Channel Admin Guide

Contents

LOG IN TO BUDDY MEDIA

Overview

Buddy Media is a social media marketing suite that enables you to publish integrated campaigns across Facebook, Twitter, YouTube, and your company websites. With Buddy Media, you will be able to build connections with your customers, increase fans and followers, publish engaging social applications, and extend social to your websites. The powerful dashboards and analytics in Buddy Media will help you understand engagement trends and conversion rates.

The Buddy Media suite contains the following products:

- **Buddy Media Dashboard**: On the dashboard, you can view the overall health of your social profiles. You can customize your dashboard to show the data you need to focus on.

- **ConversationBuddy**: You and your teams can create, manage and moderate conversations on company Facebook, Twitter, Google+ and LinkedIn accounts from a single interface.

- **ProfileBuddy**: In this area of Buddy Media, you can create, edit and maintain custom tabs on Facebook Pages. Choose from more than 50 sapplets (social applications) that you can customize to display unique and engaging experiences for Facebook fans.

- **ReachBuddy**: Similar to ProfileBuddy, ReachBuddy provides sapplets for you to create and deploy socially enabled content across the open Web.

- **ConversionBuddy**: This area enables your company to apply customizable social media buttons to your social media content. This will drive traffic and sales when customers share your content.

- **Analytics**: Analyze performance metrics in real time and view stream activity. You can measure the performance of activity compared to previous time periods and other Facebook Pages, as well as filter results based on date ranges and client view.

Access Buddy Media

Your Buddy Media Channel will have a unique web address (URL). When you are set up as a Channel Admin, you will receive a welcome email, prompting you to click a link to set your password.

Note: This welcome link will expire after 48 hours.

To log in to your Channel, complete the following steps:

1.   Navigate to your unique Buddy Media URL.

2.   In the **Email** field, type your email address.

3.   In the **Password** field, type your password.

4.   Select the **Remember me on this computer** checkbox.

5.   Click **Login**.

Password Requirements

Buddy Media has login features designed to protect your company's data. In some circumstances, you can change these settings by contacting Marketing Cloud Support.

Login Feature	Details
Unique User Identifiers (IDs) to ensure that activities are attributed to individuals	Every User is assigned a unique ID. Channel Admins add Users.
Password length controls	Default password length is 8 characters.
Password complexity requirements	Password must contain three of the four following items: Capital letter Lower case letter Number Symbol
Controls on the number of invalid login requests before locking out a User	Six attempts are permitted before lock out.
Ability to specify lockout time period	Contact Support to unlock this feature.
Password history controls to limit password reuse	You cannot reuse one of your most recent six passwords.
Controls to force a User password to expire after a period of use	The default time before a password needs to be changed is 180 days. Contact Support to change this option. (Options are 15, 30, 90, 180, 270, and 360 days.)
Ability to delegate User authentication or federate authentication via SAML.	This feature is not available.
Password logging	Passwords are not logged under any circumstances.
Encryption	bcrypt - Salted.

NAVIGATE THE WELCOME DASHBOARD

The Welcome Dashboard is the first screen you see when you log in to Buddy Media. It provides you with a high-level introduction to the products in your Buddy Media Channel.

To navigate around the Welcome Dashboard, click one of the product titles to navigate to that section of Buddy Media. Alternatively, below the product title, click Learn More to open a new window with more information about that product.

NAVIGATE AROUND THE BUDDY MEDIA SUITE

When you no longer need the Welcome Dashboard, you can remove it by clicking the X button on the right hand side of the tab. You will receive a warning notification that the action cannot be undone. If you choose to delete the Welcome Dashboard, you will be taken to your Buddy Media Dashboard each time you log in.
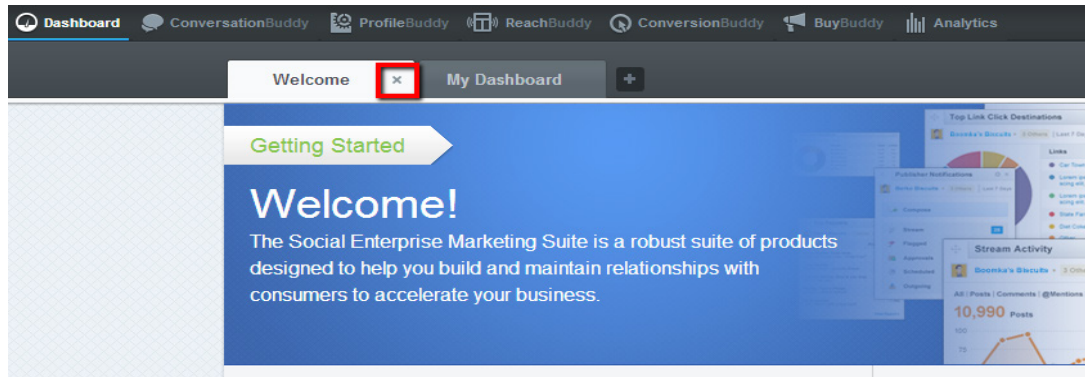
You can navigate to any of the products in the suite by clicking its name on the top navigation menu bar. If you want to have more than one area of the suite open at a time, right click the product name and select Open link in new tab or Open link in new window.

There are several menu items on the top right of the navigation menu bar. These are, from left to right:

- Notifications (bell icon): Click this icon to view your notifications.

- Asset library (drawer icon): Click this icon to access the media and sapplets available to you. You can add media to the library by selecting a folder from the left hand menu and clicking Add.

- User name drop-down menu: Select the drop-down arrow to access your account settings, view Social Accounts, perform Channel Admin tasks, or log out of the Buddy Media suite.
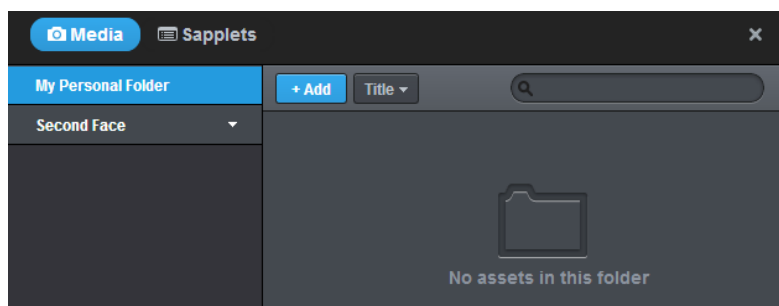
- Your Channel Name: Click to return to your Dashboard view.

- Help: Click to access a range of video tutorials or to send through a contact request for support.

CHANGE YOUR ACCOUNT SETTINGS

After logging in, check your account settings to make sure that your account information and time zone are correct. The time zone in your user account settings determines the publishing time of your content, and so this is an important aspect to confirm. To review your account settings, complete the following steps:

1. Log into your Buddy Media Channel.

2. In the top navigation bar, click the drop-down arrow next to your username.

3. Select **My Account**.

4. Review the menu items in the left hand column:

   - **Basic Info**: Select this option to change your name, title, organization, address, and time zone details. You can also access this area to change your password.

   - **My Subscriptions**: Select this option to view the reports to which you have subscribed. These reports are emailed weekly on Mondays.

   - **Notifications**: Select this option to choose from two options. **Recent Notifications** displays all notifications sent to you within the last 30 days. **Settings** enables you to specify your notification preferences.

SET UP YOUR CHANNEL

After checking your settings, your first major task as a Channel Admin user will be to plan out your Buddy Media Channel. How you set up your company's Channel will have a major impact on your user groups, management of social media profiles, and your analytics and reporting. Before taking any action, take some time to consider your company's structure and how social media profiles are organized and managed.

Understand the Buddy Media Channel Hierarchy

Your company's Buddy Media Channel is set up across three levels:

1. **Channel** This is the overall Buddy Media suite for your company, which contains all your content, social media profiles, and users.

