



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.

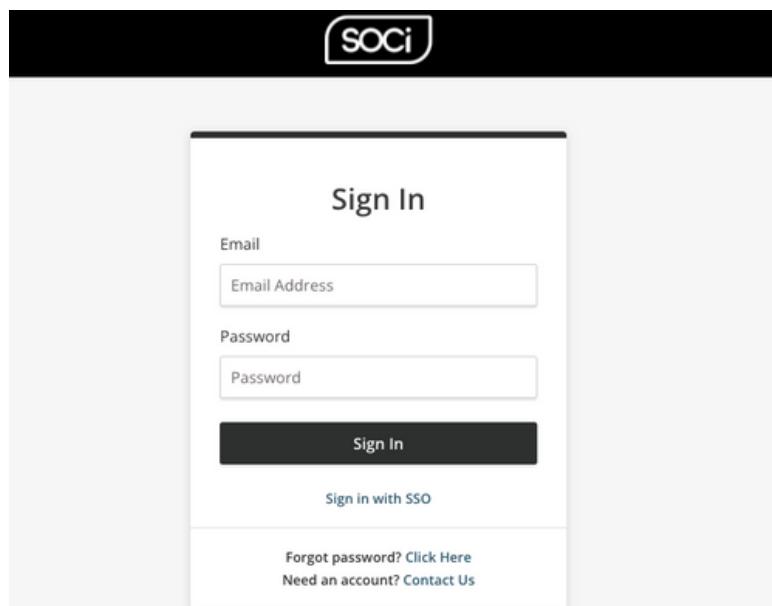
[Click here](#) to log into SOCI or go to app.meetsoci.com to log in.

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.





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ACCESS SOCi ON MOBILE, DESKTOP OR TABLET

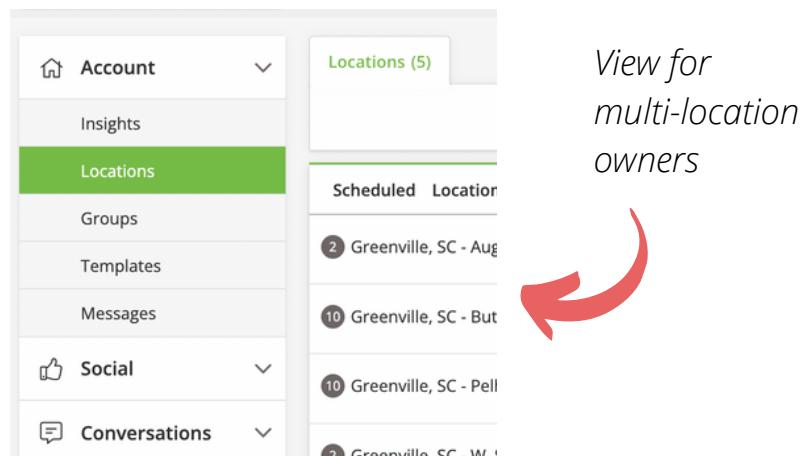
Execute all of your review and listings activities from the device that you're used to! Log in to SOCi on any device by opening up a browser and visiting app.meetsoci.com OR download the *SOCi Go!* mobile app in the [Apple Store](#) or [Google Play](#).

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.

