

# Automatic Web Forms II

for ACT! 2011 and up



## User's manual – part 8

How to set up a double opt-in form

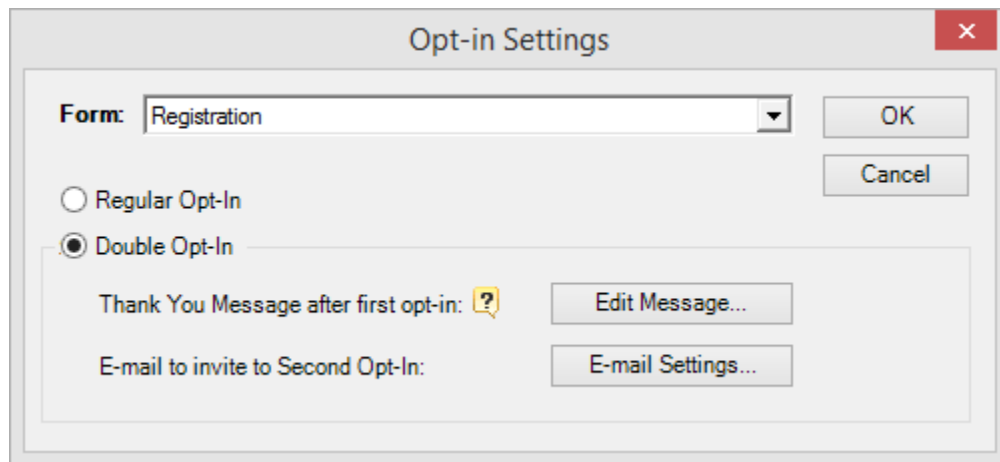
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## The process explained

A double opt-in process is a 2-step process. First the person who wants to opt-in fills out the form and submits it. At this point, the Automatic Web Forms sends an e-mail out which contains a confirmation link. The person then clicks the link and the opt-in is confirmed. At this point, the form result may be made available by Automatic Web Forms to be imported in Act! and whatever Server Triggers are set will be triggered.

## Setting up the double opt-in process

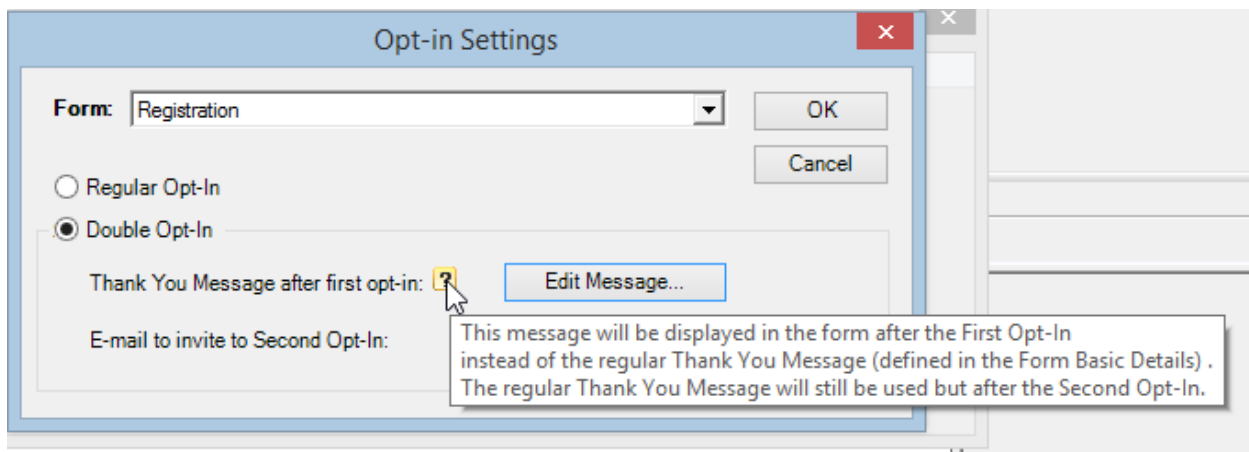
Go to *Forms>Edit form>Opt-in Settings....* By default, the option *Regular Opt-In* is selected. Click the *Double Opt-In* radio button.



