



Walk-Through Guide

SchoolMessenger

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Table of Contents

The Dashboard	3
Signing In	4
Setup Wizard	4
Browser Bookmarklet	4
Services – Add your Social Profiles	5
Composing Messages	5
Compose Message –Composing social media content	6
Attach – Adding media, links, etc. to your post.....	6
Schedule Posts – Setting a date and time for posts to go live	7
Queues – Queue your posts	7
Additional Content – Add additional content to posts	7
Engage – Interacting on your social platforms	8
Profile Information	9
Engage – Your Inbox, Outbox and Follow ups	10
Monitor – Keyword and reputation monitoring	11
Keyword Monitors	11
Review Site Monitoring	12
Search – Real time search on Facebook & Twitter	13
Measure	14
Report Builder	14
Quick Reports – Create a quick report	15
Export – Export reports for further analysis.....	15
Manage	16
New Services List – Group your Social Media Services	16
Contacts – Manage your Social CRM	16
Content – How to add new content	16
Admin – Controlling user and admin settings	16
Settings – Control your Settings and Preferences	19

The Dashboard

Below are the main areas of your Social Media Dashboard, for each area we have noted the section of the Walk-Through Guide and the corresponding page.



Page 8 Page 11 Page 14 Page 16 Page 5

ENGAGE MONITOR ▾ MEASURE MANAGE ▾ + SERVICES ▾

SCHOOLMESSENGER - ADMIN ▾

Switch between users

Page 4 Page 19

1:36 PM SCHOOLMESSENGER - ADMIN Administrator COMPOSE

INBOX 0 EXPORT TO CSV NEW STREAM Channel filter Search

OUTBOX

- Sent
- Scheduled 0 (0)
- Queued
- Suggested
- Drafts
- Calendar
- Bounced

FOLLOW UP

- For me 0
- For others
- Completed

19 hours ago

JAKE TAKAHASHI 4:52 PM - TEQUAISD
@TequaISD: STOP having the North High marching band practice at Holt Park!!! I live across the street and the noise is deafening!!!!

14 days ago

STEPHEN ANDERSEN 8:27 AM - TEQUA ISD
Great looking group!

15 days ago

NELSON BARNES 8:22 AM - TEQUA ISD
Why wasn't I asked for permission before this picture of my kid was posted?

LONELYCINAROLL 7:48 AM - TEQUAISD
@tequaisd i know whos been vandalizing north high who do i tell

a month ago

JAKE TAKAHASHI 10:02 AM - TEQUACENTRAL
@TequaCentral: I requested a copy of my transcript last week but it still hasn't been sent. Can you look into this?

LONELYCINAROLL 10:01 AM - TEQUAISD
@tequaisd what should i do if im being bullied

PRIORITY INBOX

FACEBOOK PAGE STREAM

- Tequa ISD
- Tequa ISD Elementary
- Tequa ISD High School
- Tequa ISD Middle School

TWITTER SEARCH

- tequa

TWITTER STREAM

- tequaisd Mentions
- TequaISDHigh Mentions

Search

Search the entire platform

COMPOSE

Page 5

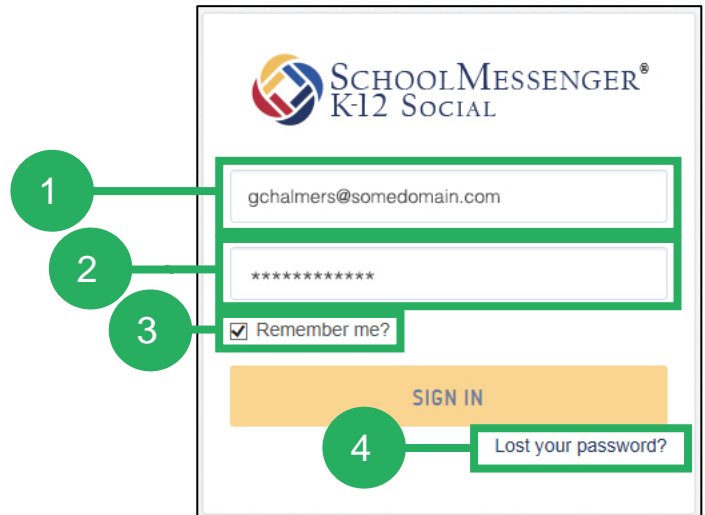
Signing In

To sign in to K-12 Social, go to k12social.schoolmessenger.com/.

Add your **(1) Username** and **(2) Password**.

(3) Remember me? will auto-populate your username and password next time you visit the page. Please be aware that this will log you in automatically on each visit, so be cautious when using this option on a public or shared computer.

(4) Lost your Password will enable you to reset your password via the email linked to your account.

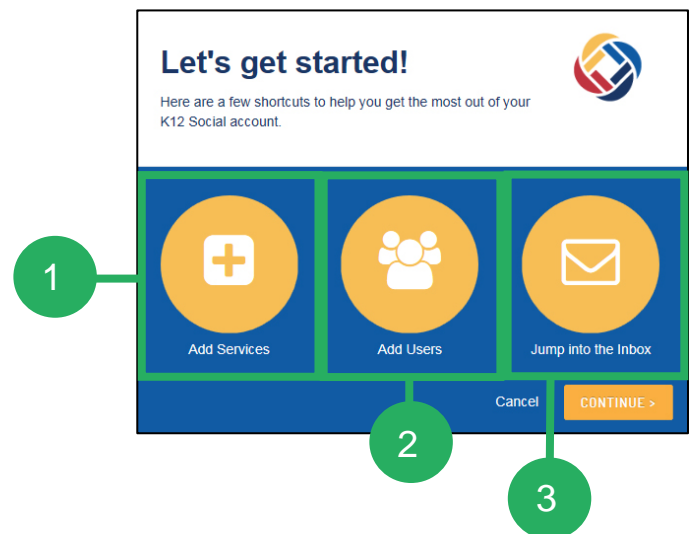


Setup Wizard

Once logged in you will be able to use the **(1) Setup Wizard**, which can also be found on the top right of your screen.



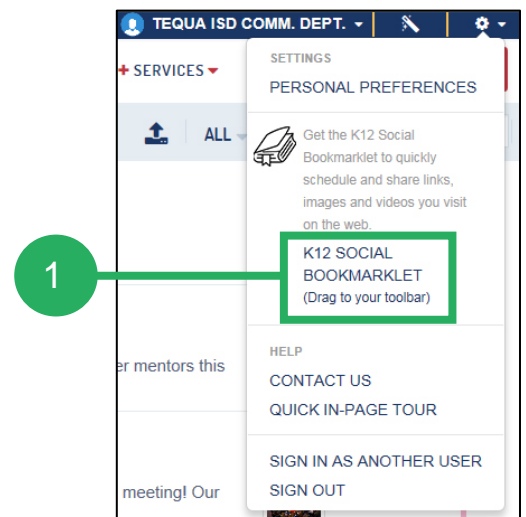
The Setup Wizard will take you through **(1) Adding Services**, **(2) Adding Users** and going straight to your **(3) Priority Inbox**. We will show you how to use these separate areas throughout this Quick Start Guide.

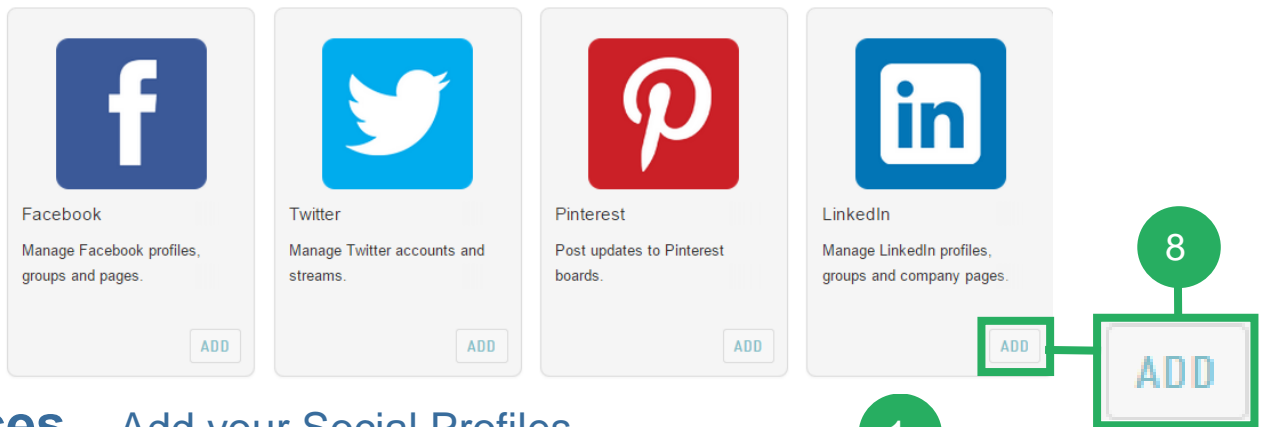


Browser Bookmarklet

The Browser Bookmarklet allows you to post content from any website you are browsing.

(1) Drag and drop the icon onto your browser toolbar to install. Once installed, the corresponding logo will appear on your browser toolbar. From any webpage with sharable content, simply click the bookmarklet icon and it will pull the URL and additional content in, along with a thumbnail, ready to post to your social networks.





Services – Add your Social Profiles

The Services area allows you to integrate your social media services with K-12 Social.

There are a variety of **(1) Social Media Services** that you can add, these have been grouped for convenience. Choose from the most popular social media sites as well as additional services and apps such as Facebook, Twitter and LinkedIn, or choose by area i.e. **(2) Social, (3) Blogs, (4) Photo & Video, (5) Bookmarking, (6) Monitoring, (7) Apps.**

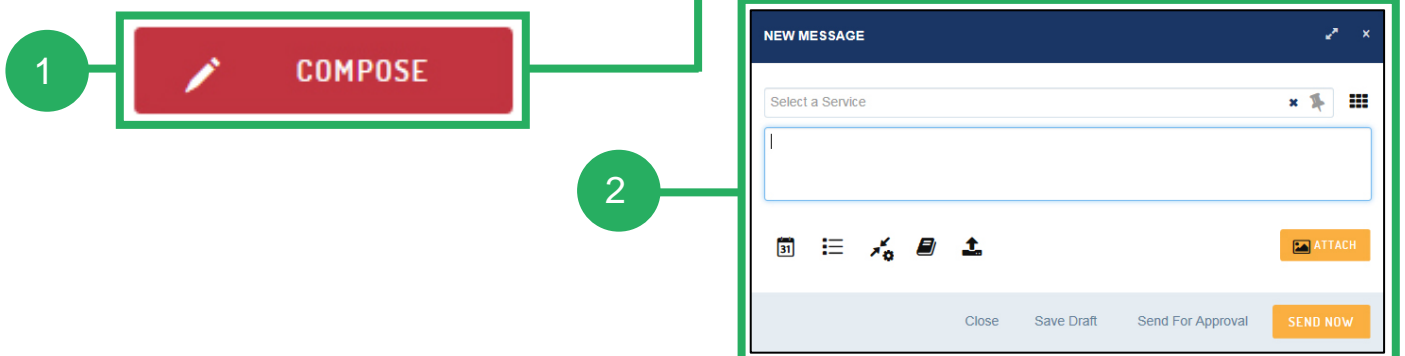
These can simply be added and integrated with by clicking the **(8) Add button** on the service with which you wish to integrate with. It will then prompt you for your corresponding login details and for your permission to authenticate with these social networks. Please see Page 21 for a quick example of how to set up a Facebook Fan Page



Composing Messages

The **(1) Compose button** will always be on the top right of your dashboard regardless of where you are on the K-12 Social Platform.

