

Optin Manager

How do I set up Optin Manager?

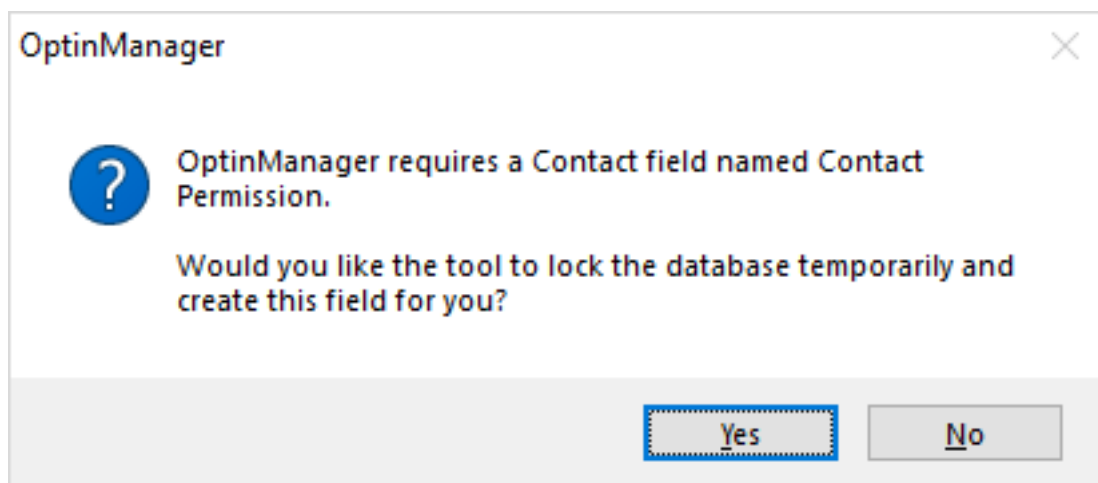
In order to use Optin Manager, a custom field and dropdown menu must be created. This operation can only be performed on the machine hosting the database.

If you are hosting the Act! database on your own machine, please install Optin Manager on your computer and proceed to the **Initial Setup** section below. If your Act! database is hosted on a different computer such as a server, or shared PC, then you will need to perform the Initial Setup on a machine that has direct access to this server. If your database is hosted by a third party hosting company and you are using a remote database, please contact your hosting provider so they can assist you with the initial set up. Once the steps in the Initial Setup section have been performed, you may move on to the Configuration section.

Note: Please create a backup of your database prior to beginning with the initial setup section.

Initial Setup

- Install Optin Manager on a workstation machine that has direct access to the server hosting the database.
- After logging in to Act!, you will be presented with the Optin Manager activation window. Enter your license key and click the Add button to add your Act user to the licensed users list.
- If logged in as an Administrator, you will be prompted to create a custom field. Click **Yes** to lock the database and create the field automatically. If you already have a character field in the database that you have used previously to record Contact permissions, click No and select this existing field as described below in the article.

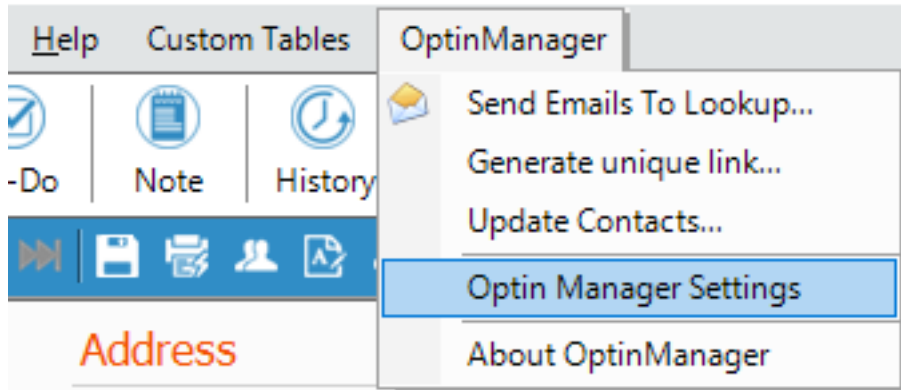


- Once the field is created, please add the "Contact Permission" field to your Contact layout. To learn more about adding fields to your layout, please refer to the following article: [Article ID: 1011](#)

