

Entersoft Social CRM

Entersoft Business Suite® | Entersoft CRM®

User guide & Implementation tips

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Identity

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Symbols in use

Symbol	Denotation
	User
	System administrator / Consultant
	Configuration
	Recommendation
	Note that...
	Example
	Attention
<ENTER>	Keyboard key
Menu / Submenu	Menu items / Commands

Entersoft Social CRM

An Entersoft consultant or your System Administrator will ensure that Entersoft Social CRM is connected to the chosen Facebook and Twitter accounts and that the social media activity on these accounts is regularly downloaded (see sections: 15 and 16). You can then utilize the evolving Social CRM functionality to effectively plan, post, and monitor your activity on the two most popular social networks: **Facebook** and **Twitter**. The following sections introduce the features and functionality of the new module:

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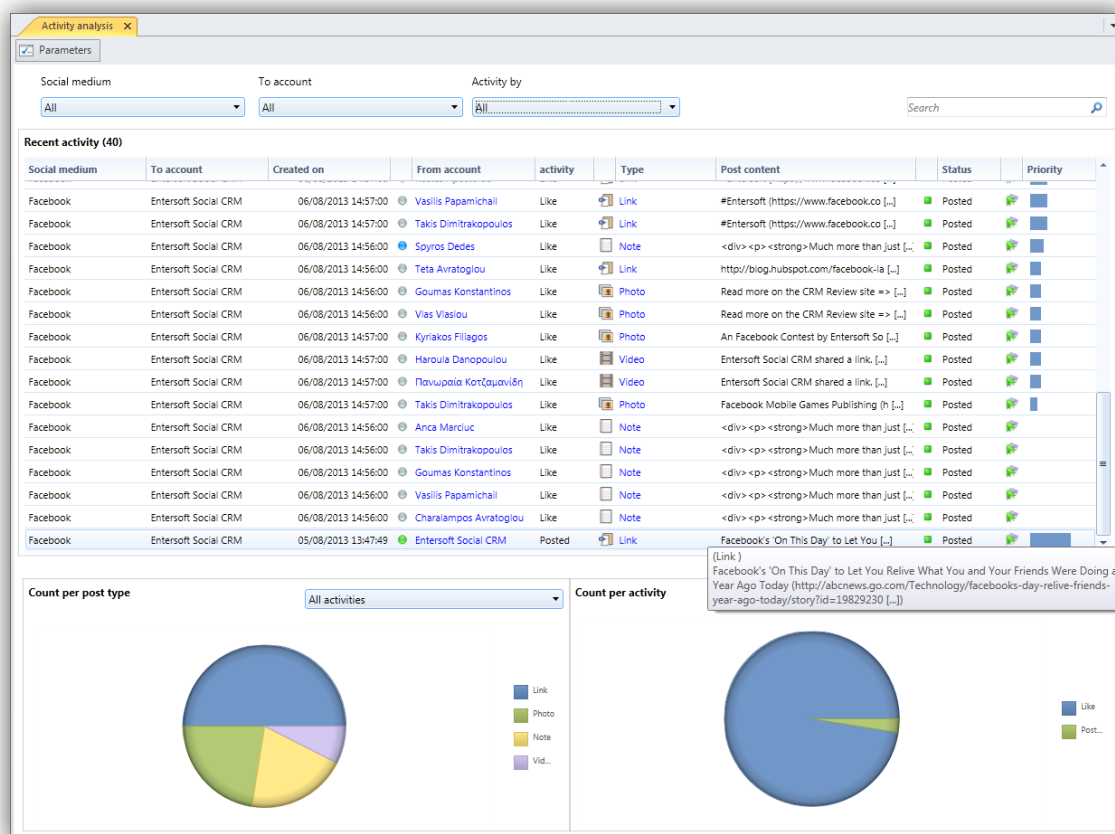
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1. Social media activity analysis

The interactive dashboard “Activity analysis” (Image 1) presents the activity on your accounts on a descending daily basis, ordered by priority, within a period of time. Your fans and followers post comments and updates, tweet, like or favorite your posts and so forth. This dashboard allows you to monitor this activity, initiated either by you or by your fans/followers, and supports your efforts for targeted and prompt responses. The dashboard also provides some concise information about the daily post trend and the post distribution by type and interaction.

