

Email2CRM – Subscription Management

V2.0

Integrated email messaging with web analytics



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Subscription Management

Subscription Management allows list members to control which lists they subscribe to, update their personal information, and indicate why they are opting out of lists in your Dynamics CRM system.

These features include:

1. Select which Marketing Lists are available for list members to opt-in and/or opt-out.
2. Immediately updates list member records in CRM, adding or removing them from lists.
3. Updates the corresponding list in VerticalResponse by adding or removing them from the list the next time that list is synced.
4. Simply select the public status of the Marketing List record in CRM, sync the list, then include your subscription management link in your outgoing Vertical Response emails.
5. Profile Management feature allows you to select which, if any, personal information fields list members are able to update in CRM.
6. Survey questions allow you to decide whether or not you want list members to be able to give reasons as to why they are opting out of lists. The questions can be customized.

What is the upside? Your list members can manage the emails that they receive from you so they get just what they want and no more/ no less. And more importantly they won't be inclined to totally unsubscribe from all mailings if they are getting more than they want. Your clients will also have the flexibility to update their personal information, as well as indicate why they are opting out of lists.

CRM Configuration

There are three fields to set inside of the Marketing List record to configure it for list member management. By default, lists are set to not be included in Subscription Management.

Include in Subscription Management – This will expose the list to the subscription management page for those email recipients that are members of that list.

Allow Optins – This will expose the list to email recipients that are not members of this list but you want to give them the option of signing up for this list.

Display Name – This is the name that will display as the List Name on the subscription management page.

The screenshot shows the 'Marketing List: AccountTest' configuration page in the Email2CRM application. The 'Email2CRM' tab is selected, and the 'Email2CRM Subscription Management' section is highlighted with red boxes. The 'Display Name' field is set to 'Account Test', 'Allow Optins' is set to 'Yes', and 'Include In Subscription Management' is set to 'Yes'. Other fields include 'Sync Now' (Sync button), 'Sync Mode' (Full Sync), 'Email2Crm Config' (Email2CrmLicense), 'VR Unit', 'Sync to VR' (Yes/No), 'VR Id' (250169961), 'Bounced' (0), 'Member Count in VR' (0), 'Unsubscribed' (0), 'Duplicates on list' (0), and 'Invalid Text' (0).

Who should not or when should you not use this feature? If you want to control access to lists you should not use this feature. For example if you have list like – partners, end user members, vendors you probably wouldn't want end user list members signing up for the partner list. However, if you have three newsletters for your list members – Daily, Weekly, Monthly for example, they could select their mailing frequency by signing up for the ones that fit their activity level.

Subscription Administration

Start by logging in to the Email2CRM hosting portal – <http://email2crm.crminnovation.com>



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Email2CRM Login

Please enter credentials or click 'Register Here'.

User Name:

Password:

[Register Here](#)

After logging in, select the appropriate account by clicking 'Select' next to the account. After the correct account is highlighted, click on 'Open Account'.



CRM Innovation

[Sign Out](#)

Select an account and click 'Open Account' to sign in.

Dynamics CRM User Name	Dynamics CRM Organization	Vertical Response User Name	Select an Account
teammember1	ibiz	support@crminnovation.com	Select
teammember1	ibiz	events@iamcp-kc.org	Select
administrator	vr	michael@crminnovation.com	Select
email2crm	ibiz	jerry@ibizinitiatives.com	Select



Click on 'Subscription Management Administration' link to be taken to the administration page.



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[Account Management](#)
[Sync All](#)
[Sign Out](#)

Please select a link.

[Add Google Analytics to your Email2CRM account](#)
[Subscription Management Administration](#)
[Update CRM Credentials](#)
[Update Customizations](#)
[Start your syncing service](#)
[Return to account selection](#)

You will then be transferred to the Subscription Administration page.



[Account Management](#) [Sync All](#) [Sign Out](#)

Copy the link below into the footer of your Vertical Response emails.

`Insert your subscription management link message here.`

[Return to AccountManagement](#)

Customization

Please enter welcome text and select logo (suggested size 300 * 300) for your list members to see in subscription management. After logo is selected and you have entered the welcome text, please press upload. Logo type should be .gif, .png, .jpg.

Profile Management

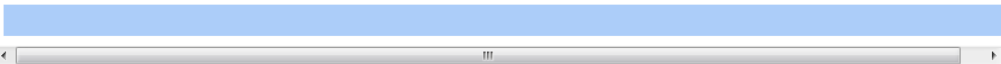
Do you want to enable Profile Management?

Please select fields that you will allow your users to update.

