Social Publish

User Guide

Reputation

2024

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Social Publish Overview

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

Social Media Managers create content with the following goals in mind:

- Engage consumers enough in their brand or product so that they do *something* (e.g., Visit the website, register for an event, request a demo, etc.)
- Maintain consumer interest enough so that they *say something* e.g., Engage with social posts, write a review, refer a friend, purchase additional product, etc.)

Customers want to interact on social media with their favorite brands but also directly with the store in their town, the doctors they visit, and the offices that serve them. In addition to brand pages, locations and professionals also need a strong presence on social media.

Social Publishing makes it easy to promote your brand, join the conversation, and build local advocacy at scale.

Creating Social Posts

Within the platform's **Social Publishing** tool, there are three ways to create new social posts:

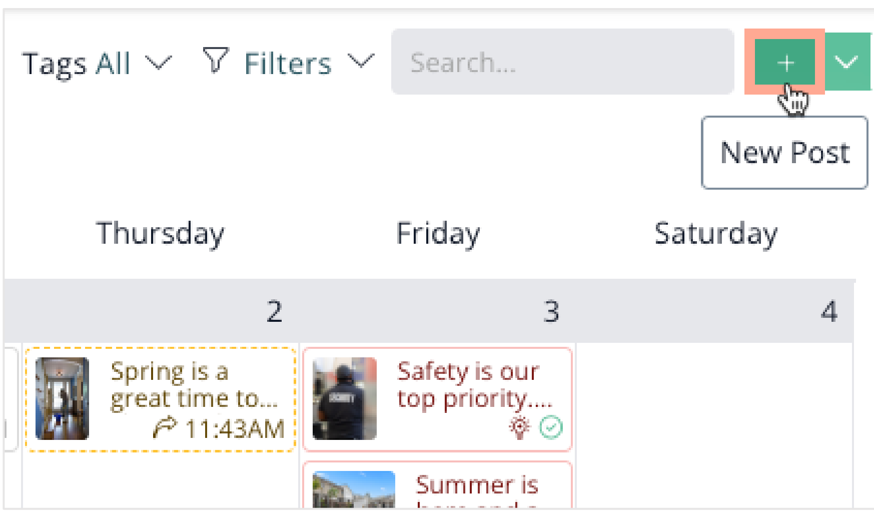
1. Through the **Calendar**
2. Using **Workflow**
3. Via the **Media Library**

Posting from Calendar

The **Calendar** is the most commonly used Social Publish tool when it comes to actually creating social media posts.

1. From the left navigation menu, hover over Publish and then click **Calendar**.
2. Click the **Plus icon** in the top right corner.

> **Note:** Click the dropdown arrow to the right of the Plus icon to do a **Bulk Post Upload.**



3. See **page 5** for instructions on how to build a social media post.

Posting from Workflow

The **Workflow** is primarily used to review and approve/reject posts, you may also use it to create posts. This is handy if upon review, you realize more content needs to be built out. To post from Workflow:

1. From the left navigation menu, hover over Publish and then click **Workflow**.

2. Click the **Plus icon** in the top right corner.

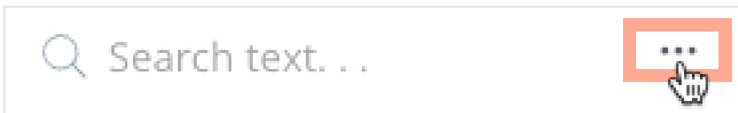
> **Note:** Workflow does not currently offer the ability to post in bulk.

3. See **page 5** for instructions on how to build a social media post.

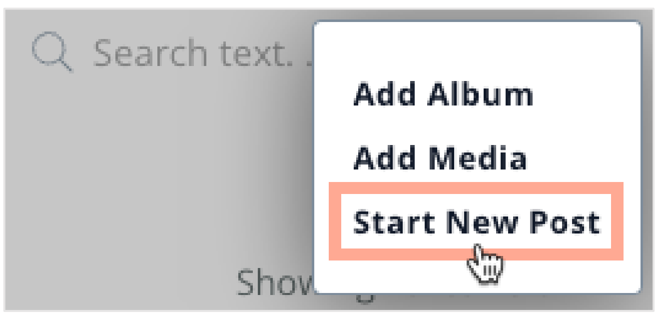
Posting from Media Library

The main purpose of the **Media Library** is to store creative assets, but it is also a great place to create fresh social content. To post from the Media Library:

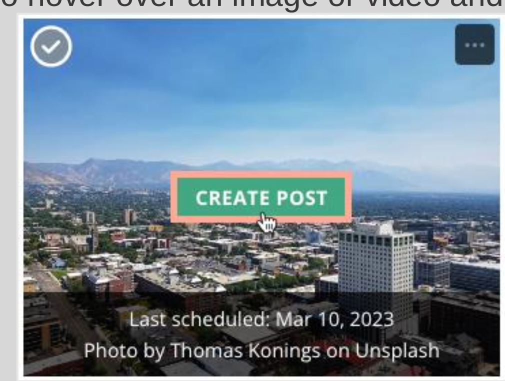
1. From the left navigation menu, hover over Publish and then click **Media Library**.
2. Click the **ellipsis** in the top right corner.



3. Select **Start New Post**.



> **Note:** You may also hover over an image or video and select **Create Post.**

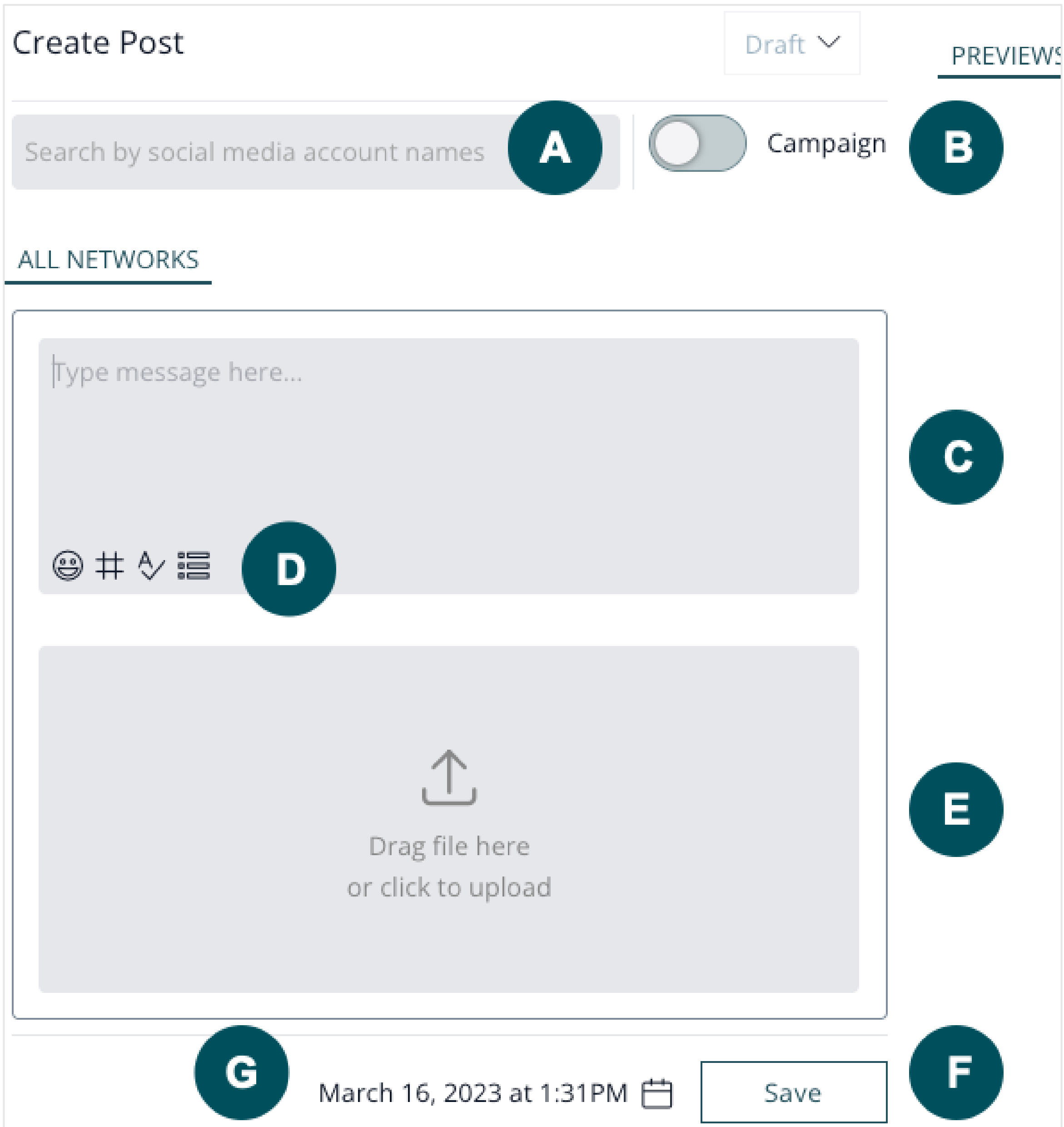


4. See **page 5** for instructions on how to build a social media post.

Build Social Posts

Whether you start in the Calendar, Workflow, or Media Library views, the next steps remain the same.