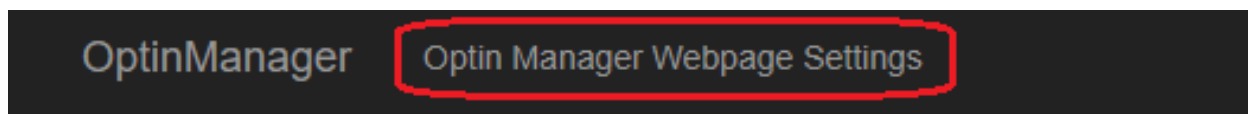
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Configuration and Sending Emails

- Once logged in to the database, create a lookup of Contacts whom you wish to send the contact permission email to.
- Click the menu **Optin Manager > Optin Manager Settings**



- In the **Account ID** field, enter your account ID. This ID can be retrieved by creating an account on www.optinmanagement.com. Click the **Create Account** link to visit the Optin Manager website.
- Once registered and logged in, click the **Optin Manager Webpage Settings** link near the top of the page.



You are logged in as **user@domain.com**

To edit your OptinManager webpage settings, click [here](#)


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- On this page, you can enter your company name, URL, and a custom message that your Contacts will see once they click on the unique link sent by Optin Manager. You can also upload a company logo. Click the **Copy** button to copy the ID to your clipboard. Paste this ID in the **Account ID** field in the Optin Manager Act! plugin.

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Optin Manager Webpage Settings

Optin Manager Page Settings.

Account ID	00000000-0000-0000-0000-000000000000
	<input type="button" value="Copy"/>
Company Name	Untitled Company
URL	www.domain.com
Logo	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Upload"/>
	Preview:
	
Message Text	Please use the following buttons to confirm or deny e-mail communication with you.

- If you did not allow Optin Manager to create a permission field at startup, and you wish to use another field, click the **Act! Field Settings** tab, and select the appropriate field from the **Permission Field** dropdown.
- In the **Value Settings** section, enter the values that will be used when

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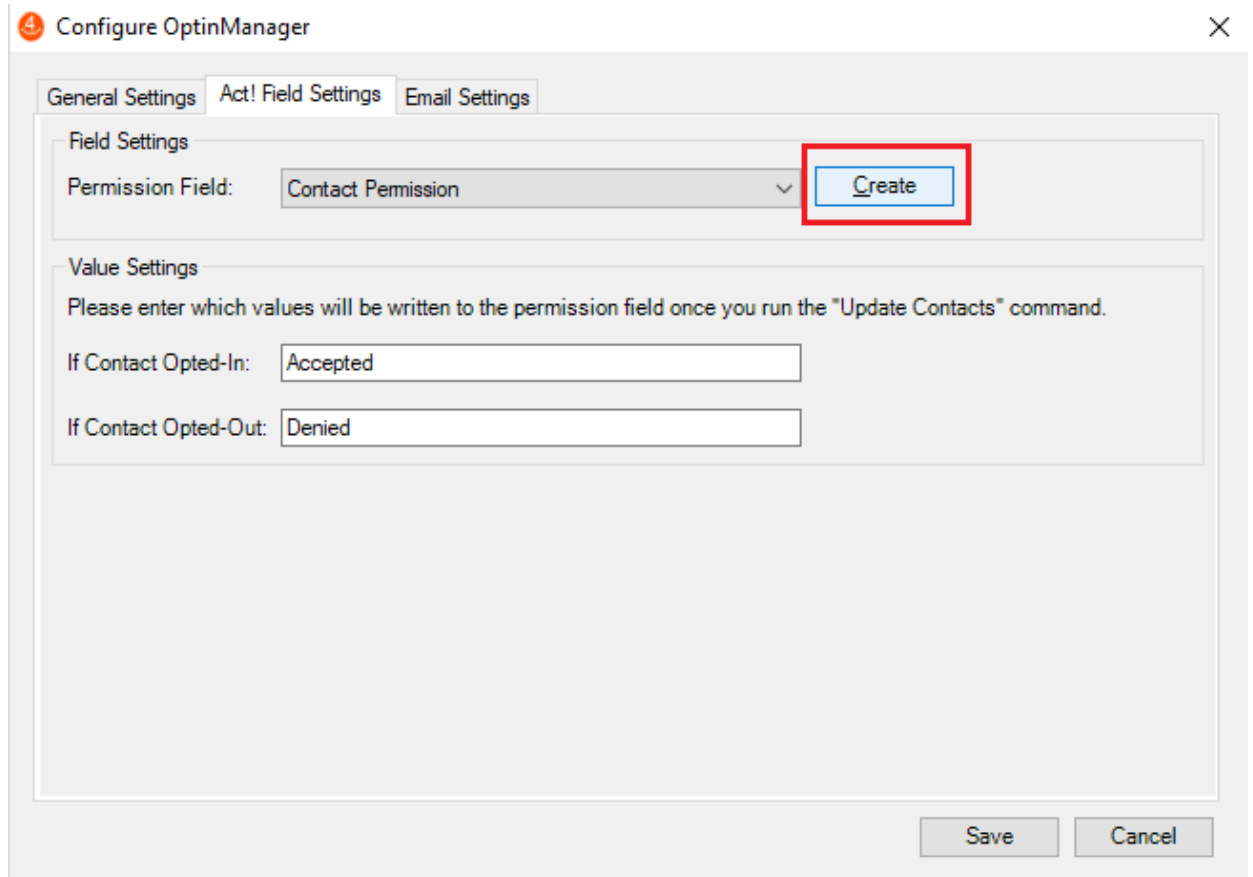
(c) 2020 ActAddonShop <kqc@keystroke.ca> | 2020-10-26 02:03