- | | |
|---|--|
| <input type="checkbox"/> Email Address | <input type="checkbox"/> ZIP/Postal Code |
| <input type="checkbox"/> First Name | <input type="checkbox"/> Country |
| <input type="checkbox"/> Last Name | <input type="checkbox"/> Work Phone |
| <input type="checkbox"/> Job Title | <input type="checkbox"/> Home Phone |
| <input type="checkbox"/> Company Name | <input type="checkbox"/> Mobile Phone |
| <input type="checkbox"/> Address 1 | <input type="checkbox"/> Fax |
| <input type="checkbox"/> Address 2 | <input type="checkbox"/> Marital Status |
| <input type="checkbox"/> City | <input type="checkbox"/> Gender |
| <input type="checkbox"/> State/Province | |

Survey Questions

Do you want to enable opt-out questions?



The Subscription Administration page allows you to customize your Subscription Management page for their list member email recipients. Under the 'Customization' section, you have the ability to set the welcome text and upload a company logo.

To set your welcome text, simply type the text that you want to appear on the subscription management page in the text box under the 'Customization' heading and click the 'Update' button.

To upload your company logo, click the 'Browse' button. You will have a window open where you can select a file. The recommended maximum image size is 300 * 300 pixels or smaller. Any image larger than 300 * 300 pixels may not format correctly on the screen. The file format of the logo should be .gif, .png, or .jpg. File types of .psd, .bmp, and .tif will be rejected. After you have selected the appropriate file, click 'Upload' button which will load the image.

Customization

Please enter welcome text and select logo (suggested size 300 * 300) for your list members to see in subscription management. After logo is selected and you have entered the welcome text, please press upload. Logo type should be .gif, .png, .jpg.



The administration page provides a section for profile management. Here, you can give list members the ability to update their personal information. Checking the 'Do you want to enable Profile Management?' checkbox exposes the profile management portion of the Subscription Management page to email recipients. Select the fields that you want to allow your list members to update by checking the checkbox by the respective field.

Checked fields will appear on the subscription management page with a textbox next to it that will contain the current value of the field. The list members can enter or edit their information in the textbox.

Profile Management

Do you want to enable Profile Management?

Please select fields that you will allow your users to update.

- | | |
|--|---|
| <input checked="" type="checkbox"/> Email Address | <input checked="" type="checkbox"/> ZIP/Postal Code |
| <input checked="" type="checkbox"/> First Name | <input checked="" type="checkbox"/> Country |
| <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> Work Phone |
| <input checked="" type="checkbox"/> Job Title | <input checked="" type="checkbox"/> Home Phone |
| <input checked="" type="checkbox"/> Company Name | <input checked="" type="checkbox"/> Mobile Phone |
| <input checked="" type="checkbox"/> Address 1 | <input checked="" type="checkbox"/> Fax |
| <input checked="" type="checkbox"/> Address 2 | <input checked="" type="checkbox"/> Marital Status |
| <input checked="" type="checkbox"/> City | <input checked="" type="checkbox"/> Gender |
| <input checked="" type="checkbox"/> State/Province | |

In the administration page you can elect to allow list members to select reasons for why they are opting out of lists. To enable opt-out surveys, check the ‘Do you want to enable top-out questions?’ checkbox. Then check the checkbox next to the text field and enter a question in the text field for each question you want to include in the survey. Click the ‘Update’ button to publish the survey. You may enter one to ten questions. Questions can be added, removed, or edited by updating/modifying the check boxes and/or questions and clicking the ‘Update’ button.

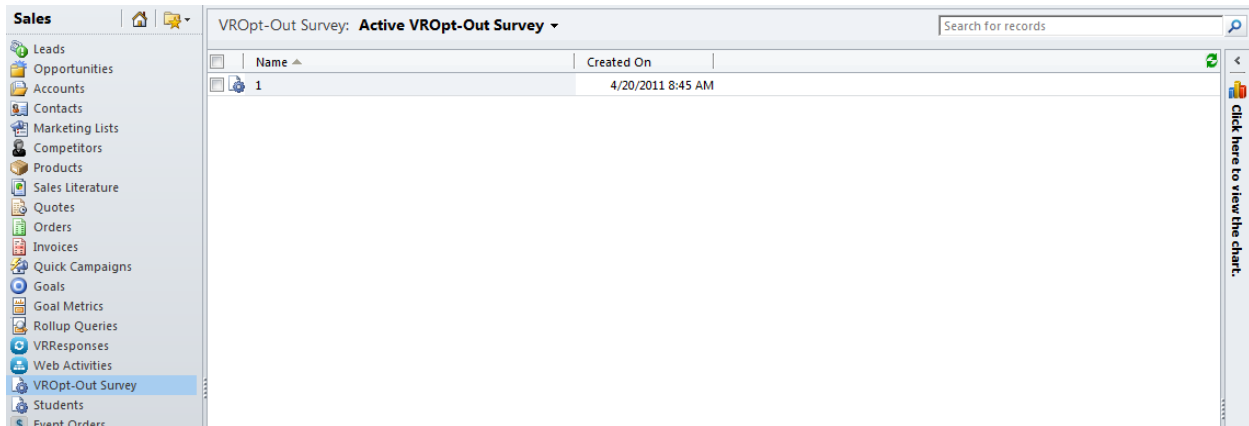
Survey Questions

Do you want to enable opt-out questions?

