



Welcome to Act-On!

Visit the [Onboarding Guide](#) in Act-On University to get a head start in the onboarding process. You can set up the items listed below prior to your first meeting with your Onboarding Manager – and get going faster.

NEW USER ITEMS CHECKLIST:

Technical requirements:

DKIM, Whitelisting, Custom Marketing Domain, & Beacon Tracker

Add users:

Marketing, Sales, From Addresses, & Privileges

Connectors set up:

CRM, webinar, social media, & web analytics

Standard fields:

List fields, CRM fields

Lists:

Marketing lists, CRM lists, segments, & test lists

Content to upload:

whitepapers, case studies, & banner images

[Check out the Onboarding Guide](#)

This handy guide will walk you through play-by-play execution of your onboarding journey and the creation of your marketing structure.