

ActiveCampaign Automation

How to set up an Automated Email System

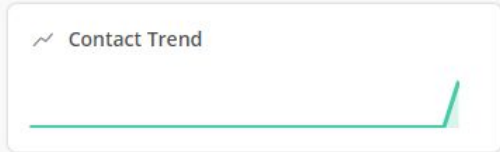
- >
- Search
- Contacts
- Campaigns
- Automations
- Deals
- Lists
- Forms
- Apps
- Settings
- Lynn

Click on Automations

Getting Started
6 of 9 complete
67%

- Create a Deal
- Integrate Services
- Track Site Activity
- Create a List

All Contacts
17



News
Announcing our Improved Navigation

- Campaigns
- Your April Website Stats [DRAFT]
 - Boating Magazine Reader Survey [DRAFT]
 - New Condo Opens Soon!
 - Updated Login Information
 - Summer Soccer Camp Preview Issue

Automations
test

Create New Campaign

Recent Activity

- 1 Subscribed
13 hours ago

Help

Automations

Automations

Manage Messages

Automations

STATUS All LABEL Any SORT BY Last Edited Search Automations...

[Show Start Triggers](#)

<input type="checkbox"/>		test Add Label +	
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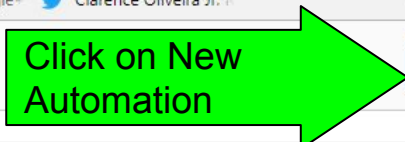
AUTOMATION STATS

