



Convertri Tutorial

Setting Up A 2-Step Opt-In

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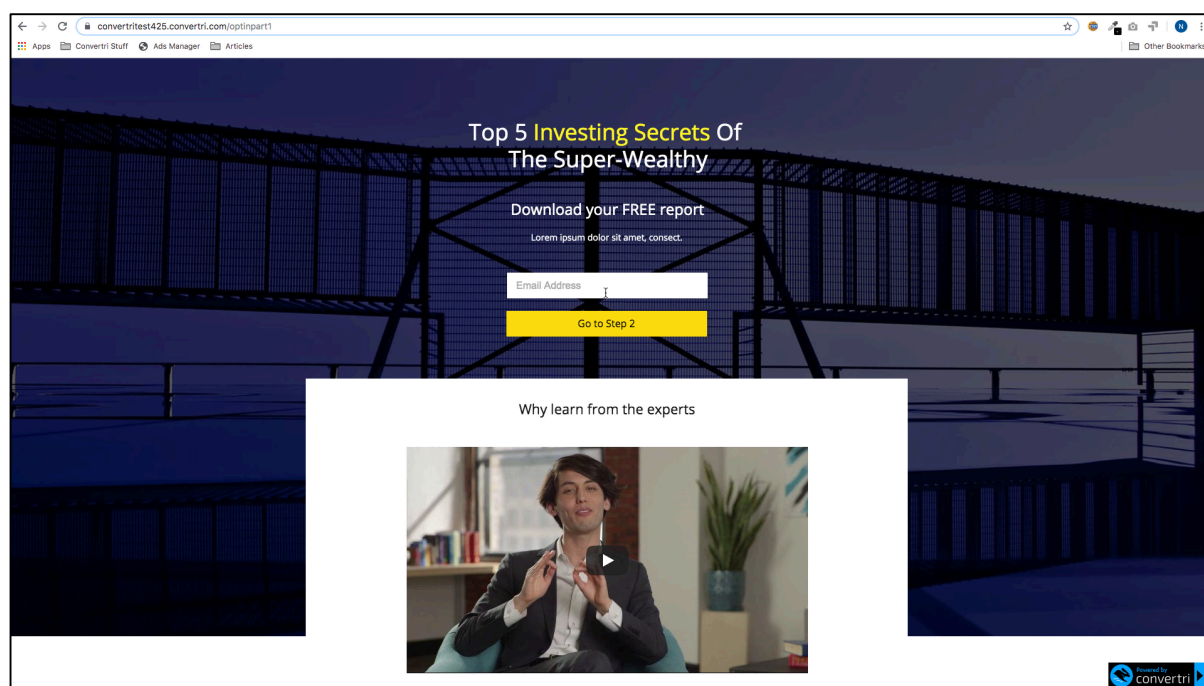
Setting Up A 2-Step Opt-In With Convertri

This tutorial walks you through how to set up a 2-step opt-in with Convertri. Your user will be able to enter their e-mail address (and any other information you want) on the first page, and it will then be auto-filled on the larger form on the second page.

