



# SOCi User Guide

Your go-to resource for navigating the platform

## Welcome to SOCi!

SOCi, the leading all-in-one platform built specifically for marketers like yourself! Use this guide to get started quickly with your social and reputation networks.

## How to log in

Logging into the SOCi platform will provide you with access to link all of your social and reputation networks. Additionally, you will be able to create and schedule posts, respond to all engagements (comments and messages), respond to all reviews, access shared library content, and pull reports on how your networks are performing. Each user will receive a welcome email with instructions on how to set up their password.

[Click here](#) to log in to SOCi or go to [app.meetsoci.com](http://app.meetsoci.com) to log in.

### Is it your first time logging in?

Click the forgot password link if this is your first time logging in to create your password.

You will then receive an email enabling you to set your password. This link will redirect you back to the login screen.

### Have you logged in before but don't remember your password?

No worries! Once on the login page, simply click the forgot password link.

The screenshot shows the SOCi login interface. At the top is the SOCi logo. The main heading is 'Sign In'. Below this, there are two input fields: 'Email' (with a sub-label 'Email Address') and 'Password'. A dark 'Sign In' button is positioned below the password field. At the bottom of the form, there is a link for 'Sign in with SSO'. Below the form, there are two links: 'Forgot password? Click Here' and 'Need an account? Contact Us'.

## Access SOCi on mobile, desktop or tablet

Execute all of your review and listings activities from the device that you're used to! Log into **SOCi** on any device by opening up a browser and visiting [app.meetsoci.com](http://app.meetsoci.com) or download the SOCi Go! app in the [Apple Store](#) or [Google Play](#).

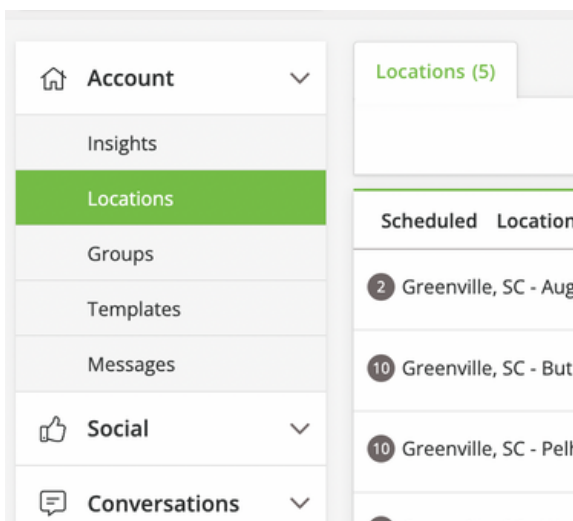
The following resources will show you how to complete tasks on your desktop, but the steps will be the same on your mobile or tablet device. To access the menu on mobile or tablet, simply click the hamburger icon ☰ in the top corner.

## Dashboard

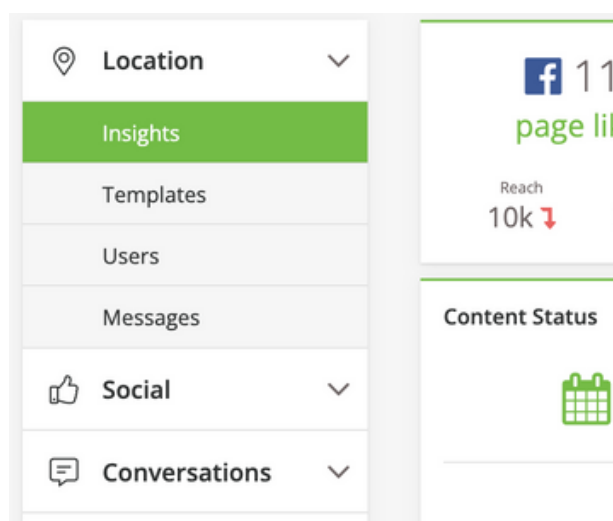
Once you log in, depending on your access, you will be brought to the Account or Location level. If you are a manager of one location, then you will automatically advance into the Location tab. If you are a manager of multiple locations, then you will be advanced into the Account level first.