Upon starting a new post, the following window will appear to **Create Post**.



<table>
<tr><td>A</td><td>

From the Search bar dropdown, select any or all social platforms you wish to post from. <u>Only your connected social networks will be included.</u>
Select the location(s) from the dropdown to choose where content should appear. <u>These additional filters are not required to publish content.</u>
Add other filters (Country, City, State, or Province) to further narrow your publishing options. <u>This dropdown list includes only the locations for which you have connected social accounts.</u>

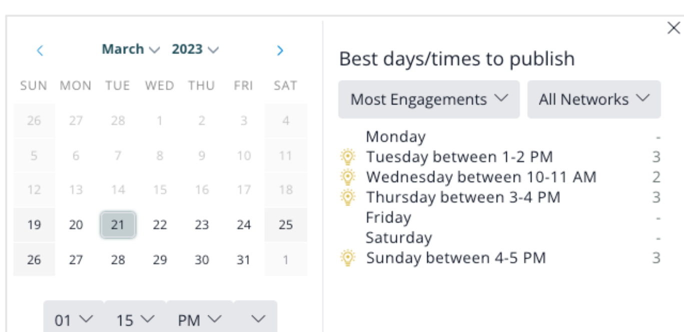
</td></tr>
<tr><td>B</td><td>Add to an existing campaign collection to organize your posts.</td></tr>
<tr><td>C</td><td>Type the caption of your post here.</td></tr>
<tr><td>D</td><td>Adjust the following:

Emojis: Insert one or a whole string of your favorite emojis
Hashtags: Add trending, relevant hashtags to expand the post's reach. Create a hashtag group made up of multiple hashtags and add them to the post all at once
Spell Check: Highlights any word that may have been spelled incorrectly to catch typos
Custom Fields: Personalize your posts with dynamic fields like Location Name, City, Brand Name, and more
Facebook Targeting: Set criteria like Location, Interests, and Age to define your audience and get your posts in front of the people who are most likely to find them relevant
Character Count: Keep content within the limits of each social network

</td></tr>
<tr><td>E</td><td>Click the Plus icon to upload media (e.g., photos, videos, or gifs) or drag and drop media files here. Once uploading, an additional option will pop up to make it a post or a reel.</td></tr>
<tr><td>F</td><td>Click Save to save a draft version of your post and add it to the Workflow for review, approval, and scheduling. If you have review/approval stages in your Workflow, your post must meet the requirements of each stage before it can be scheduled.

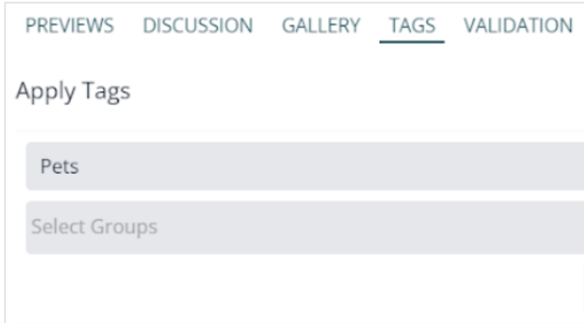
Note: With the right permissions, you may see the Schedule button instead of Save.</td></tr>
<tr><td>G</td><td>Schedule when the post will go live. Adjust the date, time, and time zones as needed.

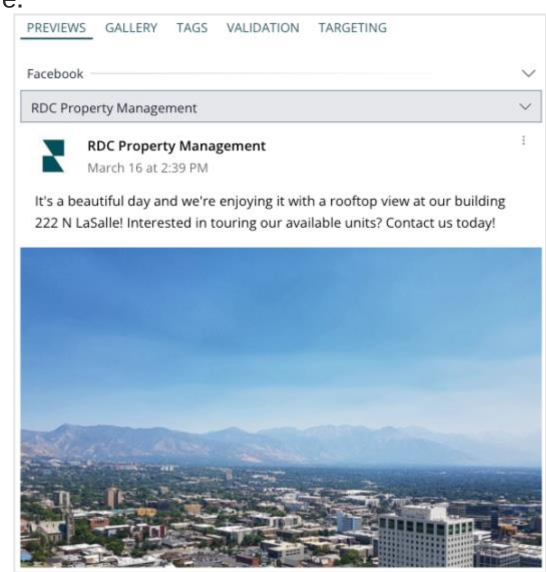
Note: Click the dropdown arrows to view tips on best days and times to publish for optimal post performance (engagements, likes, etc.).



</td></tr>
</table>

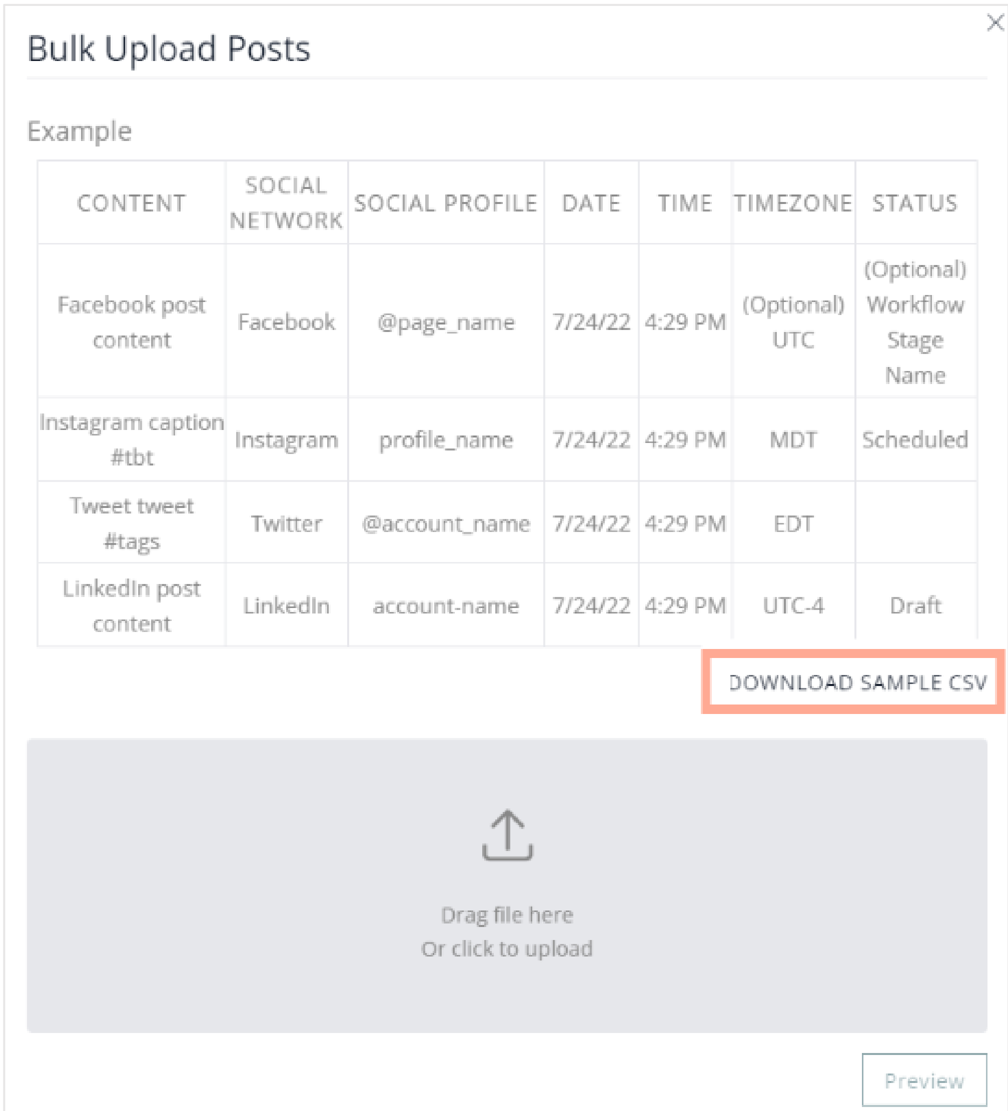
On the right side of the Create Post window, you'll see additional options.



