**Pendo User Guide**

FOR

**Beginners**

A blue monogram with swirls

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Version 1.0

2024 August 22

**Revision History**

The table below identifies all changes that have been incorporated into this document.

| Version | Draft Date | Summary of Change | Point of Contact |
| --- | --- | --- | --- |
| 1.0 | 8/22/2024 | Initial | Neithdos |
|  |  |  |  |
|  |  |  |  |

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# Introduction

This user guide is for beginners using the Pendo product for the first time. In this guide, we will create a welcome message.

# Steps

1. Type <https://www.pendo.io> in the web address bar.
   1. Note: For the best results, you should use Google Chrome.

Graphical user interface, website

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Figure 1: Pendo Welcome Page

1. Click **Log in** on the toolbar.

Graphical user interface, website

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Figure 2: Pendo Log In button

1. Enter the email address associated with the account.

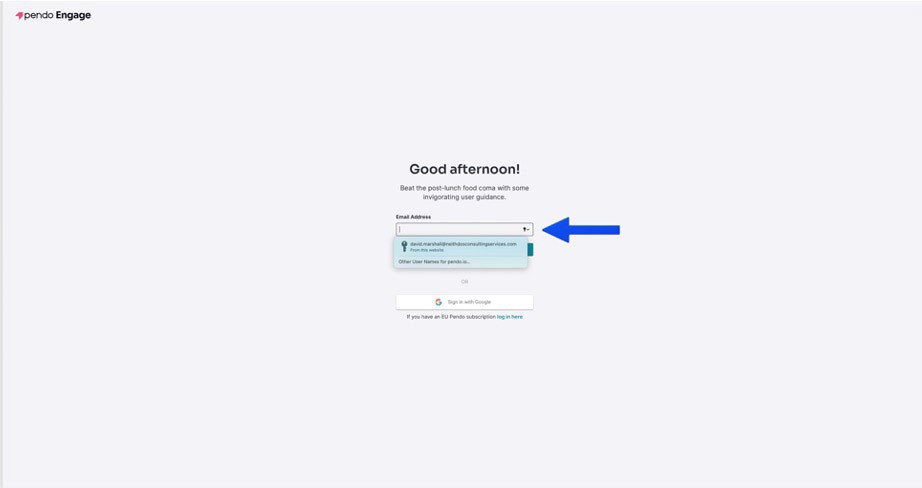


