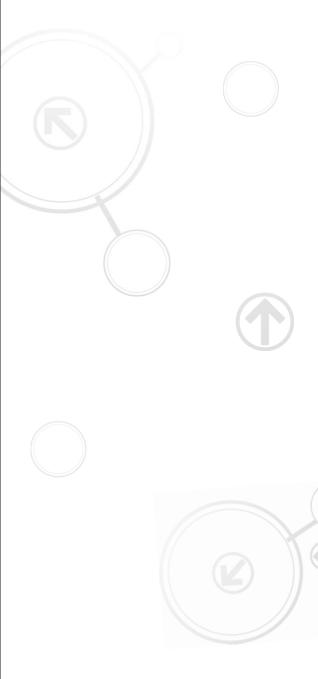
# HindSite Connect: Setting Up HindSite Connect Within HindSite

(Revised 3/2017)





HindSite Software| 888-752-5978 | Info@HindSiteSoftware.com | www.HindSiteSoftware.com



## Welcome to HindSite Connect!

With HindSite Connect, you can send the following 9 types of emails:

- 1. **Confirmation** This is an email you send immediately after scheduling an appointment.
- Reminder This is an email that you send a day or two in advance of your appointment, reminding your customer that you will be there soon.
- Reschedule If you reschedule an appointment, you can send a reschedule email that informs them of the new date and time of the appointment.
- 4. **Cancellation** If you cancel an appointment, this email notifies your customer that the appointment has been cancelled.
- Completion This is an email that is sent after an appointment is completed notifying your customer that the work order is completed.
- Incomplete These emails are sent for the work orders that have not been completed. They are great for informing the customer why the appointment was not completed and what the next steps are.
- 7. **Mass Send** These can be used to send information about appointments in a mass send format.
- 8. **Generic –** This is a one-off email. Its best use is as a blank email you can type a message in to that is specific to the customer.
- Contracts If you offer annual contracts to your customers, you can send out each customers' individual contract details through Job Contracts.

In our document titled <u>Setting Up Templates For</u> <u>HindSite Connect</u>, we walked you through how to create and edit the templates you'll use for these emails. In this document, we're going to show you how to setup and send these HindSite Connect emails.



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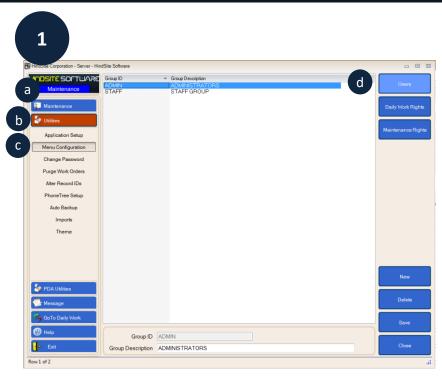




## **Getting Started**

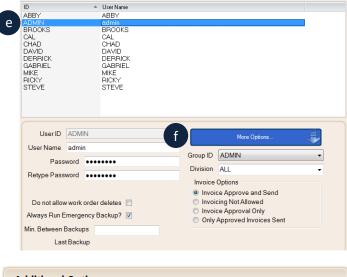
A few notes before you jump right in:

- Make sure you have the latest release of 0 HindSite. If not, update HindSite.
- If you have not agreed to our Connect 0 contract, please do so first. We cannot allow you access to HindSite Connect without agreeing to our terms.
- 1. You will first need to connect your SendGrid account to HindSite. You must do this under two ID's: ADMIN and your personal ID.
  - a. Click Go to Maintenance
  - b. Click Utilities.
  - c. Click Menu Configuration.
  - d. Click Users.



- Select ADMIN. e.
- f. **Click More Options**
- g. Enter your SendGrid User ID and Password
- h. Click Log In
- Enter the Default From Email (the i. email address you want your emails to send from)
- Enter the Default From Name to j. change the Sender Name of your emails (optional) Please Note: Any misspelling or mistyping of an email address could cause sending and replying issues with your emails. Please type carefully!

Repeat this process under each User who will be sending emails. For the Default From Email, enter the same email used for Admin or the User's own email address (up for you to decide).



ID

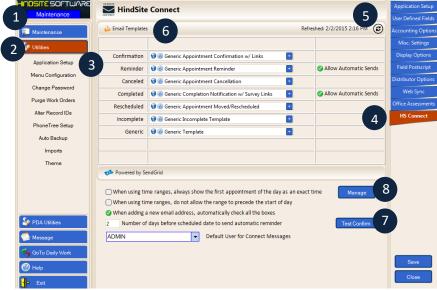
Additional C	ptions	
SendGrid —		
g User ID:	angela - demo	Log in to set Default
Password	••••••• Retype Pwd	Email Address
Default From	Email angelag@hindsitesoftware.com	
Default From		Log In h



## Setting Up Default Email Templates

Default templates are used when the individual services do not have templates set for them.

- 1. Click Go to Maintenance
- 2. Click Utilities
- 3. Click Application Setup
- 4. On the right side menu, select HS Connect
- 5. If you have added or made edits to your templates you will want to hit the refresh button. This will pull in any new changes to your templates from SendGrid.
- 6. For each of the email types, select a template to be set as the default.
- Test Confirm will have HindSite test your IP address to make sure your Web Sync settings are up to date and can accept the confirm/reschedule link clicks (Recommended testing before sending emails out live and after updating HindSite in the future)



- 8. The Manage button allows you to:
  - a. See which templates have bad HTML in them
    - If you see a red X next to the template name, you will want to review the template to ensure it does not contain incorrect codes or information
  - b. Decide which templates will be visible in the drop downs
  - c. Edit templates (*Please see note* on following page regarding editing templates within HindSite)





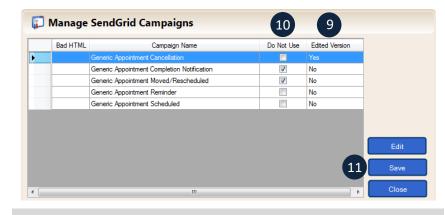
### Setting Up Default Email Templates Cont...

- d. An HTML editing screen will pop up.
- e. On the HTML editing screen, you have the ability to edit:
  - i. Font Type
  - ii. Font Size
  - iii. Font Style
  - iv. Font Color
  - v. Highlight Color
  - vi. Hyperlink/Image Insert
    - Please note: When inserting an image, it must be a website link (URL).
  - vii. Alignment of Text
  - viii. Numbered/Bulleted Lists
  - ix. Indentation of Text
- f. If you choose to not keep your changes, or would like the edited template to go back to the original version, click the Back To Original button
- g. Once finished, click Save.

\*\*Please Note: HindSite STRONGLY recommends editing your templates in SendGrid, not in HindSite. If you edit your templates in HindSite, your changes will NOT appear in SendGrid. When refreshing your templates, HindSite will not pull through changes made in SendGrid if the template has been edited in HindSite, so to not lose changes made in HindSite. To pull through your SendGrid templates again, set your template in HindSite as "Back To Original" (f).

- 9. To determine if a template has been edited, check the column titled Edited Version. Yes means it has been edited, No means it is the original email template created in SendGrid.
- 10. To not show a template in the template select drop downs, simply check the Do Not Use box.
- 11. Click Save when finished.



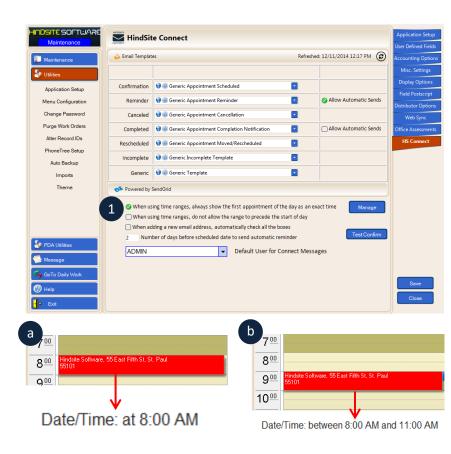




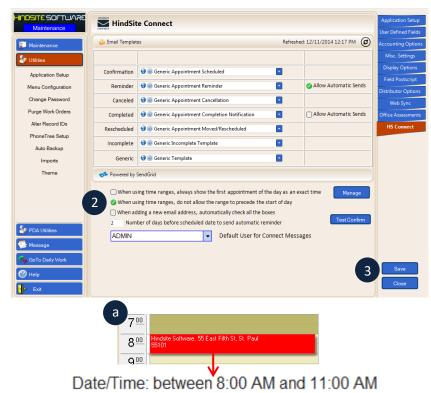
## Specifying Time Settings for Emails

You have some options when it comes to how times are displayed for your first appointment of the day:

- 1. When using time ranges, always show the first appointment of the day as an exact time
  - Your first appointment of the day's email will show the exact time it is scheduled (determined when an appointment is scheduled at exactly your start time)
  - All appointment emails following the first appointment of the day will be set to reflect the time range you have set up in your template for that service and type of email



- 2. When using time ranges, do not allow the range to precede the start of day
  - a. Your first appointment of the day will reflect the time ranges you have set in place in your email, however, they will not state a time before the beginning of your day.
- 3. Click Save when finished.





## Assigning Templates to Services

With HindSite Connect, you have the ability to assign certain email templates to certain services. By default, none of the services will be setup to send emails. You must set these up yourself.

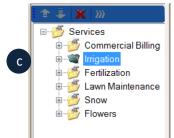
- 1. In your HindSite:
  - a. Select GoToMaint.
  - b. Select Services and Categories.
  - c. Click on the category you wish to set up templates for.
  - d. A button titled HindSite Connect Options will display to the right allowing you to determine the sending of emails for all of the services within that category. You have the option of:
    - Setting services to send emails
    - Setting services to not send emails

\*\*\*In this example, we are choosing to have every service within the Irrigation category send a confirmation, reminder, rescheduled, and cancelled email. We will not have emails send for completion emails.

Please note: You still have the ability to go in manually and check which emails you want to send for individual services. This is just a simpler way to mass select for all the services in a category.

