IMPLEMENTATION GUIDE

Welcome

Welcome to Salesforce Marketing Cloud! Now that your channel and admin account have been created, this guide walks through the steps to set up your Client, ConversationBuddyTM, ProfileBuddyTM, and Users.

Table of Contents

Set up a Client

Add Clients to your Channel

Setting up your social marketing suite channel to reflect your organization's structure and workflow will help ensure efficient management and usage. Suite channels have the following hierarchy, from the top down:

- **Channel** - A company's instance of the Buddy Media social marketing suite, encompassing all content, users, and data.
- **Client** - A 'folder' containing all content for a specific brand or group within the suite. Multiple clients can be created to organize content, permissions, and analytics.
- **Profile** - A specific social profile. This could be a Facebook Page, Twitter handle, Google+ Page, etc.

To add a client to your channel, complete the following steps:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Admin** from the drop-down.

Admin Drop-down

3. Within the Admin section, select **Add Client**.
4. In the Client Info screen, insert necessary information. The Client Name field will determine the name for your client throughout the entire suite and should be representative of the profiles that will be included within the client.

Note - Client Name and Industry are the only required fields.

5. Click **Save**.
6. Repeat steps one through five as required to add additional clients in the channel.

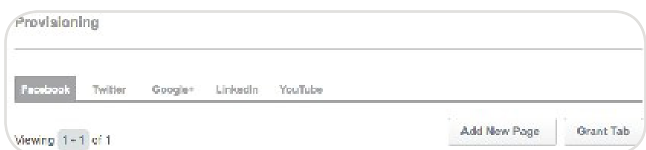
ConversationBuddy

Set up your Facebook Page

Using ConversationBuddy you can publish and moderate Facebook Page posts and comments through ConversationBuddy by adding your Facebook Page to the social marketing suite. Once added, you must authorize the Page before ConversationBuddy can post or pull in data.

To add a Facebook Page to a client, complete the following steps:

1. Log into Facebook under a Facebook Page Admin account.
2. In the same browser, log into your Buddy Media channel with the admin account credentials provided to you.
3. Click on your name in the upper right corner of the suite and select **Admin** from the drop-down.
4. Locate the client that the page should be added to and select **Edit** to the right of the client name.
5. Scroll down to the bottom of the page to view the social account set up area under Provisioning.
6. Select **Add New Page**.



Add New Page

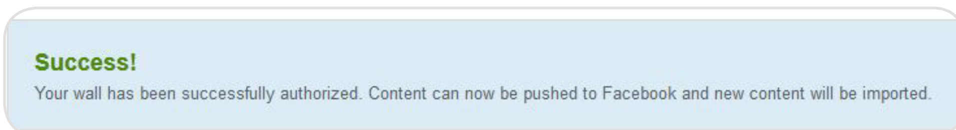
7. Enter the Facebook Page URL and click **Add**.
8. Repeat steps one through seven to add additional Facebook Pages.

Note - The Facebook Page must be published and display on Facebook before it can be added to the suite.

Authorize your Facebook Page

Once your Facebook Page has been added to ConversationBuddy the next step is to authorize the Facebook Page. To authorize the Facebook Page, complete the following steps:

1. Log in to Facebook under a Facebook Page Admin account.
2. In the same browser, log in to your Buddy Media channel.
3. Click on your name in the upper right corner of the suite and select Profiles from the drop-down.
4. To the right of the Page you want to enable, click **Authorize**. A confirmation message appears when your profile has been successfully authorized.



Confirmation Message

5. Repeat steps one through four to authorize additional Facebook Pages.

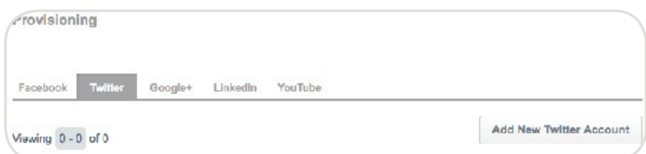
ConversationBuddy

Set up your Twitter handle

Publish and moderate Tweets through ConversationBuddy by setting up your Twitter handle within the social marketing suite. To begin, ensure that the Twitter handle account is live.

To add a Twitter handle to a client, complete the following steps:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Admin** from the drop-down.
3. Locate the client that the Twitter handle should be added to and select **Edit** to the right of the client name.
4. Scroll down to the bottom of the page to view the social account set up area under Provisioning and select **Twitter** from the tabs at the top of this section.