Once the Compose button is clicked, a pop-up box will appear where you can start to **(2) Compose your message** to be posted on one or multiple social media sites at once.

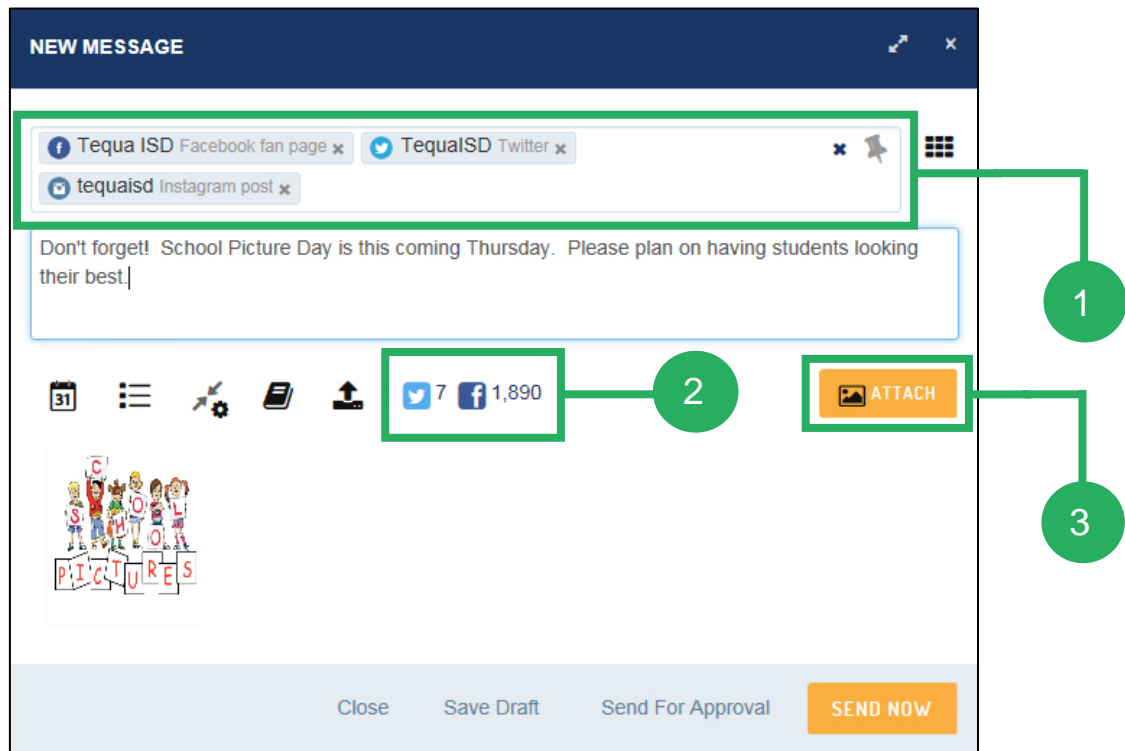


Compose Message

Select a **(1) Social Network** or multiple networks you would like to post to.

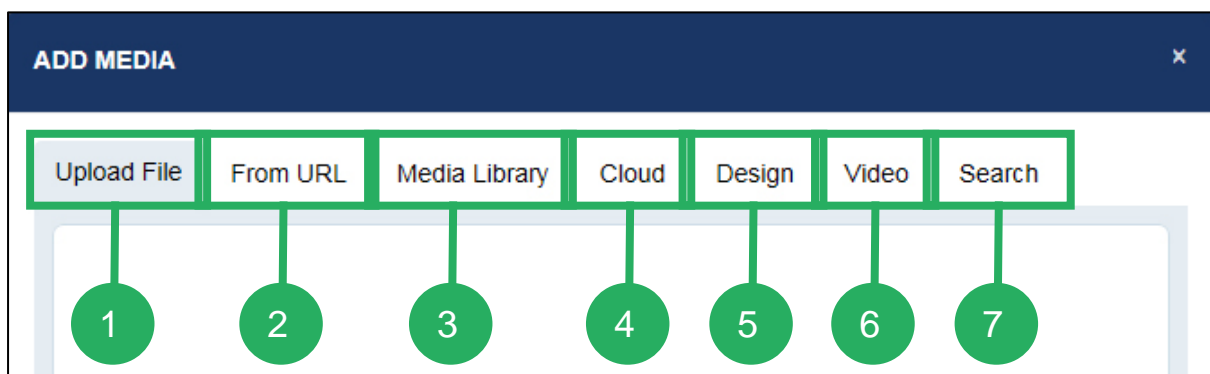
The **(2) character count** for that particular social network will appear if relevant.

Compose your message. Any URL will be automatically shortened and a preview will be shown below. If you'd like to add additional content to your post, you can do so by clicking **(3) Attach**.



Attach – Adding images, links, files, etc. to your post

(1) Upload a file to attach, source an **(2) image from a URL**, choose content from your **(3) Media Library**, choose content from the **(4) Cloud** (Dropbox and Google Drive). K-12 Social also has Canva integration giving you a full **(5) design** suite to create a range of design assets such as Facebook covers and Pinterest posts. Attach a YouTube **(6) video** or **(7) search** for an image via Google or Flickr.



Schedule Posts

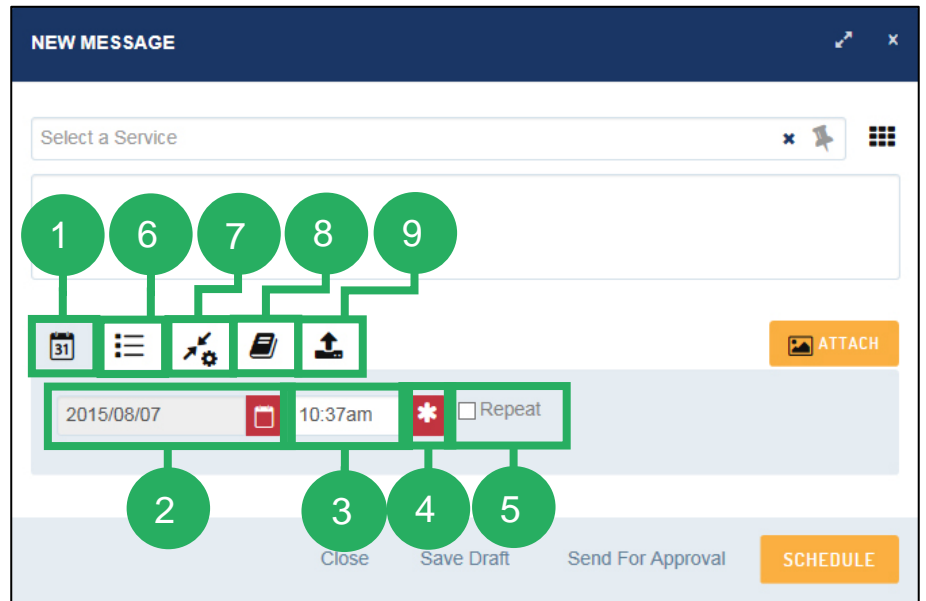
(1) Clicking the calendar icon will allow you to schedule your post by (2) date, (3) time, (4) set optimal time (K-12 Social uses an algorithm to know when is the most optimum time to post to your networks), or (5) repeat your messages.

Add your message to a (6) queue.

(7) Shorten links for tracking purposes and reduce character count.

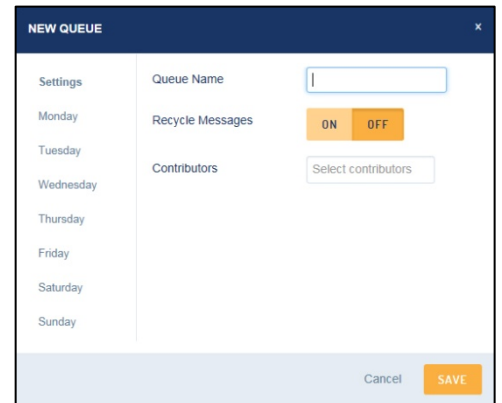
(8) Add additional content such as RSS Feeds, trending hashtags and place holders.

(9) Bulk upload your messages.



Queues – Queue your posts

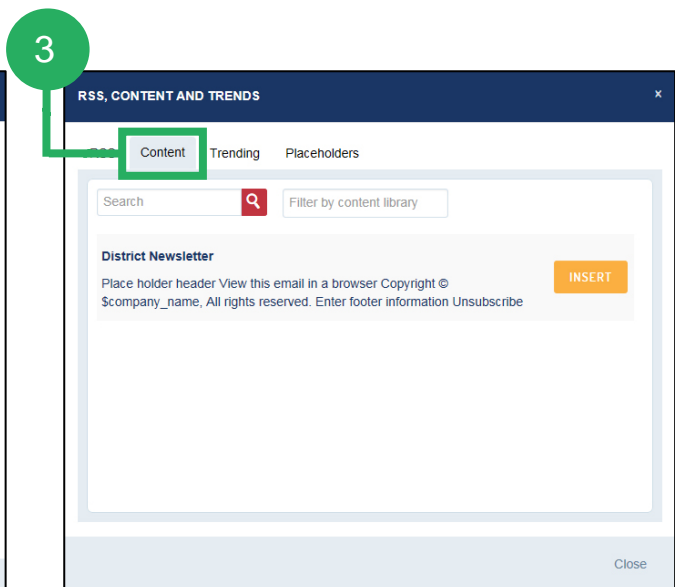
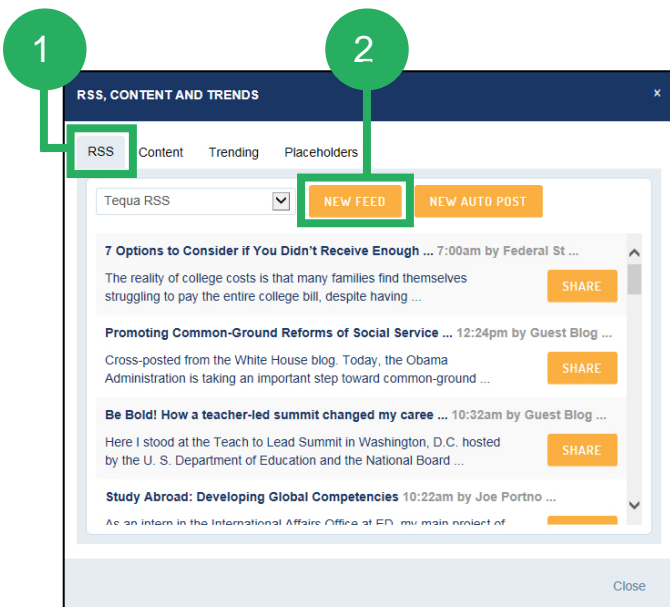
Create intelligent queues where you can add multiple posts to be delivered at set times. Setup your queues to recycle posts or just cycle through once. Select users who can act as contributors to be able to add posts to this queue.



