



USER GUIDE

PowerSocial

CRM 2013 | 2015



Service



Support



Education



Add-ons

Contents

Configuration

Setup

Security Roles

Uninstalling PowerSocial

Using the Solution

Creating a Publisher

Publisher Form Fields

Alias

Media

Link Account

Social Posts

Owner

Publisher

Post Date

Approve

Campaign

Social Post Type

Message

Result

Scheduling Posts

Social Monitoring

PowerSocial Monitor

Twitter Monitoring Options

Adding a Contact or Lead from the Social Monitor board

Create Contact

Create Lead

Additional Monitoring Abilities

Twitter

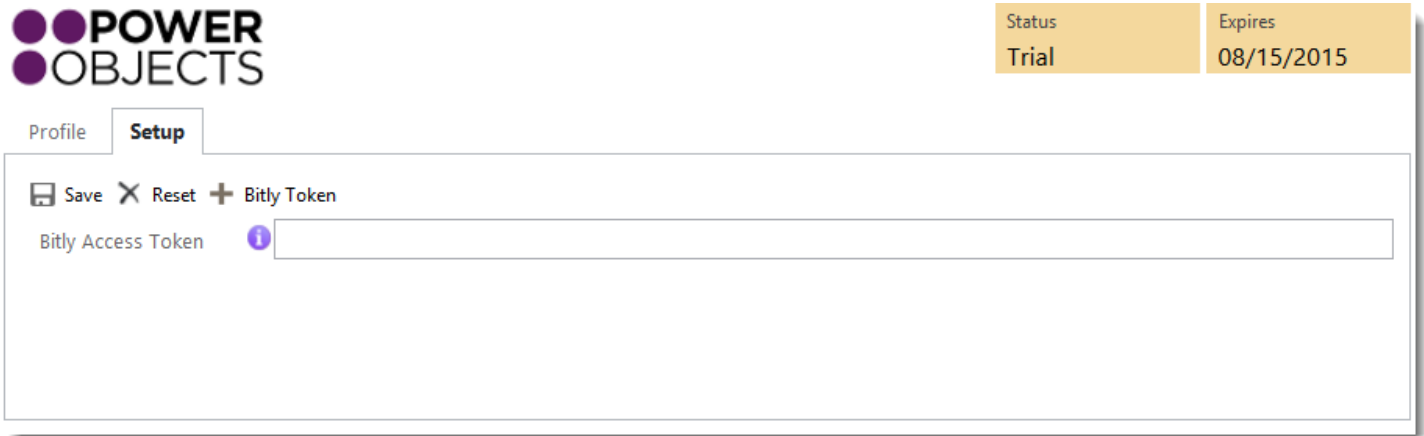
Social URLs



Configuration

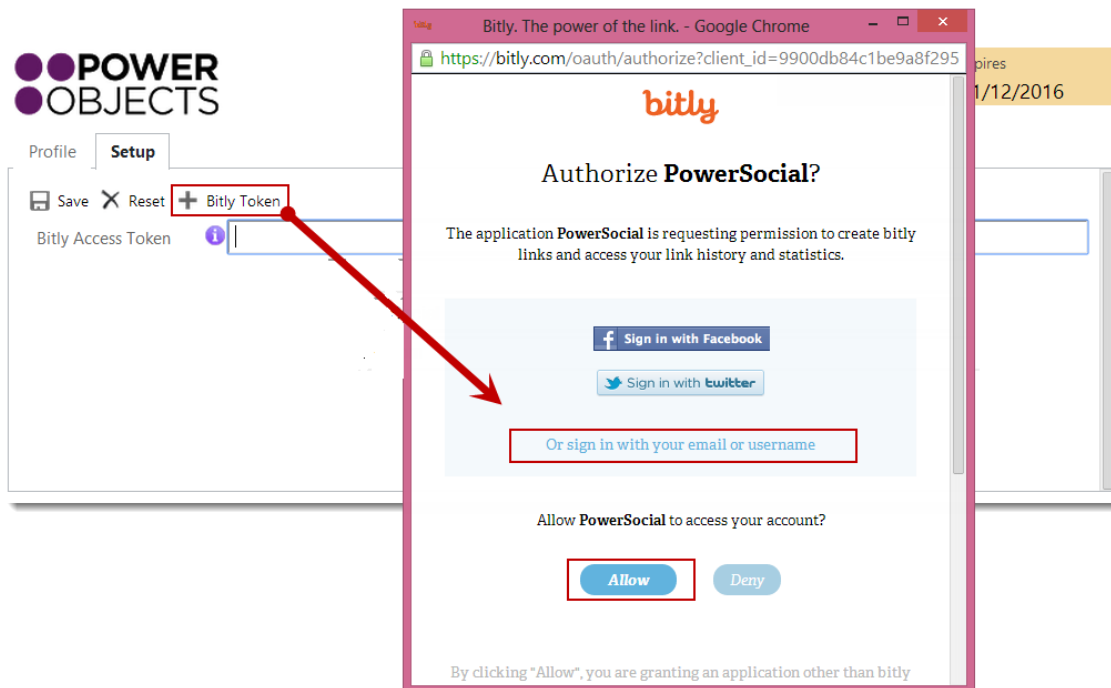
Setup

After you have registered for a free 30 day trial of PowerSocial, click on the setup tab. There, you will find the field: Bitly Access Token.

