

# Opt in/opt out, mailing lists

Following the legislation of the GDPR, you must be able to document that persons receiving mass emails, such as newsletters, from your company have explicitly accepted to receive these e-mails. Furthermore, you must document exactly what has been accepted in agreeing to receive mass mails and/or newsletters. In addition to providing documentation of consent, it is valuable to be able to document *when* a customer has opted in or opted out of mailing lists, but this is not required. webCRM sees this time stamp as best practice and strongly recommends that our customers ensure its implementation.

In the webCRM-solution, registrations can be handled by landing pages or the inbound module if you have a PLUS or ENTERPRISE license. The principles are generally the same. Below you will find the guide for using landing pages for registrations. If you are using or want to use the inbound module, you will find a guide for this [here](#). The benefit of using the inbound module for this purpose is that it enables more options in terms of design and layout and can be created as part of your website. However, landing pages are created inside of webCRM and require less technical competence and will instead perform as a link from your website.

Unsubscribing from newsletters or mailing lists are features that are handled using a direct link to a landing page from an email, which is the norm.

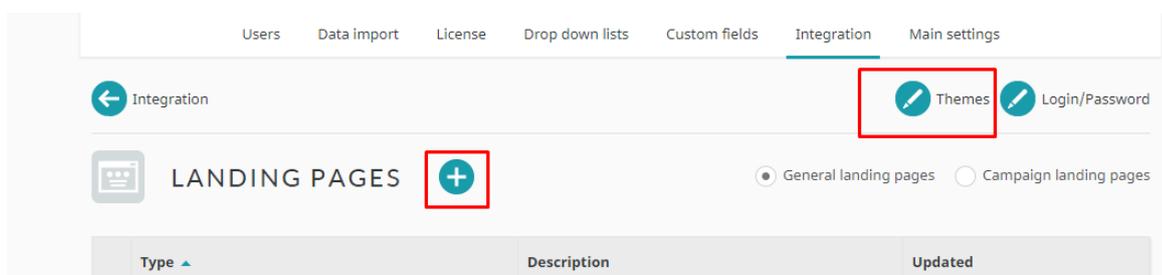
## Subscription from a landing page

To set up the landing page it is required that your webCRM user access level is 99.

Go to **Configuration → Integration → Landing pages**.

In the top right corner there is a button called **Themes**. From this menu, the design of the landing page is configured as a theme that can be recycled for other landing pages or more themes can be created for different landing pages.

When you are done setting up the theme, click the **Plus-icon** to create a new landing page.



Choose the landing page type called "New contact (website)" and give the landing page a description.

On the following view you can configure specific parameters for the landing page e.g. when the unique landing page link will expire - which in this case we suggest setting it to "never expires". In addition, you can define what the text of the submit-button should be named and what message people will receive after submitting.

The screenshot shows a configuration form for a landing page. Key elements include:

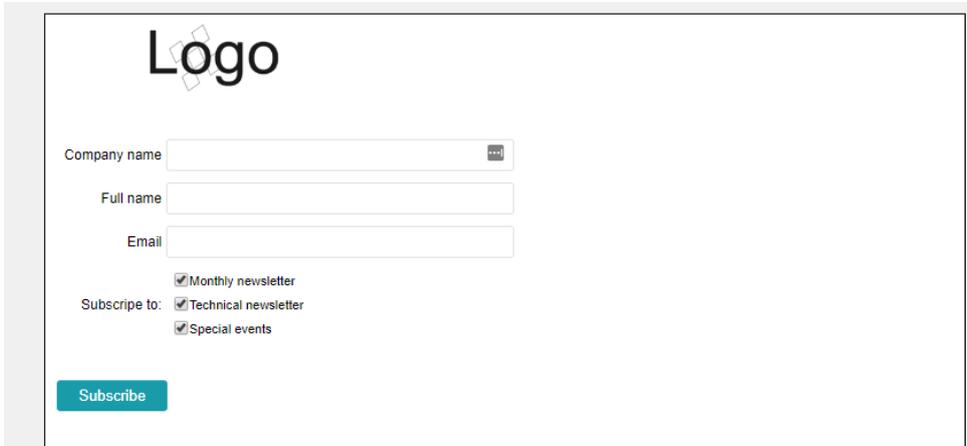
- Description:** A text field containing "Subscribe to newsletter".
- Page:** A dropdown menu set to "Active".
- Send email notice to:** A dropdown menu set to "None".
- Submit button text:** A text field containing "Subscribe".
- Message after submitting:** A text area containing "Thank you for subscribing. The newsletter is sent once a month."
- Font:** A dropdown menu set to "12 px normal".
- Theme:** A text field containing "Tema!".
- Contact:** A dropdown menu set to "Create new/Add to existing".
- Approve before save:** A dropdown menu set to "No".
- Time zone:** A dropdown menu set to "(UTC+01:00) Brussels, Copenhagen, Madr".
- Create:** A dropdown menu set to "Activity".

