Define Message Recipients

v8.5 and earlier

Overview

You can define recipients, conditions for recipients, queues, and distribution lists for a message.

Message Recipient Options

Message Section	Action	Required/Optional
Condition	Click the three dots next to the condition text box to define a condition for which users the message is sent to. If the result of the condition is true, the message is sent to the recipients.	Optional

Message Section	Action	Required/Optional

Recipients List	1. Click the three dots next to the recipients list text box.
	2. Use the **Select Type** drop-down menu to filter the recipients list.
	3. Select at least one recipient for the message.
	4. Define the recipient's Role and Hierarchy.
	   - **Direct**: Users assigned to the selected role in the current department.
	   - **X2**: Users assigned to the selected role, located one level up in the organization.
	   - **X3**: Users assigned to the selected role, located two levels up in the organization.
	   - **Top**: Users assigned to the selected role, at the top of the organizational structure.
		Required

Queue Mode	This option is for messages that are part of a task, and if you selected more than one recipient. Select a queue mode to distribute the message. - Default: The task is sent to all recipients and any recipient can complete the task. - Auto Fetch Current User Queue: If one of the users in the queue is the user that completed the previous form, the task is automatically fetched to that user.. - Load Balancing Queue: The task is sent to the recipient with the least assigned tasks. - Broadcast Queue: The task is sent to all recipients and only the recipient that fetches the task can complete the task. **IMPORTANT**: If you select a queue option, you can only select one distribution list.	Optional
Add Distribution List	Select this check box to add an additional distribution list.	Optional

v8.6 and later

Overview

You can define message recipients by user, group, external user, process role, or employee role.

Message Details for Task1 (?)

| Message | **Recipients** | Properties | Reminder | Attachments | More Options |

Condition (optional) [_____] [...]   Queue Mode [Broadcast Queue ▾]   ✕ Delete List

Type	Recipient	Role	Hierarchy		
Group	Case Management Entire Organization/Case Management	Manager	Direct	✏	✕
User	System Administrator g.smtp.send@gmail.com	Employee	X2	✏	✕

[Add Recipient ▼]

+ Add Distribution List

[Back] [Next] [OK] [Cancel]

Recipient settings

Setting	Description
Condition	You can set a business rule to determine conditions for when to send the message to the specified recipients.
Add Recipient	Adds a new row to the distribution list. You can select the following types of recipients: • Group: List of the groups defined for the organization. • Group Expression: Create an expression to define the required group, or multiple groups. • User: List of the users registered in the system. • User Expression: Create an expression to define the required user, or multiple users. • External User: Enter an email address, or multiple email addresses separated by commas. You can also use an expression that returns the required email addresses. • Process Role: Set recipients by their role in the process: creator of the message or task, or recipient of the message or task. • Employee Role: List of the employee roles defined in the system.

Setting	Description
Recipient	Displays a list of options depending on the type of recipient that you added. You can also enter an expression.
Role	Displays the employee roles defined in the system.
Hierarchy	Displays a list of hierarchy options. • Direct (default): Send message to the selected role. • X2: Send message to a recipient located one level up in the organization. • X3: Send message to a recipient located two levels up in the organization. • Top: Send message to a recipient located at the top of the organizational structure.
Queue Mode	This field is available only for task messages. • Default: The task is sent to all recipients and any recipient can complete the task. • Auto Fetch Current User Queue: If one of the users in the queue is the user that completed the previous form, the task is automatically fetched to that user. • Load Balancing Queue: The task is sent to the recipient with the least assigned tasks. • Broadcast Queue: The task is sent to all recipients and only the recipient that fetches the task can complete the task.
Add Distribution List	Adds an additional distribution list. **IMPORTANT**: If you select a queue mode, keep only one distribution list.

Define recipients

1. On the Recipients tab, to insert a recipient, click **Add Recipient**, and then select a recipient type.
2. Define the recipient according to the recipient type you selected.

3. Assign a role for the recipient or recipients that you selected.

4. Assign the required hierarchy level.
5. To confirm the recipient settings, click the insert button (✔).
    The recipient row is added. You can add additional recipients or start a new distribution list.