



Service **Autopilot**™

EMAIL
SUBSCRIPTIONS
USER GUIDE
V3

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“The beginning is the most important part of the work.”

--Plato

Summary

Service Autopilot will give members the ability to customize email subscriptions and their clients will have the option to subscribe or unsubscribe from these. To *Unsubscribe*, clients will need to access an [Unsubscribe Page](#) linked to email correspondence via [Email Links](#). This user guide will give an overview of all the different components related to the unsubscribe process.

Important Information

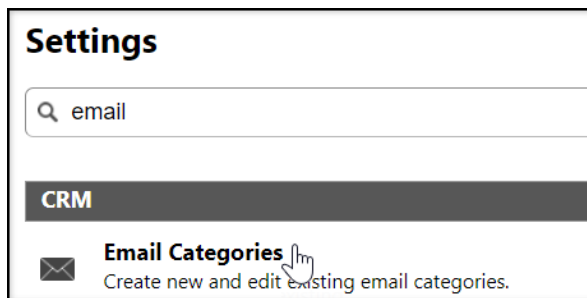
No action on your part will be required to implement this functionality in relation to **Permissions** and **User Roles & Rights**. Even so, it is necessary to follow the listed concepts to fully take advantage of this feature. The *Unsubscribe* functionality encompasses the following key changes in Service Autopilot (fall 2016):

- [Redesigned Email Overlay \(including Marketing\)](#)
- [Addition of Email Category List Screen](#)
- [Redesigned Email Subscription Dialog in Client View](#)
- [Redesigned Unsubscribe Page](#)

Accessing Email Categories

To access the Email Categories related to the *Unsubscribe* process, you will follow these steps:

1. Go to: Settings > Email Categories





2. The **Email Categories** screen will emerge.

<input type="checkbox"/>	Name	Description	Default	Date Created
<input type="checkbox"/>	Billing	Billing & Account Info		6/17/2020
<input type="checkbox"/>	General	General	✓	2/28/2018
<input type="checkbox"/>	Marketing	Marketing		3/28/2018
<input type="checkbox"/>	Newsletter	Emails associated with a company newsletter		2/28/2018
<input type="checkbox"/>	Notifications/Updates	Update clients about appointment changes, weather conditions, or other notifications		3/26/2022
<input type="checkbox"/>	Promotion	Promotion		3/2/2022
<input type="checkbox"/>	Sales	Emails associated with sales promotion		2/28/2018
<input type="checkbox"/>	Survey	Survey		3/29/2022

Understanding the Email Categories Screen

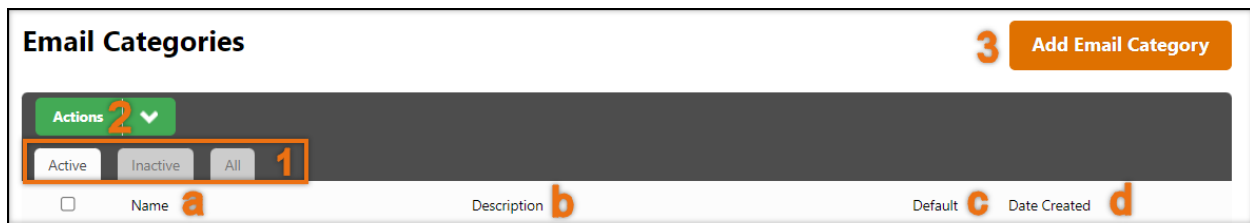
The **Email Categories** page includes different views and functions that will let you to create and manage email categories. These categories will be used to identify email types to be sent to clients, to which they can choose to unsubscribe from. This section will give an overview of the **Email Categories** screen.

The Email Categories are composed of the following key elements:

1. Status Tabs
 - Active – This tab shows all active email categories.
 - Inactive – This tab shows all inactive email categories.
 - All – This tab shows all email categories (active & inactive).
2. Actions Button 
 - Add – This action button will add a new email category.
 - Delete – This action will delete any selected category.
 - Make Inactive – This action will make any selected category inactive.
3. Add Email Category – This button will allow you to add a new email category.

Type of email categories within the **Email Categories** screen consist of the following:

- a. Name – This section will display the name of the email category.
- b. Description – This section will display the description for the email category.
- c. Default – This section will display whether the email category is set as a default that will be prepopulated when sending bulk emails.
- d. Date Created – This is the date of creation for the email category.



