Salesforce ExactTarget Marketing Cloud

Radian6 Mobile User Guide

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Table of Contents

Get Started

Salesforce Radian6 Mobile Overview

If you are an existing Radian6 user, you can download the Salesforce Radian6 Mobile app for free at the iTunes App store.

The app is available for the Apple iPhone and iPad. It contains the following key functionality:

- A **Quick Search**, where you can rapidly set up a search for a topic of interest.
- **Engagement Stacks**, which contain posts brought in by your Radian6 Topic Profiles. You can apply workflow and engage with your community directly from the app.
- **Summary Stacks**, which contain high-level information about your brand, volume of posts on social media, sentiment, share of conversation and more.
- **Managed Account stacks**, which contain posts for your Twitter or Facebook managed accounts.

Download the Radian6 Mobile App

To download the Radian6 Mobile app, complete the following steps:

1. Visit the iTunes App Store on your computer or directly on your iPhone or iPad.
2. Use the search function to look for Radian6.
3. Select **Install**. The application will then install on your mobile device.

Note: There is no additional fee to download; however, you will need your Radian6 credentials to access your information.

Log In to Radian6 Mobile

To log in to the app, complete the following steps:

1. Select the Radian6 icon on your iPhone or iPad.
2. In the Login Screen, enter your Radian6 **Username** and **Password**.
3. Click **Log In**.

Set up a Quick Search

When you first log in to the Radian6 Mobile app, you can set up a **Quick Search**. This is a search across all monitored social media sources for any keywords you specify. You do not have to have a Topic Profile set up to start monitoring in this way. If you do have a Topic Profile set up, the keywords you enter do not have to be in the Topic Profile.

To set up a quick search, complete the following steps:

1. Click in the **Enter Keywords** field and type a word. You can search in more depth by using Boolean operators:

   • **OR**: "Radian6 OR Training" would bring back conversations around either of these search terms.
   • **AND**: "Radian6 AND Training" would bring back conversations that mention both of these search terms.
   • **NOT**: "Radian6 NOT Training" would bring back conversations that mention Radian6 but not training.
   • Brackets: "(Radian6 AND Training) NOT classroom" would bring back conversations that mention Radian6 and training but do not include the word classroom.

   Note: You do not have to type the Boolean characters in upper case for them to be recognized. Instead of typing AND, you can use a space or a comma.
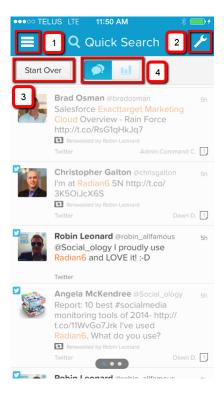

2. Click **Search**.
3. A **Quick Search** stack displays containing posts matching your search.

Navigate the Quick Search

There are several options available to you from your Quick Search stack view.
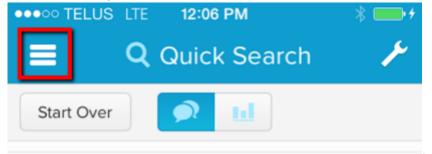

1. **Menu options**. Click this icon to add stacks, manage your open stacks, manage your accounts, or post to Twitter and Facebook.
2. **Refine search**: Click the wrench icon to refine your search. You can change the search terms, media types, languages, or regions.
3. **Start Over**: Click this button to start a new Quick Search. This will remove your existing stack.
4. **Posts/Summary** view: Toggle between these buttons to view the actual posts or a Summary of activity on your search terms in the past 7 days. The Summary shows volume, sentiment, top phrases used in posts, volume trends, top countries and top languages.

Note: When you log out of the Radian6 Mobile app after setting up a Quick Search, the column for that search will load automatically the next time you log in.

Manage Accounts

After setting up your Quick Search, access the Menu to view your social accounts and add new ones. The Menu icon is located on the top left of the screen.

On the Menu screen, select **Accounts** to add and manage personal Twitter accounts and Salesforce accounts. You will also be able to view managed Twitter accounts configured for your Radian6 account. A managed account is one that can be shared with other team members. Posts coming into your managed accounts can be viewed on a stack and have workflow applied to them.

Add a Personal Twitter Account

Adding a personal Twitter account will enable you to send Tweets and engage with posts directly from your personal account.

