



# SOCi User Guide

Your Go-To Resource for Navigating the Platform

## WELCOME TO SOCi!

SOCi, the leading all-in-one platform built specifically for marketers like yourself! Use this guide to get started quickly with your Social, Reputation and Listings networks.

## HOW TO LOG IN

Logging into the SOCi platform will provide you with access to link all of your reputation and listings networks. Additionally, you will be able to post to connected social networks and respond to engagements, respond to all reviews and view actionable sentiment and competition reports, and update and view your online listings performance. Each user will receive a welcome email with instructions on how to set up their password.

[Click here](#) to log into SOCi or go to [app.meetsoci.com](https://app.meetsoci.com) to log in.

### Is it your first time logging in?

Click the forgot password link if this is your first time logging in to create your password. You will then receive an email enabling you to set your password. This link will redirect you back to the login screen.

### Have you logged in before but don't remember your password?

No worries! Once on the login page, simply click the forgot password link.

A screenshot of the SOCi Sign In form. The form is centered on a light gray background. At the top, there is a black header bar with the SOCi logo. The form itself is a white rectangle with a black border. It has a title "Sign In" in bold. Below the title are two input fields: "Email" with a placeholder "Email Address" and "Password" with a placeholder "Password". Below these fields is a black "Sign In" button. Under the button is a link "Sign in with SSO". At the bottom of the form are two links: "Forgot password? Click Here" and "Need an account? Contact Us".



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## ACCESS SOCi ON MOBILE, DESKTOP OR TABLET

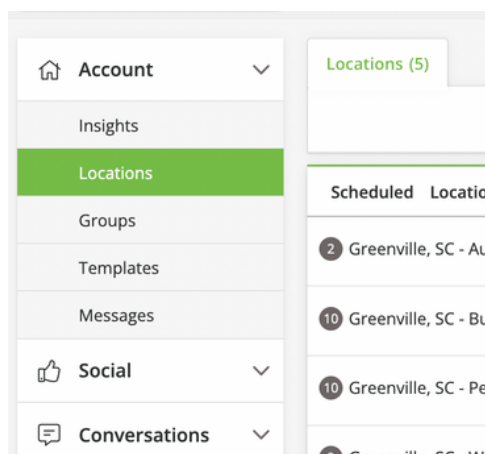
Execute all of your review and listings activities from the device that you're used to! Log in to SOCi on any device by opening up a browser and visiting [app.meetsoci.com](https://app.meetsoci.com) OR download the *SOCi Go! mobile* app in the [Apple Store](#) or [Google Play](#).

The following resources will show you how to complete tasks on your desktop, but the steps will be the same on your mobile or tablet device. To access the menu on mobile or tablet, simply click the hamburger icon ☰ in the top corner.

## DASHBOARD

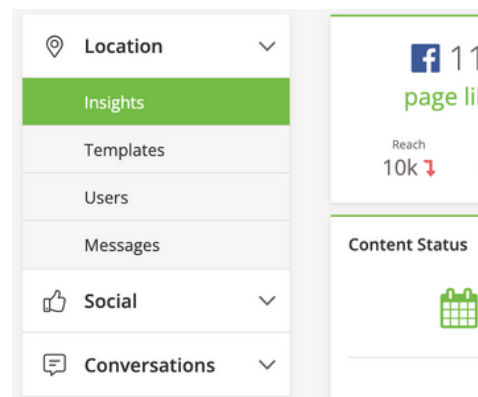
Once logged in, and depending on your access, you will be brought to the Account or Location level. If you are a manager of one location, then you will automatically advance into the Location tab. If you are a manager of multiple locations, then you will be advanced into the Account level first.

- **Account Tab:** View Insights over the entire account or all locations you have access to. Navigate to Locations or Groups tab.
- **Locations Tab:** View a list of any locations you have access to. Clicking into a location will allow you to take action at the location level.
- **Groups Tab:** Managers of multiple locations within SOCi can group locations together by region, state, or owner for example. By grouping locations together, you will have the option to schedule content at the group level and more!



*View for  
multi-location  
owners*

*View for  
single-location  
owners*



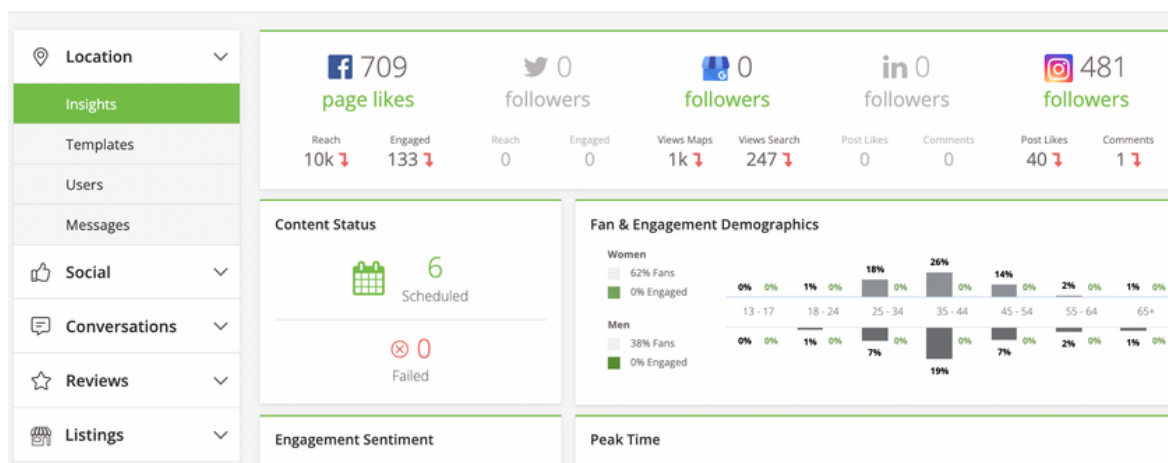


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## INSIGHTS DASHBOARD

The insights dashboard pulls in metrics from the past 7 days. This is meant to provide you with a quick snapshot of your account with updates on linked networks, social, engagements, reviews, and more.



## USER ROLES

All franchisees will be Managers. This means you have access to the location(s) you manage, will be able to post and respond to engagements on connected social media sites, respond to reviews on connected review networks, update online listings data, view reports, metrics, and more.

