

HindSite Connect:

FAQ's

(Revised 3/2017)

Table of Contents

Basic Contact Information..... [3 – 4](#)

Job Contract Information..... [4 – 5](#)

Work Order Information..... [5 – 6](#)

Work Order Time Options..... [6 – 10](#)

Basic Company Information (Your Company)..... [10](#)

Lawn Maintenance Report Fields..... [10 – 11](#)

Miscellaneous..... [11](#)

Frequently Asked Questions..... [11 – 14](#)



HindSite Connect Email Fields

You can insert many HindSite fields into an email. To do so, you just use the following code: `~~FIELDNAME~~`. The list of possible field names can be found below:

Basic Contact Information	
Field Name	Code
Contact ID	~~Contact ID~~
Active Status	~~Active Status~~
Company Name	~~Company Name~~
Title	~~Title~~
First Name	~~First Name~~
Last Name	~~Last Name~~
Management Company	~~Management Company~~
Property Mgmt. Flag	~~Property Mgmt. Flag~~
Division	~~Division~~
Alternate Contact	~~Alternate Contact~~
Service Address 1	~~Service Address 1~~
Service Address 2	~~Service Address 2~~
Service City	~~Service City~~
Service State	~~Service State~~
Service Zip Code	~~Service Zip Code~~
Service Country	~~Service Country~~
Billing Address 1	~~Billing Address 1~~
Billing Address 2	~~Billing Address 2~~
Billing City	~~Billing City~~
Billing State	~~Billing State~~
Billing Zip Code	~~Billing Zip Code~~
Billing Country	~~Billing Country~~
Billing Note	~~Billing Note~~
Billing Name	~~Billing Name~~
Phones	~~Phones~~
Phones: Title	~~Phones: Title~~
E-Mail	~~E-Mail~~
Map Code	~~Map Code~~
Primary Contact Status	~~Primary Contact Status~~
All Contact Status	~~All Contact Status~~
Install Date	~~Install Date~~
Site Notes	~~Site Notes~~
Security Notes	~~Security Notes~~
Technician ID	~~Technician ID~~
Special Needs	~~Special Needs~~

Labor Discount %	~~Labor Discount %~~
Part Discount %	~~Part Discount %~~
Sales Tax Item	~~Sales Tax Item~~
Balance	~~Balance~~
Prepay Balance	~~Prepay Balance~~
Last Phone Date (mm/dd/yy)	~~Last Phone Date (mm/dd/yy)~~
Latitude	~~Latitude~~
Longitude	~~Longitude~~
Part Price Level	~~Part Price Level~~
QuickBooks Fullname	~~QuickBooks Fullname~~
Distance	~~Distance~~
Account Number	~~Account Number~~
Create Date	~~Create Date~~
Field Special Needs	~~Field Special Needs~~
Asset Name	~~Asset Name~~
Sales Rep	~~Sales Rep~~
Account Manager ID	~~Account Manager ID~~
Property Mgr. ID	~~Property Mgr. ID~~
Balance Age	~~Balance Age~~
Credit Limit	~~Credit Limit~~
QB Company	~~QB Company~~
Invoice Class	~~Invoice Class~~
User Defined Fields (UDF's)	To place UDF's into your emails, simply place the tildes (~~) around the name of the UDF you want to use. Please Note: If you have multiple UDF's with the same name, the email will pull the first name it finds. You may want to reconsider naming your UDF's unique names to avoid confusion

Job Contract Information	
Field Name	Code
Contract Name	~~Contract: Name~~
Contract Number	~~Contract: Number~~
Contract Package	~~Contract: Package~~
Contract Status	~~Contract: Status~~
Contract Start Date	~~Contract: Contract Start Date~~
Contract End Date	~~Contract: Contract End Date~~
Contract Value	~~Contract: Value~~
Contract Hours	~~Contract: Hours~~
Contract Note	~~Contract: Note~~

Contract PO	~~Contract: PO~~
Contract Servicex ID (x is the Service line number within the contract, starting at the top) (ex. Contract Service1 ID)	~~Contract: Servicex ID~~ (x is replaced with the corresponding Service line within the contract)
Contract Servicex Visits (ex. Contract Service1 Visits)	~~Contract: Servicex Visits~~
Contract Servicex Hours (ex. Contract Service1 Hours)	~~Contract: Servicex Hours~~
Contract Servicex Value (ex. Contract Service1 Value)	~~Contract: Servicex Value~~
Contract Servicex Visit Value (ex. Contract Service1 Visit Value)	~~Contract: Servicex Visit Value~~
Contract Servicex Note (ex. Contract Service1 Note)	~~Contract: Servicex Note~~

