

# The Wistia Quickstart Guide



So you've signed up for a Wistia account. Welcome! Now what?

Our Quickstart guide is here to help you navigate your account set-up and get started on accomplishing tasks that will bring value to your business. This guide contains:

- A walkthrough of the crucial screens in your Wistia account
- Detailed instructions on the key tasks to help you get started

Have any questions while getting started that aren't answered here? Check out our documentation at [wistia.com/doc/](http://wistia.com/doc/).



Jeff, Customer Happiness Guy

# Main Screens Walkthrough

The best place to start would be with a quick introduction to the main screens you will be interacting with as you use your account. For each screen, we will give a brief overview of what functions you can accomplish there, and where you can find them. One important thing to note is that account owners, managers, and users all see different things on each screen in Wistia, based on the privileges they have been given.

## The Projects Page

The *Projects Page* is where you land each time you log into Wistia. From the Projects page, you can open an existing project, create a new project, or copy a project.



Projects work much like the folders on your computer. Inside, you can keep media like videos, PDFs, and MP3s. Projects can be shared, embedded as playlists, or just used to store media.

# Inside a Project

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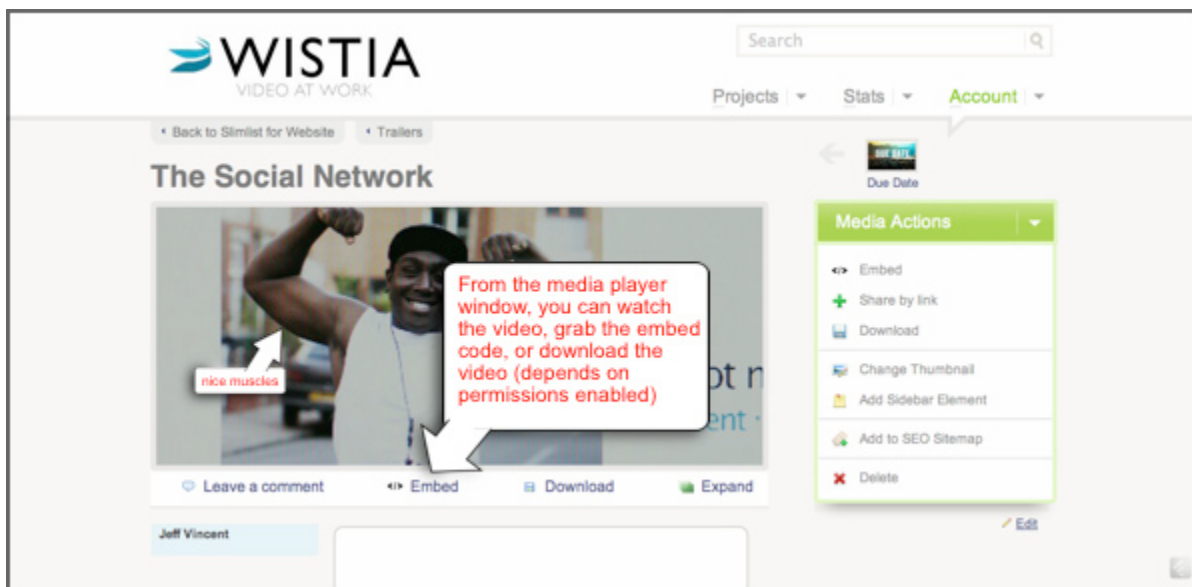
After creating/opening a project, you can edit the title, open the individual media inside the project, and leave comments.

From the project actions toolbar, you can do things like copy media, upload new videos, share the project, and embed the project playlist onto your own site.



# Inside the Media Viewer

From within the media viewer, you can watch the video, grab the embed code, or share access to the video directly by link.



