



MANYCHAT SETUP CHECKLIST

- ☐ Sign up for a free [ManyChat.com](https://www.manychat.com) account.
- ☐ Follow instructions on screen to sign in with your PERSONAL Facebook account.
- ☐ Once you are signed in, follow instructions to connect your Facebook page - you will be signed in from your personal account, but will be connecting to fan PAGES.
- ☐ Follow along with the tutorial if you'd like
- ☐ Go to dashboard and upgrade your account by clicking the "Upgrade to Pro" button (You can continue using the basic features without upgrading, but it is highly recommended you upgrade at some point.) Follow prompts to enter your credit card information, etc.

General Settings

- ☐ In the left menu click "Settings". Now you'll see Bot Settings
- ☐ General Tab: Create a Greeting Text: This is the greeting people will see when they click "Send Message" from your Page before they begin interacting with your bot for the first time.
- ☐ Everything else under General settings can be left as is
- ☐ Live Chat Tab: you can change Live Chat Behavior. For now, we'll leave it on Any Message Starts A Conversation
- ☐ Under Personas in Live Chat (BETA Feature), check if you have more than one team member who will be answering live chats. This will allow them to be identified in the chat.
- ☐ Under Close all opened conversions, you can click this at any time to archive all the messages in your ManyChat "Live Chat" feature. This is useful as they build up.
- ☐ Under Sound Notifications, you can Allow or Turn Off Sound Notifications.
- ☐ Growth Tools Tab: Under Widget localization, you can change the language of the "Send Message" and the first message in Customer Chat.
- ☐ Under Authorize Websites, add all the website URL's that you plan to use ManyChat on.

- ☐ Notifications Tab: Enter your email to receive reports.
- ☐ Under Subscriber Reports, choose the frequency of the reports.
- ☐ Under Live Chat, check “Notify me on Messenger when a conversation is assigned to me” if you want to receive an email when you have a message to reply to.
- ☐ Under Notify Admin Actions, check Messenger & Email to receive notifications here. (Pro feature)
- ☐ Custom Fields tab: This is to create any fields you want to use to capture subscriber data. You can enter them now if you know what you want. Otherwise, they can be added at any time.
- ☐ Tags tab: This is to create any tags you want to use to apply as people take action and move through your bot flows. The tags can be used to segment and create if/then filters to guide the path for a user. You can enter them now if you know what you want. Otherwise, they can be added at any time.
- ☐ Users tab: Invite new team members you want to be able to access your account.
- ☐ Payments tab: You can connect your Stripe and/or PayPal accounts if you plan to sell products through Messenger (Note: Digital Products are not allowed to take payment directly in Messenger via FB Terms of Service)
- ☐ Integrations tab: This is where you’ll integrate with any of the listed tools. If the tool you want to integrate with isn’t listed, you can use Zapier to integrate. Follow the instruction links to know where to get API keys, etc.
- ☐ SMS tab (beta feature): If you wish to keep subscribers engaged via SMS text messaging, follow the instructions that link to ManyChat documentation for setting up SMS capabilities.
- ☐ Email tab: If you wish to send subscribers email through ManyChat’s email program, set this feature up according to the ManyChat documentation link. This is ManyChat’s email service, not a service provided by a tool like Infusionsoft, ActiveCampaign, Mailchimp, etc.
- ☐ Billing tab: You can update your Credit Card Information and view invoices.
- ☐ API tab: You can create your own token. (only for advanced programmers)

Growth Tools

Growth tools are entry points into your bot. Review the different types here:

<https://support.manychat.com/support/solutions/36000126767> We will focus on a Ref URL (basically a link) here, but the same basic instructions apply to many other growth tools. Messenger Ref URL is the Growth Tool we use the most. It allows us to send someone to a URL that we can place on banners, inside emails, inside FB messages, anywhere we wish. It gives us complete control of the design of the button and page and can be used in many ways. We generally have a Messenger Ref URL Growth Tool link on all our download pages and inside all our membership sites offering bonuses to encourage people to join our FB Messenger list.

