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# LOG IN AND REGISTER ACCOUNTS

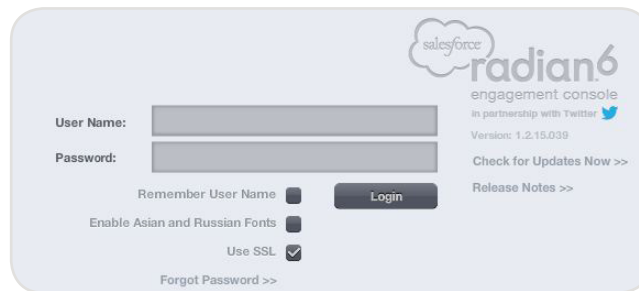
## Log In and Register Accounts Overview

The Radian6 Engagement Console is a desktop application. It displays your Radian6 Topic Profiles alongside your personal or corporate Twitter and Facebook streams. The Engagement Console enables you to respond to posts and produce new content in a team environment.

### Log In to the Engagement Console

To log in to the Engagement Console, take the following steps:

1. Launch the Engagement Console application from your computer.
2. Insert your Username and Password.
3. Click **Login**.



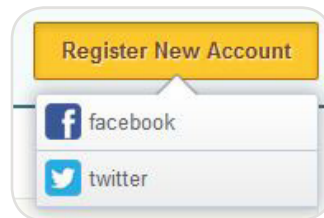
*Login Screen*

You will be prompted to register your social media accounts. You can use these accounts to respond to posts or create new content to distribute via multiple media channels.

## Register Twitter Personal Accounts

Personal Accounts give you all the functionality Twitter offers. To add Twitter accounts in the Social Account Management user interface, take the following steps:

1. From the Engagement Console header menu, select **File/Accounts** (Radian6 Engagement Console/Accounts on a Mac).
2. Select **Personal Account**.
3. Click **Edit Twitter Accounts**.
4. Click **Manage Twitter Accounts**.
5. You will be directed to the Social Account Manager site. Enter your Salesforce Radian6 credentials.
6. Click **Register New Account**. From the drop-down menu, select **twitter**.



Register New Account

7. Enter the Twitter username that you wish to integrate.
8. Enter your Password.
9. Select **Authorize App**. You will be directed back to the Social Account Manager site.

### Authorize Radian6 to use your account?

This application **will be able to:**

- Read Tweets from your timeline.
- See who you follow, and follow new people.
- Update your profile.
- Post Tweets for you.
- Access your direct messages.

Username or email

Password

[Forgot your password?](#)

Authorize



10. Click **Logout**, to leave the Social Account Manager site.
11. In the Twitter Account window, click **Done**.
12. For this account to be available for use, you need to log out of the Engagement Console and back in again.

*Note - If you are adding multiple accounts, such as personal and corporate, it's a good idea to select one and click Set as Default.*

## Register Twitter Managed Accounts

Registering accounts as Managed Accounts adds all Radian6 workflow capabilities to all your Twitter posts. To add Twitter accounts in the Social Account Manager user interface, take the following steps:

1. From the Engagement Console header menu, select **File/Accounts** (Radian6 Engagement Console/Accounts on a Mac).
2. Select **Managed Account**.
3. Click **Edit Twitter Managed Accounts**.
4. Click **Edit Twitter Managed Accounts**.
5. You will be directed to the Social Account Manager site. Enter your Salesforce Radian6 credentials.
6. Click **Register New Account**. From the drop-down menu, select **twitter**.
7. Enter the Twitter username that you wish to integrate.
8. Enter your Password.
9. Select **Authorize App**. You will be directed back to the Social Account Manager site.
10. Click **Register**.
11. From the Visibility drop-down menu, select the desired visibility:
  - **Private** (default) - Only the Managed Account Owner has access.
  - **Public** - Everyone with a Radian6 ID in an environment has access.
  - **Project** - Everyone listed as a member of a project and who has a Salesforce Radian6 ID is able to access.

*Note - When you select Public all users in your Marketing Cloud Client will be able to access and use this twitter social account in the same manner as you through the Salesforce Marketing Cloud Services.*



12. If Project is selected, choose the desired project from the **Project** drop-down menu.
13. If desired, using the **Display Name** field modify how your display name appears.
14. Choose the content you wish to include:
  - **Mentions** - Displays Twitter posts in which your Twitter handle has been @mentioned.
  - **Direct Messages** - Displays Twitter posts in which a user has directly messaged the selected Twitter Managed Account.
  - **My Tweets** - Displays Twitter posts which have been sent from the selected Twitter Managed Account.

Visibility	Project	Display Name	Select Content to Include
Public	Select...	@greenyschool	<input checked="" type="checkbox"/> Direct Messages <input checked="" type="checkbox"/> Mentions <input checked="" type="checkbox"/> My Tweets

*Managed Accounts Menu*

15. Click **Save**.
16. Click **Logout**, to leave the Social Account Manager site.
17. In the Twitter Account window, click **Done**.
18. For this account to be available for use, you need to log out of the Engagement Console and back in again.

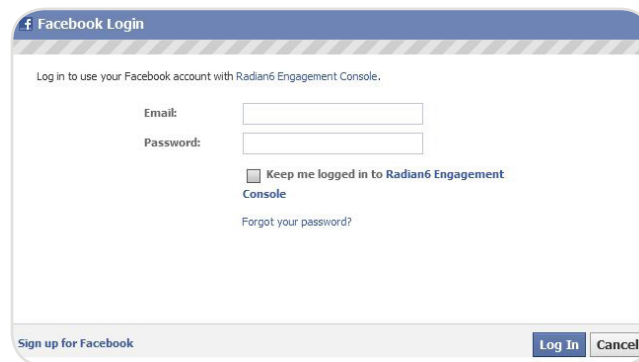
*Note - Super Users can see all Social Accounts, not just the ones they have created. You can also sort Social Accounts by owners.*

## Register a Facebook Account

To register a Facebook account, take the following steps:

1. From the Engagement Console header menu, select **File/Accounts** (Radian6 Engagement Console/Accounts on a Mac).
2. Click **Add Facebook Account**.
3. Enter your Email address and Password.
4. Click **Log In**.
5. To keep your account logged in, check the **Keep me logged in to Radian6 Engagement Console** box.
6. Click **Done**.

*Note - The Engagement Console is limited to one Facebook account, but any number of Twitter and Chatter accounts can be added.*



A screenshot of a Facebook Login dialog box. The title bar says "Facebook Login". The main text says "Log in to use your Facebook account with Radian6 Engagement Console." Below this are two input fields: "Email:" and "Password:". Under the password field is a checkbox labeled "Keep me logged in to Radian6 Engagement Console". Below the checkbox is a link that says "Forgot your password?". At the bottom left is a link "Sign up for Facebook". At the bottom right are two buttons: "Log In" and "Cancel".

Facebook Login



## Register Facebook Managed Accounts

Registering accounts as Managed Accounts adds all Radian6 workflow capabilities to all your Facebook posts. To add Facebook accounts in the Social Account Manager user interface, take the following steps:

1. From the Engagement Console header menu, select **File/Accounts** (Radian6 Engagement Console/Accounts on a Mac).
2. Select **Managed Account**.
3. Click **Edit Facebook Managed Accounts**.
4. You will be directed to the Social Account Manager site. Enter your Salesforce Radian6 credentials.
5. Click **Register New Account**. From the drop-down menu, select **Facebook**.
6. Enter the Facebook username that you wish to integrate.
7. Enter your Password.
8. Select **Log in**. You will be directed back to the Social Account Manager site.
9. Click **View Pages**. A list of all Facebook Pages for which you are an admin will display.
10. To the right of the Facebook Page that you want to create as a Managed Account, click **Register**.
11. From the Visibility drop-down menu, select the desired visibility:
  - **Private** (default) - Only the Managed Account Owner has access.
  - **Public** - Everyone with a Radian6 ID in an environment has access.
  - **Project** - Everyone listed as a member of a project and who has a Salesforce Radian6 ID is able to access.

*Note - When you select Public all users in your Marketing Cloud Client will be able to access and use this Facebook social account in the same manner as you through the Salesforce Marketing Cloud Services.*

12. If Project is selected, choose the desired project from the **Project** drop-down menu.
13. If desired, using the **Display Name** field modify how your display name appears.
14. Choose the content you wish to include:
  - **Received Inbox Messages** - Displays Facebook messages sent to the selected Facebook Managed Account.
  - **Posts** - Displays all Facebook posts on the selected Managed Account.
  - **Comments** - Displays all comments on Facebook posts on the selected Facebook Managed Account.



- **Sent Inbox Messages** - Displays Facebook messages sent from the selected Facebook Managed Account.
- **Replies** - Displays all replies to Facebook comments on the selected Facebook Managed Account.

Visibility: Public  
Project: Select...  
Display Name: Dalmatian  
Source Filter URL: <http://www.facebook.com/feeds/page.php?format=atom10&id=30379529641&>  
Select Content to Include:  
☒ Posts & Comments  
☒ Inbox Messages  
Save

Managed Accounts Window

15. Click **Save**.
16. Click **Logout** to leave the Social Account Manager site.
17. In the Managed Account window in the Engagement Console, click **Done**.
18. For this account to be available for use, you need to log out of the Engagement Console and back in again.

*Note - Super Users can see all Social Accounts, not just the ones they have created. You can also sort Social Accounts by owners.*



## Register a Chatter Account

Registering a Chatter account may require a security token. To set up Chatter, in the Engagement Console:

1. Select **File/Accounts** (Radian6 Engagement Console/Accounts on a Mac).
2. Click **Retrieve Salesforce Chatter Account**.
3. Insert your Salesforce Username and Password (Security Token).
4. Insert your Security Token (optional).
5. Click **Register**.
6. Click **Done**.



Chatter Account

## Register Bit.ly Account

To register a Bit.ly Account, take the following steps:

1. Select **File/Accounts** (Radian6 Engagement Console/Accounts on a Mac).
2. Click **Add Bit.ly Account**.
3. Insert your Bit.ly Username.
4. Insert the API Key from your Bit.ly Account.
5. Click **Register**.
6. Click **Done**.

## Remove an Account

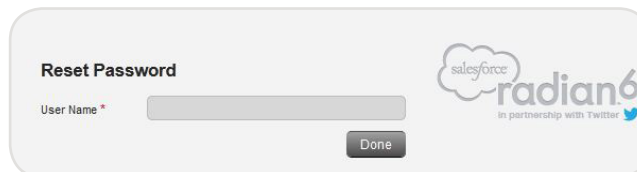
You may need to remove an account, if your account has changed. To remove an account, take the following steps:

1. Select **File** (Radian6 Engagement Console/Accounts on a Mac). Click **Accounts**.
2. Beneath the account you would like to remove, click **Manage Accounts**.
3. Select the account you need to remove.
4. Click **Remove**.
5. Click **Done**.