## ADDING USERS

As a manager of one or more locations, you will be able to add other teammates to the SOCi dashboard to help you manage your online reputation. Any manager user will be able to add another manager user to any location they have access to.

*Single location owners can follow these steps:*

1. Navigate to **Location** -> **Users**
2. Click the **+ Add User** button
3. Enter first, last and email, click **Add**

*Multi-location owners can follow these steps:*

1. Navigate to **Account** -> **Locations**
2. **Location** -> **Users**
3. Click the **+ Add User** button
4. Enter first, last and email, click **Add**
5. Repeat for each location



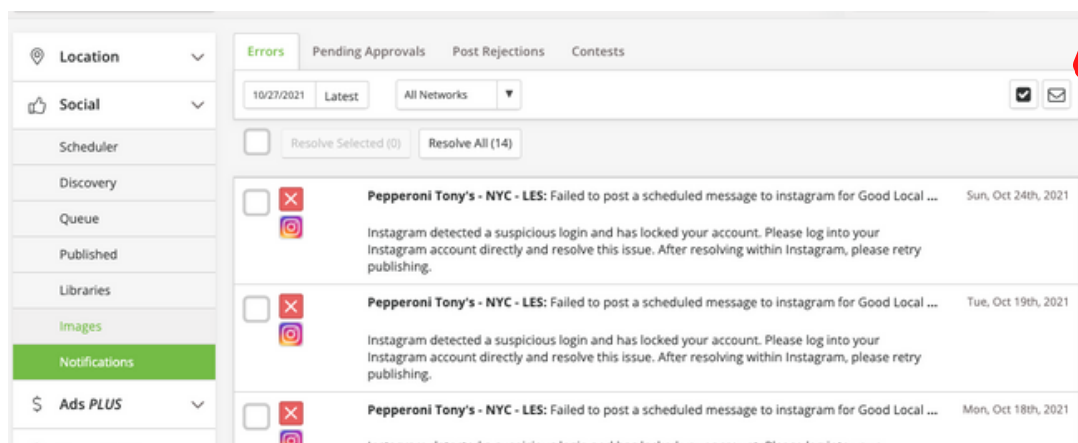
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## SETTING UP EMAIL NOTIFICATIONS

Looking for a way to be alerted when new things come into the SOCi platform? You can set up Email Alerts and choose what items you want to receive notifications for.

- Once in your location, head to the Social section and then select the Notifications tab.
- In the top right-hand corner, click on the envelope icon



From there, click on the “Create New Subscription” option. This will prompt you to define exactly what type of email notifications you would like to receive for your account, location, or group.

**Create Email Subscription**

1. Select an account, location or group to subscribe to

Select an account, group, or location ▼

2. Select notifications

**Errors & Warnings**

☐ All types ▼

**Engagements**

☒ Facebook Private Message, Facebook Comment ▼

**Content**

☐ All types ▼

**Ads**

☐ All types ▼

**Reviews**

☐ All types ▼

**Review Responses**

☐ All types ▼

**Location "Everything SOCIAL"**

Subscribed to: Facebook Private Message notifications, Facebook Comment notifications, Instagram Comment notifications, LinkedIn Comment notifications, Google My Business Question notifications, Google My Business Answer notifications

Notifications sent as they occur.

No reminders configured.





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## SCHEDULING CONTENT FOR THE FUTURE & POST NOW

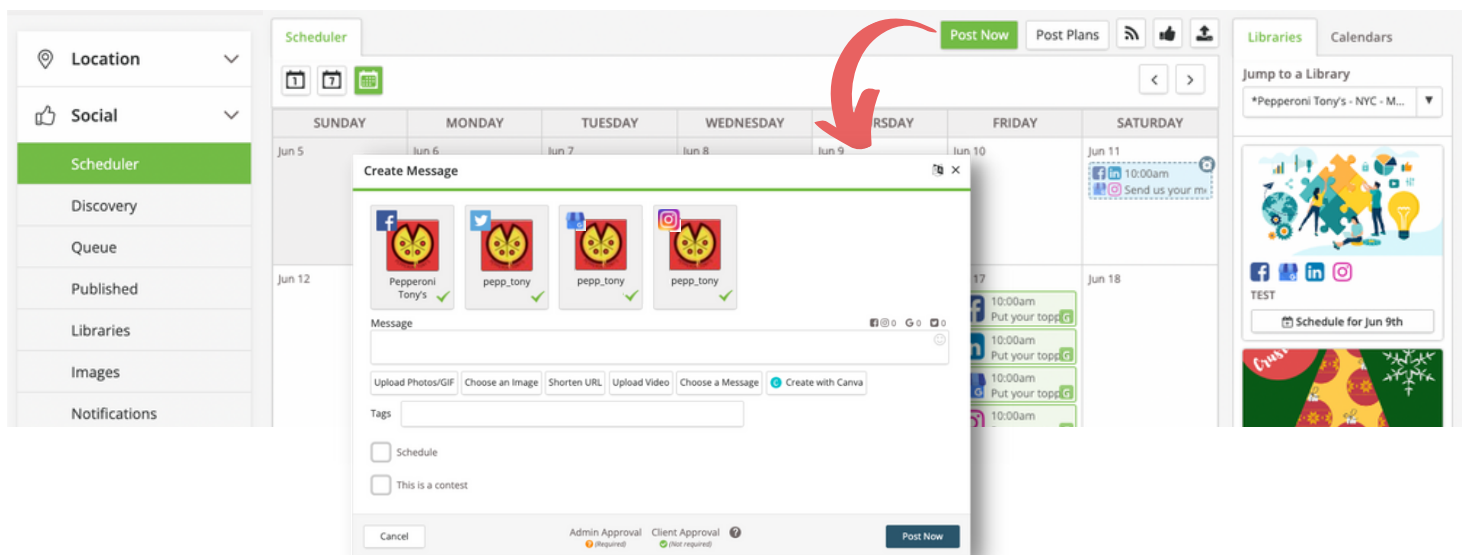
This is where you can view, edit, and create immediate or future posts. The scheduler is a great place to view what content has already been scheduled out so you can determine what needs to be added.

**Post Now:** Select the Post Now button to post to the selected networks within minutes.

**Scheduling a Post:** You can schedule a post minutes, hours, weeks, or even months ahead of time! The further in advance you schedule out the content, the more it'll help you organize your social posts.

