Marketing Cloud Social Studio Implementation Guide

Salesforce, Spring '20

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SOCIAL STUDIO IMPLEMENTATION GUIDE

Social Studio is a one-stop solution that allows you to manage, schedule, create, and monitor social media posts. You can organize the posts by brand, region, or multiple teams and individuals in a unified interface. Social Studio offers powerful publishing and engagement platform for content marketers, plus the comprehensive content performance by social network and time frame. A single interface offers a fully customizable team-based collaboration platform that analyzes channel and content performance. Analyze current trends and recommend new content ideas.

Social Studio Prerequisites

To get started, review the prerequisites for Marketing Cloud Social Studio.

Ensure that you have the following information before you use Social Studio.

- Account information for the social accounts that you want to use in Social Studio
- If enabling Single Sign-On for your Social Studio tenant, Identity Provider (IdP) information from your company's IT department
- The activation email from noreply@salesforce.com, which contains the login information for Social Studio

  If you don't receive an activation email. check your spam folder and ensure that the domain has been allowlisted.

- An active Social Studio account
- A Bitly account to shorten URLs
- An active Marketing Cloud account if you are using Social Studio from within the Marketing Cloud
- Social Studio is compatible with the browsers listed in Graded Browser support

Keep these points in mind when using Social Studio.

- Social Studio requires HTTPS. You can't use it on non-HTTPS domains.
- Clickjacking is enabled.
- Salesforce domains don't allow framing.
- Logins expire regardless of activity or can be set to a configurable period per the client. The default is never.
- As a Super User, you can configure the number of logins before lock out. The default is 100.
- Invalid user account logins automatically count across sessions.
- You can't use duplicate usernames.
- Admins can grant account login access for support. Support logins auto-expire after 24 hours.

SEE ALSO:

   External Video Link: Connecting a Social Studio Learning Account to Marketing Cloud

Supported Social Networks in Social Studio

Marketing Cloud Social Studio supports the most commonly used social networks, with some exceptions. For example, you can only post to Instagram personal accounts only from Social Studio mobile. But if you have an Instagram business account, you can post directly from Social Studio web.

You can publish content, engage with posts, and analyze posts from accounts on these social networks. Workspaces can accept these social network types, and Einstein can analyze the posts.

Network	Workspace	Publish	Engage	Analyze	Einstein
Facebook	✅ Social Studio and Social Studio Mobile support Facebook managed pages, but not personal profile pages. 4	✅	✅	✅	
Twitter	✅	✅	✅	✅	✅
LinkedIn Social Studio and Social Studio Mobile support LinkedIn Company pages but don't support LinkedIn groups or personal profile pages. 1	✅	✅	✅	✅	
Google+	✅	As of March 7, 2019, Google shutdown Google+ APIs. As a result, Social Studio removed all compose and engage functions for Google+ content. No action is necessary, but after March 7, 2019, you can't publish new Google+ content or reply to Google+ content older than March 7, 2019. Prior Google+ content still appears in Social Studio for historical purposes.		✅	
YouTube	✅	✅	✅	✅	
Google My Business	✅	✅	✅	✅	

Network	Workspace	Publish	Engage	Analyze	Einstein
Instagram	✅	✅ Create Instagram posts in Social Studio desktop. Publish the posts on Instagram using the Instagram mobile app. Those posts appear in the Publish calendar. 2	✅	✅	✅
Instagram Business	✅	✅	✅	✅	✅
Pinterest	✅	✅		✅	
Sina Weibo	✅	✅		✅ Broad listening for Sina Weibo accounts requires the Premium Chinese Data license. Contact your account representative for more information. 3	

SET UP SOCIAL STUDIO

Before you configure Social Studio, there are important pieces of information you must gather in able to make the most of your implementation. Consider who you want to have Social Studio access and what permissions they require, both at a tenant level and a workspace level. Also consider the social accounts to be monitored and keep in mind which ones to publish content on and to engage on. In a Social Studio implementation, consider what topics are monitored and where a listening methodology with associated keywords is needed. List the workspaces you need, their purpose, and their organization. Having a layout of workspace structure helps determine which users and social accounts you require. To categorize published content among your social accounts, consider what labels to use to organize the content.

Who This Guide Is For

This guide is for Marketing Cloud and Salesforce Product Architects, Marketing Consultants, and Solution Architects to implement Social Studio.

Implementation Prerequisites

To implement Social Studio, an active license to Salesforce's Social Studio platform is required. While this implementation document covers various features found within Social Studio, some features are not available depending on the license edition. For details as to what entitlements are available with your license, refer to your order form.

Required Products: Minimum of Social Studio Basic Edition license

Products Note Supported: Service Cloud, Sales Cloud

Social Studio Administration

Set up Administrators in Social Studio as Super Users or Admin Only users. These Super Users have the added responsibility of managing and maintaining the customer's Social Studio environment.

User Role Permissions in Social Studio

User roles in Social Studio have different permissions. All users, regardless of role, can access the admin screen in Social Studio. Access to the admin functions depends on their role permissions.

> **Note:** Topic profiles, social accounts, and approval rules that the user created after their permissions are changed to a lower level remains accessible. A permission level change could be super user to full user or full user to basic user.

These icons denote the level of permissions in the organization by User Role:

indicates that the permission is granted. indicates that the permission has conditions.

Permission	Admin Only	Super User	Full User	Basic User
Workspaces				

Permission	Admin Only	Super User	Full User	Basic User
• Add workspace		✓	✓	NA
• Manage workspace settings		✓	✓	✓
			You must be a Full User or Basic User and a workspace admin to manage workspace settings.	
• View workspace content including calendar and performance		✓	✓	✓
			Full User and Basic User can view the Workspace content, calendar, and performance only for workspaces they can access.	
Admin				
• Create new, edit existing, or delete (make inactive) engagement classification types	✓	✓		
• Configure Social Studio for Single Sign-On on page 11	✓	✓		
• Connect a Salesforce account	✓	✓	✓	
			Can view, create, and manage their own Salesforce accounts, but can't see or manage accounts created by others	
• Enable SSO for Users on page 11	✓	✓		
• Register social accounts in a tenant	✓	✓	✓	

Permission	Admin Only	Super User	Full User	Basic User
• Register Google My Business Accounts	✅	✅		
Instagram Hashtags				
• Create hashtags	✅	✅		
• Deactivate hashtags	✅	✅		
• Delete hashtags	✅	✅		
• Edit hashtags	✅	✅		
User Management				
• Add Users	✅	✅		
• Export user list	📝 Note: All user roles can view and export the user list. Exported lists contain usernames, display names, email addresses, time zones including location, and the number of Workspaces the users are in.			
• Modify user settings	✅	✅	Only own Settings	
Sentiment Model				
• Adjust Sentiment Model	✅	✅	✅	✅
			If granted permission from a Super User or Admin only user, the Sentiment Model can be shared to Full and Basic Users.	

