



Checklist 11 - Active Campaign Setup

Project Name: _____

Date: _____

Part 1 - Create Your List

		Yes	No
1	Click Lists in top menu.	<input type="checkbox"/>	<input type="checkbox"/>
2	Click Add New List	<input type="checkbox"/>	<input type="checkbox"/>
3	Enter your list name	<input type="checkbox"/>	<input type="checkbox"/>
4	Enter your website URL	<input type="checkbox"/>	<input type="checkbox"/>
5	Enter your product name or a reminder to subscribers.	<input type="checkbox"/>	<input type="checkbox"/>
6	Click Create List	<input type="checkbox"/>	<input type="checkbox"/>

Part 2 - Create Your Optin Form

		Yes	No
1	Click Forms in top menu	<input type="checkbox"/>	<input type="checkbox"/>
2	Click New Form	<input type="checkbox"/>	<input type="checkbox"/>
3	Enter Form Name	<input type="checkbox"/>	<input type="checkbox"/>
4	Leave on Inline Form	<input type="checkbox"/>	<input type="checkbox"/>
5	Choose Action Subscriber to list	<input type="checkbox"/>	<input type="checkbox"/>
6	Choose the list you created in part 1	<input type="checkbox"/>	<input type="checkbox"/>
7	Click Add action, add a tag and enter a tag (ex. Leads, checklist)	<input type="checkbox"/>	<input type="checkbox"/>
8	Click Create	<input type="checkbox"/>	<input type="checkbox"/>
9	Remove the headline and description if not needed.	<input type="checkbox"/>	<input type="checkbox"/>
10	Click Option on the right and look for Form Action	<input type="checkbox"/>	<input type="checkbox"/>
11	Click the settings icon on form action	<input type="checkbox"/>	<input type="checkbox"/>
12	Turn Opt-in confirmation to OFF and click save.	<input type="checkbox"/>	<input type="checkbox"/>
13	Click Integrate and copy / paste the full embed code to your optin page.	<input type="checkbox"/>	<input type="checkbox"/>
14	Click Save & Exit	<input type="checkbox"/>	<input type="checkbox"/>

Notes



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Part 3 – Create Your Automation

		Yes	No
1	Click on Automations in the top menu	<input type="checkbox"/>	<input type="checkbox"/>
2	Click New Automation	<input type="checkbox"/>	<input type="checkbox"/>
3	Click Start from Scratch and click Continue	<input type="checkbox"/>	<input type="checkbox"/>
4	Click Subscribe to a list and click Continue	<input type="checkbox"/>	<input type="checkbox"/>
5	Select the list you created in step 1 and click Add Start	<input type="checkbox"/>	<input type="checkbox"/>
6	Add New Action will appear and choose Send Email	<input type="checkbox"/>	<input type="checkbox"/>
7	Choose an email and enter the email name (internal use)	<input type="checkbox"/>	<input type="checkbox"/>
8	Choose a template or create an email using the Follow-up Email Checklist	<input type="checkbox"/>	<input type="checkbox"/>
9	Enter your sender name, email and subject line and click continue	<input type="checkbox"/>	<input type="checkbox"/>
10	Click save and exit	<input type="checkbox"/>	<input type="checkbox"/>
11	Enter your automation name in the top left	<input type="checkbox"/>	<input type="checkbox"/>
12	Turn the automation to Active in the top right	<input type="checkbox"/>	<input type="checkbox"/>
13	Add any additional tags and score inside the automation.	<input type="checkbox"/>	<input type="checkbox"/>
14	Add any other follow-up emails and use Wait Actions to delay them.	<input type="checkbox"/>	<input type="checkbox"/>

Notes