

# HindSite Connect: Setting Up HindSite Connect Within HindSite

(Revised 3/2017)

# 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.
2. **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.
3. **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.
5. **Completion** – This is an email that is sent after an appointment is completed notifying your customer that the work order is completed.
6. **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.
9. **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 [Setting Up Templates For HindSite Connect](#), 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 HindSite. If not, update HindSite.
- If you have not agreed to our [Connect 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.

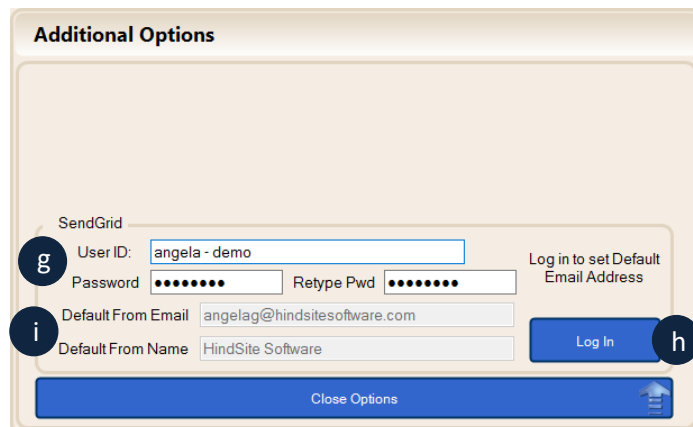
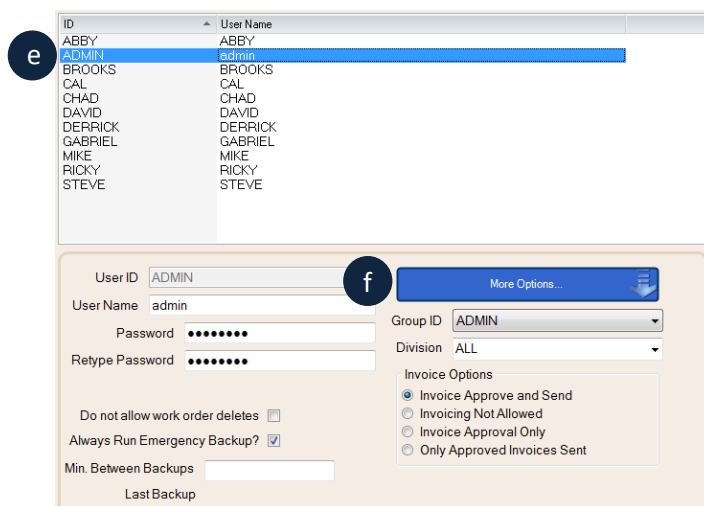
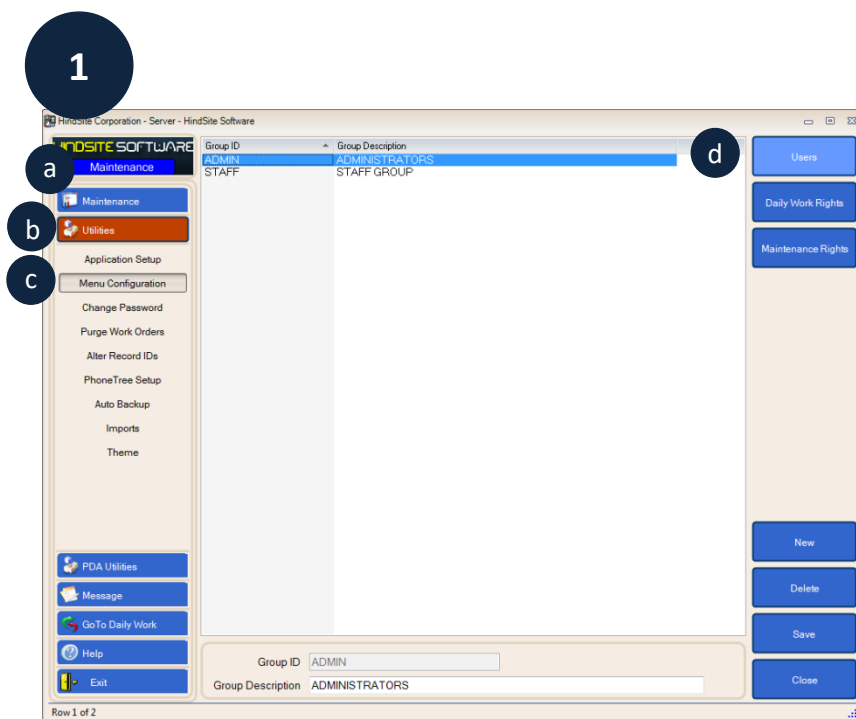
- a. Click Go to Maintenance
- b. Click Utilities.
- c. Click Menu Configuration.
- d. Click Users.

- e. Select ADMIN.
- f. Click More Options

- g. Enter your SendGrid User ID and Password
- h. Click Log In
- i. Enter the Default From Email (the email address you want your emails to send from)
- j. Enter the Default From Name to 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).



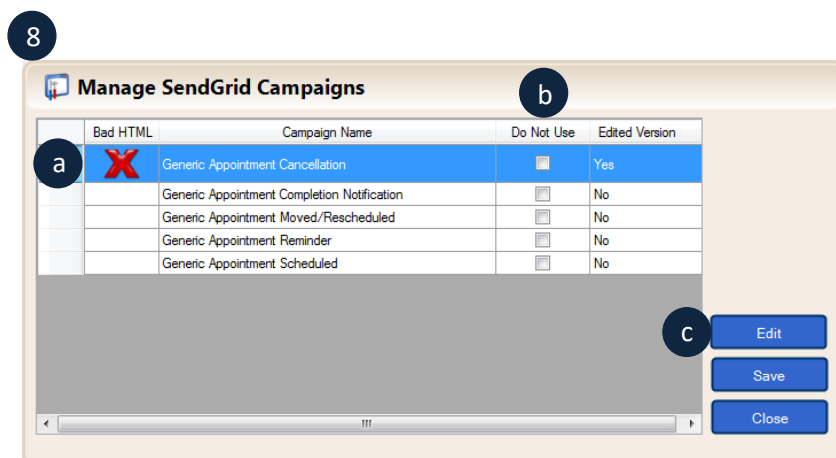
# Setting Up Default Email Templates

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.
7. 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
    - i. 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**)

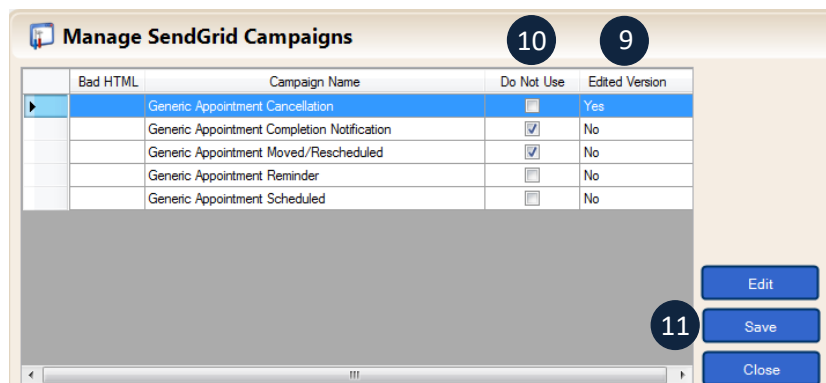
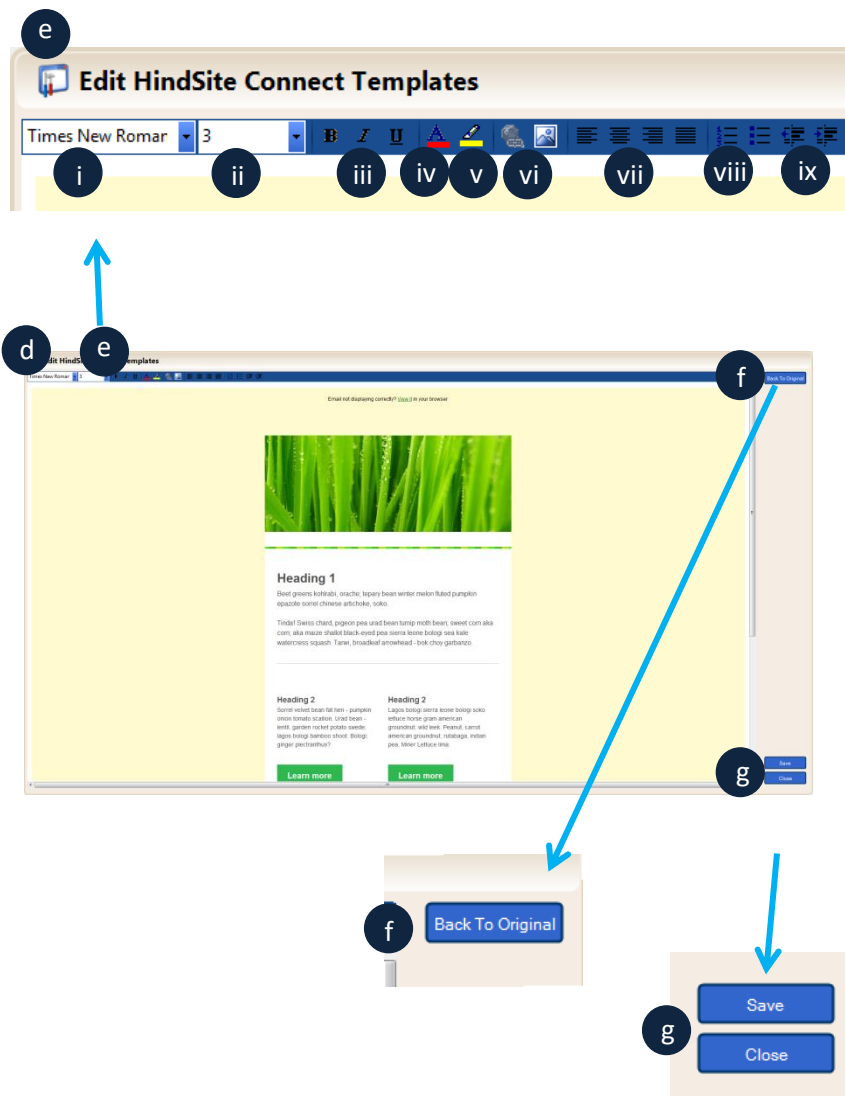


# Setting Up Default Email Templates Cont...

- 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
    1. 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).***

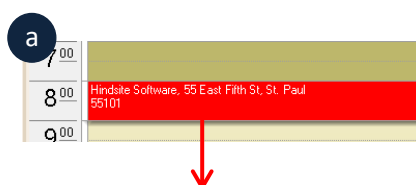
9. To determine if a template has been edited, check the column titled Edited Version. Yes means it has been edited, No means it is the original email template created in SendGrid.
10. To not show a template in the template select drop downs, simply check the Do Not Use box.
11. Click Save when finished.



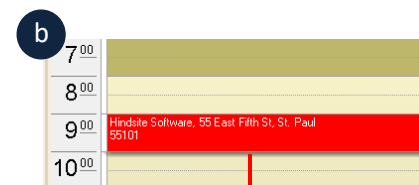
# Specifying Time Settings for Emails

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**
  - a. 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)
  - b. 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

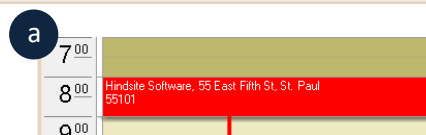
Date/Time: at 8:00 AM



Date/Time: between 8:00 AM and 11:00 AM

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.

Date/Time: between 8:00 AM and 11:00 AM



# 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:

- Select GoToMaint.
- Select Services and Categories.
- Click on the category you wish to set up templates for.
- 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.**

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



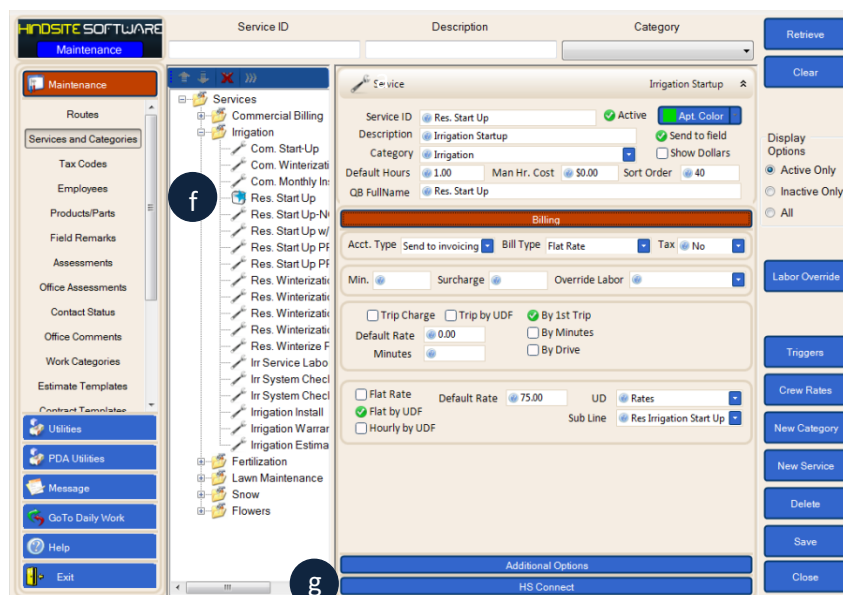
The screenshots illustrate the steps for assigning email templates to services in HindSite Connect:

- 1**: The main interface shows the 'Maintenance' menu. The 'Services and Categories' option is highlighted.
- a**: The 'Maintenance' menu is expanded, showing various options like Routes, Services and Categories, Tax Codes, etc.
- b**: The 'Services and Categories' option is selected, displaying a list of services including Commercial Billing, Irrigation, Fertilization, Lawn Maintenance, Snow, and Flowers.
- c**: The 'Irrigation' service is selected, showing its details.
- d**: The 'HindSite Connect Options' dialog box is displayed, allowing users to configure email sending for various service categories. The 'Confirmation' and 'Reminder' options are set to 'Set to Send'.
- e**: The 'Update' button is clicked to save the changes.
- f**: The 'Save' button is clicked to complete the process.



# 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.

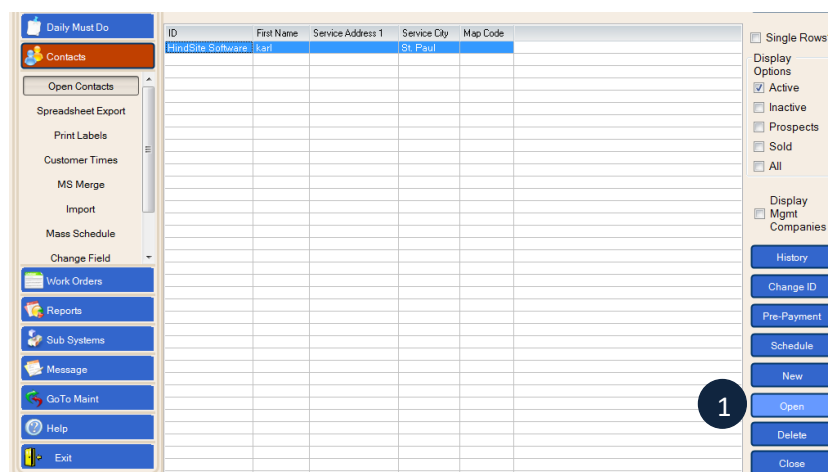
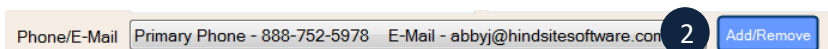
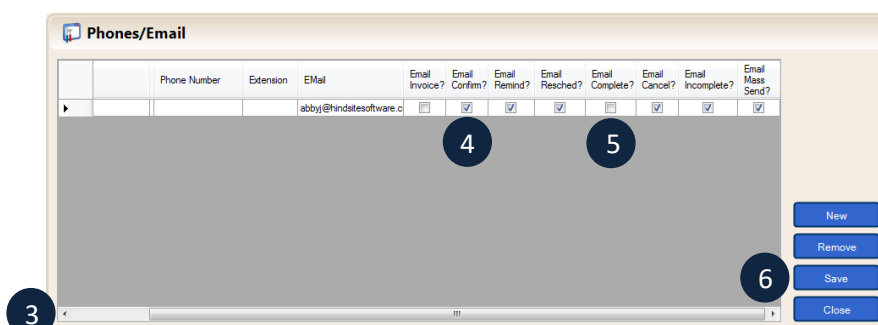
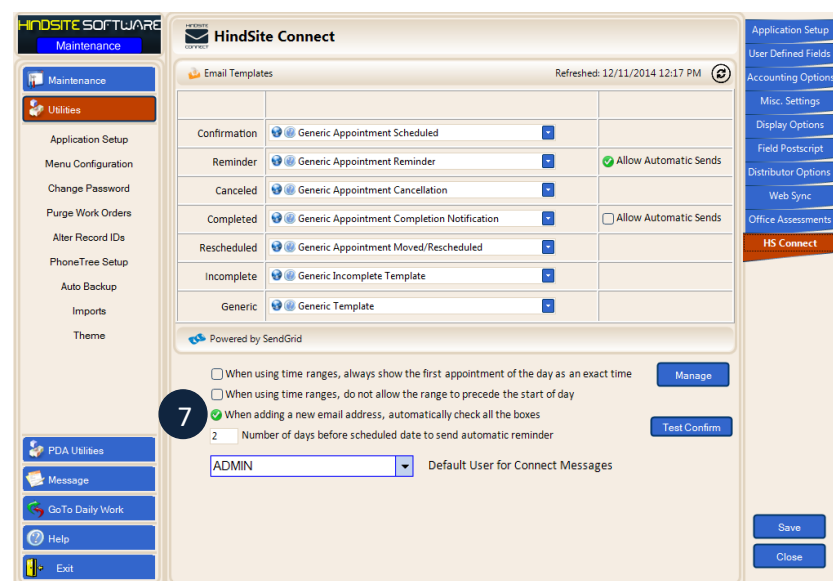


# Contact Email Flags

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.
7. 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.

