Publish

User Guide

Reputation

2025

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1 | Publish Overview

Publish Overview

Manage all social media activities, across all locations, with ease and efficiency from a single platform.

The Publish function in the Reputation platform creates content that engages consumers, maintains interest, and drives meaningful interactions.

Audiences connect with their favorite brands, local stores, doctors, service providers, and more on social media. It is essential to establish a strong social media presence for locations and professionals.

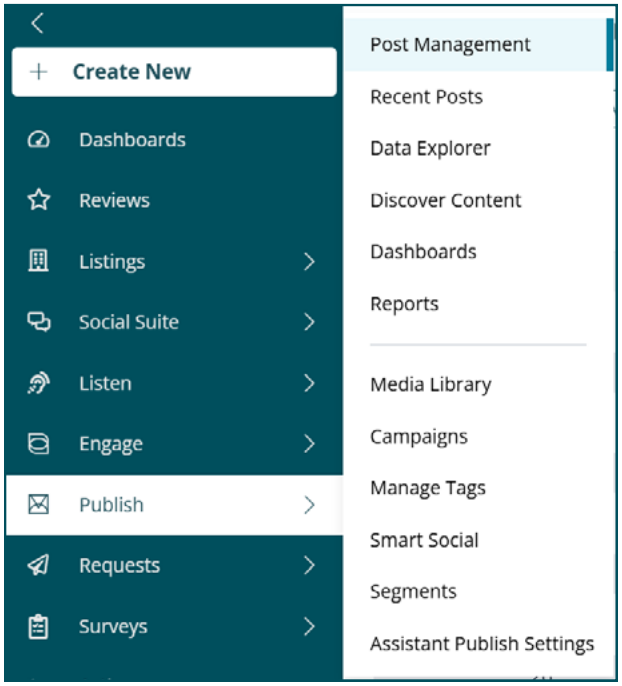
Publish Goals:

- **Engage Consumers**: Encourage actions like visiting your website, registering for events, or requesting demos.
- **Maintain Interest**: Keep consumers engaged through social interactions, reviews, referrals, or additional purchases.

The Publish module makes it easy to promote brands, join the conversation, and build local advocacy at scale.

2 | Access Publish

Accessing Publish



In the left menu hover over Publish to display the options available for curating social media content.

Social Publish Options	Description
Post Management on page 12	**Calendar**: The Calendar manages all social media posts. It provides a view of scheduled posts, switching between month, week, or day views to plan an effective content strategy.
	Workflow: The Workflow manages social media posts through various stages, such as drafts, approval, and scheduling.
	Tasks: The Tasks page is based on the rules set in the workflow, efficiently tracking all posts that require your action.
Recent Posts on page 28	Recent Posts displays all published posts and the engagement metrics, such as likes, shares, and comments.
Data Explorer on page 32	Data Explorer helps track key metrics for social media profiles and posts, sharing real-time insights into the performance.
Discover Content on page 42	Discover Content finds the most recent positive reviews and relevant, industry-specific content, keeping your social media fresh and engaging.
Dashboards on page 47	The Dashboard provides a view of all dashboards monitored across all teams. From this page the dashboards can be edited, duplicated, deleted, archived, and more.

Social Publish Options	Description
Reports on page 56	Reports are created from dashboards. They can be scheduled to share automatically.
Media Library on page 64	The Media Library displays creative assets like images and videos, and allows the creation of new posts.
Campaigns on page 72	The Campaigns page creates and tracks social media campaigns.
Manage Tags on page 78	Use Tags to categorize content by brand, location, type, theme, or other relevant topics.
Smart Social on page 83	Schedule automated posts in advance.
Segments on page 87	Create Segments to add extra filtering options to the dashboards, providing additional views for deeper analysis of post data.
Publish Assistant on page 90	The Publish Assistant helps post specific post types (e.g., Facebook stories, Pinterest posts) to networks that are not connected by API.
Admin on page 92	**Preferences**: Set preferences for Publish such as automatically adding media to the media library and setting RSS monitors, link parameters, and bitly authorization.
	Report Email Group: Create a group of emails to easily send reports to.
	Custom Sentiment: Customize the criteria for the sentiments assigned to posts.

3 | Post Management

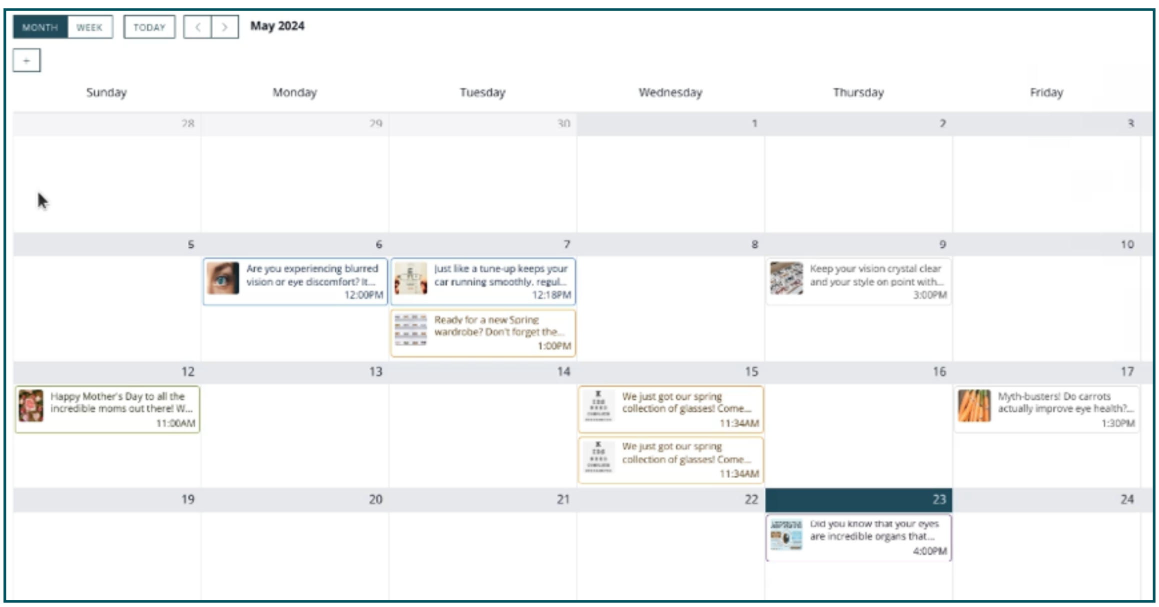
Post Management

Keep track of all scheduled and published content in a central, easy-to-manage place.

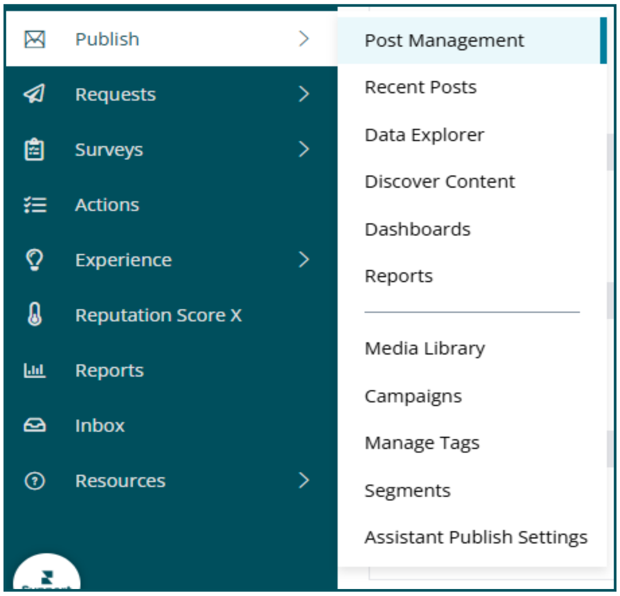
Calendar

The Calendar displays all content in a dynamic, color-coded view, sorted by source, location, or other variables. From here, create or edit scheduled posts, and view the entire social content plan to instantly see what is published, what is scheduled, and what needs to be added. Switch between month, week, or day views to plan an effective content strategy.

This tool is valuable for ensuring consistency by managing campaigns across multiple platforms and keeping track of deadlines. It also allows for easy adjustments to reschedule or add posts directly from the calendar view, streamlining the workflow.

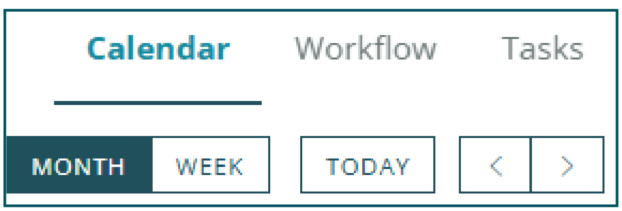


Getting Started

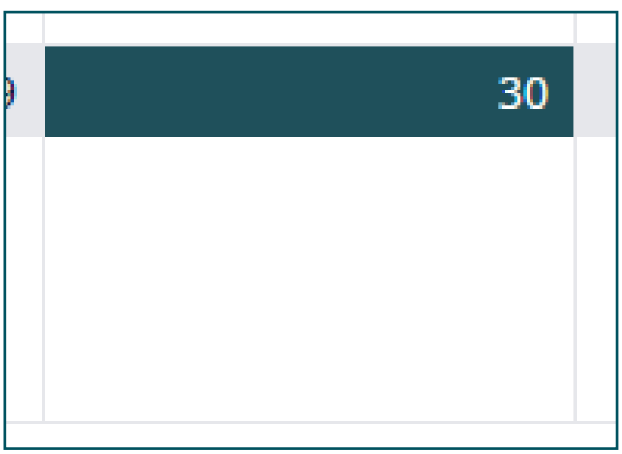


1. Go to **Publish** > **Post Management** in the left navigation menu.

By default, the calendar displays the current month. Each post is shown as a thumbnail on the day it was published or is scheduled to go live.



To see one week at a time, schedule posts a few months in advance, or duplicate a previous post, toggle between the Month/Week views or use the directional arrows to move from month to month.

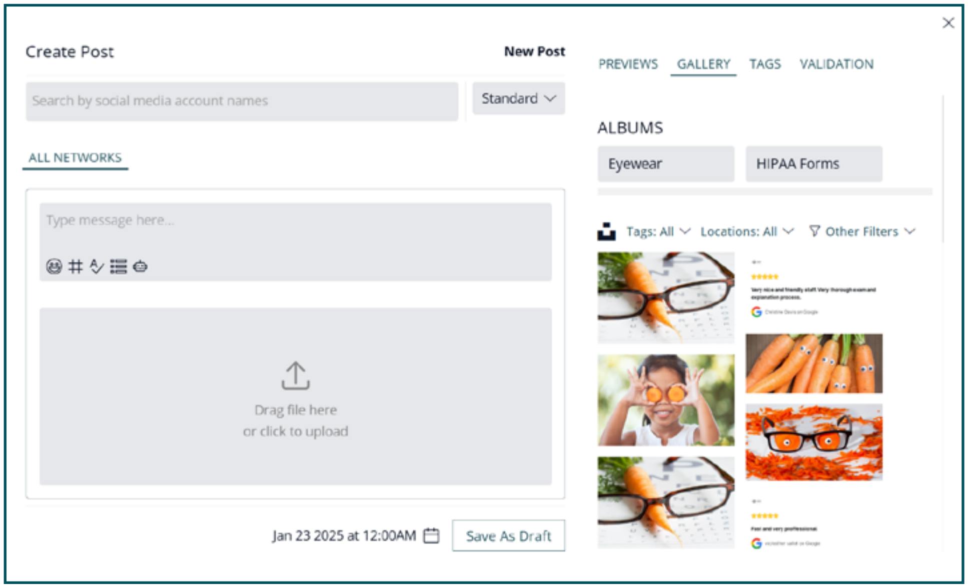


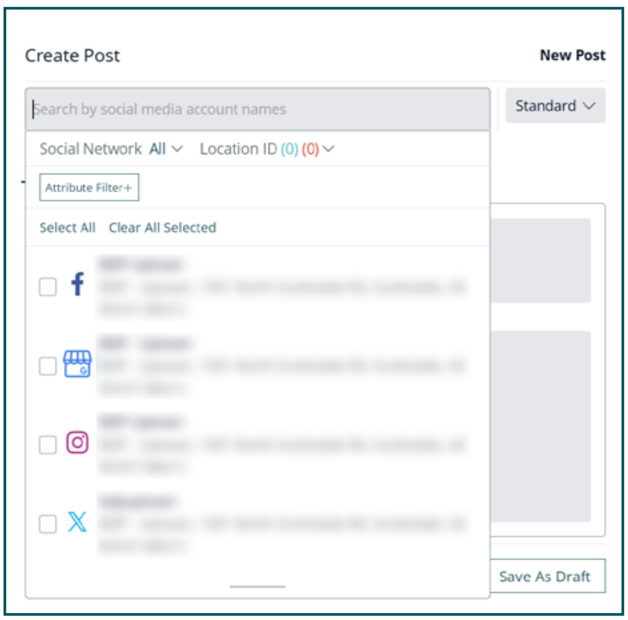
For the current day, look for the day with the solid green box.

Create a Post

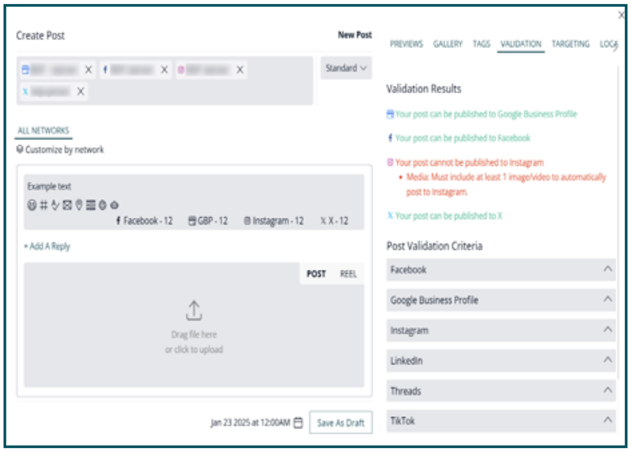
To create content directly from the calendar,

1. Click the date square or click the green plus in the upper right corner to schedule a post.





2. Click in the **Search** field to open a drop-down and select the social account for this post.
   - There are three selection type options:
     - **Standard**: Select individual accounts.
     - **Location and Network**: Select individual locations and the networks rather than specific social accounts.
     - **Campaign**: Select a currently active campaign.



3. Enter the text for the post.

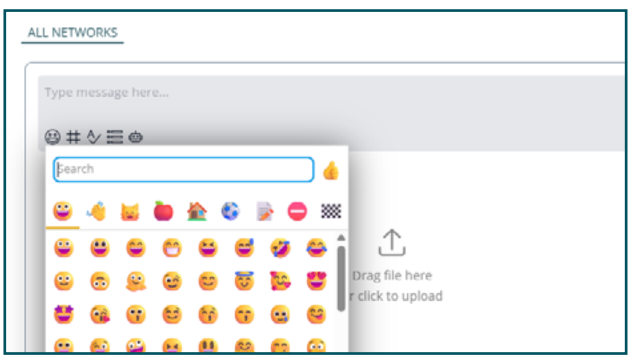
   a. Click **Customize by network** to change the post for individual networks.

      ○ If the post is created before customizing, the content and images can be changed per network.

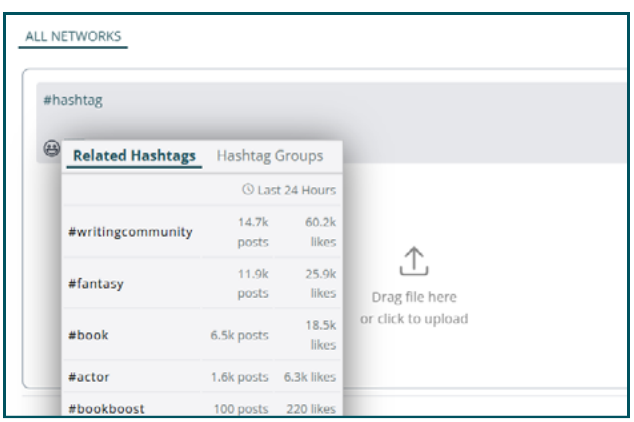
      ○ If **Customize by network** is clicked first, the post will need to be created separately for each network.

   b. Click **Add A Reply** to include a reply to your post.

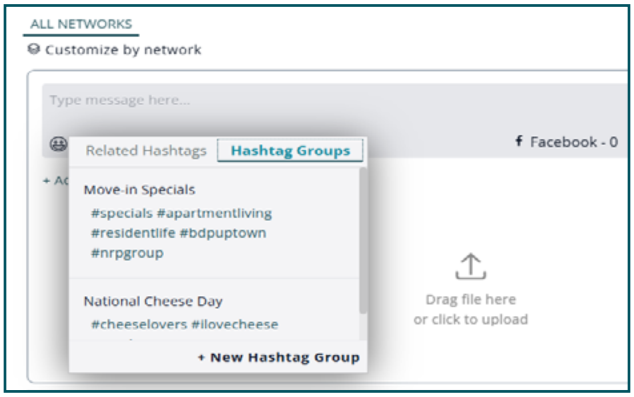
4. Use the icons in the message box to help customize the text for the post.



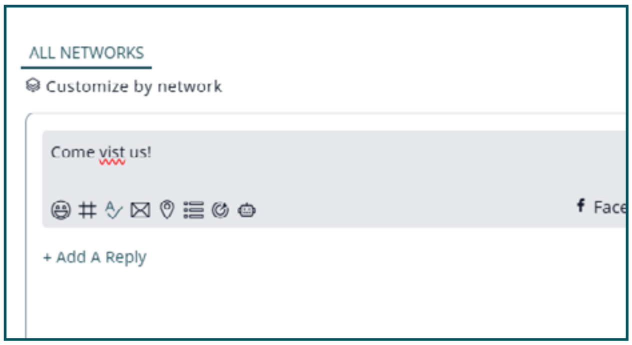
- Insert Emoji adds one or more emojis to the post text.



- Related Hashtags provides additional hashtags related to the hashtags included in the post.

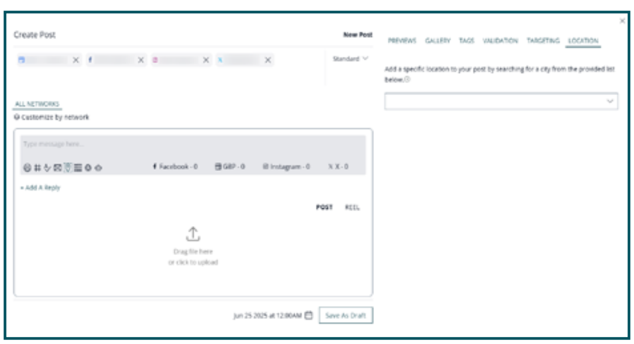


- ○ Under the **Hashtag Groups** tab, click **+New Hashtag Group** to create a group of hashtags or select a previously created group of hashtags to include in the post.

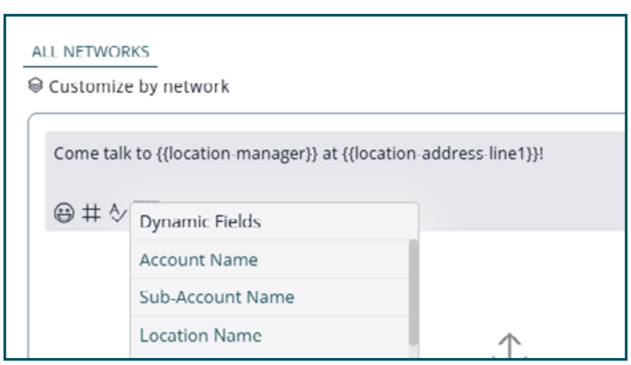


- Toggle Spellcheck checks for spelling errors in the text.

- Add Direct Message includes a button for a direct message in the post.
  - ○ This is only available for posts on X.

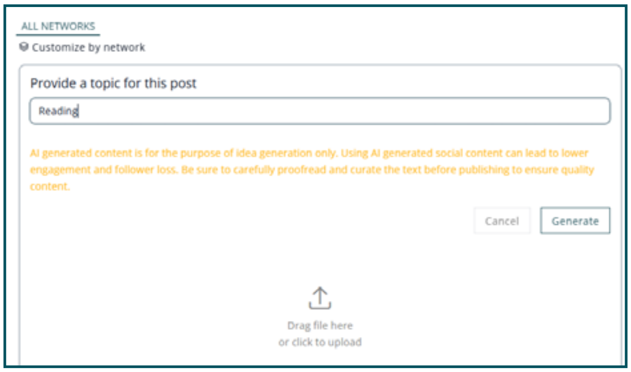


- Edit Post Location opens the **Location** tab for the post.
  - ○ This is only available for posts on X.

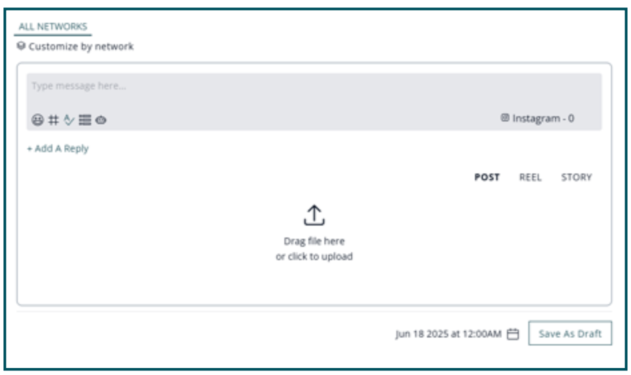


- Insert Custom Fields adds variable fields that update depending on the social accounts selected for the post.

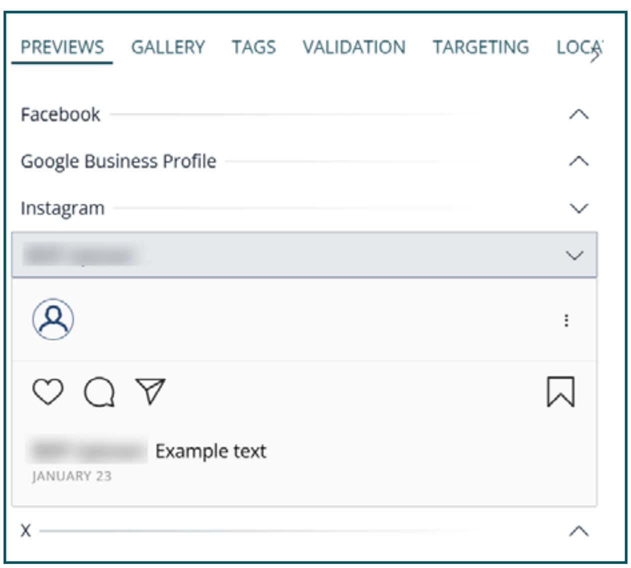
- Facebook Targeting opens the **Targeting** tab for the post.
  - This is only available for Facebook posts.



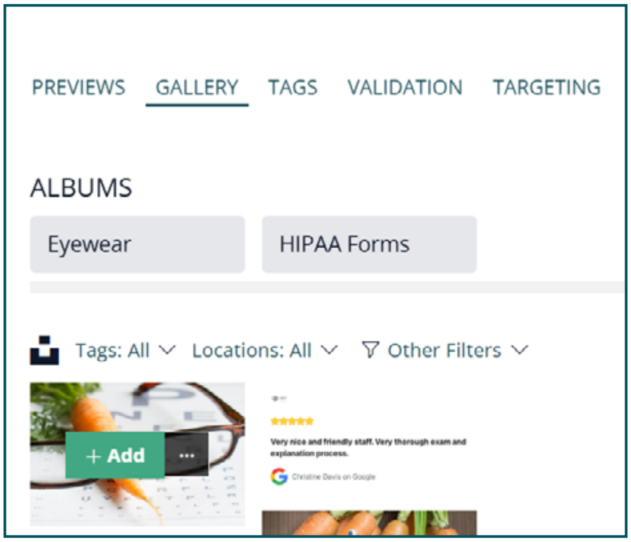
- AI Generated Content generates post ideas from a topic with AI.
  - Always proofread posts generated by AI to ensure they are correct before publishing.



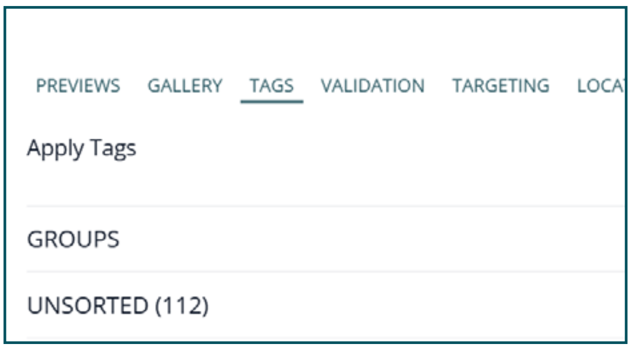
5. Drag-and-drop a file or click the upload icon to upload media to the post.
   - To create a Reel or Story for the post, click **Reel** or **Story** in the top right corner of the upload box.
     - The Reel option is only available for Facebook and Instagram.
     - The Story option is only available for Instagram.



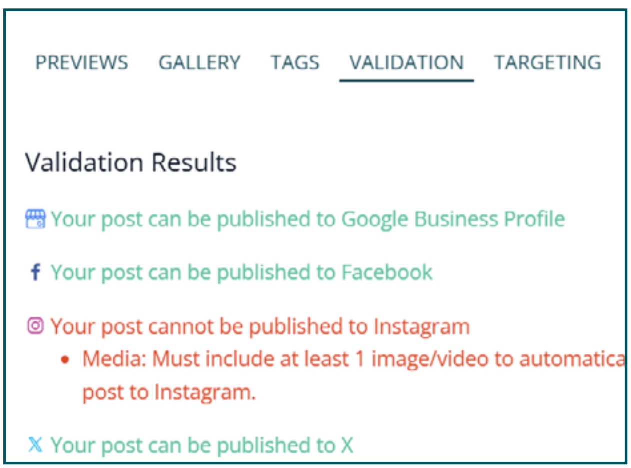
6. Use the tabs to the right of the **Create Post** box to complete the post.
   - **Previews** shows what the post will look like on each social media network.