- e. Click Update once you have made your selections.
- f. Click Save once finished



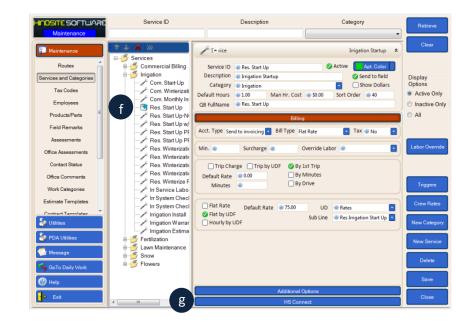


Servic	e Categories/Services	Clear
HindSite Con	nectOptions	Display Options
Confirmation	Set to Send	<ul> <li>Active Onl</li> <li>Inactive O</li> </ul>
Reminder	Set to Send	<ul> <li>All</li> </ul>
Canceled	Set to Send	
Completed	Do NOT Send	
Rescheduled	Set to Send	
Incomplete	Set to Send	
	Update	Labor Overri
		Triggers
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		New Servic
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# Assigning Templates to Services Cont...

- f. Open the service you wish to send emails for.
- g. On the bottom of the screen, select HS Connect.



- h. A list of email types will appear.
- i. If the email type has a "checked" box, it means that email will go out for that service.
- j. You will now need to select the template you wish to associate with the service. The drop down will list all of the email templates you have available. Note that if you want to use the default template (set up on the App Setup screen, pg. 4) for a service, you can leave this template field blank.
- k. Click Save.





#### **Contact Email Flags**

At some point, you will probably have a customer who no longer wishes to receive emails from you. You have the option to set specific customers and their emails to either receive or not receive your emails. To set this:

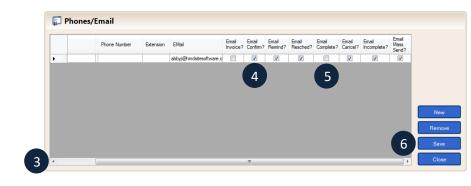
- 1. Open the contact you wish to adjust the email sending options for.
- 2. Click the Add/Remove button next to the Phone/Email.
- 3. Scroll over to see the options of emails that can be sent to the customer.
- 4. If the box is checked, the customer will receive those types of emails.
- 5. If the box is unchecked, the customer will not receive that type of email.
- 6. Click Save when you have made your changes.
- If you would like every new email address you enter into HindSite to have the boxes checked, check the box 'When adding a new email address, automatically check all the boxes' under Application Setup.

Please Note: If you would prefer to not have the boxes check automatically when adding a new email address, do not check this box. You will need to go in manually and check which emails you would like the new email address to receive.

📋 Daily Must Do	ID	First Name	Service Address 1	Service City	Map Code		Single Rows?
🝰 Contacts	HindSite Software	karl		St. Paul			Display
Open Contacts							Options Active
Spreadsheet Export							Inactive
Print Labels							Prospects Sold
Customer Times							All
MS Merge Import							Display Mgmt
Mass Schedule							Companies
Change Field 👻							History
Work Orders							Change ID
🐔 Reports							Pre-Payment
yub Systems							Schedule
i Message							New
🥱 GoTo Maint						1	Open
🕐 Help							Delete
- Exit	]						Close

Phone/E-Mail Primary Phone - 888-752-5978 E-Mail - abbyj@hindsitesoftware.com





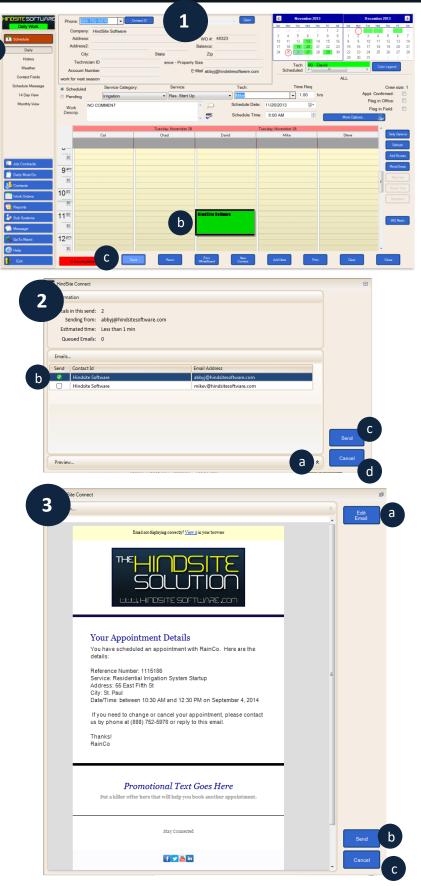




## Sending From the Daily Screen

Now that the templates are in place, it's time to start sending emails. A good portion of your sending will most likely be happening from the Daily screen.

- 1. To send a Confirmation email:
  - a. Click on Daily under the Schedule tab.
  - b. Schedule a customer as you normally would.
  - c. Click Save.
- 2. If you are sending an email to a contact with more than one email address, the HindSite Connect screen will appear.
  - a. The preview of the email can be seen by selecting the individual and clicking the pop up arrows in the lower right corner.
  - b. You can select whose email address of the contact should receive the email (A green check means they will receive the email, unchecked means they will not)
  - c. To send the email, click Send.
  - d. If you are not ready to send, click the Cancel button (You have the option to send the email later, Cancel simply stops it from being sent immediately).
- 3. If you are sending to a contact with only one email address, the preview screen will pop up automatically. You have two options:
  - Edit Email This allows you to change the text of an individual email without changing the template.
  - b. Click Send and the email will send immediately or
  - c. Click Cancel and the email will not be sent (You have the option to send the email later, Cancel simply stops it from being sent immediately).





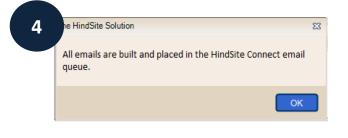
## Sending From the Daily Screen Cont...

- 4. If you click Send, a screen will pop up informing you that your emails are in the queue. This means the program is loading the templates and that the email is preparing to send. Click OK.
- 5. If you chose to send your confirmation email later, you may do so from your Daily screen.
  - a. Right click the work order
  - b. Select HS Connect
  - c. The option to send emails that are appropriate for that work order will appear.
  - d. Select Confirmation and your preview will reappear with the option to Send or Cancel (The preview can be seen on the previous page).
- 6. There are two ways to send Reminder emails: Manually and Automatically.

To send Reminder emails **manually**, you must select the day you wish to send reminders for from the calendar in the upper right corner of the Daily screen. You have the option of sending a reminder email manually one of two ways: From the schedule itself, or from Daily Options. You are only able to send individual reminder emails from the schedule screen. You can send multiple reminder emails from the Daily Options.

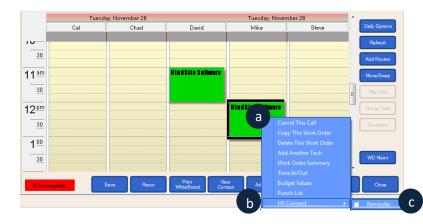
To send from the schedule itself:

- a. Right click the individual work order.
- b. Select HS Connect.
- c. Click on Reminder (A preview will pop up just like it did with the Confirmation email. You can choose to Send or Cancel from this pop up preview as well).



#### 





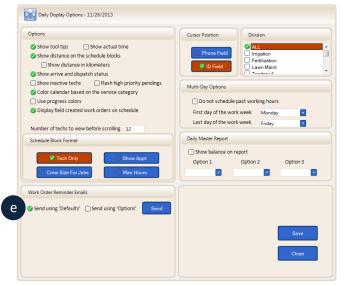


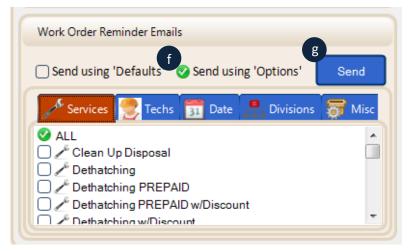
# Sending from Daily Options

To send from Daily Options:

- d. Click Daily Options. From here, you have two options:
- e. Send using 'Defaults'.
  - i. This option will send Reminders based on what you have set up previously under your Services and Categories/ Application Setup.
- f. Send using 'Options'. This will open up a selection of options to send Reminder emails by
  - Services Send Reminders based on Services for the day selected.
  - iii. Techs Send Reminders based on a tech.
  - iv. Date Select a date range to send Reminder emails for.
  - v. Divisions Select a division to have Reminder emails sent for.
  - vi. Misc. Will allow you to select a template you would like to send instead of the designated reminder template and also resend Reminder emails that have already been sent
- g. Click Send once you have made your selection.









#### **Automatic Reminders**

To allow reminder emails to send **automatically**:

- h. Click the GoToMaint tab
- i. Click Utilities
- j. Click Application Setup
- k. Select HS Connect
- I. Select a template for the Reminder email section (You also have the ability to set up Reminder emails by the services under Categories and Services)
- Mathematical methods in the method of the met
- n. Once that box is checked, you will have the ability to enter the number of days before the appointment you would like to send the Reminder email down below in the options.

#### Please Note: The number of days before cannot be less than 1 day (24 hours)

o. Click Save and your reminder emails will now go out automatically.

n

#### *Please Note: Here are a few disclaimers about automatic reminder emails:*

- *i.* Both the service and the contact must be set up to receive reminder emails automatically.
- *ii.* Automatic reminder emails will only send once for a work order. If the automatic reminder email has been sent and the work order is then rescheduled, another automatic reminder email **will not** be sent.
- *iii.* You can manually send the reminder email even if you have reminder emails set up to automatically send. The automatic reminder email will still send the desired number of days before even if you have manually sent a reminder beforehand.
- *IV.* For automatic reminders to work, one of your computers with HindSite installed needs to have the sleep settings set to "Never" (server machine is recommended).



🔒 Email Templat	ec Refrec	hed: 12/18/2014 2:18 PM 🕝	
		NEG. 12/10/2014 2.10 PW	Accounting Options
			Misc. Settings
Confirmation	😌 🛞 Generic Appointment Scheduled 💽		Display Options
Reminder	🞯 @ Generic Appointment Reminder	Allow Automatic Sends	Field Postscript
			Distributor Options
Canceled	🔮 🛞 Generic Appointment Cancellation 📃		Web Sync
Completed	😌 🛞 Generic Appointment Completion Notification 💽	Allow Automatic Sends	Office Assessments
Rescheduled	😌 🛞 Generic Appointment Moved/Rescheduled	k	HS Connect
Incomplete	😵 🛞 Generic Incomplete Template		
Generic	😧 🛞 Generic Template		
🔥 Powered by	SendGrid		
🕑 When using tim	e ranges, always show the first appointment of the day as an exact ti	me Manage	
🤣 When using tim	e ranges, do not allow the range to precede the start of day		
🐼 When adding a	new email address, automatically check all the boxes		
2 Number o	f days before scheduled date to send automatic reminder		
	rk, the sleep settings on your computer need to be set to "Never")	Test Confirm	
		Test Conlin	
ADMIN	Default User for Connect Messages		
			Save
			Close



# Sending From the Daily Screen Cont...

- 7. To send a Rescheduled appointment email:
  - a. Reschedule the appointment as you normally would.
  - b. Once you agree to the time/tech/or day changes, click Save.

