POWER OBJECTS

USER GUIDE

PowerSocial

Service Support Education Add-ons

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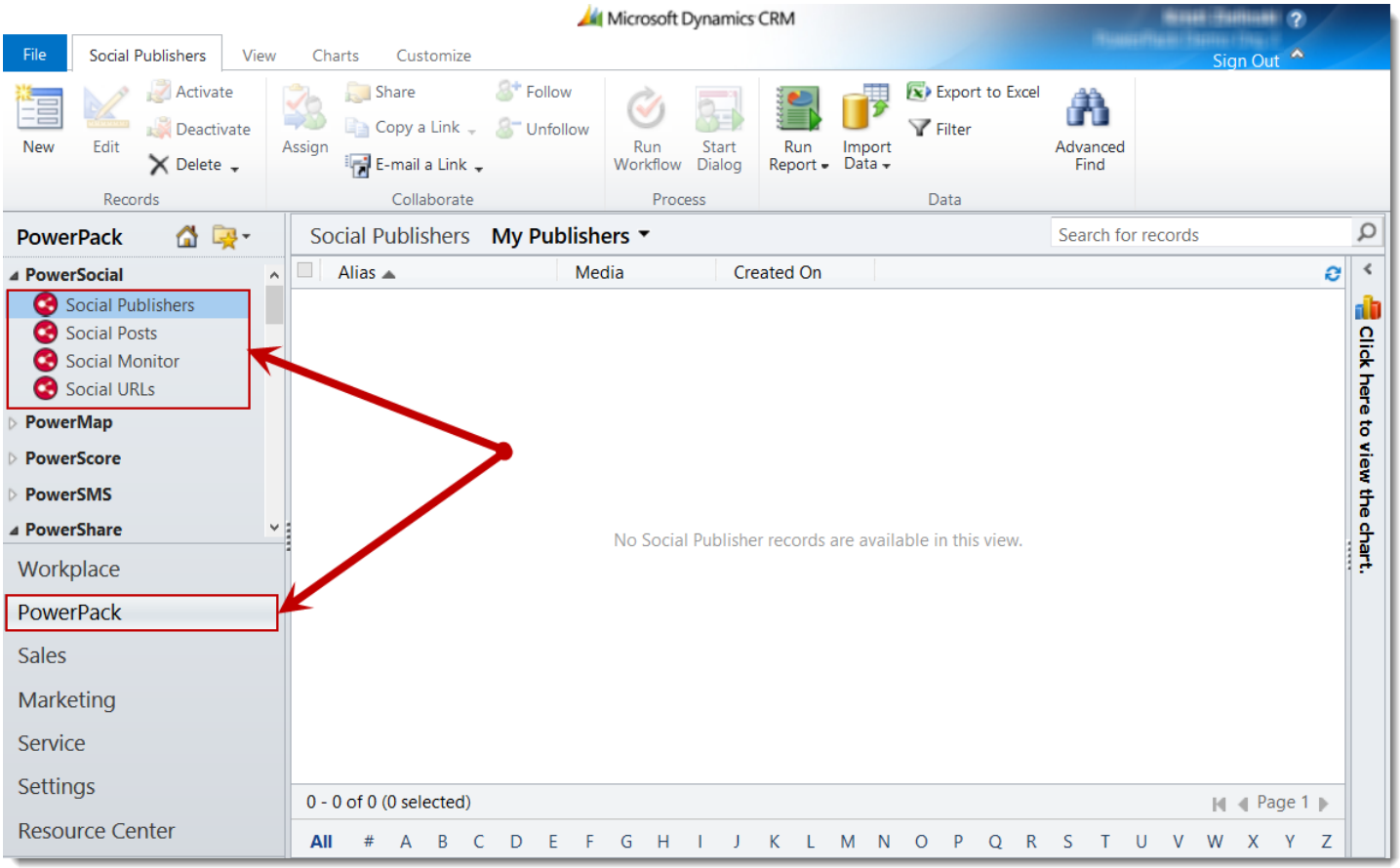
Overview

Once you have installed PowerSocial, you will see a new option set under the PowerPack section in the left hand navigation pane, called PowerSocial. Under that tab you will find Social Publishers, Social Posts and Social Monitor and Social URLs. These four sections are where you will be able to manage and post to your social media outlets.



Social Publishers

Creating a Publisher

First, you will want to set up your publishers for the solution. Publishers will be able to create tweets and posts for Facebook, LinkedIn and Twitter. To create a new publisher, go to the Social Publishers area, and click on New. You can only have one LinkedIn or Twitter account linked per Publisher. If you create two publisher records and link them to the same LinkedIn or 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.

