

First-Time Setup Checklist

Use this checklist to get the platform ready for your first book upload and content generation. Tick items as you go - you only need to do most of this once.

Before you start

Have these ready: your book file (DOC/PDF/EPUB), your Amazon book listing URL, and the logins for any social platforms you want to connect.

- Decide your first pen name (one pen name per niche is recommended).
- Optional but recommended: an author bio and a profile image for the pen name.
- If connecting Instagram (and some other Meta platforms), ensure your account is a professional/business account so API connections are allowed.
- Choose which AI you will use: OpenAI or Claude (you will need an API key).

1) Create your first Author (pen name)

- Go to the dashboard and select Create Author.
- Enter your pen name.
- Add a biography (optional but recommended).
- Select the main genre for this pen name.
- Define the target audience.
- Upload a profile image (optional but recommended).
- Click Create Author and confirm it appears in your Author list.

Tip: Keep each pen name focused on one niche/genre for cleaner marketing and content.

2) Add your AI API key (OpenAI or Claude)

- Go to Setup (connections / integrations).
- Choose Claude or OpenAI (whichever you plan to use).
- Follow the prompt/link to get your API key from the provider's console.
- Paste the API key into the platform and save/connect.
- Confirm the AI connector shows as connected.

3) Connect your social accounts (as available in your plan)

- In Setup, click Connect for each platform you want (e.g., Facebook, Instagram, Pinterest, LinkedIn, Threads, BlueSky).
- When redirected, log in and authorize the app access.
- Repeat until every desired connector shows as connected.
- For Instagram: confirm the account is professional/business before attempting to connect.

4) (Optional) Connect WordPress for blog articles

- In Setup, find the WordPress connector and open the instructions.
- In WordPress: go to Users -> Profile.
- Scroll to Application Passwords and create a new one (e.g., 'AI Sales Rocket').
- Copy the generated application password (you will only see it once).
- Back in the platform: enter blog name, username, and the application password.
- Click Connect WordPress and confirm it shows as connected.

5) Upload your first book

- Go to Start -> Upload Book.
- Upload your book file (DOC, PDF, or EPUB).
- Confirm file size is under the platform limit (stated as 50 MB max).
- Select the Author (or create one from here if you skipped earlier).
- Enter the Book Title.
- Paste the Book Description.
- Select the Genre and Target Audience.
- Paste the Amazon link to the book listing (copy from your Amazon product page).
- Click Upload Book and confirm it appears in your book list.

6) Generate your first promo content (bulk)

- Go to the Content tab.
- Choose Bulk Generate (if included in your plan).
- Select the Book you want to promote.
- Select the content types you want (articles/blog, Instagram, Pinterest, Facebook, LinkedIn, Threads, BlueSky).
- Choose quantity per type (1-10).
- Pick a tone (e.g., professional, casual, enthusiastic, mysterious).
- Pick a background style (if generating images).
- Review the estimated API cost shown before generating.
- Enable Generate images if you need visuals (especially Instagram/Pinterest).
- Click Generate All and confirm new items appear in your content list.

7) Post / publish content

- Open a generated content item from the list.
- Click Post Now (or your platform's publish option).
- Select which connected platform(s) to post to.
- If prompted to connect WordPress/Substack, complete the missing connection and retry.
- Confirm the post publishes successfully on the target platform(s).

8) Know where to get help

- Open the Help section at the bottom of the app.
- Use the step-by-step guides for: uploading books, connecting platforms, and troubleshooting connection issues.
- If a connector fails: re-check account type (e.g., Instagram business), re-authorize, and confirm you are logged into the correct account.

You're done. Once your AI key and connectors are set, your ongoing loop is: Upload Book -> Generate Content -> Post -> repeat.