# Top 10 Questions: Emailing Contacts

12/12/2024 3:03 pm CST

## Overview

By default, all templates that service**minder** builds on your behalf will include the **Unsubscribe** button. This is mandatory for all email communications to adhere to legal requirements.

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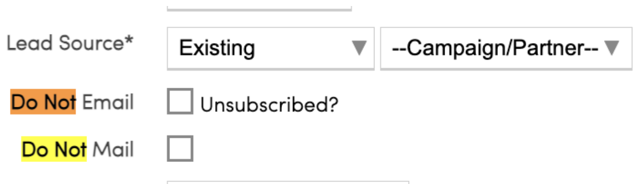
## 1. Does the “Do Not Email” checkbox, include both automated and ad hoc emails?

Yes, it applies to both automated and ad hoc emails.

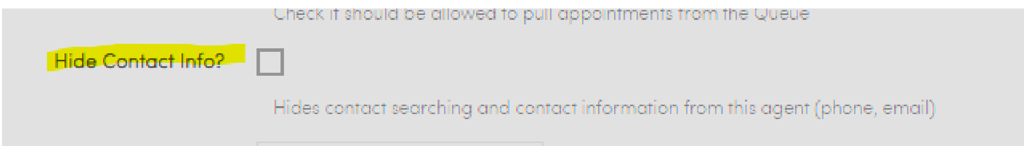
## 2. Is it possible to remove/disable the email option?

You cannot remove the option to see an email option across the board. We can't remove the email address tied to the Contact(s). The customers/leads do have personal settings through service**minder** that they can accept/decline emails or texts (if you are set up with two-way texting). So they can limit it on their side.

There is an option when editing a Contact that you can choose to Unsubscribe that person from marketing emails. This will not affect service-based emails such as a change in their appointment scheduled.




Per User, edit and hide Contact's phone and email addresses when viewing. This is done via**Control Panel > Users > Edit** the User (as long as they have a Service agent attached) > check the box under **Schedule/Inventory Permissions.**




## 3. Can a customer "opt out of emails" on their end like they do for text messages?

Yes, but it only applies to marketing communications rather than "all or nothing" like texting is. Any emails sent via Drips, for example, are all required to have an unsubscribe link, and if a contact clicks those, they will be opted out of any marketing communications. This opt-out status does not apply to "transactional" emails -- so appointment confirmations, reminders, completion notices, invoices, receipts, etc. Those emails will normally go through regardless of that setting.

The only caveat is if they hit **Unsubscribe** or **This is Spam** through their email provider (ie., outlook, gmail, yahoo, etc.). Since we can't determine what they are marking/complaining about, we will stop all email delivery to that email address.

If that was done in error, and the client wants to resume those communications, that can be done through the **Email Delivery** tool in Dashboard. Once you confirm the client does want to opt back in, you can clear the block for their email using that tool. A Brand Admin may need to help you with this part.

## 4. Where would we see that they have opted-out?

Contacts can opt-out of receiving marketing messages from you via email. It should not affect receipt of service-based messages. These are the ways you can see who opted-out of emails:

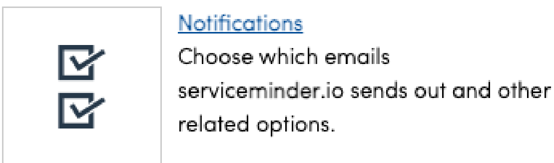
1. This is shown at the contact level under the **Do Not Email** checkbox.

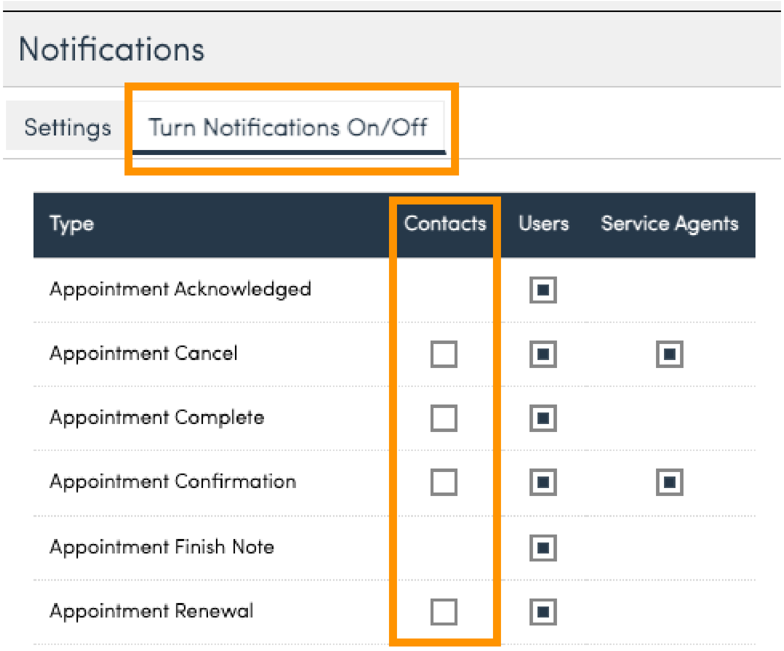
2. You can also see this information on the **Contacts Grid**. There is a column header labeled **Do Not Email** if you wanted to review lists.