Work Order Information	
Field Name	Code
Work Order #	~~WO: Work Order #~~
Work Order Routing Order	~~WO: Routing Order~~
Work Order Changed By	~~WO: Changed By~~
Work Order Changed Date	~~WO: Changed Date~~
Work Order Created By	~~WO: Created By~~
Work Order Create Date	~~WO: Create Date~~
Work Order Problem (This refers to the Office Comments/Work Description)	~~WO: Problem~~
Work Order Field Comment	~~WO: Field Comment~~
Work Order Length	~~WO: Length~~
Work Order Pending Reason	~~WO: Pending Reason~~
Work Order PO Number	~~WO: PO Number~~
Work Order Priority	~~WO: Priority~~
Work Order Service ID	~~WO: Service ID~~
Work Order Category	~~WO: Work Category~~
Work Order Service Description	~~WO: Service Description~~
Work Order Status	~~WO: Status~~
Work Order Invoice Status	~~WO: Invoice Status~~
Work Order Tech ID	~~WO: Tech ID~~

Work Order Tech Name	~~WO: Tech Name~~
Work Order Proposed Date	~~WO: Proposed Date~~
Work Order Asset Name	~~WO: Asset Name~~
Work Order Invoice Number	~~WO: Invoice Number~~
Work Order Field Communications	~~WO: Field Communications~~
Work Order Contract Name	~~WO: Contract Name~~
Work Order Sales Rep	~~WO: Sales Rep~~
Work Order Price Override	~~WO: Price Override~~
Work Order Appt. Confirmed	~~WO: Appt. Confirmed~~

Work Order Time Options	
Field Name/Description	Code
Date and Time Scheduled (Numerical Value) (ex. 01/31/2014 10:11:12 AM)	~~WO: DateTime Scheduled~~
Full Date (Numerical Value) (ex. 11/28/2013)	~~WO: DATETIME DATE~~
Exact Time (ex. 10:11 AM)	~~WO: DATETIME TIME~~
Month (ex. November)	~~WO: DATETIME LONGMONTH~~
Month (Numerical Value) (ex. 11)	~~WO: DATETIME MONTH~~
Day of Week (ex. Monday)	~~WO: DATETIME LONGDAY~~
Date (Numerical Value) (ex. 28)	~~WO: DATETIME DAY~~
Year (Numerical Value) (ex. 2013)	~~WO: DATETIME YEAR~~
Hour (Numerical Value) (ex. 10)	~~WO: DATETIME HOUR~~

Minute (Numerical Value) (ex. 11)	~~WO: DATETIME MINUTE~~
Appointment Time AM/PM (ex. Before noon, in the afternoon, in the evening[set off after 5 pm])	~~WO: DATETIME AM/PM~~
Appointment Time EARLY/LATE Morning/Afternoon (ex. Early morning, late morning, early afternoon, late afternoon)	~~WO: DATETIME EARLY/LATE~~
Appointment Time 2 Hour Range (1 hour back, 1 hour ahead of schedule appt time) (ex. Scheduled at 10am will state Between 9:00 AM and 11:00 AM)	~~WO: DATETIME RANGE~~
Appointment Time 2 Hour Range w/ Lunch <i>Good if you keep your techs schedule clear during the lunch hour</i> (ex. Anything between 8 and 10 says 'between 8 and 10' Anything between 10 and 12 says 'between 10 and 12' Anything between 12 and 2 says 'between 12 and 2' Anything between 2 and 4 says 'between 2 and 4' Anything between 4 and 6 says 'between 4 and 6')	~~WO: DATETIME 2 HRS LUNCH~~
Appointment Time 2 Hour Range (If scheduled hour is: The display is: 8 or 9 8:00 to 10:00 10 or 11 10:00 to 12:00 12 or 1 12:00 to 2:00 2 or 3 2:00 to 4:00 Anything after 4pm 4:00 and after	~~WO: DATETIME 2 HRS~~