Permission	Admin Only	Super User	Full User	Basic User
• Grant access to Sentiment Model to Basic Users	✅	✅		
• Use Sentiment Model	✅	✅	✅	✅
			A Super User must grant permission to a Full User or Basic User before they can use the Sentiment Model.	
Macros				
• Create or edit Macros	✅	✅	✅	
			Full Users can create and edit their own macros.	
Topic Profiles				
• Create and manage topic profiles	✅	✅	✅	
• View topic profiles	✅	✅	✅	✅
			Full Users can see topic profiles that they created and the topic profiles shared with them. To share the topic profile, an Admin-only or Super User adds the topic profile to a Social Studio workspace.	Basic Users can only view topic profiles shared to a Social Studio workspace. To share the topic profile, an Admin-only or Super User adds the topic profile to a Social Studio workspace.
Source Groups				
• Create and manage source groups	✅	✅	✅	
• View source groups	✅	✅	✅	✅

Permission	Admin Only	Super User	Full User	Basic User
			Can access the source groups they have created or that were shared with them. To share the topic profile and the source group it belongs to, an Admin-only or Super User adds the topic profile to a Social Studio workspace.	
Analyze Dashboards				
• Share		✅	✅	✅
		Only Super Users can share and update dashboards that they own.	If you are a workspace Admin and a Full User or a Basic User, you can share, update, or delete dashboards that you own.	
• Update		✅	✅	✅
		Only Super Users can share and update dashboards that they own.	If you are a workspace Admin and a Full User or a Basic User, you can share, update, or delete dashboards that you own.	
• Delete		✅	✅	✅
			If you are a workspace Admin and a Full User or a Basic User, you can share, update, or delete dashboards that you own.	
Analyze Workbenches				
• Share		✅	✅	✅
			If you are a workspace Admin and a Full User or a Basic User, you can share, update, or delete workbenches that you own.	
	ADMIN ONLY	**SUPER USER**	**FULL USER**	**BASIC USER**

SEE ALSO:

Access Admin Settings for Social Studio

Macros in Social Studio

Topic Profiles in Social Studio

User Roles

User Management in Social Studio

If you are a Super User, you can manage users in Marketing Cloud Social Studio. Tasks you can complete are add, disable, edit, force a password reset, grant permissions, and hide inactive users. Managing users can be done in the Admin portal.

Refer to this table for the user management tasks that different user roles can complete.

Tasks	Description	Admin only	Super User	Full User	Basic User
Search for a User	Enter at least 3 characters and results are auto filtered to matching results.	✅	✅	✅	✅
Add a user	Add a user to the tenant and specify the user details. [1]	✅	✅	n/a	n/a
Change My Settings	Edit user details for the logged in user.	n/a	✅	✅	✅
Change My Password	Change password of the logged in user.	n/a	✅	✅	✅
Disable a User	Deactivate a user account in the tenant. [2]	✅	✅	n/a	n/a
Edit user details	Edit user details for a user in the tenant.	✅	✅	n/a	n/a
Export User List as CSV	Exports the user list to a CSV report. Click ▾ > **Export as CSV**.	✅	✅	✅	✅
Force Password Reset	Forces a user to reset their password when they next login.	✅	✅	n/a	n/a

Tasks	Description	Admin only	Super User	Full User	Basic User
Hide Inactive Users	Hide inactive users in the user list. Click ▼ > **Hide Disabled Users**.	✅	✅	n/a	n/a

- The user must exist in the tenant before they can be added as a workspace member. (1)
- Users are not deleted due to the following (2):
  - Unscheduled posts
  - Owners of social accounts
  - Figured into post performance metrics.

SEE ALSO:

User Roles

User Role Permissions in Social Studio

Add a User to a Social Studio Tenant

You can add the users to your tenant—sometimes called Organization. Add new users in Social Studio before adding them as workspace members. Ensure that you have Super User permission rights to add a user. If not, contact a Super User to get the access permissions.

1. Access Admin settings.

2. Click **+ Add User** in the Users block or in the **Admin > User** menu.

3. Complete the fields.

   Make the username unique from other users, but you don't have to use the first and last name. A user's email address can have an apostrophe. Example: sean.o'connor@ex.com. Change the language if the user does not use English. The language change takes effect upon next login for that user.

   💡 **Tip:** To ensure that your posts publish immediately and with the correct time stamp, set your time zone before creating content.

4. Select **User Role**.

5. To give the Basic User or Full User to access to the Sentiment Model, select the checkbox.

6. Set the user to either **Active** or **Disabled**.

7. To add the user to a workspace or multiple workspaces, click **+ Add To Workspace**.

8. Click **Add** and then **Save**.

The email address specified by the Super User receives an automatically generated email with the subject `Account Activation for Social Studio`. The new user clicks the link to enter Social Studio to activate the account.

Improve Security and User Experience with Single Sign On for Social Studio

Improve your users' experience and your security with single sign-on (SSO) for Marketing Cloud Social Studio. After you, as an admin, enable SSO, your users can access Social Studio with one set of login credentials. Social Studio supports Security Assertion Markup Language (SAML) 2.0, an open standard that allows identity providers to pass authorization credentials to service providers. Only an admin or super user can enable SSO in Social Studio.

Before users can use SSO, you must configure it for your Social Studio tenant. Configure SSO one-time for each Social Studio org with your organization's Identity Provider (IdP) information and enable SSO for each Social Studio user.

The Identity Provider certificate required for Social Studio Single Sign-On must be a valid digital certificate in X.509 format. SSO in Social Studio supports self-signed and Certificate Authority (CA) certificates.

Configure Social Studio with Identity Provider Information

Part of the one-time SSO configuration for your Social Studio tenant is to provide your organization's Identity Provider (IdP) information. Your company's IT department must have the IdP configured beforehand and have the information available. Apply the IdP settings in Social Studio before enabling SSO for each user.

Your company's IT department configures Identity Provider. They provide the external IdP key, IdP certificate, and the Entity ID. Only Super Users or Admin users can enable SSO in Social Studio.

1. In Social Studio Admin, click **Single Sign-On**.

2. Add the SSO connection name for your organization. If you have multiple connections, a descriptive name sets the connections apart.

3. Add the Issuer, which is the EntityID / External Key of your Identity Provider. The EntityID or External key can be "https://www.mycompany.com" or "mycompany".

4. To upload your IdP, click **Upload File**. Your company's IT department can provide this information. The certificate must be in X.509 format signed by a trusted Certificate Authority. If you have an Intermediate CA certificate, upload the entire certificate chain.

5. Add the Service Provider Entity ID to your IdP, which is https://socialstudio.radian6.com. Because Social Studio is the service provider in this case, you must add https://socialstudio.radian6.com in the Entity ID field. Your Identity Provider uses the URL to identify the Service Provider.

6. Click **Apply Changes**.
   The Assertion Consumer Service (ACS) URL automatically pre-populates after you add the Single Sign-On settings in Social Studio Admin and clicked **Apply Changes**. After a successful authentication request is established, add the ACS URL to your Identity Provider's settings for redirect to Social Studio.

For the Identity Provider Initiated Request Binding, Social Studio Single Sign-On supports HTTP POST only. HTTP POST enables SAML protocol messages to be transmitted within an HTML form by using base64-encoded content.

Enable SSO for a Social Studio User

After you configure Social Studio for SSO, configure each user that requires SSO in the tenant so they can use SSO when logging into Social Studio. Only Super Users and Admin users can enable SSO for Social Studio tenant users.

1. In Social Studio Admin, click **Users**.

2. Find the user who needs SSO access and click ✏

3. To enable SSO for that user, select **SSO** to Active.

4. Enter the user's unique Federation ID. The unique Federation ID is usually an email address or numeric value from your IdP.

Social Studio updates the user's SSO status to enabled and the federation ID appears on the user admin screen in Social Studio.

Register a Salesforce Account in Social Studio

A social post author in Marketing Cloud Social Studio could have matching records in Contact Connector for Social Studio. Before you can see these records, register a Salesforce Account in Social Studio. After you link a Salesforce account to Social Studio, Contact Connector displays a post author's Salesforce contact record. If a record exists, you see it when viewing the post author's information. Customer Contact access depends on the Social Studio user's role. Admins, Superusers, and full users can link a Salesforce account to Social Studio and add the Salesforce account to a workspace.

> ⛔ Important: Social Studio only supports Salesforce Production Orgs. Currently, Salesforce Government Orgs and Sandbox Org IDs aren't supported.

1. In Social Studio Admin, click **Salesforce Accounts**.

2. Click **+ Add New**.

3. To see the account in the list, follow the remaining steps for account setup.

4. Click the account you registered. An inspector appears showing additional information about the account.

5. To add workspaces, click **Edit Workspaces**.

6. Select the workspaces you want and click **Save**.

Only one Salesforce account can be linked to a workspace.

