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NAVIGATE TO CONVERSATIONBUDDY™

Overview

ConversationBuddy™ enables you to organize, manage and create social media conversations and statuses on Facebook, Twitter, Google+ and LinkedIn. Within ConversationBuddy you can create, organize, segment, label and flag. You can create a customized column view that enables you to view multiple social media Profiles at the same time, customize column parameters to track key conversation topics and respond quickly to posts.

Log In and Navigate to ConversationBuddy

1. Navigate to your unique URL for Buddy Media and enter your username and password combination.

2. Click **Login** to continue to the Buddy Media Social Marketing Suite.

Login Screen

Note - The Dashboard is the first screen you will see when you log in.

3. From the top navigation click **ConversationBuddy**.
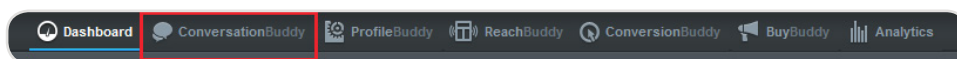
Menu Bar

Columns

The Home view is the default landing page when you navigate to ConversationBuddy, represented by the house icon. It consists of customizable tabs and columns.

- Tabs are comprised of columns and are a way to organize your columns into categories. You can create up to 5 tabs in ConversationBuddy.

- Columns display a stream of conversations related to one or more social Profiles within Buddy Media. You can create an unlimited number of columns in ConversationBuddy.

New users start with one untitled tab and 3 columns:

- **Posts From Others** - View all posts from your social Profiles made by others.

- **Posts From Brand** - View all posts you sent to your social Profiles.

- **Flagged** - View all flagged posts from your social Profiles.

Note - When you first get started with ConversationBuddy the scope of these columns is a combination of all Profiles and streams to which you have access.

To the right of the Home icon are: Outbox, Flagged, Tools and Analytics.
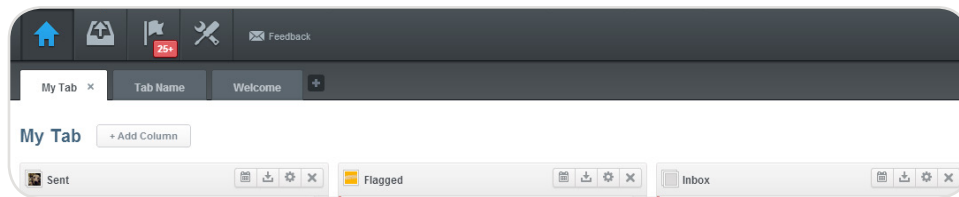
ConversationBuddy

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W www.salesforcemarketingcloud.com   E marketingcloud@salesforce.com

T @marketingcloud   T 1-888-672-3426

ADD AND NAME TABS

Overview

You can add and customize tabs in ConversationBuddy to help manage and organize your social media Profiles. Create up to five unique tabs to effeciently monitor your social Profiles. Tabs are customizable and all settings are unique to each user.

Add a Tab

To add a new Tab in ConversationBuddy, take the following steps:

1. At the far right of the last tab click the plus icon. A new tab is added to the list. It contains three columns: Inbox, Sent and Flagged.
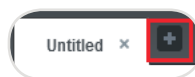
Add a Tab

Customize a Tab Name

A new tab has the default name Untitled. To customize the name of a tab, take the following steps:

1. Click on the name of a tab.

2. Type a name in the field provided.

Note - You can enter a maximum of ten characters in a Tab Name.

3. Press **Enter** to save the name.

Rename a Tab

ADD COLUMNS

Overview

Columns are a stream of conversations related to the social Profiles that you have access to within Buddy Media. You can create an unlimited number of columns in each tab. You can also customize column settings by name, Profiles, column type, media, status and/or labels.

Add a Column

To add a new column in ConversationBuddy, take the following steps:

1. Below the tabs, click the **Add Column** button to open the Add Column window.
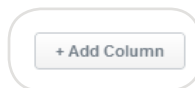
> + Add Column

Add Column

2. In the Add Column window, select a column type from one of the following options:

   - **Posts From Others** - View all of the posts that your fans and followers have posted to your social Profiles.

   - **Posts From Brand** - View all posts you acting as your brand have published out to your social Profiles.

   - **Flagged** - View all flagged posts from your social Profiles.

   - **Custom Stream Messages** - View all custom stream posts from your social Profiles.

3. Click **Add** to add the column with the default settings or click **Customize** to update the column settings before adding it to the tab.

Note - You can also customize the column settings after adding it to the tab.

Add Column   ✕

| Posts From Others | Posts From Brand | Flagged | Custom Stream |

Posts from Others:

View all of the content that your fans and followers have posted to your social profiles.

Add   Customize   Cancel
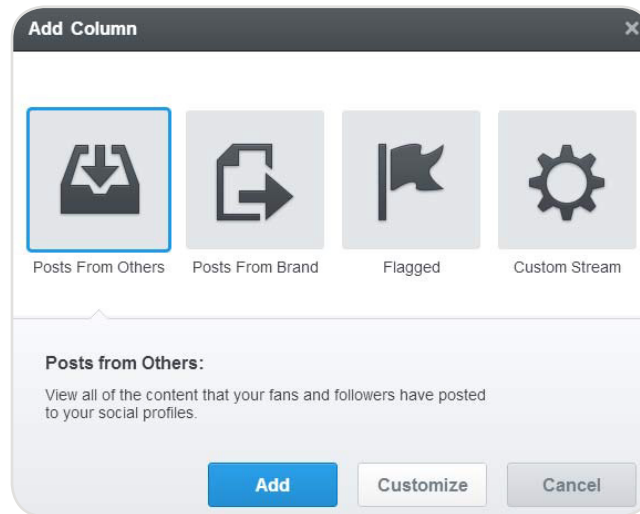
Add Column Window

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CUSTOMIZE COLUMNS

Overview

Each column provides the option to customize the content. At the top of each column there are four buttons to update the column settings:

- **Filter by Date** - Select this option to set a start date and end date from the calendar window.

- **Export Column** - Select this option to export the content in the column as a TSV (tab separated value) or CSV (comma separated value) file.

- **Edit Column** - Select this option to update the column settings.

- **Remove Column** - Select this option to delete the column from the tab.
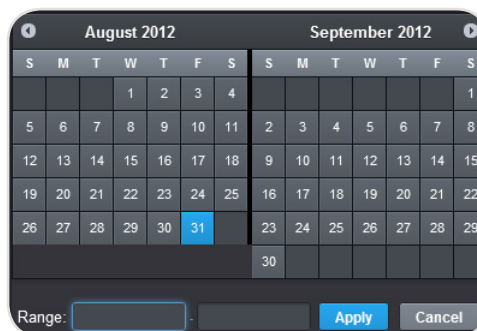

Column Options

Filter by Date

You can filter a column by a specific date range. To filter a column by date, take the following steps:

1. In the top right corner of a column, click the **Filter by Date** icon.

2. In the calendar window, select a start date and an end date. Or, at the bottom of the calendar window, type a start date and an end date in the Range field.

Date Range

3. Click **Apply**.

Note - The selected date range will display at the top of the column.
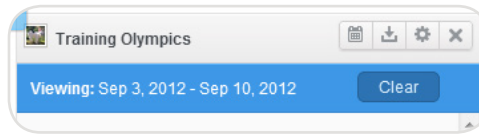
Selected Date Range

Export a Column

You can export all of the posts in a column as either a **TSV** or a **CSV** file. To export the items in a column, take the following steps:

1. In the top right corner of a column, select the **Export Column** icon.

2. From the drop-down menu, select CSV or TSV file type.

Note - CSV (Comma Separated Values) is more common. TSV (Tab Separated Values) is more complex. It displays information such as the date and time the post was sent, and post type. You can link back to the original post on the native social network..

Export Options

3. In the Export Column window, select a start date and an end date.

4. Click **Export**.

Export Button

Note - You will receive an email with a link to the exported file.

Edit a Column

You can edit a Column Name, Profiles, Column Type, and apply Additional Filters to each column. To edit column settings, take the following steps:

1. In the top right corner of a column, click the **Edit** icon to open the Customize Column window.

2. In the Column Name field, customize the name of the column. The name displays at the top of the column.

3. In the Profiles drop-down menu, you can view a roll-up of all Profiles that you have access to, or select one or more specific Profiles. To update the Profiles in the column, select from one of the following options:

   • **All Profiles** - Select this option to show content from all Profiles to which you have access.

   • **Select Profiles** - Select this option to specify one or more Profiles to which you have access.

4. In the Add Profiles field, type the name of the Profiles to add to the column.

Column Profiles

5. Column type filtering opitons will vary depending on the social network selected.

If you select a Facebook Profile, then select one of the following options:

• **All** - Select this option to view all posts and comments on the selected Facebook Profiles.

   • **All Sources** - Select this option to view posts from others and from your brand.

   • **From Others** - Select this option to view posts to your brand from other users.

   • **From Brand** - Select this option to view posts posted by your brand.