Below are the data fields required for a person to fill out is setup when subscribing to the newsletter. The fields could be Organisation name, Person name, email and other relevant information. Remember to add the fields for one or more mail subscriptions if you offer different ones.

Input fields	Label(Mandatory) // Comment(Optional)	Default input(Optional) ⓘ
11010 Organi. Name	Mandatory	Company name
13040 Person. Full name	Mandatory	Full name
13110 Person. Email	Mandatory	Email
13350 Person. Newsletters	Optional	Subscribe to:

- Monthly newsletter
- Technical newsletter
- Special events

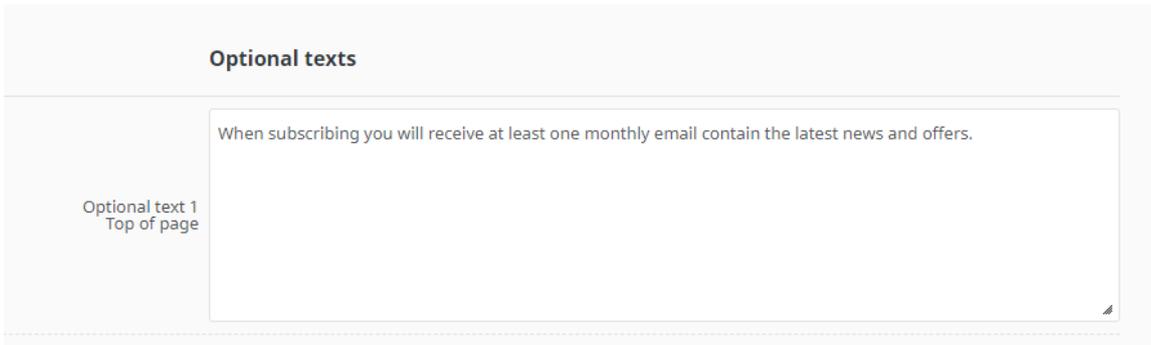
When prechecking the Newsletters the value will be filled out when the person visiting the landing page and will thus have to actively opt out instead of actively opt in. For a person visiting the landing page it will look something like this dependent on your personalised landing page theme and the configured data fields:



The screenshot shows a landing page form with the following elements:

- A logo placeholder labeled "Logo" with a faint watermark.
- Input fields for "Company name", "Full name", and "Email".
- A "Subscribe to:" section with three checked checkboxes: "Monthly newsletter", "Technical newsletter", and "Special events".
- A blue "Subscribe" button.

It is possible to add text to the landing page by writing inside the empty boxed in the bottom of the landing page configuration page.



The screenshot shows the "Optional texts" configuration page with the following elements:

- A header section titled "Optional texts".
- A text area labeled "Optional text 1" with the sub-label "Top of page".
- The text area contains the text: "When subscribing you will receive at least one monthly email contain the latest news and offers."

Besides the information on the landing page needed to fill out by the subscriber it is possible to setup "hidden data" enabling you to log further information regarding the subscription to an activity. From "hidden data" logging date/time, source of subscription and noting the wording of the accepted text are all readily configurable. The text can either be found on a website providing a link to the landing page or exist directly on the landing page. A configuration could be:

Hidden data	Value
Must be different from input fields	
15010 Activi. Date and hour	0 + Hours
15050 Activi. Action	Nyhedsbrev tilmelding
15060 Activi. Status	Complete
15070 Activi. Description	Subscription from landing p
15150 Activi. Wording of subscription	Yes, I am hereby subscribing to the newsletter.

It might be a good idea to be able to choose an Action for both subscribing and unsubscribing a newsletter on "activities" to easily find the different ones and create Reports.

