4 Company Settings

To access company settings, click the drop-down menu next to your name, and select ***My Company***.

?? 7??These settings require Company Admin or Group Admin permissions..?POST 7

Some Settings are enabled on a per-customer basis; depending on your contract, some of these features may not appear to you. Contact Support for more information.

Info

The Info panel shows the number of currently used initiatives, and the number of available initiatives for the company. ??COMPANY OWNER NAME DISPLAYED FOR EVERYONE?

Edit Company Name, Parent Company

If you have access to the Spredfast Admin Panel, you can edit the Company Name and Parent Company. For more information about Parent Companies, see "Parent Company," on page 6.

To change the Company Name and Parent Company:

1. From *your name*>***My Company***, click the ***Info*** tab.
2. In the **Owner** (? CHANGE FIELD NAME?) field, click the ***Edit*** (pen) icon.
3. In the **Edit Company** dialog, **Name** field, provide a new name.
4. In the ***Parent Company*** drop-down menu, select a new Parent Company from the list.
5. Click ***Save Changes.***

Twitter Admin Settings

Configure the maximum number of search-based streams and Twitter Users (@handle) streams permitted for each Twitter account, as well as the types of Retweet users can publish in Spredfast.

NOTE **Changing the Number of Allowed Streams**

Compliance with the values set in this screen is checked whenever new streams are added to an account. When you change the values set here, the system does not go through and immediately enforce the new value on all of your currently configured accounts. Any new accounts you add will be subject to the new limit.

For example, if you change the number of streams per account from six to three, and an account already has six streams associated with it at the time you make the change, the system does not immediately require you to remove or reallocate three of the current streams from the account. Instead, the system will continue to operate using all six streams, until you try to add a new one.

Twitter Stream/Account Association

Each Twitter search-based and Twitter Users (@handle) stream must be associated with an authenticated Twitter account for stream data to be obtained from Twitter. For each type of stream, set the maximum number of streams that can be associated with each authenticated Twitter account. Allowing fewer streams can help you avoid rate limits. Search-based streams cannot exceed 50 per account. @Twitter user streams cannot exceed 15 per account.

To set the number of accounts associated with each Twitter stream type:

1. From *your name*>***My Company***, click the ***Info*** tab.
2. In the **Maximum number of Search-based streams per Twitter account** field, use the drop-down menu to select a value, or type a number.
3. In the **Maximum number of @Twitter user streams per Twitter account** field, use the drop-down menu to select a value.
4. Click ***Save***.

Retweet Type

Spredfast supports two types of Twitter retweets: Editable Retweet and ‘native’ Retweet. Editable retweets (also called Manual Retweets) consist of the text of the original tweet, with the text RT@handle prepended to it. Users can edit the text of these tweets before publishing. Retweet is similar to clicking the “Retweet” button on the Twitter platform. The original text is published exactly; no edits can be made. Select which type(s) of retweet are available to users in your company. If both types are allowed, select the default type that appears when the Retweet button is clicked from the item in the Social Inbox. Users can switch types in the publishing window.

Note that engagement metrics are not available for ‘native’ Retweets published through Spredfast.

NOTE **No Engagement Metrics for Native Retweets**

Though "native" Retweets posted through Spredfast are counted as publishing activity in Spredfast, engagement metrics are not available for them. (From Twitter's perspective, a native Retweet is an additional instance of the original tweet, not a separate tweet that can have independent, measurable engagement. Any engagement on the Retweet would be credited to the original Tweet.)

So if you post a "native" Retweet using Spredfast, and other people engage with the retweet, that engagement is not counted. Consequently, Average Engagement ratios may be skewed. If you must have engagement metrics on all retweets published through Spredfast, limit users to Editable Retweets only.

Security PENDING, PASSWORDS changing Pre7

For information on configuring a company for Enhanced security features, see "Security Enabled (Enhanced Security)," on page 8.

Basic Security

User sessions time out after 4 hours of inactivity. Activity initiated by Spredfast (such as updating streams in the Inbox) does not count as user activity.

After five unsuccessful log in attempts, a CAPTCHA response is required. The CAPTCHA feature presents an image containing a text string the user must enter correctly before accessing the application.

SSL is supported if users log in using https.

Enhanced Security

If enabled, supplemental security features can be set for the company. If any company administrator makes changes on this screen, an email is automatically sent to inform the other company administrators.

Password Authentication Settings

Set the frequency at which users must change their passwords. Click the ***Password Expiration*** checkbox, enter a number in the field, and select Months or Days. When a user's password expires, the user must set a new one the next time log-in is attempted.

Enforce strong passwords. In addition to requirements set within industry standard algorithms for password strength, the following are enforced: minimum of eight alphanumeric characters, at least one special character, at least one number, at least one uppercase letter, at least one lowercase letter, cannot match previous four passwords, and cannot resemble an English word or a simple pattern (for example, 12345678 or 09876543).

Enable CAPTCHA. Click the checkbox, and set the number of unsuccessful login attempts at which a “CAPTCHA” confirmation is required. The CAPTCHA feature presents an image containing a text string the user must enter correctly before accessing the application.

Restrict Login by IP Click the checkbox, and add IP or IP Range (using CIDR notation) that will be allowed to access the application. This is a “white list”; include IPs or ranges that are permitted.

Enforce SSL. Click the checkbox to require secure socket layers for all authentication.

If no user activity is detected after a set amount of time, the user session is ended and the user must log in again. Minimum amount of time is 15 minutes; maximum is 8 hours. Default is 4 hours. Click the ***Edit Session time-out*** checkbox, and fill in the amount of time.

Expire Passwords immediately. If you need to require all users to reset their passwords immediately, (such as making changes to security settings), click the checkbox, then click ***Save***.

Single Sign-On (Premium Security)

For information on configuring a company for Single Sign-on using SAML, see "Single Sign-On/SAML (Premium Security)," on page 8.

When Single Sign-on is configured, companies can allow (or require) their employees to access Spredfast with their single sign-on credentials using the Security Assertion Markup Language (SAML) 2.0 standard. The feature relies on a valid certificate from an external identity provider (IDP); three months prior to certificate expiration, Spredfast sends an email notification to all company administrators.

NOTE **Single Sign-on and Company Owner**

The user designated as the company owner is always able to log in to Spredfast without the IDP credentials, even when Single Sign-on has been made mandatory for all other users, so that there is always one person who can log in to the system if there is a problem with the provider or certificate. All users with Company Admin privileges can configure the Security tab and Single Sign-on, however.

Once Single Sign-on has been set up, administrators can choose to make it optional or mandatory for their users to log in via the IDP. If Single Sign-on is enabled, but not required, users can log in to Spredfast using either the regular URL or the IDP. If Single Sign-on is required, users must log in through the IDP.

If Single Sign-on is mandatory, whenever new users are added to the system the invitation email contains the link to log in through the identity provider. Users should bookmark the login URL that contains the required token. If Single Sign-on is enabled, but not required, new users are sent the usual reset password link to access the system.

Similarly, when Single Sign-on is mandatory and (five) login attempts from the IDP fail, the user's IP address is "locked" and a CAPTCHA confirmation is required. When Single Sign-on is enabled, but not required, and a log-in attempt through the regular URL fails, the user has the number of retries specified in the **Password-Based Authentication** panel of the ***Security*** tab.

NOTE **iPhone Application**

Single Sign-on is not supported from the Spredfast Mobile application.