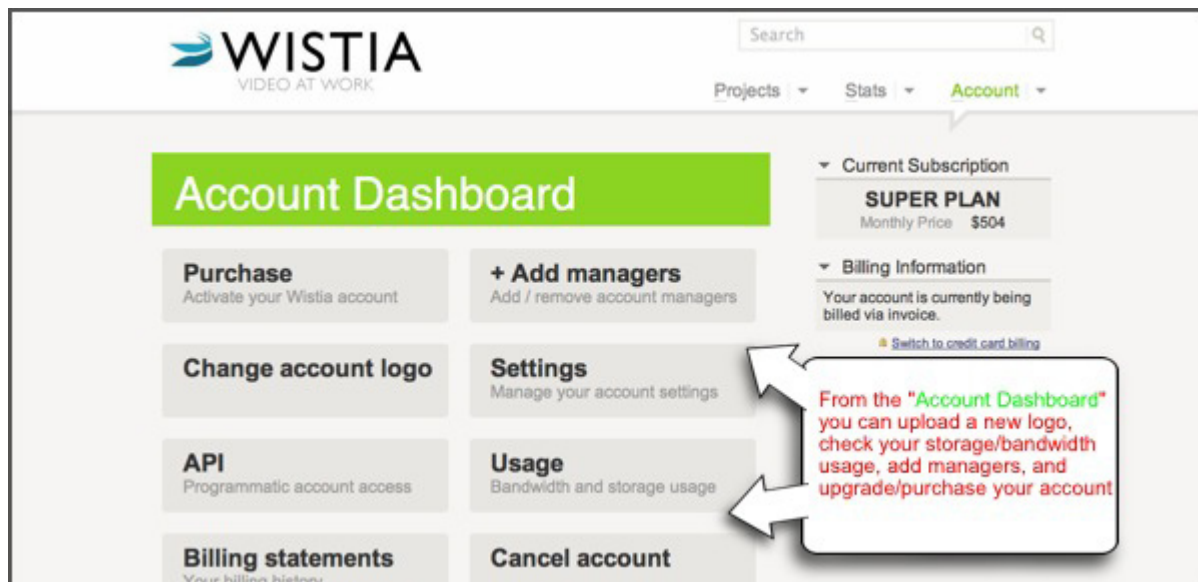
**TIP:** To browse through the different videos contained in a project, use the video browser, which is located above the 'Media Actions' drop-down.

# Inside Your Account Settings

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Inside the Account Settings page, you can check your monthly usage, add managers to your account, change your account logo, and update your payment information.

You can also purchase an account if you are currently trialing Wistia.



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The Projects Page, Project List, Media Viewer, and Account Settings pages are the main pages you need to know to get up-and-running with Wistia. Hopefully you now feel a little more comfortable with the account screens, and are now ready to move on to some tasks.

If you ever have any questions regarding your account, you can always get a hold of us by phone and email. Additionally, you can find information on all the topics above and more at the [Wistia docs](http://wistia.com/doc/).

# Early Tasks Guide

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Now that we're familiar with the main screens in Wistia, it is time to get down to business! While there are many ways to use Wistia, there are a few basic tasks that are good to know.

In this Section, we will cover:

- Changing your Account Logo
- Creating a Project
- Changing the Title of a Project
- Uploading Media to a Project
- Sharing a Project Privately by Email
- Embedding a Video in Your Website

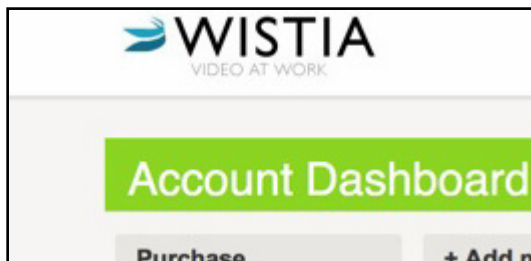
OK enough chatter...let's get started!



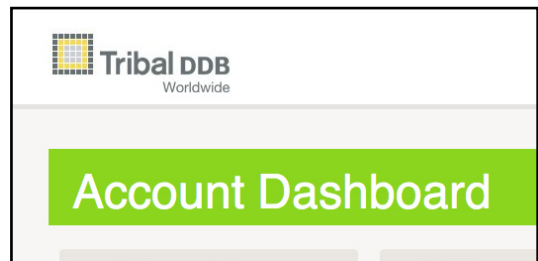
Adam, Marketing & Sales Ninja

# Customizing Your Account Logo

In this task, we will be updating the logo on your account from the standard Wistia logo to a custom image or logo of your choosing.