- ☐ Click on “Growth Tools” on the side menu
- ☐ Click on “+ New Growth Tool”
- ☐ Under Other Growth Tools, Click “Messenger Ref URL”
- ☐ Enter The Widget Name by Clicking The Text Growth Tool # at the top
- ☐ Next, we’ll edit the opt-in message. Under Opt-in Message click Edit
- ☐ You can edit the default message any way you wish. You can add files, links, videos, audio, etc. You can also link to another step once that message is sent. First, edit the message.
Example. Welcome {firstname}! Thank you for subscribing. Your free gift coming in the next message so stay tuned. P.S. If you ever want to unsubscribe just type “stop”. (It’s important to let people know how they can unsubscribe - and remind them every once in a while)

(Wait and come back to this step) We’ll need to go create our flow for whatever you’re sending out first, but skip this for now, and then you’ll come back to finish setting up the Growth Tool. Your changes have been automatically saved, so it’s ok to leave this area without losing work.

- ☐ Skip to the “Create a Flow” Section below and then come back to this step. Let’s connect the Growth Tool to our flow.
- ☐ Next click the checkbox below which says “Continue to another step”.
- ☐ Click Choose Next Step
- ☐ Click Start Another Flow
- ☐ The Green Box will appear and again click “Select a Flow to start”
- ☐ Click “Click to Select a Flow
- ☐ Choose the flow you created below or any flow you wish.
- ☐ To return to the setup click the name of the widget along the top beside Growth Tools.

- ☐ Click Save and click Active.
- ☐ Click Next.
- ☐ Copy the URL provided under Your Messenger Ref URL.
- ☐ Use this link to send people to your growth tool and messenger bot any way you wish.

Create a Flow

Flows are the main sequences of messages that get sent to your subscribers. There are many different ways to use sequences. Think of it as an autoresponder where you deliver a series of messages. A few examples of how you can use this is to deliver free training via messenger, send reminders to attendees right before a webinar starts, to show product features – there’s no limit to your creativity! It’s important to apply tags to actions so you can segment people based on the actions they’ve taken.

- ☐ Click on Flows in the left menu and then click “New Flow”
- ☐ Give your flow a name
- ☐ Create your first message.
- ☐ Add a button linking them to your offer
- ☐ Add any other messages you wish to send and any additional buttons you want using the message types below the message screen.
- ☐ Click Preview to send a test message to yourself
- ☐ Click Publish to make your flow live once you’re satisfied
- ☐ Now, we’ll add tags. In the flow you just created, use the flow builder and navigate to where you put a button to your offer.
- ☐ When you click to edit the button, scroll down and select “Additional Actions”
- ☐ Select Add Tag and create a tag that indicates someone clicked on your link. Ex: Clicked_Offer Link
- ☐ When it drops down, click it so it will save.
- ☐ Add tags for any additional actions people take so you can later go back and create messages just for those people.
- ☐ Go back and finish connecting to your growth tool

Main Menu

At the bottom of the screen, you can have a menu available for people to navigate through your bot. You can have buttons that answer questions, or link to your website, for example

- ☐ In your [ManyChat](#) dashboard in the left menu click Automation.
- ☐ Click Main Menu. Click Edit Menu in the top right.
- ☐ Click + Menu Item and enter the name of the menu item
- ☐ Choose the type of item you wish to have
- ☐ Set up the menu items as prompted
- ☐ Return to the menu and click the + Menu Item again.
- ☐ Return to all links and add tags to everything link shown in previous checklists.
- ☐ Click Update Main Menu.
- ☐ View your menu on your Desktop PC and Mobile Phone to ensure everything looks correct.

Welcome Message

The welcome message is the one that appears if someone enters your bot through something other than a growth tool. This would usually be from your Facebook page “Send Message” button. You want to have a message here that introduces your bot, and instructs them on what they can do in your bot (give a free gift, look at FAQs, talk to a human, etc.)

- ☐ Go to your ManyChat dashboard in the left menu click on Automation.
- ☐ Click on Welcome Messenger in the left menu.
- ☐ Click Edit Message in the top right.
- ☐ Edit the default message to how you want to begin the conversation.
- ☐ Click the checkbox “Continue to another step”.
- ☐ Click Start another Flow.
- ☐ Click Start another Flow again and choose your first welcome flow or create a new flow with the options for the visitor.
- ☐ Click Save & Click Publish.

Keywords

As people start to use and interact with your bot, they will end up typing messages to the bot that do not go well with the default reply. It's a good idea to make note of these responses and create a keyword response based on when someone enters certain keywords. Examples are: what is this?, Can I talk to someone?, etc. Don't try to guess what people will type for now. Just wait until you get some responses back and add them as they come.

Congratulations!! You've completed the basic ManyChat Setup!

Now, you can continue to the additional setup items to make your bot integrate with other tools and complete your bot tech stack!