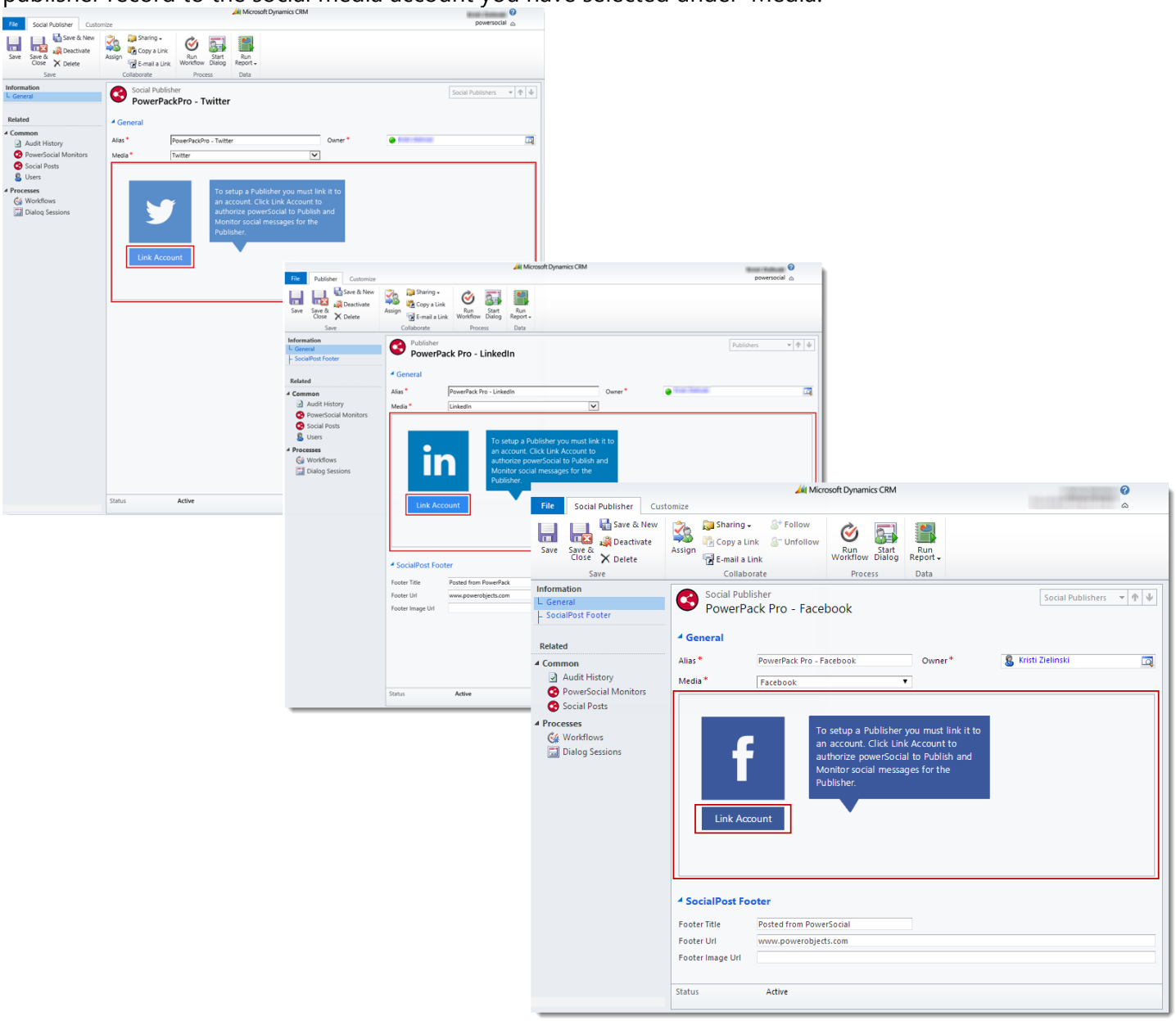
Alias

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

Media

This is where you can select whether you will be linking the publisher record to a Facebook Account, LinkedIn Account or Twitter 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 to the social media account you have selected under 'Media.'



If you are creating a publisher for LinkedIn or Facebook, you will notice three extra fields on the post:

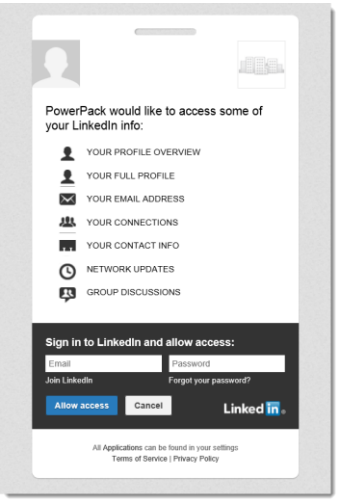
Footer Title: This is the title that is displayed on the bottom of the LinkedIn Post from this publisher.

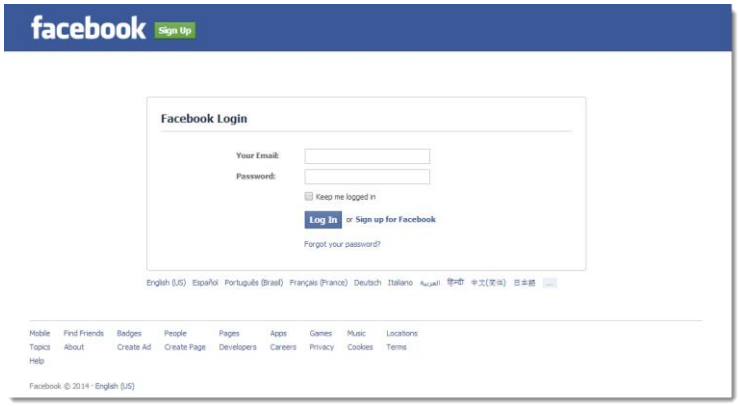
Footer URL: This is the URL that is displayed on the bottom of a LinkedIn Post from this publisher.

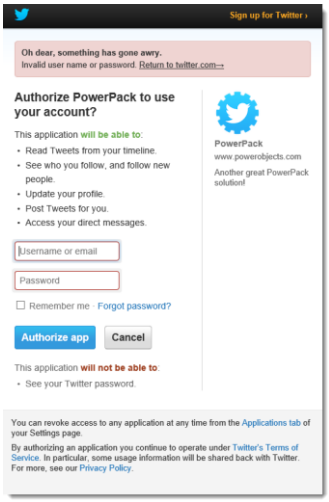
Footer Image URL: This is the image that is displayed at the bottom of the LinkedIn post from this publisher.

