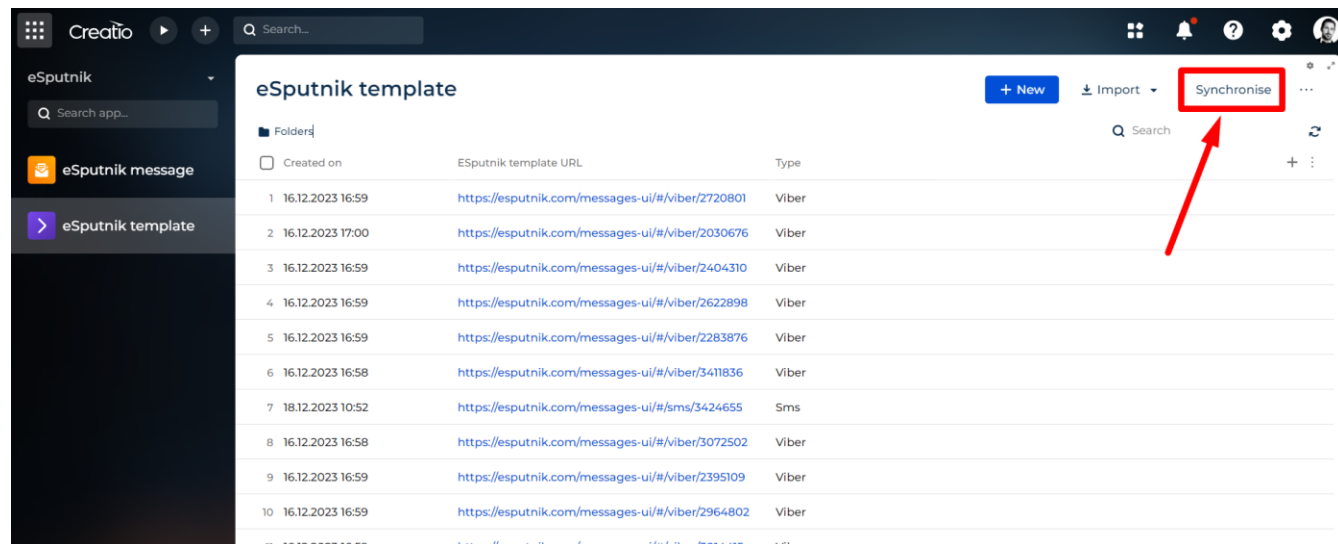
*Load SMS templates / Load Viber templates? / Load Email templates?* —  
Choose templates by type you will use (can be all of them)

2. Choose created Espunik account (or any other) as default in system setting "Espunik default account" ("MscEspunikDefaultAccount")
3. Run process "Get Sms Senders" (MscGetSmsSenders) for synchronize Sms Senders, from Espunik personal account