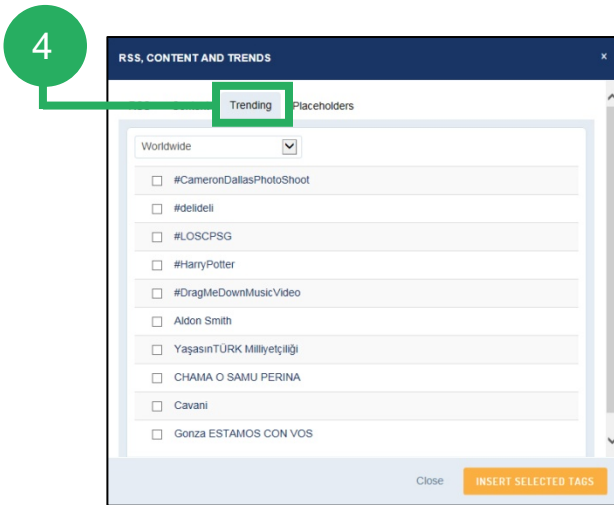
Additional Content – Add additional content to posts

Enrich your posts with additional content via (1) RSS feeds. Simply (2) add the Feed Name and Feed URL and Create Feed.

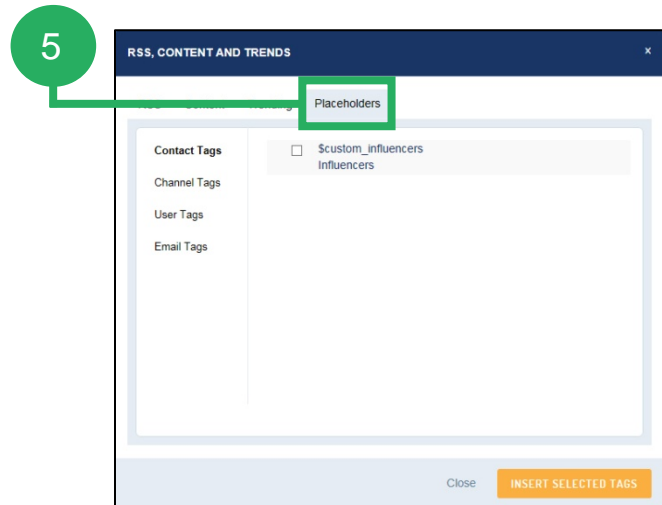
(3) Add content such as HTML content.



View what's currently **(4) Trending** and insert these hashtags into your post.



Insert **(5) placeholders** to personalize posts.

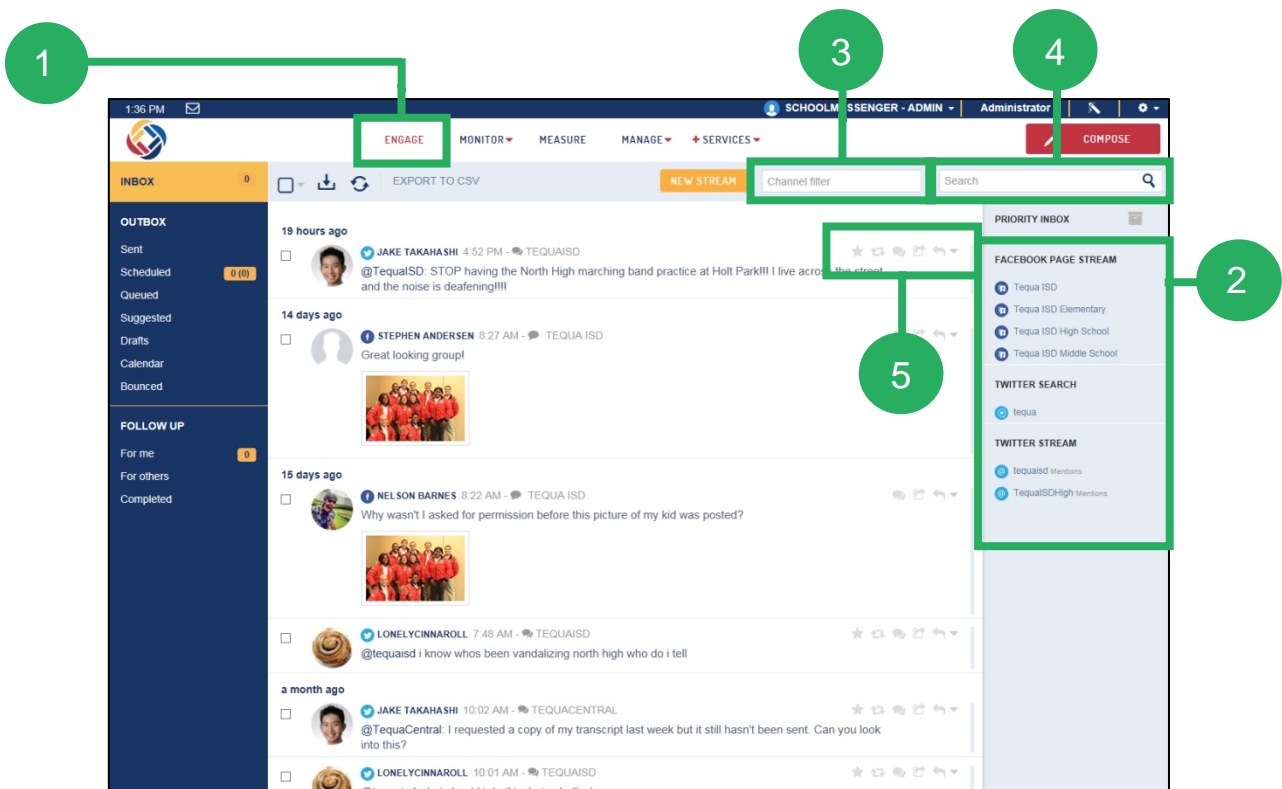


Engage – Interacting on your social platforms

The **(1) Engage** section is available at the top, left hand side of the Dashboard from every page in K-12 Social.

You will be taken to your Priority Inbox that collates all your social media activity into one convenient stream. Or **(2) choose which real-time stream** to view by selecting it from the right sidebar. **(3) Filter by channel** or use a **(4) manual search**.

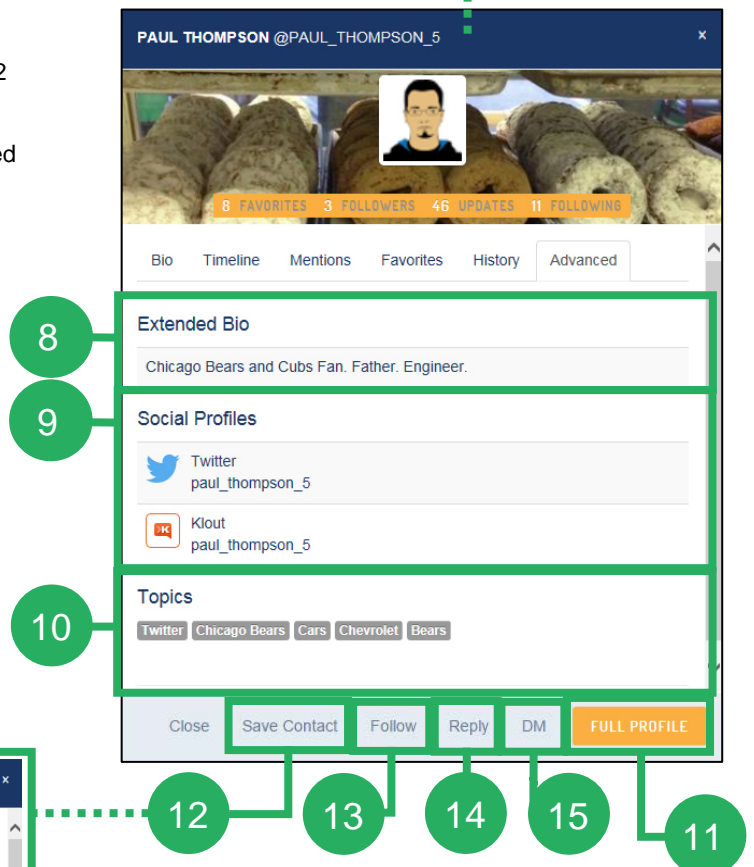
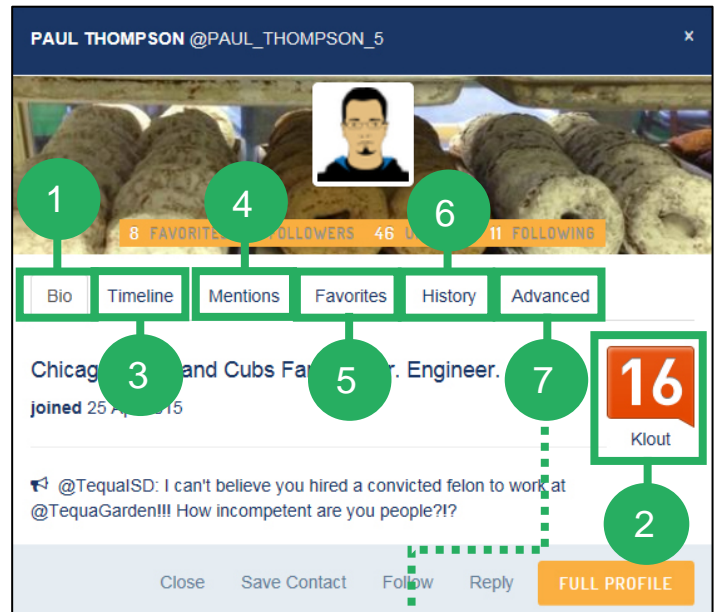
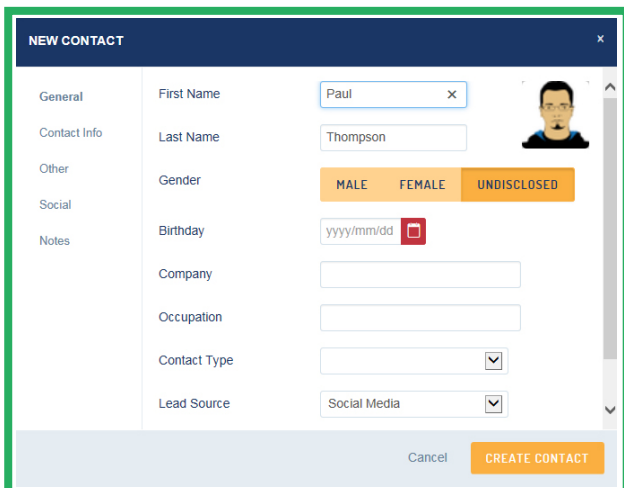
Interact with contacts directly from the Engage section, notice which social network the activity is on by the corresponding logo. **(5) Use the Retweet, Show Conversation, Repost, Reply, Translate, Archive, Assign and Reply** enabling you to engage on your social media profiles directly from the dashboard.