## Forgot Password

If you have forgotten your password and need to reset it, take the following steps:

1. On the Radian6 Engagement Console login screen, click the **Forgot Password** button.
2. The Reset Password page opens. Insert your Email Address.
3. Click **Done**. An email will be generated and sent to your email address with password reset instructions.



The image shows a 'Reset Password' form. On the left, the title 'Reset Password' is above a text input field labeled 'User Name \*'. To the right of the input field is a 'Done' button. On the far right is the Radian6 logo, which includes the text 'salesforce', 'radian6', and 'in partnership with Twitter'.

*Reset Password*



## Engagement Console Keyboard Shortcuts

You can use several of the shortcuts shown below for Windows and Macs to make navigating the Engagement Console easier.

Windows Shortcut	Function
Ctrl + Shift + U	Check for updates
Ctrl + ,	Preferences
Ctrl + 1	Launch accounts window
Ctrl + P	Launch post window
Ctrl + T	Manage extensions
Ctrl + E	Manage workspaces
Ctrl + R	Manage permissions
Ctrl + G	Salesforce Chatter groups and users
Ctrl + C	Copy
Ctrl + X	Cut
Ctrl + V	Paste
Ctrl + A	Select all in Stack
Ctrl + Shift + A	Add all in Stack to selection
Ctrl + click	Select multiple posts
Shift + click	Select first and last post to select consecutive items



Mac Shortcut	Function
Cmd + Shift + U	Check for updates
Cmd + ,	Preferences
Cmd + 1	Launch accounts window
Cmd + P	Launch post window
Cmd + T	Manage extensions
Cmd + E	Manage workspaces
Cmd + R	Manage permissions
Cmd + G	Salesforce Chatter groups and users
Cmd + C	Copy
Cmd + X	Cut
Cmd + V	Paste
Cmd + A	Select all in Stack
Cmd + Shift + A	Add all in Stack to selection
Cmd + click	Select multiple posts
Shift + click	Select first and last post to select consecutive items

## Check For Updates





You are able to check for updates to the Engagement Console. This will ensure that you are using the most recent and up to date version of the platform. To check for updates, complete the following steps:

1. Click **File** (Radian6 Engagement Console on a Mac).
2. Click **Check for Updates**.

The Engagement Console automatically checks for updates each hour. To turn off the hourly automatic checking of updates, complete the following steps:

1. Click **File**, Select **Preferences**. (Radian6 Engagement Console/Preferences on a Mac).
2. In the Application Update section, deselect the check box **Check for updates every hour**.

## Have questions? Contact us:

-  [www.salesforcemarketingcloud.com](http://www.salesforcemarketingcloud.com)     [marketingcloud@salesforce.com](mailto:marketingcloud@salesforce.com)  
 [@marketingcloud](https://twitter.com/marketingcloud)     1-888-672-3426

# LAUNCHING STACKS

## Stack Information Overview

Stacks are lists of social media posts from your Radian6 Topic Profiles, or posts from your personal or corporate Twitter, Chatter, Facebook Accounts, and Facebook Pages.

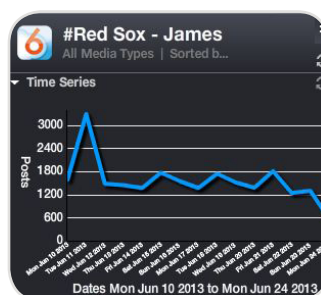
As new posts come in, a New Items alert will appear at the top of the Stack, informing you how many new items are waiting. When you are ready to view them, click the yellow alert button and the posts will display in the Stack.

If you want posts to display automatically as they come in, click the **Stop** button. It will then change to a Play button. Click the **Refresh** icon to manually refresh the Stack.



*Stop, Play and Refresh*

Click the **Next** button at the bottom of a Stack to view more posts. When you click the Next button, you will see page icons appear at the top of the Stack. Click **Time Series** to view the number of posts coming into the selected Topic Profile in the last 14 days.



*Time Series*

To edit a Stack, mouse over the name of the Stack at the top. Click on the **Edit** arrow that appears to fade or flip the Stack over to make changes. Click **Save and View Stack** at the bottom when finished editing. Clicking **X** will close the Stack and you will have to build it again.

## Launching Stacks

Along the top of the Engagement Console you will see 7 icons, each representing a different Stack type, as shown below:



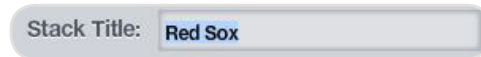
Engagement Console Stacks

### Radian6 Topic Stack

The Radian6 Topic Stack enables you to monitor the activity taking place around your Topic Profile. You will see posts from the last four days.

To configure the Radian6 Topic Stack, take the following steps:

1. In the Add Stack menu, click the **Radian6 Topic Stack** icon.
2. In the Stack Title field, name the Stack (optional).



Stack Title

3. In the Stack Topics field, click on the desired Topic Profile. You can bring in content from one or more Topic Profiles.

*Note - If a Topic Profile is not selected on the configuration side of the Stack, the Date Range will be disabled.*

4. Select Keyword Groups to display for the Topic Profile. You can choose to return all Keyword Groups or select specific groups to display.



Stack Topics and Keyword Groups



5. Select **Real Time Monitoring** (Refresh Rate) or specify a **Specific Date Range** (defaults to Real Time Monitoring).
6. Select **All Media Types** or only display specific Media Types from your Topic Profile (this will work if you have selected only one Topic Profile that has multiple Keyword Groups).

*Real Time Monitoring and Media Types*

7. From the Sort By drop-down, select the order in which you would like the posts to display. (Defaults to Received Newest First.)
  - **Received Date** refers to the time at which content was brought into Radian6.
  - **Published Date** refers to the time at which content was authored. (i.e. Created on Twitter.)

*Sort By*

8. From the Filter By drop-down, (defaults to All Content) select the posts you would like to display:

- **All Content** - Real time monitoring brings back the last 96 hours worth of data.
- **Open Assigned** - Returns all posts that are open and assigned, from all the Topic Profiles across the Client ID.
- **Open Assigned and Unassigned Data** - Returns all posts that are open and assigned from all the Topic Profiles across the Client ID AND all unassigned posts from the selected Topic Profile.
- **Assigned To Specific User** (select the user from the list) - Returns all posts that are assigned to a selected user. There is no time limit on how old the data is and the content is independent of the Topic Profile.
- **Unassigned** - Returns unassigned posts from the last 96 hours. Posts that have workflow and are already in the Stack will stay there until new items are added when clicking on the yellow badge.
- **Post Tag/Queue** - Returns all posts that have a Post Tag added in the last 96 hours. It is specific to the selected Topic Profile only. You must specify a Post Tag.
- **Source Tag/Queue** - Returns all posts that have a Source Tag added in the last 96 hours. It is specific to the selected Topic Profile only. You must specify a Source Tag.
- **Any Positive Sentiment** - Returns all posts that have a positive sentiment set and that have been added in the last 96 hours.
- **Any Negative Sentiment** - Returns all posts that have a negative sentiment set and that have been added in the last 96 hours.

Filter By:

Source Tag(s)

employee

Filter By - Source Tag





Note - You can combine different filters by clicking the (+) sign to Add Filter. This enables you to display a very specific piece of your Topic Profile.

Filter By:

Source Tag(s) [dropdown]

strategicobjectives [trash icon]

AND Assigned To Specific User [dropdown] [trash icon]

James McIntyre [dropdown]

+ Add Filter

Filter By - Post Tag and Assigned to Specific User

9. In the Keyword Filter field, insert a term or terms to search (defaults to blank).

Keyword Filter:

[text input field]

Keyword Filter

10. Using the slider, select the number of Posts per Page to display (defaults to 20).

Posts per Page:

- [slider] + 20

Save and View Stack

Posts per Page

11. Click **Save and View Stack**.

## Radian6 My Tasks

My Tasks is like an inbox of tasks. All tasks assigned to you through Workflow (from a Topic Profile or Twitter or Facebook Managed Account) display in this Stack, regardless of the Topic Profile you select in the Topic Profile drop-down. For more information on assigning tasks, please see *How to Guide 5: Post Assignments*.

To launch a My Tasks Stack, take the following steps:

1. In the Add Stack Menu, click the **My Tasks** icon.
2. In the Stack Title field, name your Stack.

Stack Title: Red Sox

Stack Title

3. In the Stack Topics field, click on the desired Topic Profile. This is optional, however if you would like to Filter By, you are required to select a Topic Profile.

Stack Topics (Optional):

Click here to find topics...

#Red Sox

Stack Topic Profile

4. Select your Refresh Rate (manual or preset interval).

Real Time Monitoring (Refresh Rate):

30 seconds

Real Time Monitoring

5. Select **All Media Types** or only display specific Media Types from your Topic Profile.

**Media Types:**

☐ All

☒ Specify

<input checked="" type="checkbox"/> Blogs	<input type="checkbox"/> Forum Replies
<input type="checkbox"/> Videos	<input type="checkbox"/> Comments
<input type="checkbox"/> Images	<input checked="" type="checkbox"/> Facebook
<input type="checkbox"/> Mainstream News	<input type="checkbox"/> Aggregator
<input type="checkbox"/> MicroMedia	<input type="checkbox"/> Buy/Sell
<input type="checkbox"/> Forums	<input type="checkbox"/> MySpace

Media Types

- From the Sort By drop-down, select the order in which you would like the posts to display (defaults to Received Newest First).
  - Received Date** - Refers to the time at which content was brought into Radian6.
  - Published Date** - Refers to the time at which content was authored (created on Twitter).

**Sort By:**

Received - Newest First

Received - Newest First

Received - Oldest First

Published - Newest First

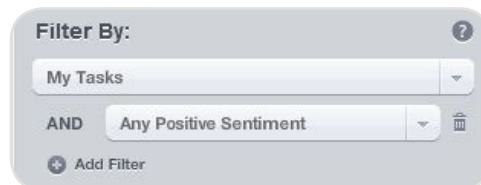
Published - Oldest First

Sort By

- From the Filter By drop-down (defaults to My Tasks), click **Add Filter** to select the posts you would like to display:
  - My Tasks** - Returns posts assigned to the current user which are not closed. Posts marked as spam are also included. A post can be older than 96 hours and the post content is not necessarily specific to the selected Topic Profile.
  - Post Tag/Queue** - Returns all posts with a Post Tag added in the last 96 hours. Post tags are specific to your selected Topic Profile. You must specify a Post Tag.
  - Source Tag/Queue** - Returns all posts that have a Source Tag added in the last 96 hours. Source tags are specific to your selected Topic Profile. You must specify a Source Tag.
  - Any Positive Sentiment** - Returns all posts that have a positive sentiment and that have been added in the last 96 hours.