- **Account Tab:** If you are a manager of multiple locations, you will be advanced into the Account level first. Here you will have the Insights dashboard metrics over the entire account.
- **Location Tab:** This is where you will have a list of any locations you have access to. This will allow you to schedule content at the location level.
- **Groups Tab:** If you're a manager of multiple locations within SOCi, you can group locations together in a way that best suits your strategy. For instance, you can group by region, state, etc. By grouping locations together, you will have the option to schedule content at the group level and more!

### View for multi-location owners

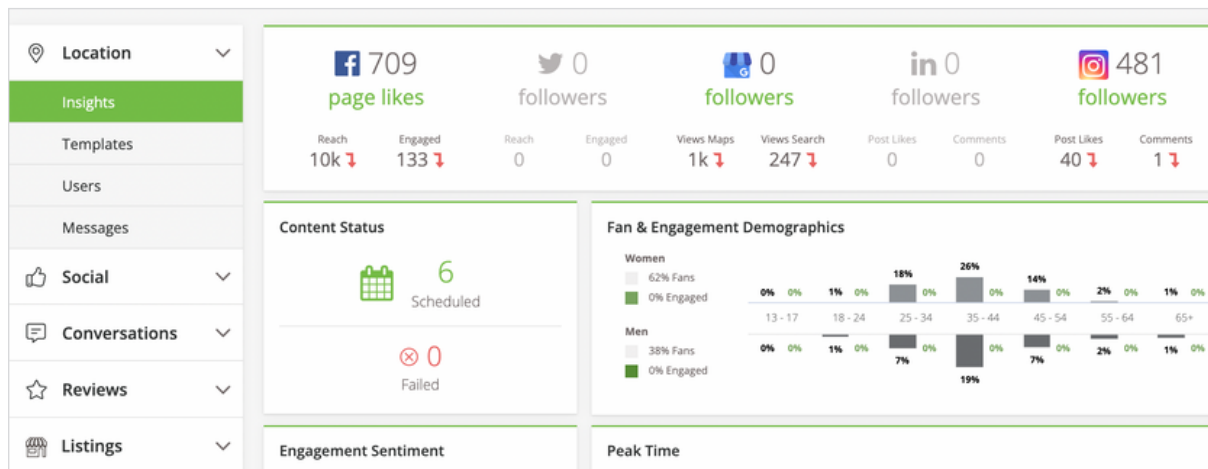


### View for single-location owners



## Insights dashboard

The insights dashboard pulls in metrics from the past 7 days. This is meant to provide you with a quick snapshot of your account with updates on Content, Engagements, Reviews, etc.



## User roles

All users will be Managers. This means you have access to the location(s) you manage, will be able to post and respond to engagements on connected social media sites, respond to reviews on connected review networks, update online listings data, view reports, metrics, and more.

## Adding users

As a manager of one or more locations, you will be able to add other teammates to the SOCi dashboard to help you manage your social media channels and online reputation. Any manager user will be able to add another manager user to any location they have access to.

### Single location owners can follow these steps:

- 01 Navigate to **Location > Users**
- 02 Click the **+ Add User** button
- 03 Enter first, last and email, click **Add**

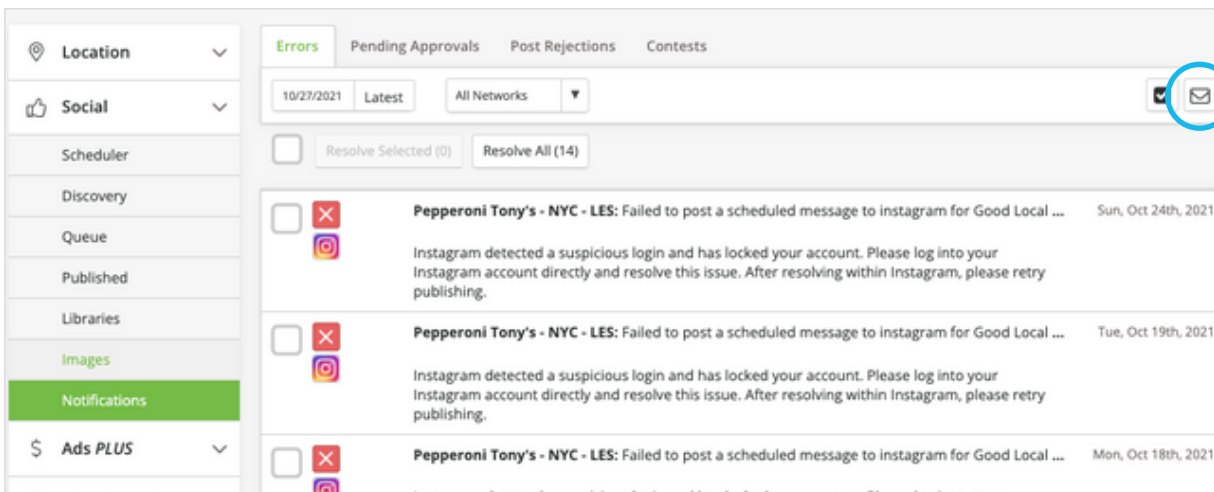
### Multi-location owners can follow these steps:

