



# CLUB CADDIE

a *Jonas* Software Company

Email Marketing Automation Training

Site Visitor Signup Box

# Email Marketing Automation Training

## Courses

1. Advanced Automation
2. Content Blocks + Dynamic Content
3. Edit Footers
4. Automated Messages
5. Survey Creator
- 6. Site Visitor Signup Box**
7. Template Editor

# Site Visitor Signup Box

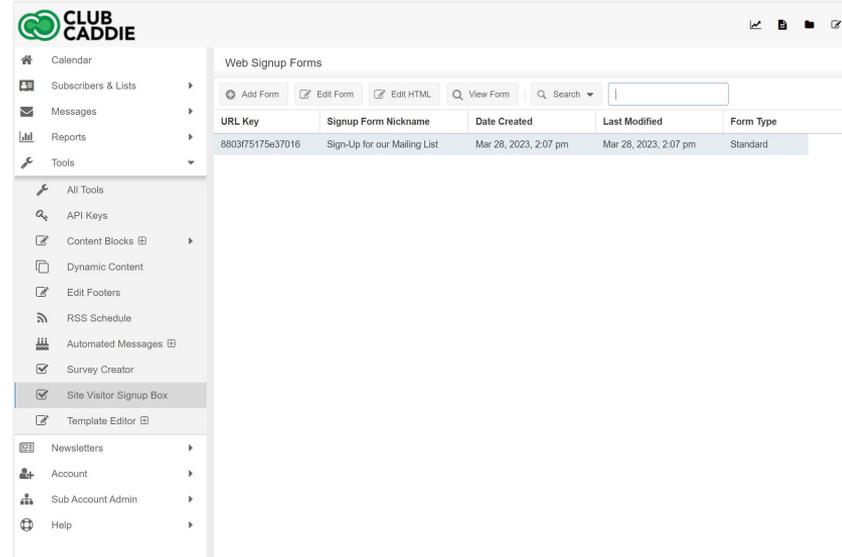


# Add a Signup Form to Your Website

The **Site Visitor Signup Box** gives your website visitors a simple method to subscribe to your email publications and thus be added to the appropriate subscriber lists in your account. This tool allows you to create multiple signup forms within the same account, which means that you can use these forms on your website, or various landing page campaigns, as needed.

Before getting started, you will need to decide the following:

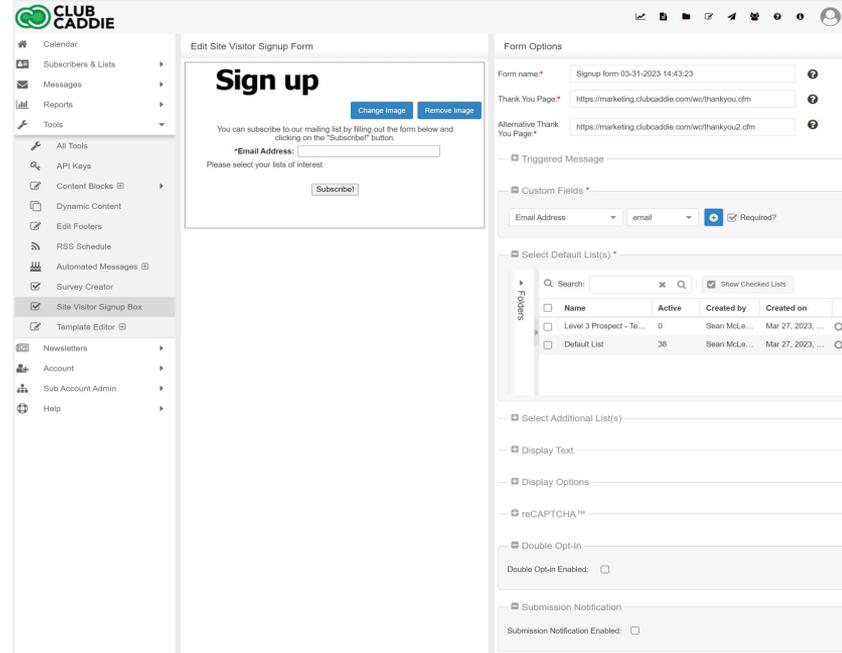
1. The name of the default list that you want all new subscribers to be added to. Create this list in advance of building your sign up form.
2. What additional data fields (if any) you'd like to capture in addition to email address? Create any fields you may need in advance of building your sign up form.
3. Are any of those additional fields required, or will they be optional?