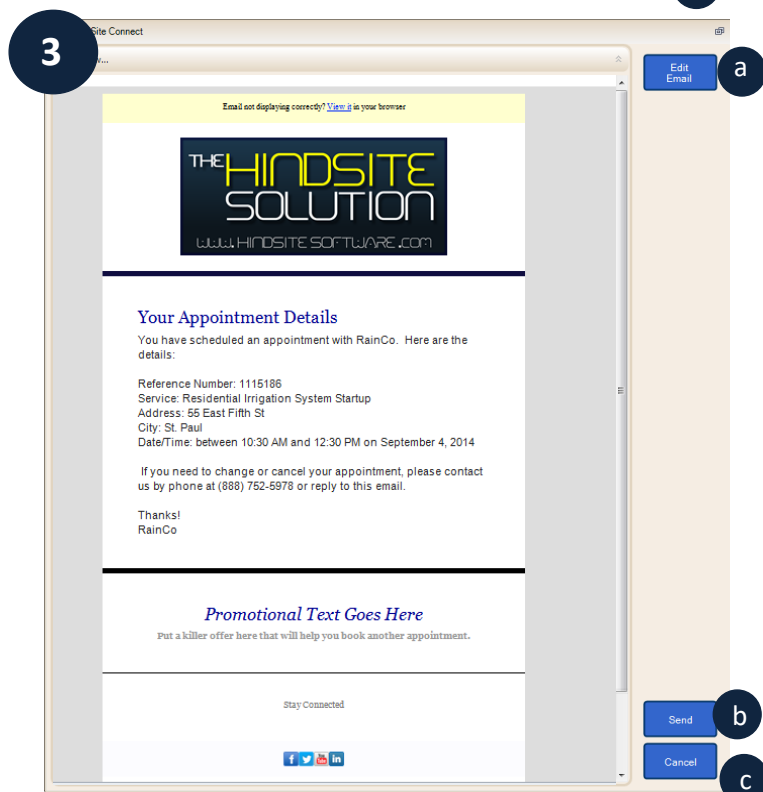
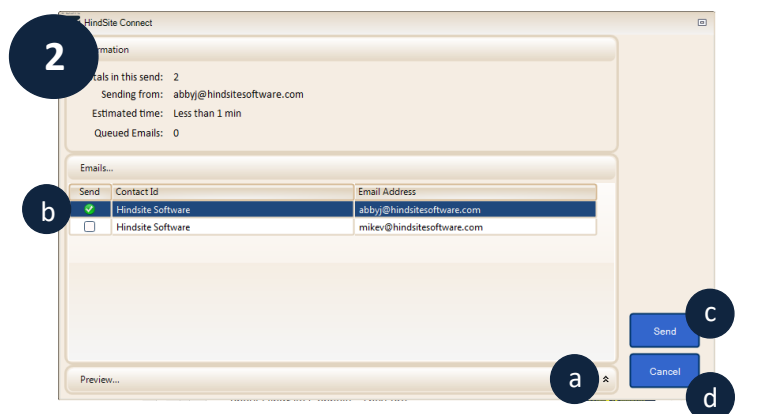
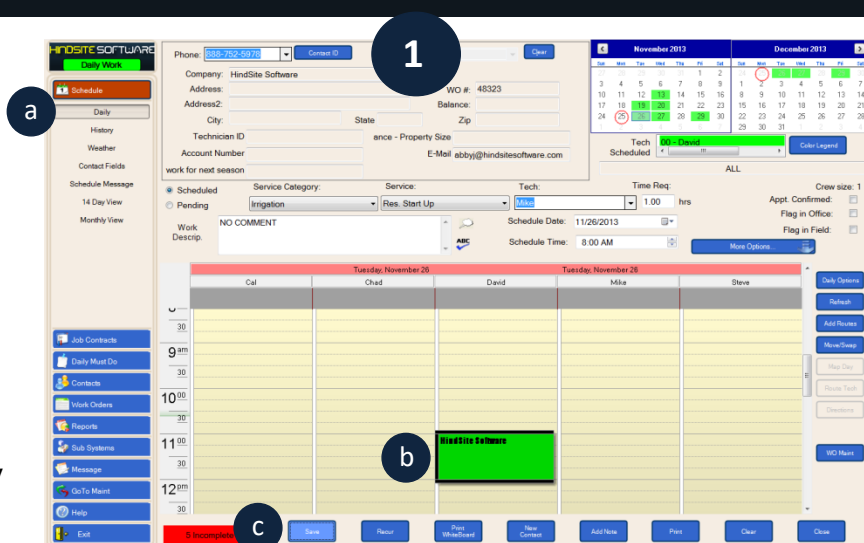
**Please Note: If you would prefer to not have the boxes check automatically when adding a new email address, do not check this box. You will need to go in manually and check which emails you would like the new email address to receive.**

# 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:
  - a. 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).



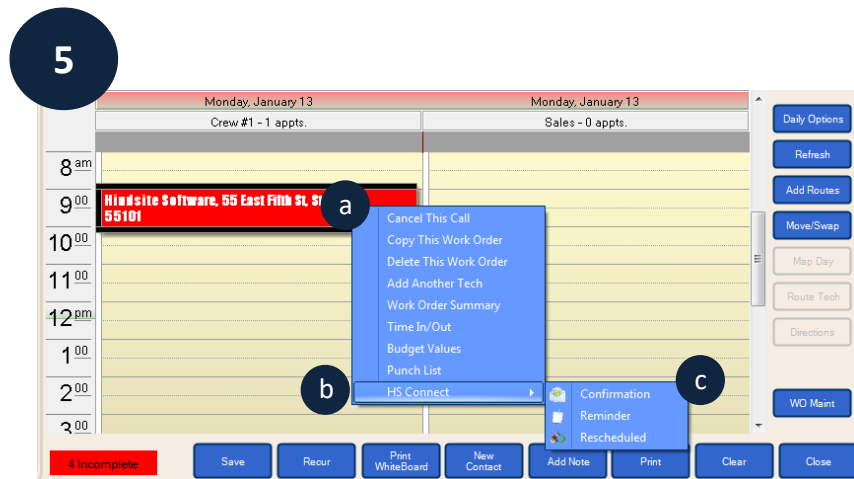
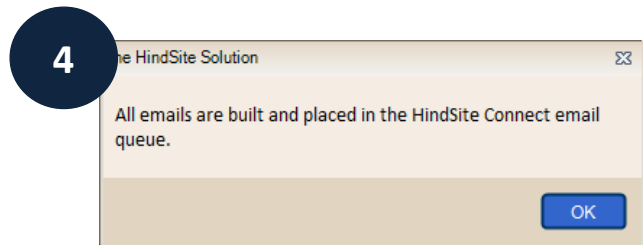
## Sending From the Daily Screen Cont...

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**.

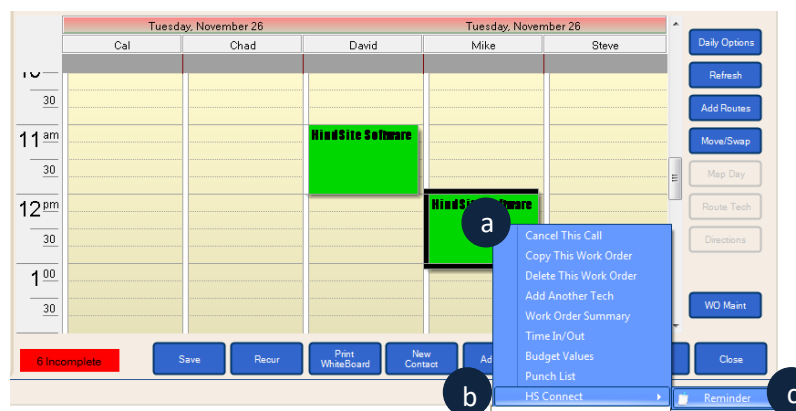
To send Reminder emails **manually**, you must select the day you wish to send reminders for from the calendar in the upper right corner of the Daily screen. You have the option of sending a reminder email manually one of two ways: From the schedule itself, or from Daily Options. You are only able to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



6



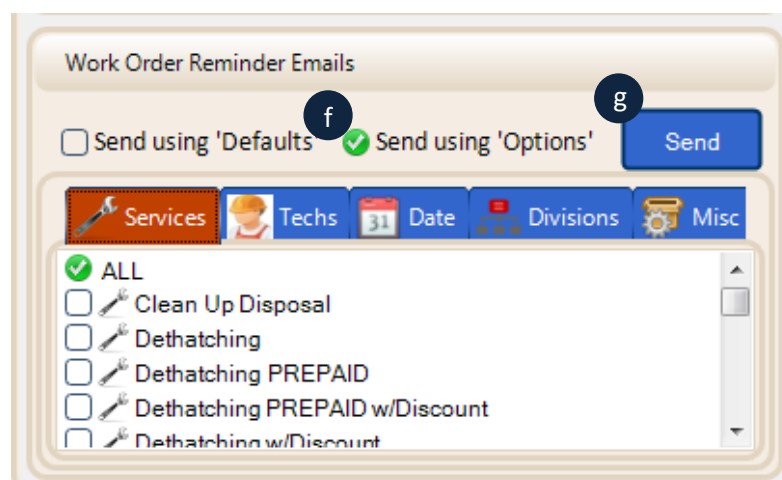
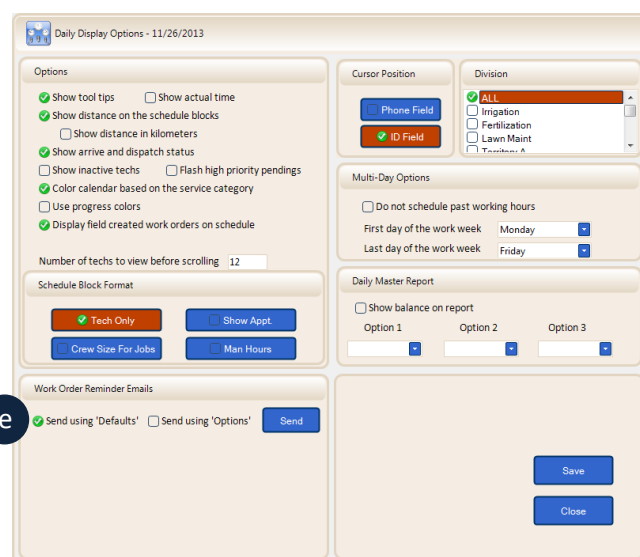
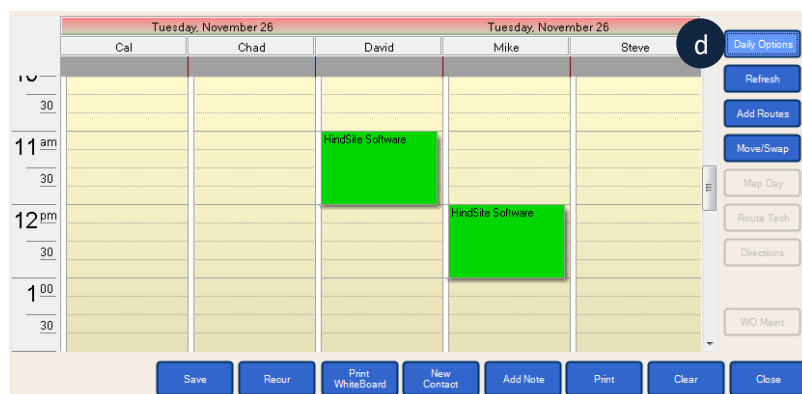
# Sending from Daily Options

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
  - ii. 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:

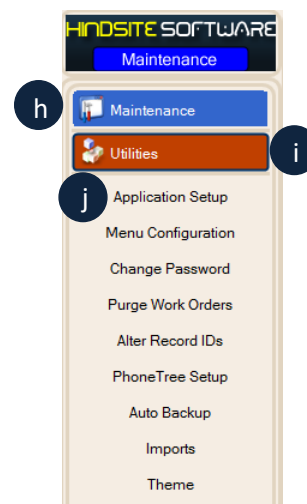
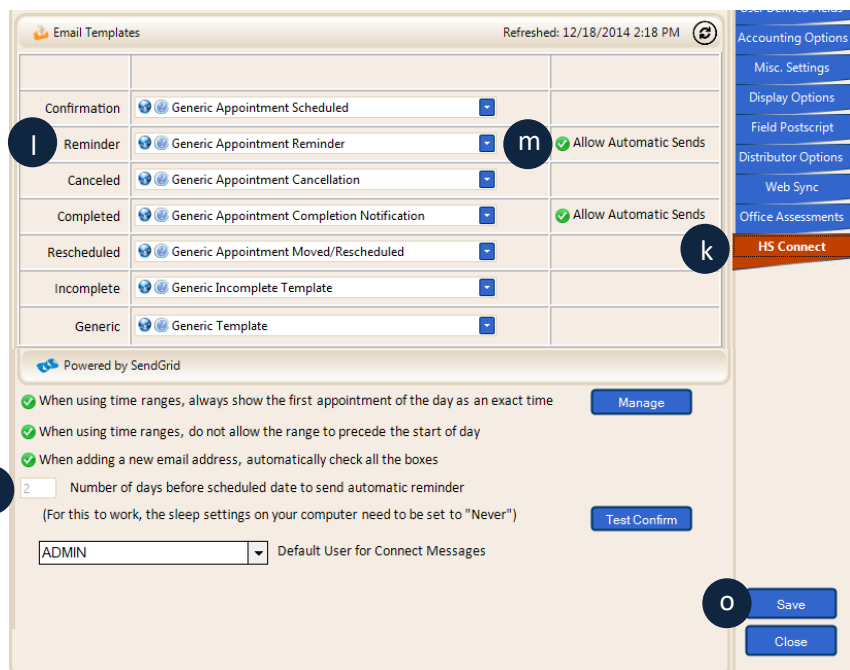
- h. Click the GoToMaint tab
- i. Click Utilities
- j. Click Application Setup
- k. Select HS Connect
- l. Select a template for the Reminder email section (*You also have the ability to set up Reminder emails by the services under Categories and Services*)
- m. Next to the Default Reminder Email Template, check the 'Allow Automatic Sends' box.
- 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.

