

SMM Planner — Getting Started

Guide · Create your org, invite the team, ship content

1. Create your organization

- Open the website and click Create an organization (or Get started).
- Enter company/organization name, your name, email, and password! Create organization
- Confirm your email if asked, then Sign in. You land on the dashboard as Admin.

Tip

You are the Admin of this org. Only Admins can invite teammates and manage roles.

2. Invite your team

- From the top nav open Team.
- Enter teammate email, choose role (Employee or Admin)! Send invite.
- Copy the invite link and send it (WhatsApp/email). They set a password on Welcome
- Pending invites clear when they join; they appear under Members.

3. Add brands

- On the home screen click + Add New Brand! Brand Name + Industry! Create.
- Click a brand pill to open it. Use Search brands when you have many clients.
- On mobile, tap the menu icon to open Brand Memory.

4. Fill Brand Memory (do this before generating)

- Basic Info: name, tagline, industry, audience, products, price range.
- Visual Identity: logo, colors, fonts, aesthetic, photography style, design notes.
- Voice & Tone: personality, tone slider, language, emoji use, caption length.
- Content Strategy: best formats/days, what worked, competitors, don'ts, hashtag bank.
- Click Save Brand Memory. Wait for Saved ' before generating.

Tip

Richer Brand Memory = more on-brand calendars, captions, and reel scripts.

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Content calendars, AI Reels, Excel export

5. Create a content plan

- Open a brand!' New Content Brief. Paste the client WhatsApp brief.
- Optional: Suggest Ideas to get content ideas you can click into the brief.
- Set Goal, Duration, Total Posts, Platforms, hashtags, Quick or Full slide/scene detail.
- Optional: Also generate an AI Reel script from this brief.
- Click Generate Content Plan. When ready, use the Calendar tab.

6. Work the Calendar

- Jump between days (side nav on desktop, chips on mobile).
- Per post: rate with stars, Copy, Edit (caption + note for AI), or Regenerate This Post.
- Open View Design Brief for designer notes.
- Toolbar: Excel download, Regenerate (reopen brief), New Brief, Previous Plans.

7. AI Reels

- Open the AI Reels tab!' describe the reel, length, platform, voice, CTA.
- Generate Reel Script!' review hook, scenes (visual / voiceover / on-screen text), c
- Save Reel to keep it under Saved Reels. History lists content plans and reels together.

8. Excel export

- Click + Excel. File includes Content Calendar + AI Reels sheets.
- Share with clients or designers without giving them dashboard access.

Quick checklist

- Org created!' team invited!' brand added!' Brand Memory saved.
- Brief pasted!' plan generated!' calendar reviewed!' Excel downloaded.
- Reel script generated/saved when the brief needs video.

Tip

Employees: after login, download the Employee User Manual from the dashboard for day-to-day prompts.