Link Account

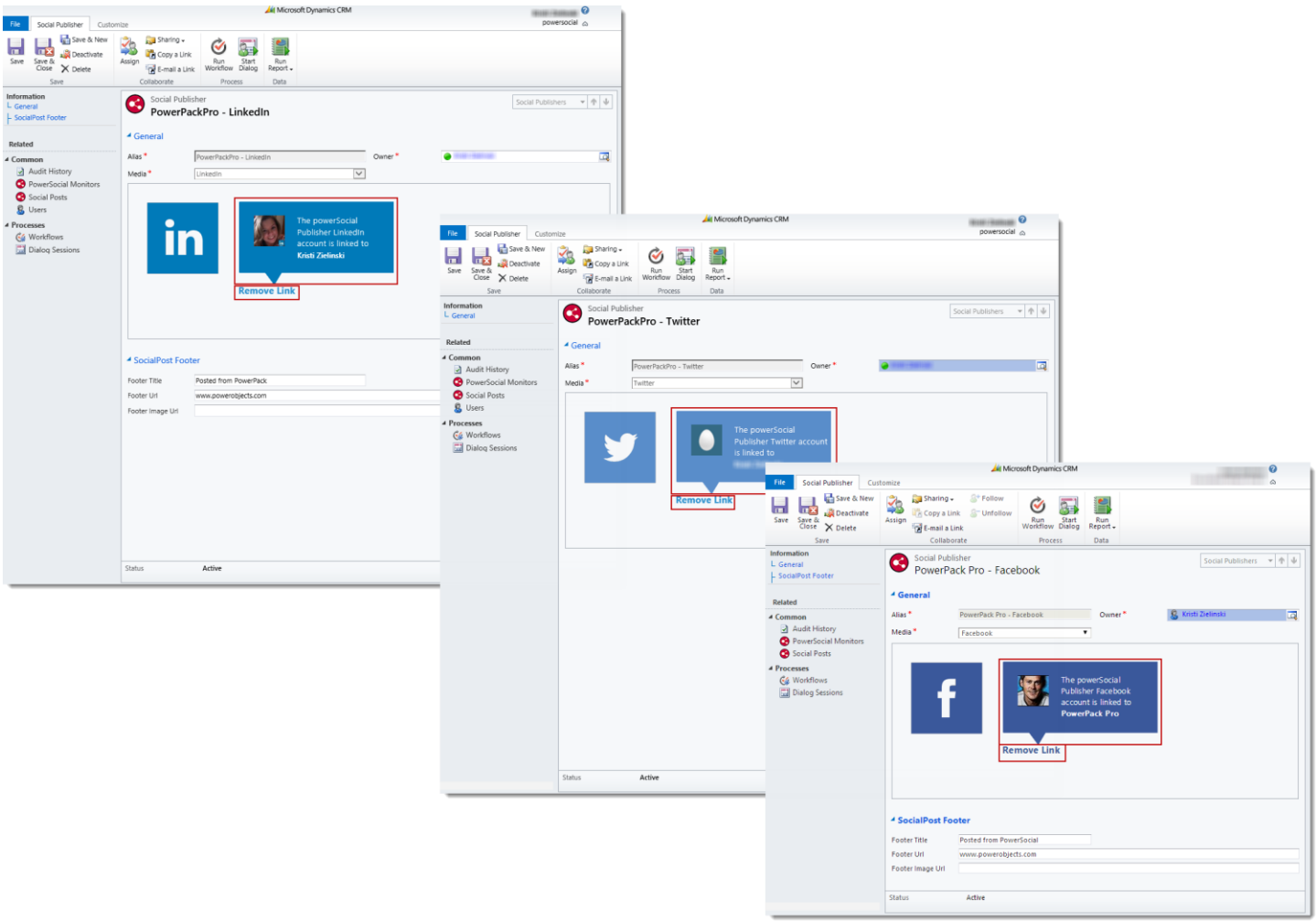
Once you select the 'Link Account' button on the Publisher form a new window will pop-up. This pop-up will tell you what information PowerSocial will access and then provide you an area to enter your login credentials:







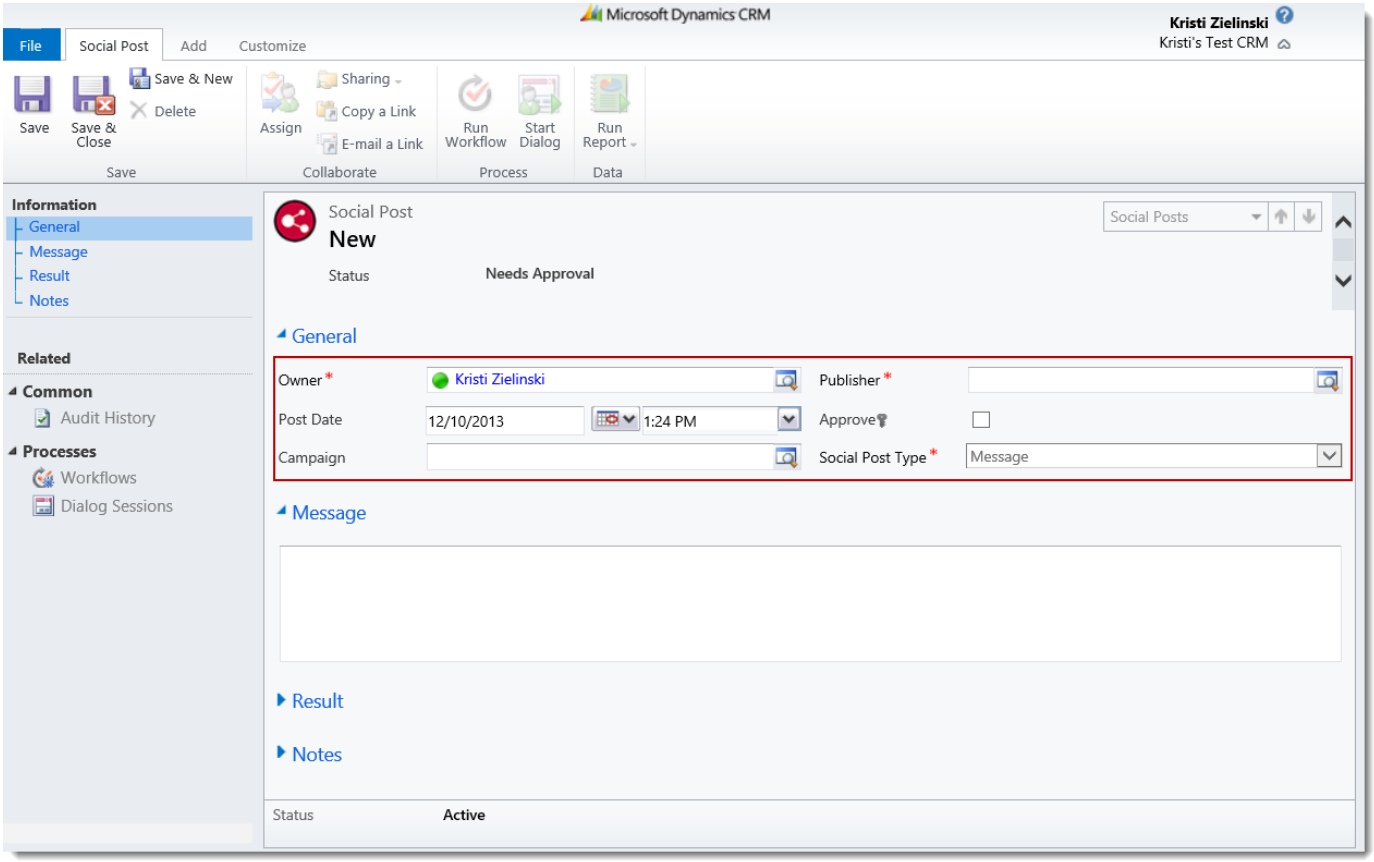
Once you enter your credentials and 'Allow Access,' 'Authorize App' or 'Log In' you will need to refresh the page and then the publisher record will be populated with your profile name and image. Underneath this you are able to select the 'Remove Link' button to disconnect PowerSocial from the account you've connected it to.