- 01 Navigate to **Account > Locations**
- 02 **Location > Users**
- 03 Click the **+ Add User** button
- 04 Enter first, last and email, click **Add**
- 05 Repeat for each location

## Setting up email notifications

Looking for a way to be alerted when new things come into the SOCi platform? You can set up email alerts and choose what items you want to receive notifications for.

- Once in your location, head to the Social section and then select the Notifications tab.
- In the top right-hand corner, click on the envelope icon



From there, click on the **"Create New Subscription"** option. This will prompt you to define exactly what type of email notifications you would like to receive for your account, location, or group.

**Create Email Subscription**

1. Select an account, location or group to subscribe to

2. Select notifications

**Errors & Warnings**  
 All types

**Engagements**  
 Facebook Private Message, Facebook Comment

**Content**  
 All types

**Ads**  
 All types

**Reviews**  
 All types

**Review Responses**  
 All types

**Location "Everything SOCIAL"**

Subscribed to: Facebook Private Message notifications, Facebook Comment notifications, Instagram Comment notifications, LinkedIn Comment notifications, Google My Business Question notifications, Google My Business Answer notifications

Notifications sent as they occur.  
No reminders configured.

## Scheduling content for the future and post now

This is where you can view, edit, and create immediate or future posts. The scheduler is a great place to view what content has already been scheduled out so you can determine what needs to be added.

### Post Now

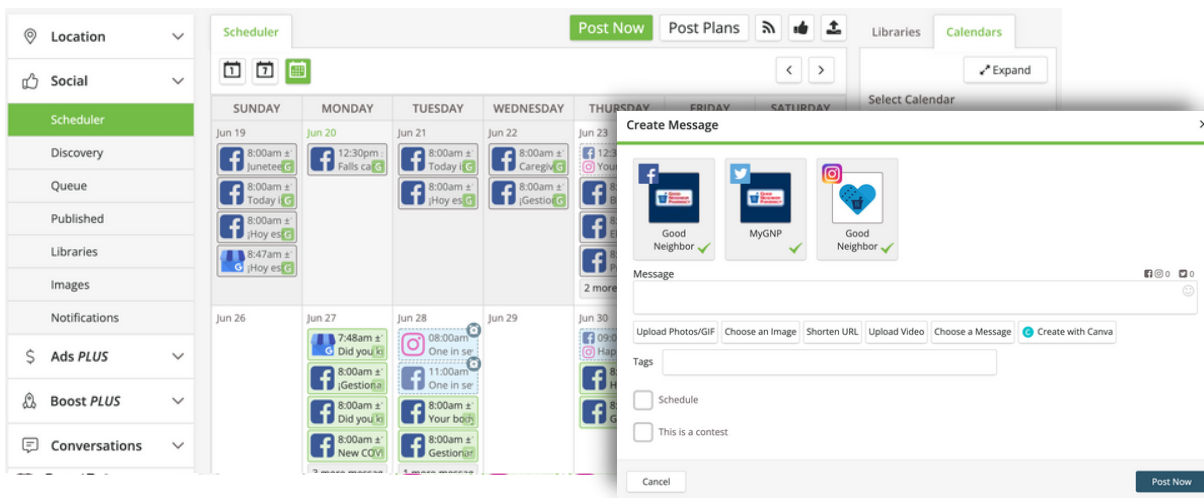
Select the Post Now button to post to the selected networks within minutes.

