Getting Started

If you are new to Evergage, follow the steps below to get started. The linked articles will guide you through each step of the process. If you need additional guidance on the Evergage setup process, please to reach out to our Support team or to your Customer Success contact.

This Article Explains

These are the steps you will work with Customer Success to complete:

1. **Set Up | Create your account** – your Customer Success contact will help you with this step
2. **Set Up | Log into your account** – once you have created your account, use the credentials automatically emailed to you to log in for the first time
3. **Set Up | Get an overview of the Evergage platform** – learn how to get around and find what you need before you begin
4. **Set Up | Create user accounts** – create accounts for the members of your team who will use Evergage
5. **Set Up | Connect with Customer Success** – once you have completed the setup process, check in with your Customer Success contact to begin the training process
6. **Data & Identity | Determine which third party integrations you need** – Evergage can integrate with your other systems
7. **Data & Identity | Prioritize integrations and begin the Evergage ETL process** – Evergage will work with you to configure data feeds using our ETL system
8. **Digital | Determine whether you will install Evergage on multiple sites** – if you need to use Evergage on multiple sites, please discuss with your Customer Success contact before proceeding
9. **Digital | Install the JavaScript Beacon** – after installation, please contact Customer Success so they can validate your setup and begin the integration process
10. **Digital | Install the Visual Editor** – this Chrome extension will makes it easy to add personalization features to your website

Articles in this Section

- Navigating Evergage
- Glossary