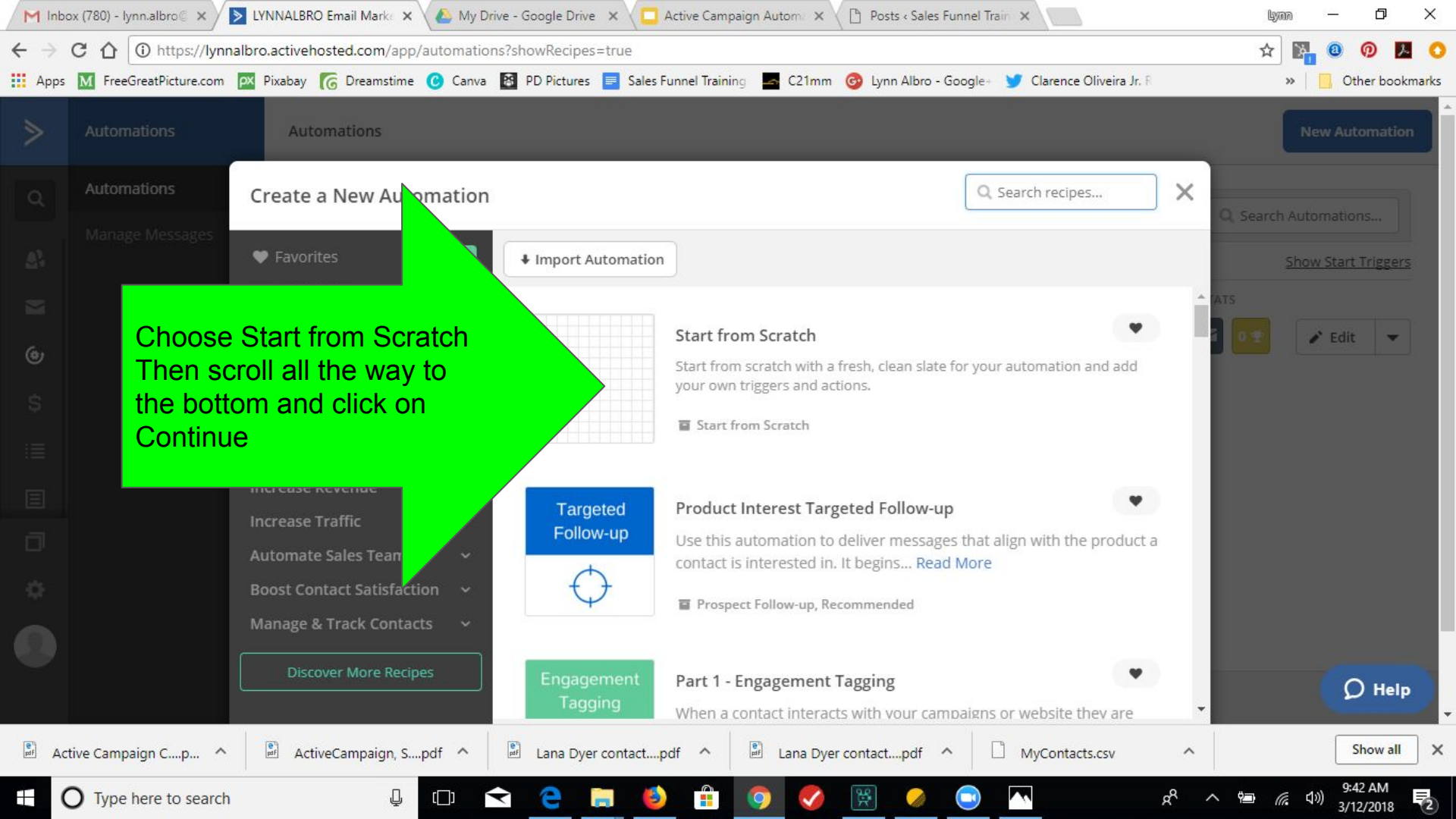
0 0 2 0

Edit

ROWS 10 Showing 1-1 of 1 Automations

Help

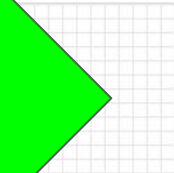




Choose Start from Scratch
Then scroll all the way to
the bottom and click on
Continue

Create a New Automation

↓ Import Automation



Start from Scratch

Start from scratch with a fresh, clean slate for your automation and add your own triggers and actions.

Start from Scratch



Product Interest Targeted Follow-up

Use this automation to deliver messages that align with the product a contact is interested in. It begins... [Read More](#)

Prospect Follow-up, Recommended



Part 1 - Engagement Tagging

When a contact interacts with your campaigns or website they are

Help

Show all



How will a contact enter your automation?

These are ALL trigger actions available to start an automation.

Subscribes to a list	Unsubscribes from a list	Submits a form	Opens/reads an email	Clicks a link in an email

Start Without a Trigger ?

Buttons: Back, Continue

Choose Subscribes to a List, Then Click Continue.

Automations / Automation 2 Saved at 14:30 View Contacts Draft Inactive

Action options (Contact subscribes to a list)

Select list: test2

Runs: Or