Figure 3: Enter email address

1. Click **Sign In**.

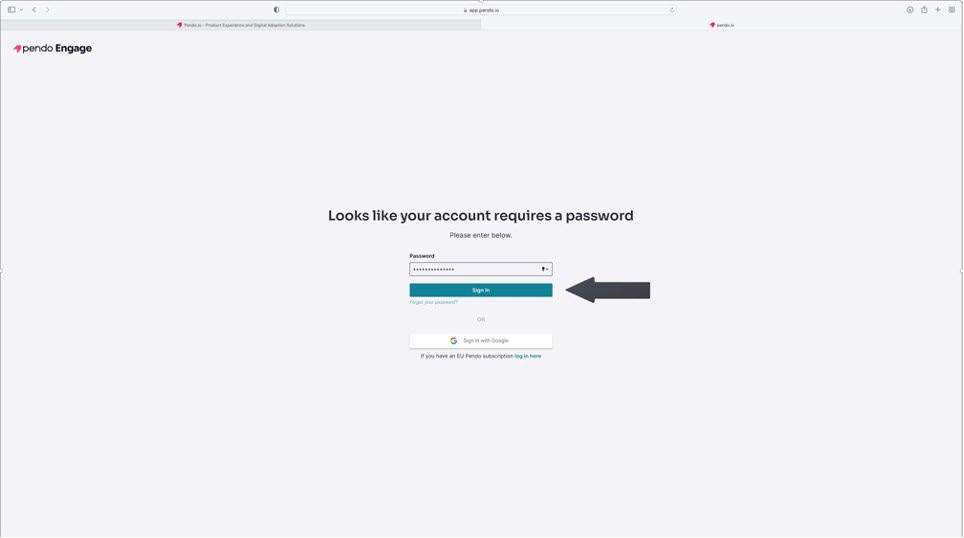


Figure 4: Sign In button

1. Enter the account password.

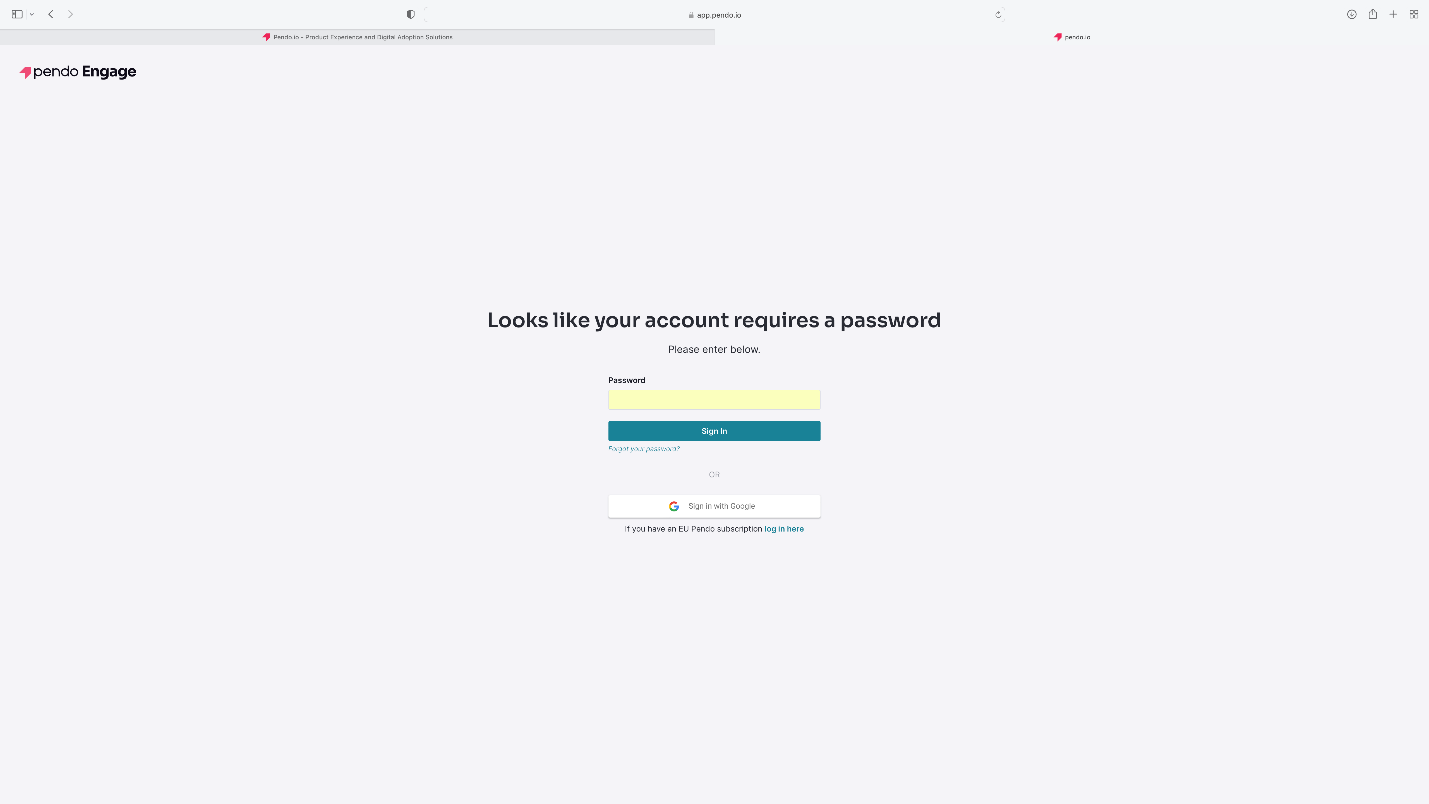


Figure 5: Password page

1. Click **Sign In**.

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Figure 6: Sign In button

1. The Pendo Dashboard displays

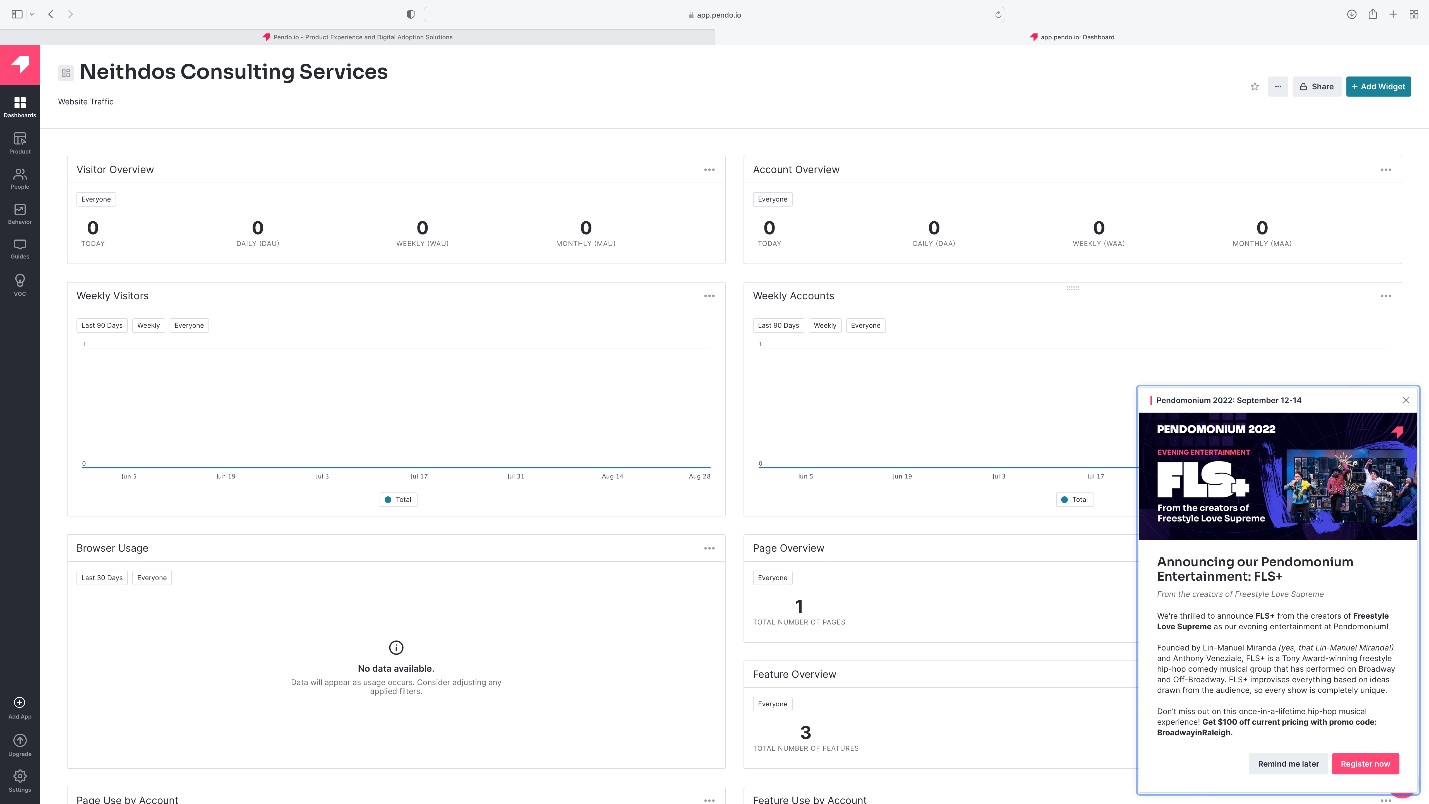


Figure 7: Pendo dashboard

1. To view the announcements, click on the Pendo logo on the lower right-hand corner of the dashboard. The Resource Center opens, displaying the notifications. To exit the Resource Center, click “X” in the upper right corner.

Graphical user interface, application

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Figure 8: Pendo Resource Center

1. Click **Guides** in the toolbar on the left-hand side of the dashboard.

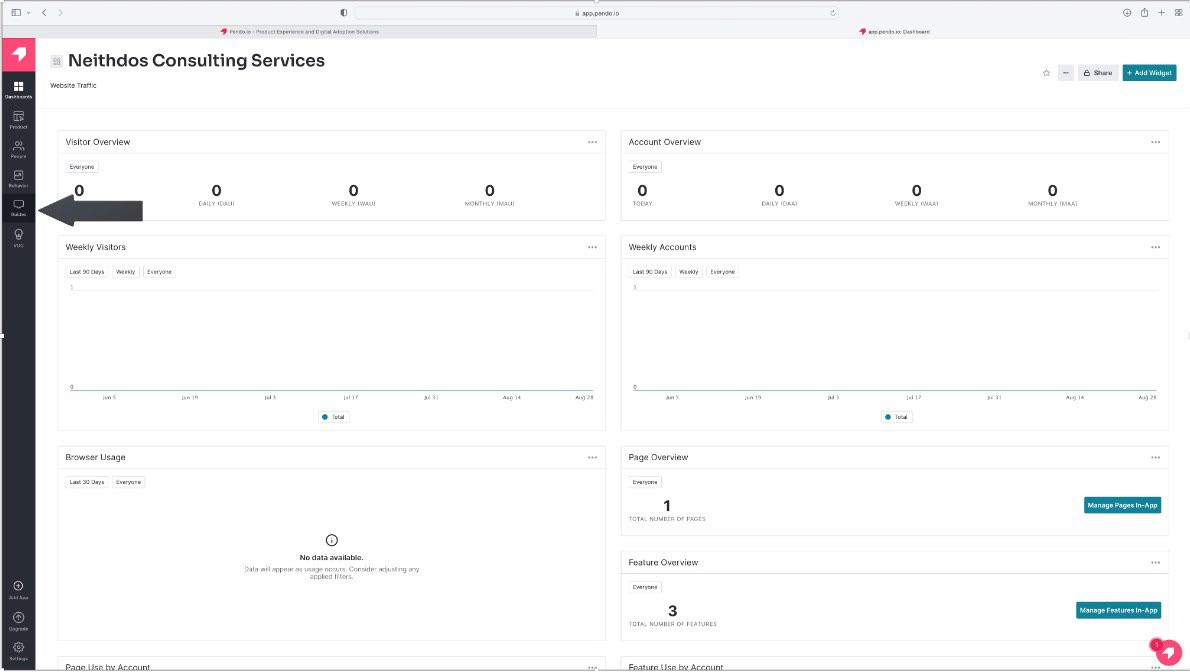


Figure 9: Guides option

1. Click Guides for the Guides menu—the Guide dashboard displays.

Graphical user interface, text, application, email

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Figure 10: Guides option from the Guide menu