Field	Descriptions
Previews	Take a look at your post and how it will appear on each social media site before the post goes live. 
Discussion	Creating great social content is a team effort so bring the team together in the platform Tag in teammates with an @ mention to collaborate at every stage of the process. When creating or editing content, click over to the Discussion tab to start or continue a conversation about what's needed to complete the post, e.g., a different image, missing web address, or send a nudge that the post is ready for review.
Gallery	Manually or use filters to select the appropriate imagery from the Gallery.
Tags	Categorize your posts by brand, location, theme or other relevant topic for easy sorting and reporting. Users can also add brand new tags or tag groups from here.
Validation	Confirm all systems are "GO" for each social network (i.e., images are the right size and format, videos aren't too long, etc.) and make any final tweaks before publishing.

Post in Bulk

If you have several posts that you've created outside of the Reputation platform, add them to a .csv file (*download the sample & save a little time!)* and upload them all at once using the **Bulk Upload** feature, found in the **Plus icon** dropdown menu.

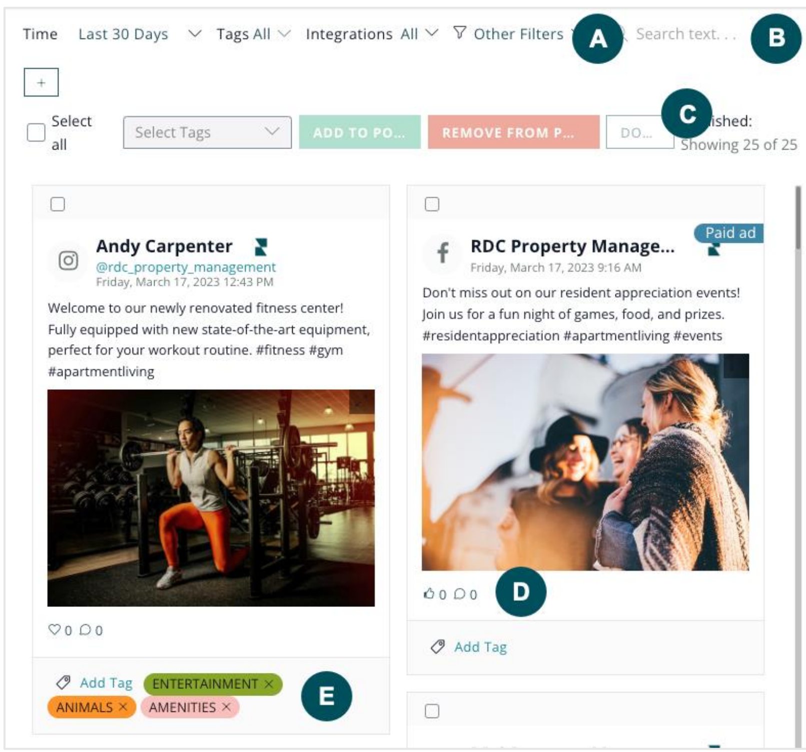


Recent Posts

See all live social content and engagements across all locations and sources in one easy-to-view, easy-to-sort location.

Hone in on your live social content. From the left navigation menu, click **Recent Posts.** Here, you will see every published post and each post's engagement level (e.g. likes, shares, and comments).

Add filters to see only what you need and add/remove tags from one/some/all live posts to refine your search.



A	**Filter & Sort** your 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** like comments, likes, and shares
E	Click to view, add, or remove tags associated with the post

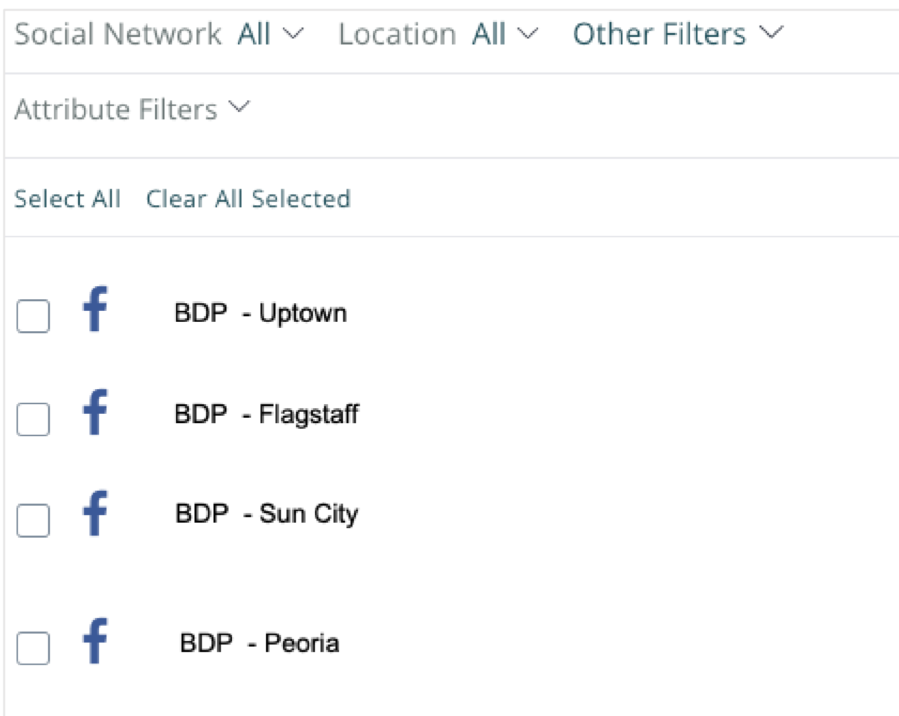
Filters

Dig deeper into your content with just a click or two. Sort your content by location, tags, source, and more with top-line filters. Decide how you want to see your recent posts and then select that category or categories from the dropdown menu.

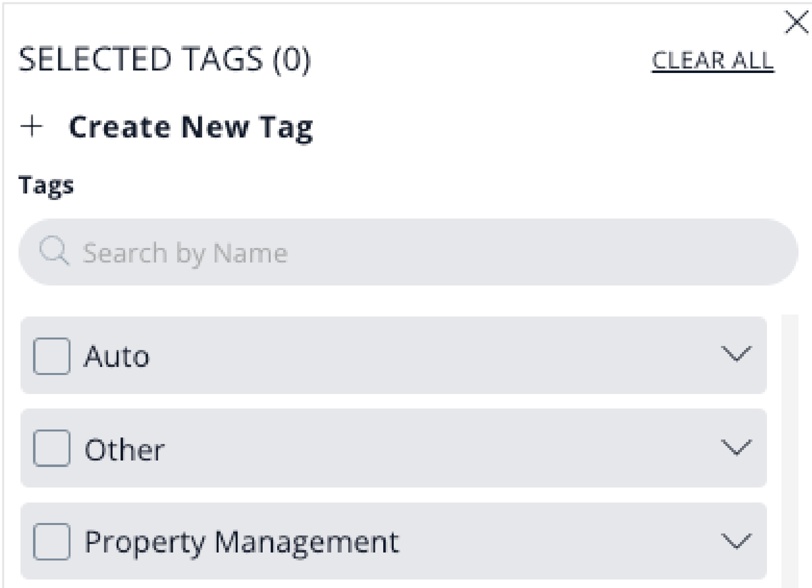
Filter your content through the following options:

Time Filter

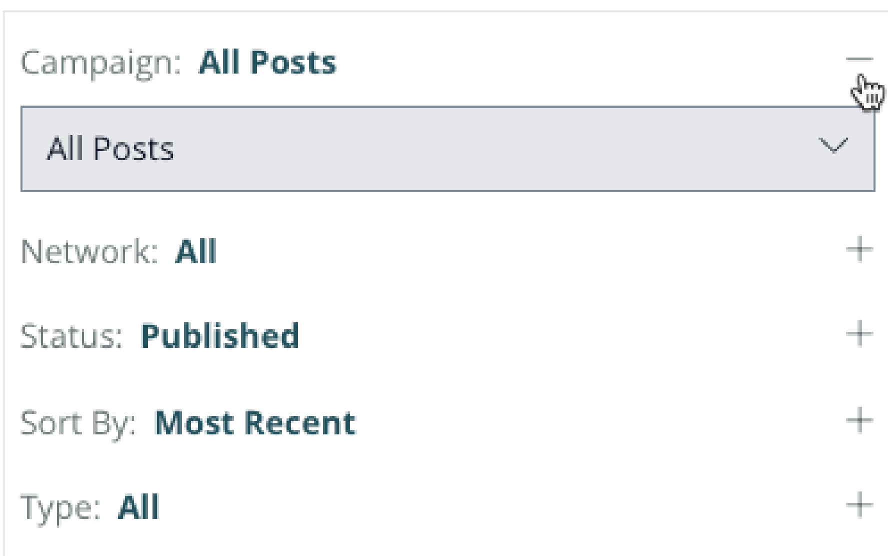
Source & Location (Integrations) Filter



Tag Filter

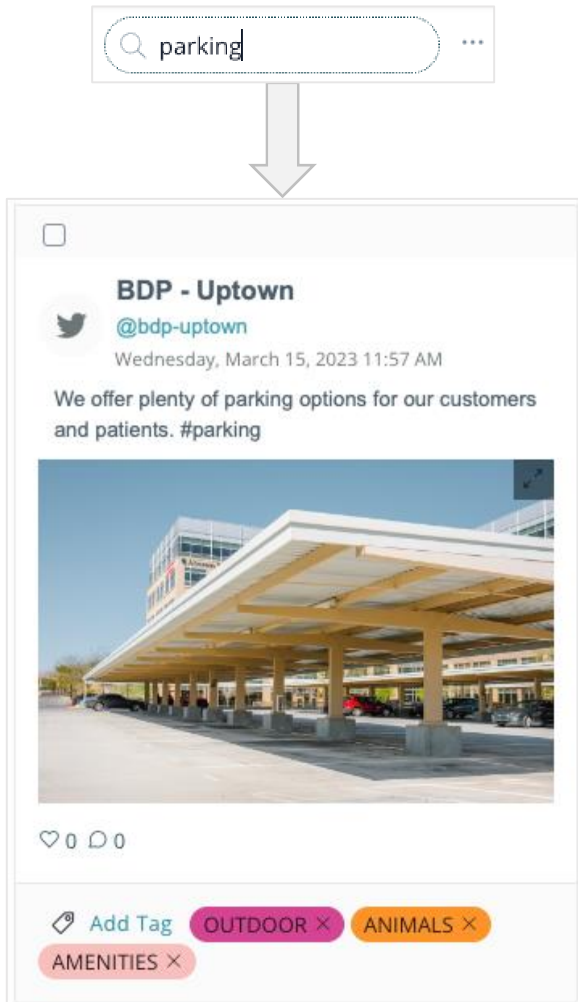


Content Status (Other) Filter



Search

Type a particular keyword, tag, or term into the **Search** to sort content by that word.



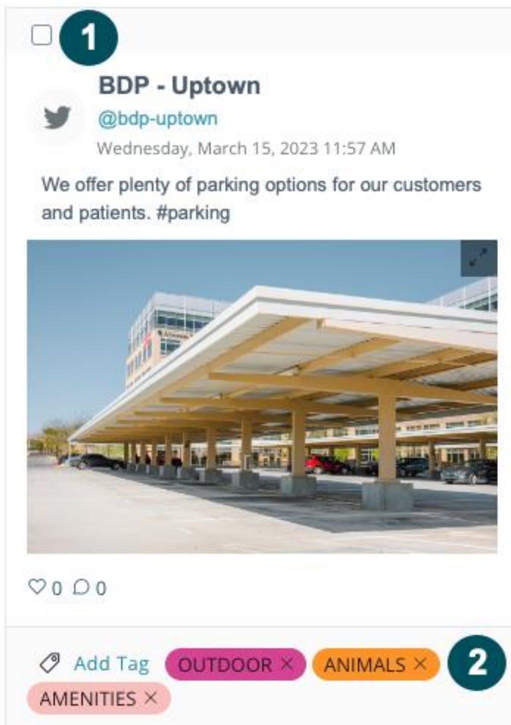
Tags

Using tags not only makes fast work of searching through content in the Calendar, but it also makes it easier to identify in your Recent Posts feed. Color-coded tags let you categorize content by brand, location, type, theme, or other relevant topic.

> **Note:** The platform allows you to add or remove tags to one, some, or all of your published posts.

There are two ways to add tags to published posts:

1. Check the box in the upper left corner of every image you wish to add or remove tags to in bulk.
2. Click **Add Tag** to add to a single post.



Engagements

One of the goals of social media marketing is to drive engagement; you want followers to like, share, and comment on your posts. See **Page 22** for Dashboards & Reports and dig into those metrics.

For a condensed, high-level view of that activity from your Recent Posts feed. Look for the social engagement icons at the bottom of every live post to see the total number of likes, shares and comments received. Click into those numbers to review more details, like emojis used and comments made.

Calendar

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

As the hub of your social marketing program, the **Calendar** serves up all content in a dynamic, color-coded view that can be sorted by source, location, or other variables for a closer look at your activity. You can also edit scheduled posts or create new ones directly from this page. See **Page 4** for more information on how to post from the Calendar.

Whether creating social content for one or multiple locations on your own or part of a team, managing hundreds of posts each month can be overwhelming. The Calendar brings it all together for a bird's-eye view of the entire social content plan so you can instantly see what's published, what's scheduled, and where more needs to be added.

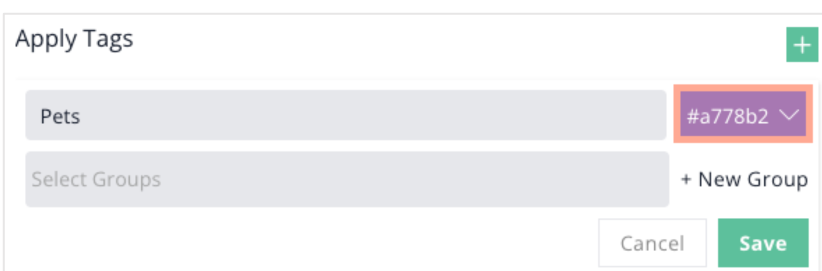
Using the Calendar

Hover over Publish on the left navigation menu and click **Calendar.** This shows the current month with each post presented as a thumbnail view on the day/date it went live or when it is scheduled to go live.

Note: Duplicate management applies to Google and Facebook listings only. The platform displays potential Foursquare duplicates for awareness purposes.

Organizing the Calendar

Using **tags** not only makes fast work of searching through content, but it also makes it easier to identify on the Calendar. Tags allow you to categorize content by brand, location, type, theme, or other relevant topic, and each tag is given its own color. The post will then show up in the calendar with the post's associated color.



Status Symbols

Thumbnails, tags, and colors are helpful for seeing and sorting the types of content created. Check the status symbols to monitor which posts have been published, which are in draft, and those that have yet to be published.

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** appears in a light gray*

Unscheduled Content

A **dashed line** means that the post is not ready to go live. It may still be in draft stage, 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*

Published Content

Once a post is successfully published, you'll see a green checkmark 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*

Note: Use the top-line filters to sort content by location, tags, sources, and more. Decide how you want to see your content and then simply select that category or categories from the dropdown menu.

Media Library

Store creative assets like photos, videos, text, and links for use in social posts or as a source of inspiration.

The Media Library is home to your creative assets, like images and videos, and the perfect place to create fresh social content. When inspiration strikes, click the ellipses in the upper right corner and select "Start a New Post" or simply hover over the image you want to use and select "Create Post". Either option will open the "Create Post" window.

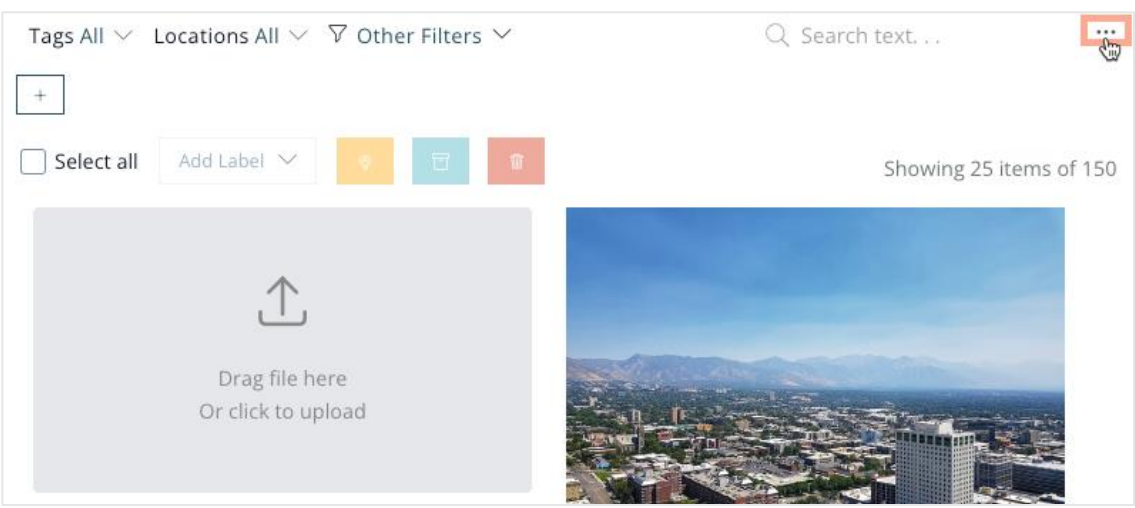
See **Page 5** for more on starting a new post or **Page 6** to learn what to do next after starting a post.

Note: When creating a post from a specific image or video, the platform automatically adds that asset to the post.

Save and categorize design elements to use in current or future social posts, or upload images you like to get the creative juices flowing.