ADVANCED

- Any list
- Test
- test2

Back Add Start

Search actions...

Send a site message

Send SMS

Notify someone

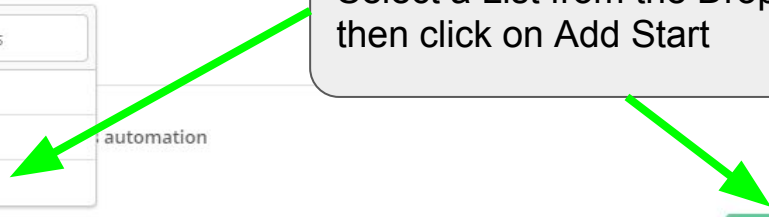
Conditions and Workflow

Contacts

CRM

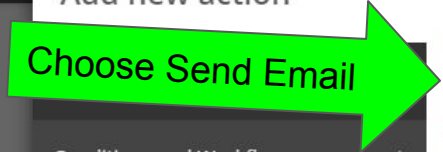
Help

Select a List from the Drop-down, then click on Add Start






Name your a

Add new action



Choose Send Email

- Conditions and Workflow >
- Contacts >
- CRM >

-  **Send email**
Send an email campaign to a contact.
-  **Send a site message**
Send a message that will appear on your website to a contact.
- Send SMS**
Send a SMS to the contact or admin user.
-  **Notify someone**
Notify up to 5 email addresses at once that the contact has reached this point in an automation.

Actions

Search actions...

Sending Options

- Send email +
- Send a site message +
- Send SMS +
- Notify someone +

Conditions and Workflow v

Contacts v

CRM v

Help

Automations / Save Saved at 09:51 View Contacts Active Inactive

Name your automation here

Start this automation when one of these actions takes place

Contact subscribes to list test2 Add new trigger

Send email

You don't have any emails to send. You [need to create an email](#) to get started.

