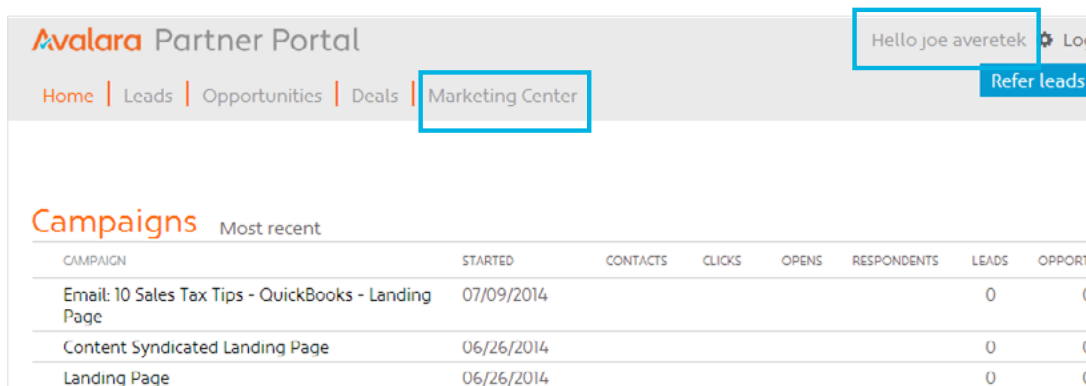
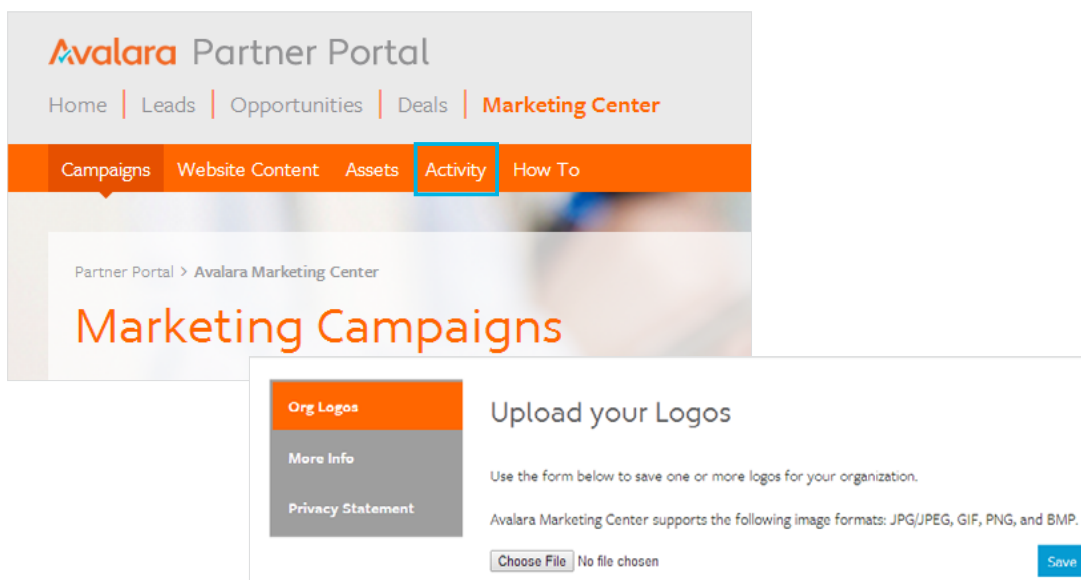