			- C	ontact ID		Cjear	Novemb	er 2013	Decen	nber 2013
Daily Work	Corr Ad Addi	npany dress ress2 City hnician ID		State ance -	WO "N Balance Zip Property S		Tech	7 8 9 3 14 15 16	24 25 1 2 3 8 9 10 15 16 17	27 28 4 5 11 12 18 19 25 26 1 2 Color Le
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- c. A preview of the rescheduled email will pop up.
- d. Edit Email This allows you to change the text of an individual email without changing the template.
- e. Click Send if you are ready to send.
- f. If you click Cancel, the email will not send at this time.

g. You always have the option to right click the work order at a later time to send the email.

RCT .	set	
Preview	*	Edit Email
	Email not displaying concerly? <u>View is</u> in your browner	
	THE HINDSITE SOLUTION WWW. HINDSITE SOFTWARE.com	
	Your appointment has been rescheduled The following appointment has been rescheduled:	
	Reference Number: 1115186 Service: Residential Inigation System Startup Address: 55 East Fith St City: 51: Paul	
	Your appointment has been rescheduled for:	
	Date/Time: between 10:30 AM and 12:30 PM on September 27,	
	2014	
	If you need to change your appointment, please contact us by	
	phone at 888-123-4567 or reply to this email.	
	Thanks! RainCo	
	Promotional Text Goes Here Put a killer offer here that will help you book another appointment.	
	Put a killer offer here that will help you book another appointment. Stay Connected	Send
	Put a killer offer here that will help you book another appointment.	Send
	Put a killer offer here that will help you book another appointment. Stay Connected	
	Put a killer offer here that will help you book another appointment.  Stay Connected  Cancel This Call	
	Put a killer offer here that will help you book another appointment.  Saay Connected  Cancel This Call Copy This Work Order	
-	Put a killer offer here that will help you book another appointment.  Stay Connected  Cancel This Call	
-	Put a killer offer here that will help you book another appointment.  Saay Connected  Cancel This Call Copy This Work Order Delete This Work Order	
-	Put a killer offer here that will help you book another appointment.  Stay Connected  Cancel This Call Copy This Work Order Delete This Work Order Add Another Tech	
-	Put a killer offer here that will help you book another appointment.  Sizy Connected  Cancel This Call Capy This Work Order Delete This Work Order Add Another Tech Work Order Summary Time In/Out Budget Values	
-	Put a killer offer here that will help you book another appointment.	
-	Put a killer offer here that will help you book another appointment.  Sizy Connected  Cancel This Call Capy This Work Order Delete This Work Order Add Another Tech Work Order Summary Time In/Out Budget Values	



# Sending From the Daily Screen Cont...

- 8. To send a Cancelled appointment email:
  - a. Cancel the appointment as you normally would.
  - b. After you click Yes for the pop up asking 'Do you really want to cancel this Work Order?', and fill in the information about who is cancelling the work order and why, your preview pop up will appear.

- c. A preview of the cancellation email will pop up.
- d. Edit Email This allows you to change the text of an individual email without changing the template.
- e. Click Send if you are ready to send.
- f. If you click Cancel, the email will not send at this time.

g. You always have the option to right click the work order at a later time to send the email.



D

g



# Completion Emails (Automatic)

9. There are two ways to send work order Completion emails: **Automatically** and **Manually**.

9

#### Please Note: Field created work orders follow a different process when it comes to completion emails. Please see page 19 for this process.

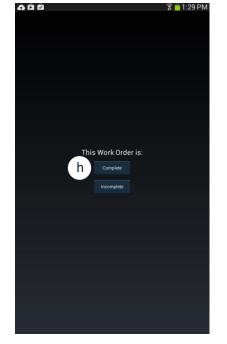
To allow completion emails to **automatically** send:

- a. Click the GoToMaint tab
- b. Click Utilities
- c. Click Application Setup
- d. Select HS Connect
- e. Select a template for the Completed email section (You also have the ability to set up Completion emails by services under Categories and Services)
- f. Next to the Default Completed Email Template, check the 'Allow Automatic Sends' box.
- g. Click Save.

In the field...

- h. Complete the work order
- i. Once your tech web syncs to the office, the completion email will be sent.









Refreshed: 12/11/2014 12:17 PM

# Completion Emails (Manual)

10. To send completion emails manually:

- a. Follow steps 9a-e
- b. Next to the Default Completed Email Template, uncheck the 'Allow Automatic Sends' box.

10

c. Click Save.

In the field... (For images refer to page 17)

- d. Complete the work order
- e. Have your tech sync to the office.

#### Back in the office...

- f. Right click the completed work order
- g. Select HS Connect
- h. Click on Completion



- i. A preview of the email will appear.
- Edit Email This allows you to change the text of an individual email without changing the template.
- k. Click Send if you are ready to send.
- I. If you click Cancel, the email will not send at this time.

You may repeat processes f-j to resend a completion email at any time.

	HS Connect	<u> </u>	Completior
HindSite Cor	mect		மி
Preview		*	Edit
		^	Email
	Email not displaying concerly? <u>New it</u> in your between		
	Your Appointment Is Completed! The following service has been completed by one of		
	our technicians. Here are the details:		
	Reference Number: 1115186 Service: Residential Irrigation System Startup	E	
	Address: 55 East Fifth St		
	City: St. Paul Completed at: 9/4/2014 4:04 PM		
	If you have any questions about your appointment,		
	please contact us by phone at 888-123-4567 or reply to this email.		
	Thanks!		
	RainCo		
	Promotional Text Goes Here		
	Put a killer offer here that will help you book another appointment.		-
			k k
	Stay Connected		Send
		Ţ	Cancel



### Completion Emails (Field Created Work Orders)

The automatic sending of **field created** work order completion emails is dependent on your settings within HindSite.

- 11. To automatically send field created work order completion emails:
  - a. Click Go To Maint
  - b. Click Utilities
  - c. Select Application Setup
  - d. Under Misc., uncheck the box next to 'Field Created WO Req. Office App.' This will allow field created work order completion emails to send as soon as the tech completes the work order and web syncs.

If you check this box, the completion email will be sent once the office imports the field created work order.

- e. Click Save.
- f. Note: No completion emails will send automatically unless you've checked the box stating you want completion emails to send automatically.



		ned: 12/11/2014 12:17 PM 🕝	Accounting Op
			Misc. Settin
Confirmation	😌 🛞 Generic Appointment Scheduled		Display Optic
Reminder	😌 🛞 Generic Appointment Reminder	Allow Automatic Sends	Field Postsci Distributor Op
Canceled	😵 🛞 Generic Appointment Cancellation 💽		Web Sync
Completed	😪 🛞 Generic Appointment Completion Notification	Allow Automatic Sends	Office Assessn
Rescheduled	🐨 @ Generic Appointment Moved/Rescheduled	f	HS Connec
Incomplete	😵 🛞 Generic Incomplete Template		
Generic	😌 🛞 Generic Template		
Powered by	SendGrid		
/hen using tir	ne ranges, always show the first appointment of the day as an exact ti	me Manage	
/hen using tir	ne ranges, do not allow the range to precede the start of day		
/hen adding a	new email address, automatically check all the boxes		
Number	f days before scheduled date to send automatic reminder		
For this to we	rk, the sleep settings on your computer need to be set to "Never")	Test Confirm	
ADMIN	✓ Default User for Connect Messages		



#### Incomplete Work Order Emails

12. To send an incomplete email:

- a. Go to Work Orders
- b. Click Incomplete
- c. Select the work order you would like to email
- d. Click the HS Connect button

JFTWAR	Emailed	DateTime Scheduled	Work Order	Customer ID	Customer Name	Address	Ziţ ^	Print
Work	Yes	4/1/2014 11:30 AM	1115136	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	- min
any work	No	4/2/2014 1:00 PM	1115150	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
	No	4/8/2014 11:30 AM	1115129	Hind: ware	Abby Jakacki	55 East Fifth St, St. P	551	Refresh
📆 Schedule	No	4/9/2014 1:00 PM	1115159	Hin C re	Abby Jakacki	55 East Fifth St, St. P	551	
	No	4/18/2014 1:00 PM	1115156	Hir C re	Abby Jakacki	55 East Fifth St, St. P	551	
Job Contracts	No	4/19/2014 1:00 PM	1115160	Hinds. Mare	Abby Jakacki	55 East Fifth St, St. P	551	Show
4 <b>-</b>	No	4/30/2014 12:00 PM	1115157	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551 =	Incomplete
	No	5/1/2014 10:30 AM	1115165	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	for Today
Snow Manager	No	5/31/2014 12:00 PM	1115169	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	for roday
4	No	6/7/2014 2:00 PM	1115172	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
🧾 Daily Must Do	No	6/12/2014 1:30 PM	1115173	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
	No	6/25/2014 12:00 PM	1115174	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
🙈 Contacts	No	7/22/2014 1:00 PM	1115175	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
	No	8/20/2014 1:00 PM	1115177	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
Work Orders	No	8/30/2014 12:00 PM	1115179	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
Work Orders	No	9/2/2014 1:00 PM	1115182	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
	No	9/3/2014 12:30 PM	1115185	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
Work Order	No	9/5/2014 12:30 PM	1115187	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
Maintenance	No	9/25/2014 12:00 PM	1115183	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
Pending	No	9/26/2014 1:00 PM	1115190	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
Pending	No	9/30/2014 12:00 PM	1115184	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
Incomplete	No	10/6/2014 11:00 AM	1115197	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
incomplete	No	10/22/2014 2:00 PM	1115195	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551	
Recurring	No	10/23/2014 12:30 PM	1115193	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551	
recorning	No	10/28/2014 11:30 AM	1115191	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551	
Admin Times	No	10/30/2014 12:00 PM	1115202	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551	
<b>*</b> -	No	10/31/2014 1:00 PM	1115192	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P		
🍖 Reports	No	11/8/2014 1:00 PM	1115203	Hindsite Software	Abby Jakacki	55 East Fifth St. St. I	`	HS Connect
	No	11/26/2014 11:30 AM	1115209	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	d	no connec
🚽 Sub Systems	No	11/27/2014 1:00 PM	1115207	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	<u> </u>	
	No	11/28/2014 11:00 AM	1115205	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551	ReSchedule
Dashboard	No	11/29/2014 12:00 PM	1115208	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551	
Subasiluoaru	No	12/13/2014 12:00 PM	1115211	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551	
	No	12/17/2014 11:00 AM	1115213	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551	History
🍉 Message	No	7/16/2013 9:31 AM	1114897	Crary, David	David Crarv	1234 Johnson St., Mi	551	_
	No	7/25/2013 5:00 PM	1115049	Test Company	Jane Goodnone	1234 Big House Lane	551	WO Maint
🔦 GoTo Maint	No	7/26/2013 2:00 PM	1115055	Test Company	Jane Goodnone	1234 Big House Lane	551	WOMann
	No	7/29/2013 8:00 AM	1115048	Test Company	Jane Goodnone	1234 Big House Lane	551	
🕜 Help	No	8/1/2013 8:00 AM	1115057	Test Company	Jane Goodhone	1234 Big House Lane	551	Delete
- rielp	No	8/5/2013 8:00 AM	1115058	Test Company	Jane Goodnone	1234 Big House Lane	551	
<b>n</b>	No	8/6/2013 3:00 PM	1115060	Test Company	Jane Goodnone	1234 Big House Lane	551 -	
• Exit	1	UI U			1211 2 2004 1010			Close