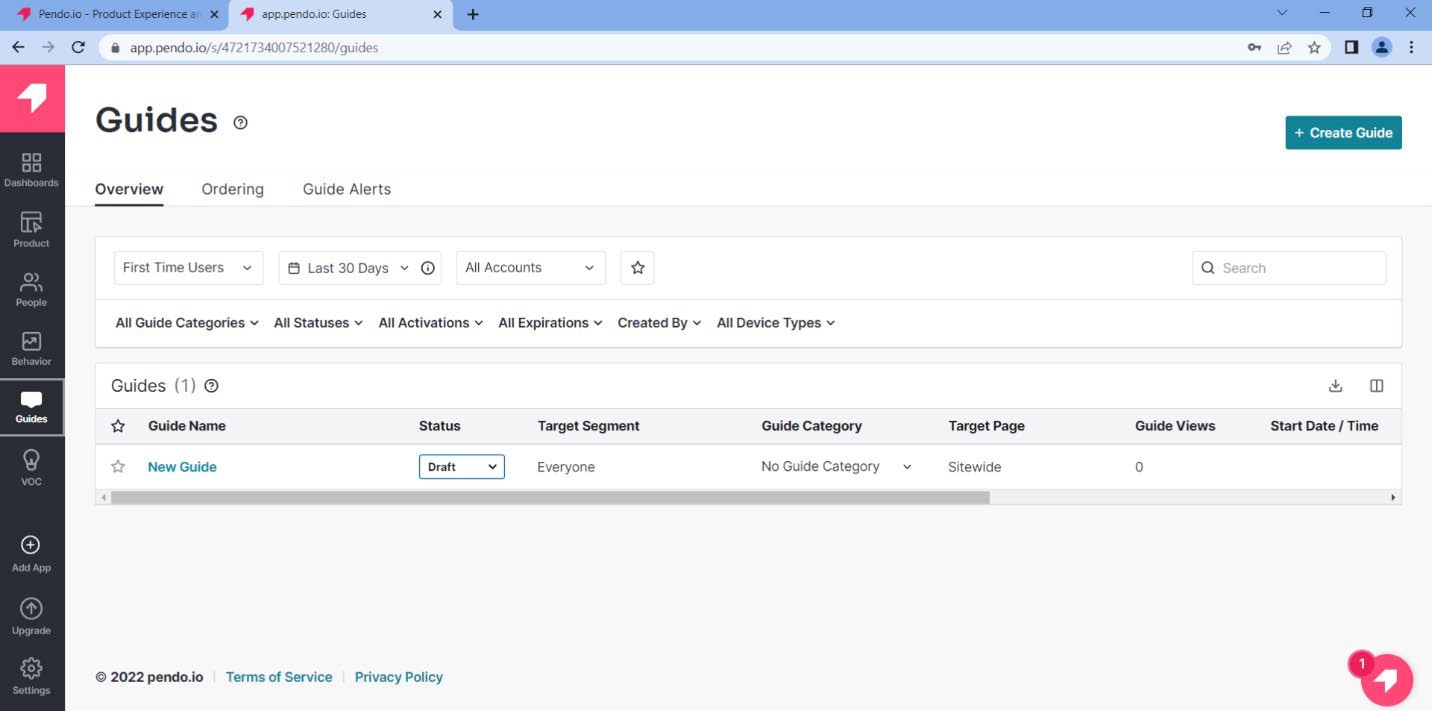


Figure 11: Guides dashboard

1. Click **+Create Guide**.

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Figure 12: +Create Guide button

1. Select *Default* from the Theme pull-down menu.

Graphical user interface, application, Word

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Figure 13: Theme pull-down menu

