

Welcome to Ascent360! We are thrilled to partner with you as you get started making the most of your data. It is estimated that this checklist will require a few hours of your time during your first month. We'll be here for any Q's along the way! 😊

In this article:

- [Getting Started - Initial Steps](#)
- [Learning the Platform Basics](#)
- [Automating Email Campaigns](#)
- [Dive into Reporting](#)
- [Onboarding Checklist](#)

Getting Started - Initial Steps

- Update your billing address and payment method for Ascent360
- Historical Email Lists
 - Upload any historical email lists from previous mailing platforms. Examples include your unsubscribe/"opt-out" list, and your subscriber lists.
 - Once you have your lists, please fill out our "Load Request Form" --> [Data Load Requests](#)
 - 📌 **Note: we must receive your opt-out list prior to your first email send from Ascent360.**
- Platform Orientation Video (*Estimation 25 minutes*)
 - Watch our [Platform Orientation Video](#). This is a 25-minute video designed to familiarize you with the platform.

Learning the Platform Basics

- **Create your template:** Start using the [Email Designer tool - Designing an Email in Ascent360](#)
 - Make sure your footer contains your company name and address. This is required by law for all senders.
 - We automatically append an opt-out form link to the bottom of each email sent from Ascent360. This row is not visible in the email builder tool, so don't worry if you don't see it!
 - Once the email has your logo, custom colors and a footer, save the email as a Template.
 - This will allow you to easily create branded emails from this one template.
- **Start creating emails**
 - A welcome email – to send to new subscribers
 - A lapsed purchaser win-back email – to send to customers who haven't made a purchase in X months/years. (You can adjust this using the "Last Financial Purchase Date" field)

- A post-purchase thank you email – to send the day after someone makes a purchase.
 - You can create product-specific emails, such as a Mountain Bike thank you or a Road Bike thank you.
- **Set up an Email Signup Form**
 - A sign-up form is a way to collect new subscribers. You can build this in "Landing pages". This form can be embedded on your website by copying the embed/iFrame code.
 - If you have a 3rd party managing your website, reach out to your contact and let them know that you would like to embed a new form. Otherwise, you can embed this form yourself.

Automating Email Campaigns

- Automate your Welcome Email
 - Once you are finished editing your Welcome Email design, your email is ready to be automated.
 - We have created the audience to send this email to "Welcome Train 1". Please navigate to Audience Builder to review the criteria of this audience. You are welcome to change it as you see fit.
 - Resources: [Sending an Email](#)
 - Under the "Recurrence" area, you'll want to choose Daily. But always make sure your Audience only looks at one specific date– not a range. (You don't want people to receive this message more than once).
- Automate your Lapsed Purchaser and Post-Purchase emails
 - If you'd like our help with this, let us know! We'd be delighted to assist.
- Review your Newsletter Audience
 - We gave you a pre-built Newsletter Contact List that looks at customers that have interacted with you in the last 2 years (purchase or email engagement). However, since your email engagement data is likely in your previous platform, you may want to change this criteria. Our recommendation? Check out this pre-saved audience and see if it serves your business needs. If not, try creating a new audience.
 - **If you want your Newsletter list to include all "email contactable" people, adjust the criteria to look at "Email Permission = Yes" and only that. (Make sure to SAVE your audience)**
 - If you'd like us to review your newsletter list to ensure it includes the right people, contact our help desk.
 - Resources: [Creating an Audience](#)

Dive into Reporting

- [Email Reporting](#)
 - Now that you have a few emails up and running, review the email reporting pages.
- **Campaign performance** - here you can view and organize your emails into "campaign categories" and review attributed revenue for each email send.

Onboarding Checklist

Test yourself; do you have knowledge of the below items? (If not, we have articles on all these items!!)

1. Your Ascent360 Landing page is published and you're collecting email sign-ups
2. You know how to send and automate a daily recurring email.
3. You've used Audience Builder to build new audiences (or adjust + save an existing one)
4. Your newsletter audience is perfected.
5. An understanding of the email designer and how to build new emails
6. Saving an email template to create new email designs from
7. How to [save a row](#) in the email designer, such as your footer or a product row.
8. An understanding of the Ascent360 email reports.