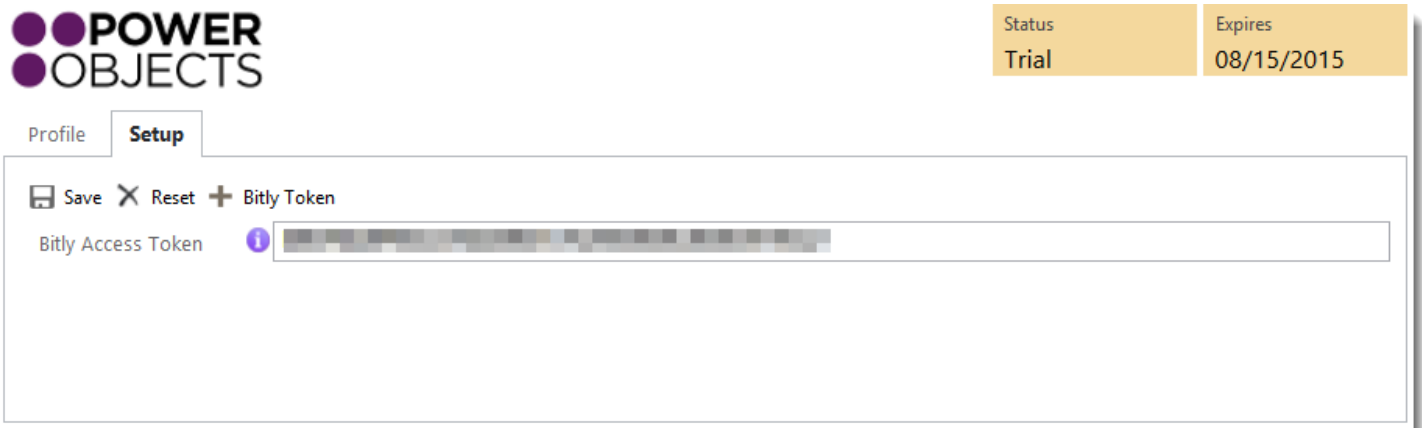


The screenshot shows the PowerSocial Setup page. At the top left is the PowerSocial logo. To the right, there are two orange boxes: 'Status Trial' and 'Expires 08/15/2015'. Below these are two tabs: 'Profile' and 'Setup', with 'Setup' being the active tab. In the 'Setup' section, there are three buttons: 'Save', 'Reset', and '+ Bitly Token'. Below these buttons is a text input field labeled 'Bitly Access Token' with an information icon to its left.

Bitly Access Token: This will connect PowerSocial with your Bitly account, or allow you to sign up for a Bitly account. First you will need to select the '+ Bitly Token' button at the top. This will prompt a new window where you can sign-in to your Bitly account and allow PowerSocial to access your account.