Profile Information

Click on the contact's name or username. This will give you an overview of information of the contact, starting with their

- (1) **Bio**
- (2) **Klout Score:** Measure of influence.
- (3) **Timeline:** Overview of the contact's activity timeline.
- (4) **Mentions:** Shows their recent mentions.
- (5) **Favorites:** The items they have favorited.
- (6) **History:** Your conversation history with that contact.
- (7) **Advanced:** Integration with Peer Index to show their (8) **Extended Bio, (9) Social Profiles, (10) Topics, Influences, Influenced By, Location, and more.**
- (11) **Full Profile:** See the full profile of the contact, you will be taken to their social profile.
- (12) **Save Contact:** Opens the options to add a persons General information, Contact Info, Social Information and Notes. Click "Create Contact" to save as a contact in K-12 Social.
- (13) **Follow:** Sets you to follow that person on the selected social network.
- (14) **Reply:** Reply to them on that social network.
- (15) **DM:** Direct message the contact.

This screenshot shows the 'NEW CONTACT' form. Callout 12 points to the 'Save Contact' button. Callout 13 points to the 'Follow' button. Callout 14 points to the 'Reply' button. Callout 15 points to the 'DM' button. Callout 11 points to the 'FULL PROFILE' button. The form fields include: First Name (Paul), Last Name (Thompson), Gender (MALE, FEMALE, UNDISCLOSED), Birthday (yyyy/mm/dd), Company, Occupation, Contact Type (dropdown), and Lead Source (Social Media).

Engage – Your Inbox, Outbox and Follow ups

On the left of the Engage section you will see the **(1) Inbox**. You will also see the **(2) Outbox**.

(3) Sent: Your posts which have previously been sent.

(4) Scheduled: A list of your scheduled posts.

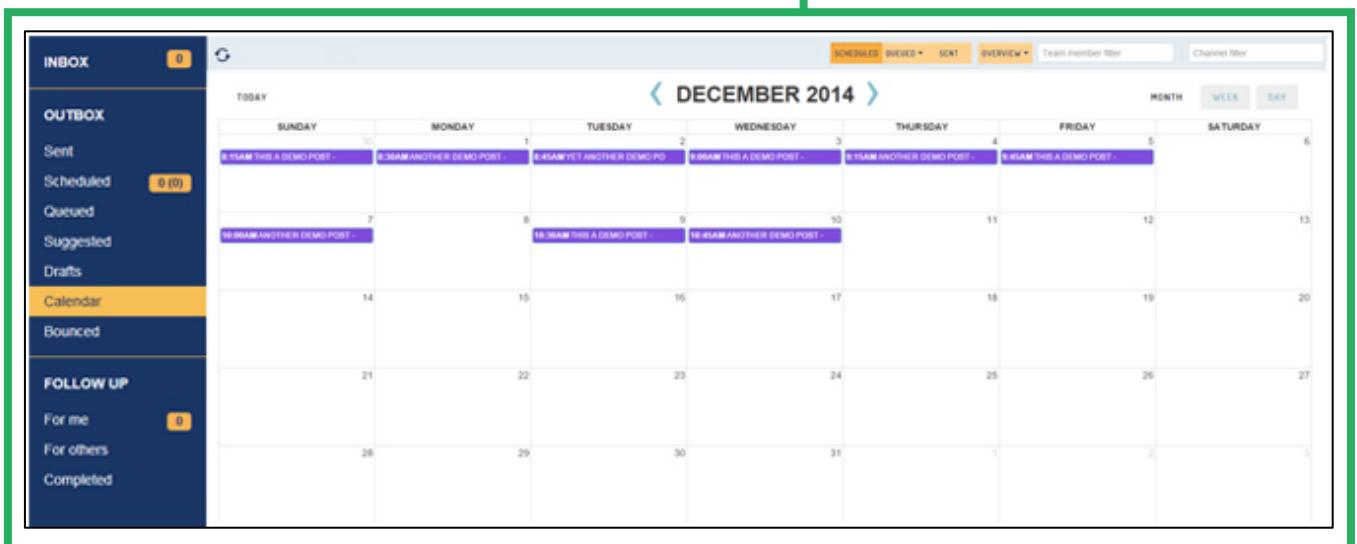
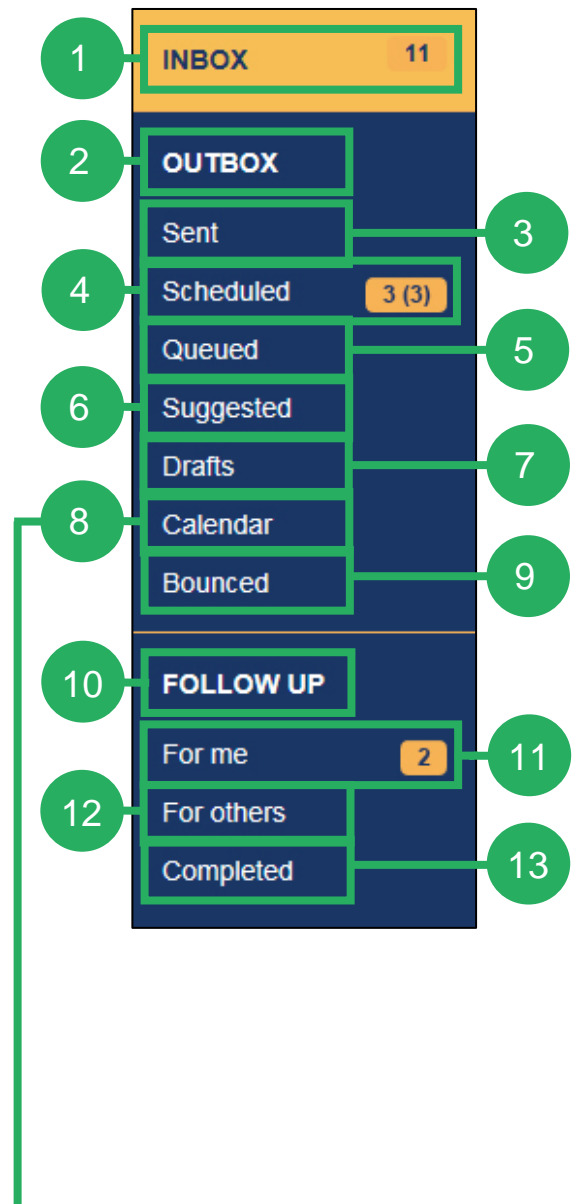
(5) Queued: A list of your queued posts.

(6) Drafts: Your draft posts.

(8) Calendar: An interactive calendar of your past and scheduled posts, these can be drag and dropped and rearranged to best fit your social media strategy. This can be filtered by Scheduled, Queued, Sent, Team Member or Social Channel.

(9) Bounced: This is a list of posts that have bounced, if the connection was lost between the platform and the social media site.

(10) Follow Up: This area relates to messages that have been sent for approval or tasks that have been assigned **(11) For me** or **(12) For others**, as well as tasks that have been **(13) completed**.




Monitor – Keyword and reputation monitoring

The **Monitor** section allows you to monitor the “Social Web” for mentions for example specific keywords, your brand, your clients, your competitors. Use the **(1) Type Filter** to filter results by specific social media sites, blogs, news websites, videos, comments and review sites. You can also filter results by positive, neutral or negative sentiment.

(2) Use the Retweet, Show Conversation, Repost, Reply, Translate, Archive, Assign and Reply enabling you to engage on your social media profiles directly from the dashboard. To create a new term or series of terms to monitor, click **(3) New Monitor** to create a monitor for either **Keywords** or **Review** sites.



Description	school bullying	4
This is for your own reference.		
Has all of these terms	bully OR bullying OR school	5
Words or phrases which we will monitor for you. Use OR between each word or phrase e.g. cola OR orange juice OR lemonade		
Has any of these words (optional)	bully, bullying, cyberbullying, school, reporting	6
Results <i>must</i> also which contain one or more of the above words or phrases Separate each word or phrase with a comma e.g. coffee, hot chocolate, tea		
Doesn't have these words (optional)	movie	7
Exclude entries containing the keywords above. (Separate multiple keywords with a comma)		
Google Alerts Feed (optional)		8
Enhance your results by adding Google alerts feed, remember to include the http:// or https://		
Only from this country	United States	9
Only show mentions from a specific country or location (only supported on Twitter) Select "Any" if you want to search every monitoring social network and web results Please note: Enabling this option will reduce the number of results. Test this using Twitter's advanced search to see the example of results you can expect.		
Location	United States	
		
Longitude	-95.71289100000001	
Latitude	37.09024	
Within this distance (miles)	200	
Send email notifications to	gohalmers@somecdomain.com	10
Separate multiple email addresses with commas.		
Email notifications	Daily (new posts)	11
Select whether or not to receive email notifications when new mentions are discovered.		
<input type="button" value="SAVE CHANGES"/>		
12		

Keyword Monitors

- (4) Description:** A name for each particular keyword setting.
- (5) Has all of these terms:** Help keep results relevant by making sure they have all of the necessary words. Use an all-caps “OR” between words or terms.
- (6) Has any of these words (optional):** Setting to include only results that contain one or more of keywords. Separate multiple terms with commas.
- (7) Doesn't have these words (optional):** Further help keep your results relevant by filtering out results that have words or phrases that you know are not relevant to your interest.
- (8) Google Alerts Feed (optional):** To enhance your results, create or add the URL to a Google Alerts Feed.
- (9) Only from this country:** Select a country, put a pin on the map and set a distance within which you want the results for these keywords to draw.
- (10) Send email notifications to:** Enter the email addresses to which you would like these keyword alerts sent.
- (11) Email notifications:** Choose how often to send an email about new keyword alerts.
- (12) Save Settings/Changes:** Always an important step, you want to save, right?

Review Site Monitors

Monitor your feedback on **(1) Review Sites**.

(2) Description: This is just a name for your own reference.

Add the URL to the Review website you would like to monitor, including:

(3) Yelp Page.

(4) Trip Advisor Page.

(5) Glassdoor Company Page.

(6) City Search Page.