Please Note: *The LinkedIn publisher link will expire every 60 days, so you will need re-visit LinkedIn publisher records to re-link the publisher to their LinkedIn account every two months. This does not apply to Twitter or Facebook publisher records.*

Social Posts

After setting up your publishers for Facebook, LinkedIn and 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 post for either Twitter, LinkedIn or Facebook.



Please Note: *You cannot post to multiple social media sites with one Social Post – instead you will need to create separate Social Posts for each social media outlet (Twitter, LinkedIn and Facebook).*

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 social media account that the post will show up on.

Post Date

Here you can choose when you want the post 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 posts 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 social media site.

Please Note: *If you have the approval rights, and you create a post with the required fields filled-in then select "Save and Close" <u>with or without</u> 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 one that you want the post to be linked to. If you do link a post to a campaign, you will see the social posts related to that campaign, on the campaign record.

Social Post Type

This is where you will decide what social media outlet you want the Social Post to be posted on. The post type options available to you will differ depending on what type of account the Publisher is hooked to:

Twitter Publishers only have one option: 'Message.'

LinkedIn Publishers will have the two following options:

LinkedIn – Message

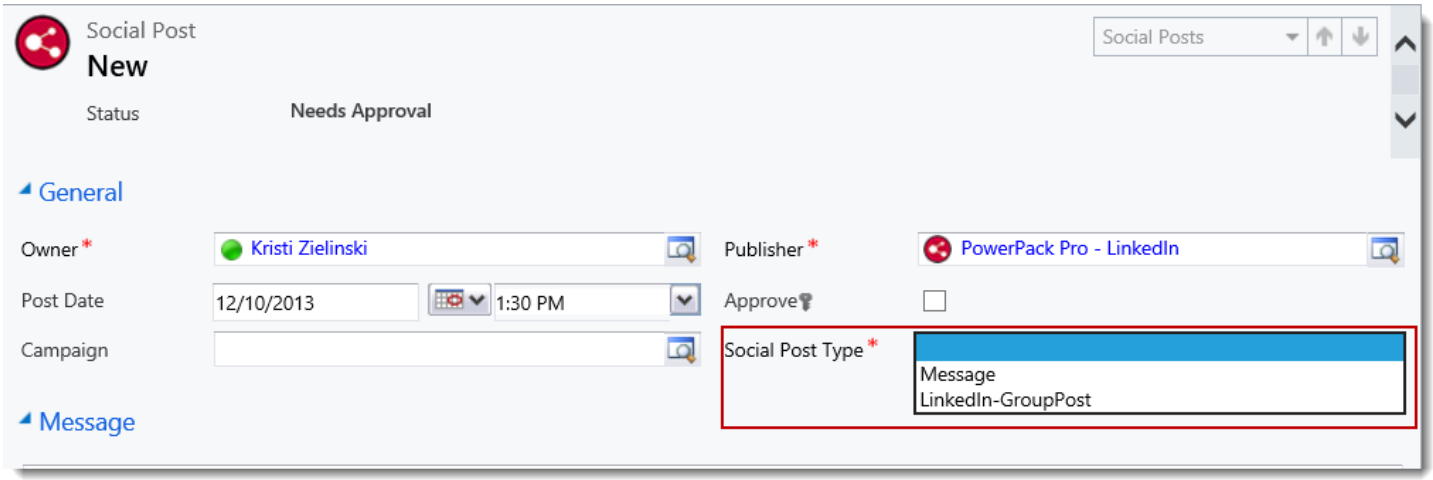
This will allow you to post a LinkedIn status to the publisher's profile.

LinkedIn – Group Post

If you want to post a status to a group that you Manage, Moderate or are a Member of select this option. Once selected a new field will be added to the Social Post record labeled 'Select a Group'.

Select a Group

Here you will find a list of groups connected with the LinkedIn account that the Publisher is connected with. You can select which group you would like the social post to be posted to.



Facebook Publishers will have the two following options:

Facebook – Message

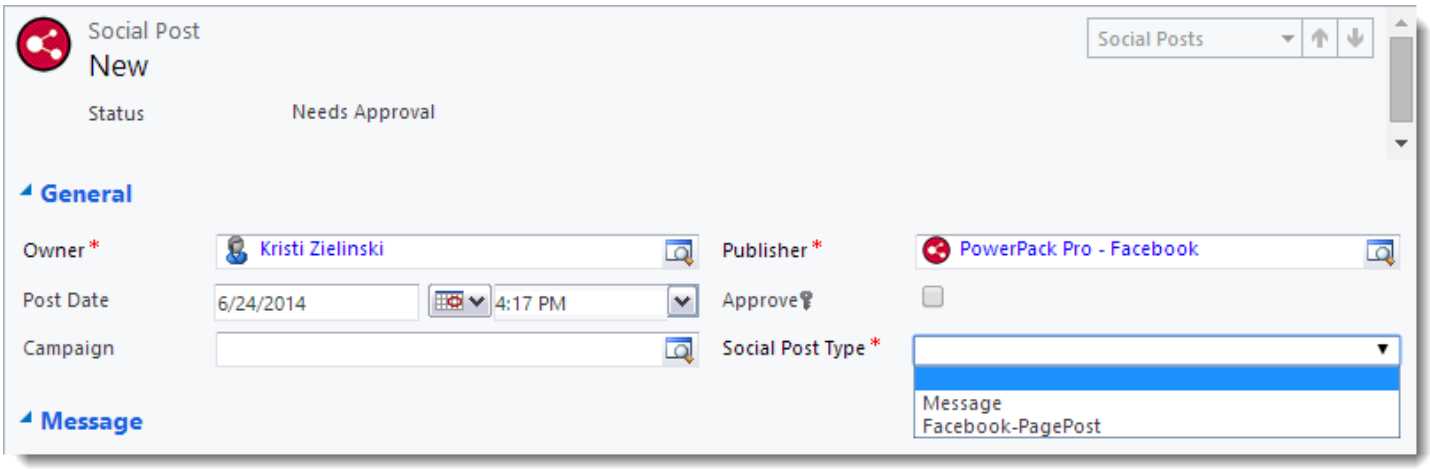
This will allow you to post a Facebook status to the publisher's profile.