Email assertion requirements/format. Spredfast uses the value of the saml:NameID tag in the saml:Subject to identify the Spredfast user logging in. The following is an example of a sanitized, valid saml:Subject tag that logs into Spredfast as test-user@examplecompany.com:

```
<saml:Subject>

<saml:NameID Format="urn:oasis:names:tc:SAML:2.0:nameid-for-
   mat:transient">test-user@examplecompany.com</saml:NameID>

<saml:SubjectConfirmation
   Method="urn:oasis:names:tc:SAML:2.0:cm:bearer">

<saml:SubjectConfirmationData NotOnOrAfter="..." Recipi-
   ent="..." InResponseTo="..."/>

</saml:SubjectConfirmation>

</saml:Subject>
```

Spredfast requires the customer certificate to validate the signature of their identity provider on the assertion. The Spredfast certificate chain can be accessed by the customer at the transport level via SSL.

To configure single sign-on authentication:

1. From *your name*>***My Company***, click the ***Security*** tab.
2. In the Single Sign-On Authentication section click the ***Enable*** checkbox.
3. Provide:
   - **a.** Issuer URL:
   - **b.** Login URL:
   - **c.** Logout URL:
4. (**Spredfast Admin only.**) Select SAML version. Version 2 (default) maps to SAML library version 1.11.0. Version 1 (legacy support) maps to SAML library version 1.8.2.

5 Click ***Browse*** and upload certificate The system checks the validity of the certificate. If the certificate is good, it displays “verified.”

6 Click ***Save***. The system displays the URLs necessary to implement single sign-on for users.

Complete any necessary testing.

7 **(Optional)** Click ***Make Single Sign On mandatory*** to require all users to sign in using the IDP. ??VERIFY MENU NAME?

Users

Add and Manage Users

Add users, assign/reassign Roles, Workspaces, Initiatives, Voices, and Approval teams. Export a list of users. Change the Owner of the Company.

To add a new user to the system:

1 From *[your name]*>***My Company***, click the ***Users*** tab.

2 Click ***Add***.

3 Provide first name, last name, and email address. The address provided in the **Email Address** field will be used to create the username. (You can add a second email address to contact the person later.)

4 Select ***User Role*** from the drop-down menu.

For more information about roles and permissions, refer to the User Guide.

For more information, see "User Roles and Permissions PENDING ROLES WORK," on page 41.

5 In the ***Workspace*** menu, select a Workspace for the user.

For more information about Workspaces, refer to the User Guide.

For more information, see "Workspaces," on page 55.

6 In the ***Approval Teams*** menu, choose the specific message Approval Teams for the user, No Approval Teams or All Approval Teams.

For more information, see "Approvals," on page 58.

7 Typically, users are assigned only to individual Initiatives. In the ***Initiatives*** menu, select No Initiatives, All (current) Initiatives, or specific Initiatives for the user. If you want the user to be automatically added to all initiatives created in the future, click the ***Add user to new initiatives*** checkbox beneath the drop-down menu.

For more information about Initiatives, refer to the User Guide.

For more information, see "Initiatives," on page 77.

8 Typically, users are assigned only to specific voices. In the ***Voices*** menu, select No Voices, All (current) Voices, or individual Voices for the user. If you want the user to be automatically added to all voices created in the future, click the ***Add user to new voices*** checkbox.

For more information about Voices, refer to the User Guide.

For more information, see "Voices and Accounts," on page 79.

9 ??THIS IS NOW CONFUSING, CHANGING THE 2nd FIELD NAME from SEND TO" CHANGE FIELD NAME? In the **?Send Invitation** section, **Email Address** field, you can enter a second email address to send the welcome message to (the message will be sent to both addresses; the username will be created using the address in the ?FIRST **Email address** field). If you leave this second **Email Address** field blank, the email invitation is sent to the address in the first **Email Address** field.

10 In the **Message** field, you can write a an additional personal welcome message to the user. This text will be added within the text of the default message. (Optional).

The default message says:

[Inviter's name] created a profile for you in Spredfast, so that you can help manage your organization's social media presence.

[Personal welcome message, if provided.]

Please use the following link to set your password and complete your profile and activate your account. [link]

If you have any questions, email us at support@spredfast.com.

11 If you want to send the invite now, click ***Send invitation immediately***. If you want to wait to send the invitation, you can click ***Add User***, and the welcome message will be set to "pending" status so that you can send it later.

12 To send pending messages, return to ***My Company***>***Users***, and click ***Pending Invitations.*** Click the + icon to select users to invite.

13 Click ***Add User***.

You can reassign a user to different Roles, Workspaces, Initiatives, Voices, and Approval teams using the **Edit User** dialog. You won't need to re-send an invitation to the user.

To change a user's assignments:

1 From *[your name]*>***My Company***, click the ***Users*** tab.

2 Locate the user in the list, and click ***Edit User*** (pen icon).

3 From the ***User Role*** drop-down menu, select the new Role.

4 From the ***Workspace*** drop-down menu, select the new Workspace.

5 From the ***Approval Teams*** drop-down menu, select the new Approval Teams.

6 From the ***Initiatives*** drop-down menu, select the new Initiative(s).

7 From the ***Voices*** drop-down menu, select the new Voices.

8 Click ***Save Changes***.

To reset a user's password??NEW W 7?:

1 From *[your name]*>***My Company***, click the ***Users*** tab.

2 Locate the user in the list, and click ***Edit Use***r (pen icon).

3 Click ***Reset password***.

4 Provide and Confirm the new password. ??ENTER PASSWORD?

5 Click ***Reset***.

You can export a CSV of users that contains:

- First, Last name
- Email address
- Role

To export a list of users:

1 From *[your name]*>***My Company***, click the ***Users*** tab.

2 Click ***Export***.

3 Choose to open or save the file.

4 Click ***Ok***.

To remove a user:

1 From *[your name]*>***My Company***, click the ***Users*** tab.

2 Find the user in the list, and click ***Remove User*** (trash can icon).

3 In the **Remove User** dialog, click ***Remove*** to confirm.

For information on changing users' Workspace, see "Workspaces," on page 55.

If you are the user identified as the "Company Owner" in Spredfast, the ***Change Owner*** button on this page becomes active, allowing you to choose a new owner.

To change the Company Owner

1 From *[your name]*>***My Company***, click the ***Users*** tab.

2 In the table, find the user who will be the new owner. Click the checkbox to the left of the person's name.

3 Click ***Change Owner***.

4 ??Confirmation dialog?

User Roles and Permissions PENDING ROLES WORK

In order for a user to take an action in the system, he must 1) have permission ??SEPARATE FOR APP AND CONTENT CENTER, OR COMBINED?, 2) have access to the initiative (and voice, to publish) and 3) have a workspace that includes the function. If the user does not have all three, the user cannot perform the action (and might not even see the screens for it).

The following table outlines available functions for each role, by screen.

Table 4-1 User Roles and Permissions by Screen

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Home Page							
Add Group (Initiatives view)	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per user view
Edit Group (Initiatives view)	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per-user view
Remove group (Initiatives view)	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per-user view
Info Tab	Yes	Yes	Yes	Read Only	Read Only	Read Only	
Set maximum number of Twitter streams per account	Yes	Yes	No	No	No	No	Edit Company Information
Select Retweet types, set default	Yes	Yes	No	No	No	No	Edit Company Information
Security (Supplemental)	Yes	Yes	No	No	No	No	Edit Company Information
Add User	Yes	Yes	Yes	No	No	No	Add and Remove User

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Change user's role	Yes	Yes	Yes, of users whose roles are manager or below...	No	No	No	Add and Remove Users
Send Pending invitations	Yes	Yes	Yes	No	No	No	Add and Remove Users
Create/Edit/ Delete/Assign Workspace	Yes	Yes	No	No	No	No	
Create Approval Teams	Yes	Yes	No	No	No	No	Edit Company Information
Rearrange Approval Team Order	Yes	Yes	No	No	No	No	Edit Company Information
Content Labels (configure) Group/ delete/ replace/ append	Yes	Yes	No	No	No	No	Edit Company Information
Highlight teams (Add/ Edit/Delete)	Yes	Yes	No	No	No	No	Edit Company Information
Create macros	Yes	No	No	No	No	No	Manage Stream Item Macros
Third-Party Apps> Kenshoo	Yes	Yes	No	No	No	No	Edit Company Information
Third-Party Apps> Salesforce	Yes	Yes	No	No	No	No	Link Salesforce and Edit Company Information

