

A man with a beard and a woman with short blonde hair and glasses are sitting at a desk in an office. The woman is holding a tablet and they are both smiling and looking at it. A laptop is open on the desk in front of them. The background is a blurred office environment with windows.

act!™

ACT! MARKETING AUTOMATION

5-Step Guide to Getting Started

Welcome to Act! Marketing Automation

In this guide, we'll take you through 5 easy steps to get started with Act! Marketing Automation.

To access Act! Marketing Automation, click on the **Marketing Automation** tab in the left navigation of Act!. **Note:** If you are running Act! on your local desktop, you will need to have **Act! Connect Link** installed to use Act! Marketing Automation. To install Act! Connect Link, [click here](#).

CONTENTS

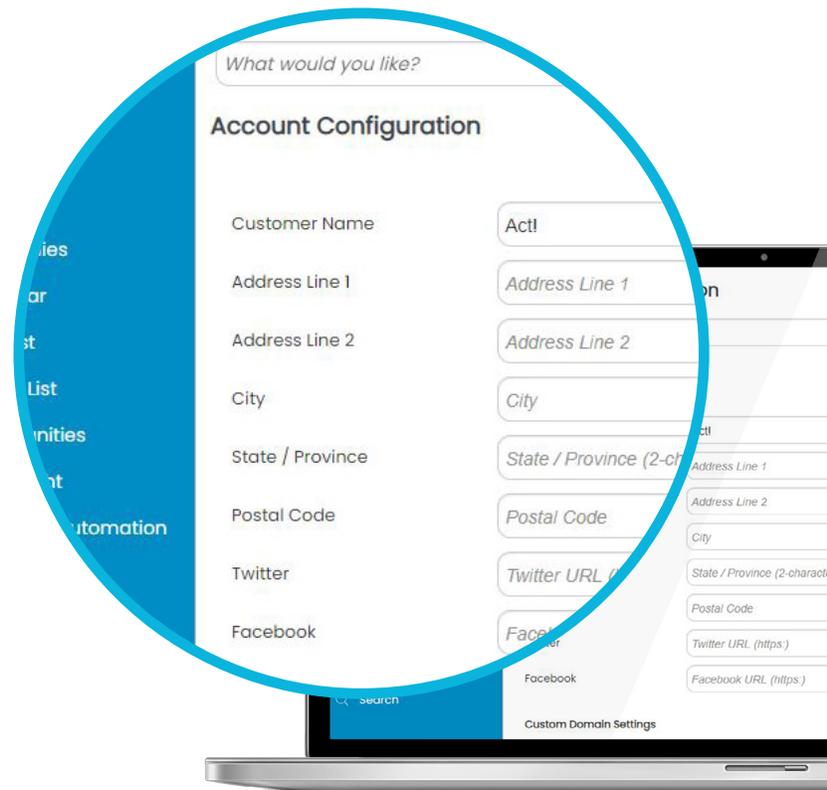
Step 1: Configure your account settings	3
Step 2: Create your first email template	4
Step 3: Set up your campaign	5
Step 4: Activate your campaign	6
Step 5: Review your campaign performance and optimize for maximum effectiveness!	7
Additional Resources	8

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
- 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:
act.com/amaaccountconfig