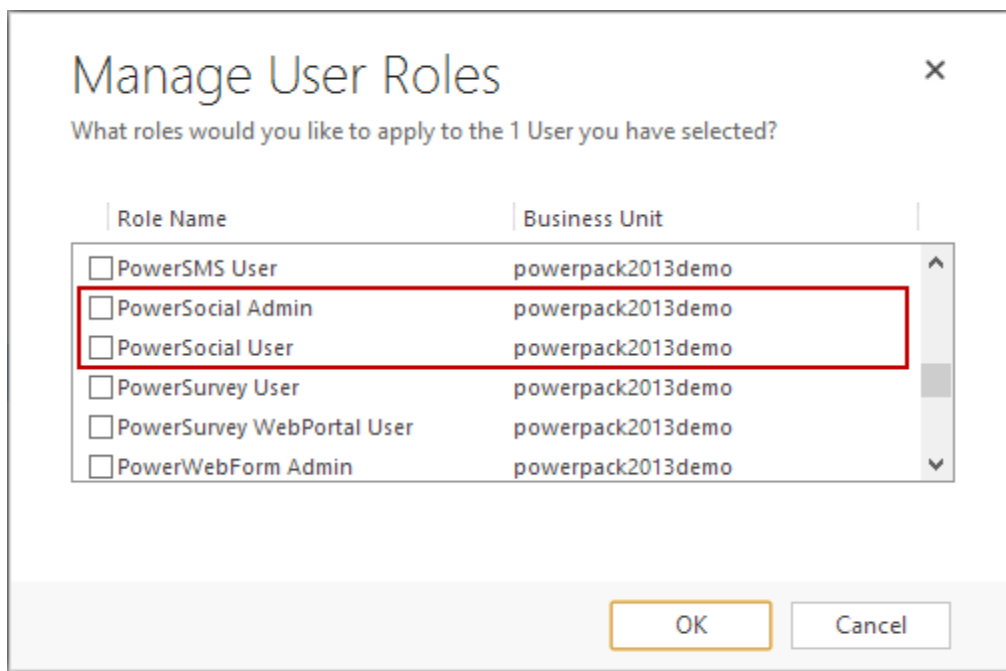
Once you select 'Allow' you will be brought back to the setup tab of the configuration screen, you will need to select the refresh token button and then your token will be populated.



The screenshot shows the 'Setup' tab of the Power Objects configuration interface. At the top right, there are two yellow boxes: 'Status' with the value 'Trial' and 'Expires' with the value '08/15/2015'. Below these, there are tabs for 'Profile' and 'Setup', with 'Setup' being the active tab. In the main area, there are buttons for 'Save', 'Reset', and '+ Bitly Token'. Below these buttons is a text input field labeled 'Bitly Access Token' with an information icon (i) to its left. The input field contains a masked token represented by a series of grey squares.

Security Roles

After you import PowerSocial, you will notice two new security roles in your CRM. The PowerSocial User security role is meant to be assigned to any CRM user who you would like to have the rights to have read and write permissions for publishers and social posts. PowerSocial Admin User role will allow the user to create Publishers, create Social Posts, and Monitor Social Feeds. The only CRM users that will be allowed to "Approve" social posts will be System Administrator(s) or a user that you have given the "Approve Posts" field security profile.



The screenshot shows a 'Manage User Roles' dialog box. The title bar says 'Manage User Roles' with a close button (X). Below the title, it asks 'What roles would you like to apply to the 1 User you have selected?'. There is a table with two columns: 'Role Name' and 'Business Unit'. The table lists several roles, with 'PowerSocial Admin' and 'PowerSocial User' highlighted by a red rectangle. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons.

Role Name	Business Unit
<input type="checkbox"/> PowerSMS User	powerpack2013demo
<input type="checkbox"/> PowerSocial Admin	powerpack2013demo
<input type="checkbox"/> PowerSocial User	powerpack2013demo
<input type="checkbox"/> PowerSurvey User	powerpack2013demo
<input type="checkbox"/> PowerSurvey WebPortal User	powerpack2013demo
<input type="checkbox"/> PowerWebForm Admin	powerpack2013demo

Uninstalling PowerSocial

To uninstall, first delete any PowerSocial Publisher and Social Post records you've created. Then uninstall as usual by deleting the solution from the solutions list in CRM.

Using the Solution

Once you have installed PowerSocial, you will see a new option set under the PowerPack section in the top command bar, called PowerSocial. In this section you will find Social Publishers, Social Posts and Social Monitor, and Social URLs. These four sections is where you will manage and post to your interactions with Twitter.

Social Publishers

Creating a Publisher

First, you will want to set up your publishers for the solution. Publishers will be able to tweet and send/receive direct messages through Twitter. To create a new publisher, go to the Social Publishers area, and click on 'New'. You can only have one social media account linked per Publisher. If you create two publisher records and link them to the same Twitter account, the older publisher record will no longer function.

For example: If you have one Twitter handle for your company (JoeCRM) and you want two people in your organization to have access to that publisher account, you can only have one JoeCRM Twitter Publisher record, if you created a publisher record for each individual with the login credentials of JoeCRM – the last publisher created would be the only publisher record that would work.