### Scheduling a Post

You can schedule a post minutes, hours, weeks, or even months ahead of time! The further in advance you schedule out the content, the more it'll help you organize your social posts.

## How to post

- Once you select your location, click on the Social tab, and then select the Scheduler.
- Click the "Post Now" button (top right) or choose a day on the calendar to schedule a post for.

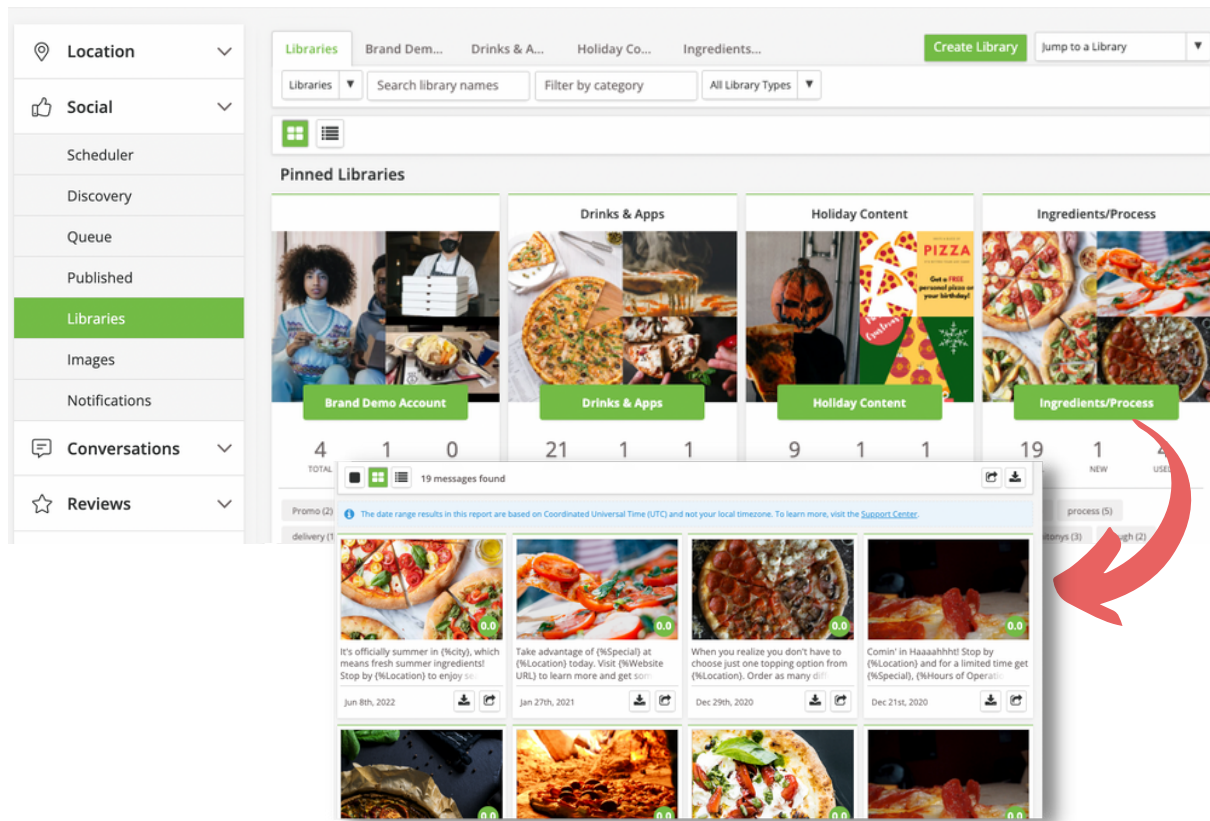


## Scheduler colors

- **Green:** This indicates your post is successfully scheduled for the future date/time.
- **Grey:** This indicates the post has already been published to the selected networks.
- **Red:** This indicates there is an error associated. You can click on this post directly to get more information or head to your Notifications tab for details.
- **Orange:** This indicates your post is scheduled but post approvals are turned on. Meaning, before it publishes to the selected networks, it needs to be approved usually by your management team.

## Social > Library tab

As you get up and running with the platform, we encourage you to access the Library section to see what content has been shared with you and add your own content! This is where you can build out your content for posts ahead of time. The more you build up your libraries, the easier it'll be to quickly schedule out posts! The libraries contain both the messaging as well as the visuals for your future posts.