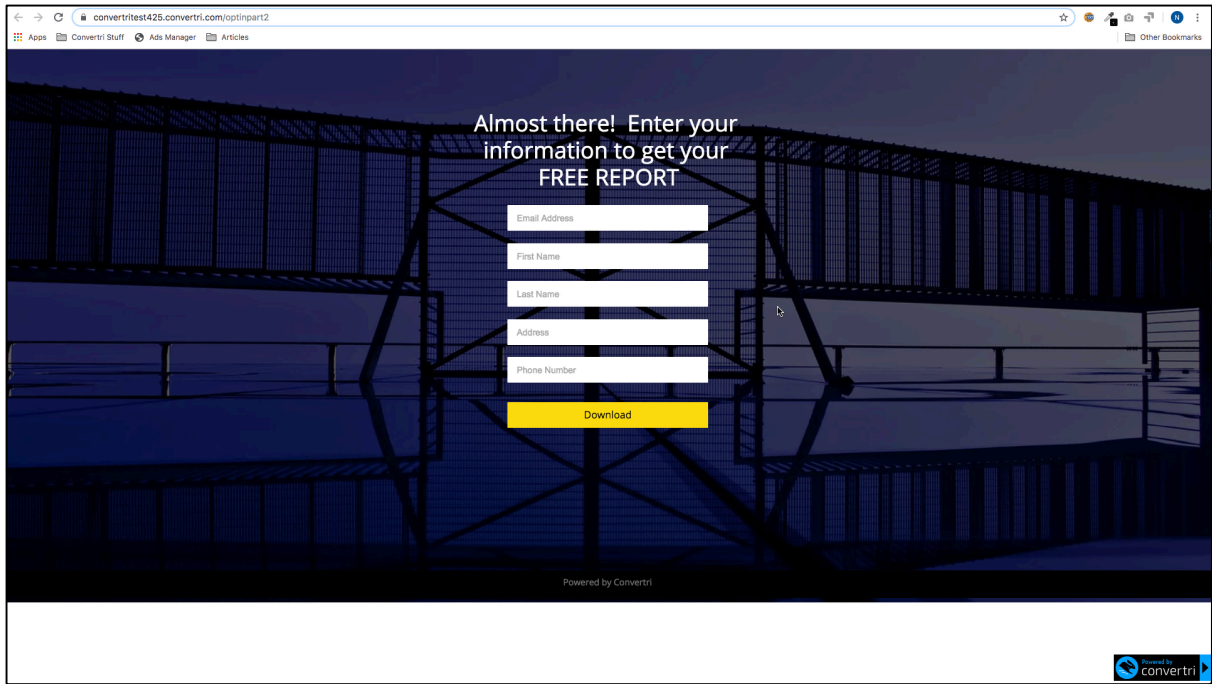
To use this tutorial you will need:

- Both your form pages created in Convertri
- The URLs of the second form page and the Thank You page (these don't have to be published, but you do need to know what URLs you'll use)
- Your list set up in your autoresponder

In this example, we're going to use this page as page 1 of the form:



And this page as page 2:

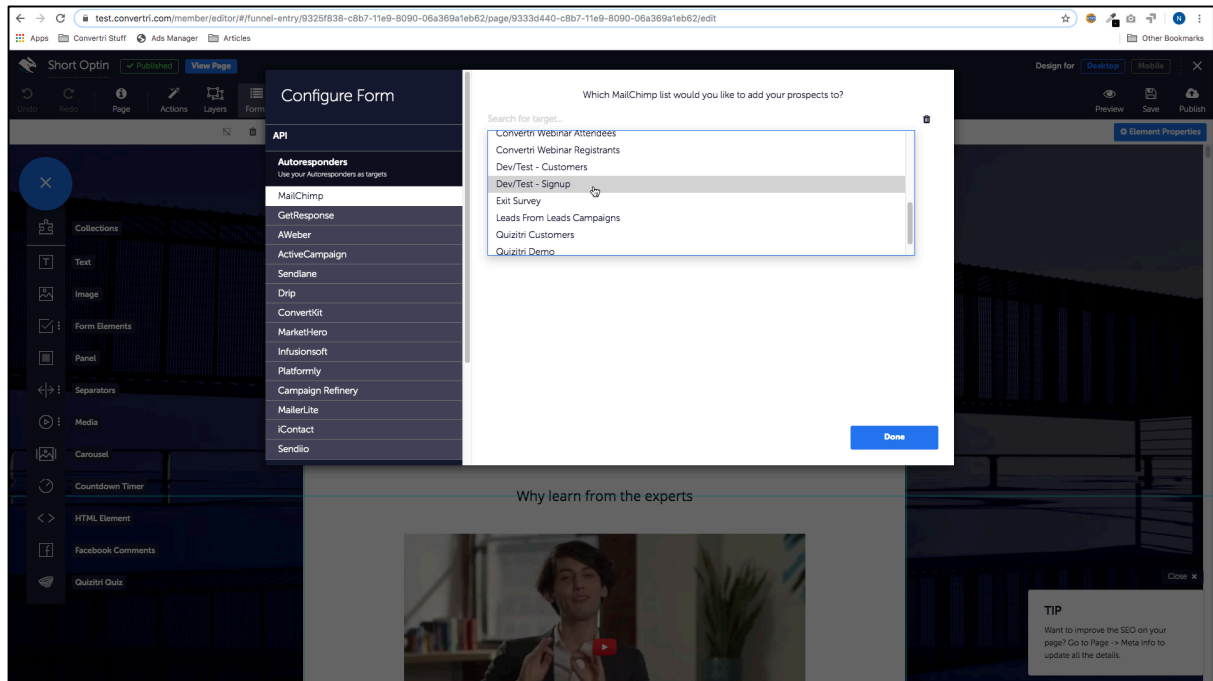


The e-mail address will be passed on from the first page and autofilled on the second page.

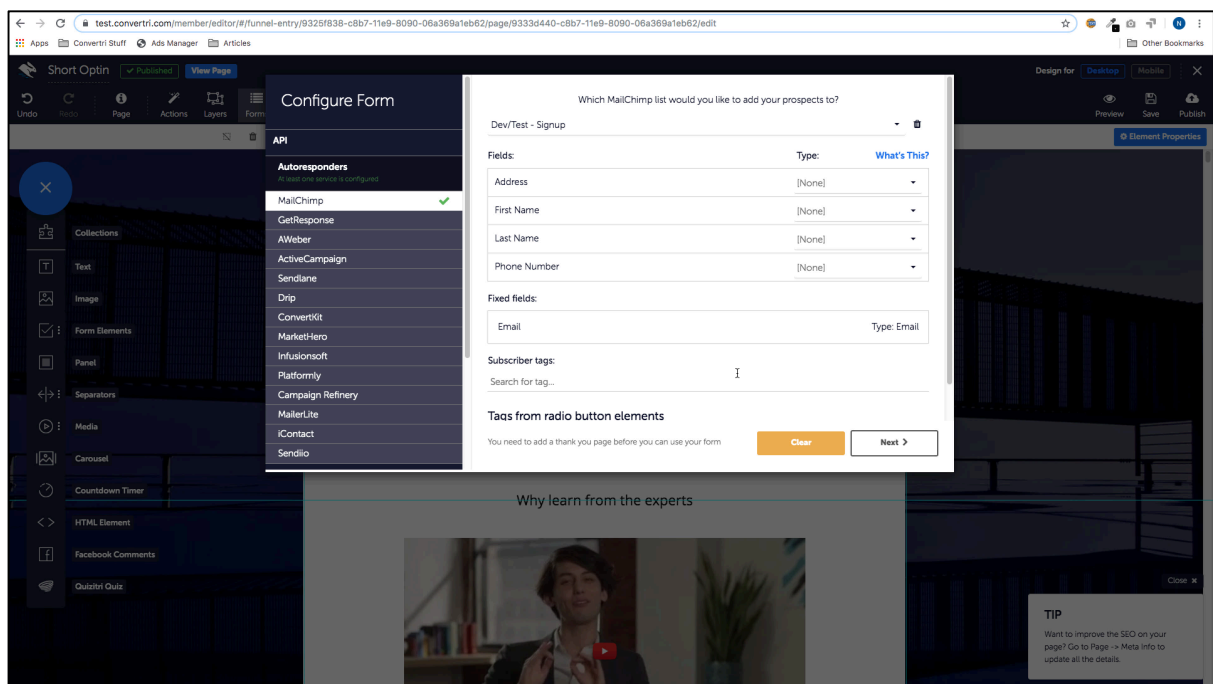
Note: 2-step opt-in requires an API form integration.