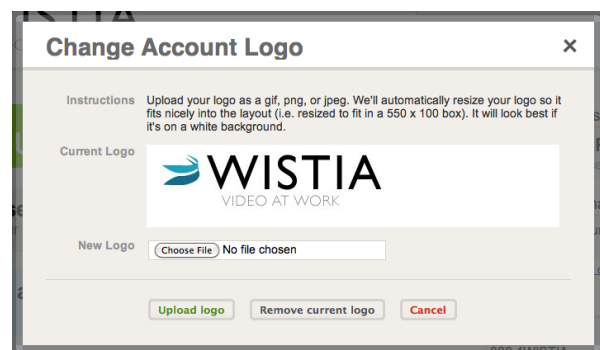
from this...



to this!

To upload your custom logo, choose the "Account Settings" option under the "Account" tab at the top of any page in your Wistia account. Then, choose the "Upload your logo" button.

When the dialog box appears, it will guide you through the process of uploading and displaying your company logo in your Wistia account.



# Creating a New Project

To create a new project, hover over the "Actions" menu on the "My Projects" page, and select "New Project". Once you click "New Project", you will immediately be taken into the new project where you can upload content, invite contacts, and edit the project name.

**TIP:** You must be logged in as a manager to create new projects!

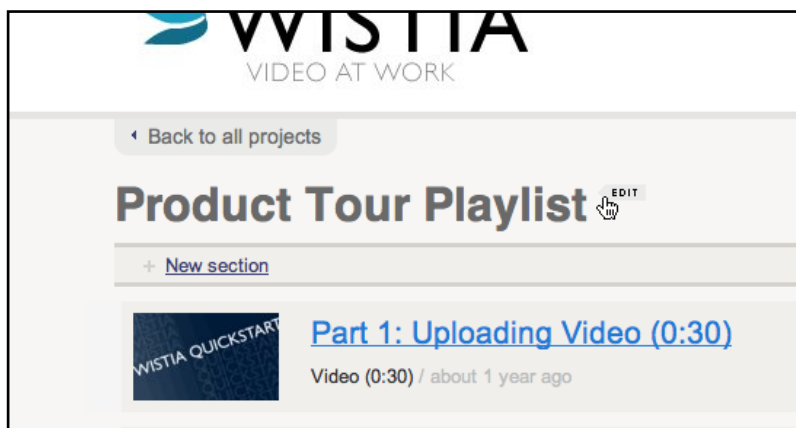


# Changing Your Project Title

Now that you've created a new Project, you can give it a proper title for easy tracking and searching.

Once you are inside the project, if you hover your mouse over the title of the project, you will see an "edit" indicator pop-up next to the title on the right.

Click anywhere on the project name and you will be in edit mode where you can make changes to the name. When finished, simply hit 'return' or click elsewhere on the page and your new project name will be saved.



# Adding New Media to a Project

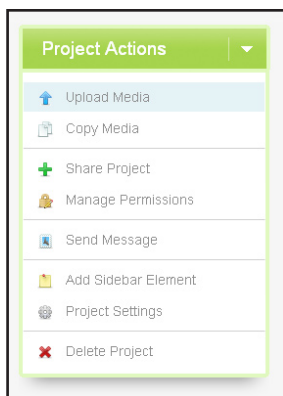
So we've got a fresh new project with a snazzy title. We need to get some videos in there!

To add new media, select "Upload Media" from under the "Project Actions" drop-down menu. A dialog box will pop-up, where you can select which files to upload from your computer.

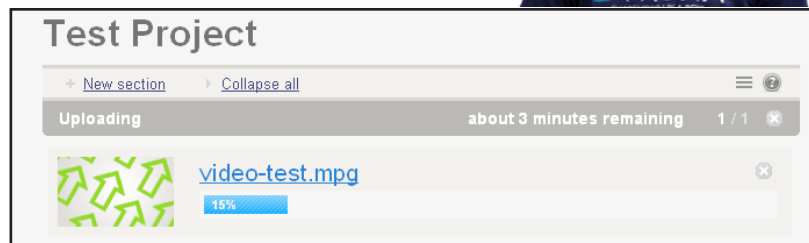
**Tip:** To upload multiple files, hold down the 'ctrl' (Windows) or 'shift' (Mac) button and select the files for upload.

Once a file(s) has been chosen, you will see the progress of the file uploaded (like to image to the right).

**Tip:** If you are having trouble uploading a file, try using our simple uploader.



Don't forget! If you ever run into problems, give us a call, 888-494-7842.

