



# Social Media Management

Version 1.2

## Table of contents

Getting started .....	3
Logging in .....	4
Managing users .....	4
Setting up profiles .....	5
Integrating social media channels .....	5
Workbaskets .....	6
Creating rules .....	7
Adding schedules .....	8
Unibox .....	9

# Getting started

Manage all your social media from one place. Social Media Management is the easiest way to monitor all your social media channels, engage with customers in real-time, and analyze social media performance.

Instantly know what people are saying about your company across all major social media channels, including YouTube, Twitter, Facebook, Instagram, Tumblr, and more. You can also create content on your time and schedule it to publish when your audience is most active.

The screenshot displays the Nextiva social media management interface. On the left, a vertical sidebar contains navigation icons for home, messages, and a grid of social media channels. The main content area is divided into three sections:

- Left Panel (Messages):** A list of incoming messages. The top message is from 'pawsy-commons-pet-hotel' with the text: "Hey, Good to know that you are interested in our products. We would be launching few". Below it is a tweet from 'Morgan Gorman' (@MorganGorman22) stating: "Oreo was bit by another dog while at @PawsyCommons. I wish they would have done more to keep aggressive dogs away from the angels like my Oreo. <https://t.co/kDYo5vLam>".
- Center Panel (Twitter Post):** A detailed view of the tweet from Morgan Gorman. It shows the user's profile picture, name, and handle. The tweet text is: "Oreo was bit by another dog while at @PawsyCommons. I wish they would have done more to keep aggressive dogs away from the angels like my Oreo. <https://t.co/kDYo5vLam>". It indicates 0 retweets and has a 'More' dropdown menu. Below the tweet is a direct message from 'PawsyCommons' to '@MorganGorman22' with a text input field and a 'Send Later' button.
- Right Panel (User Profile & Case Details):** The profile of 'MorganGorman22' is shown, including their profile picture, name, handle, and statistics (2 Tweets, 13 Following). Below the profile is a 'Case Details' section for case #RKS1-42, assigned to 'Social-Benjamin'. It shows the case status as 'In-Progress', the start time as '08:54 AM Sun, Jan 29', and a priority level of 'HIGH'. A 'Case History' section below shows the tweet as the starting point of the case.

# Logging in

To log into the Social Media Management portal, visit [nextiva.simplify360.com](https://nextiva.simplify360.com) or [click here](#).

# Managing users

Invite teammates and staff to help manage and create custom social media content, including the ability to instantly reply to posts on social media – all from one place.

## Adding users

From the main dashboard, click **Settings > Users > + Add user** and enter the required information, including the user's Role Type (Admin, Member, Viewer) and timezone. Click **Save**.

The screenshot shows a 'USERS' management page with a table of users. The table has columns for Name, Short Name, Email, Role, Last Logged In, and Action. There are 10 users listed, each with a checkmark in the first column and three icons in the Action column. The users are: Benjamin Litke (Social Plus), Dana Gilday (OWNER), Miles Christopher (Social Plus), Tallon Fish (ADMIN), Taylor Brown (SUPER ADMIN), Chinmay Bassi (SUPER ADMIN), Sarah Lopez (ADMIN), Garrett Dee (Social Plus), Ray Nordstrom (SUPER ADMIN), and Tomas Hernandez (ADMIN). The page also includes a search bar, a 'Show 10 entries' dropdown, and a 'Showing 1 to 10 of 108 entries' footer.