Setting Up Page 1

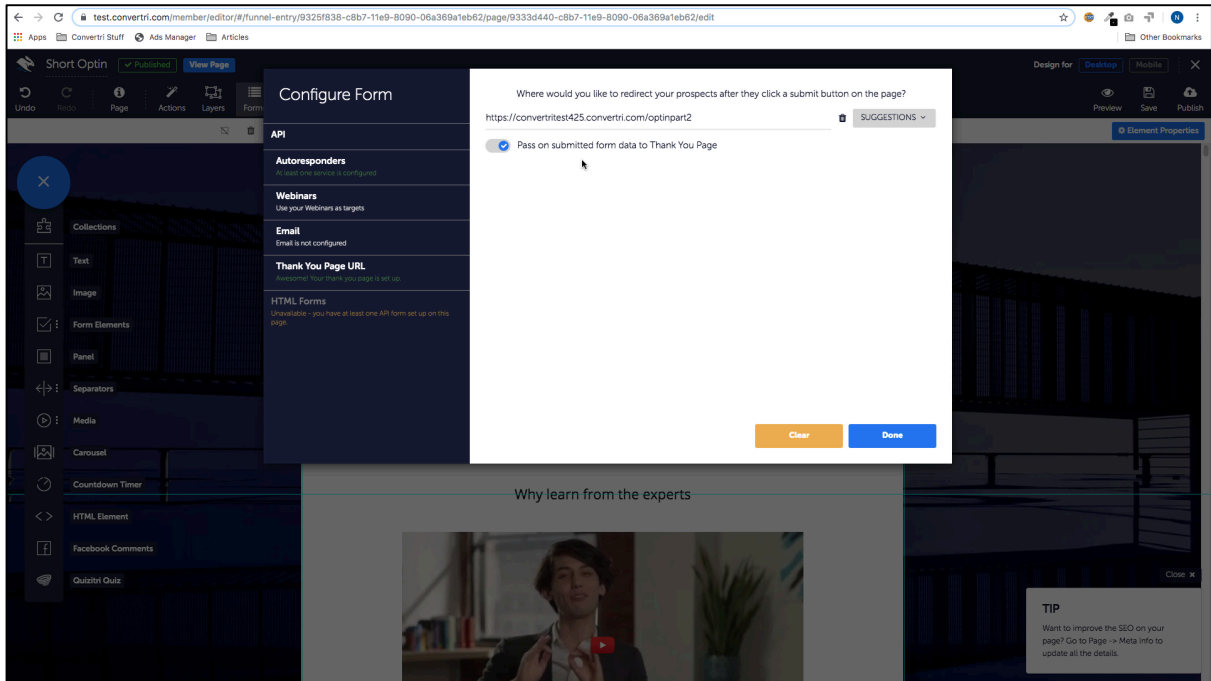
1. Connect your autoresponder form to the page as normal by going to **Forms**, selecting your autoresponder from the available APIs and then choosing the list.



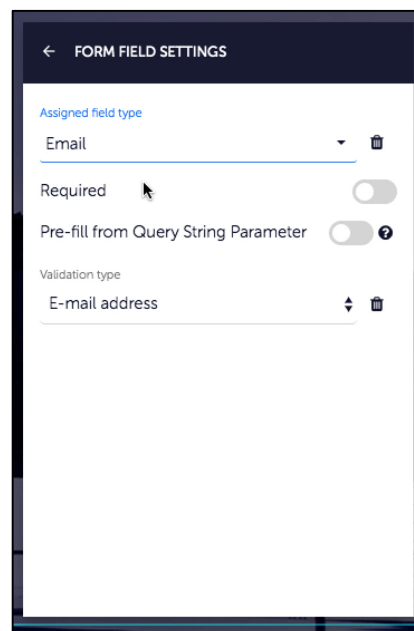
2. Assign any form fields as needed. In this example, only the E-mail field is required on this page and Mailchimp assigns that one automatically, so we don't need to assign any others. When you're done, click **Next**.



3. Set the Thank You Page URL to be the URL of the second page of your form. If you've already published this page and connected it using the arrows in the funnel planner, Convertri will suggest it automatically.
4. Switch on **Pass on submitted form data to Thank You Page**, and hit **Done**.



