PostingPilot Quick Start Guide

From sign-up to your first scheduled post in about 15 minutes

Version 1.5 · postingpilot.app/docs

This guide walks through the shortest path to a published post. For a full reference of every feature, see the User Manual.

Contents

Before you start

You need two things to publish: a PostingPilot account and a connected social channel. Everything else - topics, drafts, images, video - is generated inside PostingPilot.

- A PostingPilot account (free trial includes a limited number of AI generations per day and per month).
- At least one social channel you can connect: LinkedIn, Facebook Page, Instagram Business, YouTube, X (Twitter), Threads or TikTok.
- The credentials for that platform (Meta access token and Page/Instagram account ID, YouTube OAuth, X OAuth token, Threads token, or TikTok OAuth) - the Channel credentials guide at /docs/credentials has step-by-step setup for each.
- Three to five samples of your own writing, for the voice profile.

Tip: The fastest path is the guided setup wizard: open Setup wizard in the app and it takes you from a new channel to a scheduled post in four steps.

Tip: Not ready to connect anything yet? Create the demo workspace from the workspace switcher to explore a fully populated example with sample posts, topics and analytics.

Step 1 - Create your account and workspace

1. Sign up with email and password or Google, then confirm your email address.
2. You land on the dashboard with a default workspace already created.
3. If you manage more than one brand or client, use the workspace switcher in the top bar to add a workspace per client. Topics, voice, brand kit, channels, credentials and analytics are isolated per workspace.
4. Open Setup wizard from the nav or the onboarding banner to run the guided flow.

Tip: Take the guided tour the first time it appears - it points out the workspace switcher, planner and setup checklist in under a minute.

Step 2 - Connect a channel and check its health

1. In step 1 of the setup wizard (or on the Channels page), add a channel: give it a name, pick the platform and optionally a handle.
2. Store that platform's credentials for the workspace in Settings, and add the account ID where the platform needs one (Facebook Page ID, Instagram Business account ID).
3. Check the connection health panel in the wizard. Each channel shows Ready, or exactly what is missing - no token, missing account ID, expired token or key rotation needed.
4. Press Recheck after fixing anything, and use Test connection on Meta, YouTube and X channels to confirm the account details PostingPilot can see.

5. Mark the channel active so it becomes available when scheduling posts.

A channel only publishes when it shows Ready. Channels on platforms without direct publishing show Manual export instead - you copy the formatted text and post it yourself.

Step 3 - Train your writing voice

1. Go to Voice and start the setup wizard.
2. Paste 3-5 posts you have written. Longer, more typical samples work better than your single best post.
3. Choose traits: formality, humour, emoji use, sentence length, preferred hooks and CTAs.
4. Add banned words or phrases you never want the AI to use.
5. Use the Test drive step: type a topic and compare the generic draft against your voice-matched draft. Adjust traits until it sounds like you, then save.

> Tip: Every save creates a version. If a new batch of samples makes drafts worse, revert from version history.

Step 4 - Generate topics

1. Open Topics and describe your niche, audience and goals.
2. Generate a batch of ideas, then keep the ones worth writing and discard the rest.
3. Optionally add ideas from the Idea Inbox by importing a blog URL or RSS feed - near-duplicates are merged automatically.

Step 5 - Write your first post

1. From a saved topic, click Write. The draft is generated in your voice. (The setup wizard does this for you in step 3.)
2. Try alternate hooks, AI caption variants and per-platform variants to see which opening lands best.
3. Attach media: generate an AI image, build a branded carousel or render a short video clip. Instagram posts need an image and YouTube posts need a video file.
4. Check the pre-publish score for hook strength, clarity and call to action, and the destination badge for which channel receives this post type.

Step 6 - Preview, schedule and publish

1. Open the Planner. Empty slots in your cadence are highlighted as gaps.
2. Drag your draft into a slot, or let the planner fill remaining gaps with suggested drafts.

3. Select the exact channels for each card, adjust the time inline, and use undo/redo if you misdrop a card.
4. Open the preview to check the caption per channel and satisfy platform requirements (Instagram image, X character limit, YouTube privacy, category, tags and thumbnail).
5. Click Schedule. Each card shows scheduled, sent or failed with a timestamp.
6. Open View delivery details on any sent card to see the raw delivery payload and error history.

> Tip: Failed publishes move to the Retries queue and re-attempt automatically with backoff - you do not need to re-create the post. You can also retry one channel from its notification.

Step 7 - Watch what happens next

- Dashboard: drafts, scheduled this week, published in the last 30 days and failures at a glance.
- Notifications: live batch outcomes and platform API errors, filterable by channel and date.
- Insights: reach, engagement, best-time-to-post heatmaps, hashtag performance and per-channel publishing status.
- Delivery history: every delivery attempt with a link to the affected post, plus success-rate trends.
- Engagement: likes, shares, saves and comments per post and platform, with a freshness panel showing when each platform last synced.
- Usage: AI generations by feature and estimated spend against your plan.

Once the first post is live, the setup checklist on the dashboard should be fully complete. From there, work weekly: refill topics, let the planner close gaps, approve, schedule.

Step 8 - Bring in clients and teammates

1. Open Members and invite people by email with a role: owner, editor or viewer. They do not need an existing account.
2. For review-only clients, create a client portal link instead - they can approve or reject posts without signing up, and are reminded automatically if a post sits waiting.
3. Set up a scheduled client report so performance summaries go out on a cadence, branded with your own name and logo on the Agency plan.
4. Agencies on-billing clients can use the client billing rollup to export posts, drafts, videos and cost per workspace with a markup applied.

> Tip: Seats are limited by plan (Solo 1, Studio 3, Agency 10). If you need more, add seat add-ons from the billing page rather than changing plan.

Version history

v1.5 · 2026-08-25

- Added the in-app credentials wizard: guided per-network setup with required-field checks and a live connection test.
- Added a unified Test connection action covering LinkedIn, Facebook, Instagram, Threads, YouTube, X and TikTok.
- Added a printable channel credentials PDF with a per-network setup checklist.
- Added the troubleshooting guide mapping common connection and publishing errors to exact setup fixes.

v1.4 · 2026-08-25

- Added the Channel credentials guide: step-by-step app, token and scope setup for LinkedIn, Facebook, Instagram, Threads, YouTube, X and TikTok.
- Documented credential storage, encryption, rotation and connection troubleshooting.

v1.3 · 2026-08-19

- Added TikTok and Threads publishing, plus the public status page for all seven channels.
- Documented the engagement dashboard, metrics freshness, historical snapshots and account-level metrics.
- Added campaigns and content mix, A/B experiments, UTM links and conversion attribution.
- Added bulk CSV import/export, the demo workspace and email invites for clients.
- Documented agency operations: white-label, client billing rollup, audit retention and export attestation.
- Added seat add-ons, trial limit nudges, account deletion and data export, and the Ask Pilot help assistant.

v1.2 · 2026-08-17

- Documented the guided setup wizard and its channel connection health panel.
- Added Facebook, Instagram, YouTube and X (Twitter) direct publishing, including media and token requirements.
- Added sections for the notifications centre, team members and roles, and bulk scheduling.
- Documented the pattern library, trend radar and pre-publish scoring.

v1.1 · 2026-07-30

- Added in-page search, printable PDF editions and a feedback widget.

- Expanded the troubleshooting section with retry-queue and usage-limit guidance.

v1.0 · 2026-07-29

- First published edition of the User Manual and Quick Start Guide.