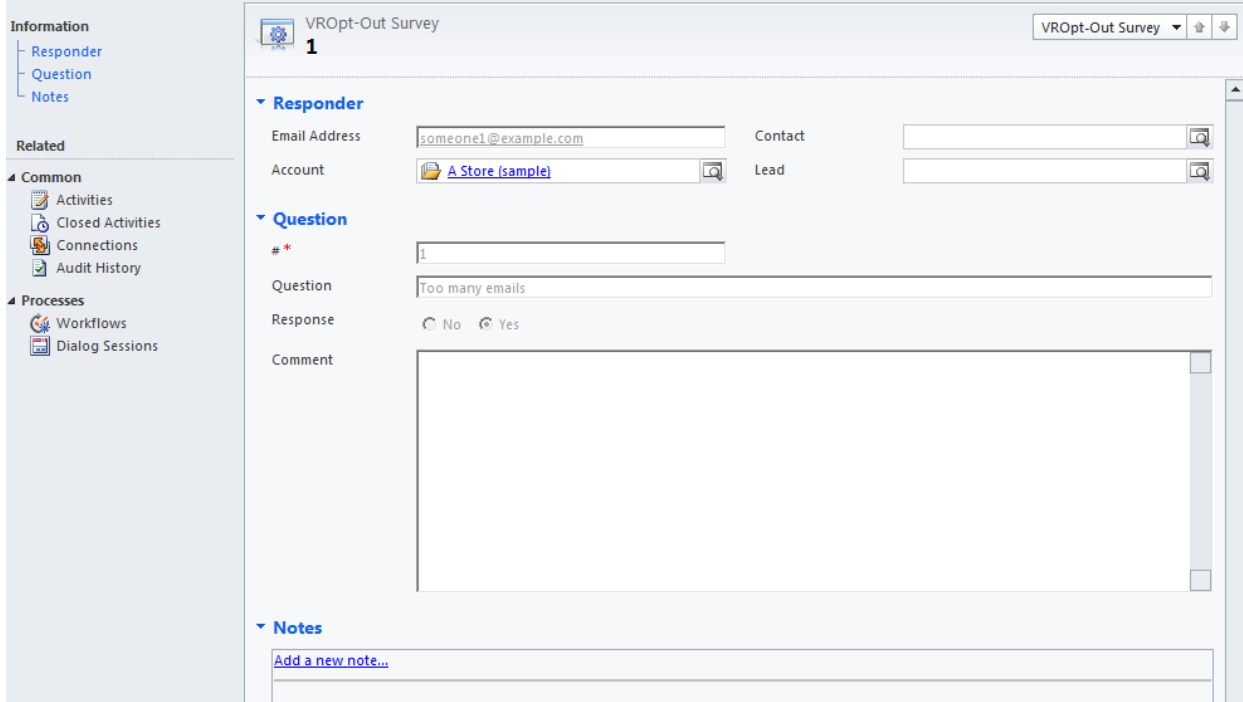
Please enter a question and select checkbox to activate.

<input checked="" type="checkbox"/>	1.	<input type="text" value="Too many emails"/>	<input type="checkbox"/>	6.	<input type="text"/>
<input checked="" type="checkbox"/>	2.	<input type="text" value="I am retiring"/>	<input type="checkbox"/>	7.	<input type="text"/>
<input checked="" type="checkbox"/>	3.	<input type="text" value="I am changing positions"/>	<input type="checkbox"/>	8.	<input type="text"/>
<input checked="" type="checkbox"/>	4.	<input type="text" value="I don't have time to read emails"/>	<input type="checkbox"/>	9.	<input type="text"/>
<input type="checkbox"/>	5.	<input type="text"/>	<input type="checkbox"/>	10.	<input type="text"/>

When the list member checks the appropriate question, the response will appear under VROpt-Out Survey view in CRM.