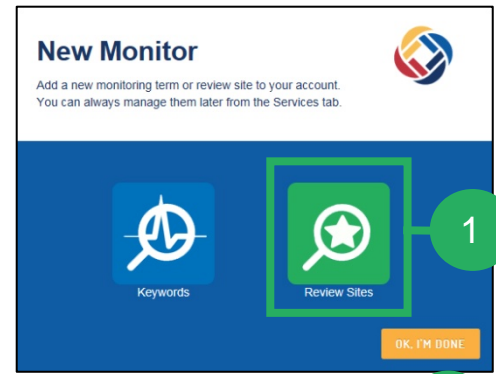
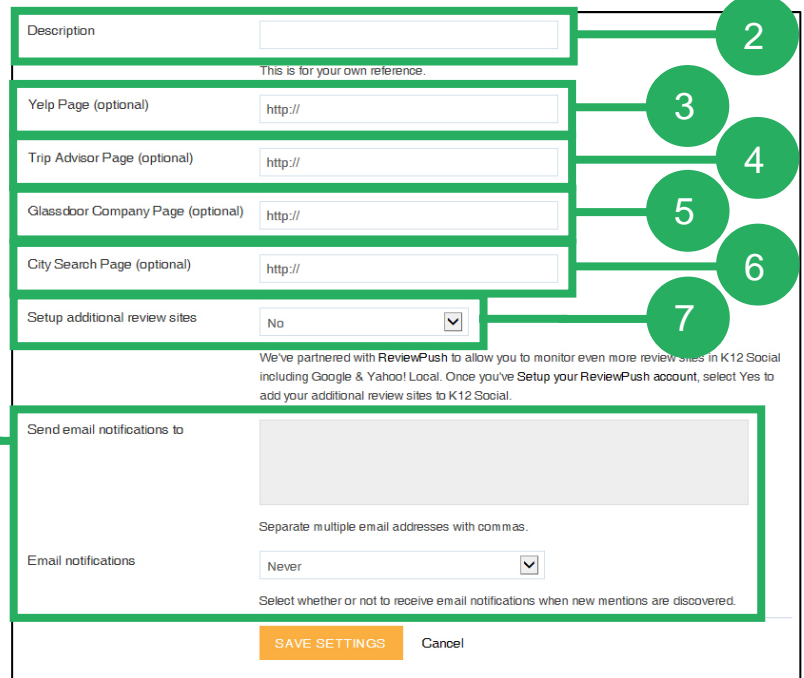
(7) Setup additional review sites:

Yes/No

We've partnered with ReviewPush to allow you to monitor even more review sites in K-12 Social including Google & Yahoo! Local. Once you've setup your ReviewPush account, select Yes to add your additional review sites to your Social Media Management Solution.

(8) Email notifications: You can enter multiple email addresses which will receive notifications when any of the configured review sites have activity.

(9) Save Settings: Unless you're just checking out the options for future reference, you'll want to save these settings before closing.

(10) Filter your monitored keywords.

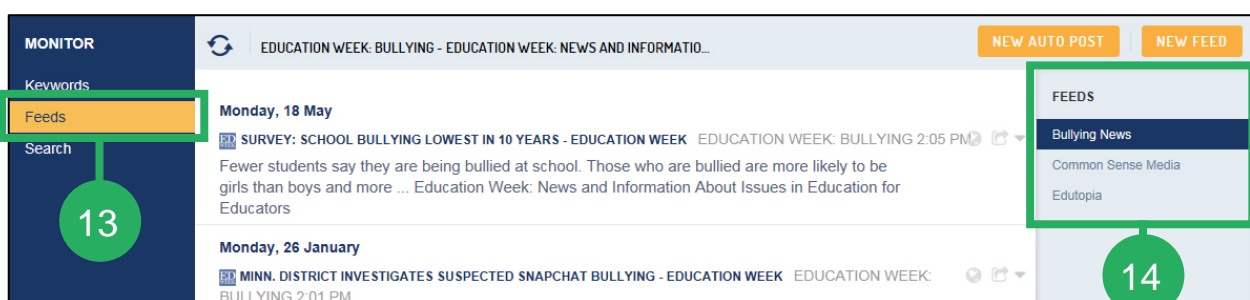
(11) Search for additional keywords.

(12) Choose from mentions you've previously set up.



(13) Feeds: This will display the RSS Feeds which you have previously set up.

(14) Choose RSS Feeds to view: Please see Page 8 for further details on how to set up RSS Feeds.



Search – Real time search on Facebook & Twitter

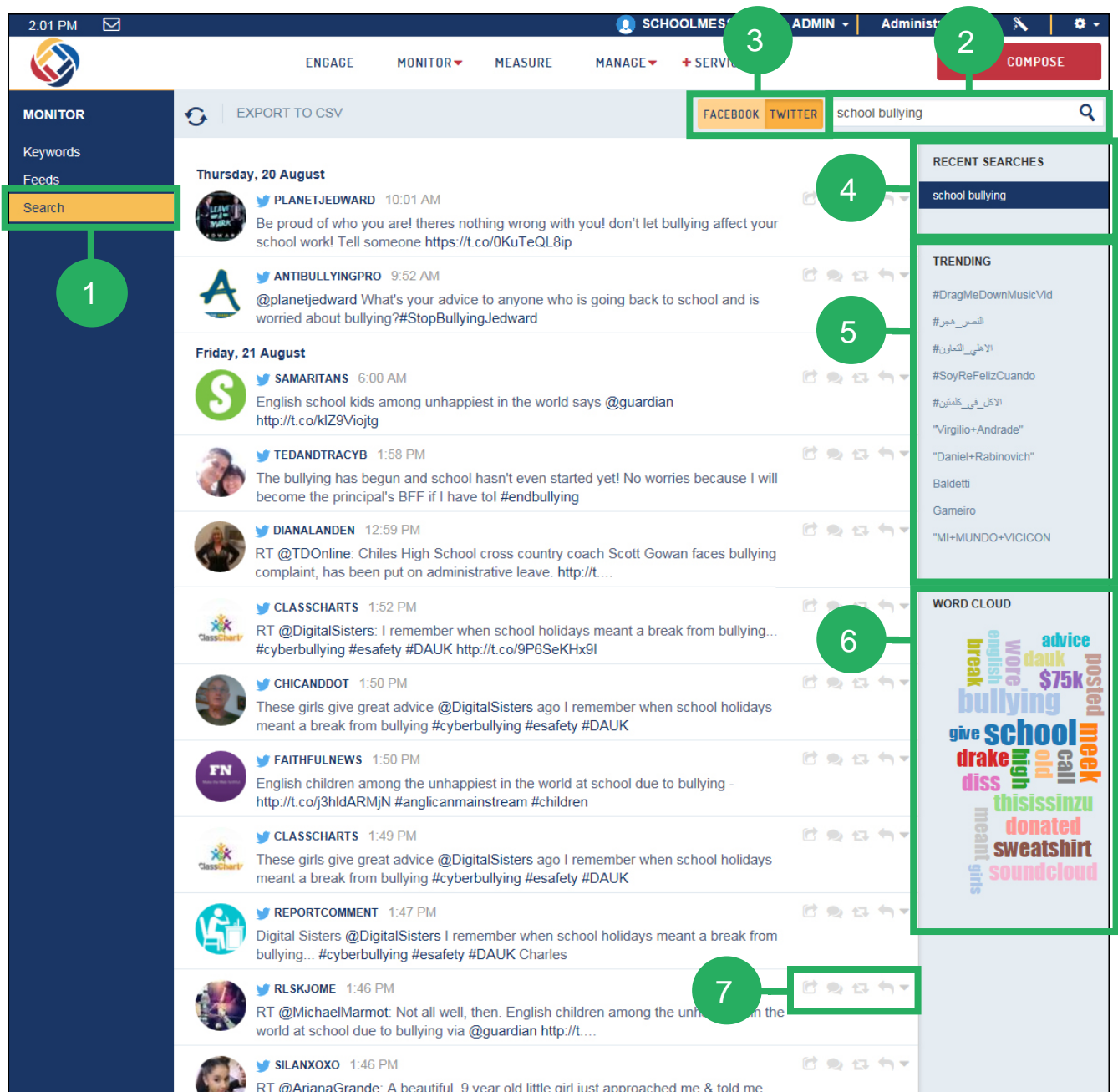
This section enables you to

- (1) **Search** in real-time for mentions of keywords by
- (2) **typing words or phrases** and selecting
- (3) **Facebook and Twitter**.

In the right sidebar you will see your

- (4) **Recent Searches**
- (5) **Trending hashtags** as well as a
- (6) **Word Cloud** of the most popular keywords associated to your search.

Use the (7) **Retweet, Show Conversation, Repost, Reply, Translate, Archive, Assign and Reply** enabling you to engage, using your social media profiles, directly from the dashboard.



The screenshot displays the School Messenger dashboard with a search for "school bullying".

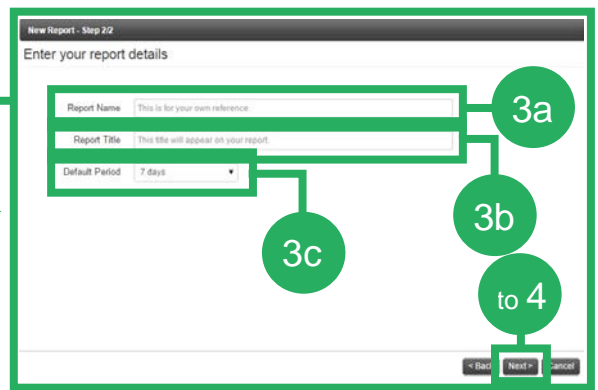
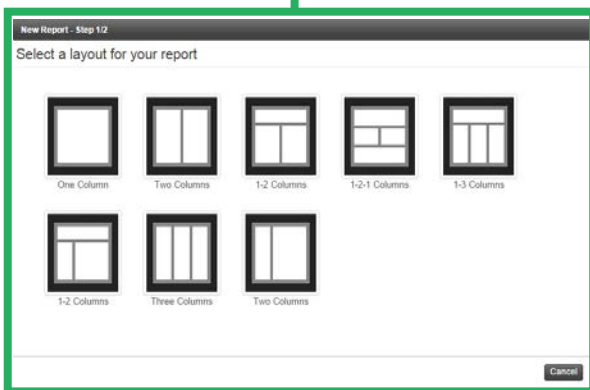
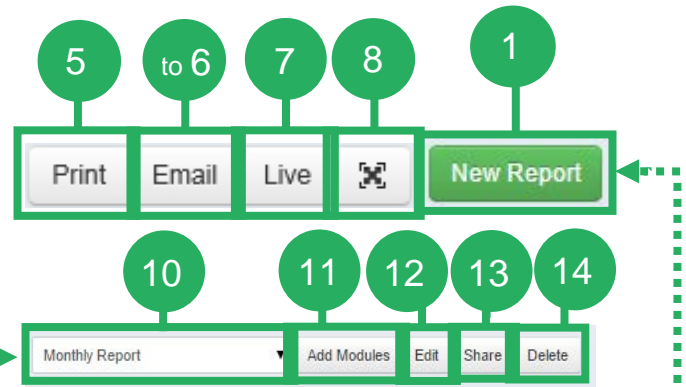
- 1:** Search button in the left sidebar.
- 2:** Search input field in the top navigation bar.
- 3:** Social media platform tabs (Facebook and Twitter).
- 4:** Recent Searches list in the right sidebar.
- 5:** Trending hashtags in the right sidebar.
- 6:** Word Cloud in the right sidebar.
- 7:** Action icons (retweet, reply, etc.) for a tweet in the main feed.

