



Service **Autopilot**™

# EMAIL ACTIVITY

USER GUIDE

V2.7

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## About Email in Service Autopilot

There are several reasons you may send emails in Service Autopilot. Pro and Pro Plus Members can send Email Blasts and Bulk Emails to a group of clients from the Dispatch Board or Client List. But all Members can do Invoicing via email and send out several Estimates at once.


Whether you're sending thousands, a few, or just one email, being able to track your email activity efficiently can mean the difference between making and losing money, keeping and losing clients, and keeping and losing your good standing with clients. On the **Email Activity** screen, you can see if your emails are being received, read, bouncing, etc. and more effectively manage your client relationships.

Any email sent to clients, whether individually or as part of a batch, will appear on the Activity Stream of the Account where the email was sent.

**Note:** Unless an Email Integration subscription is purchased, email in Service Autopilot is one-way; emails can only be sent from SA. Incoming emails or replies will not appear in your SA account. Instead, they return to the email address where the original message was sent from. You would need to log into your email account to see any replies.

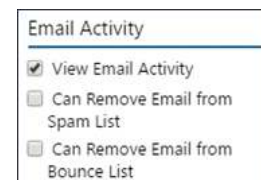
## Set Up Permissions for Email Activity

Everyone has access to the **Email Activity** screen, regardless of your subscription level. Follow these steps to set up permissions for it.

1. Go to  **Settings > User Roles & Rights**, and select a role.
2. Click the "CRM" tab.

The **Email Activity** check boxes are at the bottom of the screen.

3. Check the **View Email Activity** check box for access to the screen.
4. If needed, check the other permissions to remove emails from the Spam or Bounce lists.



## Send Email to Individual Clients

Go to an individual client's record and choose to email that client.

The email will appear in the Client Timeline and in the Email History on the **Dashboard** screen.

1. Go to **CRM > Clients**
2. Click a client and select **Send > Email**

*"The man who stops advertising to save money is like the man who stops the clock to save time." – Thomas Jefferson*

## Send Batch Email to Selected Clients

A large part of the email you do in the system will be Batch Email. You can create a Batch Email from various places in Service Autopilot. Invoicing and Marketing Email Blasts are probably the most likely uses, but you can also send email batches from the Client List, Dispatch Board, and Estimates List.

1. Go to **CRM > Clients**
2. Select the check box for multiple clients.
3. Click **Actions > Marketing**.
4. In the Email Editor, type new text or insert a form or document, then click **Send**.

All selected clients will receive the email.

## Send Email from the Dispatch Board

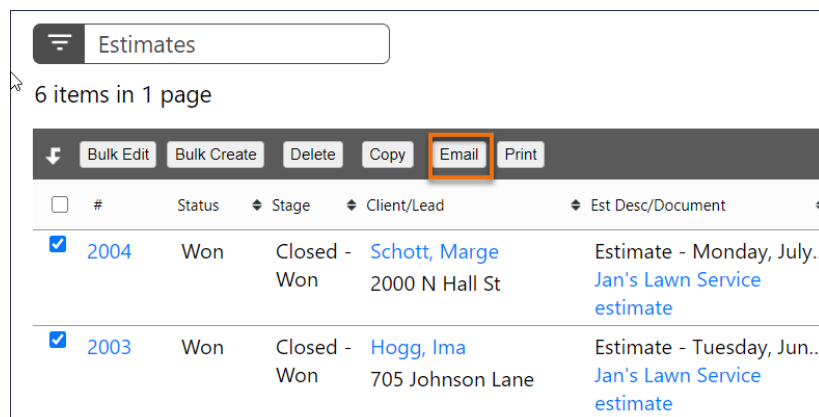
The Dispatch Board allows you to email several clients at one time. You might use this to notify one or more clients of scheduling changes due to weather.

1. Go to **Scheduling > Dispatch Jobs**
2. Select the check box for multiple clients.
3. Click **Actions > Email Clients** under “Communications”
4. In the Email Editor, type new text or insert a form or document, then click **Send**.

## Send a Batch of Estimate Emails

The **Estimates** List gives you the option of selecting multiple Estimates and sending them an email.

1. Go to **CRM > Estimates**
2. Select the check box for one or more clients.
3. Click the **Email** button.
4. In the Email Editor, type new text, or insert a form or document
5. Click **Send**.

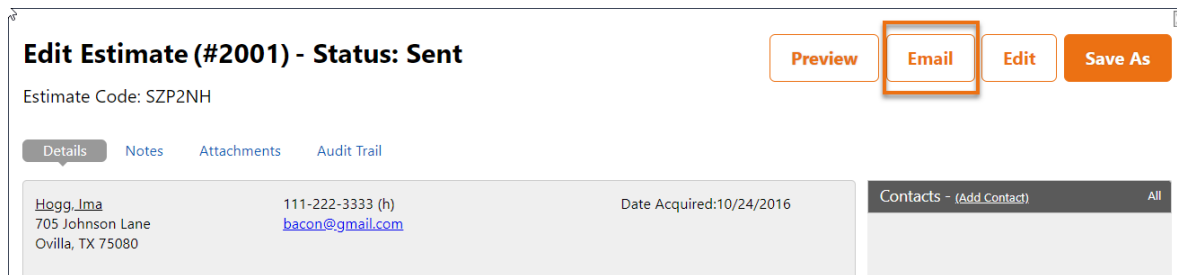


<input type="checkbox"/>	#	Status	Stage	Client/Lead	Est Desc/Document
<input checked="" type="checkbox"/>	2004	Won	Closed - Won	Schott, Marge 2000 N Hall St	Estimate - Monday, July... Jan's Lawn Service estimate
<input checked="" type="checkbox"/>	2003	Won	Closed - Won	Hogg, Ima 705 Johnson Lane	Estimate - Tuesday, Jun... Jan's Lawn Service estimate

## Send an Individual Estimate Email

You can use the **Email** button from within an individual Estimate.