Avalara Marketing Center Partner Checklist

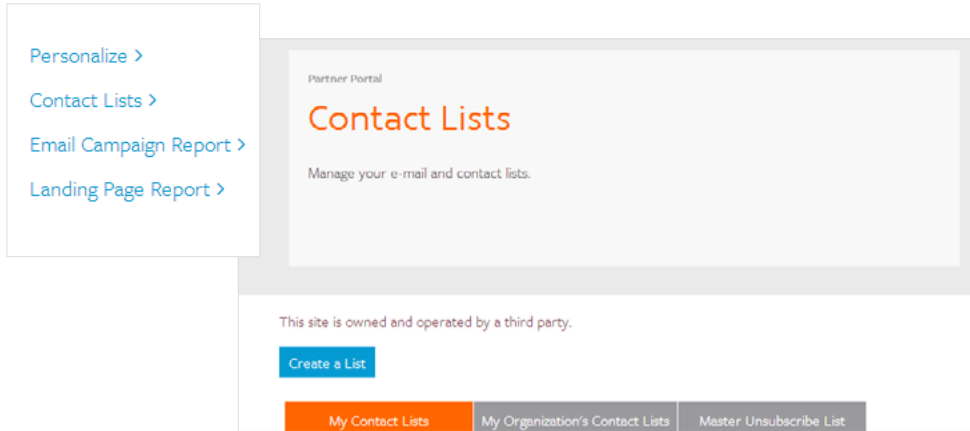
1. When entering your [Partner Portal](#) credentials, ensure your name shows up correctly in the top right corner. Then hit the **Marketing Center** link at the top to access the Avalara Marketing Center.



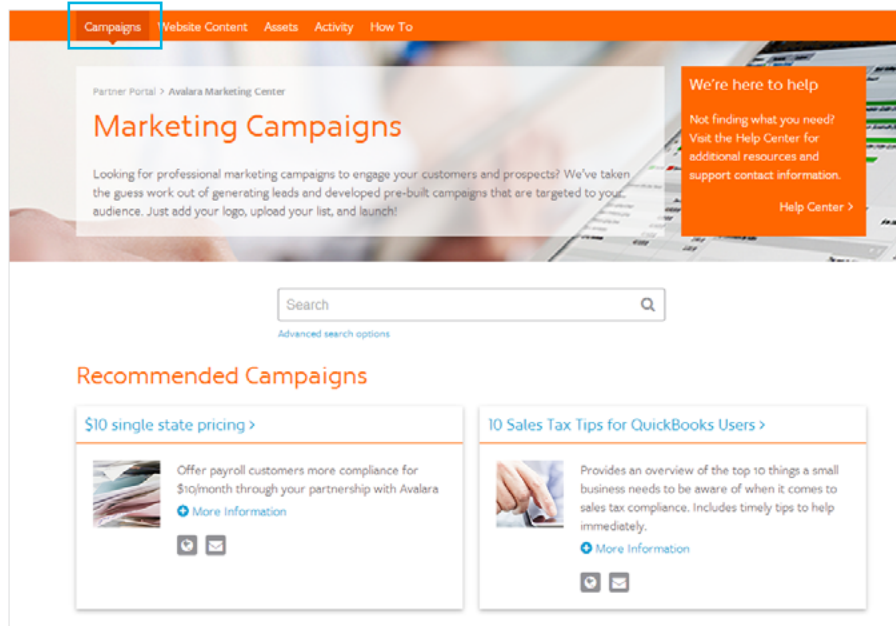
2. If this is your first time logging in to AMC, upload a logo for your organization. Click **Activity** at the top of your screen, then click **Personalize** on the right. You may then upload, save, delete and set default logos from the Org Logos tab on the *Personalize* page. The Avalara Marketing Center accepts JPG/JPEGs, GIFs, PNGs and BMPs for logo uploads. For best results, Avalara recommends uploading logos that are in more of a landscape format or are horizontally-oriented.



- You'll also need a contact list to execute emails. Click **Activity** again near the top of your screen and choose Contact Lists on the right side, under *Personalize*. Click the **Create List** button and follow the steps within to either upload a list or create your own manually. You may edit or export your list at any time by revisiting the *Contact Lists* page.



- Now you're ready to check out Campaigns! Click the **Campaigns** link near the top and view the Campaigns available to you. You can click **More Info** in each Campaign to see a preview of more information, and can click the **Campaign** link in order to view the activities and assets available within each Campaign. Click an **Activity** within the Campaign to execute an email, landing page or web content syndication activity, or download assets near the bottom of the Campaign.