After connecting your Salesforce account with Social Studio and adding it to a workspace, workspace users have access to view information about Salesforce records. Members can only see records related to Social Authors who have a Social Persona record within Salesforce. Examples of the type of data viewable are basic contact information about the contact or social author, such as name, title, industry, company, and more. Other examples include related cases, accounts, leads, opportunities, and other social personas.

Manage Sentiment Model in Social Studio

When managing the sentiment model in Social Studio, you can start to customize and train the Sentiment Model used in Marketing Cloud Social Studio. The Sentiment Model adjusts incoming posts that use a specific language. The language could be used a different context.

> 📝 Note: Posts listed in the sentiment model are in order of the date Social Studio receives the posts, not by the post's published date. The newest post ID is shown first.

1. To show the current model with the percentage of starred posts in agreement, click **Manage Model** . A bar graph also provides instrumentation for precision and recall across positive, neutral, and negative classifications.

- Sentiment Precision shows how accurately the Sentiment Model determines sentiment. For example, if the sentiment model returns 100 posts but only 15 are a match, the precision is 85%.

- Sentiment Recall shows how accurately the Sentiment Model scores neutral posts. For example, if there are 100 posts and 60 posts are either positive or negative in sentiment, the machine learning algorithm classifies 50 of them as positive or negative. The algorithm misses 10 posts and incorrectly labeling them as neutral. The recall is 50/60 or 83%.

Precision and Recall scores are calculated and shown for the positive, neutral, and negative sentiments.
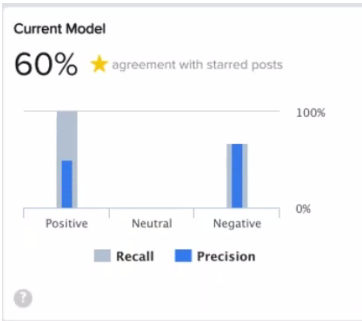
2. Enter a keyword to add.

3. Define a point value (0.5, 0.2, 0, -0.2, -0.5) for each added keyword from the dropdown.

4. Click **Add.**

   Newly added keywords appear in gray above any existing keywords.

5. To preview and test these changes in another graph called Proposed Model, click **Preview Changes** then **Test** .

   The Proposed Model goes out and samples 500 random posts from existing data. The proposed model applies the changes and presents in a graph. The proposed changes compare the changes of the existing sentiment model to the proposed changes.

   • Safe to change

   • Caution to not change

   • There is not enough of an improvement

6. If the changes do not yield the expected results, click **Cancel** and change the keywords or phrases and point value.

7. Click **Preview Changes** again to view the new changes.

8. Click **Commit Changes**.

   ⚠ Warning: Click **Commit changes** and the changes permanently affect the Sentiment Model from the time of the change forward. You cannot undo these changes.

   💡 Tip: Try to get your sentiment agreement to around 79%.

Social Accounts in Social Studio

All users, except basic users, can add social accounts to the Marketing Cloud Social Studio organization. Admin-only users, super users, and full users can then add these accounts to one or more workspaces. Register the social accounts first in your Social Studio tenant before you can reauthorize, remove, or transfer ownership of them. You can also delete a Facebook account that has no connected pages.

Add a Social Account to a Social Studio Tenant

To add a new social account to a Marketing Cloud Social Studio tenant, connect the social account to a Social Studio tenant. Ensure that the social account is part of the tenant before you add the account to one or more workspaces. The number of social accounts that you can add is based on your Social Studio edition. To add more social accounts to a tenant, contact your account representative for details.

> ✏️ **Note:** For Instagram business accounts, a personal account and business account of the same name count as one entitlement. The Instagram business account attaches Business to the account name.

1. To add a social account, navigate to Admin in Social Studio and select **Manage Social Accounts**.

2. To register a new account or connect the social account to a Social Studio tenant, choose the network and follow the individual steps. The steps vary by the type of social account.

SEE ALSO:

Add a Google My Business Account to Social Studio

If you are a super user or an admin-only user, add a Google My Business account in Social Studio. Before adding the account, purchase the Social Review Management - Integration with Google My Business add-on. Contact your account representative in purchasing the number of entitlements you need for location pages.

With a Google My Business account, you can register up to 8,000 locations. One location page is considered one review account and is counted against your tenant entitlements. You can also add the account to multiple workspaces using the Admin portal. Remember, a Social Studio tenant can have a maximum of 8,000 accounts which are a combination of social account and review accounts. Create your Google My Business and your location pages outside of Social Studio before registering the account to the current Social Studio tenant.

1. In Social Studio Admin, select **Manage** under Social Accounts.

2. Click **Manage Social Accounts** and then click **Google My Business**.

3. To accept Google's Terms of Service, click **Confirm**.

4. Select **Yes** at Google's prompt allowing Social Studio to access data from this account. The authentication is a one-time prompt per Social Studio tenant.

5. Associate up to 500 location pages per workspace and to the Google My Business account. You can search for a specific location page or use the dropdown menu to see all, connected, or not connected pages. An engage column shows a maximum of 50 social accounts, with a Google My Business location page considered one account.

   You see an error message if you reach your entitled pages maximum. To purchase more locations, contact your account representative.

   To add location pages:

   a. Use the dropdown menu and select All, Connected, or Not Connected pages.

   b. Use another dropdown and select Countries, States, or Cities. The location pages matching those search parameters appear in the list.

   c. To add all the pages shown, click **All** or click the checkbox by the page for individual pages.

6. Click **Save**.

After you register the account, add the account to one or more workspaces.

Register an Ad Account in Social Studio

To promote an already published Facebook post in the publish calendar, register an ad account in Social Studio. Super Users and Full Users can register Facebook Ad Accounts.

1. In Admin, navigate to **Advertising Accounts**.

2. Click **+ Manage Advertising Accounts**.

3. Under Add or Remove Advertising Accounts, click **Add Account**.

4. Under the Facebook browser window, to allow Salesforce Marketing Cloud to access your Facebook ads and related stats, click **OK**.

5. In Social Studio, select from the available Facebook accounts and click **Save**. The accounts appear in the list of available advertising accounts.

Workspaces in Social Studio

Workspaces are a core component in Social Studio and enable customers to establish their own groups or "working spaces." Use workspaces to organize content by social accounts, discrete business units, geographical markets, external agencies, or social campaigns. The workspace admin can also add other Social Studio users.

You can use workspaces in Social Studio among the following ways:

- Discrete business units
- Geographical markets
- External agencies
- Social campaigns

Workspaces allow for a logical and central place to plan, publish, and engage content. A workspace is also an area for users to collaborate with a set of shared resources, social accounts, and calendars.

If you work in many workspaces, your five most recent workspaces are shown in the workspace selector under the heading Recent Workspaces.

📝 Note: If cookies are cleared on the computer accessing Social Studio, the list of recent workspaces no longer appears.

A workspace administrator can have a Super User role. They can use workspaces so other workspace members can work with social posts specific to that business tenant.

📝 Note: You must have Admin permission rights to perform this function. See the user role permissions table to verify the permission level. If you are not an Admin, contact the Super User for the organization to get the access permissions.

💡 **Tip:** Add workspace members who can collaborate, interact with social accounts where they can post, schedule, and approve content. The members can also monitor and engage with posts.

Create a Workspace

If you have the correct user role permissions, you can create a workspace in Social Studio. You need Super User or Full User permissions to perform this function. If you do not have the correct permissions, contact a Super User in the organization. Basic Users see a message that they don't have permission to create a workspace.

1. Click **+Create New** and enter the workspace's name. You can also add a description and upload an image for the workspace's avatar.