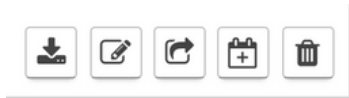


### Pro tip

Creating content outside of what has been shared with you provides your audience with the personal connection that they crave! By doing so you're further building a connection with both current and future customers as well as your surrounding community.

## Accessing content within a library

Once you find the library you're looking for, click on it to access the content. As you scroll through and identify a piece of content you'd like to use, you have a couple of options.



### Download

This allows you to download this content out of SOCi and save to your computer

### Edit

Warning, if you edit shared content, this would make a change for everyone. If you do not wish to make the change for everyone, you should select "move".

### Move

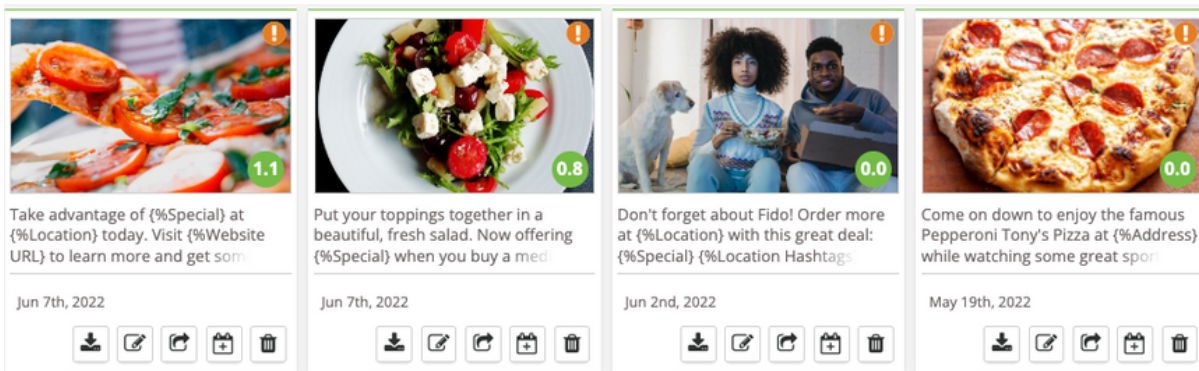
This allows you to make a copy of the shared content and ensure the original copy remains untouched. This allows you to edit and customize your own version of the content.

### Schedule

You can schedule content directly from the library should you like to take immediate action.

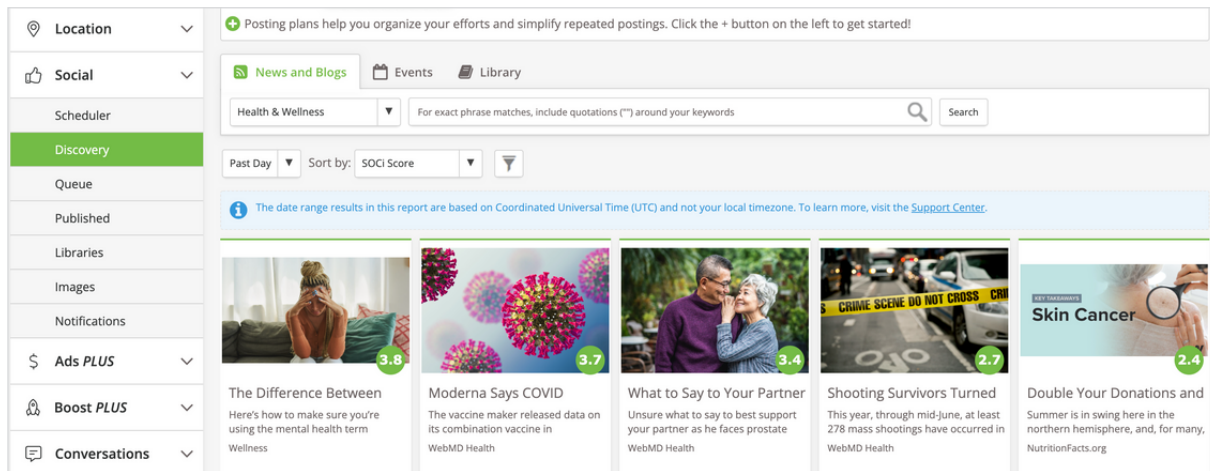
### Delete

Remember, if you delete in a shared library, you're deleting for everyone. But if this post is outdated or truly needs to be removed, you have the option to take action.



