NetSocial Guide

The document is a resource for getting started with NetSocial.

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Team Members

Each team member in NetSocial belongs to an organization. Team members will have varying roles, which will effect how they experience NetSocial and their permissions.

How do I invite a team member?

Only Admins can invite team members. Invites require the person's email address, which is also used for authentication.
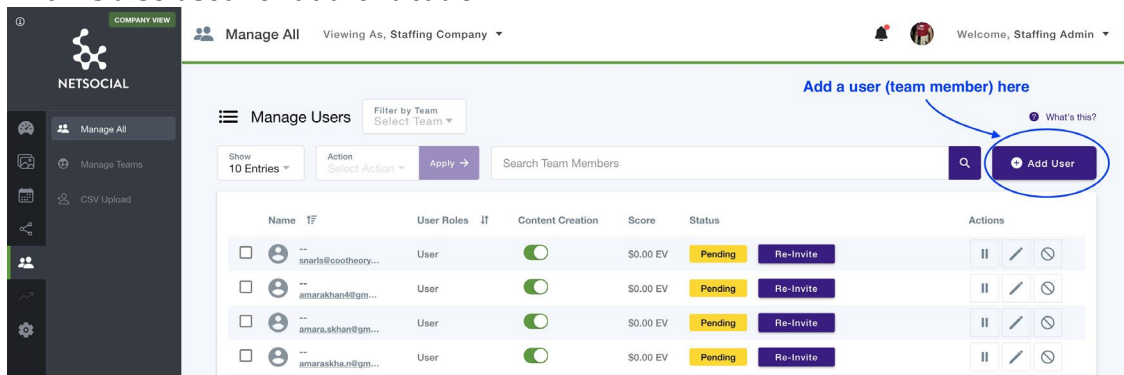
Team Members Vs Organization

Team members belong to an organization. Admins are a team member role that allows for managing organization team members and settings.

I'm an Admin team member, how do I see organization settings?
Admins can manage organization settings by selecting "Viewing As, [organization]" in the top menu. When you are viewing as yourself, you are managing 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 organization.

I'm an Admin team member, where do I link social accounts?
If you're an Admin, you will have access to both personal and organization settings. If you add social accounts when viewing as yourself, they are personal accounts. If you add social accounts when viewing as an organization, those are organization accounts.

We suggest you link personal social accounts to yourself when viewing as yourself, and link organization social accounts to the organization

Teams

A team is a group of team members. This is managed in organization view. Switch to organization view by selecting "Viewing As, [organization]" in the top menu. Manage Teams page is found under Manage Teams in the left side menu.
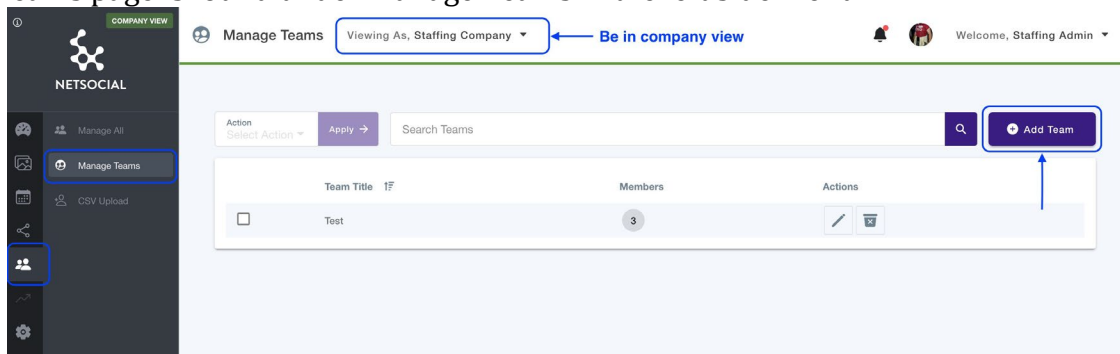
Teams can be invited to channels, instead of inviting team members in your organization individually.

<u>Channels Vs Posts</u>

[Create Channel Screencast](#)

Channels are pools 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. Posts directly to your personal accounts or 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.

Who can create a channel?
Team members and companies

Who can subscribe to a channel?
Team members, companies, and groups (collection of team members) can subscribe to public channels within their organization created by the organization, admin, or editor. Private channels can only be subscribed to by the creator, unless the channel is changed to public.

How is content added to a 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.

How do I manage what social accounts receive channel content?
When a team member subscribes to a channel, the team member is required to link at least one social account. These accounts must have already been linked during onboarding or on the Social Accounts page. You can update accounts in your channel subscription on the Manage Channels page. Hover over the channel and click "manage". Content from a subscribed channel will only post to accounts you have included in your channel subscription.