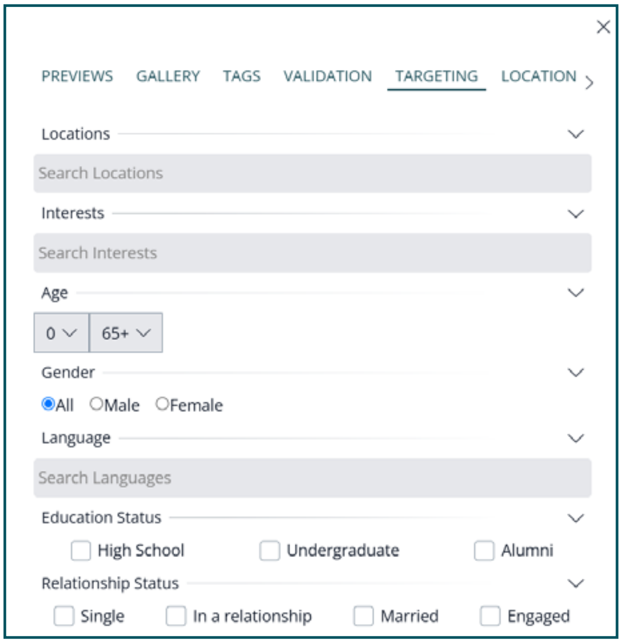
- **Gallery** gives the user access to the Media Library. From this tab, select the media to add to the post.



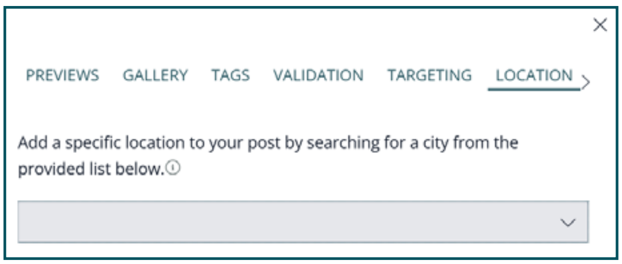
- **Tags** allows the user to sort and filter the post internally. See Manage Tags on page 78 for more information.



- **Validation** explains if the post can be posted on the selected social media networks.
  - Open the drop-downs to view the specific criteria that needs to be met for each network or see the Appendix on page 108.



- **Targeting** allows the user to specify who will see the post.
  - This is only available for Facebook posts.
  - This is a suggestion to Facebook about who to target. The Facebook algorithm ultimately determines who receives the post.



- **Location** allows the user to geo-tag the post.
  - This is only available for X (Twitter).

7. Click **Save as Draft** to save the post.
   - This adds the post to the workflow and displays it as a draft in the calendar.
   - For more information, see Workflow on page 23.

Status Symbol

The status symbols show which posts are scheduled, unscheduled, and published in the calendar.

- Scheduled Content:
  - A solid-colored box indicates the post is set to go live on the day/date it appears on the Calendar. The color indicates a tag has been applied.
  - Scheduled content with a tag appears in the color assigned to the tag.
  - Scheduled content without a tag displays in light gray.
- Unscheduled Content
  - A dotted line border indicates the post is not ready to go live. It may still be in draft, need additional assets, or require approval before it can be scheduled.

  - Unscheduled content with a tag is outlined in the color assigned to the tag.
  - Unscheduled content without a tag is outlined in a light gray border.

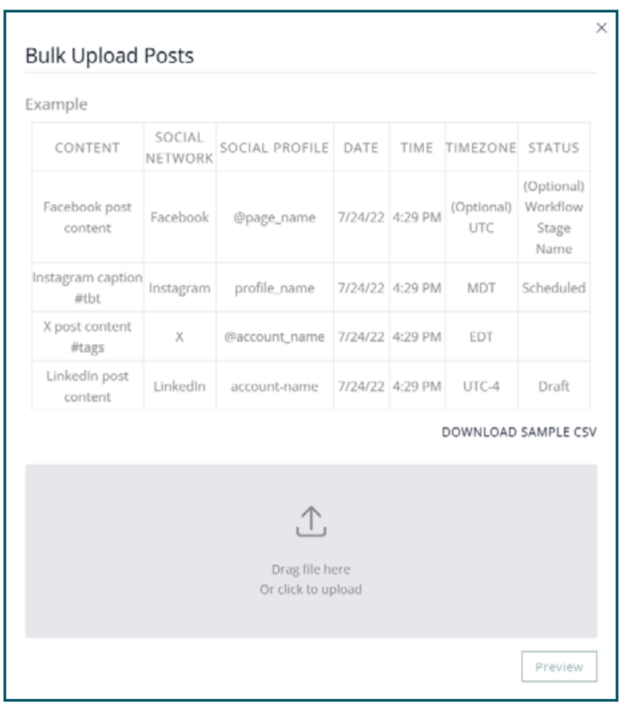
- Published Content
  - After a post is successfully published, it displays in a white box with a green check icon in the lower right corner.
  - Published content with a tag is outlined in the color assigned to the tag.
  - Published content without a tag—or imported from outside the Reputation platform (i.e., the native social platform)—is outlined in a light gray.

- Failed to Publish
  - If a post fails to publish on all social networks, a white box with a red exclamation mark displays.
  - If a post fails to publish on some networks but not all, a yellow check mark displays.
    - Click on the post to see which social networks failed to publish. Review the troubleshooting details to understand how to resolve the issue.

Bulk Upload

To bulk upload posts created outside of the Reputation platform,

1. Click the green drop-down arrow next to the plus in the top right corner.
2. Click **Bulk Post Upload**.



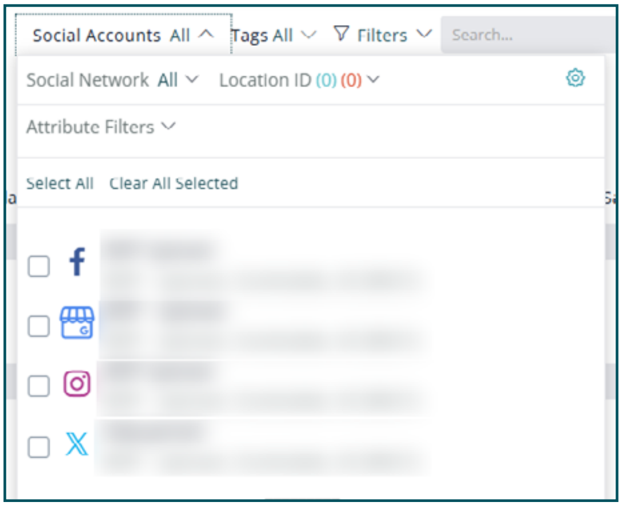
3. Add the posts to a .csv file and upload them.
   a. Click **Download Sample CSV**, for an example of how to set up a bulk upload .csv file.

Organize the Calendar

Social Accounts

Sort the calendar to show the posts for specific social media networks.

- Use the Attribute Filters to narrow the categories by location, city, location type, state, zone, or brand.



- Use the Location ID to see the posts for a specific business location in the Reputation platform.

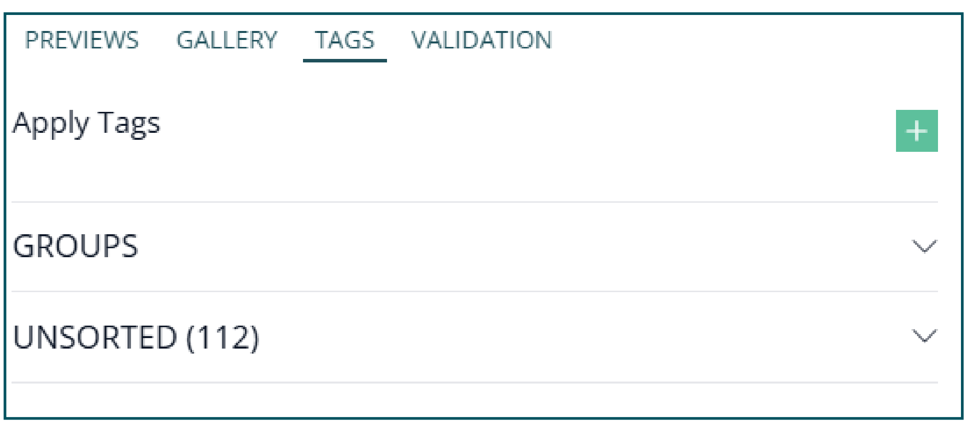
Tags

Use tags to categorize content by brand, location, type, theme, or other relevant topics. Each tag has a unique color. When a post is tagged, it shows up in the calendar with the associated tag color.

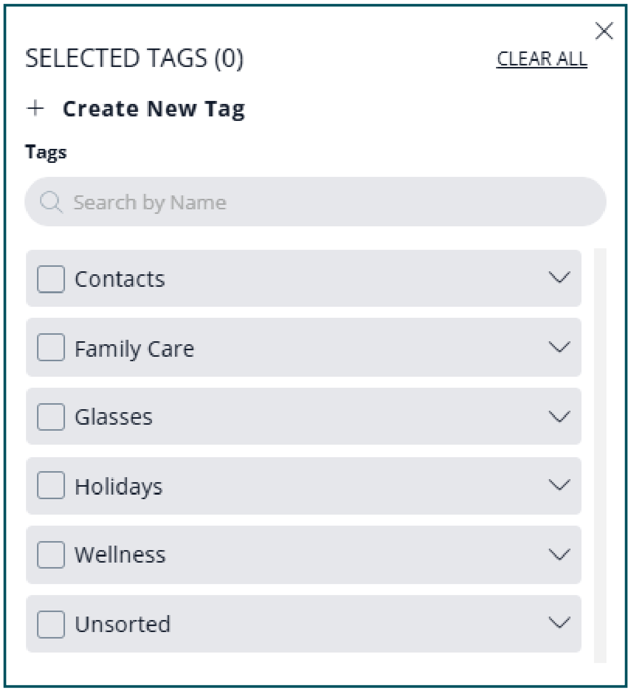
From the calendar, tags can be created in two ways, through the post in the calendar and through the Tags drop-down at the top of the page.

To create a tag from the post in the calendar,

1. Click on the post to tag.
2. Click the **Tags** tab.



To create a tag with the Tags option at the top of the page,



1. Click the **Tags** drop-down.
2. Click **Create New Tag**.

For more information about tags, see Manage Tags on page 78.

Filters

To filter the posts in the calendar,

1. Click **Filters** at the top of the page.
2. Select the filter(s) to apply.
    - **Network**: This filters the posts by the social media network the post is assigned or published to (e.g., Facebook, Instagram, etc.).
    - **Status**: This filters the posts by the status of the post in the assigned workflow (e.g., scheduled, published, etc.).
    - **Post Type**: This filters the posts by how they were created (Assistant, Campaign, or Standard).
    - **Post Source**: This filters the posts by where they were created—Reputation or the social network.

Search

In the top right, type a keyword, tag, or term into the search bar to find a specific post in the calendar.

Workflow

The **Workflow** tab manages the progress of social media posts through various stages, such as drafts, approval, and scheduling. This interface provides a clear visual breakdown of where each post stands in the content creation process.

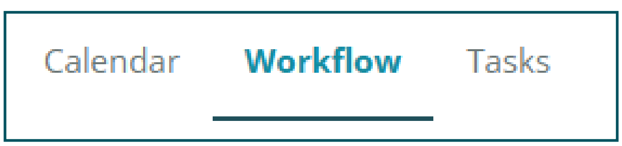
The Workflow view allows team members to review, approve, or make necessary edits before a post goes live to ensure posts are polished and aligned with content strategy. Additionally, add tags or make adjustments as posts move through different stages, streamlining the publishing workflow.

In addition to the above day-to-day activities, users can also engage with Workflow content in a number of ways, including:

- **Add Content**: Create content directly from the workflow by clicking the green plus icon in the top right corner.
- **Edit Content**: Click the pencil icon in the top left corner of the post to make required and requested changes.
- **Tag Content**: Add tags by clicking the Add Tag button or click the X next to applied tags to delete them.
- **Sort Content**: Use the top-line filters to quickly sort the workflow by source, location, tags, and more.

Getting Started

1. From the left navigation menu, go to **Publish** > **Post Management**.
2. Click the **Workflow** tab.

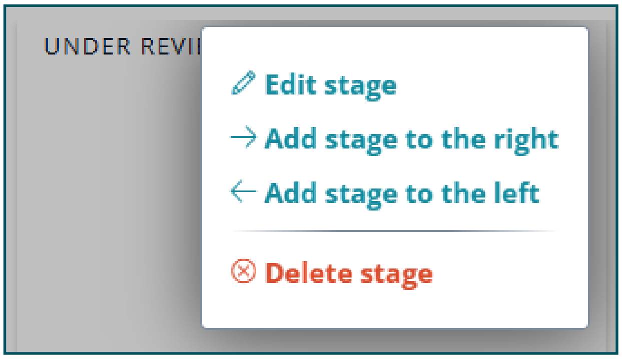


Build A Workflow

By default, a workflow begins with two stages: **Draft** and **Scheduled**. Either keep this simple two-step approval process or add more stages to mirror the current content creation and review/approval structure.

Add a Workflow Stage

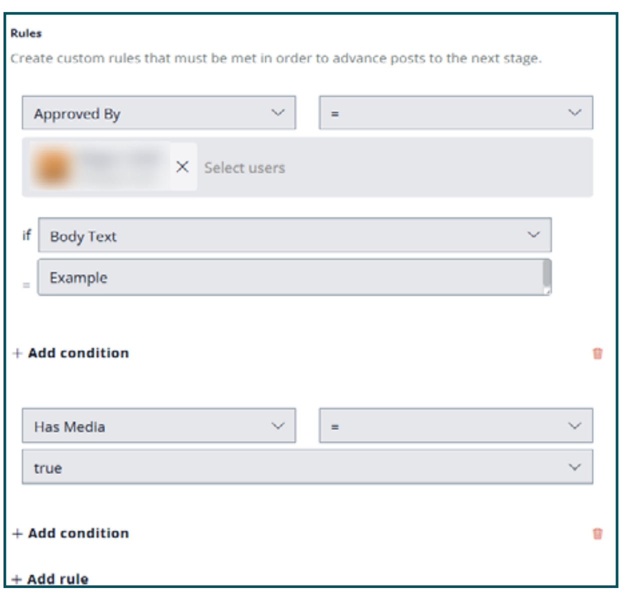
1. Click the ellipsis icon in the upper right corner of the previous stage to add or delete a workflow stage.
2. Select **Add Stage to the Right** or **Add Stage to the Left**.



3. In the new stage, click the ellipsis in the upper right corner.

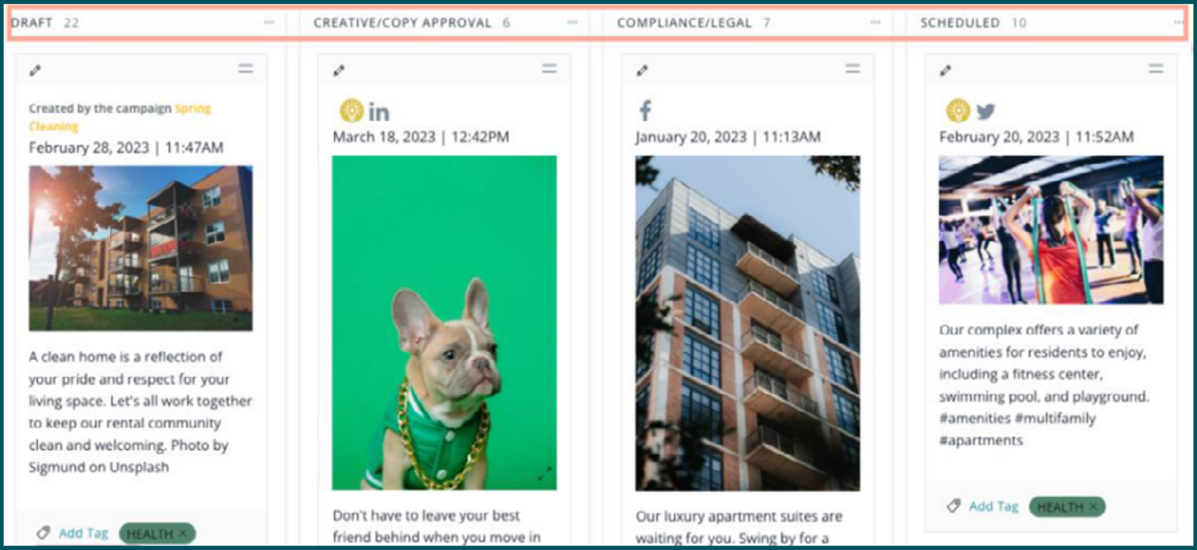
> **Note**: Drafts is always the first stage; Scheduled is always the last. While it is possible to change the name of these two stages, the position remains the same.

4. Click **Edit Stage**.
5. Name the stage.
6. Search and select the usernames with the authority to review and approve content in this stage.



7. Create custom rules that must be met to advance posts to the next stage (e.g., the body text must contain a hashtag when posting to Facebook or posts must have a tag).
   - For stages requiring approval to advance or publish, ensure the appropriate users are assigned. If not, users encounter a message saying, “This Post doesn’t meet the requirements for this stage” when attempting to advance a post.
   - Set an approval condition by adding a new rule to the relevant stage and selecting the **Approved By** field.
8. Click **Save**.

Example



- The user has created a stage for Creative/Copy Approval and Compliance/Legal, in addition to the standard Draft and Scheduled stages.
- Each stage has specific publishing rules and team members who must approve the posts before they can move to the next stage.
- To advance a post to the next stage, grab the double line icon and drag it to the next lane to move it through the approval process.
- Team members can collaborate throughout the process, making edits and comments directly in the platform.

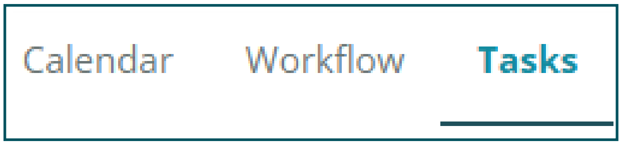
Tasks

The **Tasks** page is based on the rules set in the workflow. It efficiently tracks all posts that require an action.

In the **Tasks** section,

- Review and manage individual posts through a detailed workflow.
- Edit content.
- Add tags.
- Track the post's progress using the "Approve and move to Stage" buttons.
- Reject posts that need further revision.

Getting Started

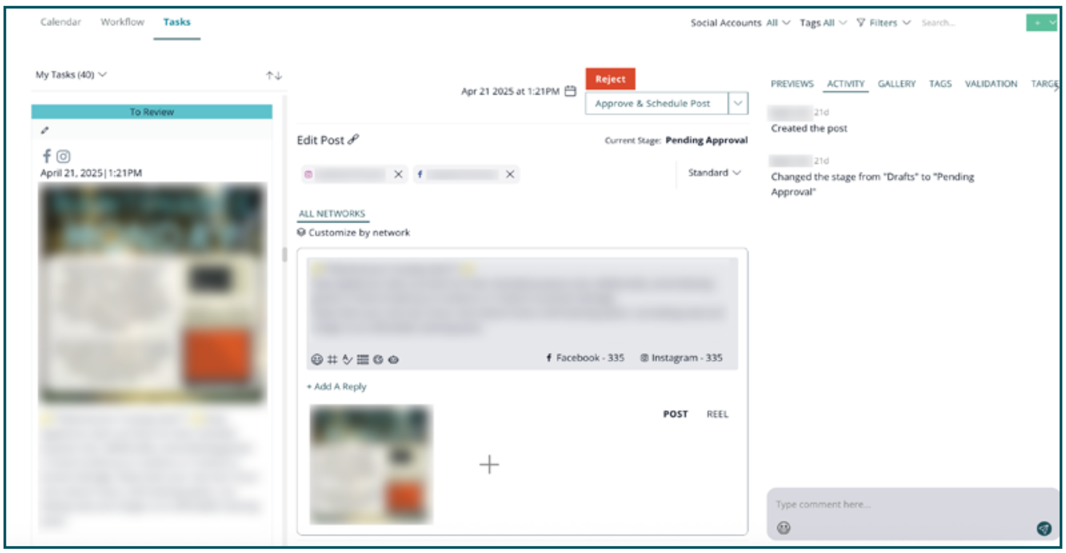


To access the **Tasks** tab,

1. Go to **Publish** > **Post Management**, then click the **Tasks** tab.

A post appears in the Task queue in the following situations:

- You are an approver for a stage with a post in the workflow.
- You are assigned to a rejected post.
    - When rejecting a post, a drop-down prompts you to assign it to a user.
- You are @mentioned in the activity section of a post.



In the Tasks queue:

- Each post is marked with a colored bar, depending on the task that needs to be completed.
- Sort the tasks by what is assigned to you or everyone.
- Click on a post to open the post details.

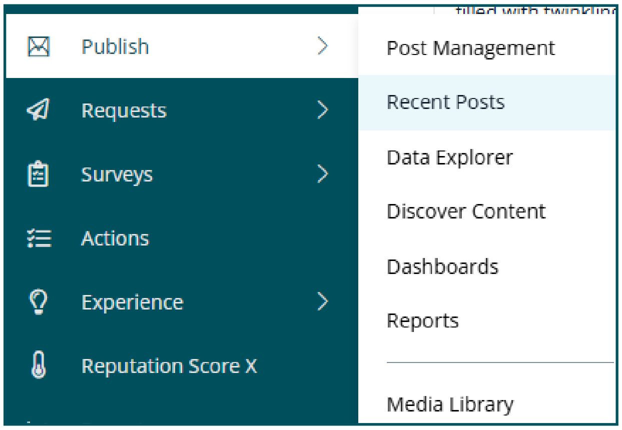
In the edit details view:

- Make edits to the text, network, and media of the post.
- Click **Reject** to notify the original creator of the post that more revision is needed before approval.
- Click **Approve and Schedule Post** to move the post to the final stage in the workflow.
- Use the tabs on the right to see more of the post details.
    - For more information about the tabs, see Create a Post on page 14.

4 | Recent Posts

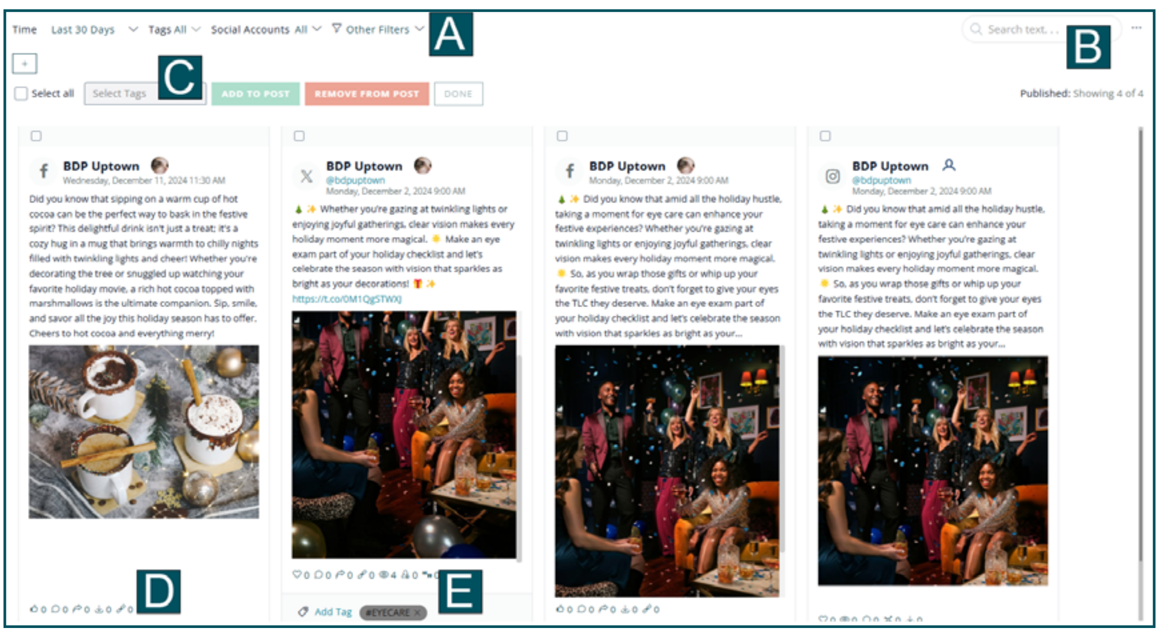
Recent Posts

Getting Started



On the left navigation menu, go to **Publish** > **Recent Posts** to view every published post along with its engagement metrics, such as likes, shares, and comments.

Use **Recent Posts** to identify live content, posted topics, and gaps in posting. To streamline the view, apply filters to display only the needed content, and add or remove tags from one, some, or all live posts, refining the search to manage the social content.



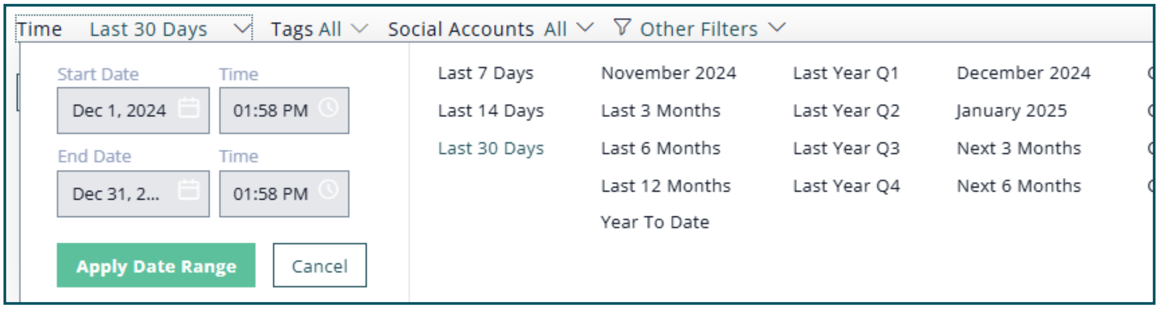
A	Filter and sort content by source, location, tags, or timeline.
B	Search by keywords or other text to find all posts that include those terms.
C	Add or remove tags to make quick work of finding and reporting on your content.
D	See post engagements such as comments, likes, and shares.
E	Click to view, add, or remove tags associated with the post.