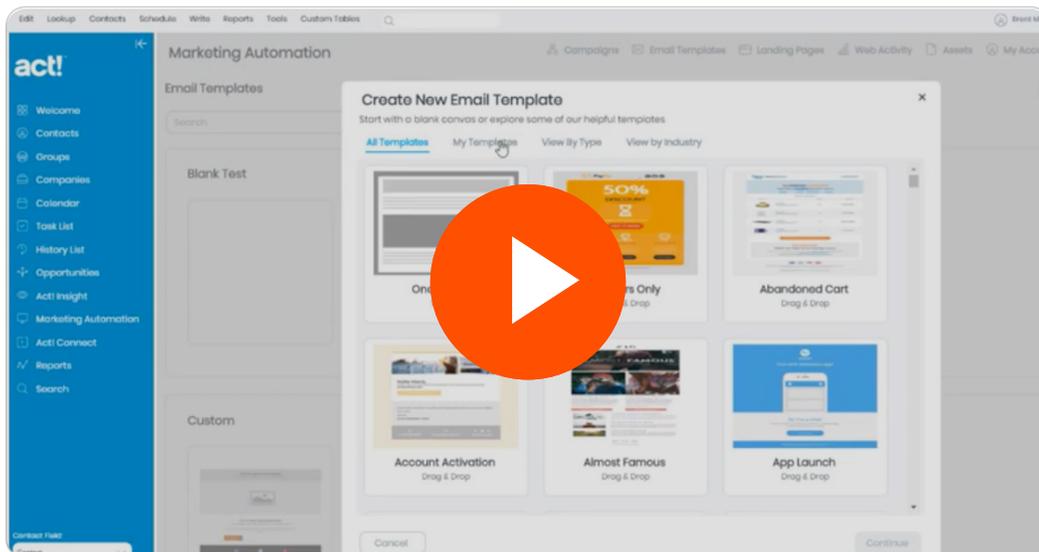
Step 2

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 the **Email Templates** link at the top of the screen, 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 the short video below and visit act.com/amatemplates



To view all training videos, visit:
act.com/amavideos

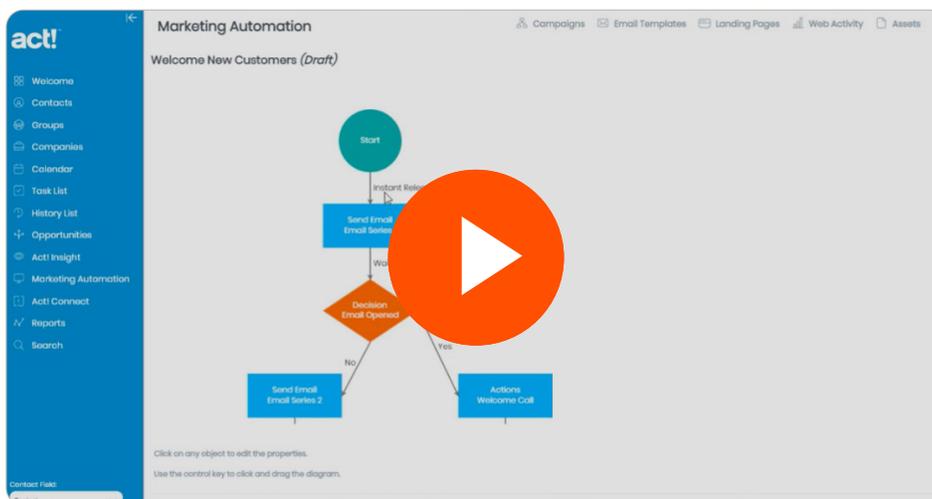
Step 3

Set up your campaign

You're ready to set up your first campaign!

- To begin creating your campaign, click on the **Campaigns** link at the top of the screen, and then in the top-right corner of the screen, click on **Actions > New Campaign**.
- 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.
- To create positive sender reputation and increased deliverability, check out our guide, [Email Ramp Up Procedure for your Act! Marketing Automation](#)

For a detailed look at how to create your campaign, watch this short video and visit act.com/amacampaigns