Close

Actions

Search actions...

Sending Options

- Send email
- Send a site message
- Send SMS
- Notify someone

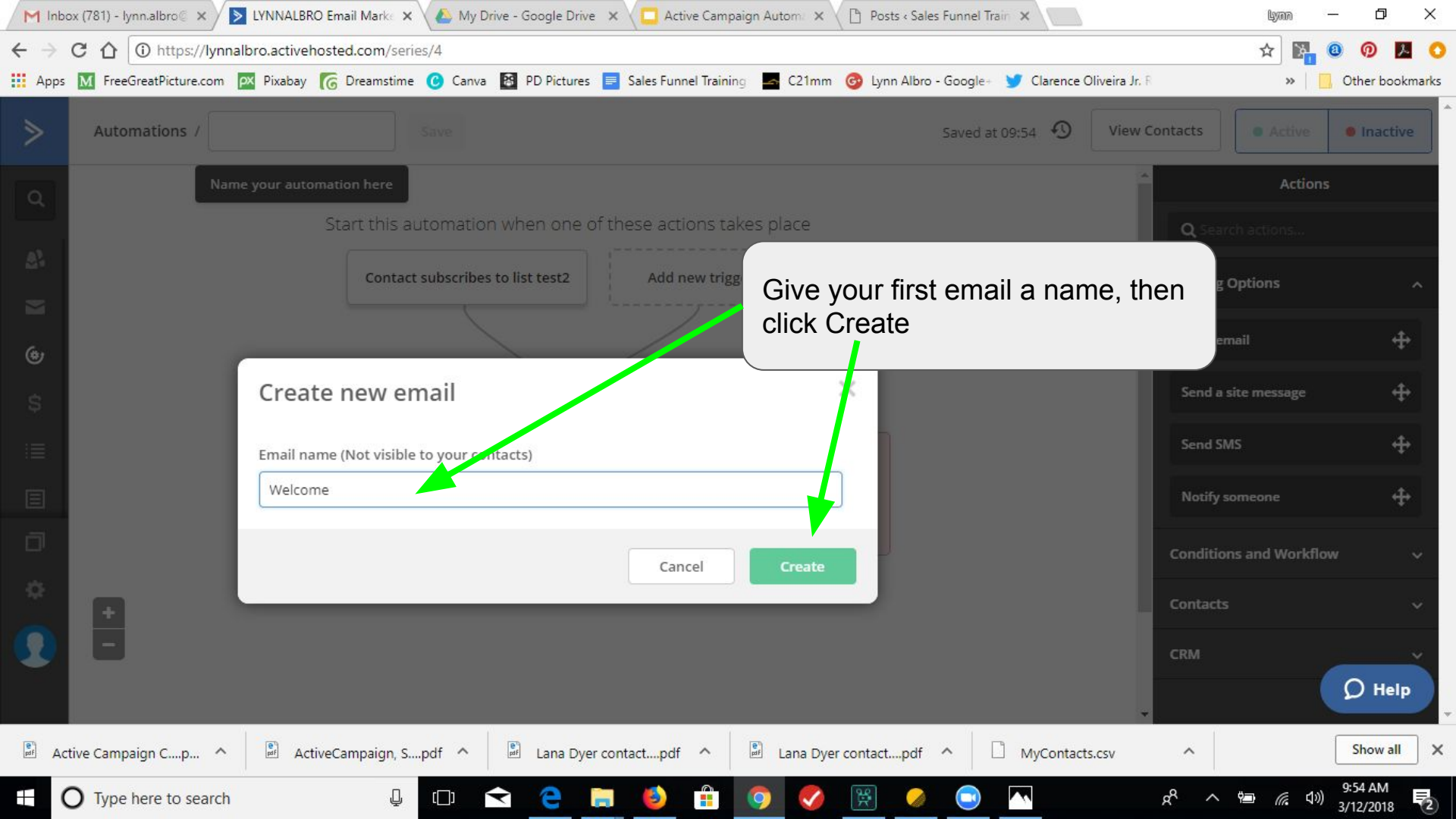
Conditions and Workflow

Contacts

CRM

Help

Click on Create an Email



Give your first email a name, then click Create

Create new email

Email name (Not visible to your contacts)