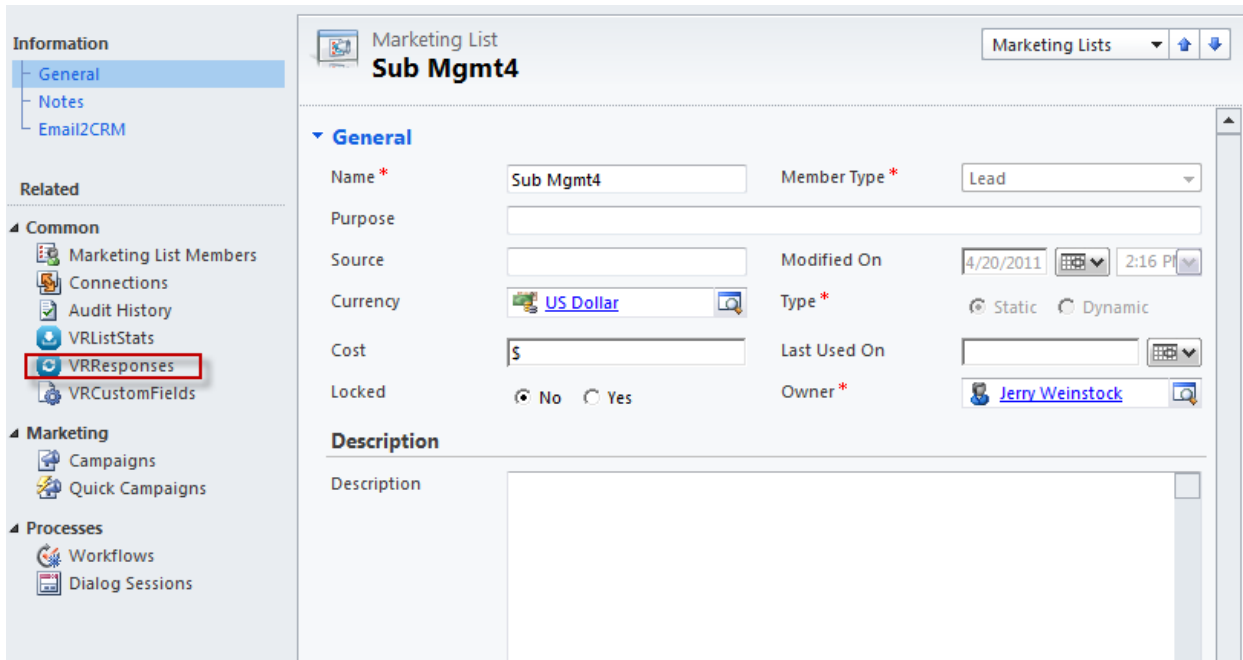


Click on a response record to see which reason was selected.

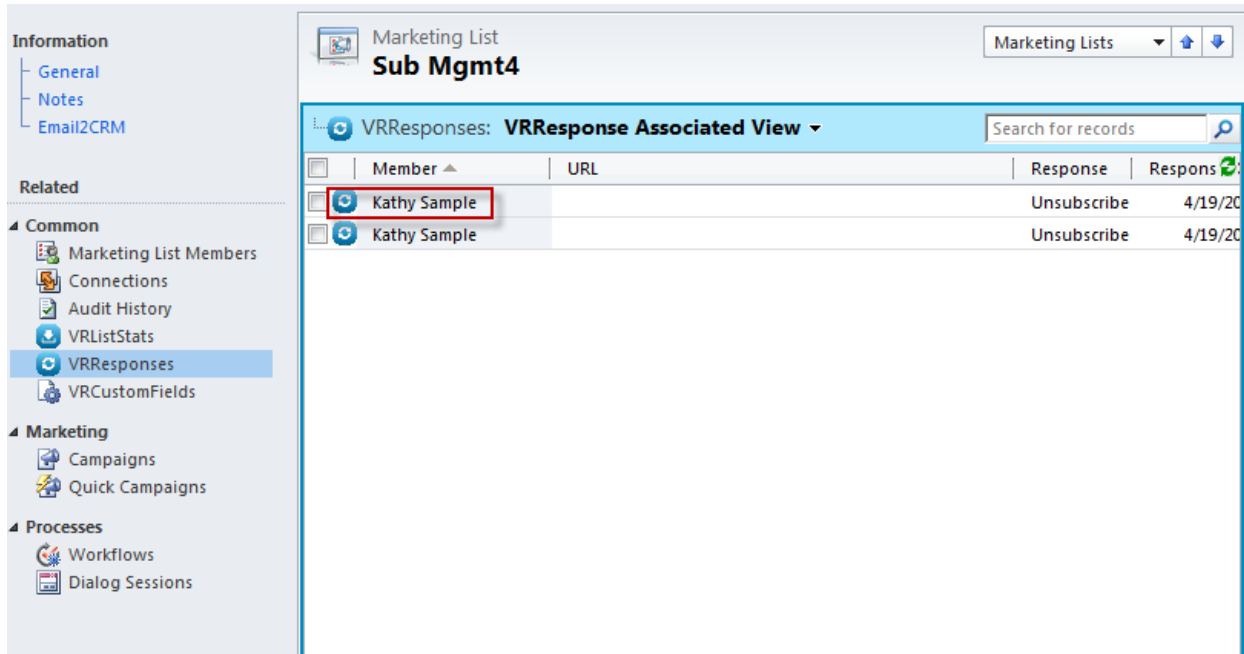


In this example, you can see that the list member selected the response of ‘Too many emails’.