- **Any Negative Sentiment** - Returns all posts that have a negative sentiment and that have been added in the last 96 hours.

*Note - You can combine different filters by clicking the (+) sign to Add Filter again. This enables you to display a very specific piece of your Topic Profile.*



*Filter By - My Tasks and Any Positive Sentiment*

8. In the Highlight Keywords field, insert a term or terms to search (optional). This term will highlight in red (defaults to blank).
9. Using the slider, select the number of Posts per Page to display (defaults to 20).
10. Click **Save and View Stack**.

## Twitter Stack

Twitter Stacks are independent of Radian6 and contain actual Twitter posts. Use the Engagement Console to send Tweets, shorten URLs automatically, and view mentions, direct messages and tweets from your friends. Twitter users can organize others into groups, or lists. When you select to view a list, you will see a stream of tweets from all the users included in that group. The Twitter Stack will display content from the last 7 days.

To launch a Twitter Stack, take the following steps:

1. From the Add Stack menu, click the **Twitter Stack** icon.
2. From the Account drop-down, select the desired Twitter account.
3. Choose the desired Refresh rate.



*Refresh Rate*



4. Select the View of the Stack.

*View*

*Note - We advise when configuring a Stack to select Mentions and DMs. Selecting the Friends options can return an overwhelming volume of posts.*

5. Select to View My Lists or a Public List.

*My Lists or Public List*

6. In the Search field, enter a term or Twitter handle to search for in your feed.

*Search*



7. Using the slider, select the number of Posts per Page.
8. Click **Save and View Stack**.

Posts per Page:

— [Slider] + 20

Save and View Stack

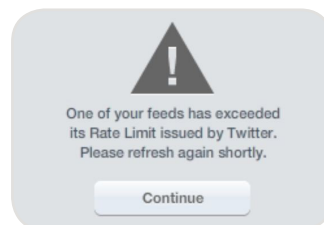
*Posts per Page*

## Twitter Stack Rate Limit

Twitter Stack Rate Limit applies to all team members. A call is counted when Twitter is contacted for more information. Twitter Rate Limiting is on a per call basis; it is on specific calls, so you can only do a specific type of call so many times per rate limit window (15 minutes). If no further calls remain to be used, your Twitter Stack will remain open, however, it will not update with new tweets.

*Note - You can adjust the Refresh Rate to reduce the number of calls made each hour. Request only what you need, and only when you need it.*

Once you have exceeded the Rate Limit, the following message will appear to notify you:



*Rate Limit Exceeded*



A breakdown of how many calls are available per rate limit window is available in the table below:

Name	Description	Number of Calls every 15 minutes
account	Authenticating user (this is done on login, when accounts refresh)	15
lists	Lists the user owns (this done on login, when accounts refresh)	15
friendships	Returns relation between two users (profile Stack following/un-following section)	15
users	Shows all profile content about a user and most recent tweets (profile Stack)	180
statuses	Shows all tweets from those you have chosen to follow on Twitter (Friends feed on personal Stack)	15
statuses	The Mentions timeline shows all mentions that contain an @ username. (Mentions feed on personal Stack)	15
direct_messages	Direct message received. (DM feed on personal Stack)	15
direct_messages	Direct message sent. (DM feed on personal Stack)	15
statuses	Returns count of tweets that have recently been retweeted by others (Retweets of Me feed on personal Stack)	15
search	Returns tweets matching a specified query (Search feed on personal Stack, search feed on profile Stack)	180
lists	Returns tweet timeline for members of a specified list (retweets not included) (Public and Personal lists feed on personal Stack)	15

## Twitter Managed Account Stack

The Twitter Managed Account Stack enables you to add all Radian6 workflow capabilities to all your posts. To configure the Twitter Managed Account Stack, take the following steps:

1. In the Add Stack menu, click the **Managed Accounts Stack** icon and choose **Twitter** from the drop-down menu.
2. In the Stack Title field, name the Stack (optional).

Stack Title:

Stack Title

3. In the Twitter Accounts field, click on the desired Twitter Account. You can bring in content from one or more Twitter Managed Accounts.
4. Select **Real Time Monitoring** (Refresh Rate) or **Specify Date Range** (defaults to Real Time Monitoring).

☒ **Real Time Monitoring (Refresh Rate):**

☐ **Specify Date Range:**  
 to

Real Time Monitoring or Specify Date Range

5. Select **All Media Types** or only display specific Media Types from your Twitter Managed Account.

**Media Types:**

☐ All  
☒ Specify

☐ DMs Sent ☐ My Tweets  
☐ DMs Received ☐ Mentions

Media Types



6. From the Sort By drop-down, select the order in which you would like the posts to display. (Defaults to Received Newest First.)

- **Received Date** refers to the time at which content was brought into Radian6.
- **Published Date** refers to the time at which content was authored (i.e. created on Twitter.)



Sort By

7. From the Filter By drop-down, (defaults to All Content) select the posts you would like to display:

- **All Content** - Real time monitoring brings back the last 96 hours worth of data.
- **Unassigned** - Returns unassigned posts from the last 96 hours. Posts that have workflow and are already in the Stack will stay there until new items are added when clicking on the yellow badge.
- **Post Tag/Queue** - Returns all posts that have a Post Tag added in the last 96 hours. It is specific to the selected Twitter Managed Account only. You must specify a Post Tag.
- **Source Tags**- Returns all posts that have a Source Tag added in the last 96 hours. It is specific to the selected Twitter Managed Account only. You must specify a Source Tag.



Filter By

Note - You can combine different filters by clicking the (+) sign to Add Filter. This enables you to display a very specific piece of your Topic Profile.



Filter By: ?

Unassigned

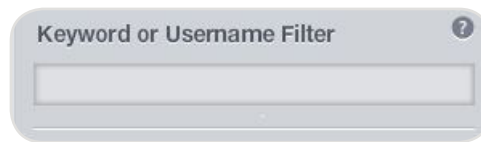
AND Post Tag / Queue

super

+ Add Filter

Filter By - Unassigned and Post Tag

8. In the Keyword or Username Filter field, insert a term or terms to search (defaults to blank).



Keyword or Username Filter ?

Keyword or Username Filter

9. Using the slider, select the number of Posts per Page to display (defaults to 20).



Posts per Page:

- 20 +

Save and View Stack

Posts per Page

10. Click **Save and View Stack**.

## Facebook Stack

Facebook Stacks contain actual posts from Facebook. To create a Facebook Stack, take the following steps:

1. From the Add Stack menu, click the Facebook icon.
2. Select the desired Refresh Rate.
3. Select the View, choose a News Feed or create a Custom Feed by selecting the specific types of posts you wish to see: Status Updates, Wall Posts, Photos or Videos.



Facebook Stack Configure

4. Using the slider, select the number of Posts per Page to display.
5. Click **Save and View Stack**.

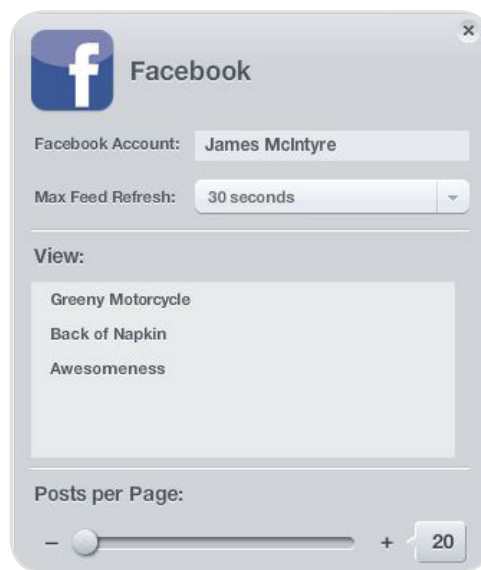
## Facebook Pages Stack

You need to be an administrator for the page and ensure you have the appropriate Facebook account connected to manage a Facebook Fan Page from a Stack. However, once connected you can complete administrator work on your pages through the Radian6 Engagement Console.

Fan Pages are intended to maintain long-term relationships with product/service fans and can be useful for reputation management. These are public pages, so anyone can like a Facebook Page without requiring permission.

To create a Facebook Page Stack, complete the following:

1. From the Add Stack menu, click the **Facebook Page** icon.
2. Select the Max feed Refresh rate.
3. From the View field, select the Facebook Page to display.



View Field

4. Using the slider, select the number of Posts per Page to display.
5. Click **Save and View Stack**.

## Facebook Managed Account Stack

The Facebook Managed Account Stack enables you to add all Radian6 workflow capabilities to all your posts. To configure the Facebook Managed Account Stack, take the following steps:

1. In the Add Stack menu, click the **Managed Accounts Stack** icon and choose **Facebook** from the drop-down menu.
2. In the Stack Title field, name the Stack (optional).

Stack Title:

Stack Title

3. In the Facebook Pages field, click on the desired Facebook Account. You can bring in content from one or more Facebook Managed Accounts.
4. Select **Real Time Monitoring (Refresh Rate)** or **Specify Date Range** (defaults to Real Time Monitoring).

☒ **Real Time Monitoring (Refresh Rate):**  
  
☐ **Specify Date Range:**  
 to

Real Time Monitoring or Specify Date Range

5. Select **All Media Types** or only display specific Media Types from your Facebook Managed Account.

**Media Types:**  
☒ **All**  
☐ **Specify**  
☐ Posts  
☐ Comments  
☐ Received Inbox Messages  
☐ Sent Inbox Messages  
☐ Replies

Media Types

6. From the Sort By drop-down, select the order in which you would like the posts to display. (Defaults to Received Newest First.)

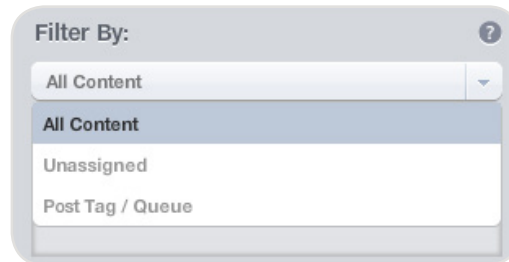
- **Received Date** refers to the time at which content was brought into Radian6.
- **Published Date** refers to the time at which content was authored (i.e. created on Twitter.)



Sort By

7. From the Filter By drop-down, (defaults to All Content) select the posts you would like to display:

- **All Content** - Real time monitoring brings back the last 96 hours worth of data.
- **Unassigned** - Returns unassigned posts from the last 96 hours. Posts that have workflow and are already in the Stack will stay there until new items are added when clicking on the yellow badge.
- **Post Tag/Queue** - Returns all posts that have a Post Tag added in the last 96 hours. It is specific to the selected Facebook Managed Account only. You must specify a Post Tag.



Filter By

Note - You can combine different filters by clicking the (+) sign to Add Filter. This enables you to display a very specific piece of your Topic Profile.



