Checklist

SETTING UP ACCOUNTS

Tick off the completed tasks as you set up an account. This allows you to set up the account at your own pace while giving you a great overview of what you've done so far and which tasks are incomplete.

CREATE A CLIENT ACCCOUNT

- ☐ Choose invoicing method
- ☐ Create a new account or send an invite to client

BRAND STYLES

- ☐ Logo
- ☐ Colors
- ☐ Fonts

EMAIL SETTINGS

- ☐ Email sender
- ☐ Email tracking
- ☐ Email domain

PAGE SETTINGS

- ☐ Tracking codes
- ☐ Custom domain

PRINT SETTINGS

- ☐ Pre-paid credits
- ☐ Tracking codes
- ☐ Print channels
- ☐ Custom domain

CONTACT SETTINGS

- ☐ Segments
- ☐ Contact data fields
- ☐ Account data fields

SMS SETTINGS

- ☐ Pre-paid credits
- ☐ SMS senders
- ☐ SMS keywords
- ☐ Tracking codes
- ☐ Custom domain

PAGE SETTINGS

- ☐ Tracking codes
- ☐ Custom domain

USERS & OWNER

- ☐ Add new users - choose a role
- ☐ Change account owner

ADD CONTACTS

- [ ] Add contacts mannualy
- [ ] Import a file of contacts
- [ ] Import contacts using a page in a flow
- [ ] Import using an External form in flow
- [ ] Import using API in flow
- [ ] Import using File import in flow

CUSTOMIZE TEMPLATES

- [ ] Email
- [ ] SMS
- [ ] Page
- [ ] Print (letter/postcard)

WARM-UP CAMPAIGN

- [ ] Copy the ready-made flow from Loopify Free Content flows
- [ ] Finalize and adjust the flow
- [ ] Import contacts
- [ ] Test the flow
- [ ] Go live with the campaign

APP STORE

- [ ] Alerts
- [ ] Coupons
- [ ] Notify
- [ ] Event booking

INTEGRATIONS

- [ ] API
- [ ] File import
- [ ] External form
- [ ] Import block in flow
- [ ] Abandoned cart

SHARE CONTENT

- [ ] Connect accounts to a Magic account
- [ ] Share templates
- [ ] Set sharing settings to images
- [ ] Share campaigns

Notes:

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Contact:

Consultations: success@loopify.com

Free support: support@loopify.com; Help Center

Guide: Account Setup Steps for You and Your Clients