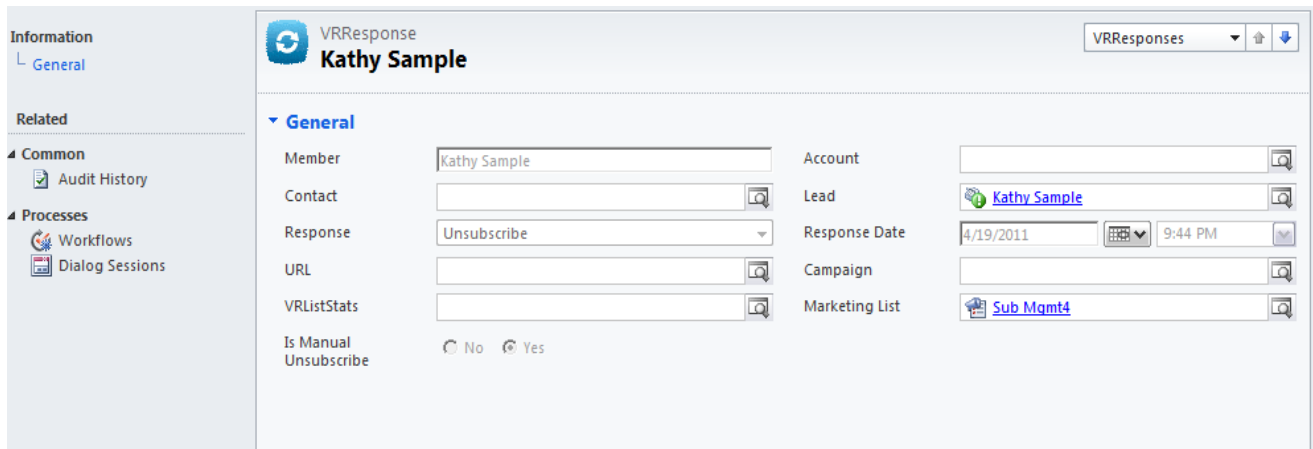
You can also bring up the record for the specific mailing list and see who has opted-out by selecting the record for the specific marketing list and clicking on VRResponses.



After you select VRResponses, you will then have a list of all list members that have opted-out of the list.



You can then open the list member record and a screen will appear with details about their opt-out activity.



After you have set your options for welcome text, profile management, and survey questions, you can publish your updates by selecting 'Update'. After the update is made, you can preview the management page by clicking the 'Preview' button.

You can see that the new image will display along with the welcome text that was entered.



You will also see the marketing lists that have been set up in the CRM system to 'Include in Subscription Management' and 'Allow Optins'.

Available Publications

To subscribe to a published list, select 'Yes' radio button. To unsubscribe from a published list, select 'No' radio button.

Subscribe	List Name	Description
<input checked="" type="radio"/> Yes <input type="radio"/> No	sub mgmt 1 test list	this is where the description goes that displays in sub mgmt.
<input checked="" type="radio"/> Yes <input type="radio"/> No	Test List 1 Display Name	This is a description of the List
<input checked="" type="radio"/> Yes <input type="radio"/> No	display name 8	list description
<input type="radio"/> Yes <input checked="" type="radio"/> No	Sub Mgmt4	this is the desc for sub 4
<input type="radio"/> Yes <input checked="" type="radio"/> No	Sub Mgmt is the best list to be on	No description available.

Unsubscribe From Publications Permanently

If you wish to unsubscribe from ALL publications, check the box.

Unsubscribe from all mailings permanently.

Update Subscription Preferences

If list member wants to unsubscribe from all mailings, they can check the 'Unsubscribe from all mailings permanently' checkbox and click 'Update'. This sets the 'Bulk Email' field on the Administration tab of their record in CRM to 'Do Not Allow'.

For the 'Personal Information' section, you will see the fields that were checked with their appropriate values. **Note: Fields 'First Name' and 'Last Name' do not appear for account records. Field 'Company Name' does not appear for contact records. Fields 'Gender' and 'Marital Status' appear for contact records only.**

Personal Information

Retrieve Your Profile:

To update your profile, edit your information and click the update button below.

