Journey Orchestrator FAQs and Troubleshooting

Below is a list of questions we've heard from customers about Journey Orchestrator, and their answers. If you have questions that are not answered here, or in related support articles, please contact support@gainsight.com. If you would like to suggest enhancements to the Journey Orchestrator functionality, please post them on Gainsight's Community.

Journey Orchestrator integration with Marketo and other automated systems

Currently, Journey Orchestrator does not integrate with any other email systems. If you want to use Marketo, you can integrate it with our Rules Engine. Integration with Eloqua is on our long term roadmap.

Gainsight Email Service

The Gainsight Email Service is backed by Sendgrid. When you send emails via Journey Orchestrator, or the Rules Engine, they are handled by Sendgrid. This also includes rules engine success/failure emails sent to Admins.

Automated vs. Semi-automated Email options

Journey Orchestrator is Gainsight's automated email feature. Admins can design email templates, configure dynamic power lists (contact lists), and schedule the outreach to reach the right customers at the right time.

Gainsight also offers a semi-automated email feature called Email Assist, which is accessible to CSMs using Calls to action in the Cockpit. We recommend using Email Assist tasks when your CSMs need more control over the scheduling and contents of the email. Email Assist tasks utilize Journey Orchestrator email templates, but your CSM selects individual contacts to send the email to, and the email contents can be customized as needed. See Configure Email Tasks to Send from Cockpit for more info.

What's the difference between Program, standard Outreaches, Email Assist, and Gsnap functionality?

All of these features are used for automated communications, but there are differences:

- **Journey Orchestrator** - Admins can send automated emails directly to customers
  - **Standard Outreaches** - ideal for one-off emails
  - **Programs** - Admins can send multi-step outreaches directly to customers (the feature is part of Journey Orchestrator, but functions independently from standard Outreaches)
• Email Assist - CSMs can tailor pre-populated emails and manually send to customers (the feature is part of Cockpit)
• Gsnap - CSMs can record up to 1-min. personalized videos and send to customer contacts

For more information on how Email Assist, standard Outreaches, Programs, and Gsnap compare to one another, and their available functionality, refer to this table.

**Why use Journey Orchestrator over other email tools (e.g. Salesforce)?**

Journey Orchestrator is a powerful tool with richer template-building capabilities, more intelligent contact lists, advanced features such as tokenization using customer data, embedded reports and surveys, and multi-step outreaches, and no limitation in the number of emails that can be sent. Also, you don’t have to leave Gainsight to use Journey Orchestrator.

**Use Multiple Email Platforms in Same Org**

Within the same Salesforce/Gainsight org, it is possible to use Journey Orchestrator, in addition to another email platform such as Marketo.

**Journey Orchestrator Email Storage**

Once a Journey Orchestrator email is sent, will it be recorded in the Activity History in SFDC?

Email data is stored in Email Logs on the MDA Platform. You can also store emails as SFDC activities if you select the "Log Email to SalesForce Activity" option in the Outreach page.

**Surveys and Journey Orchestrator**

You can send Surveys via Journey Orchestrator. Journey Orchestrator enables you to setup a dynamic Power List for your Survey, whereas the existing Survey functionality relies on a static list. For more information on how to send surveys via Journey Orchestrator, please read the article [Send Surveys to Dynamic Contact List via Journey Orchestrator](https://support.gainsight.com/SFDC_Edition/Journey_Orchestrator_and_Email/FAQs/Journey_Orchestrator_FAQs_and_Trouble_Shots).
We recommend that a Gainsight Administrator configures the more complex Power List use cases for the CS team since the user needs to be familiar with the rules engine. However, if granted Journey Orchestrator permissions, a CSM can configure Power Lists. Anyone who has permission to create Power Lists can view and edit existing Power Lists in your org.

**How can I remove individuals from a Power List?**

Use criteria to remove individuals from a list. For example, if you have a field on your Salesforce record for “Email Opt Out” - you can bring this into the criteria. In the future, you will be able to exclude individuals from a Power List. **Note:** the Opt Out field must be explicitly added to your Power List; otherwise, contacts may be included in your power list in spite of being opted out on their SFDC contact record.

**Is there a way to add or delete a single user from a Power List once the list is created, without going back and changing the criteria?**

Not currently. The idea of a power list is to be dynamic, which means contacts in it change based on criteria automatically, versus manual edits.

**Does every CSM have to set up their own power list? Or will it recognize which CSM is trying to use that list and only send it to the clients specific to them?**

It depends on the use case and the message you would like to send. If a CSM wants to email only his / her customers with a specific message, then the power list can be set up to include only that CSM’s customers. However, if the content and the email is the same, then one power list can be created and in the Outreach configuration, the “From Email Address” can be set to the ‘Account → CSM’ field.

**Can you schedule emails based on data stored in Salesforce fields?**

Yes, this is possible based on the criteria you set up in your Power List.