• **Post** - Select this option to view all posts on the selected Facebook Profile.

   • **All Sources** - Select this option to view posts from others and from your brand.

   • **From Others** - Select this option to view posts to your brand from other users.

   • **From Brand** - Select this option to view posts posted by your brand.

- **Comment** - Select this option to view all comments on the selected Facebook Profile.

  - **All Sources** - Select this option to view posts from others and from your brand.

  - **From Others** - Select this option to view posts to your brand from other users.

  - **From Brand** - Select this option to view posts posted by your brand.

Column Type:
- ● All
  - All Sources ▾
- ○ Post
- ○ Comment

Facebook Column Type

If you select a Twitter social Profile, then select one of the following options:

- **All** - Select this option to view all posts and comments on the selected Twitter Profiles.

  - **All Sources** - Select this option to view posts from others and from your brand.

  - **From Others** - Select this option to view posts to your brand from other users.

  - **From Brand** - Select this option to view posts posted by your brand.

- **Outgoing Tweets** - Original Tweets from the Profile.

- **Outgoing Retweets** - Retweets from the Profile.

- **Mentions** - @ mentions of the Profile username.

- **Replies** - replies to or from the Profile.

  - **All Sources** - Select this option to view replies from others and from your brand.

  - **From Others** - Select this option to view replies to your brand from other users.

  - **From Brand** - Select this option to view replies posted by your brand.

Column Type:
- ● All
  - All Sources ▾
- ○ Outgoing Tweets
- ○ Outgoing Retweets
- ○ Mentions
- ○ Replies

Twitter Column Type

If you select a Google+ social Profile, then select one of the following options:

- **All** - Select this option to view all posts and comments on the selected Google+ Profiles.

  - **All Sources** - Select this option to view posts from others and from your brand.

  - **From Others** - Select this option to view posts to your brand from other users.

  - **From Brand** - Select this option to view posts posted by your brand.

- **Post** - Select this option to view all posts on the selected Google+ Profile.

- **Comment** - Select this option to view all comments on the selected Google+ Profile.

  - **All Sources** - Select this option to view comments from others and from your brand.

  - **From Others** - Select this option to view comments to your brand from other users.

  - **From Brand** - Select this option to view comments posted by your brand.

Google+ Column Options

6. In the Additional filters, segment further by Media, Status, Labels and Targeting Country/Language.

Additional Filters

Note - The options displayed depend upon the Profile media type selected.
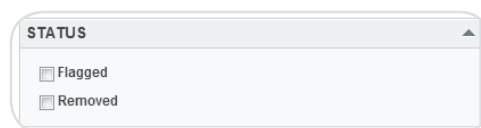
- In the Media section, you can segment by the attachments added to posts in ConversationBuddy or attachments that users are posting to the wall. Segment Media by the following options:

  - **Events** - Select this option to include posts that contain an event attachment.

  - **Links** - Select this option to include posts that contain a link or link attachment.

  - **Images** - Select this option to include posts that contain an image link or image attachment.

  - **Questions** - Select this option to include posts that contain a question attachment.

  - **Statuses** - Select this option to include posts that contain no link or media attachment.

  - **Sapplets** - Select this option to include posts that contain a sapplet attachment.

  - **Video** - Select this option to include posts that contain a video link or video attachment.
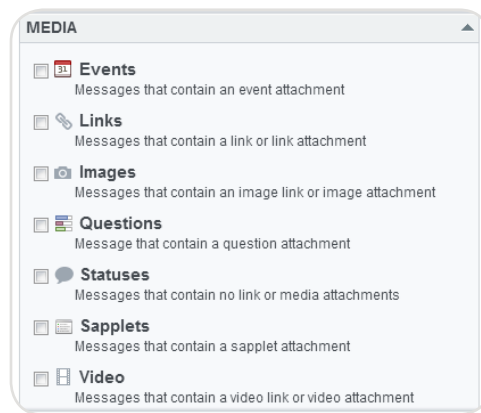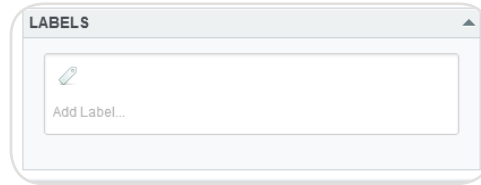

Media Filters

- In the Status section, you can segment by Flagged posts or Removed posts.

  - **Flagged** - Select this option to view posts that have been flagged for follow-up within Buddy Media.

  - **Removed** - Select this option to view posts that have been removed from a Profile from within Buddy Media.

Note - Any time a post is removed, Buddy Media keeps a record of the post.
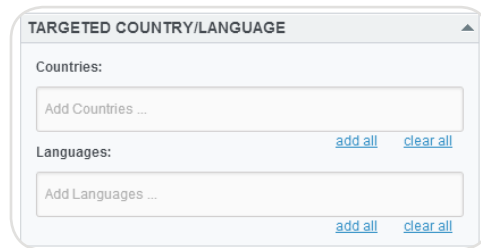

Status Filters

- In the Labels section, you can segment by specific Labels created within Buddy Media. Type the label name in the space provided and select the label from the list.

Labels

- If a Facebook Profile is selected, you can segment by Targeted Country/Language. This enables you to filter by posts that were targeted to users located in a specific country (based on their IP address) and users with custom language settings in Facebook. You can segment by the following options:

  - **Countries** - In the Add Countries field, type the name of the country you want to filter by.

  - **Languages** - In the Add Languages field, type the language you want to filter by.

Targeted Country/Language

7. At the bottom of the Customize Column window, click **Save** to apply the selected settings.

Remove a Column

To remove a column, take the following step:

1. In the top right corner of the column, click the **X** to close the column.

Navigate to Columns that are not Visible

To navigate to columns that are not visible:

1. At the bottom of the columns in ConversationBuddy, a scroll bar populates to navigate between the columns that are not visible.

Move Columns

To move columns within the current tab, or move columns to a new tab:

1. Click and drag the title bar of a column and move it left or right to change its position within the tab. Or, click and drag the title bar of a column and drag it over a tab to move it to a different tab.

Note - The tab furthest to the left will be the default tab displayed when you navigate to ConversationBuddy.

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COMPOSING AND PUBLISHING A POST IN TWITTER

Overview

You can compose and publish Tweets in ConversationBuddy to distribute to your Twitter Profiles. You can post out to one or more Twitter accounts at one time. You can also create unique Tweets by attaching photos.

Compose a Tweet

To compose a tweet in ConversationBuddy, take the following steps:

1. Log in to Buddy Media. From the top navigation bar, select **ConversationBuddy**.

2. In the top right corner, click the **Compose** button to open the Compose Message window.

Compose

3. In the Add Profiles or Distribution Lists field, type the name of a Profile or Distribution List. Select one or more Twitter Profiles and/or Distribution Lists from the drop-down menu.

Add Profiles or Distribution Lists...

Add Profiles or Distribution Lists

Note - A Twitter Distribution List enables you to send Tweets to a selected group of Twitter accounts at one time. You can create Distribution Lists in the Tools section of ConversationBuddy. You can only apply one Distribution List per tweet and applying it will override all previous Profile selections.

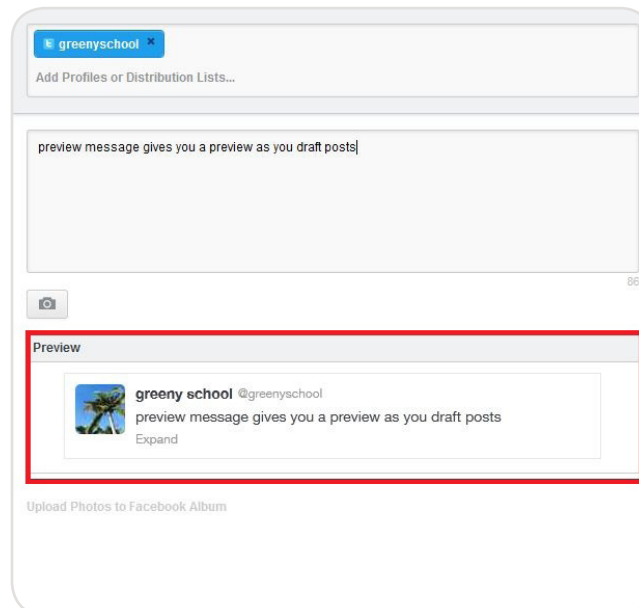4. If you add a Distribution List, a warning screen will populate. Click **Yes** to continue.
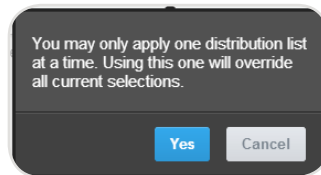
Distribution List Warning Screen

5. In the Enter a Message field, enter desired text.

Enter your Message

- The Preview field will display what your draft post will look like prior to publishing.

Preview Draft Posts

Note - The Compose Message box has a character count for Twitter starting at 140 characters, and counts down as characters are typed into the Enter a Message field.