URL: <http://kb.actaddonshop.com/index.php?action=artikel&cat=11&id=27&artlang=en>

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running the update command and downloading your Contacts' choices. By default, these values are "Accepted" and "Denied"

- If you wish to create the Contact Permission field automatically, click the **Create** button.



The screenshot shows a dialog box titled "Configure OptinManager" with a close button (X) in the top right corner. It has three tabs: "General Settings", "Act! Field Settings" (which is selected), and "Email Settings".

Under the "Act! Field Settings" tab, there are two main sections:

- Field Settings:** A dropdown menu labeled "Permission Field:" is set to "Contact Permission". To the right of this dropdown is a blue button labeled "Create", which is highlighted with a red rectangular box.
- Value Settings:** A text area with the instruction "Please enter which values will be written to the permission field once you run the 'Update Contacts' command." Below this are two input fields:
 - "If Contact Opted-In:" with the value "Accepted" entered.
 - "If Contact Opted-Out:" with the value "Denied" entered.

At the bottom right of the dialog box, there are two buttons: "Save" and "Cancel".

- In the **Email Settings** tab, enter your SMTP mail server settings. Since you will likely be sending out hundreds of emails, it is recommended that you sign up for an email service, such as www.sendgrid.com

If you wish to use your internal email server settings, please contact your email provider/IT Administrator and they should be able to assist you with entering the correct settings.

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The screenshot shows the 'Configure OptinManager' dialog box with the 'Email Settings' tab selected. The 'Send Email As' section contains the following fields: 'Email Address' (user@domain.com), 'SMTP Username' (user@domain.com), 'SMTP Password' (masked with dots), and 'Outgoing Mail Server (SMTP)' (mail.domain.com). The 'Outgoing Mail Server Port' is set to 25. 'Email Encryption' is set to 'None'. The 'History Settings' section has 'History Type' set to 'E-mail Sent'. 'Save' and 'Cancel' buttons are at the bottom right.

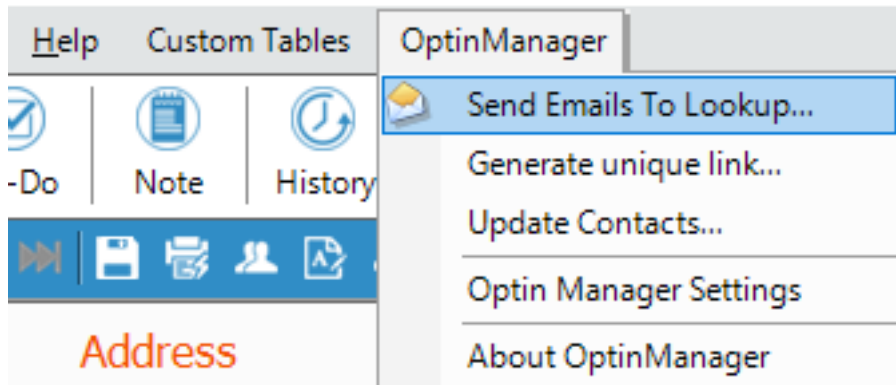
- Click the **Email Delivery** tab to define the settings which can be used to prevent your emails from being picked up by your email provider's anti-spam filters. It is highly recommended to use these settings if you are using your personal email server and not a email delivery service such as SendGrid. Below is a sample of the settings which should work with most servers but it is recommended to work with your IT department in order to determine the best settings for your email server.