URL Key	Signup Form Nickname	Date Created	Last Modified	Form Type
8803f75175e37016	Sign-Up for our Mailing List	Mar 28, 2023, 2:07 pm	Mar 28, 2023, 2:07 pm	Standard

# Creating a Website Signup Form

1. Click **Tools**
2. Click **Site Visitor Signup Box**
3. Click **Add Form** to add a new signup form
4. Enter a **Form Name**, used for internal reference.
5. Enter a **Thank You Page URL** if you would like to specify a the page you want subscribers to be forwarded to once they sign up for the list.
  - Otherwise, use the generic thank you page provided.
6. **Triggered Message:** Select a message to be sent to the subscribers after they sign up for the list.
  - To create a Triggered Message, follow the steps in the [Triggered Emails](#) wiki article.
7. Add **Custom Fields** that will be editable fields on the sign up form.
8. Select a Default List that all subscribers using this form will opt into.
9. If you want the subscribers to have the option to sign up for more lists, select some **additional lists**.
  - If a list does not already exist, [Create a New List](#) and then come back to this screen.



**CLUB CADDIE**

Edit Site Visitor Signup Form

## Sign up

[Change Image](#) [Remove Image](#)

You can subscribe to our mailing list by filling out the form below and clicking on the "Subscribe" button.

\*Email Address:

Please select your lists of interest

**Form Options**

Form name\*

Thank You Page\*

Alternative Thank You Page\*

Triggered Message

Custom Fields \*

Email Address    Required?

Select Default List(s) \*

Search:     Show Checked Lists

<input type="checkbox"/>	Name	Active	Created by	Created on
<input type="checkbox"/>	Level 3 Prospect - Te...	0	Sean MCL...	Mar 27, 2023, ...
<input type="checkbox"/>	Default List	38	Sean MCL...	Mar 27, 2023, ...

Select Additional List(s)

Display Text

Display Options

reCAPTCHA™

Double Opt-in

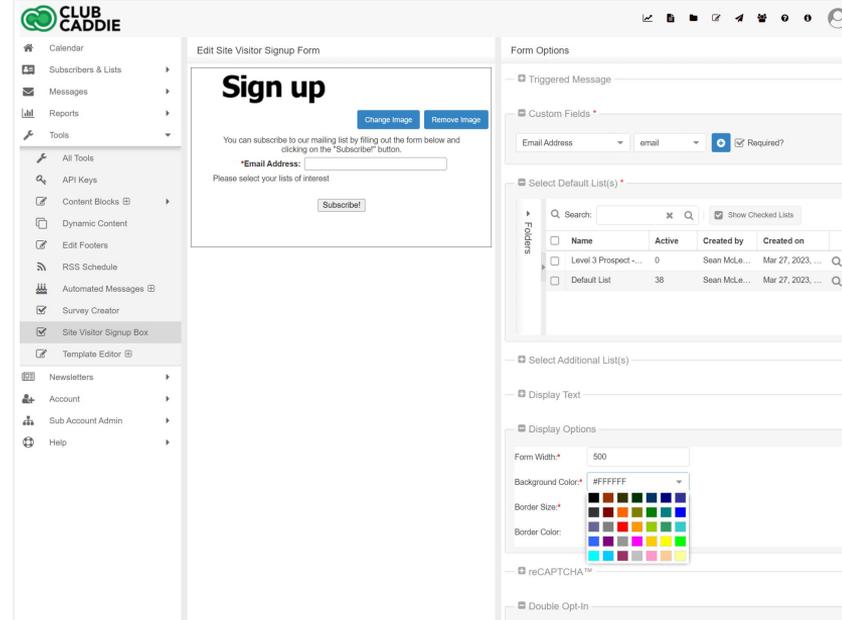
Double Opt-in Enabled:

Submission Notification

Submission Notification Enabled:

# Creating a Website Signup Form

1. Edit the **Display Options**
  - Edit the Description Text
  - Add a List Description
  - Update the Subscribe Button Text
  - Change the Form Width
  - Change the Background Color
  - Edit the Border Size
  - Customize the Border Color
2. If you would like to enable a **captcha**, to verify a human is submitting the form, you can implement this using our integrated Google **reCAPTCHA™**, check the **reCAPTCHA™ Enabled** checkbox and type in the domain(s) where the form will be hosted.
  - If you plan on using the form on a website inside an iframe, please include both the default domain where the form is hosted as well as your website's domain (e.g. "ci.criticalimpact.com,website.com")
  - More information on Google **reCAPTCHA™** can be found [here](#).
3. If you would like to enable the double-opt-in process, please check the **Double Opt-in Enabled** checkbox. For more details on this topic, please read the [Enable and Customize Double Opt-in Process](#) wiki article.