Filter By: ?

Unassigned

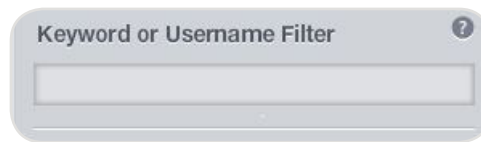
AND Post Tag / Queue

super

+ Add Filter

Filter By - Unassigned and Post Tag

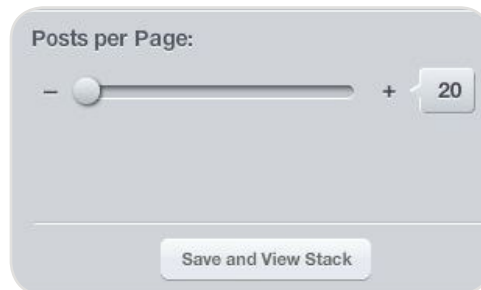
8. In the Keyword or Username Filter field, insert a term or terms to search (defaults to blank).



Keyword or Username Filter ?

Keyword or Username Filter

9. Using the slider, select the number of Posts per Page to display (defaults to 20).



Posts per Page:

- 20 +

Save and View Stack

Posts per Page

10. Click **Save and View Stack**.

## Chatter Stack

With the Salesforce Chatter Stack, you can:

- Post messages to groups and individuals.
- View a list of users within your organization.
- Follow or un-follow users.
- Join or leave groups.
- Comment on existing conversations.
- View complete conversation threads.

*Note - You cannot post files here, but you can download and view files posted on Salesforce.com from the Chatter Stack.*

To configure a Salesforce Chatter Stack, take the following steps:

1. From the Add Stack menu, click the **Chatter** icon.
2. From the Accounts drop-down menu, select the account to display.
3. Select the **Feed Refresh Rate**.
4. From the View fields, select the Personal Feed and Group Feed to display.



Chatter Stack Configuration





5. Using the slider, select the number of Posts per Page to display.
6. Click **Save and View Stack**.

## Rearranging Stacks




You might need to modify the order in which the Stacks appear in your Engagement Console. To rearrange the Engagement Console Stacks, take the following steps:

1. Hover beside the **X** at the top-right of any Stack. Two arrows will display that enable you to move the Stack in either direction.
2. Alternatively, click on the Doubled-up Stack icon in the Add Stack menu to re-order Stacks by dragging them.



*Move Stacks*

## Have questions? Contact us:

-  [www.salesforcemarketingcloud.com](http://www.salesforcemarketingcloud.com)  [marketingcloud@salesforce.com](mailto:marketingcloud@salesforce.com)
-  [@marketingcloud](https://twitter.com/marketingcloud)  1-888-672-3426

# REPLYING TO POSTS

## Twitter

You can Reply, Direct Message (DM), RePost, or Retweet any post pulled into the Engagement Console Stacks. Mouse over the bottom right hand corner of the post and select the appropriate button.

When you reply to a Tweet, the **@twitterhandle** will auto-populate. If you have registered more than one Twitter account, the default Twitter account appears first on the list. To choose another Twitter account, select it from the drop-down, or select File/Accounts to change the default.



*Reply, DM, RePost, or ReTweet*

## Profile

The Profile provides a description of the individual. If you see an interesting post or individual, you can investigate their social media profile by opening a Profile Stack.

To open a Profile Stack, click on the @twittername within a post or search for the individual in the Twitter Search. A new Stack that provides a 360-degree view of their online presence opens. This helps to give context to ongoing interactions.

A Profile within the Engagement Console consists of two tabs:

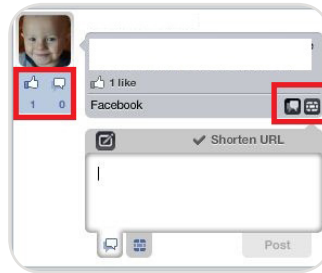
- The Radian6 tab displays source tags and any other notes applied to the person, displays conversation history and notes for that person. The Previous Conversation and Notes section goes back 7 days or 50 lines.
- The Twitter tab enables you to Follow or Unfollow people, shows the users's latest tweets, the number of updates and their Twitter biography. It also shows Location and Timezone, date they Joined, how many people are Following them, and how many people they Follow.

*Note - The Latest Posts information in the Profile Stack is a Twitter search on the specified Twitter handle.*

## Facebook

When a post from Facebook appears, you will see the number of likes (thumbs up icon) and comments (conversation bubble icon) beneath the profile picture.

Click on the Balloon icon at the bottom right hand corner of the post. You can Comment directly on the Status Update. Click on the Bricks icon to leave a Wall Post on the user's wall.



Facebook Posts

## Facebook Pages Stack

In the Facebook Pages Stack, you can see the Likes, Comments and Replies on each post. Right-click on the Facebook profile picture to like a post. Reply directly on the Fan Page wall by clicking on the Comment or Wall Post icon at the bottom of the post. Delete a post by clicking on the **X** icon.



Facebook Pages



## Chatter

In the Chatter Stack, you can view the likes and comments on a post. To comment on a post, click the Comment icon and insert your comment.



Chatter

## Have questions? Contact us:

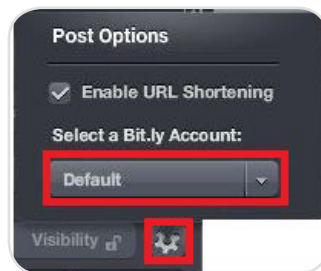
- [www.salesforcemarketingcloud.com](http://www.salesforcemarketingcloud.com)
- [marketingcloud@salesforce.com](mailto:marketingcloud@salesforce.com)
- [@marketingcloud](https://twitter.com/marketingcloud)
- [1-888-672-3426](tel:1-888-672-3426)

# CREATING POSTS

## Enable URL Shortening

You are able to use your integrated Bit.ly account when shortening links: please see Section 1.2 Log In to the Engagement Console. To use this account rather than the default account, take the following steps:

1. Click **New Post** or **New Tweet** at the bottom of the Stack.
2. The Posting Palette displays. Click the **Cog** icon.
3. From the Select a Bit.ly Account drop-down menu, select the desired Bit.ly account.



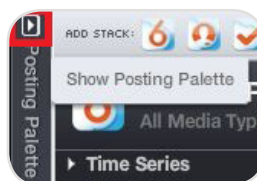
Bit.ly Account

## Posting Palette Overview

The Posting Palette enables you to post new content, send new Direct Messages (DM) and Reply to posts in an easy to use palette.

To expand and collapse the Posting Palette at any time, complete the following steps:

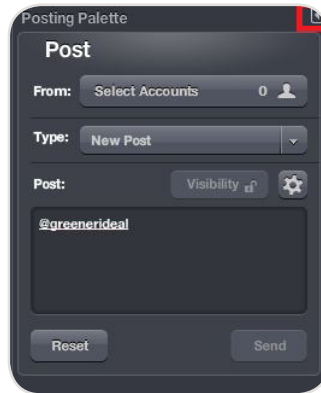
1. Click the **Show Posting Palette** button.



Show Posting Palette



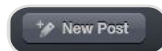
1. To collapse the Posting Palette area, click the **Collapse Posting Palette** button.



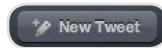
*Collapse Posting Palette*

## Create New Posts

The Posting Palette area enables you to create new content to send out to your followers and friends. You can send this new content from different social media accounts. You can access the Posting Palette by clicking on the New Post or New Tweet buttons at the bottom of each Stack.



*New Post button*



*New Tweet button*

To create new content from the Posting Palette, complete the following steps:

1. In the From drop-down menu, select the Accounts you wish to publish from.



Select Accounts

*Note - The number of Accounts selected will appear in the From drop-down.*

2. The Type drop-down will default to New Post.
3. Click **Visibility** to set the Location and Language of this post (optional).

*Note - Visibility will be available as an option when you only select a Facebook Page Account.*



Visibility

4. Click the **Post Options** cog to Enable URL Shortening and select a custom Bit.ly Account (optional).
5. In the Post field, insert content text and/or hyperlink. If you have inserted a hyperlink you can select from the available thumbnails (optional).
6. Click **Send**.

## Direct Message

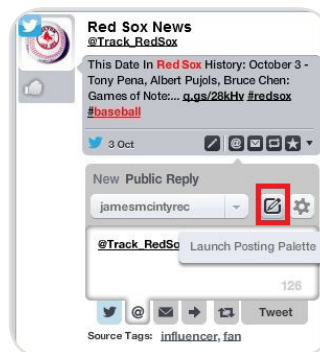
You can Direct Message (DM) an individual from the Posting Palette. To Direct Message someone you must have an established social media relationship, in that you must be following the individual and the individual must be following the Twitter handle you are Direct Messaging from.

Direct Messaging is only available in the Radian6 Topic Stack and Twitter Stack. To Direct Message, complete the following steps:

1. In the Radian6 Topic Stack or Twitter Stack, click the desired individual's social media icon.

*Note - You can only Direct Message one individual at a time.*

2. Click the **Launch Posting Palette** button.



*Launch Posting Palette*

3. The Posting Palette expands. In the From drop-down menu, select the Twitter Account(s) from which you wish to Direct Message.

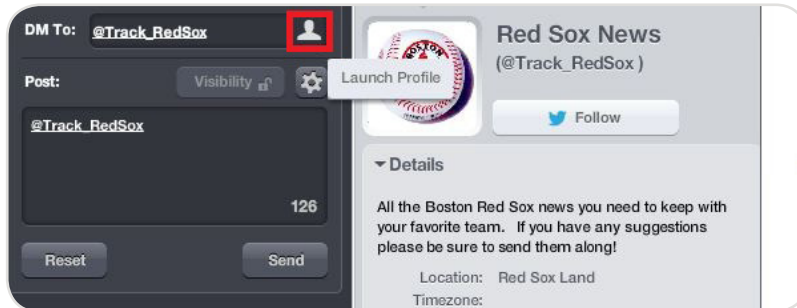


*From Drop Down Menu*

4. In the Type drop-down menu, select **DM**.



5. The DM To field appears. Insert the Twitter handle you wish to Direct Message.
6. To view the social media Profile of the individual, select the Launch Profile button (optional).



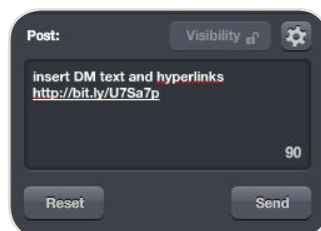
Launch Profile button

7. Click the **Post Options** cog to Enable URL Shortening and select a custom Bit.ly Account (optional).



Post Options

8. In the Post field, insert Direct Message text and/or hyperlink.



Post field

9. Click **Send**.

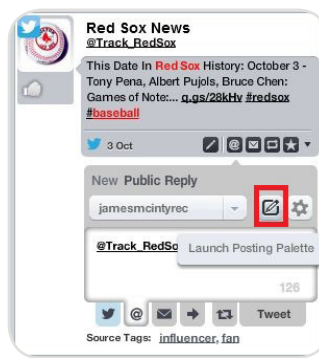
## Reply to Posts

You can Reply to an individual from the Posting Palette. Replies are only available in the Radian6 Topic Stack and Twitter Stack.