## HOW TO POST

- Once you select your location, click the **Social** tab, and then select the **Scheduler**.
- Click the **Post Now** button (top right) or choose a day on the calendar to schedule a post for.



## SCHEDULER COLORS

- **Green:** Your post is successfully scheduled for the future date/time.
- **Grey:** Your post has already been published to the selected networks
- **Red:** Your post has an error associated. You can click on this post directly to get more information or head to your Notifications tab for details.
- **Blue:** Suggested posts from your corporate team.



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## SOCIAL > LIBRARIES

As you get up and running with the platform, we encourage you to access the Library section to see what content has been shared with you and add your own content! This is where you can build out your content for posts ahead of time. The more you build up your libraries, the easier it'll be to quickly schedule out posts! The libraries contain both the messaging as well as the visuals for your future posts.

The screenshot displays the SOCi platform's 'Libraries' section. On the left, a sidebar lists navigation options, with 'Libraries' highlighted. The main content area shows 'Pinned Libraries' with four categories: 'Brand Demo Account', 'Drinks & Apps', 'Holiday Content', and 'Ingredients/Process'. Each category has a representative image and a count. Below these are statistics for each category. A red arrow points to a search bar at the top right of the Libraries section.

Category	Count
Brand Demo Account	4
Drinks & Apps	21
Holiday Content	9
Ingredients/Process	19

**Pro Tip:** Creating content outside of what has been shared with you provides your audience with the personal connection that they crave! By doing so you're further building a connection with both current and future customers as well as your surrounding community.



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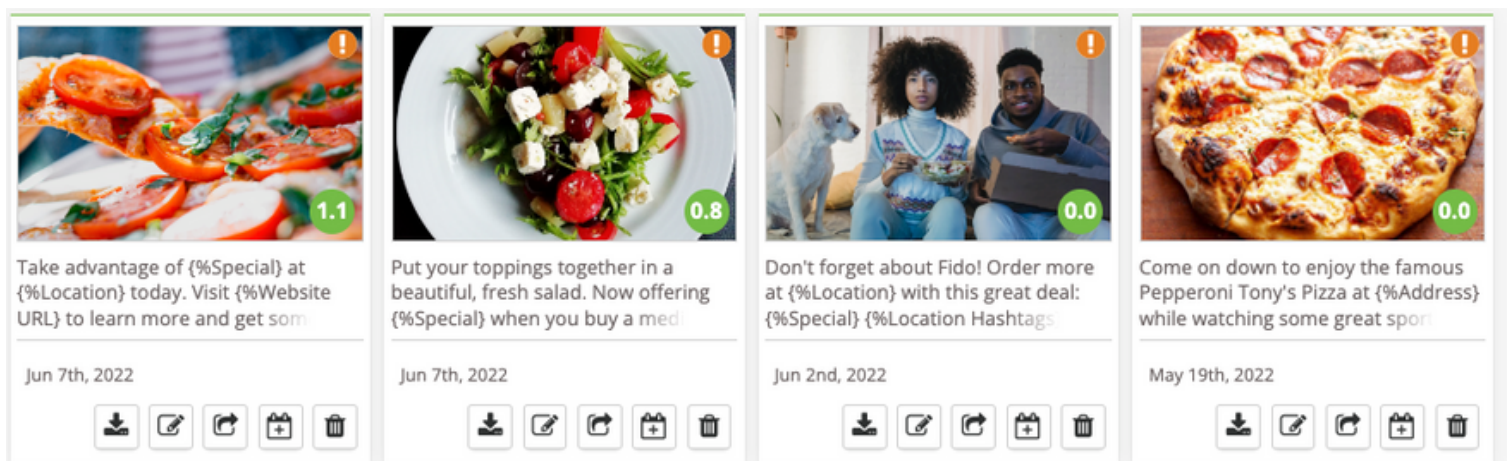
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## ACCESSING CONTENT WITHIN A LIBRARY

Once you find the library you're looking for, click on it to access the content. As you scroll through and identify a piece of content you'd like to use, you have a couple of options.



- **Download:** This allows you to download this content out of SOCi and save to your computer.
- **Edit:** If you have the proper access, you will be able to edit shared content within a library. If you do not wish to make the change for everyone, you should select "move".
- **Move:** This allows you to make a copy of the shared content to then edit and customize your own version. You will need to move a the copy to a different library.
- **Schedule:** Schedule content directly from the library to take immediate action.
- **Delete:** If you have the proper access, you will be able to delete shared content within a library. If you do not wish to make the change for everyone, do not take this action.