Measure

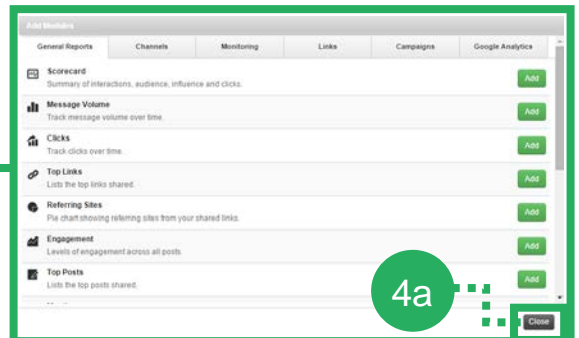
The **Measure** section allows you to create and view custom-made reports about your social media activities.

Report Builder

- (1) **New Report** button.
- (2) **Select Layout** from the multiple column style options.
- (3) **Enter your Report Details:** Give the report a (a) name, a (b) title and a (c) period of days to display/calculate (which can be edited later).



(4) **Add Modules:** Add all metrics you would like included. Use the tabs to add more choices from Channels, Monitoring, Links, Campaigns and Google Analytics. (4a) Click “Close” after adding metrics to view your new report.



(5) **Print Report:** Easy to print, paper-ready view.
 (6) **Email Report:** Clicking “Email” allows you to (6a) enter multiple email addresses, (6b) provide a subject line, (6c) message and (6d) schedule a recurring schedule for automatic delivery of an email copy of your report. (6e) Remember to “Save Settings” if you want are scheduling or wish to send the same report to the same recipients again.

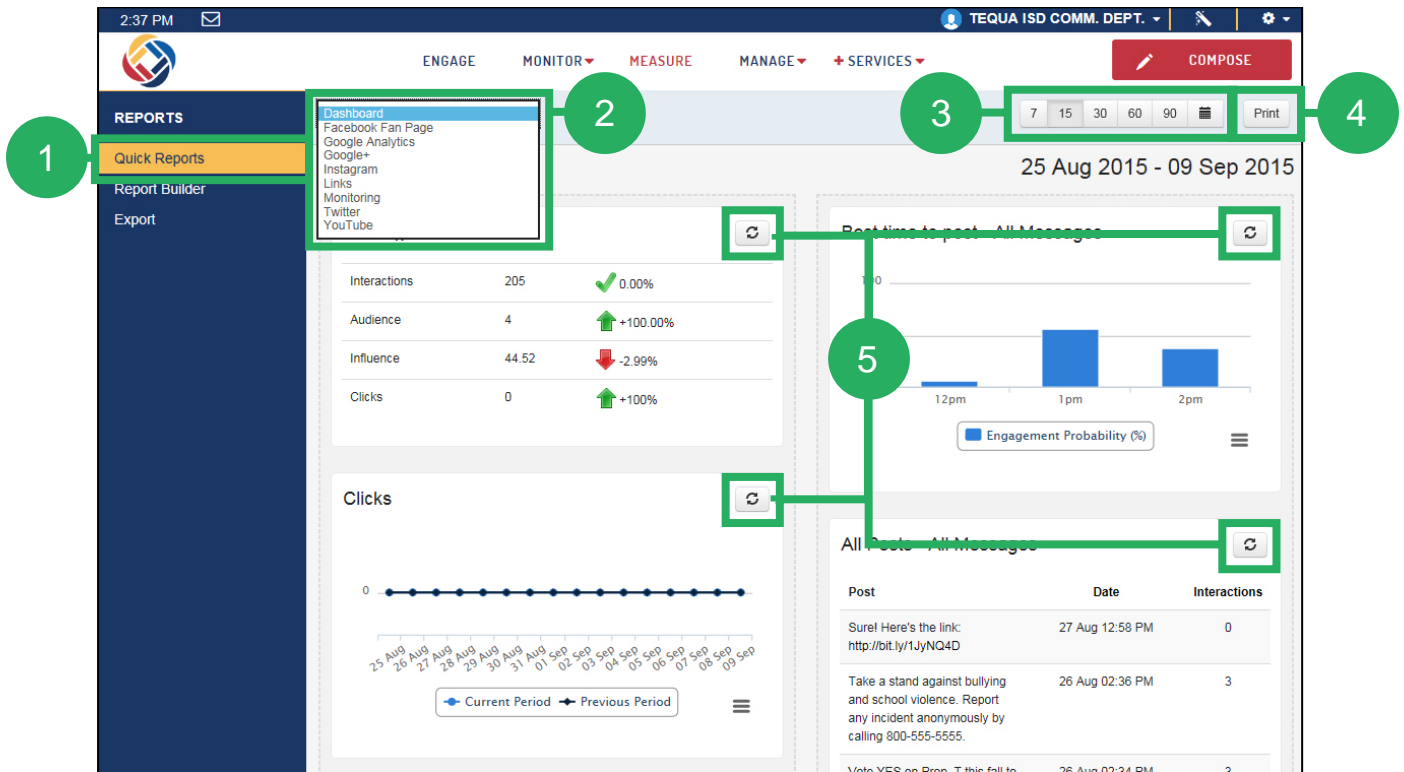


(7) **Live Report:** enabling you to share the report, via a URL.
 (8) **View Report in Full Screen Mode.**
 (9) **Date Range:** Select the time span this report covers.
 (10) **Select Report:** Choose from previously created reports.
 (11) **Add Modules:** Add additional reporting metrics to your existing reports.
 (12) **Edit Report:** Just about every facet can be edited.
 (13) **Share Report:** Let others on your account view the report.
 (14) **Delete Report.**
 (15) **Add Logo:** Personalize/brand a report with a logo image.
 (16) **Add Contact Details**

All reports made in Report Builder are automatically saved.

Quick Reports – Create a quick report

View a **(1) quick report** and access premade report templates. **(2) Choose from a range of the most popular reporting metrics**, view by **(3) date** or **(4) print**. You can drag and drop to arrange the reports to your requirements or **(5) Refresh** the metrics for new results if require

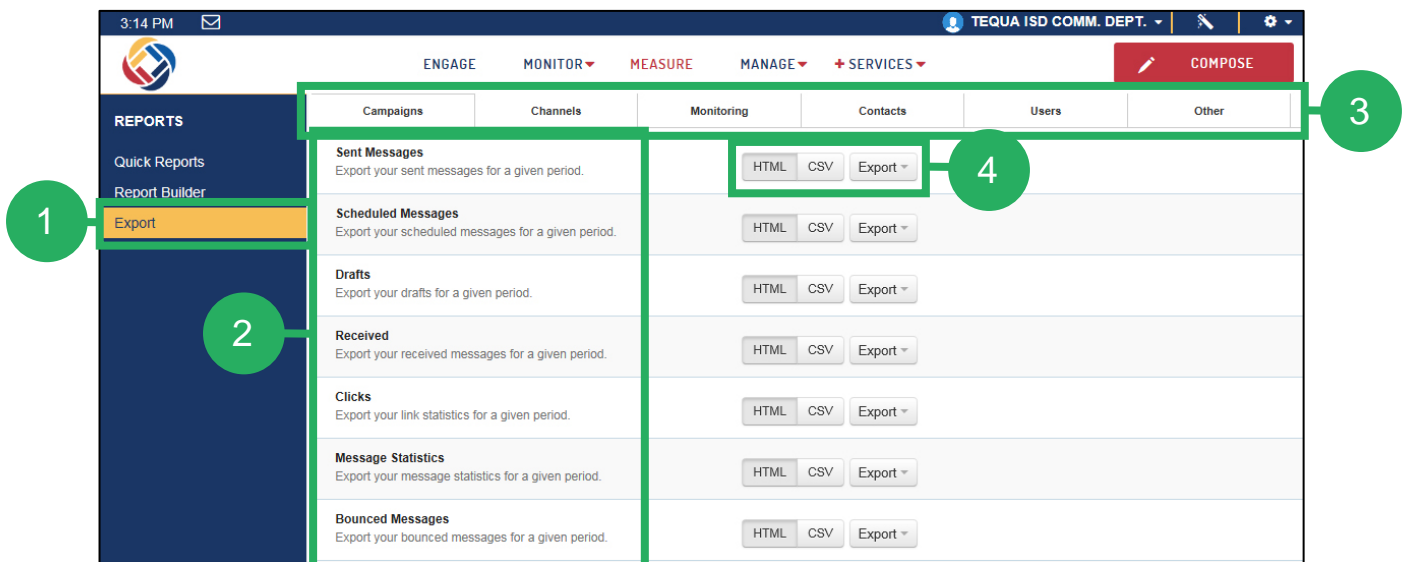


The screenshot shows the 'MEASURE' tab selected in the top navigation bar. The left sidebar has 'Quick Reports' highlighted. A dropdown menu is open, showing options like 'Dashboard', 'Facebook Fan Page', 'Google Analytics', etc. The main area displays a 'Post time to post - All Messages' chart and a 'Clicks' line chart. A table of posts is visible at the bottom right.

Post	Date	Interactions
Sure! Here's the link: http://bit.ly/1JyNQ4D	27 Aug 12:58 PM	0
Take a stand against bullying and school violence. Report any incident anonymously by calling 800-555-5555.	26 Aug 02:36 PM	3
Vote YES on Prop. T this fall to	26 Aug 02:34 PM	3

Export – Export reports for further analysis

(1) Export reports on a number of different **(2) metrics** including **(3) Campaigns, Channels, Monitoring, Contacts, Users and Other** in a number of different **(4) formats** such as HTML and CSV for further analysis and interrogation.

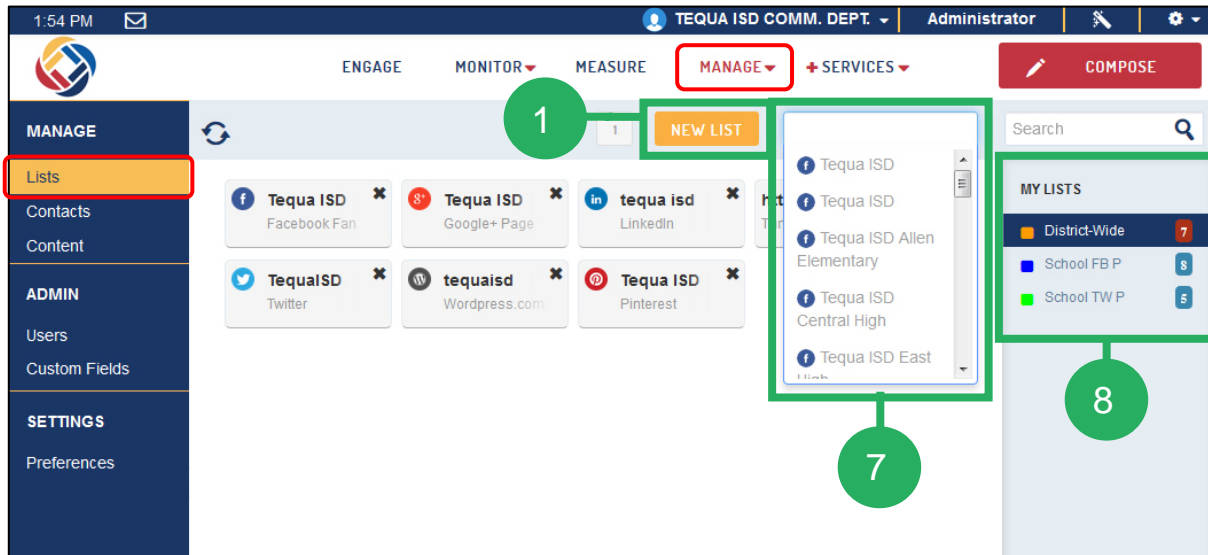


The screenshot shows the 'Export' option selected in the left sidebar. The main area displays a table with columns for 'Campaigns', 'Channels', 'Monitoring', 'Contacts', 'Users', and 'Other'. Each column has a list of metrics with 'HTML', 'CSV', and 'Export' buttons.