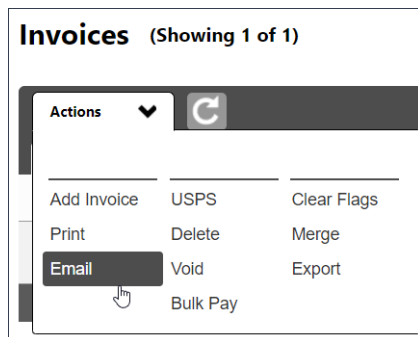
1. Go to **CRM > Estimates**.
2. Click an estimate number to select it.
3. Click the **Email** button at the top of the Edit screen.



4. In the Email Editor, type new text or insert a form or document.
5. Click **Send**.

## Send Email from the Invoices Screen

1. Go to **Accounting > Invoices**.



2. Select the check box for one or more clients.
3. Click **Actions > Email**.
4. The Email Editor opens with the invoice attached.
5. Edit the text if needed, then click **Send**.

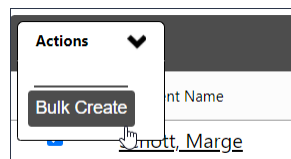
## Add or Remove Tags in Email Activity

You can add or remove Tags in bulk from each of the Email Activity lists. Here are some examples of how you might use this feature:

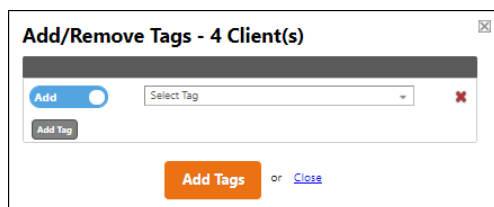
- Add a Tag to Accounts that have not successfully received emails
- Remove a Tag from Accounts that were previously bounced or suppressed and are now delivering successfully

To add or remove tags within **Email Activity**, follow these steps.

1. Go to **Marketing > Email Activity**
2. Click any tab that lists multiple clients, such as “DELIVERED” or “BOUNCED.”
3. Select the check boxes for one or more clients in the list.
4. Click **Actions > Bulk Create**.



5. In the **Add/Remove Tags** dialog use the toggle switch to designate whether you're adding or removing a Tag. It will default to **Add**.

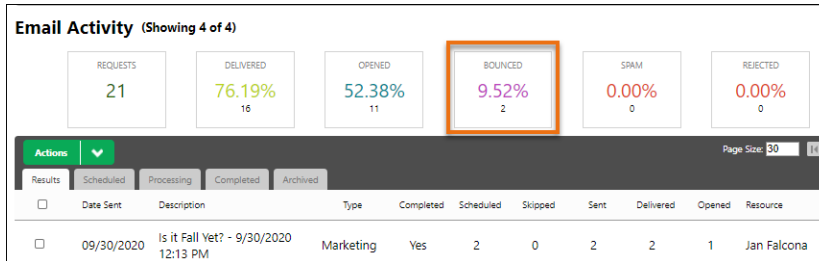


6. Select the Tag(s) you want to add or remove. You can add or remove multiple Tags at the same time by clicking the small gray **Add Tag** button.
7. Click the orange **Add Tags** button to complete the action.
8. Repeat if needed to add more tags, then click **Close**.

## Remove Bounced Emails

You can remove emails from the Bounced list by following these steps.

1. Go to **Marketing > Email Activity** and click “BOUNCED.”



**Email Activity (Showing 4 of 4)**

REQUESTS	DELIVERED	OPENED	BOUNCED	SPAM	REJECTED
21	76.19% 16	52.38% 11	9.52% 2	0.00% 0	0.00% 0

**Actions** [v] Page Size: 30 [14]

Results	Scheduled	Processing	Completed	Archived																
<input type="checkbox"/>	Date Sent	Description	Type	Completed	Scheduled	Skipped	Sent	Delivered	Opened	Resource										
<input type="checkbox"/>	09/30/2020	Is it Fall Yet? - 9/30/2020 12:13 PM	Marketing	Yes	2	0	2	2	1	Jan Falcona										

2. On the **All Bounced Emails** screen, select the check box for one or more clients.
3. Click **Actions > Remove From Bounce List**.

This removes those emails and refreshes the list of Bounced Emails.

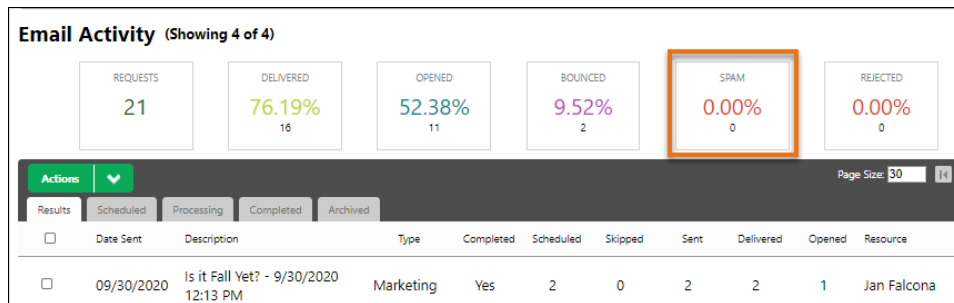
**Note:** You may have hundreds of bounced emails in this list; if you select one person’s email address to remove it, remember that you may have sent several emails to that person, so removing one address might reduce your bounce list by a greater number.