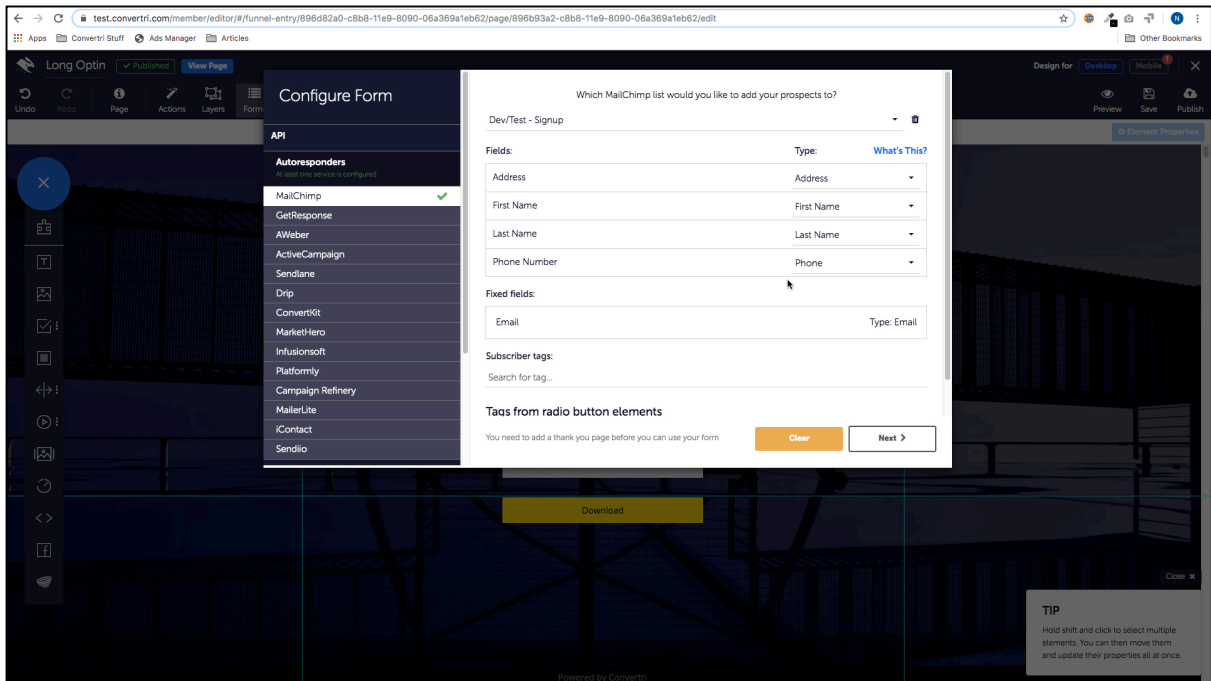
5. In the Properties Panel, assign the field types of your input boxes.



6. Save and publish your page.

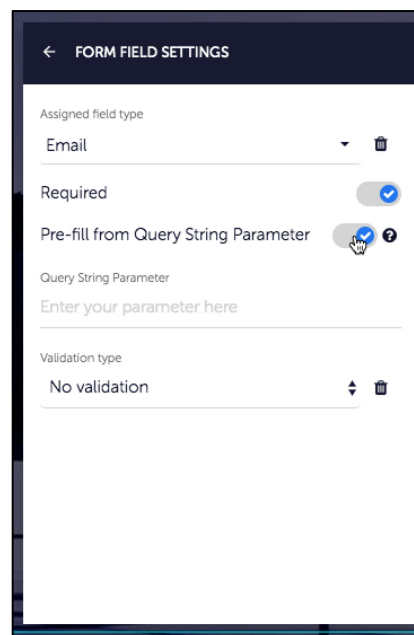
Setting Up Page 2

1. As on Page 1, connect your autoresponder form to the page, assign any form fields, and add your Thank You Page URL. Click **Done** when you're finished.