To Reply to an individual, complete the following steps:

1. In the Radian6 Topic Stack or Twitter Stack, click the desired individual's social media icon.
2. Click the **Launch Posting Palette** button.

*Note - You can only Reply to one individual at a time.*



*Launch Posting Palette*

3. The Posting Palette expands. In the From drop-down menu, select the Twitter Account(s) from which you wish to Reply.



*From Drop Down Menu*

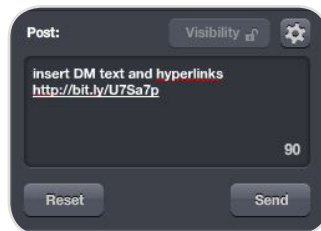


4. From the Type drop-down menu, select New Post.



Type Drop Down Menu

5. In the Post field, insert the text and/or hyperlink with which to Reply.



Post Field

6. Click **Send**.

## Clipboard

The Clipboard enables you to store commonly used responses and posts in the Posting Palette. You can reuse these common responses and messages easily.

To add text to the Clipboard, complete the following steps:

1. Click **New**. The Save commonly used text screen appears.
2. Insert desired text.
3. Click **Save**.

To re-use text from the Clipboard to post new content, complete the following steps:

1. In the Posting Palette, select the desired accounts.
2. Click the saved text in the Clipboard.
3. The text populates the Post field. Click **Send**.

## Have questions? Contact us:

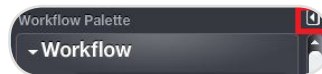
- [www.salesforcemarketingcloud.com](http://www.salesforcemarketingcloud.com)
- [marketingcloud@salesforce.com](mailto:marketingcloud@salesforce.com)
- [@marketingcloud](https://twitter.com/marketingcloud)
- 1-888-672-3426

# APPLYING WORKFLOW

## Workflow Overview

Workflow options in the Engagement Console are identical to those in the Radian6 Analysis Dashboard. They enable you to assign posts to team members for follow up, add Post Tags and Source Tags, set a Priority, define Engagement Level, define Sentiment and define Classification Level.

Workflow displays in the Workflow Palette on the left hand side of the Engagement Console. The Workflow Palette is a selection of options that make it easy to quickly assign workflow. The Workflow Palette collapses or expands when you click on the arrow in the upper right-hand corner. Collapsing the Workflow Palette provides more room in the Engagement Console to view additional Stacks.



Workflow Palette

The Workflow Palette is initially inactive when open. Workflow becomes active when you click on the display icon in a Radian6, Twitter Managed Account, Facebook Managed Account or MyTasks Stack, as shown below. The background of the selected post turns white instead of gray so that it stands out from the other posts.

*Note - Because Personal Twitter and Facebook Stacks are external to Radian6, you cannot use workflow engagement on posts within these Stacks.*



Display Icon

## Adding Notes

The first options in the Workflow Palette are for attaching Notes, Post Tags and Source Tags to a post. They provide details about the post and are visible to other members of your team.

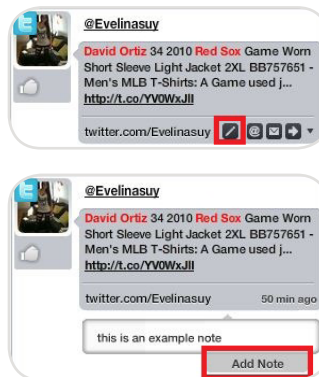


*Notes, Post tags and Source Tags*

A Note can be anything you want team members to know about. For example, you may have dealt with something similar before. There are two ways to attach a Note to a post:

### A. Within the post:

1. Select the post by clicking on the picture.
2. Select the Little Pencil that appears in the bottom right-hand corner.
3. Insert Note text.
4. Click **Add Note**.



*Add Note*

## B. Using the Workflow Palette:

1. Select the post by clicking on the picture.
2. Write something in the Note text field within the Workflow Palette.

*Note - As soon as you begin to type, a plus (+) sign appears on the right hand side of the field.*

3. Click on the plus (+) sign to apply the Note to the post.

*Note - The Note is hidden until it is added.*

## Adding Post Tags and Source Tags

Post and Source Tags are useful for classifying and retrieving posts in the future:

- **Post Tags** indicate discussion in a post, such as a question, a complaint or mention of a particular product.

You can type your own tag, or select one from the drop-down list of all the tags previously used in your environment. The list of available tags will appear as soon as you click in the Post Tag text field.

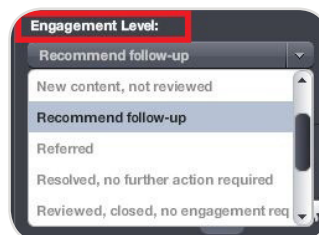
- **Source Tags** identify the source (the post's author). After a Source Tag is applied, it displays whenever a post from the tagged source appears.

For example, an author might be a fan of your company, or perhaps they work for a competitor. Applying the correct Source Tag will help your team understand who this person is and what role they might play in your social media efforts.

Together, notes and tags form an Audit Trail so, at a glance, you can see what actions occur with each post, when, and by whom.

## Engagement Level

The Engagement Level drop-down list includes labels describing what level of engagement or interaction your team has taken with the post. These levels are adjustable to your organization. Contact [marketingcloudsupport@salesforce.com](mailto:marketingcloudsupport@salesforce.com) to do so.



*Engagement Level*

Select the Engagement Level and it is applied to the bottom of the post. You cannot remove an Engagement Level once one has been added; however, you can change it as necessary.

## Setting Priority

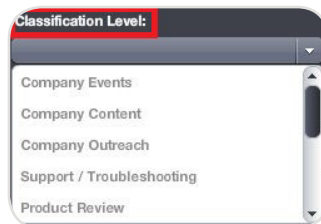
The Engagement Level also enables you to apply one of three priority settings to a post: Green for low priority, Yellow for medium, and Red for high. When a post is selected, select the Priority from the Workflow Palette. That Priority is applied underneath the post's display picture.



*Priority*

## Classification Level

The Classification Level drop-down list works in the same way as the Engagement Level list. Click on the Classification you feel is most appropriate from the list (such as product inquiry, or customer support issue). These levels are adjustable for your organization. Contact [marketingcloudsupport@salesforce.com](mailto:marketingcloudsupport@salesforce.com) to do so.



*Classification Level*

## Sentiment

Posts will receive an automated sentiment rating between positive and negative. You can change this by selecting the post and clicking on one of the Sentiment Icons within the Workflow Palette.



*Sentiment Ranking*

If you have more than one Topic Profile set up in the same Stack, multiple sentiment hands will appear. Mouse over a hand to see to which Topic Profile it refers.



*Roll Over Hands*

## Post Assignments

If you have applied any of the workflow options described above, the Engagement Console will assign the post to you and your display picture will appear in the upper right-hand corner of the post:



*Assigned*

To assign the post to someone else:

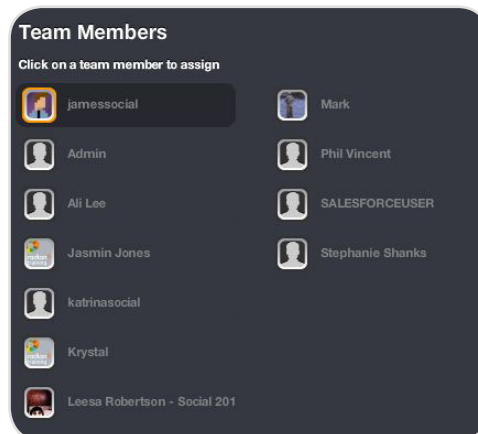
1. Click the text field beside Assigned in the Workflow Palette. A list of the other users in your environment will appear.
2. Select the desired user's name in the list, type it in the field or click on the **Pencil** icon to bring up the team menu window.



*Pencil Icon*

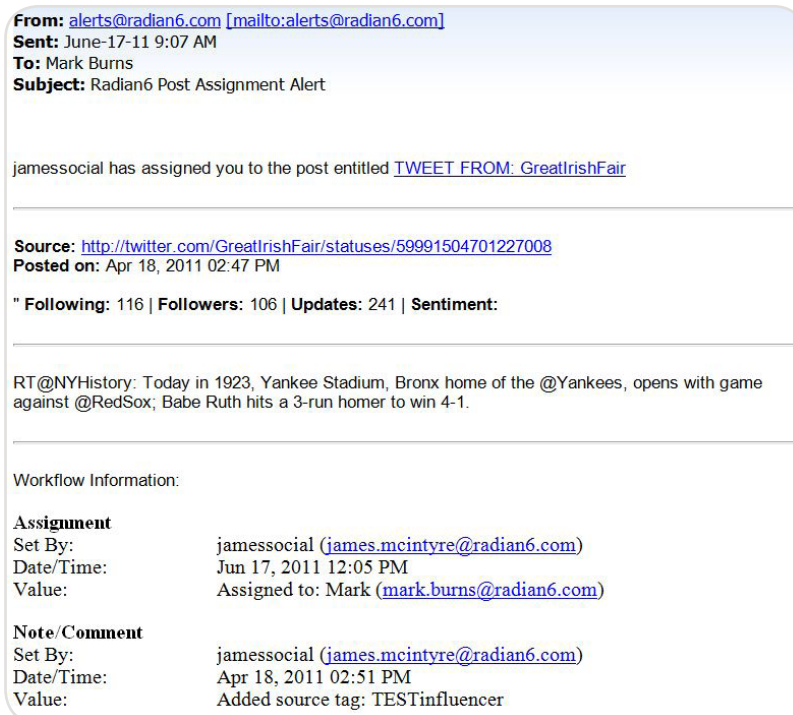


3. Select the desired user.



Team Members View

When a post is assigned to someone, it will appear in his or her My Tasks Stack. That person will also receive a Post Assignment Alert from alerts@radian6.com detailing Workflow information:



Workflow Email Notification



## Media Actions

Media actions are accessed by selecting the post in the Stack, so it highlights. Then right-click on the post. The actions available in the Media Actions drop-down list differ, depending on the media in which the post was created.

- Twitter post media actions include: View the User's Profile, Search Profile, Follow, Unfollow, Add to List, Block User, Unblock User, Retweet and Report Spam.
- Facebook posts are protected by Facebook privacy settings, so the options available are View User Profile, Launch Workflow and Launch Assign. If you are a friend of the user, you can also Like or Unlike the post.
- You can also View User Profile, Launch Workflow and Launch Assign for mainstream news, blogs, forum posts, etc.