Add Attachments

You can add one type of attachment to Tweets in ConversationBuddy:

- **Image** - You can attach a photo from your computer to Tweets composed in ConversationBuddy.
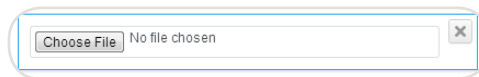

Add Attachment

Attach an Image to a Twitter Post

To attach an image to a post, take the following steps:

1. Below the Enter a Message field, click the **Image** icon.

2. Click **Choose File** and select an image from your computer.

Attach an Image

Note - The image will display below the Enter a Message field and it will display in the post as a shortened URL.

Add a Label to a Post

You can add one or more Labels to Tweets to help sort and track posts in the columns in ConversationBuddy. To add a Label to a post, take the following steps:

1. In the Compose Message window, in the Add Label field, type a Label name.
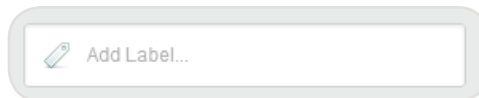
Add Label

2. In the drop-down menu select a pre-existing Label. Or, create a new Label by typing the full Label name in the Add Label field and click **Create New** to the right of the new Label name.

Publishing a Twitter Post

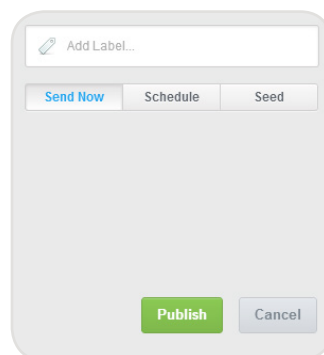You can choose one of three publishing options for Twitter posts:

- **Send Now** - You can click Send Now to publish a post live on the selected Twitter Profiles.

- **Schedule** - You can click Schedule to select a future date and time to publish the post on the selected Twitter Profiles.

- **Seed** - You can click Seed to suggest content to other Profile owners for approval before it is published on the selected social media Profiles.

Send Now

To publish a post as Send Now, take the following steps:

1. In the Compose Message window, click **Send Now**.

2. Click **Publish**.

Note - The post will be published immediately on the selected social media Profiles. It will display in the Outbox column of ConversationBuddy.

Send Now

Schedule

To Schedule a post, take the following steps:

1. In the Compose Message window, click **Schedule**.

2. In the Calendar, select a date to schedule the post.

3. In the Time of Day drop-down menus, select a time of day to schedule the post.

4. Click **Schedule**.

Note - The post will display in the Outbox column of ConversationBuddy. From the Outbox you can edit the post content and the scheduled date and time.

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Schedule a Post

Seed

Clients with multiple Twitter Profiles enabled within ConversationBuddy can Seed or suggest Tweets out to the Profile owners. The Profile owners can approve the suggested Tweet and publish it on their individual Twitter Profiles. To Seed a post, take the following steps:

1. In the Compose Message window, click **Seed**.

2. Check the **Lock Message Content and Targeting** box. This prevents users from editing the post content, adding and removing Walls, countries or languages (optional).

3. Check the **Choose a Date** box. This enables you to Set a Specific Date and time to publish the post, or to Set a Window of time to publish the post.

   • Click **Set Specific Date** to select a specific date and time to publish the post. When a Profile owner approves the post, the post is published at the specified date and time. In the Date field, select a date to publish the post. In the Time of Day drop-down menus, select a time of day to publish the post.

Set Specific Date

- Click **Set Window** to select a window of time to publish the post. When the Profile owner approves the post, they can select a date and time from within the parameters of the window of time to publish. In the Earliest Publish Date section, select the earliest date and time. In the Latest Publish Date section, select the latest date and time to publish the post.

Set Window

4. Click **Seed**.

Note - The post will display in the Outbox column of ConversationBuddy. From the Outbox you can edit the post content and the selected date and time.

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COMPOSING AND PUBLISHING A FACEBOOK POST

Overview

You can compose a Facebook post in ConversationBuddy to distribute to your social Profiles. You can use ConversationBuddy to post out to one or more social media Profiles within the same network. You can create unique posts by attaching links or photos. You can also upload photos to a Facebook album from ConversationBuddy.
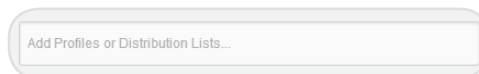
Post to Facebook

To compose a Facebook post in ConversationBuddy, take the following steps:

1. Log in to Buddy Media. From the top navigation bar, select **ConversationBuddy**.

2. At the top right of the ConversationBuddy screen, click the **Compose** button to open the Compose Message window.

Compose

3. In the Add Profiles or Distribution Lists field, type the name of a Profile or Distribution List. Select one or more Facebook Profiles and/or Distribution Lists from the drop-down menu.
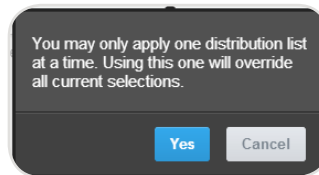
Add Profiles or Distribution Lists...

Add Profiles or Distribution Lists

Note - A Distribution List enables you to post to multiple Profiles within one social network. You can also post out to a list of users based on their Facebook location and/or language settings. Location is based on a Facebook user's IP address. Language is based on a Facebook user's default language setting or the language the user selects when they first register for Facebook. Create a Distribution List in the Tools section of ConversationBuddy.

4. If you add a Distribution List, a warning screen will populate. Click **Yes** to continue.


Distribution List Warning Screen

- Below the Add Profiles or Distribution Lists field, click **Edit** to update the location, language settings or feed targets of a Distribution List or Profile.

  - In the **Add Countries** field, type the name of new countries to add to the list. Or, click the X at the right of a country to remove it from the list.

  - Click the **Everywhere** radio button to post the Facebook post to all areas within the selected locations.

  - Click the **By State/Province** radio button to filter the selected locations by state or province. In the **Add States** field, type the name of the States or Provinces by which to filter.

  - Click the **By City** radio button to filter the selected locations by city. In the **Add Cities** field, type the name of the cities by which to filter.
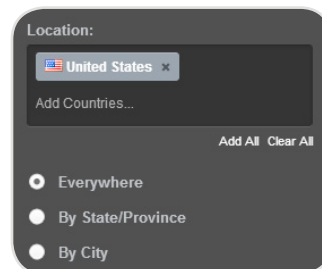

Filter by Location

- In the **Add Languages** field, type the name of the languages to add to the list. Or, click the **X** at the right of a language to remove it from the list.
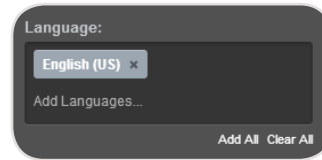
Filter by Language

- To the right of **Feed Targeting**, click **+Add Target** to display a drop-down menu of targeting options. Feed Targeting enables you to target a post to the News Feed of specific Facebook users based on demographics including: Age, Gender, Relationship Status, Interested In, Education Status, Workplace, College and College Major. If Feed Targeting is added to a post, the post will be visible to all fans on the Page's Timeline, however, the post will only display on the News Feeds of the users who meet the criteria selected in the Feed Targeting.
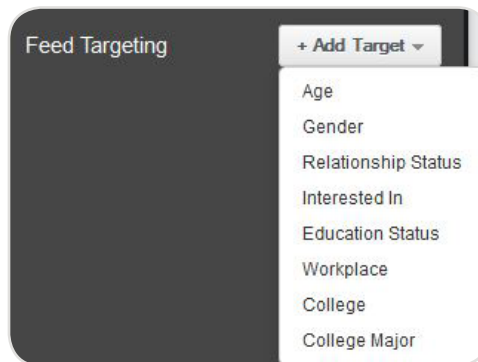
Feed Targeting Options

- Select **Age** to target a post to users within a minimum and maximum age range.

- Select **Gender** to target a post to users who have specified their gender. In the Gender drop-down menu, select Male or Female.

- Select **Relationship Status** to target a post to users with specific relationship statuses. Below Relationship Status, check one or more boxes to target specific relationship statuses: Single, In Relationship, Married or Engaged.

- Select **Interested** In to target a post to users who have specified who they are interested in. In the Interested In drop-down menu, select Male or Female.

- Select **Education Status** to target a post to users who have specified their level of education. In the Education Status drop-down menu, select High School, Undergraduate or Alumni.

- Select **Workplace** to target a post to users who have specified their employer. In the Add Work Network field, type the name of a company. A list of companies available on Facebook will display. You can select from the list and target a post to one or more companies.

- Select **College** to target a post to users who have specified their college. In the Add College field, type the name of a college. A list of colleges available on Facebook will display. You can select from the list and target a post to one or more colleges.

- Select **College Major** to target a post to users who have specified their college major. In the Add College Major field, type the name of a college major. A list of college majors available on Facebook will display. You can select from the list and target a post to one or more college majors.

4. In the Enter a Message field, type a post.

Enter a Message

- The Preview field will display what your draft post will look like prior to publishing.

