

HATCHBUCK QUICKSTART FAQs

HOW DO I INVITE ANOTHER USER?

If you are an admin or account owner, you can do this from Account Settings. Go to your Dashboard, click on your name in the top right corner > select Account Settings > Account > Users > select the blue 'Add New User' button. Depending on the number of users your subscription plan allows for, you may need to upgrade before inviting a new user. The account owner can check the user limit on your subscription by looking under 'Subscription' in Account Settings.

RESOURCE: [Upgrading your Account](#)

HOW DO TEST EMAILS WORK?

A few things will look different when sending a test email. Merge fields from the 'personalize' drop down will not pull actual data. Instead, you will see the merge field name itself (Example: Hi [contact first name]).

Your email footer will not show your company Information. Your subject line will have "Email Test" in front of it.

Tip: You may add yourself as a contact and send yourself an email if you would like to see these things exactly as they are when your contact receives an email from you.

WHERE DO I VIEW MY CONTACTS' ENGAGEMENT?

You can quickly view activity related to Campaigns, Emails, Forms, Link Clicks, Purchases, and Website Activity but using the "Contact Activity" filter in your contacts tab. Within a contact record, you can view the individual's activity by using the filter on the activity feed to select the activity you'd like to view.

RESOURCE: [Guide to Contact Activity Filters](#)

HOW CAN I CANCEL OR RESCHEDULE AN EMAIL OR CAMPAIGN?

From your dashboard, click "emails scheduled today" or "campaigns scheduled today" in the blue box or click the 'reports' tab and choose the 'email history' report. You can manage those emails and campaigns from there.

RESOURCE: [Email History](#)

HOW CAN I CHANGE UPDATE A GROUP OF CONTACTS AT THE SAME TIME?

From the contact list view, use the checkbox located in the header line to select all contacts, a specific number, or just the page you are on. From there, you can choose to take certain action by using the 'Actions' drop down menu. This is how you will send an email to a group of contacts, start a group on a campaign, add tags to more than one contact at a time, update a group of contacts' status, etc.

CAN I EDIT A CAMPAIGN THAT IS RUNNING FOR CONTACTS?

Once your Campaign has begun and contacts are queued up on a Campaign step, you cannot change the date of that step. The campaign steps that have contacts on them will be greyed out and locked, preventing you from making any changes.

CAN I IMPORT COMPANIES, NOTES, OR DEALS ?

If this is a need, we would recommend speaking to your Hatchback consultant so they can help you with the best option. You are able to import company names but not currently any other company data, notes or deals (opportunities). Currently you are not able to import Companies, Notes, or Deals.

RESOURCE: [*Data Conversion Specifications*](#)

WHY ARE TEST EMAILS AND INTERNAL EMAILS LANDING IN MY JUNK FOLDER?

Test emails are sent through a secondary system to preserve the sending reputation of our primary email engine. This is because test emails by their very nature can have abnormalities and can be sent repeatedly to the same inboxes, which can raise flags for SPAM filters.

If internal emails, sent from Hatchback to colleagues or yourself, are ending up in your junk folder, you will need to ensure that you are granting Hatchback permission to send emails on your behalf,

from your domain. This is accomplished by white labeling which should help internal emails land in the inbox. You will need to have your technical contact help with this.

RESOURCE: [White Label Your Domain](#)

WHAT HAPPENS IF SOMEONE UNSUBSCRIBES OR REPORTS ME AS SPAM?

Contacts who have complained of SPAM have their email addresses removed from their contact record and contacts who have unsubscribed will be marked as such on their contact record. Anyone who has complained of SPAM or unsubscribed from your emails will be omitted from any future email sends. Even if they are on a list that you choose to send an email to, Hatchbuck will make sure no further communication is sent to them.

CAN I ADD AN ATTACHMENT TO MY EMAIL?

Yes. Attachments are added to emails by hosting the file and including a link to that file. This helps decrease the likelihood that an attachment could land your email in the junk folder. First upload the file into the My Files section of your database, then you can choose that file from "insert file" drop down in the email editor. Including attachments as a link also provides several benefits:

- When a contact clicks on that link, Hatchbuck will drop a tracking cookie on their browser
- You will be able to track and see as soon as a contact clicks on that link
- Trigger automations based on the contact's link click

Note: there is a 4MB limit on files uploaded to Hatchbuck.