






# Creating profile management and integrating it in mailings

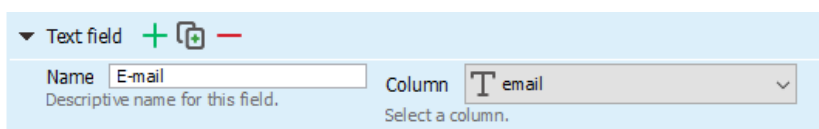
## Smart Guide




This Smart Guide shows you how to create profile management using a dynamic web page and integrate it into your mailing. The answers of your recipients are stored in their profiles in *Inxmail Professional*. For our example, you must create the following table columns in the recipient database.

**Preparation:** Columns that need to be created: Salutation, First name, Surname (all *Text* column type), Wellness, Beauty (all *Yes/No* column type). You also need two lists (that the recipient can subscribe to/unsubscribe from).


### Create profile management


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 *Profile management (standard)* as the template.
4. Click *OK*.
5. Under *Form name* in the *Settings* main element, enter an appropriate name. Under *List*, select which recipients are to be given access to profile management [1].
6. Specify whether mandatory fields are to be marked with an asterisk (\*).
7. Predefined texts are stored in the *Style* main element [2].
8. Click the *Form* main element [3]:
9. The text field for the email address is already shown.
10. Click the word/element *Form* and then click  (*Add element*).
11. On the *Element for form* level, select the *Heading* element and click *Add + Close*.
12. Enter *Manage Personal Data* in the *Heading* field [4].
13. Click the word *Text field* in the *Email* element and click  (*Add element*).



▼ Text field   

Name  Descriptive name for this field.

Column  email  
Select a column.

14. Select *Radio button*. Confirm with *Add + Close*.
15. Click  (*Duplicate element*) beneath *Value*.
16. Add the salutation as follows and select the appropriate column:



#### [1] LIST: ACCESS

Here, you select which recipients are to have access to the profile. You can store a particular list – usually you create profile management that can be used for all existing lists. For this purpose, you must select *system* to enable all recipients to access the profile.

#### [2] ADJUST STYLE

Predefined layout settings (CSS stylesheet) and texts (buttons, page titles, general texts and system messages) of the web page can be edited in the *Style* main element.

#### [3] ARRANGE ELEMENTS

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

#### [4] HTML COMMANDS

HTML commands can also be entered in the text fields. If the heading should be in bold type, enter: `<b>Heading</b>`

▼ Radio button

▼ Settings

Name  Column  Setting

Descriptive name for this field. Select a column.

Value 1   
Enter the value that can be selected using the format 'internal value;displayed name' (e.g.: h;HTML). The user will be offered HTML and h will be saved in Inxmail.

Value 2   
Enter the value that can be selected using the format 'internal value;displayed name' (e.g.: h;HTML). The user will be offered HTML and h will be saved in Inxmail.

CSS class   
Optional CSS class for displaying this element individually.

17. Click the word Radio button and click **+** (Add element). On the *Element for form* level, select the *Text field* element and click *Add*. Then select *Text field* again and click *Add + Close*. Fill out/store the text fields as follows:

▼ Text field 2

Name  Column  Setting  CSS class

Descriptive name for this field. Select a column. Optional CSS class for displaying this element individually.

▼ Text field 3

Name  Column  Setting  CSS class

Descriptive name for this field. Select a column. Optional CSS class for displaying this element individually.

18. Click the word *Text field 3* and click **+** (Add element). On the *Element for form* level, select the *Heading* element. Click *Add + Close*. Enter *Manage Interests* in the *Heading* field.
19. Add two *Check boxes*. Proceed as described in Point 17, but select the *Check box* element instead of *Text field*. Fill them out as follows:

▼ Check box 1

▼ Settings

Name  Column  Setting

Descriptive name for this field. Select a column.

Value (selected)   
Here, enter the value that is to be saved if the check box is selected.

Value (not selected)   
Here, enter the value that is to be saved if the check box is not selected.

CSS class   
Optional CSS class for displaying this element individually.

▼ Check box 2

▼ Settings


Name  Column  Setting

Descriptive name for this field. Select a column.