Facebook – Page Post

If you want to post a status to a page that you manage or moderate select 'Facebook – Page Post' from the Social Post Type dropdown. Once selected a new field will be added to the Social Post record labeled 'Page'.

Select a Page

Here you will find a list of groups connected with the LinkedIn account that the Publisher is connected with. You can select which page you would like the social post to be posted to.

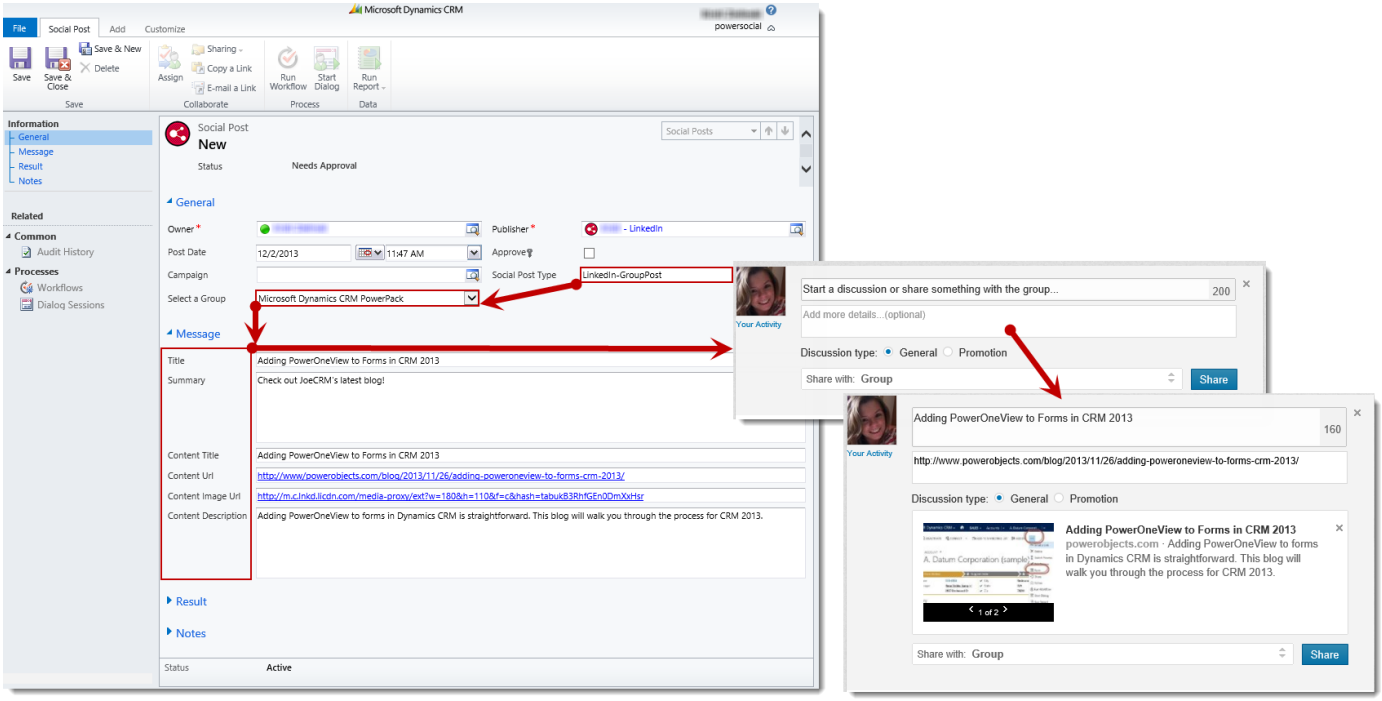


Message

This is where you will write the actual post that you want to be posted on the social media site.

For Twitter, LinkedIn and Facebook statuses the messages field will simply be a multi-line text box that you enter your post, status or tweet. Please note that character limits still apply and there is a count for the number of characters underneath the text box. To utilize the bitly enhancement, simply paste your URL in the Message box and press space, PowerSocial will automatically convert the link to a bitly link.

If you are posting to a LinkedIn-Group the Message Tab will expand with additional fields that you will need to fill out for a post to be successfully added to the LinkedIn Group.



Title

This is where you will add the main title. In LinkedIn this field is the one that states, "Start a discussion or share something with the group…" You have a limit of 200 characters for this field.

Summary

This field is the equivalent of LinkedIn's "Add more details… (Optional)" field.

Content Title

If you were to add a URL in the "Add more details… (Optional)" field in LinkedIn information would be dynamically created for your post in LinkedIn. In PowerSocial you will need to add this information manually. So 'Content Title' is the equivalent of the dynamic title that would populate from the URL link.

Content URL

Here you will want to enter the URL to the additional content you are posting on LinkedIn.