Add Twitter Account

5. Click **Add New Twitter Account**.
6. Enter the name of your Twitter handle without the ‘@’ symbol and click **Add**.
7. A success message will appear indicating that the Twitter handle has been added.
8. Repeat steps one through seven to add additional Twitter handles.

Authorize your Twitter handle

After your Twitter handle has been added the next step is to authorize it. To authorize the Twitter handle complete the following steps:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Profiles** from the drop-down menu.
3. To the right of the handle you want to enable, click **Authorize**.

Status	Profile	Network	Client	
	dougsbuildingg	Twitter	Doug's Building Materials	Authorize

Authorize Twitter handle

4. You will be prompted to log into Twitter to connect the account to the suite. Enter the Twitter handle username/email and password.
5. Click **Sign In**.
6. A success message will appear to verify the authorization of the Twitter handle in the suite.
7. Repeat steps one through six to authorize additional Twitter handles.

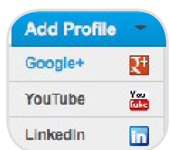
ConversationBuddy

Set up your Google+ Page

Publish and moderate posts and comments through ConversationBuddy by setting up your Google+ Page within the social marketing suite. Once added, you must authorize the page before ConversationBuddy can post or pull in data.

To Add and authorize a Google+ Page, complete the following steps:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Profiles** from the drop-down.
3. Click **Add Profile** and select **Google+.**



Add Profile

4. A pop- up window will appear. Select the desired client under which to add the profile and click **Continue**.
5. You will be prompted to sign into a Google+ Admin account of the page you are adding to the suite. Insert your username and password.
6. After you have logged in, click **Allow Access**.
7. All of the Google+ Pages you have access to will appear. Select the Google+ Page you want to enable within the suite and click **Manage Google+ Page**.
8. You have successfully added and authorized the Google+ Page under a client in the suite. Repeat steps one through eight to add and authorize additional Google+ Pages.

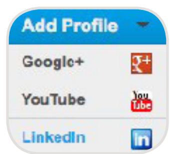
ConversationBuddy

Set up a LinkedIn Company Page

You can author and publish posts through ConversationBuddy by setting up your LinkedIn company page within the social marketing suite. Once added, you must authorize the page before ConversationBuddy can post data.

To add and authorize a LinkedIn company page, complete the following steps:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Profiles** from the drop-down.
3. Click **Add Profile** and select **LinkedIn**.



Add Profile

4. A pop-up window will appear. Select a client under which to add the profile and click **Continue**.
5. You will be prompted to sign into an Admin account of the LinkedIn company page you are adding to the suite. After you have logged in, click **Allow Access**.
6. All of the LinkedIn company pages you have access to will appear. Select the LinkedIn company page you want to enable within the suite.
7. You have successfully added and authorized the LinkedIn company page under a client in the suite. Repeat steps one through six to add and authorize additional LinkedIn company pages.

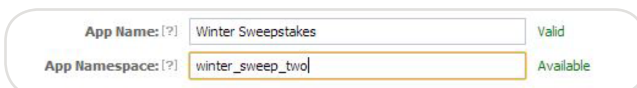
ProfileBuddy

Set Up an Application Tab on a Facebook Page

To create a Facebook application tab to manage with ProfileBuddy, first create a Facebook application and then provision the tab in the suite using two pieces of application info: application ID and application secret.

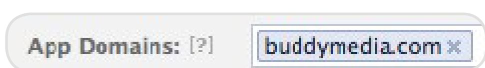
To set up a Facebook application complete the following steps:

1. Log into Facebook in a browser window and open **https://developers.facebook.com/apps**.
2. Click **+Create New App** in the upper right.
3. Enter the App Name. (This should be the name of your tab and will display on Facebook when users share content from the tab. You should also set a different name for each application you create. Example: Winter Sweepstakes)
4. Enter the App Namespace. (This should be the same as the App Name, written in lowercase with an underscore in between. [All numbers should be spelled out.] Example: winter_sweepstakes)



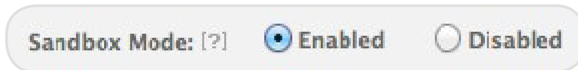
App Name and App Namespace

5. Click **Continue.**
6. Fill out the CAPTCHA code for the Security Check and click **Submit** to generate the form.
7. Enter your email address in the Contact Email field.
8. Enter **buddymedia.com** in the APP Domains field.