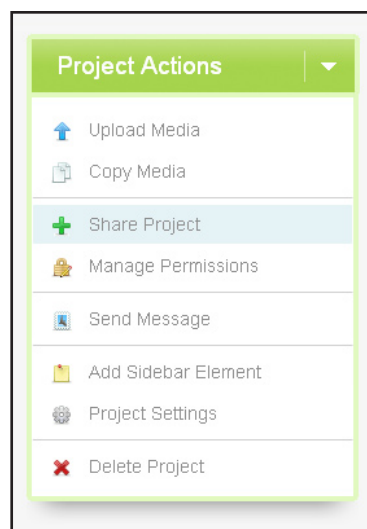


# Sharing a Project Privately by Email

We're cooking with fire now! The new project and media are looking great! Now, let's share them with a few select people. Since we want to control exactly who watches, we will use the "Share by Email" function.

From within the project, select "Share Project" under the 'Project Actions' drop-down menu.

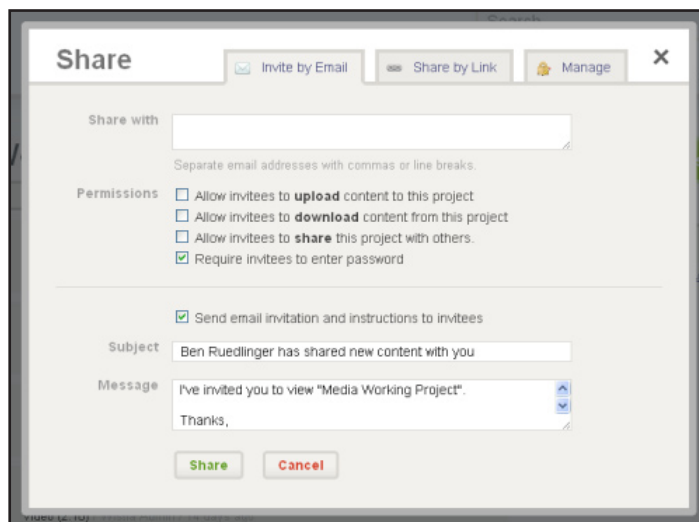
A Share window should pop-up, as seen below.



Enter the emails of the people you'd like to invite in the "Share with" box. Assign the permissions you'd like them to have for this project.

You can allow them to upload, download original files, or share with others. You can also choose whether the user needs a password to access the content.

Next, you can customize an email that will be sent to the people you are inviting. Once you click the "Share" button they will be sent the email, containing your personalized message as well as a customized link that will allow them to access your project.



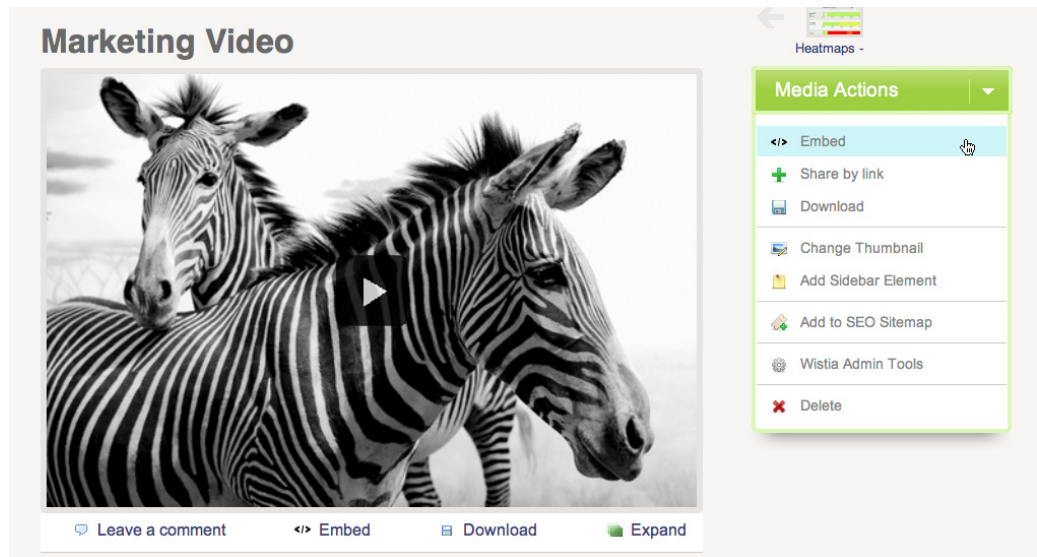
**Note:** When you share a project with a contact, they will only have access to that project, and will only see the controls you have given them. They will, however, see any sidebar elements and comments inside of the project and media. For more on that, check the Wistia docs or call us, 888-494-7842.