## Remove Spam Emails

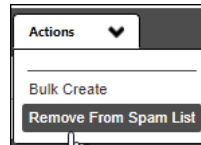
If you have the permissions enabled to remove emails from the Spam list, you can remove one email at a time by following these steps.

1. Go to **Marketing > Email Activity** and click “SPAM.”



2. On the **All Spam Emails** screen, select the check box for an email.

3. Click **Actions > Remove From Spam List**.



4. In the dialog box, enter a reason for removing that address from the list.

5. Click **Remove from Spam**.

**Remove from Spam List** [Close]

You are about to remove this email from the spam list.

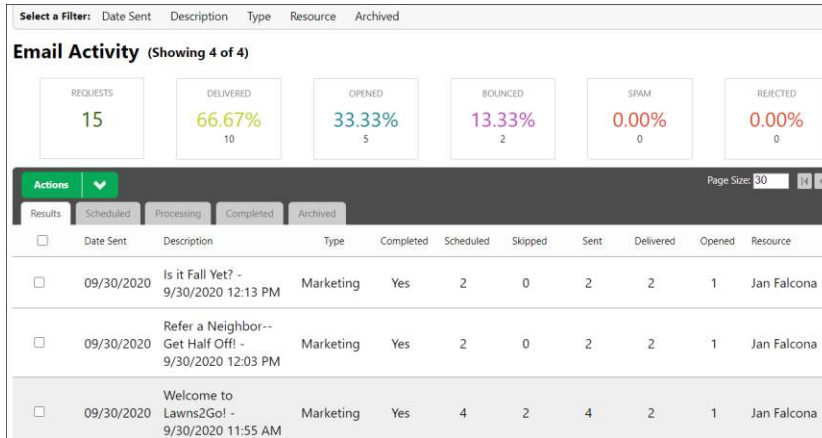
Please enter the reason for this action.

**Remove from Spam** Cancel

# Email Activity Overview

The **Email Activity** screen at **Marketing > Email Activity** lists general information about emails and batches you've sent.

The boxes across the top give data on emails statuses. You can click on each box for additional information.

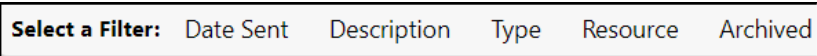


Individual batches or emails are listed in the grid on the lower part of the screen.

Date Sent	Description	Type	Completed	Scheduled	Skipped	Sent	Delivered	Opened
09/30/2020	Is it Fall Yet? - 9/30/2020 12:13 PM	Marketing	Yes	2	0	2	2	1
09/30/2020	Refer a Neighbor-- Get Half Off! - 9/30/2020 12:03 PM	Marketing	Yes	2	0	2	2	1
09/30/2020	Welcome to Lawns2Go! - 9/30/2020 11:55 AM	Marketing	Yes	4	2	4	2	1
09/30/2020	Lawns2Go Fall Special! - 9/30/2020 11:39 AM	Marketing	Yes	3	3	3	1	0

The list orders by **Email Date**, from newest to oldest.

- Click the arrows at the top of any column to change the sort order.
- Use the filters at the top of the screen to sort the emails. This will help you to locate clients, emails with errors, etc.



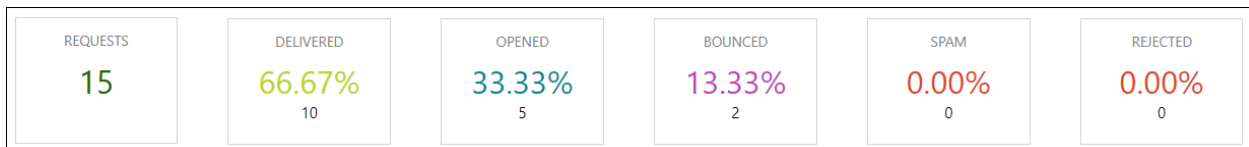
- Click any line to get detailed information about a specific group of emails.

## Email Statuses Explained

Email functionality in Service Autopilot is one-way; emails can only be sent from SA (unless an Email Integration subscription has been purchased). Incoming emails or replies will not appear in your SA account. Instead, they return to the email address where the original message was sent from. You would need to log into your email account to see any replies.

An **Email Request** is any email you have sent or tried to send from SA. A request is essentially asking the system to deliver an email. An **Email Status** tells you whether or not a Request was successful.

The boxes across the top of the **Email Activity** screen display cumulative numbers for all the trackable email you have sent in the system.



Clicking into each box takes you to a new tab for that specific category, where you can see more detailed information.

### REQUESTS

When you send emails through Service Autopilot, you are essentially **requesting** that the system deliver the email. The number in this box represents the total number of emails you have tried to send through the system. When your application or server attempts to send an email to one of your customers via Service Autopilot, we record that as a “request” to your Dashboard.

### DELIVERED

An email displays as Delivered when the sent email is accepted by the receiving server. Important: An email accepted by a receiving server does not mean the email reached the recipient’s inbox. This can happen when users or email applications use rules to filter emails away from specific inboxes. As a result, the email may sit unread in another folder that is not the main inbox. When an email is indicated as delivered, you can be certain only that it was not rejected in some way by the Internet Service Provider (ISP).

If an email is indicated as delivered you can be certain only that it was **not rejected in some way by the ISP**.

### OPENED

An email displays as Opened when the email has been opened. However, not all emails physically opened will display with the status of Opened. This is due to how certain email providers load images from an email. To track Opened emails, SA inserts a small transparent image to all outgoing emails. Most times, when the recipient opens the email, the image will automatically load – which notifies SA that the email has been opened. However, not all email providers automatically load the image, so SA gets no notification (even when it has been physically opened).

## BOUNCED

An email displays as Bounced when it is returned to the server.