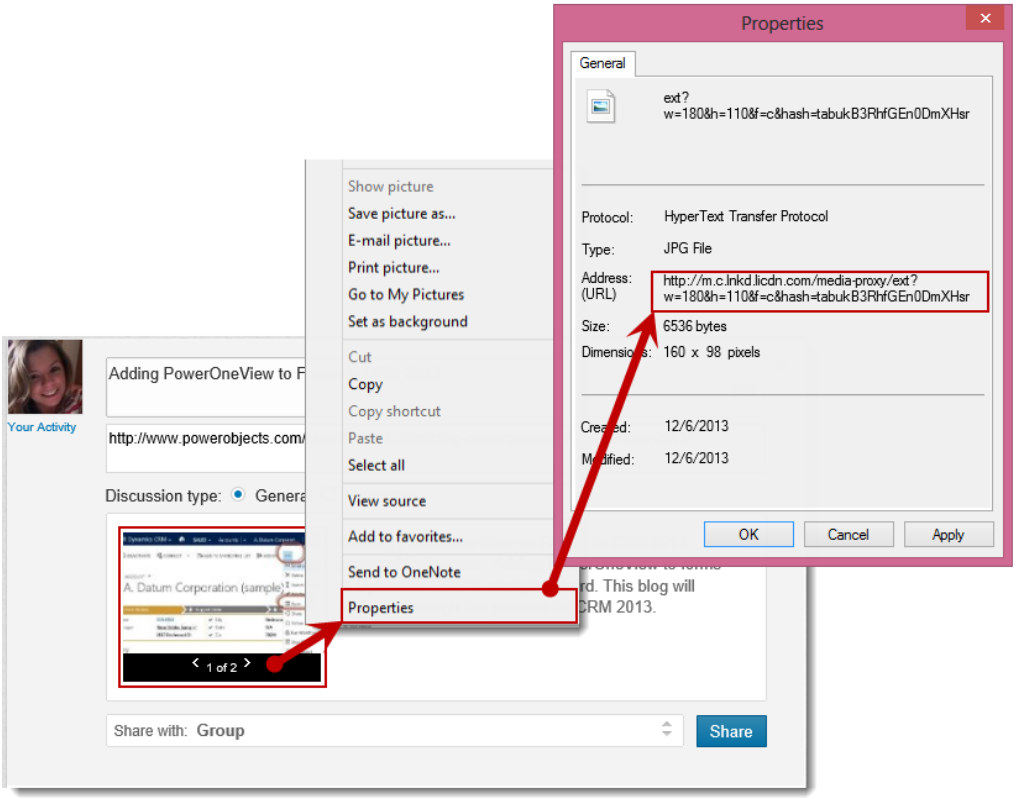
Content Image URL

If your URL has images that correspond with it, LinkedIn will create a thumbnail to associate to your post. This field is for that image's direct URL.

This field is optional, but if you would like to include a thumbnail with your Social Post you will need to follow these steps:

1. In LinkedIn navigate to the group you are posting the Social Post to.
2. Add your content URL to the "Add more details…(optional)" field, doing this will create dynamic information from the URL including 1 or more thumbnail images
3. Choose which photo you want to associate with the post.
4. Right click on the image and select 'Properties'

5. Copy the 'Address: (URL)' field
6. Navigate to your social post and add the copied URL to the 'Content Image URL'



Content Description

This field is where you can add the dynamic description that the URL from the "Add more details… (Optional)" field in LinkedIn created.

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 will enable 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 or post information to LinkedIn 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.

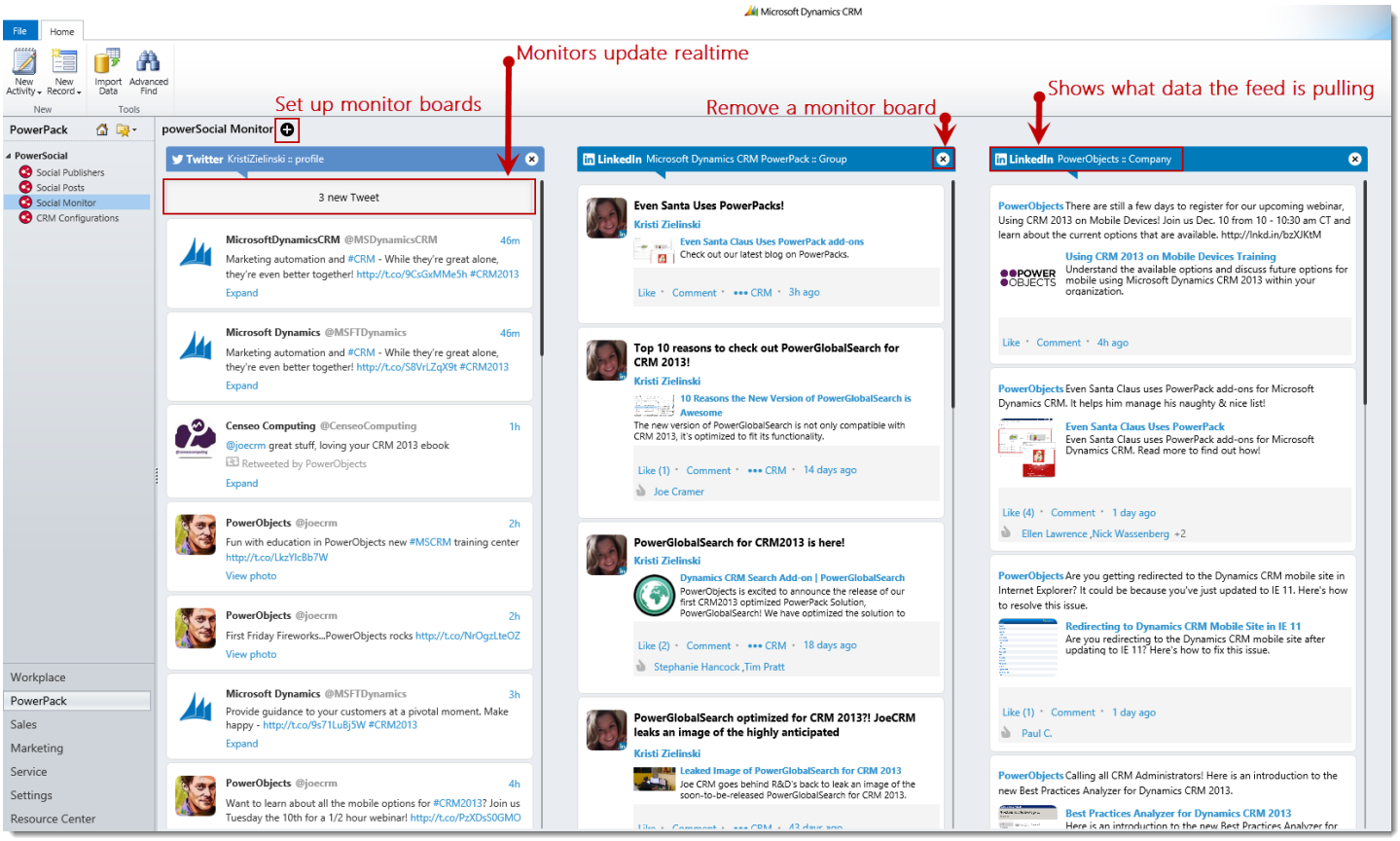
To setup a series of posts simply use the Social Posts records to create the messages and tweets that you want to deliver to your social media outlets and