Filters

Easily refine the content search by applying the top-line filters. Choose how to view the recent posts by selecting the relevant categories from the drop-down menu.

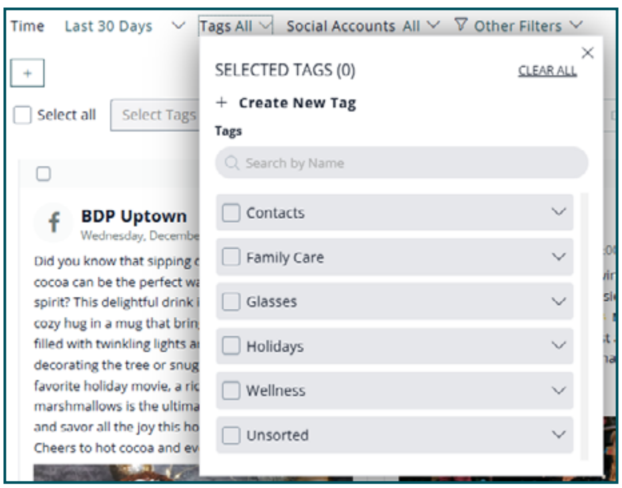
Filter options include date ranges, or specific locations and tags, to hone in on the most relevant content for analysis.

Time Filter



Tag Filter

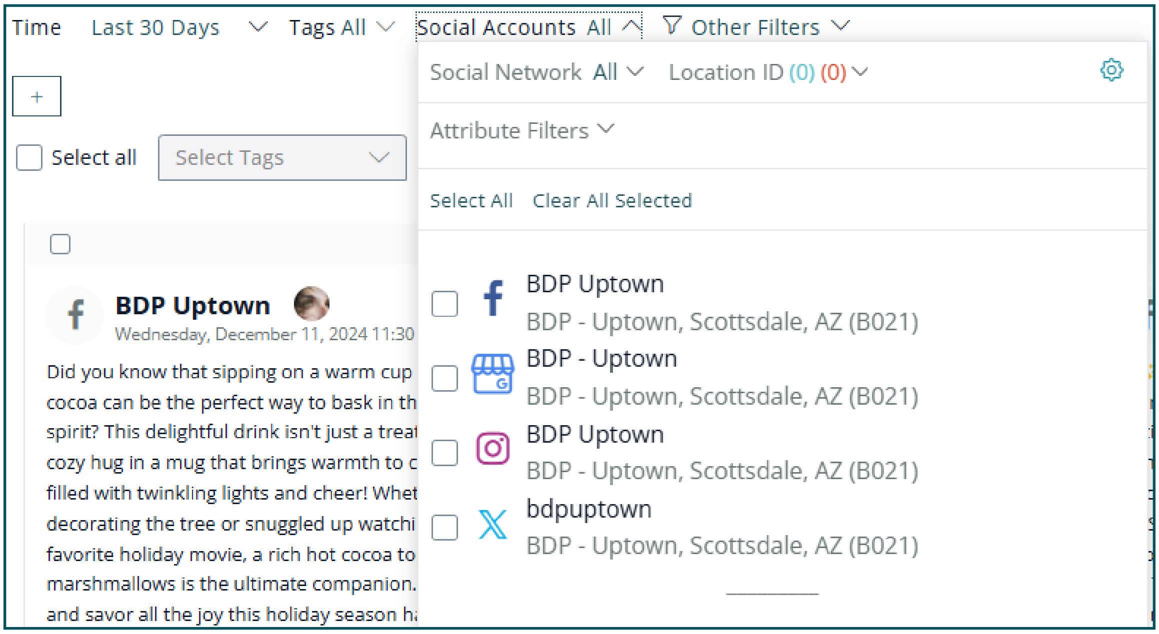
Select individual posts or use the **Select All** option to make updates quickly and efficiently.



To add tags to one post, click the **Add Tag** icon and select the desired tag(s).

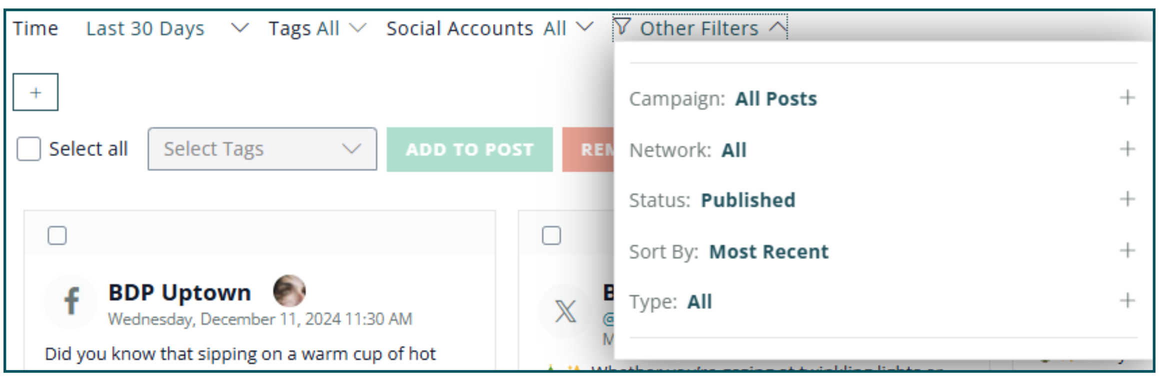
For more information about using tags, see Manage Tags on page 78.

Social Accounts (Integrations) Filter



Content Status (Other) Filter

Sort by campaigns, networks, the status in the workflow, the most recent, the number of engagements or impressions, or if the post is a post, story, or ad.



Search

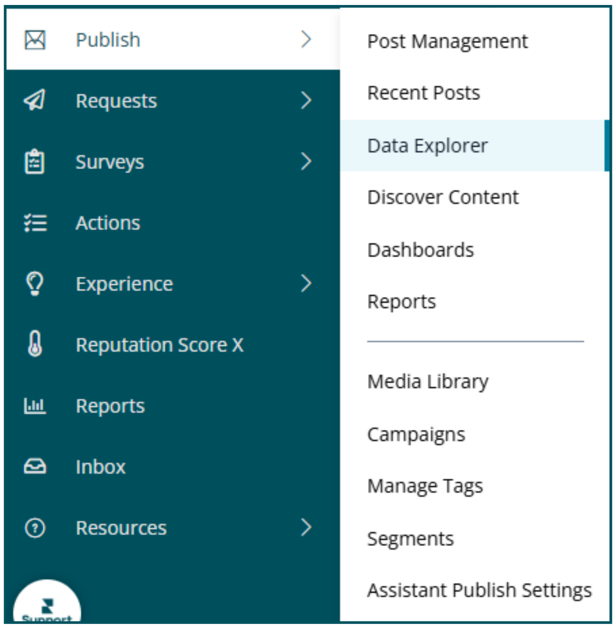
Type a keyword, tag, or phrase into the search bar. The platform automatically sorts recent posts to show only those that contain the term in any format (post copy, hashtags, tags, etc.).

5 | Data Explorer

Data Explorer

Data Explorer tracks key metrics for social media profiles and posts, with real-time insights into performance. Filters for date range, social network, and account grouping help monitor trends and optimize strategy.

Getting Started



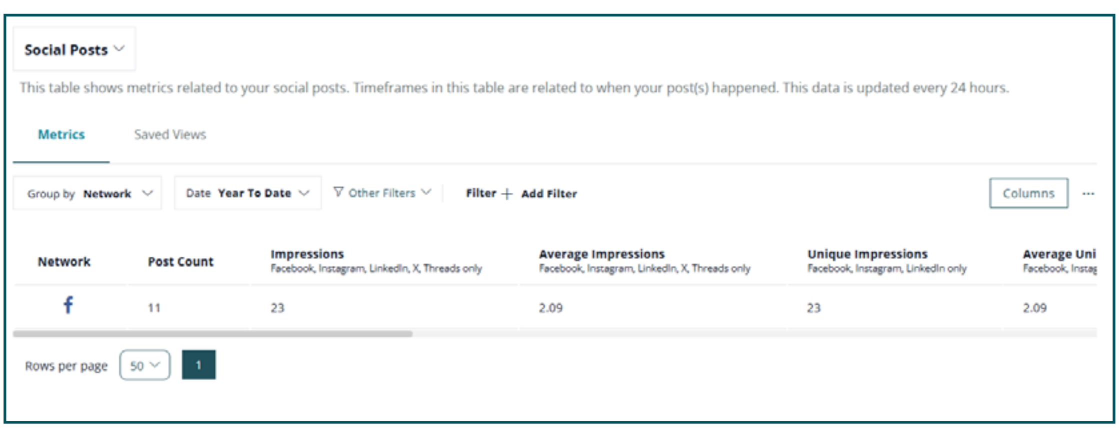
To access the Data Explorer,

1. Go to **Publish** > **Data Explorer** in the left navigation menu.
2. Use the drop-down in the top left to select **Social Posts** or **Social Profiles**.

Social Posts

Analyze engagement metrics such as likes, comments, and shares for individual posts to see which content resonates most.

Use the Data Explorer tool to stay on top of social media performance and make informed adjustments to boost engagement.



Use the filters and columns to customize the chart to display the relevant metrics. The data is updated every 24 hours.

Filters

Filter	Description
Group by	Group the data by any of the account customer filters, along with tags and campaigns.
Date	Display the data within a selected or custom date range.
Social Network	Display data for specific social networks.
Custom Filters	Click **Filter** to add secondary filters such as Brand, City, Location, Location Type, State, Zone.

Columns

Use the tab next to the column headers to drag the columns into a chosen order. Some of the columns are only available for specific social networks.

Column	Available Network	Description
Group by		This column displays the option selected in the Group by filter.
Post Count		The post count includes all posts, video, and reels and it does not include stories.
Impressions	Facebook	The total number of times your page(s) posts entered a person's screen.
	Instagram	As of April 21, 2025, Instagram no longer offers an impressions number. This number is now Instagram Reach which is defined as the number of unique Instagram users that have seen your reel at least once. For Instagram, this number will always be the same as unique impressions.
	LinkedIn	The total number of times your posts have been viewed.
	X	The total number of times your posts have been viewed. A view is counted if any part of the post is visible on the screen.
	Threads	The number of times a post was played or displayed.

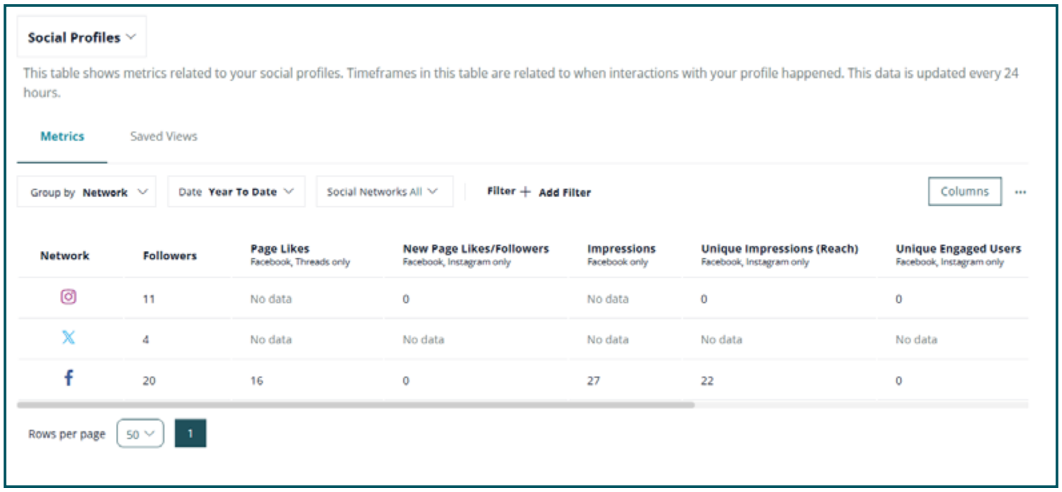
Column	Available Network	Description
Average Impressions	Facebook	The number of times your page(s) posts entered a person's screen divided by the post count.
	Instagram	The number of times the user's Instagram media was viewed divided by the post count.
	LinkedIn	The number of times posts were viewed divided by the post count.
	X	The number of times your posts have been viewed (not unique by user) divided by the post count. A view is counted if any part of the post is visible on the screen.
	Threads	The number of times a post was played or displayed divided by the post count.
Unique Impressions	Facebook	The total number of people who had the page's posts enter their screen. This is sometimes displayed as reach within Facebook.
	Instagram	The total number of unique Instagram accounts that have seen your account(s) media.
	LinkedIn	The total number of people who have viewed your posts.
Average Unique Impressions	Facebook	The total number of people who had your page's posts enter their screen (sometimes displayed as reach within Facebook) divided by the post count.
	Instagram	Total number of unique Instagram accounts that have seen your account(s) media divided by the post count.
	LinkedIn	The total number of people who have viewed your posts divided by the post count.
Likes	Facebook	The total "like" reactions of a post.
	Instagram	The number of likes on your post minus the number of unlikes.
	LinkedIn	The number of likes on a post. This field can become negative when members who liked a sponsored share later unlike it. The like is not counted because it is not organic, but the unlike is counted as organic.
	X	A count of how many times a post has been liked.
	TikTok	The number of likes the video has received.
	Threads	The number of likes on a post.
Anger	Facebook	Total "anger" reactions on a post.
Love	Facebook	Total "love" reactions on a post.
Sad	Facebook	Total "sad" reactions on a post.
Wow	Facebook	Total "wow" reactions on a post.

Column	Available Network	Description
Total Reactions	Facebook	The sum of the Likes, Anger, Love, Sad, and Wow Reactions.
	Instagram	The number of likes on your post minus the number of unlikes.
	LinkedIn	The number of likes on a post. This field can become negative when members who liked a sponsored share later unlike it. The like is not counted because it is not organic, but the unlike is counted as organic.
	X	A count of how many times a post has been liked.
	TikTok	The number of likes the video has received.
Shares	Facebook	The share count of your posts. The share count may include deleted posts and posts you cannot see for privacy reasons.
	Instagram	The number of shares of your post(s).
	LinkedIn	The number of shares of your posts.
	X	A count of how many times the post(s) have been reposted. This does not include quote reposts ("Reposts with comment").
	TikTok	The number of shares the video(s) received.
	Threads	The number of times a post was reposted.
Replies/ Comments	Facebook	The count of comments on your post(s).
	Instagram	The number of comments on your post(s) minus the number of deleted comments.
	LinkedIn	The number of comments on your post(s).
	X	A count of how many times your post(s) have been replied to.
	TikTok	The number of comments your video(s) have received.
	Threads	The number of replies on a post.
Link Clicks	Facebook	The number of times people clicked on links on your post(s).
	LinkedIn	The number of clicks on a post.
	X	A count of the number of times a user clicks on a URL link or URL preview card on your post(s).
Total Clicks	Facebook	The number of times people clicked anywhere in your post(s) without generating a story.
	LinkedIn	The number of clicks on a post.
	X	A count of the number of times a user clicks on a URL link or URL preview card on your post(s).

Column	Available Network	Description
Video Views	Facebook	The number of times a video is played for at least three seconds, or for nearly their total length if they are shorter than three seconds. During a single instance of a video playing, time spent replaying the video is excluded.
	Instagram	As of April 17, 2025, this number is now Instagram views, defined as the total number of times the video Instagram Media has been seen. Prior to April 17, 2025, this number represented Plays, defined as the number of times the reel starts to play after an impression is already counted. This is defined as video sessions with 1 ms or more of playback and excludes replays.
	X	A count of how many times the video(s) included in your post(s) were viewed. This is the number of video views aggregated across all posts in which the video(s) have been posted. This means the metric includes the combined views from any instance where the video(s) have been reposted in separate posts.
	TikTok	The number of video views your video(s) received.
Total Engagements	Facebook	The sum of Likes, Anger, Love, Sad, Wow, Shares, Comments/ Replies, and Total Clicks.
	Instagram	The sum of Likes, Shares, and Comments/Replies.
	LinkedIn	The sum of Likes, Shares, Comments/Replies, and Link Clicks.
	X	The sum of Likes, Shares (reposts), Quote Reposts, Comments/ Replies, and Link Clicks.
	TikTok	The sum of Likes, Shares, and Comments/Replies.

Social Profiles

On Social Profiles, view metrics like followers, page likes, impressions, and reach to understand how the audience engages with an overall profile.



Use the filters and columns to customize the chart to display the relevant metrics. The data is updated every 24 hours.

Filters

Filter	Description
Group by	Group the data by any of the account customer filters.
Date	Display the data within a selected or custom date range.
Social Network	Display the data for specific social networks.
Custom Filters	Click **Filter** to add secondary filters such as Brand, City, Location, Location Type, State, and Zone.

Columns

Use the tab next to the column headers to drag the columns into a specific order. Some of the columns are only available for specific social networks.

Column	Available Network	Description
Group by		This column displays the option selected in the **Group by** filter.
Followers The number in the chart is from the most recent date in the selected time frame. For example, if the time frame is July 1-31, the follower count presented is the followers on July 31st.	Facebook	The number of page followers.
	Instagram	The total number of Instagram users following your account(s). This is not available on Instagram accounts with fewer than 100 followers.
	LinkedIn	The number of LinkedIn members following your organization page(s).
	X	The total follower count.
	TikTok	The total followers count.
	Threads	The total number of followers on threads.
Page Likes The number in the chart is from the most recent date in the selected time frame. For example, if the time frame is July 1-31, the follower count presented is the followers on July 31st.	Facebook	The number of users who like the page(s). For global pages this is the count for all pages across the brand.
	Threads	The number of likes on all posts.
New Page Likes/ Followers	Facebook	The number of new people who have liked your Page(s).
	Instagram	The total number of new followers each day within the specified range. This is not available on Instagram accounts with fewer than 100 followers. Instagram says to expect a delay when getting the number of new followers, so this value may be a few days behind.
Impressions	Facebook	The number of times content from or about your page entered a person's screen. This includes posts, stories, ads, and other content or information on your page.

Column	Available Network	Description
Unique Impressions (Reach)	Facebook	The total number of people who had content from or about your page enter their screen. This includes posts, check-ins, ads, social information from people who interact with your page, and more. Meta estimates this metric.
	Instagram	Total number of unique users who viewed at least one of your account(s) Instagram Media. Repeat views and views across different Instagram media owned by the Instagram User of the same account are only counted as a single view. This includes ad activity generated through the API, Facebook ads interfaces, and the Promote feature.
Unique Engaged Users	Facebook	This metric was deprecated by Facebook on March 14, 2024.
	Instagram	The number of accounts that have interacted with your content, including ads. Content includes posts, stories, reels, videos, and live videos. Interactions can include actions such as likes, saves, comments, shares or replies. This metric is estimated and in development by Meta.
Total Interactions	Instagram	The total number of interactions from posts, stories, reels, videos, live videos, and boosted content.
Page Consumptions (Clicks)	Facebook	This metric was deprecated by Facebook on September 16, 2024.
Profile Views	Instagram	Total number of users who have viewed the your account(s) within the specified period. This metric has been deprecated by Instagram on December 23, 2024 and is no longer provided.
	Threads	The number of times a profile was viewed.

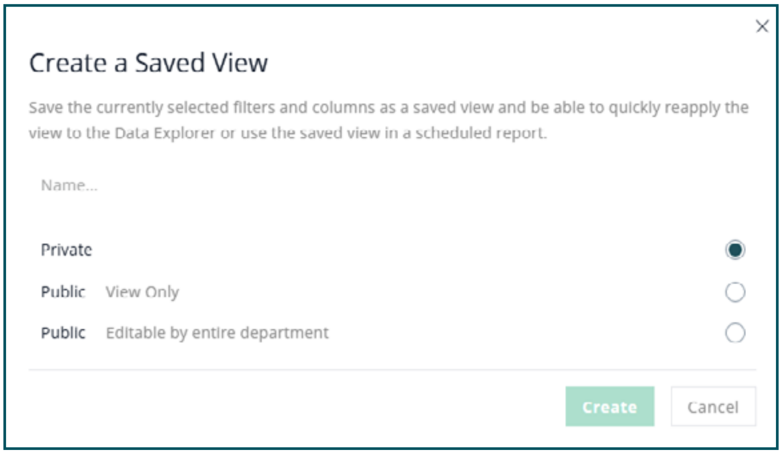
Saved Views

Filter the Data Explorer and save a view to easily access relevant statistics or create reports.

To save a view,

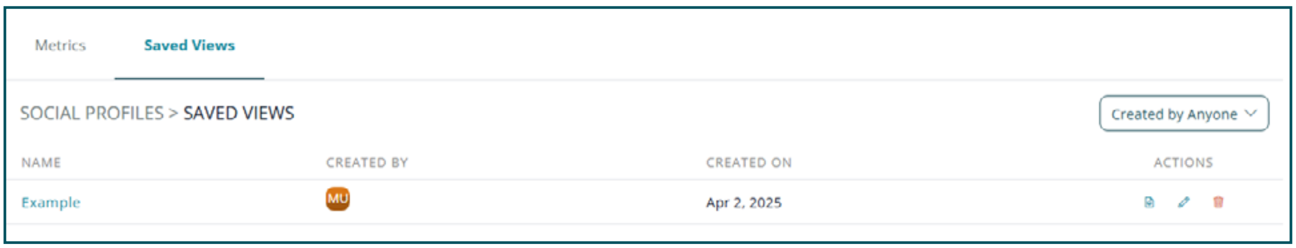
1. Click the ellipsis in the top right corner of the chart.
2. Click **Save View**.

3. Name the view and select the privacy setting.



4. Click **Create**.

   - The view displays under the **Saved Views** tab.



5. Under the **Saved Views** tab, click the name of the view to open it or use the icons to create a report, edit the name or privacy settings, or delete the view.

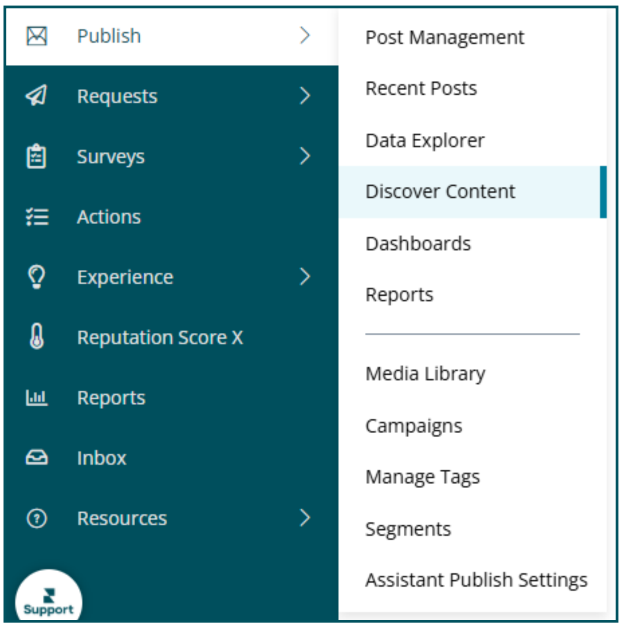
6 | Discover Content

Discover Content

The **Discover Content** page finds relevant, industry-specific content to share with your audience, keeping your social media fresh and engaging.

By selecting monitors from the Listen module or pulling recent 5-star reviews, discover valuable content that can resonate with customers.

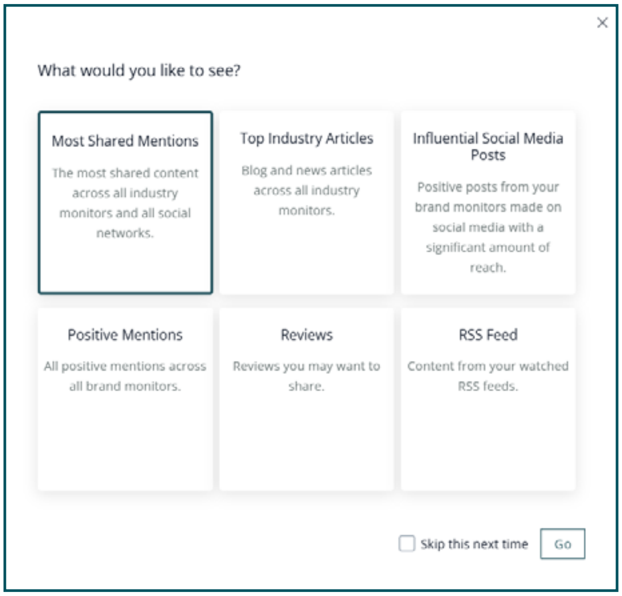
Getting Started



To access this tool

1. Go to **Publish** > **Discover Content** in the left navigation menu.
    - The Discover Content Wizard displays.

Discover Content Wizard



1. Select the content to view.
   - Six content options are available through the Reviews and Listen modules.
     - Four options are only available with a subscription to the Listen module.

Content Option	Type	Description
Most Shared Mentions	Listen	See the most shared content across all industry monitors and all social networks. This is only available with a Listen subscription.
Top Industry Articles	Listen	See blog and news articles across all industry monitors. This is only available with a Listen subscription.
Influential Social Media Posts	Listen	See positive posts with a significant amount of reach. This is only available with a Listen subscription.
Positive Mentions	Listen	See all positive mentions across all brand monitors. This is only available with a Listen subscription.
Reviews	Reviews	The Reviews page displays the most recent five-star reviews that have text content. The Reviews that are shown are based on the location of the user.
RSS Feed	RSS Feed	See content from watched RSS feeds. Click **Edit Monitors** to update the RSS Monitors. • For more information about RSS Monitors, see RSS Monitors on page 93.

2. Click **Go**.
   - To skip this pop-up the next time you access this page, click **Skip this next time**.
   - Discover Content displays the selected content.

3. To modify the search criteria of the page,
    a. Use the first drop-down filter to select a new content type for the page.
    b. Click the ellipsis (...) in the top-right corner of the page and click **Show Wizard**.
4. To share a post from any of the content pages,
    a. Click on a post to display the **Create Post** pop-up.
    b. Copy the article’s pre-populated URL to share it, or create a post with the link and click **Save as Draft**.
        - For more information about creating a post, see Create a Post on page 14.