Can I decide what gets posted? This is dependent on your Approval Settings (see approvals section on how to manage this setting). If you have approvals required, you will have the option to approve or skip content in a channel. If approved, the post is added to your account schedules. For more information on schedules and managing schedules, see social accounts and schedules section.

Categories

Categories is a group of channels. A channel can only be in 1 category. Categories can be public or private. Public categories allow a team member in the organization.

How do I create a category?
Categories are created on the Channel Categories page, found under "Content" in the left navigation menu. Clicking "Add Channel Categories" will bring up options for creating a category.

A category's visibility can be controlled with the private/public setting. If a category is public, other team member's can subscribe to the category, which will subscribe the team member to all the channels in the category.

How do I subscribe to a category?
If there are categories available to subscribe to, they will appear on the Manage Channels page under available channels.
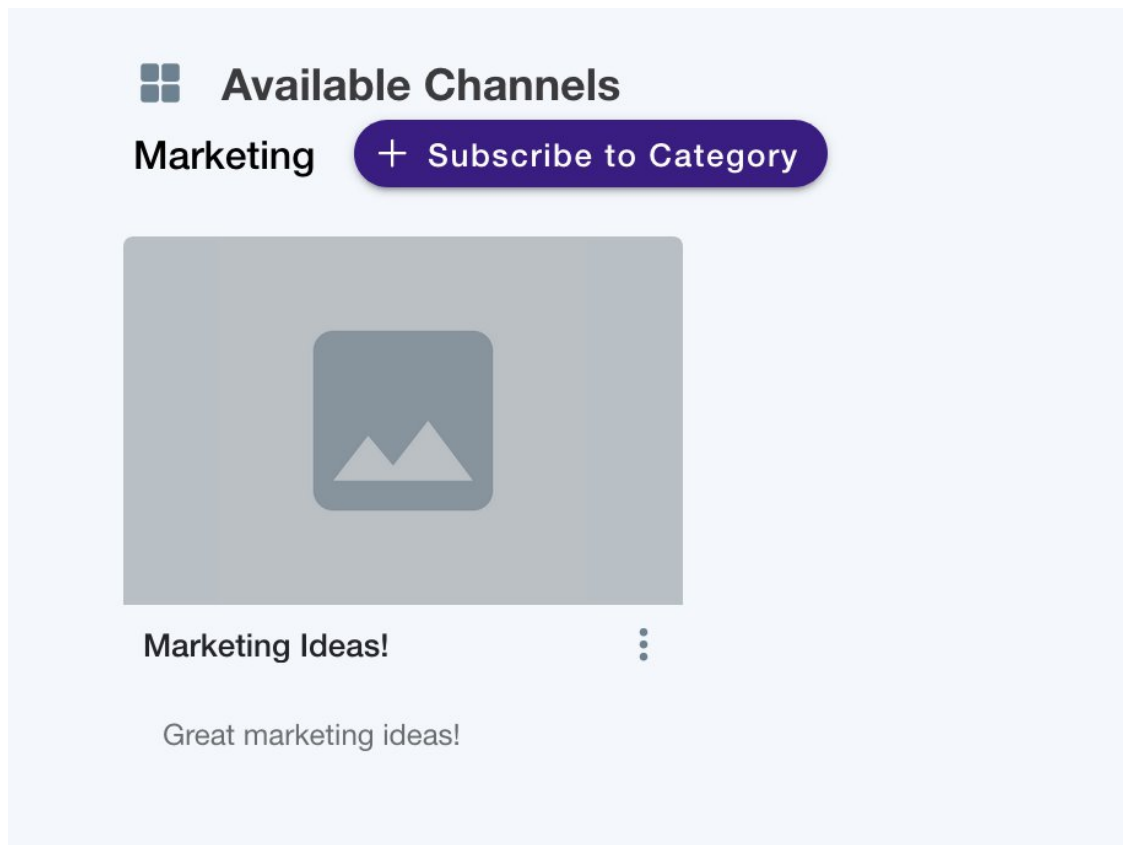
Social Accounts and Schedules

[Schedules Screencast](#)

By linking social accounts, like Facebook, LinkedIn, and Twitter to your NetSocial account, you can make the most of your NetSocial experience. By linking one of your socials, you can subscribe to channels, create posts, create an optimized posting schedule, and track your post performance.