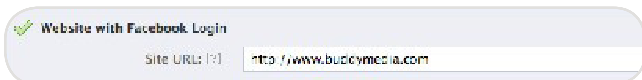
App Domains

9. To keep the tab hidden from your Facebook fans until you are ready to launch, select **Enabled** next to Sandbox Mode. (Disable it to launch the tab and make it visible to all fans.)



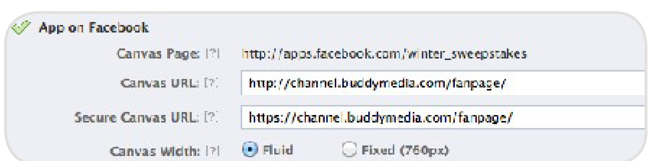
Sandbox Mode

10. Select the **check mark** to the left of Website with Facebook Login.
11. Enter **http://www.buddymedia.com** into the Site URL field.



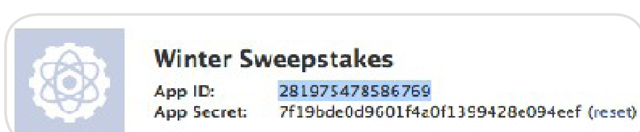
Site URL

12. Select the **check mark** to the left of App on Facebook.
13. For Canvas URL enter **http://channel.buddymedia.com/fanpage/**
14. For Secure Canvas URL, enter **https://channel.buddymedia.com/fanpage/**
15. Set Canvas Width to **Fluid**.



Canvas URL, Secure Canvas URL and Canvas Width

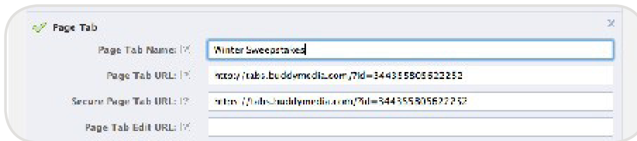
16. Select the **check mark** to the left of Page Tab.
17. Enter the Page Tab Name. (This can be the same as the App Name from step 3.)



Page Tab Name

18. For Page Tab URL, enter **http://tabs.buddymedia.com/?id=app ID**, located at the top of the same page.

19. For Secure Page Tab URL, enter **https://tabs.buddymedia.com/?id=app ID**, from the top of the same page.



Secure Page Tab URL

20. Click **Save Changes**.
21. Select Roles from the navigation on the left to add additional developers to this app. (The user creating the app is automatically added as a developer.)
22. Select **Add** next to Developers and enter the developer name or email in the window that opens.

Now that you have set up the application on Facebook, you can locate the two pieces of information necessary to identify your app to Buddy Media: the **App ID** and **App Secret**. These are listed at the top of the **Settings: Basic** page. Identify this info and keep it open; you can now take this information to create a category.

ProfileBuddy

Create a Category

A category connects a Facebook application to the Buddy Media suite. The unique application ID and application secret that have been generated via the application are both added to the category to allow the application to be managed within ProfileBuddy. Determining the type of category you need is the first and most important step. There are three ways to set up categories:

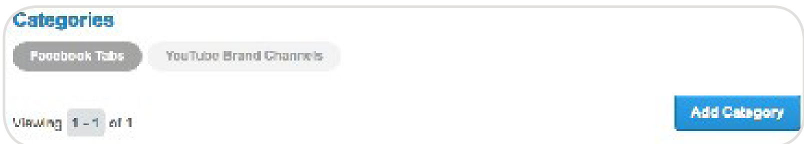
- **Blank Category**: To build and launch a tab that will only be used on one page or tab version, you should create a Blank Category by using an Unmanaged layout.
- **Managed Category**: To build and launch a category that acts as a template to roll out to multiple pages or tab versions, create a Managed Category. The category will act as a template so that your application tabs have the same look and feel across multiple Facebook Pages. Managed categories 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 Category**: To build and launch a category that acts as a template, but that can be changed or modified at a tab version level, create an Unmanaged Category. 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 reside within the layout, and what content is used within each sapplet.

After choosing a category type from the list above, follow the instructions below for the type you have selected.

To create a category, complete the following steps:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Admin** from the drop-down.
3. Select **Categories** from the left navigation.