2. **Clients** Think of Clients as folders that you will use to organize your company's social media efforts. You should organize your Clients in a way that enables social media profiles for different brands and different regions to be managed in a logical manner.

3. **Social Accounts** These are your company's social media accounts (Facebook, Twitter, Google+, YouTube, and LinkedIn).

Read through the following examples of Channel setups to identify the best structure for your Channel.
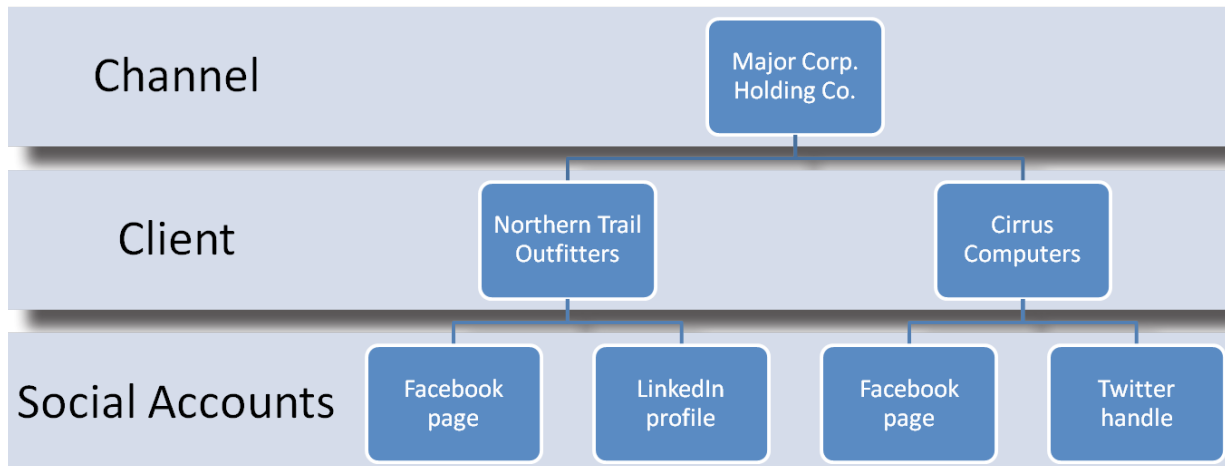
Example Setup: Small Company
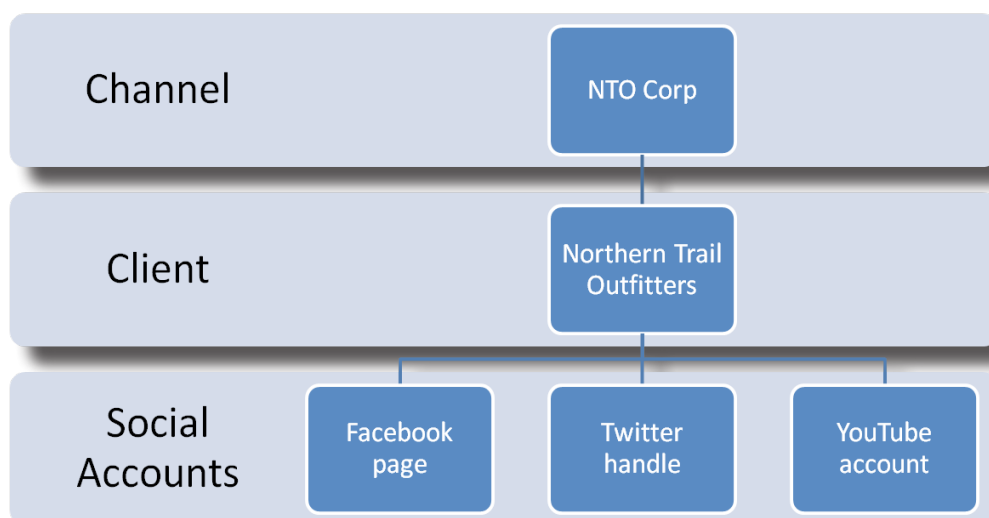
In this example above, NTO Corp. is a small company with stores called Northern Trail Outfitters located across the United States. Northern Trail Outfitters has a Facebook page, a Twitter handle, and a YouTube account. Because all

these social media accounts relate to a single brand in one geographic region, it makes sense to set up only one Client for the store, with all the social media accounts added to it.
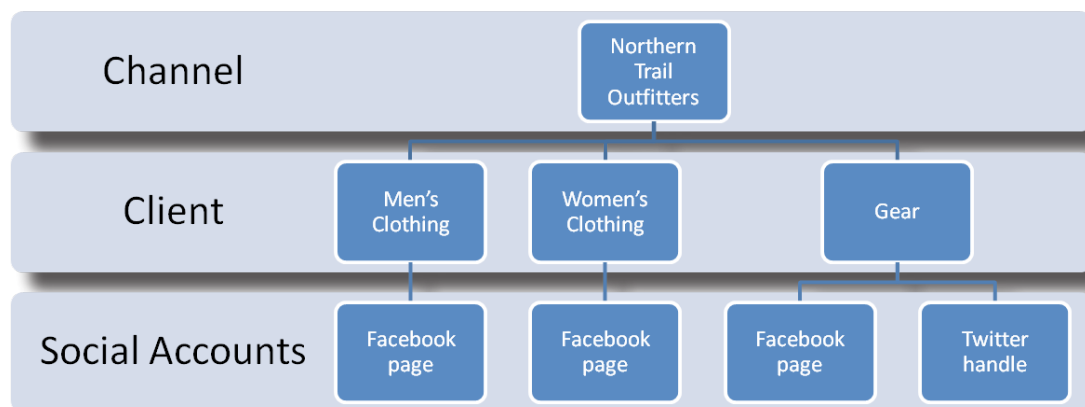
Example Setup: Brands

Channel		Major Corp. Holding Co.	
Client	Northern Trail Outfitters		Cirrus Computers
Social Accounts	Facebook page LinkedIn profile		Facebook page Twitter handle

If your company has several brands, each with social media profiles to manage, the most effective way to set up your Channel would be to create a Client for each individual brand. You would then add the brand social media profiles to each Client. This type of setup is perfect for large enterprise companies that have several different brands and different product types.

In this example, Major Corp. is the overall company and owns two main company brands: Northern Trail Outfitters and Cirrus Computers. These two brands each have their own social media profiles that are managed by different social media teams.

Example Setup: Product Lines

Channel		Northern Trail Outfitters	
Client	Men's Clothing	Women's Clothing	Gear
Social Accounts	Facebook page	Facebook page	Facebook page Twitter handle

Your company might have different products that you market through different social media profiles. In this situation, you could set up Clients for each product and add the appropriate social media profiles to each Client.

In this example, Northern Trail Outfitters is a company that uses different social media profiles to sell its womenswear, menswear, and active outdoor gear. For this company, it makes sense to create a Client for each of the product lines and add the social media accounts to the appropriate Clients.

Example Setup: Region
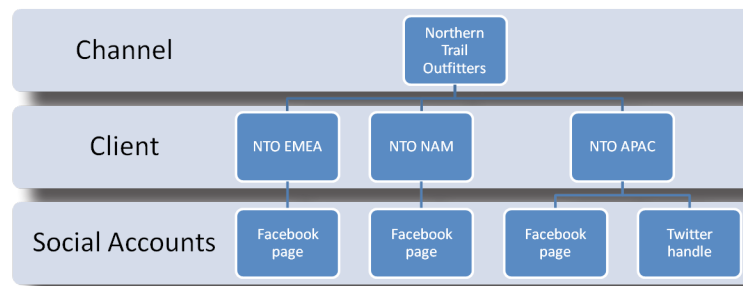
If your company has offices in different countries or regions and they will be using the Buddy Media Channel to market the same brand, the optimal setup would be to create a Client for each region. In this way, each region's social media profiles can be managed and reported on by the appropriate teams.