   📝 **Note:** If the image is under 5 MB in file size, you can use any picture or graphic of any format or size. The image is automatically downsized to 260 pixels x 260 pixels and used throughout Social Studio to identify the workspace.

2. Select registered social accounts to the workspace so workspace members can use them to post content.

3. Add one or more topic profiles to the workspace. A topic profile is a social media search, created in Social Studio, and comprised of keywords and filters. Topic profiles collect social media posts into Social Studio Engage columns or Analyze Dashboards or Workbenches.

4. Add users already in Social Studio to the workspace so they can:

   - View the workspace's calendar
   - Create, view, and publish content
   - View and engage with incoming posts in Engage columns
   - View content performance in Analyze Dashboards
   - Analyze content performance data in Analyze Workbenches

5. Click **Finish**.

6. Review the settings for the workspace.

Manage Social Accounts in a Social Studio Workspace

You can manage social accounts within a Social Studio workspace. If you are a super user or workspace admin, you can add social accounts to one or more workspaces. You can also connect a new social account, reauthorize a social account, or remove a social account from a workspace. You can also search from a list of social accounts, or transfer the owner of the social account to another Social Studio user.

The number of social accounts allowed for a tenant is based primarily on the Social Studio edition purchased. Contact your account representative if you have further questions.

To access workspace settings, click [gear icon] and complete these social accounts management tasks:

- Access list of social accounts
- Add a social account to a single workspace
- Add social accounts to multiple workspaces
- Connect a new social account of these types:

  💡 **Tip:** The user who registers the social account in Social Studio is assigned as the owner. Use the Facebook account with admin rights to the necessary pages using Facebook's business manager functionality. Use an account with admin rights. You can easily move your social accounts when people leave the job or team and other administrators are introduced.

- Reauthorize a social account
- Remove a social account from a workspace
- Search in a list of social accounts
- Transfer the social account ownership to another Social Studio user.

Manage Users in a Social Studio Workspace

In Marketing Cloud Social Studio, you can add, delete, or change a user's permissions. Workspace users can contribute content to social accounts and be in one or more workspaces.

> **Note:** You must have workspace admin permissions to perform this function. If you are not an admin, contact the admin for the workspace to get the access permissions.

To access the members of a workspace in workspace settings:

1. Open workspace settings for the workspace.

   - Click **Users** in the menu on the left.
   - Click **Manage Users** under User Accounts.

A list of users for that workspace appears in a table format. The table shows this information:

- User's name
- User's picture
- User's email address
- User's role in the workspace
- If the logged in user is a Super User, user's role in parentheses
- Summary of what the user can or can't do in the workspace.

   > **Note:** If the logged in user is a full user or basic user, they don't see a Workspace member's user role.

SEE ALSO:

Add a User to a Social Studio Workspace

Change Workspace User Permissions in Social Studio

Remove a Workspace Member

Manage Workspace Settings in Social Studio

If you're a super user or workspace admin in Marketing Cloud Social Studio, you can change the settings for a workspace. If you aren't an admin, contact the workspace's admin to get access permission. When adding a workspace or changing a workspace's settings, you can perform tasks based on your permission level.

To access the workspace settings, click ⚙ in the workspace tile, or select the workspace and then click ⚙ .

Use the following tasks in managing your workspace settings.

- Change basic information of the workspace including its name, description, and image.
- Post Approval Rules
- Custom Bitly URL shortening for posts
- Engage Tab Templates
- Apply Engage Macros to multiple posts at the same time
- Remove a workspace from the tenant. Workspace members or pending posts to social accounts within the workspace fail if the workspace is deleted
- Share user created dashboards among workspace members

- If you are a Super User or the workspace owner, you can transfer the ownership to another user

SEE ALSO:

Associate an Ad Account with Social Studio Workspaces

To promote an already published Facebook post in the publish calendar, you associate a registered ad account to a workspace in Social Studio.

1. In Admin, navigate to Advertising Accounts.

2. Click **+ Manage Advertising Accounts** and then click **Ad Account**.

3. Step through authorizing Social Studio to access the account.

4. Select the new account, and the tile appears under Advertising Accounts, then click **Save**.

5. Select the new account from the list of ad accounts.

6. In the Advertising Account Info inspector, click the **Workspaces** tab.

7. To add a workspace or multiple workspaces, click **Edit Workspaces**.

8. Select one or more workspaces and click **Apply**. The Facebook accounts associated with the workspace can now use the Ad Account.

Approvals

Social Studio approvals provide a workflow to check and approve or reject before publishing. Using approvals helps eliminate content getting published without the necessary individuals seeing it first.

Post Approval or Rejection Flow

Approvals or rejections work in Social Studio basically as follows:

1. An approval rule is created and set to execute when a custom condition or set of conditions are met.

2. A post is created and the author submits it for publishing.

3. That post, matching the conditions of an Approval Rule, triggers the execution of an Approval Rule.

4. The approval rule has a condition where another user is an approver and they must approve the post before it can be published.

5. The approver receives an email that there is a post needing their approval and a pending approval notification appears in their tasks in Social Studio.

6. The approver reviews the post and either approves or rejects the post, with the option of adding a comment on rejection.

7. The author receives an email that their post has been rejected and that notification also appears in their tasks in Social Studio.

    a. If the post is approved, the post is published.

    b. If the approver has rejected the post, the author can either revise the post and resubmit the post again for approval or cancel the post.

> 📝 **Note:** This example is a simple approval flow and your process can be more complex. Approval Rules allow for as much or as little complexity as needed.

Create Approval Rules in Social Studio

If you are a workspace admin or super user of Marketing Cloud Social Studio, create new publish approval rules. Configure the approval rules to meet the workflow requirements for content publishing for your organization. You can also configure as many approval levels as necessary.

No Approval Rules

If the Workspace contains no approval rules, a message appears prompting you learn more.
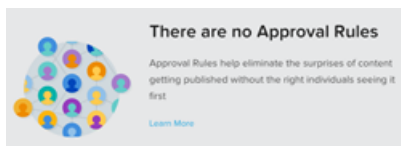
Create a New Publish Rule

1. Navigate to **Publish Rules** in Workspace Settings.

2. Click **New**.

3. Enter a name for the rule.

   > 💡 **Tip:** Be descriptive with the name and include an abbreviated summary of what the rule does. If you have created many approval rules, you can see the rule's purpose in the name.

4. To trigger the rule, specify the criteria.

   a. For the first condition, select from the Select Condition Type menu in the block labeled 1.

   b. To add another condition that triggers the rule and specify the parameters, click **Add Condition**

      > 📝 **Note:** Approval Rules must contain at least one condition.

   c. Continue adding conditions until all approval rule requirements are met.

5. To display advanced logic that can be applied to the conditions, click **Advanced Logic**.

   You can use advanced logic to customize how criteria are executed. For example, use `1 or (2 and 3)` meaning that condition 2 and condition 3 must be met together or just condition 1 to trigger the approval rule. If condition 1 is met, then conditions 2 and 3 are not considered.

6. To display a box where you enter the advanced logic parameters, click **edit**.

7. To make it the default, click **Set to Default** .

8. Specify the approvers for the rule.

   a. In the first approver block, click the **Please Select An Approver** dropdown.

   b. Scroll through the list and select the appropriate approver.

    c. If the rule requires another approver, click **Add Approver**

    d. Add the approver by following the same steps.

    e. Continue adding approvers under the conditions you require for approval are met.

9. To display advanced logic that can be applied to the approvers, click **Advanced Logic**.

Use advanced logic to customize who provides approvals. For example, *1 AND 2* meaning that Approver 1 AND Approver 2 required for approval.

10. To display a box where you can enter the advanced logic parameters, click **edit**.

11. To make it the default, click **Set to Default** .

12. Click **Save** . The approval rule appears in the list of approval rules for the workspace. If there are multiple approval rules, it appears at the bottom.