To add a Twitter account, complete the following steps:

1. Select the Menu icon.
2. Select **Accounts**.
3. Select **Twitter**.
4. A new screen displays, listing all Twitter Managed Accounts. Under **Personal Accounts**, select **Add Personal Account**.
5. In the Twitter Info screen, type your *Username* and *Password*, then click **Authorize App**.
6. Check that your account is listed under **Personal Accounts**.

Add a Salesforce Account

You can add one or more Salesforce accounts into the app. You will then be able to push cases and contacts into Salesforce as long as the posts are not older than 7 days.

To add a Salesforce account, complete the following steps:

1. Select the Menu icon.
2. Tap **Accounts**.
3. Select **Salesforce**.
4. Tap **Add Salesforce Account**.
5. In the **Salesforce** Info screen, insert your *User Name* and *Password*.
6. Tap **Log in to Salesforce**.

Note: You might receive a notice that a verification code is required. If so, you will receive an email with the required code. Enter that into the appropriate field.

7. The **Salesforce Info Thank You** screen displays. Click **Back to Salesforce**.
8. Click **Done**.

Set Up Radian6 Stacks

When you want to look at the results coming in for a specific Radian6 Topic Profile, you will need to set up an Engagement Stack, a Summary Stack, or a My Tasks stack.

To add and manage stacks (as well as perform other administrative functions) tap the **Menu** icon.

The following Menu items are available:

- Add a Stack
- Manage Stacks
- Accounts
- About the App
- Send a Tweet
- Post to Facebook Page
- Log Out

Add a Stack
When you select to **Add a Stack**, the following options display:

- **Engagement**: Select this to create an Engagement Stack. This is a standard Radian6 Stack, displaying posts from a selected Topic Profile configured in Radian6.
- **Summary**: Select this to create a Summary Stack. This will provide you with the same view as seen in the Summary Dashboard.
- **My Tasks**: Select this to create a My Tasks Stack. This shows all posts that have been assigned to you.
- **Twitter Managed Account**: Select this to create a Twitter Managed Account Stack. This enables you to respond from a shared or private Twitter account. It also enables you to apply workflow to process incoming posts.
- **Facebook Managed Account**: Select this to create a Facebook Managed Account Stack. This enables you to respond from a shared or private Facebook account. It also enables you to apply workflow to process incoming comments and posts on your Facebook page.

Set Up an Engagement Stack
To set up an Engagement Stack, take the following steps:

1. In the **Menu** screen, select **Add a Stack**.
2. Select **Engagement**.
3. In the **Name your Engagement Stack:** field, type a name and tap **Done**.
4. In the **Associated Topic Profiles** field, tap the green plus icon. A list of available Topic Profiles displays.
5. Scroll through the list and tap the required Topic Profile.

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6. Under **ADVANCED SETTINGS**, in the **Keyword Groups** field, the default setting is to search through **All** keyword groups. To specify specific Keyword Groups, tap **All**. The **Flter Groups** screen displays. Select or deselect Keyword Groups, then tap **Back**.
7. The default in the **Time Based** Options field is **Real Time**. To specify a date range to monitor, tap **Real Time** and select **Specify Date Range**. Scroll through the calendar to select the **Start Date** and click **Done**. Scroll through the calendar to select the **End Date** and click **Done**.
8. The default setting for **Sorting Options** is **Sort by Published Date**. You can tap this option to select to sort by **Received Date**.
9. If you are monitoring posts brought in by your Topic Profile in real time, an option displays for the **Refresh Rate**. The default setting is for posts to be refreshed every **1 Minute**. Tap this option to select one of the following options:
    a. Manual Refresh Only
    b. 30 Seconds
    c. 1 Minute
    d. 5 Minutes
    e. 10 Minutes
10. Select for **Auto Add Posts** to be on or off.
11. Select for **Show Deleted Items & Spam** to be on or off.
12. The default setting for the **Media Types** field is **All**. To select to view posts from specific media sources, tap **All** and select from the list of available options that displays.
Note: You cannot add media sources that were not selected in the original Topic Profile configuration.
13. Tap **Add New Filter** field if you want to display only one of the following types of post:
    a. **Open Assigned**: Posts that have been assigned to your team but have not been marked as closed.
    b. **My Tasks**: Posts assigned to you that meet your Stack specifications.
    c. **Assigned To User** (select the user from the list that displays under the refreshed settings): Posts assigned to the selected user.
    d. **Unassigned**: Posts that have not been assigned to a user.
    e. **Post Tag/Queue**: Posts that have been assigned the specified Post Tag.
    f. **Source Tag**: Posts that have been assigned the specified Source Tag.
    g. **Positive Sentiment**: Posts with a positive sentiment.
    h. **Negative Sentiment**: Posts with a negative sentiment.
*Note: You can combine different filters together by tapping **Add New Filter** again.*
14. If you want to filter your Topic Profile results by a specific Keyword or phrase, tap the **Keyword Filter** field, and type the word or phrase. Click **Done**.
15. Review your settings and click **Save**.