In this example, Northern Trail Outfitters has outlets in Asia Pacific, North America, and EMEA. Each region needs to market the company's products differently, and so the company has a different Facebook page for each region. The social media profiles are organized under Clients for the different regions.

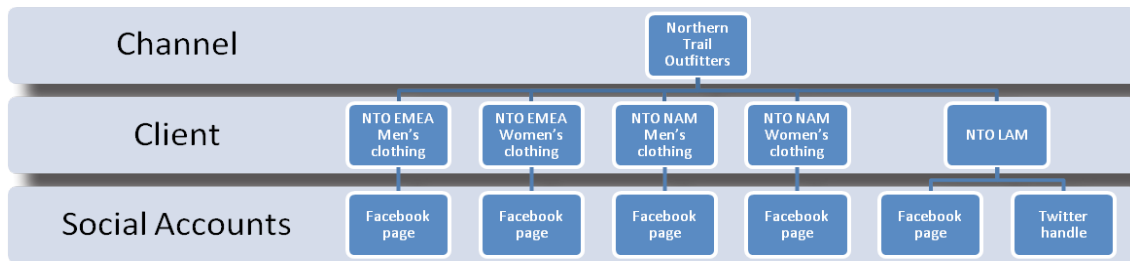## Example Setup: Business Function

If different business units in your company will be using Buddy Media, then it might make sense to set up your Buddy Media Channel with a Client for each business function. For example, if you have a Twitter handle for customer care issues, and other social media profiles for marketing, you could set up a Client for customer care and one for marketing.
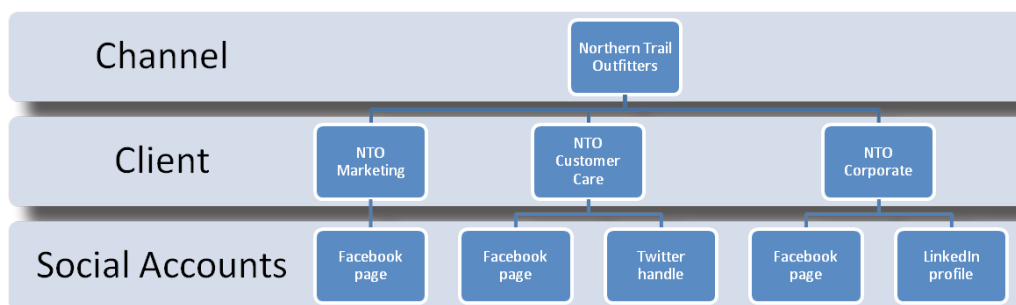
In this example, Northern Trail Outfitters has a Facebook page run by the Marketing Department, a Facebook page and Twitter handle run by the Customer Care department, and a corporate Facebook page and LinkedIn profile. These social media profiles are organized into Clients by business function.

Example Setup: Hybrid for Brands or Product and Region

If your company has several different brands or products that are marketed in different countries and regions, then you will want a hybrid setup. In this Channel structure, you would create a different Client for each product or brand by region.

Channel				Northern Trail Outfitters		
Client	NTO EMEA Men's clothing	NTO EMEA Women's clothing	NTO NAM Men's clothing	NTO NAM Women's clothing	NTO LAM	
Social Accounts	Facebook page	Facebook page	Facebook page	Facebook page	Facebook page	Twitter handle

In this example, Northern Trail Outfitters conducts business in different geographic regions. It has a different Facebook account for its menswear and its womenswear in two regions where it operates. These social media profiles are organized under Clients for each region and product line: EMEA Men's clothing, EMEA Women's clothing, North America Men's clothing, and North America Women's clothing. The company also operates in Latin America, but there, has only one Facebook page and a Twitter handle for all its brand lines. Those two social media profiles are organized under a Latin America Client.

ADD CLIENTS TO YOUR CHANNEL

When you have planned out the ideal Buddy Media Channel structure for your company, you can log into your Channel and access the Admin menu to set up your Clients and Social Accounts.

To add a Client, complete the following steps:

1. Log into your Buddy Media Channel.

2. To access the Admin panel, in the top navigation bar, click the drop-down arrow next to your username.
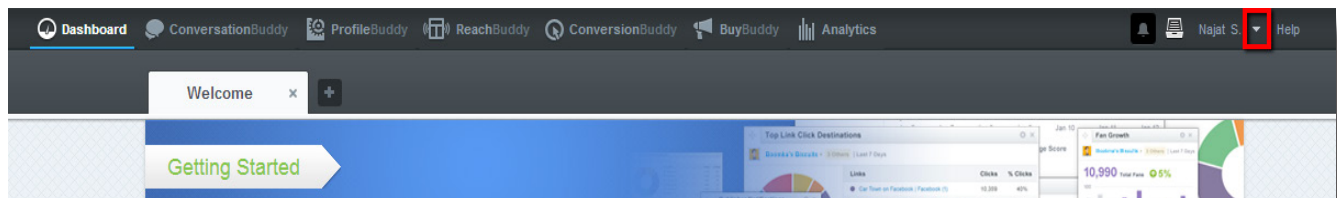
3. Select **Admin**.

4. In the **Admin>Clients** window, click **Add Client**.

5. In the **Client Info** window, complete the information for your new Client.

    Note: The name you enter in the Client Name field will be the name for this Client in the entire Buddy Media Channel. Choose a name that will represent the Social Accounts you will add to the Client. The only fields that you must complete are Client Name and Industry.

6. Click **Save**.

Repeat these steps as required to add additional Clients.

After you have set up a Client, you can check its details at any time by accessing the Admin panel, selecting Clients, and clicking on the Client name.

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ADD SOCIAL ACCOUNTS

With your Clients set up in your Channel, you can add Social Accounts to them by completing the following steps:

1. In the Buddy Media Channel, click the drop-down arrow next to your user name.

2. In the Admin panel, click Social Accounts.

3. Click Add Social Account.

4. Click in the Choose Client field, and select the Client to which you want to add a Social Account.

5. Click the button representing the type of Social Account you want to add.

   - If you choose a Facebook account, in the Enter Facebook Page URL field, type the URL and click Authorize. You will be directed to the Facebook page to verify your access.

   - If you choose Twitter, click Authorize to be directed to Twitter to verify your account details.

   - If you choose Google+, in the Enter Google+ Page URL field, type the URL of your account and click Authorize. You will be redirected to Google+ to verify your access.

   - If you choose YouTube, click Authorize to be directed to Youtube to verify your account details.

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- If you choose LinkedIn, in the Enter LinkedIn Company Page URL, type the URL of your company's LinkedIn page and click Authorize. You will be redirected to LinkedIn to verify your access.

After adding a Social Account, you will be redirected to your Social Accounts page. Click the name of a Social Account to view its details.

Reauthorize a Social Account

You can reauthorize your social account at any time. Buddy Media will indicate when a social account needs to be reauthorized by displaying a red triangle next to the social accout name. A green check mark next to the social account name indicates everything is functioning normally.

To reauthorize a social account, complete the following steps:

1. Log into your Buddy Media channel.

2. Click on your name in the upper right corner of the suite and select Social Accounts from the drop-down menu.

3. Next to the social account, click ReAuthorize.

Delete a Social Account

If you delete a social account all content, tabs, tab versions and analytic metrics will be deleted as well. To delete a social account, complete the following steps:

1. Log into your Buddy Media channel.

2. Click on your name in the upper right corner of the suite and select Social Accounts from the drop-down menu.

3. Next to the social account, click the X icon.

Note: You must be a Channel Admin to delete a social account.

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SET UP USER GROUPS AND PERMISSIONS

Buddy Media has a robust set of permissions to give you complete control over who is able to view content on your company's social media profiles, who can write and edit content, and who can publish to social profiles. A best practice before adding any users to the Channel is to create user groups and set permission levels for each group to reflect the types of user roles within your organization. This enables you to quickly add new users to a group to grant them the correct level of suite access that is appropriate to their role and responsibilities.