Create a Promotion Approval Rule in Social Studio

You can add a promotion approval rule for promoted Facebook posts. Create different rules for certain criteria conditions and approvers.

1. In Social Studio Admin, select **Approval Rules** and then **Promotion Rules** in workspace settings.

2. Click **New** and add a name for the new rule.

> 💡 Tip: Be descriptive with the name and include an abbreviated summary of what the rule does. If you have created many approval rules, you can see the rule's purpose in the name.

3. To trigger the rule, specify the criteria.

    a. In the first condition, which is required, select whether a rule checks for a submitter, ad account, social account, or label.

    b. Choose whether the condition matches or doesn't match and enter the specific entry.

    c. Repeat to add another condition.

4. Define the Social Studio users who approve posts for this rule.

5. Define the approvers in this rule in the first approver field and entering the name. If more are required, enter the start of their name and select the match.

6. You can also use advanced logic to further customize the rule's behavior.

7. Click **Save**.

MONITOR SOCIAL STUDIO SOCIAL LISTENING

To take advantage of Social Studio's social listening functions, follow these topics .

Engage in Social Studio

Use the Engage part of Marketing Cloud Social Studio to monitor the content that has been posted to social accounts or gathered from topic profiles. The posts that appear can be from content published using Publish or from defined topic profiles.

Using Engage, you can see what others are replying to, commenting on, and sharing with other social network members. Posts in Engage can be responded to, marked for other engagement actions, and assigned to others on the team to follow up.

Engage uses tabs, which can contain one or more columns. A column can have one or more social accounts or one or more topic profiles. The social accounts and topic profiles can exist in multiple columns or can be contained within the same tab. Specific filtering criteria for multiple social accounts can have their own columns within their own tabs. The tabs can have the same accounts but with different filtering options.

You can have a limited number of 30 tabs. Click and drag the tab title to rearrange tabs into a new order.

A tab can contain an unlimited number of columns where more columns can be added, renamed, removed, rearranged, and filtered.

Social Studio remembers where you were in Engage the last time you worked, so when reopening that workspace, you are taken to Engage instead of Publish.

Engage uses Real-Time Collaboration so you can see who else is viewing and engaging with the same posts avoiding duplication of post engagement.

> **Note:** The same image or video formats apply if:
> - Adding an image or video when composing a post in Publish
> - Viewing a post in an Engage column
> - Viewing a post with an image or video in a Feed card of an Analyze Dashboard

For suggestions and comments, click the Feedback for the Social Studio app. The link is not a request for Technical Support for Social Studio. For help on using Social Studio, refer to Help Resources. Use the page assist icon to find relevant help pages. Use the avatar picture to view your user profile. Use the bell icon to review notifications.

SEE ALSO:
    Real-Time Post Collaboration in Social Studio Engage
    Review Image, Video, and Facebook Feed Options for Social Studio Posts
    See the Social Studio Posts You Want with Column Filters
    Supported Social Networks in Social Studio
    Topic Profiles in Social Studio

Add or Remove an Engage Column in Social Studio

If the post information you want does not appear by default, you can add a column in Marketing Cloud Social Studio Engage. Columns enable you to view social account and topic profile activity side by side. You can add as many columns as you want, and a column can contain more than one social account or topic profile. Columns can have social accounts or topic profiles, but not both. Plus Columns don't support Google+ or Pinterest accounts.

As of March 7, 2019, Google shutdown Google+ APIs. As a result, Social Studio removed all compose and engage functions for Google+ content. No action is necessary, but after March 7, 2019, you can't publish new Google+ content or reply to Google+ content older than March 7, 2019. Prior Google+ content still appears in Social Studio for historical purposes.

The workspace lists only the topic profiles added by the workspace admin. To use a topic profile in a column, ensure that the workspace admin adds the topic profile to the workspace first. If you don't see the topic profile that you want to add, contact your workspace administrator.

1. In Engage, scroll to the right, and click **Add Column**.

   📝 Note: If you have multiple columns, Add Column appears to the right of all your columns. If you have no columns, Add Column is the only button on the default tab.

2. To add social accounts, Google My Business location groups or topic profiles, choose **Social Account**, **Topic Profile**. Social accounts, topic profiles, and location groups can't exist in the same column.

   • Select one or more from the list and click **Apply**.

   The new column appears with the selected social accounts or topic profiles.

3. To remove a column, click ⚙ , and click **Remove Column**. Removing the column doesn't delete any interactions made in the posts. They are already part of the individual posts.

Filter an Engage Column in Social Studio

You can filter the posts in an Engage column to view specific types of posts.

1. In Engage, click ⚙ for the Engage column you want to filter.

2. Click **Filter**.

3. Apply one or more filtering options.

   📝 Note:

   • You can't filter by Quote Tweets in Twitter accounts or topic profiles.

   • To filter a Facebook column by comments, select **Comments Mentions**. To filter the column just by Facebook @mentions, select **Mentions**.

4. Click **Apply**.

SEE ALSO:

   See the Social Studio Posts You Want with Column Filters

Track Social Post Engagement and Metrics with Social Studio Analyze

With Analyze in Marketing Cloud Social Studio, you can monitor the discussions of owned social accounts and broader conversations. Understand what is being said, the overall tone of social discussions, and how topics and trends are performing. Dashboards summarize the engagement of posts in social accounts and information gathered from topics profiles. Use workbenches to get a deeper, more customizable view of social account and topic profile data.

With topic profile workbenches, you can use Einstein Vision for artificial intelligence image analysis. Einstein Vision uses pre-built image classifiers. Before creating a social listening summary dashboard or workbench dataset, assign the topic profile to a workspace.

Any user, regardless of user role, can access Analyze functionality. If you are not a super user, you can view dashboards and workbenches that are shared. If you create your own dashboards or workbench datasets, you can share them in the workspace.

Digital assets uploaded within a Social Studio tenant are available to any authenticated user within that tenant, based on workspace sharing or intentional link sharing. Social Studio's intended functionality allows users across workspaces within a tenant to share assets, however, those assets are not accessible between tenants. The image's URL can be copied and shared with other users outside the current Social Studio workspace. If trying to access the URL while in a different Social Studio tenant, the link is not valid.

URLs for Dashboards and Workbenches can be copied and shared with other users who aren't part of the workspace. These users can be users in the Social Studio tenant.

SEE ALSO:

Analyze Workbench Datasets

Track Posts with a Topic Profile in Social Studio

CSV Report Headers in a Social Studio Analyze Report

Einstein Vision in Social Studio Analyze

Topic Profiles in Social Studio

Analyze Dashboards in Social Studio

To monitor your brands, social accounts, competitors, and other social data, use Analyze dashboards in Marketing Cloud Social Studio. Dashboards show a summary of key factors over time for social account and topic profile activity. Review the performance of posts, topics, sentiment trends, and emerging keywords.

Choose the dashboard timeframe. The dashboard can cover the past day, or the past 7, 14, 30, 60, or 90 days. You can customize the date range up to 93 days. Print the dashboards as a PDF or share via email.

📝 Note: Each workspace member creates their own dashboards and only they can see the dashboard initially. The dashboard owner can share the dashboard with other members of the workspace. Make the social accounts and topics profiles a part of the workspace before creating the dashboard.

The gallery shows a list of dashboards created in that workspace with the type of dashboard and the accounts summarized in the dashboard.
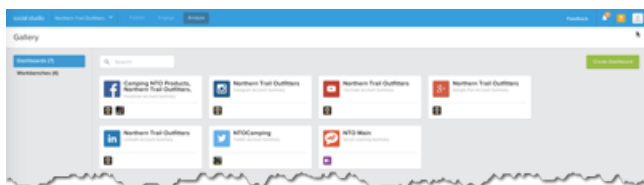
> 📝 **Note:** A dashboard using the Blank Dashboard Template can have a maximum of 30 cards.

