

# Automated Email Tracking

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Email marketing includes automated tracking for:

- Emails opened by recipients
- Bounced and undelivered emails
- Links clicked within emails
- Requests to unsubscribe

## Emails Opened by Recipients

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When tracking is enabled, Agiloft embeds a one-pixel image in the body of the email. When a recipient opens the email, this image is requested from the server and each request for this image is tracked. This is the standard way most email marketing software tracks the number of emails that have been opened by recipients.

When an email is successfully captured as opened:

- The Email Status field in the email is updated to Opened
- The Opened value is selected in the Email Activities field
- The Last Email Status Update field is updated to the current date and time in the Email record
- The fields in the Campaigns record that include a count of number of opened emails are incremented by 1
- The Email Status field in the record from which the email was sent is also updated to Opened

## Limitations

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This methodology is unfortunately inherently unreliable, as Outlook and many other e-mail clients do not download images from unknown senders by default. If the image file is not loaded when the email is opened, there no request for the image file is sent to the server, and it isn't possible to track whether the email was opened. This is a problem faced by all standard email marketing software and unfortunately cannot be avoided.

Having a trusted relationship with the people you market to makes it more likely that they have enabled images from your company in previous emails, or that they might download pictures for your marketing emails to see what you have to say.



Using this technique can lead to warnings from the email client. To disable email marketing image tracking, edit the [Disable Marketing Email Image Tracking](#) global variable.

# Bounced or Undelivered Emails

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Another tracking challenge is to capture bounced or undeliverable emails. Bounce emails are sent back to the return-path address when an outbound email is rejected by the receiving server. This necessitates setting up an inbound account that captures this information, as described in [Email Marketing](#).

When a bounced email is received by the inbound account:

- The original outbound email is marked as defined in the inbound email settings, and depending on your inbound configuration, the information might also be forwarded to a specific person or team.
- If you chose the default configuration for bounced emails, the Email Status field is set to Bounced.
- The integer field tracking the number of bounced emails in the linked campaign is incremented by one.
- The specified Email Status field for the record from which the email was sent is also set to Bounced.

Once the Email Status of an email recipient has been marked as bounced, they are automatically excluded by default unless you disabled the option to exclude previously bounced addresses.

# Clicked Email Links

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Agiloft can track the links clicked by a recipient in an email they receive, including both normal URL hyperlinks and Agiloft hyperlinks. When email marketing is turned on, any hyperlink that is included in an email within a command is formatted with some additional code that makes that URL a redirect from the Agiloft server, so that the click can be tracked.



Make sure all links in marketing emails are coded as links in HTML. If you simply insert the text for a hyperlink in the body of your email without enclosing it in an HTML "`a href`" link, as in adding the text "[www.agiloft.com](http://www.agiloft.com)", while the mail client may still display it as a link that can be clicked, the link clicks cannot be tracked.

Whenever a link is clicked, the information is passed to the Agiloft server and a new record is created in the Email Clicks table. The Email Clicks record contains the actual URL the link redirected to, the linked campaign, a link to the source record from which the email was sent, and links to other fields in the outbound email - the Lead Name, Email, and so on. It is also possible to add other fields to this table and populate them using a default value or rules to get more information into the records.

The Email Click records are shown as an embedded table within the source tables, so you can see all the links a particular lead or a particular contact clicked within their contact record. They are also shown within the campaign record, so you can see the links that were most popular for a particular campaign.

The Email Clicks table is configured by default to link to the source Lead or People record, using a field called Source Record ID. This field is of the type "link to single field from multiple tables". If you have other tables from which you plan to send marketing emails, you should edit this field to add those tables and their ID field. That way, the system can track the source record for your own tables as well.

In addition to creating the Email Click record, the system updates the Email Status fields in the Email table and in the People or Lead table from which it was sent to Link Clicked and increments the number field counting clicked links in the campaign. In a given campaign, it is possible to have a larger number of Email Clicks than the number of sent emails, because there may be multiple links in a single email and users may click on more than one link. Any link they click is represented by a separate Email Click record, while the field called Number of Recipients who Clicked links is limited to only one count per email.

## Unsubscribe Requests

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The CAN-SPAM Act of 2003 states that a person or company may be sued or fined for sending unsolicited email that does not include both the organization's physical address and a way to unsubscribe or opt out of receiving future emails. The Email Marketing module includes a way for recipients to unsubscribe from emails.

Unsubscribe behavior is defined when configuring outbound email per table on the Marketing tab. Depending on how the unsubscribe behavior is defined, the server not only marks a given email's Email Status as Unsubscribed when a user clicks the Unsubscribe link, but it may also update a designated "opt out" field in the corresponding table and record to which the email was sent.

Either way, the source lead or contact who requested the unsubscribe can be eliminated by searching for an Email Status value of Unsubscribed or by searching your custom opt out field, and any future mass emails automatically exclude the contacts whose Email Status is Unsubscribed.

If the email that was unsubscribed was linked to a campaign, the Number of Unsubscribes field in the campaign is also incremented when the user unsubscribes.



Unsubscribing a contact and updating the fields does not prevent manual emails from being sent to these contacts, of course. If you want to ensure that they never receive email from you, you can set up a rule that clears the email address field of contacts whose Email Status is changed to Unsubscribed. Without an email address, these contacts can't be emailed inadvertently by a user.