**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).

Confirmation	Generic Appointment Scheduled	
Reminder	Generic Appointment Reminder	<input checked="" type="checkbox"/> Allow Automatic Sends
Canceled	Generic Appointment Cancellation	
Completed	Generic Appointment Completion Notification	<input checked="" type="checkbox"/> Allow Automatic Sends
Rescheduled	Generic Appointment Moved/Rescheduled	
Incomplete	Generic Incomplete Template	
Generic	Generic Template	

Powered by SendGrid

- ☒ When using time ranges, always show the first appointment of the day as an exact time
- ☒ When using time 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 of days before scheduled date to send automatic reminder  
(For this to work, the sleep settings on your computer need to be set to "Never")

ADMIN Default User for Connect Messages

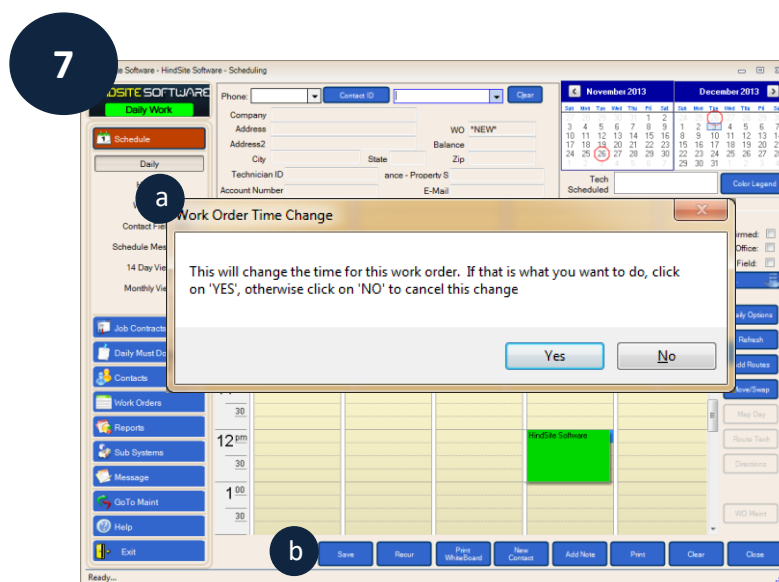
Buttons: Manage, Test Confirm, Save, Close



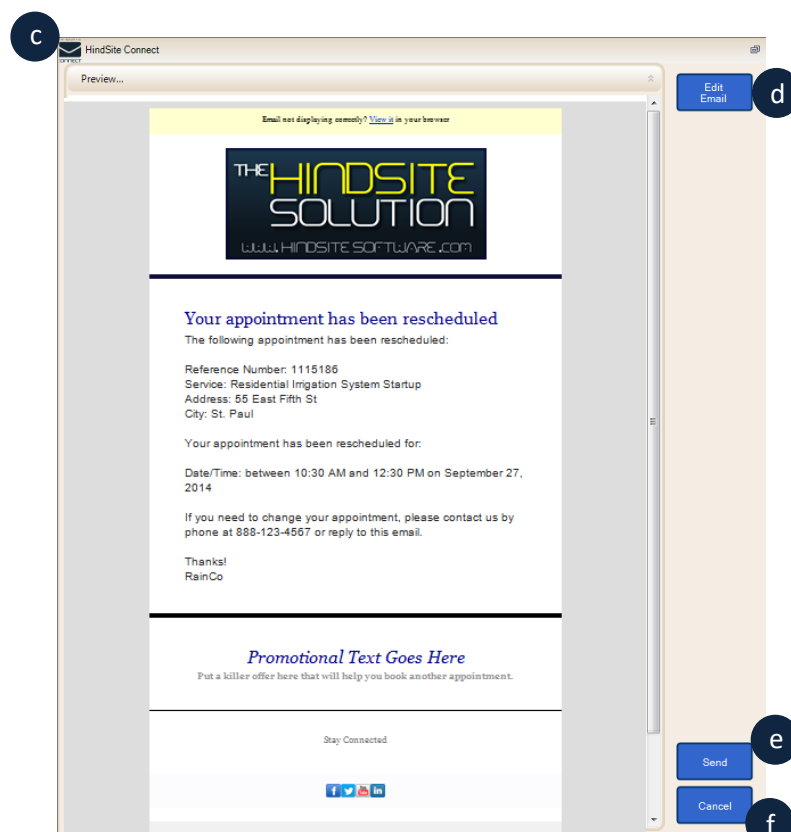
# Sending From the Daily Screen Cont...

7. To send a Rescheduled appointment email:

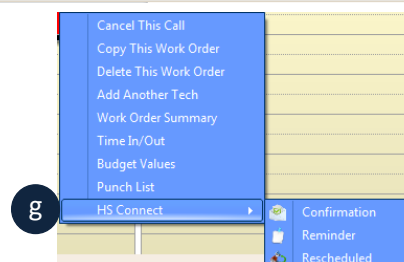
- a. Reschedule the appointment as you normally would.
- b. Once you agree to the time/tech/or day changes, click Save.



- c. 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.



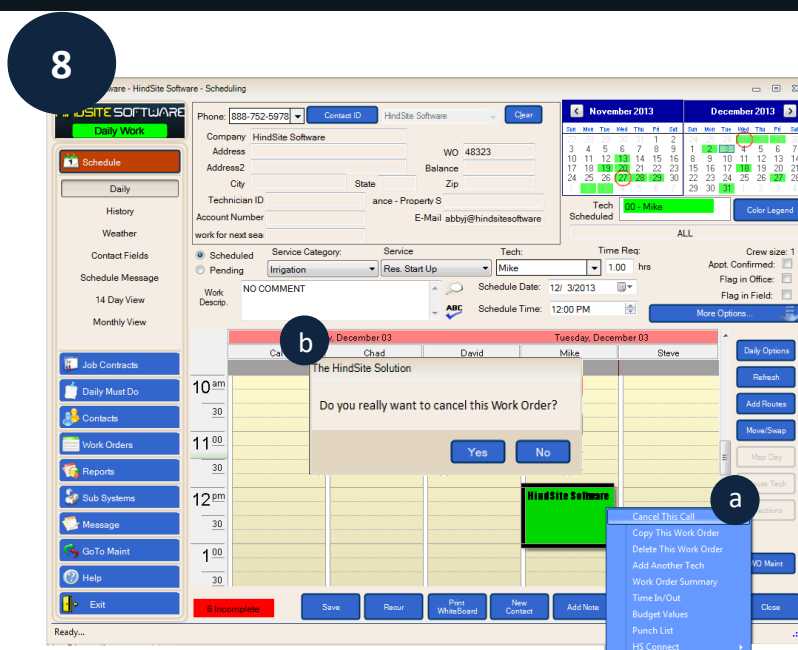
- g. You always have the option to right click the work order at a later time to send the email.



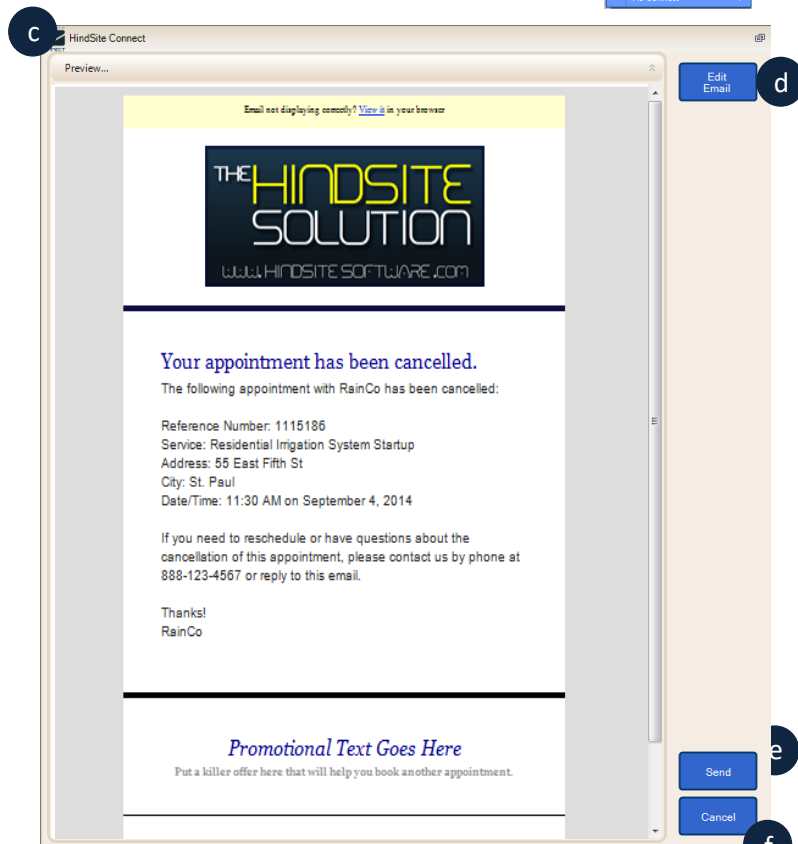


# Sending From the Daily Screen Cont...

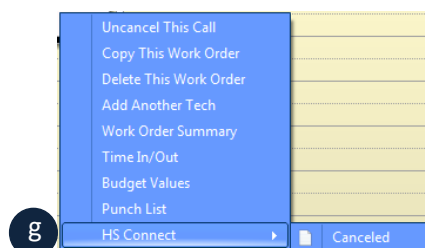
8. To send a Cancelled appointment email:
  - a. Cancel the appointment as you normally would.
  - b. After you click Yes for the pop up asking 'Do you really want to cancel this Work Order?', and fill in the information about who is cancelling the work order and why, your preview pop up will appear.



- 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.



# Completion Emails (Automatic)

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

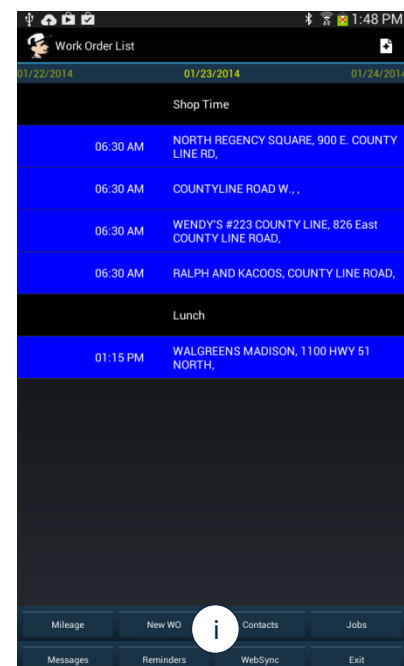
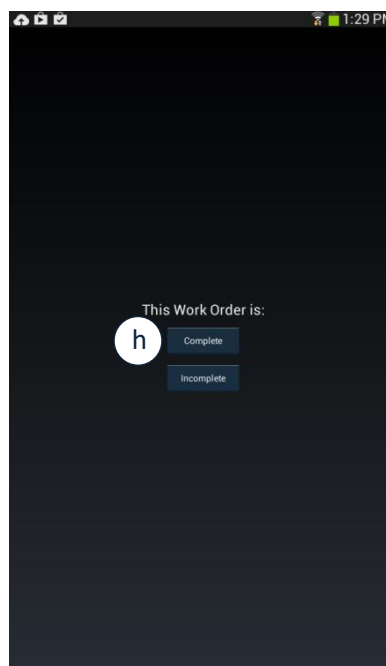
**Please Note: Field created work orders follow a different process when it comes to completion emails. Please see page 19 for this process.**

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

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

In the field...

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



# Completion Emails (Manual)

10. To send completion emails **manually**:

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

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

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

**Back in the office...**

- Right click the completed work order
- Select HS Connect
- Click on Completion

- A preview of the email will appear.
- Edit Email – This allows you to change the text of an individual email without changing the template.
- Click Send if you are ready to send.
- 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.



The screenshot shows the HindSite Connect interface. At the top, there's a '10' in a blue circle. The main window is titled 'Email Templates' and shows a list of templates. The 'Completed' template is selected, and the 'Allow Automatic Sends' checkbox is unchecked. A blue circle 'b' is next to this checkbox. Below the list, there are checkboxes for 'When using time ranges, always show the first appointment of the day as an exact time', 'When using time ranges, do not allow the range to precede the start of day', and 'When adding a new email address, automatically check all the boxes'. There's also a 'Number of days before scheduled date to send automatic reminder' field set to '2'. A 'Test Confirm' button is visible. A blue circle 'c' is next to the 'Save' button. Below this, there's a 'Hindsite Software, 55 East Fifth St, St. Paul 55101' address field. A blue circle 'f' is next to it. A right-click context menu is open over the address field, showing options like 'Cancel This Call', 'Copy This Work Order', 'Delete This Work Order', 'Add Another Tech', 'Work Order Summary', 'Time In/Out', 'Budget Values', 'Punch List', and 'HS Connect'. A blue circle 'g' is next to the 'HS Connect' option. Below the context menu, there's a 'Completion' button. A blue circle 'h' is next to it. At the bottom, there's a preview of the email. The preview shows the HindSite logo and the text 'Your Appointment Is Completed!'. A blue circle 'i' is next to the preview. A blue circle 'j' is next to the 'Edit Email' button. At the bottom right, there are 'Send' and 'Cancel' buttons. A blue circle 'k' is next to the 'Send' button, and a blue circle 'l' is next to the 'Cancel' button.

# Completion Emails (Field Created Work Orders)

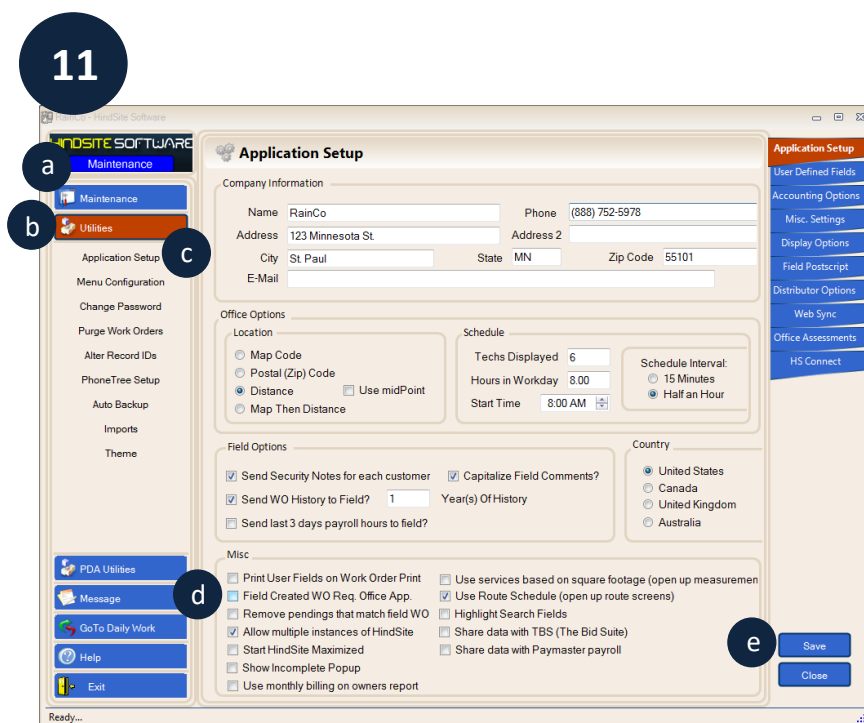
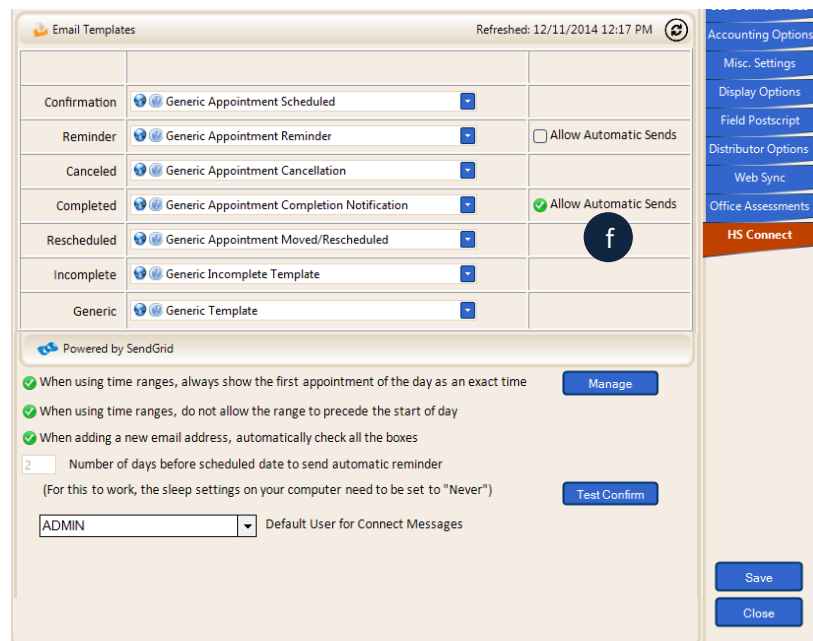
The automatic sending of **field created** work order completion emails is dependent on your settings within HindSite.