SEE ALSO:
   Add or Edit Dashboard Sources
   Create a Dashboard in Social Studio
   Track Posts with a Topic Profile in Social Studio
   Edit a Topic Profile in Social Studio
   User Role Permissions in Social Studio
   User Roles

Create a Dashboard in Social Studio

Create a dashboard in Marketing Cloud Social Studio for a summary of social account, topic profile, or engagement summary data. Dashboards created by one workspace member are not visible to other members of the same workspace unless the owner shares the dashboard. Each workspace member creates their own dashboards.

1. Click **Create Dashboard**.

2. Determine the type of Dashboard:

   a. To get a summary of one or more social accounts, use **Social Account Summary**:

   - Select one or more Facebook, Twitter, LinkedIn, Google+, Instagram, YouTube, or Pinterest accounts. Sina Weibo accounts are not supported.
   - If you add more than one social account to the dashboard and all the social accounts are not displayed, use **Search**. To narrow the results, enter a partial name then select the result.
   - Use up to a 50 owned accounts per dashboard. Social Studio can only request 30 days historical data from the social network. LinkedIn shows up to 20 days or the last 50 posts.

   b. To get a dashboard on a topic profile, use **Social Listening Summary**:

   - Either select **Create New Topic Profile** or select a topic profile.
   - If more than one topic profile is available and all of them are not displayed, use **Search**. To narrow the results, enter a partial name and select the result.
   - Only one topic profile can be used per dashboard. Create a separate dashboard using each topic profile to use more than one.

   c. To see the engagement summary from Facebook or Twitter accounts, use **Engagement Summary**:

   - Select the accounts where the cards pull the engagement data.

   d. To start from scratch and create a blank dashboard, use **Blank Dashboard Template**:

   - A blank dashboard can include a topic profile or a mix of social accounts, but not both.
   - To choose where the cards pull their data, select the account type.
   -
     If the account type is Social Listening and there are no accounts selected, click ✏️ to either select a topic profile or create a topic profile.

3. Drag up to 30 cards over to the blank canvas.

Analyze Workbenches

Use Marketing Cloud Social Studio Analyze Workbenches to understand the conversations around your brand. With workbenches, you can address spikes in conversations and view the conversations over time. Use the same workflow as in Social Studio Engage. Workbenches can hold custom created and arranged datasets or info cards. The datasets can be based on topic profiles and social accounts such as Twitter, Facebook, LinkedIn, YouTube, Instagram, and Google+.

You can analyze your data by combining multiple segmentation types:

- author labels
- countries
- keyword group
- language
- media type
- post labels
- share of voice
- sentiment

You can set the time range of data gathered during 1, 7, or 30 days or use a custom range of 3–93 days.

A dataset can only use data from one topic profile or up to 50 social accounts of the same type at a time. Each dataset can contain one or more topic profiles or social accounts and appears as a separate item in the workbench. A dataset can't have a mixture of topic profiles and social accounts. Create another dataset on the same topic profile or the same social accounts with different cards for a different investigation or see the same data differently. The data can be compared side by side to see trends, themes, and emerging relationships.

Different social account datasets, such as Facebook accounts and Twitter accounts cannot be combined in the same dataset.

When you enter a workbench dataset, you can:

- See the name of the workbench.
- See at a glance if a dataset is for social accounts or topic profiles. A workbench can contain multiple topic profiles and social account datasets useful for comparing and contrasting different sets of the same data.
- To add a dataset, use **+ Add New Dataset**
- Manage workbench settings
- View the Core dataset card

The Workbench gallery contains the workbenches that are created in a workspace in Analyze. When you create a workbench, only you can see the workbench, no other Social Studio user can see your workbenches.

From the workbench gallery you can perform these actions:

- See the number of dashboards and workbenches in a workspace.
- Use **Search** to find a workbench if you have more workbenches than can be displayed at one time.
- To create a workbench, use **Create Workbench**.
- See if a workbench has one or more datasets.

Create a Workbench in Social Studio Analyze

Before you can create a dataset, create the Marketing Cloud Social Studio Analyze workbench first to hold the dataset.

1. Access Social Studio Analyze.
2. Click **Workbenches**.

3. Click **Create Workbench**.

A blank workbench appears. To change the title from New Workbench, click the title.

4. Add your datasets.

SEE ALSO:

Add Initial Dataset Card

Topic Profiles in Social Studio

Topic profiles are a social media search tool, created in Marketing Cloud Social Studio. Once a topic profile is created or imported to Social Studio, see the matching social media posts in Engage columns. Conduct workflow management and engagement from your own social media accounts. To customize the results for the topic profiles, specify keywords and filters important to you.

📝 **Note:** To import topic profiles to the workspaces, you need Workspace Admin permissions. If you are not an Admin, contact the Workspace admin for the organization to get the access permissions.

If you are a Super User, you can manage all topic profiles in the organization. Other users can see and manage only the topic profiles shared to them in specific workspaces.

You can import existing topic profiles into workspaces by using the workspace settings. If the topic profile is created in Social Studio, the default is private and only a Basic User sees the topic profile. The basic user must be a member of the same workspace where the topic profile is being used. Changes to a topic profile can be done within the Radian6 Analysis Dashboard by the owner of the topic profile or within Social Studio.

You can also create topic profiles within the Admin settings or the Analyze module.

Keywords added to a topic profile are highlighted in the posts in the Engage topic profile column. More of the post can be shown in the column, either 310 characters or 10%, whichever is greater.

📝 **Note:** Topic profiles in Social Studio can only have up to 1000 total keywords including "contains" or "AND Contains" keywords. Entering a combined keyword in the "contains" area, for example, "apple and pear," counts as two keywords, not one. Exclude keywords can be 60 per keyword group. If over the limit, you cannot add more keywords.

📝 **Note:** Don't use keywords that contain an emoji. You can't save the keyword to the topic profile. Emojis aren't supported in keywords.

Example: # 😖

Media types filtering in topic profiles is the same as for Engage columns.

SEE ALSO:

Manage Engage Columns in Social Studio

Knowledge Article: Add or delete a Topic Profile in Social Studio

Manage Engage Columns in Social Studio

Workspace Permission Levels

Track Posts with a Topic Profile in Social Studio

To track, examine, and analyze social information that you deem important, you can create a topic profile in Marketing Cloud Social Studio. Depending on your user permissions, you can use topic profiles in Engage columns, Analyze social listening dashboards, or workbench datasets. You can even tailor a topic profile to follow a social media handle.

1. Create a topic profile from one of the locations that is the most convenient to you:

    • Admin—Click **Topic Profiles** and then **+ Add New**.

    • Analyze Social Listening dashboard—In Analyze, click **Dashboards** and open the dashboard. Click the option arrow and then click **Bulk Edit Sources**. To create a topic profile, **Create New Topic Profile**.

    • A social listening dataset in an Analyze workbench—In Analyze, click **Workbenches**. Enter a workbench or create a workbench. Click **Add New Dataset** > **Topic Profile** and then click **Create New Topic Profile** when adding or editing sources in a social listening dataset.

    You can create a topic profile from multiple locations, including from where you currently are in Social Studio.

2. Name the topic profile.

    💡 **Tip:** You can rename the topic profile at any time by clicking the title.

3. Select the topic profile type.

4. Add at least one keyword.

5. To change the topic profile name, click ✏️ .

6. To add a keyword group, click **Create Keyword Group**.

    To create a topic profile with just filters, media types, and source groups, click **Back** to go to the Keywords & Filters tab. At the source group field, add the specific social network handle.

    The keyword groups capture all mentions from a specific handle that are not keyword-matched.