## Work with the templates

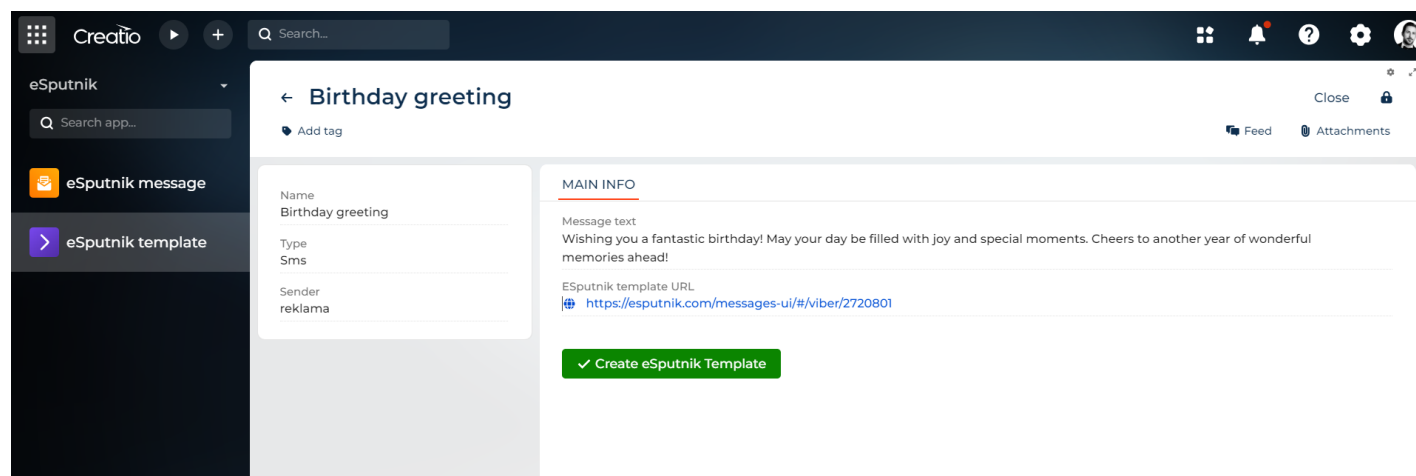
Espunik template section contains all template you have been created in your Espunik personal account.

To download all Espunik templates into Creatio, click Synchronise button on Espunik template section. Only templates of the chosen types in the “Espunik accounts” lookup will be downloaded.



You can manage the number of downloaded templates using system setting Espunik count of downloaded templates (MscCountOfDownloadedTemplates). Default value = 1000 templates of each type

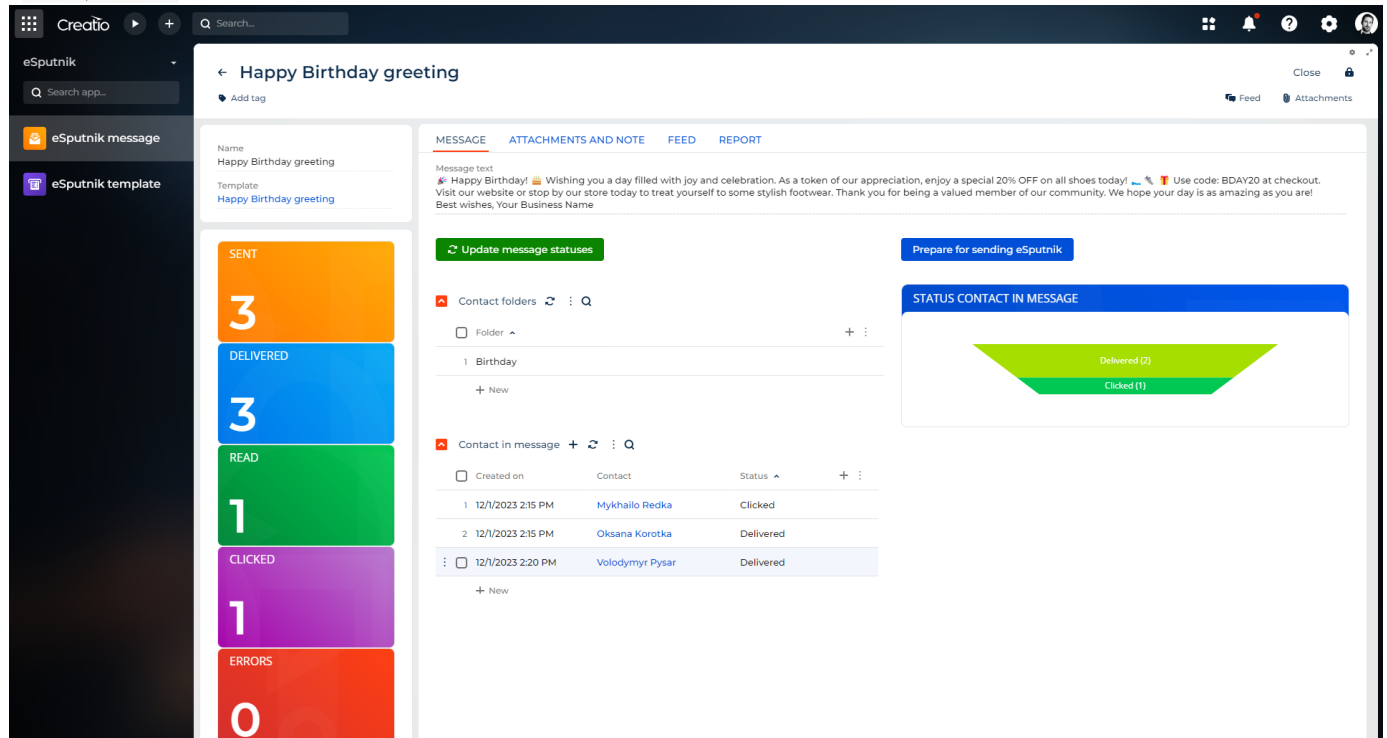
Additionally, you can create a new Espunik template in Creatio (Only for SMS templates, and only if you have Espunik senders)