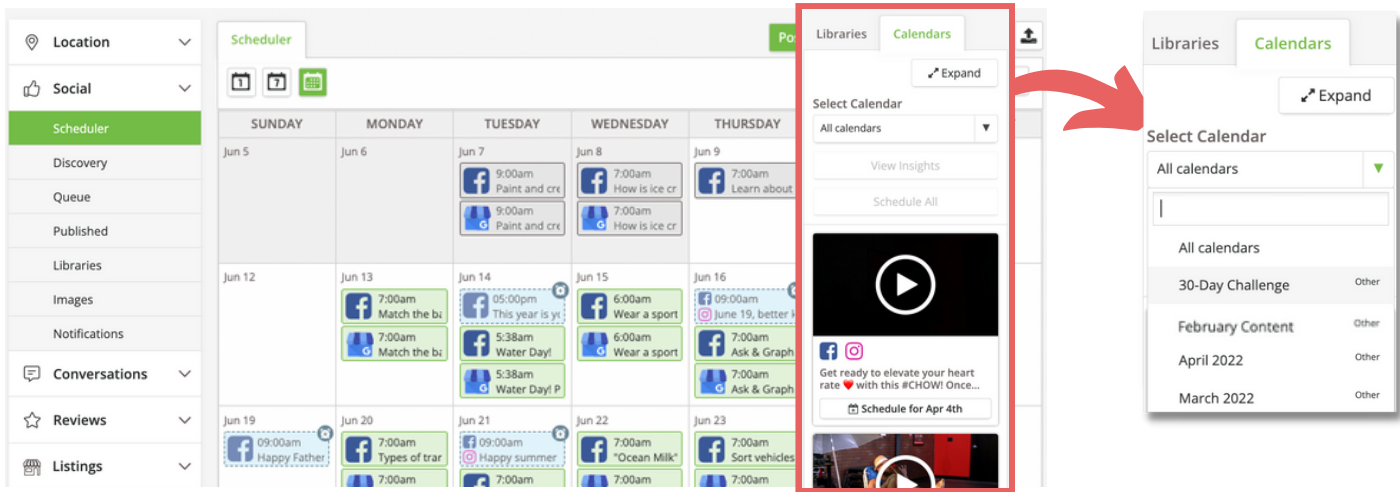


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## COMMUNITY CALENDAR

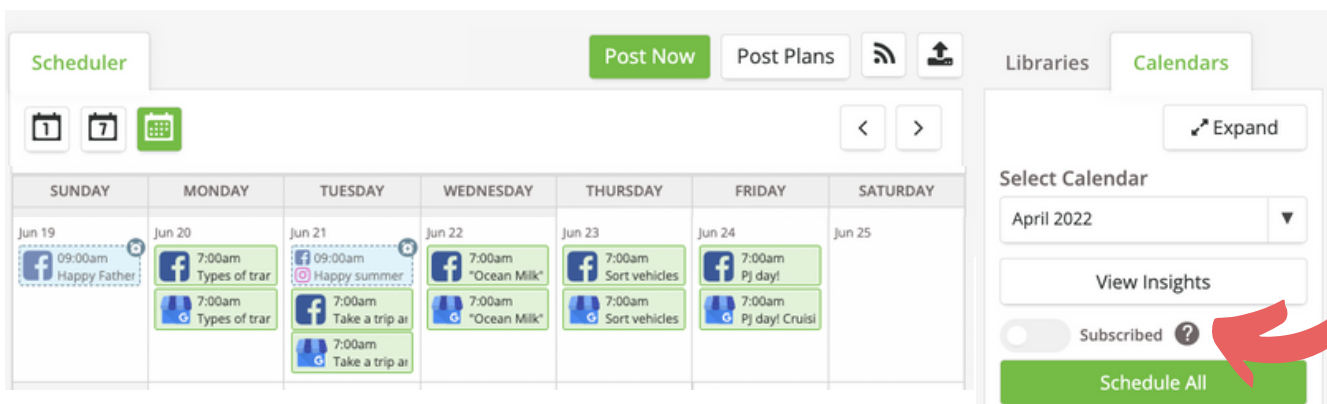
The SOCi Community Calendar allows your account administrators to create and share a pre-planned schedule of posts with you. You will then have the option to publish these posts on your social media pages with just a few simple clicks.



## SUBSCRIBE TO COMMUNITY CALENDAR

To ensure you don't miss any content, subscribe to ALL current and upcoming content on each calendar shared with you with just one click. To Subscribe to Community Calendar content follow these steps:

1. Navigate to your location
2. Click **Social** -> **Scheduler**
3. On the Library sidebar to the right of your scheduler, click the **Suggested** tab
4. Using the drop down menu, select any of the available calendars
5. Toggle the **Subscribe** slider





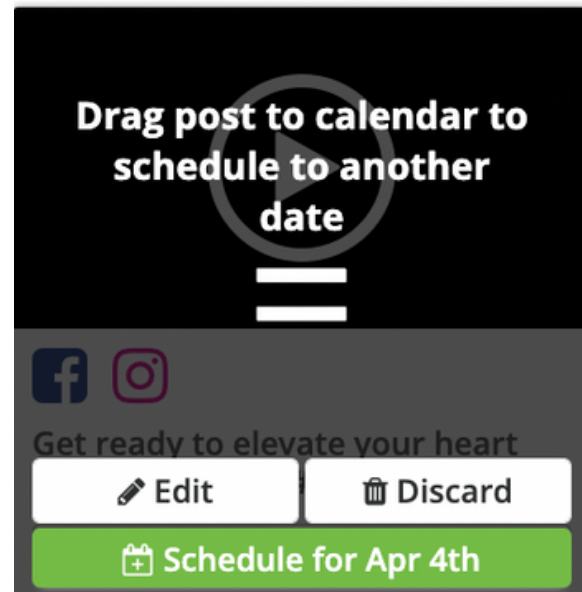
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## EDIT OR DISCARD POSTS

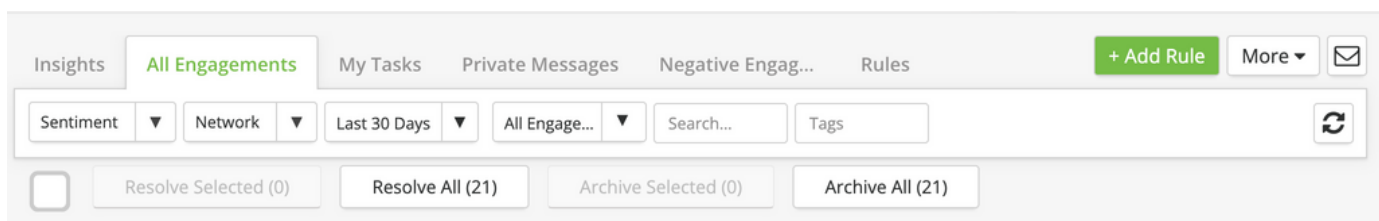
If you would like to edit a post you can either select into the post on the scheduler or select **Edit** from the Library side bar.

If you do not want to use the Community Calendar content, hover over each post in the Library sidebar and click **Discard** or open the post on the calendar and select **Discard**. If you take no action, the content will expire and not be accessible once it has surpassed the expiration date.



## ENGAGEMENTS

SOCi provides a centralized dashboard where you can respond to all engagements, rather than logging in natively to each network. These engagements pull in from Facebook, Instagram, and Google Q&A. To easily sort and find specific engagements, you can filter through engagements by sentiment, network, time frame, engagement type, and keywords.







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## ENGAGEMENT STATUSES:

- **New:** This indicates a new engagement that hasn't been viewed yet.
- **New with count:** This indicates a conversation is occurring and this is a new response within the conversation.
- **Opened:** This indicates the engagement has been viewed but not responded to yet.
- **Resolved:** This engagement has been responded to and marked as resolved, as no further action is required.
- **Archived:** Archive your resolved engagements.

## RESPONDING TO ENGAGEMENTS

To view your engagements, navigate to the **Conversations** tab, then click **Engagements**. See all engagements under the "All Engagements" tab. To respond, click the "Respond" button, then you have a few options to respond, (1) enter your response, (2) select from the available response templates, and/or (3) use the "Localize" dropdown. When your response is ready, click "Respond".