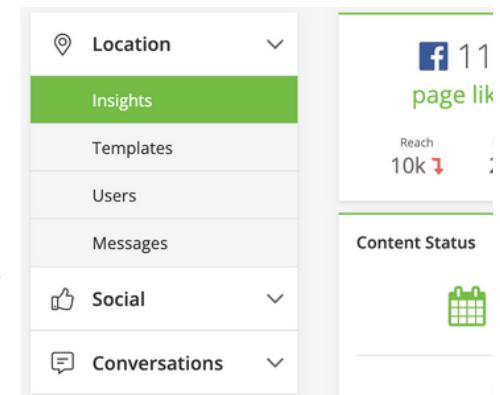
DASHBOARD

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 single-location owners



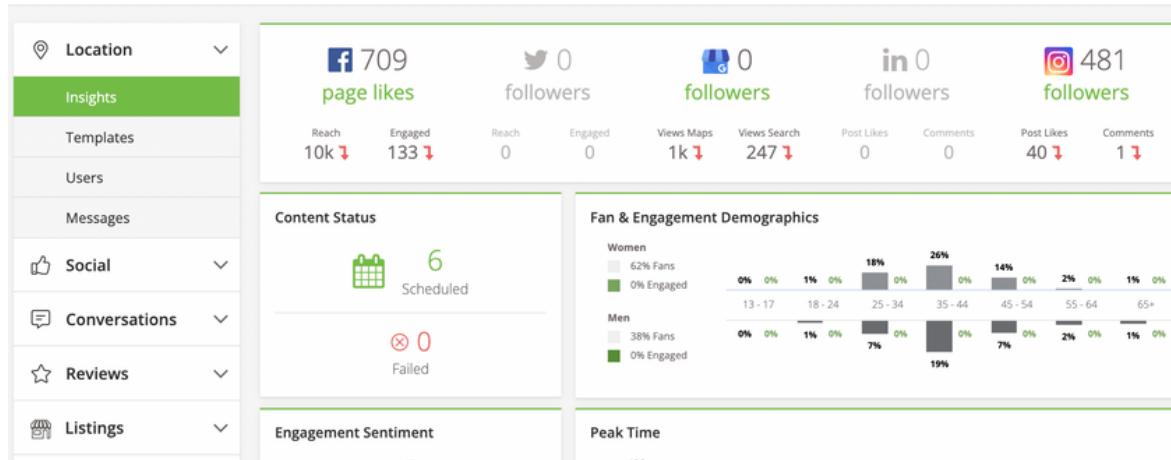


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INSIGHTS DASHBOARD

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

The screenshot shows the SOCi interface with the 'Notifications' tab selected in the left sidebar. The main content area displays a list of errors and warnings. The top right corner of the main content area contains two small icons: a checkmark and an envelope. A red arrow points to the envelope icon, indicating where the user should click to set up email notifications.

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.

The screenshot shows the 'Create Email Subscription' form. The 'Location' section is highlighted with a red box, showing 'Everything SOcial' selected. The 'Notifications' section contains several categories with checkboxes and dropdown menus:

- Errors & Warnings: All types
- Engagements: Facebook Private Message, Facebook Comment
- Content: All types
- Ads: All types
- Reviews: All types
- Review Responses: All types

A summary box at the bottom lists the selected notifications:

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

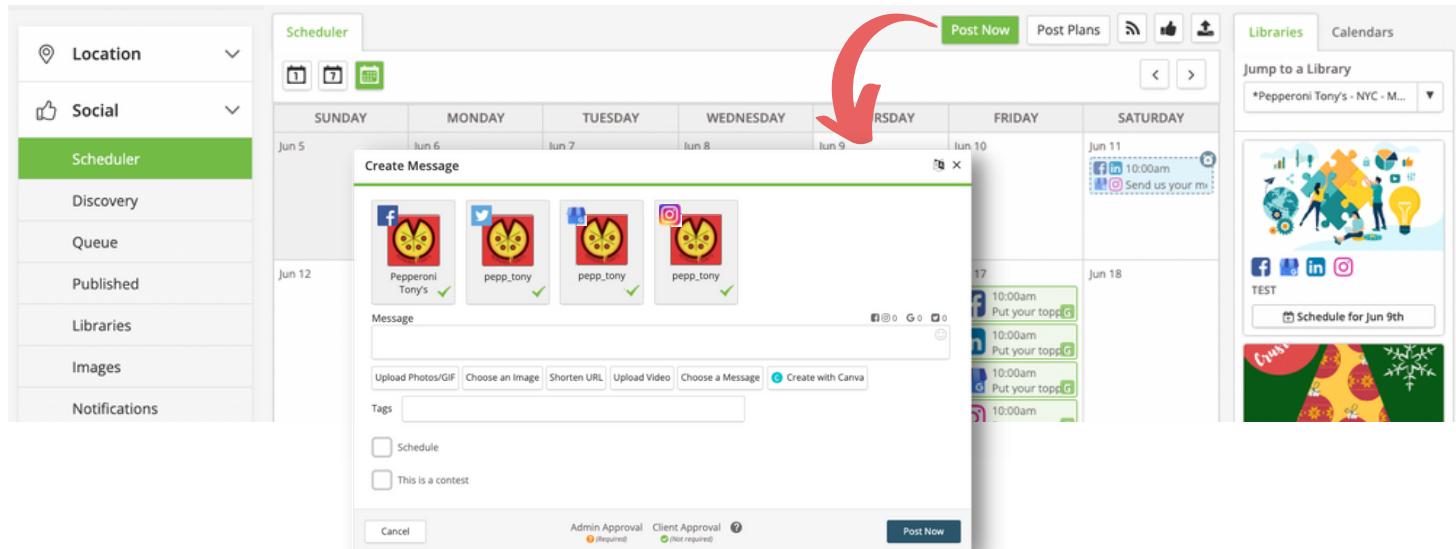
This is where you can view, edit, and create immediate or future posts. The scheduler is a great place to view what content has already been scheduled out so you can determine what needs to be added.