## Deleting Posts





You can delete a post if you no longer want it to appear in your Engagement Console. To delete a post, take the following steps:

1. Select the desired post from the Stack, so it highlights.
2. Click on the **Mark Post as Deleted** option. When you Refresh the Stack, the post will be removed from the Stack and from the Topic Profile.

Mark Post as Deleted

Delete Post

## Have questions? Contact us:

-  [www.salesforcemarketingcloud.com](http://www.salesforcemarketingcloud.com)  [marketingcloud@salesforce.com](mailto:marketingcloud@salesforce.com)
-  @marketingcloud  1-888-672-3426

# CREATING MACROS

## Macros Overview

A Macro is a single button that can complete multiple workflow actions. It enables you to work more efficiently in the Engagement Console. Creating workflow for each post can be time consuming. If you are using the same configuration of settings repeatedly, it is more efficient to create a Macro. Not only is this a great time saver, it also provides a more uniform approach to how your team engages with posts.

### Creating a Macro

You can create as many Macros as you want. Create a Macro from the Workflow Palette (A) or through individual posts (B).

A. If you have not configured any engagement settings yet, start from the beginning:

1. Select a post within a Radian6 Topic Stack, Twitter Managed Account or My Tasks Stack. This will activate the Workflow Palette.
2. In the Workflow Palette under My Macros, click Create Macro to open the Macro configuration window. This contains all the setting options available in Workflow.
3. Name the Macro.
4. Modify Workflow settings as required.
5. Click **Save**.

Macro Name:

Share this macro ☐

☐ Change this Property

Note:

☐ Change this Property

Post Tags:

☐ Change this Property

Source Tags:

☐ Change this Property

☐ Mark Post as Deleted

☐ Change this Property

Assign to:

☐ Change this Property

Priority: ☐ ☐ ☐

☐ Change this Property

Engagement Level:

- ☐ Commented, awaiting reply
- ☐ Commented, closed
- ☐ New content, not reviewed
- ☐ Recommend follow-up
- ☐ Referred
- ☐ Resolved, no further action required
- ☐ Reviewed, closed, no engagement required
- ☐ Reviewed, determining best response
- ☐ Submitted as Case
- ☐ Submitted as Lead

☐ Change this Property

Sentiment: ☐ ☐ ☐ ☐ ☐

☐ Change this Property

Classification Level:

- ☐ Company Events
- ☐ Company Content
- ☐ Company Outreach
- ☐ Support / Troubleshooting
- ☐ Product Review
- ☐ General Product / Company Coverage
- ☐ Sales Lead
- ☐ Industry Discussion
- ☐ Recommendation / Referral
- ☐ Product Inquiry
- ☐ Other

Create a Macro

**B.** You can use the settings you have applied to a post to create a Macro:

1. Double-click on the post's display picture.
2. When the workflow dialogue box opens with the settings in place, click **Save as Macro**.

*Note - The Macro window appears enabling you to name it and edit the settings if desired.*

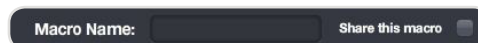
## Shared Macros

There are two types of Macros within the Engagement Console's Workflow Palette: My Macros and Shared Macros. My Macros are private and for your own use. Shared Macros are public and available for others in your environment to use.



*Types of Macros*

To share a Macro, click the Share this Macro option at the top of the Macro configuration window. The Macro is added to the Shared Macros list.



*Name and Share Macro*

Shared Macros with Public visibility will be stored on Radian6 servers, meaning you will be able to access these wherever you log in to the Engagement Console. You may also assign a Macro to a project group of users.



*Public and Project Macros*

## Editing and Deleting a Macro

To edit an existing Macro, take the following steps:

1. On the right of the Macro, click the Pencil icon.
2. Make required changes to Workflow settings.
3. Click **Save**.

*Note - You may also delete a Macro by selecting Delete.*

Macro Name: Social 2011

Share this macro ☒ for project: Public

☐ Change this Property

Note:

☒ Change this Property

Post Tags:

social2011

☐ Change this Property

Source Tags:

☐ Change this Property

☐ Mark Post as Deleted

☒ Change this Property

Assign to: Mark

☒ Change this Property

Priority: ☐ ☐ ☐

☐ Change this Property

Sentiment: ☐ ☐ ☐ ☐ ☐

☒ Change this Property

Engagement Level:

- ☐ Commented, awaiting reply
- ☐ Commented, closed
- ☐ New content, not reviewed
- ☐ Recommend follow-up
- ☐ Referred
- ☐ Resolved, no further action required
- ☐ Reviewed, closed, no engagement required
- ☐ Reviewed, determining best response
- ☐ Submitted as Case
- ☐ Submitted as Lead

☒ Change this Property

Classification Level:

- ☐ Company Events
- ☐ Company Content
- ☐ Company Outreach
- ☐ Support / Troubleshooting
- ☐ Product Review
- ☐ General Product / Company Coverage
- ☐ Sales Lead
- ☐ Industry Discussion
- ☐ Recommendation / Referral
- ☐ Product Inquiry
- ☐ Other

Edit an Existing Macro



## Applying a Macro

Macros can only be applied to posts within the Radian6 Topic, Twitter Managed Account and My Tasks Stacks. To apply a Macro, take the following steps:

*Note - Uninstalling your Engagement Console will delete any existing Macros!*

1. Click on the display picture of a post to highlight it.
2. From the Workflow Palette, click the desired Macro to apply it.

*Note: Whenever you click on a post in the Stack that contains a Macro, the Macro's configuration is shown in the Workflow Palette.*

You can also apply a Macro to multiple posts at once:

1. Click on the display picture.
2. Hold Shift to select a string of consecutive posts.
3. Select the Macro you would like to apply.

*Note - If you want to apply the Macro to several posts, but they are dispersed through the Stack, hold down Control and select each post, then select the Macro.*

## Macro Extensions

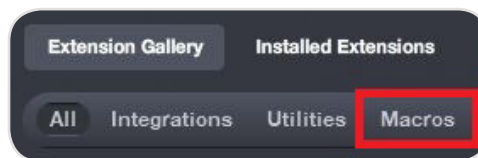
The Extension Gallery provides some pre-built applications that you can use in your Engagement Console. These applications save you from manually setting up these processes. To set up a Macro from the Extension Gallery:

1. Click the **Extension Gallery** icon.

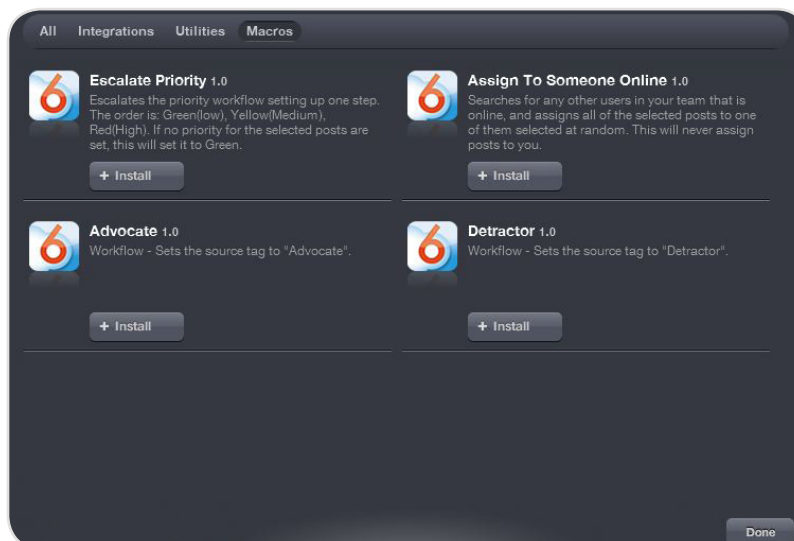


Extension Gallery Icon

2. Scroll down to use the Macros section or click the Macros selection button in the top right hand corner.



Macro Link

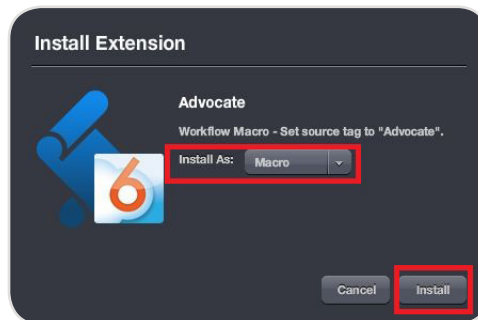


Available Macros

3. Choose the Macro you want to add and click **+ Install**.



4. Select the Macro option from the drop-down box.



Macro Install

The available options are:

### *Escalate Priority*

You can use this Macro to escalate the priority of any post. Click this Macro and it will automatically escalate to the next priority level.

### *Assign to Someone Online*

This Macro is useful for a small community team or full listening grid where all users are able to handle any posts. With one click, the post selected is assigned to an available online user.

### *Advocate/Detractor*

If you want to start building out a strategy that involves managing Advocates and Detractors of your brand, these Macros can help. Clicking one of these will add either the Advocate or Detractor source tag to the posts you have selected.

## Have questions? Contact us:

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 @marketingcloud    1-888-672-3426





# INSTALL EXTENSIONS

## Extension Gallery Overview

The Extension Gallery is a collection of tools that enable users to customize the Engagement Console to meet the specific needs of their team. It automates time-consuming, repetitive actions.

The Extension Gallery houses:

- **Integrations** - An Integration enables you to launch Stacks from Radian6, as well as third parties (such as Klout, Twitpic and Bit.ly).
- **Utilities** - A Utility is used to automate tasks (such as Email Selected Posts, Launch Twitter Conversations and Trending Topics).
- **Macros** - A Macro enables you to assign multiple workflow settings with one click (such as Escalate Priority, Advocate and Detractor).

## Set Up the Extension Gallery

To Set Up and access the Extension Gallery, take the following steps:

1. Ensure that your Engagement Console is up to date. Select **File** from the header menu.
2. Click **Check for Updates**.
3. Click the **Extension Gallery** icon.