3. **Do Not Email** and **Do Not Text** are both values available when you download contacts.

## 5. Why wouldn't a customer receive an email?

1. Check that you have settings turned on for them to receive emails. **Go to Control Panel > Notifications > TurnNotifications On/Off** tab.

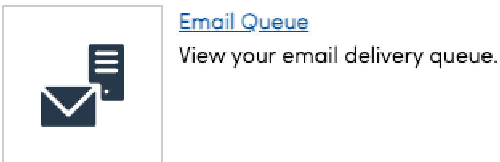





Look for the **Contacts** column and if the boxes are unchecked, the customers cannot receive those communications.

## 6. How would I check if they didn't get the email?

Go to **Control Panel > Email Queue**.

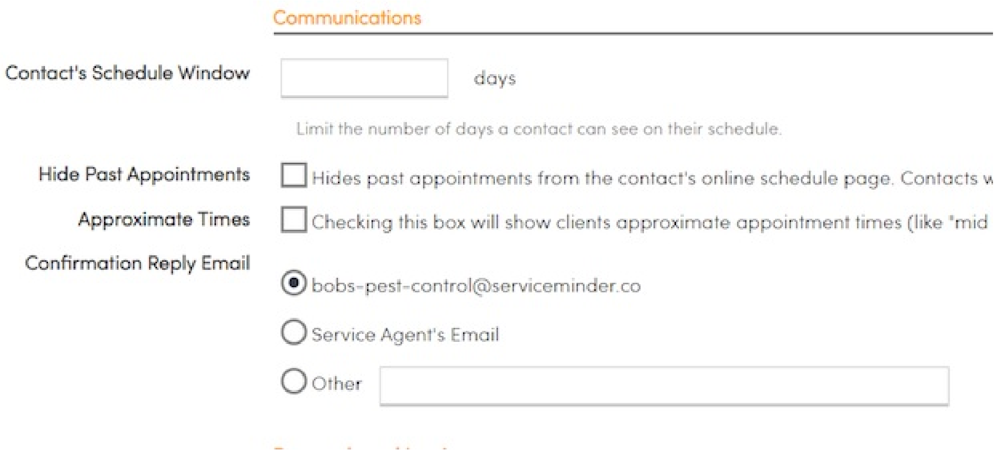



Here, you can review the most recent emails that went out, bounced emails, and emails queued - meaning they are about to be sent.


If something went wrong, you will see the **Status** as **Error** and a message explaining what went wrong. Sometimes it is an incorrect email. Maybe your Outlook updated their settings and you have to speak to your IT provider. You may want to clear a bounce (or send a support ticket and we can do it for you) so that you can try sending the email again.

## 7. Is there a way for franchisees to receive responses from customers that reply to emails sent through SM?

For appointment communications, they can select or set up a different reply email within Control Panel > Scheduling.