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 shows the SO Ci platform's Library section. On the left, a sidebar navigation includes 'Location', 'Social' (selected), 'Scheduler', 'Discovery', 'Queue', 'Published', 'Libraries' (selected), 'Images', 'Notifications', 'Conversations', and 'Reviews'. The main area displays a grid of 'Pinned Libraries'. Each library card includes a thumbnail image, a category name, and a green 'View' button. Below the cards is a summary table with totals (4, 1, 0, 21, 1, 1, 9, 1, 1, 19, 1, 4) and a message count (19 messages found). A red arrow points to a specific post in the grid, which features a pizza image and the text: 'It's officially summer in (%city), which means fresh summer ingredients! Stop by (%Location) to enjoy some delicious pizza!'. The post is dated Jun 8th, 2022.

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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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.



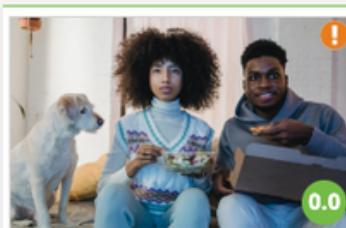
Take advantage of {Special} at {Location} today. Visit {Website URL} to learn more and get some!

Jun 7th, 2022



Put your toppings together in a beautiful, fresh salad. Now offering {Special} when you buy a meal!

Jun 7th, 2022



Don't forget about Fido! Order more at {Location} with this great deal: {Special} {Location Hashtags}

Jun 2nd, 2022



Come on down to enjoy the famous Pepperoni Tony's Pizza at {Address} while watching some great sports!

May 19th, 2022





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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.

The image shows the SOCi Scheduler interface. On the left is a sidebar with dropdowns for Location, Social, and Conversations, and buttons for Scheduler, Libraries, and Calendars. The Scheduler section is active, showing a weekly calendar grid for June. Each day has a list of scheduled posts with icons for Facebook, Instagram, and LinkedIn. The posts are categorized by time (e.g., 7:00am, 9:00am) and content (e.g., "Paint and cr", "Match the bi"). A red box highlights the "Calendars" tab in the top right of the sidebar, and a red arrow points to a larger view of the "Calendars" interface on the right, which shows a list of available calendars and a "Subscribe" slider.

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

The image shows the SOCi Scheduler interface with a weekly calendar grid for June. The sidebar on the right has tabs for Libraries and Calendars, with the Calendars tab active. A red arrow points to the "Subscribed" slider in the Calendars sidebar, which is currently turned off (indicated by a grey circle). The main calendar grid shows scheduled posts for various days and times, with icons for Facebook, Instagram, and LinkedIn.



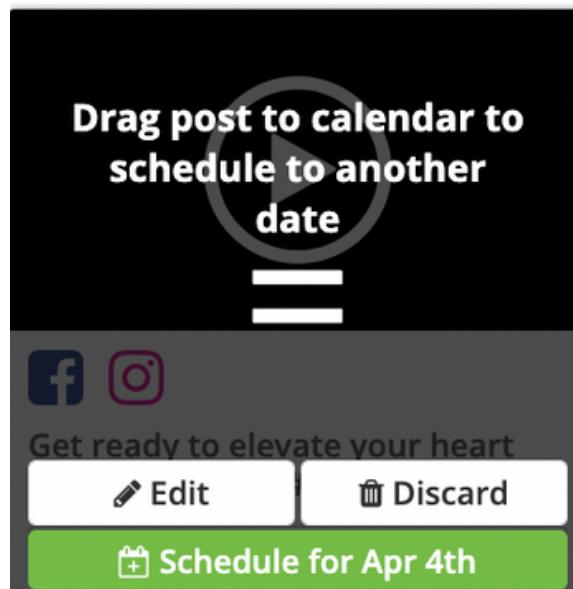
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EDIT OR DISCARD POSTS

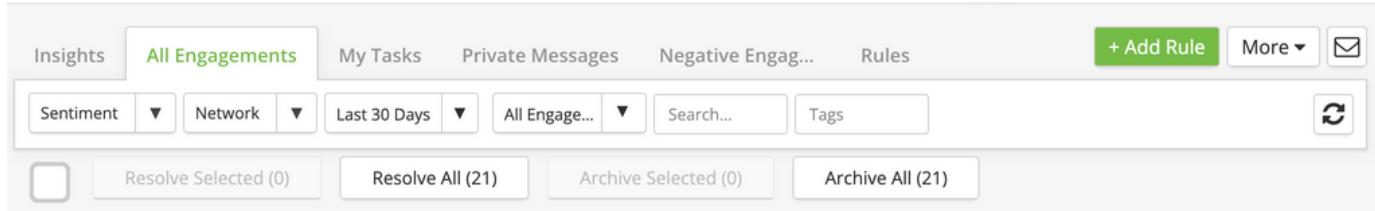
If you would like to edit a post you can either select into the post on the scheduler or select **Edit** from the Library side bar.