1. Select the guide's theme. For this guide, we will select “Lightbox: Start from Scratch.”

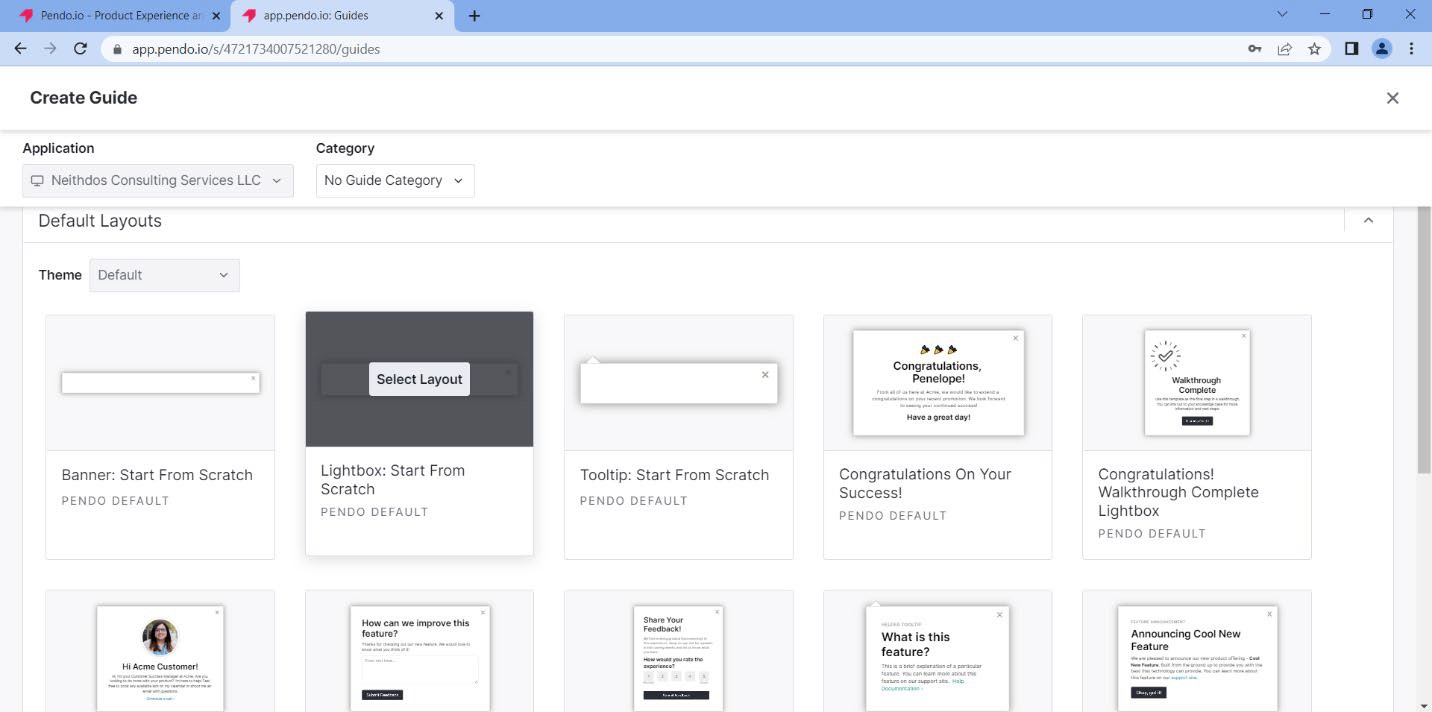


Figure 14: Selecting a theme

1. Click **Select Layout**.
2. Create a name for the guide in the blue highlighted area.

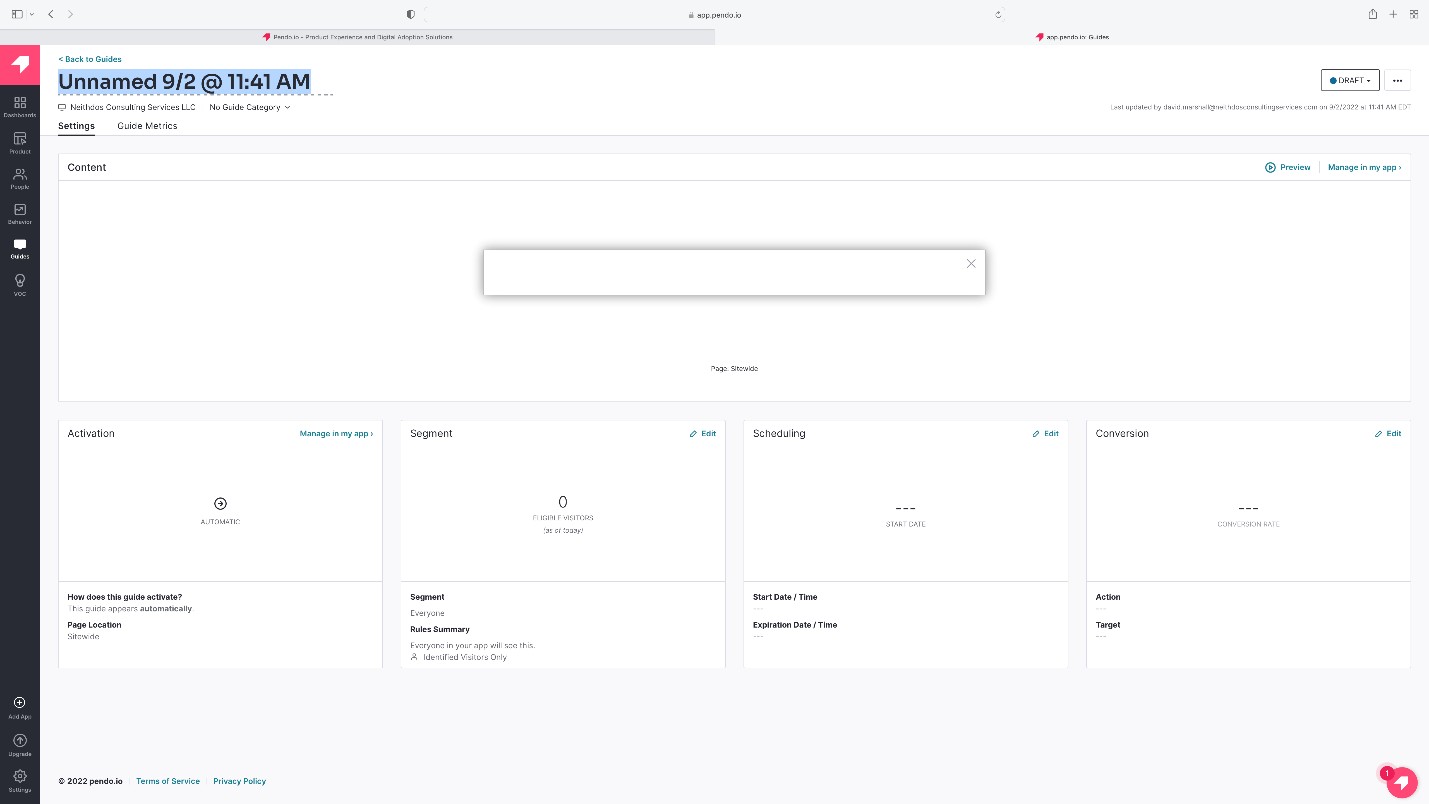


Figure 15: Create a name for the guide

1. In the Content area, type in the website URL where the customer’s name will be displayed. For this example, we will use <https://www.neithdosconsultingservices.com>

