



## Understanding the Opt-In Feature

“Opt-in” refers to sending marketing messages only to people who explicitly request them. In EasyContact you have the option of ensuring you have this permission by sending a message to recipients of your email asking them to confirm that they wish to continue receiving emails from you. It’s good email etiquette to give recipients the choice to “opt-in” or “opt-out” of receiving further emails. When you’re making a list of new contacts, it’s recommended that you use the Opt-In feature.

### The Opt-In check box:

- Check this box to send opt-in messages to recipients.
  - ➔ Where the checkbox above appears (in the “Choose Contacts” or “Import Email Addresses” screens in EasyContact, for example) you may check it to send an opt-in message to recipients.
  - ➔ It is recommended that you check this box, especially if these email addresses haven’t been used or verified before.
  - ➔ By doing so, an “Opt-In” message will automatically be sent to all recipients. The message will ask them to confirm that they wish to continue receiving emails from you. The recipients must then click on a link in the Opt-In message. When they do so, their status will be noted as “Verified” in EasyContact and they will now receive your emails.
- If you decide not to send an opt-in message, leave the box that is to the left of “Check this box to send opt-in messages to subscribers” un-checked.

## To check the Opt-In status of contacts:

- ➔ You can see the Opt-In Status for contacts by clicking the “Manage Contacts” tab near the top of the EasyContact application screen, then choosing **Find/Edit Contacts** from the list of choices on the left side of the screen.
- ➔ In the “Search Results” table, the “Status” column shows each contact’s Opt-In Status. Here’s what each status means:
  - ➔ **Confirmed by User:** The Status will show “Confirmed by user” if the opt-in process is not used. EasyContact emails will be sent to contacts with this status. **Note:** You cannot go back and send an Opt-in message to these recipients unless you delete and re-add them to your contact list.
  - ➔ **Pending:** If the opt-in process is used, the Status will be “Pending”. EasyContact emails will NOT be sent to contacts with this status.
  - ➔ **Active:** The status changes from “Pending” to “Active” when the contact clicks on the confirmation link in the opt-in email. EasyContact emails will be sent to contacts with an “Active” status.
  - ➔ **Blocked:** If contacts click on the “Opt-Out” link in the footer of the EasyContact emails, their status is changed to “Blocked.” EasyContact emails will not be sent to contacts with a “Blocked” status.
- ➔ You may need to re-send Opt-In emails to contacts who remain “Pending” for a long period of time. To re-send an opt-in email:
  - ➔ From the “Manage Contacts” tab, choose the **Edit Contacts** button on the far left side of the screen.
  - ➔ Search for contacts by name, email or other information using the fields in the “Search Contacts” box. Click the **Search** button.
  - ➔ Click on the email address in the “Search Results” list that you would like to re-send an Opt-In email to.
  - ➔ Click the **Send Opt-In Email** button on the lower-left side of the screen. Red text will indicate how many attempts to send Opt-In emails remain.