Creating Email Categories

You can create additional email categories through the **Email Categories** screen. These categories are important for the *Unsubscribe* process. Follow these instructions to create an email category:

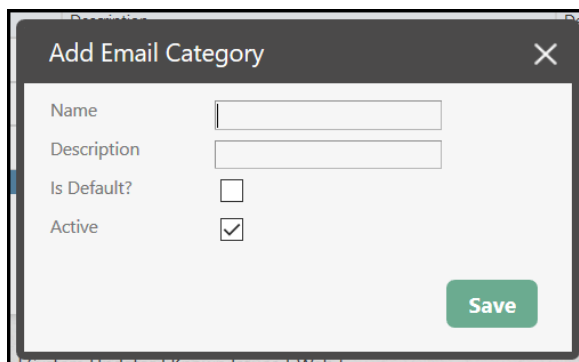
1. Access the **Email Categories** screen (Settings > Email Categories).
2. Hover over the **Actions** button and click *Add*.



3. Alternatively, you may choose to click on the **Add Email Category** button on the top right of the screen.



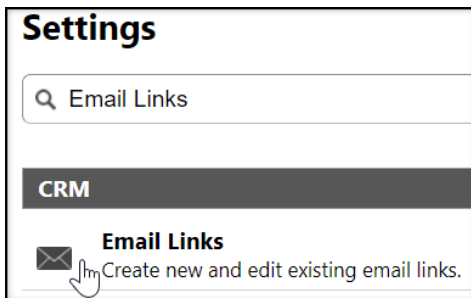
4. The Add Email Category overlay will emerge. Fill out the following components:
 - a. Name – Type in the name of the email category.
 - b. Description – Type in the description of the email category.
 - c. Is Default? – Check/Uncheck whether you want this email category to be a default.
 - d. Active – Check/Uncheck whether this email category will be active or not.
5. Click **Save**.



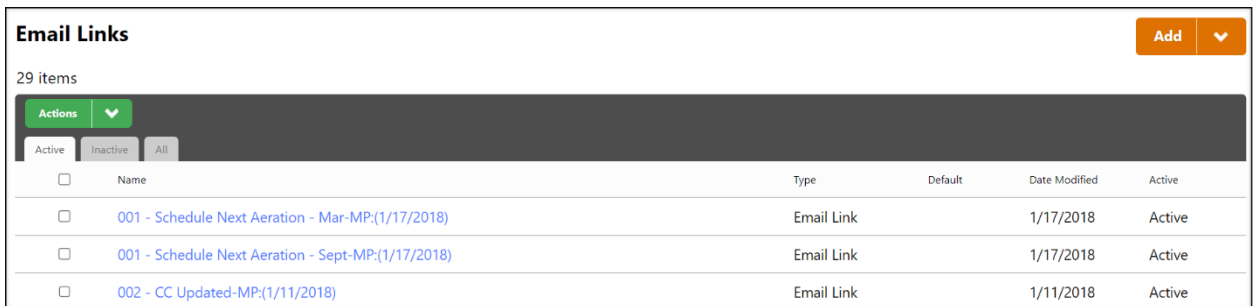
Accessing Email Links

This will be used in conjunction to emails to allow clients to unsubscribe from different email categories. Creating these links allows you to attach them directly onto an email. In this instance, the email link of focus will be the *Unsubscribe* email link. This link will redirect clients to an **Unsubscribe Page** that will allow them to choose to what email categories to unsubscribe form.

1. Go to: Settings > Email Links



2. The Email Links screen will emerge.

A screenshot of the 'Email Links' screen. At the top right, there is an 'Add' button and a dropdown arrow. Below the header, it says '29 items'. There is an 'Actions' dropdown menu and three status tabs: 'Active', 'Inactive', and 'All'. Below the tabs is a table with the following columns: Name, Type, Default, Date Modified, and Active.


<input type="checkbox"/>	Name	Type	Default	Date Modified	Active
<input type="checkbox"/>	001 - Schedule Next Aeration - Mar-MP:(1/17/2018)	Email Link		1/17/2018	Active
<input type="checkbox"/>	001 - Schedule Next Aeration - Sept-MP:(1/17/2018)	Email Link		1/17/2018	Active
<input type="checkbox"/>	002 - CC Updated-MP:(1/11/2018)	Email Link		1/11/2018	Active

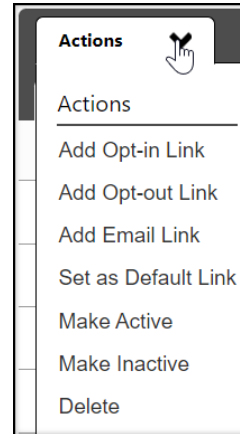
Understanding the Email Links Screen

The **Email Links** screen includes different views and functions that will let you create and manage email links. Email links are necessary to create emails that need to link to other pages (i.e. **Unsubscribe Page**). This section will give an overview of the **Email Links** screen.