**Hard Bounce** - A hard bounce returns an email to the sender because of an invalid email address. When this happens, future requests to send emails to the invalid email address will be rejected.

**Soft Bounce** - A soft bounce will get as far as a recipient's email server but returns before getting to the intended recipient; this is a temporary status. This can happen when a recipient's inbox is full or when there are widespread Internet or email outages.

**Note: Validate each recipient's email address.** Most bounces occur because the addresses or domains are incorrect. Examples would include misspellings or typos like **davdi@yahoo.com** (instead of "david"), or **john@gmil.com** (instead of "gmail.com"), etc. Notice that "**gmil.com**" got through the rejection filter in SA because it follows proper format –ending with ".com" -- even though the domain is wrong.

## SPAM

An email can be marked as spam for a number of reasons. It could be because of the recipient's email server settings, or due to types of content contained in the email.

**Note:** It is always best to get approval to email a client or lead by sending an opt-in request.

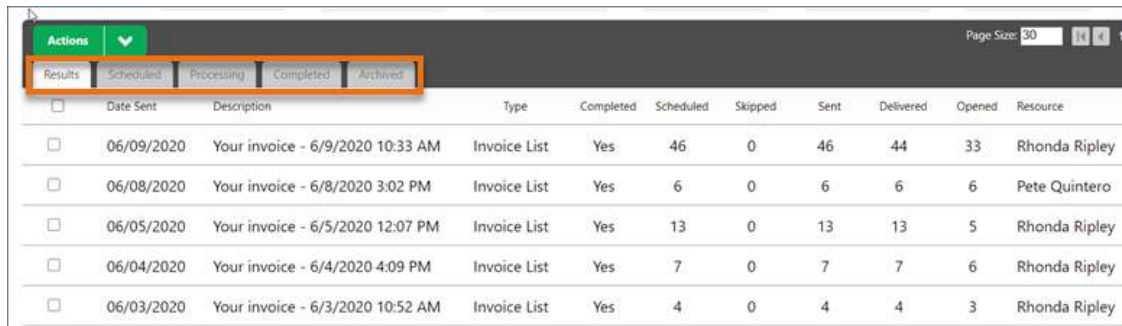
For tips, see "Avoid the Spam Folder (or, *Don't Be That Guy*) on page 20.

## REJECTED

The email has been removed from your outgoing list before being sent. The system removes the emails before attempting to send them.

## Email Activity Screen Tabs

The **Email Activity** screen at **Marketing > Email Activity** has five tabs that indicate the status of your email: **Results**, **Scheduled**, **Processing**, **Completed**, and **Archived**.



<input type="checkbox"/>	Date Sent	Description	Type	Completed	Scheduled	Skipped	Sent	Delivered	Opened	Resource
<input type="checkbox"/>	06/09/2020	Your invoice - 6/9/2020 10:33 AM	Invoice List	Yes	46	0	46	44	33	Rhonda Ripley
<input type="checkbox"/>	06/08/2020	Your invoice - 6/8/2020 3:02 PM	Invoice List	Yes	6	0	6	6	6	Pete Quintero
<input type="checkbox"/>	06/05/2020	Your invoice - 6/5/2020 12:07 PM	Invoice List	Yes	13	0	13	13	5	Rhonda Ripley
<input type="checkbox"/>	06/04/2020	Your invoice - 6/4/2020 4:09 PM	Invoice List	Yes	7	0	7	7	6	Rhonda Ripley
<input type="checkbox"/>	06/03/2020	Your invoice - 6/3/2020 10:52 AM	Invoice List	Yes	4	0	4	4	3	Rhonda Ripley

**Note:** Some clients or their email providers may have configured their email accounts to prevent companies from gathering statistical information from emails. Those emails will not return any stats.

### Results Tab

The “Results” tab appears when you go to **Marketing > Email Activity**. This screen contains the full list of batch emails that have been created, except for those you’ve archived.

If the “Completed” column shows “**Failed**” it means there was an error.

### Scheduled Tab

Depending on the size of the batch you’re sending, the traffic on SA servers, and the number of other requests for email that are pending at the time of your request, you may see a batch sitting on the “Scheduled” tab for a few minutes, similar to a document in a printer queue. As other Batch Email requests are processed, yours will move in the queue from “Scheduled” to “Processing.”

Your batch may be in this stage for only a few seconds, or during times of heavy traffic such as Invoicing days, the batch may take longer to progress.

### Processing Tab

This tab lists emails that are in the process of being sent. The speed of this operation depends on traffic, the size of the batch, and how easily email addresses are verified. As soon as email is finished processing, the batch moves to the “Completed” tab.

### Completed Tab

Emails on the “Completed” tab have been sent and all processes in SA have been completed. Now, you can check on the status of those emails by clicking into an Email Batch line on the main screen.

### Archived Tab

The “Archived” tab contains emails you have sent to archive.

## Archive or Restore Emails

You may decide to archive some email batches to help organize your data. You have the option to restore them from the “Archived” tab.

### Send Batch Emails to Archive

1. Go to **Marketing > Email Activity**.
2. Select one or more batch emails.
3. Click **Action > Archive**.

The email batch is moved to the “Archived” tab.