Basic permission settings include:

- **Read**: The ability to view all content and analytics.

- **Edit Content**: The ability to edit content, or submit content and posts for review and approval.

- **Schedule and Publish**: The ability to publish and/or schedule content. Users with these permissions can also approve and publish content from other users (users who only have Edit Content permission).

When you have configured user groups, you can add users to your Buddy Media Channel and assign them to the appropriate groups.

Admin User Groups

Two types of user groups are set up automatically in the Buddy Media Channel. These are the **Channel Admin** group, which is an initial group set up when your Channel is created, and **Client Admin** groups. These are created automatically each time you set up a new Client.

Channel Admin Group

Users assigned to the Channel Admin group have the highest levels of permissions within the Channel. All Channel Admins can add users and grant permissions. They can also add Clients to the Channel, and add any social media profile.

In ProfileBuddy, a Channel Admin can access the Category level and all Category content. The Category is a template for custom Facebook content, like the Master Slide in PowerPoint. A Channel Admin can also add in multiple Networks and Network Profiles. A network is where a canvas is rendered. (Please see the section entitled Set Up ProfileBuddy for more information.)

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Client Admin Group

Any users you assign to the Client Admin group have permissions associated with that Client and everything that exists within it. They can add social profiles for Twitter, YouTube, Google+, and LinkedIn. They are also granted permissions to the ReachBuddy product. Client Admins cannot add users to Buddy Media.

Configure User Groups

In addition to these groups, you can configure as many user groups as you need for specific business functions within the Channel, and set permissions for the groups depending on what the users will need to be able to do. For example:

- You could create user groups for the teams who will manage each social media account in a Client. You could set permissions so that users can only view, author, and moderate content for their assigned Social Account.

- You could create a user group for a customer service team that would only enable the team to view incoming Twitter posts to the customer service Twitter handle and respond to them.

- You could create another group for a team that needs to be able to view content for analytics purposes, but should not be able to create published content or moderate content in any way.

- You could create a group for interns, who have the ability to author posts, but not to publish them. The authored posts would be flagged as requiring approval before publication.

Important: Users who are not Channel or Client Admins will be able to view the Social Accounts page in the Admin menu, but no other Admin content. They will be able to reauthorize the Social Accounts you give them access to, and view the Edit page (although they will not be able to see Tab information for Facebook pages.)

To set up a new user group, complete the following steps:
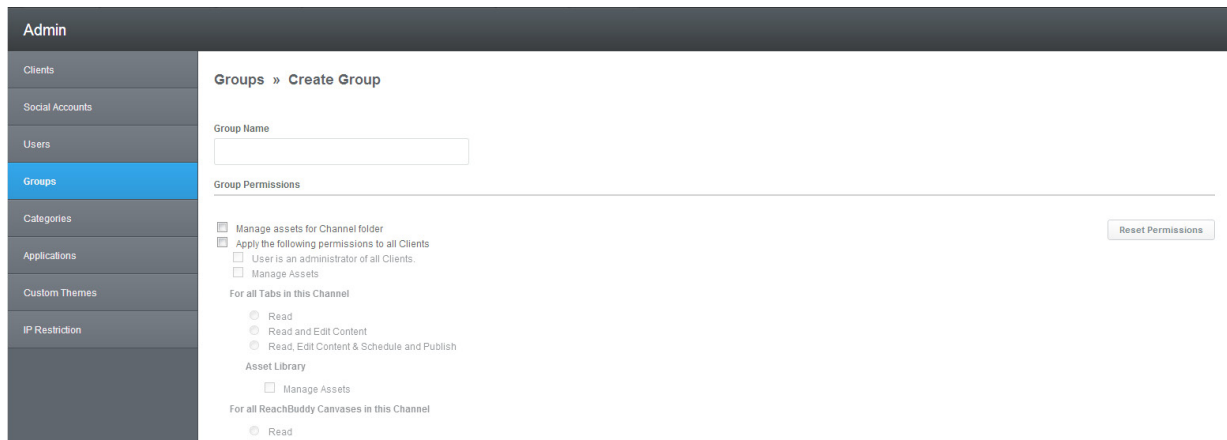
1. Log into your Buddy Media channel with the Admin account credentials provided to you.

2. In the top navigation bar, click the drop-down arrow next to your username.

3. Select Admin.

4. In the Admin section, in the left-hand menu, click Groups.

5. Click Add Group.

6. Type a group name. (Use a name that describes the permissions within the group or the type of user group to keep groups organized and easy to manage.)

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7. Set required permissions by scrolling through the hierarchy of Channel, Client, and Social Profiles. Select the level of permissions for users in this group by clicking the appropriate checkboxes.

8. Click Save.

Note: You can set permissions so that they apply to all Clients in your Channel or to all Pages in a Client. If you select that Users in the group should be administrators of all Clients or all Pages in a Client, these permissions are automatically selected:

•   Read, Edit Content, Schedule and Publish content, and manage assets for all Tabs.

•   Read, Edit Content, Publish, Delete, and manage assets for all ReachBuddy Canvases.

•   Full authoring rights, moderation rights and publishing rights for all Facebook pages.

•   Full authoring rights, publishing rights, moderation rights and ability to manage assets for all Twitter streams.

•   Full authoring rights, moderation rights, and publishing rights for all Google+ accounts.

•   Full management of Video content and Brand Channel Content.

•   Full authoring rights, publishing rights, and asset rights for all LinkedIn profiles.

•   Access to analytics for all ConversionBuddy sites.

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For users other than administrators, you can set permissions for different social media profiles and assets as listed in the following table:

Media	Permissions
Manage Assets	Users can manage assets for the entire Channel, all Clients, specific Clients, or specific Pages.
Tabs	Specify whether users can perform the following tasks for Facebook Tabs: • Read (use this setting for users who need data for analytics) • Read and Edit Content (make and save changes to content) • Read, Edit Content & Schedule and Publish • Manage Assets
ReachBuddy canvases	Specify whether users can perform the following tasks on canvases: • Read (view content and analytics for the canvas) • Read and Edit Content (make changes and save, but don`t publish) • Read, Edit Content, Publish, Delete (publish changes and delete content) • Manage Assets
Facebook Walls	Specify whether users can **View Stream** or **View and Moderate Stream**. If View and Moderate Stream is selected, choose from the following rights: Authoring rights: • Write comments • Write and schedule posts (these posts will appear in the Waiting for Approval queue) Moderation rights: • Delete posts and comments from others • Delete posts and comments from wall owner • Manage filters

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Media	Permissions
Facebook Walls	Publishing Rights (grant to users who should be able to approve users who only have authoring rights): • Publish posts • Publish comments Country and Language Rghts • Restrict rights to specific countries (enter country) • Restrict rights to specific languages (enter language) Restrict rights to specific languages (enter languages)
Twitter Accounts	Specify whether users can **View Stream** (if this option is selected, this is the only permission option for Twitter) or **View and Moderate Stream**. If you select View and Moderate, choose from the following rights: • Authoring Rights: Compose Tweets • Publishing Rights: Publish and Moderate Outgoing Tweets • Moderation Rights: Delete Tweets from Account Owner • Manage Assets
Google+ Profiles	Specify whether users can **View Stream** (if this option is selected, this is the only permission option for LinkedIn) or **View and Moderate Stream**. If you select View and Moderate, choose from the following rights: Authoring Rights: • Write Comments • Write and Schedule Posts Moderation Rights: • Delete Comments from Others • Delete Posts and Comments from Profile Owner

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Media	Permissions
Google+ Profiles	Publishing Rights: • Publish Posts • Publish Comments Asset Library: Manage Assets
YouTube Channels	As well as ability to manage assets, you can specify permissions for video content and brand channel content. Video content: • Read • Read, create and edit video content • Read, create and edit video content, edit default settings Brand channel content: • Read • Read, edit content • Read, edit content, publish
LinkedIn	LinkedIn permissions are: • Authoring Rights: Write and schedule Posts • Publishing Rights: Publish Posts • Manage Assets
ConversionBuddy	You can select the following permissions for ConversionBuddy sites: • Access to Analytics

Edit Permission Groups

If you have to adjust the permissions of a group you have set up, complete the following steps:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.

