Act! Marketing Automation

5-Step Guide to Getting Started

Congratulations!

You've signed up for an Act! Marketing Automation trial—now what?

- To access your trial, be sure to close Act!, re-open the program, and navigate back to the Act! Marketing Automation tab.

You're ready to get started!

Contents

Step 1

Configure your account settings

Before you send your first campaign you must configure your account settings. This is where you'll specify key account details that are required to send email campaigns. Follow the steps below to get set up.

- Update your company profile information within the Account Configuration tool **(Note: During your trial period, any test campaign sent will come from the actsend.com domain.)**

- Configure your unsubscribe designer—this is the mandatory unsubscribe page your customers will see.

- Invite your team members to try Act! Marketing Automation with you. Navigate to *Tools → Manage Users* from within your Act! database and add Emarketing Administration permissions for each team member.
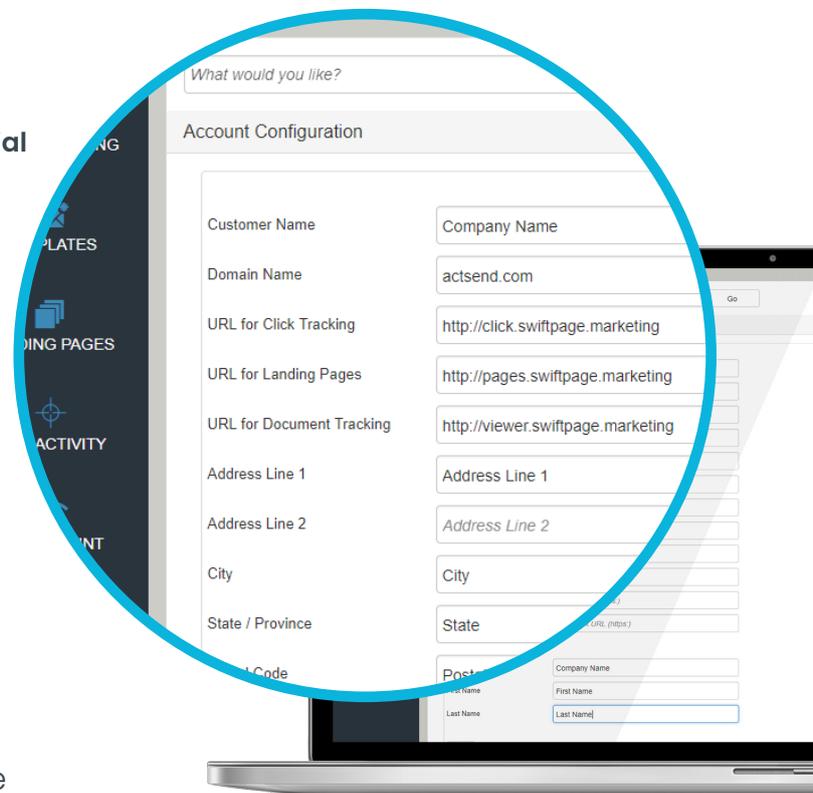
For detailed instructions on configuring your account settings, visit:

www.act.com/amaaccountconfig

Step 2

Create your first email template

Now that you've configured your account settings, it's time to get creative and set up your first email template! You can import an existing template or start from scratch and create a new masterpiece.

- To get started, click Templates in the left-hand navigation bar, and then in the top-right section of the screen click *Actions* → *New Template*.

For a detailed look at how to create your template, watch this short video and visit www.act.com/amatemplates:
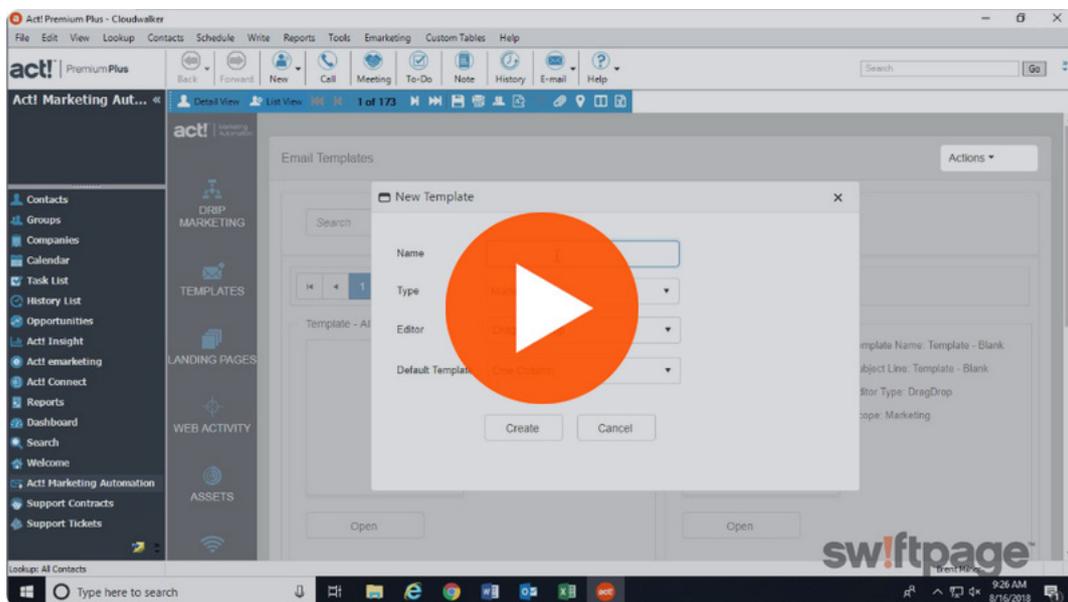
To view all training videos, visit:

