How to use the Inbox Insight App

The **Inbox Insight** app provides essential tools for testing and optimizing your email campaigns before sending them to real recipients. The application includes following modules:

- **Email placement tests** which helps to inspect where your email lands (Inbox, Spam, etc.) across popular mailbox providers. It also includes **Spam check** overview which helps to analyze the spam score of your emails and review the factors impacting deliverability.
- **Email previews** which helps to visualize how your email appears across different email clients and devices to ensure consistent rendering.

Connecting Mailgun

To use any feature of Inbox Insight, you need to create and connect a **Mailgun** account. To connect the account:

1. **Generate an API key in Mailgun**

   o   Log in to your Mailgun account.

   o   Generate a new API key by following this guide and copy the key.

2. **Connect Mailgun to Inbox insights**

   o   In Creatio, go to **Email placement tests** or **Email previews** → **Settings** → **Account settings**.

   o   Click **Connect account**.

   o   Paste the copied API key into the **API key** field.

   o   Click **Connect**.

Once successfully connected, your account will appear in the settings and have the **Connected** status.

Note: Currently, only **US-based** Mailgun accounts are supported. If your Mailgun account is in the **EU region**, integration is not available yet. You can switch to another US-based account by connecting it to Inbox insights instead. Only one Mailgun account can be active at a time.

Email placement test

Connect a seed list

SEED LIST SETTINGS

A seed list is a group of test email addresses provided by Mailgun. By sending your marketing emails to this list, you can get valuable inbox insights, like deliverability and placement.

Creatio Emails EU

Manage active seed list

A **seed list** is required to run email placement tests. Follow these steps to set it up:

1. **Create a seed list in Mailgun**

   o Log in to your Mailgun account.

   o Go to **Inbox Placement** → **Seed Lists.**

   o Create a Seed List under the appropriate settings.

2. **Import the seed list into inbox insight**

   o In Creatio, go to **Email placement tests** → **Email placement settings** → **Seed list settings**.

   o Click **Manage active seed list**.

   o Click **Get seed lists** to download the seed lists you created in Mailgun.

3. **Select a seed list for testing**

   o Select the list you want to use for your Inbox Insight test from the downloaded lists.

   o Click **Apply**.

Note: Currently, only one seed list can be active at a time. You can switch to another seed list by following the steps above.

Send an email placement test

Before starting the test, ensure the following:

- Your Creatio website can send marketing emails and is connected to CloudEmailService.

- The sender domain of the bulk email is verified. Do not use public domains, for example, gmail.com, yahoo.com, or unverified sender domains.

- The subject line of the bulk email does not contain the following:

  - Macro (personalization fields)

  - Special characters (+, ~, etc.)

  - Emojis

Otherwise, the test might be inaccurate or fail.

Once your **Mailgun account** and **seed list** are connected, follow these steps to run a test:

1. Go to **Bulk Emails** section in Creatio.

2. Select the bulk email you want to analyze.

3. Open the **Inbox Insights** toggle panel.

4. Click **Run new test**.

The test will start immediately, and results will be populated as data is collected. The test results will be updated every minute for tests that have the "Processing results" status.

View test results

Email placement result

Status
Complete

The results are updated automatically every 1 minute.

Inbox	Spam	Total
102	9	121

Spam check   Not spam

Actual score	Max allowed score
-0.2	5

- The **Inbox Insights** toggle panel of the selected bulk email contains a summary of test metrics:
  - o Email placement result:
    - Status: current status of the email placement test.
    - Total: the total number of recipients in the test.
    - Inbox: the number of recipients who received the email in their inbox.
    - Spam: the number of recipients who received the email in their "Spam"/"Junk" folder.
  - o Spam check:
    - Label "Not spam/Is spam": shows the overal spam verdict for the email.
    - Max allowed score: maximum spam score that means email is not spam.
    - Actual score: current spam score for this email.
- Click the **arrow** button to expand detailed results.

The detailed report includes the following info:

- Email placement
- Spam check

Email placement detailed report

5/29/2025 3:58:35 PM / Invitation: Join us for No-Code days (sample)   ✕

Bulk email
Invitation: Join us for No-Code days (sample)   ▶ Run new test

EMAIL PLACEMENT   SPAM CHECK

Status   Modified on   ⟳
Complete   6/16/2025 2:44 PM

Seed list   Total recipients
Creatio Emails EU   121

Overall placement results   ⩲ Apply filters by provider

Inbox	Spam	Gmail folder placement
102	**9**	Focus - 0%
		Promotions - 100%

Pending	Missing	
0	**10**	

▲ Email placement providers breakdown ⌕

Provider	Provider type	Inbox ⌄	Pending	Missed	+ ⋮
Proofpoint	Spam checker	10	0	0	0
Gmail	Public mailbox	10	0	0	0
Yahoo	Public mailbox	10	0	0	0
Office365	Corporate mailbox	10	0	0	0

Close

1. General info

Consist of information about test name, status, seed list used, recipient count, and date of last modification of results. You can refresh results manually or start a new test.