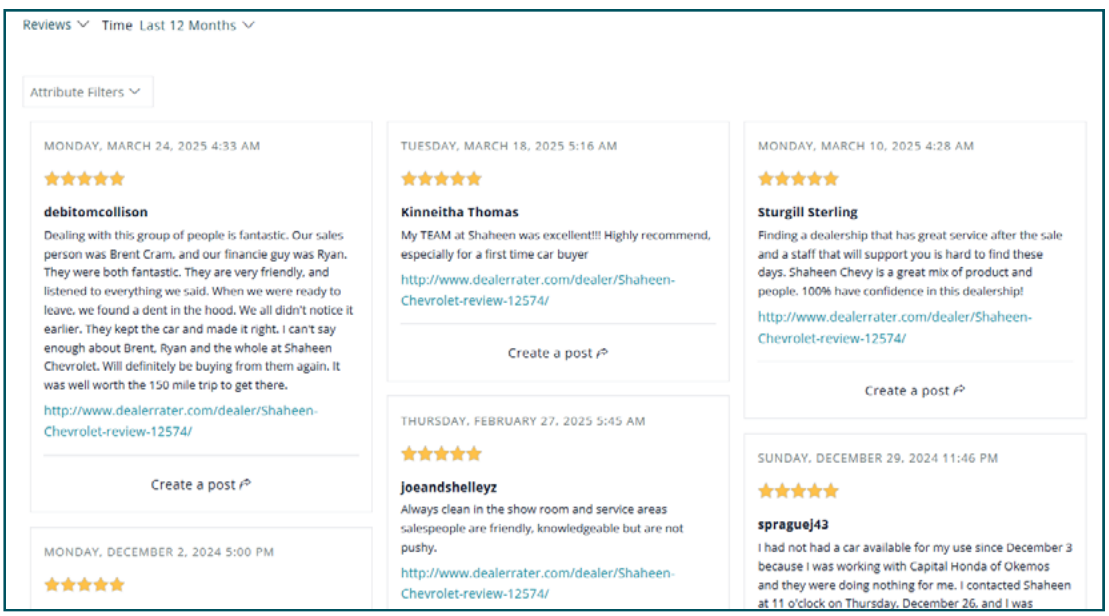
Listen

For more information about the Listen module, see the Social Listening User Guide.

Reviews

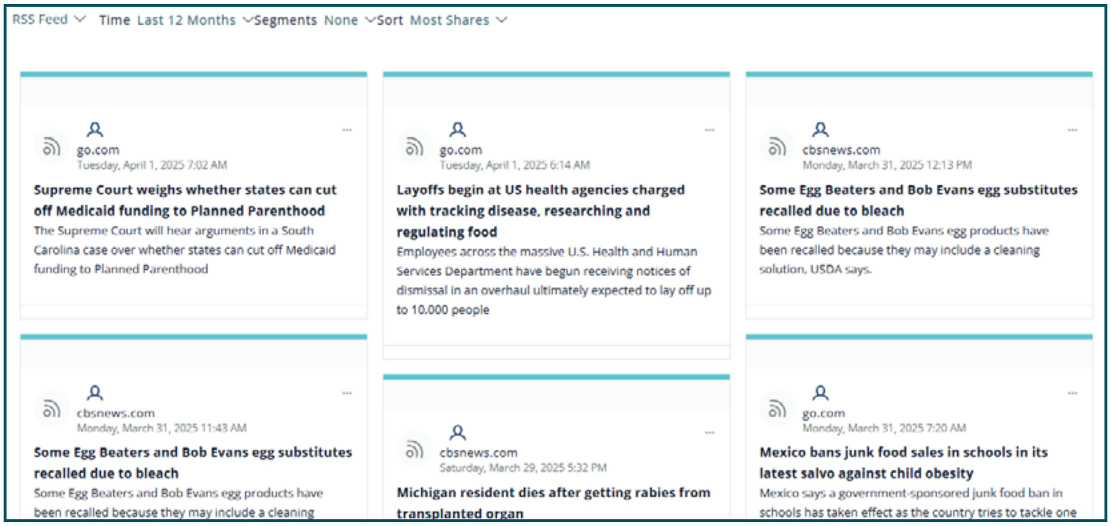
The **Reviews** page displays the most recent five-star reviews that have text content. The Reviews shown are based on the location of the user.

Use the filters to sort the reviews by a custom or selected date range.



RSS Feed

The RSS Feed displays content from the monitored RSS feeds. For more information about setting up RSS Monitors, see RSS Monitors on page 93.

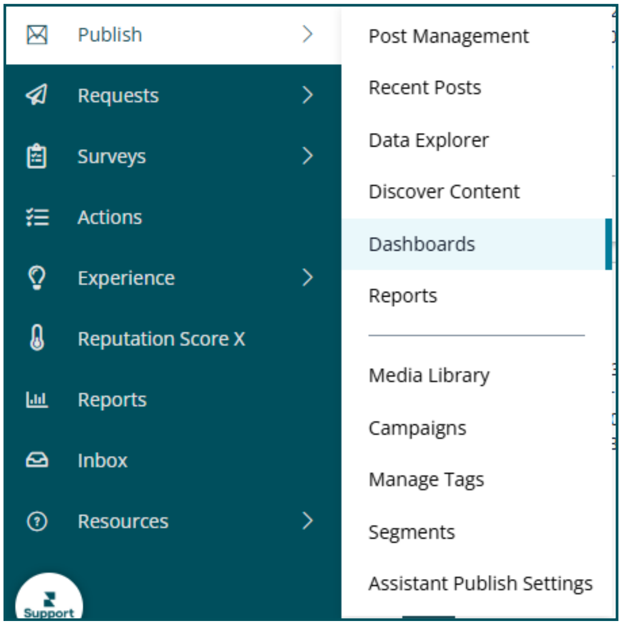


7 | Dashboards

Dashboards

The **Dashboards** page features all the dashboards created to track the metrics that matter most. Leverage ready-made templates or build custom dashboards to deliver timely, actionable insights.

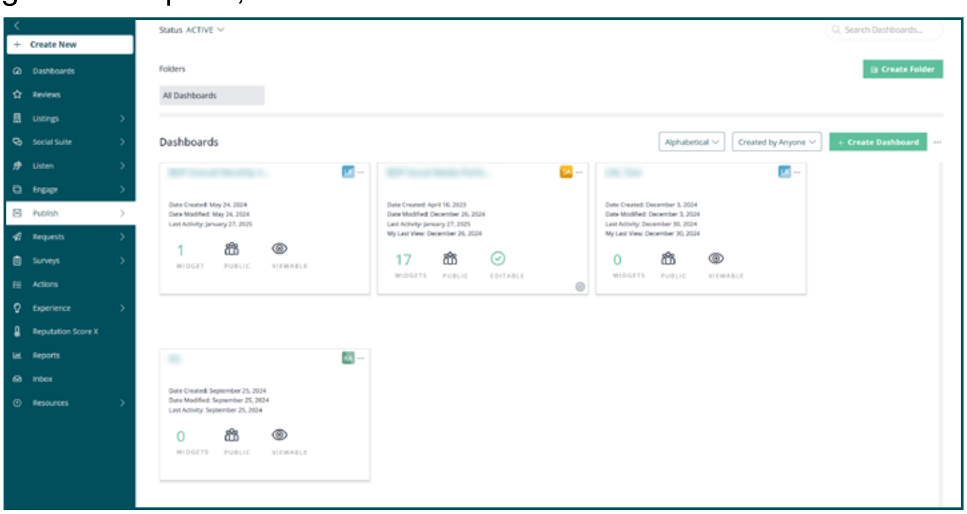
Getting Started



1. From the left side navigation menu, go to **Publish** > **Dashboards** to locate the dashboards in a tile view.

On the landing page:

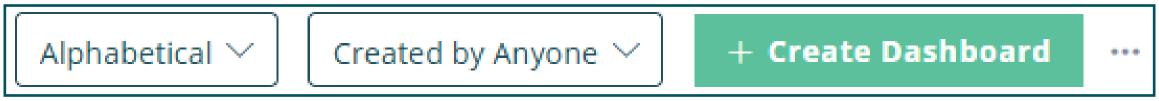
- **Sort**, **Delete**, or **Archive**: Use the drop-down menus to see specific dashboards; click the ellipsis to clean things up by deleting or archiving old or unused dashboards.
- **Create Folders**: Organize the dashboards by source, location, or other categories for easy viewing and sharing.
- **Edit**, **Report**, **Duplicate**, **Archive**, and **Delete**: Within each dashboard, edit details, generate reports, and more.

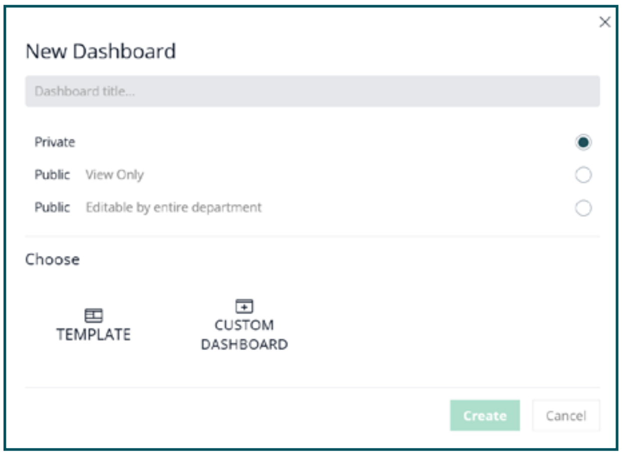


Build a Dashboard

To create a new dashboard,

1. Click the **Create Dashboard** button in the right corner to launch the **New Dashboard** pop-up window.





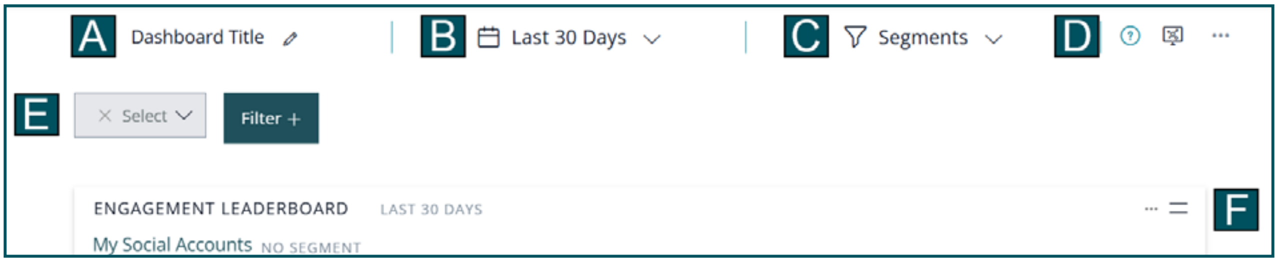
2. Give the dashboard a title.
3. Choose the status of the dashboard.
    - **Private**: Only you can view & edit.
    - **Public—View Only**: Others in your organization can see the dashboard, but cannot make changes.
    - **Public—Editable**: Users with Dashboard permissions can view and edit this dashboard.
4. Click **Template** and use the drop-down to select the **Overview Dashboard** template or click **Custom Dashboard** to create a custom dashboard.
5. Click **Create**.
    - See the **Build with a Template** section below for further instructions.
    - See the **Build a Custom Dashboard** below for further instructions.

Build with a Template

The Template displays clear, concise visualizations of the most often measured social media metrics. It is possible to edit and move widgets to create a dashboard for specific needs.

For more information about editing a widget, see Configure a Widget on page 50.

To customize the template, use the top-line filters.

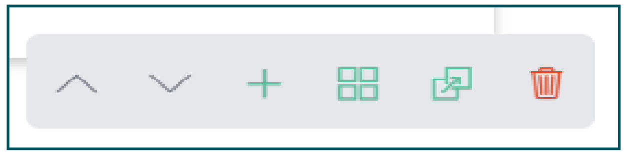


	Filter	Description
A	Dashboard Title	Click the pencil icon to update the title for the dashboard.
B	Date	Click the down arrow to create a custom date range or select a date range to apply to the widgets.
C	Segments	Click the down arrow to create a Segment or search the dashboard for a specific rule. For more information, see Segments on page 87.
D	Information Icon Command Center Mode Ellipsis	• **Information Icon**: This displays the Publish Data Collection which breaks down each social network and their metrics. • **Command Center Mode**: This opens a live feed that cycles through a display of the metrics from the dashboard. • **Ellipsis**: Generate a report, share a link to the dashboard, or archive the dashboard.
E	Custom Filter	Click **Filter** to add extra filters (such as brand, city, location, etc.) to the widgets in the dashboard template.
F	Widget Specific Filters	• **Drag and Drop**: Click the two lines to drag and drop the widgets into the desired order. They can be viewed as individual rows or up to three across. • **Ellipsis**: Edit the widget, make the widget fullscreen, duplicate the widget, or delete the widget.

Build a Custom Dashboard

Custom Dashboards start as a blank slate. Choose a visualization for each widget—like graphs, charts, and bubble maps—then place them in order of importance.

1. Click **Add Row** to add a widget.
    a. Use the top-line filters to sort and arrange the widgets on the customized dashboard. See the **Build with a Template** section above for details about the top-line filters.
    b. Hover the mouse over the lower right corner of the widget for more options to customize the dashboard.
        - Move the row up.
        - Move the row down.
        - Add a row.
        - Add a new widget.
        - Duplicate the row.
        - Delete the row.



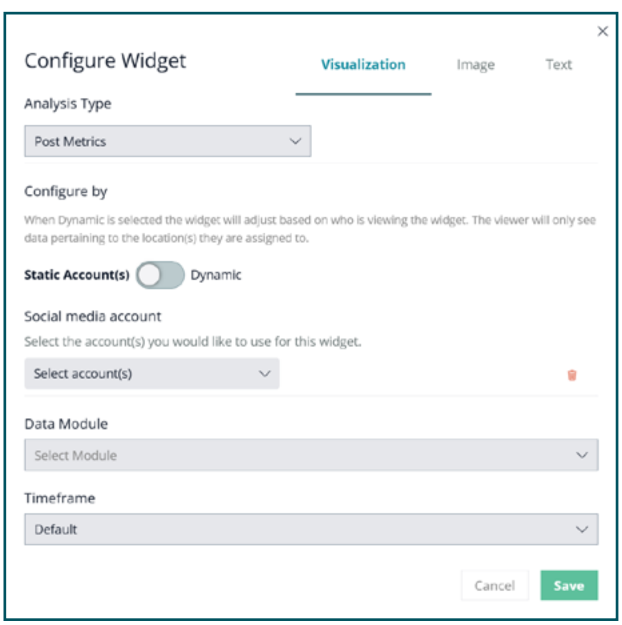
2. Click **Configure Widget**.

Configure a Widget

To configure a widget,

1. Select the **Analysis Type**: **Post Metrics** or **Profile Metrics**.
    - The rest of the options change depending on the Analysis Type selected.

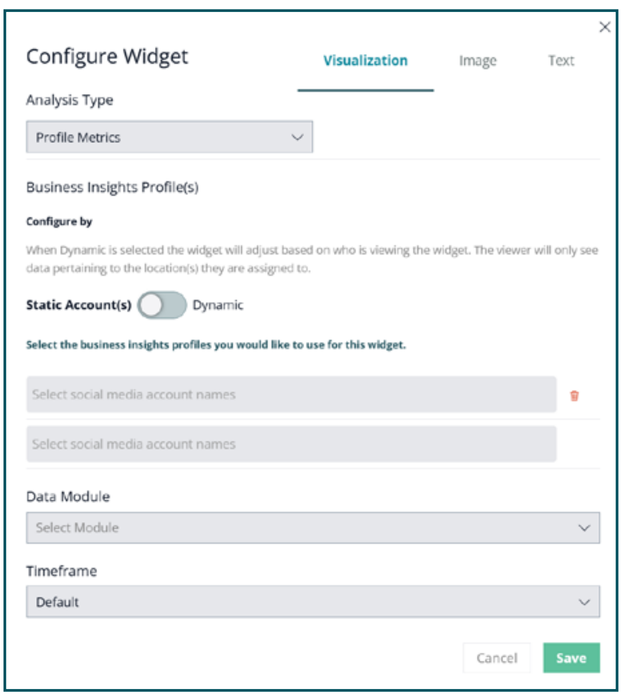
Post Metrics



1. Choose **Static Accounts** or **Dynamic**.
    - When **Static Accounts** is selected the widget displays the same way for every viewer.
    - When **Dynamic** is selected the widget adjusts based on who is viewing the widget. The viewer only sees data pertaining to the location(s) they are assigned to.
2. Select additional attribute filters (Location, City, Brand, etc.).

3. (Optional) Select a segment.
   - For more information about creating a segment, see Segments on page 87.
   - Adding segments increases restrictions. When multiple segments are applied, they all must be true for data to return.
   - Example:
     - If Network = Facebook AND Network = Instagram, no data is returned, as a post cannot be from both Facebook and Instagram.
     - If Network = Facebook OR Network = Instagram, data is returned.
4. Select a **Data Module**: **Engagements** or **Posts**.
5. Select the **Data Submodule**.
6. Select the **Visualization**.
   a. Click **Settings** to determine what is shown in a report.
7. Select a time frame.
8. Click the **Image** tab to add an image to personalize the widget thumbnail.
9. Click the **Text** tab to add more text to personalize the widget thumbnail.

Profile Metrics



1. Choose **Static Accounts** or **Dynamic**.
   - When **Static Accounts** is selected the widget displays the same way for every viewer.
   - When **Dynamic** is selected the widget adjusts based on who is viewing the widget. The viewer only sees data pertaining to the location(s) they are assigned to.
2. Select the Social Media Accounts to use for the widgets.
   - Click to choose your own accounts or your competitor's accounts.
3. Select the **Data Module**.

4. Select the **Timeframe** for the widget to cover.
5. Click the **Image** tab to add an image to personalize the widget thumbnail.
6. Click the **Text** tab to add more text to personalize the widget thumbnail.

Example: Create a Content Analysis Widget

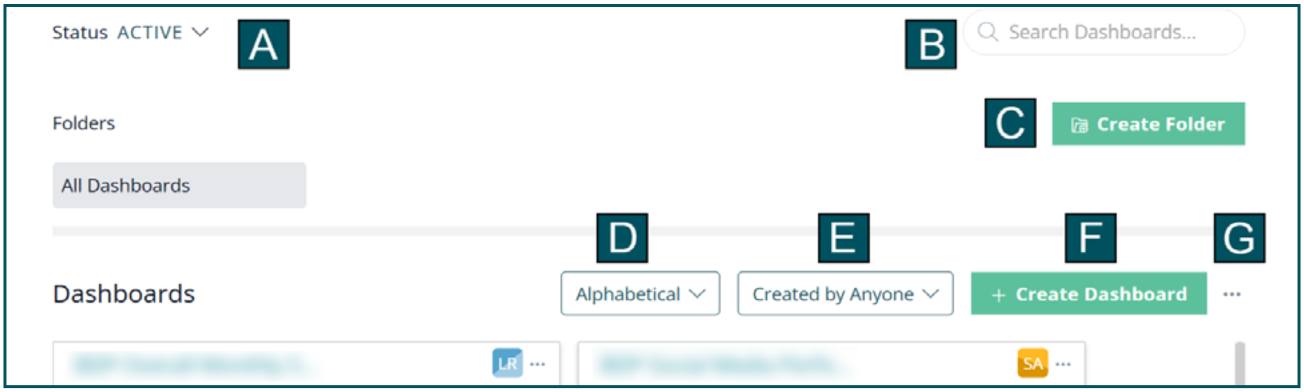
1. Select **Post Metrics**.
2. Click **Attribute Filters** to add the networks and pages.
3. Under Data Module, choose **Posts**.
4. Under Data Submodule, choose **Posts Over Time**.
5. Under Visualization, select **Line Graph**.
6. Under Timeframe, select 12 months and click **Save**.

This Content Analysis widget shows the post performance for the last 12 months.

Filter the Dashboards

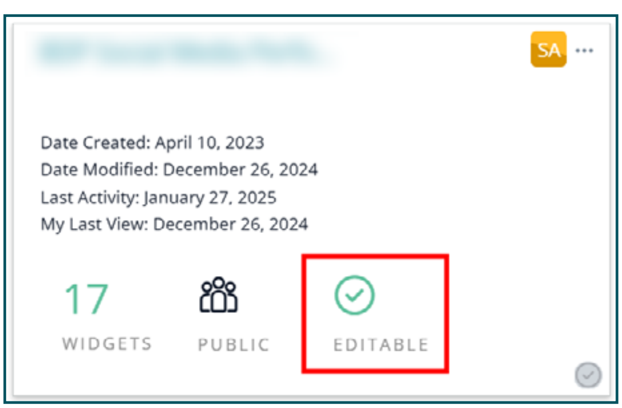
After the necessary dashboards have been created, use the top-line filters on the **Dashboard** page or the widget specific filters to sort the various dashboards for maximum usability.

Top-Line Filters

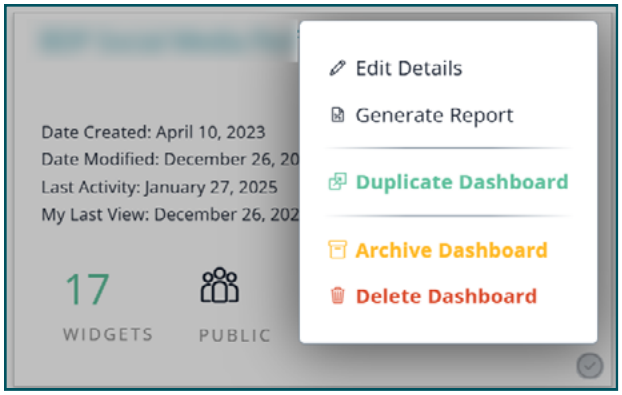


	Filters	Description
A	Status	View all dashboards, only active dashboards, or only archived dashboards.
B	Search	Use keywords to search for a specific dashboard.
C	Create Folder	Create as many folders as needed to organize the dashboards. Drag and drop dashboards into different folders.
D	Alphabetical	Sort by alphabetical, newest created, oldest created, or most recently used.
E	Created by	Sort by created by anyone, created by me, used by me, or system generated.
F	Create Dashboard	Create a new dashboard. See the **Build a Dashboard** section.
G	Bulk Dashboard Actions	Clear selection, restore selected dashboards, delete selected dashboards.

Widget-Specific Options



The widget-specific options are only available on dashboards that are editable.



1. Click the ellipsis in the right corner of the widget.
    - **Edit Details**:
        - Edit the dashboard name and permissions.
    - **Generate Report**:
        - Generate a dashboard report or a scheduled report.
        - See Reports on page 56 for more information on creating reports.
    - **Duplicate Dashboard**
        - Create a copy of the dashboard.
    - **Archive Dashboard**
        - Move the dashboard to the archived folder.
    - **Delete Dashboard**
        - Delete the dashboard.

Dashboard Reports

Generate reports to share from the dashboards. Schedule and share reports automatically (daily, weekly, monthly, or whenever needed) via email or print.

To create a report,

1. Click the ellipsis in the upper right corner of a widget and select **Generate Report**.

   OR

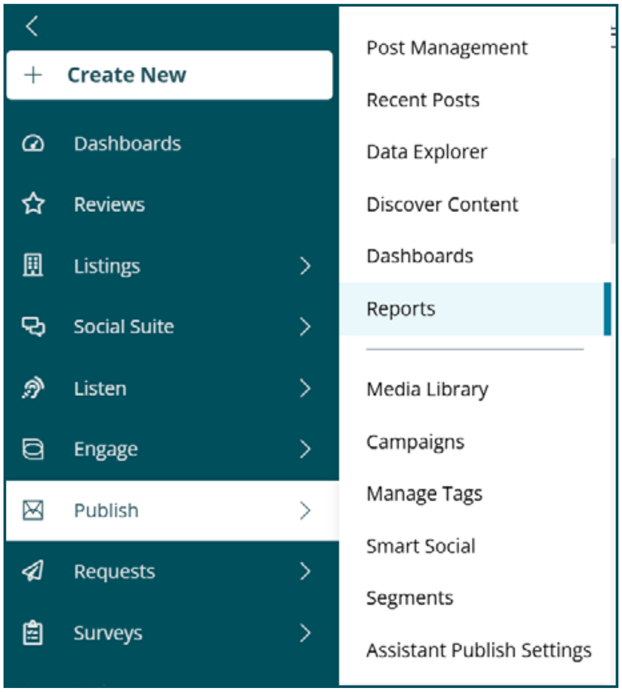
2. Go to **Publish** > **Reports**.

For more details about how to create a report, see Reports on page 56.

8 | Reports

Reports

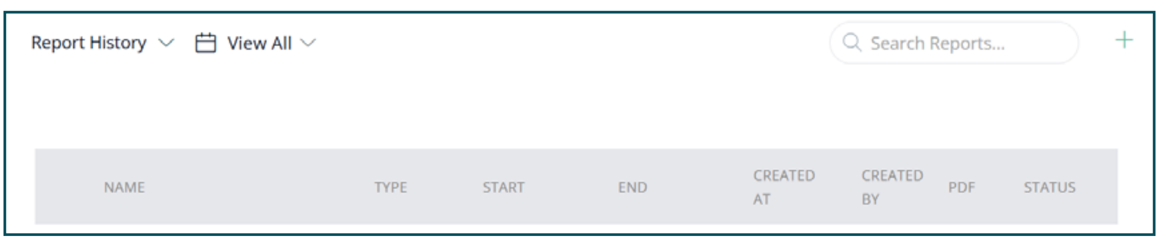
Getting Started



To access the **Reports** page,

1. Go to **Publish** > **Reports**.
   - This page only lists and creates reports for the Publish metrics.

On this page, create reports and see the report history and dashboard report schedules. Use the **View** filter to sort the reports by date.