Add Creative Assets

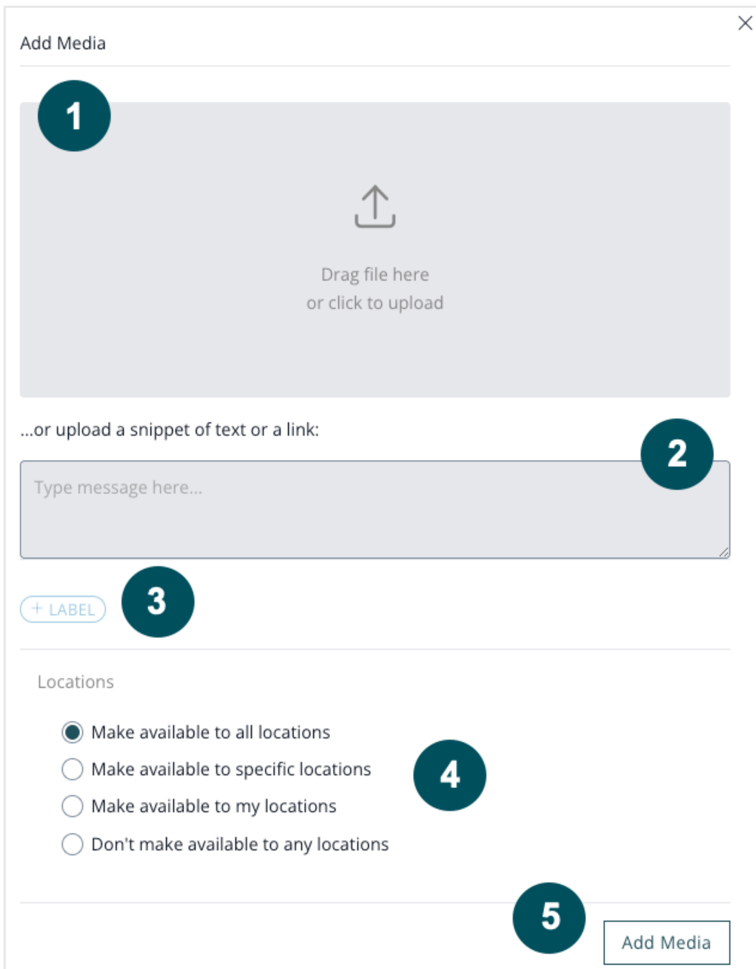
Adding photos, videos and other creative assets is as simple as dragging-and-dropping or uploading a file. From the main Media Library page, click the upload icon in the top gray box or click the ellipsis in the upper right corner and select **Add Media**.



Locations

Once you've added the file, you can simply click the **Add Media** button and be done, but you'll thank yourself later if you add the extra file details now:

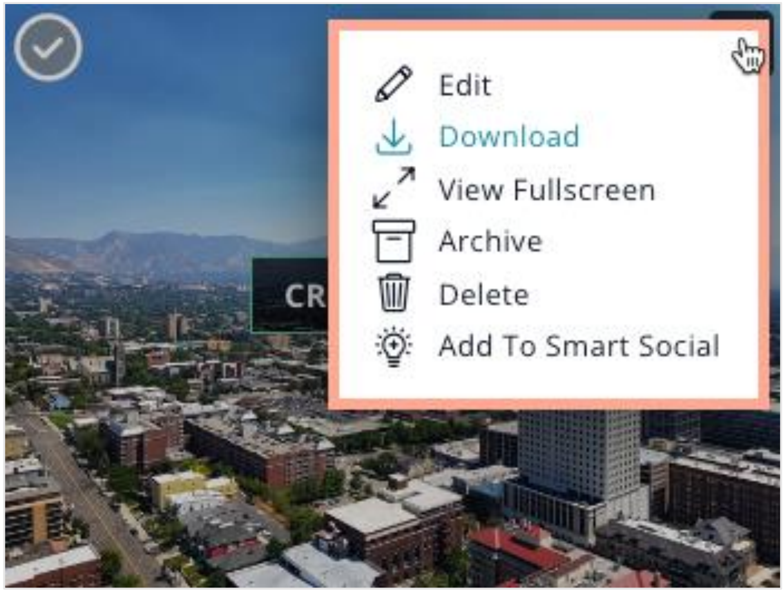
1. **Add a file:** Drag-and-drop or click to upload the file from your computer
2. **Add text or link:** Include draft copy or text snippets, or links to articles, blog posts or other websites
3. **Add tags:** Remember to include a tag (or tags) to categorize the media and make for easy searching
4. **Add access:** Decide whether you want to share this media with some, all or none of your locations
5. **Add media:** You're done! Click to save and store this media in your Media Library



Note: Use the top-line filters to sort assets by source, media type, location, tags, and more, or use the **Search bar** to quickly sort your Media Library by keywords.

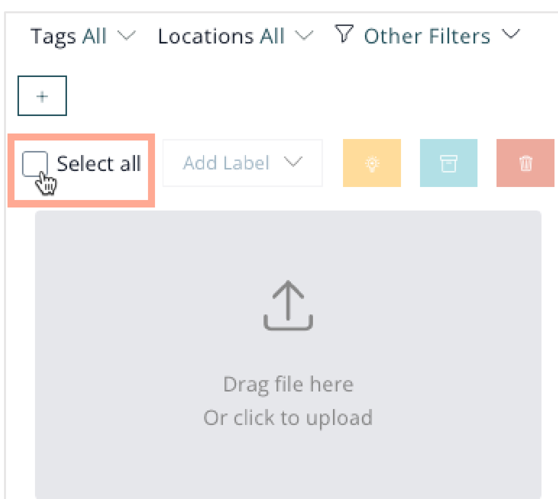
Additional Features

Select one or more media files, and then click the ellipsis to access additional features as shown in the image below.



Note: To select individual assets, click the check mark in the upper left corner of the thumbnail image. It will change to dark green, indicating it's selected. Once you see the dark green check mark, you can add a tag (or tags), archive, or delete the file.

To make changes to all assets in your Library, click **Select All.** You'll see the dark green check mark, indicating all assets have been selected. From there, add a tag (or tags), archive, or delete all files in bulk.



Workflow

Ensure your content is on-brand and in compliance with customizable workflows built around your policies and standards.

With its customizable review/approval stages and its Kanban-style progress tracker, Workflow acts as a guardrail to prevent unapproved content from going live.

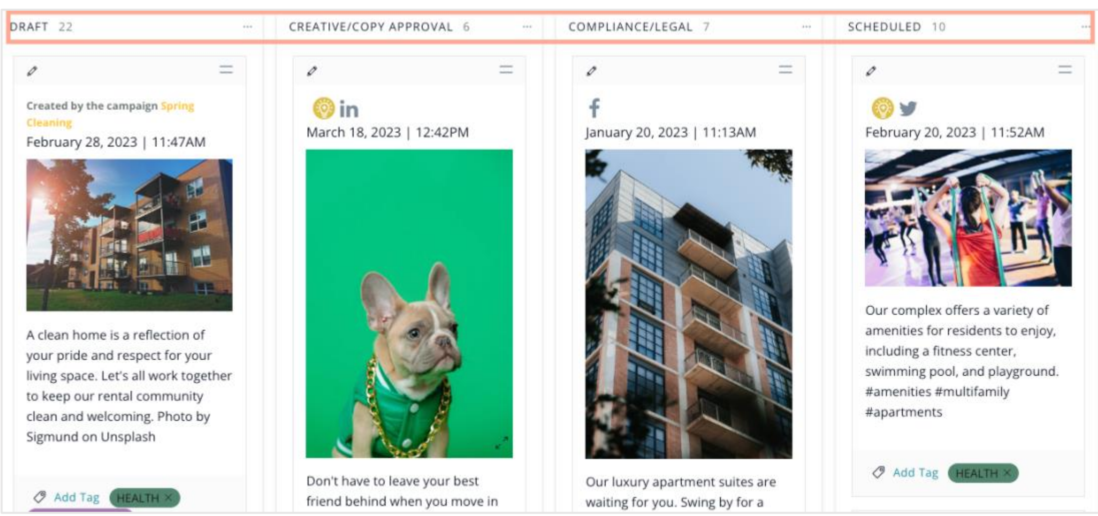
From the left side navigation menu, hover over Publish and select **Workflow.**

Build Your Workflow

Every workflow begins with two stages: **Draft** and **Scheduled**. You can keep this simple two-step approval process or add more stages to mirror your current content creation and review/approval structure.

Let’s look at an example of a four-stage workflow. In the following instance, the user has included 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. Additionally, team members can collaborate throughout the process, making edits and comments, directly in the platform.