## Discover top performing content

From the content section, click on the Discovery tab. This will allow you to search by keywords or filter by category for additional topics to post about. From here, you're able to see top-performing content from news and blog sites.



## Responding to engagements

SOCi provides a centralized dashboard where you can respond to all engagements, rather than logging in natively to each network. These engagements pull in from Facebook, Instagram, Twitter, LinkedIn, and Google Q&A. To view all of your engagements, navigate to "Conversations" > "Engagements". To easily sort and find specific engagements, you can filter through engagements by sentiment, network, time frame, engagement type, and keywords. To respond, click the "Respond" button, enter your response in the text box displayed at the bottom of the pop-up or select from the available response templates, then click "Respond".

### New

This indicates a new engagement that hasn't been viewed yet.

### New with count

This indicates a conversation is occurring and this is a new response within the conversation.

### Opened

This indicates the engagement has been viewed but not responded to yet.

### Resolved

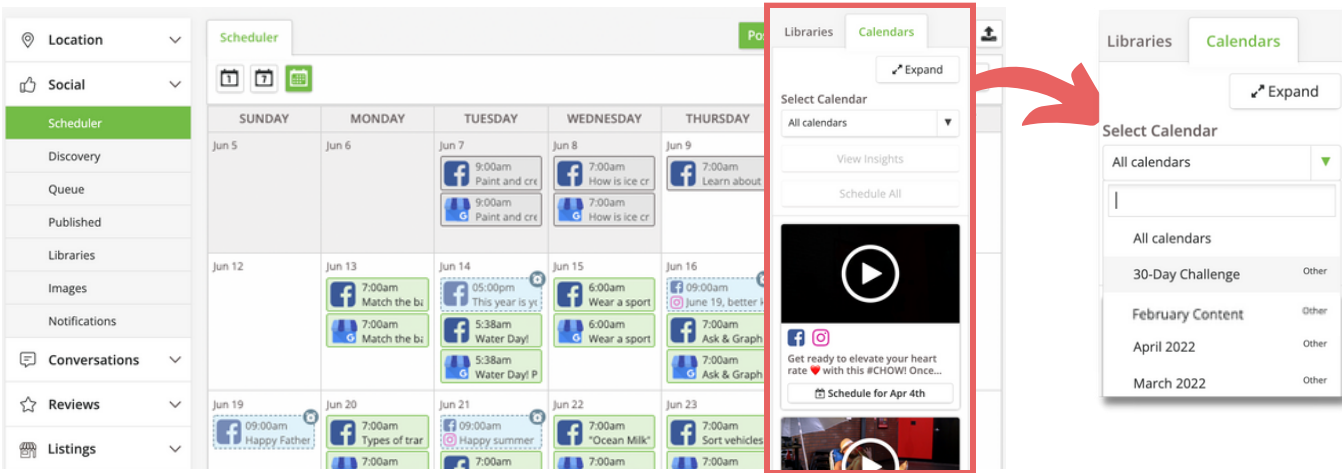
This engagement has been responded to and marked as resolved, as no further action is required.