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.

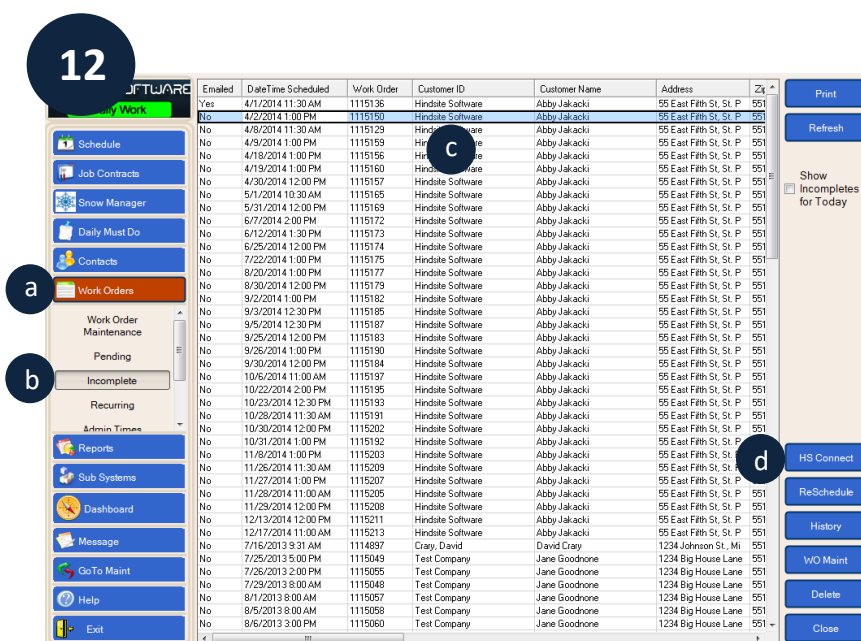
- f. **Note: No completion emails will send automatically unless you've checked the box stating you want completion emails to send automatically.**

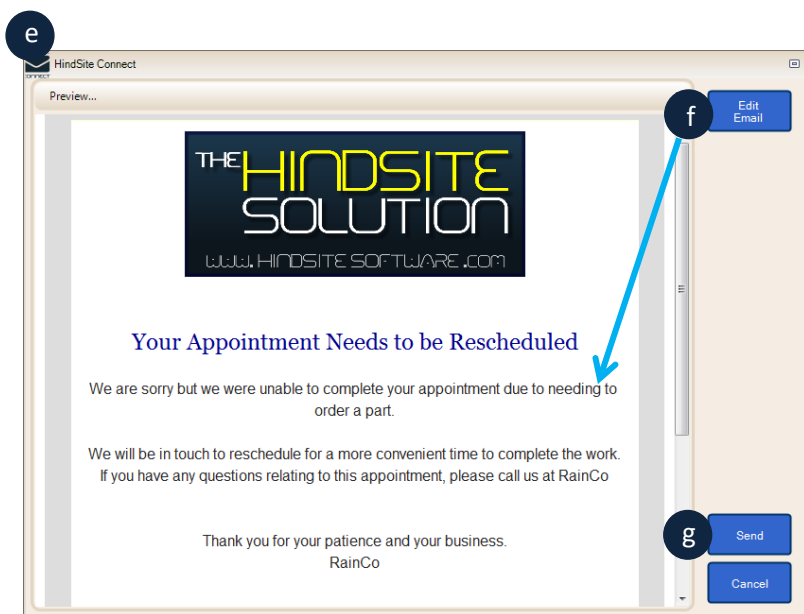
# Incomplete Work Order Emails

12. To send an incomplete email:

- Go to Work Orders
- Click Incomplete
- Select the work order you would like to email
- Click the HS Connect button



- A preview of the email will pop up
- 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.
- Click Send



- 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.

h

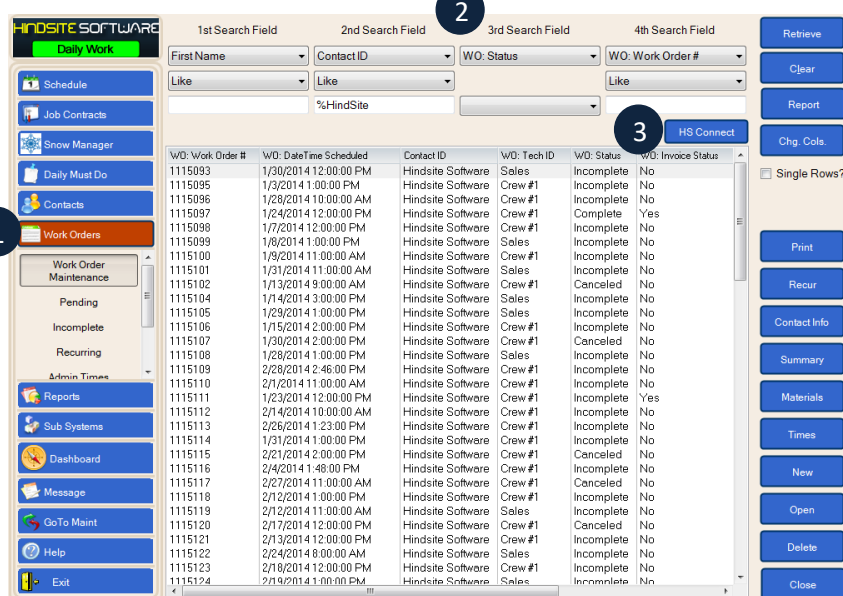
Emailed	DateTime Scheduled	Work Order	Customer ID	Customer Name	Address	Zt
Yes	4/1/2014 11:30 AM	1115136	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551
No	4/2/2014 1:00 PM	1115150	Hindsite Software	Abby Jakacki	55 East Fifth St. St. P	551

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

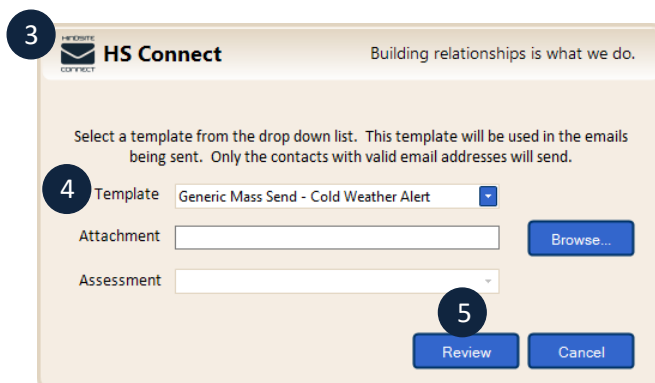
# Mass Email Sends (Work Order Maintenance)

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

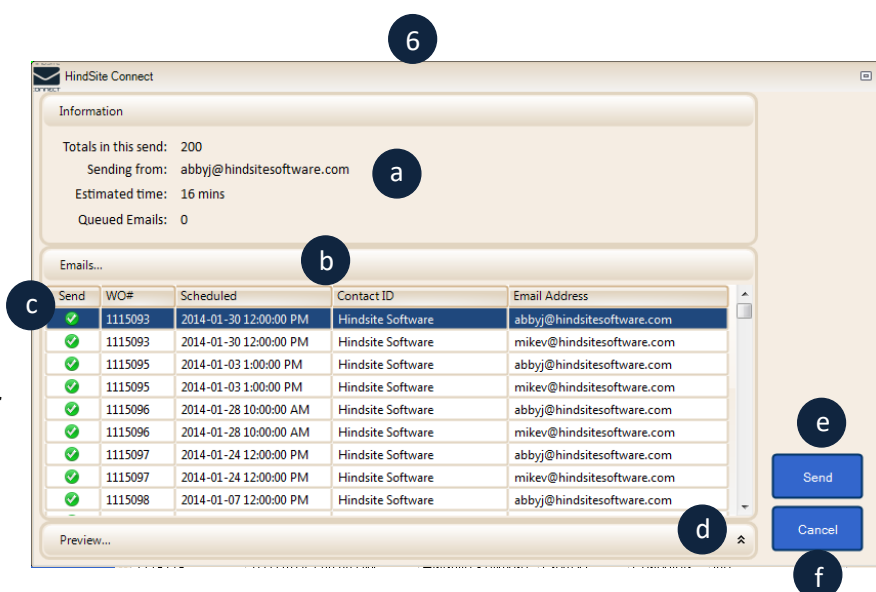
1. Select Work Order Maintenance located under Work Orders
2. Use your search fields to generate a list you would like to send to.
3. Select HS Connect. A pop up will appear asking you to select a template.
4. Select the template you would like to send to your list (For instructions on including Attachments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



6. 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



**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.**





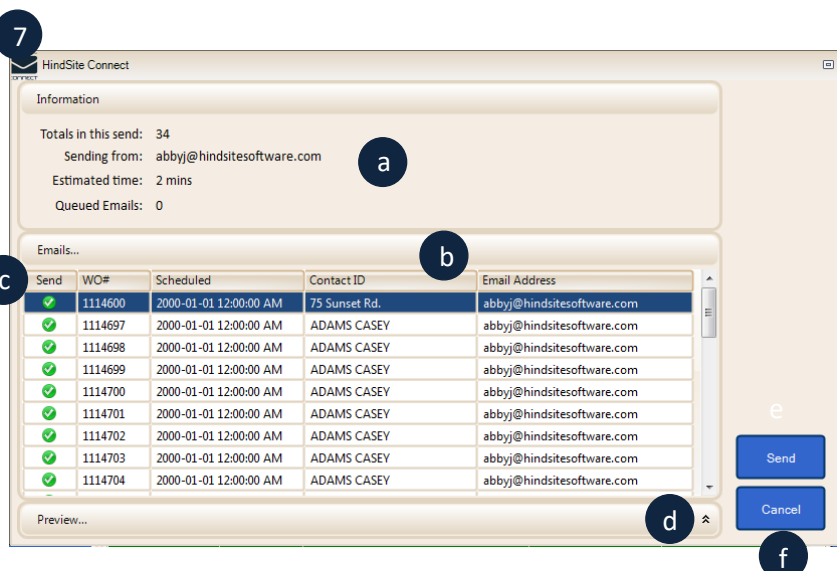
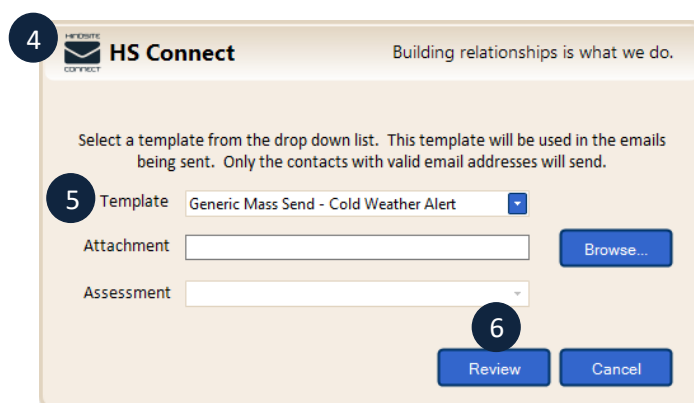
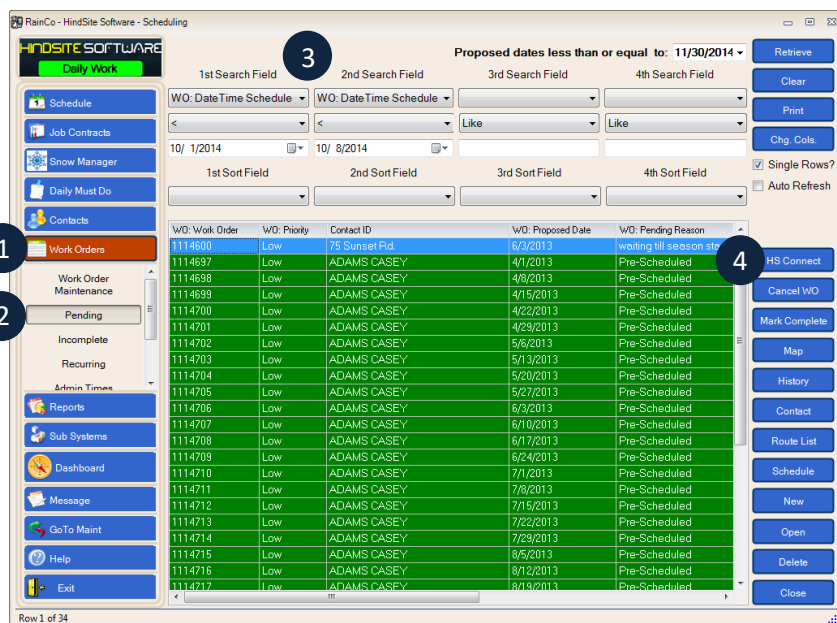
# Mass Email Sends (Pending Work Orders)

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

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

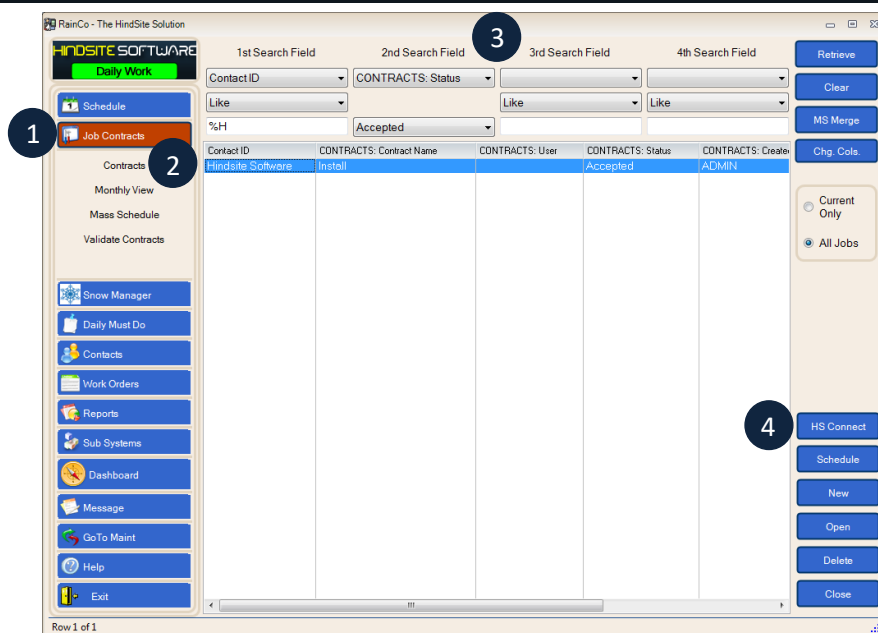




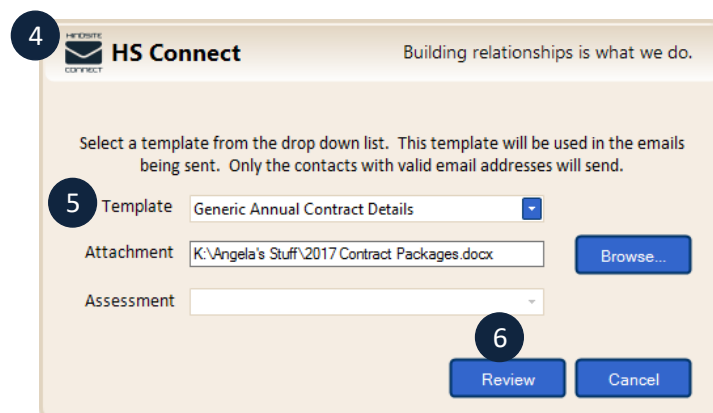
# Mass Email Sends (Contracts)