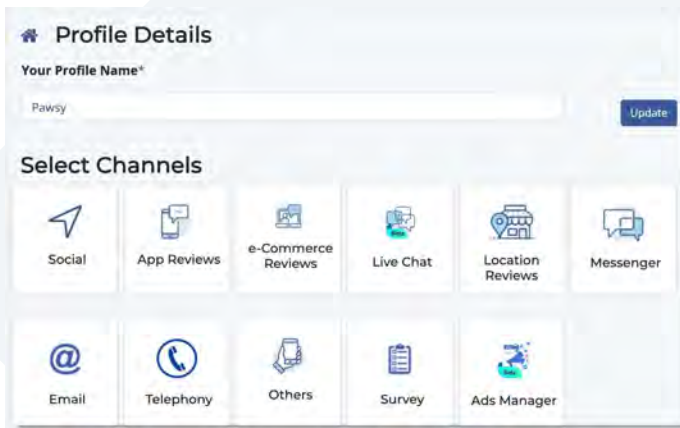
	Name	Short Name	Email	Role	Last Logged In	Action
<input type="checkbox"/>	Benjamin Litke	Benjamin	benjamin.litke@pawtsy.com	Social Plus	05:35 PM Wed, Mar 29	
<input type="checkbox"/>	Dana Gilday	Dana	dana.gilday@pawtsy.com	OWNER	05:43 PM Wed, Mar 29	
<input type="checkbox"/>	Miles Christopher	Miles	miles.christopher@pawtsy.com	Social Plus	05:33 PM Wed, Mar 29	
<input type="checkbox"/>	Tallon Fish	Tallon	tallon.fish@pawtsy.com	ADMIN	04:51 PM Wed, Mar 29	
<input type="checkbox"/>	Taylor Brown	Taylor	taylor.brown@pawtsy.com	SUPER ADMIN	05:45 PM Wed, Mar 29	
<input type="checkbox"/>	Chinmay Bassi	Chinmay	chinmay.bassi@pawtsy.com	SUPER ADMIN	08:09 PM Tue, Mar 28	
<input type="checkbox"/>	Sarah Lopez	Sarah	sarah.lopez@pawtsy.com	ADMIN	07:43 PM Mon, Mar 27	
<input type="checkbox"/>	Garrett Dee	Garrett	garrett.dee@pawtsy.com	Social Plus	08:05 PM Wed, Mar 22	
<input type="checkbox"/>	Ray Nordstrom	Ray	ray.nordstrom@pawtsy.com	SUPER ADMIN	02:01 PM Wed, Mar 22	
<input type="checkbox"/>	Tomas Hernandez	Tomas	tomas.hernandez@pawtsy.com	ADMIN	11:00 PM Tue, Mar 21	

## Resetting passwords

As an administrator you can always change user's passwords, or anyone can reset their password via the Forgot Password option from the main login page. To reset a user's password, click **Change Password** under Users and enter the new password. Click **Update**.

## Deleting users

Click the check-box next to the user(s) and select **Delete Users** at the top. Click **OK** to confirm.



## Setting up profiles

From the home screen, click the **Menu** icon on the top left and select **Settings > Profile Management**.

Click **+ Create Profile** and enter a name for the new profile. Click **Create**.

### Sharing profile access

Under **Profile Management**, click the **Pencil** icon to the right of the profile and select **Share** under **Others**.

Search for the user and select the radio button under the **Access** and click **Update**.

## Integrating social media channels

Under the profile settings, select **Social** and select from the supported social media platforms (Twitter, Facebook, YouTube, etc.).

Click **Add Channels** and select to **Add as Admin**. Enter your account credentials and follow the prompts to complete the integration.



You can also add channels as Non-admin channels to keep track of other influencer's or competitors, for example.

# Workbaskets

Create Workbaskets aka teams to route customer interactions to the right group of users. For example, you can create workbaskets for specific departments so interactions are routed to the correct team based on business hours or specified keywords.

## Creating workbaskets

From the main dashboard, click **Settings > Profile Management > Edit Profile > Workbaskets > + New Workbasket**. Enter a name, description (optional), and select the users you would like to assign to the workbasket by selecting the Access button.

You can also manage the user role (Workbasket Admin/Agent) from here. Workbasket Admin is allowed to send replies directly without any approval, whereas, Workbasket Agent has to be approved by a Workbasket Admin.

**NOTE:** You can also assign users to Workbaskets under Users (**Edit User Access > Add roles to Workbasket**).

Workbasket Name\*

Workbasket Description

Select Users

Show  entries Search:

Share Profile	↕	User Details	↕	Access	↕
demo@nextiva.com		WORKBASKET ADMIN		<input checked="" type="checkbox"/>	

# Creating rules

Use the Organizer to create personalized rules used for automation. Below are a few examples of how you could take advantage of this tool.