- e. A preview of the email will pop up
- f. This would be a good place to edit the email and fill in the reason the work order was incomplete. Click Save if you do edit the email.
- g. Click Send

 h. To review which emails have been sent, and which still need to be contacted, use the Emailed column. Yes means an incomplete email has been sent for that work order. No means no incomplete emails were sent for the work order.

Please Note: Incomplete emails can also be sent by right clicking the work order on the Daily screen and selecting HS Connect.

# HidSite Connect Preview... **FigURE Solution FigURE Solution** <

h

Emailed	DateTime Scheduled	Work Order	Customer ID	Customer Name	Address	Ziţ 4
Yes	4/1/2014 11:30 AM	1115136	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551
No	4/2/2014 1:00 PM	1115150	Hindsite Software	Abby Jakacki	55 East Fifth St, St. P	551



#### Mass Email Sends (Work Order Maintenance)

Mass email sends can be used to contact a large number of clients with work orders at once.

- 1. Select Work Order Maintenance located under Work Orders
- 2. Use your search fields to generate a list you would like to send to.
- 3. Select HS Connect. A pop up will appear asking you to select a template.
- 4. Select the template you would like to send to your list (For instructions on including Attachments and Assessments, please go to Page 39)
- 5. Click Review

6	۸	non	un	will	annoar	with
о.	А	pop	up	WIII	appear	with:

- a. How many emails will be sent, who the emails will come from, how long the mass send should take, and how many emails are in your Queue
- b. A list of the contacts that will receive the email
- c. The ability to not send the email to some of the email addresses in the list
- d. The ability to pop up a preview of the email
- e. The ability to send the emails
- f. The ability to cancel this mass send

Please Note: If a contact is listed multiples times from past work orders, HindSite will not send duplicate emails to the same email address if the information within the email is the same. For example, if you do NOT have work order-specific information in your template, HindSite will only send one email to each email address on the list. If you DO have work order-specific information in your template, HindSite will send an email for every work order on the list. In this case, a customer could receive multiple emails.

INDSITE SOFTWARE	1st Search	Field	2nd Sear	ch Field	31	rd Search Field	ł	4th Search Field	Retrieve
Daily Work	First Name	•	Contact ID	•	WO: St	tatus	- V	VO: Work Order #	•
觉 Schedule	Like	•	Like	-			L	ike	Clear
Job Contracts			%HindSite				•		Report
Snow Manager								3 HS Connec	t Chg. Col:
Sata Onow Manager	WD: Work Order #	W0: DateTi	me Scheduled	Contact ID		WD: Tech ID	WD: State	us w0: Invoice Status	
Daily Must Do	1115093	1/30/2014	12:00:00 PM	Hindsite Sc	ftware	Sales	Incompl	ete No	Single R
	1115095	1/3/20141	:00:00 PM	Hindsite Sc	ftware	Crew#1	Incompl	ete No	
	1115096	1/28/2014	10:00:00 AM	Hindsite So	ftware	Crew#1	Incompl	ete No	
- Contacto	1115097	1/24/2014	12:00:00 PM	Hindsite So	ftware	Crew #1	Complet		=
Work Orders	1115098	1/7/20141	2:00:00 PM	Hindsite So		Crew #1	Incompl	ete No	
Work Orders	1115099	1/8/20141		Hindsite Sc		Sales	Incompl		Print
Work Order	1115100		1:00:00 AM	Hindsite Sc		Crew#1	Incompl		
Maintenance	1115101		11:00:00 AM	Hindsite So		Sales	Incompl		
	1115102		9:00:00 AM	Hindsite So		Crew #1	Cancele		Recur
Pending	1115104		3:00:00 PM	Hindsite So		Sales	Incompl		
	1115105		1:00:00 PM	Hindsite So		Sales	Incompl		Contact In
Incomplete	1115106		2:00:00 PM	Hindsite Sc		Crew#1	Incompl		Contact in
Recurring	1115107		2:00:00 PM	Hindsite Sc		Crew#1	Cancele		
Recurring	1115108		1:00:00 PM	Hindsite Sc		Sales	Incompl		Summar
Admin Times	1115109		2:46:00 PM	Hindsite So		Crew#1	Incompl		
	1115110		1:00:00 AM	Hindsite Sc		Crew #1	Incompl		
📢 Reports	1115111		12:00:00 PM	Hindsite Sc		Crew #1	Incompl		Materials
£	1115112		10:00:00 AM	Hindsite Sc		Crew#1	Incompl		
🚀 Sub Systems	1115113		1:23:00 PM	Hindsite Sc		Crew #1	Incompl		Times
	1115114		1:00:00 PM	Hindsite Sc		Crew#1	Incompl		- Innes
🔆 Dashboard	1115115		2:00:00 PM	Hindsite Sc		Crew#1	Cancele		
<u> </u>	1115116	2/4/20141		Hindsite Sc		Crew #1	Incompl		New
🚭 Message	1115117		11:00:00 AM	Hindsite Sc		Crew#1	Cancele		
- moodage	1115118		1:00:00 PM	Hindsite Sc		Crew#1	Incompl		0
🔦 GoTo Maint	1115119		11:00:00 AM	Hindsite Sc		Sales	Incompl		Open
Goromant	1115120		12:00:00 PM	Hindsite Sc		Crew#1	Cancele		
(2) Help	1115121		12:00:00 PM	Hindsite So		Crew#1	Incompl		Delete
() нер	1115122		8:00:00 AM	Hindsite Sc		Sales	Incompl		
	1115123		12:00:00 PM	Hindsite Sc		Crew #1	Incompl		-
• Exit	1115124	12/19/20114	1-00-00 PM	Hindsite Sc	mware	Sales	Incompl	ete No	Close

	3	HS Con	nect	Building relationships is what we d
		CONNECT		
				t. This template will be used in the email th valid email addresses will send.
		4 Template	Generic Mass Send - Cold	Weather Alert
		Attachment [		Browse
		Assessment		
				5
				Review Cancel
				Calicer
			6	
HindS	ite Connect			
Inform	ation			
Totals	in this send:	200	-	
Se	ending from:	abbyj@hindsitesoftv	vare.com a	
Esti	mated time:	16 mins		
Qu	eued Emails:	0		
Emails.			b	
Send	WO#	Scheduled	Contact ID	Email Address
<b>?</b>	1115093	2014-01-30 12:00:00 F	'M Hindsite Software	abbyj@hindsitesoftware.com
0	1115093	2014-01-30 12:00:00 F	M Hindsite Software	mikev@hindsitesoftware.com
0	1115095	2014-01-03 1:00:00 PM	M Hindsite Software	abbyj@hindsitesoftware.com
<b>Ø</b>	1115095	2014-01-03 1:00:00 PM	M Hindsite Software	mikev@hindsitesoftware.com
	1115096	2014-01-28 10:00:00 A	M Hindsite Software	abbyj@hindsitesoftware.com
0	1115050		M Hindsite Software	mikev@hindsitesoftware.com
<ul><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li></ul>	1115096	2014-01-28 10:00:00 A	in and see southare	
· ·		2014-01-28 10:00:00 A 2014-01-24 12:00:00 P		abbyj@hindsitesoftware.com
0	1115096		M Hindsite Software	abbyj@hindsitesoftware.com mikev@hindsitesoftware.com
0 0	1115096 1115097	2014-01-24 12:00:00 F	M Hindsite Software M Hindsite Software	
0 0 0	1115096 1115097 1115097 1115098	2014-01-24 12:00:00 F 2014-01-24 12:00:00 F	M Hindsite Software M Hindsite Software	mikev@hindsitesoftware.com



4th Search Field

4th Sort Field

Single Rows

Auto Refresh

Proposed dates less than or equal to: 11/30/2014 -

- Like

•

WD: Proposed Date WD: Pending Reason

3rd Search Field

3rd Sort Field

•

.