Email Address:	<input type="text" value="ksample@example.com"/>	Zip:	<input type="text" value="66214"/>
First Name:	<input type="text" value="Kathy"/>	Country:	<input type="text"/>
Last Name:	<input type="text" value="Sample"/>	Work Phone:	<input type="text" value="8165553456"/>
Job Title:	<input type="text"/>	Home Phone:	<input type="text"/>
Company Name:	<input type="text" value="Example'R'Us"/>	Mobile Phone:	<input type="text"/>
Address Line1:	<input type="text"/>	Fax:	<input type="text"/>
Address Line2:	<input type="text"/>		
City:	<input type="text"/>		
State:	<input type="text"/>		

The survey questions will appear on the confirmation page after you leave the subscription management page.

Controls on the 'Preview' page are disabled, the preview form is read only.

Subscription Management Link

Login to the Email2CRM hosting portal – <http://email2crm.crminnovation.com>

Select your Account and then select the *Open Account* button



[Sign Out](#)

Select an account and click 'Open Account' to sign in.

Dynamics CRM User Name	Dynamics CRM Organization	Vertical Response User Name	Select an Account
teammember1	ibiz	support@crminnovation.com	Select
teammember1	ibiz	events@iamcp-kc.org	Select
administrator	vr	michael@crminnovation.com	Select
email2crm	ibiz	jerry@ibizinitiatives.com	Select



Then click the *Subscription Management Administration* link.



[Account Management](#)

[Sync All](#)

[Sign Out](#)

Please select a link.

[Add Google Analytics to your Email2CRM account](#)

[Subscription Management Administration](#)

[Update CRM Credentials](#)

[Update Customizations](#)

[Start your syncing service](#)

[Return to account selection](#)

If you have more than one VerticalResponse Account that is linked to the Email2CRM system then you have the option to include lists from the other accounts in the subscription management view presented to a list member.

Note: if you only have one VR account you can skip this step as it doesn't apply.

For example: Your company has elected to maintain separate VR accounts for each business unit at your firm. However, you want to allow list members on Marketing Lists that are linked with a VR account to also be able to opt-in to Marketing Lists that are linked to the other VR accounts. By selecting the *Show Unified View* they will see in the subscription management page not only the lists that are linked to their primary account but to lists that are associated with all the other VR accounts.



[Account Management](#) [Sync All](#) [Sign Out](#)

Copy the link below into the footer of your Vertical Response emails.

```
<a href='nr_http://list.email2mscrm.com/SubscriptionManagement.aspx?g=4708776d82e68fe3f47af5703f26e439&b={CrmKey}&u=0&m={Email_Address}&s={CrmRecordType}'>Insert your subscription management link message here.</a>
```

[Return to AccountManagement](#)

Now select the complete line of code and copy to the clipboard. After highlighting, right click and select 'Copy'. Open up Notepad and paste the contents into a text file and save it so you have it on your local hard drive and won't have to go back online to get it.

Now login to your VerticalResponse account - <https://crminnovation.vresp.com>


A screenshot of the CRM Innovation website's login page. At the top left is the CRM Innovation logo. To its right is a login form with two input fields: "Email Address:" and "Password:". Below the password field is a "Forgot Password?" link. To the right of the form is a green "Log In" button. Below the login form is a black banner with the text "Welcome to Email2CRM by CRM Innovation". The main content area has a white background. On the left, there is a heading "Grow Your Business With Email Marketing" followed by the text "Email2CRM by CRM Innovation is the only Email Marketing Solution offering". On the right, there is a light blue box with the heading "Start Your Risk Free Trial Now!" and the text "Complete the form below so we can help grow your business".

Go to the *Email tab, New, Start Now* to create a test email with the subscription management link.
 Select *Email Canvas*.

New Email


1. Set Up 2. Design 3. Preview 4. Recipients 5. Send [« Back](#) [Next »](#)


Choose one of our email creation editors


 **Email Wizard (Recommended)**
 Email made easy for everyone

Why use the Email Wizard?

- **It's easy** - no technical expertise required!
- Create **emails in minutes** with drag and drop formatting
- **Customize** templates with your company colors and logo
- Get **tips** and **best practices** to guide you along the way

 **Email Canvas**
 Our WYSIWYG editor: build from scratch or use a template

 **Freeform HTML**
 Got HTML? Just copy & paste your pre-built code.

 **Text Only**
 Create a basic email without pictures or logos.

Enter a name and subject line for your test email.

1. Set Up 2. Design 3. Preview 4. Recipients 5. Send

Get Started
 Begin by typing a **Name** for your new email.