- Auto-route tickets to the most qualified team members
- Auto-response based on keywords found in the message
- Auto-response to acknowledge the post was seen
- Auto-tag messages
- Business/after-hour routing (send tickets to the California team 5AM-9PM and to the New York team 9PM-5AM)

Under **Organizer**, you can manage and create new rules. To create a new rule, click **Create** and enter a name.

Set the rule priority for sending auto-response/assignment (Optional).

Priority is measured on a scale of 0 to 300, where a higher number is associated with higher priority. If two or more rules match, the higher priority rule is triggered.

Set up the Rule Activity Time. You either choose “Always” or “Custom”.

Organizer Name\*

Fast Assignment

Add priority to rule

**Prioritize every rule that needs utmost preference while sending auto-responses/assignment when two or more rules matches the same conversation. If rule priority is not defined, then messages matching with any of the rules can get triggered & if priority is defined, then the rule will get applied based on higher rule priority.**

**Note: define the rule priority up to 300, the highest number gets a higher priority & you can set a maximum of 300 rules in one priority.**

Rule Activity Time  
This is the time when rules will run based on the schedule designed in your holiday calendar.

Always  Custom

Rule Condition  
Define the condition for which the rules will run for the below sources and select the actions to perform once the messages match the rule criteria.

**IF**

Add a rule for the following source:

**THEN**

Add an Action to be applied for above rule sets:

Define the condition for which the rules will run by selecting the source and the action to perform if the rule criteria is met. For example, if anyone sends you a message via Facebook, you can have it automatically send a response back confirming their message was received. Click **Save**.

## Adding schedules

You can set up a schedule with your business hours and holidays for specific profiles to follow custom rules, such as automatically sending a predefined response during specified holidays and outside business hours.

From the main dashboard, click **Settings** and **select** **Holiday Calendar** > **+ Add Calendar**.

Enter a name for the new calendar (required), description (optional), time zone (required), and the profile(s) to associate the calendar with.

To add a holiday, click **+ Add Holiday** at the top right corner, select the date and holiday name or reason. Click **Save** and select the make sure to select the **Apply only on holiday** check box.

Enter the start and end time for each day, and you can also add breaks by selecting **Plus (+)** to the right of the end time. Click **Save**.

**HOLIDAY CALENDAR** + Add Holiday

SETTINGS / HOLIDAY CALENDAR / EDIT CALENDAR

Calendar Name  
AZ business hours

Description  
Business hours for Arizona locations

TimeZone  
( GMT-8:0 ) Pacific Daylight Time ( US/Pacific )

Select Profile  
Nextiva \* Communication \*

Apply Only on Holiday

Working Hours

<input type="checkbox"/> Sunday	Start time	End time
<input checked="" type="checkbox"/> Monday	06:00	18:00
<input checked="" type="checkbox"/> Tuesday	06:00	18:00
<input checked="" type="checkbox"/> Wednesday	06:00	18:00
<input checked="" type="checkbox"/> Thursday	06:00	18:00
<input checked="" type="checkbox"/> Friday	06:00	18:00
<input type="checkbox"/> Saturday	Start time	End time

Save Cancel

April 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					



# Unibox

Instantly view and respond to customer interactions for all integrated social media channels from one inbox.

From the main dashboard, click **Unibox** to view all tickets. By default, the main tab shows all cases aka tickets you are assigned to or associated with so you can easily view and respond.

You can filter tickets based on the status (assigned/reassigned, approved, etc.) using the status drop-down at the top or by selecting the **Filter** icon. You can also filter tickets based on the profile, dates, sources (channels), and more. To save filters, click **Save filter** at the top.

Select the ticket to view the customer interaction. Select **Click here to start working on this case** on the bottom right to respond. You can also add notes to the interaction. Edit and format the text to match your brand, including the option to include attachments and emoji. Reply now or schedule it to send later.

At the top of the conversation thread, you can assign the ticket to specific workbaskets or users, including the option to update the case status. You can also schedule a follow up date from here. The other tabs at the top allow you to view and filter all tickets associated with the profiles you have access to and any saved filters.