Value (selected)   
Here, enter the value that is to be saved if the check box is selected.

Value (not selected)   
Here, enter the value that is to be saved if the check box is not selected.

CSS class   
Optional CSS class for displaying this element individually.

20. Click the word *Check box 2* and click **+** (Add element). On the *Element for form* level, select the *Heading* element. Click *Add + Close*. Enter *Manage Subscriptions* in the *Heading* field.
21. Click the word *Heading 3* and click **+** (Add element). On the *Element for form* level, select the *Subscription* element and click *Add + Close*. Click  (*Duplicate element*) to duplicate the element. Fill out the elements as follows [5]:

▼ Subscription 1

▼ Setting

Name  List  Setting

Descriptive name for this field.

CSS class   
Optional CSS class for displaying this element individually.




▼ Subscription 2

▼ Setting

Name  List  Setting

Descriptive name for this field.

CSS class   
Optional CSS class for displaying this element individually.

22. Click  (Save). Then click  *Publish web page*. Specify the *File name* and *Directory* and confirm with *OK*.
23. To test the profile management, click  (*View published web page*) and enter your email address. Confirm by clicking *Send*. The link to profile management will then be sent to you. Clicking the link will take you to profile management [6].

## [5] SUBSCRIPTION: LIST ASSIGNMENT

You use this form element to insert a check box on the Web page. This check box allows users to subscribe to one of your mailing lists.

You can add the following settings to the element:




- › *Editable*: The form element is displayed on the Web page and is editable. The form element is disabled when the Web page is called up (**most commonly used setting**).
- › *Editable (preselected)*: The form element is displayed on the Web page and is editable (that is, users can enable or disable the check box). The form element is enabled when the Web page is called up.
- › *Hidden (preselected)*: The form element is not displayed on the Web page. It is enabled (in the background).
- › *Inactive*: The form element is displayed on the Web page but is not editable. The form element is always disabled.
- › *Inactive (preselected)*: The form element is displayed on the Web page but is not editable. The form element is always enabled.

## [6] TEST PROFILE MANAGEMENT






For the profile management link to be sent to you, your email address must be stored in the recipient database.

## Integrate profile management into your 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 via  (*Add element*) and enter the URL of the container web page including the character set encoding.
2. Click  (*Save*).
3. Click  (*View web browser preview*) to open and test the form.

## Integrate profile management into your newsletter (smart template)

1. Click  (*View web browser preview*) and copy the URL from the browser.
2. In the  *Mailings* agent, double-click the mailing into which profile management is to be integrated.
3. In the editor, click the position where you want to integrate the link to profile management. Click the  (*Insert link*) button and paste the copied URL from the clipboard. Alternatively, you can integrate the link in your mailing using the *Further link* element (depending on template programming).
4. Click  (*Save*).
5. Test the integrated link in the  *Check workflow step* before sending the mailing [8].

## Storage of the data


After the user has entered and saved the profile management data, it is stored in the columns of the recipient table.

### [7] 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.

### [8] PROFILE MANAGEMENT WITHOUT A TEMPLATE

In the case of text and HTML mailings in *Inxmail Professional*, the necessary recipient parameters are not automatically added to the URLs. You must enter the link or URL in the editor using an HTML command – placement of the link using the  (*Insert link*) button will not work!

HTML code for a standard link:

```
<a href="http://inxmail.de/umfrage.jsp?params=[%online_params]">Manage profile</a>
```

HTML code for a tracking link:

```
<a href="[%url:unique-count; "http://inxmail.de/umfrage.jsp " ]&params=[%online_params]">Manage profile</a>
```

If you do not want to pass the values in encrypted form, replace the `online_params` command with `online_params_unencrypted`. As a result, all values that are required for the personalisation of dynamic Web pages (JSP), among other things, are passed in plain text.

### [I] QUERY TRACKING PERMISSION

Starting from Release 4.7.1 of *Inxmail Professional*, the template for the 'Profile management' dynamic Web page contains the *Tracking Permission* element. If you would like to use this element, you will need to add it manually to the *Subscription* element. Further information can be found here.