2. In the top navigation bar, click the drop-down arrow next to your username.

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3. Select **Admin**.

4. In the left hand menu, click **Groups**.

5. In the **Groups** list, select the group you want to edit by clicking its name or the cog icon next to it.

6. In the **Groups > View** window, review the **Group Settings** by clicking the arrows to expand each section. To make edits, click the **Edit** button.

7. In the **Group Name** field, type a new name for the Group if required.

8. Work through the Permissions tree and change settings as required.

9. Note: You can click the Reset Permissions button to clear all existing permissions before making edits.

Remember that any changes made to this Group will impact **all** users assigned to the Group. To check who has been assigned the permissions in the Group, click the **Users** tab.

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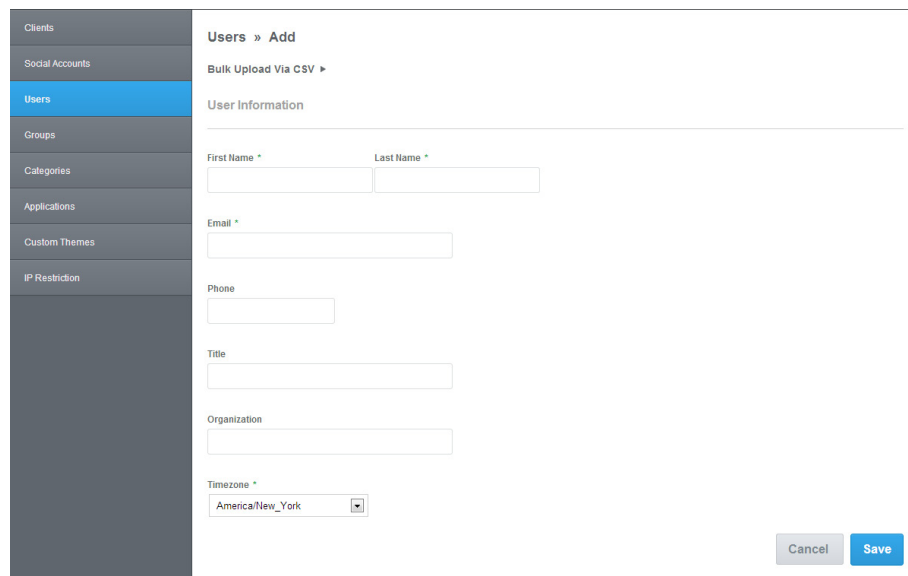
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CREATE NEW USERS
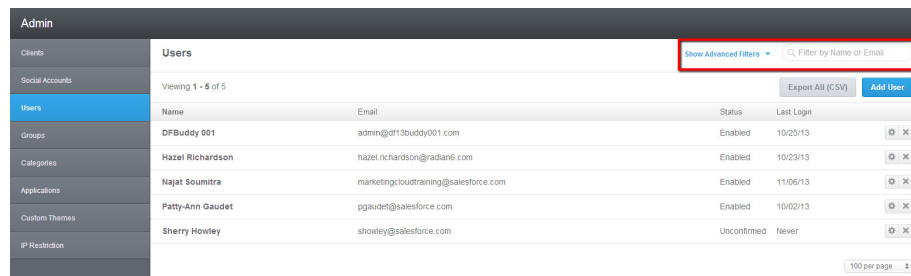
When you have configured User Groups, you can create users and then assign them to the correct Groups.

To add a user, complete the following steps:

1. Log into your Buddy Media channel.

2. In the top navigation bar, click the drop-down arrow next to your username.

3. Select Admin.

4. In the left hand menu, click Users.

5. In the Users field, click Add User.

6. Complete the User Information fields.

Note: The user's First Name, Last Name, Email address, and Timezone are the only compulsory fields. The Email address must be a valid email so that the user can receive their welcome link and reset their password.

7. Click Save. The User Group permissions tree will display.

Note: You will see two tabs: User Group and Groups. If you want to set individual permissions for this user, specify the settings on the User Group tab. However, it is recommended to click the Group tab and specify which group this user should belong to.

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8. To add the user to one of your User Groups, click the **Groups** tab.
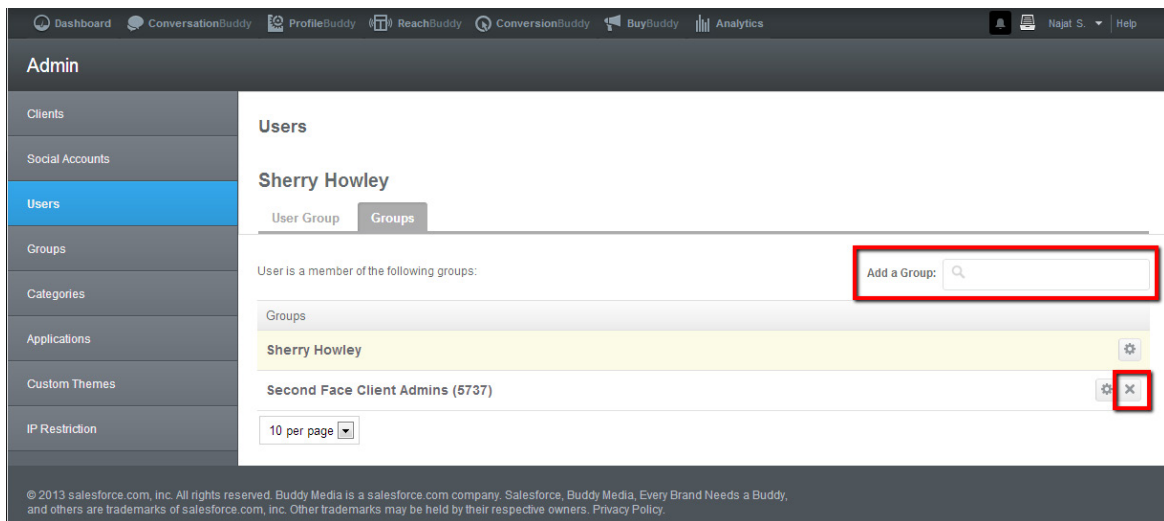
9. A list will display, showing the groups that the User is a member of. To add the User to another group, click in the **Add a Group** field and start typing the name of the group.

10. Available groups will display in the drop-down field. Click the required group.

   Note: Users can belong to more than one group. If you add a user to the wrong group, you can delete it by clicking the **X** button next to the name of the group.

11. When you have finished adding the user to groups, or have set the individual permissions, click the **User Group** tab.

12. Scroll to the bottom of the page, and click **Save**.

13. You will be redirected to the **Users> View** page. Click **Send Welcome Email**.

   Note: The user status will be unconfirmed until they receive their Welcome email and activate their account. Users must click on the link in the sent email within 72 hours to activate their account.

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EDIT USER PERMISSIONS AND USER GROUPS

After setting up users and assigning users to groups, you can easily edit their settings or remove users from the Buddy Media suite by returning to the Admin section of your Buddy Media Channel.

Edit User Permissions

1. Log into your Buddy Media channel with the Admin account credentials provided to you.

2. In the top navigation bar, click the drop-down arrow next to your username.

3. Select Admin.

4. Click Users.

5. To find the user, scroll through the list, or type a name or email in the Filter by Name or Email field.

   Note: You can also click Show Advanced Filters to find users who have access to a specific Client or Facebook page.