<p>Appointment Time 3 Hour Range (If the day starts at 7:00am If the scheduled hour is: The display is: 7 or 8 7:00 to 10:00 9 or 10 9:00 to 12:00 11 or 12 11:00 to 2:00 1 or 2 1:00 to 3:00 3 or 4 3:00 to 5:00 If the last calls range is greater than the end of the day, it will use the end of day hour minus 3 hours.)</p>	<p>~~WO: DATETIME 3 HRS~~</p>
<p>Appointment Time -1+2 (This will state the time as back one hour, forward two based on the hour the appointment is scheduled at.) (ex. Scheduled at 8am, email will show between 7 and 10 am)</p>	<p>~~WO: DATETIME -1+2~~</p>
<p>Appointment Time -1+3 (This will state the time as back one hour, forward three based on the hour the appointment is scheduled at.) (ex. Scheduled at 8am, email will show between 7 and 11 am)</p>	<p>~~WO: DATETIME -1+3~~</p>
<p>Appointment Time +1 (This will state the appt. time, plus one hour. If scheduled hour is 8:30, email will state between 8:30 and 9:30)</p>	<p>~~WO: DATETIME +1~~</p>
<p>Appointment Time +2 (This will state the appt. time, plus two hours. If scheduled hour is 8:30, email will state between 8:30 and 10:30)</p>	<p>~~WO: DATETIME +2~~</p>
<p>Appointment Time +3 (This will state the appt. time, plus three hours. If scheduled hour is 8:30, email will state between 8:30 and 11:30)</p>	<p>~~WO: DATETIME +3~~</p>
<p>Appointment Time +1 [Minutes not Included] (This will state the apt. time, plus one hour. If scheduled hour is anywhere in 9:00-9:59, email will state between 9 and 10)</p>	<p>~~WO: DATETIME +1HR~~</p>
<p>Appointment Time +2 [Minutes not Included] (This will state the apt. time, plus two hours.) (If scheduled hour is anywhere in 9:00-9:59, email will state between 9 and 11)</p>	<p>~~WO: DATETIME +2HR~~</p>

Appointment Time +3 [Minutes not Included] (This will state the apt. time, plus three hours. (If scheduled hour is anywhere in 9:00-9:59, email will state between 9 and 12)	~~WO: DATETIME +3HR~~
Appointment Time -1+2 [Minutes not Included] (This will state the time as back one hour, forward two, based on the apt. time.) (If scheduled hour is anywhere in 9:00-9:59, email will state between 8 and 11)	~~WO: DATETIME -1+2HR~~
Appointment Time -1+3 [Minutes not Included] (This will state the time as back one hour, forward three, based on the apt. time.) (If scheduled hour is anywhere in 9:00-9:59, email will state between 8 and 12)	~~WO: DATETIME -1+3HR~~
Allows you to set your own time range & what the range displays (in this example, anything scheduled between 6am-12pm displays Before Noon, anything scheduled between 12pm-9pm displays After Noon) [Anything scheduled outside of your start or end range time will return a blank display]	~~WO: DATETIME~6:00;12:00;Before Noon~12:00;20:00;After Noon~~
Work Order Completed Date (ex. 2/24/2015)	~~WO: Completed Date~~
Work Order Completed: Day of Week (ex. Tuesday)	~~WO: Completed LongDay~~
Work Order Completed: Time (ex. 9:15 AM)	~~WO: Completed Time~~
Work Order Completed: Month (ex. February)	~~WO: Completed LongMonth~~

Work Order Completed: Month (Numerical Value) (ex. 2)	~~WO: Completed Month~~
Work Order Completed: Day (Numerical Value) (ex. 24)	~~WO: Completed Day~~
Work Order Completed: Year (Numerical Value) (ex. 2015)	~~WO: Completed Year~~
Work Order Completed: Hour (Numerical Value) (ex. 9)	~~WO: Completed Hour~~
Work Order Completed: Minute (Numerical Value) (ex. 15)	~~WO: Completed Minute~~

Basic Company Information (Your Company)	
Field Name	Code
Registered Name	~~SW: Registered Name~~
Registered Address 1	~~SW: Registered Address1~~
Registered Address 2	~~SW: Registered Address2~~
Registered City	~~SW: Registered City~~
Registered State	~~SW: Registered State~~
Registered Zip	~~SW: Registered Zip~~
Registered Phone	~~SW: Registered Phone~~

Lawn Maintenance Report Fields (US Lawns Companies)	
Field Name	Code
LMR: Annual Beds Deadhead	~~LMR: Annual Beds Deadhead~~
LMR: Annual Beds Fertilized	~~LMR: Annual Beds Fertilized~~
LMR: Annual Beds Insecticide	~~LMR: Annual Beds Insecticide~~
LMR: Edging Debris Removal	~~LMR: Edging Debris Removal~~
LMR: Edging Pavement	~~LMR: Edging Pavement~~
LMR: Edging Plant Beds	~~LMR: Edging Plant Beds~~

LMR: Irrigation Advisory	~~LMR: Irrigation Advisory~~
LMR: Linetrim All	~~LMR: Linetrim All~~
LMR: Linetrim Selected Areas	~~LMR: Linetrim Selected Areas~~
LMR: Mow All Turf	~~LMR: Mow All Turf~~
LMR: Mow Blow Off Vacuum	~~LMR: Mow Blow Off Vacuum~~
LMR: Mow Selected Areas	~~LMR: Mow Selected Areas~~
LMR: Next Weeks Plans or Comments	~~LMR: Next Weeks Plans or Comments~~
LMR: Prune Clean Deadwood	~~LMR: Prune Clean Deadwood~~
LMR: Prune Hand Prune	~~LMR: Prune Hand Prune~~
LMR: Prune Shear	~~LMR: Prune Shear~~
LMR: Turf Notes	~~LMR: Turf Notes~~
LMR: Weed	~~LMR: Weed~~