Publisher Form Fields

At the top of the Publisher record, you will notice some fields you must fill out.

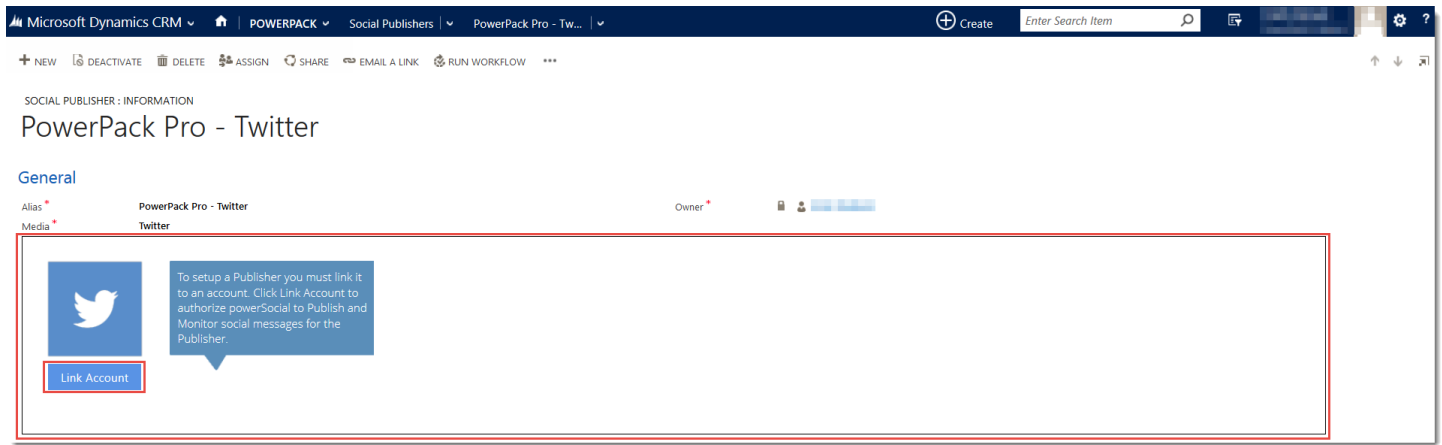
Alias

This is the internal name of the Publisher and will only be visible in CRM.

Media

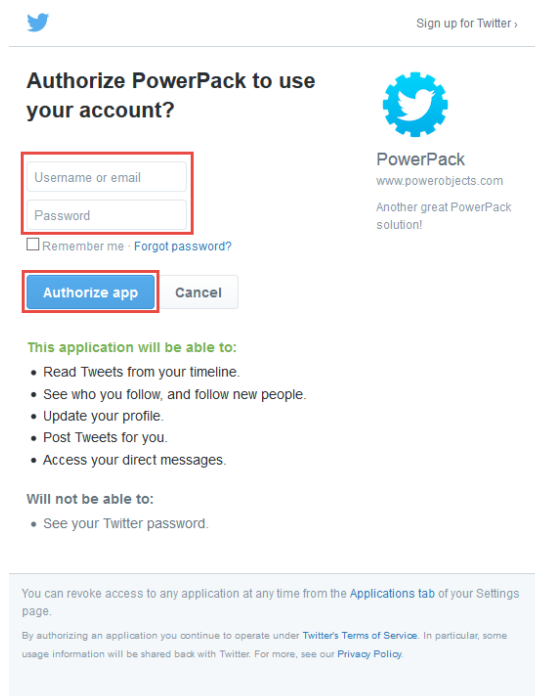
This is where you will select Twitter as your media account.

Once you have filled out the required fields you will need to save. After saving you will be able to link the publisher record a Twitter account.