6. To edit the user details, click their name, or the cog icon to the right of their name.

7. Review the user information and scroll down to the Access & Permissions area.

8. Click Groups.

9. To add the user to an additional group, start typing the name of the group in the Add a Group field. Select the group from the drop-down list that displays.

10. To remove the user from a group, click the X button in the group list.

11. Click Save. A notification is displayed to indicate your changes were saved successfully.

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SET UP PROFILEBUDDY

Your company probably has Facebook pages that enable your customers to like or subscribe to your page posts and updates. As well as sending updates, you can also respond to queries and obtain access to insights and analytics about your fan base. Because these Facebook pages are integrated with Facebook's advertising system, you can easily advertise to Facebook's users.

Using ProfileBuddy, you can create interactive, customizable Tabs for your company's Facebook Page. A Tab is a custom canvas associated with a Facebook Page or YouTube channel. You can create engaging content to display on the Tab using ProfileBuddy sapplets (social applications). ProfileBuddy provides a range of sapplets for different marketing strategies that can be dragged into place on the canvas and edited to contain your company's content and images.

The following table lists the sapplets that you can use.

About Us	Language Selector	Questions and Answers
Amazon	Message Maker	Quiz
Calendar	My Picks	RSS
Countdown Clock	My Plans	Ratings
Coupon	Our Menu	Sent To A Friend
Facebook Events	Our Services	Share Button
Fan Count	Page Browser	Testimonials
Fan Only Offer	Personality Quiz	Twitter
Find Us On the Web	Photo Gallery	Video
Form Builder	Pinterest	Vote Up/Down
Foursquare	Pledge	Website Locator
Gifts	Poll	Widget
HTML	Post To Your Wall	YouTube
IFrame	Product Gallery	
Images	Puzzle	

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Plan Your Tab

If you decide to create a custom Facebook Tab, determine the following before setting it up in ProfileBuddy:

1. Do you want different versions of Tabs for different regions?

Tabs are displayed to Facebook users based on their IP address (primary parameter) and their language preferences. ProfileBuddy enables you to modify your Tabs to accommodate different audiences.

The standard version of a Tab is GL Global, which means everyone, regardless of their location and language preferences, sees the same content. You can modify Tab versions for audiences who are accessing Facebook from a different region or who speak a different language. For example, you could have a Canada English or Canada French Tab. If a customer accesses the Tab, and their language setting is English and they are accessing the tab from an IP address in Canada, they will be shown the Canada English version of the tab.

2. Do you want Client-level users to be able to edit or add content to the Tab?

As a Channel Admin, you will create a template for each Tab. This template is called a Category. You can create managed Categories, where you determine which sapplets are used and where they are placed on the Tab. You can also create unmanaged Categories, which allow users to change sapplets and edit content. Alternatively, you can create a hybrid template, with a mix of managed and unmanaged areas. As an example, this would be useful if you want your Tab to have consistent messaging, but different regions might need to adjust a coupon sapplet for a special offer.

3. What layout and sapplets will you use?

As a Channel Admin, you should map out the layout and which sapplets will be used on the Tab.

4. What will you name the Tab?

The tab must have a name that is different from other custom Facebook Tabs.

Set Up an Application Tab on a Facebook Page

To create a Facebook application Tab, first create an application in Facebook and then provision the Tab in the suite using two pieces of application info provided by Facebook: application ID and application secret.
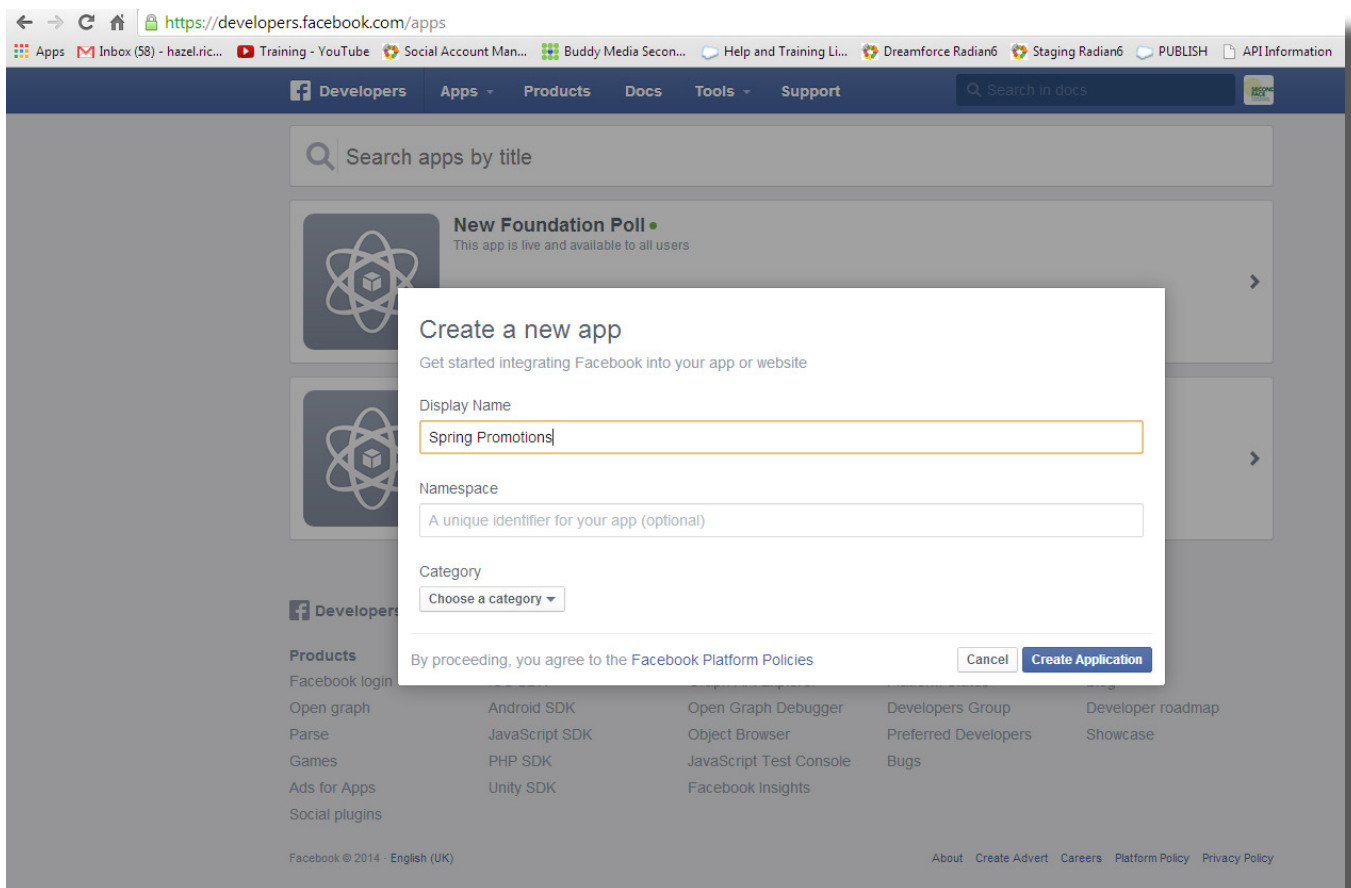
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To set up a Facebook application complete the following steps:

1. Log into Facebook using the personal account for your company page and open https://developers.facebook.com/apps.

2. Under the Apps drop-down menu, click Create a new App.

3. Type the Display Name for your app. (This should be the name of your tab and will display on Facebook when users share content from the tab. You must set a different name for each application you create.)

4. Type the Namespace. (This is a unique identifier for your app. It should be the same as the App Name, written in lowercase with an underscore between separate words. All numbers must be spelled out.)

   For example, if you wanted a custom Tab for a spring event, you could call the Tab Spring Promotions and the App Namespace spring_promotions.

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5. In the drop-down menu, choose a category for your tab.