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

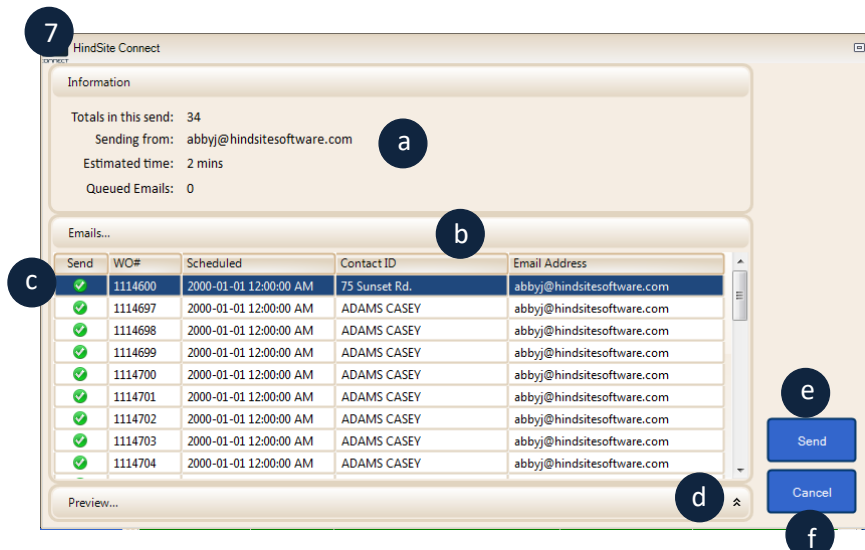
1. Select Job Contracts
2. Select Contracts in the Job Contracts menu
3. Use your search fields to generate a list you would like to send to
4. Select HS Connect. A pop up will appear asking you to select a template



5. Select the template you would like to send to your list (for instructions on sending attachments, jump to page 36)
6. Click Review



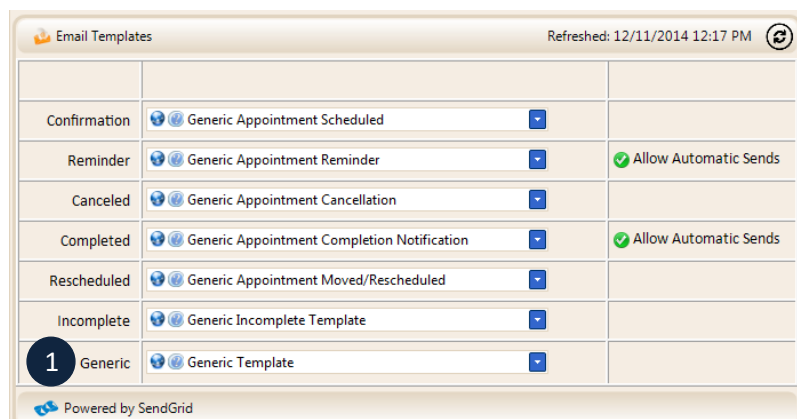
7. A pop up will appear with:
  - a. How many emails will be sent, who the emails will come from, how long the mass send should take, and how many emails are in your Queue
  - b. A list of the contacts that will receive the email
  - c. The ability to not send the email to some of the email addresses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



# 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.**



Confirmation	Generic Appointment Scheduled	
Reminder	Generic Appointment Reminder	<input checked="" type="checkbox"/> Allow Automatic Sends
Canceled	Generic Appointment Cancellation	
Completed	Generic Appointment Completion Notification	<input checked="" type="checkbox"/> Allow Automatic Sends
Rescheduled	Generic Appointment Moved/Rescheduled	
Incomplete	Generic Incomplete Template	
1 Generic	Generic Template	

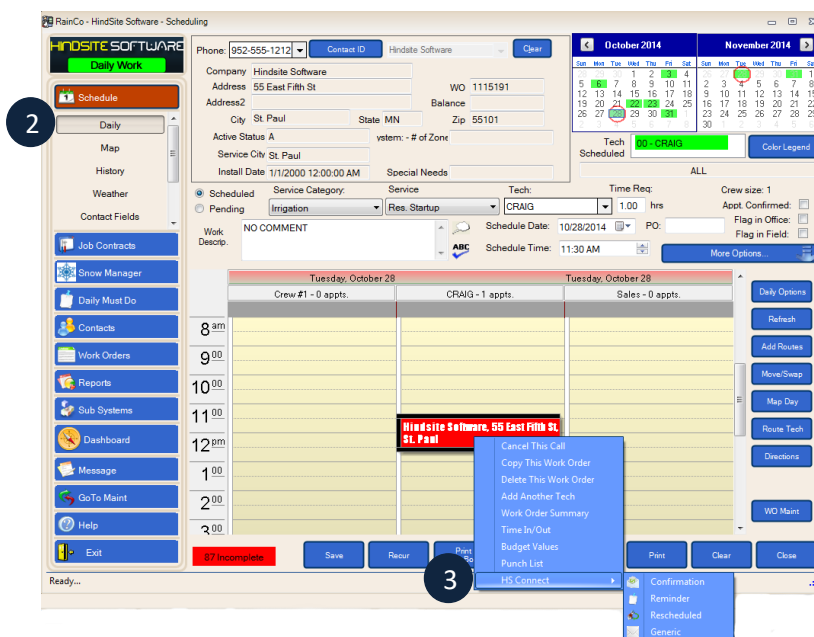
Powered by SendGrid

Email	Email Invoice?	Email Confirm?	Email Remind?	Email Resched?	Email Complete?	Email Cancel?	Email Incomplete?	Email Mass Send?
abbyj@hindsitesoftware.c	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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 one-offs, and you can edit the subject right before sending in HindSite if you leave it blank in SendGrid (See Pg. 36 for details).**



2

3

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

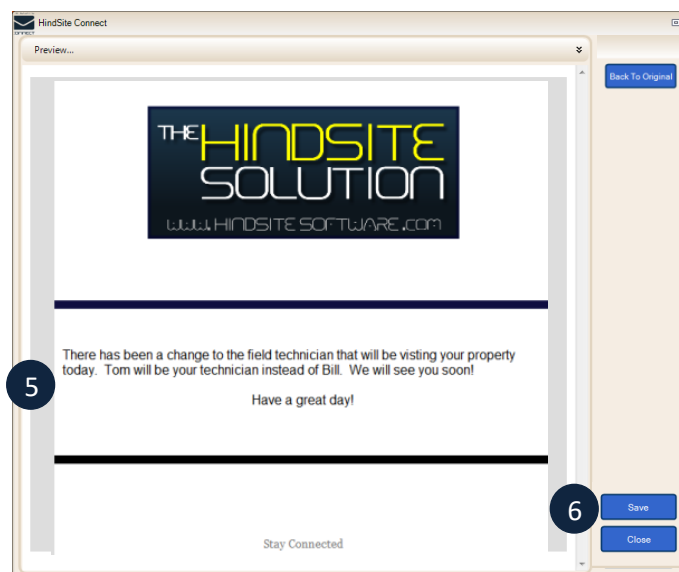


4

## 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.***



# 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.

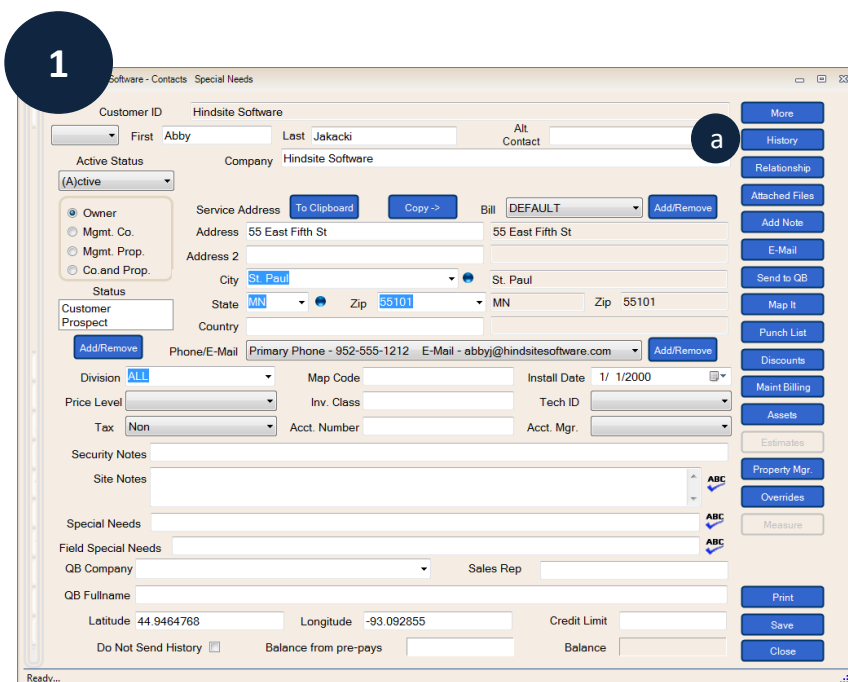
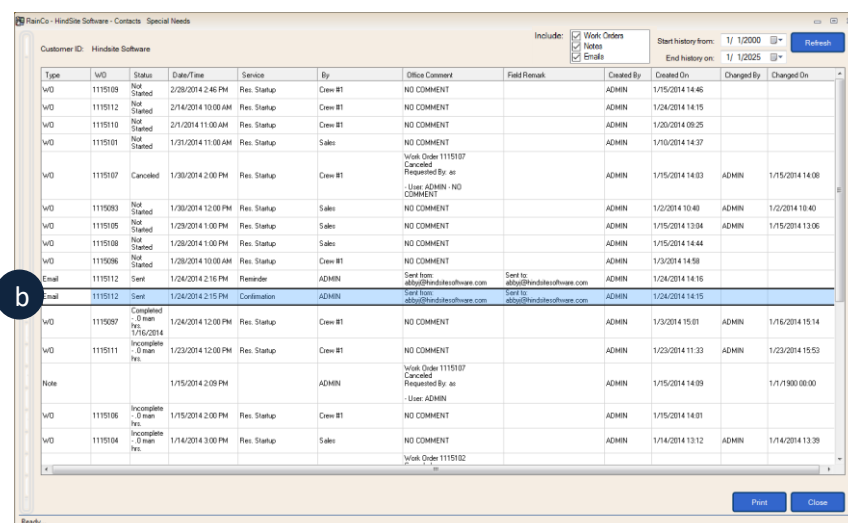
## 1. Open up your contact's information:

a. Click History

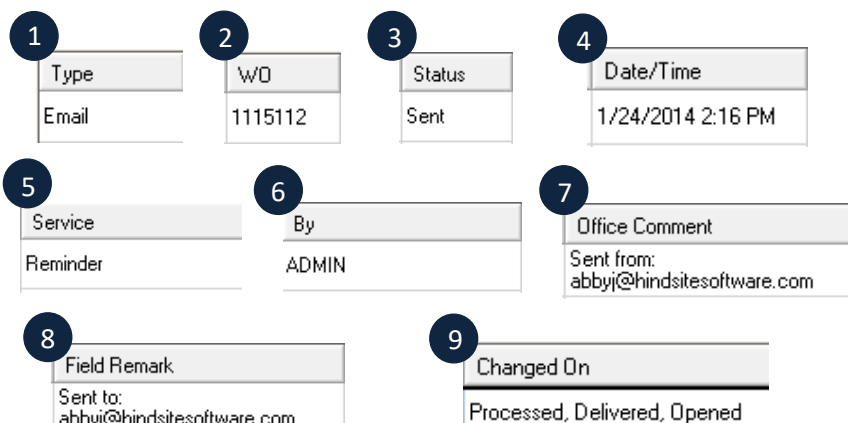
b. The Contact's History will contain:

1. The Type
2. The Work Order associated with the email
3. 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
9. 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.

Type	WO	Status	Date/Time	Service	By	Office Comment	Field Remark	Created By	Created On	Changed By	Changed On
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	1/29/2014 11:00 AM	Res. Startup	Sales	NO COMMENT		ADMIN	1/10/2014 14:37		
WO	1115107	Canceled	1/29/2014 2:00 PM	Res. Startup	Crew #1	Work Order 1115107 Canceled Requested By as - User ADMIN - NO COMMENT		ADMIN	1/15/2014 14:03	ADMIN	1/15/2014 14:08
WO	1115103	Not Started	1/29/2014 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
WO	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		
Email	1115112	Sent	1/24/2014 2:16 PM	Reminder	ADMIN	Sent from: abbyj@hindsitesoftware.com	Sent to: abbyj@hindsitesoftware.com	ADMIN	1/24/2014 14:15		
Email	1115112	Sent	1/24/2014 2:15 PM	Confirmation	ADMIN	Sent from: abbyj@hindsitesoftware.com	Sent to: abbyj@hindsitesoftware.com	ADMIN	1/24/2014 14:15		
WO	1115037	Completed - 0 man hrs	1/24/2014 12:00 PM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/3/2014 15:01	ADMIN	1/15/2014 15:14
WO	1115111	Incomplete - 0 man hrs	1/23/2014 12:00 PM	Res. Startup	Crew #1	NO COMMENT		ADMIN	1/23/2014 11:33	ADMIN	1/23/2014 15:53
Note			1/15/2014 2:00 PM		ADMIN	Work Order 1115107 Canceled Requested By as - User ADMIN		ADMIN	1/15/2014 14:09		1/1/1980 00:00
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 hrs	1/14/2014 3:00 PM	Res. Startup	Sales	NO COMMENT		ADMIN	1/14/2014 13:12	ADMIN	1/14/2014 13:39



- Type: Email
- WO: 1115112
- Status: Sent
- Date/Time: 1/24/2014 2:16 PM
- Service: Reminder
- By: ADMIN
- Office Comment: Sent from: abbyj@hindsitesoftware.com
- Field Remark: Sent to: abbyj@hindsitesoftware.com
- Changed On: Processed, Delivered, Opened

# 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:

1. **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.
3. **Opened** – The contact has opened your email.
4. **Clicked** – The contact has clicked a link within your email.
5. **Unsubscribed** – The contact has clicked the unsubscribe link within your email. The contact will no longer receive your emails.
6. **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.
7. **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.
8. **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.
9. **Spam** – The recipient or their email server marked your email as Spam or Junk. The contact did not receive the email with this status.

Changed On	
1	Processed
2	Delivered
3	Opened
4	Clicked
5	Unsubscribed
6	Dropped
7	Deferred
8	Bounced
9	Spam

## 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:

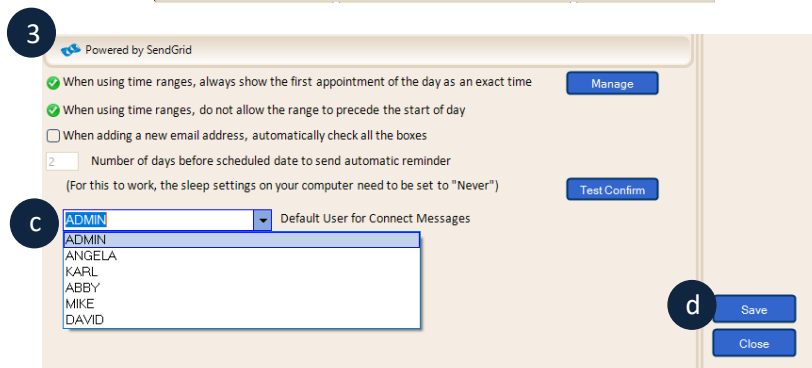
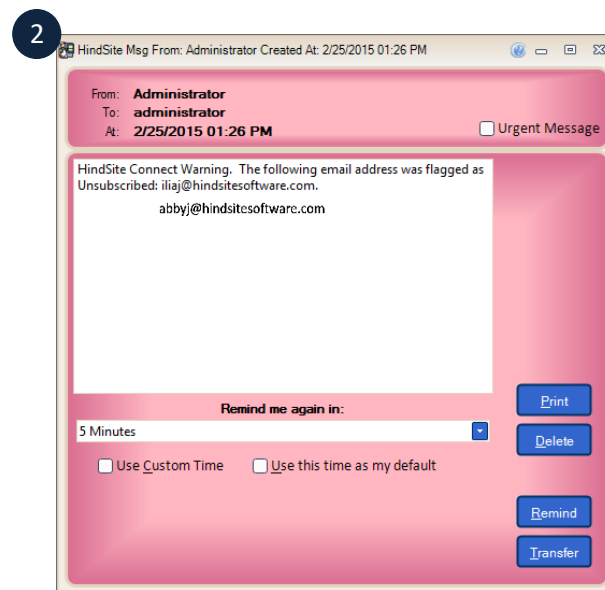
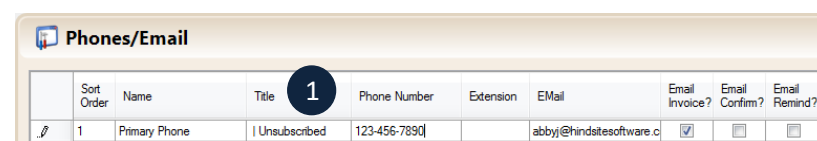
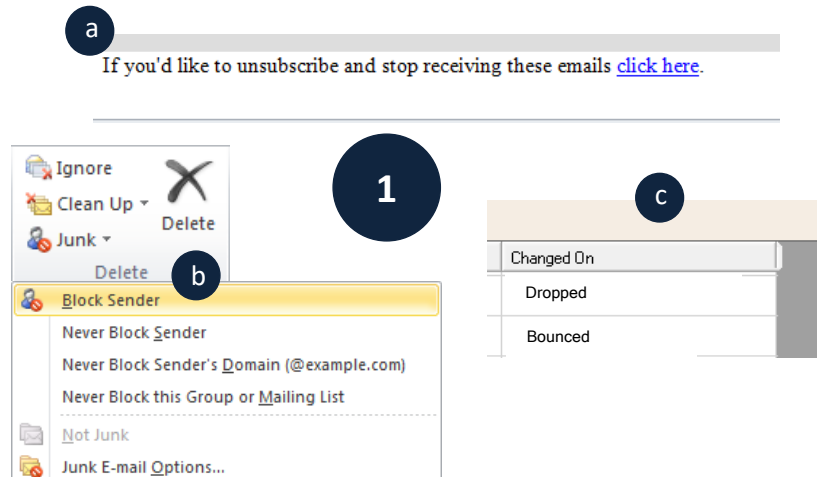
1. If your contact:
  - a. Unsubscribed from your email
  - b. Marked you as spam
  - c. Has an email with the status of dropped or bounced