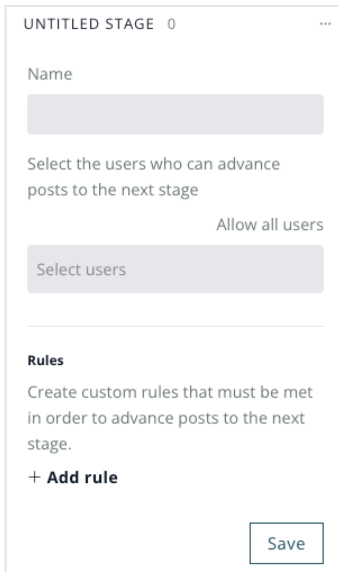


Note: Each stage is labeled at the top of a workflow and the number shown in the headers reflects the number of posts in each stage.

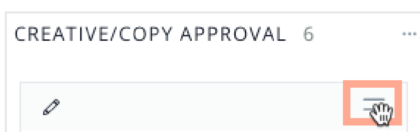
To Add a Workflow Stage

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

3. Name the stage.
4. Select users with authority to review and approve content in this stage.
5. Create custom rules that must be met to advance posts to the next stage (i.e., body text must contain a hashtag when posting to Facebook or post must have a tag).



6. 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.



Note: All users can move posts back to a previous stage (i.e., from Compliance/Legal back to Drafts), but only those users with review/approve permissions can move a post forward to the next stage (i.e., from Creative/Copy approval to Compliance/Legal).

Users with Admin permissions automatically have approval permissions, so it's not necessary to add them as an approver in each stage. Adding them as an approver will send an email notification when there's new content to review.

Once a post is published, it's removed from your workflow. You'll now find it on your Calendar on the day/date it went live.

7. Click the **ellipsis** in the upper right corner of the stage to edit or delete stages from the workflow.

> **Note:** Deleting a stage will not delete posts in that stage. They will simply be moved to the prior stage. It is not possible to delete the first of last stages in the workflow.

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

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

Dashboards & Reports

Monitor social media performance with real-time data and graphical insights you can use to adjust your current plan and inform your future content strategy.

Social Media Managers spend countless hours creating content that will engage their audiences and attract new followers. Use Dashboards and Reports to ensure you're on the right track and creating the right content that resonates with your followers:

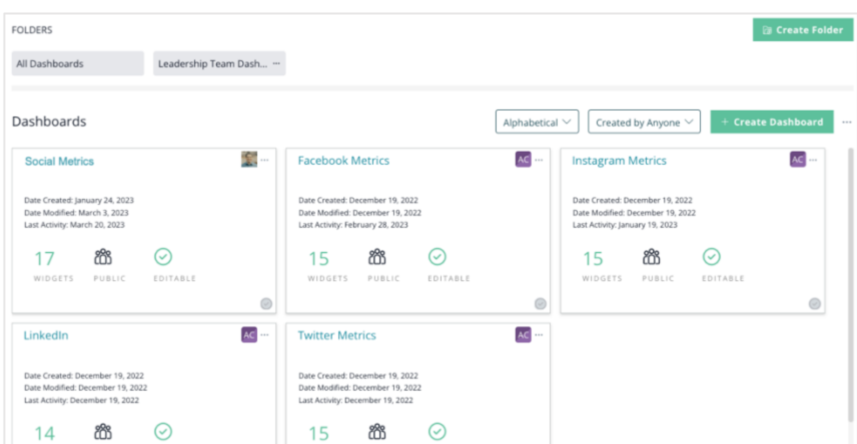
- **Dashboards** present data and insights needed to monitor your content and how effective it is in encouraging your audience to take action (i.e., commenting on your post, clicking a link, registering for a sponsored event, etc).
- **Reports** are generated from your Dashboards and allow you to share that data with others to demonstrate where your efforts are delivering results and validate your strategy.

Dashboards and Reports are fully customizable to measure the metrics most important to you.

Dashboards

Different roles or teams may monitor different things. One may want an overall, consolidated dashboard that serves up data for the social activity across all pages and locations, while one is monitoring monthly performance of each individual social platform. The leadership, on the other hand, may want a quarterly snapshot of regional performance.

This "dashboard of dashboards" provides a view of all dashboards monitored across all teams. From the left side navigation menu, hover over **Publish** and select **Dashboards** to locate all of your social dashboards in a tile view.



The Dashboards landing page is also more than just a launchpad for new dashboards.

1. **Sort, Delete or Archive:** Use the dropdown menus to see only the dashboards you need; **click the ellipsis** to clean things up by deleting or archiving old or unused dashboards.
2. **Create Folders:** Organize your dashboards by source, location or other category for easy viewing and sharing. **Click the Create Folder button** in the upper right corner to create as many folders as you need.
3. **Edit, Duplicate, Delete, Archive, Report:** Within each dashboard, you can edit its details, generate reports and more! **Click the ellipsis** for additional dashboard-level options.

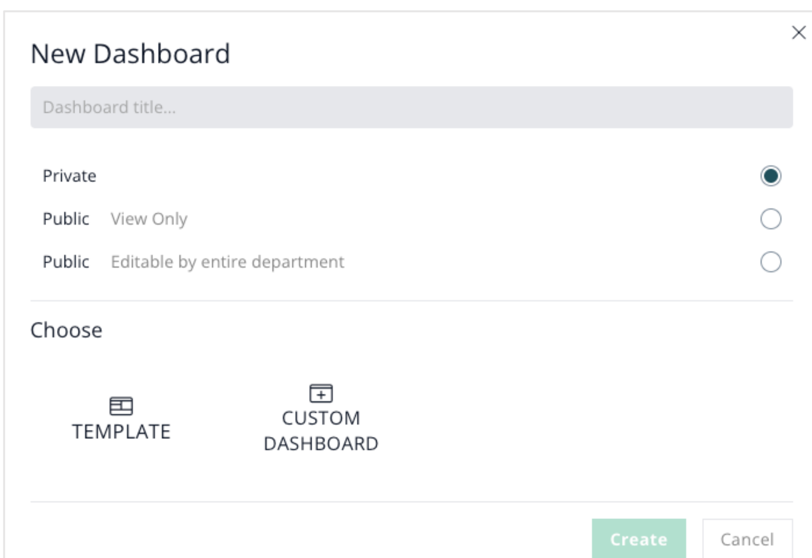
Build a Dashboard

To create a new dashboard, click the Create Dashboard button in the right corner to launch the New Dashboard pop-up window and adjust the following:

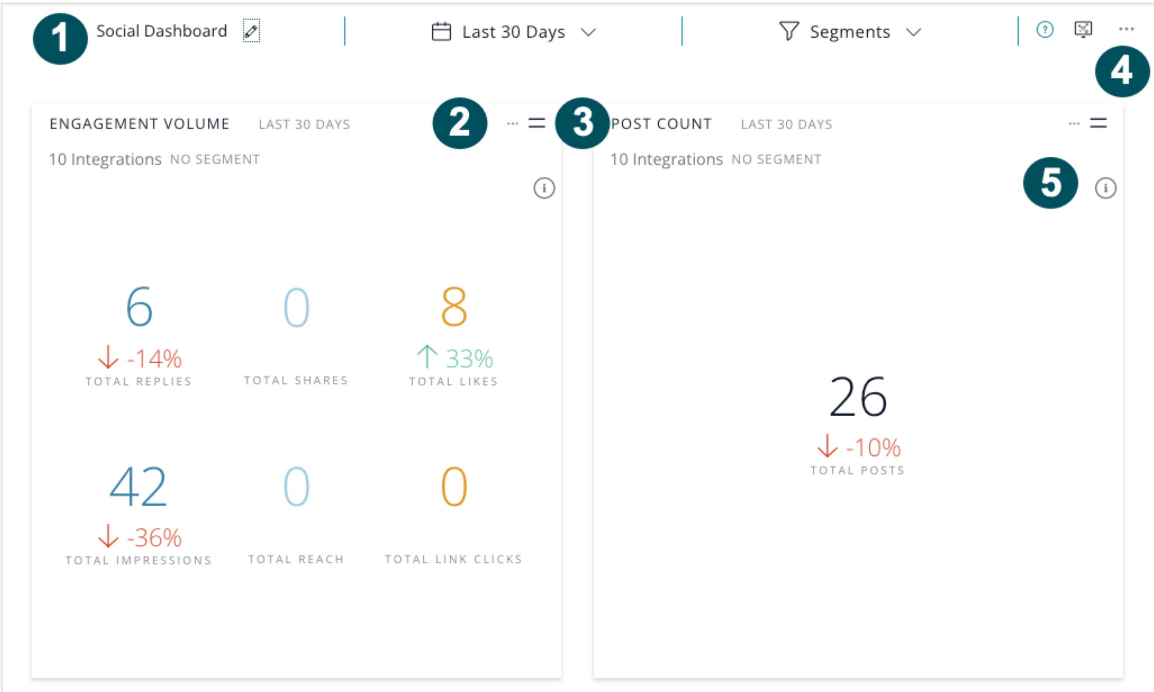
1. Give your dashboard a title.
2. Choose the status of your dashboard.

