# 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: <u>CLICK HERE</u>
- 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
  - 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: <u>GMB</u> <u>Link Generator</u>
    - 2. Or use this Chrome Extension to get the GMB Review Quick Link: <u>GatherUp Chrome Extension</u>
  - 3. Edit the email text to use the appropriate names and logos
- Optional (but recommended) to click on your Avatar witin 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.