The screenshot displays the 'Edit Site Visitor Signup Form' interface in the CLUB CADDIE system. The main preview area shows a 'Sign up' form with a 'Subscribe!' button. The 'Form Options' panel on the right includes:

- Triggered Message**
- Custom Fields**: Email Address (dropdown), email (dropdown), and Required? (checkbox)
- Select Default List(s)**: A table showing selected lists.
 

Name	Active	Created by	Created on
Level 3 Prospect ...	0	Sean McLe...	Mar 27, 2023, ...
Default List	38	Sean McLe...	Mar 27, 2023, ...
- Display Options**: Form Width (500), Background Color (#FFFFFF), Border Size (color palette), and Border Color (color palette).
- reCAPTCHA™** and **Double Opt-In** checkboxes.

# Creating a Website Signup Form

If you would like to be informed of submission results, enable the **Submission Notification**. If this is enabled, you'll receive a notification email every time this signup form is submitted. To enable this, you will need to follow the steps below:

- Expand the **Submission Notification** section and check the **Submission Notification Enabled** checkbox.
- Enter email addresses that receive notification emails in the **Recipient Email Addresses** text field. Multiple email addresses can be entered by separating by comma (ex: sales@example.com, [admin@example.com](mailto:admin@example.com)).
- Click the Edit Notification Template button to open the message editor
- Edit the subject of the notification email in the **Subject** text field
- Select the **From address** of the notification email from the From dropdown list
- Edit the body message of the notification email in the text area. The %%formvalues%% merge variable will be replaced with submission results in the notification email.

**Display Options**

Form Width:\*

Background Color:\*

Border Size:\*

Border Color:

**reCAPTCHA™**

**Double Opt-In**

Double Opt-in Enabled:

**Submission Notification**

Submission Notification Enabled:

Recipient Email Addresses:

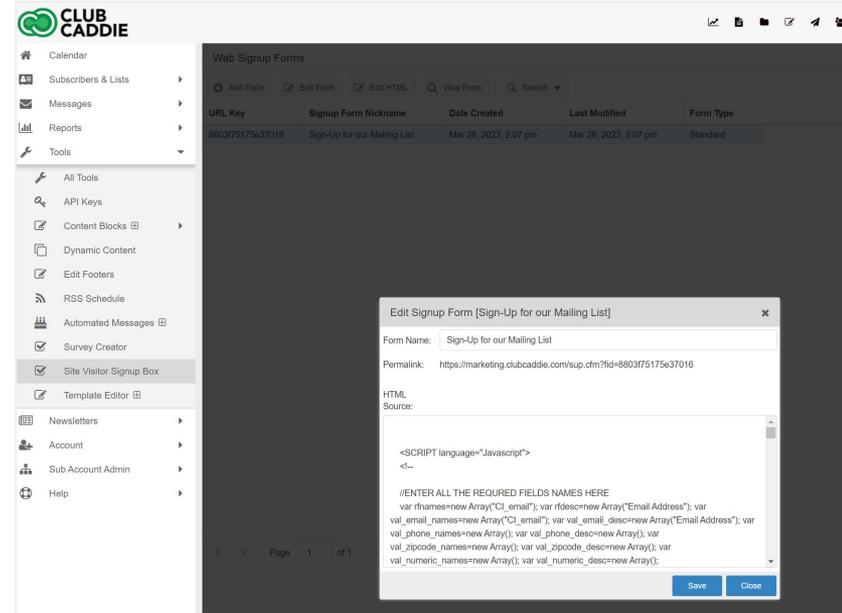
[?](#)

[Create Notification Template](#)

# Customize the HTML of a Created Form

1. Click **Tools**
2. Click **Site Visitor Signup Box**
3. Highlight the created form by clicking it once
4. Click **Edit HTML**
5. Customize the HTML and save your changes

You can modify the HTML code as much as you'd like, just be careful not to change the "form" variable names or anything related to the actual form field names or input. This means that you can totally customize the look of the signup form via HTML, but the form and input names must stay the same.



The screenshot shows the CLUB CADDIE dashboard. On the left is a navigation menu with 'Tools' selected. The main area displays a table of 'Web Signup Forms'. The first form, 'Sign-Up for our Mailing List', is selected. An 'Edit HTML' modal window is open, showing the form's details and a text area for editing the HTML code.