    - **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

3. Select a Template of create your own with the Custom Dashboard builder.
4. Click **Create**.



The **Dashboard Template** gives you clear, concise visualizations of the most-often measured social media metrics, while giving you the flexibility to edit and move widgets as you choose. You can also go beyond the numbers to uncover valuable insights and trends in your data.



1. Use top-line filters to change the name of your dashboard, set the timeframe, and add segments.
2. View data visualizations in widgets; click the ellipsis to edit the widget configurations like type, source, visualization, and timeframe.
3. Grab the double-line to move and reorder widgets: view as individual rows or up to 3 across.
4. Click the ellipsis to share, create a report, or archive.
5. Click the info icon to reveal insights and custom analysis.

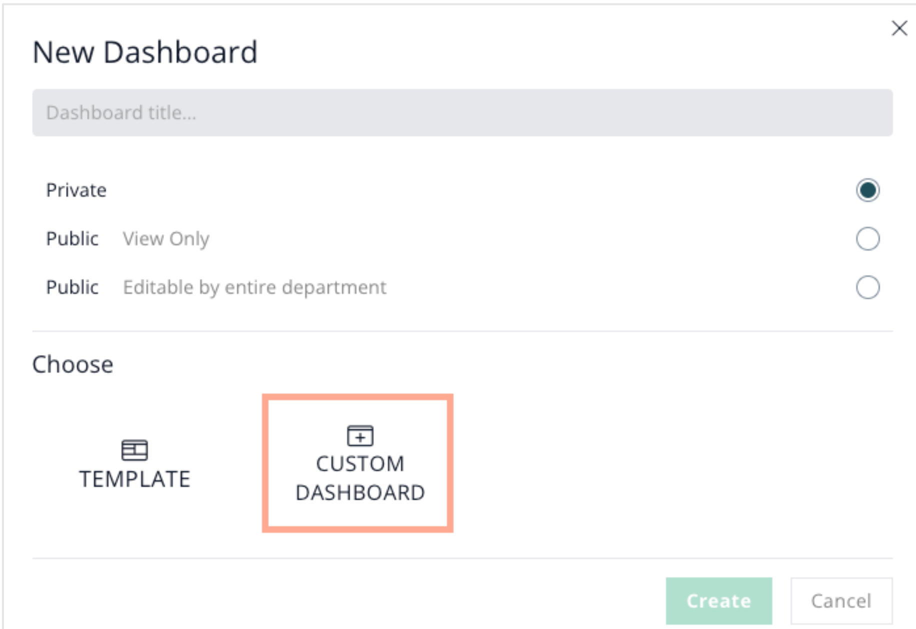
Custom Dashboard

If you're looking to dig a little deeper and configure data in a manner that aligns with specific departmental and organizational goals, Custom Dashboards may be preferred.

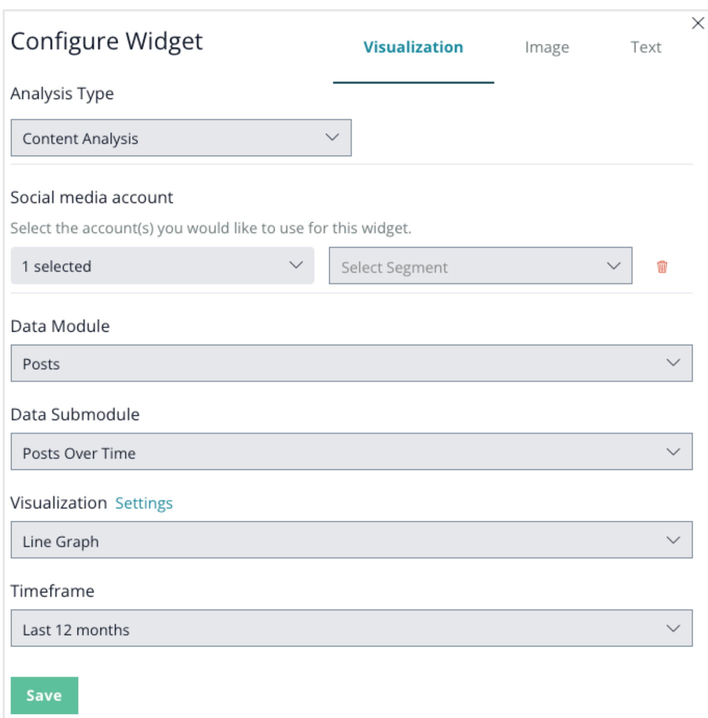
Custom Dashboards start as a blank slate for you to create your data masterpiece. Choose a visualization for each widget - like graphs, charts and bubble maps - then place them in order of importance to you and your team (Most Engagements first, or Post Count and Follower Count side-by-side, for instance).

To build your custom dashboard:

1. Name your dashboard and choose whether you want to keep it private, share with others, or allow others to view and edit.
2. Select **Custom Dashboard.**
3. Click **Create**.



4. Click “Add row” to add widgets and then arrange to customize your dashboard.



Reports

Dashboards are more than just a timely window into your social media performance. They're also the springboard for generating reports that you can share with your team and other key stakeholders.

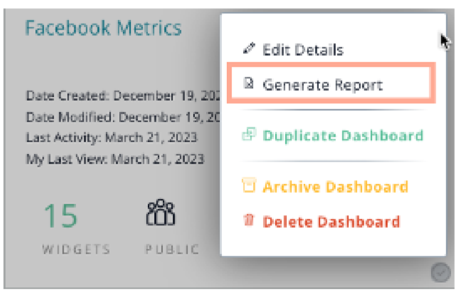
Schedule and share reports automatically (daily, weekly, monthly or whenever you need them) via email or print.

You can create reports directly from the dashboard or from the Reports landing page.

Dashboard-Direct

When viewing the Dashboards landing page, or from a specific dashboard, simply click the ellipsis to launch the Report window, where you'll select the settings and scheduled for your report. There are two ways to generate reports from the Dashboard tab:

1. **Dashboard Landing Page:** Click the ellipsis in the upper right corner of the desired dashboard tile
2. **Dashboard:** Click the ellipsis in the upper right corner of the dashboard



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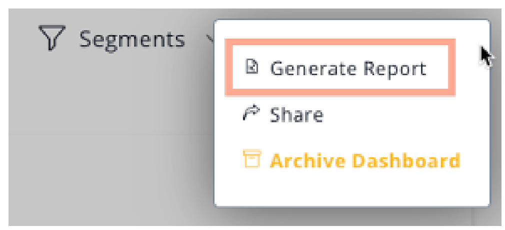


2

Reports Landing Page

From the Reports landing page, **click the plus sign** in the upper right corner to launch the Report window, where you'll choose between Dashboard Report and Dashboard Report Schedule tabs and select your settings.

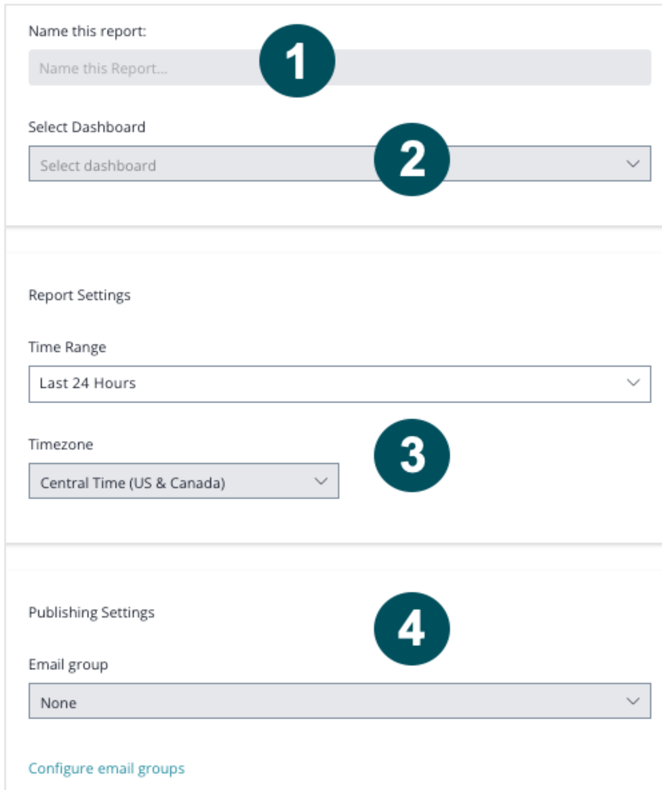
Report History | View All | Search Reports... | +