7. You can further customize the topic filters and filter by language, media types, or region.

    a. To specify the languages the topic profile searches, click **Language** and select one or more languages. Or, click **Select All**.

    b. To specify the media types to include in the topic profile, click **Media Types** and select one or more media types. Or, click **Select All**.

    c. To specify the regions that the topic profile recognizes, click **Regions**, and select one or more regions. Or, click **Select All**.

    d. To save the selections and return to the Create Topic Profile inspector, click **Save**.

8. If you are in a testing tenant or an agency, on the Info tab, select **Activate Topic Profile**.

    a. Enter a PO number.

    Only social marketing or advertising agencies using Social Studio enter a purchase order (PO) number. For other users, it doesn't matter what you enter for a PO. To activate the topic profile, enter some text.

    b. Click **Save Topic Profile**, and the new topic profile appears in the list.

    After you select each of the filtering options, the Estimated Monthly Volume (EMV) is recalculated based on your Topic Profile selections. Including more filtering option selections creates a higher EMV.

9. After you create the topic profile, share it with the workspaces you want.

Edit a Topic Profile in Social Studio

Follow these steps to edit a topic profile in Marketing Cloud Social Studio. Even after a topic profile is added to an Analyze dashboard or workbench, you can still edit the topic profile. When specifying Instagram in the topic profile, the topic profile only collects information from Instagram Business posts.

Ensure that you have the user role permissions for topic profiles.

1. Click your avatar, and select **Admin**.

2. Click **Topic Profiles** or **Manage** in Topic Profiles panel.

3. To open the Edit Topic Profile Inspector, click a topic profile.

    💡 Tip: To rename the topic profile, click the title.

4. Edit the topic profile.

    - Filter by languages, media types, and regions.

    - Add, remove, or edit keyword groups.

      📝 Note: To complete the topic profile, add keywords to a keyword group

    - Add, remove, or edit source groups.

5. Click **Save Topic Profile**.

SEE ALSO:

Add a Source Group in Social Studio

Delete a Source Group in Social Studio

Edit a Source Group

User Role Permissions in Social Studio

Import Multiple Keywords to a Topic Profile in Social Studio

You can add multiple keywords to a Marketing Cloud Social Studio topic profile instead of adding them one at a time. Add the keywords to a comma-separated value (CSV) file and import the file. You can also import keyword groups from another topic profile.

When you import new keywords that match existing keywords, the imported keyword overwrites the existing keyword. Before uploading a file, save a copy of the topic profile's current keyword groups.

📝 Note: To complete a keyword upload, the topic profile must be active and have at least one keyword.

1. Click your avatar and select **Admin**.

2. Select **Topic Profiles**.

3.
    Click the topic profile you want to add keywords to, and in the Edit Topic Profile inspector, click ⚙ .

4. Click **Import Keyword Groups**.

    📝 Note: If your topic profile doesn't have a keyword group, this file contains only a header row.

    a. If the topic profile already has keywords and you want to download a copy of the keywords, click **current keyword groups**. The keywords are downloaded as a CSV file.

> After you export the keyword group, don't change the headers in the CSV file or the import won't work.

    b. Add, remove, or update your keyword groups. Each keyword group can have up to 1,000 total keywords and up to 60 exclude keywords.

    c. Click **Upload File**, browse to the file, and click **Open**.

5. Click **Import**.

SEE ALSO:

Manage Keyword Groups in Social Studio

In Marketing Cloud Social Studio, create a keyword file to import keywords to a topic profile and also export keywords from a topic profile to share. The keyword CSV file follows a certain format. You can also export the keyword groups from an existing topic profile to use it as a template to add new keywords.

Add Source Groups to Topic Profiles

To include all content or by keyword matched content, include source groups in your topic profiles in Social Studio. Both work intuitively with Facebook Page sources

1. To gather all the posts from the pages in your source group, select **Include All Content**.

2. Use **Keyword Matched Content** to include posts from that page that contain your topic profile keywords.

3. Ensure that your source group is associated with your topic profile as a Keyword Matched Content source group. This association continues to get only keyword matched posts instead of all posts from the page.

Macros in Social Studio

Create macros in Marketing Cloud Social Studio to apply publishing actions consistently to posts you create. Macros also assist workflow processing of posts coming into an Engage column.

Macros allow you to configure instructions for commonly used actions and apply them to multiple posts at the same time.

💡 **Tip:** Using macros saves time and provides a more uniform approach to how your team engages with posts.

Use Social Studio to create two types of macros.

- Engagement Macros: Select a single macro button and apply various actions to multiple posts at the same time. For example, use an Engagement macro to:
  - Add a post to one or more workspaces.
  - Apply the same Status, Priority, Assignment, Sentiment, Classification, Post Labels options to a post.
  - Apply the same note and Author Labels.
  - Hide a post that matches the same options in an Engage column.
  - Send the post to a specified Salesforce org.

- Publishing Macros: Process posts from the Publish calendar using a consistent workflow. You can automatically apply when creating a post. You can create publishing macros in the Workspace Settings section. For example, use a publishing macro to:
  - Auto apply a macro to new posts.
  - Apply multiple social accounts to a new post without selecting them each time.

    💡 **Tip:** To ensure consistency, apply the same post labels to a post.

  - Apply the same Facebook Gating and Feed Targeting options in new posts.
  - Apply the same LinkedIn Targeting options in new posts.
  - To track visits, apply the same DMP parameters to URLs that are in new posts for consistency.

📝 **Note:** Publishing macros exist only in a workspace and cannot be shared with another workspace.

Super Users and workspace Admins of any role can create macros.

Macro ownership can't be transferred from one owner to another. If the user is disabled, a Super User or Admin only can modify those macros.

Classify and Process Incoming Social Studio Posts with an Engagement Macro

The Social Studio engagement macros allow you to create a case or a lead for a Salesforce org from an incoming Marketing Cloud Social Studio post. With the macros, you can classify and process incoming posts and send the posts to a Salesforce org. You can even apply the engagement macro to other posts in the thread.

1. You can create the engagement macro from different areas in Social Studio:
   - When you want an engagement macro that looks at a post in Engage, click **+Create New** in the Macros tab of the post's Post Inspector in Engage.
   - When you know what engagement macros you need beforehand, click **+ Add New** in the Engagement Macros block in Social Studio's Admin settings.

2. Name the macro.

   💡 **Tip:** Use the macro's purpose as the name.

3. Add a macro description.

4. Click **+ Add to Workspaces** and select the workspaces.

   💡 **Tip:** You can also type the workspace name and then click the name of the workspace to select it.

5. Click **Add**.

6. Complete the macro **Options**, if necessary.

   💡 **Tip:** To automatically assign a user to an incoming post, create a rule in Social Studio Automate. Specify the target social account as the data source and set the frequency to **Realtime**. Complete the rule by adding the Assignment rule action. Specify the user in your org who is processing the posts.

7. Save the macro. Then either quit or create another macro.

SEE ALSO:

Rule Actions in Social Studio Automate

Configure a Real-Time Data Source

Create a Publish Macro in Social Studio

Create a publish macro in a Marketing Cloud Social Studio workspace.

1. Access the workspace settings.

2. Click **+Add New**.

3. Enter a unique macro name.

> 💡 **Tip:** Include the workspace name in the macro name. Social Studio considers macros with the same name, even if they're in different workspaces, as duplicates.

4. Enter a macro description.

5. Click **+ Add Attribute**.

6. Choose the attribute individually or select the available checkbox to add them all.

   a. Add one or more publish labels.

      • If the label is new, Add New appears after the label.

      • To select, click **Enter**.

   b. Add one or more social accounts.