Welcome

Cancel

Create

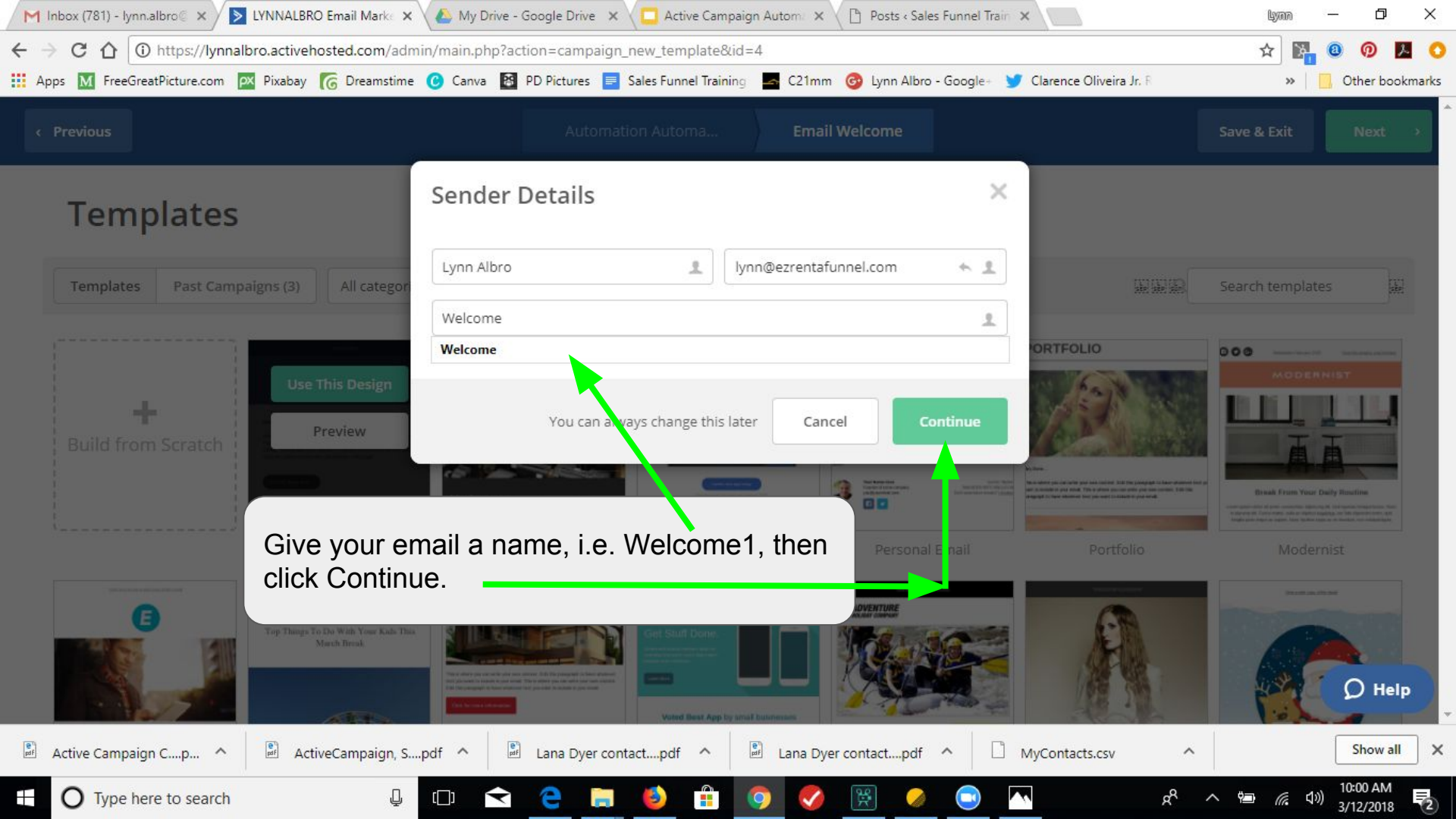
Templates

Templates | Past Campaigns (3) | All categories | Search templates

The grid displays several email templates. The 'Welcome' template is circled in green and has a red arrow pointing to it from a text box. Other templates include 'Staccato' (a keyboard), 'App Announcement' (a mobile app interface), 'Personal Email' (a person's profile), 'Portfolio' (a woman's portrait), and 'Modernist' (a modern interior).