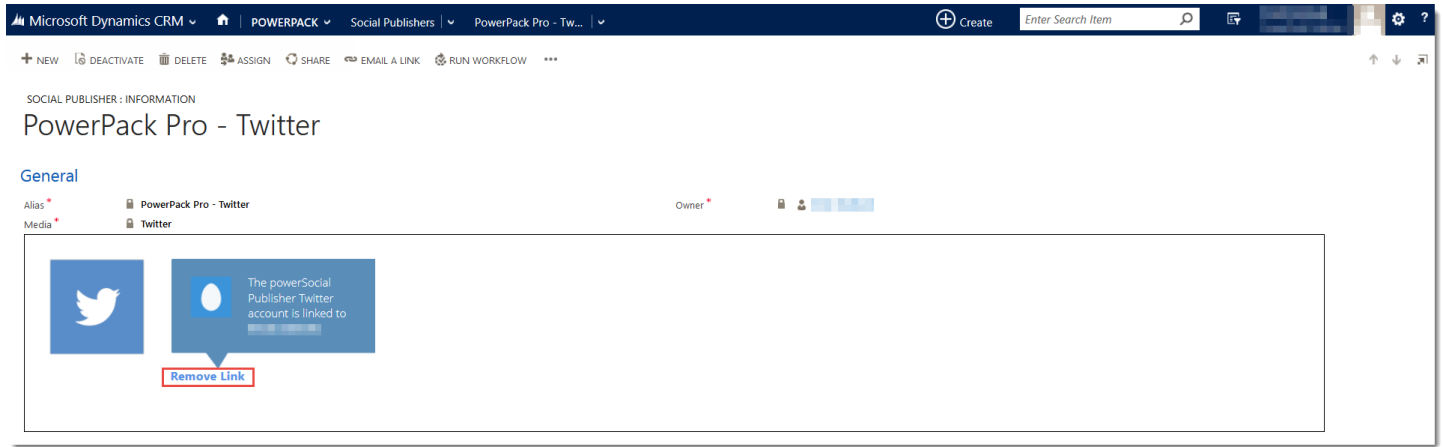


Link Account

Once you select the 'Link Account' button on the Publisher form a new window will pop-up. This pop-up will tell you what information PowerSocial will access and then provide you an area to enter your twitter login credentials:



Once you enter your credentials and select 'Authorize App' the publisher record will be automatically populated with your profile name and image. Underneath this you will be able to select the 'Remove Link' button to disconnect PowerSocial from the account you've connected it to.



Social Posts

After setting up your publishers for Twitter you will be able to create social posts and submit them to be posted. If you navigate to Social Posts and select 'New' in the upper left corner this will open a new Social Post record where you can create a Tweet or Direct Message for Twitter.

POWERPACK Social Posts New Social Post

SAVE NEW FORM EDITOR

SOCIAL POST : INFORMATION

New Social Post

Status Needs Approval

General

Owner *		Publisher *	--
Post Date	1/2/2014 11:08 AM	Approve	<input type="checkbox"/>
Campaign	--	Social Post Type *	Message

Message

--

Result

Notes

Status	Active
Active	

Owner

The owner will automatically be populated as the CRM user who is creating the Social Post

Publisher

Here you can choose which Publisher record you want the post to come from. This is the Twitter account that the post will show up on.

Post Date

Here you can choose when you want the Tweet or Message to go out. These fields allow you to select the day and time you want the Social Post to be posted. This feature allows users the ability to setup a series of tweets or Direct Messages at one time that will be posted at a future date and time. *For more information please see the "Scheduling Posts" section.*

Approve

This checkbox will only be available for system admin and users who have been granted the "Approve Posts" Field Security Profile. This checkbox must be checked in order for the post to go live on a Twitter account.

Please Note: If you have approval rights and you create a post with the required fields filled-in (not indicating a future date/time) and select "Save and Close" **with or without** checking the 'Approve' box the Social Post will be sent.

Campaign

Here you can link the social post to an existing CRM campaign or create a new campaign that you want the social post to be linked to.

Social Post Type

This is where you will decide the post type you want to create.

All Twitter accounts will have the two following options:

The screenshot shows the 'New Social Post' form in Microsoft Dynamics CRM. The 'Social Post Type' dropdown is highlighted with a red box, showing two options: 'Message' and 'Send-Direct-Message'. The form includes fields for 'Owner', 'Post Date' (7/24/2015 9:17 AM), 'Campaign', 'Publisher' (Twitter), and 'Approve'.

Twitter – Message (Tweet)

This will allow you to Tweet a message to your Twitter feed.

Twitter – Direct Message

If you want to send a Direct Message to another Twitter Account, you can do so by selecting the Post Type: Send-Direct-Message. Once you select this option you will have to enter a User Screen Name. When entering the User Screen Name you must add the @ symbol in front of the user name.

Please Note: If you would like to send a direct message, you must be following the user you are sending the message to.

The screenshot shows the 'New Social Post' form in Microsoft Dynamics CRM. The 'User Screen Name' field is highlighted with a red box, showing the value '@joeCRM'. The form includes fields for 'Owner', 'Post Date' (7/24/2015 9:17 AM), 'Campaign', 'Publisher' (Twitter), and 'Approve'.