### Restore Archived Batch Emails

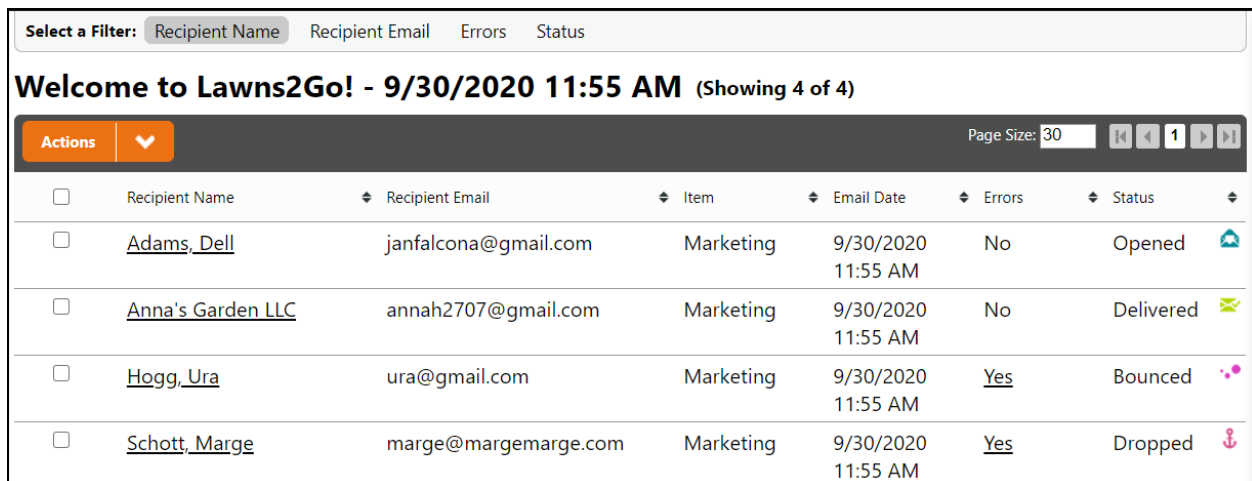
1. Go to **Marketing > Email Activity** and click the “Archived” tab.
2. Select one or more batch emails.
3. Click **Action > Restore**.

The email batch is moved back to the “Results” tab.

## Check the Delivery Status of Batch Emails

On the **Email Activity** screen, you can select a line item from the list of Batch Emails to see the status of your email. In other words, where is it in the journey to reach each intended recipient?

In this example, we clicked the Batch Email titled “Welcome to Lawns2Go!”



The screenshot shows a web interface for email activity. At the top, there's a filter bar with 'Recipient Name' selected. Below it, the title of the batch email is 'Welcome to Lawns2Go! - 9/30/2020 11:55 AM (Showing 4 of 4)'. There's an 'Actions' button and a 'Page Size' dropdown set to 30. The main content is a table with columns: Recipient Name, Recipient Email, Item, Email Date, Errors, and Status. Each row has a checkbox on the left and an icon on the right.

<input type="checkbox"/>	Recipient Name	Recipient Email	Item	Email Date	Errors	Status	
<input type="checkbox"/>	<a href="#">Adams, Dell</a>	janfalcona@gmail.com	Marketing	9/30/2020 11:55 AM	No	Opened	
<input type="checkbox"/>	<a href="#">Anna's Garden LLC</a>	annah2707@gmail.com	Marketing	9/30/2020 11:55 AM	No	Delivered	
<input type="checkbox"/>	<a href="#">Hogg, Ura</a>	ura@gmail.com	Marketing	9/30/2020 11:55 AM	<u>Yes</u>	Bounced	
<input type="checkbox"/>	<a href="#">Schott, Marge</a>	marge@margemarge.com	Marketing	9/30/2020 11:55 AM	<u>Yes</u>	Dropped	

Seeing the status of emails can help you troubleshoot problems. For example, if you see bounced emails, you might be able to call your client to see if you used a bad email address.

- Click a client's name– notice that it's an underlined link – to go to the **Client** screen for that client.
- Click anywhere else on an individual line to see the original email.
- Check the progress of the email delivery indicated by the “Status” column and the icon on the right.
- For more information, see “Email Status Icons” on page 13.

## Email Status Icons

The symbols on the right side of the screen indicate the status of the email.

### Delivered



Everything went smoothly and the email made it into the recipient's inbox. Do not mistakenly think each of these delivered emails was opened. We have no control over rules that your clients or their email programs might have set up to immediately move certain messages out of the inbox to other folders.

### Opened



Your email was opened by the recipient.

### Unopened



The message was delivered but hasn't yet been opened.

### Bounced



Bounced emails were neither opened nor received. You might have a bad email address, or the intended recipient might have a full inbox.

### Spam



This recipient's email program has rejected your email as Spam, or the recipient has marked the email as Spam.

### Dropped



The recipient of a dropped email is on a suppression list of some kind, whether spam or bounced, unsubscribed, or even an invalid email address. This email will not be delivered.

### Deferred



Deferred email cannot currently be delivered. This might be a server issue on the recipient's end that places the email in a holding pattern. Some deferred emails will be delivered eventually, but others may end up being bounced.

### Links Clicked



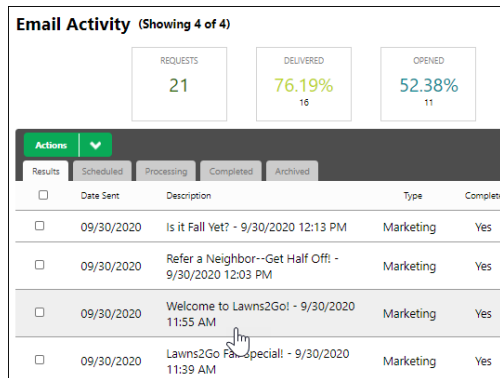
You sent a link within the email using one of our Personalization Fields. The recipient clicked on that link, such as to a Form, your Client Portal, or an Estimate acceptance page.