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.**

2. 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:"

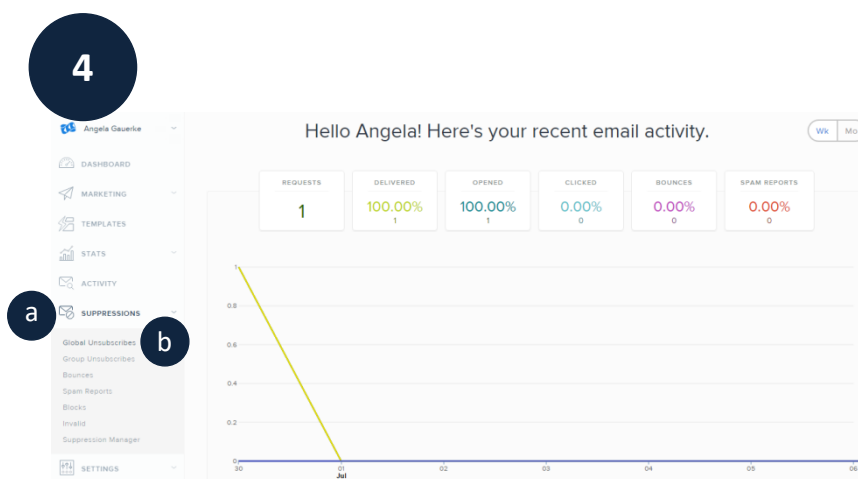
3. To determine who gets HindSite Connect related Pink Messages:
  - a. Go to Application Setup
  - b. HS Connect
  - c. Select the default user you wish to have receive the Connect Messages from the drop down
  - d. Click Save



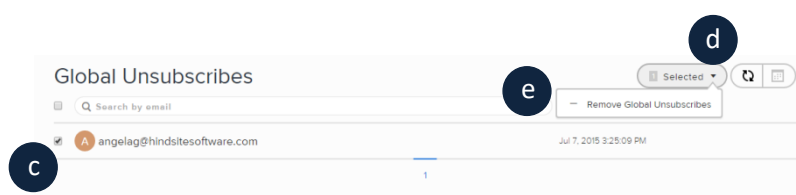
# Email Statuses Cont...

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

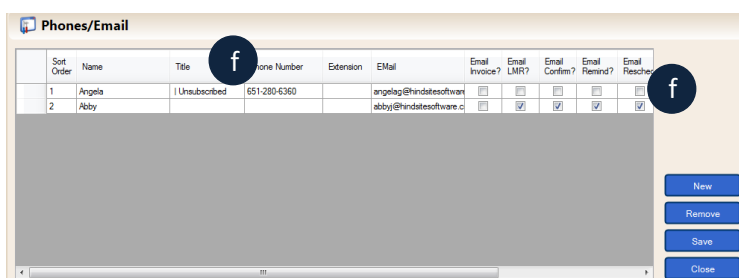


- c. Select the checkbox to the left of the email address you would like to re-subscribe
- d. Click the Selected tab in the top right corner
- e. Click Remove Global Unsubscribes



- f. In HindSite you will need to delete out the "| Unsubscribed" text in the contact's Phone/Email Title field 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.**



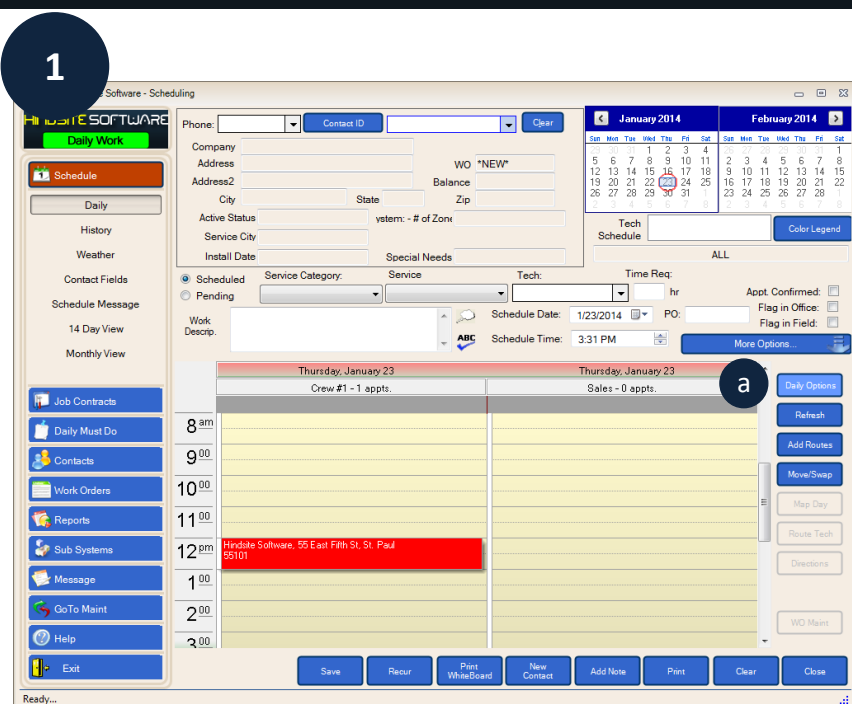
Sort Order	Name	Title	Phone Number	Extension	Email	Email Invoice?	Email LMR?	Email Confirm?	Email Remind?	Email Resch?
1	Angela	Unsubscribed	651-280-6360		angelag@hindsitesoftware.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Abby				abby@hindsitesoftware.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



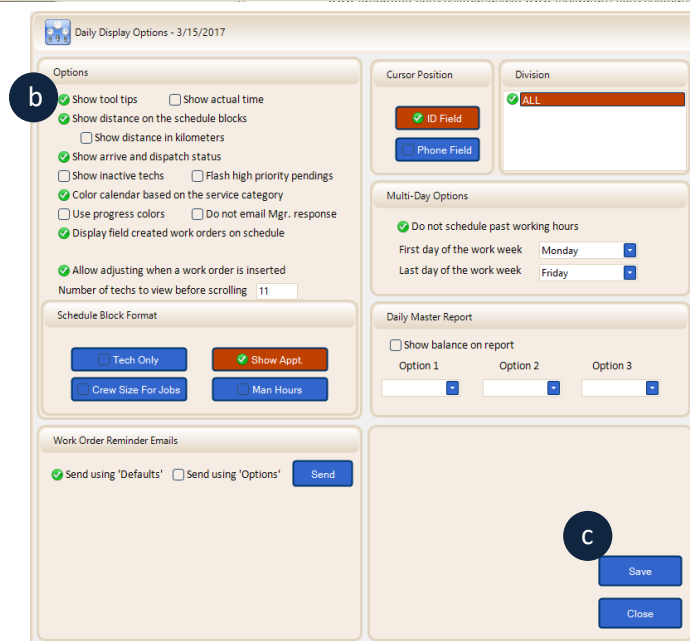
# Emails Sent via Scheduling View

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

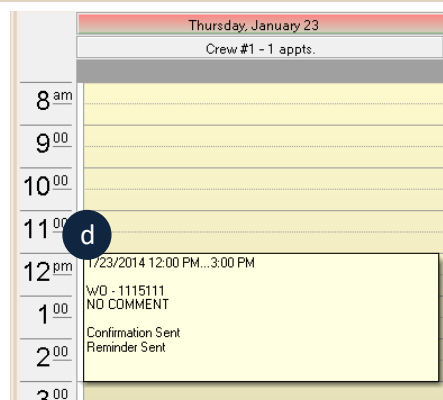
1. First ensure your settings allow you to have this view. On the Daily Screen:
  - a. Click Daily Options



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



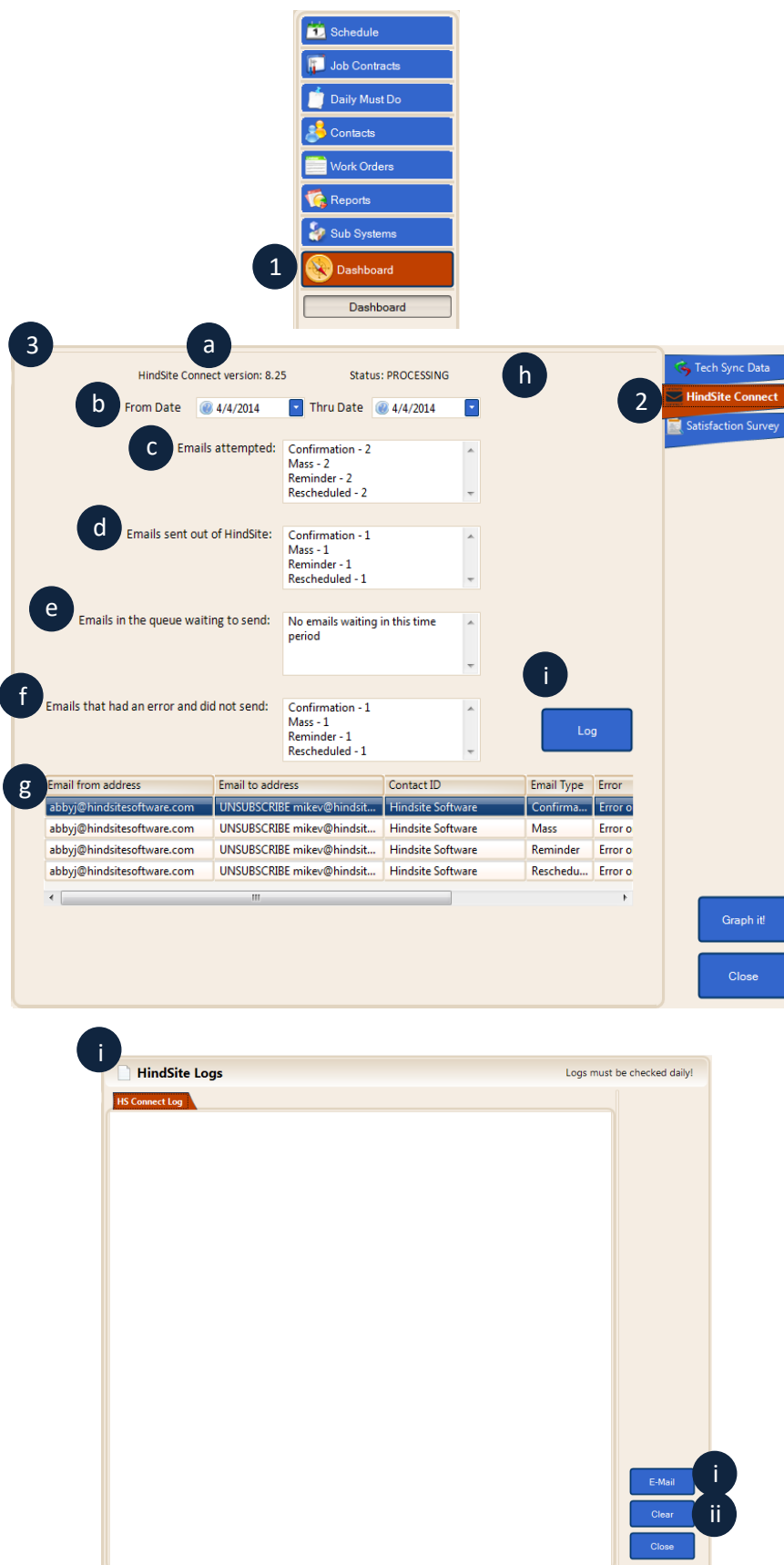
- d. When you hover your mouse over the work order, you will be able to see which emails have been sent for that particular work order.



# 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
    - i. 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)



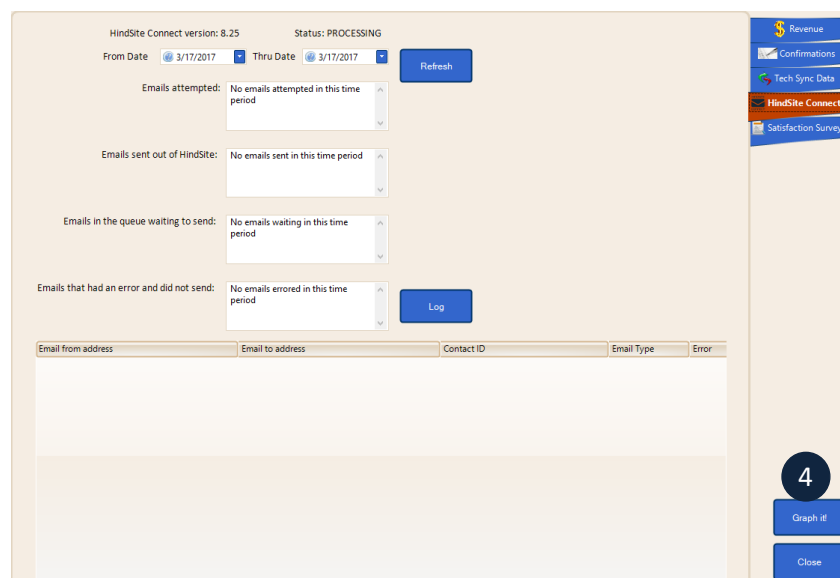
The screenshot shows the HindSite Connect Dashboard and its associated logs. The dashboard is titled 'HindSite Connect version: 8.25' and 'Status: PROCESSING'. It features a sidebar with navigation links: Schedule, Job Contracts, Daily Must Do, Contacts, Work Orders, Reports, Sub Systems, and Dashboard (highlighted with a red circle '1'). The main content area displays email statistics for the date range 4/4/2014 to 4/4/2014. It includes sections for 'Emails attempted', 'Emails sent out of HindSite', 'Emails in the queue waiting to send', and 'Emails that had an error and did not send'. A table at the bottom lists email details with columns for 'Email from address', 'Email to address', 'Contact ID', 'Email Type', and 'Error'. The 'HindSite Logs' window is also visible, showing a list of logs and buttons for 'E-Mail', 'Clear', and 'Close'.

