Before you create the automation process, you need to:

1. Create two testing newsletters and a testing contact status
2. Ask your administrator to help you:

- Create the users and set the roles and permissions that you will later use to manage the process
- Configure Kentico to allow you to run all the features demonstrated in the walkthrough

This walkthrough is based on the *Dancing Goat* sample site.

Creating testing newsletters

Create two newsletters that will be used by the sample automation process:

1. Open the **Email marketing** application on the **Email feeds** tab.
2. Click **New email feed** and enter the following details:
    - **Type**: select *Newsletter*
    - **Display name**: Coffee Co Merchandise Newsletter
    - **Code name**: leave the *(automatic)* option
    - **Subscription email template**: Sample subscription email template
    - **Unsubscription email template**: Sample unsubscription email template
    - **Sender name**: Coffee Co
    - **Sender email address**: Enter your email address
3. Click **Add templates** and select the *DG email template (2 zones)* template.
4. Click **Save**.
    - You are now on the **Configuration** tab of the new newsletter.
5. In the **On-line marketing** section, make sure both **Track opened emails** and **Track clicked links** are enabled.
6. Click **Save**.
7. Switch to the **Emails** tab and click **Create new email**.
8. Enter *Coffee Co Merchandise #1* as the name.
9. Click **Create**.
10. Compose a short email containing a link to your website.
11. Create another email and use *Coffee Co Merchandise #2* as the subject.
    - Compose another email linking to your website.
12. Return to the main **Email feeds** tab and create another newsletter.
    - Name the newsletter **Coffee Co Monthly Newsletter**.
    - Leave the rest of the details as in the first newsletter.
    - Don't create any emails for the second newsletter.

You now have two newsletters prepared for later use in the automation process.

See also: Email marketing

Creating a testing contact status

Create a contact status that will be used by the sample automation process:

1. Open the **Contact management** application.
2. Switch to the **Configuration -> Contact status** tab.
3. Click **New contact status** and enter the following details:
    - **Display name**: *Prospective client*
    - **Code name**: leave the *(automatic)* option
4. Click **Save**.

You have prepared a contact status for later use in the **Set contact status** step of the automation process.

See also: Assigning statuses to contacts

Creating testing users

Create two user accounts for administering the automation process:

1. Open the **Users** application.
2. Click **New user**.
3. Set the following details for the user:
    - **User name**: Travis
    - **Full name**: Travis McCoy
    - **Enabled**: Yes (selected)
    - **Privilege level**: Editor
    - **Assign to website**: Yes (current site)
4. Click **Save**.
5. Create another user with the following details:
    - **User name**: Matt
    - **Full name**: Matt McGinley
    - **Enabled**: Yes (selected)
    - **Privilege level**: Editor
    - **Assign to website**: Yes (current site)
6. Click **Save**.

Setting the roles and permissions

For the users to be able to perform their tasks, administrators need to add them to global roles with appropriate permissions.

Preparing the Marketer role

Create a **Marketer** global role and assign Travis into the role:

1. Open the **Roles** application and select *(global)* in the **Site** drop-down list.
2. Click **New role** and enter *Marketer* as the **Role display name**.
3. Click **Save**.
4. Switch to the **Users** tab and click **Add users**.
5. Select *Travis McCoy (Travis)* and click **Save & Close**.
6. Switch to the **Permissions** tab and choose **Module** in the first drop-down list.
7. Choose the **Contact management** module in the second drop-down list.
8. Allow all permissions in the **Contact management** module.
9. Choose the **Email marketing** module in the drop-down list and allow all its permissions.
10. Choose the **Online marketing** module in the drop-down list and allow all its permissions.

The *Travis* user account now has full control over automation processes, i.e. can design the entire sample process and fully modify its instances.

Preparing the Process Administrator role

Create a **Process administrator** role and assign Matt into the role:

1. Open the **Roles** application and select *(global)* in the **Site** drop-down list.
2. Click **New role** and enter *Process administrator* as the **Role display name**.
3. Click **Save**.
4. Switch to the **Users** tab and click **Add users**.
5. Select *Matt McGinley (Matt)* and click **Save & Close**.
6. Switch to the **Permissions** tab and choose **Module** in the first drop-down list.
7. Choose the **Contact management** module in the second drop-down list.

8. Allow the **Read** permission for the *Contact management* module.
9. Choose the **Content** module in the drop-down list and allow the **Read** permission.
10. Choose the **On-line marketing** module in the drop-down list and allow the **Read**, **Read processes**, and **Manage processes** permissions.

The *Matt* user account can now access the on-line marketing interface for modifying instances of running automation processes. You can always expand or reduce the permissions.

See also: Configuring permissions

Enabling On-line marketing

You need to track contacts in order to test the functionality of the sample process. Make sure that the on-line marketing functionality for tracking contacts is enabled:

1. Go to **Settings** (application) **->** **On-line marketing**.
2. Select the **Enable on-line marketing** box.
3. Click **Save**.

Configuring your SMTP server

To be fully able to test the process, you need to have an SMTP server configured correctly in Kentico. You can either configure it yourself as described on the Configuring SMTP servers page or contact your administrator.

Next page: Creating the process