The screenshot shows the 'Configure OptinManager' dialog box with the 'Email Delivery' tab selected. The 'Delay each email by' is set to 1 seconds. The 'Split the sending of emails in smaller batches' checkbox is checked. The 'Batch Settings' section has 'Batch size' set to 25 and 'Delay between each batch' set to 30. A note at the bottom states: 'Recommended batch size is 25 emails/batch with 30 second delay between batches'.

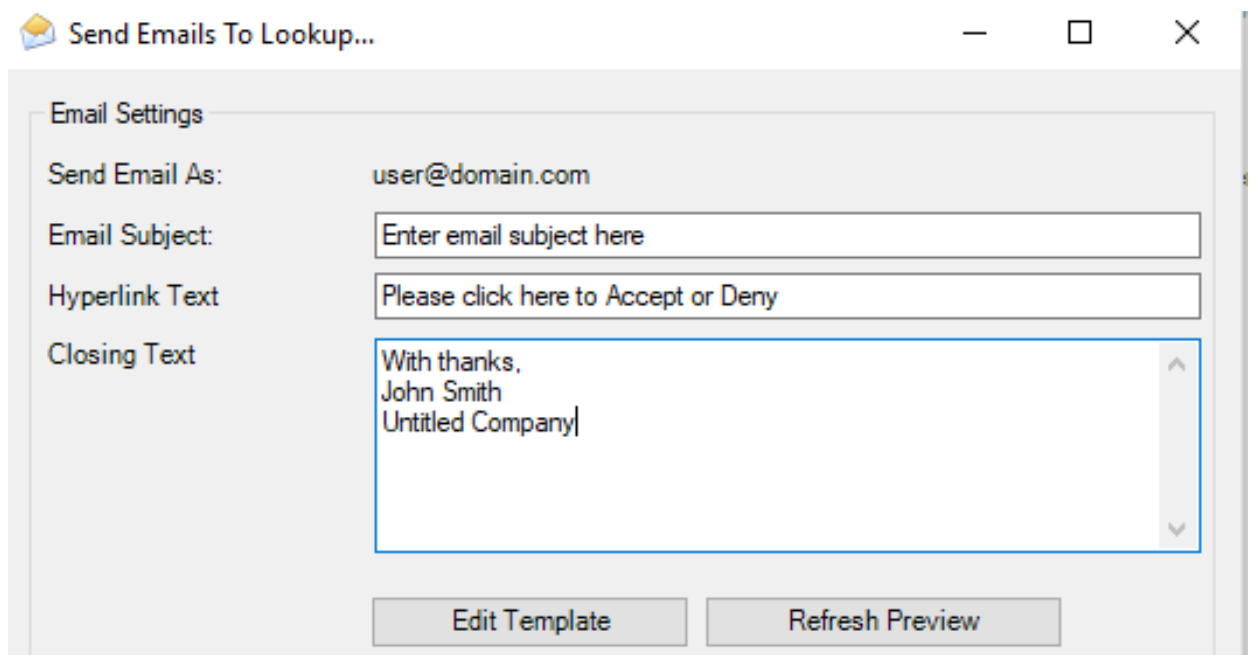
- Click the **Save** button to save your settings.

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- Perform a lookup of Contacts that you will be sending the permission email to. If this is your first time using Optin Manager, it is highly recommended that you test with your own Contact record by clicking **Lookup > My Record**
- Once a lookup is complete, click **Optin Manager > Send Emails To Lookup**



- Enter an **Email Subject** and **Signature** which will be used to send the email to your contacts. If you wish to modify the hyperlink text that the user will click, enter it in the **Hyperlink Text** field. Click the **Refresh Preview** button to preview the email message.