Miscellaneous	
Option	Code
Confirm Appointment Link	~~Confirmy~~
Reschedule Appointment Link	~~Confirmn~~
Technician Picture	%%Techpic%%
Satisfaction Survey Link	%%Survey%%

Frequently Asked Questions

1. How much does HindSite Connect cost?

Answer: HindSite Connect will be billed at \$49.50 per month, per company for the Basic Package. HindSite Connect Pro will be billed at \$125.00 per month, per company.

2. Is there a start-up fee?

Answer: Yes. There is a start-up fee of \$250. This will include an hour and a half training session with your professor, setting up your templates, and training documentation and videos.

3. Can I use my SendGrid Account outside of HindSite?

Answer: Yes, if you want to use your account to send additional emails, you certainly may.

4. Can we view email statistics such as delivered, opened, unsubscribed, etc.?

Answer: Yes, this information can be found under the contact's history, as well as under the "Graph It!" section in your HindSite Connect Dashboard.

5. Will I also have to order SendGrid to use HindSite Connect or is that included in the fee?

Answer: Your SendGrid account is included in your HindSite Connect fee. Please do not sign up for your own SendGrid account if you plan to use HindSite Connect. We will create you your own account.

6. Will HindSite Connect work with my email provider (ex. Outlook, AOL, Gmail, Yahoo, etc.)?

Answer: We strongly recommend against using an email domain from free email services such as Yahoo, Gmail, AOL, etc. It can highly affect your deliverability, specifically for AOL and Yahoo. Both of these domains implement DMARC which means that if a message is sent using their domain as the from address that is not generated from one of their respective servers, their policy is to have the receiving domain reject the message. This is an attempt to stop people from spoofing these addresses.

An address with your domain as the from address (ex. @hindsitesoftware.com) is key.

7. Do we have the ability to send texts to our customers through HindSite Connect?

Answer: Sending text communication to your customers is not a possibility with HindSite Connect at this time. Development is currently researching Text Messaging options available.

8. Do we have the ability to send attachments with our emails?

Answer: Yes, you can include PDFs, Word Merge Docs and HindSite Assessments as attachments for individual work orders and mass emails.

9. Can I cancel/turn on and off my HindSite Connect account at any time?

Answer: You may cancel your account at any time. However, if you wish to reactivate your account in the future, you will be charged a restart up fee of \$250.00.

10. Can I switch packages at any time?

Answer: Yes, you may switch packages going both from a lower package status to a higher and vice versa at any time. It should be noted, however, that these packages are not prorated and you will need to pay for your package the rest of the month.

11. Can the customers unsubscribe from the emails?

Answer: Customers can unsubscribe from emails. To see who unsubscribed from your emails, you will need to check the contact's email address located under Phone/Email in the contact's information. The Phones: Title field will let you know if the customer's email address is unsubscribed or if the email bounced when attempting to send.

Customers who unsubscribe from your emails, mark your email as spam, or who return an email status of dropped or bounced will automatically be marked as unsubscribed by HindSite to protect your IP Address sending reputation.

The Default User for Connect Messages (set under GoTo Maint > Utilities > Application Setup > HS Connect) will also receive an internal HindSite Pink Message when an email address is unsubscribed or marked as bounced.

12. How do I know if an email was sent?

Answer: The contact's history stores information pertaining to any emails sent to the contact as well as the HindSite Connect Dashboard.

13. Is there a limit to the number of emails we can send at one time?

Answer: There is no limit to the number of emails you send at one time. It should be noted that the larger the number of emails being sent, the longer the time it could potentially take for all of the emails to reach all of the intended recipients.

14. Can we have more than one email address registered with our HindSite Connect account?

Answer: You may have as many email addresses associated with your HindSite Connect account as you wish. Each individual HindSite user can have their own Default From Email (set under GoTo Maint > Utilities > Menu Configuration > Users > More Options).

15. How do I check my IP Address reputation?

Answer: You can find your IP Address reputation under your Account Overview in SendGrid.

16. Where do I send HindSite Connect feedback and requests?

Answer: Please submit your feedback and requests via the HindSite program. In your HindSite, click Help and select HindSite Feedback. This will open the HindSite Feedback/Suggestions Forum. Select HindSite Connect and submit your request for other HindSite users to vote/comment on and to be reviewed with Development (quarterly).