

# EQUIPT360

## *email opt-in*

### Steps to Create an Email Opt-in

- ☐ Go to Sites and create a 1 or 2-step funnel (check for pre-made templates in your funnels)
- ☐ Create a form (include only the basic info like name, email, and possibly phone)
- ☐ Put your form on the first page of your funnel (we like using a pop-up for this)
- ☐ Create your opt-in PDF in Canva and upload to your media library (Media is found under Sites at the top menu)
- ☐ Get the link from you media library and place it in your Thank You Page or Form (if using a form, go to options and styles in the upper right corner, then choose options, and place your link after they submit the form)
- ☐ Create a Workflow that sends an email and delivers your PDF (Submit Form is the trigger you're looking for)