- If you wish to change the content of the email, you may click the **Edit Template** button, which will open up the email template for editing.

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Send Emails To Lookup...

Email Settings

Send Email As: user@domain.com

Email Subject: Enter email subject here

Hyperlink Text: Please click here to Accept or Deny

Closing Text: With thanks,
John Smith
Untitled Company

Edit Template Refresh Preview

- Your email template will open up in notepad. If you wish to include any Contact fields in the template, please enclose the field name in angled brackets <>. See highlighted sample below for an example for the Contact name field.

EmailTemplate.txt - Notepad

File Edit Format View Help

Dear <Contact>,

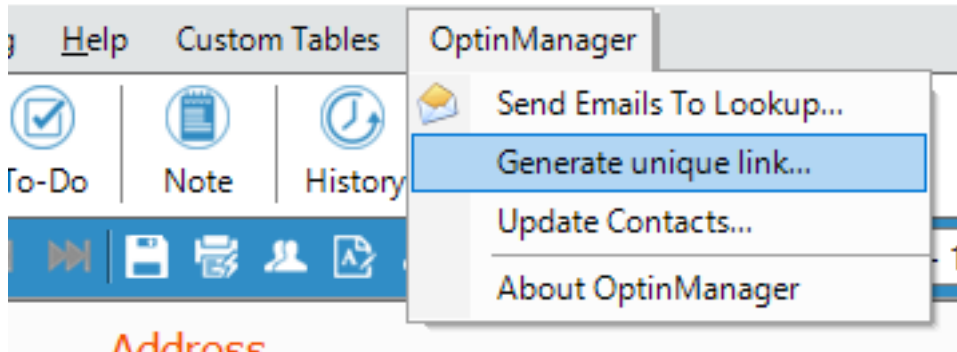
Please use the following link to confirm or deny e-mail communication with you - it only takes a moment.

- After making the necessary changes, save and close the notepad file and click the **Refresh Preview** button to confirm the changes were saved successfully.
- Once satisfied with the template, click the **Send Emails** button. On the following popup, select whether you wish to send emails to the current contact, current contact lookup, or all contacts in your database. For testing, it is recommended that you lookup your own Contact record by clicking the menu **Lookup > My Record** and then selecting the **Current Contact**

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option. Once satisfied, you can send the email to the rest of your Contacts. Each contact will be sent a unique link which they can click to indicate if they wish to be contacted or not.

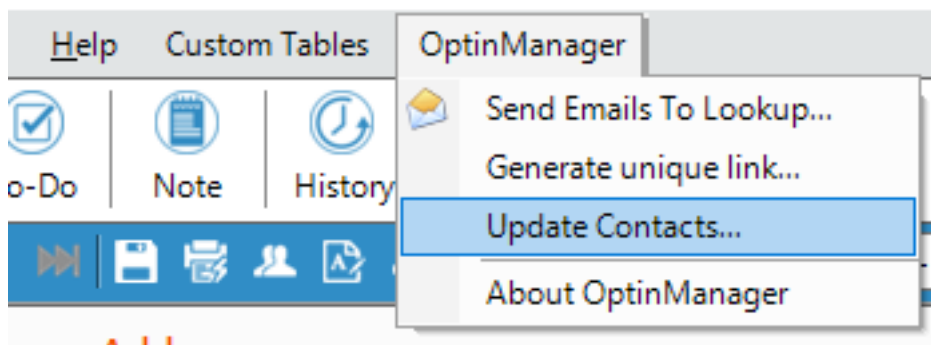
- If you need to retrieve the unique link for a particular Contact click the menu **Optin Manager > Generate Unique Link**



- After clicking this menu option, the unique link for that Contact will be copied to your clipboard. You may now paste this in an email and send it to the Contact manually.

Updating Contact Permissions

- Once you have sent emails to your contacts, it is recommended to **Update** your database occasionally and download their choices.
- Click the menu **Optin Manager > Update Contacts**.



- All contact responses will be downloaded one by one. The **Contact Permission** field will be updated to reflect their choices and a history record will also be created for each contact.

Unique solution ID: #1027

Author: Ahsan

Last update: 2018-05-15 17:07