Set Up a Summary Stack

Note: To set up a Summary Stack, you must have a Topic Profile configured in Radian6 with brand, industry, or competitor group types. You must also have a sentiment subject specified in your Topic Profile.

To configure a Summary Stack, complete the following steps:

1. In the **Menu** screen, select **Add a Stack**.
2. In the **Add a Stack** screen, tap **Summary**.

3. In the **Name your Summary Stack:** field, type a name and click **Done**.
4. In the **Associated Topic Profiles** field, tap the green plus icon. A list of available Topic Profiles displays.
5. Scroll through the list and tap the required Topic Profile.
6. Under **Summary Stack Options**, the default Time Period is Today. Tap to select from the available options:
   a. Today
   b. 1 Week
   c. 2 Weeks
   d. 1 Month
   e. 3 Months
7. Click **Save**. The Summary Stack displays.
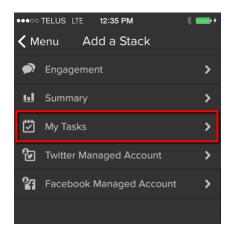

Set up a My Tasks Stack

When you are on the go, this is the place to check in with posts that your team is sending your way.

To add a My Tasks Stack, complete the following steps:

1. In the **Menu** screen, select **Add a Stack**.
2. In the **Add a Stack** screen, tap **My Tasks**.

3. In the **Name your my Tasks Stack:** field, type a name and click **Done**.
4. In the **Associated Topic Profiles** field, tap the green plus icon. A list of available Topic Profiles displays.
5. Scroll through the list and tap the required Topic Profile.
6. Under **ADVANCED SETTINGS (Optional)**, in the **Keyword Groups** field, the default setting is to search through **All** keyword groups. To specify specific Keyword Groups, tap **All**. The **Flter Groups** screen displays. Select or deselect Keyword Groups, then click **Back**.

7. The default setting for **Sorting Options** is **Sort by Published Date**. You can tap this option to select to sort by **Received Date**.
8. The default setting for the **Refresh Rate** of the Stack is for posts to be refreshed every **1 Minute**. Tap this option to select one of the following options:
   a. Manual Refresh Only
   b. 30 Seconds

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c. 1 Minute
d. 5 Minutes
e. 10 Minutes

9. Select for **Auto Add Posts** to be on or off.
10. Select for **Show Deleted Items & Spam** to be on or off.
11. The default setting for the **Media Types** field is **All**. To select to view posts from specific media sources, tap **All** and select from the list of available options that displays.

Note: You cannot add media sources that were not selected in the original Topic Profile configuration.

12. The default for **Filter By** is **My Tasks**. From the **Add New Filter** field, you can filter your Stack to display the following additional posts:
    a. **Post Tag/Queue**: Displays all posts that have been assigned a Post Tag you specify from a secondary drop-down menu.
    b. **Source Tag**: Displays all posts that have been assigned a Source Tag you specify from a secondary drop-down menu.

Note: You can combine different filters together by clicking **Add Filter** again.

13. In the **Highlight Keyword** field, type a term or phrase to search if you want to have that specific word or phrase highlighted in your Stack posts.
14. Click **Save**.

Set up a Twitter Managed Account Stack

A Managed Account Stack will bring in posts from a company Twitter or Facebook account. You must have an account registered in Radian6 to create this stack.

To set up a Twitter Managed Account Stack, complete the following steps:

1. In the **Menu** screen, select **Add a Stack**.
2. In the **Add a Stack** screen, tap **Twitter Managed Account**.
3. In the **Name your Managed Account Stack:** field, type a name and tap **Done**.
4. In the **Associated Managed Account** field, tap the green plus icon. A list of available Managed Accounts displays.
5. Scroll through the list and tap the required Managed Account.
6. Under **ADVANCED SETTINGS (Optional)**, in the **Time Based** Options field, the default is **Real Time**. To specify a date range to monitor, tap **Real Time** and select **Specify Date Range**. Scroll through the calendar to select the **Start Date** and click **Done**. Scroll through the calendar to select the **End Date** and click **Done**.