The screenshot shows the 'Opt-in Settings' dialog box. At the top, there is a title bar with a close button. Below the title bar, there is a 'Form:' dropdown menu currently set to 'Registration'. To the right of the dropdown are 'OK' and 'Cancel' buttons. Below the dropdown, there are two radio buttons: 'Regular Opt-In' (unselected) and 'Double Opt-In' (selected). Under the 'Double Opt-In' section, there are two fields: 'Thank You Message after first opt-in:' with a yellow question mark icon and an 'Edit Message...' button, and 'E-mail to invite to Second Opt-In:' with an 'E-mail Settings...' button.

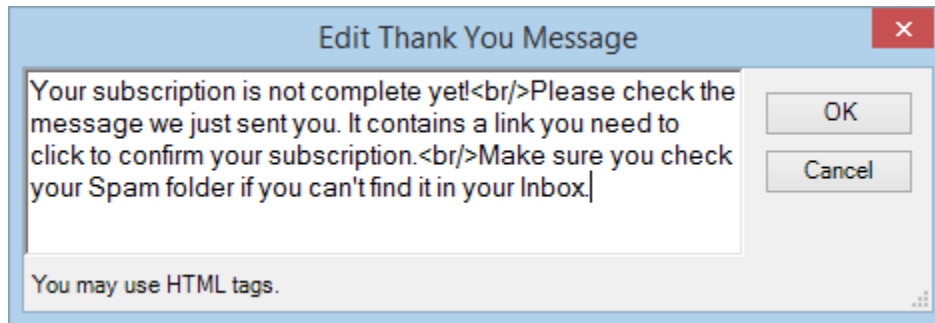
### The Thank You message

At this point, you have to define the Thank you message that the person who opts in will see after the first opt-in.



This screenshot is similar to the previous one, but it includes a tooltip. A mouse cursor is hovering over the yellow question mark icon next to the 'Thank You Message after first opt-in:' field. The tooltip text reads: 'This message will be displayed in the form after the First Opt-In instead of the regular Thank You Message (defined in the Form Basic Details) . The regular Thank You Message will still be used but after the Second Opt-In.'

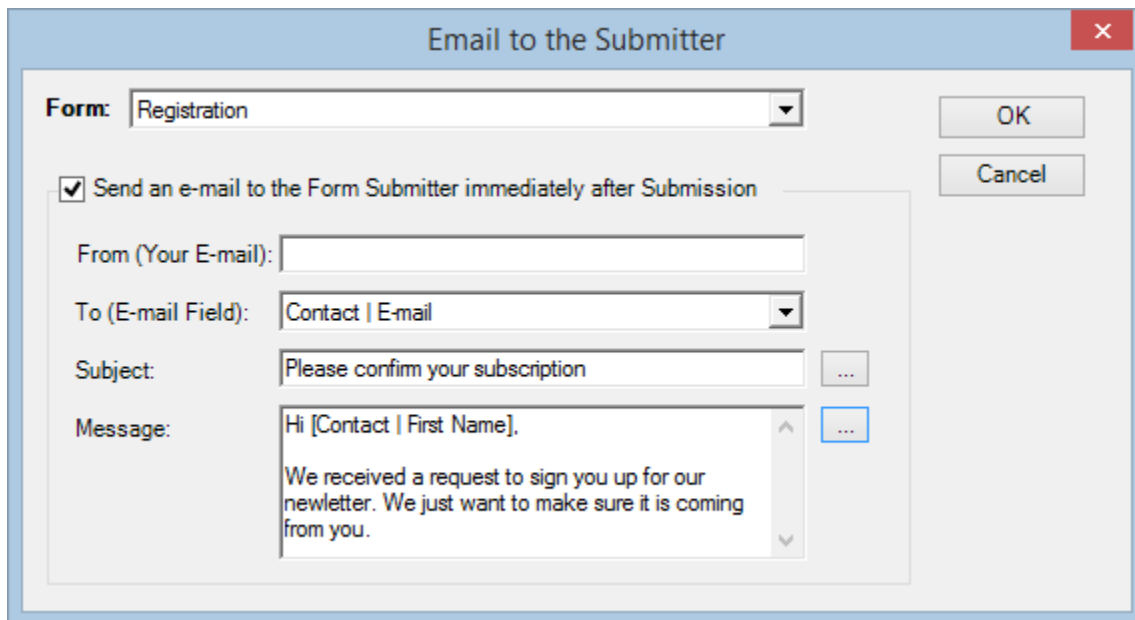
Click the *Edit message...* button to edit the default message.