Email from address	Email to address	Contact ID	Email Type	Error
abbyj@hindsitesoftware.com	UNSUBSCRIBE mikev@hindsit...	Hindsite Software	Confirma...	Error o
abbyj@hindsitesoftware.com	UNSUBSCRIBE mikev@hindsit...	Hindsite Software	Mass	Error o
abbyj@hindsitesoftware.com	UNSUBSCRIBE mikev@hindsit...	Hindsite Software	Reminder	Error o
abbyj@hindsitesoftware.com	UNSUBSCRIBE mikev@hindsit...	Hindsite Software	Reschedu...	Error o

# HindSite Connect Dashboard Cont...

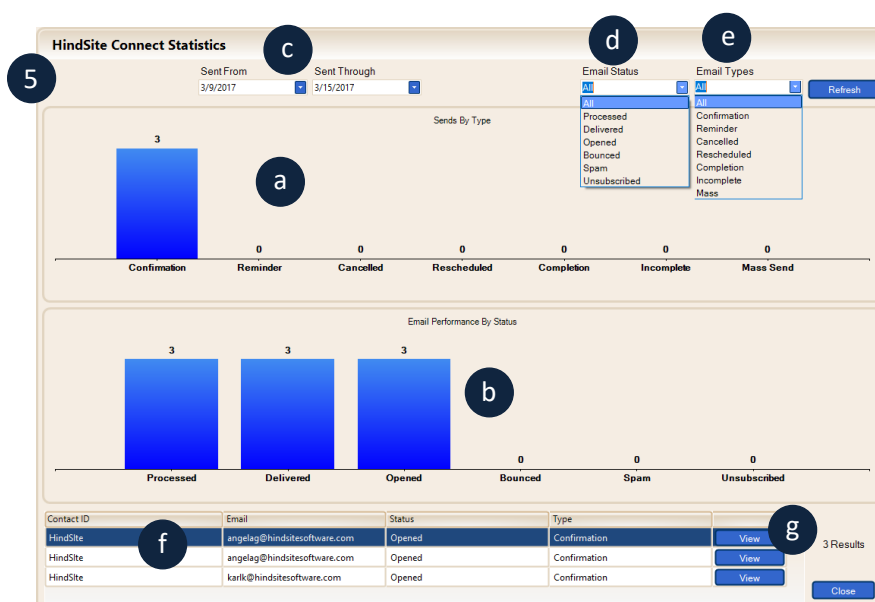
The HindSite Connect Dashboard also includes visual statistics into the performance of your emails.

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



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:

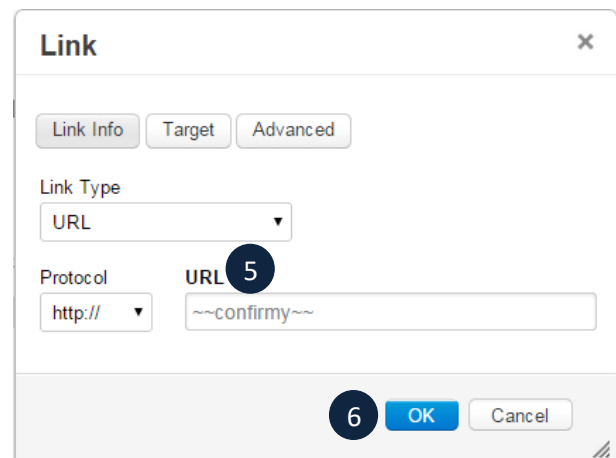
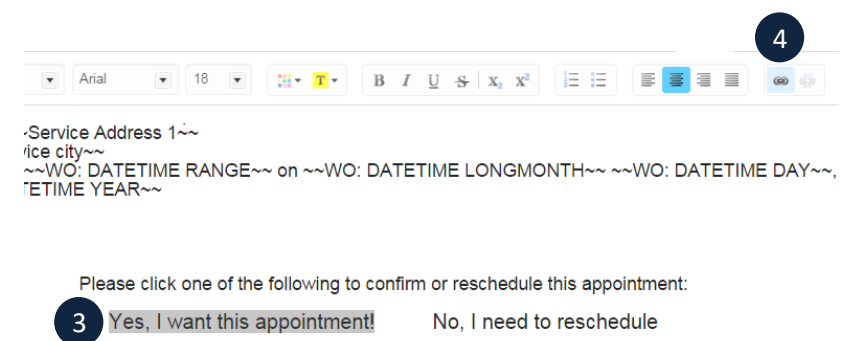
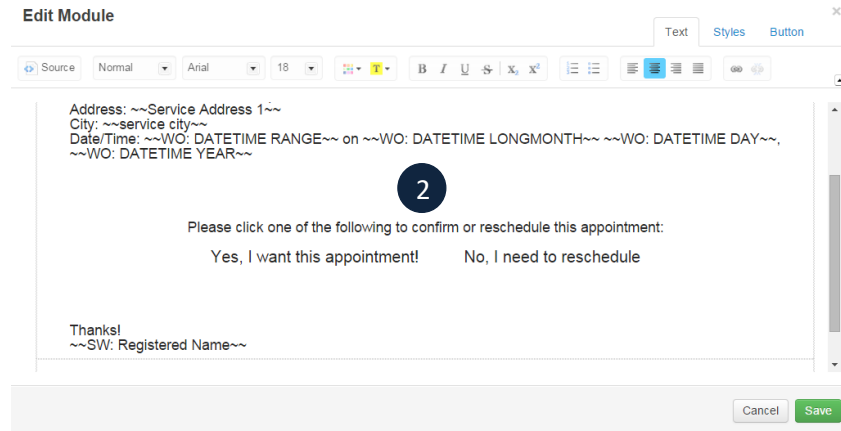
1. The following codes can be used to create links that customers can click on to confirm or reschedule their appointment. They must be inserted as hyperlinks:
  - a. Confirm: `~~confirmy~~`
  - b. Reschedule: `~~confirmn~~`

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.
5. 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.
6. 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.

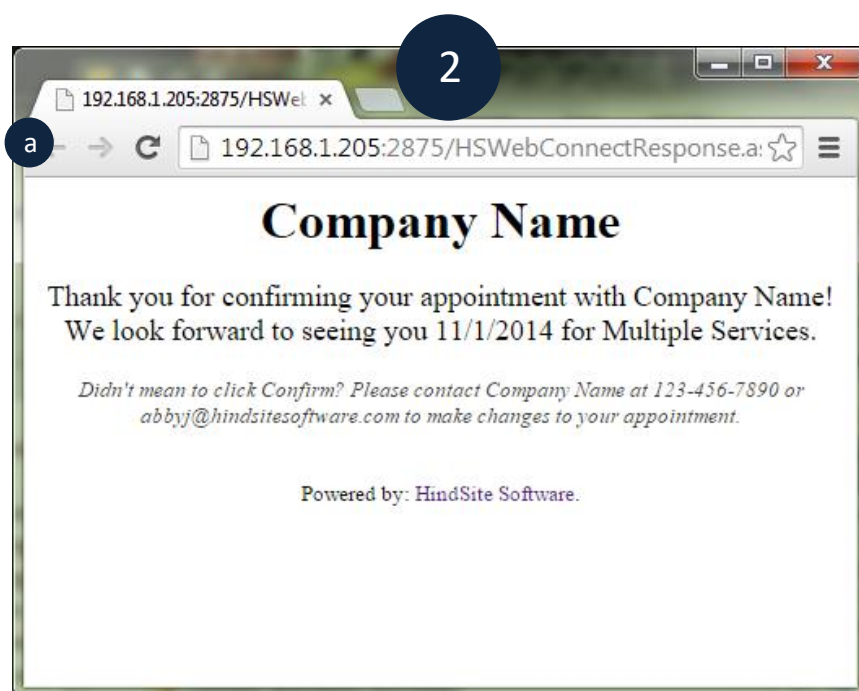
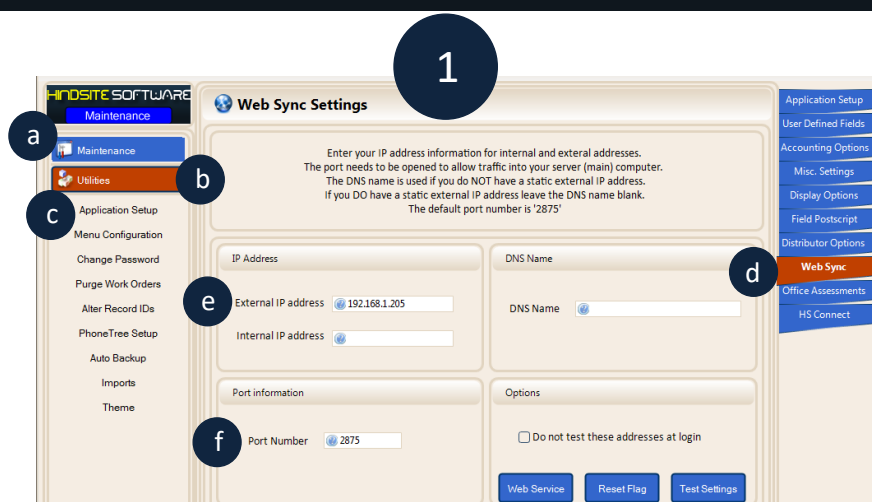


# Confirmation and Reschedule Links in Emails (HindSite)

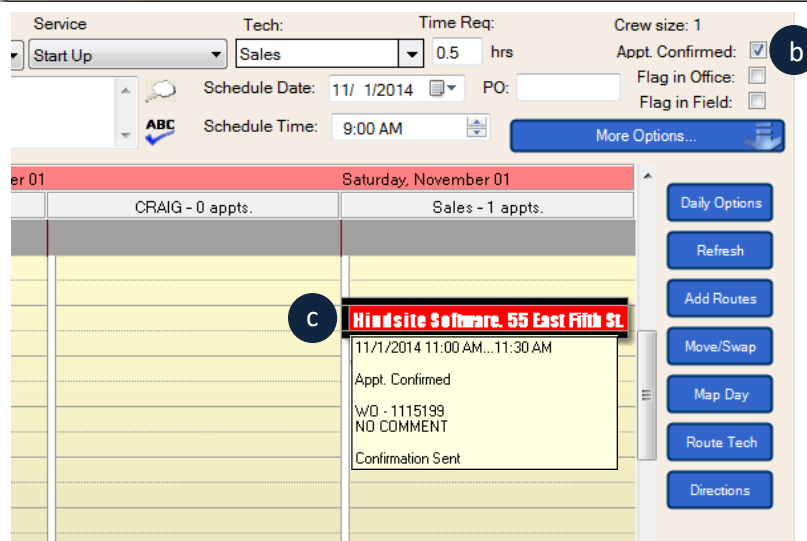
You have the ability to include links in your emails that allow your customers to confirm or reschedule an appointment. Here is how to set up your HindSite:

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'.



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

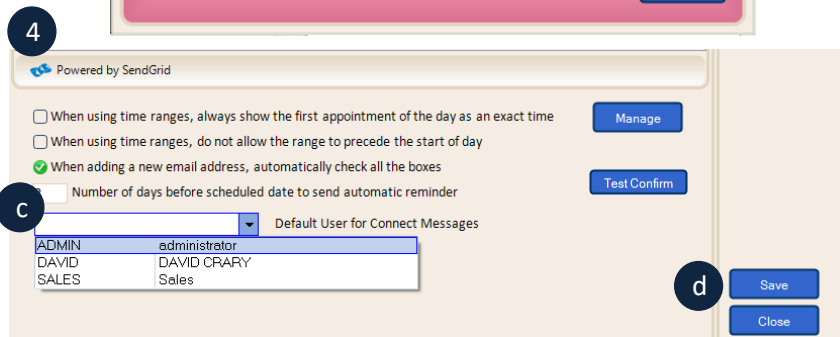
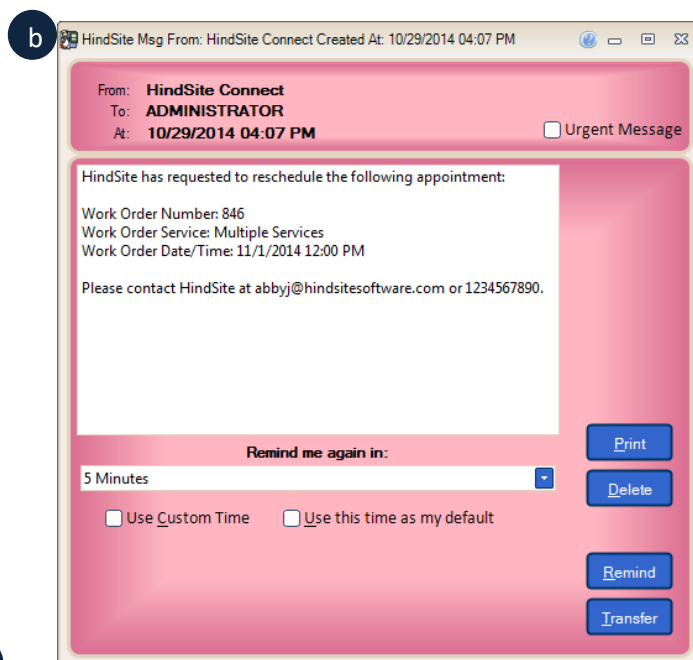
3. When a customer clicks the reschedule link in your email, two things will happen:
  - a. They will be taken to a webpage that contains the following message
  - b. The Default User for Connect Messages will receive the following Pink Note:
 

"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
  - c. Select the default user you wish to have receive the Connect Messages from the drop down
  - d. Click Save





# Emailing Attachments

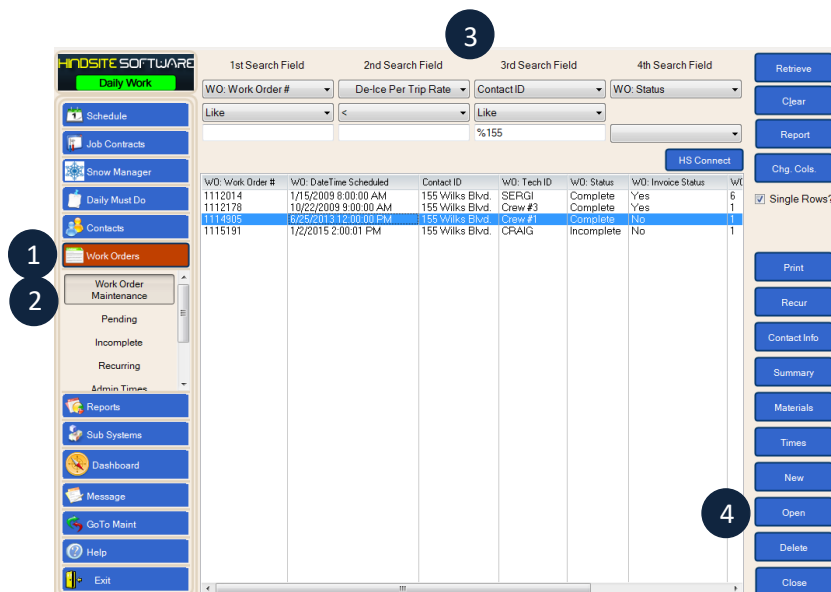
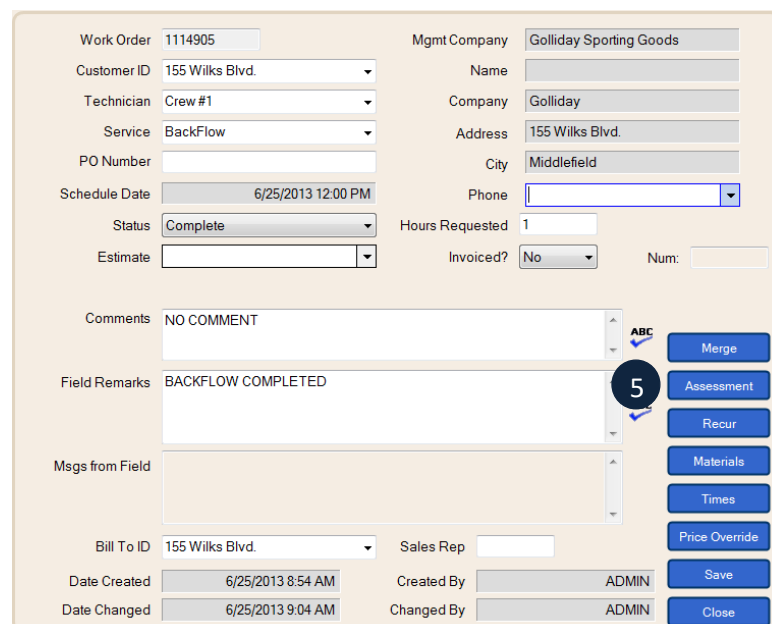
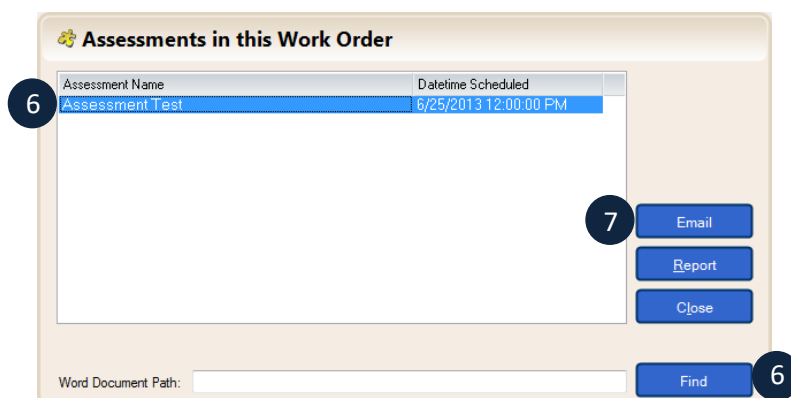
HindSite Connect offers you the ability to include any type of attachment with your email sends including Assessments, custom Word Merge docs and generic PDFs. First, let's cover Assessment & Word Merge attachments.