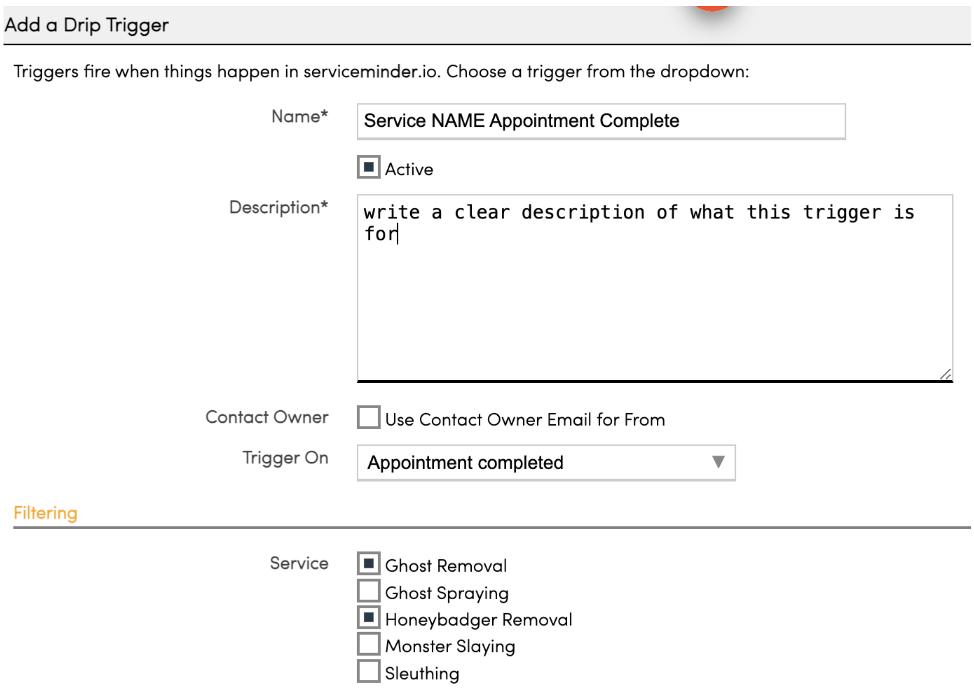



In drip triggers and campaigns, they can select to use the contact owner email as the "from" which may help:


But otherwise there's not a way to designate the reply-to email.

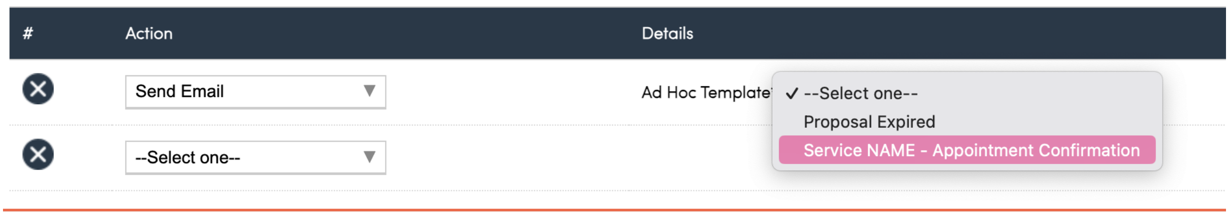
## 8. Is there a way to turn off appointment completion email notifications ONLY for a specific service?

If you have **Drip Triggers** as part of your service**minder** subscription, then you can do this. You would create a trigger to fire on **Action Complete**.




Filter to send ONLY for the Service(s) that you want.

Set the **Action** for **Send Email**. You will have to select an ad-hoc email template (so you may first need to create one in **Control Panel> Ad-hoc Email Templates**).




# 9. What is the difference between Internal Notes and Customer Notes? Where are they visible?

**Customer Note**s on a Proposal or Appointment are contact-facing, meaning that they can be viewed by the customer. This would be something like, "the discount we agreed upon has been applied to the cost of this service."

**Internal Notes** can be see by the users within the account including service agents, so they are meant to be used as reminders about prior work or requests by the customer, essentially anything that would be useful for reference later. **These are not seen by the customer.**

A **Flash Message** is a separate field specifically for main notes such as gate codes or "don't let the dog out". These are messages that absolutely should not be missed by the service agent. **This is also not seen by the customer.**

Internal notes written on a proposal are displayed in the **Additional Details** section of the appointment under the **Proposal Notes** tab. If you schedule the appointment off a proposal, then you have the option to add additional notes that appear in the **Notes** tab.

Those additional notes can be marked as **Private** meaning that only users with the permission can see them. You can adjust these permissions for users by going to **Control Panel>Users>Edit User> Permissions** scroll down to the section that says **Contacts:Notes**. There are two categories they need to mark as either grant or deny.

If you generate an invoice based off the scheduled appointment or the original proposal, then the notes should carry over but they do not show up on the customer-facing version of the proposal or invoice or the receipt.

## 10. What Does "Send Account Invite" Mean? I've never seen that on a Contact Detail Page before.

That is connected to our online **Customer Portal** feature. You have to turn on settings to allow a contact to create a customer portal, but they can log in and see all of their invoices. They can even schedule appointments, if you turn on that setting as well.

If an organization has those settings turned on, you will see **Send Account Invite** next to the contact's email address. Clicking that link sends an portal creation login to that Contact.

To learn more, visit our page on The Contact Portal and Self-Scheduling.

## 11. How do I edit the default confirmation email for a Contact?

For the default confirmation email, you will need to select that email address when creating the next appointment. Going forward, the email selected will be set as the default email address. At the bottom of the appointment creation screen you will see the email addresses under "Delivery".

You can do the same for when you send out a new proposal, or if you wanted to edit the most recent proposal. Those email address options are on the proposal edit/creation page at the bottom under "Delivery".