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Content Promotion (Configure Facebook pages that can include promoted content and grant Spredfast users permission to promote.)	Yes	Yes	No	No	No	No	Edit Company Information
Account Info/ My Account Time Zone Email Preferences	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per user view
Company Menu	Yes	Yes					Edit Company Information
Upgrade	Yes (sales info collection)	Yes (sales info collection)	No	No	No	No	
Manage Initiatives			No	No	No	No	
Create New	Yes	Yes	No	No	No	No	Create New Initiatives
Edit Initiatives	Yes	Yes	Yes	No	No	No	Edit Initiatives
Settings (Initiative)	Yes	Yes	As below	No	No	No	
Users (Create/Edit)	Yes	Yes	Yes	No	No	No	Add and Remove Users
User (Assign to Initiative)	Yes	Yes	Yes	No	No	No	Edit Initiatives
Web Analytics	Yes	Yes	Yes	No	No	No	Edit Initiatives
Link Tagging	Yes	Yes	Yes	No	No	No	Edit Initiatives

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Bit.ly Key	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Crimson Hexagon	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Blog Footers	Yes	Yes	No	No	No	No	Manage Blog Footer
Influencers	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Approval Setup (assign company approval team to voices)	Yes	Yes	No	No	No	No	Add and Remove Users
Approval Setup; create writer approval team	Yes	Yes	Yes, (but not com-pany approval teams)	No	No	No	Add and Remove Users
Objectives	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Scorecard Settings	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Keywords	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Values	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Targeting Profiles	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Delete Initia-tives	No	No	No	No	No	No	Delete Initia-tives
Voices	Yes	Yes	Yes; as below	Shows voices I'm in	Shows voices I'm in	Shows voices I'm in	View Mes-sages, plus be assigned to the Initia-tive
Create New Voices	Yes	Yes	Yes	No	No	No	Create New Voices

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Edit Voices (Details)	Yes	Yes	Yes	No	No	No	Edit Voices
Add/Edit Accounts	Yes	Yes	Yes	No	No	No	Add and Edit Accounts
Restrict a Twitter Account	Yes	Yes	Yes	No	No	No	Edit Voices
Remove voice	Yes	Yes	Yes	No	No	No	Edit Voices
Authenticate Account	Yes	Yes	Yes	No	No	No	Add and Edit Accounts
Delete Voice	Yes	Yes	Yes	No	No	No	Edit Initia-tives
Lock Stream (Twitter Stream/ Account Association)	Yes	Yes	No	No	No	No	Edit Com-pany Infor-mation
Initiative DashboardI-nitiative Dashboard							
Manage Pan-els	Yes	Yes	Yes	No	No	No	Default
Filter Panels	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per-user view
Save as new filter	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per-user view
Export Dash-board	Yes	Yes	Yes	No	No	No	Export Ana-lytics
Inbox							
Edit Streams included in Primary Col-lection?	Yes	Yes	Yes	Yes	No	No	Manage Inbox Set-tings
Rename Stream							This ability is controlled by a user's workspace

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Create, share, and delete Shared Collections							This ability is controlled by a user's workspace
Schedule message/ Reply/Reply All/Private Message (Respond to an item from the Inbox)	Yes	Yes	Yes	Yes	No	No	Either Create and Edit Message Schedule plus be Assignee on message OR Create and Edit Others Actions
Apply Macro	Yes	Yes	Yes	Yes	Yes	Yes	
Add/Rename Tabs	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
"Alias" a stream	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Highlight items	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Add an existing content labels to a stream item.	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Create Content Label on a stream item (Adding new labels can be restricted to Company Admins in the configuration tab.)	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Add note	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Add to Influencers	Yes	Yes	Yes	Yes	Yes	No	Mark and Unmark Influencers
“Follow” a Twitter user	Yes	Yes	Yes	No	No	No	Follow and Unfollow Users
View details	Yes	Yes	Yes	Yes	Yes	Yes	View Messages
Mark as read (Primary Collection? only)	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Archive items (Primary Collection? only)	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Archive items (Highlight stream)	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Filter stream	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Save filter	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Export stream items (5000 most recent)	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Add, move, remove Shared Bookmark	Yes	Yes	Yes	Yes	Yes	Yes	View Streams and Inbox
Comment on item	Yes; queue for publishing	Yes; queue for publishing	Yes; queue for publishing	Yes; queue for publishing	Yes/ submit for review	No	Publish Responses to Engagement
Like/Favorite Posts, Comments, Tweets	Yes	Yes	Yes	Yes	No	No	Publish Messages, and must be a user on the account used

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Delete item (from platform)	Yes	Yes	Yes	Yes	No	No	Publish Messages, and must be a user on the account used
Hide/Make Visible (Unhide) item from Facebook	Yes	Yes	Yes	Yes	No	No	Publish Messages, and must be a user on the (Page Admin) account used
Publishing/ Calendar							
Schedule Message	Yes	Yes	Yes	Yes	No	No	Create and Edit Message Schedule
Create Microblog posts	Yes	Yes	Yes	Yes	Yes	No	Create and Edit Own Messages
Repost Message	Yes	Yes	Yes	Yes	Yes	No	Create and Edit Own Messages
Copy Message	Yes	Yes	Yes	Yes	Yes	No	Create and Edit Own Messages
Change channels on the fly	Yes	Yes	Yes	Yes	Yes	No	Create and Edit Own Messages

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Promote a Facebook message	Special permission required. Even Company Admins must be granted specific permission to Promote Facebook Messages						The ability to promote a Facebook message in the Newsfeed is controlled by a unique permission, assigned on a per-user basis on the ***My Company>Content Promotion*** tab.
Create a Microblog Series (Facebook, LinkedIn, Twitter	Yes	Yes	Yes	Yes	No	No	Create and Edit Message Schedule
Create Other Message Types	Yes	Yes	Yes	Yes	No	No	Create and Edit Message Schedule
Message Importer (CSV)	Yes	Yes	Yes	Yes	Yes	No	Create and Edit Own Messages
Quick/ Advanced Filter	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per-user view
Change date display	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per-user view
Star an item	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per-user view
Add a note	Yes	Yes	Yes	Yes	Yes	No	Create and Edit Own Messages
View detail	Yes	Yes	Yes	Yes	Yes	Yes	View Messages

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Edit action	Yes	Yes	Yes	Yes	No	No	Either Create and Edit Message Schedule plus be the Assignee OR Edit Others' Message Schedule
Add content	Yes	Yes	Yes	Yes	Yes	No	Either Create and Edit Own Messages plus be the Assignee OR Edit Others' Messages
Delete Action	Yes	Yes	Yes	Yes	No	No	Edit Event
Approve content	Yes	Yes	Yes	Yes	No	No	Publish Messages
Reassign item	Yes	Yes	Yes	Yes	No	No	Assign Messages
Publish	Yes	Yes	Yes	Yes	No	No	Publish Messages
Analytics							
Change views	Yes	Yes	Yes	Yes	Yes	Yes	View Analytics
Filter data	Yes	Yes	Yes	Yes	Yes	Yes	N/A; per-user view
Export data	Yes	Yes	Yes	No	No	No	Export Analytics
Reports	Yes	Yes	Yes	Yes	Yes	Yes	View Analytics
Tools>App Builder	Yes	Yes	Yes	Yes	Yes	Yes	N/A. If enabled by Support, all users have access
Tools>Content Library							

Table 4-1 User Roles and Permissions by Screen (Continued)

Permission	Company Admin	Group Admin	Manager	Editor	Writer	Viewer	Privilege[a]
Add folder	Yes	Yes	Yes	Yes	Yes	Yes	None
Edit Bucket folder	Yes	Yes	Yes	Yes	Yes	Yes	None
Delete Folder	Yes	Yes	Yes	Yes	Yes	Yes	None
New Text asset	Yes	Yes	Yes	Yes	Yes	Yes	None
Upload Asset	Yes	Yes	Yes	Yes	Yes	Yes	None
Edit folder	Yes	Yes	Yes	Yes	Yes	Yes	None

a. This column indicates which privilege in the My Company>Users>Roles page controls the user Permission.