#### Mass Email Sends (Pending Work Orders)

Mass email sends can be used to contact a large number of pending work orders at once. Here is how:

- 1. Select Work Orders
- 2. Select Pending in the Work Orders menu
- 3. Use your search fields to generate a list you would like to send to.
- 4. Select HS Connect. A pop up will appear asking you to select a template.
- 5. Select the template you would like to send to your list.
- 6. Click Review

			LOW	ADAMIS CASE I	0/16/6013	rie-ocileutieu	
		1114717	Low	ADAMS CASEY	8/19/2013	Pre-Scheduled	
		<		m		•	
4	HEDSITE						
<u> </u>		HS Con	nect		Building relationship	s is what we do.	
	CONNECT						
	Sele	ect a templat	te from th	ne drop down list.	This template will be u	sed in the emails	
					valid email addresses v		
		ocing se	inc. Only	the contacts with	valia cintali addi cisci v	in sena.	
	5						
	5	Template	Generic M	ass Send - Cold Wea	ather Alert 🔄 💽		
	Att	tachment				Browse	
						Diowse	
	As	sessment			-		
					6		
					Review	Cancel	

RainCo - HindSite Software - Schedu

Work Orde Maintenanc

Pendin

Recurring

Row 1 of 34

ITE SOFTWARE

3

WO: DateTime Schedule + WO: DateTime Schedule +

▼ <</p>

III 8/2014

1st Search Field

1st Sort Field

WD: Work Order WD: Priority Contact ID

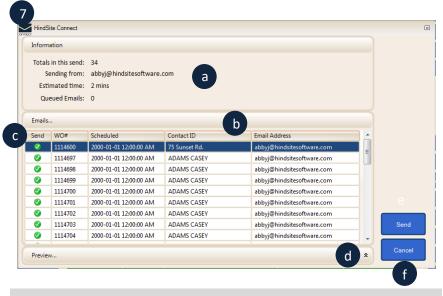
<

10/ 1/2014

2nd Search Field

2nd Sort Field

- 7. A pop up will appear with:
  - a. How many emails will be sent, who the emails will come from, how long the mass send should take, and how many emails are in your Queue
  - b. A list of the contacts that will receive the email
  - c. The ability to not send the email to some of the email addresses in the list
  - d. The ability to pop up a preview of the email
  - e. The ability to send the emails
  - f. The ability to cancel this mass send





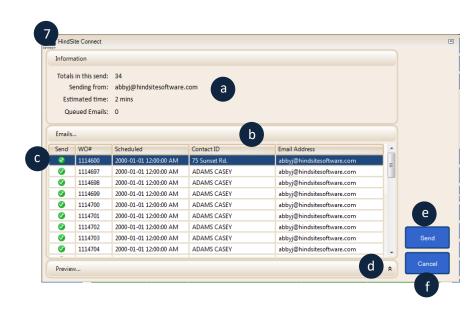
#### Mass Email Sends (Contracts)

Mass email sends can be used to contact a large number of contacts with contracts at once. Here is how:

- 1. Select Job Contracts
- 2. Select Contracts in the Job Contracts menu
- Use your search fields to generate a list you would like to send to
- Select HS Connect. A pop up will appear asking you to select a template
- Select the template you would like to send to your list (for instructions on sending attachments, jump to page 36)
- 6. Click Review
- 7. A pop up will appear with:
  - a. How many emails will be sent, who the emails will come from, how long the mass send should take, and how many emails are in your Queue
  - b. A list of the contacts that will receive the email
  - c. The ability to not send the email to some of the email addresses in the list
  - d. The ability to pop up a preview of the email
  - e. The ability to send the emails
  - f. The ability to cancel this mass send

RainCo - The HindSite Solution				-					2
HINDSITE SOFTWARE	1st Search Fie	ld	2nd Search Field		3rd Sear	ch Field	4th	Search Field	Retrieve
Daily Work	Contact ID	•	CONTRACTS: Status	•		•		•	Clear
觉 Schedule	Like	•			Like	-	Like	•	
Job Contracts	%Н		Accepted	•					MS Merge
Contracts 2	Contact ID Hindsite Software	CONTR4	CTS: Contract Name	CON	ITRACTS: User	CONTRACTS: Accepted	Status	CONTRACTS: Creater	Chg. Cols.
Monthly View	i finasile doliwere	mston				Accepted		ADMIN	
Mass Schedule									Current Only
Validate Contracts									All Jobs
Snow Manager									
Contacts Work Orders									
Sub Systems								4	HS Connect Schedule
Dashboard									New
Message									New
Message GoTo Maint									
🥌 Message	4		11						New Open

4 HS Cor	nnect Building relationships is what we do.
	late from the drop down list. This template will be used in the emails
being 5 Template	sent. Only the contacts with valid email addresses will send. Generic Annual Contract Details
Attachment	K:\Angela's Stuff\2017 Contract Packages.docx Browse
Assessment	
	6 Review Cancel





#### **Generic Email Sends**

Generic emails are one-off emails that can be sent to customers. These are convenient if you need to inform the customer of a quick note or last minute information.

#### \*\*Please Note: The Generic emails are tied to the Email Mass Send check box located under the contact's phone/email.

EMail	Email Invoice?	Email Confirm?	Email Remind?	Email Resched?	Email Complete?	Email Cancel?	Email Incomplete?	Email Mass Send?
abbyj@hindsitesoftware.c		V	1	<b>V</b>	<b>V</b>	1	<b>V</b>	

To send the Generic Email, go to the scheduling screen:

1. Select a template for the Generic Email Template on the Application Setup screen

Please Note: We recommend this be a blank email template with your logo located at top to make it easier to type in the message you want the email to include. We also recommend you keep the subject blank when you create this generic template in SendGrid. The subject should change with each email you send if you are truly sending them as oneoffs, and you can edit the subject right before sending in HindSite if you leave it blank in SendGrid (See Pg. 36 for details).

- 2. Go to the Daily screen located under the Schedule tab
- 3. Right click the work order you would like to send a generic email to, select HS Connect, and select Generic
- 4. Click the Edit Email Button located in the top right corner of the preview

Confirmation	😌 🛞 Generic Appointment Scheduled	•	
Reminder	😵 🛞 Generic Appointment Reminder	•	Allow Automatic Send
Canceled	😵 🛞 Generic Appointment Cancellation	•	
Completed	😵 🛞 Generic Appointment Completion Notification	-	Allow Automatic Sene
Rescheduled	😵 🛞 Generic Appointment Moved/Rescheduled	-	
Incomplete	😌 🛞 Generic Incomplete Template	-	
1 Generic	🞯 🛞 Generic Template		







#### Generic Email Sends Cont...

- 5. Here you will be able to type in the specific message you'd like your email to say
- 6. Click Save when finished typing your message and Send to deliver your email.

Please Note: The save does not save this as a new template. It simply allows it to send once with the message you typed in.

HindSite Connect	0
Preview	Back To Original
5 There has been a change to the field technician that will be visting your property today. Tom will be your technician instead of Bill. We will see you soon! Have a great day!	
6 Stay Connected	Save Close



#### Emails Sent via Contact History

Want to view emails that have been sent to a contact? This can be done quickly from the contact's history screen.

Open up your contact's information:
 a. Click History

- b. The Contact's History will contain:
  - 1. The Type
  - 2. The Work Order associated with the email
  - If the email was sent out of HindSite to the email server
  - 4. The Date and Time the email was sent
  - 5. The type of email that was sent (Confirmation, reminder, rescheduled, cancellation, completion, incomplete, or mass scheduled)
  - 6. Which user sent the email
  - 7. Which email address sent the email
  - 8. Which email address the email was sent to
  - The status of the email after it was sent out of the email server. (Please see Pages 27-29 for more information on these)

You also have the ability to double click the history record to have a preview of the exact email sent pop up.

	Needs	
Customer ID Hindsi	e Software	More
<ul> <li>First Abby</li> </ul>	Last Jakacki Contact	a History
Active Status	Company Hindsite Software	Relationship
(A)ctive		Attached File
Owner Service	e Address To Clipboard Copy -> Bill DEFAULT  Add/Remo	ove
Mgmt. Co. Addre	55 East Fifth St 55 East Fifth St	Add Note
Mgmt. Prop. Address	2	E-Mail
Co.and Prop.	ty St. Paul 🔹 St. Paul	Send to QB
Customer Sta	te MN - O Zip 55101 - MN Zip 55101	Map It
Prospect Coun	ry	Punch List
Add/Remove Phone/E-M	il Primary Phone - 952-555-1212 E-Mail - abbyj@hindsitesoftware.com ▼ Add/Remo	Discounts
Division ALL	Map Code     Install Date     1/ 1/2000	Maint Billing
Price Level	Inv. Class     Tech ID	
Tax Non	Acct. Number     Acct. Mgr.	Assets
Security Notes		Estimates
Site Notes	A	ABC Property Mg
	Ψ	Overrides
Special Needs		Measure
Field Special Needs		ABC
QB Company	✓ Sales Rep	
QB Fullname		Print
	Longitude -93.092855 Credit Limit	