Let's start with this simple Welcome email template, just hover over it and click on Use This Design

The second row of templates includes 'E' (a man reading), 'Top Things To Do With Your Kids This March Break' (a globe), 'HOMEDECOR' (a house), 'Get Stuff Done' (two smartphones), 'ADVENTURE' (people rafting), and a 'Help' button. A 'Show all' button is also visible at the bottom right.



Sender Details

Lynn Albro

lynn@ezrentafunnel.com

Welcome

Welcome

You can always change this later

Cancel

Continue

Give your email a name, i.e. Welcome1, then click Continue.

Help

Active Campaign C....p...

ActiveCampaign, S....pdf

Lana Dyer contact....pdf

Lana Dyer contact....pdf

MyContacts.csv

Show all

Type here to search

10:00 AM
3/12/2018

To remove the fields you don't need, hover over the field, click on the gear icon, click on Delete This, then click on Yes after Are You Sure.

Welcome

Hi **FIRSTNAME%**,

Thank you for signing up with us. This is your welcome paragraph. Write anything you want here. Simply click on the text block and click on the gear icon. You can also style this area of content by clicking on the text block and clicking on the options found in the right sidebar of this page.

Let's go there now →

- Duplicate this content block
- Make conditional
- Hide on mobile devices
- Save to content library
- Delete this content block

Insert

Options

Blocks | Saved

- Text Block
- Image
- Button
- Video
- Line Break
- Spacer
- RSS Feed

Help

Color selection: Blue | Size: 0 px

Text alignment: Left | Width: 650 px | Checkmark

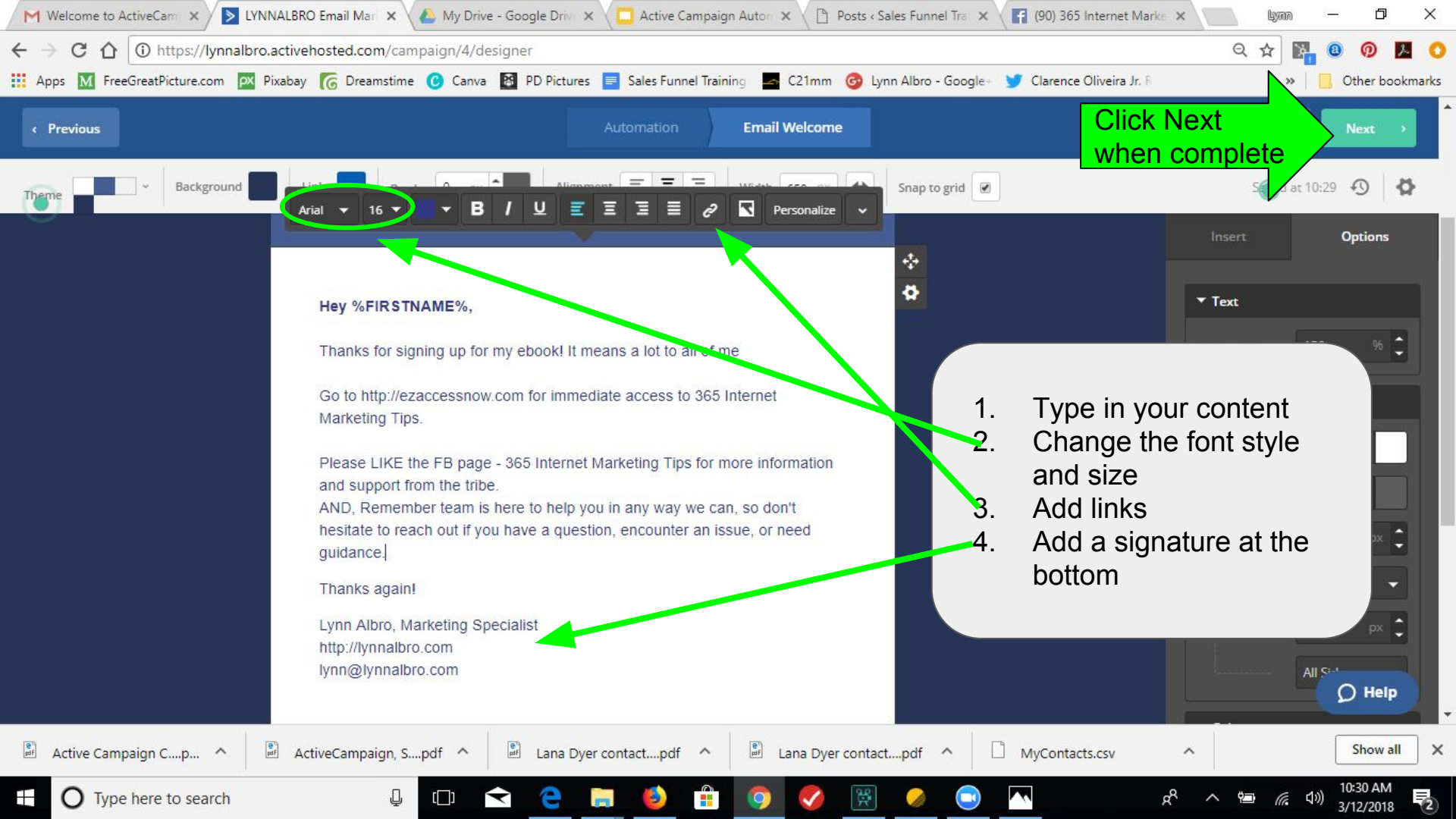
Rich text editor toolbar: Arial, 16, Bold, Italic, Underline, Bulleted list, Numbered list, Indent, Outdent, Link, Image, Personalize