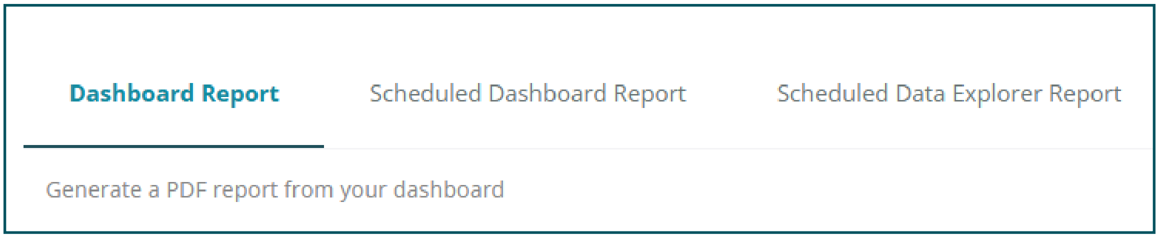


Create a Report

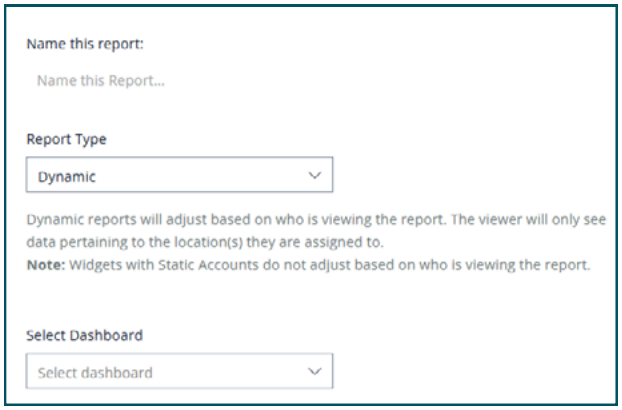
On the **Reports** page,

1. Click the plus icon in the upper right corner to launch the **Report** window.
2. Choose to create a **Dashboard Report** or a **Scheduled Dashboard Report**.

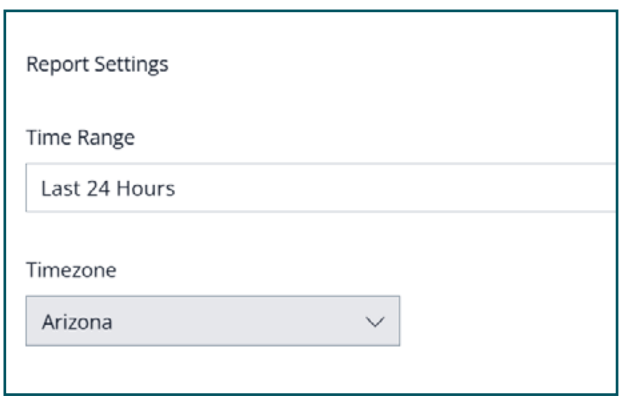
Create a Dashboard Report



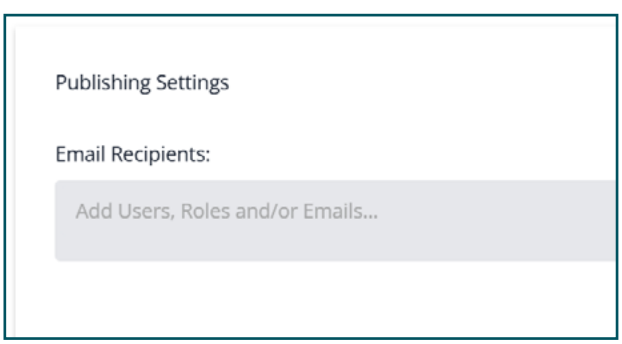
This creates a PDF report for a specific dashboard.



1. Name the report.
2. Select the **Report Type**.
   - **Standard**: The report is the same for all viewers.
   - **Dynamic**: Adjusts based on who is viewing the report. The viewer only sees the data pertaining to the location(s) they are assigned.
     - Dashboard widgets with Static Accounts do not adjust.
3. Select the dashboard to pull the report from.

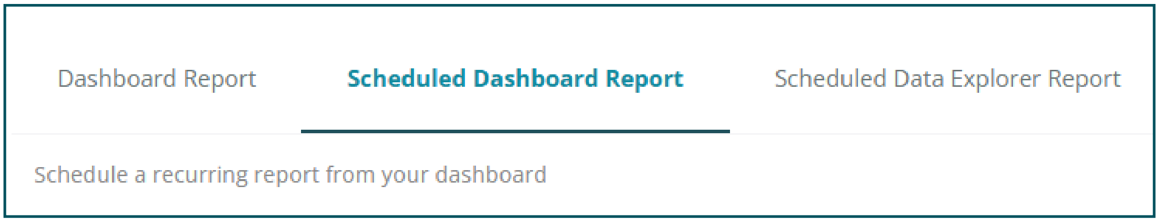


4. Set the time range for the report to pull from.
5. Select a time zone.

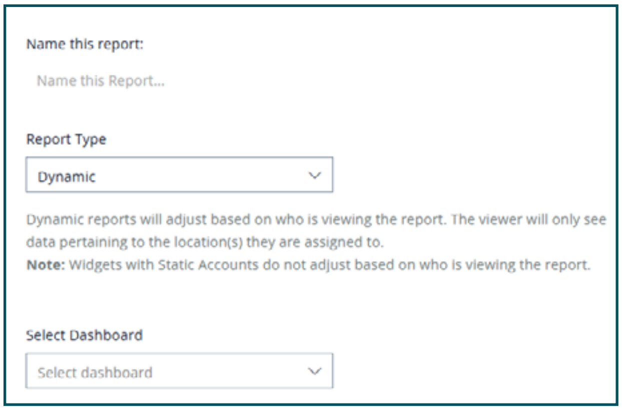


6. Add the users, roles, and/or emails of the people who will receive the report.
7. Click **Create Report**.

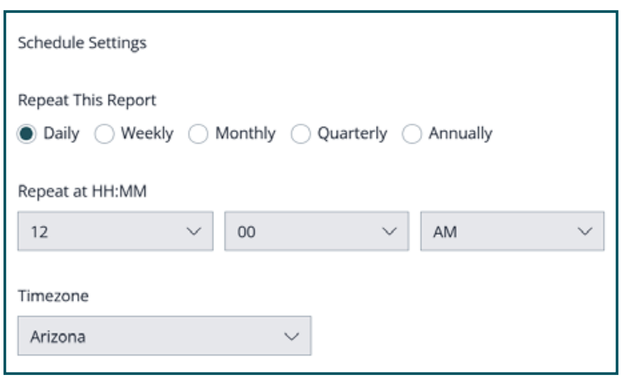
Create a Scheduled Dashboard Report



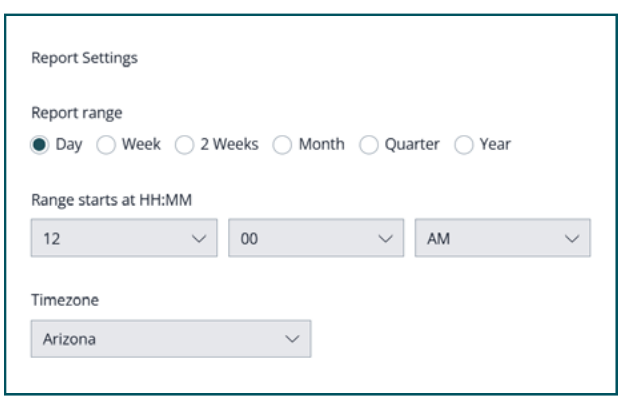
This creates a recurring PDF for a specific dashboard.



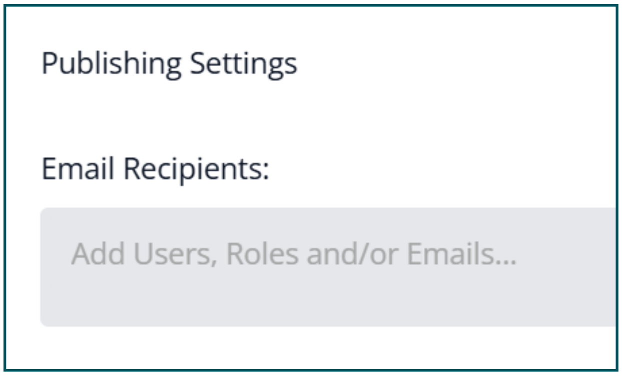
1. Name the report.
2. Select the **Report Type**.
   - **Standard**: The report is the same for all viewers.
   - **Dynamic**: Adjusts based on who is viewing the report. The viewer only sees the data pertaining to the location(s) they are assigned.
     - Dashboard widgets with Static Accounts do not adjust.
3. Select the dashboard to pull the report from.



4. Schedule the recurring report.
   a. Select the frequency of the report.
   b. Set the hour the report will be sent.
   c. Choose the time zone.

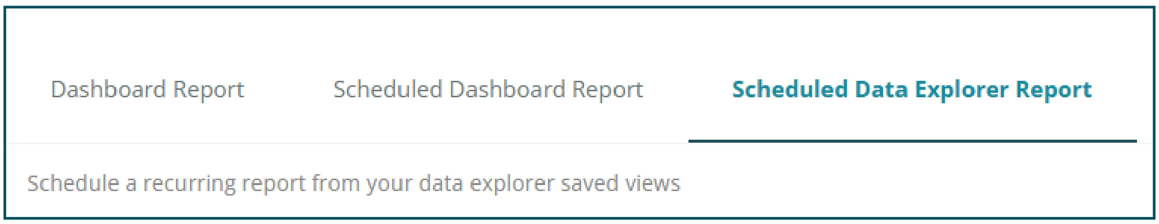


5. Set the report timeframe.
   a. Select the date range for the information pulled for the report.
   b. Set the time the range starts.
   c. Choose the time zone.

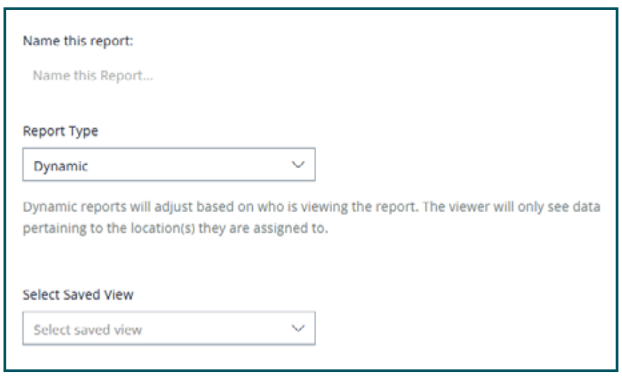


6. Add the users, roles, and/or emails of the people who will receive the report.
7. Click **Create Schedule**.

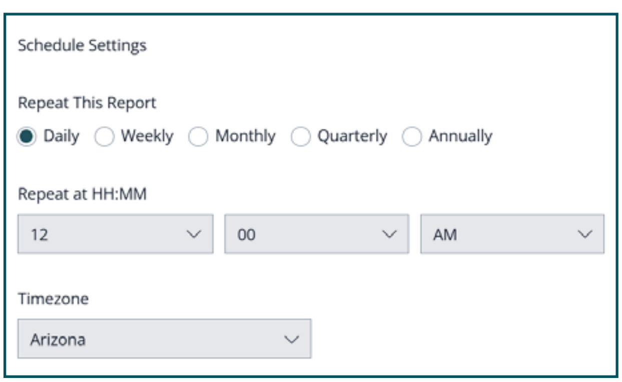
Create a Scheduled Data Explorer Report



This creates a report for the Data Explorer.



1. Name the report.
2. Select the **Report Type**.
    - **Standard**: The report is the same for all viewers.
    - **Dynamic**: Adjusts based on who is viewing the report. The viewer only sees the data pertaining to the location(s) they are assigned.
3. Select a saved view from Data Explorer to pull the report from.
    - For more information about saved views, see Saved Views on page 39.

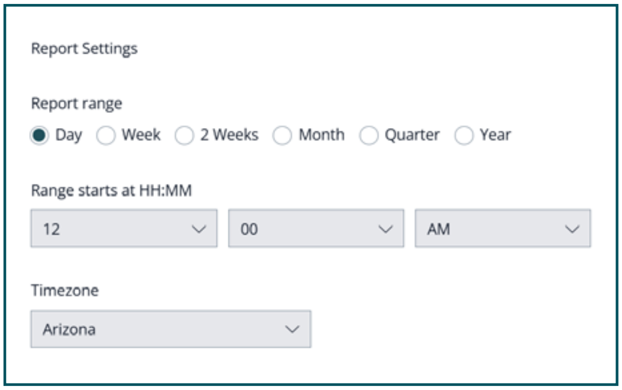


4. Schedule the recurring report.

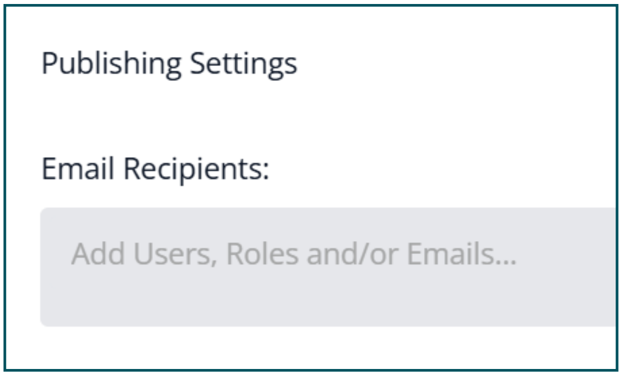
    a. Select the frequency of the report.

    b. Set the hour the report will be sent.

    c. Choose the time zone.



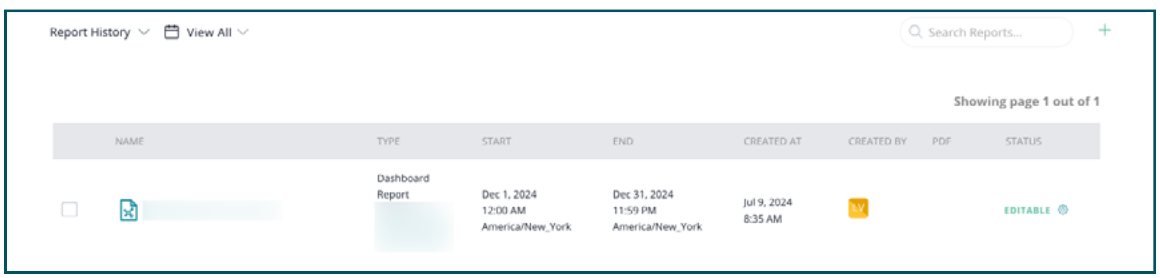
5. Set the report timeframe.
    a. Select the date range for the information pulled for the report.
    b. Set the time the range starts.
    c. Choose the time zone.



6. Add the users, roles, and/or emails of the people who will receive the report.
7. Click **Create Schedule**.

View the Report History

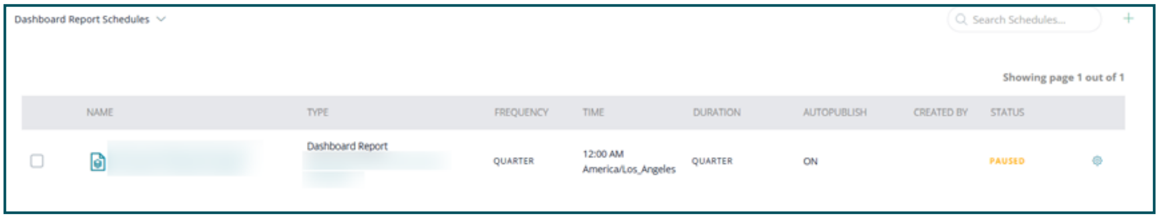
On the **Reports** page, the **Report History** view displays a list of the current active reports.



- **Name**: The name of the report.
- **Type**: The type of report.
- **Start**: The time the data of the report begins.
- **End**: The time the data of the report ends.
- **Created At**: The day the report was created.
- **Created By**: The person who created the report.
- **PDF**: A link to the PDF.
- **Status**: The report is active or paused.

View the Dashboard Report Schedules

On the **Reports** page, the Dashboard Report Schedules displays a list of all the scheduled reports.



- **Name**: The name of the report.
- **Type**: The type of report.
- **Frequency**: The frequency the report is sent.
- **Time**: The time of day the report is sent.
- **Duration**: How long the recurrence for the report is.
- **Autopublish**: If the report is scheduled to be sent out automatically.
- **Created by**: Who the report was created by.
- **Status**: The report is active or paused.

Edit Reports

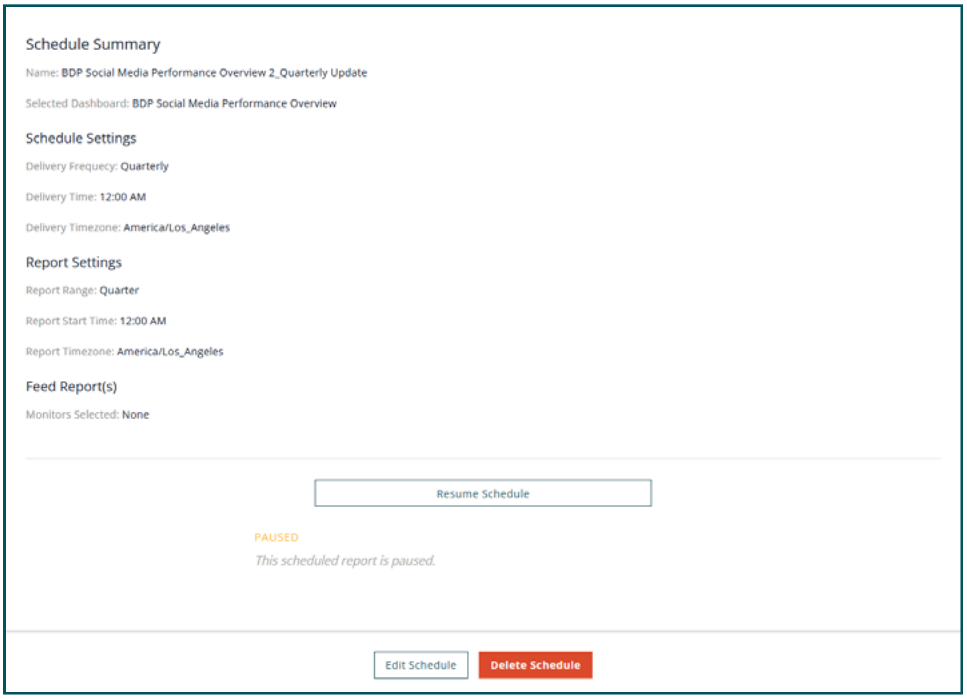
Easily add or remove recipients, change the cadence of a report schedule, and update the date range to report on.

From the **Reports** page,

1. Click the gear icon:
    a. Click **View Report** to confirm the report is capturing the correct data.
    b. Click **Rerun Report** to reflect the updated settings or any changes in the underlying data.
    c. Click **Publish Report** so others can see it.
    d. Click **Edit Report** to change any/all settings, add or remove recipients, and more.
    e. Click **Delete Report** if/when it is no longer needed.

From the **Dashboard Report Schedules** page,

1. Click the gear icon:
    a. Scroll to the bottom of the page to **Pause** or **Resume** the schedule.
    b. Click **Edit Schedule** to edit the name of the report, and the schedule, report, and publishing settings.
    c. Click **Delete Schedule** to delete the report from the schedule.



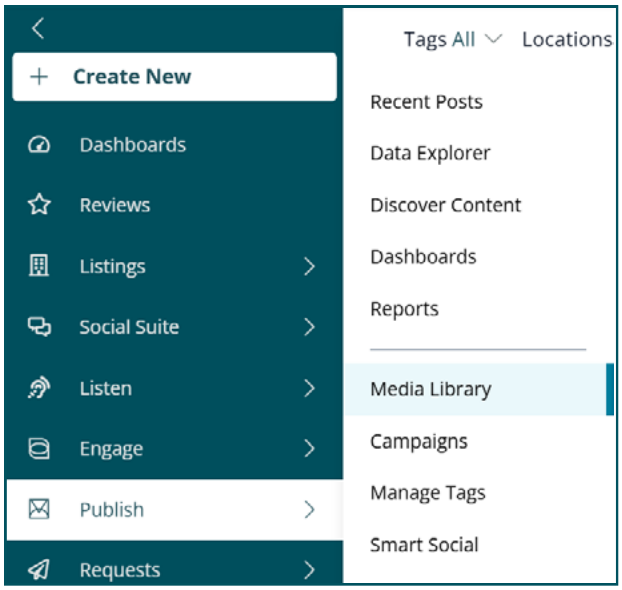
9 | Media Library

Media Library

The **Media Library** is home to creative assets like images and videos, and it is the perfect place to create fresh social content.

Upload, save, and categorize design elements to use in current or future social posts.

Getting Started



1. From the left side menu, go to **Publish** > **Media Library**.

Add Media

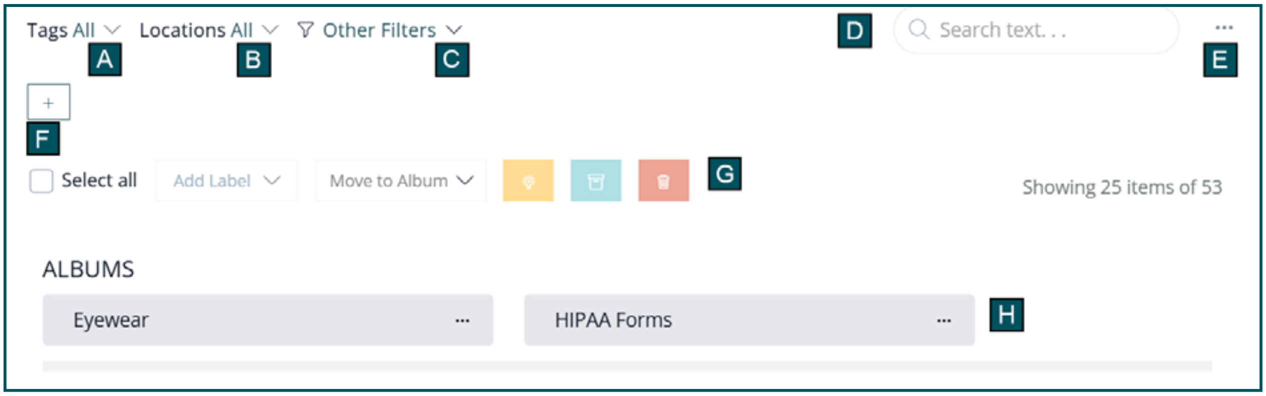
Add photos, videos, and other creative assets by dragging and dropping or uploading a file.

To upload a file:

1. From the **Media Library** page, click the upload icon in the first gray box or click the ellipsis in the upper right corner.
2. Click **Add Media**.
3. Include the details to organize the new media.
    - **Add a file**: Drag-and-drop or click to upload the file.
    - **Add text or link**: Include draft copy or text snippets, links to articles, blog posts, or other websites.
    - **Add tags**: Remember to include a tag (or tags) to categorize the media and make for easy searching.
    - **Add access**: Decide to share this media with some, all, or none of your locations
    - **Add media**: Save and store this media in the **Media Library**.

Filter and Sort

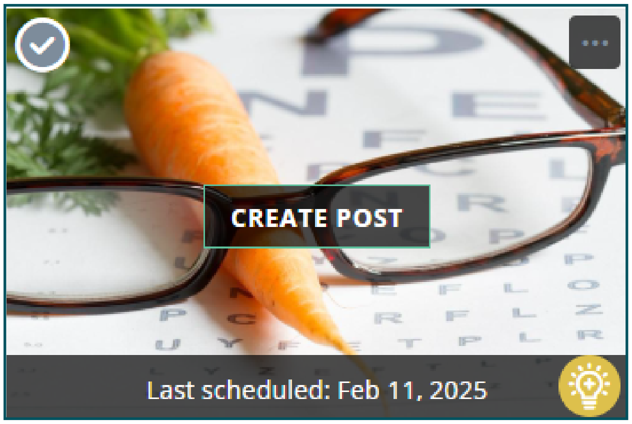
Use the top-line filters to quickly sort the assets.



	Filters	Description
A	Tags	Sort media by adding or creating tags. See Manage Tags on page 78 for more information.
B	Locations	Select the specific locations to see the assigned media for that location.
C	Other	• **Source**: Filter by where the media originated from. • **Type**: Filter by images, videos, or text. • **Usage**: Sort by the media that has been used, unused, or designated for smart social. See Smart Social on page 83 for more information. • **Category**: View only the media designated for smart social. • **Status**: Differentiate between active and archived media.
D	Search	Use a keyword to search the media.
E	Ellipsis	Click the ellipsis to create an album, add media, or start a new post.
F	Custom Attribute	Add a secondary filter for brand, city, location, location type, state, or zone.
G	Sort Media	Select specific media or click select all to add tags, move into an album, apply to smart social, archive, or delete.
H	Albums	Create albums to sort media or edit the albums to add access permissions.

Media Library Actions

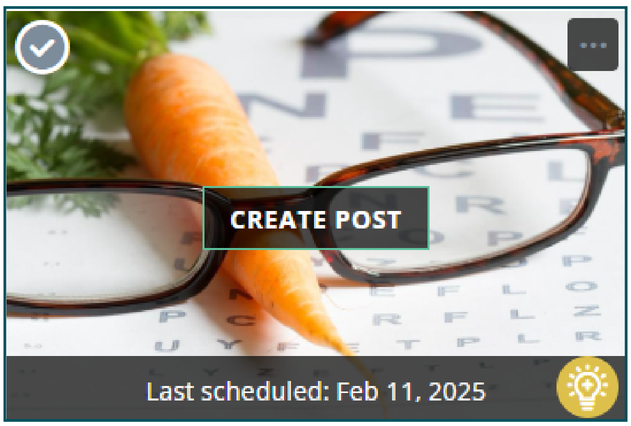
In the media library, edit, organize, and create posts with your media.