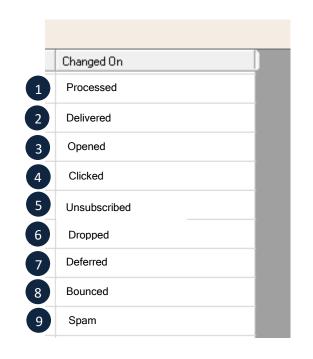
	E Hindsite S	Software						Work Orders	Start history from: End history on:	1/ 1/2000	Refre
Type	WD	Status	Date/Time	Service	By	Office Commerk	Field Remark	Created Br		Changed By	
wo	1115109	Not Started	2/28/2014 2:46 PM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/15/2014 14:46		
wo	1115112	Not Started	2/14/2014 10:00 AM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/24/2014 14:15		
wo	1115110	Not Started	2/1/2014 11:00 AM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/20/2014 09:25		
wo	1115101	Not Started	1/31/2014 11:00 AM	Res. Startup	Sales	NO COMMENT		ADMIN	1/10/2014 14:37		
						Work Order 1115107 Canceled					
wo	1115107	Canceled	1/30/2014 2:00 PM	Res. Startup	Crew #1	Canceled Requested By: as		ADMIN	1/15/2014 14:03	ADMIN	1/15/2014 14:08
						- User: ADMIN - NO COMMENT					
wo	1115093	Not Started	1/30/2014 12:00 PM	Res. Startup	Sales	NO COMMENT		ADMIN	1/2/2014 10:40	ADMIN	1/2/2014 10:40
wo	1115105	Not Started	1/29/2014 1:00 PM	Res. Startup	Sales	NO COMMENT		ADMIN	1/15/2014 13:04	ADMIN	1/15/2014 13:06
wū	1115108	Not Started	1/28/2014 1:00 PM	Res. Startup	Sales	NO COMMENT		ADMIN	1/15/2014 14:44		
wo	1115096	Not Started	1/28/2014 10:00 AM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/3/2014 14:58		
Enal	1115112	Sent	1/24/2014 2:16 PM	Reminder	ADMIN	Sent from: abby@hindsitesoftware.com	Sent to: abby@hindsitesoftwa		1/24/2014 14:16		
Enal	1115112	Sent	1/24/2014 2:15 PM	Confirmation	ADMIN	Sent from: abby@hindsitesoftware.com	Sent to: abbyi@hindsitesoftwi	are.com ADMIN	1/24/2014 14:15		
wo	1115097	Completed 0 man hrs. 1/16/2014	1/24/2014 12:00 PM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/3/2014 15:01	ADMIN	1/16/2014 15:14
wo	1115111	Incomplete 0 man	1/23/2014 12:00 PM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/23/2014 11:33	ADMIN	1/23/2014 15:53
		Pres.				Work Order 1115107 Canceled					
Note			1/15/2014 2:09 PM		ADMIN	Requested By: as		ADMIN	1/15/2014 14:09		1/1/1900 00:00
		incomplete.				- User: ADMIN					
wo	1115106	Incomplete 0 man hrs.	1/15/2014 2:00 PM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/15/2014 14:01		
wo	1115104	Incomplete 0 man	1/14/2014 3:00 PM	Res. Startup	Sales	NO COMMENT		ADMIN	1/14/2014 13:12	ADMIN	1/14/2014 13:39
		hrs.				Work Order 1115182					
\$y										Prin	it Clos
			2			3	_ (	4	17.	Prin	nt Clos
	ie		2	WO		3 Status			e/Time	Prin	nt Clos
میں Typ Emai								Dati	e/Time 1/2014 2:		
Typ Emai	il			W0 1115112 6		Status		Dati 1/24	/2014 2:		
1 Typ Emai	il			WO 1115112		Status		Date 1/24 Office 0	./2014 2: Comment		
Typ Emai	il :e			W0 1115112 6 B		Status		Date 1/24 Office 0 Sent from	./2014 2: Comment	:16 Ph	М
Typ Emai Servic Remino	il :e der	emarl		W0 1115112 6 B	y	Status Sent	anged I	Date 1/24 Office ( Sent from abbyi@l	2014 2: Comment	:16 Ph	M
Typ Emai Servic Remino	il :e der			W0 1115112 6 B	y	Status Sent	hanged	Date 1/24 Office ( Sent from abbyi@l	2014 2: Comment	:16 Ph	М



#### **Email Statuses**

There are a number of statuses that an email can have once it is sent from the email server to the contact. HindSite Connect waits 3 hours before checking the status of a sent email. After the initial check after 3 hours, it will check each email sent every 12 hours for 7 days. Here are the statuses found under the 'Changed On' column located under the contact's history and what they mean:

- Processed The email has been sent to the email server. This means it had no issues leaving HindSite and making it to SendGrid to be sent.
- 2. Delivered The email has been delivered to the contact's email server.
- Opened The contact has opened your email.
- 4. Clicked The contact has clicked a link within your email.
- Unsubscribed The contact has clicked the unsubscribe link within your email. The contact will no longer receive your emails.
- Dropped You tried to send an email after a customer clicked the unsubscribe link or marked you as spam. The contact did not receive the email with this status.
- Deferred The contact's email server was not ready to accept your email and the email will need to be resent. The contact did not receive the email with this status. You may retry to send the email, but we suggest waiting 72 hours before you try again.
- Bounced The contact's email server rejected the email. Most common reasons for bounces are misspelled email addresses, nonexistent email addresses, or a full recipient inbox. The contact did not receive the email with this status.
- Spam The recipient or their email server marked your email as Spam or Junk. The contact did not receive the email with this status.





#### Email Statuses Cont...

Sending an email to a contact after they unsubscribe, mark your email as spam, or the email is dropped or has bounced can have a negative impact on your IP Address and its sending reputation. Therefore:

- 1. If your contact:
  - a. Unsubscribed from your email
  - b. Marked you as spam
  - c. Has an email with the status of dropped or bounced

HindSite will automatically mark the email address as unsubscribed/bounced under the Contact's Title and will no longer send emails to that address.

Please Note: The 'Email Invoice?' option under the Contact's Phones/Email is not related or tied to the HindSite Connect program. If a contact unsubscribes, bounces, or sends your email to spam, the 'Email Invoice?' field will not change, meaning it will not be unchecked unless you do so manually.

 The person setup to receive HindSite Connect related Pink Messages within the office will also receive a Pink Message stating:

"HindSite Connect Warning. The following email address was flagged as Unsubscribed/Bounced:"

- 3. To determine who gets HindSite Connect related Pink Messages:
  - a. Go to Application Setup
  - b. HS Connect
  - Select the default user you wish to have receive the Connect Messages from the drop down
  - d. Click Save

а

If you'd like to unsubscribe and stop receiving these emails <u>click here</u>

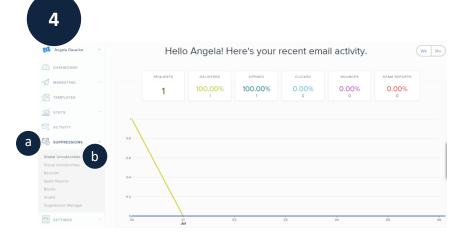


	Sort Order	Name	Title 1	Phone Number	Extension	EMail	Email Invoice?	Email Confirm?	Ema Rem
1	1	Primary Phone	Unsubscribed	123-456-7890		abbyj@hindsitesoftware.c	<b>V</b>		[
		From: Add To: add A: 27 HindSite Cor Unsubscribed 5 Minutes		<b>V</b> following email add vare.com.	ress was flag:	Urgent Messa Urgent Messa ged as Print Pelete Remind Transfer			
						-			
-	Powered b	y SendGrid							
Whe	en using ti	me ranges, always sł	now the first appointn	nent of the day as an	exact time	Manage			
<b>W</b>	en using ti		ow the range to prece						
🥑 Whe		a new email address,	automatically check						
⊘ Whe									
Whee Whee 2	Number	of days before sched							
Whee Whee 2	Number	of days before sched	s on your computer n	eed to be set to "Ne	ver")	Test Confirm			
Whee Whee Whee CFor	Number r this to w	of days before sched	s on your computer n		ver")	Test Confirm			
Whe Whe For Kor	Number r this to w MIN MIN GELA	of days before sched	s on your computer n	eed to be set to "Ne	ver")	Test Confirm			
Whee Whee (For ADI	Number r this to w MIN GELA RL	of days before sched	s on your computer n	eed to be set to "Ne	ver")	Test Confirm			



#### Email Statuses Cont...

- 4. To re-subscribe a customer:
  - a. Click Suppressions located on the left side of the Account Overview screen of your SendGrid account
  - b. Select Global Unsubscribes from the drop down



- c. Select the checkbox to the left of the email address you would like to re-subscribe
- d. Click the Selected tab in the top right corner
- e. Click Remove Global Unsubscribes



f. In HindSite you will need to delete out the "| Unsubscribed" text in the contact's Phone/Email Title filed and recheck their email boxes.

Please Note: You must get permission from the contact if they unsubscribed or marked your email as spam before you re-subscribe them. If you do not and you attempt to email them, you are breaking the CAN-SPAM ACT or Canada's Anti-Spam Legislation.





#### **Emails Sent via Scheduling** View

Want to tell if you already sent an email for a work order? This can be done quickly from the scheduling screen.

1. First ensure your settings allow you to have this view. On the Daily Screen: a. Click Daily Options

- b. Select 'Show tool tips'
- c. Click Save

d. When you hover your mouse over the work order, you will be able to see which emails have been sent for that particular work order.



1 00

200 3 00 Confirmation Sent Reminder Sent

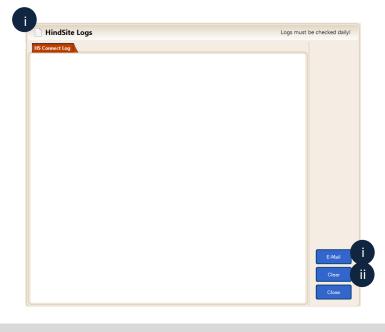


#### HindSite Connect Dashboard

Looking to see the status of an email? Curious to know how many emails have been sent out this week? Want to know which customers did not receive emails? This can all be done from the HindSite Connect Dashboard.

- 1. Click Dashboard on the left hand side of HindSite
- 2. Select the HindSite Connect tab on the right
- 3. The Dashboard contains the following information:
  - a. The HindSite Connect Version you are running
  - b. A date range search option
  - c. The number and type of emails attempted to send in that date range
  - d. The number and type of emails that actually sent out of HindSite in that date range
  - e. The number and type of emails that are in the queue waiting to send
    - Please note, if this number never goes down, you have an error and will want to contact Support
  - f. The number and type of emails that had an error and did not send out
  - g. A list of the emails addresses that had an error and did not send. This list will include:
    - i. The email address the email was coming from
    - ii. The email address the email was sent to
    - iii. The Contact ID
    - iv. The type of email being sent
    - v. The error that occurred
  - h. Refresh This button simply refreshes the email statuses
  - i. The error log for HindSite Connect In the log you can:
    - i. E-Mail the log to HindSite Support
    - ii. Clear out the log (recommended once a week or every other week)







#### HindSite Connect Dashboard Cont...

The HindSite Connect Dashboard also includes visual statistics into the performance of your emails.

4. Click Graph It to view more statistics on the performance of your emails

HindSite Connect version: 8	.25 Status: PROCESSI	NG	💲 Revenue
From Date @ 3/17/2017	Thru Date 🕘 3/17/2017	Refresh	Confirmations
Emails attempted:	No emails attempted in this time period		G Tech Sync Data
		×	Satisfaction Survey
Emails sent out of HindSite:	No emails sent in this time period	∧ ↓	
Emails in the queue waiting to send:	No emails waiting in this time period	^	
		v	
Emails that had an error and did not send:	No emails errored in this time period		
Email from address	Email to address	Contact ID Email Type Error	
			4
			Graph it!
			Close

- 5. The Graphs contain the following information:
  - a. The number of email Sends by Type
  - b. The Performance of Emails sent (for email status definitions, go back to page 27)
  - c. Date filters
  - d. Email Status filters
  - e. Email Type filters
  - f. Each individual email sent for search filters in place above
  - g. The option to View each individual email sent





#### Confirmation and Rescheduled Links in Emails (Templates)

You have the ability to include links in your emails that allow your customers to confirm or reschedule an appointment. Here is how to set up your template:

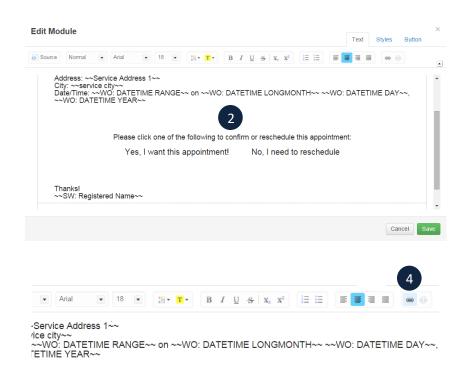
- The following codes can be used to create links that customers can click on to confirm or reschedule their appointment. They must be inserted as hyperlinks:
  - a. Confirm: ~~confirmy~~
  - b. Reschedule: ~~confirmn~~

#### To get the codes into your email:

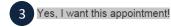
2. Type out the text you wish to hold the link to confirm or reschedule (This is recommended to be done in SendGrid).