4. With Facebook Tabs selected in the toggle at the top, click **Add Category**.

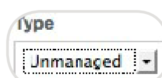


Add Category

5. Enter the category Name. (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. Choose the desired category layout Type:
   - For Managed categories, select **Managed**.

Managed

   - For Unmanaged categories or Blank categories, select **Unmanaged**.

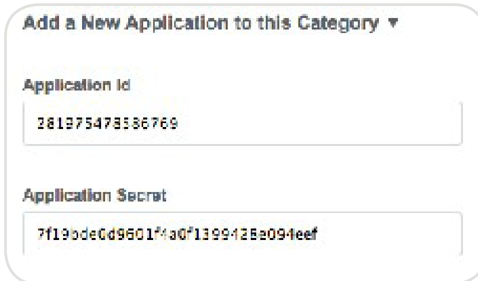


Unmanaged

Note - If you have selected an Unmanaged category, 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.

7. Leave as default Network set to Facebook.
8. Click **Add a New Application to this Category**.

9. Enter the **App ID** and **App Secret** that were generated after setting up the Facebook application.



App ID and App Secret

10. Click **Save**.

11. To add a category/tab to a page, the category first needs to be published. Now that the category has been created, you will be defaulted to the Content area of the category. Click **Publish** in the upper right hand corner to publish the category.

    - If you have chosen to create a Blank category, you can publish the category as soon as it has been created. You should then add the category to a tab and control all content and sapplets from within the tab version in ProfileBuddy.
    - If you have chosen to create a Managed category, you can publish the category as soon as it has been created. Any additional changes you make in the category prior to launch will need to be published. It's important to note that if you have any client controlled sapplet content, any changes to the seed content will not be reflected once the tab has been added to a page.
    - If you have chosen to create an Unmanaged category, the category should be published after the template has been built within the category and no further changes are needed before rolling out to the tab versions.

ProfileBuddy

Connect your Category to your App

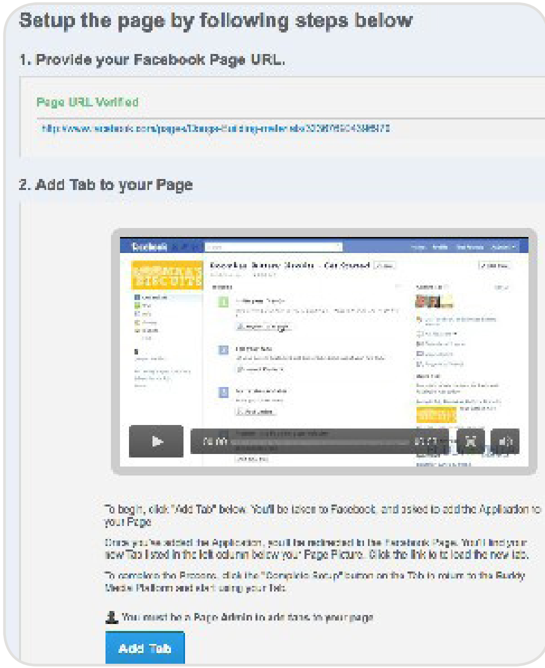
After a category has been created and published, you can create a ProfileBuddy tab on a Facebook page and connect the category and app:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Admin** from the drop down.
3. In the left navigation, click **Clients**.
4. Locate the client that contains the profile you want to add a tab to and click **Edit**.
5. Scroll down to the Provisioning section at the bottom of the client edit page and click **Add Tab** next to the Facebook Page to which you want to add the tab.
6. Use the drop-down under Category/Tab to locate the category you created and the app you added to that category. Select the Facebook Page to add the application tab to and click **Save**.
7. Upon selecting a category/tab, you will be defaulted back in the Provisioning section of the client's edit page. Click **Setup** next to the tab name to add the application tab to your Facebook Page.

Setup

9. Follow the prompts and instructions within the suite to set up your application tab. The Facebook Page URL will be verified.

10. Click the **Add Tab** button to complete the process.



Add Tab

11. Select **Choose Facebook Pages** to open a drop-down of all available Pages and select the Page that you want to add the tab to.

12. Select **Add Page Tab**. Once confirmed, you will be directed to the layout section of ProfileBuddy to begin making updates to your new tab.

