SEND

Preference Center Setup Guide
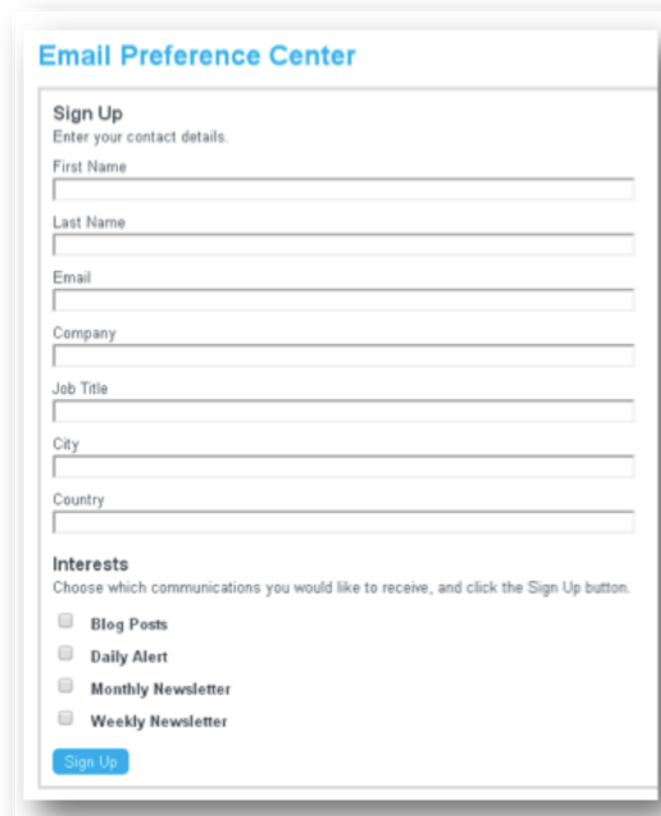
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1. OVERVIEW

Preference Center is a tool that helps you establish a healthy communication cadence with your subscribers. It provides an easy way for your subscribers to manage their email by giving them a centralized portal to control what they receive and how often they receive your communications.

The sign-up form offers a simple method for individual users to capture new contacts and set email preferences.

The form can be configured initially by editing specific settings available to your account. These have been set for default use, should you require customizations to this form contact Helpdesk to assist with this.

2. SETTINGS

The Preference Form offers the following settings and options for configuration, enabling you to set custom options.

2.1. How to create the Sign Up Form

The Sign Up Form is made up of **Contact Fields** and **Interests** with the heading names customizable for each account. The fields displayed at the top are the personal details your contacts will fill out e.g. First Name, Last Name and Email.

Further down in the Interests section, your contacts can subscribe to their preferences, which are supported by creating groups within your Send Account. Interest topics are linked to groups and this is where a contact's details are saved when subscribing.

2.2. Creating additional Custom Contact Fields

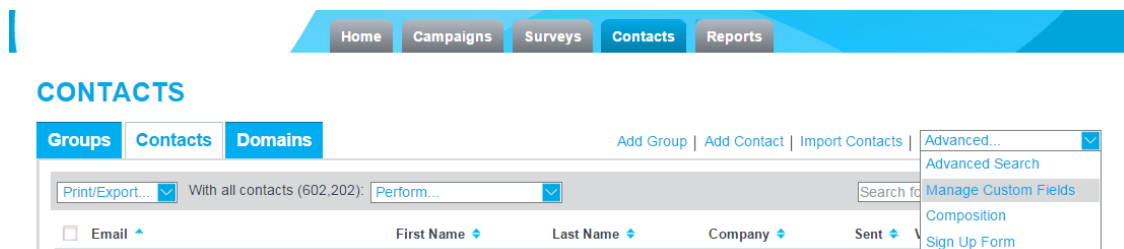The Preference Form displays three default fields: First Name, Last Name, Email.

Additional Contact fields which can be added are:

- [ ] Company
- [ ] Job Title
- [ ] Gender
- [ ] Title
- [ ] Salutation
- [ ] Birth Date
- [ ] Address Line 1
- [ ] Address Line 2
- [ ] City
- [ ] State
- [ ] Zip/Postal Code
- [ ] Country
- [ ] Phone
- [ ] Mobile
- [ ] Fax
- [ ] Email Format
- [ ] External Contact ID

The system also supports up to an additional 25 custom fields, which can be added as a contact field.