In this example, we decided to have the confirmation text be "Yes, I want this appointment!" and the reschedule text to be "No, I need to reschedule".

- 3. Highlight the text you would like to be the confirmation link.
- 4. Click the Link icon located in the tool bar.
- A pop up will appear. Type ~~confirmy~~ or ~~confirmn~~ in the URL bar depending on whether you want the link to be a confirmation link or a reschedule link.
- Click OK once finished and repeat the process if you wish to have rescheduled links.
- 7. Save the template as you normally would after you are done making changes.



Please click one of the following to confirm or reschedule this appointment:



t! No, I need to reschedule





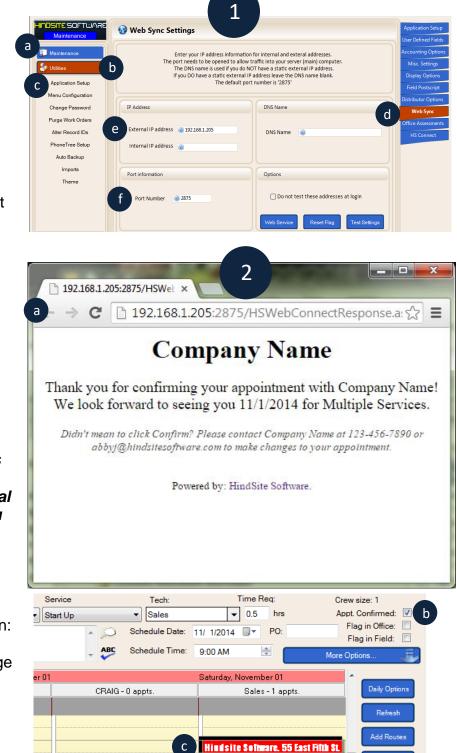
#### Confirmation and Reschedule Links in Emails (HindSite)

You have the ability to include links in your emails that allow your customers to confirm or reschedule an appointment. Here is how to set up your HindSite:

- 1. You must first ensure your HindSite is set up to allow confirmation and reschedule links to function properly in your emails
  - a. Click GoToMaintenance
  - b. Click Utilities
  - c. Click Application Setup
  - d. Select Web Sync located in the menu on the right hand side
  - e. You must have an External IP Address in place for confirmation and reschedule links to work.
  - f. You also need a Port Number in place.

Please Note: If your technicians do not websync from the field and you do not have the External IP Address or Port Number, you will need to contact support.

- 2. When a customer clicks the confirmation link in your email, three things will happen:
  - a. They will be taken to a webpage that contains the following message
  - b. The 'Appt. Confirmed' check box will be marked for the work order
  - c. When you hover over the appointment, the tool tips will display 'Appt. Confirmed'.



11/1/2014 11:00 AM...11:30 AM

Appt. Confirmed

WO - 1115199 NO COMMENT

Confirmation Sent

#### HindSite Connect

Move/Swap

Map Day

Route Tech



#### Confirmation and Reschedule Links in Emails (HindSite) Cont...

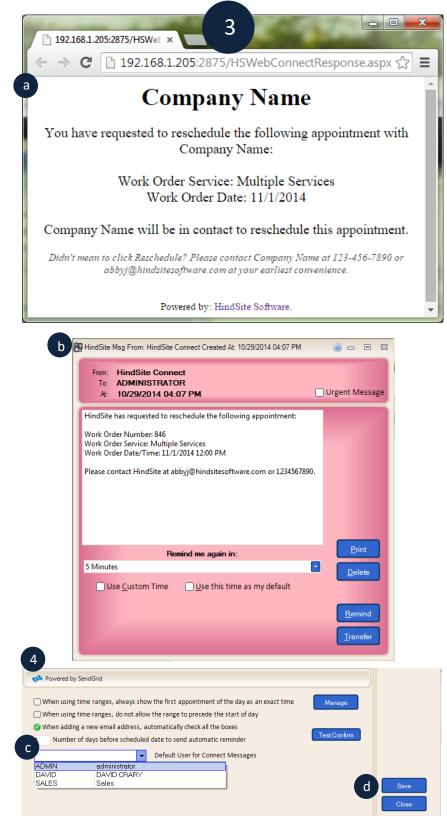
- 3. When a customer clicks the reschedule link in your email, two things will happen:
  - a. They will be taken to a webpage that contains the following message
  - b. The Default User for Connect Messages will receive the following Pink Note:

"Contact ID has requested to reschedule the following appointment:

Work Order Number: Work Order Service: Work Order Date/Time:

Please contact Customer at email address or phone number."

- 4. To determine who gets HindSite Connect related Pink Messages:
  - a. Go to Application Setup
  - b. HS Connect
  - Select the default user you wish to have receive the Connect Messages from the drop down
  - d. Click Save





#### **Emailing Attachments**

HindSite Connect offers you the ability to include any type of attachment with your email sends including Assessments, custom Word Merge docs and generic PDFs. First, let's cover Assessment & Word Merge attachments.

If you like to keep your customers informed of the work done on their property, or if you are required to provide assessments to your customers, you can email them their work order assessment as an attachment.

Assessments can be attached to individual completion emails (manual or automatic) and mass email sends from Work Order Maintenance.

To manually send assessments for a work order,

- 1. Go to Work Orders
- 2. Click Work Order Maintenance
- Use the search fields to find the work order you would like to send the assessment for
- 4. Open the work order
- 5. Select Assessment
- Select either an assessment in the assessment table or Find the Word Merge document you would like to send the assessment as.

If this work order has multiple assessments completed for it (i.e. before and after pictures) you can select up to 5 assessments to be included on the completion email (hold down the Ctrl key & select each assessment).

7. Click Email (The Preview will appear and the email can be sent as normal)

NDSITE SOFTWARE	1st Search	Field	2nd Sear	ch Field		3rd Search F	ield	4th Search Field	đ	Retrieve
Daily Work	WO: Work Order	# •	De-Ice Per	Trip Rate 💌	Con	tact ID	•	WO: Status	•	Clear
🔨 Schedule	Like	•	<	•	Like		•			OTen
Job Contracts					%15	5			•	Report
Snow Manager								HS Co		Chg. Cols.
	W0: Work Order #		me Scheduled	Contact ID		W0: Tech ID	W0: Statu		W(	
aily Must Do	1112014 1112178	1/15/2009	8:00:00 AM 9:00:00 AM	155 Wilks E 155 Wilks E		SERGI Crew#3	Complet Complet		6 1	Single Rows
	1114905	6/25/2013	12:00:00 PM	155 Wilks E	Blvd.	Crew#1	Complet	e No	1	
intacts	1115191	1/2/2015 2	:00:01 PM	155 Wilks E	sivd.	CHAIG	Incomple	ete No	1	
ork Orders										Print
Work Order										
Maintenance										Recur
Pending										
Incomplete										Contact Info
Recurring										Summary
Admin Times										
Reports										Materials
ub Systems										Times
shboard										
										New
lessage									4	Open
GoTo Maint									4	
Help										Delete
Exit										

Work Order	1114905	Mgmt Company	Golliday Sporting Goods
Customer ID	155 Wilks Blvd. 🗸	Name	
Technician	Crew #1 -	Company	Golliday
Service	BackFlow -	Address	155 Wilks Blvd.
PO Number		City	Middlefield
Schedule Date	6/25/2013 12:00 PM	Phone	<b>•</b>
Status	Complete •	Hours Requested	1
Estimate	•	Invoiced?	No   Num:
Comments	NO COMMENT		ABC
			- Merge
Field Remarks	BACKFLOW COMPLETED		5 Assessment
			Recur
Msgs from Field			▲ Materials
			Times
Bill To ID	155 Wilks Blvd.	Sales Rep	Price Override
Date Created	6/25/2013 8:54 AM	Created By	ADMIN Save
Date Changed	6/25/2013 9:04 AM	Changed By	ADMIN Close
Date onlanged	0/20/2010 0.04 AM	onunged by	Close

Assessment Name	Datetime Scheduled
Assessment Test	6/25/2013 12:00:00 PM
	7 Email
	<u>R</u> eport
	Close
	0 jūse



Active

## Emailing Attachments Cont...

You can also set up your assessments to be attached on automatic completion emails to eliminate even more work on your end. To set up assessments to attach to automatic completions:

- 1. Click GoTo Maint
- 2. Select Assessments
- 3. Choose an Assessment
- 4. Click Open

Active Assessment Name Assessment Test BLOW OUTS CONTROLLER TYPE 9/7/2016 9:15:07 AM 9/30/2015 8:33:05 A Yes Yes Yes 12/11/2014 10:59:5. 4/7/2014 12:48:11 P O Inactive UMBER OF 3 Rpz Testing WINTERIZATION 2/28/2012 1:13:10 P., Yes 11/25/2016 11:58:5., Yes Routes s and Categori Tax Codes Employees Products/Parts Field Remarks 2 Office Assessment Contact Status Office Comment Work Categories Estimate Templates

Assessment name: Picture Assessment

On the Assessment page:

5. Check the box: "When automatically sending email attachments, always attach this one"

This will let HindSite know to look for this Assessment when sending out automatic completions and attach it to the email as a PDF.

Follow these steps for each Assessment you want included on automatic completion emails.

 \*Please Note: No completion emails will send automatically unless the checkbox is marked to "Allow Automatic Sends" under Application Setup > HS Connect.