To view all training videos, visit:
act.com/amavideos

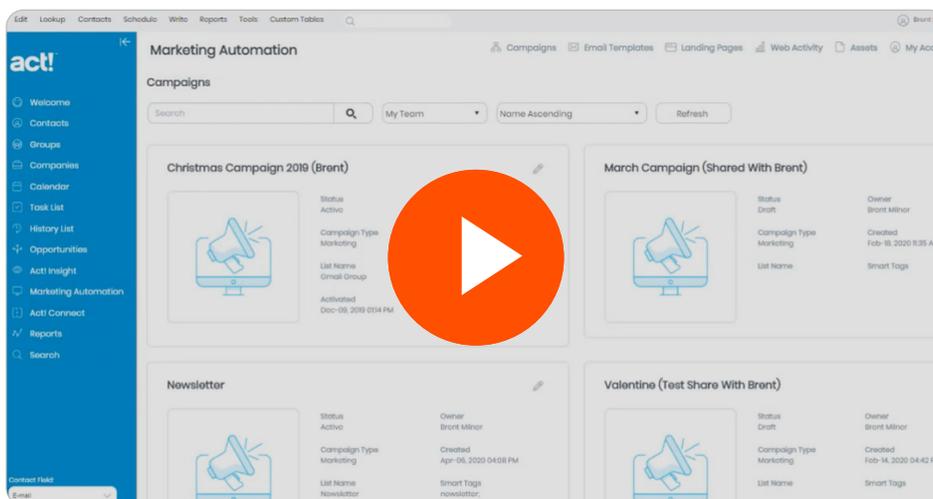
Step 4

Activate your campaign

Now that you've created your campaign and built your campaign workflow, you're ready to activate it!

- Navigate to the campaign you want to activate—open your campaign, and click on **Actions > Activate** in the top-right corner of the screen.
- Act! Marketing Automation will check to see if your campaign has any errors that need to be resolved. If so, the Activate Campaign button will be grayed out and you'll be provided with details on the errors that need to be resolved.
- When ready, click the Activate Campaign button to activate your campaign!

Watch the video below for step-by-step instructions on how to resolve common errors!



To view all training videos, visit:
act.com/amavideos

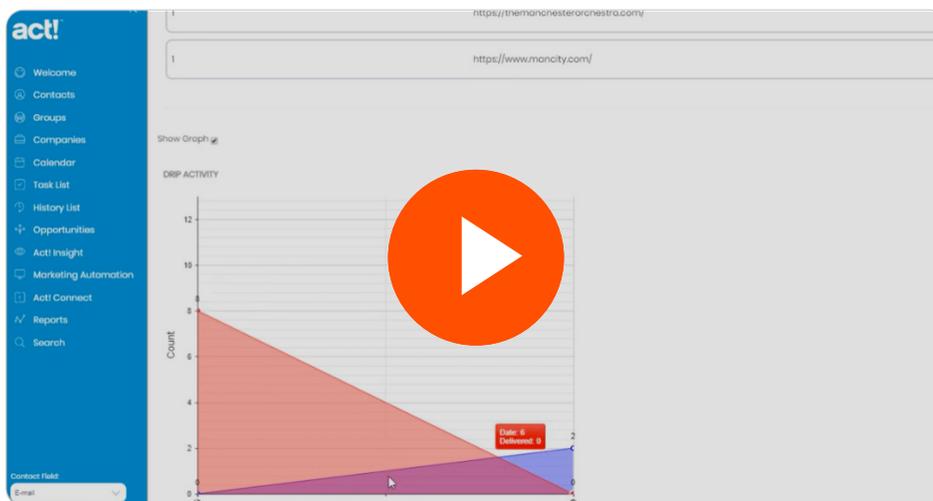
Step 5

Review your campaign performance and optimize for maximum effectiveness!

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

- To review your campaign results, go to the Campaign section of Act! Marketing Automation, select your desired campaign and then click on the email in your workflow you'd like to analyze.
- In the Edit Email Step dialogue, choose the **View Email Statistics** option in the dropdown and click **Go**.

For a detailed look at how to review your campaign results, watch this short video.



To view all training videos, visit:
act.com/amavideos

Additional Resources

Visit the Resource Center

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

Watch the on-demand webinar, [Setting up Emarketing](#)

Everything you need to know about important setup tasks that need to be completed before you send your first email marketing campaign.

Watch training videos

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

Learn more about Marketing Automation

Check out [What is Marketing Automation?](#) to learn more about what marketing automation can do for you.

For more information about Act! products visit act.com or call us at [888.760.0948](tel:888.760.0948).