Test Statuses

- Sending Test : the test was initiated and is being sent.

- Processing Results: the test was identified in Mailgun, and the first results have been received.

- Complete: the test has finished running, and the final results are available.

Note: The time required to reach "Complete" status depends on the quality of the email and how recipient servers process the message.

2. Overall inbox insight results

This section provides an overview of email placement:

- Inbox: emails that successfully landed in the recipient's inbox.

- Spam: emails flagged as spam/junk.

- Pending: emails that have not been received yet.

- Missing: emails that were not delivered even after test completion.

3. Gmail folder placement

This chart displays the distribution of emails across different Gmail folders, such as Primary, Promotions, Social, Updates, Spam.

4. Providers breakdown

A breakdown of test results by mailbox provider, showing Total, Inbox, Spam, Pending, and Missing emails for each provider. The list of providers depends on the domains included in your selected seed list.

Spam check detailed report

5/29/2025 3:58:35 PM / Invitation: Join us for No-Code days (sample)   ✕

Bulk email
Invitation: Join us for No-Code days (sample)   ▶ Run new test

EMAIL PLACEMENT   **SPAM CHECK**

> **NOT SPAM** The message passed the checks. See Spam rules impact to view what influenced the score.

Actual spam score   Allowed spam score

-0.2   **5**

SpamAssassin scores can be positive or negative: positive values suggest spam, while negative values mean non-spam. For best results, aim to keep your score below 5 to ensure your email is safe from being marked as spam.

🔼 **Negative impact** 🔍

These checks failed and increased the spam score. If the overall result is "Not spam", they can be ignored, but fixing them may improve deliverability. If the overall result is "Is spam", focus on the most impactful issues.

Rule	Points ⌃	Description	＋ ⋮
DKIM Signature Check	0.1	Detects if the message contains a DKIM signature, though it may not be v：	

🔼 **Positive impact** 🔍

These checks passed and helped lower the spam score, improving the message's chances of being delivered successfully.

Rule	Points ⌃	Description	＋ ⋮
DKIM Signature from Provider's …	-0.1	Verifies if the message includes a valid DKIM signature from the technical	
DKIM Signature Validation	-0.1	Checks if the message contains a valid DKIM signature, which verifies the	
DKIM Signature from Sender's D…	-0.1	Checks if the message contains a valid DKIM signature from the sender's	

Close

1. General score info

It provides a breakdown of how your email performed against spam detection rules based on **SpamAssassin**. It helps identify specific technical factors that may influence the message's deliverability.

- **Actual spam score** – the score calculated for your email based on applied rules.
- **Allowed spam score** – the threshold value. A score below this (typically 5) indicates the message is considered safe.

SpamAssassin scores can be:

- **Positive**: Indicates potential spam indicators (bad for deliverability).
- **Negative**: Indicates factors that strengthen deliverability (good for inbox placement).

For best results, keep your actual score well below the allowed maximum.

2. Score breakdown

The test results are grouped into two categories:

- **Negative impact** – Rules that increased the spam score. These checks failed and may reduce the chance of successful delivery. If the overall result is *Not spam*, they can usually be ignored, but resolving them may still help improve deliverability.
- **Positive impact** – Rules that helped reduce the spam score. These checks passed and indicate strong technical credibility of your email.

Tip: Even if your overall result is *Not spam*, addressing failed checks can further improve delivery rates, especially for sensitive mail servers.

Email previews

Use Email Previews to see how your message renders across various devices and email clients before sending it to recipients.

Run the preview test

Email preview new test ✕

1. Open "Email previews" section in your <u>Mailgun account.</u>

2. Click "Create" > "From Email Provider".

3. Confirm the email is the same as shown below. If it doesn't, you can update it directly in the field.

~~preview-3000b35d-e7d1-4d66-b7d2-71e55e71eeed@previews.inboxready....~~

> We'll run this test across all available Mailgun email clients. It will count toward your Remaining Email Previews, based on the number of "Credits to be used".
>
> Pricing depends on your <u>Mailgun billing plan.</u>
>
> **Credits to be used**
> 105

Cancel   **Confirm and run test**

- Go to the **Bulk emails** section.
- Open the email you want to preview.
- In the **Inbox insights** panel, under **Email preview test**, click **Run new test**.
- Confirm your Mailgun-connected email address.
- The system will calculate the number of preview clients and credits required.
- Click **Confirm and run test**.