The screenshot displays the SOCi platform's 'Engagements' section. On the left, a sidebar contains navigation links: Location, Social, Conversations, Insights, Engagements (highlighted in green), Rules, Reviews, Listings, and Reports. Below these is a 'Location details' section with a note: 'You have not configured location details yet. [Configure now.](#)'. The main content area shows a list of engagements under the 'All Engagements' tab. A specific engagement is selected, showing a comment from James Allen Soci on a post about Pepperoni Tony's. A 'Respond' button is visible. A modal window is open for responding, showing a text input field (1), a 'Localize' dropdown (3), and a 'Templates' list (2). The modal also includes a 'Reply' button and a 'Respond' button.

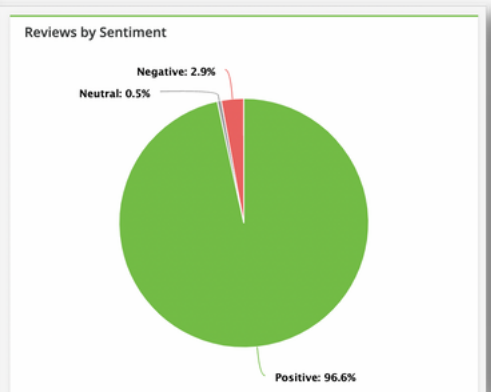
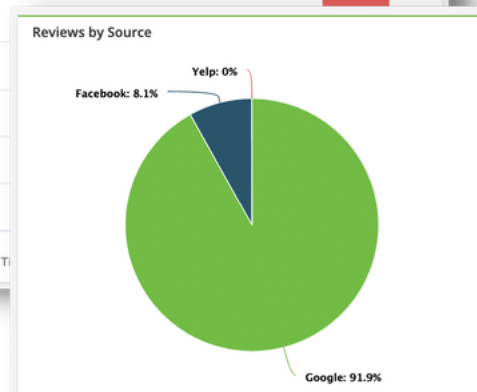
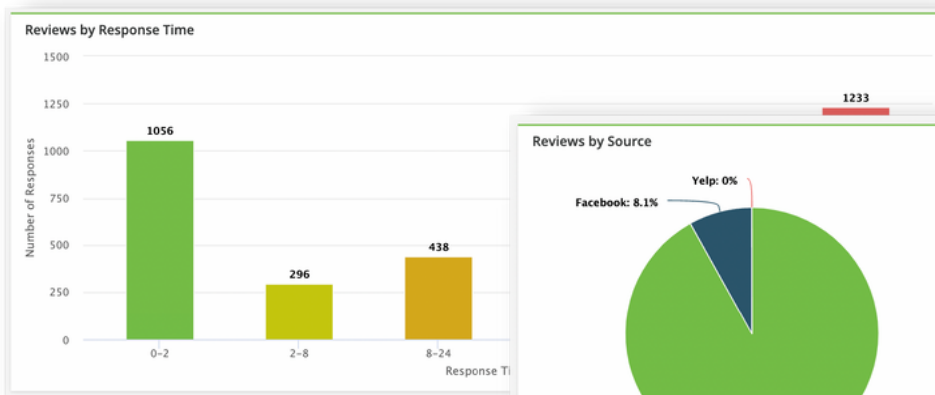
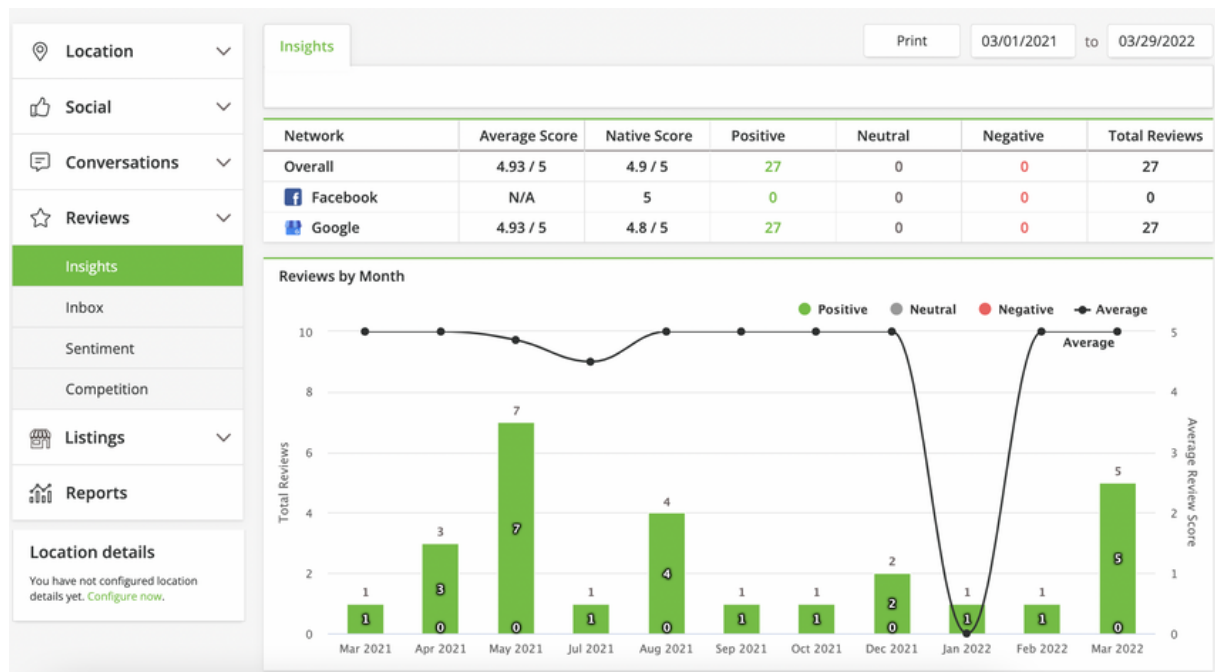


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## REPUTATION FROM THE INSIGHTS DASHBOARD

View a breakdown of your reputation networks, the sentiment of the reviews, as well as the review totals by navigating to the **Reviews** tab, then **Insights**. You will have access to various graphs pulling in analytics on Reviews by Month, Source, and Sentiment. Additionally, you can track response times to ensure you and your team are responding promptly.







