



MARKETING

Marketing — Getting Started

Step-by-step from new account to your first sent campaign. Settings, sending domains, contacts, audiences, your first send.

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UrTravelPro Marketing is an email marketing platform built exclusively for travel agencies. It lets you create email campaigns, build automated sequences, manage your contact lists, capture leads via forms, and design landing pages — all from one place. This guide walks you from a brand-new account to your first sent campaign.

Signing In

Marketing uses Single Sign-On (SSO). You sign in with the same UrTravelPro account you use for other UrTravelPro apps — there is no separate registration. Click **Get Started** on the home page and you'll be redirected to the UrTravelPro Core login. Once authenticated, you land on your Marketing dashboard.

First-Time Setup (5 Steps)

1. **Configure your settings.** Go to **Settings** and enter your agency name and mailing address. These are required for CAN-SPAM compliance and appear in the footer of every email you send.
2. **Verify a sending domain.** Go to **Sending Domains** and add your domain (e.g. `youragency.com`). Marketing gives you DNS records (DKIM and Return-Path) to add at your registrar. Once verified, you can send from addresses like `hello@youragency.com` instead of a shared default.
3. **Import your contacts.** Subscribed contacts from other UrTravelPro apps sync automatically. You can also import via CSV or add contacts manually from the **Contacts** page.
4. **Customize your branding.** Go to **Branding** to set your logo and brand colors — these are pulled into email templates and forms.
5. **Send your first campaign.** Go to **Campaigns** and click **Create Campaign**. The step-by-step builder walks you through compose, preview, and send.

ADVISOR TIP

The dashboard includes a Getting Started checklist that tracks your progress through these steps. You can dismiss it once you're ready.

Understanding the Core Concepts

Contacts

Every email you send goes to a Contact. Contacts have a name, email address, optional metadata (company, tags, custom fields), and a subscription status. Unsubscribed contacts are skipped from all future sends automatically.

Audiences, Segments, and Tags

- **Audiences** are manually-curated contact lists ("Newsletter Subscribers", "VIP Clients"). A contact can be in many audiences.
- **Segments** are saved filters that re-evaluate on every send ("Contacts who clicked any campaign in the last 30 days"). They're dynamic.
- **Tags** are simple labels you attach to contacts ("disney", "honeymoon") for ad-hoc grouping and filtering.

Campaigns vs. Automations

- **Campaigns** are one-time sends — newsletters, promos, announcements. You write it, schedule it (or send now), and it goes once.
- **Automations** are multi-step sequences triggered by an event ("contact joined audience", "form submitted"). They run forever for new contacts that match the trigger.

Forms, Popups, and Landing Pages

- **Forms** are embeddable HTML snippets you put on your existing website to capture leads.
- **Popups** are forms that overlay on top of your site (entry, exit-intent, scroll, timed).
- **Landing Pages** are full standalone pages hosted by Marketing (`marketing.urtravelpro.com/p/youragency/your-slug``) — useful for ad clicks, link-in-bio, or campaign-specific signups.

Your First Campaign in 5 Minutes

1. Go to **Campaigns** → **Create Campaign**.
2. Pick a starting point: blank, a template, or import from Canva.

3. Write a subject line and preview text (the gray line that shows in the inbox before opening).
4. Compose your email in the editor. Drag blocks (text, image, button, video) from the left panel.
5. On the Recipients step, pick the audience(s), segment(s), or tag(s) to send to.
6. On Review & Send, send a test to yourself, double-check everything, then schedule or send now.

ADVISOR TIP

Always send a test to yourself before pulling the trigger on a real send. Look at the test on both desktop and your phone — that catches 90% of issues before they reach your contacts.

Where to Go Next

- Set up your first **Automation** to welcome new subscribers automatically
- Create a **Form** and embed it on your website to start capturing leads
- Connect your **Canva** workflow with the Canva Import feature
- Check your **Reports** after sending to see opens, clicks, and revenue attribution