The Email links are composed of the following key elements:

1. Status Tabs
 - Active – This tab shows all active email links.
 - Inactive – This tab shows all inactive email links.
 - All – This tab shows all email links (active & inactive).

2. **Actions Button** 
 - Add Opt-in Link – This action adds a new opt-in link.
 - Add Opt-out Link – This action adds a new opt-out link.
 - Add Email Link – This action adds a new email link.
 - Set as Default Link – This action defaults selected email link.
 - Make Active – This action activates selected email link.
 - Make Inactive – This action inactivates selected email link.
 - Delete – This action deletes selected email link.
3. **Add Button** – This button will allow you to add the following email links:
 - Add Opt-in Link – This option adds a new opt-in link.
 - Add Opt-out Link – this option adds a new opt-out link.
 - Add Email Link – This option adds an email link.



Type of email links within the **Email Links** screen consist of the following:

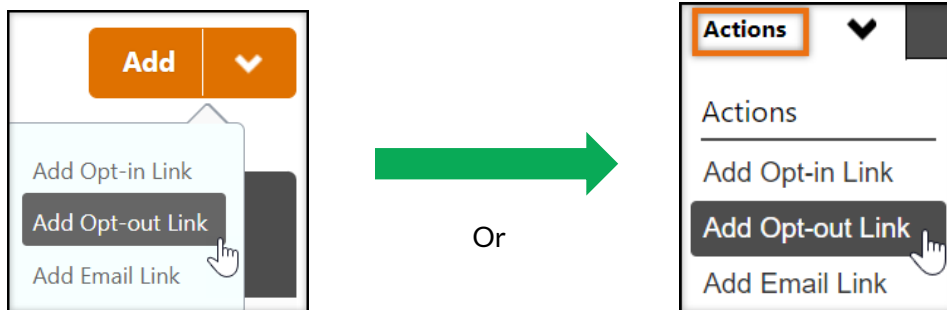
- a. **Name** – This section displays the email link name.
- b. **Type** – This section displays the email link type.
- c. **Default** – This section displays with a green check mark whether the email link is a default or not.
- d. **Date Modified** – This section displays last date of modification.
- e. **Active** – This section displays whether the email link is active or inactive.



Creating an Email Link

To include the *Unsubscribe* option within your client emails, you will create an *opt-out* email link. This will be done from the **Email Links** screen. Follow these steps to create an opt-out email link:

1. From the **Email Links** screen click the **Add** button and select the *Add Opt-out Link* option.
2. Alternatively, hover over the **Actions** button and select on the *Add Opt-out Link* option.



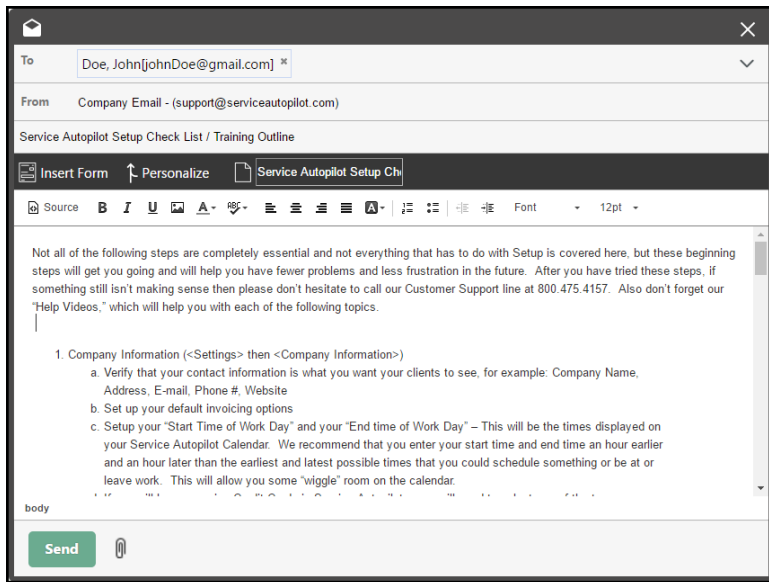
3. The **Add Opt-out Link** overlay will emerge. Type in the following:
 - **Name** – Name to appear in the Email Links screen.

- Link Text – Name to appear in the email link.