In addition, it might also be a good idea to set the "mode" of the wording field to "Read only", to ensure the text will not accidentally be changed by a user later on. This is done at **Configuration → Custom fields → Activities**

Memo	4	Wording of subscri	Read only
Label above:	None		

Logs
<p><b>Add log entry</b></p> <div style="border: 1px solid #ccc; height: 40px;"></div>
<p><b>Logs</b></p> <p>11-03-2018 19:52 Landing page</p> <hr/> <p>Company name: Company A/S Name: Carsten Werge Email: werge@carsten.com Subscribe to:: Monthly newsletter Special events</p>

Tilmeldingsordlyd
Send forslag antal <input type="text" value="0"/>
Opringning antal <input type="text" value="0"/>
Wording of subscription
Yes, I hereby subscribe to the monthly newsletter containing news and offers.

At the top of the landing page is a link to the specific landing page that can be used on a website and other sites from where subscription must be possible.

LANDING PAGES   <i>New contact</i>
<p>HTML code for your webpage</p> <pre>&lt;a href="https://v5.b2bdoc.net/App/Start.aspx?awb=esogqakiaeeoaeimqaeukomagom"&gt;Click here&lt;/a&gt; Or &lt;a href="" onClick=" window.open('https://v5.b2bdoc.net/App/Start.aspx?awb=esogqakiaeeoaeimqaeukomagom', '_blank', 'toolbar=0'); return false;"&gt;Click here&lt;/a&gt;</pre>

## Unsubscribing newsletters from a landing page

Unsubscribing newsletters from a landing page is like subscribing. Unsubscribing landing pages will be accessed directly from a link inside the originally subscribed to newsletter from where the customer will be able to update subscriptions or automatically unsubscribe from the specific newsletter. The landing page for unsubscribing is of the type "edit own data".

This type of landing page must be configured to create an activity as well.

The landing page can be configured to be more personalised by adding your own logo and changing the design to look more personalised.

Below the top logo it is possible to add personal information that will not be editable. All desired/possible data will be shown below the line and is setup by a webCRM administrative user who decides whether the data is for viewing or editing. When the customers have updated his or her information and clicked the blue button (the text can be edited for the button) data in webCRM will be instantly updated.

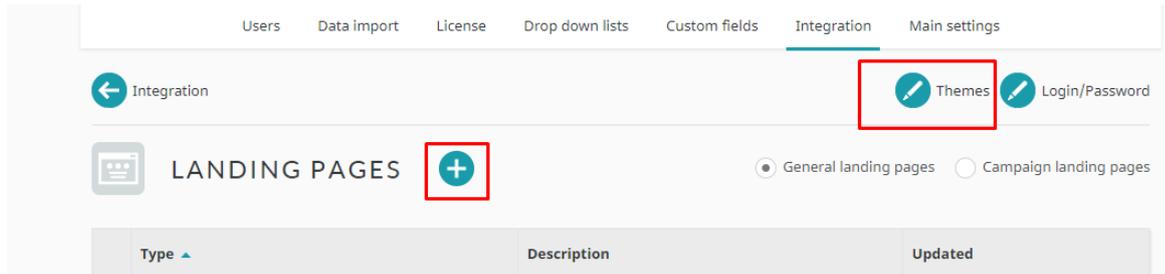
## Setting up the landing page

To setup the landing page it is required that the webCRM user is allowed access level 99.

Go to **Configuration → Integration → Landing pages**.