ProfileBuddy

Launch your Facebook tab:

1. After you have built out your sapplets and content within ProfileBuddy, publish all changes live by clicking the **Publish** button within ProfileBuddy.
2. Log into Facebook in a browser window and open **https://developers.facebook.com/apps**.
3. Select your application from the left rail.
4. Click **Edit App** from the upper right.
5. Under Basic Info set Sandbox Mode to **Disabled**.

Sandbox Mode Disabled

6. Click **Save Changes**. The tab is now live on Facebook.

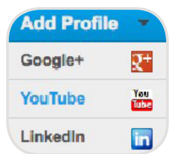
ProfileBuddy

Set up your YouTube Video Channel

You can manage YouTube channel videos and playlists through ProfileBuddy by setting up your channel as a profile within the social marketing suite.

To add and authorize a YouTube video channel, complete the following steps:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Profiles** from the drop-down.
3. Click **Add Profile** and select **YouTube**.



Add Profile

4. Select the desired client to associate the YouTube profile with and click **Continue**.
5. This will display an authorization page for YouTube. You must be logged into Google with the account that initially created the YouTube channel. Click **Grant Access**.
6. Click **Add Account** to confirm the channel addition.
7. You have now added and authorized your YouTube video channel. Repeat steps one through six to add and authorize additional YouTube video channels.

ProfileBuddy

Set up a 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 YouTube video channel in the suite.

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

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
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** from the left hand rail.
4. Select **YouTube Brand Channels** from the toggle underneath the Categories heading.
5. Click **Add Category**.

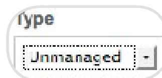
Add Category

6. Enter the Category Name. (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.)
7. Choose the desired category layout Type:

   - **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.

Managed

- **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 reside within the layout, and what content is used within each sapplet.



Unmanaged

8. 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.
9. Keep Network set to **YouTube**.
10. Click **Save**.
11. After the category has been created, select **Clients** from the left hand rail.
12. Locate the client you associated with your YouTube video channel.

Provisioning

13. Scroll to the bottom of the client's edit page where the Provisioning section is located and select **YouTube**.
14. The YouTube video channel you added in the Profiles section of the suite will be shown. Click **Add Tab**.
15. Select the category you have already added from the drop-down menu.
16. You will be taken to the Edit YouTube Tab section, where you can add locales to the client. Click **Save**.
17. 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 sixteen to set up multiple YouTube brand channels.

ProfileBuddy

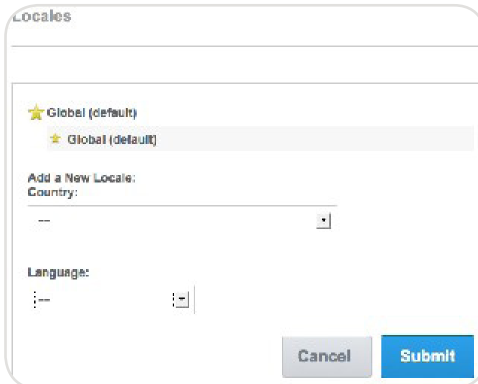
Add Additional Locales to a Tab

Locales can be updated within Facebook and YouTube tab to set up Tab versions; this enables you to target specific audiences. With ProfileBuddy, users have the ability to manage their custom tab at the global level and also at a more localized level through the use of tab versions. Through the creation 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 their 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 be served up the content created for that specific tab version.

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

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Admin** from the drop-down.
3. In the left navigation, select **Clients**.
4. Locate the client where the Facebook or YouTube profile resides and click **Edit**.
5. Scroll down to the Provisioning section.
    - To update locales for a Facebook tab, locate the Facebook Page and click on the tab name.
    - To update locales for a YouTube tab, select the YouTube portion of the Provisioning section, locate the YouTube brand channel and click **Edit Tab**.
6. Scroll down to the Locales section.

7. Add a locale by selecting a country and language from their respective drop-downs.



Country and Language

8. Click **Submit** to save the locale and have it added to the custom tab for that Facebook Page.
9. Repeat these steps to add additional locales.
10. To set a default tab version that will be seen by Facebook users who do not meet the parameters of an existing locale, click **Set Default** next to the locale.

Set Default

11. To disable a tab version so that it is not live on the Facebook Page, click **Disable** next to the locale.

Disable

Locales will appear as tab versions under your custom tab when your Facebook Page is selected in the profiles index page of ProfileBuddy.