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 shows the SO Ci platform interface. On the left, a sidebar menu includes options like Location, Social, Conversations, Insights, Engagements (which is selected and highlighted in green), Rules, Reviews, Listings, and Reports. Below this is a Location details section. The main content area has a header with tabs: All Engagements (selected), My Tasks, Comments, Private Messages, Negative Engag..., and a More dropdown. Below the header are filters for Sentiment, Network, Last 30 Days, All Engage..., Search, and Tags, along with buttons for Resolve Selected (0), Resolve All (23), Archive Selected (0), and Archive All (23). The main list shows engagement items, with the first one highlighted. A red circle with the number 1 is on the 'Reply' button. A red circle with the number 2 is on the 'Templates' dropdown. A red circle with the number 3 is on the 'Localize' dropdown. To the right, there are 'Respond' buttons and a list of response templates: Corp Approved - 1-3 Star Reviews, Corp Approved - 4-5 Star Reviews, Brand Demo Account (Default) Responses To Negative Engagements, and Brand Demo Account (Default) Responses to Positive Engagements.

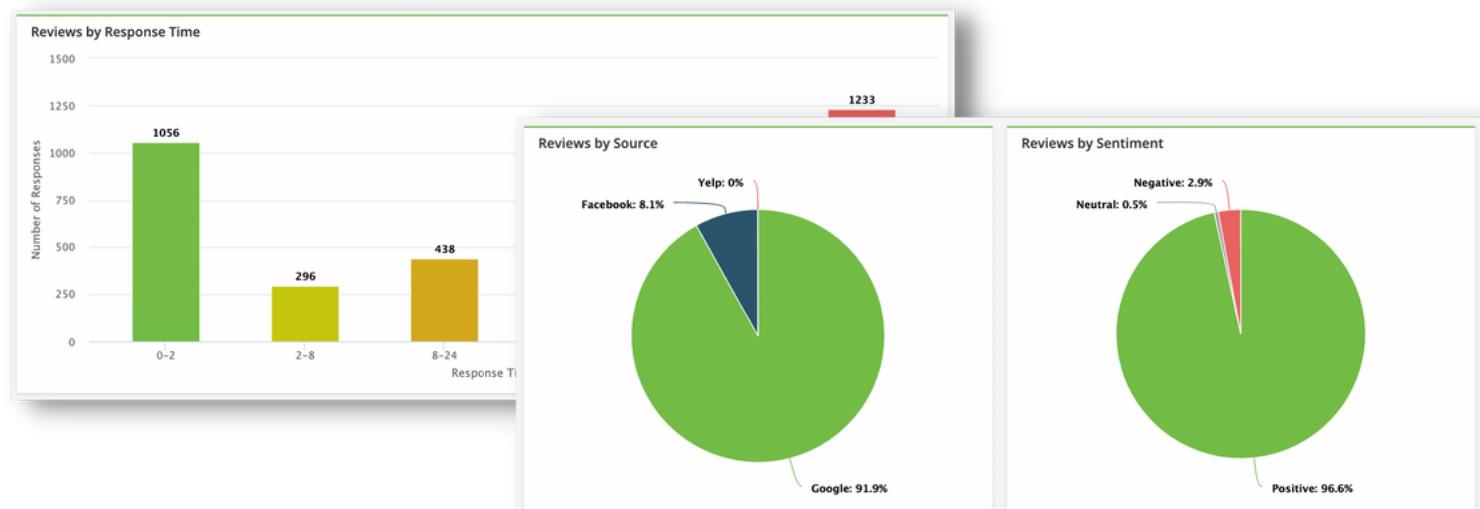
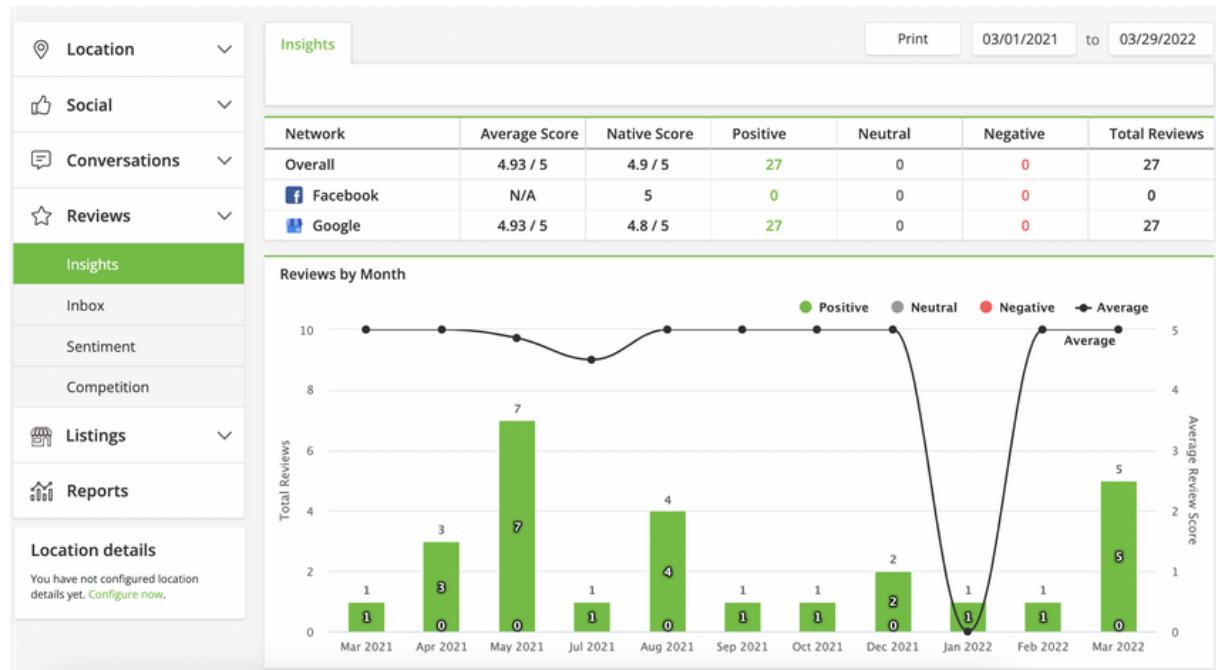