Showing page 1 out of 1

NAME	TYPE	START	END	CREATED AT	PDF	STATUS
Instagram Metrics	Dashboard Report	Mar 7, 2023 10:32 AM America/New_York	Mar 8, 2023 10:32 AM America/New_York	Mar 8, 2023 10:15 AM		EDITABLE
Facebook Metrics	Dashboard Report	Jan 30, 2023 12:00 AM America/Chicago	Mar 1, 2023 10:57 AM America/Chicago	Mar 1, 2023 11:04 AM		EDITABLE
Twitter Metrics	Dashboard Report	Jan 17, 2023 12:00 AM America/Denver	Feb 16, 2023 1:46 PM America/Denver	Feb 16, 2023 2:47 PM		EDITABLE

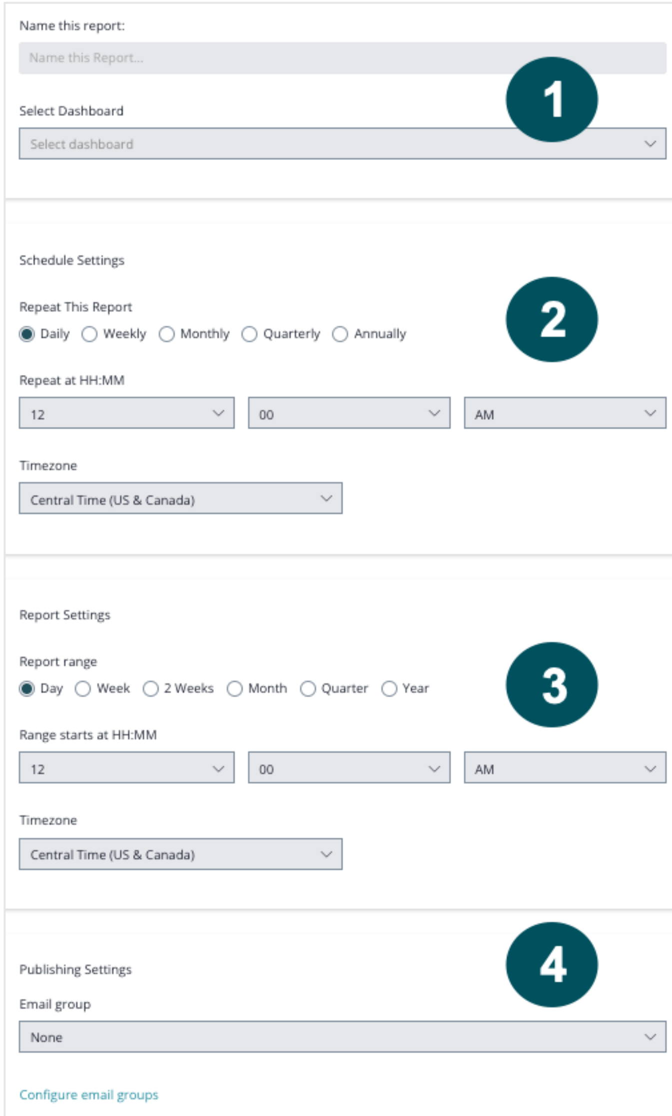
Set up your reports in just a few easy steps. Set the data to be reported daily, weekly, quarterly, or before the big planning session, printed as needed or delivered right to your (or the team's) inbox on the scheduled day and time.

Dashboard Report Tab



1. **Name** your report
2. **Select the dashboard** to report on
3. Choose the **time range & time zone**
4. **OPTION:** Add the **email group(s)***

Dashboard Report Schedule Tab



1. **Name** your report and **Select the dashboard** to report on
2. Choose the **schedule cadence** for this report; how often and what time this report should run
3. Choose the **report range** to show data for the desired time period (i.e., current day, week, month, quarter or year)
4. **OPTION:** Add the **email group(s)***

Additional Reporting Features

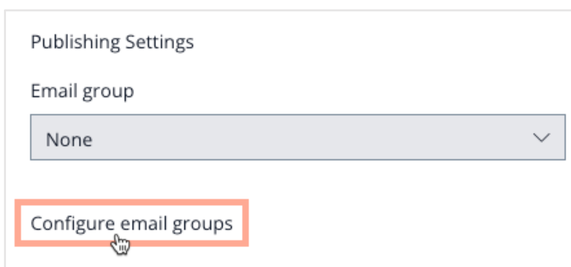
Create Email Groups

Need to share reports with the same people? Create an email group! Email groups save the time and hassle of entering multiple email addresses each time you want to share a report. Set it up once and the platform will automatically deliver the report to their inbox according to your report schedule settings.

1. From the Dashboard Report or Report Schedule tabs, **select Configure Email Groups** to launch the Email Groups window.
2. Click **Add Email Group** to enter the email addresses of those who should receive reports. Create as many email groups as you need.
3. Enter the sender's (Messenger) name, whether a name, department or team name, or something else entirely.
4. Add the email address(es) of the person/people to include in this group. You may add as many recipients as needed.
5. Save your email group.

> **Note:** Save time when scheduling reports and select your new group(s) from the Email Group dropdown.

Repeat these easy steps to create as many groups as you want.



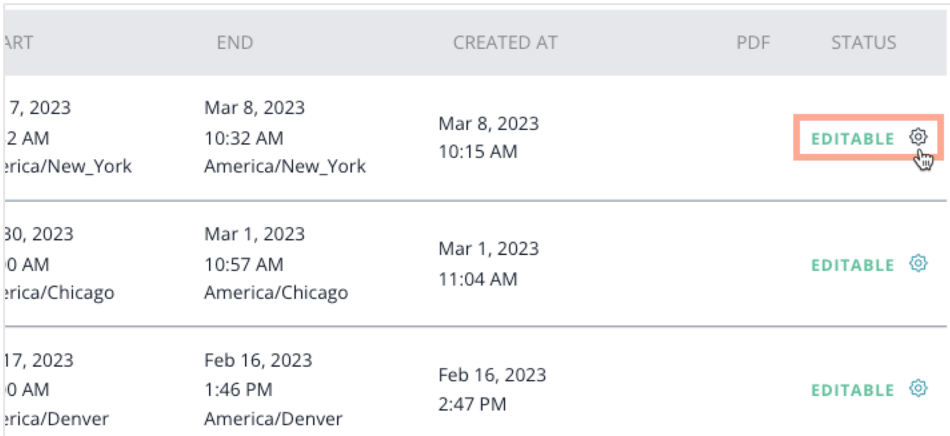
Send Reports via Text

In the **Email Groups** window, select **SMS** instead of Email and follow the same steps as with Email Groups but add phone numbers instead of email addresses.

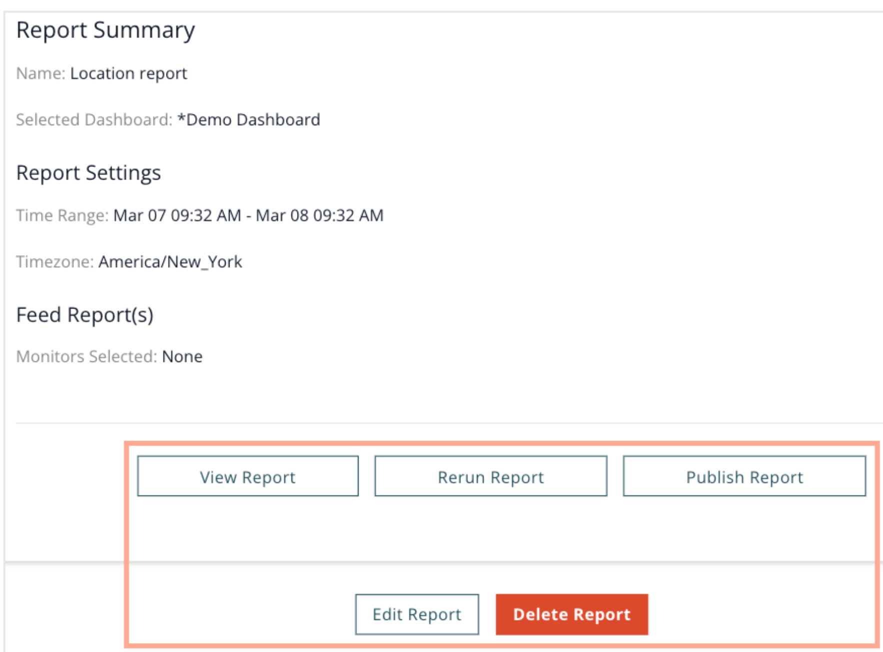
Edit Reports

As your team's needs change, so may your reports. Easily add or remove recipients, change the cadence of a report schedule, and update the date range to report on.

From the **Reports landing page**, select the **gear icon.**



- **View** your report to confirm it's capturing all the data you want…in just the way you want it
- **Rerun** your report to reflect any updated settings
- **Publish** your report so others can see it
- **Edit** your report to change any/all settings, add or remove recipients, and more
- **Delete** your report if/when it's no longer needed



Additional Resources

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

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