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.*

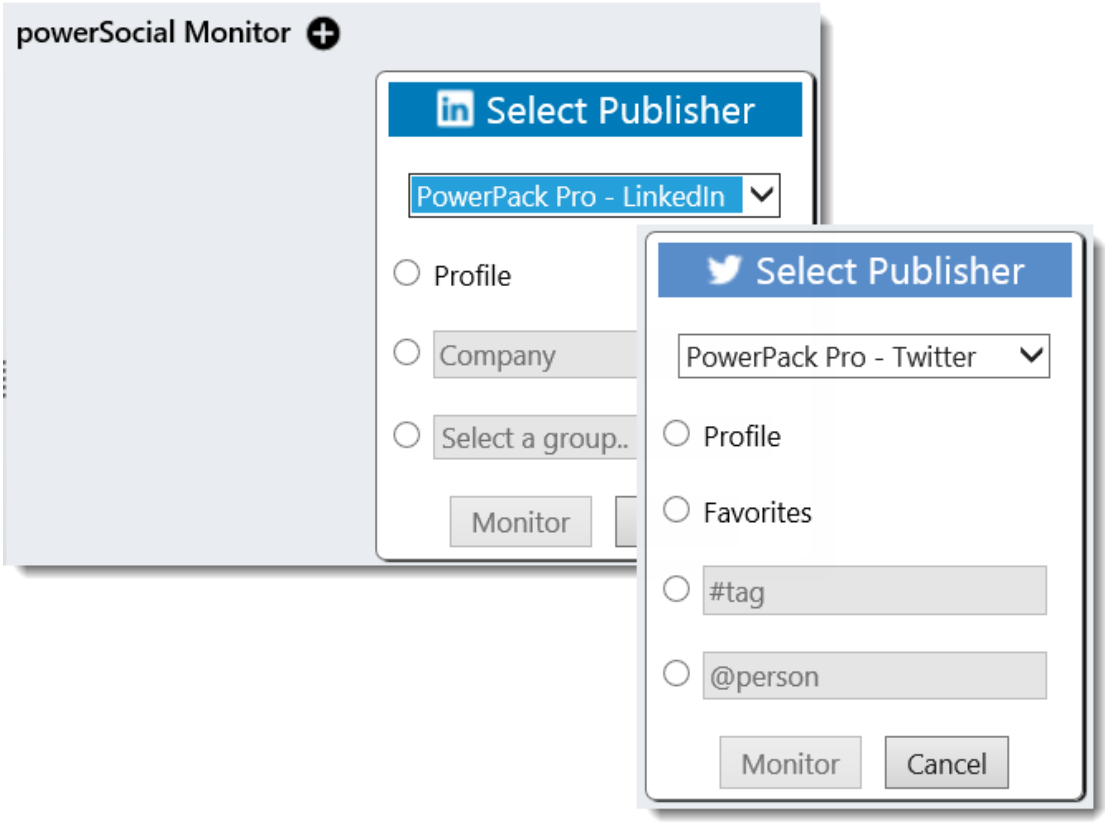
Social Monitoring

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.



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 popup will appear and you can select which publisher account and information you want to monitor.



Facebook Monitoring Options

Wall

Here you can choose to monitor your profile wall of the selected publisher

Newsfeed

You can monitor the newsfeed of the selected Publisher's Facebook account

Page

This section you can monitor by pages that the Publisher is an owner/manager of, or likes

LinkedIn Monitoring Options

Profile

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

Company

You can search and create monitors per company that you want to follow

Group

This section you can monitor by groups that the Publisher is a part of

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

#tag

Here you can search twitter by #tags

@person

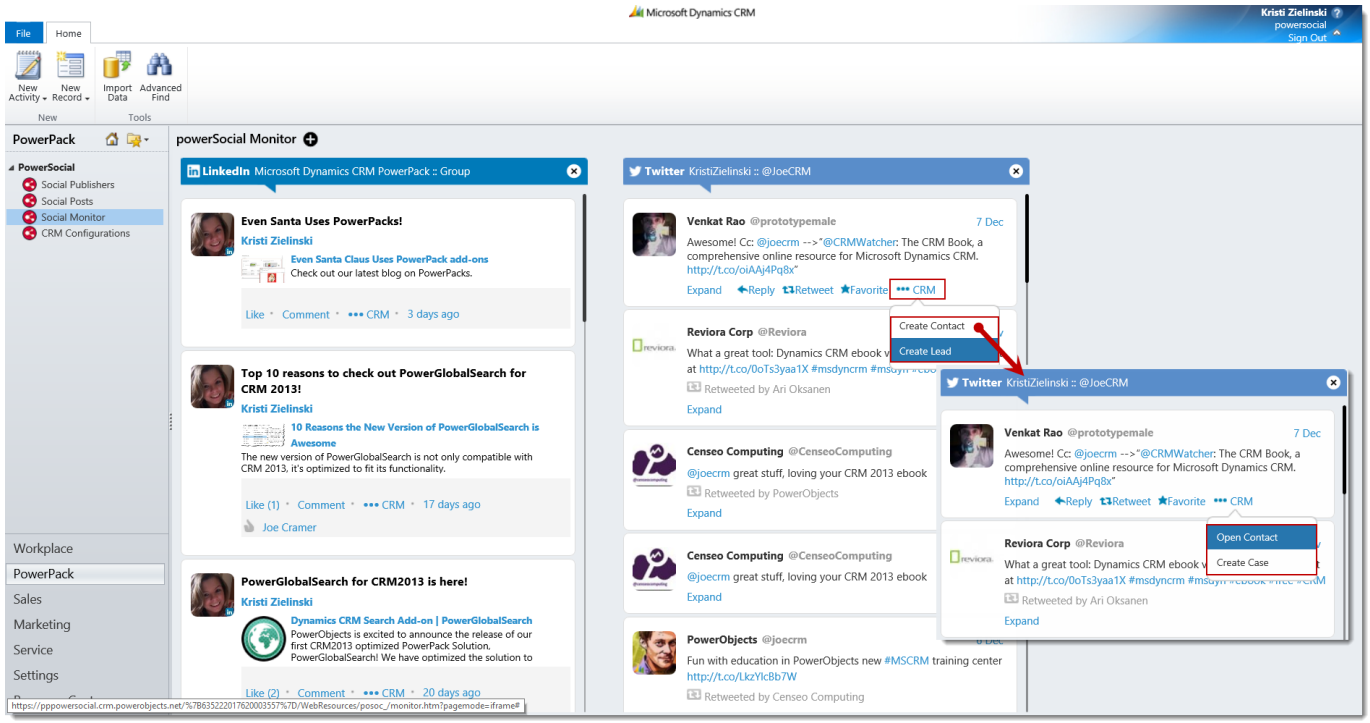
In this section you can set up monitors to filter by @person

