Client

In this article, you'll learn about:

- [Account Settings](#)
- [Mail Volume](#)

Account Settings

Account Settings allows you to define default settings and preferences. To change your setting, update the information and click *Save*.allows you to define default settings and preferences. To change your setting, update the information and click *Save*.
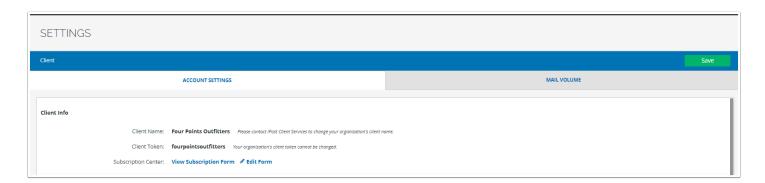
Client Info

The *Client Info* section displays the information in which iPost will use to identify your organization.

Client Name	The *Client Name* appears on default iPost provided subscription forms. This name is configured for you during set-up and may be changed by contacting your Customer Success Manager.
Client Token	The *Client Token* is a unique identifier which is used by many of iPost's automated systems. It is also required when using the iPost API. This value cannot be changed.

Subscription Center

The Subscription Center allows contacts to sign up for email marketing messages and to also opt out from email marketing messages. To use the Subscription Center as a sign up form, either place the URL on your website or use the URL in the body of your emails. When using the iPost opt out options, contacts are brought to the Subscription Center and the opt outs processes back to your iPost client.

SETTINGS

Client		Save
ACCOUNT SETTINGS		MAIL VOLUME

Client Info

Client Name: **Four Points Outfitters**   *Please contact iPost Client Services to change your organization's client name.*

Client Token: **fourpointsoutfitters**   *Your organization's client token cannot be changed.*

Subscription Center: **View Subscription Form**   ✎ **Edit Form**

View Subscription Form

Click the *View Subscription Form* link to see your native subscription form. This action will also provide the URL for the Subscription Form for your client.

Edit Form

Click the Edit Form Link to make edits to what options render on the Subscription Form and to change the look and feel of the form.

1. *Subscription Center Text* allows you to replace the default text with custom copy for the Subscription Center.
2. *Logo URL* is the URL for the logo that renders on the Subscription Center. This can be modified as needed by replacing the imaging path with the path for the new image.
3. *Display Public Lists* will display any list with the Public setting enabled in the list properties. This is disabled by default.
4. *Display Topics* will display any Topics in the client account
5. *Display Mobile Phone Options* displays the mobile phone field on the Subscription Center page.
6. *Upload Custom CSS* allows you to upload your own CSS.
7. *Download Custom CSS* allows you to download the custom CSS that had been uploaded
8. *Download Default CSS* allows you to download the default CSS in order to modify and upload it.

> ℹ️ If uploading a CSS file, it may take a couple of minutes for the changes to take affect on the subscription page. Please allow time for the CSS to update when viewing these changes.

Account Info

The *Account Info* section displays the main user's contact information.

Mailing Manager	The person responsible for creating and launching mailings.
Email Address	The address where iPost should send emails regarding mailing setup. This dropdown menu lists all active users in your iPost account. If the address of the primary contact is not in this list, please create a user account for that person.

FTP Settings

The FTP Settings section allows you to set a time frame for how long files should be retained on your iPosts FTP site. The default setting is 3 months. The minimum retention period is 1 week and the max retention period is 6 months.

Time Settings

The *Time Settings* section allows you to set a default time zone, date format, and time format.

Set Default Time Zone	The time used when entering mailing history events.
Set Date Format	Select the date format you would like to use. By default, the iPost platform will accept YYYY-MM-DD. However, you can choose another date format if needed. When importing data, you must use the selected date format for datetime fields.
Set Time Format	Select the time format for your iPost account. When importing data, you must use the selected time format for datetime fields.

Default Values for Emails

These settings are used to provide defaults for new email tickets.

From/Display Name	The name associated with your email address as displayed in the subscriber's inbox.

Reply To	The email address your mailing will be sent from as displayed in the subscriber's Inbox.
List Owner	This value populates an Internet Engineering Task Force standard email field that is intended to identify a human administrator who can deal with any difficulties experienced by the recipients of the mailing. It should contain a valid email address or be blank.
Sender Postal Address	The postal address of the brand or company sending the email. You must include your postal address in each mailing.
Document Preview Address	This allows you to set a default email address which will be used for personalizing the preview of emails.
Automation Error Notification	The email address that automation error notifications should default to.
Mailing Duration	How long your mailing will be scheduled to run by default. This field is used to set the allow deliveries/forwards date for each ticket, which can be adjusted in the ticket Advanced Settings.
Track System Fields	Enabling this feature will track clicks on the native opt out link, the View in Browser link, and the Forward to a Friend link.

Extended Services

Custom Domain Name

A custom domain name can help improve your brand awareness by placing your company name (or other words you choose) in your tracked URLs. We recommend that you update your own DNS (domain name service) to assign a "sub-domain" of your company website to iPost for this purpose. For example, if you assign the domain "enews.MyCompany.com", then URLs in your content will have this appearance:

http://enews.MyCompany.com/rd/9z1z...

iPost can optionally create a custom domain name for you that is used instead of "ipost.com" in your mailing's tracked URLs. For example, if you choose a custom domain name of "MyCompany.ip02.com," your URLs will look like this:

http://MyCompany.ip02.com/rd/9z1z...

Instead of like this:

http://rd.g001.enterprise.ipost.com/rd/9z2z...

Link Redirects

When iPost performs link tracking in your mailings, clicks on links are redirected through a tracker that resides in one of two places: at ipost.com, as discussed above for Custom Domain, or at your own website. This option changes the URLs in your content to look like:

http://www.MyCompany.com/zdr/rd/9z1z...

Mail Volume

The Mail Volume tab contains information related to your contracted email volume as well as the ability to generate a mail volume report based on a specific timeframe.

Contract Details

The Contract Details outlines the current contract terms for your account. For subclients, this information is inherited from the parent account.

Field	Description
Client Name	The name of the client that the contract is associated with. For a subclient, this will populate with the name of the parent account.

Field	Description
Contract of	The contract start and end dates
Purchased Message	The total email volume as stated in the contract
Message Balance	The total remaining email volume left in the contracted term
Exceeded Message	The total number of emails sent over the contracted email volume
Total Sent	The total number of emails that have been sent

Mail Volume Report

The Mail Volume tab also allows you to create a report of the total email volume sent based on a specific time frame. To create a mail volume report, follow these steps.

1. Click on the green Report icon next to the date range.
2. Select your date range from the available options or create a custom date range.
3. Click *Apply* to generate the report.

The mail volume report can also be run across all sub-clients for a client. To run the report for all sub-clients, follow these steps.

1. Go to the parent account for the client
2. Access *Client* in the Settings menu
3. Click on the *Mail Volume* tab
4. Click on the green *Report* icon next to the date range
5. Select your date range from the available options or create a custom date range.
6. Check the box next to *Sub Client*
7. Click *Apply* to generate the report.

The report will generate below the Contract Details box. The mail volume report can be downloaded by clicking the *Download Report* button.