      • To add all the accounts added to the workspace, click **Add all accounts**.

   c. Add options for LinkedIn Targeting.

   d. Add a Web Analytics Profile.

   e. Use YouTube Categories, Tags, and Playlists

> 📝 **Note:** Select a YouTube account before adding YouTube playlists to the Publish Macro.

   f. Set Facebook News Feed Targeting options.

> 📝 **Note:** If the post is not for Facebook, these attributes are ignored. Also, if applying the macro to a post on Social Studio Mobile iOS, the attributes in the macro are not applied to the post.

   g. Set Facebook Restricted Audience options.

> 📝 **Note:** If the post is not for Facebook, these attributes are ignored. Also, if applying the macro to a post on Social Studio Mobile iOS, the attributes in the macro are not applied to the post.

7. Click **Add** and then **Save**.

SEE ALSO:

Create a Post in Social Studio

Publish in Social Studio

Publish Labels

Set YouTube Categories, Tags, and Playlists

Target LinkedIn Posts

Target Facebook News Feed Posts in Social Studio

Use Restricted Audience Targeting in Facebook Posts in Social Studio

Web Analytic Profiles in Social Studio

Tailor Reports in Social Studio to Gather the Information You Want

In Social Studio, you can generate reports based on various parameters. Parameters can include content performance by social account, workspace, or across all workspaces in the Social Studio organization. You can also create post reports for social accounts or topic profiles and customize the metrics to pull data for a specified date range. The post reports can be set to run on a schedule, for a specified period, or every so often. You can have Social Studio deliver the reports on specific dates and times.

📝 Note: **EU Copyright Directive**

Under Article 15 of the EU Copyright Directive, Marketing Cloud Social products must remove post content for mainstream news, aggregator, and non-YouTube video content. The EU Copyright Directive is designed to give authors, artists, and publishers fairer remuneration for the use of their work online. The directive also protects works that are copyrighted.

Initially, the EU Copyright Directive affects all posts for these media types. The Social API is changed to restrict the social applications from getting the data for all posts, not just posts from EU countries. Users can still store content and search by keyword in Salesforce. The posts that have the affected media types show as "Content Not Available" in Social Studio. Social Studio continues to show author information, post title, and link to the native post.

For broad listening data, the posts are restricted to show the avatar, title, and a link out to the original content. The affected media types are mainstream news, aggregator, or videos except for videos on YouTube. The test area shows "Content not Available".

Analyze Reports

In addition to using dashboards and workbenches in Marketing Cloud Social Studio Analyze, you can create reports on dashboards and posts. Social Studio formats the report in PDF for sharing or printing.

Create an Analyze Dashboard Report in Social Studio

You can create a dashboard report in Marketing Cloud Social Studio or base it on a current workspace dashboard. You can set filters and report metrics to customize the report.

Before creating dashboard reports, ensure that you have dashboards created in Analyze for the workspace. When creating a report, any filters set on the dashboard are automatically carried over to the report.

Specify the number of days for the report to gather, and set the frequency for a new report to generate. Social Studio saves the dashboard report as a PDF file for sharing outside of Social Studio.

1. Navigate to **Analyze**.

2. Click **Reports**.

3. Click **Create Report**.

4. Choose **Dashboard Report**.

5. Choose one or more social account dashboards.

6. Create separate reports for each dashboard using the same options or include all the dashboards in the workspace in the same report.

7. Choose the filters for the report. These filters are the same ones used to filter an Engage column.

   📝 Note: As you choose filters and other options, the preview section in dashboard reports shows a list of the cards. No changes are shown when you edit the filters. Applied filters affect the report, not the base dashboard. The dashboard is a template that you start your report from.

8. Select the timeframe for post inclusion, which is a rolling range, or a specific real-time date. The time is relative to today's date,

   - Relative: Today, Yesterday, This Week, Last Week, This Month, Last Month, Current and Previous Months, This Quarter, Last Quarter
   - Real-Time: 1 Day ago, Last 7 days, Last 14 days, Last 30 days, Last 60 days, Last 90 days

9. Drag the dashboard cards to the order that they appear in the PDF report.

10. To edit the individual card that appears on the report:

    a. Click the card in the Report Pages window.

    b. In Edit Feed, you can:

       - Choose the social accounts that appear in the report in Dataset.
       - Select individual filters in Filters.
       - Remove the page from report by clicking **Delete Page From Report**.

    c. To close, click **X**.

11. To change the report schedule, click the current schedule option.

    a. At Report Schedule, change the frequency to one of these options:

       - Never
       - Once
       - Daily - Set the start and end date of report generation using the popup calendars. To specify the Preferred Delivery Time, set the hour, minute, and AM or PM.
       - Weekly - Specify one or more weekdays using the **Days** dropdown. Set the start and end date of report generation using the popup calendars. To specify the Preferred Delivery Time, set the hour, minute, and AM or PM.
       - Monthly - To specify how a monthly report runs, either choose Day of the month or Day of the week in **Run by**. Set the start and end date of report generation using the popup calendars. To specify the Preferred Delivery Time, set the hour, minute, and AM or PM.

       The end date for the report cannot exceed 168 days. Any date after that is grayed out.

       📝 Note: The report automatically generates and arrives to members specified in sharing.

       The select schedule appears in **Schedule**.

    b. Click **Save Changes**.

12. When finished, click **Done**.
    After the schedule is set, the status changes to active. A list of created reports appears for you to choose.

13. To view the results of the report, click **View Results**.

14. You can delete the report or run the report:

a. To delete the report, click 🔽 , then **Delete**.

b. To run the report now, click 🔽 , then **Run Now**.

Track the Content Performance of Your Posts Using Social Studio Reports

You can track, analyze, and measure content performance using Content Performance Reports in Marketing Cloud Social Studio. You can run performance reports by workspace and by social network to determine if content meets established milestones and targets over time.

Social Studio gathers metrics such as likes, comments, and shares, depending on the time of the post.

If posted within...	Social Studio Pulls Data Every...
0–24 hours	Every 15 minutes
1–3 days	Every hour
4–7 days	Every 6 hours
8–14 days	Every 12 hours
15–30 days	Daily
31 or more days	Weekly

SEE ALSO:

Use Cross Workspace Performance Reports in Social Studio

Workspace Content Performance Reports in Social Studio

Post Reports in Social Studio

Use Social Studio's reporting to create and schedule reports in minutes. You can create post reports for one or more social accounts and topic profiles. Once you have the report, set the frequency to send reports daily or monthly on your schedule.

With content post reports, you can customize report metrics and include what is important to you. Set the frequency to automate the generation of your report and have it arrive daily to monthly when you need it. Include only the posts that matter to you with advanced filtering and relative time ranges. These reports include posts, their metrics, and workflows that were published during a specified time range for your selected social accounts. Content Post Reports are available on Desktop in PDF or CSV file formats. Use the Comma-Separated Value format for further filtering and sorting. To share the post report in a graphical format as it appears in Social Studio, use PDF format.

SEE ALSO:

Create a Post Report in Social Studio

Delete a Post Report

Edit a Post Report

Share a Post Report

View and Download a Post Report

Real-Time Post Reports in Social Studio

To view a report of posts as they come in, use Marketing Cloud Social Studio's reporting. You can create post reports for each topic profile. Use the PDF report to review your brand mentions from anywhere. You can also include posts that are relevant to you with advanced filtering. Reports include only posts since the last report. You can set the report frequency to every 10 minutes, 30 minutes, hour, or 3 hours.

SOCIAL STUDIO MOBILE

To get closer to your customers on iOS devices and Android phones, use Marketing Cloud Social Studio Mobile. Use the same Social Studio functionality from anywhere as if you were sitting on your desk. Download the app for free from the iOS App Store or Google Play.

To ensure that you get the latest Social Studio features, sign up on our Marketing Cloud Salesforce Help for Marketing Cloud Release Communications. Specify Marketing Cloud under Interests.

Follow the steps at Marketing Release Communications.