www.act.com/amavideos

Step 3

Set up your campaign

You're ready to set up your first campaign!

- Create a group in Act! with yourself as the sole contact so you can test sending to yourself and see your campaign results in Act!.
  (Note: During your trial you will only be able to send to yourself, so be sure to complete this step!)

- To create your campaign, go to the Drip Marketing section in Act! Marketing Automation. From there, go to *Actions* → *New Campaign* in the top-right corner of the screen.

- Populate your campaign information--this is where you'll determine your campaign name, number of emails in the campaign, and the contact group you'd like to send to.

For a detailed look at how to create your template, watch this short video and visit www.act.com/amacampaigns:
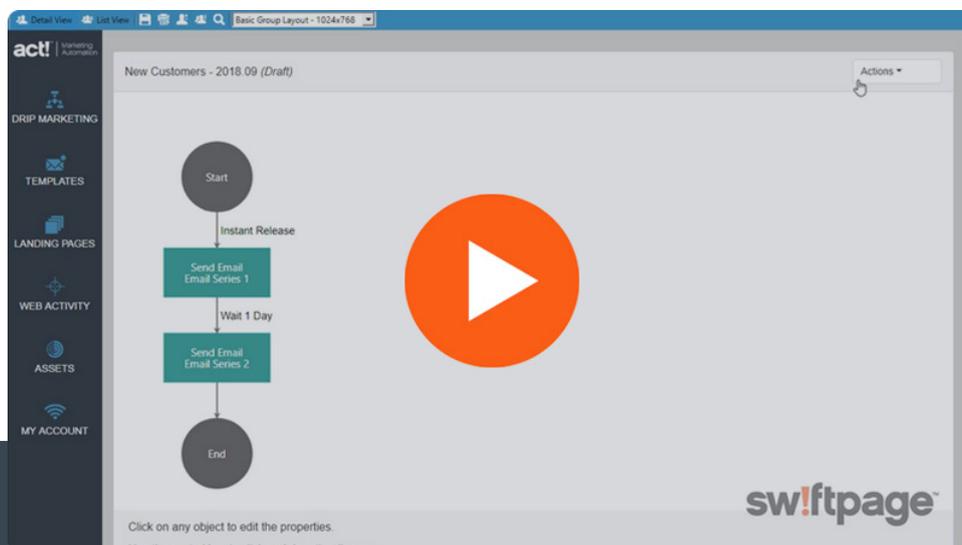
To view all training videos, visit www.act.com/amavideos

Step 4

Grow your audience

Grow your audience with effective lead capture forms and surveys that feed contacts and responses into Act! automatically. Here's how to get started:

- Create a lead capture form. Go to the Landing Pages section within Act! Marketing Automation and click on *Actions → New Page* in the top-right corner of the screen.

- Populate your landing page information, including page name and page type (be sure to choose "Page Designer" from the Page Type dropdown).