6. Click Create Application.

7. In the Security Check window, type the Captcha code and click Submit.

8. A dashboard for your new app is displayed. Make note of the App ID and the App secret fields. You will need this information to set up your tab in Buddy Media. Click Show to display the App secret.

9. Click Settings.

10. In the Contact Email field, check your email address is correct.

11. Click +Add Platform.

12. Select App on Facebook.

13. In the Canvas URL field, type http://channel.buddymedia.com/fanpage/

14. In the Secure Canvas URL field, type https://channel.buddymedia.com/fanpage/

15. Ensure Canvas Fixed Width is set to No.

16. In the App Domains field, type buddymedia.com.

17. Click +Add Platform.

18. Select Website.

19. In the Site URL field, type http://www.buddymedia.com.

20. Click +Add Platform.

21. Select Page Tab.

22. In the Page Tab Name field, type the name you want to call your tab. (This can be the same as the App Name from step 3.)

23. In the Page Tab URL field, type http://tabs.buddymedia.com/?id=app ID. (Replace app ID with the app ID located at the top of the Facebook dashboard.)

24. In the Secure Page Tab URL field, type https://tabs.buddymedia.com/?id=app ID. (Replace app ID with the app ID located at the top of the page.)

25. Click Save Changes.

26. (Optional) To add additional developers to this app, select Developer Roles from the navigation bar on the left. The user creating the app is automatically added as an administrator. In the window that opens, under Developers, select Add and type the developer name or email.

Note: It is essential that you have the App ID and App Secret. You will need this information to create a Category.

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Create a Category

A Category is a template for Facebook Tabs and YouTube Brand Channels (like a PowerPoint Master Slide) that can be replicated across multiple pages. You need to create a Category for each app you create on Facebook.

You can control Categories at the Channel level so every version of a Facebook Tab looks the same, or so they can allow for specific custom content updates, such as place and language localization. Client users will only be able to edit the portions of the Category that you allow.

Choose the Category

First, choose the Category for the app you have created from the following options:

- **Managed (or Fully Managed)**: To build and launch a Category that acts as a template to roll out to multiple pages or tab versions, create a Managed Category. The Category will act as a template so your application tabs have the same look and feel across multiple Facebook Pages. Managed Categories are controlled by the Channel Admin. You define which sapplets populate tabs and the positioning of those sapplets within the layout. You can also "seed" (suggest) content in each sapplet. You can lock this seeded content (channel-controlled content) so that it cannot be changed, or allow client users to update the content in each sapplet (client-controlled content).

  In ProfileBuddy, managed sections of the Tab layout are identified with an orange border and a lock icon. Grey-headed sapplets (usually the header and footer) can only be controlled at the Channel level, whereas green-headed sapplets can be controlled at the Tab level.

- **Unmanaged**: To build and launch a category that acts as a template, but that can be changed or modified at a Tab version level, create a Blank Category by using an Unmanaged layout. In an Unmanaged layout, anything can be controlled by Client users. They have the choice of which sapplets they want to use.

  Use this layout to send out seeded content, suggesting what the layout should be. The user can make changes to this. Sapplet layout, positioning, and sapplet content are seeded to new tabs, but changes you make to the Category are not retroactively applied. Unmanaged Categories are controlled by the client user. Channel Admins can suggest which sapplets should be included within the tab but ultimately client users have the choice of which sapplets to implement, where those sapplets are placed, and their content.

- **Hybrid**: This layout is a combination of Unmanaged with a Managed header and/or footer. This layout is useful when you are planning to build out new Global tabs or Categories. It is ideal when you need some control over content (header and footer) but want to give Client users (country versions for instance) the ability to customize some of the information to their local market. There is no limit to how many sapplets can be included in the Managed or Unmanaged areas.

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After choosing a Category type for your app, complete the following steps to set up the Category:

1. Log into your Buddy Media channel.

2. Click your name in the upper right corner of the suite and select Admin from the drop-down menu.

3. In the left navigation, select Categories.

4. At the top right of the Categories window, ensure Facebook Tabs is selected. Click Add Category.

5. In the Name field, type a name for your Category. (This can be your brand or product name or something completely new. This name is only used internally within the suite and is not user facing. You should choose a name that will help you identify the category easily and keep all your category listings organized. It can match the application tab name created in the previous steps. For Blank categories, you should type Blank Category so that you can reuse the category for future single tab builds.)

6. In the Type field, click the drop-down menu to select the layout type:

   • For Managed categories, select Managed.

   • For Unmanaged categories or Blank categories, select Unmanaged.

   • For Hybrid categories, select Unmanaged and then select Add Managed Header and/or Add Managed Footer

7. Leave the Network field set to Facebook.

Categories » Add

Name *

Winter Promotions

Layout

Type

Unmanaged ▼

A layout that allows the client user to control what modules display, their position, and their contents. Predefined header or footer areas of the page can be reserved for Category Control by checking the appropriate boxes below.

☐ Add Managed Header

☐ Add Managed Footer

Network

Facebook ▼

8. At the bottom of the screen, click Add a New Application to this Category.

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9. In the Application ID field, type the App ID generated when you set up the Facebook application.

10. In the Application Secret field, type the App Secret generated when you set up the Facebook application.

11. Click Save. A confirmation message will display.

Publish the Category

To add a category/Tab to your company Facebook page, you need to check the layout and content on the Category and then publish it. Complete the following steps:

1. In the left hand menu bar, select Categories. Then, click your new Category.

1. In the Categories menu, select Content.

2. You will see a diagram of the layout for your Category (template). You can add rows and columns to the layout by clicking +Row and +Column.

3. If you want to add sapplets (content applications) to your layout, click Sapplets Library.
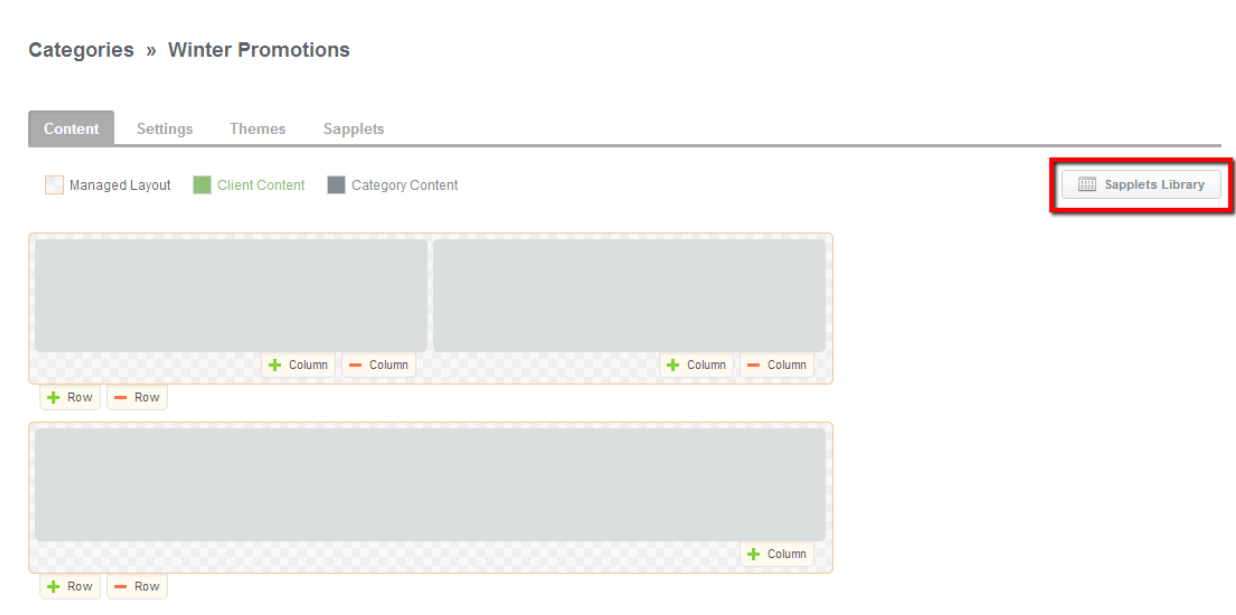
4. Click the cross arrow next to each required sapplet name and drag it into position.