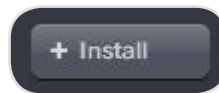
*Extension Gallery Button*

4. Navigate by shifting through the different types of Extension tabs in the top left hand corner.

## Install an Extension

To install an Extension, take the following steps:

1. Click the **+ Install** button.
2. Click **Install**.



Install Extension

3. To use the new Extension, click the new icon that is available in the Stacks Bar.

## Integrations

### Salesforce.com Add-in

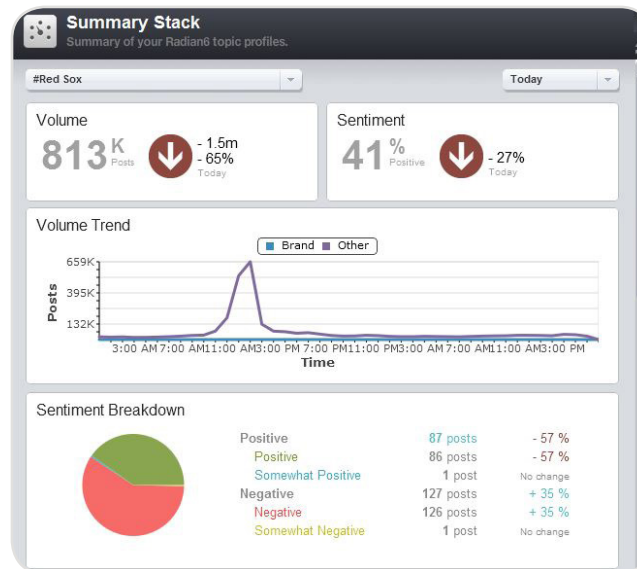
To use this Extension, you must have purchased the Social Hub with the Radian6 for Salesforce App. Installation of this Extension will enable you to manually create Cases, Leads and Contacts.



Salesforce.com Add-in

## Summary Stack

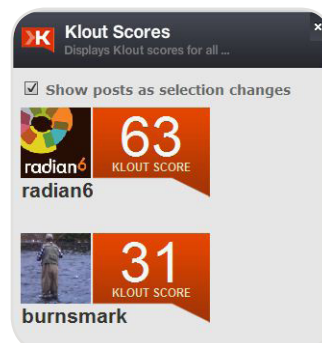
The Summary Stack adds a Create Stack icon. Clicking the Create Stack icon launches a Summary Stack showing information from the Summary Dashboard for the chosen Topic Profile.



Summary Stack

## Klout Scores

Klout Score measures influence based on your ability to drive action. Every time you create content or engage you influence others. After you have installed the Klout Scores Integration, you will be able to see the Klout scores specific to any users associated with a Twitter post.



Klout Scores

## Bit.ly URL Shortener

Bit.ly is a utility that enables users to shorten a long URL, share it, and then track the resulting usage.

Once you have installed the Bit.ly URL Shortener Integration you will be able to launch the Bit.ly web application from your Engagement Console. This will enable you to log in to your own Bit.ly account. You will have access to your own Bit.ly account including pro accounts with custom URLs.

To set up the Bit.ly URL Shortener, take the following steps:

1. Launch the Bit.ly URL Shortener application.
2. Sign in with your Bit.ly credentials.
3. Select the drop-down menu under your Bit.ly Login Name.
4. Select **Tools**.
5. Click the link to the Bit.ly URL Shorter. The Bit.ly URL Shorter will load in your Engagement Console.

## Bit.ly Stats

Bit.ly Stats will enable you to see stats around a specific bit.ly link. It provides important information around your Bit.ly link (such as Number of Clicks, Referrals Details and Locations Details).

With integration, you are able to track your own links and their growth over time. When you have installed this Integration, you will see the Bit.ly icon beside each Radian6 Twitter post that has a Bit.ly link within it.



Bit.ly Icon

Clicking on this icon will open up a new Stack showing the stats for that link.

## Twitpic

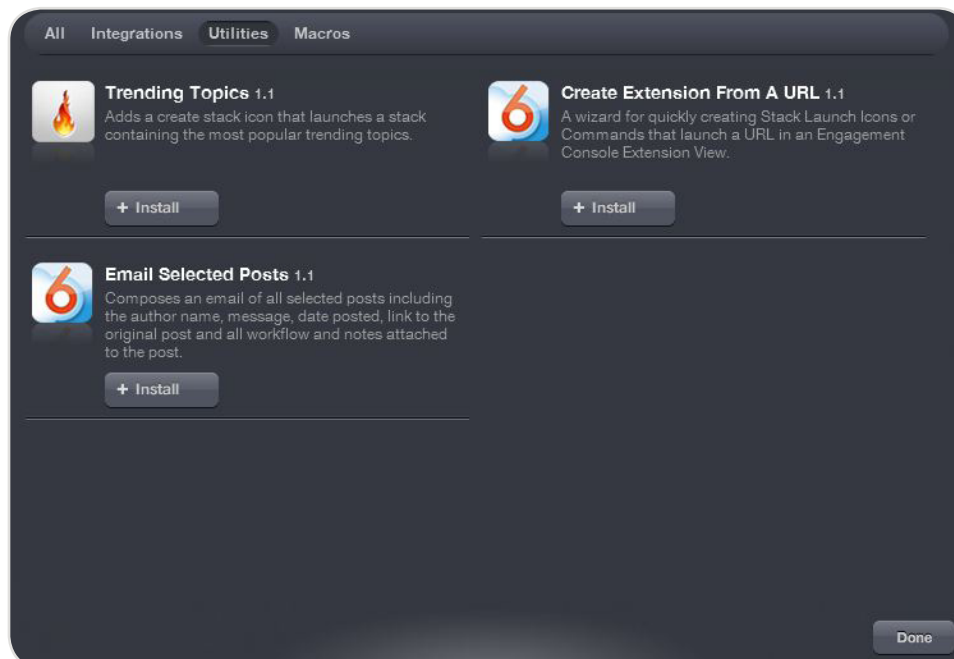
The Twitpic Integration enables you to use your own personal Twitpic account in the Engagement Console. This is a great option for sending out corporate tweets with your pictures embedded.

## Utility Extension

The Utility Extension helps make everyday tasks like looking at a specific browser page, looking at specific Twitter conversations or emailing relevant posts much easier. It enables you to perform all these functions from inside your Engagement Console.

You access this section using the Extension Gallery button in the Engagement Console.

- In the **Extension Gallery** you can either scroll down to the Utilities section or select Utilities in the upper right hand corner.
- In the Utilities section, you are presented with the six available Utilities.



Extensions Gallery - Utilities

## Trending Topics

The Trending Topics Extension will enable you to build an additional Stack within the Engagement Console. This Stack displays the most discussed topics within your selected Topic Profile.

To install the Trending Topics Extension, take the following steps:

1. In Extension Gallery Utility section, click **Trending Topics**.
2. Click **Install Extension**.

3. Click **Install**.



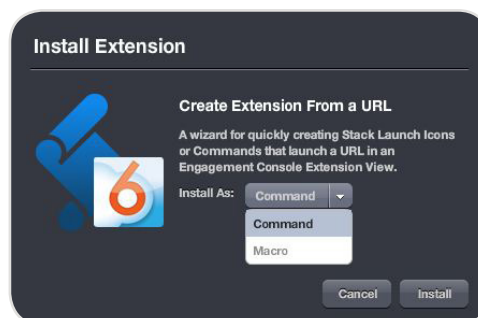
*Install Extension*

4. To launch Topic Profile Trends, click **Done**.

### Create an Extension from a URL

You can create custom Stacks for specific URLs. This enables you to keep a particular website open that you need to monitor inside the Engagement Console. You can add this Utility as a command or Macro. To install, take the following steps:

1. In the Extension Gallery Utility section, select **Create an Extension from a URL**.
2. Click **Install Extension**.
3. In the Install As drop-down, choose to install the extension as a Macro or as a Command.

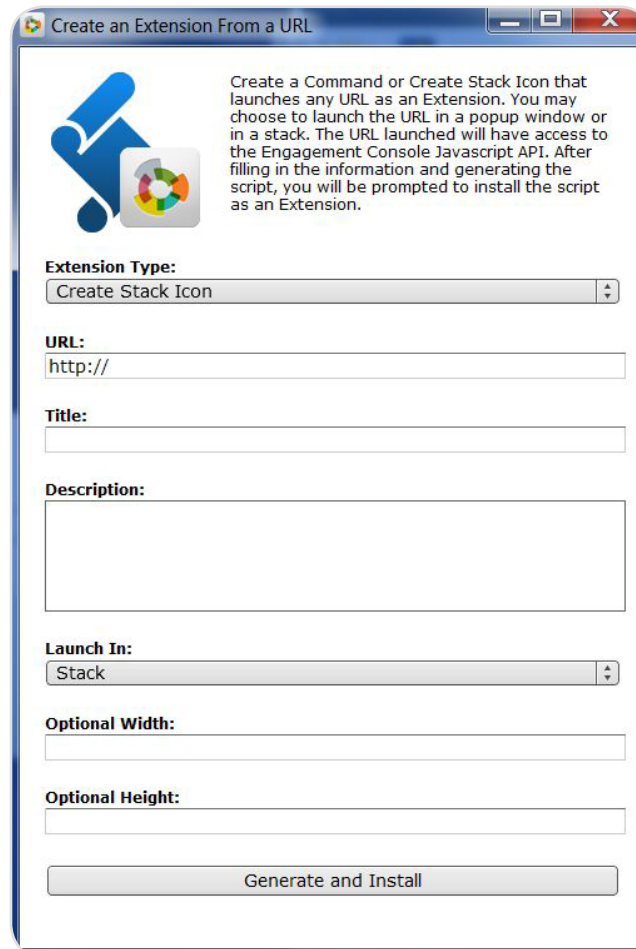


*Install Extension from a URL*

*Note - By Selecting Install as Macro the Utility Extension will appear under the My Macros section. While selecting Install as Command the Utility Extension will appear in the Command Menu.*

- Launch the Extension from URL Utility and fill in the required information, including the URL that you wish to launch within the Engagement Console.

*Note: Optional - You can also enter the Stack size to which you would like the new Stack to default.*



Create an Extension From a URL

Create a Command or Create Stack Icon that launches any URL as an Extension. You may choose to launch the URL in a popup window or in a stack. The URL launched will have access to the Engagement Console Javascript API. After filling in the information and generating the script, you will be prompted to install the script as an Extension.

**Extension Type:**  
Create Stack Icon

**URL:**  
http://

**Title:**

**Description:**

**Launch In:**  
Stack

**Optional Width:**

**Optional Height:**

Generate and Install

- When the required information is complete, click **Generate and Install**.
- From the Add Stack menu, click the newly produced icon.



Icon



## Email Selected Posts

With the Email Selected Posts utility, you can email the text of one or more posts to someone outside the Engagement Console.

To use Email Selected Posts, take the following steps:

1. In the Extension Gallery Utility section, install Email Selected Posts as a Command or as a Macro.
2. Select the posts you want to email by clicking the icon in the post.
3. Select **Email Selected Posts** from the Commands Menu or from My Macros. All selected posts are placed in an email which you can address, title and send.

