Email Marketing

The Email Marketing and Tracking functionality lets Agiloft customers setup email marketing campaigns and track useful information such as the number of emails opened, the number of bounced emails, the number and details of hyperlinks clicked and by whom, and the number and identity of unsubscribers.

In general, the tracking makes the most sense only when separate emails are sent to a single address for each record in a table. By default, Agiloft KBs are configured to use Email Marketing for the Leads and the Contacts tables because these tables hold records for each individual who might receive mass emails. Emails are linked to the Campaigns table in the default configuration.

In contrast, emails sent on process tables, such as the Support Case or Change Request table, are often sent to multiple individuals. If a single email is sent to multiple people, the actions taken by any of those persons on that email would be reflected in the statistics, but only once. This means that if two recipients open the same email, it only counts as one "open" and there is no way to know which user performed the action.

Setting up Email Marketing for a Table

To set up email marketing for a table, you must configure the following items:

- Enable Email Marketing
- Bounced mail handling
- Outbound email behavior
- Email dialog options

Enable Email Marketing

Email marketing is enabled on a per-knowledgebase basis in the Admin Console, and then enabled for each table in Outbound Email Settings.

Enable Email Marketing in the Admin Console

If it has not been enabled, follow these steps in the Admin Console:

1. Go to **Setup > Knowledgebases**.
2. Select the KB.
3. Go to the Options tab.
4. Select the relevant option for linking emails and campaigns:

- Create Campaign Table. This adds the Campaign table to the knowledgebase.
- Use another table for campaigns. Select the table to use from the drop-down list.
- Do not add fields or a table for campaigns.

5. Click Finish. The screen confirms that the EM infrastructure has been added.

Enable Email Marketing in the Knowledgebase Table

Once the knowledgebase has the email marketing structures defined, marketing must be enabled for the tables you wish to use.

1. Click the **Setup** gear in the top-right corner and go to **Email and SMS > Configure Outbound Email**.
2. Select the table and go to the Marketing tab.
3. Under Enable Email Marketing on this table?, select Yes.
4. Configure the additional options. For more information, see Outbound Email Settings.
5. Click Finish.

Bounced Mail Handling

The first step to manage bounced mail is to configure an inbound account to receive the bounce reports. Tracking of bounced emails can be set up for any table without setting up Email Marketing. It is not dependent on the marketing function. It may be used in your process tables on the working inbound email accounts that are used to create or update records. Go to **Setup > Email > Configure Inbound Email**. If there is not already an inbound account for the table, create a new account.

There are some requirements for this tracking to work. In order to capture bounce email replies, you must:

- Set up a valid inbound email account on the Leads table.
- Use that account as the Reply To address in your outbound marketing emails.

This means that if you email a lead and they reply by email, they will be replying to this address and the system, not directly to your individual sales representative. While this has the benefit of capturing all communications in the system, it may not be the way your sales team is used to working.

There are a couple of options for how this might be handled:

    - The first and simplest is to use a salescomm@yourcompany.com address as the Reply To address, and on the Email Updates tab of the inbound settings, map the content of the reply to go into an append only field in the lead record. Sales Comments will work, or you can create another field specifically to hold lead updates via email.
        - Then, you can create a rule on the Leads table that runs on edits by email that sends the latest entry in the mapped field to the assigned sales representative by email, so they receive the customer's comments as if they were the original recipient.
    - Another option is to use an inbound account that all sales representatives can set up and pop in their own email system, for instance Outlook or Exchange, so they all get copies of all email replies or bounces by all leads. In this case you could choose whether or not to also map the content of the update to the lead record.

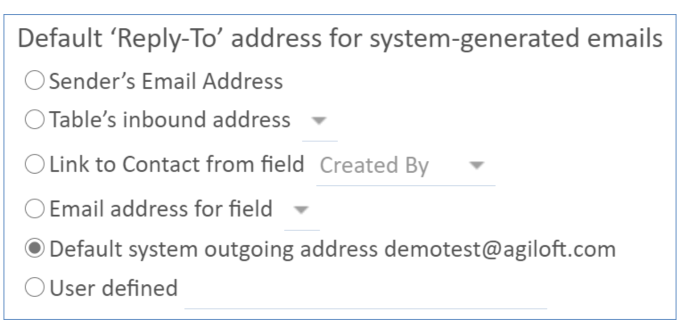
Whichever method you choose, if you want to capture bounces, you need to configure at least one inbound account. If you choose the first option above, follow this setup:

1. On the Access tab, clear the "Enable creation of records by email" checkbox and choose a user for unknown updates. Make sure the user has permission to update the relevant field in the Leads table. You might create a special user for that purpose so you can trigger email rules off the updater login.
2. Navigate to the Filters tab and set up the bounced email options.

Outbound Email Behavior

Next, configure outbound email behavior:

1. Go to **Setup > Email > Configure Outbound Email**.
2. Select the Leads table.
3. Give the appropriate groups the ability to create new emails for this table. The From address can be whatever email address you want, but both options for the default Reply To address (for system-generated and user emails) should be set to the new inbound account. Otherwise, the system doesn't receive the bounce emails and can't report on them.



Reply To settings

To Options Tab

There are a couple of important options on the To Options tab:

- Include ID in Subject should be selected, to make sure the correct record is updated by any replies.
- "Send same email to all recipients" should never be selected for marketing emails.