## Check Statistics for Your Batch Emails

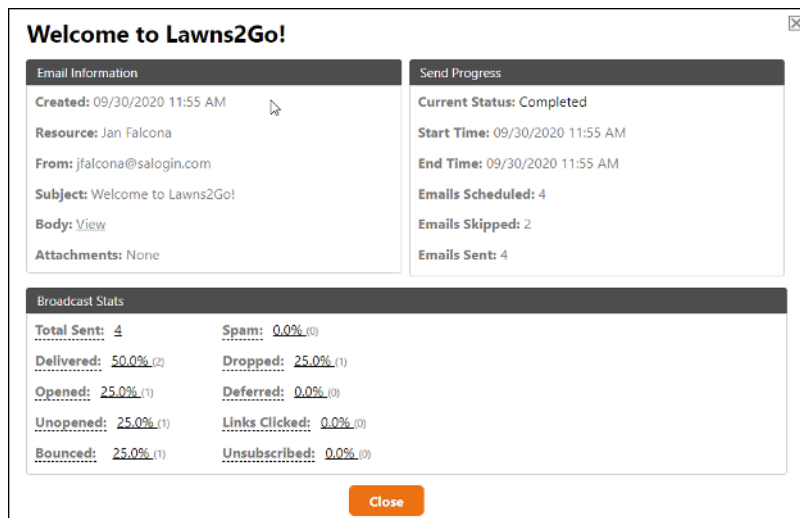
After sending batch emails, you can check delivery rates and other data on the **Batch Email Statistics** screen.

1. Go to **Marketing > Email Activity**.
2. Click on any batch email line.



Email Activity (Showing 4 of 4)			
REQUESTS	DELIVERED	OPENED	
21	76.19% 16	52.38% 11	
Actions			
Results	Scheduled	Processing	Completed
Date Sent	Description	Type	Complete
<input type="checkbox"/>	09/30/2020	Is it Fall Yet? - 9/30/2020 12:13 PM	Marketing Yes
<input type="checkbox"/>	09/30/2020	Refer a Neighbor--Get Half Off! - 9/30/2020 12:03 PM	Marketing Yes
<input type="checkbox"/>	09/30/2020	Welcome to Lawns2Go! - 9/30/2020 11:55 AM	Marketing Yes
<input type="checkbox"/>	09/30/2020	Lawns2Go Fall Special! - 9/30/2020 11:39 AM	Marketing Yes

The **Batch Email Statistics** for that email appears, with the subject line of the batch email at the top.



Welcome to Lawns2Go!	
<b>Email Information</b>	<b>Send Progress</b>
<b>Created:</b> 09/30/2020 11:55 AM	<b>Current Status:</b> Completed
<b>Resource:</b> Jan Falcona	<b>Start Time:</b> 09/30/2020 11:55 AM
<b>From:</b> jfalcona@salogin.com	<b>End Time:</b> 09/30/2020 11:55 AM
<b>Subject:</b> Welcome to Lawns2Go!	<b>Emails Scheduled:</b> 4
<b>Body:</b> <a href="#">View</a>	<b>Emails Skipped:</b> 2
<b>Attachments:</b> None	<b>Emails Sent:</b> 4
<b>Broadcast Stats</b>	
<b>Total Sent:</b> 4	<b>Spam:</b> 0.0% (0)
<b>Delivered:</b> 50.0% (2)	<b>Dropped:</b> 25.0% (1)
<b>Opened:</b> 25.0% (1)	<b>Deferred:</b> 0.0% (0)
<b>Unopened:</b> 25.0% (1)	<b>Links Clicked:</b> 0.0% (0)
<b>Bounced:</b> 25.0% (1)	<b>Unsubscribed:</b> 0.0% (0)
<a href="#">Close</a>	

The sections of this screen are explained below.

## Email Information

The top left section contains basic information about the selected email batch.

<b>Created</b>	The date and time stamp for the email.
<b>Resource</b>	The user who created and sent the batch email.
<b>From</b>	Generally, this is your Company Email, which is automatically used for outgoing messages. If you changed this for a specific batch, the alternate email would appear here.
<b>Subject</b>	The subject line of the batch and the name that the batch appears under on the <b>Email Activity</b> screen.
<b>Body</b>	From here, clicking <b>View</b> will open another dialog containing the body of the email you sent with any Personalization fields in brackets.
<b>Attachments</b>	SA does not save attachments with individual emails. So, although you cannot open attachments that you sent out with your batch, this field will list the names of any attachments that went out with it.

**Note:** Estimate emails always have a Quote attached, and Invoice emails always have an invoice attached, so those attachments will not be considered for this screen. Only Attachments that you manually add will appear

## Send Progress

This section shows where your batch email is in the process.

<b>Current Status</b>	This will be <b>Scheduled, Processing, Completed, Failed, or Archived.</b>
<b>Start and End Times</b>	This tells you when the batch began processing and when SA finished sending it.
<b>Emails Scheduled</b>	The total number of emails you originally intended to send when you clicked the <b>Send</b> button.
<b>Emails Skipped</b>	Any emails that did not make it out of the scheduled queue. For example, if the batch is coming from Marketing, the system will skip emails of clients who have opted out of Marketing Emails.
<b>Emails Sent</b>	The number of emails that have finished processing and are ready to be delivered. This is the total number of emails that you initially scheduled when you created your batch <i>minus</i> emails that were skipped.

## Broadcast Stats

The Broadcast Stats section gives a breakdown of what happened with the emails that went through the process, including the success rate of your batch and updates, and emails delivered or bounced.

**Note:** Once the emails have been sent, SA must wait for our email delivery service partner to get us the information on bounced emails, clicked links, etc. So if they get bogged down, your batch of emails might be placed in a processing queue, and this could delay updates in the **Broadcast Stats** section.