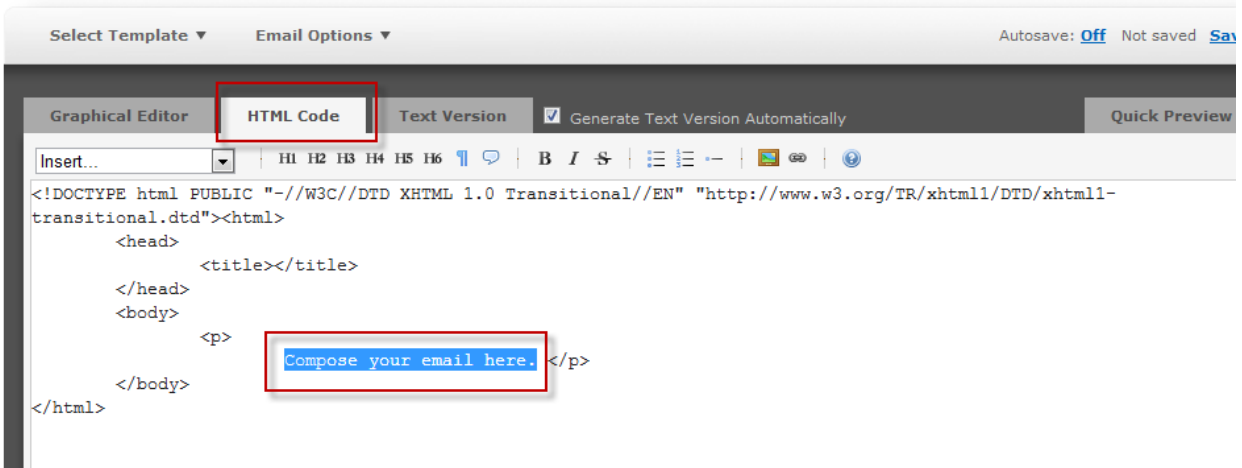
Email Name: [Tip](#)
For your reference only, not visible to your recipients.

Email Settings
 Type your email's **From Label** and **Subject Line** as they will appear in your recipient's inbox.

From Label:

Subject Line:
28 Characters (OK) - We recommend concise subject lines of less than 40 - 50 characters.

After clicking *Next*, then go to the *HTML Code* tab. Select the starter text “Compose your email here” placed by the VR system and paste into its place the subscription link you had stored in the NotePad file.



Select the placeholder message from the link and type the text that you want to appear in the message.

```
<head>
  <title></title>
</head>
<body>
  <p>
    <a href='nr_http://list.email2mscrm.com/SubscriptionManagement.aspx?
g=d1692b9df5ab1501c88a158a8995a942&b=946003f97ccc52d5d3b54ac0ec31bbfc&u=2&m={Email_Address}'>Insert your
subscription management link message here.</a> </p>
  </body>
</html>
```

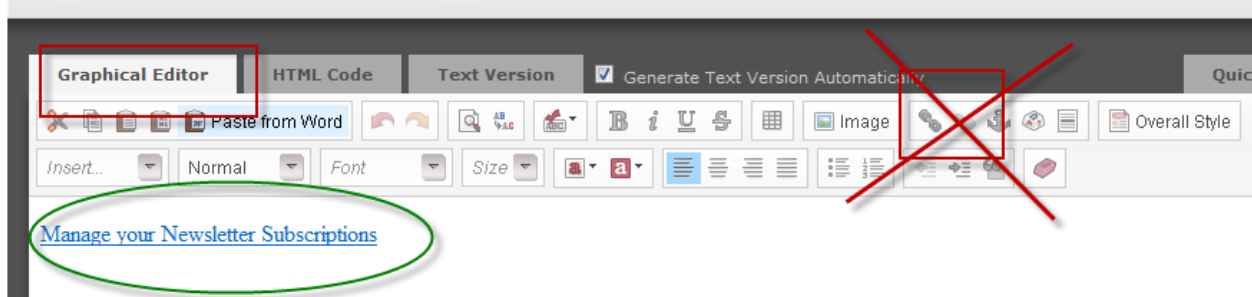
In the sample we are entering ‘Manage your Newsletter Subscription’. You also might considering using ‘To update your subscription visit our email preference center’ or another message that is relevant/meaningful to your audience.

```
<p>
  <a href='nr_http://list.email2mscrm.com/SubscriptionManagement.aspx?
g=d1692b9df5ab1501c88a158a8995a942&b=946003f97ccc52d5d3b54ac0ec31bbfc&u=2&m={Email_Address}'>Manage your
Newsletter Subscriptions</a> </p>
</body>
```

Flip back to the *Graphical Editor* view to see the results.

In this test example we are putting this link in as the only item in the email body. We recommend that you add this link to the footer of every email template you use so that it is automatically included in every outgoing email.

NOTE: Do not use the hyperlink function to create or modify this link, it won't work properly.



Now let's go through the steps of sending out a test email to confirm that the link works as it should.