1. Hover over the thumbnail image to see the thumbnail options

Create a Post

To create a post from the Media Library,

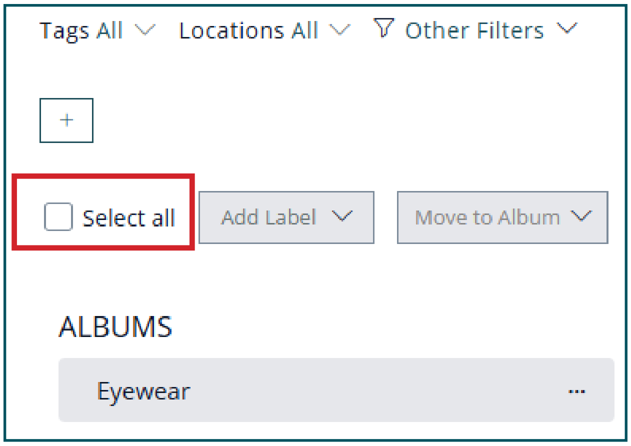


1. Click **Create Post**.
   - When creating a post from a specific image or video, the platform automatically adds that asset to the post.
   - For more details on creating social posts, see Create a Post on page 14.

Bulk Sort

To select individual assets, click the light green check in the top left corner of the thumbnail image.

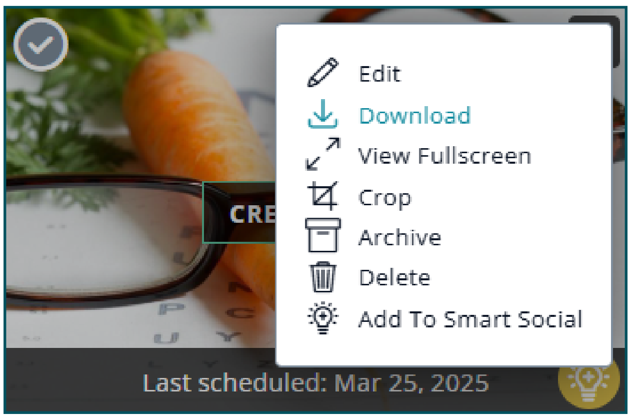
It changes to dark green, indicating it is selected. It is now possible to add a tag (or tags), archive, or delete this file.



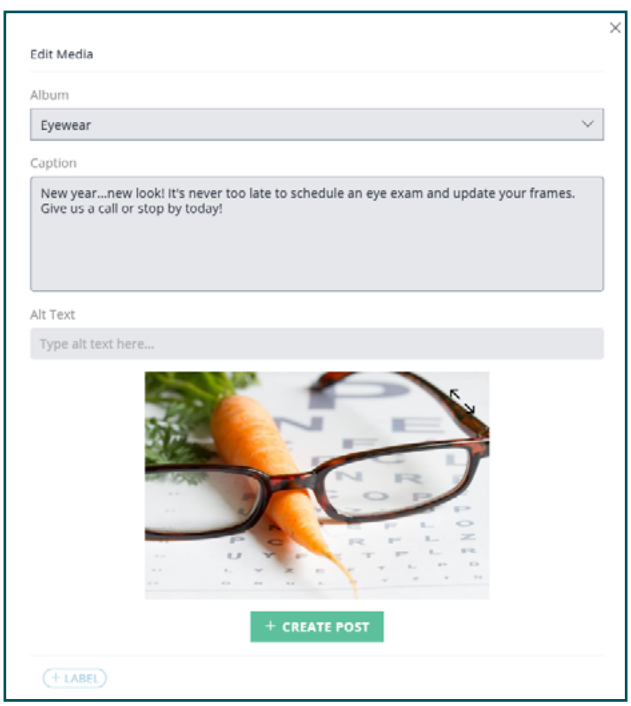
To make changes to all assets in the Media Library, click **Select All** in the top left corner.

A dark green check mark indicates all assets have been selected. Then add a tag (or tags), archive, or delete all files in bulk.

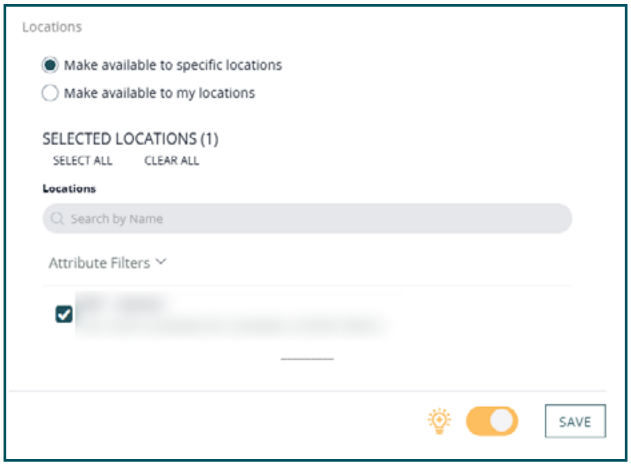
Edit



1. Click the ellipsis in the top right corner and select **Edit**.

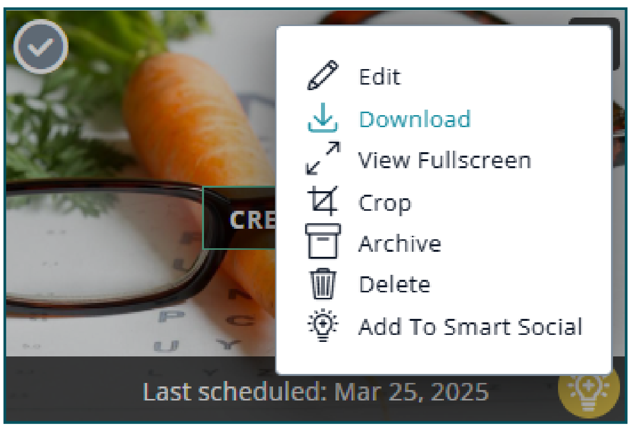


2. Assign the media to an album.
3. Add or edit the caption.
   - This caption is used as the text for the post.
4. Add or edit the alternate text.
   - This text can be read by a screen reader for accessibility purposes.
5. (Optional) View the image in full screen, or create another post with the same image.
6. Click **+Label** to add a tag.



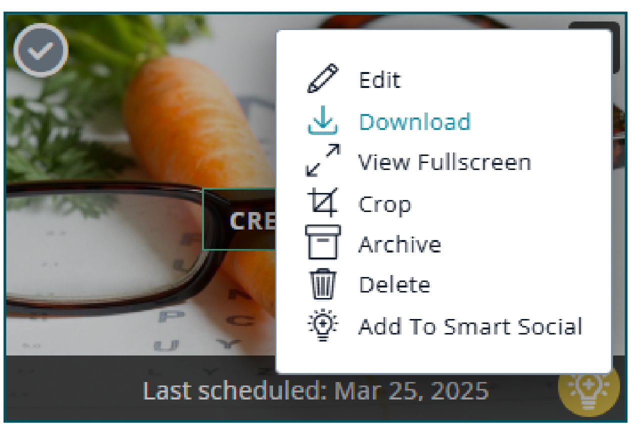
7. Select the location access.
    a. To give specific locations access, search for the location and click the check box to add it to the list.
    b. Add the secondary attribute filters to narrow the search.
8. Click the yellow radio button to add the image to Smart Social, if needed.
    - For more information, see Smart Social on page 83.
9. Click **Save**.

Download

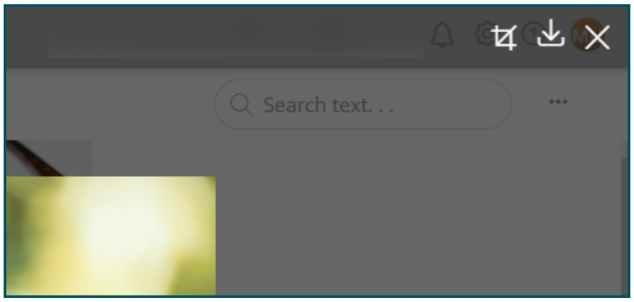


1. Click the ellipsis in the top right corner and select **Download**.

View Fullscreen

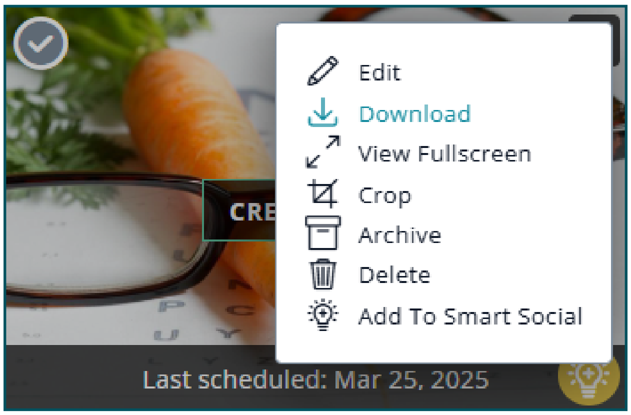


1. Click the ellipsis in the top right corner and select **View Fullscreen**.

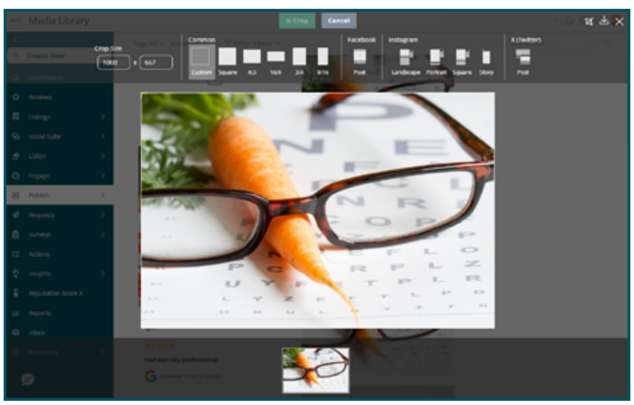


2. Click the crop icon in the upper right corner to crop the image.
3. Click the download icon to download the image.

Crop

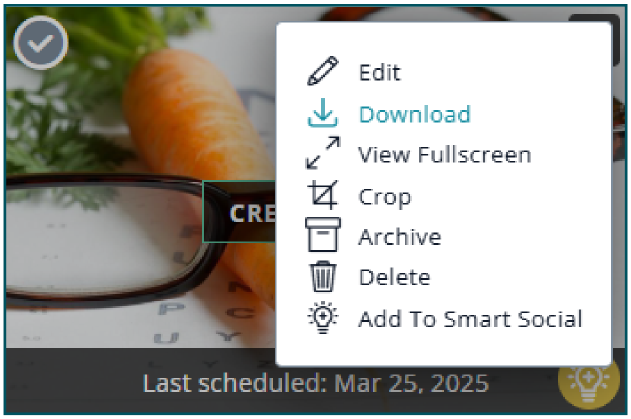


1. Click the ellipsis in the top right corner and select **Crop**.



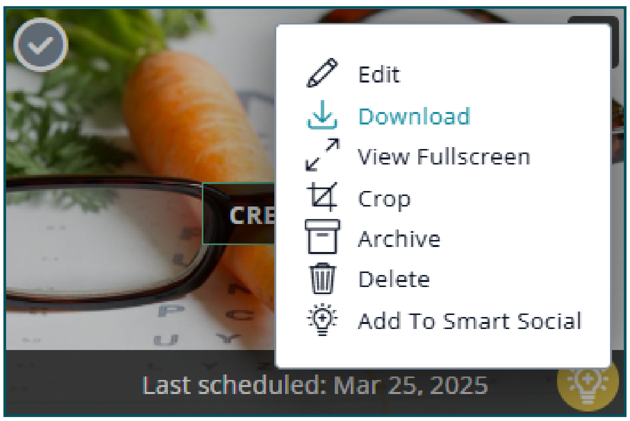
2. Adjust the image size and aspect ratio to ensure the content displays correctly and effectively across networks like Facebook, Instagram, and X.
   - The cropping options are tailored to each platform's specific needs. It is possible to format posts for landscape, portrait, square, and other formats without compromising the visual quality.

Archive



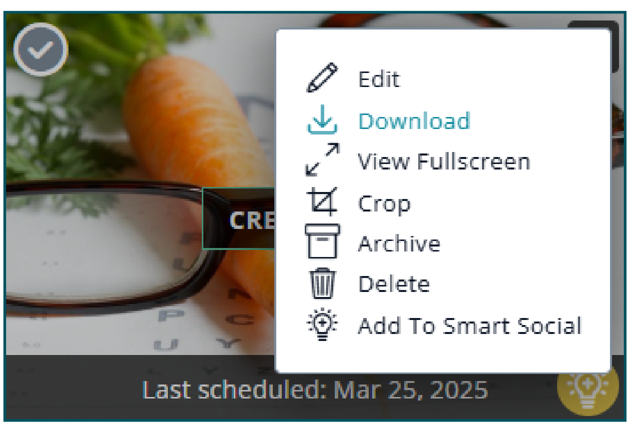
1. Click the ellipsis in the top right corner and select **Archive**.
   - The media moves to the archive.
2. To remove the media from the archive,
   a. Use the **Other** > **Status** filter to go to the archived media.
   b. Find the correct media and click the ellipsis in the top right corner.
   c. Select **Restore from Archive**.

Delete



1. Click the ellipsis in the top right corner and select **Delete**.
   - The media is deleted from the library.

Add to Smart Social



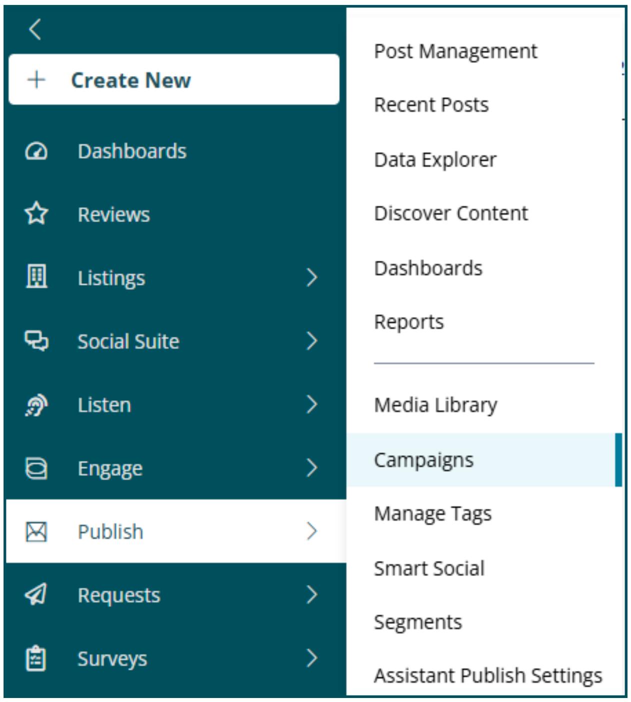
1. Click the ellipsis in the top right corner and select **Add to Smart Social**.
   - The media is included in the options available for smart social indicated by the yellow icon in the lower right corner.
   - For more information on using Smart Social, see Smart Social on page 83.

10 | Campaigns

Campaigns

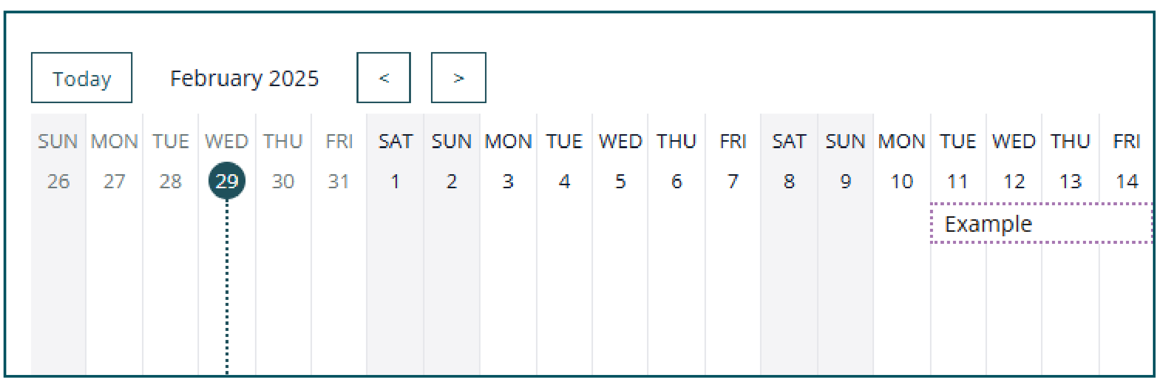
The **Campaigns** page is a place to create and maintain social media campaigns. When a campaign is created, use the subscription option to share campaigns with one or more business locations.

Getting Started



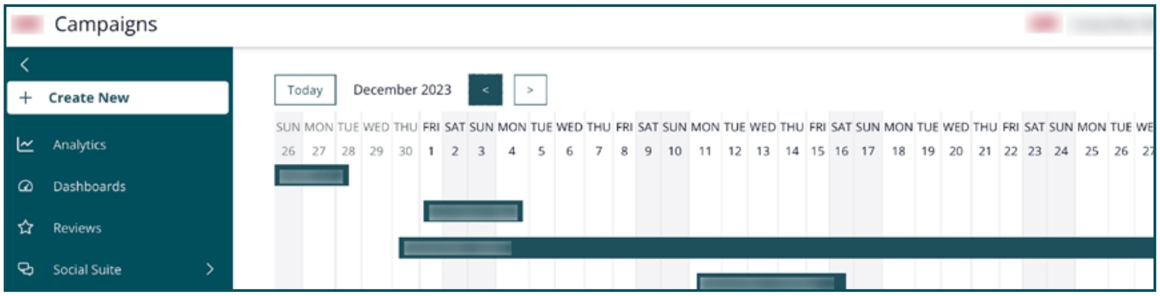
1. Go to **Publish** > **Campaigns**.

- The campaigns calendar displays the current month, with each day represented as a column. The current day is marked with a solid blue circle and dotted line.



- Use the arrows at the top of the calendar to switch between months to see previous and future campaigns.

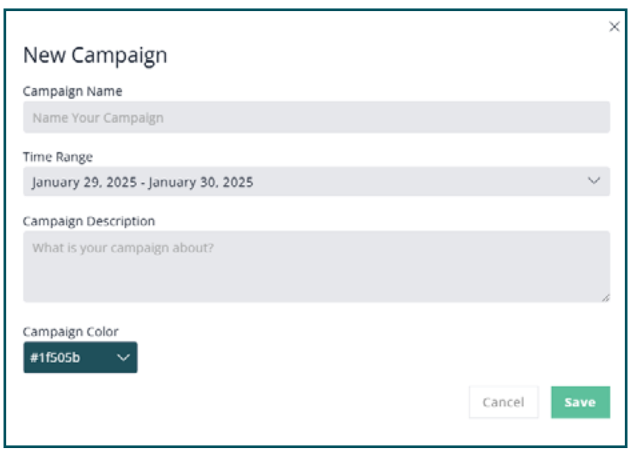
- The campaigns are shown as solid horizontal bars. Click on the bar to get more information about a specific campaign.



- Click **New Campaign** to create a new campaign.

Create a New Campaign

1. Click **New Campaign** in the top right corner.



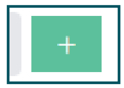
2. Enter a name for the campaign.
3. Select a start and end date for the campaign.
4. Add a description about the campaign.
5. Select a color to designate to the campaign in the calendar.
6. Click **Save**.
   - The campaign appears as a bar made of dotted lines in the calendar. This indicates the campaign is inactive.
   - Edit the campaign to add posts and then activate it.

Edit a Campaign

1. Click the campaign bar on the calendar.
   - The campaign details display.
2. Click the pencil icon to edit the campaign name, date, or description.
3. Create or edit posts.

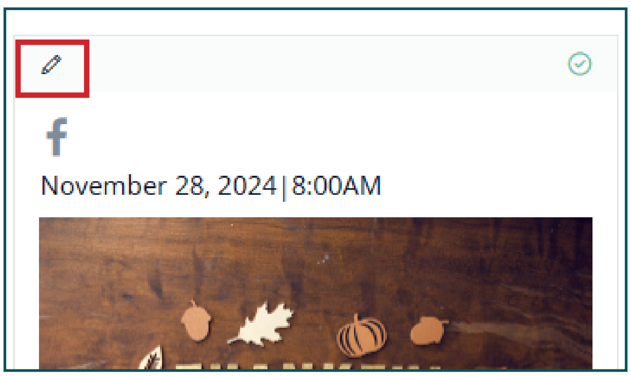
   a. In a newly created campaign, click +**Post** to create posts for the campaign.

   b. While editing a previous campaign, click the green plus in the upper right corner.

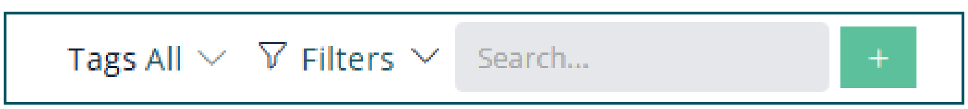
   

   ○ See Create a Post on page 14 for more information on how to create posts.

4. Use the pencil icon in the left corner to edit the individual posts.



5. Use the tags and filters to sort through the posts of the campaign.

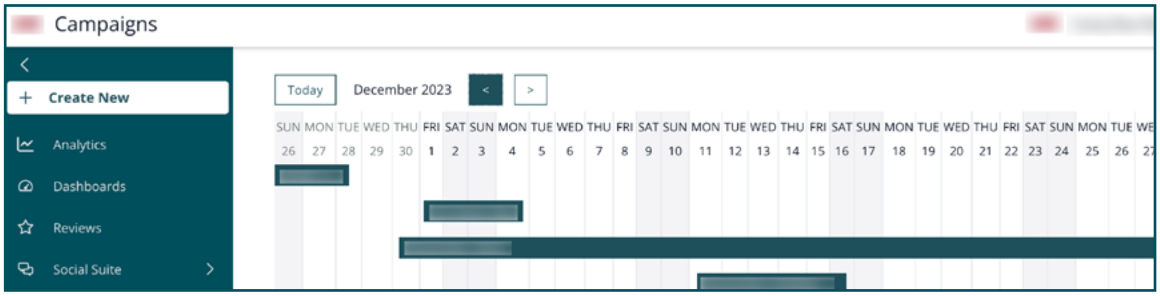


   - Select a tag or create a new tag. For more information, see Manage Tags on page 78.
   - Filter by Network (Facebook, Instagram, etc.) or Status (Draft, Scheduled, etc.).
6. When the campaign is ready, click **Inactive** to activate the campaign.

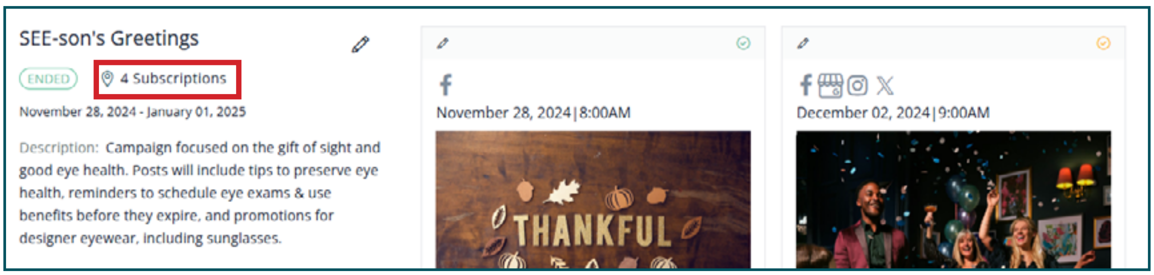
Set Up Campaign Subscriptions

After a campaign has been created and activated, set up the campaign subscriptions to send the campaign to specific business locations to post on their individual social media accounts.

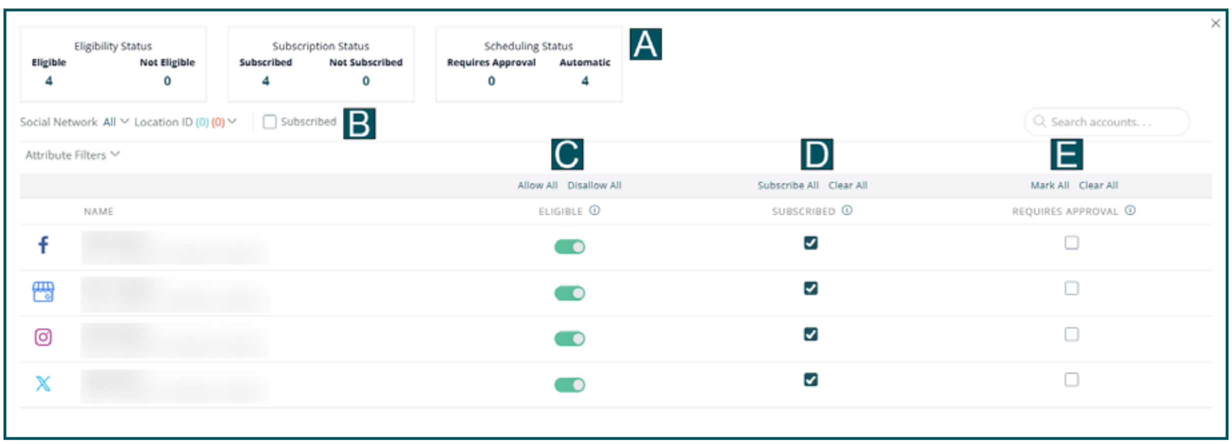
1. Select the campaign to send out.



2. Click on the subscriptions count.



- The subscription chart displays.



A	Subscription Count	The subscription count displays how many social accounts are eligible for the campaign, subscribed to the campaign, and require approval.
B	Filters	Filter the chart by social network, business location, attributes, or subscription. Use the search bar to search for a specific account.

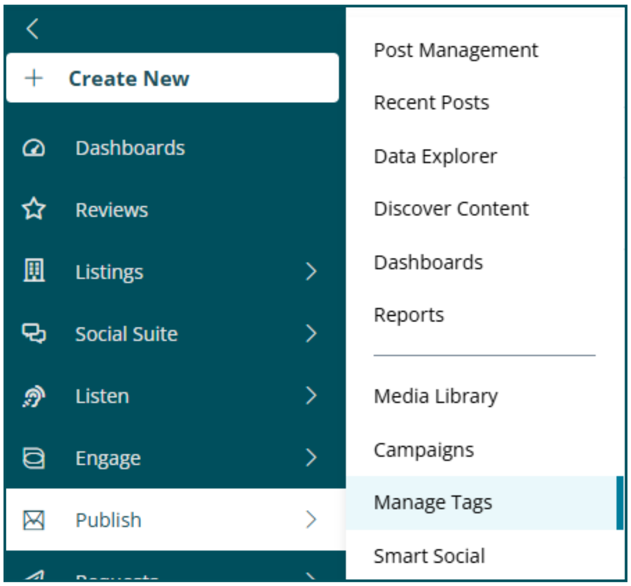
C	Eligible	Use the radio button in this column to turn on the eligibility for an account. • If a social account is eligible, a user with access to the location can see and subscribe to the campaign. The users are sent an email when the campaign is set to active.
D	Subscribed	Click the check box in this column to subscribe to a campaign for an account. • If a social account is subscribed to a campaign, any scheduled post will post on that account at the set time.
E	Requires Approval	Click the check box in the column to approve campaign posts before they are posted for an account. • If a social account requires approval, a user with access to that social account must click **Approve** for each post in the campaign before the post is scheduled to publish. If the content is not approved before the publish date/time, it will not publish on that social account. • This feature is meant to give locations more autonomy in what is posted on their accounts.