Privileges

The following table maps the Privileges depicted in the My Company>Users>Roles page to the internal code (constant).

Table 4-2 Master Privilege Mapping

Roles Page Category	Privilege	Internal Code	Notes
Manage Company*			
*Note that the Headings used in this column DO NOT reflect cumulative privileges; they serve only as topical groupings in the UI	Edit Company Information	edit_company	
	Manage Payment Options	manage_payments	
	Manage Blog Footer	blog_footer	
	Link SalesForce	link_crm	

Table 4-2 Master Privilege Mapping (Continued)

Roles Page Category	Privilege	Internal Code	Notes
	Streams Administrator	admin_streams	This permission formerly controlled sharing of Collections and the ability to make streams visible to users. Sharing Collections was moved to Workspaces, and the concept of “visible” streams was removed at 5.4
	Add and Remove Users	manage_users	
		manage_application_views	Add/edit/delete/assign workspaces
Manage Groups			These Group permissions are for business structure features that are no longer actively promoted.
	Create New Groups	create_group	
	Edit Group Information	edit_group	
	Delete Group	delete_group	
Manage Initiatives			
	Create New Initiatives	create_campaign	automatically confers edit_campaign; delete campaign
	Edit Initiatives	edit_campaign	
	Delete Initiatives	delete_campaign	
	Edit Default Widget Tabs	default_widget_tabs	
Voices			
	Create New Voices	create_voice	automatically confers edit voice
	Edit Voices	edit_voice	
	Add and Edit Accounts	edit_accounts	
Activity			
	View Messages	view	
	Create and Edit Message Schedule	edit_event	
	Edit Others’ Message Schedules	edit_all_events	

Table 4-2 Master Privilege Mapping (Continued)

Roles Page Category	Privilege	Internal Code	Notes
	Assign Messages	assign_events	
	Create and Edit Own Messages	edit_content	
	Edit Others' Messages	edit_all_content	
	Publish Messages	approve_content	
Streams, Inbox and Engagement			
	View Streams and Inbox	view_streams	
	Create and Edit Streams	edit_streams	Note that the ability to add/edit/delete streams has been moved to workspaces. All users now have this permission by default.
	Manage Inbox Settings	manage_inbox	This ability has been moved to workspaces.
		manage_my_stream_view	Note that this ability has been moved to workspaces. All roles now have this permission by default.
	Publish Responses to Engagement	respond	
	Mark and Unmark Influencers	manage_influencers	
	Follow and Unfollow Users	follow_users	Use to create a custom role that allows Editors to Follow users on Twitter
Analytics			
	View Analytics	view_metrics	
	Export Analytics	export_metrics	

Content Center Roles/Permissions

?SO, POSSIBLY separate and apart from the regular APP permissions, TBD. This is based on DEV-32222, which created the back end internal code mechanics; the UI for configuration and user role definition is part of the Flexible Role/Creation work. THIS IS PLACEHOLDER INFO. Note that in addition to the role assigned, user actions can also be restricted by the folders in the content center; if a folder is part of an initiative to which the user does not have access, the user will be unable to take actions on the assets in the folder, even if his role would ordinarily allow him to. UGH...SEE ALSO, CONTENT CENTER AND FOLDER SHARING, RESTRICTED FOLDERS STORIES.

Table 4-3

UI	Company Content Manager	Content Manager	Content Creator	Content Collaborator	Content Subscriber	Code (break out when complete)
No Initiative Restrictions ??can do anything regardless of whether or not has access to the initiative controlling the folder containing asset? IS THIS THE SAME AS Content Center Admin??	Yes					??ADMIN SAME AS MANAGER? CC_ADMIN (implied, DELETE_FOLDER, CREATE_FOLDER, SHARE_FOLDER, CREATE_ASSET, MOVE_ASSET, DUPLICATE_ASSET, DELETE_ASSET, BULK_UPLOAD_ASSET, EDIT_ASSET_CONTENT, EDIT_ASSET_PROPERTIES, EDIT_ASSET_STATUS, ADD_NOTES_TO_ASSET, VIEW_EXPIRED_ASSETS, VIEW_DRAFT_ASSETS, VIEW_READY_ASSETS, USE_READY_ASSETS
Delete Folder	Yes	Yes				DELETE_FOLDER
Create Folder	Yes	Yes	Yes			CREATE_FOLDER
Share Folder	Yes	Yes	Yes			SHARE_FOLDER
Create Asset	Yes	Yes	Yes		Yes	CREATE_ASSET
Move Asset	Yes	Yes	Yes			MOVE_ASSET
Duplicate Asset	Yes	Yes				DUPLICATE_ASSET
Delete Asset	Yes	Yes				DELETE_ASSET

Table 4-3

UI	Company Content Manager	Content Manager	Content Creator	Content Collaborator	Content Subscriber	Code (break out when complete)
Bulk Upload Assets	Yes	Yes	Yes			BULK_UPLOAD_ASSET
Edit Asset Content	Yes	Yes	Yes	Yes		EDIT_ASSET_CONTENT (implied, EDIT ASSET PROPERTIES)
Edit Asset Properties	Yes	Yes	Yes	Yes		EDIT_ASSET_PROPERITES
Edit Asset Status	Yes	Yes	Yes	Yes		EDIT_ASSET_STATUS (implied, EDIT_ASSET_PROPERTIES)
Add notes to Asset	Yes	Yes	Yes	Yes	Yes	ADD_NOTES_TO_ASSET
View Expired Assets	Yes	Yes				VIEW_EXPIRED_ASSETS
View Draft Assets	Yes	Yes	Yes	Yes		VIEW_DRAFT_ASSETS
View Ready Assets	Yes	Yes	Yes	Yes	Yes	VIEW_READY_ASSETS
Use Ready Assets	Yes	Yes	Yes	Yes	Yes	USE_READY_ASSETS (WHAT"S A READY ASSET? W/IN TIME FRAME? NOT IN EDIT STATE?

Workspaces

Change the screens and features that appear to different users. A “workspace” includes a defined set of screens and features. You associate a user with a workspace, and then the user is limited to the screens and features the workspace includes.

There are two standard, non-editable??STILL AT 7? workspaces: Basic and Advanced. By default, users will get the “Advanced” workspace, which displays all screens and features. The Basic workspace contains a limited set of features and screens, described below. You can also create custom workspaces to contain different sets of features appropriate for your users.

In order for a user to take action in the system, he must 1) have permission, 2) have access to the initiative (and voice, to publish) and 3) have a workspace that includes the function. If the user does not have all three, the user cannot perform the action, and might not even see the screens for it.

Advanced Workspace

The Advanced workspace contains access to all screens and features. It is the default workspace for all newly created users.

Basic Workspace

The Basic workspace includes:

- Publishing icons in the masthead, providing the ability to publish microblogs for Facebook, LinkedIn, Google+, Twitter, and Weibo. (It does not include publishing for other types of messages).
- Inbox screen
- The ability to create new streams, export stream data, and manage streams. (You can turn these on/off independently in a custom workspace.)
- Calendar screen, which will display only the user's events.

Custom Workspaces

Create a custom workspace that contains only the screens and features appropriate to a particular group of users. For detailed information about each of the settings available for a custom workspace, refer to the User Guide.