Highlight the content you need to replace to remove it.

Hey %FIRSTNAME%,
Welcome and thanks for signing up with us. This is your welcome paragraph. You can write anything you want here. Simply click on the text to start editing. You can also style this area of content by clicking on the text and then using the options found in the right sidebar of this page.

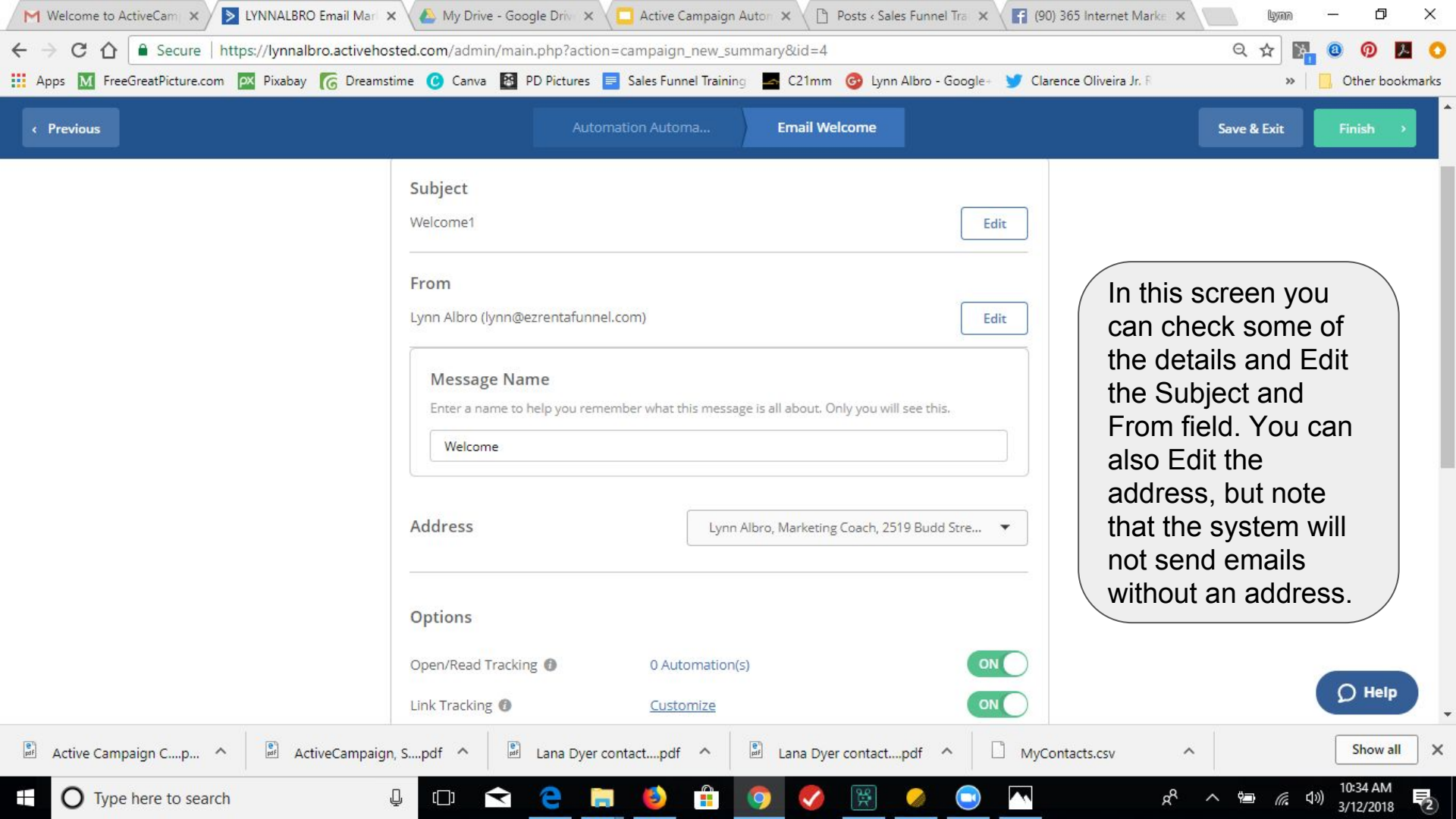
Options sidebar: Insert | Options | Text | Line Height: 150% | Block | Background: #FFFFFF | Border: 0px | Margin: 0px | All Sides | Padding: 50px | Help

