

Smart Review Autopilot - Checklist for Burn The Box Group

1 Register for a SmartEngage Account

1. [Register here if you don't already have an account](#)
2. Go through the setup process
 1. You can click next when you get to the part about SPF and DKIM records and worry about that later

2 Copy The Master Sequence into Your Account.

1. Make sure you are logged into SmartEngage on the Avatar you want to receive the Review Automation Sequence.
2. Click This Link to Insert the template into your account: [CLICK HERE](#)
3. Click on your avatar in the top left and then "Manage/Integrate > Tag Manager"
 1. Create New Tag > Create a new tag such as: **ReviewTrigger**
4. Go to Engage > Automation > Click view/edit next to the template you copied into your account
 1. Configure the first START-IF block to use Tag Is Applied > #ReviewTrigger
 2. Open up each email block and Edit the Review link to be for the appropriate business
 1. To generate the GMB Review link use this resource: [GMB Link Generator](#)
 2. Or use this Chrome Extension to get the GMB Review Quick Link: [GatherUp Chrome Extension](#)
 3. Edit the email text to use the appropriate names and logos
5. Optional (but recommended) to click on your Avatar within SmartEngage > Manage/Integrate > Scroll to bottom and setup your SPF and DKIM TXT records.
 1. More information found here: [How to Setup SPF & DKIM Records](#)

3 Setup Google Sheet and Zapier Connection

1. Copy The Google Sheet Template into Your Account using: [This Link](#)
 1. Change the name to match the business name just to stay organized
2. Setup Zapier Using This Template: [Copy Template](#)
 1. NOTE: If you do not already have a Zapier account you will be prompted to create one.
 2. Configure the Google Sheet Trigger to use the Sheet that you copied into your account

3. Configure the SmartEngage Action to use your Avatar account
 1. Match First Name, Last Name, Email Address, and select the Trigger Tag you created: ReviewTrigger
4. Turn On Zap
3. Run a test by entering in a row of data in the Google Excel Sheet
 1. Share Edit Access of this Google sheet with the client/business owner/secretary

4 Final Notes



1. At this point it is recommended to make a short video explaining to the client/business that all they have to do is open up this Google Sheet and enter in the new customer information once they have been serviced.
2. It is also advised to inform the business that they should only enter customers here whom they feel have had a positive experience with their business.