**In permissions, what does it mean to execute a Power List?**

Executing a power list refers to refreshing the Power List. You can refresh the Power List on demand at anytime, or schedule it to refresh daily. If you are scheduling a daily outreach, you would want to refresh your power list daily.

**Are Contact ID’s required when uploading a distribution list to send emails?**

No, the required field is either Contact ID OR Email to create a Power List from a CSV file. If a participant list is uploaded as a CSV in Programs, Contact IDs are not a requirement either. The only required fields are Account ID and Email in Programs.

**Can Journey Orchestrator be used for non-SFDC contacts?**

Yes, but you still need to associate contacts with an Account ID. Journey Orchestrator can also pull in email addresses from Usage subject areas.
How do we manage opt-outs across two different email platforms (between Marketo and Journey Orchestrator)?

Journey Orchestrator stores the email addresses for anyone who has unsubscribed within email logs in the MDA subject area (Unsubscribed Emails). You can sync this into SFDC (on the contact record) and then bring that into Marketo, so that you sync opt-outs across platforms. In Journey Orchestrator, you can filter on any email opt-outs (if it’s stored on the SFDC contact record that gets updated from Marketo), so you don’t include them in your Outreaches.

If there are more than 1000 contacts in a Journey Orchestrator Power List, the table on the summary page only lists 1000. Is this a limitation in the UI?

Yes, the limitation is in the UI. The hard limit is 200,000 contacts.

Can you confirm if there is a way to send (non-marketing) email to contacts who have opted-out of emails via Journey Orchestrator?

There’s no way currently to side-step the subscription preferences in Journey Orchestrator. However, you can use the Rules Engine to send out operational emails. There is an option to disable the opt-outs and send to everyone. See the article Rule to Add Email Subscription Preferences for more info.

Can I download or export a Power List?

Although there isn’t an export option in Journey Orchestrator > Power Lists, you can refresh a Power List, and then you will receive an email with a csv file containing all of the contacts that currently meet the Power List criteria.

How can I review the data source of all Power Lists?

Navigate to Administration > Config Snapshot. Download the snapshot (in Excel format) and you will see all the details of the Power Lists, including Source Objects.

Can I upload a Power List to Journey Orchestrator?

No. Your Power List must be configured in Journey Orchestrator, which enables Gainsight to dynamically update the Power List over time, as different contacts or data match your criteria.

Not all of the contacts in my CSV file show up in the Power List.

Most likely, these contacts are not contacts in Salesforce and Gainsight. You will have to add these contacts to Salesforce and Gainsight first, before you can send them emails using Journey Orchestrator. You can do so quickly from the Contacts section of the Customer 360.

Journey Orchestrator Email Templates

What kinds of HTML code are accepted in Email Templates?

You can bring in any HTML code that you’ve used to build templates in Salesforce or Marketo. It is currently not possible to edit the HTML once you’ve brought it into Journey Orchestrator, however, you can use the WYSIWYG editor to
update the template formatting. Basic HTML is supported, but it’s not guaranteed that all the formatting will be retained; however, you can edit the template after that. We recommend sending yourself a sample email to test how the email looks in your email client.

**Can I embed an NPS survey question directly in my Journey Orchestrator email?**

Not yet, but this is a planned enhancement.

**How many variants can I add to a multi-variant email template?**

You can create a maximum of 15 variants.

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**Journey Orchestrator Outreaches**

**When should the original Outreach feature be used instead of the Program feature?**

We recommend using Program for the majority of use cases. The original Outreach feature should still be used for emails that require the Time Identifier feature, which gives users the ability to send emails at different times to different recipients based on defined criteria. In all other cases, the Program feature is the recommended option. See also [Program FAQs](#).

**Do you need to setup the “From Email” as a universal address in SFDC?**

You can key-in any email address in the “From Email” field, as well as the “Reply To” field.

**Is it possible to trigger more than one Outreach in sequence to a Power List?**

Yes, you can create multiple Outreaches that utilize the same Power List.

**How does the recurring schedule set in the “Scheduler View” differ from the recurrence created in Outreach settings?**

It is the same view. However, the “Scheduler View” is view only, whereas you can set up a one-time or recurring schedule from the Outreach settings.

**Is there anything we need to configure so that the emails are not marked as spam?**

To improve the deliverability of your emails, we recommend that you follow a few best practices:

- use the recipient’s first name in the email body
- offer an unsubscribe link in emails and surveys
- add your business’s mailing address in the email footer
- your IT contact should refer to the article [Gainsight Email Activation](#) for whitelabeling instructions to protect your organization’s email reputation (includes info on SPF and DKIM)

**How do we get past firewalls and spam filters to ensure our emails are delivered?**

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[Updated: Mon, 07 Oct 2019 21:58:46 GMT]
On Gainsight’s side, we make sure the IP Address through which emails are sent is warmed up and has a good reputation. We also make sure once the email ID is detected as invalid, we automatically add it to a blacklist, thus maintaining the reputation of the IP address and ensuring high deliverability.

