## **Create a Subscription Category**

- 1. To create a subscription, hover your cursor over Admin, then click System Management.
- 2. In the structure pane, create a new folder in the Contacts folder of the appropriate org.



3. Navigate to the org, click Contacts in the navigation bar, then click Share.

Contacts		Filter Add Share 😴
First Name	Last Name ↑	Title Actions
John	Doe	M /
Jane	Doe	PA /
Page size 10 ▼	≪ < Page _ 1 of 1 > >>	Displaying 1 - 3 of 3

- 4. Share the contact record with the folder created in step 2 above.
- 5. Open the contact record, then click the Shares tab.
- 6. Click the pencil icon beside the share made in step 4.
- 7. Select a category from the Subscription Category dropdown menu.

Contacts			
General Conta	act-Methods Account	Photo Relationships SH	nares Forms Locations Properties
ltem ↓	Original Location	Shared Location	Subscription Action Category
👗 John Doe	Contacts	🗀 John Doe	General 🔻 🖉 🖨
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- 8. Click the Contact-Methods tab.
- 9. Click Add in the Subscription Category Preferences section, then add the category configured in step 7 above.

ontacts				
General Contact-Methods Ad	ccount Photo Relati	onships Shares For	ms Locations	Properties
Add a New Contact Method	for John Doe			
Select Device Type: Email   Select Method Type: Work Email  Email:	?			
Display	Primary Email	Primary Phone	Preferred	Delete
johndoe@example.com	۲		۲	•
Subscription Category Prefe	rences			
Subscription Category	Preferred N	lethods		Delete
General	0			•

10. Click the category.

lashifty icon, then select the method(s) that should receive messages from the selected subscription

Subscription Category Preferences		х
Subscription Category	Work Email - johndoe@example.com	Delete
General 📀		•
Add		

11. Create a new message. In Step 3: Message Settings, add the category selected in step 7 above.

Send Ad Hoc Message	
Step 1: Compose Message Step 2: Select Recipients Step 3:	: Message Settings Step 4: Confirm & Send
Provider Set: Custom  Phone System: System 7 Phone System: System 7 Email System: System 7 SMS Gateway: System 7 Delay Between Attempts: 120 Delay Between Attempts: 120 Maximum Attempts: 1 Remail/SMS Language: English - United States Remail Prefix: ACFC Phone Language/Gender: US Male Phone Language/Gender: US Male Phone Language/Gender: US Male Phone Language/Sender: US	Available Categories         Image: General         Image: Miscellaneous         Image: Test         Image: Weather         Image: Browse Filter - Results         Image: Filter - Results
	🖨 General

Subscription categories require a system configuration setting which determines who will receive subscription messages.

Configuration Setting	Subscription Message Recipients
Local	Only contacts subscribed to "General" in the Contacts folder.
Ancestors	Contacts subscribed to "General" in the Contacts folder and any contacts that have that subscription category in any contact folder "above" the contacts folder in Chuck Test.

Descendants (default setting)	Contacts subscribed to "General" in the Contacts folder and any contacts that have that subscription category in any contact folder below Chuck Test.
Both	Contacts subscribed to "General" in the Contacts folder and any contacts that have that subscription category in any contact folder above or below Chuck Test.