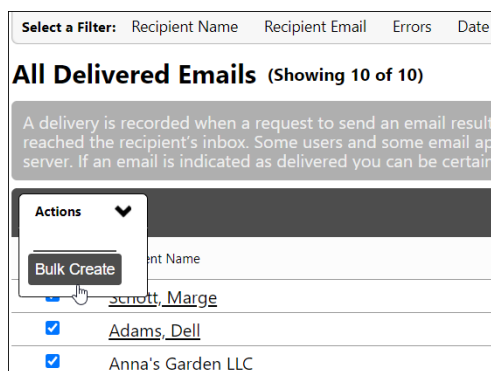
<b>Total Sent</b>	Click the number to see an unfiltered list of the emails that went out in the batch.
<b>Delivered</b>	Everything went smoothly and the email made it into the recipient's inbox. Do not mistakenly think each of these delivered emails was opened. SA has no control over rules that your clients or their email programs might have set up to immediately move certain messages out of the inbox to other folders.
<b>Opened</b>	Your email was opened by the recipient.
<b>Unopened</b>	The message was delivered but hasn't yet been opened.
<b>Bounced</b>	Bounced emails were neither opened nor received. You might have a bad email address, or the intended recipient might have a full inbox.
<b>Spam</b>	This recipient's email program has rejected your email as Spam, or the recipient has marked the email as Spam.
<b>Dropped</b>	This email will not be delivered because the recipient is on a suppression list of some kind. This might be because your email bounced, was considered spam, the client had unsubscribed, or there was an invalid email address.
<b>Deferred</b>	Deferred email cannot currently be delivered. This might be a server issue on the recipient's end that places the email in a holding pattern. Some deferred emails will be delivered eventually, but others may end up being bounced.
<b>Links Clicked</b>	You sent a link within the email using a Personalization Field. The recipient clicked that link, which might be to a Form, your Client Portal, or an Estimate acceptance screen.
<b>Unsubscribed</b>	Unsubscribed recipients would not receive an email. Service Autopilot determines which emails belong to unsubscribed clients before sending a batch. Also, if a recipient were to click on a (future) <b>Unsubscribe</b> link at the bottom of the email you send, that email would appear under this category.

## Follow Up On Batch Emails

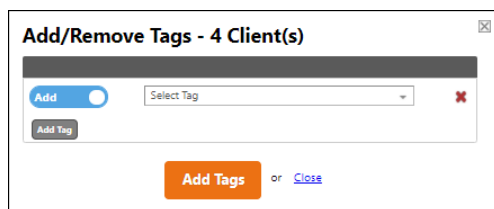
Some of the numbers for categories are clickable on the **Batch Email Statistics** screen. Clicking an individual, linked number takes you to a new screen that lists which client emails fell into that category.

From here, you might want to do some type of follow-up. Adding tags with **Bulk Create** can help you keep track:

1. Go to **Marketing > Email Activity** and select a batch email to see the list of recipients.
2. Select any recipients to contact again.
3. Click **Actions > Bulk Create**.



4. On the **Bulk Create** overlay, select one or more tags to apply to the client records.



5. Click **Add Tags** after each tag you select, then click **Close**.

## Email Attachments

Email Attachments can be received into SA assuming certain criteria are met. This allows your clients to send you photos, documents, and spreadsheets, and you will be able to find these within SA rather than having to go to your email provider to retrieve the attachments.

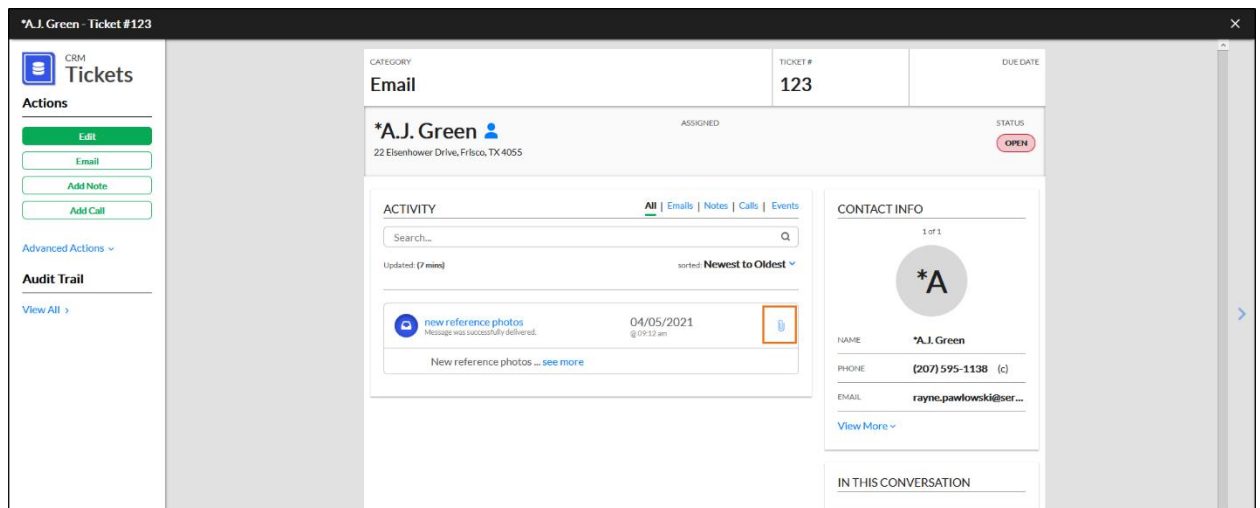
The size limit for email attachments is 20MB. This is a common size limit across most email providers and is more than enough space to accommodate most email attachments.