## Have questions? Contact us:

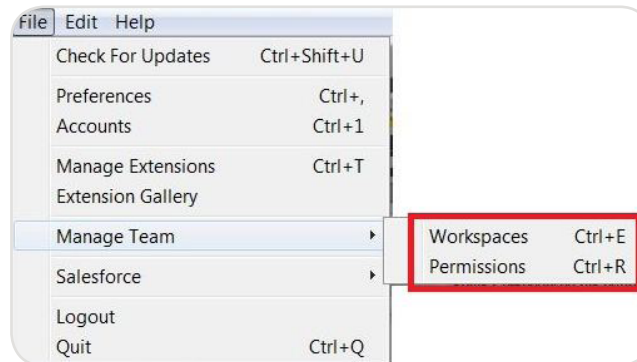
 [www.salesforcemarketingcloud.com](http://www.salesforcemarketingcloud.com)     [marketingcloud@salesforce.com](mailto:marketingcloud@salesforce.com)  
 [@marketingcloud](https://twitter.com/marketingcloud)     1-888-672-3426



# CONFIGURE WORKSPACES AND PERMISSIONS

## Manage Teams Overview

If you are a Super User, you will have a Manage Team option under the File menu. Here you will find the options for Workspaces and Permissions.



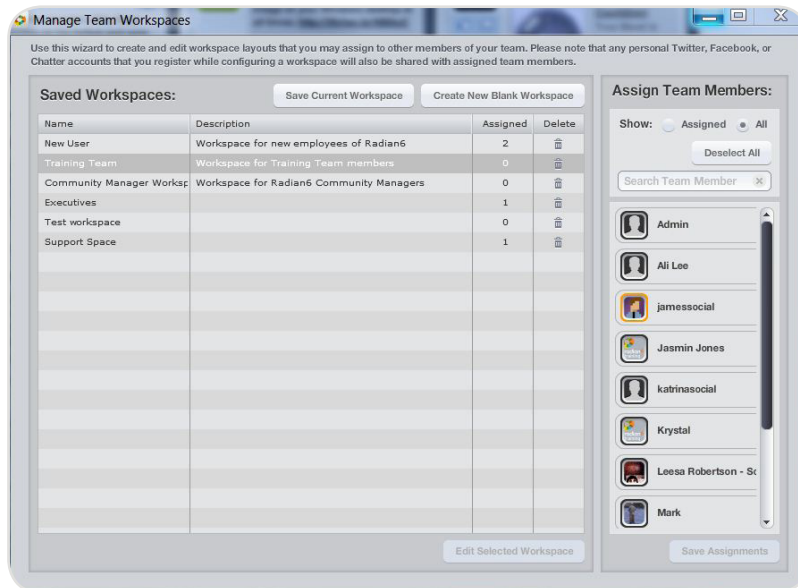
Open Workspaces and Permissions

## Workspaces

A Workspace is a predefined layout that enables you to control which Stacks a user can see when they log into their Engagement Console. You can control what users within your environment are able to access when logged in.

To edit an existing Workspace, take the following steps:

1. From the Engagement Console header menu, select **File** (Radian6 Engagement Console on a Mac).
2. Click the **Workspace** option. The Manage Team Workspaces screen displays. The Workspaces pop-up window displays the Workspaces available to you.



Workspace Pop-up Window

3. Assign users to existing Workspaces from the list of available team members.

To create a new Workspace:

1. Click **Create New Blank Workspace**.

**Create New Team Workspace**

Enter a Name and Description (optional). Click Save to create the Team Workspace. This will log you out of the Engagement Console and allow you to edit the new Team Workspace after login.

Workspace Name:

Workspace Description:

Save Cancel

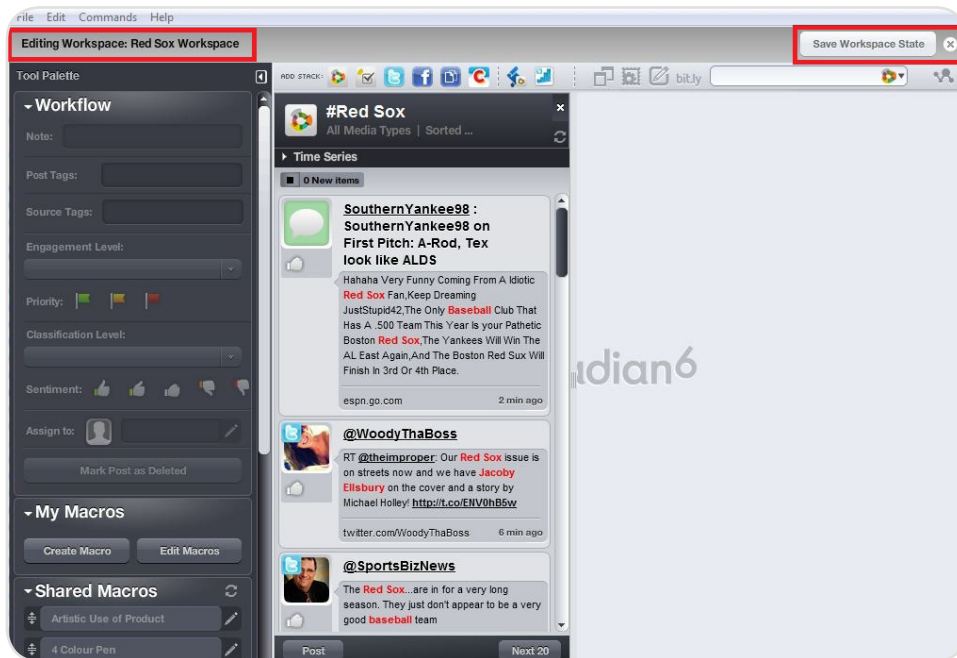
Workspace Name and Description

2. In the appropriate fields, enter a Name and Description for the workspace.
3. Click **Save**. The Engagement Console will log you out when you save the workspace. Once you log back into the Engagement Console, you can begin to edit the layout of the new workspace.
4. Only build the Stacks you want contained in the workspace.
5. Assign users to the workspace.

*Note - Setting up a pre-defined Workspace lets your users know which Stacks are the most important for them to monitor.*

6. Click **Save Workspace State**.

*Note - Notice the Editing Workspace: Community and Save Workspace State notifications that appear while in this editing mode.*



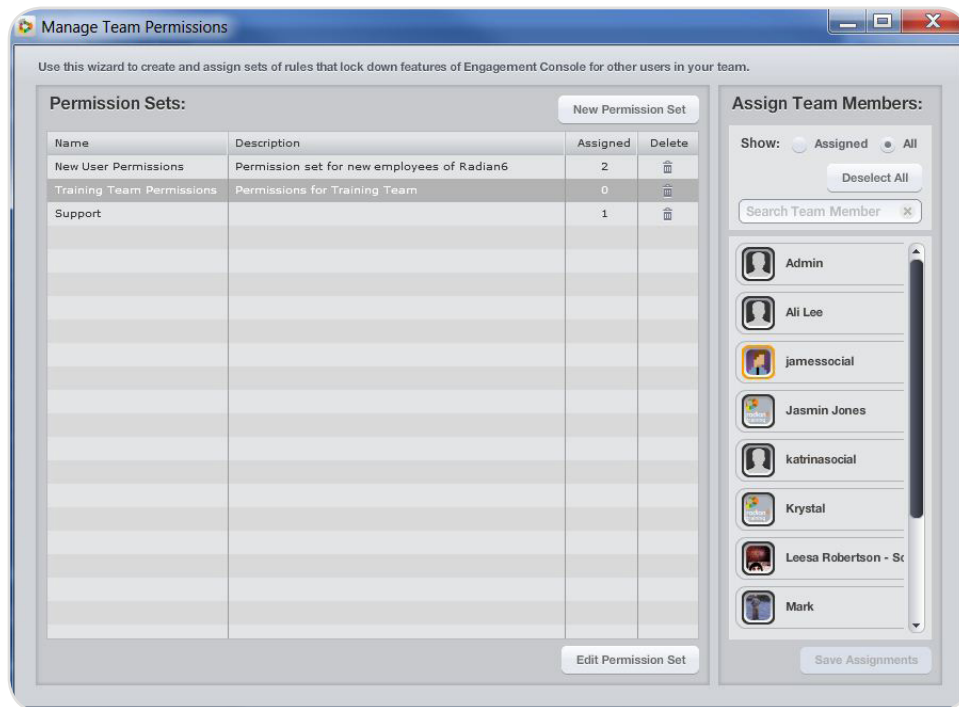
Building a Workspace

## Permissions

Permissions are different sets of rules that you can apply to user accounts. You can give or take away Permissions to access certain features of the platform.

To set up a Permission, take the following steps:

1. From the Engagement Console header menu, click **File**.
2. Click **Permissions**. The Manage Team Permissions pop-up window appears.



Manage Team Permissions Pop-Up

You can create different permission sets for different users, such as:

- Allowing or disallowing the creation of Stacks.
- Blocking people from responding from the console via Twitter.

To modify existing Permissions:

1. Select **Permission**.
2. Click **Edit Permission Set**.
3. Select Permissions to include by clicking the appropriate check box or deselecting permissions to exclude.

To create a new Permission:

1. Click **New Permission Set**.
2. Insert Name and Description.
3. Deselect Permissions you wish to exclude.
4. Select **Save Permission Set**.

Use this wizard to create permission sets to be assigned to team members.

Name:  Description:

**General Permissions**

- ☒ Allow Account Add/Remove
- ☒ Allow Stack Add/Remove
- ☒ Allow Stack Modifications
- ☒ Allow Posts
- ☐ Show Workflow
- ☐ Show Macros
- ☐ Allow Macro Create
- ☐ Allow Macro Edit
- ☐ Allow Macro Delete
- ☐ Show Shared Macros
- ☒ Allow Extensions Installation
- ☒ Show Media Actions
- ☒ Show Launch Dashboard
- ☒ Show Extensions
- ☐ Show Gallery
- ☒ Show Preferences

Stack Type:  Permission:

Stack Type	Permission	Value	
Facebook	Allow Account Add/Remove	<input checked="" type="radio"/> Yes <input type="radio"/> No	

<<

Manage Permissions

## Exception

An Exception enables you to change or modify a Permission set. To create an Exception:

1. Access an existing Permission.
2. Click **Edit Permission Set**.
3. Choose the Stack Type for which you wish to add an Exception.
4. Select the Permission you wish to modify.
5. Click **Add Exception**.
6. Select the Value you wish to apply (Yes or No).
7. Click **Save Permission Set**.

Exception List

Stack Type	Permission	Value	
Salesforce Chatter	Allow Account Add/Remove	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Twitter	Allow Account Add/Remove	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Twitter	Allow Direct Messaging	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Facebook	Allow Account Add/Remove	<input checked="" type="radio"/> Yes <input type="radio"/> No	

<< **Save Permission Set**

Exceptions

Have questions? Contact us:

[www.salesforcemarketingcloud.com](http://www.salesforcemarketingcloud.com)
[marketingcloud@salesforce.com](mailto:marketingcloud@salesforce.com)  
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[1-888-672-3426](tel:1-888-672-3426)