Graphical user interface, application, Word

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Figure 16: Enter URL

1. Click **Launch Designer**.

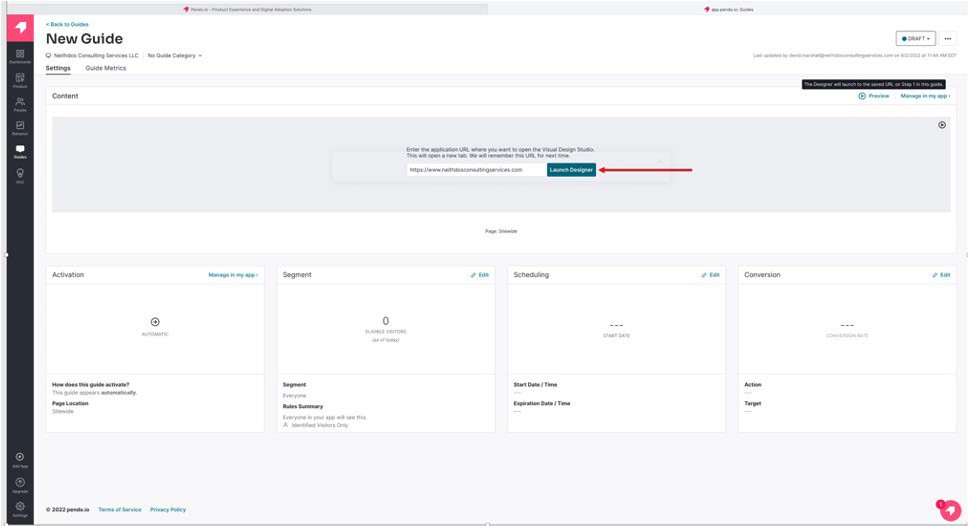


Figure 17: Launch Designer

1. Click **+Click to Add Content** on the Edit Container.

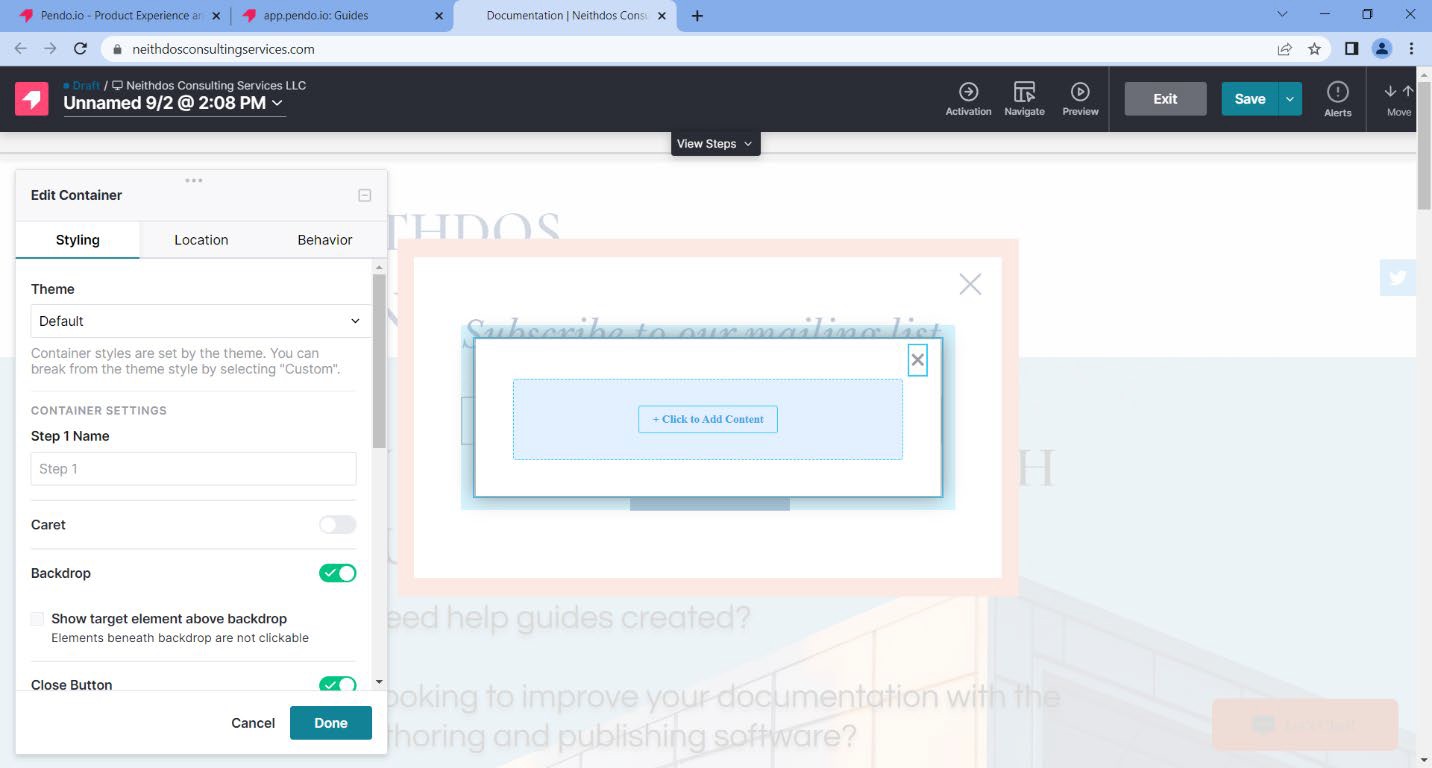


Figure 18: +Click to Add Content

1. Select Text under *Building Blocks*