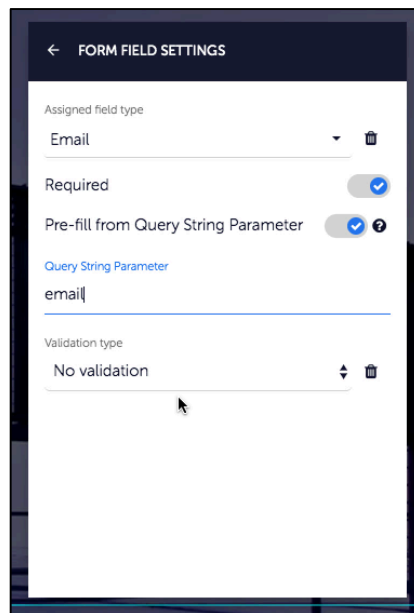
For All Input Boxes That Should Be Auto-Filled

2. In the Properties Panel, assign the field type as normal, and then select **Pre-fill from Query String Parameter**.



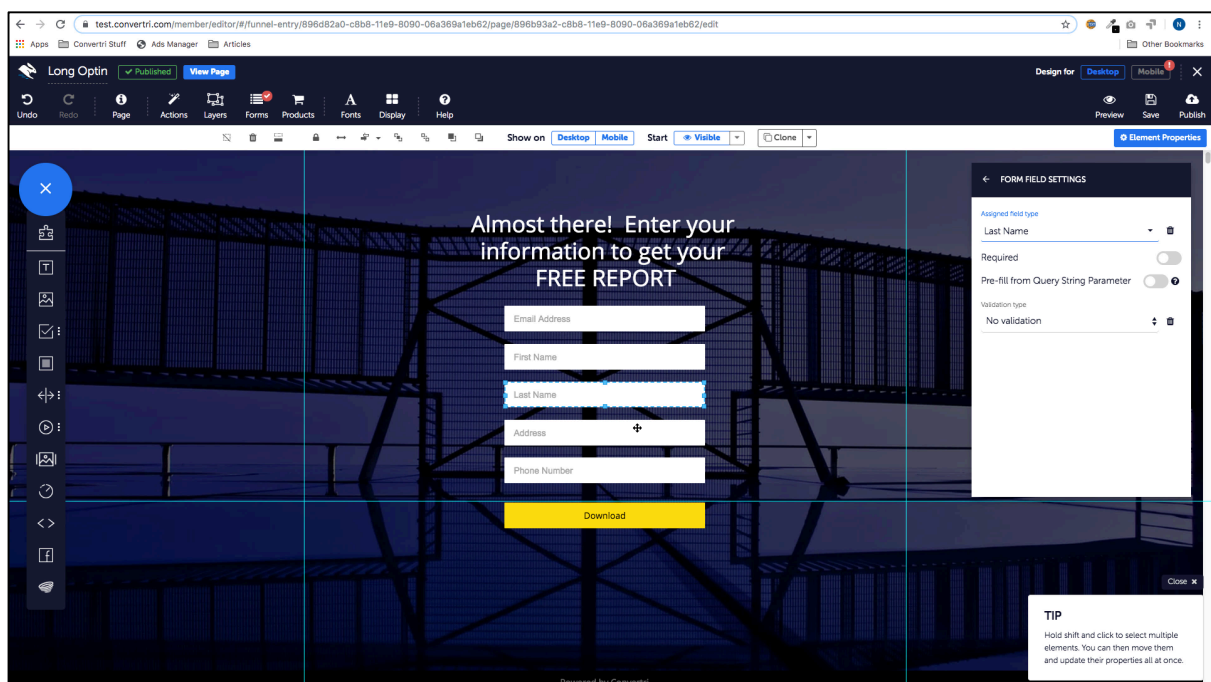
- The parameters Convertri uses are the field types of the input box passing on the data from the previous page, all lower case and without spaces. So in this example the field type of the input box passing on the data on page 1 was Email, so we enter **email** in the Query String Parameter box.

If the field type had been First Name, we would enter **firstname**, if it had been Phone we would enter **phone** and so on.



For All Input Boxes That Should Not Be Auto-Filled

- Assign their field types in the Properties Panel as usual.



Finally...

5. Save and publish your page.

Your 2-step optin form is now set up.