After creating a template and filling in the fields (Name, Type, Espunik account, Sender, Message text), save the record and click “Create eSputnik template” button. This operation will create a template in espunik, fill “ESputnik template URL” field in the template, and make it usable for creating the messages.

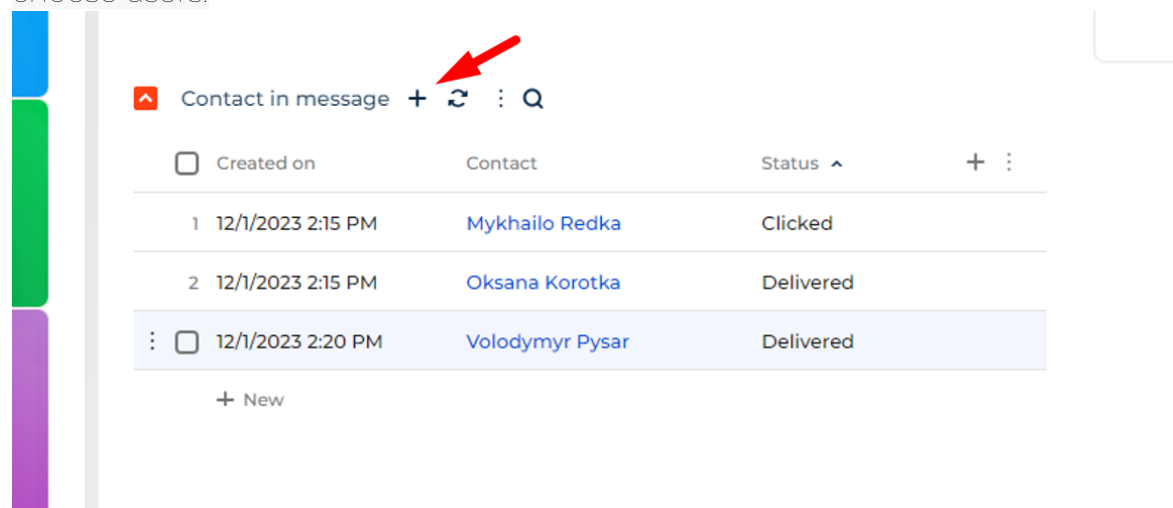
## Creating message

To create a new Esputnik message you should select Template, and fill in the Name (not required but recommended). Field “Esputnik account” will be filled with default value from system setting “Esputnik default account” (“MscEsputnikDefaultAccount”). You can choose any account you need, to filter templates.