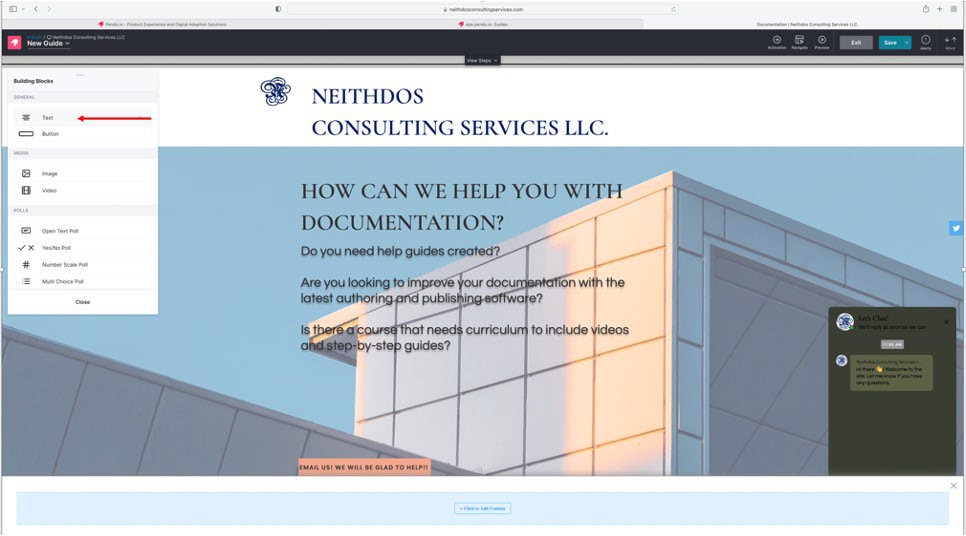


Figure 19: Text option

1. Select **Custom** under *Theme Style*.

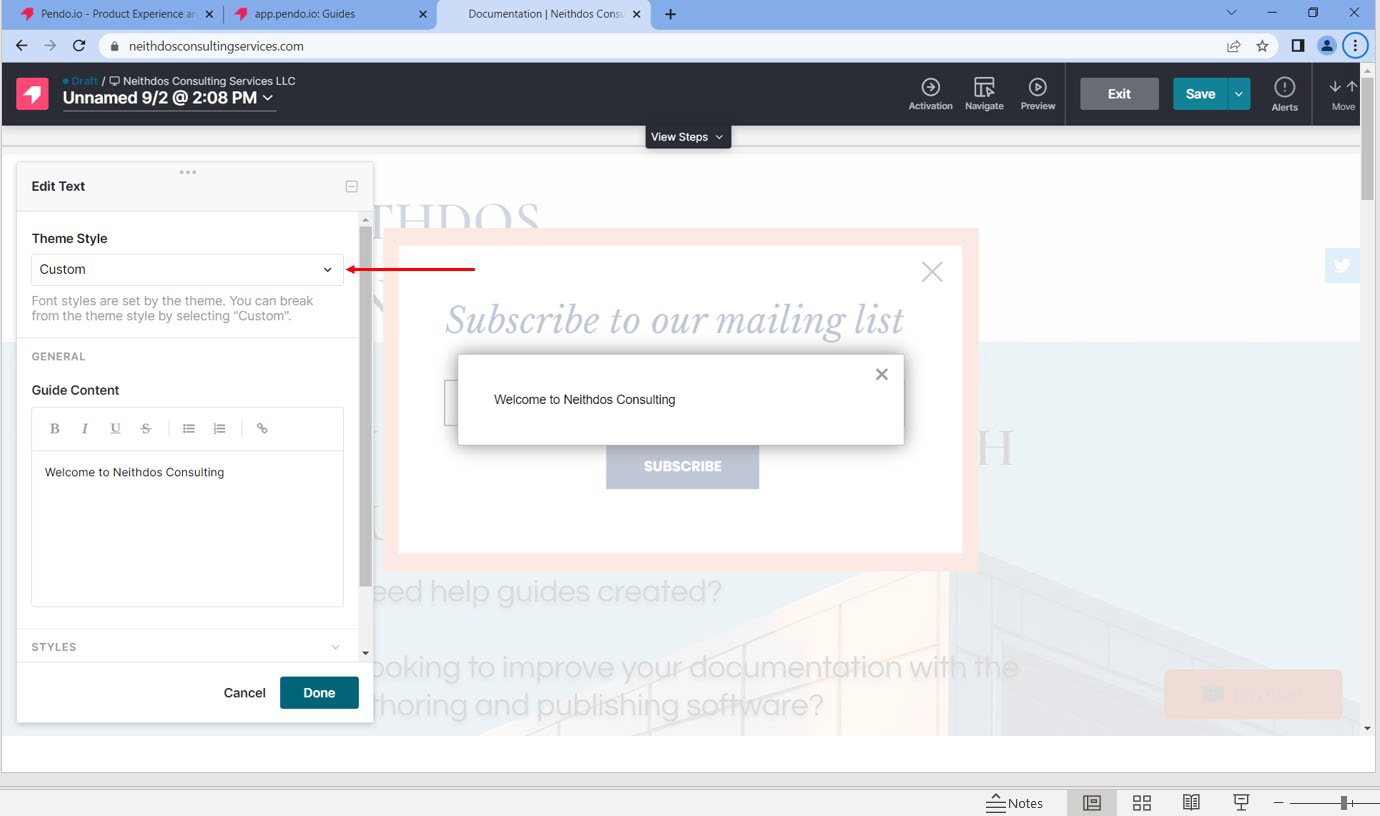


Figure 20: Custom option

1. Type the message in the Guide Content area. In this example, we will use “Welcome to Neithdos Consulting.:

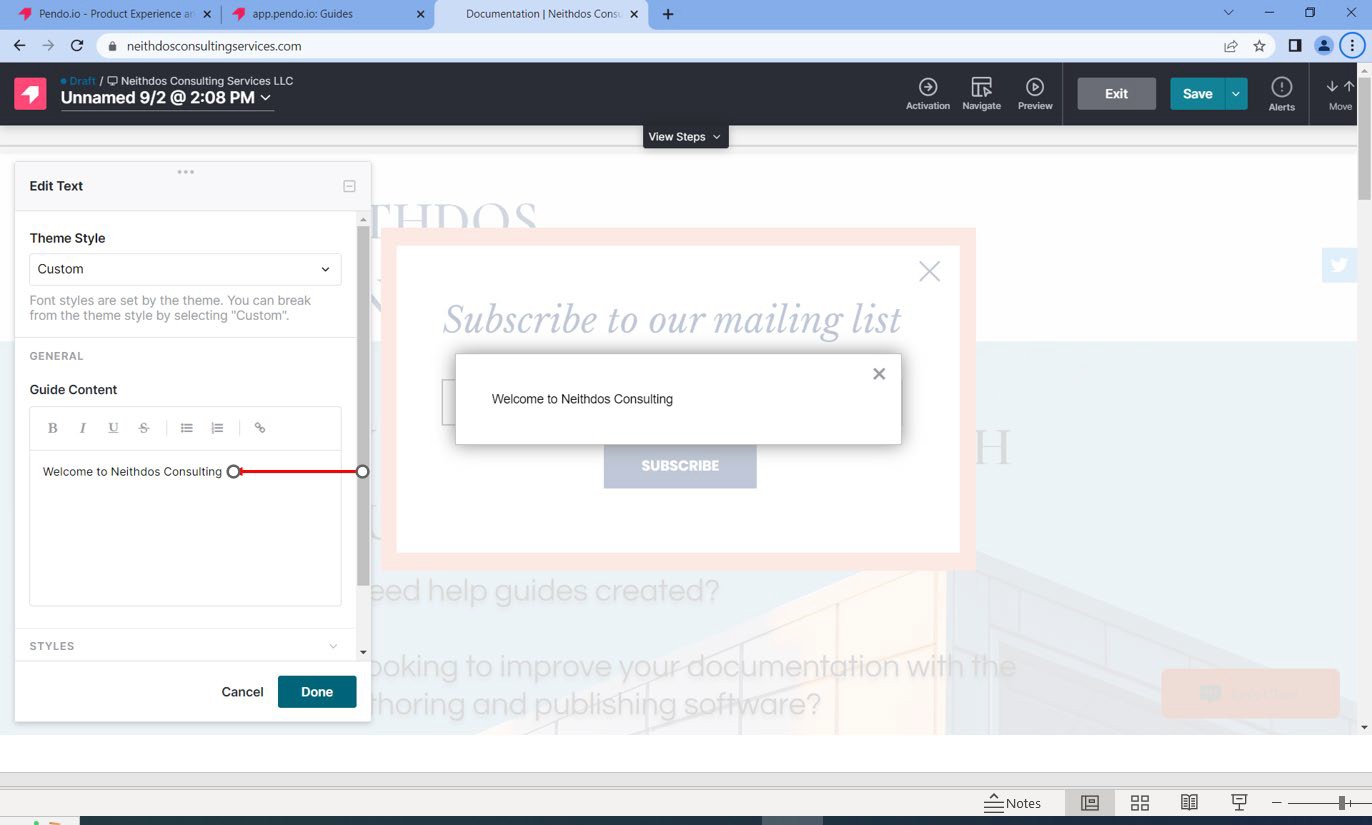


Figure 21: Customer Message

1. Click **Done**.