### Archived

Archive your resolved engagements

## Community calendar

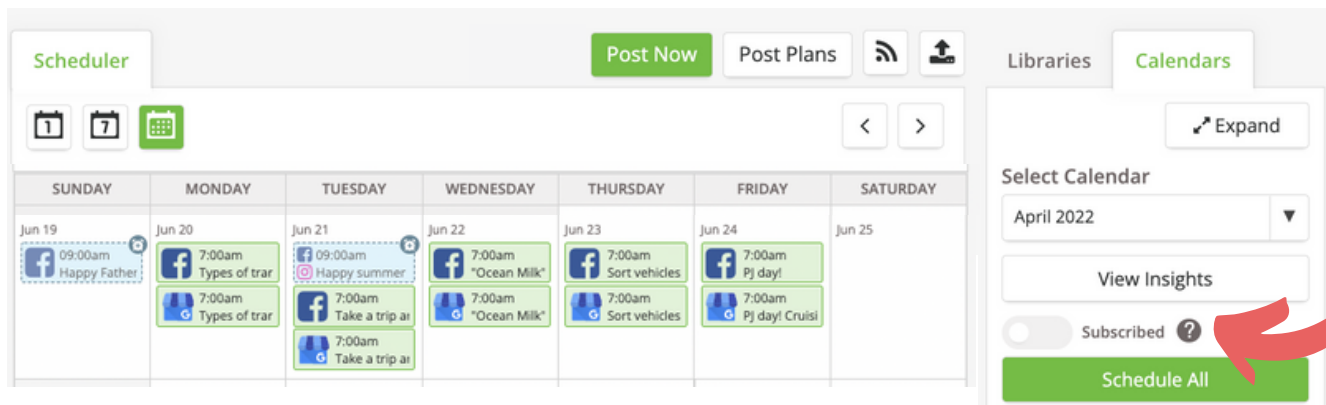
The SOCi Community Calendar allows your account administrators to create and share a pre-planned schedule of posts with you. You will then have the option to publish these posts on your social media pages with just a few simple clicks.



## Subscribe to community calendar

To ensure you don't miss any content, subscribe to ALL current and upcoming content on each calendar shared with you with just one click. To subscribe to Community Calendar content follow these steps:

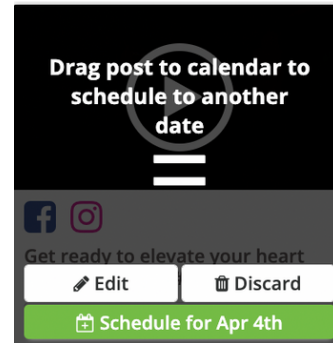
- 01 Navigate to your location
- 02 Click **Social > Scheduler**
- 03 On the Library sidebar to the right of your scheduler, click the **Suggested** tab
- 04 Using the drop down menu, select any of the available calendars
- 05 Toggle the **Subscribe** slider



## Edit or discard posts

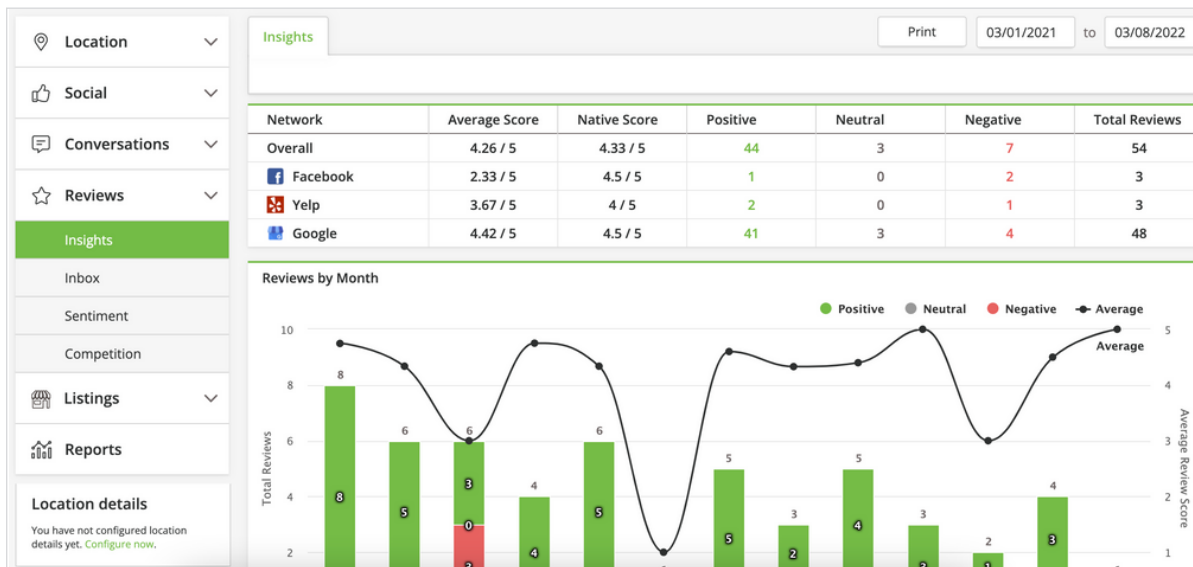
If you would like to edit a post you can either select into the post on the scheduler or select Edit from the Library sidebar.