Message

This is where you will write the actual post that you want to be posted on the social media site. Please note that character limits still apply and there is a count for number of characters under the text box. To utilize the bitly enhancement simply paste your URL in the 'Message' field and press space, PowerSocial will automatically convert the link to a bitly link.

Result

This field will be populated with a message letting you know if the Social Post has been successfully posted to the social media site or not. If the post failed the reason or error will be listed here.

Please Note: social posts are not instant, they can take a few minutes to process and post.

Scheduling Posts

One unique feature of PowerSocial is the ability to schedule out posts. Being able to schedule out posts enables users to set up posts for a week in the future, two weeks, or whatever amount of time they choose. This will remove the daily inconvenience of having to Tweet and allow you to select the prime time of day to have the Social Post go out. Never go a day without contributing or keeping current in the social media world.

To setup a series of posts simply use the Social Posts record to create the Tweets that you want to post and edit the 'Post Date' to the time and date you want the post to go out.

Note: If you schedule a post, the time zone of the date/time on the post will reflect the time zone of the owner.

Social Monitoring

With this Social Monitor you will be able to see what your connections are talking about real-time from right within CRM. The neat thing about the social monitor section is that it gives you the ability to easily retweet, respond, and filter social posts from right within CRM. Also, if you see a contact that is not in your CRM system and they should be, you can select to add them to CRM from the social monitoring screen, which will create a new record for that contact or lead.

Microsoft Dynamics CRM | POWERPACK | Social Monitor

NEW ACTIVITY | NEW RECORD | IMPORT DATA

powerSocial Monitor **Setup monitor boards**

Remove a monitor board

Shows what data the feed is pulling

Twitter :: @joecrm

Ken @ken1ceo 16h
@joecrm Great quote! So true
Expand

PowerObjects @joecrm 22h
Gain tips+tricks from #MSDYNCRM all-stars at #PowerUpCRM Event! Special pricing till 10/15! <http://bit.ly/1hChkqY> <http://t.co/do2QQmhsn6>
Retweeted by Nikita Polyakov
View photo

PowerObjects @joecrm 22h
Gain tips+tricks from #MSDYNCRM all-stars at #PowerUpCRM Event! Special pricing till 10/15! <http://bit.ly/1hChkqY> <http://t.co/do2QQmhsn6>
Retweeted by Jessica Noble, CCXP
View photo

Inogic @inogic 22h
By @joecrm > Exporting Data to Re-import: The Invalid Column Headings Issue <http://www.powerobjects.com/2015/07/20/exporting-data-to-re-import-the-invalid-column-headings-issue> #MSDYNCRM
Expand

PowerObjects @joecrm 20 Jul
Displaying some new hardware from #WPC15. Huge thank U 2 @msPartner, our customers and employees who make this happen <http://t.co/OcPP2rzRCT>
Retweeted by Abraham Saldana

Twitter :: directmessages

CRM Kris @KBWanKenobi 17 Jul
Have you seen the latest PowerGrid solution? Check it out: <http://bit.ly/1ObPgWv>

Twitter :: #powerobjects

Adam @adamjhallbeck 22 Jul
Get your #MSCRM on with #PowerObjects this fall at #PowerUp! Can't find this kind of value anywhere else. <http://bit.ly/1KI6PCR>
Retweeted by PowerObjects
Expand

Adam @adamjhallbeck 22 Jul
Get your #MSCRM on with #PowerObjects this fall at #PowerUp! Can't find this kind of value anywhere else. <http://bit.ly/1KI6PCR>
Expand

PowerObjects @joecrm 21 Jul
#PowerObjects is hosting a Blood Drive for @AmericanCross on 7/24 from 9-3pm at our Mpls HQ. Schedule your appt: <http://rdcrss.org/1MiTiEy>
Retweeted by Rizwan haider
Expand

PowerObjects @joecrm 21 Jul
#PowerObjects is hosting a Blood Drive for @AmericanCross on 7/24 from 9-3pm at our Mpls HQ. Schedule your appt: <http://rdcrss.org/1MiTiEy>
Expand

Waheed @WaheedUIHaq 15 Jul
Retweeted Scribe Software (@scribesoft): Way to go #PowerObjects for #winning the Americas - 2015 Scribe Online Top Partner award!
Retweeted by Rizwan haider
Expand

PowerSocial Monitor

If you select the Social Monitor page you will get a blank screen with a title in the upper left-hand corner 'PowerSocial Monitor +' If you click on the icon a pop-up will appear and you can select which publisher account and information you want to monitor.