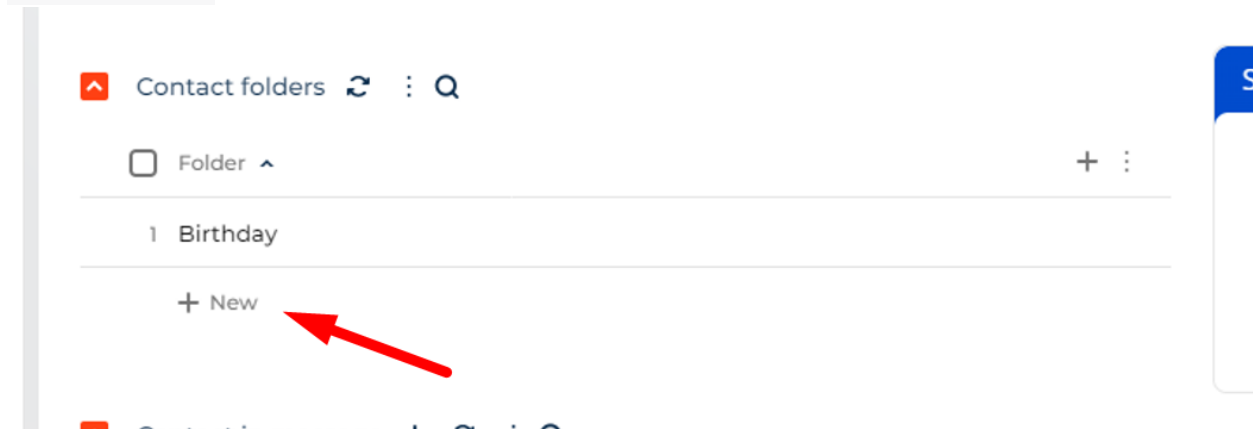


After creating and saving a new Esputnik message record, add an audience. There are two ways to do this.

First – add new users individually, click plus in “Contact in message” detail, and choose users.



Second, and more practical way, is to add a new folder (or folders), in “Contact folders” detail.