%SENDER-INFO-SINGLELINE%
[Update your subscription](#) — [Unsubscribe](#)



Click Next when complete

1. Type in your content
2. Change the font style and size
3. Add links
4. Add a signature at the bottom



< Previous

Automation Automa...

Email Welcome

Save & Exit

Finish >

Subject

Welcome!

Edit

From

Lynn Albro (lynn@ezrentafunnel.com)

Edit

Message Name

Enter a name to help you remember what this message is all about. Only you will see this.

Welcome

Address

Lynn Albro, Marketing Coach, 2519 Budd Stre... ▼

Options

Open/Read Tracking ⓘ

0 Automation(s)

ON

Link Tracking ⓘ

[Customize](#)

ON

Help

In this screen you can check some of the details and Edit the Subject and From field. You can also Edit the address, but note that the system will not send emails without an address.

Active Campaign C....p... ^

ActiveCampaign, S....pdf ^

Lana Dyer contact....pdf ^

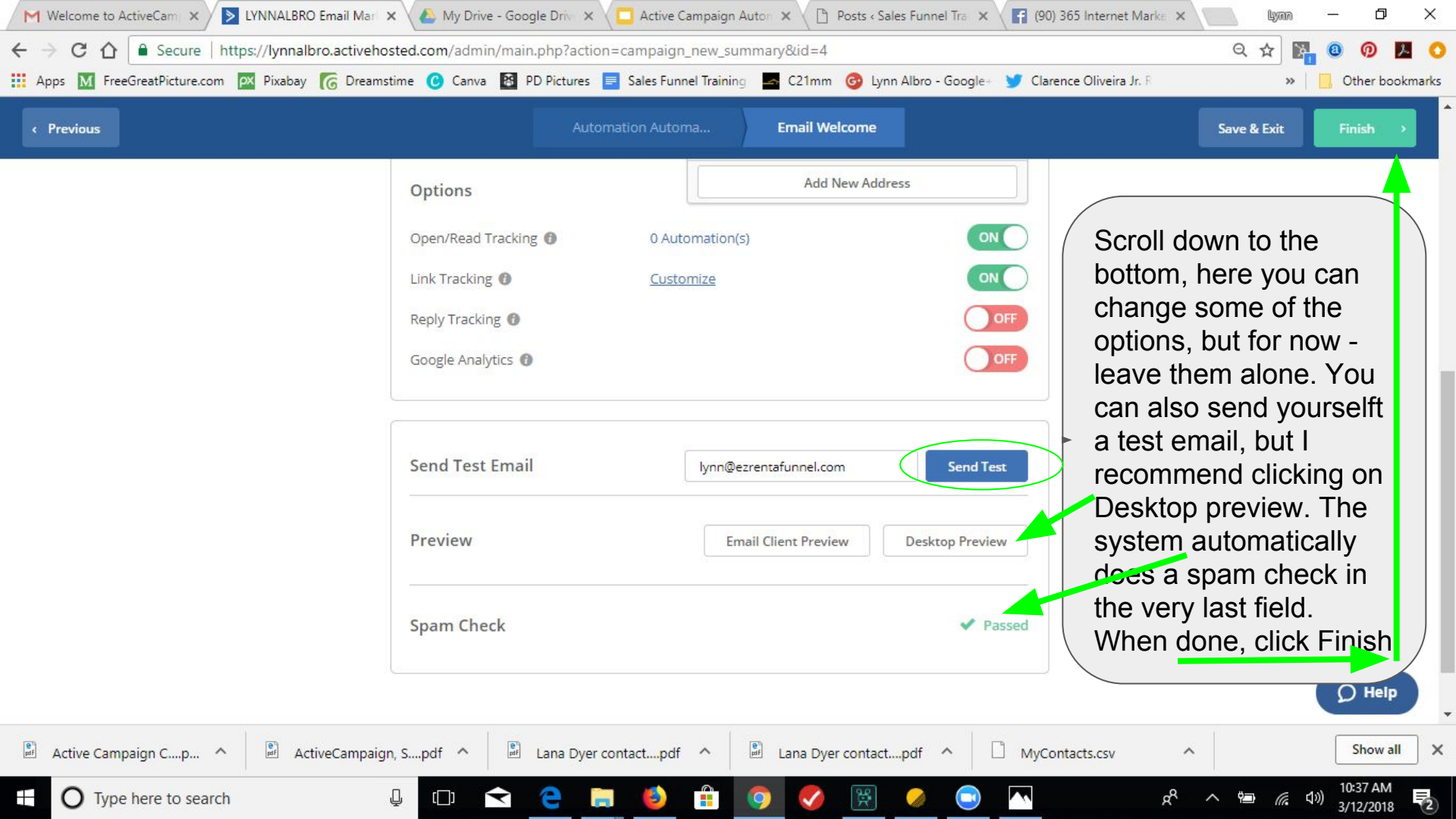
Lana Dyer contact....pdf ^

MyContacts.csv ^

Show all X

Type here to search

10:34 AM 3/12/2018



Options

- Open/Read Tracking 0 Automation(s) ON
- Link Tracking [Customize](#) ON
- Reply Tracking OFF
- Google Analytics OFF

Send Test Email

lynn@ezrentafunnel.com Send Test

Preview

Email Client Preview Desktop Preview

Spam Check

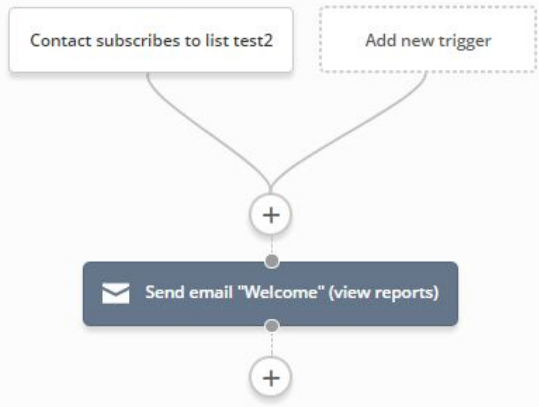
✓ Passed

Scroll down to the bottom, here you can change some of the options, but for now - leave them alone. You can also send yourself a test email, but I recommend clicking on Desktop preview. The system automatically does a spam check in the very last field. When done, click Finish

Help

Name your automation here

Start this automation when one of these actions takes place



This is what your Automation screen looks at this point, with just the Welcome1 email. In the next training we will show you how to add the Welcome2 email.

Actions panel with search bar and categories:

- Search actions...
- Sending Options**
 - Send email +
 - Send a site message +
 - Send SMS +
 - Notify someone +
- Conditions and Workflow
- Contacts
- CRM

Help button at the bottom right.