First, here are the screen/feature options that you can choose from. Once you understand these, it's simple to set up a custom workspace.

Table 4-4 Custom Workspace Options

Item	Description
Publishing (in header?? NOT WITh 7!)	Publishing icons selected by the Admin appear/do not appear in the PUBLISH SCREEN?
	Promote Content: The ability to promote a Facebook message in the newsfeed is controlled by a unique permission, assigned on a per-user basis through the ***My Company***>***Content Promotion*** tab. See "Content Promotion," on page 74.
(Ability to use) Message Importer	The Message Importer icon appears/does not appear. See "Message Importer," on page 117.

Table 4-4 Custom Workspace Options (Continued)

Item	Description
Channels	Choose one or more types that the user can publish: Facebook, Twitter, LinkedIn, Google+, Weibo (microblog) icons, and Other message types (you can include all or none).
Calendar ?screen, not TAB anymore?	Calendar screen appears/does not appear. ??NOW ASSOCIATED W PUBLISHING?
Only display the user's calendar events	When checked, the Calendar only displays items for the user, and the filtering options are limited so that no other users' items can appear. When left unchecked, all items from the selected initiatives appear to the user.
(Ability to use) Message Export	When checked, the user can export calendar contents, which are provided in a CSV file. See "Export Calendar," on page 185.
Initiative Dashboard	Initiative Dashboard appears/does not appear in the ***Analytics*** menu.
Inbox ??NO MORE "SOCIAL" Inbox	Inbox screen appears/does not appear.
Ability to Add streams	In the Inbox, the user can/cannot create new streams, edit, delete, and rename streams. The user can/cannot share Collections, make them Private once they have been Shared, and delete them.
Ability to export streams	In the Inbox, the user can/cannot export streams and stream data. (The ***Export*** option appears in the Stream Library.)
Ability to manage streams	The user has access to the ***Twitter-based Streams*** tab in the Initiative Settings.
Analytics	Analytics drop-down menu appears/does not appear.
Content Library??Center? (Tools>Content Library) WILL THIS BE PRESENT POST 7?	Content Library screen appears/does not appear. Users still have access to materials in the library (such as when they're writing a message) even if this screen is hidden.??

To create a custom workspace:

1. [Your name]>***My Company***>***Workspaces***.
2. Click ***Add Workspace***.
3. In the **Name** field, provide a descriptive name for the workspace.
4. Select the screens and features to be available to users assigned to the custom workspace.
5. Click ***Create***. The new workspace appears on the **Workspaces** page. You can edit or delete custom workspaces. Note that if a custom workspace has been assigned to one or more users, you must reassign those users to a different workspace before you can delete the custom workspace.

To assign a workspace to an existing user:

1. Select [Your name]>***My Company***>***Users***.
2. Verify that the user has the appropriate role and access to the initiative and voice, so that when you assign the workspace, she can perform tasks in it. You can change the user's role when you assign the workspace, if you need to.
3. Find the User in the list, and click ***Edit User*** (pen) icon. In the **Edit User** panel, ***Workspace*** menu, select the appropriate workspace.
4. Click ***Save Changes***.

To assign a workspace to multiple users:

1. [Your name]>***My Company***>***Users***.
2. Click the checkbox to the left of each user whose workspace you want to change. (To select all, click the ***Select all users*** checkbox next to the **Name** column heading (not recommended).)
3. Click ***Change Workspace***.
4. In the **Change Workspace** dialog, select a new workspace from the drop-down menu, and click ***Save Changes***.

Approvals

Before adding Approval Teams, make sure you understand how approvals work in Spredfast. Read "About Approvals," on page 59.

To create and add users to an Approval team.

1. [Your name]>***My Company***>***Approvals***.
2. Click ***Add Team.***
3. In the **Approval Team Name** field, type a name for the team.
4. From the list of users, click on the + icon next to the name of each user who will be part of the team. You can use the ***Add All*** or ***Remove All*** buttons if appropriate.
5. Click ***Add Team***.

   The new team appears in the list. To edit, or remove a team, use the ***Edit*** (pen) icon or ***Delete*** (trash can icon).

The order in which the teams are listed on the Approvals screen is the same order that will be used for message approval, if multiple approvals are required.

To reorder approval teams (to change the order in which the teams will be sent a message requiring approval):

1. [Your name]>***My Company***>***Approvals***.
2. Click ***Change Order***. The Approval Team user lists are collapsed so that only the team names are shown.
3. Drag and drop the teams into the correct order.
4. Click ***Save Order***.

For more information on assigning Approval Teams to initiatives, see "Approval Setup," on page 93.

About Approvals

Approval paths can be imposed at both the Initiative and message level. Company-wide, you create approval teams in a designated order. You then assign them to a voice within an initiative. A supplemental Writer Approval path can be added for an initiative to ensure content drafted by users at the Writer level is reviewed before entering the standard approval path for the voice.

The following applies to all use of approval teams and paths:

- A company can use multiple approval teams.
- Approval team membership and review order is set in ***My Company***>***Approvals***. (The group at the top of the list reviews first; the group at the bottom of the list reviews last.)
- When creating a message, one can choose to require supplemental approval from teams *in addition to* those required by the voice; when creating a message, expand ***Additional Options??STILL AFTER 7?***, click ***Approvals*** and select from the configured teams.

NOTE Making Changes to Supplemental Approval Teams

- For individual microblog messages, you can make changes to the list of supplemental teams at any time.
- For microblog messages that are part of a Series, you can make changes to the list of supplemental approval teams, but you must make the change on each individual message in the series; making a change on one does not make the change on the rest of the messages in the series.
- For individual messages of other types (video, photo, presentation, event, discussion topic), you can make changes to the list of supplemental teams *up until content for the message has been saved*. Once you save content, you can no longer make changes to the list of supplemental teams, even if you change the schedule for the message.
- Similarly, for other message types (video, photo, presentation, event, discussion topic), that are on a repeating schedule (the **Repeat**/ **Repeat every** fields are set), you can make changes to the list of supplemental teams up *until the content for the original item is saved*. Once content for the first item is saved, changes cannot be made to the list of supplemental teams for any of the following “repeats” of the message.

- All content to be published must be approved by one member of each approval team assigned to the Voice that is publishing it. (Use ***Initiative Settings***>***Approval Setup*** to select which teams to use for which voices within the initiative.) When a message requires approval, the system sends an email to each member of the approval team. When one member of the team approves the content, the system sends an email to all members of the next approval team. If one member of a team approves a message (even outside of the established order), the message is considered approved by the entire team.
- If a member of the approval team rejects the message, it is returned to the assignee listed on the message for editing and must repeat the entire approval process again.
- If anyone edits the message content, publishing accounts (voices, credentials, retweet credentials), approvals list, or schedule, the message must repeat the entire approval process. (A user can edit the title, assignee, content labels, and notes without restarting the approval process for the message.)
- If a user is a member of multiple approval teams, her approval “counts” for all the teams she is on. For example, a company uses three approval teams (A, B, and C) and user Joan is a member of teams A and C. If she approves a message sent to team A, the message then requires approval only from team B to be published; it is considered approved by team C as well as team A.
- After the scheduled publishing time has passed, a message will be published immediately once it receives all required approvals.

Approval and publishing of a microblog message through multiple voices varies depending on whether the company uses a “centralized” or “hub and spoke” model (also called Message Delegation) of publishing.

(See "Message Delegation Enabled," on page 11).

If the company uses the “centralized” model of publishing:

If a microblog message is slated for publishing through multiple voices, each with multiple approval teams, the message must receive approval from **all** teams before it can be published by **any** of the individual voices.

For example: a message is to be posted on Facebook through Voice 1, and posted to a different Facebook account through Voice 2. A member of the approval team for Voice 1 approves the message, but a member of the approval team for Voice 2 rejects it. The message cannot be posted through Voice 1 until it has received approval from Voice 2.