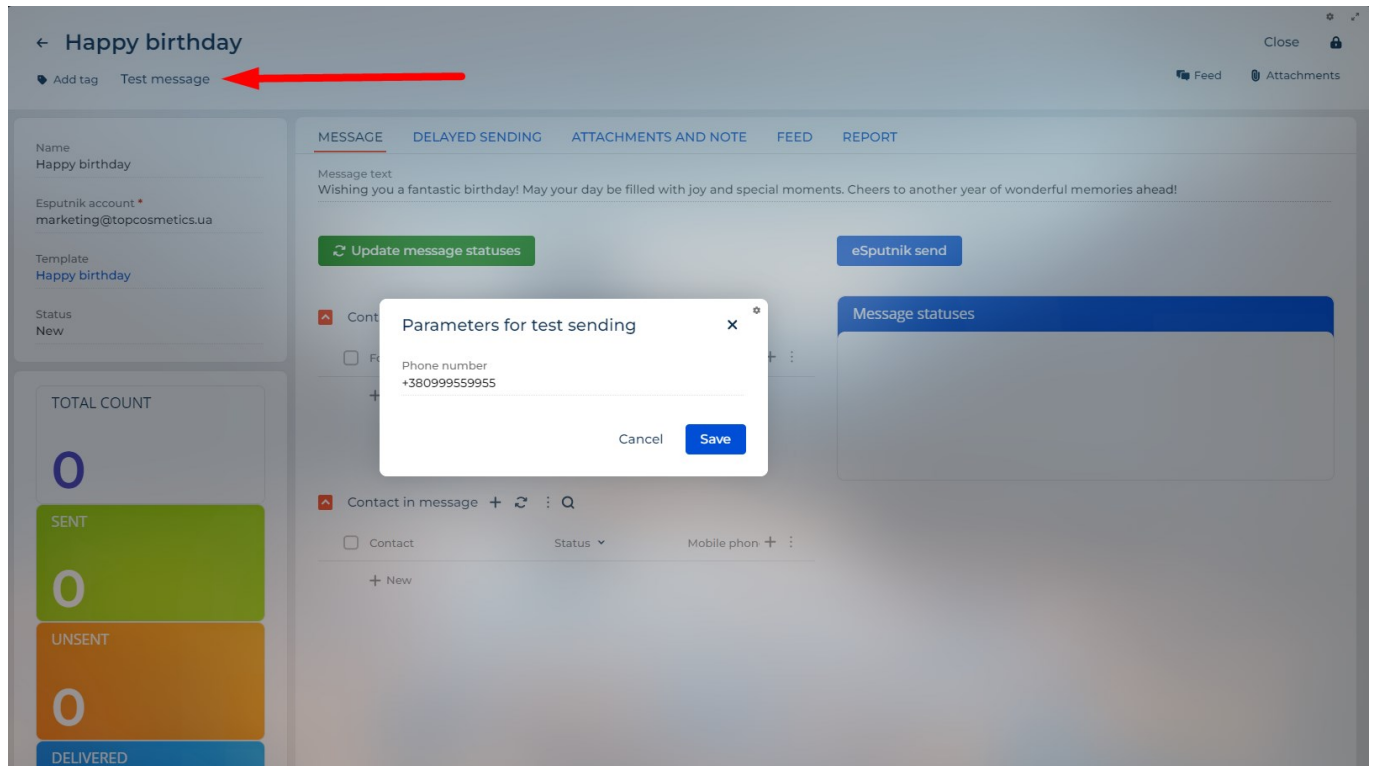


As a result – contacts from the folder will be automatically added to the “Contact in message” detail. You can combine this two methods, to achieve flexibility in choosing audience for the message.

Note: there is a duplicates avoiding check in the "*Contact in message*" detail.

## Message check

There are situations sometimes when you need to check template is correct, and it looks good actually on phone screens. For this purposes, we added "Test message" functionality. It allows you to send test SMS or Viber message on specified phone numbers by just two clicks!



## Sending message

When the template and the audience selected, you are ready to send the message. Just click the “Prepare for sending eSputnik” button, and your message will be sent to the eSputnik service for processing.

The screenshot shows the 'Happy Birthday greeting' message preparation interface. The left sidebar displays statistics: SENT (3), DELIVERED (3), READ (1), CLICKED (1), and ERRORS (0). The main area shows the message text: 'Happy Birthday! 🎉 Wishing you a day filled with joy and celebration. As a token of our appreciation, enjoy a special 20% OFF on all shoes today! 🛍️ Use code: BDAY20 at checkout. Visit our website or stop by our store today to treat yourself to some stylish footwear. Thank you for being a valued member of our community. We hope your day is as amazing as you are! Best wishes, Your Business Name'. Below the message text, there is a 'Prepare for sending eSputnik' button highlighted with a red arrow. The interface also shows a list of contacts and a 'STATUS CONTACT IN MESSAGE' section with a bar chart showing 'Delivered (2)' and 'Clicked (1)'.

There is a possibility to send delayed messages. Just open “Delayed sending” tab, choose sending date and time, save record, and click “Delayed send” button.

The screenshot shows the 'Happy birthday' message preparation interface with the 'Delayed sending' tab selected. The interface displays a 'Delayed sending date' field set to '15.05.2024 18:30' and a 'Delayed send' button. The left sidebar shows the 'eSputnik message' section with a search bar and a list of contacts. The main area shows the message text and a 'TOTAL COUNT' section with statistics: SENT (0), UNSENT (0), and DELIVERED (0).



## Update statuses

MasterCRM eSputnik integration for Creatio allows update message statuses automatically, using Creatio webhook functionality.

For setting webhook, you should retrieve webhook URL according to the Creatio Academy (<https://academy.creatio.com/documents?id=2412>). Next, you need to paste this webhook URL into Espotnik cabinet, according to <https://esputnik.com/uk/support/vebhuki-webhooks>

Your message statuses will be updated automatically!

You can update message statuses manually, by clicking the “Update message statuses” button.