The default setup of the Leads table checks the box to exclude the encrypted ID from the subject line of the email to make it less apparent that the contact is receiving a bulk email. The encrypted ID is always included in the email header and can be used to identify the record to be updated if the user replies, provided that their email program or server does not strip it out of the email header.

MS Exchange strips out such headers for internally sent emails, but most other programs do not. However, you must weigh the risk of not also including the ID in the subject line. If a lead replies to an email back to the system and the ID is missing, the system creates a new lead record if permitted, based on whether you have enabled creation by email in the option shown above.

The option to "Send same email to all recipients" is not compatible with email marketing tracking. If it is selected and you choose one email to send to 100 leads, all 100 emails are sent with the same tracking code, and responses can't be counted appropriately.

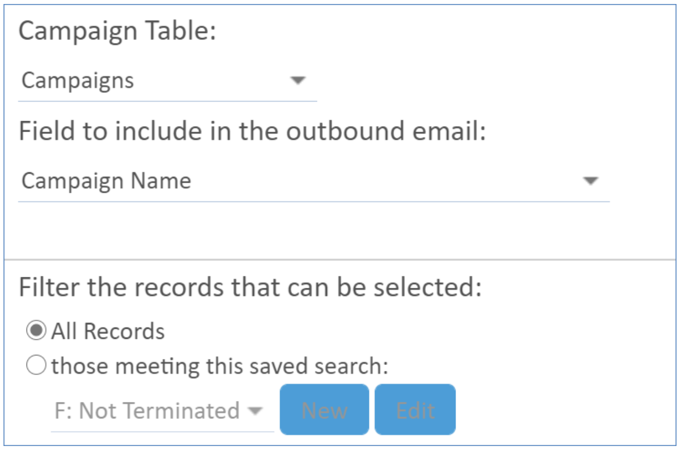
Marketing Tab

Most of the tracking configuration is done on this tab. Your company's Mailing address can be included by default, as well as an Unsubscribe link.

If you enter a company address, it is placed in the email below the Unsubscribe text. The system does not require an address here, but it is a legal requirement when sending unsolicited email. The ExitURL defines where to take users to confirm they have unsubscribed after clicking the Unsubscribe link. This can be any URL. If you don't want to create your own page, we have a simple page available for use at: www.agiloft.com/unsubscribe.htm

The default Leads table includes the Opt Out field for tracking opt-outs by leads, and you can also choose to set a field value when processing unsubscribes. The Opt Out field can be selected automatically when the unsubscribe link is clicked. If you select an Additional Unsubscribe field, its choices or input aid will then appear for you to select the appropriate value.

The Campaign option allows you to link a mass outbound email with a particular campaign to collect its statistics. You should select the table you chose to use for the campaign table when enabling the marketing email upgrade, as that will be the table which holds the statistical fields. By default, this is the Campaign table that is included out of the box.

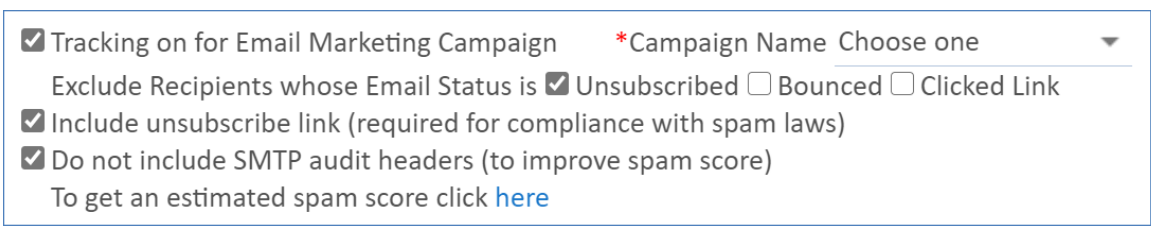


Campaign Table settings

If desired, you can use a saved search to show only active campaigns. The drop-down list of campaigns is then filtered by the saved search.

Email Dialog Options

Once Email Marketing has been enabled for a table, you can access the additional marketing options on the Options tab when you compose an email in Agiloft. If you chose to include tracking by default on the Email Marketing tab of the Outbound Email Wizard, the dialog has these options selected:



Tracking options in email editor

Use the drop-down list next to Campaign Name to find the campaign and select it. You can automatically exclude leads who have unsubscribed or bounced previously, and you can choose whether or not to include the unsubscribe link and audit headers.

It is very important to select a campaign if you want to be able to track statistics for the emails. If you forget to select one, you can mass edit the sent emails and link them to a campaign, but any bounces or responses sent before your edit can't be captured and might lead to inaccurate reporting.

Additionally, Collate Results should be set to No. There is another Collate Results option in the Options tab of the email editor.

This kind of collation is appropriate for escalation emails that find multiple records and send them to the Assigned To, or to some teams of users. It is not appropriate for mass marketing emails and should always have the default value of No for the results to be correct. For more information, see Email Options.

Troubleshooting Email Marketing Errors

If the Campaigns table statistics aren't accurate, make sure the emails were linked to a campaign. If they weren't, you can mass edit the emails to link them to a campaign, but any bounces or responses that were already sent can't be captured retroactively. This also doesn't update the number of sent emails for the campaign, which is recorded at the time of sending.

It is possible to run an action to update the total count and the percentages whenever such a correction is needed. A recalculation action button is included in the default out-of-the-box configuration for this purpose. If you don't have the action button or you deleted it, you can create the button and update actions manually. The actions update the Number of Sent Emails and Calculated Number of Sent Emails(recalculate) fields.