Preview Draft Posts

Add Attachments

There are three types of attachments that you can add to Facebook posts in ConversationBuddy:

- **URL** - You can attach a URL from any website (For example: Blog, Mainstream News, Twitter, YouTube, etc.) to a Facebook post. Or, you can link to one of your Facebook tabs created in ProfileBuddy.

- **Image** - You can attach a photo from your computer to posts in social media networks.

- **Question** - You can add a Question on a Facebook Page to create an interactive poll for fans of the Facebook Page.

Add Attachments

Attach a Link to a Facebook Post

To attach a Link to a Facebook post, take the following steps:

1. Below the Enter a Message field, click the Link icon. There are two types of Links you can attach to a Facebook post:

   - **Link to a URL** - Select this option to attach a URL from any website.

   - **Link to one of your Facebook tabs** - Select this option to link to one of your Facebook tabs created in ProfileBuddy.

2. If you click Link to a URL, in the Enter a URL field, insert the desired URL.

3. Click **OK**.

Note - Buddy Media will link to the URL, pulling in all aspects of the website.

Link to a URL

To customize the URL, take the following steps:

- To customize the title, click on the title and type a new one into the field. Press **Enter** to save the new title.

- To customize the URL, click on the URL and type a new URL into the field. Press **Enter** to save the new URL.

- To customize the description, click on the description and type a new one into the field. Press **Enter** to save the new description.

- To customize the thumbnail, click **Upload a Thumbnail**. Click **Choose File** and select an image from your computer.

Update the Link

4. If you click Link to one of your Facebook tabs, in the drop-down menu, select the desired Facebook tab.

Note - The Facebook tabs in the drop-down menu are the tabs available for the selected Facebook Profile.
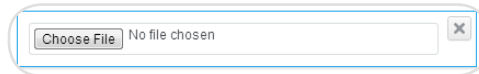
5. Click **OK**.
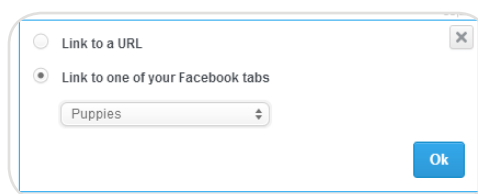
Link to Facebook tabs

Attach an Image to a Facebook Post

To attach an image to a Facebook post, take the following steps:

1. Below the Enter a Message field, click the **Image** icon.

2. Click **Choose File** and select an image from your computer.

| Choose File | No file chosen | ✕ |

Attach an Image

Note - The image will display below the Enter a Message field and it will display in the Wall Photo Album, or, if that does not exist, it will display in the My Photos Album on Facebook. The text in the Enter a Message field will display with the image.

Upload Photos to a Facebook Album

You can upload one or more photos to a Facebook album from ConversationBuddy. You can add photos to an existing album or create a new album. To upload photos to a Facebook album, take the following steps:

1. In the Compose Message window, below the attachment icons, click **Upload Photos to a Facebook Album**. The Enter a Message field changes to +Add Photo.

2. In the Select an Album drop-down menu, select an existing album, or click **+New Album** to create a new album.

    - If you select +New Album, the Add Album window will display.

    - In the Album Name field, type a name for the new album (optional).

    - In the Album Description field, type a description for the album (optional).

3. Click **OK**.

Add Album

4. Click **+Add Photo** and select one or multiple photos from your computer.

5. In the Add a Description field, type a description for each photo (optional).

6. At the right of the Add a Description field, click the **X** to remove a photo (optional).

7. At the bottom of the Compose Message window, click **+Add Photo** to add additional photos.
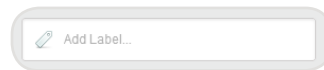

Upload Photos to a Facebook Album

Add a Label to a Post

You can add a Label to a post to easily sort and track it in ConversationBuddy columns. To add a Label to a post, take the following steps:

1. In the Compose Message window, in the Add Label field, type a Label name.

Add Label

2. In the drop-down menu, select a pre-existing Label. Or, create a new Label by typing the full Label name in the Add Label field and click Create New to the right of a new Label name.

Publishing a Facebook Post

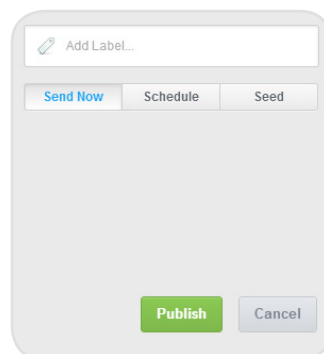You can choose one of three publishing options for Facebook posts:

- **Send Now** - You can click Send Now to publish a post live on the selected social media profiles.
- **Schedule** - You can click Schedule to select a future date and time to publish the post on the selected social media profiles.
- **Seed** - You can click Seed to suggest content to other profile owners for approval before it is published.

Send Now

To publish a post as Send Now, take the following steps:

1. In the Compose Message window, click **Send Now**.

2. Click **Publish**.

Note - The post will be published immediately on the selected social media Profiles. It will display in the Outbox column of ConversationBuddy.

Send Now

Schedule

To Schedule a post, take the following steps:

1. In the Compose Message window, click **Schedule**.

2. In the Calendar, select a date to schedule the post.

3. In the Time of Day drop-down menus, select a time of day to schedule the post.

4. Click **Schedule**.

Note - The post will display in the Outbox column of ConversationBuddy. From the Outbox you can edit the post content and the scheduled date and time.

Schedule a Post

Seed

Clients with multiple Facebook Profiles enabled within ConversationBuddy can Seed or suggest posts out to the Profile owners. The Profile owners can approve the suggested post and publish on their individual Facebook Profiles. To Seed a post, take the following steps:

1. In the Compose Message window, click **Seed**.

2. Check the **Lock Message Content and Targeting** box (optional). This prevents users from editing the post content, adding and removing Walls, countries or languages.

3. Check **Choose a Date** box. This enables you to Set a Specific Date and time to publish the post, or to Set a Window of time to publish the post.

   • Click **Set Specific Date** to select a specific date and time to publish the post. When a Profile owner approves the post, it is published at the specified date and time. In the Date field, select a date to publish the post. In the Time of Day drop-down menus, select a time of day to publish the post.

Set Specific Date

   • Click **Set Window** to select a window of time to publish the post. When the Profile owner approves the post, they can select a date and time from within the parameters of the window of time to publish it. In the Earliest Publish Date section, select the earliest date and time to publish the post. In the Latest Publish Date section, select the latest date and time to publish the post.


Set Window

4. Click **Seed**.

Note - The post will display in the Outbox column of ConversationBuddy. From the Outbox you can edit the post content and the selected date and time.

Facebook Replies

Facebook Replies are an effective way to respond to people without @mentioning them. When enabled you will see threaded replies in your ConversationBuddy column enabling you to interact with your customers and fans. In ConversationBuddy replies are added displaying a special reply icon, so you can differentate replies from other posts and comments.
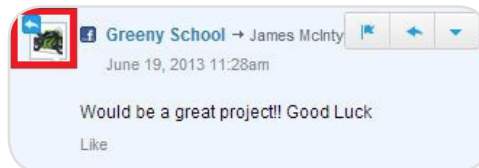
Reply Icon

When you view a reply, the parent comment and parent post will display.
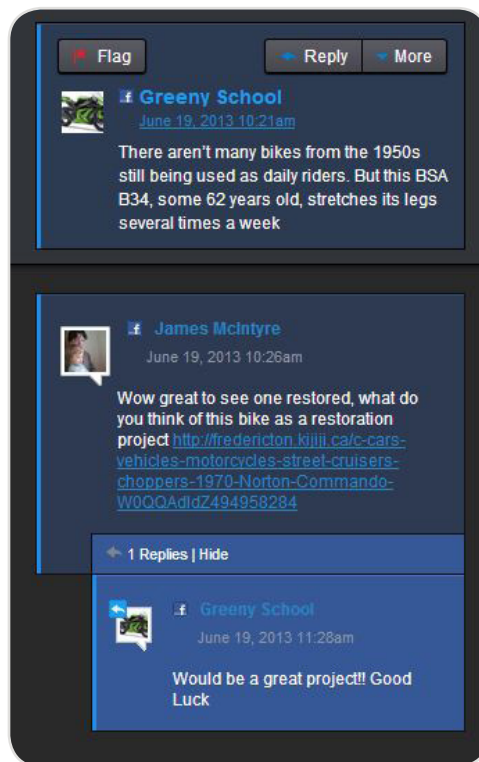
Parent Post and Comment

Reply to Comments or Replies

To reply to a comment or reply, complete the following steps:

1. Select the desired comment or reply to which you wish to reply.

2. Click the respond icon. A window will display that provides details on the account you are replying from, and displays any related posts or comments.

Respond Icon

Note - If you choose to reply on a reply, the original comment will display as well.

