Getting Started

Jumpstart your SmartEngage journey with ease. Begin by Signing Up, then craft your unique Brand Avatar, and finally, explore the Dashboard Overview. Your path to successful engagement starts here.

- Day 1, Part A: Signing Up
- Day 1, Part B: Creating Your Brand Avatar
- Day 1, Part C: Dashboard Overview

Day 1, Part A: Signing Up

In this article we will cover the sign up process from start to finish.

Step 1: This is the first screen you will see after selecting to sign up. Please input a valid email address and a secure password. Click Continue

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Step 2: SmartEngage will inform you that an email has been sent to your registered address and that you must click to activate it in order to proceed.

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Step 3: Check for an email from SmartEngage. Open the email and click the link, Activate your account.

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Step 4: You are brought back to SmartEngage. Click that you are not a robot to continue.

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Step 5: Enter your First Name and Last Name. Then click Continue.

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Step 6: Enter a valid physical address as required by CAN-SPAM laws. Your message must include your valid physical postal address. This can be your current street address, a post office box you've registered with the U.S. Postal Service, or a private mailbox you've registered with a commercial mail receiving agency established under Postal Service regulations.

Then click Continue.

Step 7: You will then be redirected to your SmartEngage Dashboard where you will be prompted to Create Your First Brand Avatar

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Day 1, Part B: Creating Your Brand Avatar

Step 1: Enter the Brand (business) name as well as the main URL for the website. The sub domain is automatically created based on your entered Brand Name.

Then, click Next.

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Step 2: This step requires you to enter the email address and name you will be using to send email as.

In order to have the best deliverability possible we HIGHLY advise you follow this checklist:

1. **Your Sending Domain should be a real website that you own with content on it.**
2. **Your Sending Domain should be public, meaning WHOIS privacy is OFF.**
3. **Your Sending Domain should have a valid SSL Certificate**
4. **BONUS: Use a sending domain that has been online for a few years**

Then click "Verify" so we can confirm that your sending address is valid and able to receive mail.

You will also be asked to enter the "Reply To" email and name, but in most cases you can just click "Use Same as From" to use the same information for both.

Then click Next.

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Step 3: In case you are using a different mailing address for each brand avatar we allow you to configure that individually here. If you simply want to use the same address as the Master account during signup, then click the link, "Use Master Account Address" and it will automatically insert your address here.

Then click Next

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Step 4: This step is important to get the highest inbox rate possible for your email deliverability. It is recommended to complete this step now by playing the video and following along. Click the button to test that your records are properly set and then click Next.

You can click Next and do it later if you want though. If you need to reference the tutorial video for this please visit: https://smartengage.com/knowledge-base/books/adding-dns-records-for-spf-dkim

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Step 4 Now we must connect your Brand Avatar to a Facebook Page.

If you need to create a Facebook Page follow this link: https://www.facebook.com/pages/create

If you already have a Facebook Page for this Brand, click "Connect"

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Find your Facebook Page for this particular Brand Avatar and click "Connect"

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You will see a confirmation message that your Facebook page has successfully been connected.

Click Next

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Step 6: You will now be prompted to use the existing Facebook Page avatar (default) or change the photo by clicking on it to select something else.

Then, click Next

Step 7: The final step is to copy the tracking code and insert that into the <header> of all the websites you wish to track for SmartEngage. Additionaly, this script allows SmartEngage to create lead magnets on your sites without having to add any extra code snippets.

Then, click Complete.

NOTE: More details on adding your Tracking Code can be found here:

https://smartengage.com/knowledge-base/books/faq/page/how-do-i-add-the-tracking-code-to-my-website

In the event that you skip this and need to find your tracking code later please review this article:

https://smartengage.com/knowledge-base/books/faq/page/where-can-i-find-my-brand-avatars-tracking-code

After clicking Continue, please wait about 15 seconds for the page to refresh with your newly created Brand Avatar.

Day 1, Part C: Dashboard Overview

https://player.vimeo.com/video/286212887