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## RESPONDING TO REVIEWS

To jump right into responding to reviews, head to the **Reviews** tab and then **Inbox** tab. This will direct you to your Inbox where you will find a list of all new reviews that require a response and a history of reviews under the "All Reviews" tab. To respond to a review, click on a review in the "Inbox", then you have a few options to respond, (1) enter your response, (2) select generate response (click multiple times for new options), (3) select from the available response templates, and/or (4) use the "Localize" dropdown. When your response is ready, click "Send Response".

**Best Practice:** It is best practice to respond to a review within the first 24-48 hours of it being posted.

The screenshot illustrates the SOCi platform interface for responding to reviews. On the left, a sidebar contains navigation options: Location, Social, Conversations, and Reviews. The main area displays the 'Inbox (447)' tab, showing a list of reviews. A specific review from Amanda is highlighted, stating 'I love this place sooo much! Everyone should go.' with a 5-star rating. A red arrow points to the 'Respond' button for this review. Below the review, a modal window titled 'Respond To Amanda' is open. This modal contains a text input field for a custom response (labeled with a red circle '1'), a 'Clear' button, a 'Localize' dropdown menu (labeled with a red circle '4'), a 'Generate Response' button (labeled with a red circle '2'), and a list of response templates (labeled with a red circle '3'). The modal also includes 'Close', 'Mark Resolved', and 'Send Response' buttons at the bottom.

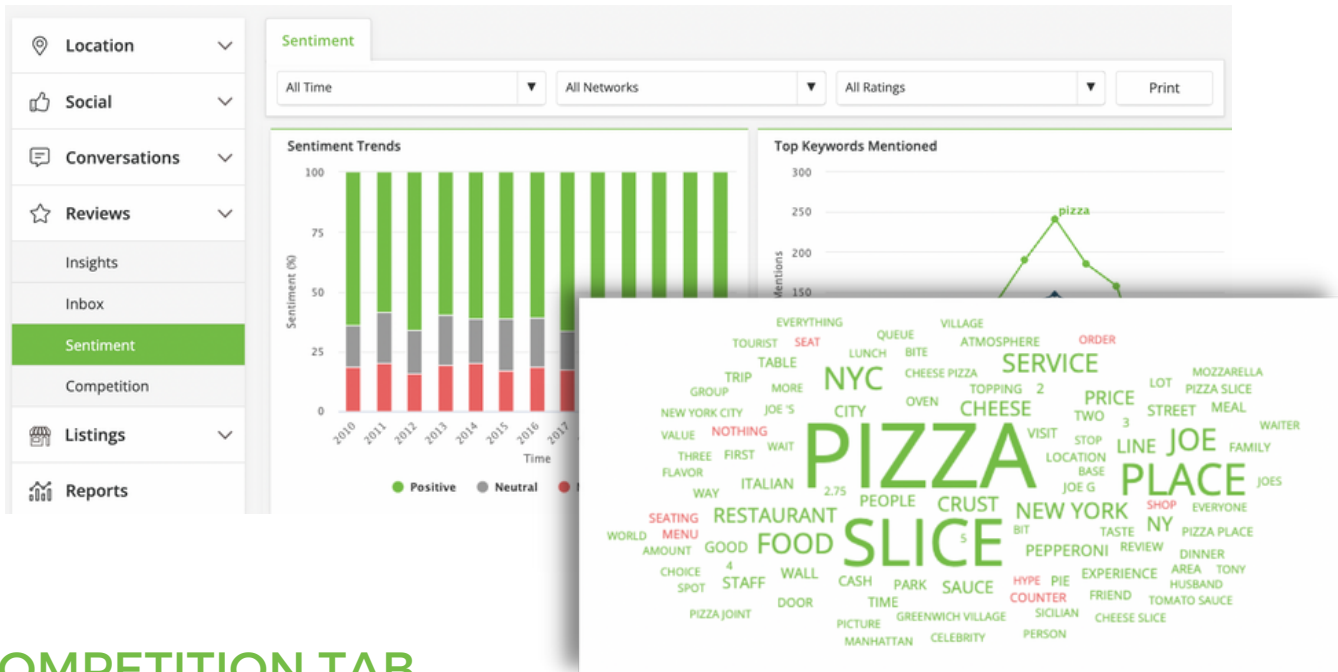


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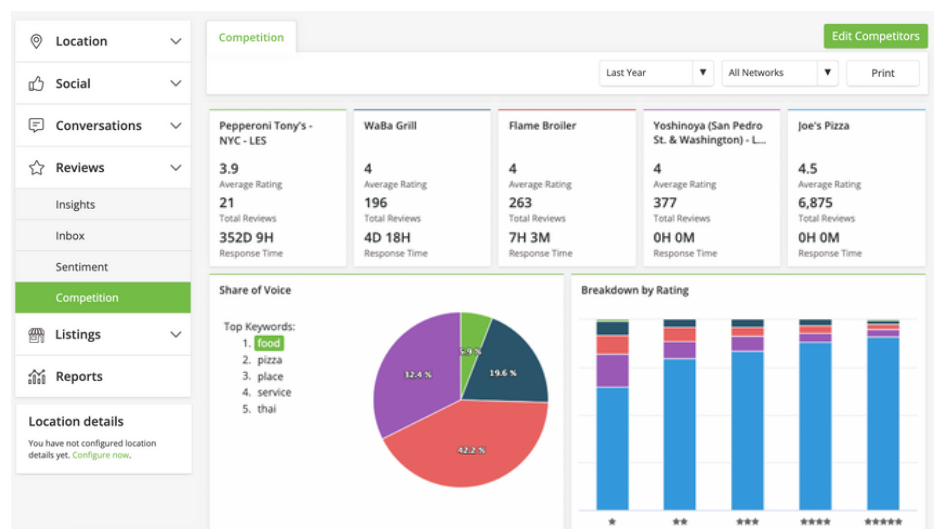
## SENTIMENT TAB

Head to **Sentiment** tab under **Reviews** to gather more information about your sentiment trends and top keywords being mentioned within reviews.



## COMPETITION TAB

With the competition tab, you can pull up to 4 local competitors into the SOCi platform. This will allow you to see how your competition is performing when it comes to reviews. Once you add local competitors, please be aware that it may take up to 24 hours for SOCi to compile the information. Once configured, you will be provided with your competition's star rating, total review numbers, and average review response time so you can see how you stack up!