2. Click **Save** in the upper right corner.

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Figure 22: Save button

1. Click **Exit**.

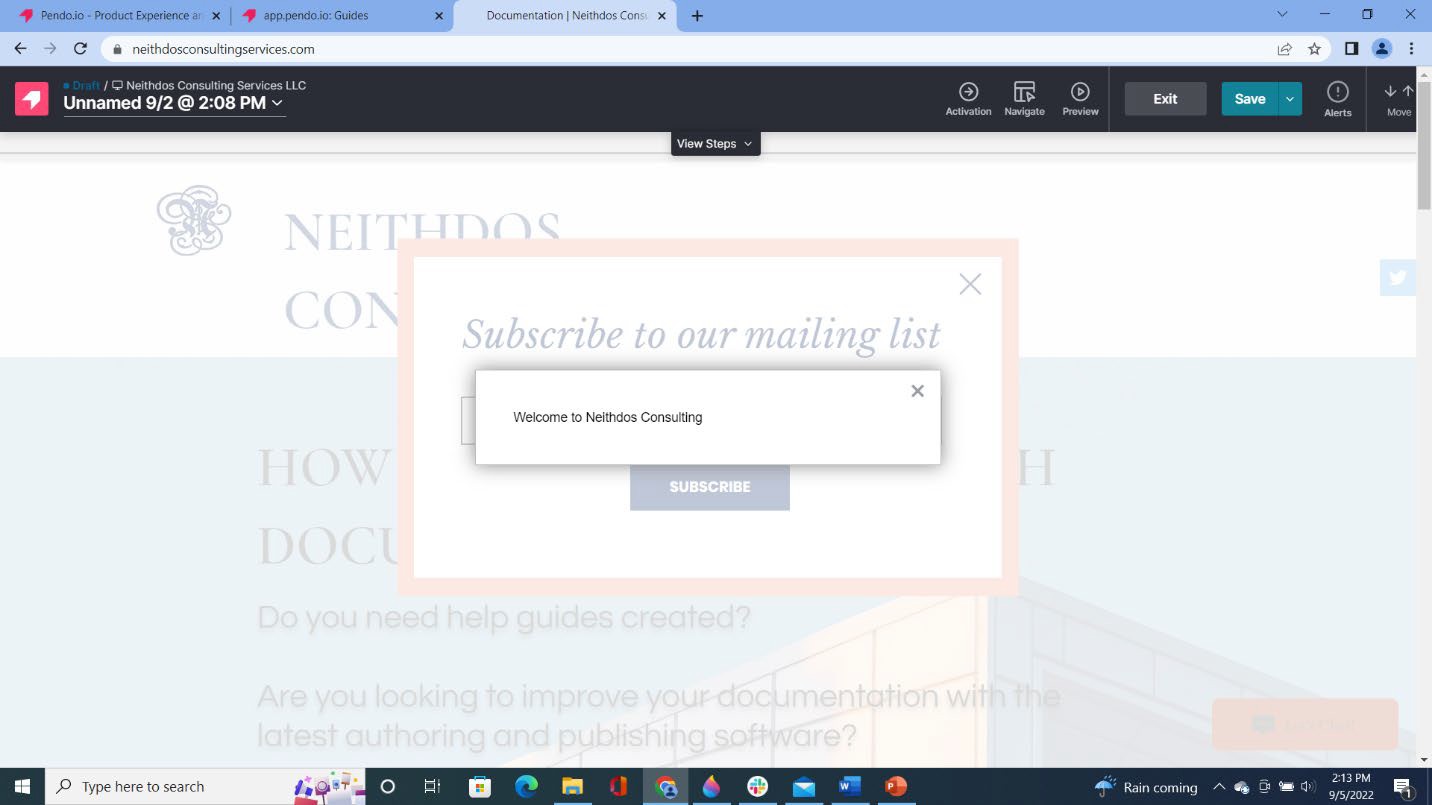


Figure 23: Exit button

1. Click **Preview**. The message appears on the website.

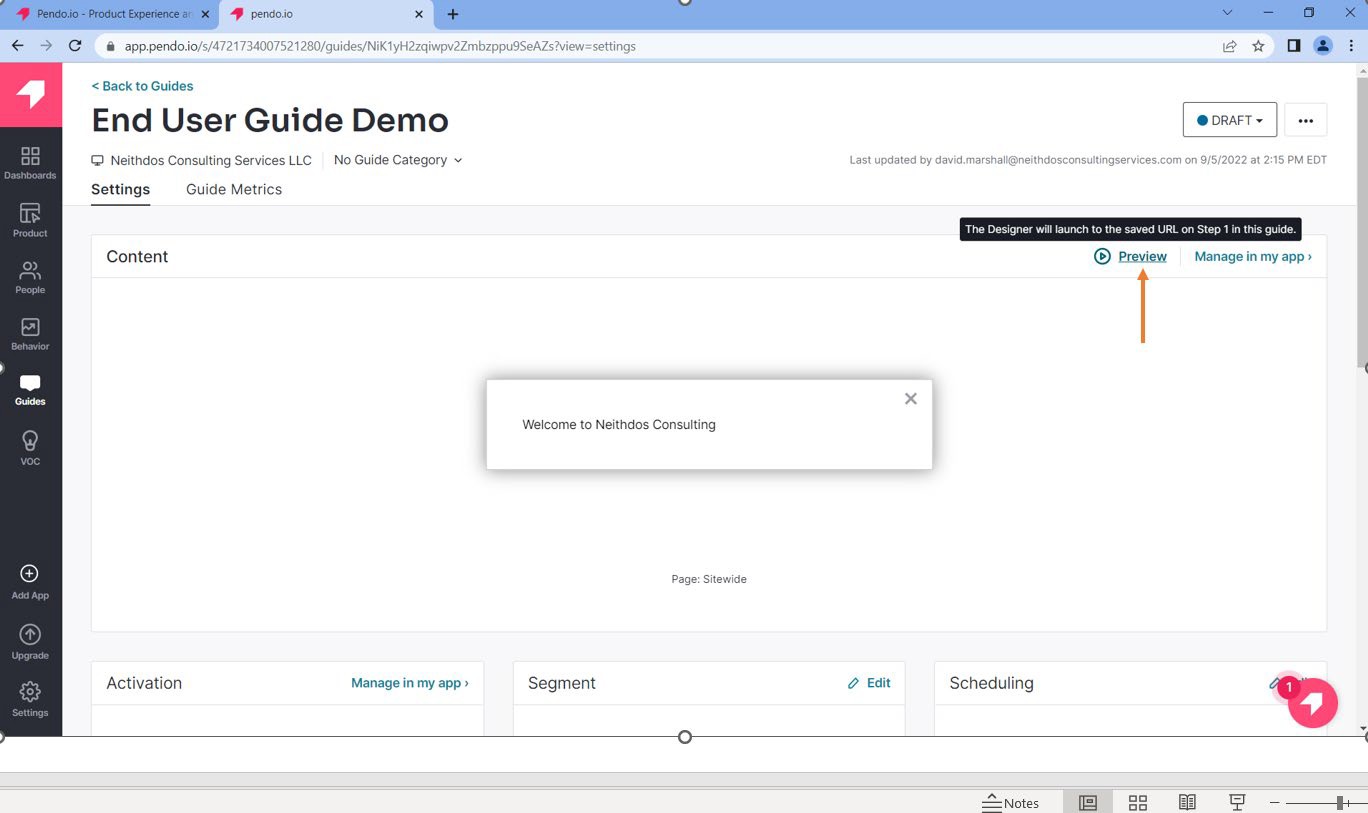


Figure 24: Preview option

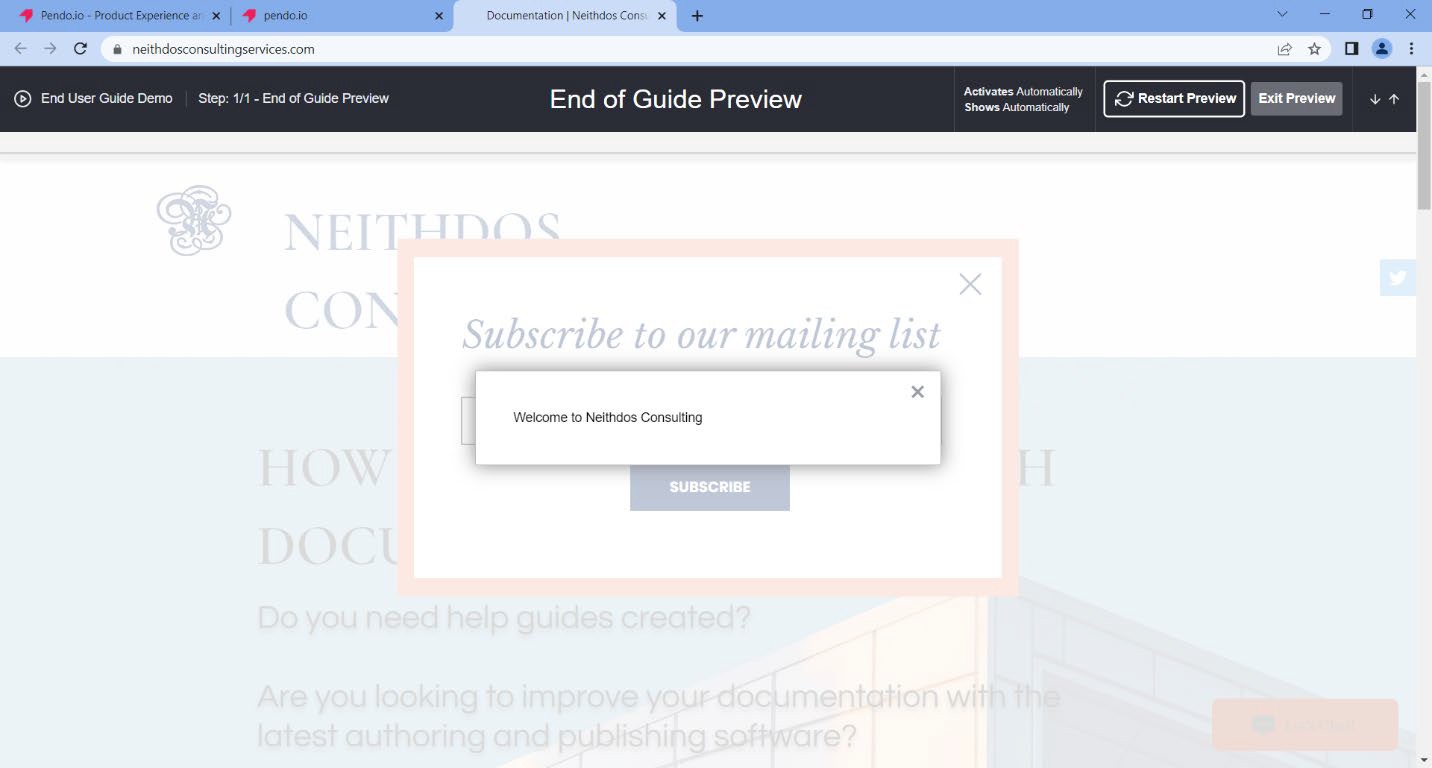


Figure 25: Website Message