Note: The earliest start date is one month previous to the current date.

7. If you are monitoring posts in real time, an option displays for the **Refresh Rate**. The default setting is for posts to be refreshed every **1 Minute**. Tap this option to select one of the following options:
    a. Manual Refresh Only
    b. 30 Seconds

     c.   1 Minute

     d.   5 Minutes

     e.   10 Minutes

8. Select for **Show Deleted Items & Spam** to be on or off.

9. The default setting for the **Media Types** field is **All**. To select to view posts from specific media sources, tap **All** and select from the list of available options that displays.

Note: You cannot add media sources that were not selected in the original Topic Profile configuration.

10. Tap **Add New Filter** if you want to display only one of the following types of post:

     a.   **Unassigned**: Posts that have not been assigned to a user.

     b.   **Post Tag/Queue**: Posts that have been assigned the specified Post Tag.

     c.   **Source Tag**: Posts that have been assigned the specified Source Tag.

*Note: You can combine different filters together by tapping **Add New Filter** again.*

11. If you want to filter your results by a specific Keyword or phrase, tap **Keyword Filter**, and type the word or phrase. Click **Done**.

12. Review your settings and click **Save**.

Set up a Facebook Managed Account Stack

To set up a Facebook Managed Account Stack, complete the following steps:

1. In the **Menu** screen, select **Add a Stack**.

2. In the **Add a Stack** screen, tap **Facebook Managed Account**.

3. In the **Name your Managed Account Stack:** field, type a name and tap **Done**.

4. In the **Associated Managed Account** field, tap the green plus icon. A list of available Managed Accounts displays.

5. Scroll through the list and tap the required Managed Account.

6. Under **ADVANCED SETTINGS (Optional)**, in the **Time Based** Options field, the default is **Real Time**. To specify a date range to monitor, tap **Real Time** and select **Specify Date Range**. Scroll through the calendar to select the **Start Date** and click **Done**. Scroll through the calendar to select the **End Date** and click **Done**.

Note: The earliest start date is one month previous to the current date.

7. If you are monitoring posts in real time, an option displays for the **Refresh Rate**. The default setting is for posts to be refreshed every **1 Minute**. Tap this option to select one of the following options:

     a.   Manual Refresh Only

     b.   30 Seconds

     c.   1 Minute

     d.   5 Minutes

     e.   10 Minutes

- Select for **Auto Add Posts** to be on or off.

- Select for **Show Deleted Items & Spam** to be on or off.

- The default setting for the **Media Types** field is All. To select to view posts from specific media sources, tap **All** and select from the list of available options that displays.

Note: You cannot add media sources that were not selected in the original Topic Profile configuration.

8. Tap **Add New Filter** if you want to display only one of the following types of post:

     a.   **Unassigned**: Posts that have not been assigned to a user.

     b.   **Post Tag/Queue**: Posts that have been assigned the specified Post Tag.

*Note: You can combine the two filters together by tapping **Add New Filter** again.*

9. If you want to filter your results by a specific Keyword or phrase, tap the **Keyword Filter** field, and type the word or phrase. Click **Done**.
10. Review your settings and click **Save**.

Manage Stacks

To navigate between the stacks you have set up, use one of the following methods:

*   Simply swipe left or right to move to the next stack in that direction.
*   Use the pinch gesture on a stack to shrink it. You can then use the Carousel view to scroll through your stacks. To open another stack, simply tap it.

Edit a Stack

If you want to change the settings on one of your stacks, complete the following steps:

1. Navigate to the stack you would like to edit.
2. Click the wrench icon at the top of the Stack.
3. Change your desired configuration options.
4. Click **Save**.

Delete Stacks

To delete stacks, complete the following steps:

1. In the top left of the stack, select the **Menu** icon.
2. Click **Manage Stacks**.The Manage Stacks screen displays a list of all stacks you have open.
3. In the **Manage Stacks** screen, click the red dash symbol next to the stack you would like to delete.
4. Confirm by clicking **Delete**.
5. Repeat for all stacks you wish to delete.

