Creating a newsletter subscription form

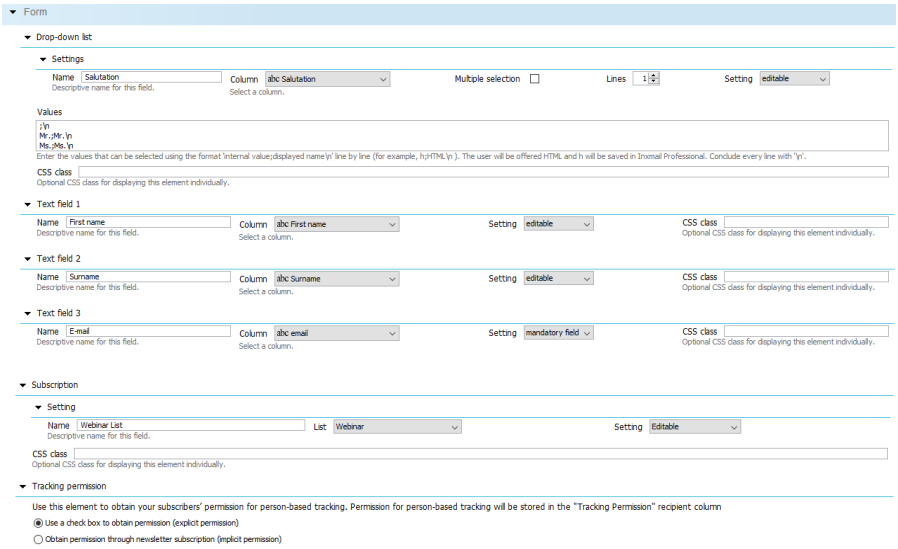
Smart Guide

This Smart Guide shows you how to create a double opt-in (DOI) subscription form in Inxmail Professional that you can integrate into your website. To be able to set up a DOI subscription form, you require four existing landing pages (Subscription data transferred, Subscription successful, Timeout and DOI already confirmed).

Preparation: A sample of the mentioned landing pages can be found at: https://academy.inxmail.com/training/index.htm. You also require a list to which your recipients can subscribe. This list should contain the Email, Salutation, First name and Surname columns.

Create subscription form

1. Open the *(Global settings)* and the *Files & web pages* agent.
2. Click the Web pages tab and then click *(Create new web page)*.
3. Enter a name and select *Subscription (standard)* as the template.
4. Click *OK*.
5. In the *Settings* element, specify the *Form name* (for example, Photo Newsletter Subscription).
6. Open the *Form* element. The *Email* column is already specified. Change the setting here to *Mandatory field* [1, 2].
7. Under Setting in the *Subscription* element, specify the *Name* (for example, Photo tips list) and *List* (for example, Photo tips) to which a prospective recipient can subscribe. Select the desired *Tracking Permission* type.
8. Salutation: In the *Form* element, click + *(Add element)* and add a *Selection list* by clicking *Add and Close*.
9. First name: In the *Form* element, click + *(Add element)*. Add the *Text field* element. Repeat the process for the surname [3].
10. Apply the values and settings as shown in the following screenshot:



[1] FIELD VALUE SETTINGS

Default field values can be defined as follows:

- *Editable*
  (Can be completed).
- *Mandatory field*
  (Must be completed).
- *Inactive*
  (Non-editable and invisible)

[2] ADJUST STYLE

Predefined layout settings (CSS stylesheet) and interface texts (buttons and system messages) can be edited in the *Style* main element. If necessary, assign a CSS class to the form fields.

[3] ARRANGE ELEMENTS

Click an element and use the blue arrow icons ↑ *(Move element up)* and ↓ *(One element down)* to change how the elements are arranged.

[1] TIP

Please note the following when creating a subscription form:

- Only ask for personal data that is necessary for providing the respective services (email address)
- Explain how personal data will be handled (data protection notice)

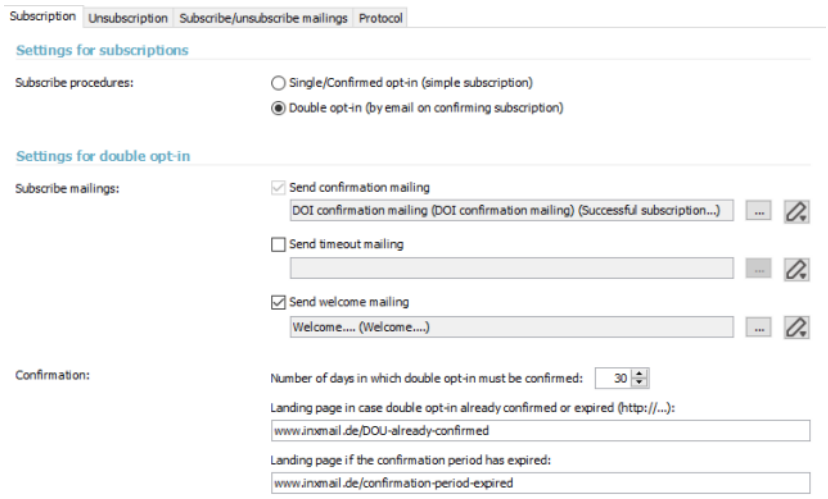
Integrate subscription form into website

Integrate the form into a web page using 'Dynamic entry' [4]. You need a container web page for this. The page must contain the Inxmail `[$include(content)]` command.

1. In the *Settings* main element, add the *Dynamic entry* element. Enter the URL of the container web page including the character set encoding (for example, see http://download.inxmail.de/training/).
2. Click *(Save)*.
3. Click *Yes* to confirm the following dialog. Specify the *File name* and *Directory* and click *OK*.
4. Click *(View web browser preview)* to open and test the form.

Configure Subscriptions agent

1. Go to the list for which the subscription form has been set up.
2. In the *Subscriptions* agent, go to the *Subscribe/unsubscribe mailings* tab and customise and approve the mailings [5].
3. Switch to the *Subscription* tab and select *Double opt-in (subscription to be confirmed by email)* as the subscribe procedure.
4. Select all the required mailings [6] and enter the URLs of the landing pages in the text field beneath.
5. Click *(Save)*.



- A specific action is required for consent to be provided (for example, selection of a check box)
- Obtain consent to person-based tracking
- Keep separate from other declarations (prohibition of coupling)

[4] IFRAME AND DYNAMIC ENTRY

'Dynamic entry' is recommended for static web pages. For performance reasons, the complete web page is cached for one hour, cleared and then cached again.

In the case of dynamic web pages, hourly updating may be too infrequent. We therefore recommend the use of IFrame here.

[5] VERIFY OPT-IN

Make sure that the 'Registration was successful' landing page is linked in the DOI confirmation mailing via the 'verify opt-in' link. After the *Check* workflow step, go to the *Approval* workflow step and activate the mailing there.

[6] CONFIRMATION MAILINGS

To ensure that a confirmation mailing is sent, the *Send confirmation mailing* option is already selected in the *Subscriptions* agent under Subscription mailing. Here, select the mailing that has already been activated. Confirmation mailings that are already being used can no longer be deactivated or modified. Therefore, duplicate the mailing by copying and pasting. Then edit the copy and use later in place of the original mailing.