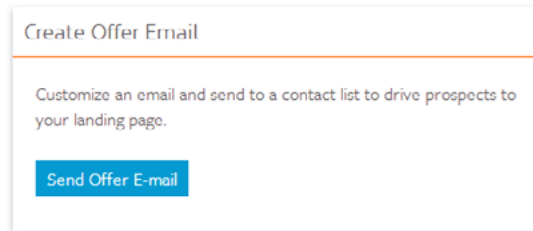


5. Customize *Activity* content however you like – if there’s a box around it, you can customize it! Click a box to use built-in text tools and enter your own content. You may also click on your logo at the top left to choose from the logos you uploaded earlier, and can click on the background image at the top of the activity to choose from a library of available images. Even the blue Submit buttons offer customizable text!

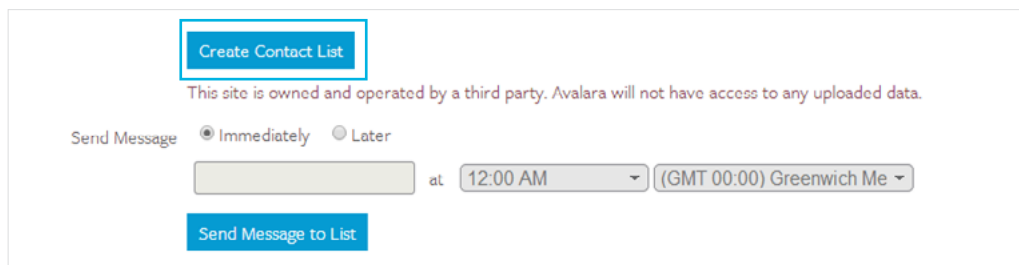
Note: If you’re unable to edit a certain area of text, that means Avalara has locked it from editing.

6. When saving your *Activity*, name it something unique that you’ll remember. You need to reference it later.

7. Take note of your landing page bit.ly URL and copy it somewhere if you don’t need to use it immediately. If using a linked activity (customizing a landing page that is linked to an email), make sure to click **Send Offer Email** once your landing page is ready. This lets you immediately customize and send your email activity.



8. When sending your test email message from the email customization workflow, send it to an Outlook-based email and a web email (such as Gmail, Hotmail or Yahoo!) to see how the email appears (if able).
9. Make sure you’ve chosen the right Contact List to send to. Not sure which one you’d like to use? Right click the **Activity** link at the top of your screen and choose ‘Open in New Tab’ so you can review your Contact List contents in another browser without interrupting your workflow. Need to create a new list? Just click the blue **Create Contact List** button below your collection of lists.



11. Want to view all available resources in the *Assets* section? Click the **Show All** link beneath the search filter.

12. If customizing a Web Content Syndication activity and you need to provide the HTML or iFrame embed code to someone else on your team, click the **Email embed code** link beneath the two HTML and iFrame embed boxes. Enter the email you'd like to send the code to and both sets will be sent to your indicated recipient.

Be sure to check the [Landing Page Report](#) to take action on leads as they are captured. If you have a problem with placing the Web Content Syndication landing page on your website, please contact your CDM or [Avalara Support](#).

Email embed code

Email

Separate multiple email addresses with a semicolon (;)

Send

Return to Campaign

13. Don't worry about resizing that Web Content Syndication activity if you're putting the code in place on your site – the template is built with responsive design in mind, so it will adjust to the placement within your site accordingly.
14. You can view your activity status, email and landing page report information by visiting the [Activity](#) page at any time.
15. Your lead activity will not only show up in the landing page report, but will also be reported in the Avalara Partner Portal.
16. Need more help? Contact your CDM or visit the [How To](#) page for videos, FAQ, help docs and benefit guides.

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what about Avalara's capabilities.

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