	Campaigns	Channels	Monitoring	Contacts	Users	Other
Sent Messages Export your sent messages for a given period.				HTML CSV Export		
Scheduled Messages Export your scheduled messages for a given period.				HTML CSV Export		
Drafts Export your drafts for a given period.				HTML CSV Export		
Received Export your received messages for a given period.				HTML CSV Export		
Clicks Export your link statistics for a given period.				HTML CSV Export		
Message Statistics Export your message statistics for a given period.				HTML CSV Export		
Bounced Messages Export your bounced messages for a given period.				HTML CSV Export		

Manage

The **Manage** section of K-12 Social gives you the power to set up mailing lists of social services as well as manage users and content. Create lists to group your social services together. This is ideal for saving time as well as segmenting particular social media sites you would like to post to.



New Services List – Group your Social Media Services

From the **Manage** section, select **Lists**.

Click on **(1) New List**, to get started creating a new list to group together a social profile.

(2) List Name

(3) List Color

(4) Consumers: Which team users can post to this group.

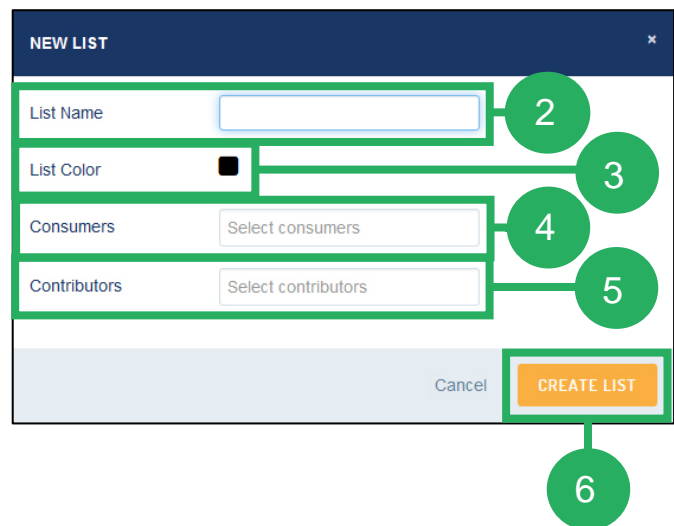
(5) Contributors: Which users can add additional services to this list.

(6) Create List: Saves the configuration to "My Lists" and moves to the next step.

(7) Services Box: Once a list is created, you may select any services you've set up from the drop-down menu to add them to this list.

(8) My Lists: Your created lists will be available to select, edit and manage from this section.

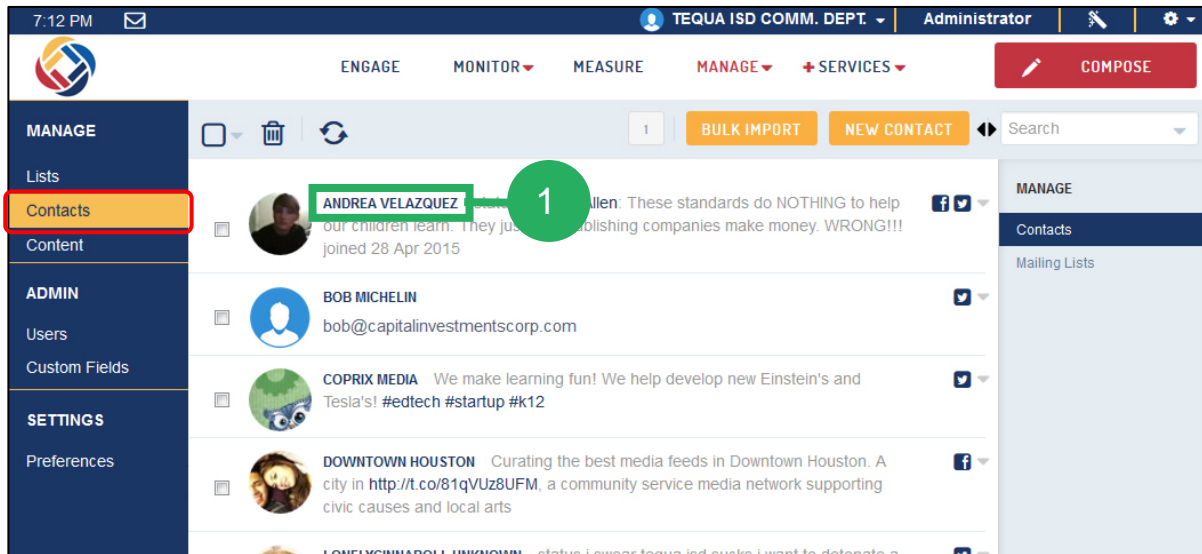
All lists will be available to post to from the Compose section (select a social network).



Contacts – Manage your Social CRM

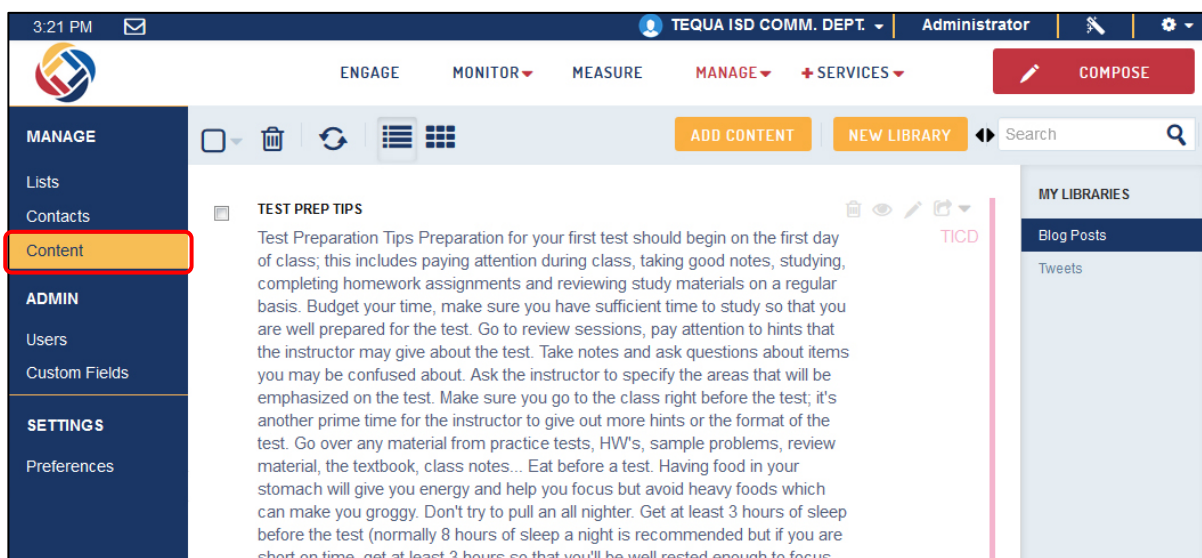
The **Contacts** area allows you to view all contacts which you have acquired via the Social CRM. You can also add individual or bulk import contacts and create mailing lists.

(1) Click on the **contact's name** to view or edit their data, or gain further information about the contact as previously shown on page 9.



Content – How to add new content

This allows you to (1) **Add Content** and view the content you have previously added (see page 7).