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REPUTATION FROM THE INSIGHTS DASHBOARD

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 SO Ci platform interface for responding to reviews. On the left, a sidebar navigation includes: Location, Social, Conversations, and Reviews. The Reviews section is currently selected. The main content area shows the **Inbox** tab with 447 new reviews. A specific review from user **Amanda** is highlighted, showing a **positive** rating for **Salem**. The review text reads: "I love this place sooo much! Everyone should go." Below the review, a message states: "No response yet". A red arrow points from this message to a red circle labeled **3** on a floating window titled "Respond To Amanda". This window contains a "Templates" tab (selected) and an "Activity" tab. The "Templates" tab lists several options: "Corp Approved - 1-3 Star Reviews", "Corp Approved - 4-5 Star Reviews", "Brand Demo Account (Default) Responses To Negative Engagements", and "Brand Demo Account (Default) Responses to Positive Engagements". A red circle labeled **1** is placed over the first template. A red circle labeled **2** is placed over the "Generate Response" button. A red circle labeled **4** is placed over the "Localize" dropdown menu. The bottom of the window has "Close", "Mark Resolved", and "Send Response" buttons. The background shows a list of other reviews with their respective dates and "Respond" buttons.

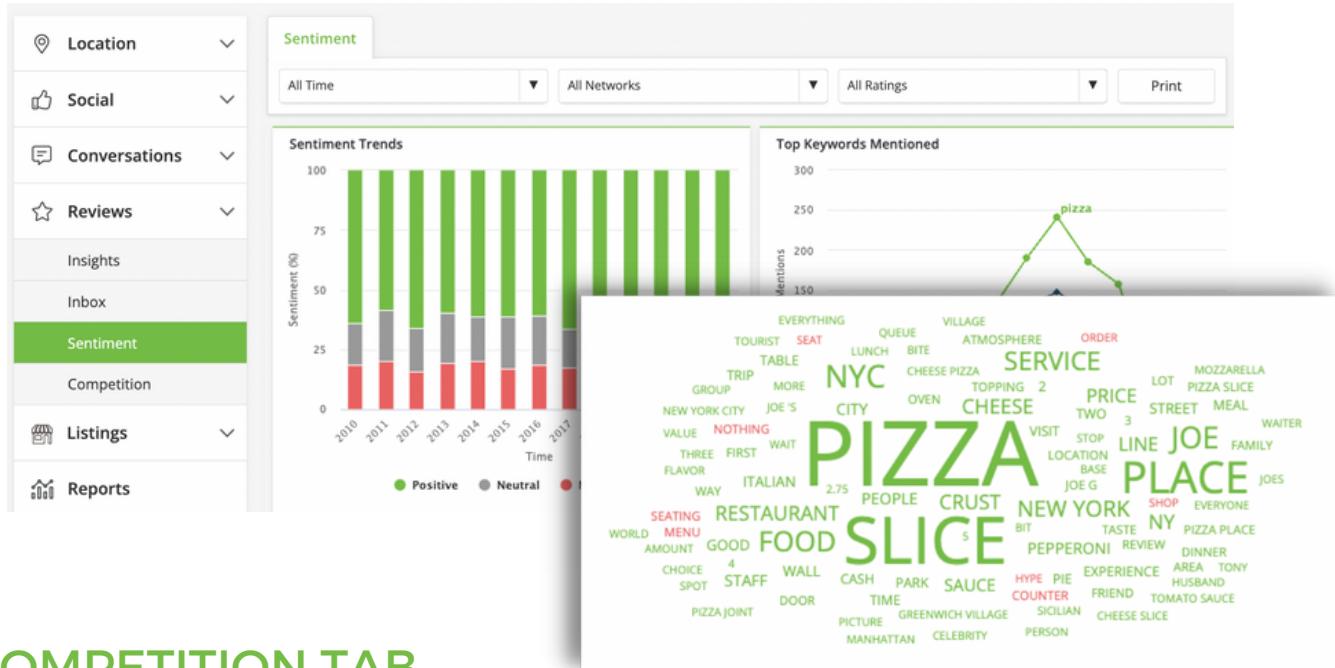


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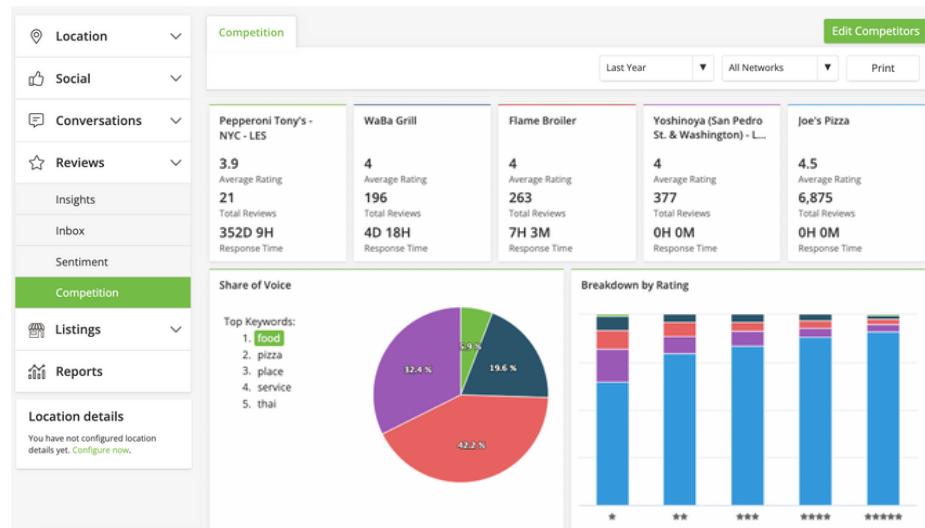
SENTIMENT TAB

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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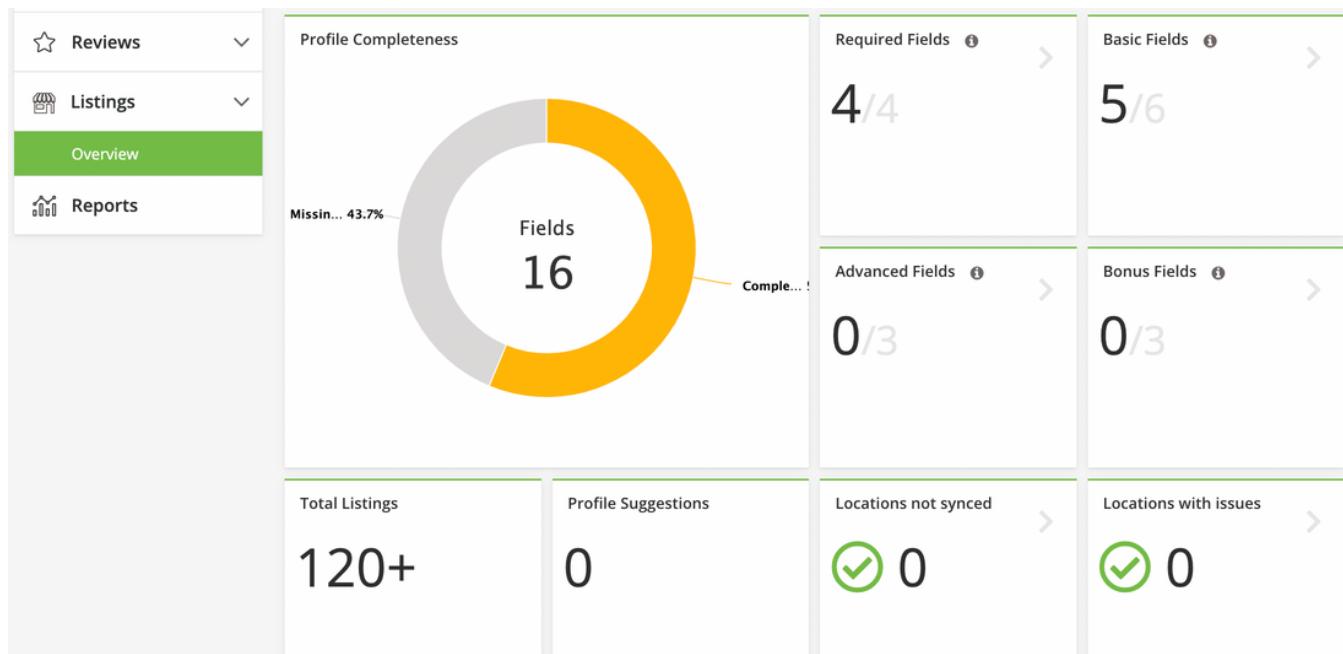
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LISTINGS OVERVIEW