How do I link an account?
Accounts can be linked on the Social Accounts page found under "Social Accounts" in the left navigation menu. Clicking "Add Account" will prompt you to select a type of service, Facebook, LinkedIn, or Twitter to link. After selecting, you will be redirected to the service to authorize NetSocial.
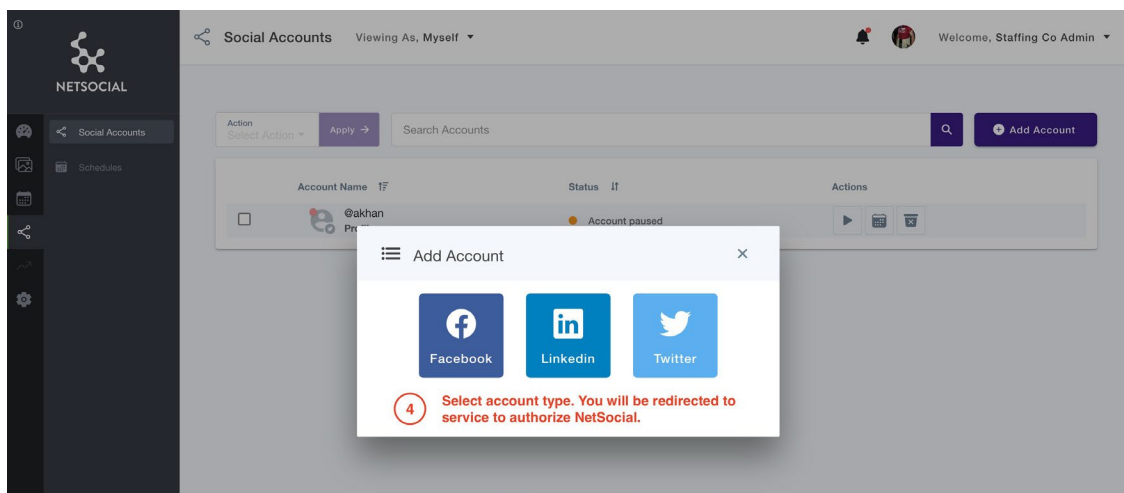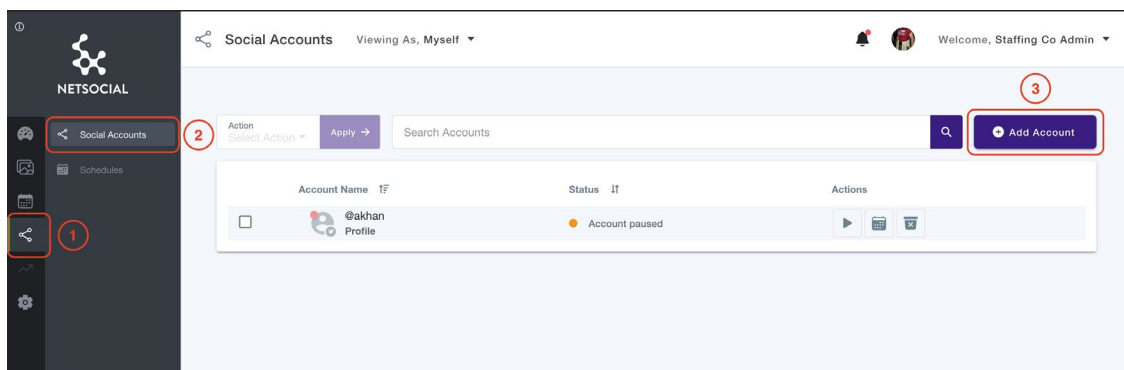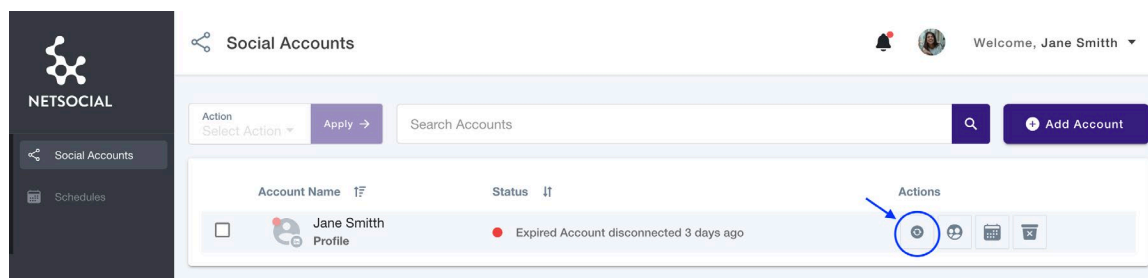
How do I link a page or group?

With Facebook, both pages and groups can be linked to your NetSocial account. With LinkedIn, a business page can be linked to your account. The link is established through your profile. If you decide to remove a profile, you must first remove linked pages or groups from that account on NetSocial.

I received an email that my account has been disconnected, what do I do?

To keep your account secure, services will periodically require you to re-authenticate your account with NetSocial. If NetSocial notifies you your account has disconnected, you will need to add this account back on the social accounts page. A disconnection can also occur from password changing and revoking NetSocial app privileges.

Navigate to the Social Accounts page in NetSocial. Click on the "reconnect" icon in the actions column in your account row. You will be redirected to the correct service to authenticate the account. If you are not already logged into the correct account, you can do so when redirected.

For more help, please go to https://helpme.haleymarketing.com.