



Self-Sign-Up Admin Guide



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Configuring Self-Signup

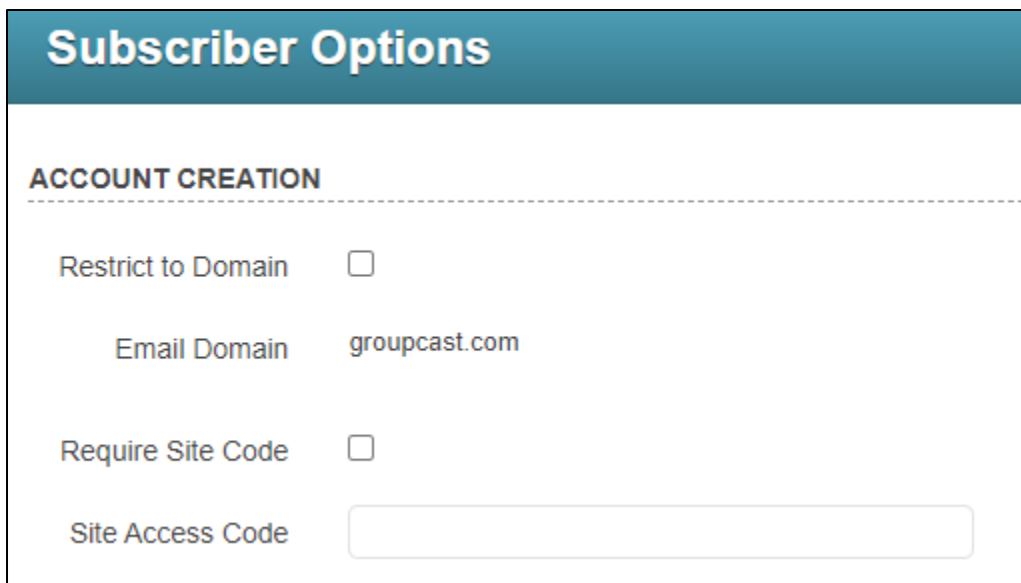
Groupcast's Self-Signup feature allows users (which we refer to as subscribers) to subscribe to your messages and control the ways in which they prefer to be contacted using a convenient online account that they create and manage.

Settings

Configuring Self-Signup Settings

If you prefer to limit who may subscribe to receive your notifications, you may optionally configure your subscriber settings to only allow subscribers who fulfill certain requirements, such as having an email address from a specific domain or requiring the entry of a special site access code.

Navigate to **Admin** → **Settings** → **Subscriber Settings**.



The screenshot shows a form titled "Subscriber Options" with a teal header. Below the header, the section "ACCOUNT CREATION" is separated by a dashed line. The form contains four settings: "Restrict to Domain" with an unchecked checkbox, "Email Domain" with the value "groupcast.com", "Require Site Code" with an unchecked checkbox, and "Site Access Code" with an empty text input field.

If you would like subscribers to sign up only with email addresses from specific domains, use the **Restrict to Domain** option. Domain restrictions can only be added or removed by GroupCast Solutions Support. Contact support@groupcast.com to add or remove restricted email domains to your account.

To restrict subscribers by requiring a Site Access Code, check the **Require Site Code** checkbox and enter a code, a word or a phrase in the **Site Access Code** field. Only subscribers who know the code may sign up for your messages.

Creating Subscriber Fields

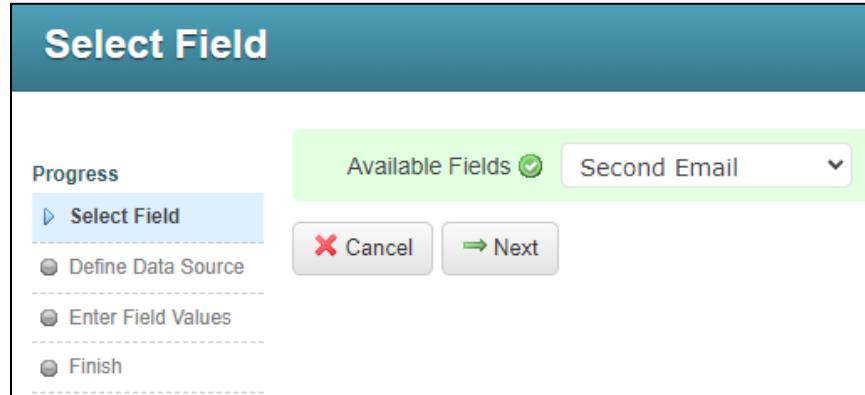
Subscriber fields let you choose what information a subscriber must enter in the form when subscribing. When you create a notification list, the fields that your subscribers choose when configuring their notification preferences will determine whether or not they are included on your list.