Not all file types can be successfully attached to an email. These are the supported file types that have been tested and verified to work:

- Common documents: .doc, .docx, .xls, .xlsx, .ppt, .pptx
- PDF's: .pdf
- Text documents: .rtf, .txt
- Photo files: .png, .gif, .jpg, .jpeg, .bmp

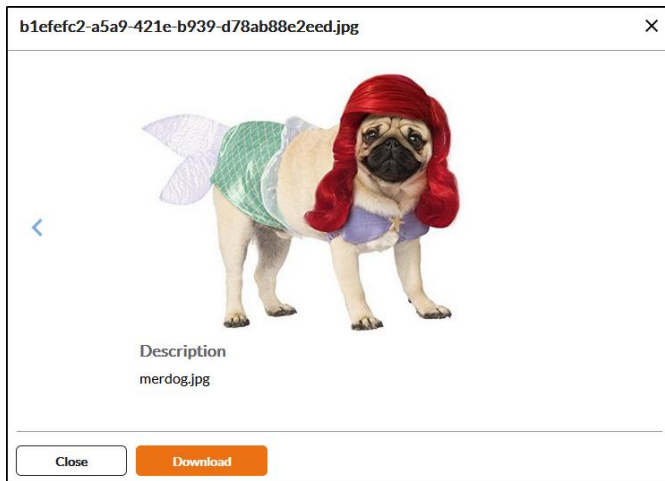
When an Attachment is received into SA, it will appear as a Ticket with the status of "open" like any other email (Note: this is contingent upon having an integrated email address).

1. To view an email attachment, open the Review Ticket overlay for the email and locate the paperclip icon:



2. Click the icon to view the attached items.

This will open an overlay where you can view and download the attachments:



3. Use the arrows at the sides of the overlay to scroll through the attached icons.
4. Close the overlay by clicking the **Close** button or the "X" in the upper right corner of the overlay.

## Avoid the Spam Folder (or, *Don't Be That Guy*)

An email can be marked as spam for a number of reasons. Some of these are because of the recipient's email server settings, the others are due to types of content contained in the sent email. The following are some examples of email contents that could reduce deliverability and potentially cause an email to be marked as spam.

**Note:** The following tips and suggestions can help improve deliverability but are not a guarantee of delivery or spam prevention. It's safer to get approval to email a client or lead by sending an opt-in request.

### What Spam Filters Look For

It is common practice for Internet Service Providers (ISPs) to protect their users with the help of spam filters. Using the wrong words or even characters in your email can trigger the spam filters and therefore throw your email into the spam folder.

The key thing to remember is that a spam filter is trying to remove commercial advertisements and promotions. So generally, words that are common in such emails should be avoided or used sparingly.

### Email Subject Trigger Words

Spam filters can be triggered for a variety of reasons, causing your email to skip recipients' inboxes and land straight in their spam box. Words in an email subject line that can trigger an email to go to a spam folder are known as **Trigger Words**. Avoiding these words in your email subject lines can dramatically increase your chances of getting beyond spam filters.

**Email Spam Words to Avoid:** free, affordable, discount, cheap, best price, cost, quote, save up to, call now.

### High Complaint Rate

If too many people are marking your email as spam, ISPs will take action and start sending your email to the spam folder. After that, they may start throttling your messages or even block them. Keeping an eye on the complaint rate is critical if you want to reach the Inbox.

### No Unsubscribe Link

It's important to give your clients the choice to opt out of a service with an **Unsubscribe** Link. Not adding an **Unsubscribe** link to emails will force a subscriber to hit the **Spam** button in order to stop receiving emails. Some studies have shown that you can lower complaint rates by simply placing the **Unsubscribe** link at the top of your emails, because this makes it easier to find.

**Note:** Service Autopilot adds an **Unsubscribe** link to all Marketing and Automation emails.

## High Frequency

The number one reason subscribers hit the spam or unsubscribe buttons in an email is just due to receiving too many emails. ISPs want to make sure that their users' mailboxes don't get crowded, and in order to protect their users from email fatigue, they can start junking the messages. To avoid this, it is important to include an **Unsubscribe** link in your emails. This lets your subscribers tell you how often they want to hear from you.

## Sending to Inactive Users

Subscribers often lose interest and stop opening emails over time. A common response for senders is to then send emails to more users. However, this will hurt your deliverability even more because ISPs have ways of monitoring the activity of the users. ISPs can check whether users open emails, click on links, and delete emails, or mark emails as spam. Basically, they monitor the users' level of responsiveness or engagement. Based on these metrics, ISPs decide whether the email goes to the inbox or spam.

## HTTP Versus HTTPS

You can tell your domain is secure if the URL has a small lock and "**https**" before the "**www.**" The "**S**" stands for secure: your HTTP request is using Secure Sockets Layer (SSL). SSL is a protocol used to secure communications between a client and server. The protocol uses encryption to keep hackers from seeing or hijacking your conversation, feeding you false information, and gathering information from you that you assume is protected.

## Rejected Email

An email is "Rejected" when it's removed from your outgoing list before it is sent. Reasons include:

### Opt-Outs

The person to whom you are attempting to send an email has requested not to receive Marketing or other notifications via email. They might have clicked an opt-out link, or you might have tagged that client as "Do Not Market."

### Invalid Address Formats

When sending an email to an invalid email address, it will be marked as **Bounced** first. This would catch things like "**fish@motorcycle**" because valid email formats need to end with dot-something.

Emails that appear in the correct format, even though they may have typos, will be *bounced*, instead of *rejected*. So, "**fsih@motorcycel.com**" would not be rejected, but it probably would be bounced.

## Want more information on SPAM Triggers?

Here is a list of words and phrases to watch out for: [100 Spam Trigger Words & Phrases to Avoid](#).