- Once complete, watch the step-by-step video tutorial below to finish creating your form.
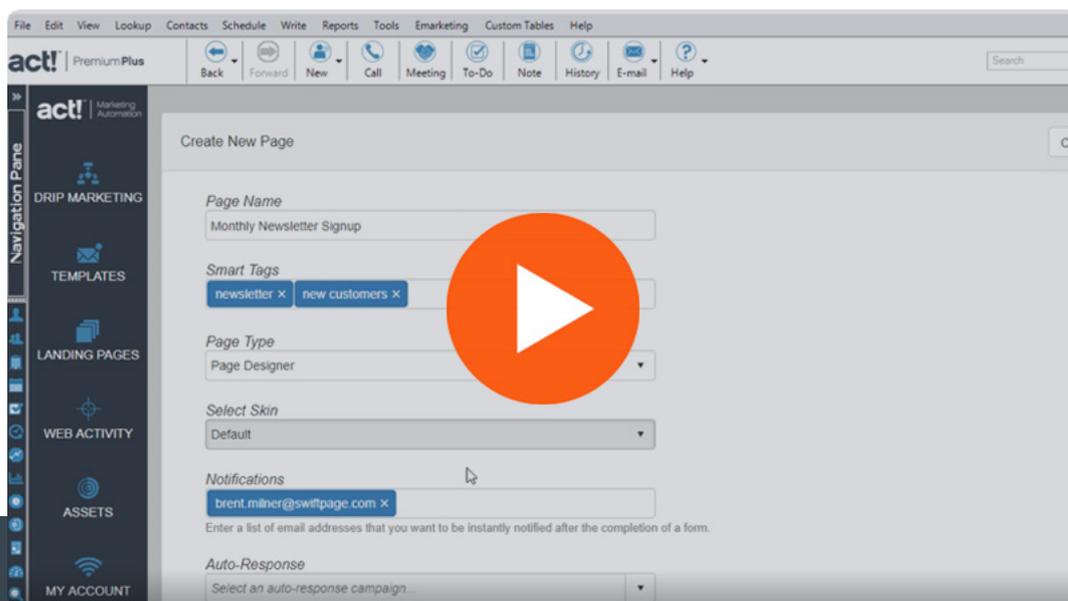
To view all training videos, visit www.act.com/amavideos

Step 5

Review your campaign performance and optimize for maximum effectiveness!

It's time to see how your test campaign has performed!

- Since you are the recipient of your test campaign, be sure to open and click on the test email you received.

- Review your campaign results in the Drip Marketing section of Act! Marketing Automation—open your campaign, click on the relevant email action stage and view email statistics.

- View your campaign results in Act! by viewing your Contact record and opening the Campaign Results tab.
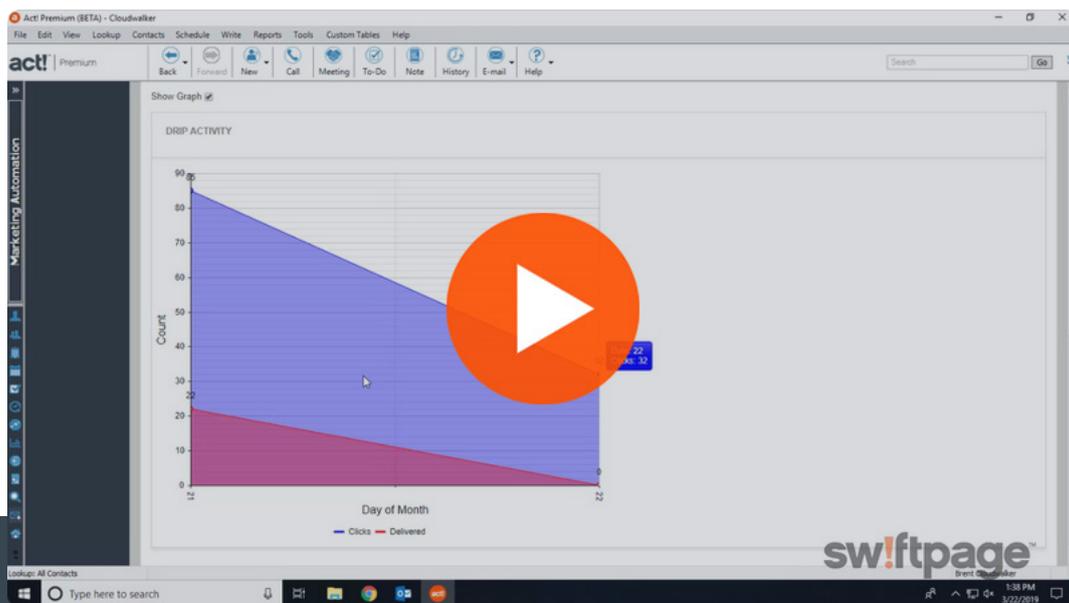
To view all training videos, visit www.act.com/amavideos

Additional Resources

■ ## Visit the Resource Center

Explore videos, tutorials, and best-practice guides in one place.

→   www.act.com/amaresources

■ ## Sign up for a live demo

See Act! Marketing Automation in action in our weekly live demo.

→   www.act.com/amademo

■ ## Watch training videos

Dive deep into Act! Marketing Automation with 30+ training videos.

→   www.act.com/amavideos

Call us at 888-760-0948

Visit **act.com**

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