These fields are selected from the fields that were already defined in your account under the **Admin** tab and **Settings** sub-tab menu. Available fields are defined in the **Field Definitions** and **Group Field Definitions** menus and will be of the **List** or **Text** type.

Navigate to **Admin** → **Settings** → **Subscriber Fields**.

Click **Add Field**.

Choose an available field from the drop-down menu.



Click **Next**.

Depending on the type of field selected, there are multiple ways for the data to be populated.

For fields of the **List** type, you may choose to manually enter a list of possible values, or you can allow the list to auto-populate with the data values that you mapped in your data imports (**Admin** tab → **Imports** sub-tab).

Fields of the **Text** type may be populated with a default value by selecting **Set by Admin**. Alternatively, you may select **Set by Subscriber** which allows the subscriber to enter the data themselves.

Editing Static Subscriber Field Values

If you would like to change the field values for a field you've created, just navigate to **Admin** → **Settings** → **Subscriber Fields** and click **Edit Values** for the field you wish to edit.



Note: *Whenever you add a new organization or other value generated by imported data, and you want that data to be available to subscribers to select, make sure to edit the relevant Subscriber field and check the box to include the new data items in your subscriber's accounts. It will not be automatically enabled by default.*

Notifying Your Subscribers

Once you've configured your subscriber settings, you will need to let your potential subscribers know how to sign up.

One way to do this is through sending a letter or email. We've created a letter template on the following page, which you can use as a guide to notify potential subscribers. You will need to change this template based on how you've configured your subscription settings.

Using the Template

Change the URL so that it matches your customer URL. Remove the **CustomerID** portion and enter your Customer ID to make it your own account URL.

If you've chosen a Site Code, put it in the **Site Code** section, otherwise make sure to **delete** this line.

Subscriber Outreach Template

Dear «First_Name» «Last_Name»:

Our organization has contracted with West, provider of GroupCast to provide timely communication to staff and community on matters such as outages, general interest activities and community surveys.

In order to enhance our ability to accurately deliver that information we kindly request that you create your own contact preference profile using our organization's subscriber website for GroupCast. This allows you to control the ways in which you prefer to be contacted. It also works like a mailbox, giving you a place to review messages you may have missed.

In order to utilize this feature simply follow the steps below to create an account through this secure web site.

Steps for setting up your account:

1. Enter the following URL into your web browser:

<ENTER YOUR GROUPOCAST SUBSCRIBER URL>

2. Click the **Sign Up Now** link near the bottom of the page.
3. You will be taken to the Sign-Up page where you will need to confirm the encrypted image, your name, a valid email address and a password. You'll use your email address and the password you enter here to sign in later. Review and accept the Terms of Service. Click **Create Account** when you are done.

Note: West has a strict privacy policy and does not sell or distribute your contact information to any 3rd party.

4. Check your email. There will be an Account Activation email from support@groupcast.com with the subject **Account Activation**, which contains a link to activate your account; activation codes are valid for 24 hours. This link will take you to a confirmation page where you must enter your password in order to activate your account. (**Note: Do not reply to this email directly – you only need to follow the directions**).
5. Once you've activated your account, you're ready to select your notification preferences.
6. Simply select the type(s) of notifications you wish to receive and the groups to which you belong.
7. When you have finished making selections click **Save**.
8. Follow the instructions to add additional contact information to your account.

Thank you for signing up and we hope you enjoy GroupCast!