Default Behavior—No Message Delegation

Message must receive approval from all approval teams in all selected voices before it can be published for any of the voices

Assignee writes message

↓

Voice 1 Approval Team A
Approves

↓

Voice 1 Approval Team B
Approves

↓

Voice 2 Approval Team A
Approves

↓

Voice 2 Approval Team B
Rejects

↓

Assignee edits message
Approval process starts over

↓

Voice 1 Approval Team A
Approves

↓

Voice 1 Approval Team B
Approves

↓

Voice 2 Approval Team A
Approves

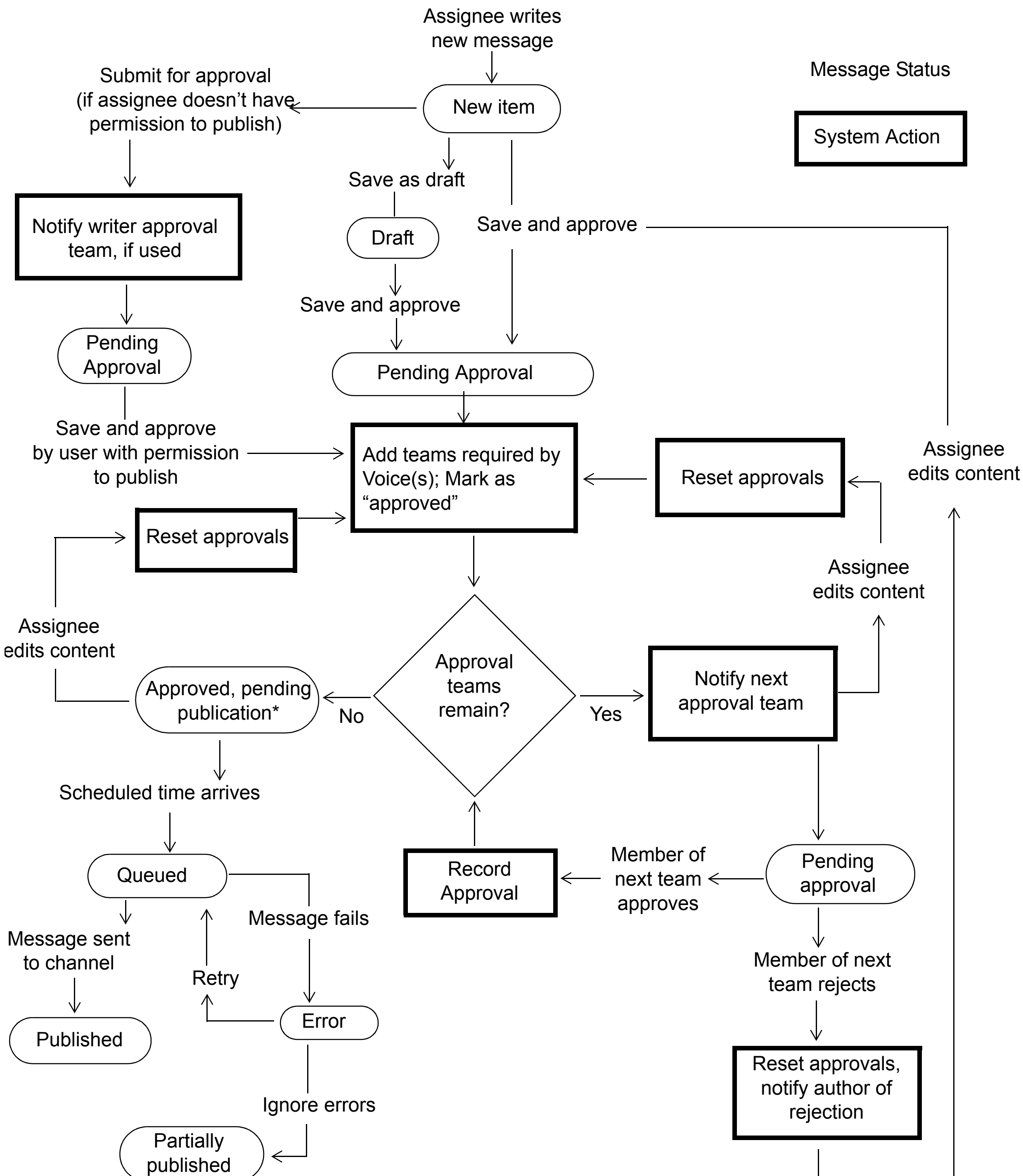
↓

Voice 2 Approval Team B
Approves

↓

Message is published for all 3 voices

Figure 4-1 Approval Process (Default)—No Message Delegation



* **For microblog messages only**:
Up until the scheduled publication time, a user can return a message to "Draft" status to prevent it from publishing.

Figure 4-2 Approval Process, with Publishing Statuses

If the company uses "hub and spoke" model of publishing (Message Delegation):

If a microblog message is slated for publishing through multiple voices, each with multiple approval teams, a separate instance (copy) of the message is created for each voice, so that the message can be published, edited or rejected by approval teams associated with the voice, regardless of what happens to other instances of the message within the other voices.

For example, a message is to be posted on Facebook through Voice 1 and posted to a different Facebook account through Voice 2. Upon creation, separate instances (copies) of the message are created; one for Voice 1 and one for Voice 2. The approval team for Voice 1 approves the message as written, and it published according to schedule. A member of the approval team for Voice 2 rejects the message. The assignee edits the message and resubmits it for approval. The edited message follows the approval path associated with Voice 2, and is posted on schedule.

TIP **Assigning Messages in Message Delegation**

When using Message Delegation, the user creating the messages will likely want to leave the source (original) message *unassigned* (that is, "assigned to me" by default) until all of the voices are selected and the multiple instances of the message are created. That way, each instance of a message can be assigned to the appropriate writer (or manager, who can then reassign it to the appropriate writer).

Message Delegation--A message can be approved and published separately through each voice.

- Enabled company-wide
- Applies only to microblog messages
- One instance (copy) of the message is created for each voice, and follows the voice's approval process

Assignee drafts message.
Two instances (copies)
of the message are created,
one for each voice

Copy 1	Copy 2
↓	↓
Voice 1 Approval Team A Approves	Voice 2 Approval Team A Approves
↓	↓
Voice 1 Approval Team B Approves	Voice 2 Approval Team B Rejects
↓	↓
Message is published through Voice 1	Assignee edits message; Approval process starts over
	↓
	Voice 2 Approval Team A Approves
	↓
	Voice 2 Approval Team B Approves
	↓
	Message is published through Voice 2

Figure 4-3 Message Delegation

For Reposts: When the hub and spoke model (message delegation) is used, and Repost is selected, separate instances of the original post are created for each voice, and follow the required approval path for each individual voice. Because Repost messages cannot be edited once they have been published, approval paths are not required for each subsequent time the message is posted.

For Series: When the hub and spoke model (message delegation) is used and a Series is created, placeholders for the messages are put on the Agenda as usual, but because voices/accounts have not been chosen yet, the system cannot copy the message into separate instances for each voice. Consequently, the "copying" of the message cannot occur until after the message in the series is edited, and voices/accounts are assigned. At that time, the message is copied into the appropriate number (one for each voice) and each one follows its required approval path.

Each instance of the message is tracked as a separate event in the system; it receives its own Message Details page and appears independently in the All Activity and Recent Engagement streams.

Labels

Create labels to tag content, track its performance, and associate it with an initiative or campaign.

NOTE **Case Sensitivity**

Content labels are not case sensitive. “Open” and “open” are interpreted to be the same label within Spredfast.

You can designate up to 25 labels as “Top Labels”; these appear at the top of the list when a user clicks in a **Label** field. ???STILL IN AFTER 7?

