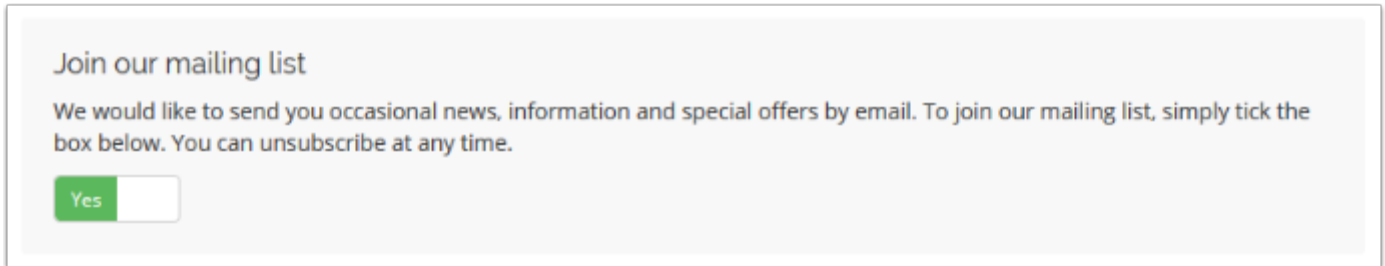


Requiring Clients to Opt In to Marketing Emails

You may want or need to offer clients the ability to opt in and out of the marketing emails that you send.

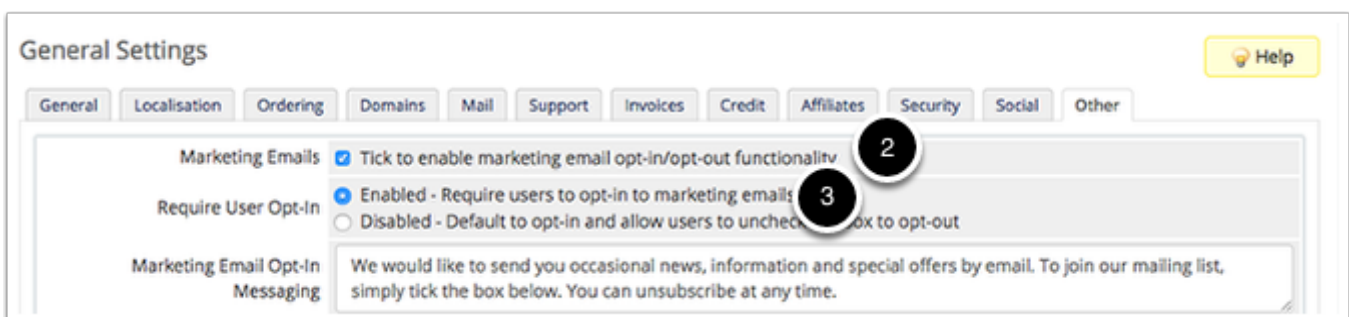
Users can opt in when they check out using the Client Area order form:

A screenshot of a user interface for joining a mailing list. It features a heading 'Join our mailing list' in a light blue font. Below it, a paragraph of text explains that the user will receive occasional news, information, and special offers by email, and that they can unsubscribe at any time. At the bottom, there is a green button labeled 'Yes' next to an unchecked checkbox.

Require Clients to Opt In

To configure this:

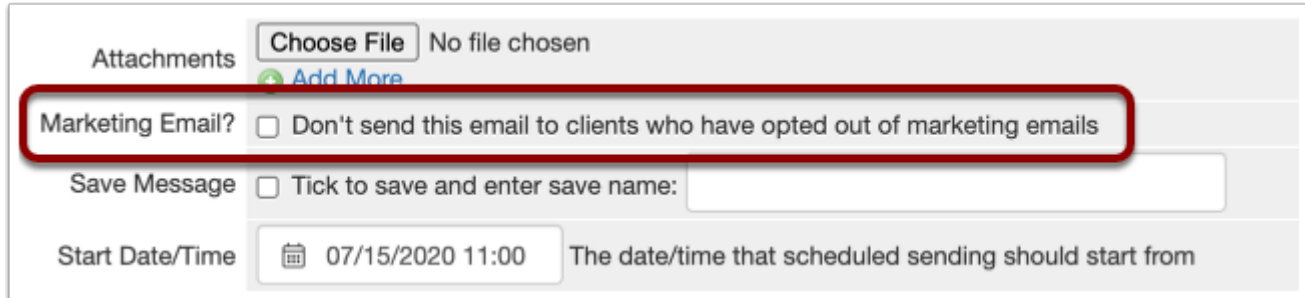
1. Go to the **Other** tab at **Configuration > System Settings > General Settings**.
2. Check or uncheck **Marketing Emails** to enable or disable the ability to configure a requirement.
3. For **Require User Opt-In**:
 - Select *Enabled* to configure the opt-in toggle to default to *No*, which requires the user to select *Yes* to opt in.
 - Select *Disabled* to configure it to default to *Yes*, which will opt the user in unless they manually select *No*.

A screenshot of the 'General Settings' configuration page in a software interface. The page has a top navigation bar with tabs for 'General', 'Localisation', 'Ordering', 'Domains', 'Mail', 'Support', 'Invoices', 'Credit', 'Affiliates', 'Security', 'Social', and 'Other'. The 'Other' tab is selected. Below the tabs, there are three main sections: 'Marketing Emails', 'Require User Opt-In', and 'Marketing Email Opt-In Messaging'. The 'Marketing Emails' section has a checkbox that is checked, with a circled '2' next to it. The 'Require User Opt-In' section has two radio buttons: 'Enabled - Require users to opt-in to marketing emails' (selected, with a circled '3' next to it) and 'Disabled - Default to opt-in and allow users to uncheck box to opt-out'. The 'Marketing Email Opt-In Messaging' section contains a text box with the same text as the form in the previous block. A 'Help' button is visible in the top right corner.

4. Click **Save Changes**.

Sending Marketing Emails

When sending a marketing email, make certain to select **Marketing Email?** at **Utilities > Email Campaigns** or, prior to WHMCS 8.0, **Clients > Mass Mail**.



The screenshot shows a form for sending emails. At the top, there is an 'Attachments' section with a 'Choose File' button and the text 'No file chosen'. Below this is a green plus icon and a blue link 'Add More'. The 'Marketing Email?' section is highlighted with a red rectangle; it contains a checkbox and the text 'Don't send this email to clients who have opted out of marketing emails'. Below this is a 'Save Message' section with a checkbox and the text 'Tick to save and enter save name:', followed by a text input field. At the bottom, there is a 'Start Date/Time' section with a calendar icon, the date and time '07/15/2020 11:00', and the text 'The date/time that scheduled sending should start from'.

Users can change their marketing email preferences at any time using their profile page in the Client Area. Admins can change it in the user's profile in the Admin Area.