You can add a mix of as many or as little Social Monitor boards from Facebook, LinkedIn and 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 monitors by selecting the 'X' in the top right corner of the feed.

Note: *You will only be 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 said 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 you 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 running a monitor, you will have additional functionality.

Facebook

When monitoring Facebook pages, walls and newsfeeds you have a few additional options

Like

This option allows you to like comments posted by Facebook users

Comment

This give PowerSocial users the ability to comment real-time on posts from Facebook users

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

Re-tweet

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

Favorite

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

LinkedIn

When monitoring LinkedIn profiles, companies and groups you have a few additional options

Like

This option allows you to like comments posted by LinkedIn users

Comment

This gives PowerSocial users to comment real-time on posts from LinkedIn users

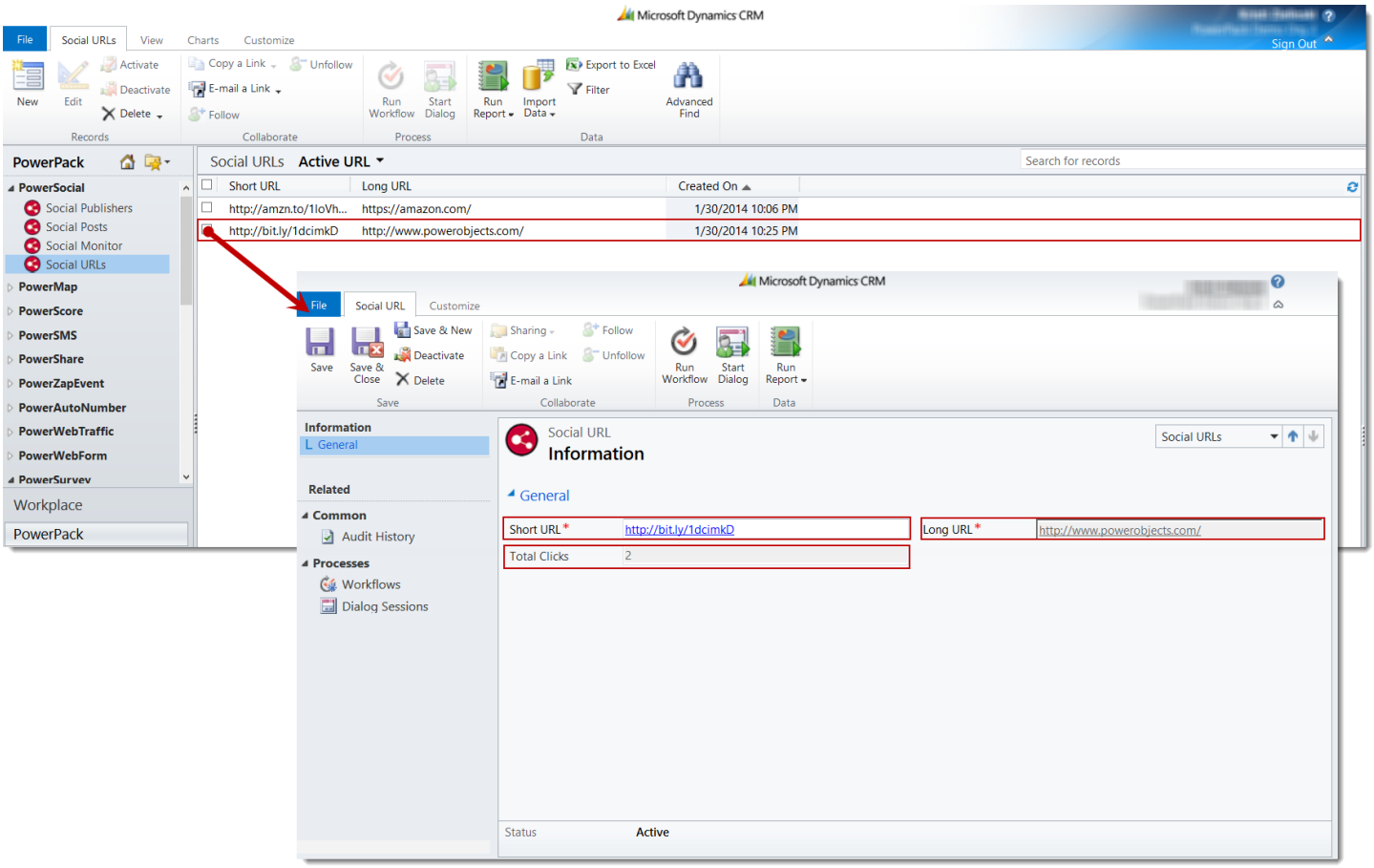
Follow

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 click 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.