11 | Manage Tags

Manage Tags

Use tags to categorize content by brand, location, type, theme, or other relevant topic. Each tag has a unique color. Tags can be used to flag and organize scheduled and drafted posts. Tags are shared across every page of the platform.

Getting Started



1. Go to **Publish** > **Manage Tags**.

- **Tags**: Click the green plus to create a new tag or new tag group.
- **Groups**: Organize tags by common themes, events, or other meaningful categories (i.e., Holidays, Staff Recognition, Spring Sale).
- **Unsorted**: Tags that have not been sorted into groups.
    - Tags must be sorted into groups when they are created or they will be in the Unsorted category.

Available Tags

Use tags through several of the Publish pages:

- Post Management:
    - Top-line tags filter for the calendar.
    - Tags for individual posts displayed in the calendar.
    - Add or remove tags to posts in the Workflow.
    - Add or remove tags to posts in the Tasks list.
- Recent Posts
    - Top-line tags filter for the recent posts.
    - Tags for individual posts displayed in the queue.
    - Apply tags in bulk to the posts in the queue.
- Media Library
    - Top-line tags filter for media.
    - Tags for individual media thumbnails.
    - Apply tags in bulk to the media in the media library.

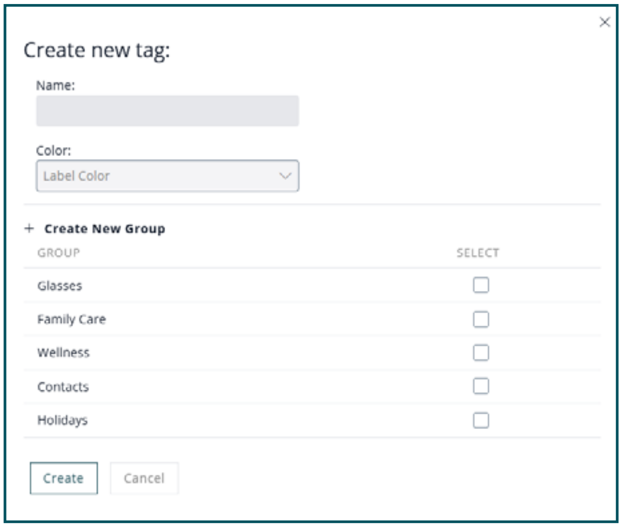
Top-line Filter Tags

To create a tag with the Tags filter at the top of the page,

1. Click the **Tags** drop-down.
2. Click **Create New Tag**.

- If the tag has already been created, search for the tag in the search bar.

3. Name the tag and select a color to assign it.
    - If this tag belongs in a group, select the correct group to add it to, or click **Create New Group**.

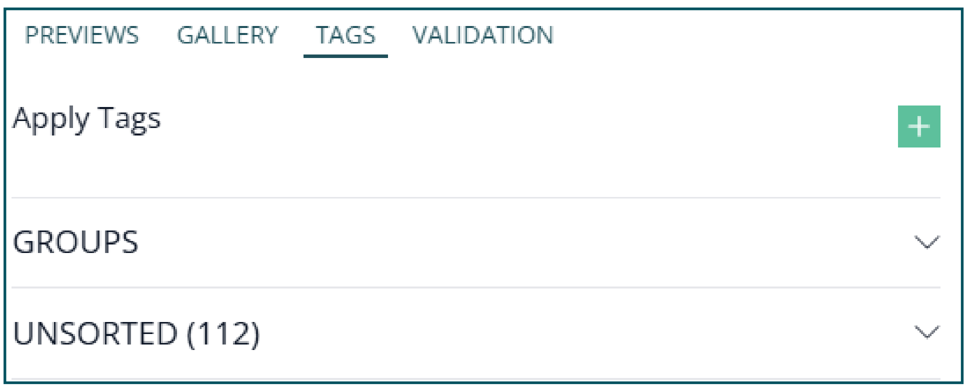


4. Click **Create**.

Individual Tags for Posts

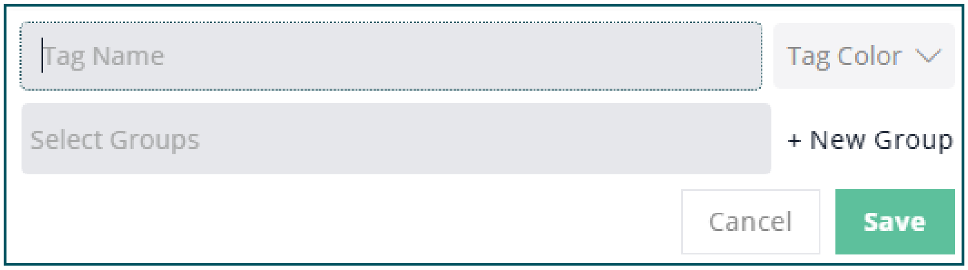
To create a tag for a specific post,

1. Open the post to tag.
2. Click the **Tags** tab.



3. Click the green plus icon on the right and select **New Tag** or **New Tag Group**.
    - **New Tag**: Create an individual tag for the post.
    - **New Tag Group**: Create a group for several tags and easy organization.

4. Name the tag and select a color to assign to it.



- If needed, select a group for the tag or create a new group.

5. Click **Save**.

Bulk Tags

To apply—or remove—one or more tags from multiple published posts,

1. Under **Publish** > **Recent Posts**, click the box in the top left corner of each post to tag.
   - A check mark indicates it has been selected.
2. Choose the tag(s) to add or remove.
3. Click **Add to Posts** or **Remove from Posts**.
4. Click **Done**.
   - Tag(s) are added to—or removed from—the selected posts.

12 | Smart Social

Smart Social

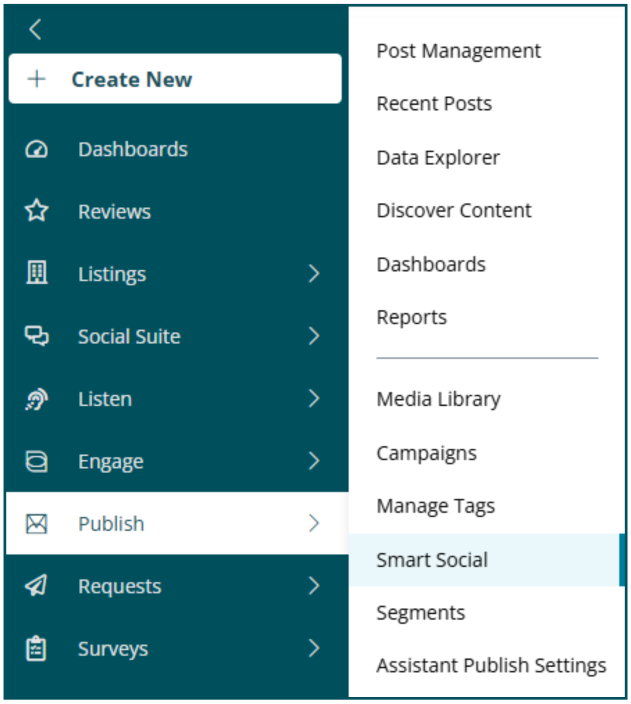
Smart Social automates content posting by scheduling a set number of posts per week over a specific time frame.

Example

Select multiple assets from the media library and set Smart Social to automatically generate 10 posts per week.

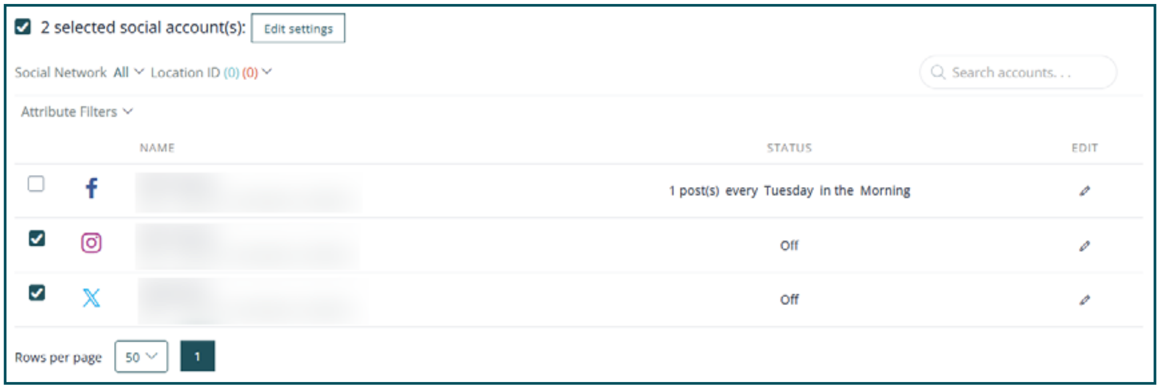
Smart Social runs once per week on Friday at 1 a.m. UTC. At that time, existing media is evaluated and new posts are scheduled for the next three weeks according to the defined rules. If too many posts are scheduled, Smart Social reduces them down to the correct number per week. If too few posts are scheduled (or none at all), Smart Social adds new posts at random times to fill in the week.

Getting Started

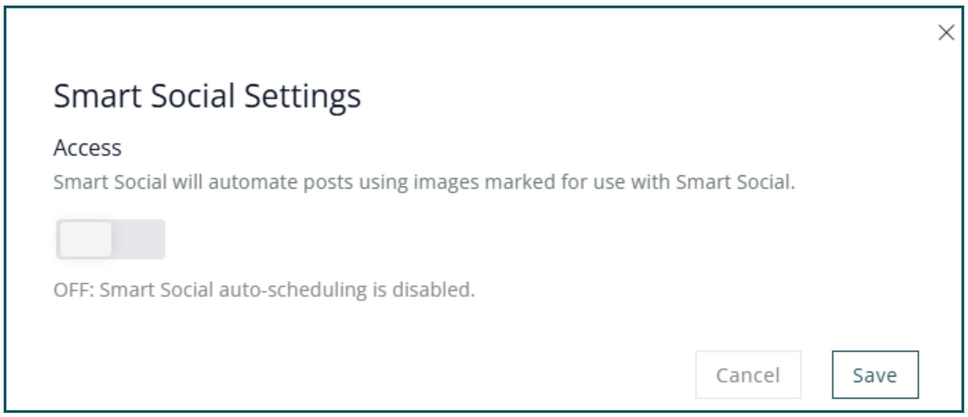


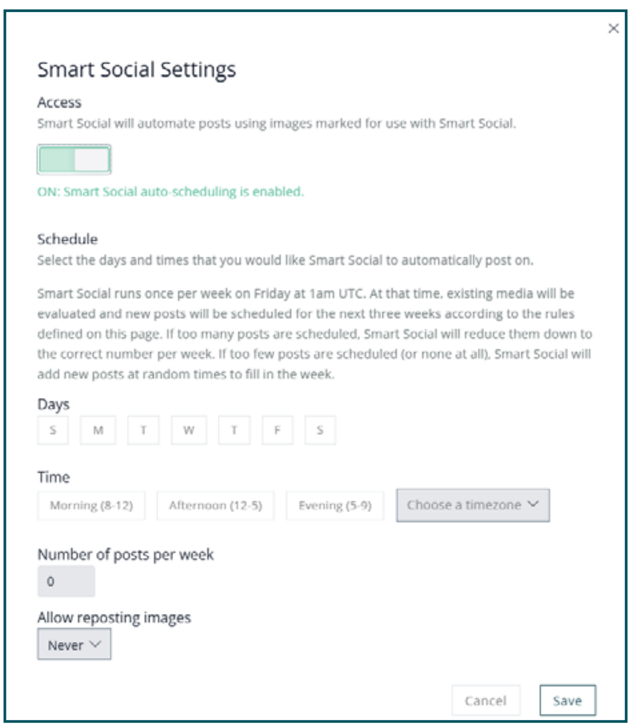
1. Go to **Publish** > **Smart Social**.

2. Select the accounts to set up Smart Social for.



3. Click **Edit Settings**.
4. In the **Smart Social Settings** dialog box, click the button to toggle it on.





5. Schedule the number of posts per week.
   a. Select the days the to post content.
   b. Select the time frame and timezone for the posts.
   c. Enter the number of posts per week.
   d. Choose if the images can be reposted after they have all been used or if images should never be reused.
6. Click **Save**.

Smart Social pulls the images that are designated as Smart Social in the Media Library. For more information about assigning Smart Social in the Media Library, see Add to Smart Social on page 70.

Choose Content

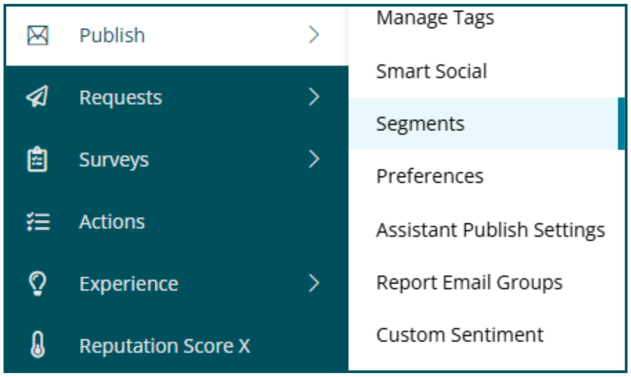
This is done from the Media Library. For more information, see Edit on page 67.

1. Go to **Publish** > **Media Library**.
2. On the media, click the ellipsis in the top right corner and select **Edit**.
3. To enable the media for use with Smart Social, caption the media. This caption is used as the body text of the post.
4. Toggle to enable Smart Social for the media.
5. Click **Save**.

13 | Segments

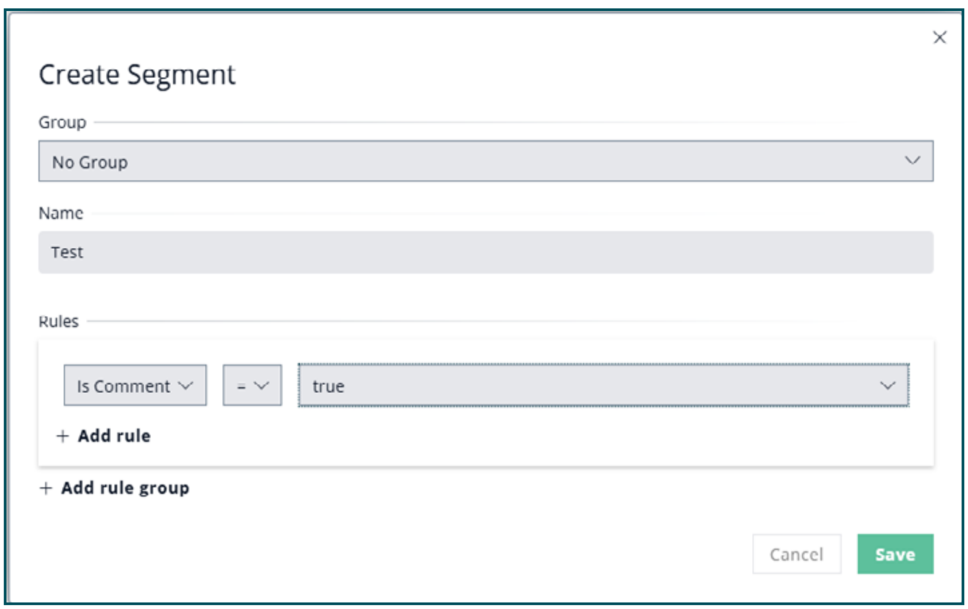
Segments

Use segments to create specific filter groups. These groups can be defined by specifics of a post and rules for when those specifics occur. This adds extra filtering options to dashboards, providing additional views for deeper analysis of post data.



1. Go to **Publish** > **Segments**.

2. Click **Add New Segment**.
3. Name the segment.
4. Click **Add rule group** to add a conditional rule to the segment.
5. Add additional conditional rules if needed by clicking **Add rule**.



6. Click **Add rule group** to add an OR conditional rule.
7. Click **Save**.

   - The segment displays.

Apply a Segment

To use the segment,

1. Go to **Publish** > **Dashboards**.
2. Click a dashboard title to open it.
3. Click the Segments filter at the top of the page.
4. Find the Segment and select it.

14 | Publish Assistant

Publish Assistant

Some social networks do not allow publishing through web applications. Publish Assistant makes publishing to these kinds of networks easier.

About Publish Assistant

The purpose of the Publish Assistant is to help clients schedule and publish content that they cannot publish directly from the Reputation platform.

Example

You want to schedule content for a Pinterest account, but Pinterest can only natively schedule out 30 days in advance.

The Publish Assistant sends a text message containing the media and text of the post at the scheduled time. You can then copy and paste the content and publish the post.

Access Publish Assistant

1. Go to **Publish** > **Publish Assistant Settings**.
    - If the account is managed within the social products, this is labeled **Credentials**.
2. Click **+ Configure Assistant**.
3. Select the network to add the assistant.
4. Specify the account name.
5. Enter the phone number to receive the scheduled content.
6. Select the country code from the drop-down.
7. Enter the area code.
8. Click **Add Account**.

15 | Admin

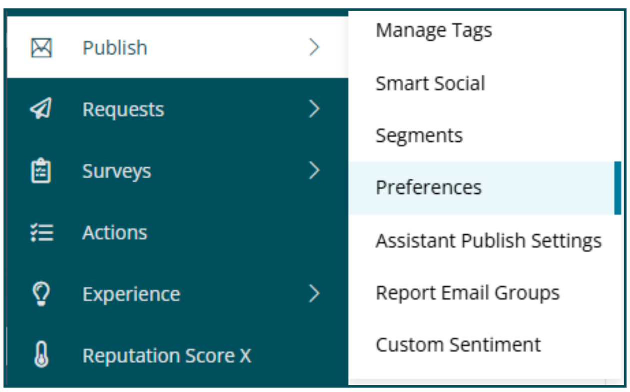
Admin

The following Publish options are only available with certain admin permissions.

- **Preferences**: Use Preferences to enable automatic saving to the media library, create RSS monitors, and set link parameters and bitly authorization.
- **Report Email Group**: Create a group of emails to easily send reports to.
- **Custom Sentiment**: Customize the criteria for the sentiments assigned to engagements.

Preferences

Publish users with admin permissions can leverage additional functionality like bit.ly links, UTM parameters, and more from the **Preferences** module.

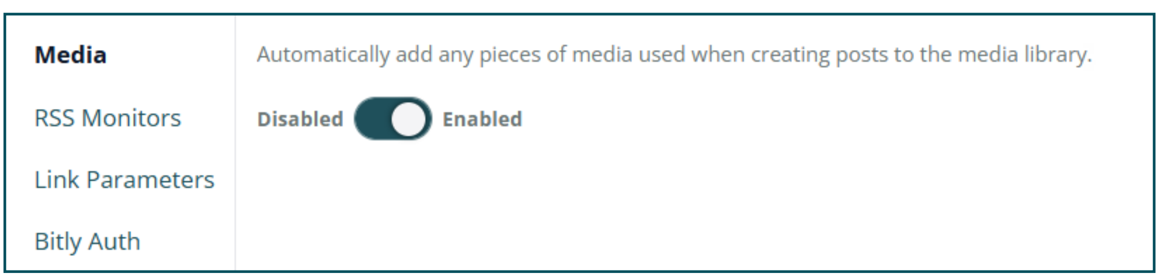


To access Preferences,

1. Go to **Publish** > **Preferences**.

Media

Enable the option to automatically add any pieces of media used when creating posts to the media library.



RSS Monitors

RSS feeds provide automatic updates about new content on a linked website. To create an RSS Monitor, find an RSS feed link and then create a monitor to add it to.

Find an RSS Feed

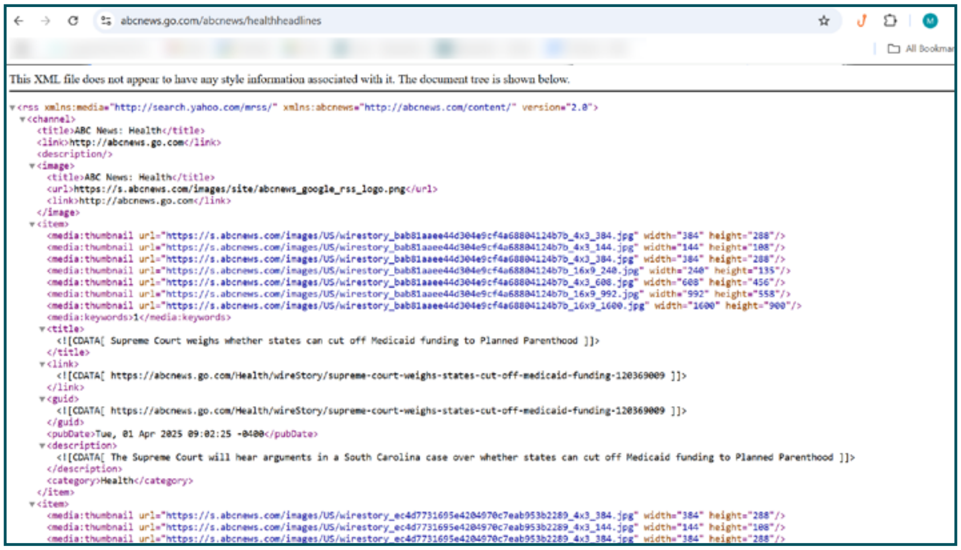
There are several ways to find an RSS feed link:

- If the website has an RSS icon at the bottom of the page, click the RSS icon to open the feed.

- Find a link to an RSS feed.

- Sometimes it is necessary to guess for the link by appending the URL with /rss or /feed.

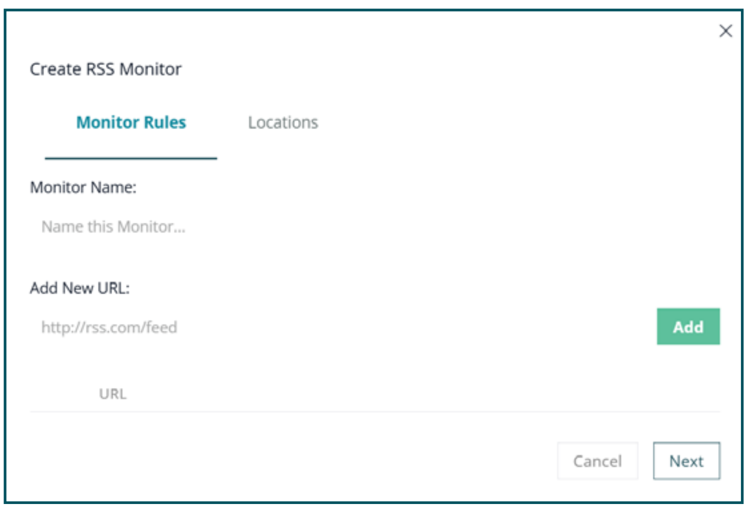
The RSS feed should look like the image below. Copy the URL for the RSS feed page to add to a monitor.



Create a Monitor

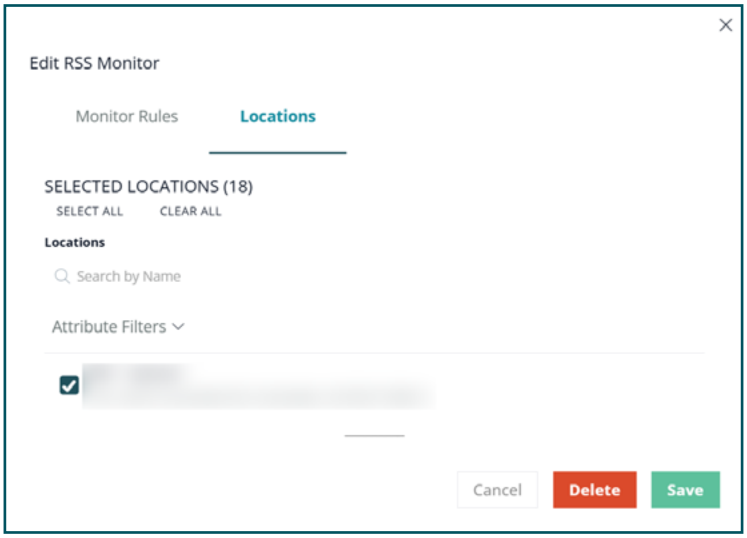
To create a monitor,

1. Click **Add Monitor**.
2. Under **Monitor Rules**, name the monitor and add the URL for the RSS feed.



3. Click **Add** to add the feed link to the monitor.
   - Add as many links as needed.

4. Click **Next**.
5. Under **Locations**, select the social accounts that can access the monitor.



6. Click **Save**.

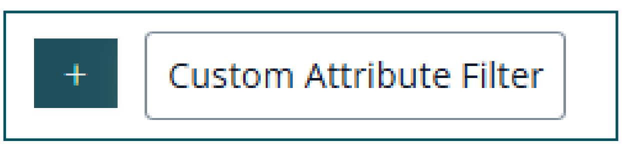
Organize Monitors

To edit or delete a monitor,

1. Use the pencil icon or the delete icon for the monitor in the far right column.

To filter the list of monitors,

1. Click the plus to add an attribute to filter the monitor list by.



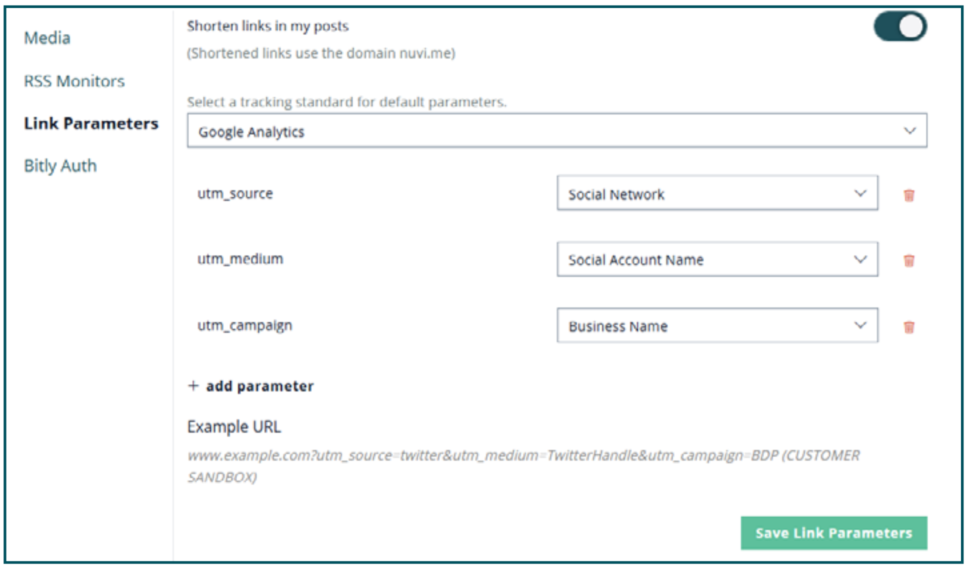
Link Parameters

Use UTMs—or tracking parameters—to measure how much traffic the social content is driving. Add the parameters here, then track the metrics in a chosen tool (e.g., Google Analytics).