### The Confirmation e-mail

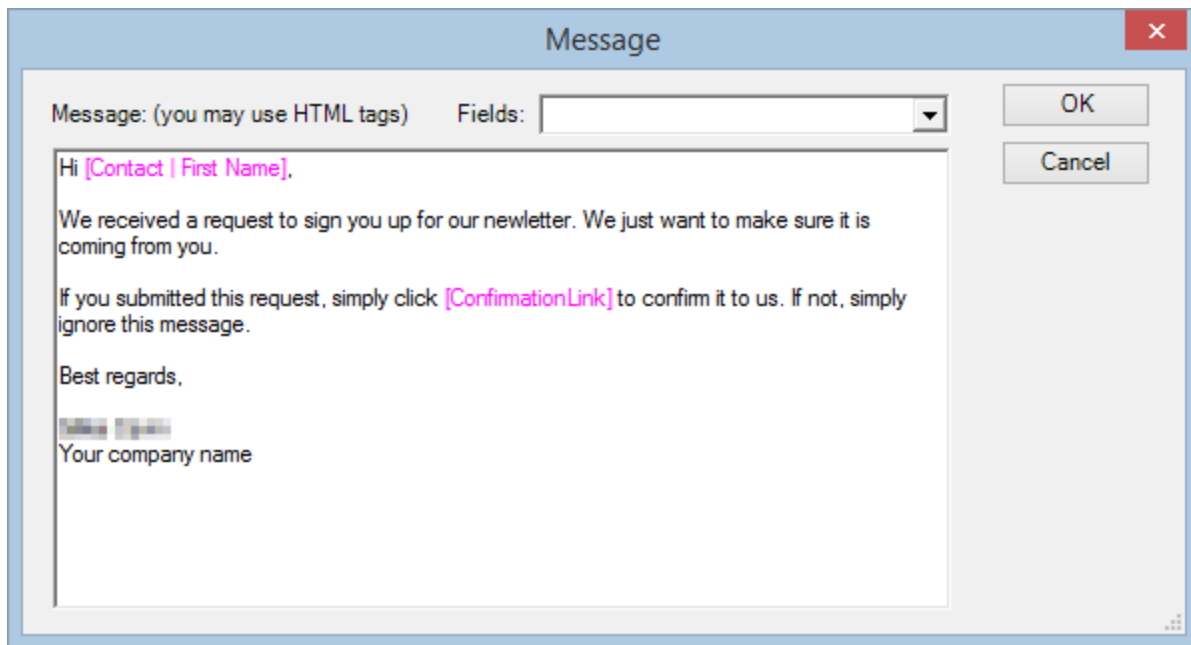
As explained above in the process, an e-mail message is sent to the person who filled out the form immediately after submission.

To define the parameters of this message, click the *E-mail Settings* button.



In this window, you need to enter the e-mail address you want the message to be coming from. You need to select the field of your form that contains the e-mail address of the person who opted in, the subject and content of your message.

While editing the subject or the content (after clicking the ... button), you may include data from the submitted form. The field placeholders are shown in pink.



Since the message needs to contain the confirmation link, the [ConfirmationLink] placeholder is required. It will be replaced by a link with the text “this link”.

If you want to fully control the confirmation link and are familiar with HTML, you can use the placeholder [ConfirmationURL] which will simply insert the URL in the message. You can then create your custom link this way: <a href="[ConfirmationURL]">Your custom text</a>.

## Contacting support

Support is provided through our ticket system at <http://support.exponencial.com>.

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