To create a custom field, Select > **Contacts Main Menu > Advanced Dropdown menu > Select Manage Custom Fields**
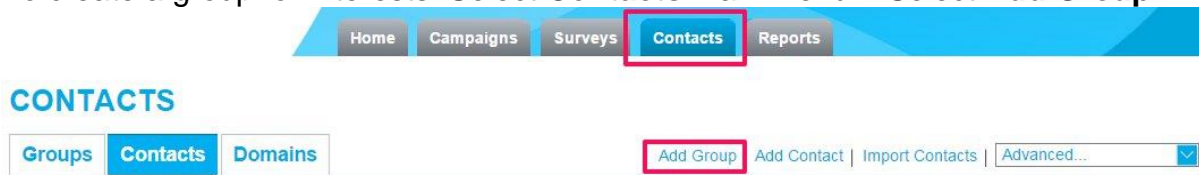

Select **Add Field**

Enter the name of the custom field you wish to add, then Select **Add.**
Repeat these steps to add additional custom fields for the Preference Form.

2.3. Creating Groups for Interests

To create a group for interests: Select **Contacts** Main Menu > Select **Add Group**

Enter Group Name and Select **Add Group.**

This is repeated for each Interest you wish to add to the Preference Form.

3. SETTING UP THE PREFERENCE FORM

Once your settings are defined you can easily access the form Sign-Up Form window which has been added to the **Contacts** area of the system to provide quick access to these features.
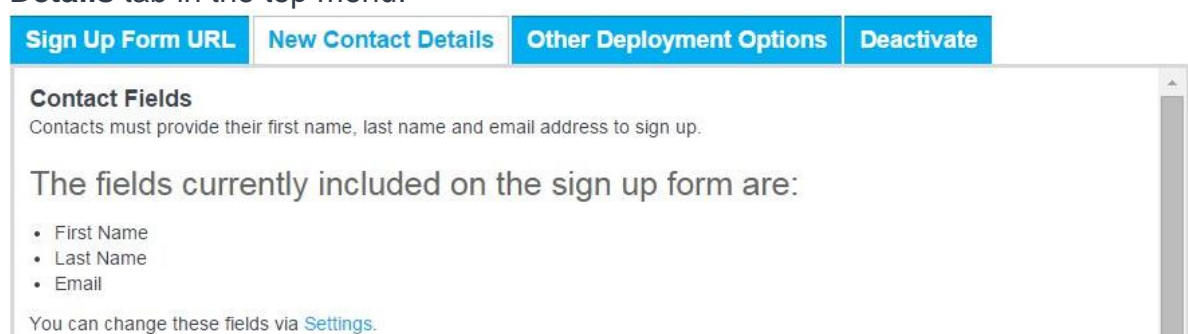
You can access this from: **Contacts > Advanced Dropdown menu > Sign-Up Form**
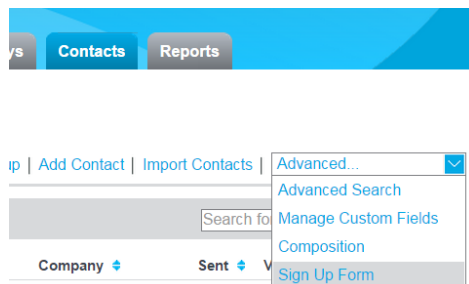
The Preference Form will need to be activated, to activate this select **Activate Sign Up Form.**

The form will display your new sign up URL for the Preference Form.
The next step is to configure the New Contact Details. Select the **New Contact Details** tab in the top menu.

3.1. Adding Contacts fields to the Preference Form

Select **Settings > Preference Center.** Enter **Contact Editing** in the search box, then select the drop down menu option and click **Edit**.

Select the **On** radio button to allow contacts to edit their contact fields, then select from the three default fields: First Name, Last Name, Email, if applicable.

Selecting the **Show Additional Contact Fields** will display the additional fields available and the created custom fields for selection**.**
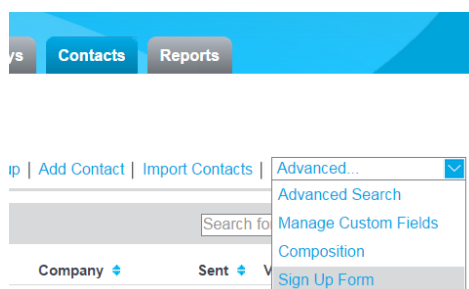

Then Select Update

3.2 Setting up the Interests for the Preferences Form (Adding Groups)

Once your settings are defined you can easily access the form Sign-Up Form window. This has been added to the **Contacts** area of the system to provide quick access to these features.

You can access this from: **Contacts > Advanced Dropdown menu > Sign Up Form**

The Preference Form will need to be activated, to activate this select **Activate Sign Up Form**

The form will display your new sign up URL to be used for the Preference Form. The next step is to configure the New Contact Details. Select the **New Contact Details** tab in the top menu.

On the New Contact Details page, locate the Settings option in the Groups section and select it.