1. Click **Exit Preview**.

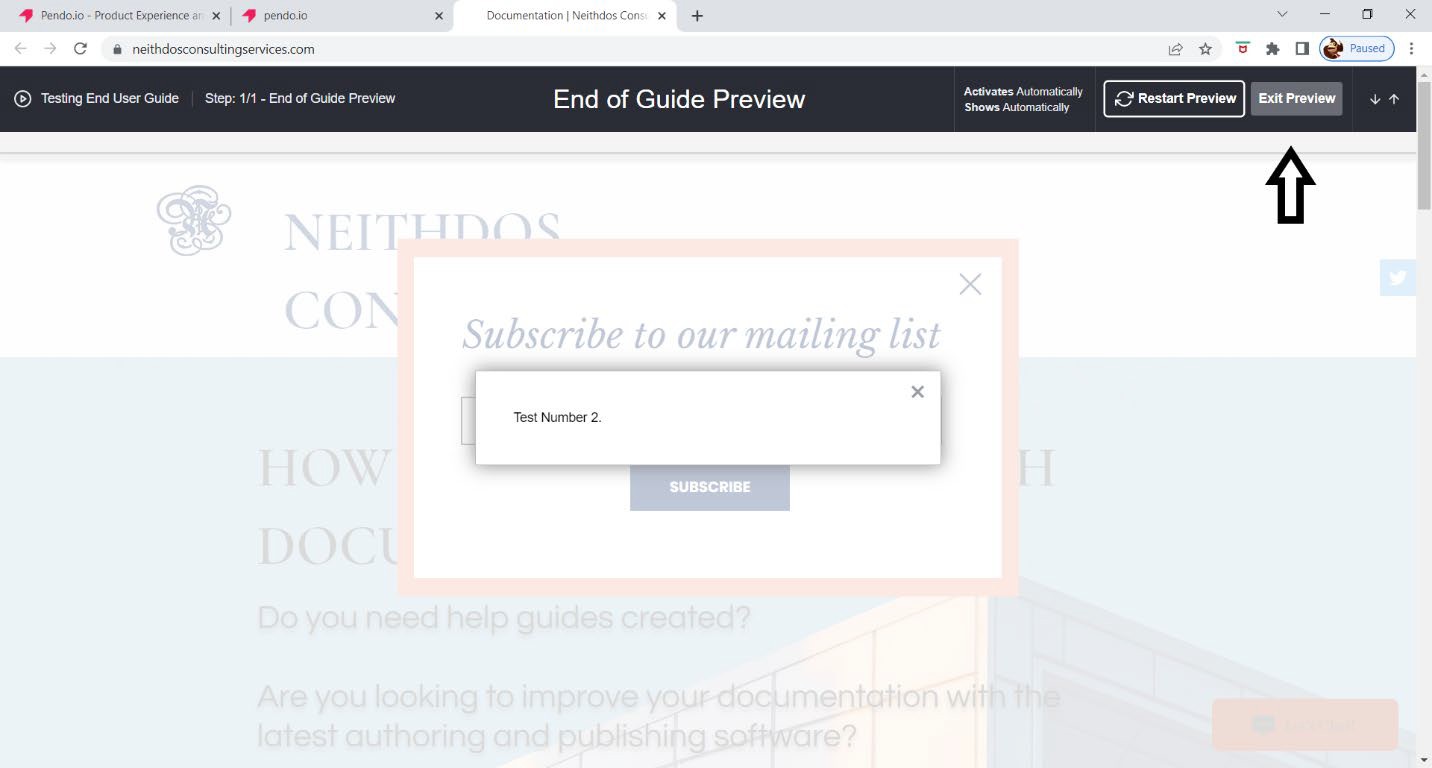


Figure 26: Exit Preview

1. Click **Back to Guides**. The newly created guide is listed in the *Guides Dashboard*.

Graphical user interface, application

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Figure 27: Back to Guides

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Figure 28: The newly created guide is listed