CAUTION **Label Deletion**

When label is deleted, all metrics data associated with the label are deleted.

To create content labels:

1. [Your name]>***My Company***>***Labels***.
2. Click ***Add Labels***.
3. In the **Label Name(s)** field, enter one or more labels, separated by commas.
4. Click ***Save***.
5. ???To designate a label as a Top Label, click the checkbox to the right of the label, in the **Top Label** column.

To “Append” a label means to add an additional label to content that has an existing label. For example, if you have the label “focus group” and append the label “market research” to it, all historical items currently labeled “focus group” would be labeled both “focus group” and “market research.”

NOTE **Append Label Works only on Historical Items**

Appended labels only work on items that have already been processed; it does not append the label to items going forward. Appended labels are displayed in the analytics along with the original label; they first appear the next time the data is refreshed.

To append a label to one or more other labels:

NOTE **Appending Labels**

You must create a label before you can append it to another label.

1. [Your name]>***My Company***>***Labels***.
2. If the label you want to append doesn't exist yet, add it.
3. For each label that should receive the new (appended) label, click the checkbox to the left of the label.
4. Click ***More Actions> Append***.
5. In the **Add these label(s) to the same content** field, begin to type the label; it will auto-complete in the field.
6. Click ***Append***.

You can create "Groups" of labels that are mutually exclusive, such that only one label from the group can be applied to an item at any given time (such as open/in process/closed; at any time, an item cannot be more than one of these).

To group a set of content labels:

1. [Your name]>***My Company***>***Labels***.
2. Choose the labels to include in the group; click the checkbox to the left of each label.
3. Click ***More Actions>Group***
4. In the **Group name** field, enter a name.
5. Click ***Save***.

You can replace content labels with new ones. All content that had the original label is updated with the replacement label.

To replace a content label:

1. [Your name]>***My Company***>***Labels***.
2. Choose the label to replace; click the checkbox to the left of the label.
3. Click ***More Actions>Replace***
4. In the **Replace these label(s) on the same content** field, enter the replacement label.
5. Click ***Replace***.

By default, users assign labels to content as part of the publishing or monitoring process (from within the publishing screens, **Calendar** and the **Inbox**). Users can also create new labels from those screens. To prohibit non-administrators from creating new labels, click the ***Restrict content label creation to Company Administrators on this page*** checkbox.

NOTE **Crimson Hexagon Category Labels**

When a user applies a Crimson Hexagon category to a stream item from the Inbox, the category is added as a content label in Spredfast, with the text "CH:" prepended to it. The label is added to Spredfast even if the ***Restrict content label creation to Company Administrators on this page*** is checked, and the user is a non-admin, because within the system, the categories already exist because of the Crimson Hexagon integration, and the label is only being "surfaced" by the user, not created. See "Crimson Hexagon," on page 92.

On the Labels tab, the **Messages** column shows the number of times the label has been applied to an outgoing message, company-wide ("Outbound"). The **Stream Items** column displays the number of times the label has been applied to an item in the Inbox ("Inbound"), company-wide.

Highlight Teams

Create teams to manage response to social items appearing in streams. From within a stream, highlight an item and assign it to a team. Highlighted items appear in each member's Highlighted stream ?AND IN DETAILS DRAWER OF ITEM? , and team members are sent emails about the item.

To create a highlight team:

1. [Your name]>***My Company***>***Highlight Teams***.
2. Click ***Add Team***.
3. In the **Highlight Team Name** field, provide a team name.
4. Find specific individuals by typing the first few letters of the first or last name in the **Search Users** field on top of the list of users.
5. Click the + icon next to a user's name to add him to the team. To add all users, click the ***Add All*** button at the top of the list.
6. Click ***Add Team***.

To edit a highlight team:

1. Click ***My Company***>***Highlight Teams***.
2. Show the current team list by clicking the ***Expand*** icon to the left of the team name.
3. Click the ***Edit*** (pen) icon.
4. In the **Highlight Team Name** field, you can change the team name.
5. Find specific individuals by typing the first few letters of the first or last name in the **Search Users** field on top of the list of users.
6. Click the + icon next to a user's name to add him to the team. To add all users, click the ***Add All*** button at the top of the list.

7 Click ***Save changes***.

Macros

A macro is a defined, repeatable series of actions that are applied to one or more items in a stream. Macros are defined by a company administrator, and appear to users working in the **Inbox**. Macros:

- can be assigned to one initiative, multiple initiatives, or all initiatives.
- can be applied to single items in a stream, or to groups of selected items using the multiple items processing menu.
- are limited to 100 total for each company within Spredfast.
- can include content specified by the administrator who created them (Administrator input), or content provided the user applying the macro (User input).
- are limited to a single channel when the macro includes a channel-specific action. For example, if “retweet” is part of a macro, you cannot apply that macro to a Facebook item.
- can be created putting the items in any order. When the macro is applied, all actions must be processed successfully, or the entire macro fails.
- contain actions that belong to one of three categories: No input, Administrator input, and User input, as follows:
    - No input—archive (from Inbox or Highlight stream), accept item, hide on Facebook.
    - Administrator input—add note, add label, highlight for individual or team. The administrator creating the macro defines the note content, label text, and persons/teams for whom the item is highlighted. When a user processes the macro, she can choose to add supplemental notes, content labels, and highlighted users.
    - User input—comment (Facebook, Google+, YouTube, LinkedIn, Instagram, Weibo), direct message, reply, retweet, repost, delete (which requires user confirmation), amplify. The administrator builds the macro to include the type of response, but the user applying the macro must supply the content when the item is processed.

???To see the macros that are available for a specific initiative, go to the Initiative filter in the upper right-hand corner of the screen, and select the initiative from the drop-down menu. NOT SURE THIS IS WORKING?

Some macro actions are prohibited (greyed out) when a user tries to run them from certain standard stream types; The matrix below sets out macro actions that are allowed (Yes) and not allowed (No) for each standard stream.

Table 4-5 Macro/Stream Compatibility

Action	Highlighted	Archived: Inbox	Archived/ Highlighted	Accepted	Hidden	Deleted
Highlight item	Yes	Yes	Yes	Yes	Yes	Yes
Add content label	Yes	Yes	Yes	Yes	Yes	Yes
Add note	Yes	Yes	Yes	Yes	Yes	Yes
Archive: Inbox	Yes	No	No	Yes	Yes	Yes
Archive: High-lighted	Yes	No	No	Yes	Yes	Yes
Accept item	Yes	No	Yes	No	Yes	Yes
Facebook: Comment	Yes	Yes	Yes	Yes	No	No
Google+: Comment	Yes	Yes	Yes	Yes	No	No
YouTube: Comment	Yes	Yes	Yes	Yes	No	No
LinkedIn: Comment	Yes	Yes	Yes	Yes	No	No
Instagram: Comment	Yes	Yes	Yes	Yes	No	No
Weibo: Comment	Yes	Yes	Yes	Yes	No	No
Twitter: Direct Message	Yes	Yes	Yes	Yes	No	No
Twitter: Reply	Yes	Yes	Yes	Yes	No	No
Twitter: Retweet	Yes	Yes	Yes	Yes	No	No
Weibo Repost	Yes	Yes	Yes	Yes	No	No
Facebook: Hide on Facebook	Yes	Yes	Yes	Yes	No	No
Amplify on Twitter	Yes	Yes	Yes	Yes	No	No
Amplify on Face-book	Yes	Yes	Yes	Yes	No	No
Amplify on Linke-dIn	Yes	Yes	Yes	Yes	No	No

Table 4-5 Macro/Stream Compatibility

Action	Highlighted	Archived: Inbox	Archived/ Highlighted	Accepted	Hidden	Deleted
Amplify on Google+	Yes	Yes	Yes	Yes	No	No
Delete	Yes	Yes	Yes	Yes	Yes	No

To create a macro:

1. [Your name]>***My Company***>***Macros***.
2. Click ***Create Macro***.
3. In the **Name** field, provide a descriptive name for the macro, so that it can be easily identified.
4. In the **Initiative** field, choose whether the macro should be available for all initiatives, or individual ones. If specific initiatives, select them using the checkboxes. ??DELETE NO INITIATIVES OPTION? MAKES NO SENSE.
5. From the **Available Actions** column, select an action to include in the macro by dragging/dropping it to the **Selected Actions** column, or highlighting an item, then clicking it.
6. If the macro item is an Administrator input item, provide the details in the panes below, such as note text, content label text, or users/teams to receive the highlighted item.
7. In the **Tooltip summary** field, enter text that appears when a user hovers over the macro. Users cannot see macro content when applying macros. When writing the description, you should include **all the actions contained in the macro, as well as the content/text of any labels or notes**. For example, a macro description might be "Add Content Label "Research" and Archive Item (Inbox)".
8. Click ***Create***.