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Apply Workflow

When you look through your stacks, you might find a post that you want to tag, add a note to, or recommend for action in some way. In the Radian6 Mobile app, you can apply a variety of workflow options:

- **Respond:** Reply directly to the post in the same media source it was created.
- **Assign priority setting**: Available settings are low priority, medium priority, and high priority.
- **Adjust the automated senitiment rating**: Options are negative, somewhat negative, neutral, somewhat positive, or positive.
- **Assignment**: You can assign the post to anyone in your Radian6 environment.
- **Add a Post Tag**: Post tags indicate the type of conversation in a post, such as a question, a complaint or a mention of a particular product. You can create new tags or use existing ones.
- **Apply a Source T**ag: Source tags identify the source (the post's author). After a source tag applies, it will display whenever a post appears from that specific source again.
- **Specify Engagement Status**: Select from labels describing what level of engagement or interaction with the post is required or has taken place. Options include:
  - a. Commented, Closed
  - b. No Engagement Requred, Closed
  - c. Needs Review, and Commented
  - d. Awaiting Reply.
- **Set Classification**: Click on the Classification you feel is most appropriate from the list to apply it to a post (such as product inquiry or customer support issue). Options include:
  - a. General mention
  - b. Support
  - c. Sales
  - d. Product Inquiry
  - e. Company and Partner Mentions
  - f. Other
  - g. Company Content
  - h. Company Events
  - i. Recommendations/Referral

- **Create Salesforce Case or Contact**: If your Radian6 account is connected to your Salesforce org, you can select to create a case or contact from the post.
- **Add a Note**: You can use notes in addition to any applied identification tags. Your note can be about anything and can only be read by people in your organization with a Radian6 login.
- **Mark Post as Deleted in Radian6**: This will change the Engagement status to Deleted and remove the post from your Engagement Stack.
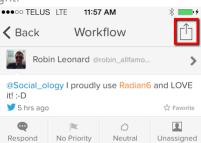
To apply workflow to a post, complete the following steps:

1. In the **Quick Search** stack view, tap the post to which you want to apply workflow. The **Workflow options** display for the post.
2. Select the workflow option you want to adjust. A popup menu list displays.
3. Tap the relevant setting. The menu closes and the workflow option updates.

Share a Post

You can share any post with anyone in your company, whether or not they have a Radian6 account. To share a post, complete the following steps:

1. In the **Quick Search** column, tap the post you want to share. The **Workflow options** display.
2. Tap the **share** icon on the top right.

3. Tap **Share via Email**.
4. In the **To: field**, type the email address of the person you want to email the post to.
5. In the **Subject** field, type a subject for the post.
6. Click **Send**.

7. The email message is sent and you are returned to the post **Workflow options**.

View Additional Details about Social Media Sources

In workflow mode, the top of the post displays the name of the social media source. Tap the name to obtain more information about the source.

The type of information you receive depends on the type of social media source:

- **Blog posts, videos, images, mainstream news, forums**: Displays Source tags assigned to that blog in Radian6 and recent posts on the blog that match your search. You can add a note about the blog.
- **Forum replies**: Displays source tags assigned to that forum (not the forum replier) and recent posts made on the forum. You can add a note about the forum.
- **Facebook post**: Recent posts that match your Quick Search are displayed. Source tags are not available for Facebook posts.
- **Comments**: Displays source tags assigned to the site where the comment was made (not the commenter) and recent comments made on that site. You can add a note.
- **Aggregators**: Displays source tags assigned to the aggregator site and recent comments made on that site. Notes about that site.
- **Buy/Sell**: The information displayed depends on what type of social media source the post was made on (blog/Twitter etc.).
- **Twitter**: Displays number of Tweets, number Following, and Followers. A Follow button is available. Latest tweets from that Twitter account that match your Quick Search are also displayed.

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Create New Content

You can create new content and post it directly to your Twitter feed or managed Facebook page from Radian6 Mobile.

To post new content from Twitter, complete the following steps:

1. In the top left of the Stack, select the Main Menu icon.
2. Select **Send a Tweet**. The **Tweet** screen displays.

3. Check the listed Twitter handle underneath the heading **Tweet**. If this is not the Twitter handle you want to post from, click the drop-down arrow under the listed account and select the required account.
4. Type the text to tweet out to your followers. The number of characters remaining is listed on the bottom right.
5. Click **Send**. The post is sent to your followers.

To post new content from a managed Facebook page, complete the following steps:

1. In the top left of the Stack, select the Main Menu icon.
2. Select **Post to Facebook Page**. The **Facebook Post** screen displays.

3. Check the listed Facebook page handle underneath the heading **Facebook post**. If this is not the Facebook page you want to post from, click the drop-down arrow under the listed account and select the required account.
4. Type the text to post to your followers.
5. Click **Send**. The post is sent to your followers.

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