5. An Alert will display. Click Category or Client to determine who can control the content in the sapplet.

    Note: Category-controlled sapplets will display Edit, Hide, and Delete buttons on the sapplet. Click Edit to

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change the content in the sapplet. Client-controlled sapplets will display Seed, Hide, and Delete buttons on the sapplet. Click Seed to create suggested content. Client users will be able to adapt this.

6. Click the Themes tab. Review the Default Theme setting. To change the default theme, click the drop-down arrow and select the required theme.

7. Click Save. Your new theme will be displayed in the Standard Themes list.

8. Click the Sapplets tab. Review the sapplets available to users. Deselect any sapplets you do not want to be available and click Save.

9. Click the Content tab. In the upper right hand corner, click Publish.

• If you have created a Blank category, you can publish the category as soon as it has been created.

• If you have created a Managed category, you can publish the category as soon as it has been created. You must republish it when you make additional changes before launch.

• If you have created an Unmanaged category, you should publish the category only when no further changes are required.

Connect your Category to your Application

After you have created and published your Category, you can create a ProfileBuddy tab on a Facebook page and connect the Category and application. Complete the following steps:

1. While logged into your Buddy Media Channel, click your name in the upper right corner of the suite, and select Social Accounts from the drop-down menu.

2. Locate the Social Account to which you want to add a tab and click the cog icon.

3. In the Facebook Tabs section, click Add Tab.

4. In the Select from available Categories drop-down menu, select the Category you created.

5. In the Choose Application drop-down menu, select the application you have added.

6. Click Create Tab. The tab will be listed in the Facebook Tabs section.

7. Next to the tab name, click Setup to add the application tab to your Facebook Page.

8. Click Add Tab. You will be redirected to Facebook and asked to select the Facebook page to which the application should be added.

9. Click Add Page Tab. You will be redirected to ProfileBuddy, where you can change the layout, design, and settings for your tab.

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Launch your Facebook Tab

After you have built out your sapplets and content within ProfileBuddy, you can publish your tab content by completing the following steps:

1. Log into Facebook in a browser window and open https://developers.facebook.com/.

2. Click **Apps**.

3. Select your application from the drop-down menu.

4. In the left hand menu, select **Status & Review**.

5. Next to the message, **Do you want to make this app and all its live features available to the general public?** change No to **Yes**.

6. Click **Confirm**.

7. Back in Profile Buddy, click **Publish Now**.

The tab is now live on Facebook.

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SET UP YOUR YOUTUBE BRAND CHANNEL

You can manage the content found on the custom Tab of a YouTube channel by setting up your brand channel in the social marketing suite. To follow the steps below, you will need to have previously set up your company's YouTube video channel in the Buddy Media suite.

To set up a custom tab for your YouTube brand channel, complete the following steps:

1. Log into your Buddy Media channel.

2. Click on your name in the upper right corner of the suite and select Admin from the drop-down.

3. In the Admin area, select Categories.

4. From the top menu, click YouTube Brand Channels.

5. Click Add Category.

6. In the Name field, type the Category Name. (This can be your brand or product name or something completely different. This name is only used internally within the suite and is not user facing. Choose a name that will help you identify the Category easily and keep all your Category listings organized.)

7. In the Type drop-down menu, choose the desired category:

    •   Managed Layout: Managed layouts are controlled by the Channel Admin. Channel Admins define which sapplets populate Tabs, as well as the positioning of those sapplets within the layout. Content within each sapplet can be 'seeded' by Channel Admins. These users have the option of locking seeded content (channel-controlled content) or allowing client-users to change/update the content (client-controlled content) within each sapplet.

    •   Unmanaged Layout: Unmanaged layouts are controlled by the client user. Channel Admins can suggest which sapplets should be included within the tab, but ultimately client users have the choice of which sapplets to implement, where those sapplets are positioned, and what content is used within each sapplet.

Note: If you have selected an Unmanaged Layout, you can choose to Add Managed Header or Add Managed Footer. These options reserve areas at the top and/or bottom of the layout for Channel Admins to control sapplets and content.

8. Keep Network set to YouTube.

9. Click Save. A confirmation message displays.

10. Select the Content tab.

11. You will see a diagram of the layout for your Category (template). You can add rows and columns to the

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layout by clicking +Row and +Column.

12. If you want to add sapplets (content applications) to your layout, click Sapplets Library.

13. Click the cross arrow next to each required sapplet name and drag it into position.

14. An Alert will display. Click Category or Client to determine who can control the content in the sapplet.

    Note: Category-controlled sapplets will display Edit, Hide, and Delete buttons on the sapplet. Click Edit to change the content in the sapplet. Client-controlled sapplets will display Seed, Hide, and Delete buttons on the sapplet. Click Seed to create suggested content. Client users will be able to adapt this.

15. Click the Themes tab. Review the Default Theme setting. To change the default theme, click the drop-down arrow and select the required theme.

16. Click Save. Your new theme will be displayed in the Standard Themes list.

17. Click the Sapplets tab. Review the sapplets available to users. Deselect any sapplets you do not want to be available and click Save.

18. Click the Content tab. In the upper right hand corner, click Publish.

19. Click Publish.

20. To agree to the YouTube Terms of Service, insert your initials and click Agree.

21. After the category has been created and published, from the left hand rail, select Clients.

22. Select the desired Client.

23. Click View Social Accounts.

24. Select the YouTube account.

25. Click Add Tab.

26. From the Select from available Categories drop-down menu, select the desired category.

27. Click Create Tab.

You have now added your YouTube brand channel to the social marketing suite. The content found on the custom tab of the YouTube channel can now be managed in ProfileBuddy. Repeat steps eleven through nineteen to set up multiple YouTube brand channels.

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ADD LOCALES TO A TAB

With ProfileBuddy, you can manage your custom Tabs at the global level and also at a more localized level through the use of Tab versions. The content of your Tab can be targeted to specific Facebook and YouTube audiences based on location (country) and language.

For a Facebook Tab, location is determined by a Facebook user's IP address (where they log into Facebook from) and language is determined by the primary language chosen within user Facebook account settings. For a YouTube Tab, location is determined by IP address, and language is determined by the language set in the user's Internet browser. By updating locales and creating tab versions, users visiting your custom tab will view the content created for that specific tab version and location.

To add locales to a tab, complete the following steps:

1. Log into your Buddy Media channel.

2. Click on your name in the upper right corner of the suite and select Social Accounts from the drop-down menu.

3. Select the desired Facebook or YouTube social account.

4. A list of Tabs for that account displays. Each Tab Name has Category, Application, and Locale information listed. Click the cog icon next to the Tab to which you want to add a locale.

5. Click Add Locale.

6. In the Choose Country drop-down menu, select the desired country.

7. In the Choose Language drop-down menu, select the desired language.

8. Click Create Locale.

9. In the Locales list, click on the new locale you just created.

10. The available Tab versions display. Click Enable.

Change Default Locale

To change the default Tab version that will be seen by Facebook users who do not meet the parameters of an existing locale, complete the following steps:

1. Next to the current default locale, click Change.

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2. From the Select Default Country drop-down menu, select the desired locale.

3. Click Submit.

Delete a Locale

To disable a Tab version so that it is not displayed on your Facebook Page, complete the following:

1. In your Buddy Media channel, access the Admin menu.

2. Select Social Accounts.

3. Click the Facebook or Youtube account with a Tab version you want to delete.

4. Click the Tab name.

5. Click the drop-down arrow next to the applicable locale.

6. Next to the locale, click the X button.

7. Click Delete.

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