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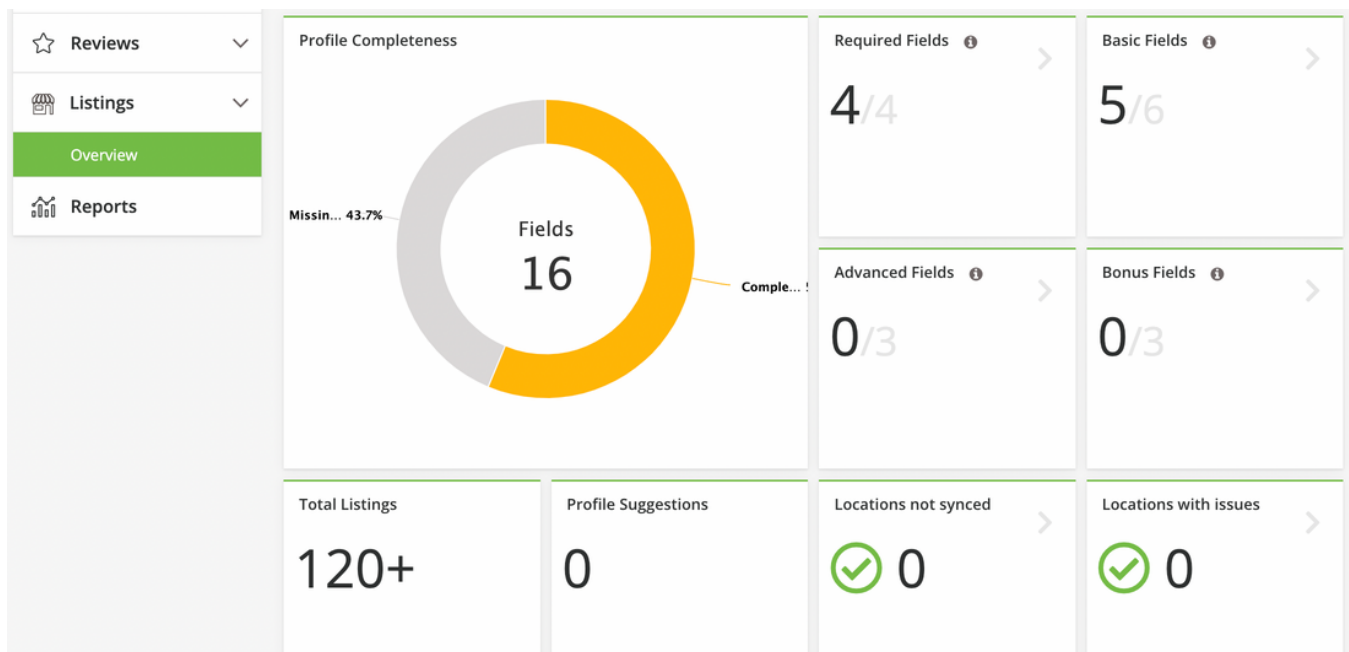
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## LISTINGS OVERVIEW

As a powerful tool to help customers find you online, business listings are critically important to maintain. However, monitoring and updating listings across 50+ directories is nearly an impossible task for any business. SOCi Listings empowers you to manage your business listings and effectively optimize your online presence and local search rankings. From syncing, updating, and managing your local listings to profile recommendations, SOCi Listings covers every step of the process to launch your listings to the top of search results. Moreover, a single source of truth will ensure uniform business information across all listings directories and limit the occurrence of costly errors.

*Some of the key benefits include:*

- Easily pinpoint missing information
- Immediately confirm accuracy and consistency across the web
- Quickly update information
- Stay data-informed with real-time, actionable insight and advance towards maximum local search visibility
- Stay on top of discrepancies





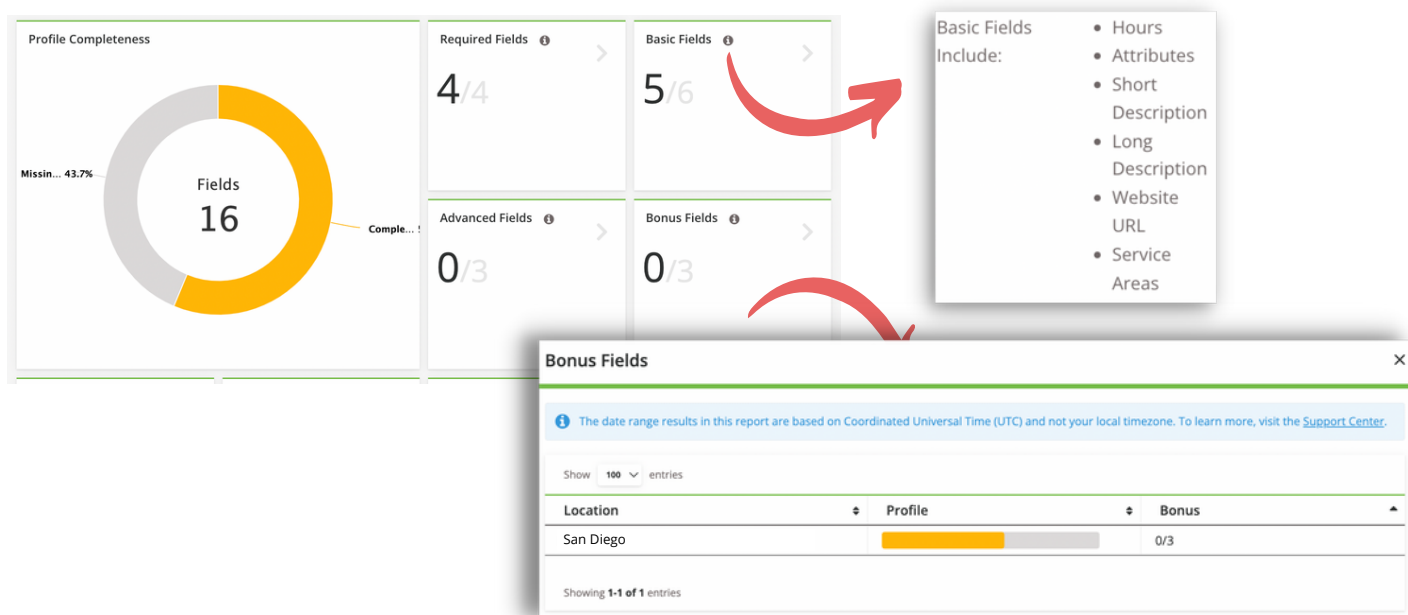
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## PROFILE COMPLETENESS CHARTS

Having a complete profile increases your online credibility making it easier for consumers to find your business.