3. Insert the desired reply and click **Publish**.
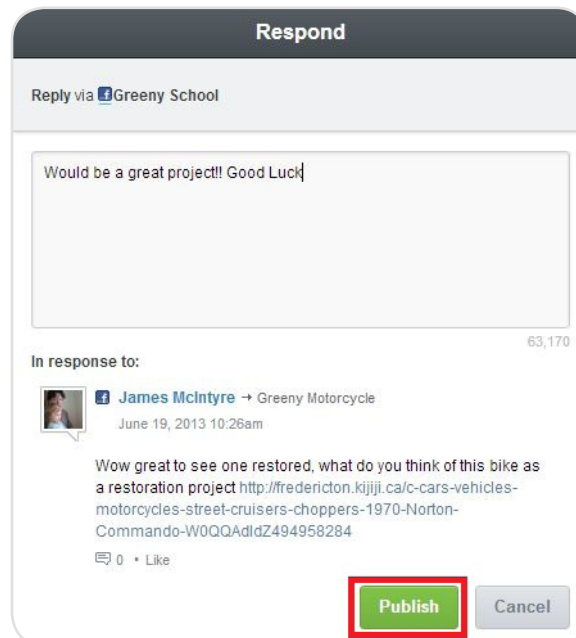
Publish

Have questions? Contact us:

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🅣 @marketingcloud   🅣 1-888-672-3426

COMPOSING AND PUBLISHING A GOOGLE+ POST

Overview

You can compose a Google+ post in ConversationBuddy to distribute to your social Profiles. Post out to one or more social media Profiles within the same network. You can create unique posts by attaching links and photos.

Post to Google+

To compose a Google+ post in ConversationBuddy, take the following steps:

1. Log in to Buddy Media. From the top navigation bar, select **ConversationBuddy**.

2. At the top right corner, click the **Compose** button to open the Compose Message window.


Compose

3. In the Add Profiles or Distribution Lists field, type the name of a Profile or Distribution List. Select one or more Profiles and/or Distribution Lists from the drop-down menu.

Add Profiles or Distribution Lists...

Add Profiles or Distribution Lists

Note - A Google+ Distribution List enables you to send posts to a selected group of Google+ accounts at one time. You can create Distribution Lists in the Tools section of ConversationBuddy. You can only apply one Distribution List per Google+ post and applying it will override all previous Profile selections.

4. If you add a Distribution List, a warning screen will populate. Click **Yes** to continue.
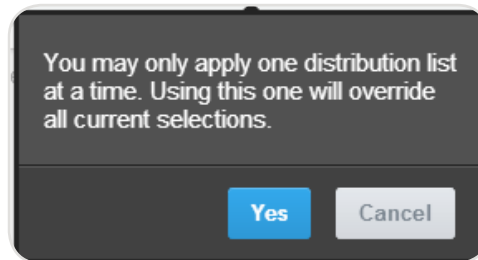
Distribution List Warning Screen

5. In the Enter a Message field, type a post.
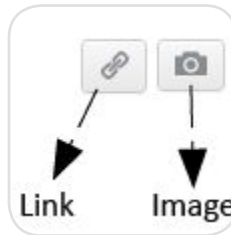

Enter a Message

- The Preview field will display what your draft post will look like prior to publishing.

Preview Draft Posts

Add Attachments

There are two types of attachments that you can add to a Google+ post in ConversationBuddy:

- **Link** - You can attach a Link from any website (For example: Blog, Mainstream News, Twitter, YouTube, etc.) to a Google+ post.

- **Image** - You can attach a photo from your computer to posts in social media networks.

Add Attachments
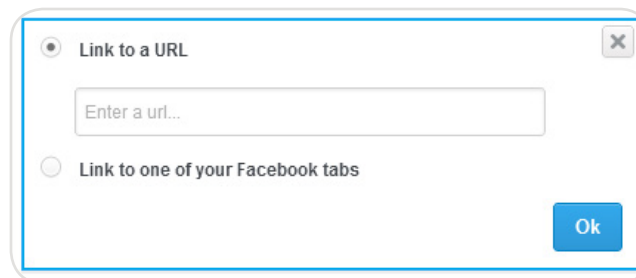
Attach a Link to a Google+ Post

To Link a URL to a Google+ post, take the following steps:

1. Below the Enter a Message field, click the **Link** icon.

Note - You can not link to a Facebook Tab from a Google+ post.

2. Click **Link to a URL**. In the Enter a URL field, type a URL.

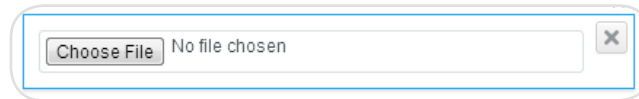*Note - Buddy Media will link to the website, pulling in all aspects of it.*

Link to a URL

3. Click **OK**.

Attach an Image to a Google+ Post

To attach an image to a post, take the following steps:

1. Below the Enter a Message field, click the **Image** icon.

2. Click **Choose File** and select an image from your computer.

Attach an Image

Add a Label to a Google+ Post

You can add a Label to a post to easily sort and track items in the columns in ConversationBuddy. To add a Label to a post, take the following steps:

1. In the Compose Message window, in the Add Label field, type a Label name.
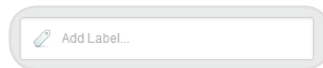
Add Label

2. In the drop-down menu, select a pre-existing Label. Or, create a new Label by typing the full Label name in the Add Label field and click **Create New** to the right of a new Label name.

Publishing a Google+ Post

You can choose one of three publishing options for Google+ posts: Send Now, Schedule or Seed.

- **Send Now** - You can click Send Now to publish a post live on the selected social media Profiles.

- **Schedule** - You can click Schedule to select a future date and time to publish the post on the selected social media Profiles.

- **Seed** - You can click Seed to suggest content to other Profile owners for approval before it is published on the selected social media Profiles.

Send Now

To publish a post as Send Now, take the following steps:

1. In the Compose Message window, click **Send Now.**

2. Click **Submit** to publish the post.

Note - The post will be published immediately on the selected social media Profiles. It will display in the Outbox column of ConversationBuddy.

Send Now

Schedule

To Schedule a post, take the following steps:

1. In the Compose Message window, click **Schedule**.

2. In the Calendar, select a date to schedule the post.

3. In the Time of Day drop-down menus, select a time of day to schedule the post.

4. Click **Schedule**.

Note - The post will display in the Outbox column of ConversationBuddy. From the Outbox you can edit the post content and the scheduled date and time.

Schedule a Post

Seed

Clients with multiple Google+ Profiles enabled within ConversationBuddy can Seed or suggest posts out to the Profile owners. The Profile owners can approve the suggested post and set it live on their individual Google+ Profiles. To Seed a post, take the following steps:

1. In the Compose Message window, click **Seed**.

2. Check the **Lock Message Content and Targeting** box. This prevents users from editing the post content, adding and removing Walls, countries or languages (optional).

3. Check the **Choose a Date** box. This enables you to Set a Specific Date and time to publish the post, or to Set a Window of time to publish the post.

- Click **Set Specific Date** to select a specific date and time to publish the post. When a Profile owner approves the post, it is published at the specified date and time. In the Date field, select a date to publish the post. In the Time of Day drop-down menus, select a time of day to publish the post.

Set Specific Date

- Click **Set Window** to select a window of time to publish the post. When the Profile owner approves the post, they can select a date and time from within the parameters of the window of time to publish it. In the Earliest Publish Date section, select the earliest date and time to publish the post. In the Latest Publish Date section, select the latest date and time to publish the post.

Set Window

4. Click **Seed**.

Note - The post will display in the Outbox column of ConversationBuddy. From the Outbox you can edit the post content and the selected date and time.

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COMPOSING AND PUBLISHING A STATUS UPDATE TO LINKEDIN

Overview

You can compose and publish status updates to a LinkedIn company page through ConversationBuddy. This enables you to post out to one or more LinkedIn pages at one time. You can also add attachments to create unique status updates to publish to your LinkedIn pages.

Compose a LinkedIn Status Update

To Compose a LinkedIn status update in ConversationBuddy, take the following steps:

1. Log in to Buddy Media. From the top navigation bar, select **ConversationBuddy**.

2. In the top right corner, click the **Compose** button to open the Compose Message window.

Compose

3. In the Add Profiles or Distribution Lists field, type the name of a LinkedIn page or Distribution List. This will populate a list of Profiles and Distribution Lists to which you have access.

Add Profiles or Distribution Lists...

Add Profiles or Distribution Lists

Note - A LinkedIn Distribution List enables you to post status updates to a selected group of LinkedIn pages at one time. You can create Distribution Lists in the Tools section of ConversationBuddy. You can only apply one Distribution List per status update and applying it will override all previous Profile selections.

- If you add a Distribution List, a warning screen will populate. Click **Yes** to continue.
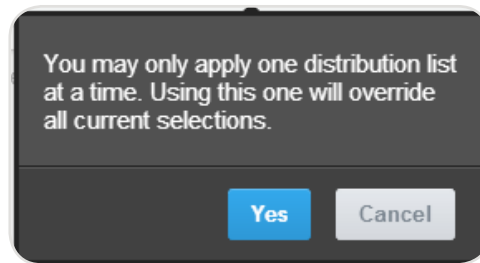
You may only apply one distribution list at a time. Using this one will override all current selections.