Select **Settings > Preference Center.** Enter **Group Editing** in the search box, then select the drop down menu option and select **Edit.**

Select the **On** radio button to select the groups to assign as interests.
This page includes customizations to fill in:

Allow contacts to select which group(s) they belong to

○ Off   ● On

Section Heading

Display Name

Interests

Displays on preference center page

Instruction Text

Enter the text to be displayed at the top of this section on the preference center page, immediately above the list of groups.

Instruction Text for Existing Contacts

Choose which communications you would like to receive, and click the Update button.

Instruction Text for Sign Up Form

Choose which communications you would like to receive, and click the Sign Up button.

Groups

Select which groups contacts can choose to receive communications from when visiting the preference center page.

Group Name	Display Name	Description	
:: Finance	Finance	Finance News	Remove
:: General News	General News	Updates	Remove
:: IT	IT	Information Technology	Remove
:: Property	Property	Hot Property	Remove
:: Retail	Retail	Retail Updates	Remove

Select Groups

Select the **Select Groups** button to add additional interest groups to your Preference Form.

Select Groups   ✕

	Name ▲	Contacts ⬍	Score ⬍	Updated ⬍	Created ⬍
✔	Finance	0	0	3 hours ago	3 hours ago
✔	General News	1	0	3 hours ago	3 hours ago
✔	IT	0	0	3 hours ago	3 hours ago

5 Groups Selected   Cancel   **Select**

Check the groups you wish to add as interests and click the **Select button,** then **Update.**

4. MODIFY THE CONFIGURATION OF YOUR SIGN UP FORM

1. Click **Contacts** in the main navigation menu.
2. In the Advanced drop down menu, select **Sign Up Form**.
3. The Sign Up Form window includes several tabs to making managing your Sign Up Form easy:
   - Sign Up Form URL – provides the hyperlink you can distribute or display for contacts.
   - New Contact Details – outlines how new contacts will be stored in the system.
     - The "Contact Editing" setting allows you to control the text that displays on the Sign Up Form as well as which fields of information will be gathered from new contacts.
     - The "Group Editing" setting allows you to present a list of groups to the recipient so they can choose which communications they wish to receive.
     - The "Sign Up Automatic Group" setting controls where new contacts will be placed (this is not something that your contacts can see or control).
     - The "Welcome Email" setting allows you to choose a campaign to be sent automatically to new contacts added via the Sign Up Form.
   - Other Deployment Options – provides additional options for how the Sign Up Form could be deployed or promoted, including short URL and QR codes. The "Embed" sub-navigation item includes options to change the style for how the Sign Up Form appears, including font, colors, and width.

5. DEPLOYMENT OPTIONS

5.1. Embedding the form in to your website

If you wish to embed the Sign Up Form into your website, you can quickly generate an iframe containing the code.

5.2. How to De-activate a live Preference form

Click Deactivate Sign Up Form to disable the Sign Up Form link, preventing any more contacts from signing up.

6. USING THE PREFERENCE CENTER WITH SURVEYS

You may also use the confirmed opt in feature to capture and verify new contacts in surveys. You might use a survey to do this over a Sign Up Form if you require:

- Auto populated fields e.g. first name, email address
- Various restrictions e.g. close date, maximum responses limit
- Flexible theme editing

6.1. Add Confirmed Opt In to survey

In survey Content > click Edit on a Free Text question.

Click Settings > Show > Restrict Answer To Email Address > tick Mandatory 'Yes' box > tick Confirm Email Address 'Yes' box > Update.

6.2. Set up an Action to store contacts

Under Questions > click Page dropdown > Actions > Add Action > Add Contact.

After entering a Title, click Select Groups to choose the group your sign ups should be stored to. Store answers from the survey questions to specific fields in the Contacts section of your account.

You should at least map the email address question to the Email field.

7. VIEWING THE CONFIRMED CONTACTS

To see which of your contacts confirmed their email address and other details:

- (Individual) Contacts > Edit dropdown > Confirmed: Yes/No

- (Percentage) Contacts > Advanced dropdown > Composition > Confirmed

- (Search) Contacts > Advanced Search dropdown > Advanced Search > Select Field: Confirmed > Match: Yes/No > Run Search

- (CSV/XLS file) Contacts > Print/Export, select CSV/XLS > Save and open file > Refer to Confirmed column in file

8. INFORMATION

The "Contact Editing" and "Group Editing" features of the Preference Forms are not intended to be or replace a CRM system and may not be appropriate for companies with multiple user accounts. The Preference Form operates on a one-to-one level, meaning the preferences of a single individual recipient are stored within a single user account.

If a recipient may be stored within multiple user accounts at your company, you would need to turn on Contact Editing and Group Editing for a single account that shares groups out to other users.
Contact your administrator or the Client Helpdesk for additional help with Preference Center configuration.

9. CONTACT

If you would like to discuss any element of this document please contact us with the below details.

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