When the **Shorten links in my posts** toggle is on, the platform automatically shortens the UTM URLs when the post is published.

> **Note**: The shortened link only displays in the live, published posts. The long-form URL is shown in the draft and scheduled stages.

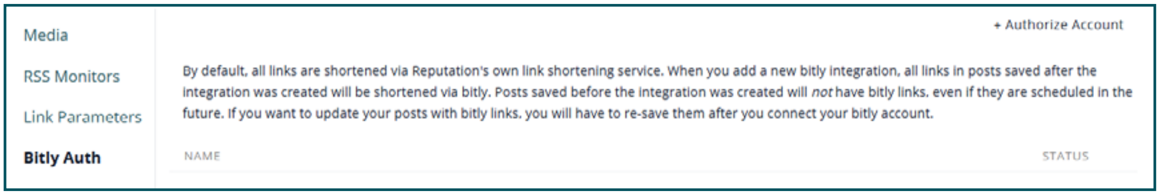
1. Click the radio button on to automatically shorten links in posts.



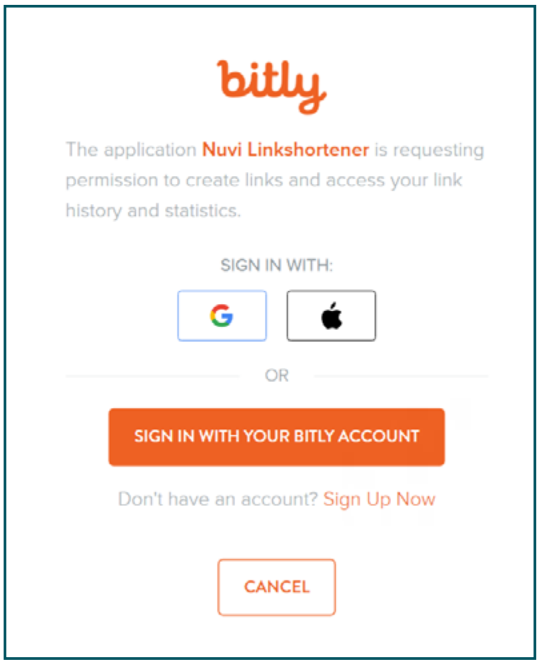
2. Use the first drop-down to select an analytics option.
   - Google Analytics
   - Adobe
   - DOMO
3. Use the subsequent drop-downs to select what will be appended to the URL for that analytics page.
4. Click **Save Link Parameters**.

Bitly Authorization

By default, all links in posts are shortened via Reputation's shortening service. To use Bitly instead, authorize a Bitly account.



1. Click **+Authorize Account**.
2. Sign in to the Bitly account.

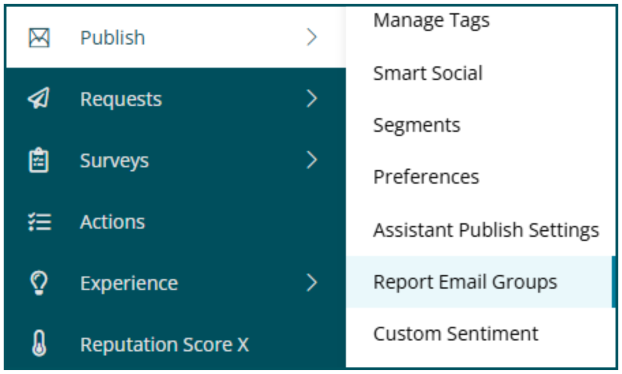


When a Bitly integration is added, all links in posts saved after the integration are shortened via Bitly. Posts saved before the integration will not have bitly links, even if they are scheduled in the future. To update posts with Bitly links, re-save them after the Bitly account is connected.

Note: When using Bitly, ensure the **Shorten links in my posts** option under Link Parameters is toggled off.

Report Email Groups

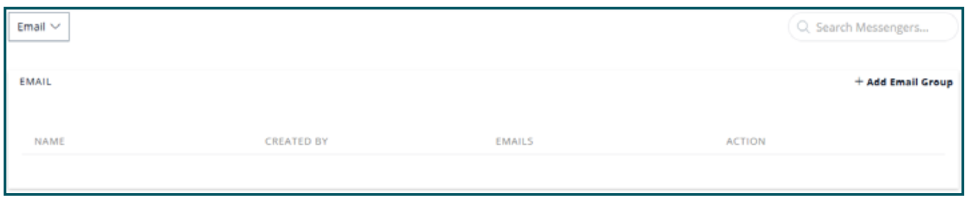
To share reports with the same people, create an email group. Email groups save the time of entering multiple email addresses for each report. Set it up once, and the platform automatically delivers the report to their inbox according to the report schedule settings.



To access **Report Email Groups**,

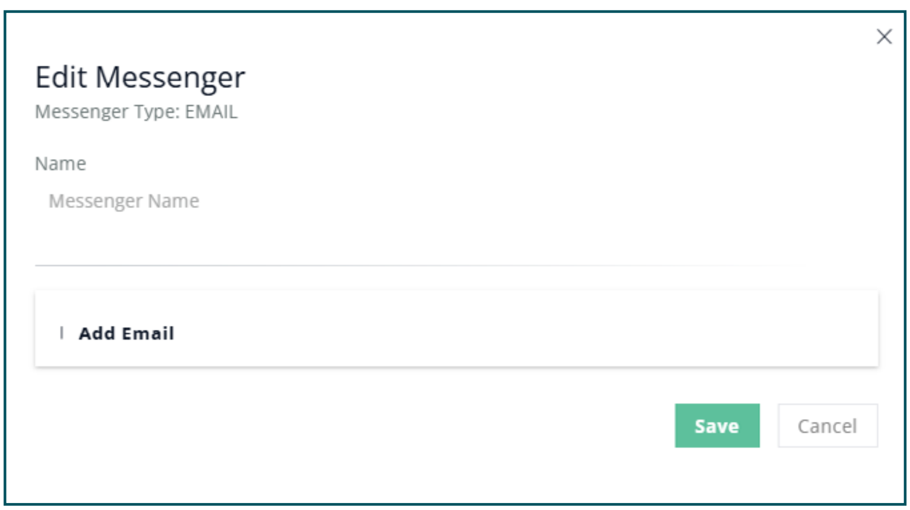
1. Go to **Publish** > **Report Email Groups**.

2. Click **Add Email Group** to enter the email addresses of those who should receive reports.



- Create as many email groups as needed. For instance, one for a direct team, one for the senior leadership team, one for the CX team, and so on. Once created, all email groups appear in the Add Email Groups drop-down when scheduling reports; simply click on the group(s) to receive the report.

3. Enter the sender's (Messenger) name.



- The **Messenger Name** can be your name, the department or team name, etc. Ensure to choose something recipients will recognize.

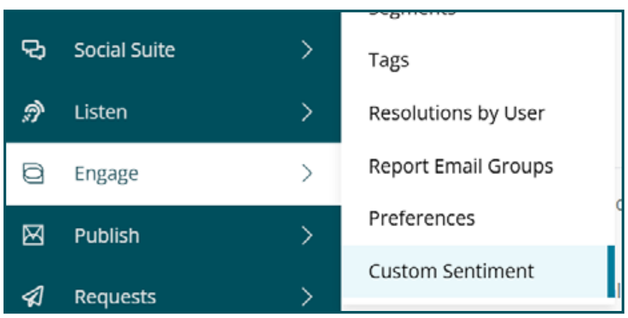
4. Add the email address(es) of the person/people to include in this group.
5. Save the email group.
6. Repeat the steps above to create as many groups as needed.

Send a Report via SMS or Slack

1. In the top right corner of the Email Groups window, select SMS or Slack instead of Email and follow the steps listed above, adding phone numbers or workspaces instead of email addresses.

Custom Sentiment

The **Custom Sentiment** page provides customization for the sentiments assigned to engagements.



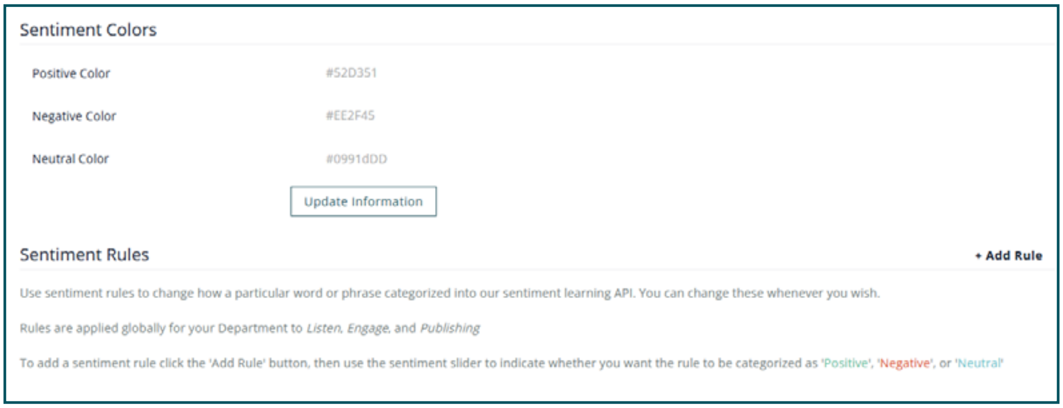
To access **Custom Sentiment**,

1. Go to **Engage** > **Custom Sentiment**.

Sentiment Colors

By default, a positive sentiment is green, a neutral sentiment is blue, and a negative sentiment is red.

Click **Update Information** to change the colors for a positive, negative, or neutral sentiments.



Sentiment Rules

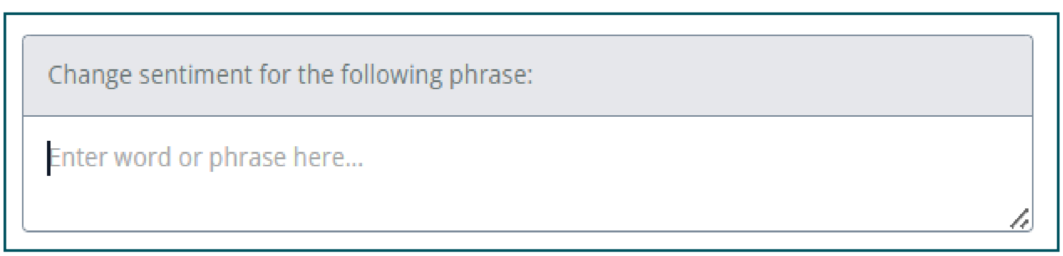
Sentiments for engagements are automatically assigned depending on the words used in the message. Create custom rules for specific words to trigger certain sentiments.

These rules apply globally for Listen, Engage, and Publish.

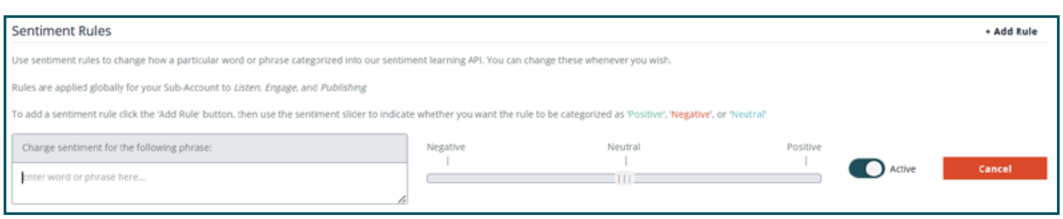
To add a sentiment rule,

1. Click **Add Rule**.

2. Enter a word to create a rule for the sentiment.



3. Use the sentiment slider to indicate if the word should be categorized as Positive, Negative, or Neutral.



4. Click **Create**.

16 | Premium Paid Services

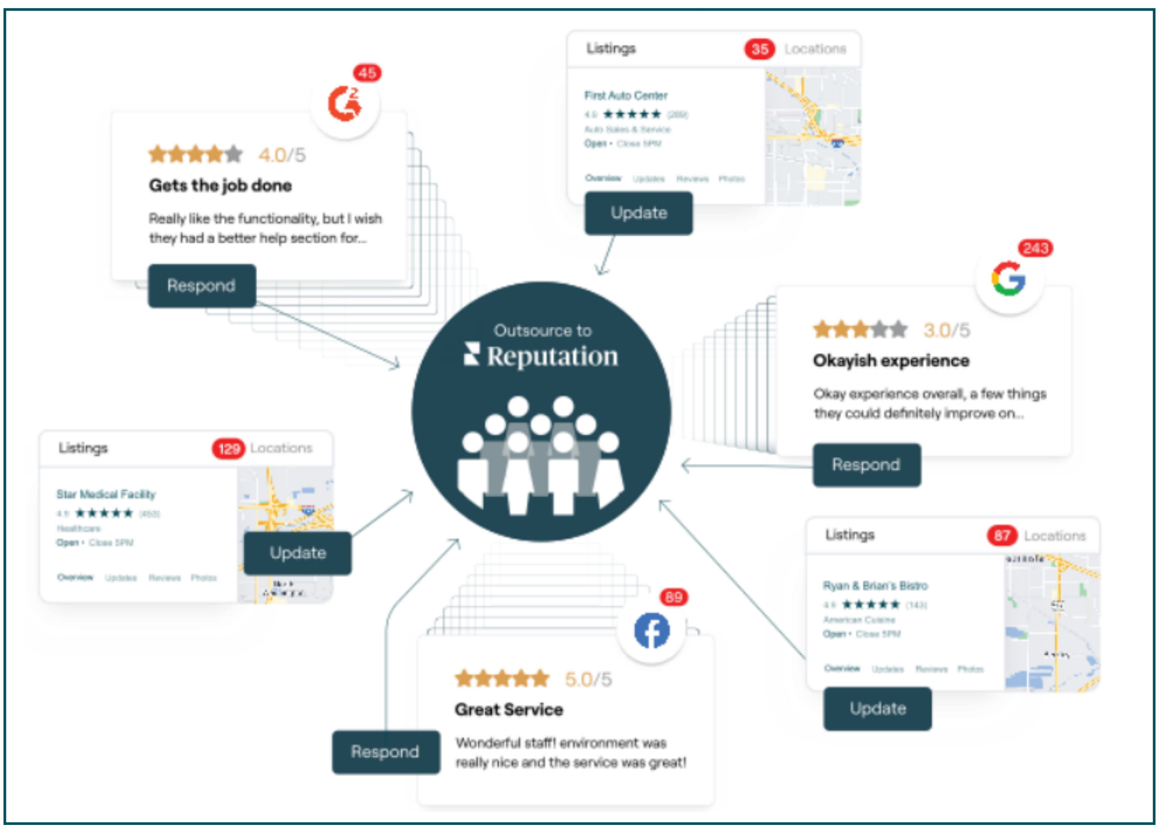
Premium Paid Services

Put our Premium Paid Services platform experts to work for you.

While we strive to make our platform intuitive and efficient, we understand your time is valuable; resources and bandwidth can be limited. Reputation has a dedicated team of experts ready to help you manage your listings; optimize SEO; and post, publish, and curate your social posts—while also managing your review responses. We can help achieve customer excellence through this suite of value-added services that are fueled by our platform and products. These experts will help you:

- Go Beyond Accuracy (Managed Business Listings)
- Maximize the Appeal of Your Business Profiles (Google Profile Optimization, formerly known as Managed Services for Google)
- Harness the Power of Social Media (Managed Social)
- The Brand That Cares the Most, Wins (Managed Review Response)

Note: Contact your Account Executive for more information on our Premium Paid Services.



17 | Additional Resources

Additional Resources

User Guides

Check out our full set of user guides to learn more about the Reputation platform.

- Actions
- Admin
- Customer Journey Insights
- Dashboards
- Experience
- Inbox
- Mobile App
- Rep Connect
- Reports
- Reputation Score
- Requesting
- Reviews
- Social Listening
- Surveys

Contact Support

The Technical Support Team can be contacted in several ways:

- **US Support**: (800) 400-8064
    - Monday–Friday, 7:00 am–5:00 pm PST
- **UK Support**: 0800 066 04781
    - Monday–Thursday, 9:00 am–5:30 pm, Friday 9:00 am–5:00 pm Europe/London (GMT)
- **Virtual Assistant**: In the lower left corner of the Reputation Platform, live-chat with Technical Support or create a ticket that goes to the Technical Support Team.

    - Monday–Friday, 7:00 am–5:00 pm PST
- **Reputation Support Portal**: Sign in and create a ticket on the Contact Us page.

Best Practices for Technical Support Requests

When submitting a ticket through the Support Portal or the Virtual Assistant we recommend including all the information below:

- Business Name
- Location Name (may not apply for multiple locations)
- Location ID
- Case Priority:
    - **Low**: Information request. Can affect one or many users but has a low impact on core functionality.
    - **Medium**: Affects one or many users, high/medium impact to core functionality, but there is a workaround available.
    - **High**: No workaround, high impact to core functionality, affects several users.
    - **Blocker**: For a bug to be deemed a blocker bug it needs to meet one or more of the following criteria:
        - One or more sections of the platform are unusable for all users. This includes the entire platform being unavailable.
        - There is a massive data loss for the account.
- Customer Contact Information (Name/Email)

- Do you have Business Listings? (Y/N)
- Do you have an Integration? (Y/N)

- Issue/Question Type (to the best of your ability)
- Brief Synopsis
  - Be as detailed as possible
  - Steps to reproduce
  - Specific examples
  - Include screenshots when possible

18 | Appendix

Appendix

Social Post Criteria

From character counts and image resolution, to video formats and file sizes, each social network has its own set of rules for posting. Use this quick-reference guide to ensure the social posts meet the criteria and go live as planned.

Facebook

- Facebook posts must contain either body text or attached media.
- The body of a Facebook post must be no greater than 63206 characters.
- Only one type of media (images or videos) can be attached to a Facebook post.

Images

- Images must be one of the following file types: .jpeg, .jpg, .png, .bmp, .tif, .tiff or .gif.
- Animated GIFs do not play on Facebook.
- High resolution images may automatically be resized by Facebook to optimize display on the internet.
- Images larger than 4 MB will be resized to meet Facebook's image requirements.

Videos

- Uploaded video files must be larger than 1 KB and smaller than 1 GB.
- Uploaded videos must be longer than 1 second and shorter than 20 minutes.
- Only 1 video can be attached to a Facebook post at a time.
- Videos must be one of the following file types: .3g2, .3gp, .3gpp, .asf, .avi, .dat, .divx, .dv, .f4v, .flv, .m2ts, .m4v, .mkv, .mod, .mov, .mp4, .mpe, .mpeg, .mpeg4, .mpg, .mts, .nsv, .ogm, .ogv, .qt, .tod, .ts, .vob or .wmv.

Mentions

- Only public Facebook Business pages can be tagged (mentioned) in posts.
- Mentions are only allowed when the post is customized by network.

Google Business Profile (GBP)

- All GBP posts must contain a text body.
- The body of a GBP post must be no greater than 1500 characters.

Images

- A GBP post must contain exactly one image.
- Images must be one of the following file types: .jpeg, .jpg or .png.

Events

- GBP Event posts must have a title specified in the **Google Business Profile** tab.
- GBP Event posts must have a start/end date and time.

Calls to Action

- GBP Call to Action posts require a URL specified in the Google Business Profile tab.

Offer

- GBP Offer posts must have a title.
- GBP Offer posts require a coupon code.
- GBP Offer posts require a redemption URL.
- GBP Offer posts require terms of offer to be specified.
- GBP Offer posts must have a start/end date and time.

Instagram

- Comments/captions must not be longer than 1600 characters.
- No more than six comments/captions can be posted alongside a single post.
- An Instagram post must contain at least one image or video. To publish a Reel, the post must contain exactly one video.
- No more than 30 hashtags can be used in a single post.

Images

- Images must have an aspect ratio between 0.8 and 1.91.
- Image file size must not exceed 8 MB.
- Images must be one of the following file types: .jpeg, .jpg or .png.
- Image width must be at least 320 px.
- Instagram may downsize large images at their discretion.

Video

- Videos must be in mp4 format.
- Video codec must be either H.264 or HEVC.
- Audio codec must be AAC.
- Audio sample rate must be less than or equal to 48 khz.
- Audio must have either one or two channels (i.e., it must be stereo or mono).
- Video frame rate must be between 23 and 60 fps.
- Video must have an aspect ratio between 4:5 and 16:9.
- Video width should be less than 1920 pixels.
- Video must be between 3 and 60 seconds long.
- Video file size must not exceed 100 MB.

Reels

- Reels posts may contain only one video file.
- Video must be in mp4 format.
- Video codec must be either H.264 or HEVC.
- Audio codec must be AAC.
- Audio sample rate must be less than or equal to 48 khz.
- Audio must have either one or two channels (i.e., it must be stereo or mono.).
- Video frame rate must be between 23 and 60 fps.
- Video width should be less than 1920 pixels.
- Video must have an aspect ratio between 0.01:1 and 10:1.
- Video must be between 3 and 60 seconds long.
- Video file size must not exceed 100 MB.

Mentions

- Only public Instagram Business accounts can be mentioned.
- Mentions are only allowed when the post is customized by network.

LinkedIn

- Posts must be no greater than 3000 characters.
- Only one type of media (link, image, video) can be attached to a LinkedIn post at this time.

Links

- Link captions must be less than 256 characters.
- Link titles should be less than 70 characters.

Images

- Images must be one of the following file types: .gif, .jpeg, .jpg or .png.
- Images cannot be larger than 36 megapixels.
- Up to nine images can be attached to a LinkedIn post.
- LinkedIn will downsize images larger than 1536 pixels on either side.

Videos

- Videos must be in mp4 format.
- Files must not be greater than 200 MB.
- Only one video can be attached to a LinkedIn post.

Mentions

- Individuals on LinkedIn cannot be mentioned/tagged.
- An organization can be mentioned/tagged using the organization's vanity name.

TikTok

- Only one video can be uploaded to TikTok at a time.
- The size of the uploaded video file must be less than or equal to 50 MB.
- The length of the video must be between 3 and 60 seconds.
- Supported video file formats are .mpeg4, .mp4 or .webm.
- The video resolution must be at least 540 p.
- Body text is not currently supported by the TikTok API.

X (formerly Twitter)

- Posts must be no greater than 280 characters.
- Appending more than 10 replies to a post may cause X to flag your account as spam.
- Only one type of media (image, gif, or video) can be attached to a post.

Images

- Only four images can be attached to a post.
- Images must be one of the following file types: .png, .jpg, .jpeg or .webp.
- File size must not exceed 5 MB.
- Images larger than 4096 pixels on either side will be downsized.

Animated GIFs

- Only one GIF can be attached to a post.
- File size must not exceed 15 MB.
- Resolution must be no more than 1280 x 1080.
- A GIF must not contain more than 350 animation frames.
- The total number of pixels (width * height * frames) must be no more than 300 million.
- Non-animated GIFs cannot be uploaded to X.

Videos

- Only one video can be attached to a post.
- The aspect ratio of videos must be between 1:3 and 3:1, and X recommends using either 16:9 (landscape or portrait), 1:1 (square).
- The pixel aspect ratio must be 1:1.
- File size must not exceed 512 MB.
- Frame rate must be 60 fps or less, and X recommends using either 30 or 60 fps.
- Dimensions must be greater than 32 x 32.
- Duration must be between 0.5 seconds and 140 seconds.
- Audio must use the AAC codec with Low Complexity profile.
- Audio must have one or two channels (i.e., it must be stereo or mono).
- X recommends using the H264 High Profile video codec.
- Videos with dimensions larger than 1280 x 1024 will be automatically downsized.
- X recommends that videos be in either 1280 x 720 (landscape), 720 x1 280 (portrait), or 720 x 720 (square) resolutions.
- X recommends a minimum video bitrate of 5,000 kbps.
- X recommends a minimum audio bitrate of 128 kbps.
- Only YUV 4:2:0 pixel format is supported; videos that don’t match that format will be adjusted accordingly.

Mentions

- Any X account may be mentioned in your posts.
- Mentions are only allowed when the post is customized by network.

YouTube

- Only one video can be uploaded at a time.
- A title and description are both required.
- Videos must be one of the following file types: .mov, .mpeg4, .mp4, .avi, .wmv, .mpegps, .flv, .3gpp or .webm.
- Video file size must be under 128 GB.
- Video runtime must be under 12 hours.
- Videos must be larger than 426 x 240 px and smaller than 3840 x 2160 px.
- Audio codec AAC-LC is preferred.
- Recommended video resolutions: 3840 x 2160, 2560 x 1440, 1920 x 1080, 1280 x 720, 854 x 480, 640 x 360 or 426 x 240
- Recommended aspect ratio: 16:9

