



- 1) Select Settings from the Menu
- 2) Under Email, Select Templates
- 3) Create a new Template and Save.
- 4) Create a new mailing list or select an existing mailing list.
- 5) Contacts – Filter for your Mailing List Tag by clicking the Filter Button (if button not visible, click down arrow in the search box)
- 6) Under Filter, select Add Custom Filter, select Mass Mailing List Tags from the dropdown menu, Contains, Your List
- 7) Save your Filter - Select Favorites and Save Current Search – Create Name
- 8) Select Lead Automation from Menu
- 9) Click Create – Name your Campaign, Select Normal Mode from dropdown and Partner under Resource (type res.partner to get Partner)
- 10) Click Activities – Name the Activity, Condition = True, Type = Email, Select your Template from the dropdown.
- 11) You can add Previous or Next Activities.
- 12) Save Campaign
- 13) Click Segment Button – Name Segment, Select Filter and select All Records (no duplicates) from sync mode dropdown.
- 14) Click Run on Segment & Campaign

For email templates, you must be in developer mode – Under Profile, select About & Activate Developer Mode.

Auto Responders save you time by continuing to communicate with your leads once you have it programmed.

Auto Responders increase sales by sending follow up and reminder messages.

Be clear on what your are going to deliver and the value of your offer.

Consider the next step your visitors should take after they receive the free gift and include as a call to action.