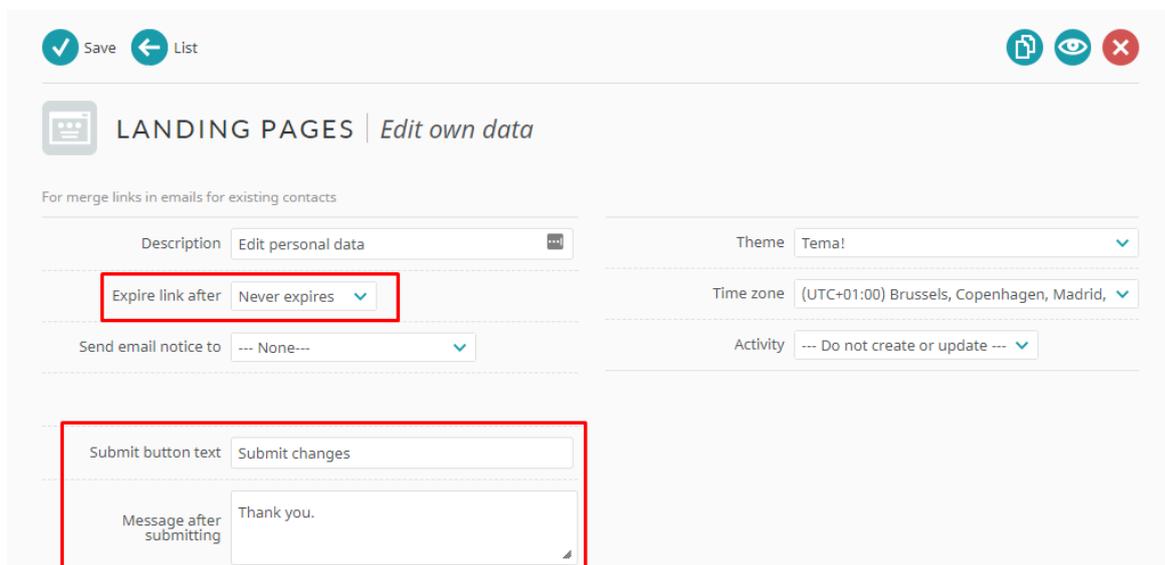
In the top right corner is a button called **Themes**. From that menu the design of the landing page is configured as a theme that can be recycled for other landing pages or more themes can be created for different landing pages.

When you are done setting up the theme click the **Plus-icon** to create a new landing page.



Choose the landing page type "edit own data" and give the landing page a Description to be able to differentiate between landing pages.

On the following view you can configure specific parameters for the landing page e.g. when the unique landing page link will expire which in this case we suggest setting it to "never expires". In addition, you can define what the text of the submit-button should be and the message after submitting.



It is possible to configure that submitting triggers creating an activity or an email being sent to a specific user. If the landing page is meant to only allow view and update personal data, it is typically not necessary to trigger any such events.

Below these fields you will find a big white box from where the specific data fields are added to the landing page as either "Read only", "Read/write" or "Mandatory". It is possible to allow access to overviews from webCRM as well.

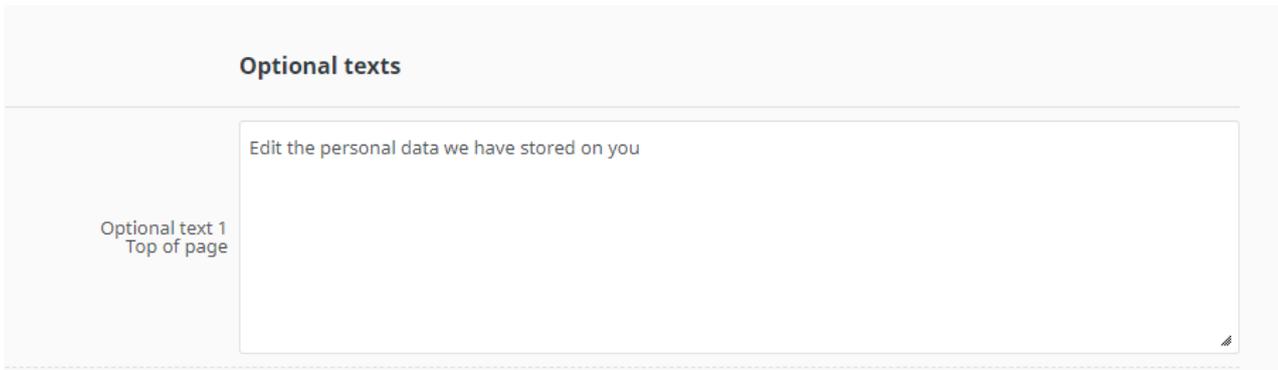
Data fields		Label(Mandatory) // Comment(Optional)	Default input(Optional)
11070 Organi. Responsible	Read only	Responsible	
13040 Person. Full name	Read only	Full name	
13110 Person. Email	Read/Write	Email	
13100 Person. Mobile telephone	Read/Write	Mobile	
13090 Person. Direct telephone	Read/Write	Direct telephone	
13106 Person. Skype	Read/Write	Skype	
Image	Upload / De	Photo	

Remember to name all fields and i.e. write a comment. The boxes furthest to the right can be used to add a standard value that will be both be shown and saved to the customer's data when clicking the submit button. In the case of GDPR request it is probably not suitable.