If you do not want to use the Community Calendar content, hover over each post in the Library sidebar and click Discard or open the post on the calendar and select Discard. If you take no action, the content will expire and not be accessible once it has surpassed the expiration date.



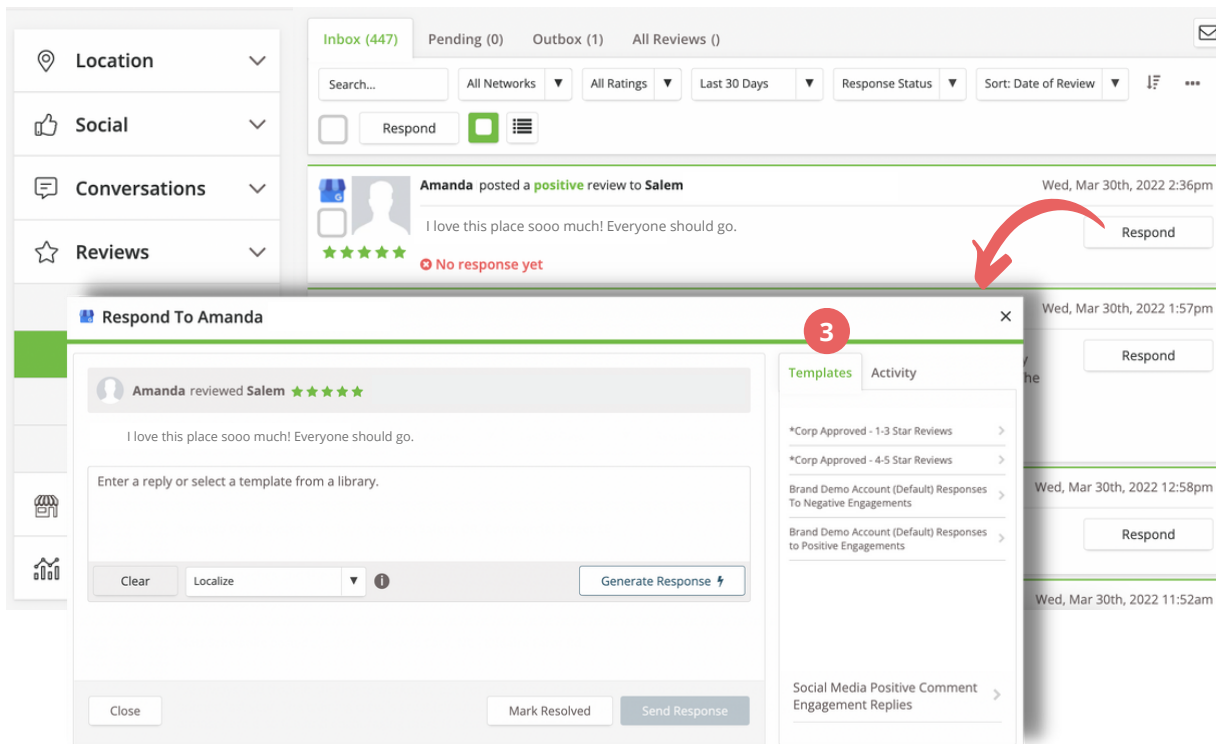
## Reputation from the insights dashboard

View a breakdown of your reputation networks, the sentiment of the reviews, as well as the review totals by navigating to the "Reviews" tab, then "Insights". You will have access to various graphs pulling in analytics on Reviews by Month, Source, and Sentiment. Additionally, you can track response times to ensure you and your team are responding promptly.



## Responding to reviews

To jump right into responding to reviews, head to the “Reviews” tab and then “Inbox” tab. This will direct you to your Inbox where you will find a list of all new reviews that require a response and a history of reviews under the “All Reviews” tab. To respond to a review, click on a review in the “Inbox, then you have a few options to respond, (1) enter your response, (2) select generate response (click multiple times for new options), (3) select from the available response templates, and/or (4) use the “Localize” dropdown.



**Best practice**  
It is best practice to respond to a review within the first 24–48 hours of it being posted.