Create Users and Set Permissions

One of the key features of using the Buddy Media social marketing suite is the ability to create granular permissions that do not exist natively within social networks. Robust options are available for permissions across the suite, so we recommend creating user groups and setting permission levels for each group to reflect the types of user roles within your organization. This allows 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.

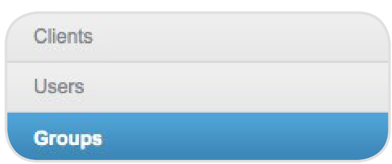
It is recommended that you finish creating clients within the channel and adding all social profiles before adding users, to ensure that you can set the correct permissions for each suite user.

Basic permission settings include:

- Read: The ability to view all content and analytics.
- Edit Content: The ability to edit or add content or posts that are submitted for review.
- Schedule & Publish: The ability to publish and/or schedule content.

To create a permissions group, complete the following steps:

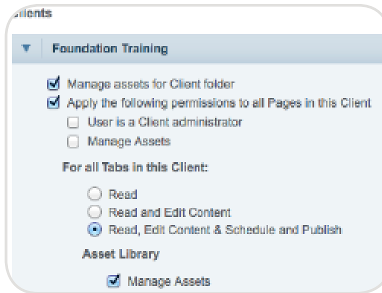
1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Admin** from the drop-down.
3. In the Admin section, click on **Groups** from the left hand rail.



Groups

4. Within Groups, click **Add Group**.
5. Input a Group Name. (A specific name that describes the permissions within the group or the role type will help keep your permission group names organized and easy to use.)

6. Permissions can be applied broadly at the channel level (directly beneath Group Name). this enables you to dive deeper and set more granular permissions at the client level, profile level and tab version level. To apply permissions more granularly, scroll to the bottom of the Groups section, select a client and continue moving through the hierarchy of your channel.



Permissions

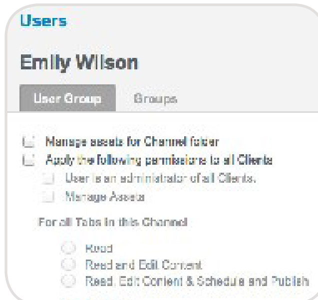
7. You can set permission levels that will be applied to the group for that specific scope. Permission dialog fields will expand or will remain restricted from selection based on permission levels previously selected.

8. Click **Save**. Repeat steps one through eight to create additional user groups.

Create New User Accounts:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Admin** from the drop-down.
3. Select **Users** from the left hand rail.
4. Scroll to the bottom of the page and click **Add User**.
5. Enter the new user's First Name, Last Name and Email.
6. Optionally, enter the new user's Phone, Title, Organization and Time Zone.
7. Click **Save**.

8. The User Group permissions tree will display. You can set individual permissions for the user here, or you can toggle to the Groups tab and enter a permissions group name in the Add a Group search box.



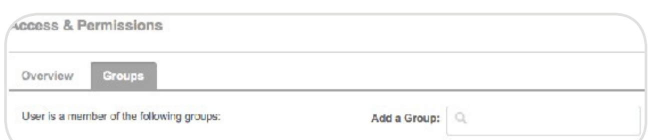
User Group

9. Once you have set individual or group permissions, you can toggle back to the User Group settings, scroll to the bottom of the page, and click **Save**.
10. You will land on the user overview page. Click **Send Welcome Email**. An email will be sent to the user's email address with instructions on how to activate their account and set a password.

Note - Users must click on the link in the email within 72 hours to activate their account.

To change a user's permissions or user groups at a later date:

1. Log into your Buddy Media channel with the Admin account credentials provided to you.
2. Click on your name in the upper right corner of the suite and select **Admin** from the drop-down.
3. Select **Users** from the left hand rail.
4. Locate a user to place into the group: scroll through the list of users or use the search box.
5. Click **Edit** to the right of the user's name.
6. Scroll to the bottom of the page to find the user's Access & Permissions section and select **Groups**.



Access & Permissions

7. Click **Edit** next to any of their existing groups to edit the permissions of that group.

Note - Changing the settings in a group will change them for all suite users within that group.

8. To add the user to an additional group, start typing the name of the group in the Add a Group search field and select the group from the list that appears.
9. Click **Save** to finalize permission group changes.

Have questions? Contact us:

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

@marketingcloud T 1-888-672-3426