Yes   Cancel

Distribution List Warning Screen

4. In the Enter a Message field, type a post.

Enter a Message

- The Preview field will display what your draft post will look like prior to publishing.
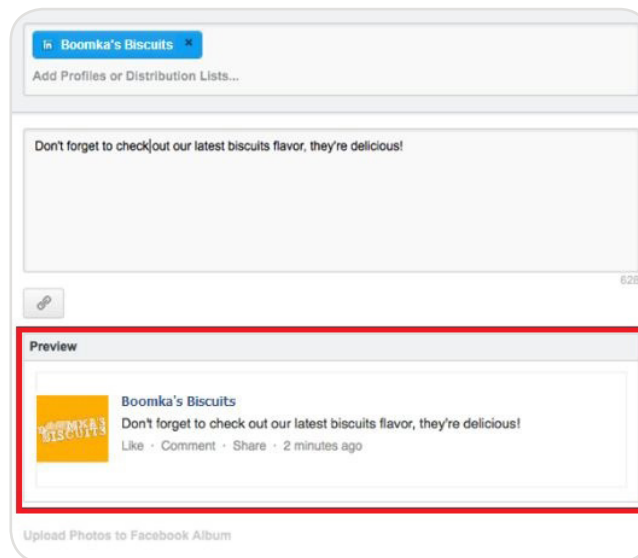
Preview Draft Posts

Attach a Link to a LinkedIn Status Update

There is one attachment that you can add to LinkedIn status updates in ConversationBuddy:

- **Link** - You can attach a Link from any website (For example: Blog, Mainstream News, Twitter, YouTube, etc.) to a LinkedIn status update.

To Link a URL to a LinkedIn status update, take the following steps:

1. Below the Enter a Message field, click the **Link** icon.

Note - You can not link to a Facebook Tab from a LinkedIn status update.

2. Click **Link to a URL**. In the Enter a URL field, insert the desired URL.

Note - Buddy Media will link to the website, pulling in all aspects of the it.

Link to a URL

3. You can customize the title, URL, description and thumbnail of the URL before posting it on LinkedIn (optional). To customize the URL, take the following steps:

- To customize the title, click on the title and type a new one into the field. Press **Enter** to save the new title.

- To customize the URL, click on the URL and type a new URL into the field. Press **Enter** to save the new URL.

- To customize the description, click on the description and type a new one into the field. Press **Enter** to save the new description.

- To customize the thumbnail, click **Upload a Thumbnail**. Click **Choose File** and select an image from your computer.

4. Click **OK**.

Publishing a LinkedIn Status Update

You can choose one of three publishing options for LinkedIn status updates: Send Now, Schedule or Seed.

- **Send Now** - You can click Send Now to publish a status update live on the selected social media Profiles.

- **Schedule** - You can click Schedule to select a future date and time to publish the status update on the selected social media Profiles.

- **Seed** - You can click Seed to suggest content to other Profile owners for approval before it is published on the selected social media Profiles.

Send Now

To publish a post as Send Now, take the following steps:

1. In the Compose Message window, click **Send Now**.

2. Click **Publish** to publish the status update.

Note - The status update will be published immediately on the selected social media Profiles. It will display in the Outbox column of ConversationBuddy.
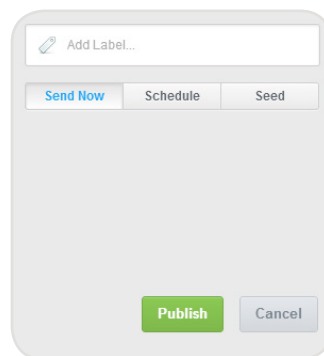
Send Now

Schedule

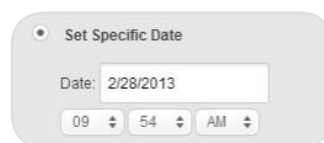To Schedule a post, take the following steps:

1. In the Compose Message window, click **Schedule**.

2. In the Calendar, select a date to schedule the status update.

3. In the Time of Day drop-down menus, select a time of day to schedule the status update.

4. Click **Schedule**.

Note - The status update will display in the Outbox column of ConversationBuddy. From the Outbox you can edit the post content and the scheduled date and time.

Seed

Clients with multiple LinkedIn accounts enabled within ConversationBuddy can Seed or suggest status updates out to the account owners. The account owners can approve the suggested status update and set it live on their individual LinkedIn account. To Seed a post, take the following steps:

1. In the Compose Message window, click **Seed**.

2. Check the **Lock Message Content and Targeting** box. This prevents users from editing the post content, adding and removing Walls, countries or languages (optional).

3. Check the **Choose a Date** box. This enables you to Set a Specific Date and time to publish the post, or to Set a Window of time to publish the post.

   • Click **Set Specific Date** to select a specific date and time to publish the post. When a Profile owner approves the post, the post is published at the specified date and time. In the Date field, select a date to publish the post. In the Time of Day drop-down menus, select a time of day to publish the post.

Set Specific Date

- Click **Set Window** to select a window of time to publish the post. When the Profile owner approves the post, they can select a date and time from within the parameters of the window of time to publish the post. In the Earliest Publish Date section, select the earliest date and time to publish the post. In the Latest Publish Date section, select the latest date and time to publish the post.

Set Window

4. Click **Seed**.

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# USING RULES, FLAGS, LABELS, DISTRIBUTION LISTS AND THE OUTBOX

Rules Overview

A Rule automates actions on specific posts coming into or out of your social Profile(s). Rules use a list of trigger words and/or phrases which filter through new posts. You can set up automatic notification emails when Rules are triggered to ensure posts are segmented and addressed quickly. When you view posts in a column in ConversationBuddy, the trigger words and/or phrases highlighted in red indicate conditions matching a Rule.
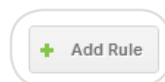
Add a New Rule

To add a new Rule, take the following steps:

1. Log in to Buddy Media. From the top navigation bar, select **ConversationBuddy**.

2. From the ConversationBuddy navigation bar, select the **Tools** icon. The Rules area displays.
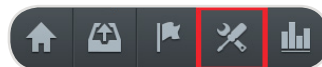
Tools

3. At the far right, click **Add Rule**.

Add Rule

4. At the top of the new Rule screen, click the title. Insert new title text. Click anywhere outside of the title to save.

Note - Clicking Save at this point will result in the error message: There was a problem with your submission. Must have one or more Profile(s).

Update Title of Rule

5. In the Profiles section, click **Add Profiles**. Type the name of a Profile to populate a list of available Profiles.

6. From the list, select a Profile. You can repeat step 5 to add multiple Profiles.

Note - Profiles can be selected from the same or different social networks.

7. Below Add Profiles, select the Message Source for the Rule. A Message Source defines the type of post to which the Rule will apply.

    - **Incoming** - You can select Incoming to filter posts created by users who are posting to your Profile.

    - **Outgoing** - You can select Outgoing to filter posts your brand creates for the selected Profile.

    - **Both** - You can select Both to filter all Incoming and Outgoing posts for the selected Profile.

Add Profiles and Message Source

8. In the Conditions section, type the trigger words and/or phrases in the Add a Keyword field. The post must contain these trigger words and/or phrases for the Rule to activate.

9. After each trigger word and/or phrase, press **Enter** to accept the condition.

Note - There is no limit to the number of conditions. However, the same word or phrase can only be entered once.

10. To use the Wildcard Filter, add an Asterisk (*) at the end of any word and check the **Use Wildcard Filter** box. When the Wildcard Filter is enabled, any extension of that word will trigger the Rule. For example, entering s* will filter any word that begins with s (shoot, snap, ship, etc.).

Conditions

11. In the Actions section, under Apply the following actions, select one of the three options:

- **None** - No moderation. No action will be taken on the post.

- **Auto-Flag the message** - Flags the post for review in Buddy Media. This will place the post in the Flagged section of ConversationBuddy.

- **Auto-delete messages** - Immediately removes the post from your Profile (only applies to Facebook and Google+ posts).

Note - All posts that are deleted will still be available for review in the Home section of ConversationBuddy. To view, Filter by Status - Removed. However, you can not undo a deleted Facebook post. Once a post is deleted from your Facebook Page, it can not be added back onto the Page.

12. From the Optional Actions section, select one of the following two options:

- Check the Apply Labels box to populate the Add Label section. Type the name of a Label in the Add Label field. You can select a Label from the list or add a new Label by selecting the Create New option in the drop-down.

- Check the Notify Users box to populate the Notify Users section. In the Add Users field, type the name(s) of the users to notify. An email will be sent to the address associated with their Buddy Media account. You can set up email notifications even if you do not opt to Flag posts.

  - Select **Aggregate Notifications** to send email notifications twice daily that contain a report of the posts that meet the above conditions.