Microsoft Dynamics CRM | POWERPACK | Social Monitor

NEW ACTIVITY | NEW RECORD | IMPORT DATA

powerSocial Monitor **+**

Select Publisher

PowerPack Pro - Twitter

☐ Profile

☐ Favorites

☐ Direct Messages

☐ #tag

☐ @person

Monitor Cancel

Twitter Monitoring Options

Profile

Here you can choose to monitor the profile feed of the selected publisher

Favorites

Here you can choose to monitor the 'Favorites' of the publisher's twitter account

Direct Messages

Here you can monitor sent and received direct messages

#tag

Here you can search twitter by #tags

@person

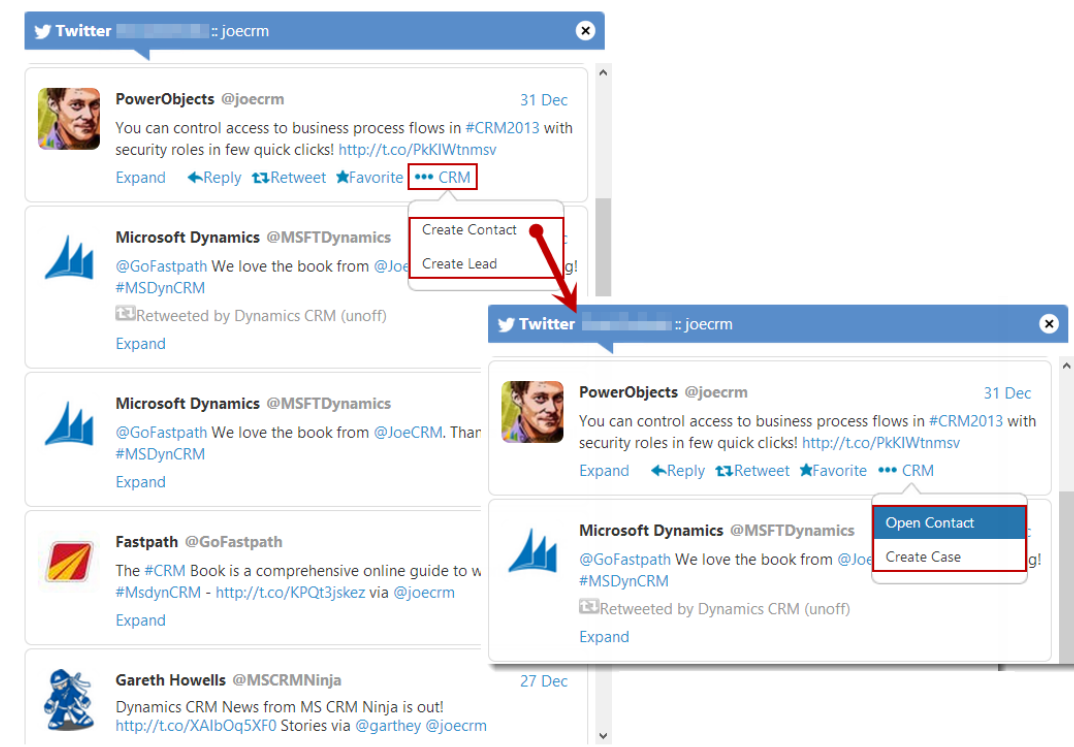
In this section you can set up monitors to filter by @person

You can add a mix of as many or as few Social Monitor boards from Twitter. This view is by user and will stay populated if you leave the page and return. If you want to clear your monitor selections, you can simply remove monitor boards by selecting the 'X' in the top right corner of the feed.

Note: You are only able to monitor publishers that you are the owner of

Adding a Contact or Lead from the Social Monitor board

When you hover over individual posts on your Social Monitor board, a button '...CRM' will appear. If you click on this a dropdown will appear. From there you can select 'Create Contact' or 'Create Lead'



Create Contact

If you choose to create a contact, it will take the information available on the person and create a new contact record and assign you as the owner. Once you add someone as a contact (or if someone is already a contact) in your CRM system, if you hover over the '...CRM' button you will have two new options.

Open Contact

With this option you can open the contacts' record right from within the PowerSocial Monitor

Create Case

With this option you can create a case regarding the contact and specific post

Create Lead

If you choose to create a lead, it will take the information available for that person and create a new lead record and assign you as the owner. Once you add someone as a lead (or if someone is already a lead) in your CRM system, if you hover over the '...CRM' button you will have an additional option.

