



NetSocial Quick Start Guide

The document is a resource for getting started with NetSocial.

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NetSocial Quick Start Guide

We've found that following this process is the easiest and most efficient way to get started:

1. Set up the organization and begin sharing to company accounts
2. Set up your personal account and begin sharing to your social media accounts
3. Setup your team so they can begin sharing

Let's begin

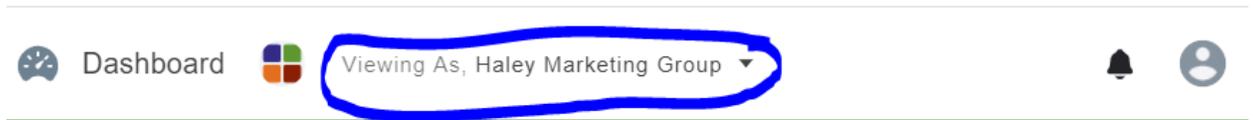
1. Login to your account
You should have received a welcome email from Net Social. If you did not, please reach out to your PM right away. Your PM will resend the email so you can login.
2. Walk through the Tutorial
This will give you a good overview of NetSocial and how it works.

Set up your organization and begin sharing to company accounts

As an Administrator, you can manage organization settings by selecting “Viewing As, [organization]” in the top menu.

It is important to understand that when you are viewing as yourself, you are managing your personal settings, social accounts, posts, channels, etc. When you are viewing as an organization, you are managing settings, channels, teams, social accounts, etc. on behalf of the entire company.

1. Switch to the Organization View



2. Review and adjust any settings that are needed.

We've done our best to get you setup, so you won't have too much work to do, but it is even better if you take a moment to review and update as needed.

Global Approval Settings

NEW POSTS REQUIRE EDITOR APPROVAL FOR

Select Restriction
None

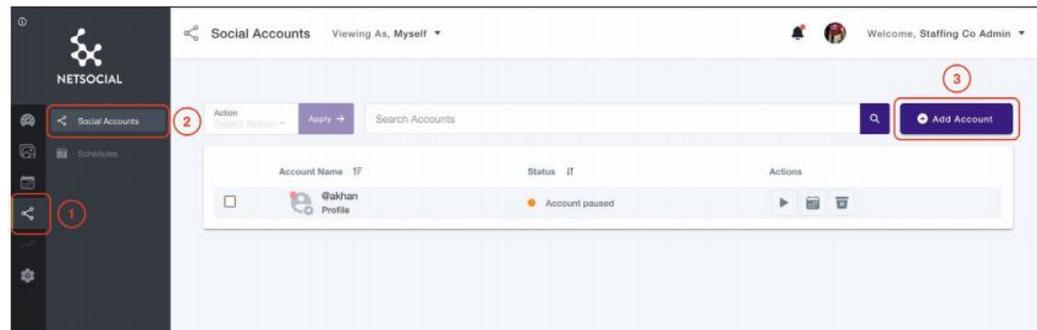
USERS CAN CREATE CONTENT

Select Restriction
All Accounts

3. Connect your company's social media accounts.

Remember, these are not your personal social media accounts. You should be setting up your company accounts at this time. You must be an administrator and have access to the company social media account to connect the account.

- a. Make sure you are viewing as your company, then in the left navigation menu, select “Social Accounts”.
- b. Clicking “Add Account” will prompt you to select a type of service, Facebook, LinkedIn, or Twitter to link.
- c. After selecting, you will be redirected to the service to authorize NetSocial.



Set Up Channels to share Content

Channels are groups of content that users can subscribe to. When a user subscribes and adds a social account, this content will flow into their accounts periodically and post based on a set up schedule (see schedules)

Posts are content, texts/links/images/video, to share to a service like Facebook, LinkedIn, and Twitter. There are two types of posts: (1) posts directly to your personal accounts or (2) posts to a channel. If a post is created for a channel, it will feed out to all subscribers and their accounts linked to the subscription.

1. Review the channels that are setup and if needed, create additional channels
Instructions for setting up a channel are available in this screencast:
<https://youtu.be/kTvzHWVCyxs>
2. Add content to the channel
Content can be added to channel via an RSS feed or manually creating a post for the channel. The RSS feed will be checked at a rate that is set in channel settings.
3. Start Sharing to company accounts (connect accounts to channels)
Make sure your company accounts are subscribed to your new channels. Content from the subscribed channel will post to accounts you have included in your channel subscription.