  - Select **Send Immediately** to send email notifications immediately that contain a report of the posts that meet the above conditions.

Actions

13. Click **Save** to activate the Rule.
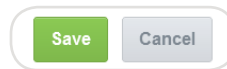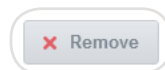
Save a Rule

Edit or Delete a Rule

To edit or delete a Rule, take the following steps:

1. On the Tools page, at the far right of the Rule you want to edit, click the gear icon. The Rule configuration screen displays.

Edit a Rule

2. Modify the desired options.

3. At the far right of the screen, click **Remove** to delete a Rule.

4. A warning message displays, confirming: Are you sure you want to delete? Click **OK** to continue.

Remove a Rule

Example Use Case for Rules:

- Identify and respond to questions coming to your brand, such as 'when will your new product be released?' and 'where can I purchase this?' by using triggers such as 'when,' 'where' and 'how.'

- Define and respond to posts noting product or service issues by using triggers such as 'broken' or 'problem.'

- Identify competitor mentions.

- Identify and thank/reward brand advocates by using triggers such as 'great,' 'love,' 'awesome,' and 'fantastic.'

Flags Overview

The ConversationBuddy Flagged section displays all posts that have been Flagged and are awaiting review. Flags can be applied to a post automatically using a Rule or posts can be manually Flagged by a user. Flagged posts display in the column with a red line on the left side of the box.
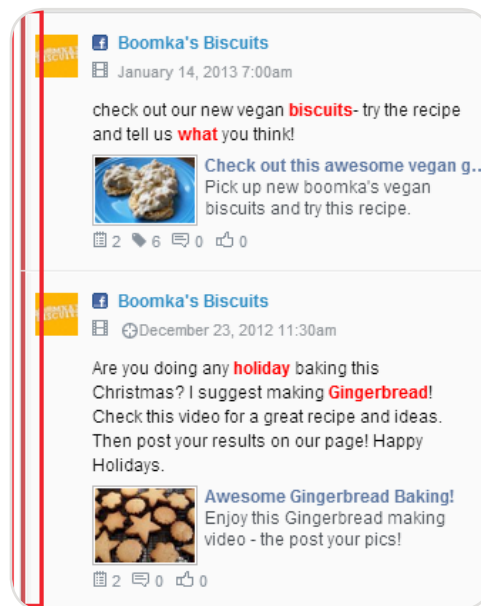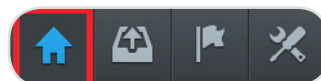

Flagged Posts

Manually Flag a Post

To manually Flag a post, take the following steps:

1. From the ConversationBuddy navigation bar, click the **Home** icon to navigate to the Home section of ConversationBuddy.

Home

2. In the top right hand corner of the desired post, select the **Flag** icon.


Flag a Post

3. In the Notes for Flagged item box, you can select from the following two options:

- **Notify Users** - In the Notify Users field, type the name(s) of the users to notify. An email will be sent to the email address associated with their Buddy Media account.

- **Add a Note** - In the Add a Note field, type the desired text to send to the user.

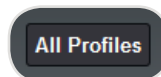4. Click **OK** to add a Flag.

Manage Flagged Posts

To take actions on Flagged posts, take the following steps:

1. In the ConversationBuddy navigation bar, click the **Flag** icon to navigate to the Flagged section of ConversationBuddy.
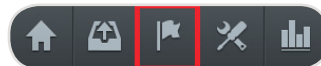
Flagged

2. To filter the Clients and Profiles displayed, click **All Profiles** to open the Client and Profiles window.
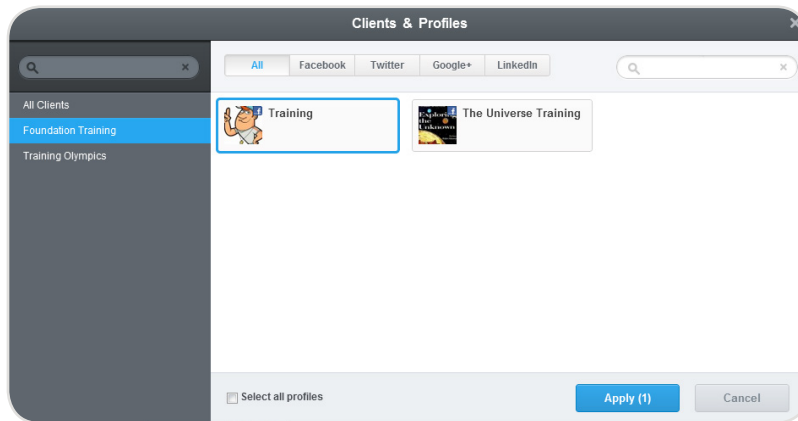

All Profiles

3. In the Client and Profiles window, on the left side bar, select a client name. Only the Profiles for the selected client will display. Or, across the top of the Client and Profiles window, use the social network Navigation Bar to display only Profiles from the selected social network.

4. Select the desired Profiles. A blue border will display around each.

Note - To select all Profiles, at the bottom, check Select all Profiles.
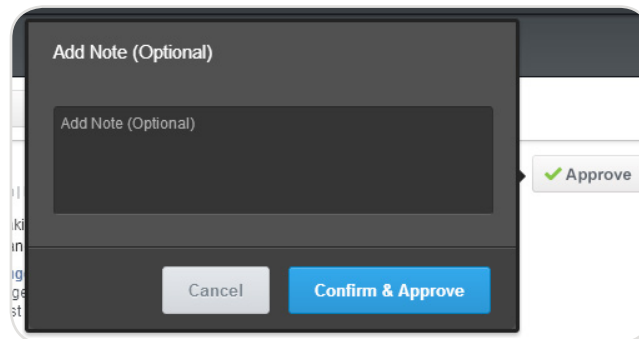
5. Click **Apply**.

Client and Profile Selector Window

Approve Posts in the Flagged Section

To approve one or more posts in the Flagged Section, take the following steps:

1. At the far right of a post, click **Approve** to open the Add Note window.

2. In the Add Note field, type the desired text (optional).

3. Click **Confirm & Approve** to continue. This action removes the post from the list of Flagged posts.

Add Note

Remove Posts in the Flagged Section

To remove one or more posts in the Flagged Section, take the following steps:

1. At the far right of a post, click **Remove** to open the Add Note window.

2. In the Add Note field, type the desired text (optional).

3. Click **Confirm & Remove** and the post is removed from the Flagged section, as well as the live social network in which it displays.

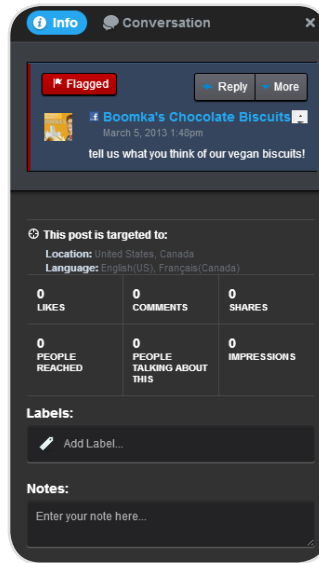*Note - You can only remove posts from Facebook and Google+, you can not delete Tweets from other users.*
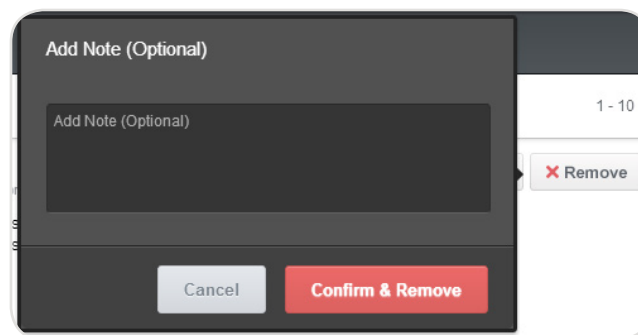
Remove Posts in the Flagged Section

Add a Note to a Flagged Post

To add a note to a Flagged post, take the following steps:

1. Click on a post to open the Inspector Panel.

2. At the bottom of the Inspector Panel, type a note in the Enter your note here field.

3. Press **Enter**.

Inspector Panel

Labels Overview

A Label is an organizational tool within ConversationBuddy to track the posts you create and/or receive through your Profiles. You can apply a Label when you compose a post, automatically apply one using a Rule, or apply one to a post within the Inspector Panel. Labels can simplify navigation because every Labeled post can be segmented out to an individual column.

Apply a Label to a Post in the Inspector Panel

To apply Labels to posts in the Inspector Panel, take the following steps:
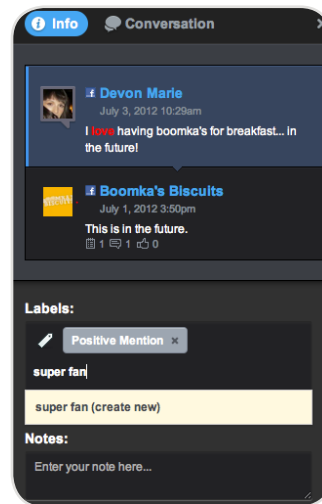
1. In the ConversationBuddy navigation bar, click the **Home** icon to navigate to the Home section.