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





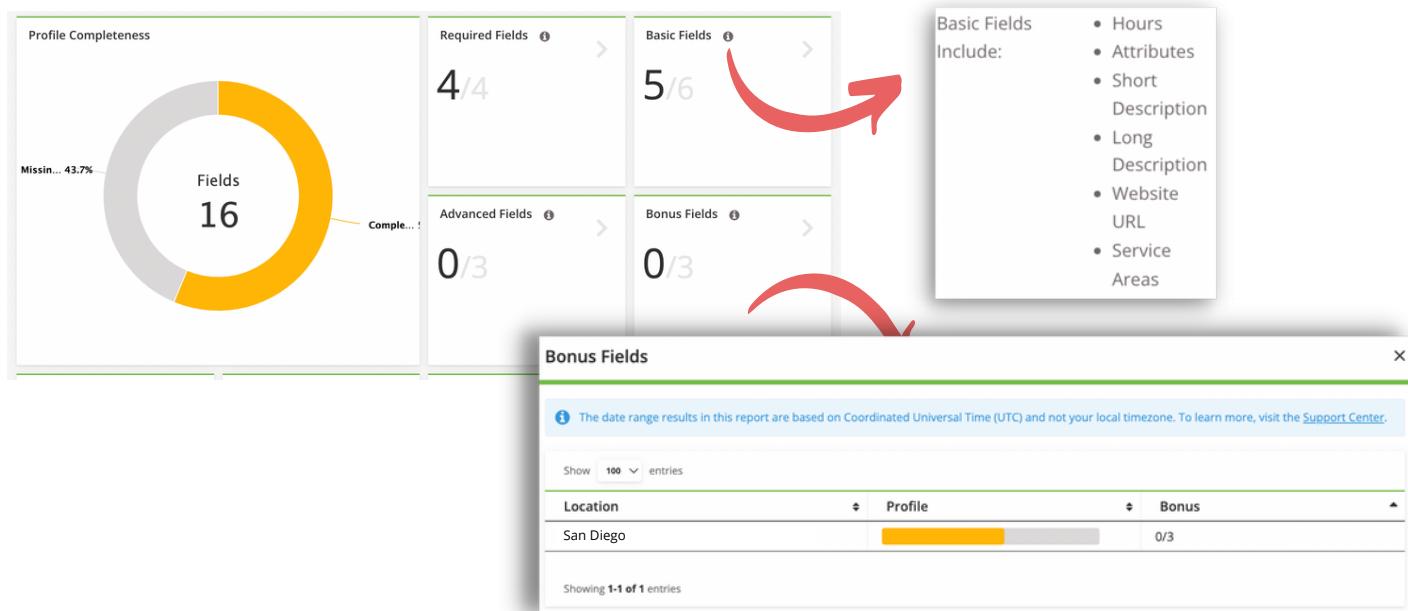
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PROFILE COMPLETENESS CHARTS