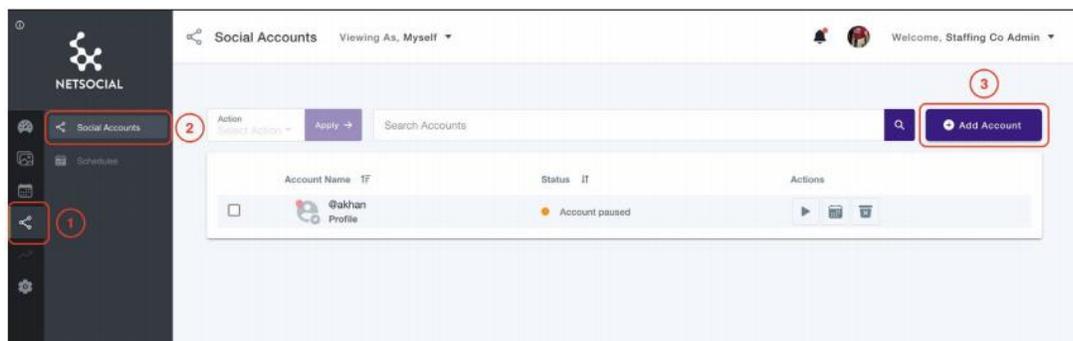
Setup up your own personal admin account.

Now that your company account is setup and ready to go, you can start sharing to your personal social media accounts.

1. Switch to the Personal View



2. Connect your personal social media accounts.
 - a. In the left navigation menu, select “Social Accounts”.
 - b. Clicking “Add Account” will prompt you to select a type of service, Facebook, LinkedIn, or Twitter to link.
 - c. After selecting, you will be redirected to the service to authorize NetSocial.



3. Review and add yourself to channels

Setup up your team to start sharing.

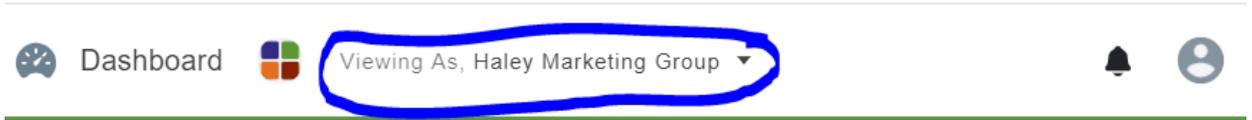
Finally, you can start sharing with your Team.

What is a Team? A team is a group of members that would share similar content. For example, you may have a Sales Team, a Service team, a team of recruiters, etc.

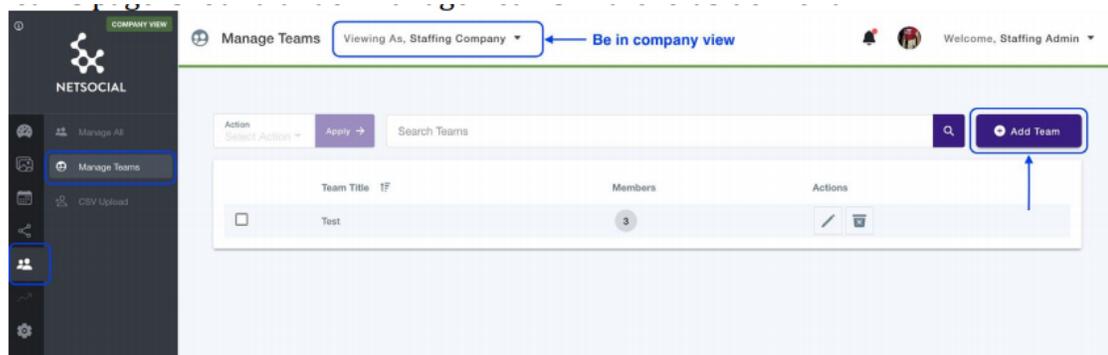
Why should you create teams? Teams can be invited to channels, instead of inviting individual team members in your organization. Adding teams will make it easier to manage sharing content based on interest, which in turn can improve your views, likes and shares of that content.

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1. Switch to the Organizational View



2. From the left side menu, select Manage Teams



3. Add any additional Staff that was not created on setup
4. Create Teams and add staff to the Teams
5. Assign Teams to Channels
6. Invite Team Members
7. Follow up with Team Members who have not completed their sign up