In addition to the shown data fields you can setup a range of hidden data fields that e.g. can be used to add notes/information about the updating of data to the log field on a person or adding a date to a date field. The "hidden fields" are found below the viewable fields.

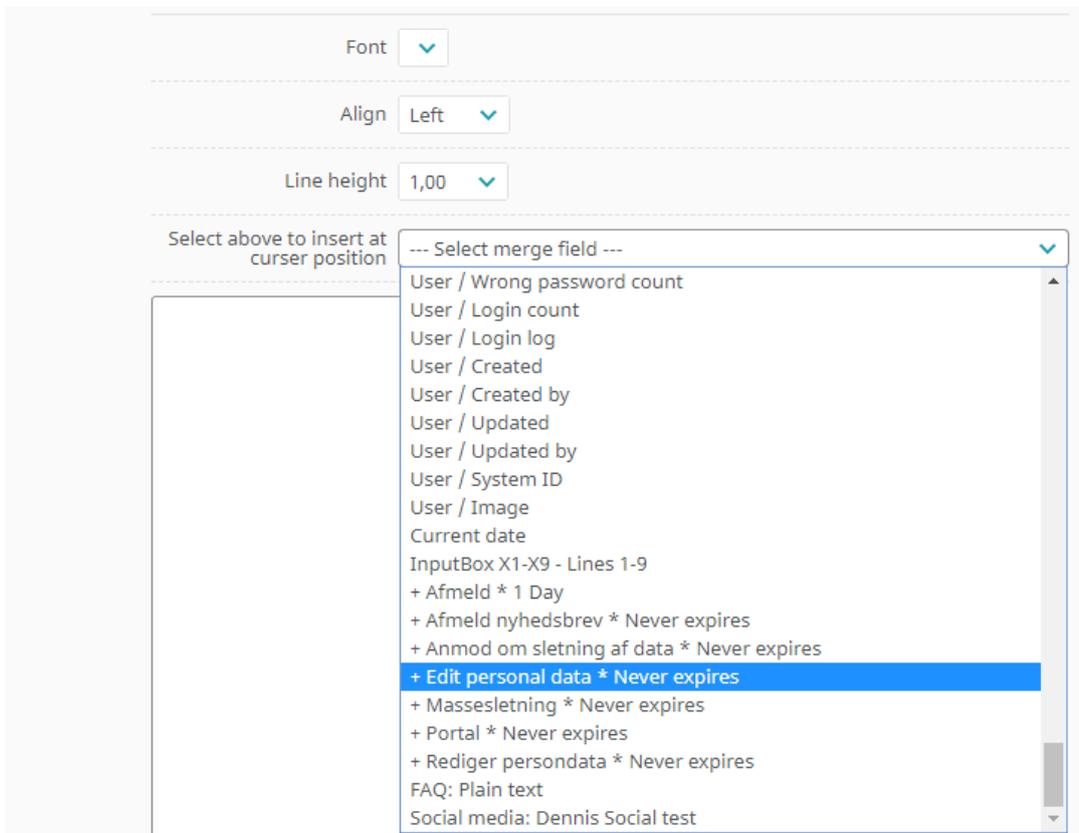
Hidden data	Value
Must be different from input fields	
13119 Person. Log	Updated from landing page.
--- None ---	
--- None ---	

At the bottom of the configuration page are several text boxes that will display text on the landing page. Normally the text here is used as help text or explanatory text to guide the person through the landing page and perhaps contain company contact details.



## Access to the landing page

The customer can get access to the landing page through a unique link generated by webCRM. The link can be send out as a single email or mass mail using email templates containing the merge field for the landing page. Landing page merge fields are found the bottom of the list of merge fields.



The link will add the description of the landing page as a clickable link (here: Edit personal data) and can be changed from the configuration page for the specific landing page.

In addition to the direct link it is possible to grant users access to this type of landing pages using a portal page from where the customer can login and get access to the data without having to use the direct link. Find the guide to landing pages and portals [here](#).