Open Lead

This option will allow you to open the lead's record right from the PowerSocial Monitor

Additional Monitoring Abilities

Under each post in your Social Monitor, depending on which media outlet you are monitoring, you will have additional functionality.

Twitter

When monitoring the Twitter-sphere, you have many different options to interact with your audience

Reply

With the reply option Dynamics CRM users have the ability to reply to tweets in real-time

Retweet

If you find a tweet that is worthy of a retweet, simply select the retweet button to retweet the original tweet

Favorite

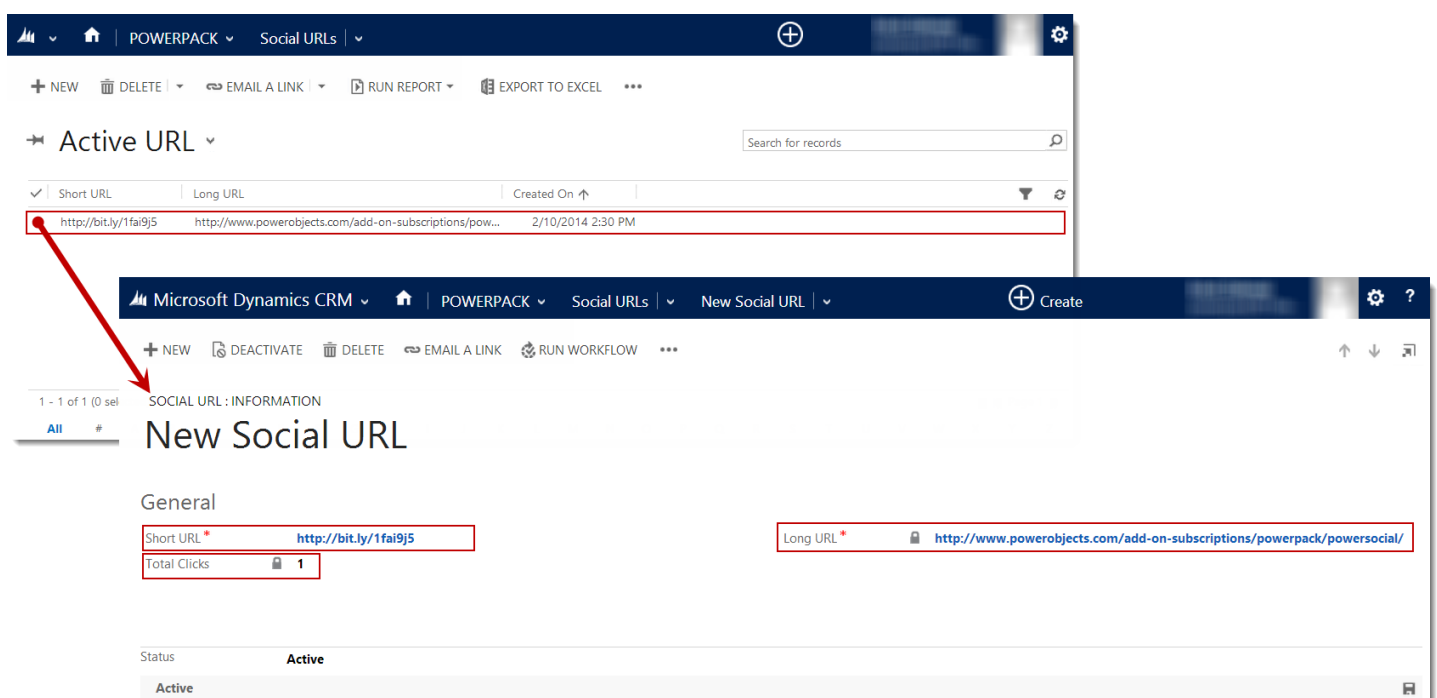
This option allows PowerSocial users to favorite tweets right from within Dynamics CRM

Follow

This gives PowerSocial users the option to follow other LinkedIn users.

Social URLs

With the Social URLs section users can track the links that have been added to social posts via PowerSocial and see how many clicks have been taken on the bitly URL. Simply select the URL you would like tracking information on and its Social URL record will open, telling you the short URL used, original URL and the total clicks taken.



Thanks for your interest in PowerSocial. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of installation. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged \$1/CRM user/month.

Interested in more CRM tips and tricks? Check out our [blog](#) or subscribe to our [newsletter](#).