# Embedding a Video

In the last task, we shared the new project privately with a few select people. Now, we'd like to embed one of those videos onto our own website.

First, choose the video you would like to embed.

Once there, choose “</> Embed” from either under the video or from the ‘Media Actions’ drop-down menu.



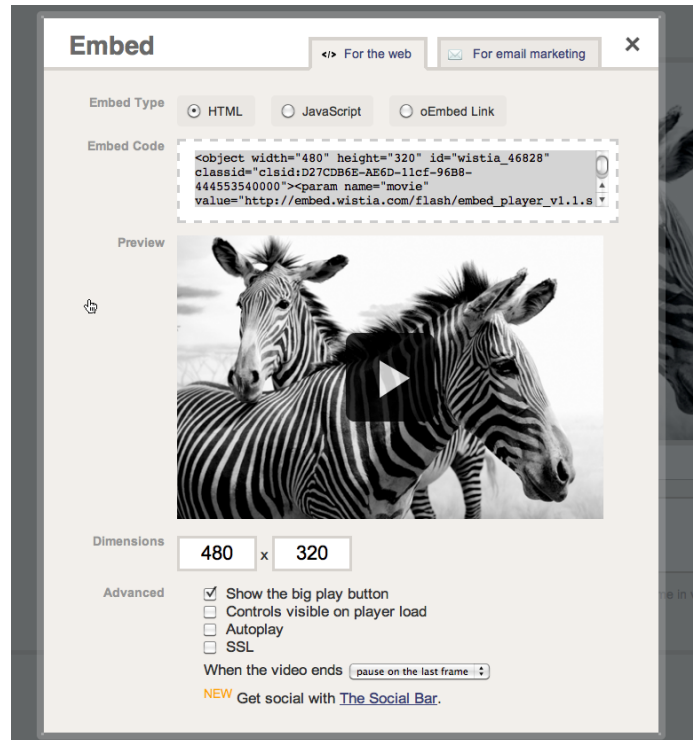
This will bring up a dialog which contains the embed code for this video. Changing either one of the dimensions will cause the other dimension to also be changed, maintaining your video's aspect ratio.

**Tip:** Wistia aspect ratios always need even numbers.

Once you have the video sized appropriately for your webpage and the appropriate options checked, click in the “Embed Code” box and copy all of the HTML code. This code can then be pasted directly into the HTML document of the webpage where you wish to embed the video.

Once you have pasted the embed code into the HTML document and saved it, reload the page in your web browser and the video should then display.

To view the statistics for your embedded video, select the “Embed tracking” option under the “Stats” tab at the top of any page in your Wistia account.

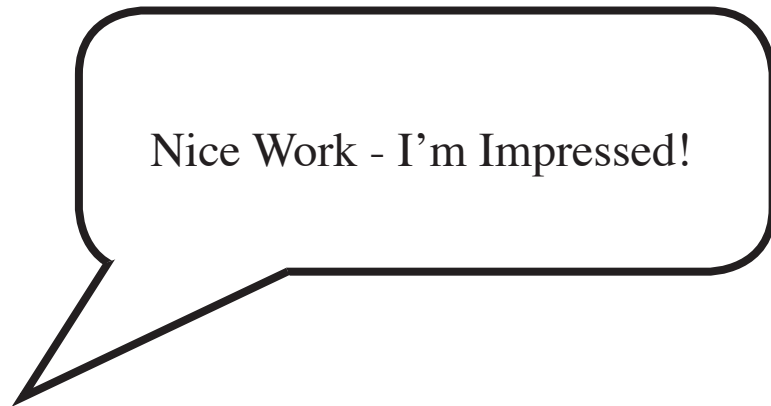




Congratulations! You've completed the Wistia Quickstart Guide! You've got the basics of your account covered, and now you're ready to share some great content.

If you have any confusion about any of the things we discussed, please give us a call, 888-494-7842. We're here to help!

Best Regards,  
-Team Wistia



Ben, Builder of Gears