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**

The image shows a screenshot of the SOCi dashboard. At the top, there is a navigation bar with a search bar and a user profile icon. Below the navigation bar, there is a section titled 'SOCi User Guide' with a sub-section 'Your Go-To Resource for Navigating the Platform'. The main content area is titled 'UPDATE YOUR LISTINGS INFORMATION'. Below this, there is a list of steps to update listing information. The screenshot shows the 'Listings' table and an open 'Listings' edit dialog. The 'Listings' table has columns for 'Location', 'Profile', and 'Bonus'. The 'Location' column shows 'San Diego'. The 'Profile' column has a yellow progress bar at 100% completion. The 'Bonus' column shows '0/3'. Below the table, it says 'Showing 1-1 of 1 entries'. A red arrow points from the 'Listings' table to the 'Listings' edit dialog. The 'Listings' edit dialog has tabs for 'Profile' (which is selected), 'Hours', 'Categories & Attributes', 'Custom Fields', 'Approvals', and 'Images'. The 'Profile' tab shows fields for 'Internal Name' (San Diego) and 'Listings Name' (San Diego Clinic). The 'Address Line 1' field contains '555 South Main Street'. The 'Address Line 2' field contains 'Suite A'. The 'City' field contains 'San Diego'. At the bottom of the dialog are 'Cancel', 'Delete', and 'Save' buttons. A red arrow points from the 'Listings' table to the 'Listings' edit dialog. A red arrow points from the 'Listings' edit dialog to the 'Save' button.



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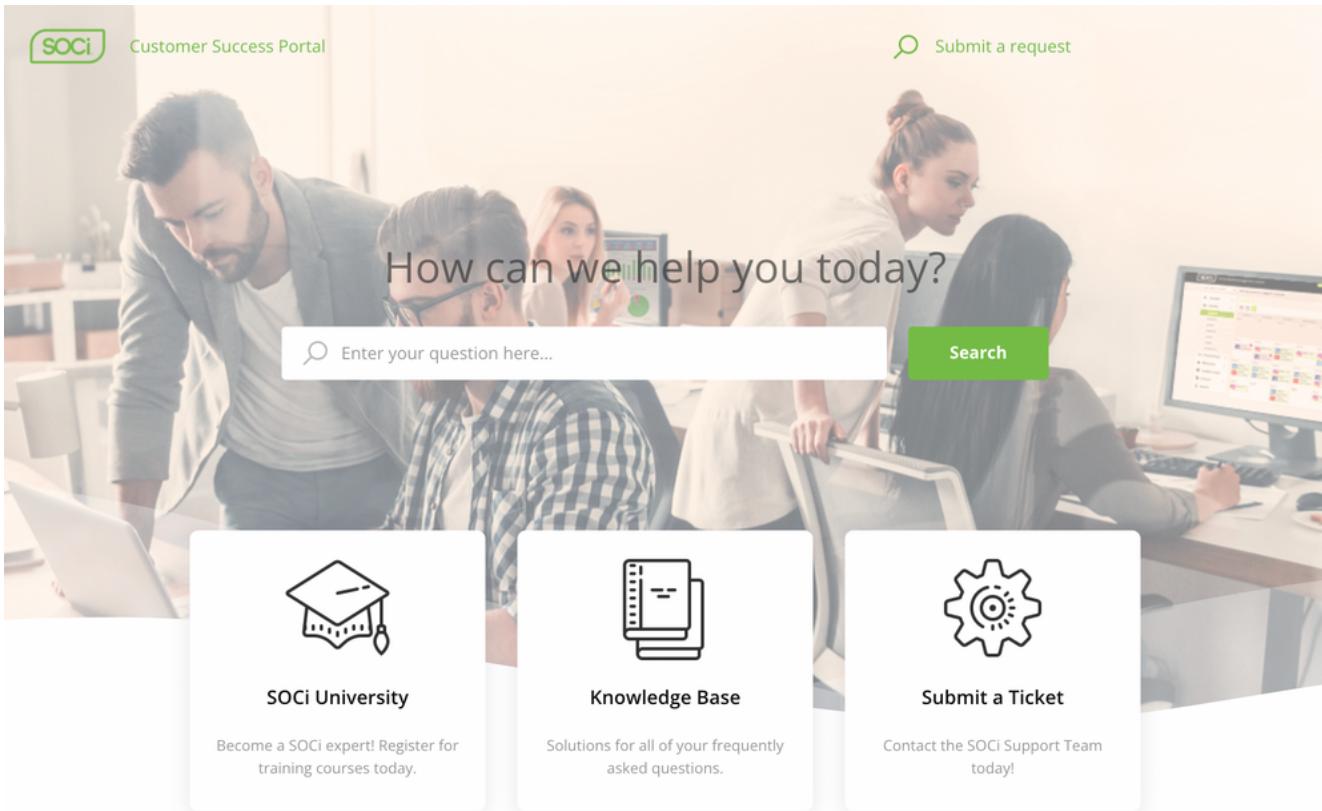
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SUPPORT RESOURCES

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.



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.