Third-Party Apps

Kenshoo

When enabled, Spredfast automatically wraps all links published from designated initiatives in Kenshoo tags. To use Kenshoo tagging for an initiative, you must provide a Kenshoo Server Number (ks#) and associate a Kenshoo Profile number (profile#) with the Spredfast initiative. Contact your Kenshoo representative to obtain the Server Number and Profile numbers for your organization.

Kenshoo integration must be enabled on the Admin panel. See "Kenshoo Enabled," on page 12.

The Kenshoo link format is:

http://[ks#].xg4ken.com/media/redir.php?prof=[profile#]&affcode=uc|partner|{Campign_Name}|{Adgroup_Name}|{Keword}|{Match_Type}&url=http%3A%2F%2Fwww.website.com

where:

Table 4-6 Kenshoo Link Parameter Definitions

Parameter	Definition
ks#	Kenshoo Server Number
profile#	Kenshoo Profile Number
affcode=us|channel	Channel—one of the following: Spredfast_Facebook Spredfast_Twitter Spredfast_LinkedIn Spredfast_Flickr Spredfast_Slideshare Spredfast_Foursquare Spredfast_YouTube Spredfast_GooglePlus Spredfast_WordPress
Campaign_name	Name of the Spredfast Initiative
Adgroup_Name	(Internal) Spredfast message name
Keyword	(Internal) Spredfast Post ID
Match_Type	“broad”—always set to this value

NOTE **Link Shortening and Kenshoo Integration**

When Kenshoo link tagging is used for an initiative, all links published through that initiative must be shortened; users will not have the option to deselect ***Shorten on Publish*** when adding links to messages.

To use Kenshoo link tagging:

1. [Your name]>***My Company***>***Third-Party Apps***>***Kenshoo***..
2. In the **Kenshoo Server Number** field, enter your company’s Kenshoo server number and click ***Save***.

3. To use Kenshoo link tagging for a specific initiative, you must associate the initiative with a Kenshoo profile number. Click **Add profile.**
4. In the **Add Kenshoo Profile** dialog, enter a Profile Number, and use the checkboxes to select Spredfast initiatives to associate with the Profile. All links published from the selected initiative(s) will be wrapped in Kenshoo tags. If a selected Initiative already has a Profile Number, it will be updated with the new number when you save.
5. Click ***Add Profile***. The Profile/Initiative association appears on the **Kenshoo** page. To edit the profile number, click the ***Edit*** (pen) icon. To delete the association, click the ***Delete*** icon (trash can).

SalesForce

When enabled, users can link a person's profile from a **Inbox** stream item to a Social Contact Record in SalesForce (either an existing or unassociated Contact). Once the link has been established, profile information from Spredfast is imported into SalesForce, and, similarly, some of the information stored in SalesForce is displayed in Spredfast.

The following information is imported from Spredfast into SalesForce:

- User Name
- Bio
- Follower/Following Counts
- Engagement Count
- Influencer Status
- Conversation history

The following information is imported from SalesForce into Spredfast:

- Name
- Company
- Title
- Email address

Contact Support for more information.

To configure Salesforce integration:

1. [Your name]>***My Company***>***Third-Party Apps***>***Salesforce***..
2. In the **User Name** field, enter your user name..
3. In the **Password** field, enter your password.
4. In the **Security Token** field, enter your token.
5. Click ***Save***.

Content Promotion

?? Changing at 7? Select Facebook Pages for paid content promotion, associate Facebook Pages with Facebook Ad Accounts, and identify Spredfast users who are allowed to promote content on Facebook Pages from Spredfast.

Facebook Pages must already be authenticated in Spredfast, and must be set to Published status in Facebook to be eligible for content promotion. To enable Facebook pages, a user must be an administrator on the Facebook Page and have access to at least one Ad Account in Facebook. Each Facebook Page must be associated with a single Facebook ad account within Spredfast, but an ad account can be used for multiple Pages.

Promoters are Spredfast users who are allowed to publish promoted content; once added, they can promote to any eligible Facebook Page that they can publish to.

To configure Facebook Content Promotion:

1. [Your name]>***My Company***>***Content Promotion***.
2. In the drop-down menu, choose ***Facebook Pages***. if Facebook Content Promotion has not yet been configured for any pages, click ***Get Started***. Otherwise, click ***Add page*** to configure additional pages.
3. Log in using a Facebook account that is both a Page Administrator on the Facebook Pages, and has access to a Facebook Ad Account.
4. When asked for Permissions, click ***Allow***.
5. Based on the login credentials, Spredfast displays a list of accounts that 1) have Ad Accounts already associated with them in Facebook, and 2) have already been authenticated in Spredfast. If a page does not meet both conditions, it is not available in the list. In the **Enable Facebook Pages for Promotion (1)** dialog, click the checkbox to choose pages that will support Content Promotion from Spredfast. Click ***Next***.
6. In the **Enable Facebook Pages for Promotion (2)** dialog, click the checkbox to choose Ad Accounts to import into Spredfast. Click ***Next***.
7. In the **Enable Facebook Pages for Promotion (3)** dialog, use the selectors to associate an Ad Account with each Facebook Page. Each Page can have only one account. Accounts can be used for multiple Pages. Click ***Save***. The Pages and their associated Ad Accounts appear on the Content Promotion tab.

To enable Spredfast users to Promote Content on Facebook using Spredfast:

1. [Your name]>***My Company***> ***Content Promotion***.
2. In the drop-down menu, choose ***Promoters***.
3. Click ***Add Promoters*** if none have been added yet, or ***Manage Promoters*** to add to an existing list.

4. In the list, search for Spredfast users. Click on the + icon next to a name (or drag/drop it) to add it to the right-hand panel. Click ***Save Changes***. Users appear in list.

To reassign Ad Accounts and Facebook Users to Facebook Pages:

If multiple Facebook accounts have been authenticated in Spredfast for content promotion, you can change which Ad Account and User accounts are associated with a Page.

1. [Your name]>***My Company***> ***Content Promotion***.
2. Select ***Facebook Pages***
3. Find the page you want to reassign, and click ***Edit*** (keys icon).
4. In the **Facebook Page Ad Account Settings** dialog, use the Ad Account selector to change the account, and the User account selector to change the Facebook user associated with the Page.??NOT VISIBLE IN QA15 6/17
5. Click ***Save Changes***.

To disable Content Promotion for a Facebook Page:

Disabling a Page removes it from the Content Promotion list, so that no Facebook ads can be promoted on it from Spredfast. Note that if there are promotions that are active or pending on the Facebook page, it cannot be disabled.

1. [Your name]>***My Company***> ***Content Promotion***.
2. Select ***Facebook Pages***
3. Find the page you want to disable, and click ***Delete*** (trash can icon).
4. In the **Disable Content Promotion** dialog, click ***Disable***.