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
3. 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
6. 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)

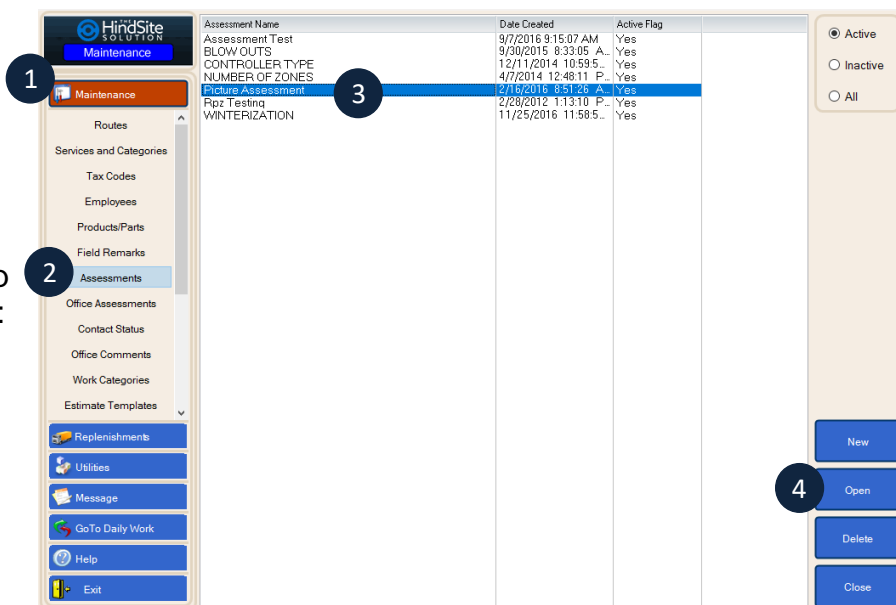






# Emailing Attachments Cont...

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

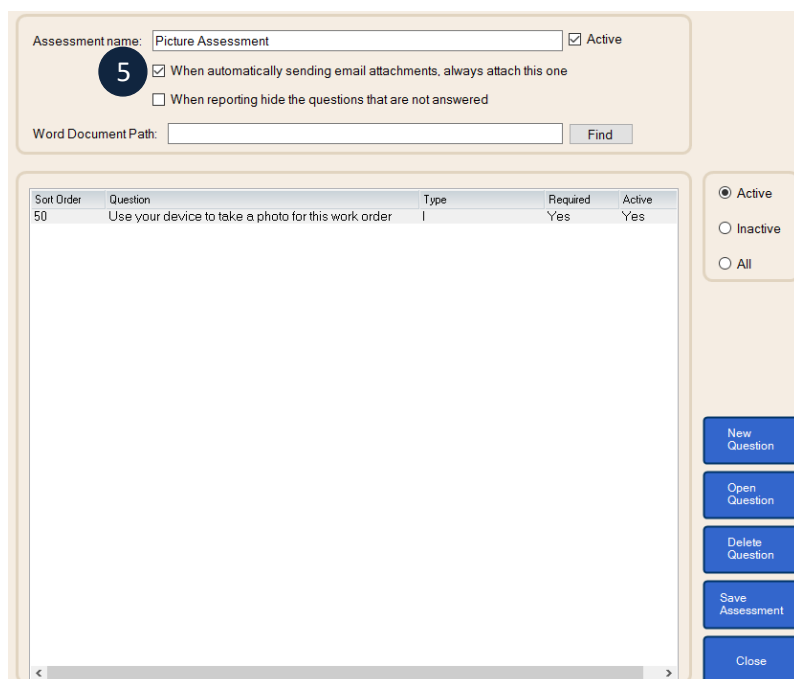


On the Assessment page:

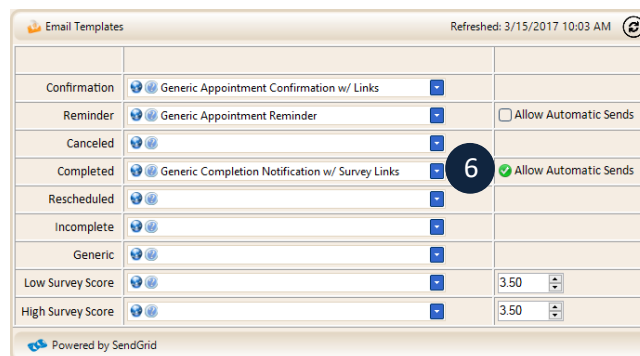
5. Check the box: "When automatically sending email attachments, always attach this one"

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.



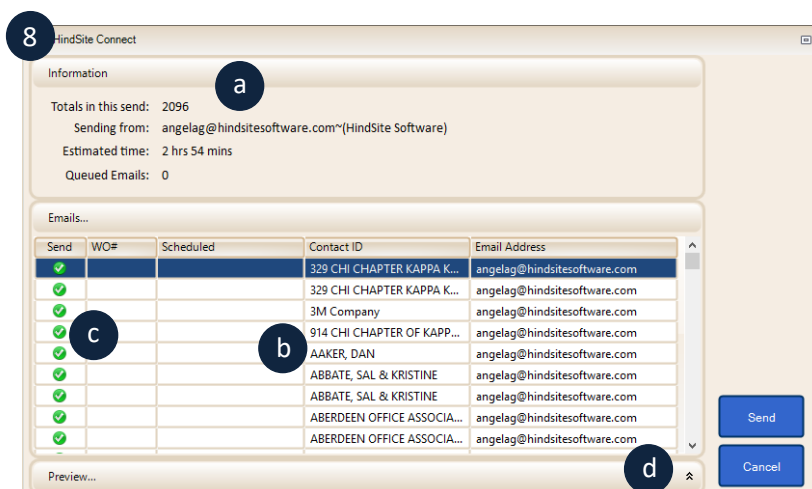
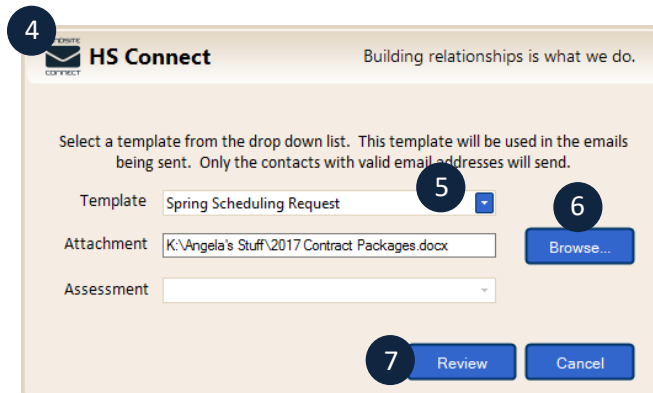
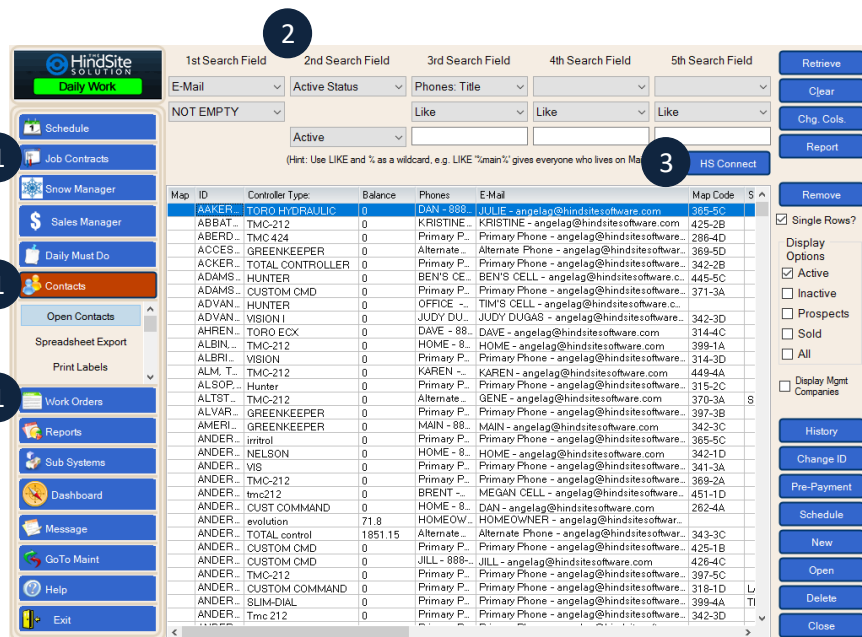
6. **\*Please Note: No completion emails will send automatically unless the checkbox is marked to "Allow Automatic Sends" under Application Setup > HS Connect.**



# 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
2. 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:
  - 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



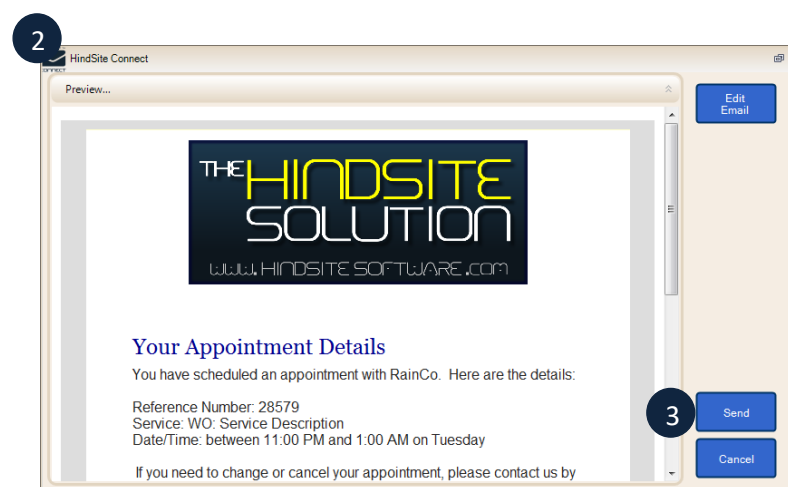
# Editable Subject Lines

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:

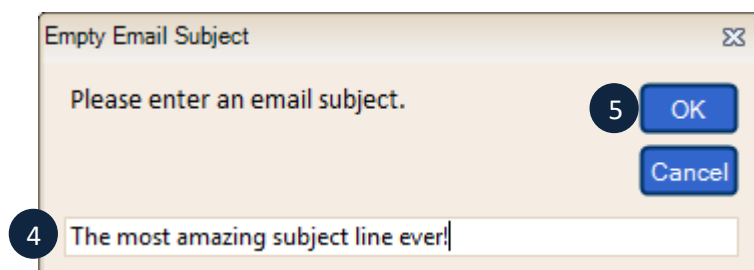
1. You must first ensure the subject of the email template is left blank in SendGrid



2. In HindSite, pull up an email to send as you normally would
3. 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



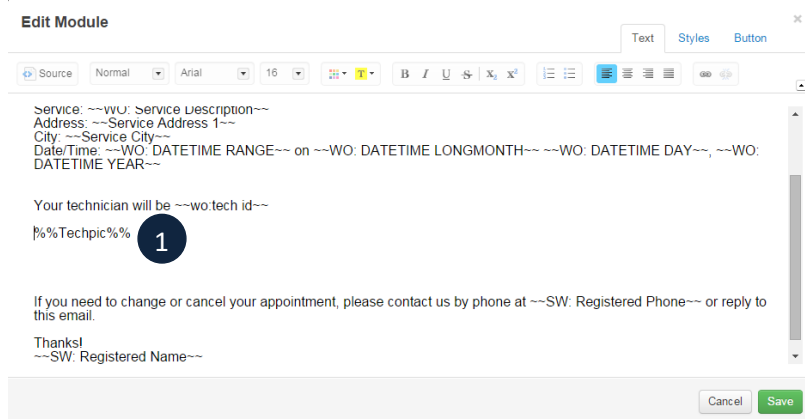
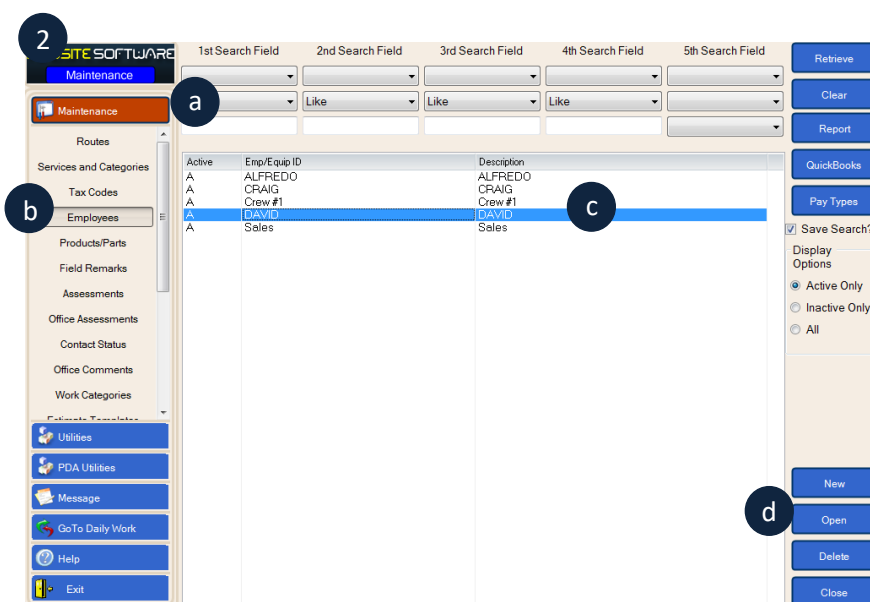
# Adding an Employee's Picture

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:

1. 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.

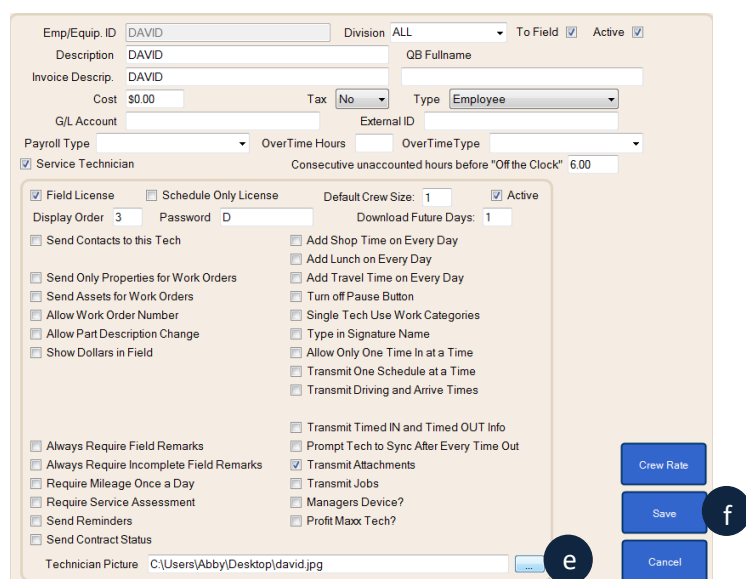
**Please Note: Here are a few disclaimers about employee pictures:**

- 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.

1st Search Field	2nd Search Field	3rd Search Field	4th Search Field	5th Search Field
Like	Like	Like	Like	

Active	Emp/Equip ID	Description
A	ALFREDO	ALFREDO
A	CRAIG	CRAIG
A	Crew #1	Crew #1
A	DAVID	DAVID
A	Sales	Sales



# 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:

- [HindSite Connect FAQs](#): 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.
- [Setting Up Templates for HindSite Connect](#): Learn how to create and edit templates in SendGrid to use with HindSite Connect.