Home

2. In a column, click on a post to open the Inspector Panel.

3. In the Add Label field, type a Label. You can select a pre-existing Label from the list or add a new Label by selecting the (create new) option in the drop-down.

Note - The Label icon will display under that post and the number next to the Label will adjust to reflect the new Label.
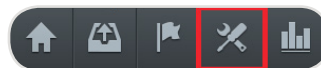
Label Management

Change the Name of a Label

To change the name of a Label, take the following steps:

1. From the ConversationBuddy navigation bar, select the **Tools** icon to navigate to the Tools section. The Rules area displays.

Tools

2. On the left rail, click **Labels**.

3. From the list of Labels, click the Label name.

4. Type a new name into the Name field.

5. Click **Enter**.

Note - If you update a label, this does not update the previous posts.

Delete a Label

To delete a Label, take the following steps:

1. At the far right of the Label, click the **X** to remove the Label from ConversationBuddy.

Note - This will remove the Label from all posts it is associated with.

Example Use Case for Labels:

- Define specific types of content, such as questions or polls.

- Outline specific types of promotional messages, such as 'percentage off' or 'free shipping.'

- Highlight specific campaigns, such as 'Olympics' or 'film festival.'

- Sort by specific target audiences.

Distribution Lists Overview

A Distribution List is an organizational tool within ConversationBuddy that enables you to post to multiple Profiles within one social media network. You can create Distribution Lists for Twitter, Facebook, Google+ and Linkedin accounts, however, you can only include accounts from the same social media network within a Distribution List.
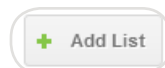
Create a Distribution List

To create a Distribution List, take the following steps:

1. From the ConversationBuddy navigation bar, select the Tools icon to navigate to the Tools section.
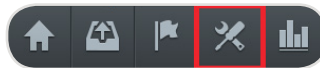
Tools

2. On the left side bar, select **Distribution Lists**.

3. At the far right, click **+Add List** to create a new Distribution List.

Add List

4. At the top of the Distribution Lists screen, click the title. Type a new title. Click anywhere outside of the title to save.

5. In the Apply to the following Profiles section, click **Add Profiles**. Type the name of a Profile to populate a list of available Profiles.

6. From the list, select a Profile. You can repeat step 5 to add multiple Profiles.

Note - You can only add Profiles from the same social media network to a Distribution List.

Add Profiles

7. If you add Facebook Profiles in the Add Profiles field, you can geo-target Facebook users based on country (location) and/or Language. Geo-targeting enables you to send posts to users based on their Country and/or Language settings in Facebook. Location is based on a Facebook user's IP address and language is based on a Facebook user's default language settings or the language a user selects when they first register for Facebook. To geo-target Facebook users, take the following steps:

- In the Apply to the following Countries section, type the name of a country in the Add Countries field to populate a drop-down menu of available countries. From the drop-down menu, select a country. You can repeat the above step to add multiple countries to the Distribution List.

    - Check the Everywhere radio button to post the Facebook post to all areas within the selected locations.

    - Check the By State/Province radio button to filter the selected locations by state and/or province. In the Add States field, type the name of the state and/or province by which to filter.

    - Check the By City radio button to filter the selected locations by city.In the Add Cities field, type the name of the city by which to filter.

Add Countries

- In the Languages section, type the name of a language in the Add Languages field to populate a drop-down menu of available languages. From the drop-down menu, select a language. You can repeat the above step to add multiple languages to the Distribution List.


Add Languages

8. Click **Save**.

Outbox Overview

The ConversationBuddy Outbox is a central location to view all outgoing posts. You can view all posts that are Scheduled, Waiting for Approval, Seeded or all Sent posts. You can filter the Outbox by Client, Social Profile, date and type of post.
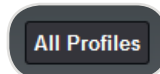
Filter Outbox Posts by Profile and Date

To filter Outbox posts, take the following steps:

1. From the ConversationBuddy navigation bar, click the **Outbox** icon to navigate to the Outbox section of ConversationBuddy.
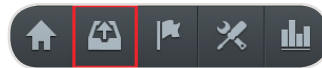
Outbox

2. To filter the Clients and Profiles displayed, click **All Profiles** to open the Client and Profiles window.
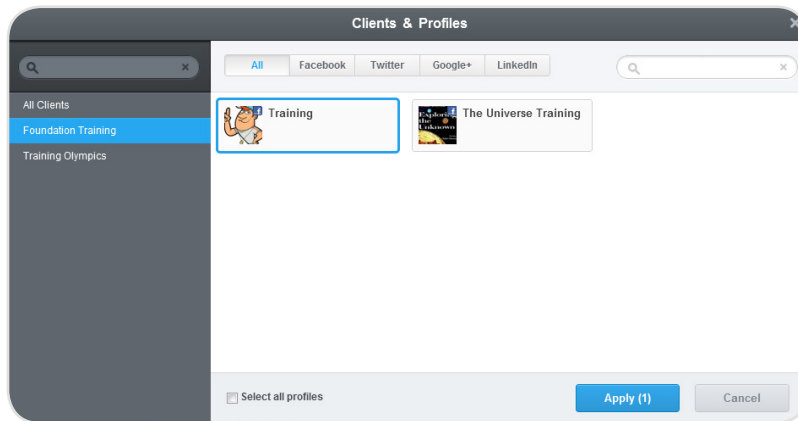

All Profiles

3. In the Client and Profiles window, in the left side bar, select a client name. Only the Social Profiles for the selected client will display.

4. Select the desired Profiles. A blue border will display around each.
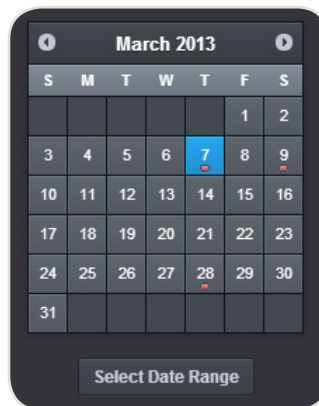
Note - To select all Profiles, at the bottom check Select all Profiles.

5. Click **Apply**.

Client and Profile Selector Window

6. You can filter the posts in the Outbox by a specific date range. In the left side bar, select a day from the calendar to filter the Outbox by one day. Or, click **Select Date Range** to select a start date and an end date to filter the Outbox by multiple days.


Select a Date Range

Note - The selected date will display in blue and the Outbox posts for the selected date will display. Red dots indicate that a post is scheduled for that date.

Filter the Outbox by Type of Post

There are 4 options to filter the Outbox:

- **All** - Displays all posts for the selected date.

- **Scheduled** - Displays all posts that are scheduled to be sent at a later date. Edit the scheduled date and post content from this section.

- **Waiting for Approval** - Displays all posts created by users who only have the permission set to compose and author posts. When users with limited permissions compose or author a post, the post will display in this section and a user with full permissions can edit, approve or remove the post.

- **Seeded** - Displays posts that have been seeded to you or posts that you have seeded.

Note - By default, posts are displayed by type All. The total number of posts for each type will display next to each type.
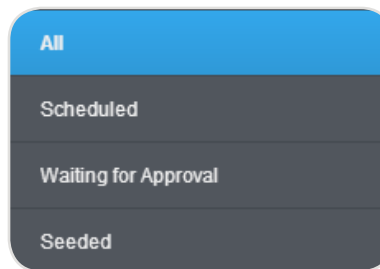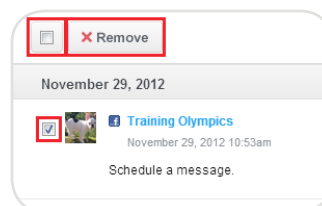

Filter Outbox by Post Type

Remove Posts in the Outbox

To remove one or more posts in the Outbox, take the following steps:

1. At the far left of each post, check the box to select it. When one or more posts are selected a Remove button displays at the top of the post list. Click **Remove** to delete posts.

2. A warning screen displays. Click **OK** to continue.

Remove Posts in the Outbox

Edit Posts in the Outbox

To edit a post in the Outbox, take the following steps:

1. At the far right of a post, click the Pencil icon.

2. In the Compose Message window, edit the content and/or date of the post.

3. Click **Save**.

Edit Posts

View Failed Posts in the Outbox

Failed posts are posts that have failed to publish due to a Facebook API or authorization issue. To view all failed posts, take the following steps:

1. In the top right hand corner of the Outbox, click **Failed Posts**.

2. A list of all posts that have failed due to a Facebook API issue or authorization issue will display. In the list of all failed posts, check the box at the far left of each post to select one or more posts.

3. When posts are selected, Retry and Remove buttons display at the top of the list.

- Click **Retry** to retry sending the post.

- Click **Remove** to delete the post.

Note - The Failed Posts icon will only display if you have posts that have failed.

Have questions? Contact us:

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