On the Send Test email page, select *Mailing Lists*. If you don't change it from Simple Lists the email will be sent out but the recipient's email address won't be inserted into the link – the test won't work.

* **Send a Test:** Send a pre-launch test email to yourself or a coworker using one of the list options below.

Which type of list would you like to use?

Simple Lists ← Send to a list of just email addresses (no merge fields).

Mailing Lists ← Send to an existing mailing list. Test with standard and custom merge fields.

3. Not Done

Select your test list and then *Send Test Email*

* **Send a Test:** Send a pre-launch test email to yourself or a coworker using one of the list options below.

Which type of list would you like to use?

- Simple Lists ← Send to a list of just email addresses (no merge fields).
- Mailing Lists ← Send to an existing mailing list. Test with standard and custom merge fields.

Name	Size	Date Created
<input checked="" type="radio"/> My Web Signup Form	2	Mar 29, 2010 5:39PM
<input type="radio"/> Some New List	1	Jul 11, 2010 7:14PM
<input type="radio"/> Test iBiz	1	Jun 12, 2010 3:06PM

3. Not Done

In a few minutes you will see the email in your inbox or the inbox of the recipients on your email test list. If you were to mouse over the link before you click on it, you will see the URL that they will be sent to on the Email2CRM hosted application server. You don't need to put any code on your website.

Test Message - HTML Format:Subscription Management Test

Internet Business Initiatives, LLC <Internet_Business_Initiatives_LL@mail.vresp.cc>
 Sent: Wed 8/4/2010 12:01 PM
 To: jerry@jerryweinstock.com

[Manage your Newsletter Subscriptions](#)

<http://list.email2mscrm.com/subscriptionmanagement.aspx?g=d1692b9df5ab1501c88a158a8995a942&b=946003f97ccc52d5d3b54ac0ec31bbfc&u=2&m=jerry@jerryweinstock.com>
 Click to follow link

[Click to view this email in a browser](#)

If you no longer wish to receive these emails, please reply to this message with "Unsubscribe" in the subject line or simply click on the following link: [Unsubscribe](#)

Internet Business Initiatives, LLC
 8527 Bluejacket Street
 Lenexa, Kansas 66214



Subscription Management Page

In our example the list member will see five lists to choose from. The list member can opt-in to a list by selecting 'Yes' button next to the appropriate list and selecting update. The list member can also elect to opt-out of a list by selecting 'No' button next to the appropriate list and selecting update.

I will change my preference for the 'sub mgmt. 1 test list' list and opt-in by clicking 'Yes', then click 'Update'.

Available Publications

To subscribe to a published list, select 'Yes' radio button. To unsubscribe from a published list, select 'No' radio button.

Subscribe	List Name	Description
<input checked="" type="radio"/> Yes <input type="radio"/> No	sub mgmt 1 test list	this is where the description goes that displays in sub mgmt.
<input checked="" type="radio"/> Yes <input type="radio"/> No	Test List 1 Display Name	This is a description of the List
<input checked="" type="radio"/> Yes <input type="radio"/> No	display name 8	list description
<input type="radio"/> Yes <input checked="" type="radio"/> No	Sub Mgmt4	this is the desc for sub 4
<input type="radio"/> Yes <input checked="" type="radio"/> No	Sub Mgmt is the best list to be on	No description available.

Unsubscribe From Publications Permanently

If you wish to unsubscribe from ALL publications, check the box.

Unsubscribe from all mailings permanently.

Update Subscription Preferences

←

To unsubscribe from all mailings, you can check the 'Unsubscribe from all mailings permanently' checkbox and click 'Update'.

After I select 'Update', I am presented with the confirmation that the update has been saved.



Thank You

Your preferences have been saved.

Please allow up to 24 hours for these changes to be reflected in the messaging you receive.

If the list member elects to opt-out of any of the lists, they will be presented with a list of reasons they could select as to why they opted out.



Thank You

Your preferences have been saved.

Please allow up to 24 hours for these changes to be reflected in the messaging you receive.

Opt Out Questionnaire

Please select reason(s) for opting out of mailing list.

- Too many emails
- I am retiring
- I am changing positions
- I don't have time to read emails
- Other

Submit



After you select submit you will be taken to the following page.



Thank You

Your preferences have been saved.

Please allow up to 24 hours for these changes to be reflected in the messaging you receive.

Opt Out Questionnaire

Thank you for taking our survey. The information you provide will be used to improve our future messaging.

The list member's record in CRM has been updated immediately. In this case they have been removed from the *Some New List CRM Marketing List* and will be removed from the corresponding list in VR the

next time the list is synced. This completes the process of the Subscription Management feature. Now all you need to do is to add the link you created to the footer of all the relevant email templates your company uses and then go into CRM and update the settings in your Marketing Lists.