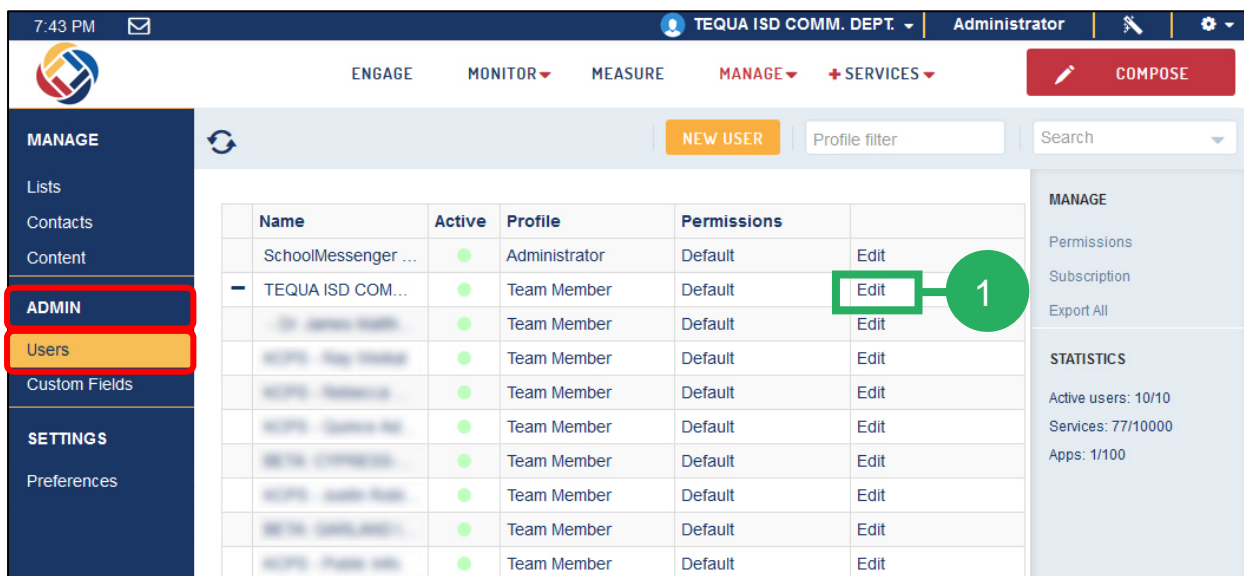


Admin – Controlling user and admin settings

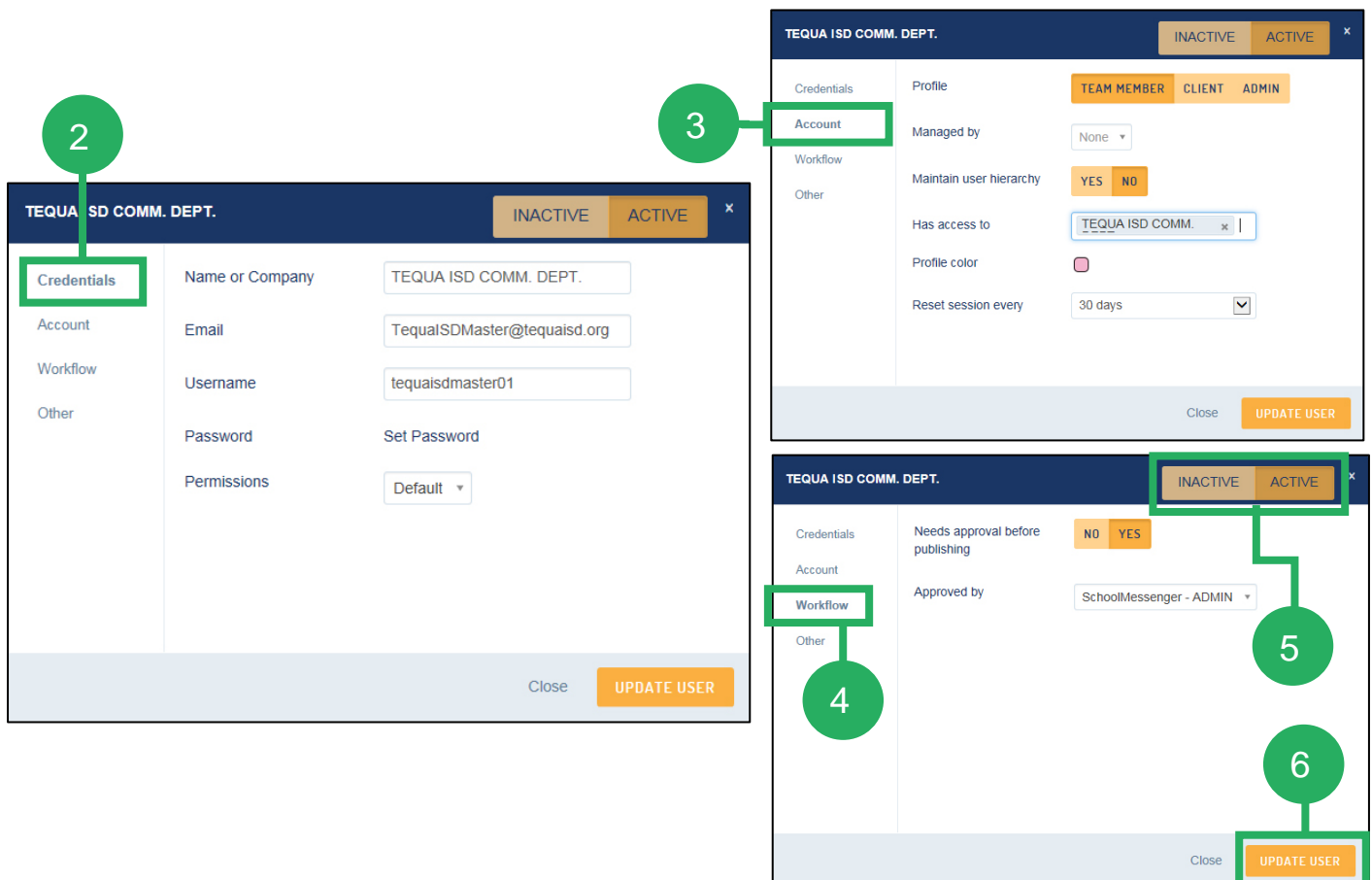
The **Admin** area allows you to manage **User** profiles. This is where you can see if users are active, as well as view and edit their permissions.

Click **(1) Edit** and you will see their **(2) Credentials**, **(3) Account** Details (If they are a Team Member, Client or Admin). Their **(4) Workflow** (If their posts need approval before publishing). Other information can also be associated with their profile.

You also have the option to make the user **(5) Active or Inactive**. Don't forget to **(6) Update User** when your edits are complete.



Name	Active	Profile	Permissions
SchoolMessenger ...	●	Administrator	Default Edit
TEQUA ISD COM...	●	Team Member	Default Edit
TEQUA ISD COM...	●	Team Member	Default Edit
TEQUA ISD COM...	●	Team Member	Default Edit
TEQUA ISD COM...	●	Team Member	Default Edit
TEQUA ISD COM...	●	Team Member	Default Edit
TEQUA ISD COM...	●	Team Member	Default Edit
TEQUA ISD COM...	●	Team Member	Default Edit
TEQUA ISD COM...	●	Team Member	Default Edit



TEQUA ISD COMM. DEPT. [INACTIVE] [ACTIVE]

2 Credentials

Name or Company: TEQUA ISD COMM. DEPT.

Email: TequalSDMaster@tequaisd.org

Username: tequaisdmaster01

Password: Set Password

Permissions: Default

Close [UPDATE USER]

TEQUA ISD COMM. DEPT. [INACTIVE] [ACTIVE]

3 Account

Profile: TEAM MEMBER CLIENT ADMIN

Managed by: None

Workflow: Maintain user hierarchy YES NO

Other: Has access to: TEQUA ISD COMM. Profile color: Reset session every: 30 days

Close [UPDATE USER]

TEQUA ISD COMM. DEPT. [INACTIVE] [ACTIVE]

4 Workflow

Needs approval before publishing: NO YES

Approved by: SchoolMessenger - ADMIN

5

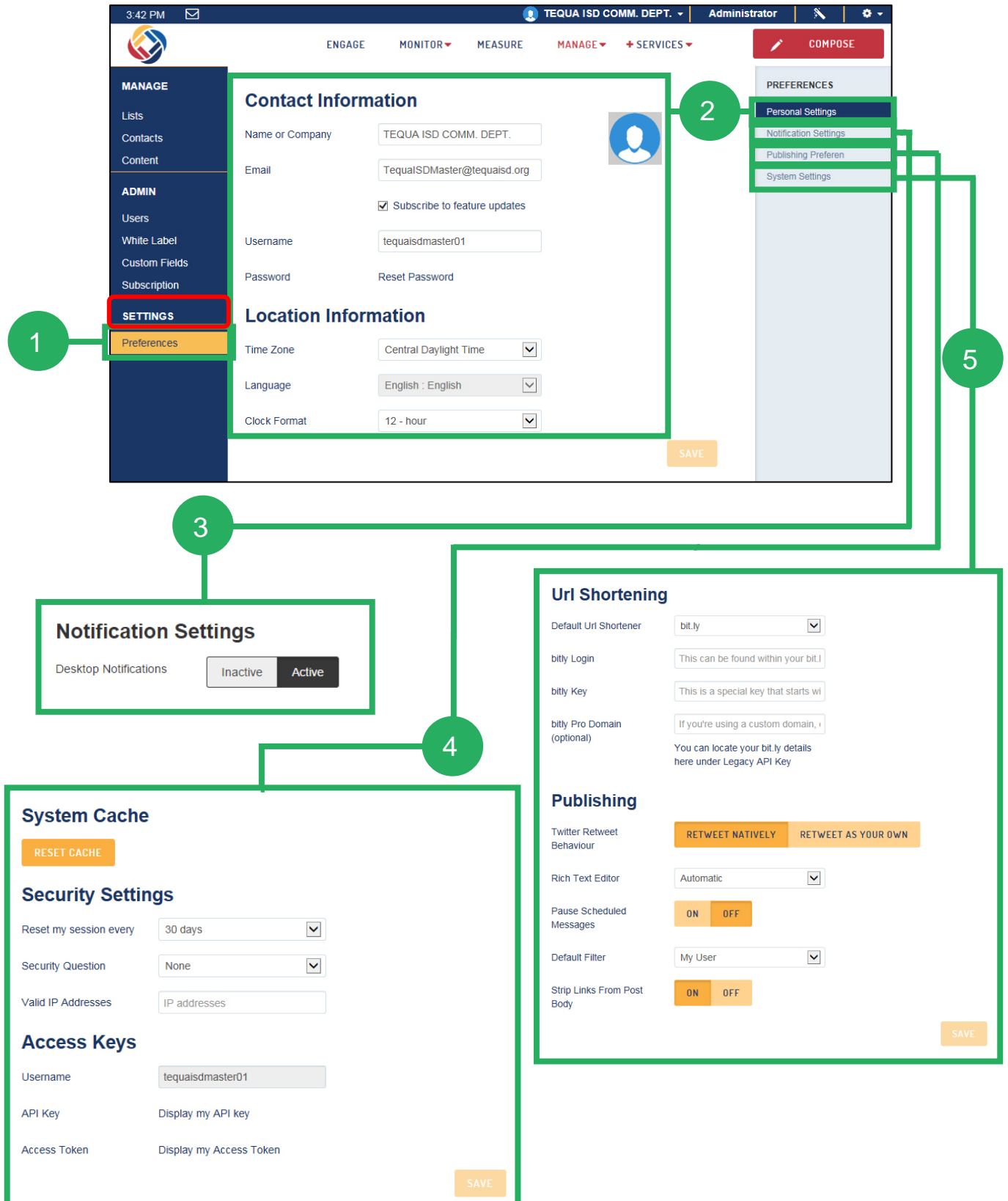
6

Close [UPDATE USER]

Settings – Control your Settings and Preferences

You can also view a high level overview of your account information, (1) **Settings** and Preferences.

Here you can view and edit your (2) **Contact and Location Information**. Your preferences can also be viewed and edited such as your (3) **Notifications**, (4) **Publishing Preferences** and (5) **System Settings**.



The screenshot shows the 'Settings' page for a user named 'Administrator' at 'TEQUA ISD COMM. DEPT.'. The interface includes a top navigation bar with 'ENGAGE', 'MONITOR', 'MEASURE', 'MANAGE', and '+ SERVICES'. A left sidebar contains 'MANAGE' (Lists, Contacts, Content) and 'ADMIN' (Users, White Label, Custom Fields, Subscription) sections. The 'SETTINGS' section is highlighted with a red box and labeled '1'. Below it, 'Preferences' is highlighted with a yellow box. The main content area is divided into 'Contact Information' and 'Location Information' sections, both highlighted with green boxes and labeled '2'. A 'COMPOSE' button is visible in the top right. A 'PREFERENCES' sidebar on the right contains 'Personal Settings', 'Notification Settings', 'Publishing Preferences', and 'System Settings', with 'Personal Settings' highlighted and labeled '5'. Below the main content, three callouts point to specific settings: '3' points to 'Notification Settings' (Desktop Notifications: Inactive/Active), '4' points to 'System Cache' (RESET CACHE button) and 'Security Settings' (Reset my session every: 30 days, Security Question: None, Valid IP Addresses: IP addresses, Access Keys: Username: tequaisdmaster01, API Key, Access Token), and '5' points to 'Publishing' (Twitter Retweet Behaviour: RETWEET NATIVELY/RETWEET AS YOUR OWN, Rich Text Editor: Automatic, Pause Scheduled Messages: ON/OFF, Default Filter: My User, Strip Links From Post Body: ON/OFF).