On your end, you are expected to maintain:

• Clean email lists by pruning out the invalid email addresses.
• Target the right recipients so that there is less chance of your email being marked as Spam.
• Follow email best practices

If we put an unsubscribe link in the email footer, what happens when the customer clicks unsubscribe? Does Journey Orchestrator remove that person from the Power List? Are they removed from all Power Lists? Or do we have to manually reconcile this?

We recommend using the unsubscribe feature that comes with Journey Orchestrator. The unsubscribe footer gets added automatically and the contacts who unsubscribe are not sent email across Journey Orchestrator / Rules / Survey.

There are two sections in the unsubscribe page, when the end-users clicks unsubscribe:

1. Success communication(Journey Orchestrator + Rules Engine): If the user checks this option and unsubscribes, then emails from Rules and Journey Orchestrator will not be sent.
2. Surveys: If the user checks this option, then survey emails are not sent. Note: Applicable only for Gainsight email service.
3. If both of the above options are checked, then no email is sent via Gainsight to that email address.

If you have multiple tokens in a single email, will it NOT send the email if any of the tokens are missing?

If tokens are missing, the email will not send if you have checked the option “Don’t send email when Token/Placeholder value is not available”.

Is there a way to track and cap the number of emails that a single user receives in a given period of time? For example, set a limit that keeps a user from receiving more than 5 outreaches per month.

At this point, you can only limit the duration between the same outreach. e.g. if you have a recurring schedule outreach, you can ensure the same contact doesn't receive the same outreach in 30, 60, or 90 days. Our product team is evaluating the possibility of adding an overall email cap. All of this can be tracked in Journey Orchestrator Analytics.

What is the difference between Outreaches and Programs?

The original Outreach feature is still the best option for sending one-off emails. Programs are designed for multi-chain email campaigns. To learn more about Programs, see the article Program FAQ or the article Introduction to Program.

Journey Orchestrator Analytics

In Analytics, does the number of clicks/opens represent unique contacts or the totals?

It represents the total clicks and opens.
Can we export the Analytics results into Excel for summary reporting?

Yes. Click the Visualization type and select Table. Then click the Settings wheel and select Export as Excel.

If you have additional questions or enhancement suggestions, please visit the Gainsight Community.

Follow-up Emails

How do I send a follow-up email?

With standard Outreaches, you can generate a follow-up Power List and Outreach, and edit the Email Template as needed, to send a follow-up email to select recipients. With Programs, you can set up a Reminder Email, Escalation Email, and/or Thank You Email directly in the Program configuration.

Additional Tracking - Dynamic Image Tracking Pixel

Can I add additional tracking, such as a dynamic image tracking pixels, in my Journey Orchestrator email templates?

This is not supported at this time. However, it is possible to add this option in Salesforce email templates.

Journey Orchestrator Errors

For information on how to resolve common Journey Orchestrator errors, refer to Common Errors and Reasons.

Power List Troubleshooting

Tips for troubleshooting:

• If you don’t see the contacts in your Power List that you expect to see, refer to the Email Validator article and check the blacklist in case the contact has been opted-out.

• If your Power List query fails to generate results, you may not have the appropriate SFDC permissions for one or more of the Power List fields.

Token Mapping

Token mapping in Journey Orchestrator emails involves three steps, in three different areas of Journey Orchestrator.
1. Journey Orchestrator > Power Lists: add any fields you wish to tokenize under “Select list fields” (First name, Last name, CSM Name, etc.)

2. Journey Orchestrator > Email Templates: to tokenize any text in the email, click the Tag button in the email designer. Then you can edit the token properties (placeholder text, default value).

3. Journey Orchestrator > Outreaches: click the mapping icon next to any tokenized text to select the field to map to.

**Why can't I add fields to the Email Logs object?**

The Email Logs object is read-only to customers because Gainsight uses the object to write data to (from Journey Orchestrator outreaches for example).

Contact your CSM if you need to add fields to these hidden objects, and they will connect you with a resource who can assist.

**Email Limits**

**Marketo:**

- Distribute via Survey Module: 1000 / schedule
- Distribute via Rules Engine: 200K per rule run
- Journey Orchestrator: Not Applicable

**Salesforce Email service:**

- Distribute via Survey Module: 750 / day across all schedules
- Rules Engine: Not Applicable
- Journey Orchestrator: Not Applicable

**GS Email service:**

- Distribute via Survey Module: 1000 / schedule
- Distribute via Rules Engine: 200K per rule run
- Journey Orchestrator: 40K for operational emails and no limit for non-opeational emails.

**Do we Support Emails which are sent from Programs on email client IBM Notes?**

No, we do not support emails which are sent from Programs on IBM Notes email client.

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https://support.gainsight.com/SFDC_Edition/Journey_Orchestrator_and_Email/FAQs/Journey_Orchestrator_FAQs_and_Trou...