#### Emailing Attachments Cont...

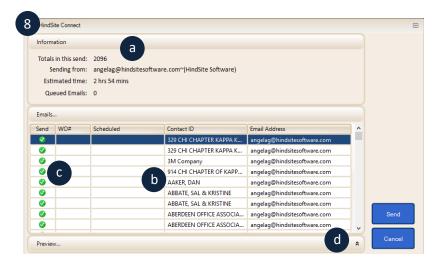
You can also send attachments from anywhere you can send mass emails including Job Contracts, Contacts, and Work Order Maintenance. To include an attachment to a mass email:

- 1. Select either Job Contracts, Contacts or Work Order Maintenance
- Use your search filters to retrieve the contracts/clients/work orders you would like to send emails for
- 3. Click HS Connect
- 4. A pop up will appear with template and attachment options
- 5. Select the template you wish to use from the dropdown menu
- 6. Click Browse to find the Word or PDF document you wish to attach *Please Note: Attaching Assessments to mass emails can only be sent from Work Order Maintenance because the Assessment must be tied to a work order.*
- 7. Click Review
- 8. A pop up will appear with:
  - How many emails will be sent, who the emails will come from, how long the mass send should take, and how many emails are in your Queue
  - b. A list of the contacts that will receive the email
  - c. The ability to not send the email to some of the email addresses in the list
  - d. The ability to pop up a preview of the email
  - e. The ability to send the emails

f. The ability to cancel this mass send When you hit send, the attachment/assessment will be converted to a PDF and automatically attached to the email.

📀 HindSite	1st Search	Field 2nd Searc	h Field	3rd Sear	ch Field	4th Search Field	5th Search I	ield	Retrieve
Daily Work	E-Mail	<ul> <li>Active Statu</li> </ul>	s ~	Phones: Tit	le v	~		~	Clear
	NOT EMPTY	~		Like	~	Like ~	Like	~	Chg. Cols.
🔨 Schedule		Active	~						
🚺 Job Contracts		(Hint: Use LIKE a	ind % as a wil	ldcard, e.g. LIKE	"%main%' give	s everyone who lives on Ma	3 на са	nnect	Report
Snow Manager	Map ID	Controller Type:	Balance	Phones	E-Mail		Map Cod	- S ^	Remove
		TORO HYDRAULIC	0			jelag@hindsitesoftware.co			
Sales Manager	ABBAT.	TMC-212	0	KRISTINE.		angelag@hindsitesoftwar			Single Row
•		TMC 424	0	Primary P.,		one - angelag@hindsiteso			
	ACCES		ů.	Alternate		hone - angelag@hindsites			Display
🧾 Daily Must Do		TOTAL CONTROLLER	0	Primary P.,		one - angelag@hindsiteso			Options
•		HUNTER	ů.	BEN'S CE		L - angelag@hindsitesoft			Active
Sontacts		CUSTOM CMD	0	Primary P.,		one - angelag@hindsiteso			Inactive
	ADVAN.	HUNTER	ů.	OFFICE		L - angelag@hindsitesoftw			
Open Contacts	ADVAN		0	JUDY DU.,		AS - angelag@hindsitesot			Prospect
	AHREN	TORO ECX	ů.	DAVE - 88.		elag@hindsitesoftware.com			□ Sold
Spreadsheet Export	ALBIN,	TMC-212	0	HOME - 8		gelag@hindsitesoftware.co			-
	ALBRI	VISION	0	Primary P	Primary Ph	one - angelag@hindsiteso	ftware 314-3D		🗌 All
Print Labels	. ALM, T.,	TMC-212	0	KAREN	KAREN - ar	ngelag@hindsitesoftware.c	om 449-4A		
2	ALSOP,	Hunter	0	Primary P	Primary Ph	one - angelag@hindsiteso	ftware 315-2C		Display Mgm
Work Orders	ALTST	TMC-212	0	Alternate	GENE - any	gelag@hindsitesoftware.co	m 370-3A	s	Companies
thore orders	ALVAR	GREENKEEPER	0	Primary P	Primary Ph	one - angelag@hindsiteso	ftware 397-3B		
🚰 Reports	AMERI	GREENKEEPER	0	MAIN - 88	MAIN - ang	elag@hindsitesoftware.com	n 342-3C		History
Kepons	ANDER	irritrol	0	Primary P		one - angelag@hindsiteso			HIStory
£.	ANDER	NELSON	0	HOME - 8	HOME - an	gelag@hindsitesoftware.co	om 342-1D		Change ID
🚀 Sub Systems	ANDER	VIS	0	Primary P	Primary Ph	one - angelag@hindsiteso	ftware 341-3A		Change IL
-	ANDER	TMC-212	0	Primary P		one - angelag@hindsiteso			Pre-Paymer
Dashboard	ANDER	tmc212	0	BRENT	MEGAN CE	LL - angelag@hindsitesof	tware 451-1D		Pre-Paymer
<b>•</b>	ANDER	CUST COMMAND	0	HOME - 8	DAN - ange	lag@hindsitesoftware.com	262-4A		
🕵 Message		evolution	71.8	HOMEOW		VER - angelag@hindsitesc			Schedule
		TOTAL control	1851.15	Alternate		hone - angelag@hindsites			
*		CUSTOM CMD	0	Primary P	Primary Ph	one - angelag@hindsiteso	ftware 425-1B		New
🍋 GoTo Maint		CUSTOM CMD	0	JILL - 888		lag@hindsitesoftware.com			
		TMC-212	0	Primary P		one - angelag@hindsiteso			Open
🕐 Help	ANDER	CUSTOM COMMAND	0	Primary P		one - angelag@hindsiteso		L	
	ANDER	SLIM-DIAL	0	Primary P		one - angelag@hindsiteso		TI	Delete
e Exit		Tmc 212	0	Primary P	Primary Ph	one - angelag@hindsiteso	ftware 342-3D		
	<			Lank 1 and	I mit mit	and an	n	>	Close

4	
HS Cor	nect Building relationships is what we do.
	ate from the drop down list. This template will be used in the emails sent. Only the contacts with valid email addresses will send.
Template	Spring Scheduling Request
Attachment	K:\Angela's Stuff\2017 Contract Packages.docx Browse
Assessment	v
	7 Review Cancel



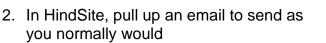


#### **Editable Subject Lines**

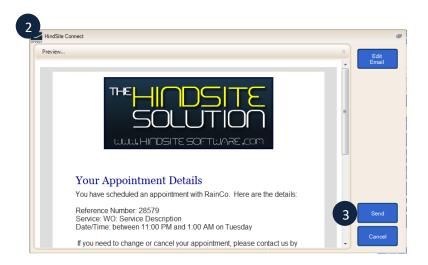
You have the ability to edit the subject lines of your emails as long as you leave them blank when you create them in SendGrid. Here is how it works:

1. You must first ensure the subject of the email template is left blank in SendGrid

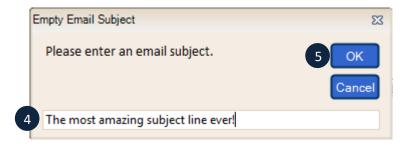




 When you click Send, a pop up will appear asking you to please provide a subject for the email



- 4. Type in the subject
- 5. Click OK and send as normal





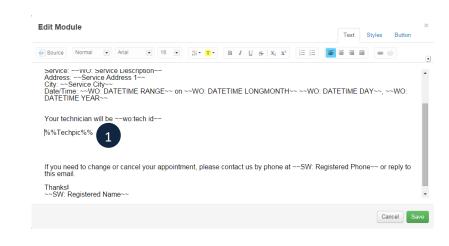
## Adding an Employee's Picture

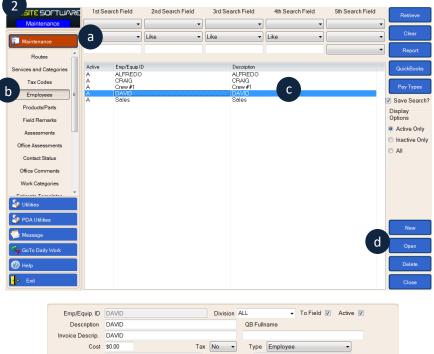
You have the ability to add an employee's picture to your emails so your customers can put a face to the name of the employee out servicing their property. To add a photo:

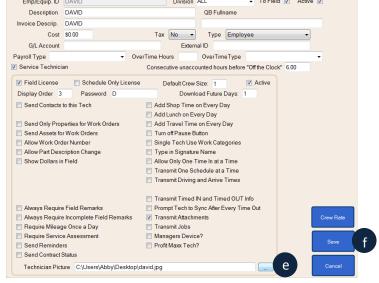
- Place the code %%techpic%% into your email template in the location you wish the picture to appear.
- 2. Next you need to upload the photo for your employee.
  - a. Go to Maintenance
  - b. Click Employees
  - c. Select the employee you want to add a photo for
  - d. Click Open
  - e. Click the button located next to Technician Picture and upload the photo you wish to use for that tech.
  - f. Click Save once finished.

## Please Note: Here are a few disclaimers about employee pictures:

- Where you align the text in the email template is where the employee picture will align to.
- The photo cannot be resized once it is uploaded. You may want to do a couple test sends to yourself to ensure the image is the right size for your email.
- HindSite recommends the length and width of the photo does not exceed 250 pixels.
- When a preview pops up with the technician picture variable in it, the preview will not show the picture. The picture will appear in the email, it simply does not show in the preview. This is another good reason to send yourself a test email first to ensure everything looks correct.









### **Congratulations!**

You are now able to send emails with HindSite Connect!

You now have the skills to:

- Assign templates to specific services
- Send emails directly from your Daily
   Schedule screen
- Send emails from Daily Options
- Set up Automatic Reminder and Completion emails
- Send emails in a Mass format for Contracts and current, past, and Pending Work Orders
- Check the status of an email in the Dashboard and the Contact's History
- Add Confirmation and Reschedule links to your emails for your customers to click
- Email Assessments as attachments
- Add Employee or Technician pictures

If you have any additional questions, please contact your HindSite Prof today. And don't forget about the additional resources that are available:

- <u>HindSite Connect FAQs</u>: Look up questions commonly asked by HindSite Connect users. You will also find a list of the HindSite specific variables that can be used with your HS Connect emails.
- <u>Setting Up Templates for HindSite</u> <u>Connect</u>: Learn how to create and edit templates in SendGrid to use with HindSite Connect.