The **Profile Completeness** score lets you know what data may be missing from your listing. The chart provides you with the percentage share of completed versus missing fields, and the total number of fields-- displayed inside the donut chart.



While the Profile Completeness is a good indicator of the overall health of your listing status, it can be slightly misleading because it is calculated with equal weight given to all location fields.

Almost all top directories attribute more weight to certain fields as they are considered more impactful for search ranking over others. As a result, we have also categorized all location fields into 4 categories in terms of SEO impact. Those categories are Required, Basic, Advanced, and Bonus.

Within the SOCi dashboard, clicking on each field category will allow you to see what fields are not complete, and allow you to make updates. Additionally, clicking on the info icon will share details of each category.




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## UPDATE YOUR LISTINGS INFORMATION


To update your hours with the SOCi dashboard, follow these steps:

1. Navigate to your location
2. Click **Listings**
3. Either click on one of the Field boxes and click on your location name OR scroll to the bottom of the page and click on your location name
4. Click any of the tabs (**Profile**, **Hours**, **Categories & Attributes**) to view, edit, add, or delete any of your location information
5. Once your updates are complete, click **Save**
6. If you didn't make any changes, or don't want to change anything after viewing, click **Cancel**



Show	100	entries
Location	Profile	Bonus
San Diego	<div><div></div></div>	0/3

Showing 1-1 of 1 entries



### Listings

Auto-sync ☒ On

Profile

Hours

Categories & Attributes

Custom Fields

Approvals

Images

Internal Name

San Diego

Listings Name

San Diego Clinic

Address Line 1

555 South Main Street

Address Line 2

Suite A

No Edit History

City

San Diego

Cancel

Delete

Save



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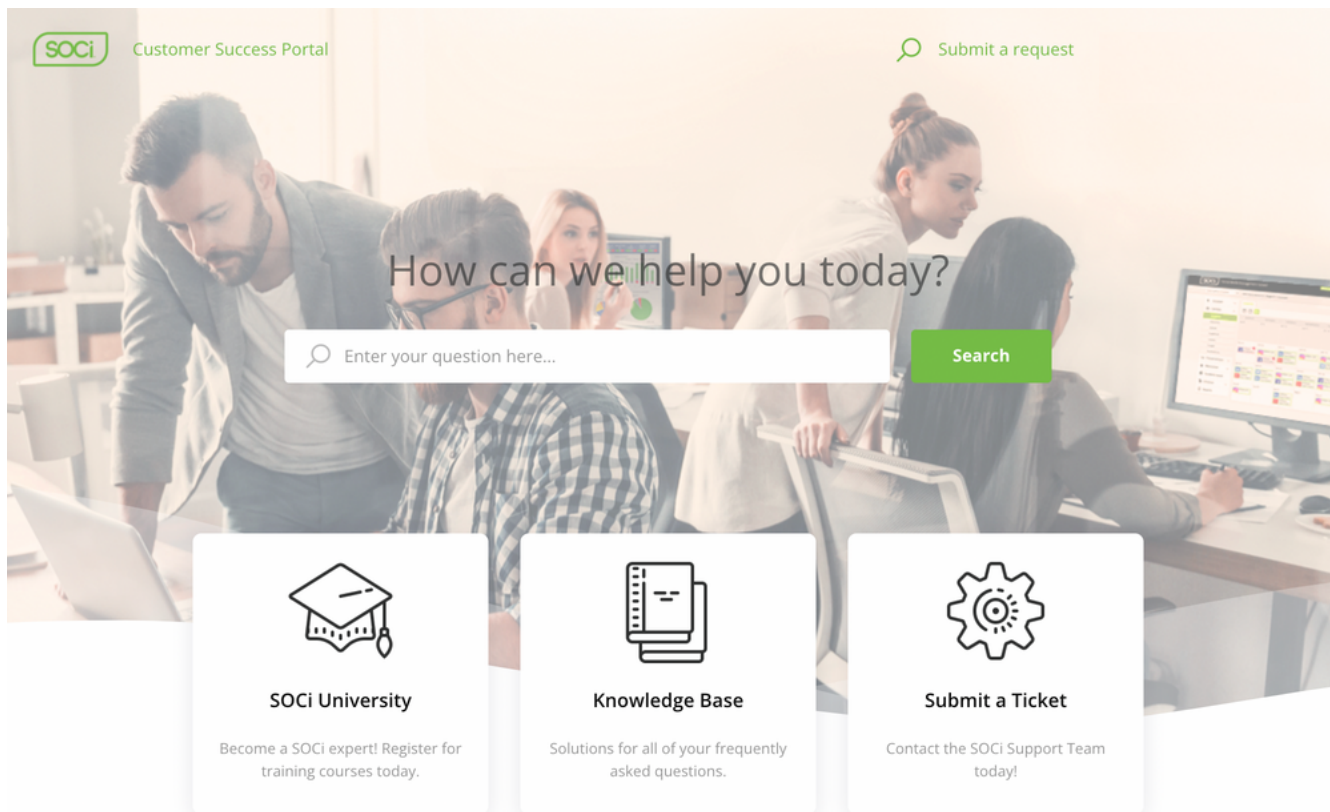
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## SUPPORT RESOURCES

Getting used to anything new takes time. That's why SOCi has created a variety of ways for you to learn. There's something for every style!

### Check out these available resources:

- **Watch:** Visit [SOCi University](#) to view on-demand videos.
- **Attend:** Register for [live training](#) hosted weekly.
- **Read:** Visit the [SOCi Customer Knowledge Base](#) for articles.
- **Other Questions:** Email [Support@meetsoci.com](mailto:Support@meetsoci.com).



You will need to be logged in to SOCi (or use your SOCi login) to access the above resources. Your SOCi username is your email address. If you're having trouble logging in, click the **Forgot password** link on the [login screen](#) and follow the prompts. If you're logging in to the SOCi University video portal for the first time, you will be asked to enter your name, business name and time zone.