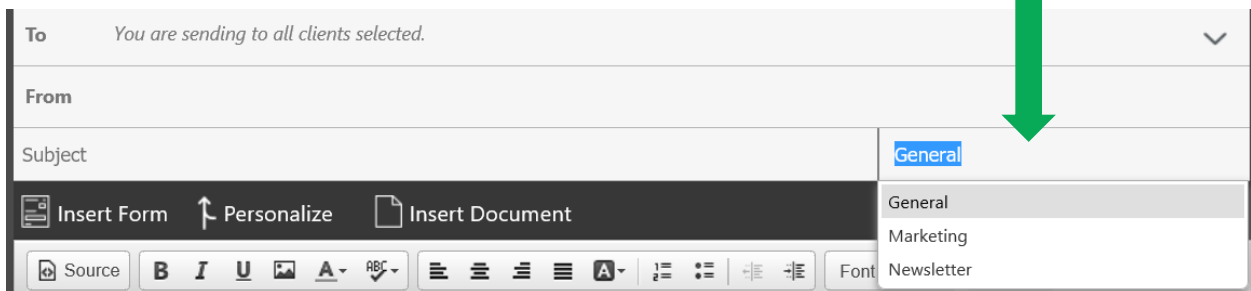
4. Click **Save**.

Email Overlay

Service Autopilot has redesigned its **Email Overlay** in 2016. Now, the email overlay showcases a slim, simple, and flat design – while maintaining all the same functionality as before. In addition, an *Email Category Selection List* is available when sending bulk emails from the **Client List** and **Dispatch Board**.

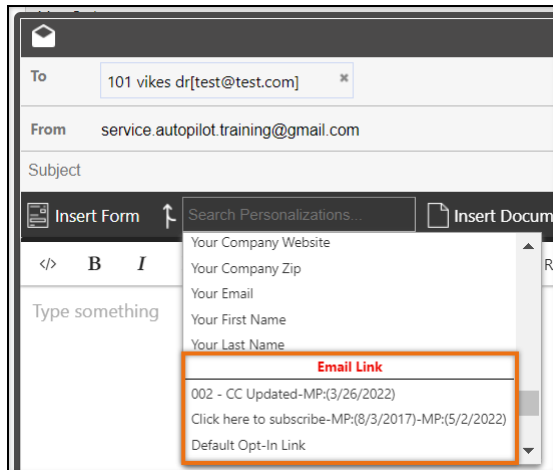


The *Email Category Selection List* is only available when sending bulk emails from the **Client List** or **Dispatch Board**. Important, *Email Category Selections* is a required field that must be selected before sending bulk email.



Adding an Unsubscribe Link

Selecting the **Personalize** option in the email overlay will allow you to include an **Email Link** inside your email. In this instance, you will use this section to include the *Unsubscribe Link*, which allows clients to unsubscribe from any email category in your organization.



Inside the Personalize drop down, you can find all email links, including an *Unsubscribe Link* (opt out link). Select a link from the list to include in the body of your email. A client can click on this link, which will redirect them to the **Unsubscribe Page**.

Redesigned Unsubscribe Page

The **Unsubscribe Page** will display email categories created on your Service Autopilot account. Through this page, clients can choose whether to subscribe or unsubscribe from these email categories. There are two methods:

1. Check or uncheck the email categories.
2. Click the **Unsubscribe me from ALL emails** button.

Once complete, you must click the **Update Profile** button.

Please Confirm Your Unsubscribe

Are you sure you wish to stop ALL marketing emails from Joe's Pest Control sent to your email address?

Unsubscribe

Unsubscribe me from ALL mailings. **Method 2**

I wish to continue receiving occasional mailings based on my interests.

Method 1

General

Educational

Survey

Weekly Special

Newsletter

Notifications/Updates

Recommendations

If this is not your email address, there is no need to unsubscribe. You have not been added to any mailing lists.


Email Address

Update Profile


Enabling/Disabling Email Categories

You may enable or disable different email categories from the **Email Settings** in the **Client View** screen. This section will show all email categories within your organization. This section will walk you through the process of enabling/disabling email categories:

1. Access the **Client View** screen.
2. Go to the **Client Profile** and click on the settings icon next to email address.

101 Vikes Dr (y17z) - Edit 

Teddy Bridgewater
101 Vikes Dr
Saint Paul, MN 55105
Map Code: Goldy

No phone # on file
test@test.com 

3. The **Email Subscription Settings** dialog box will emerge. Adjust between the different email categories to turn ON/OFF.

Email Subscription Settings

The client has subscription settings below. Move the sliders below to enable or disable this client's subscription for emails.

- ON** **General**
General correspondence with clients
- ON** **Educational**
Information about the company or general care, products and services
- ON** **Survey**
Client satisfaction surveys or feedback
- ON** **Weekly Special**
Weekly promotions or sales offers
- ON** **Newsletter**
Company newsletter
- ON** **Notifications/Updates**
Update clients about appointment changes, weather conditions, or other notifications
- ON** **Recommendations**
Tips or recommendations on general care, services or products

Save

4. Click **Save**.