URL Key	Signup Form Nickname	Date Created	Last Modified	Form Type
8803f75175e37016	Sign-Up for our Mailing List	Mar 28, 2023, 2:07 pm	Mar 28, 2023, 2:07 pm	Standard

**Edit Signup Form [Sign-Up for our Mailing List]**

Form Name: Sign-Up for our Mailing List

Permalink: <https://marketing.clubcaddie.com/signup.cfm?id=8803f75175e37016>

HTML Source:

```

<SCRIPT language="JavaScript">
<!--

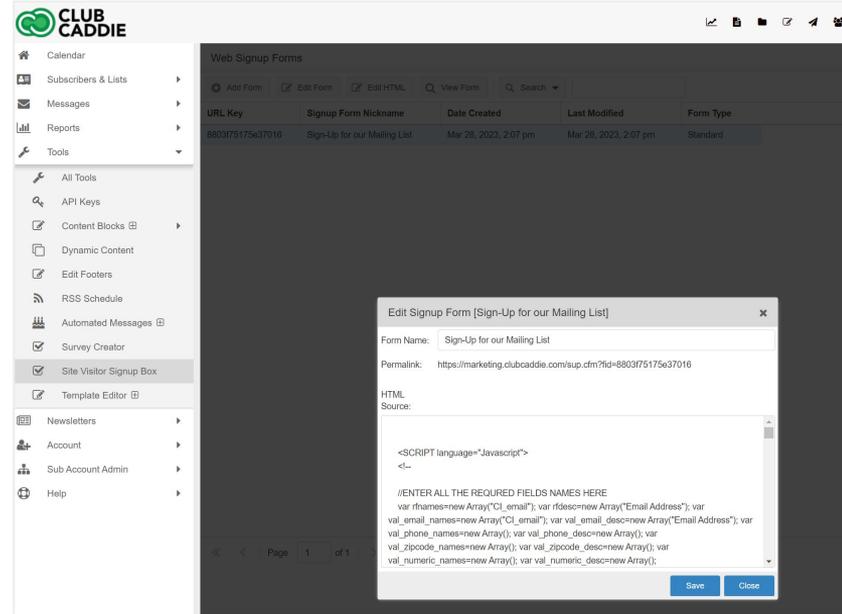
/ENTER ALL THE REQUIRED FIELDS NAMES HERE
var rfnames=new Array("CI_email"); var rfdesc=new Array("Email Address");
var val_email_names=new Array("CI_email"); var val_email_desc=new Array("Email Address");
var val_phone_names=new Array(); var val_phone_desc=new Array();
var val_zipcode_names=new Array(); var val_zipcode_desc=new Array();
var val_numeric_names=new Array(); var val_numeric_desc=new Array();
  
```

Buttons: Save, Close

# Insert Signup Form on Your Website or Email Campaign

When you create a signup form, you'll be led to a screen where you'll see these options for inserting the form onto your website or into your email campaign:

- A permalink to the signup form that you can use as a link in your email messages.
- HTML code to copy and paste onto another web page (note: if you use this option, it won't be automatically updated when this form is updated with this tool).
- iFrame code to copy and paste onto another web page (note: this option will automatically update the form on your website when the form is updated with this tool).
  - Use this option with Wordpress pages.
  - You'll probably want to change the height property in the iFrame code to make it appear as expected on your website.



The screenshot shows the CLUB CADDIE dashboard. On the left is a navigation menu with options like Calendar, Subscribers & Lists, Messages, Reports, Tools, All Tools, API Keys, Content Blocks, Dynamic Content, Edit Footers, RSS Schedule, Automated Messages, Survey Creator, Site Visitor Signup Box, and Template Editor. The main area displays 'Web Signup Forms' with a table:

URL Key	Signup Form Nickname	Date Created	Last Modified	Form Type
8803f75175e37016	Sign-Up for our Mailing List	Mar 28, 2023, 2:07 pm	Mar 28, 2023, 2:07 pm	Standard

An 'Edit Signup Form [Sign-Up for our Mailing List]' modal is open, showing:

- Form Name: Sign-Up for our Mailing List
- Permalink: <https://marketing.clubcaddie.com/signup.cfm?id=8803f75175e37016>
- HTML Source:
 

```

<SCRIPT language="JavaScript">
<!--

/ENTER ALL THE REQUIRED FIELDS NAMES HERE
var rfnames=new Array("CI_email"); var rfdesc=new Array("Email Address");
var val_email_names=new Array("CI_email"); var val_email_desc=new Array("Email Address");
var val_phone_names=new Array(); var val_phone_desc=new Array();
var val_zipcode_names=new Array(); var val_zipcode_desc=new Array();
var val_numeric_names=new Array(); var val_numeric_desc=new Array();
      
```

Buttons for 'Save' and 'Close' are visible at the bottom of the modal.