Note: Preview tests use credits based on the number of selected email clients. The estimated amount is shown as the **"Credits to be used"** metric before starting the test. On average, a test uses 105 credits. Usage may vary depending on your <u>Mailgun plan</u>.

View results

Email preview result ⬈

Status
[Complete]

Previews used
105

Once the test starts, Email Previews will begin downloading from Mailgun. Results will become available once previews from all selected clients have been received.

Email preview result ⟳

Something went wrong while loading test results. The reasons of failure can be:

1. Loading results have failed - the search takes longer than usual.

2. This might be a Mailgun issue. Please check Deliverability services > Email Previews on the Mailgun status page

Press "Retry" to try loading the same results again, or "Run new test" to begin a new one.

⟳ Retry

If the system fails to retrieve results (for example, due to a Mailgun delay or network issue), the preview test status will be marked as **Failed**.

In this case:

- Press **Retry** to try loading the same results again.
- Or click **Run new test** to launch a new preview session.

You can also visit the Mailgun status page and check the status under *Deliverability services > Email Previews* to see if the issue is on Mailgun's side.

After test completion:

- Click the preview test to see a visual gallery of how your email appears in each tested email client (e.g., Apple Mail, Outlook 365, macOS, dark mode versions).
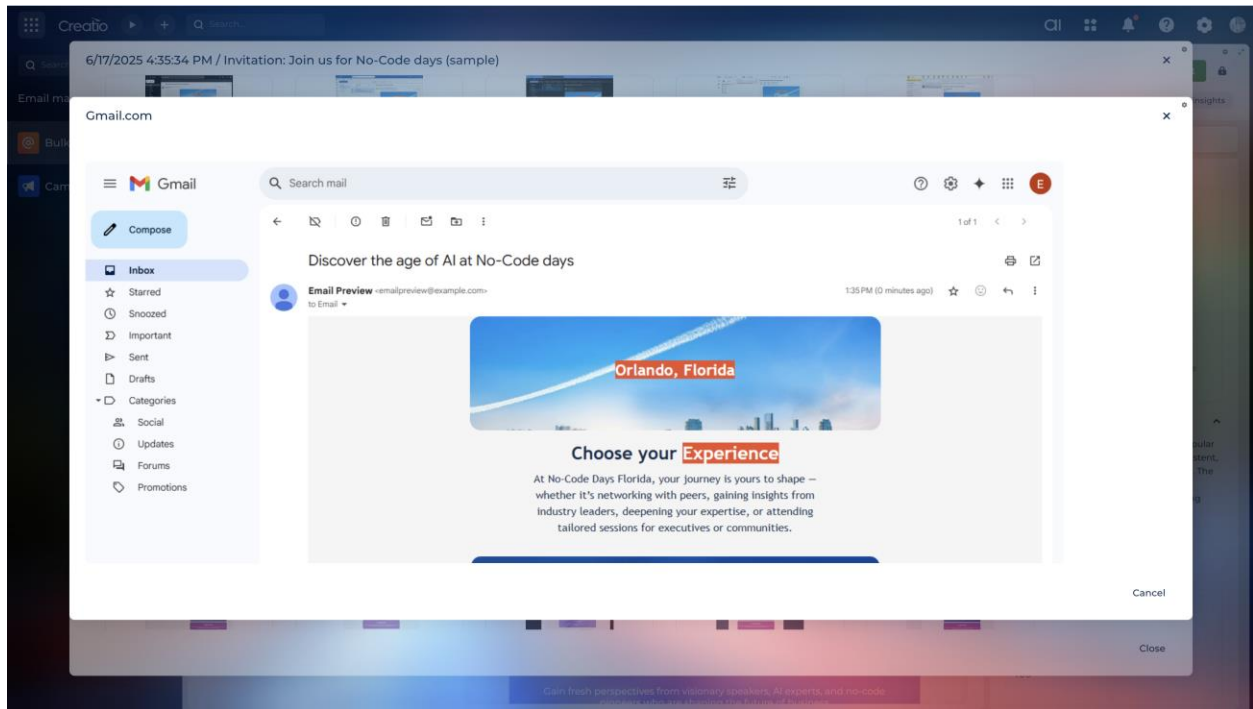
To examine the rendered version more closely, click on the **name of the email client** shown below each thumbnail to view the **expanded full-size preview**.

Note: Some email clients, such as **Outlook for Desktop**, may display rendering issues in previews. For example, images may not load correctly or layouts may appear broken. This is due to Outlook using Microsoft Word's rendering engine instead of a standard HTML engine, which limits support for modern email designs.