Getting Started Checklist

From setting up your account to creating your first automation, we've mapped out your first action items in ActiveCampaign to help you get your footing and learn as you go.

Don't have an account yet?
Sign up for a free trial

Step One
Basic setup
- Watch: Getting Started with ActiveCampaign in 6 Minutes
- Do: Add your physical address and turn on site tracking

Step Two
Add contacts
- Watch: Importing contacts into ActiveCampaign
- Do: Create your first list and name it "All Contacts," then import your contacts

Step Three
Manage contacts
- Watch: Create a form
- Do: Create a "Subscribe" form to let new contacts opt-in to your email list, and customize your confirmation opt-in message

Step Four
Group contacts
- Watch: Learn about segmentation
- Do: Use the segment builder to create your first segment

Step Five
Send your first email
- Watch: Learn about email campaigns
- Do: Create an email template and send your first email

Step Six
Automations
- Watch: Three steps to building your first automation
- Do: Import the Welcome Series automation recipe
Tip: Designate a "test" email address you can use to test your automations and campaigns. (ex. youremail@test@yourcompany.com)

Step Seven
Check in
- Checking in: Have questions? Need more guidance? Schedule a 1-on-1 with our Customer Success team for some personalized help

Step Eight
Automate your sales
- Watch: Deals CRM
- Do: Create your first pipeline

Join the ActiveCampaign Community
Continue to learn and get more support by joining our active online community.

Bring your questions to a 1-on-1 with the Success Team:
activecampaign.com/learn/webinars

Connect with other users:
Facebook Group, Slack Channel, ActiveCampaign Forum