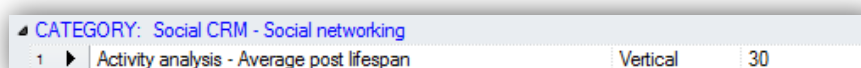
Image 1: Social media activity analysis



The average lifespan of a post

If a fan or a follower interacts with a post older than the defined (Image 2) average lifespan, the tooltip will include this info. This purely informative tip aims to help you evaluate and, maybe, reassess your posting strategies.

Image 2: Company parameters: Average post lifespan



The post priority is configurable by a set of three Company parameters that define the weighting factor for comments or replies, likes or favorites, shares or Retweets (Image 3). Besides the number of likes/favorites, shares/Retweets, comments/replies that each post has accumulated, the assessment of the specific fan/follower also contributes to the priority calculation.

The formula for the priority calculation

$$((\text{Number of Comments or Replies} \times \text{Weighting Coefficient for Comments or Replies}) + (\text{Number of Likes or Favorites} \times \text{Weighting Coefficient for Likes or Favorites}) + (\text{Number of Shares or Retweets} \times \text{Weighting Coefficient for Shares or Retweets}) + \text{absolute value of Reputation Points}) \text{ divided by } 10.$$

Image 3: Company parameters: Weighting coefficients

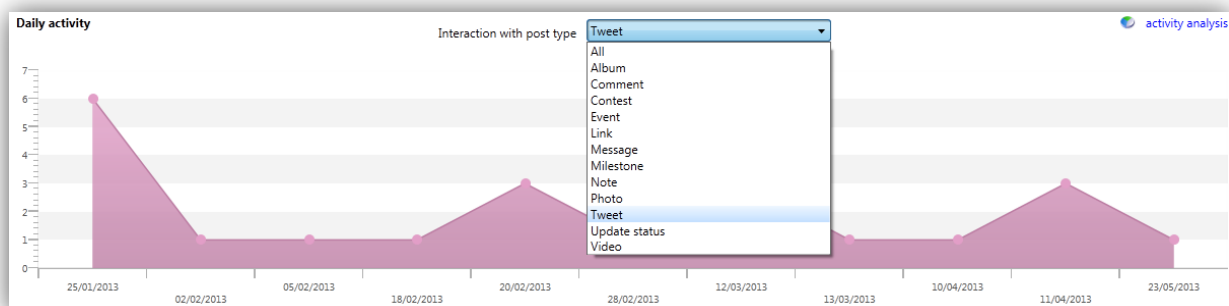
CATEGORY: Social CRM - Social networking			
248	Post priority - Weighting coefficient for Comments or Replies	Vertical	2
249	Post priority - Weighting coefficient for Likes or Favorites	Vertical	1
250	Post priority - Weighting coefficient for Shares or Retweets	Vertical	1

The dashboard allows you to **directly access** the **account** that performed an activity (e.g. liked a post) and the post per se, additionally to viewing its textual content through the corresponding tooltip.

The date filter allows you to focus on a specific date or period of time, while the three available selectors (Social medium, To Account, Activity by) can help you further narrow down the results. Note that the two **pie charts** at the bottom of the dashboard also **act as dynamic selectors**. This means that by clicking on a specific post type (bottom left pie chart) or/and interaction type (bottom right chart) you can focus on the activity you are most interested in, at some point.

Finally, visit to the **daily trend graph** to review the activity trends on your social accounts; here you may optionally focus on particular interaction types e.g. to review the participation to a facebook contest in a period of time.

Image 4: Social media activity analysis | activity trends

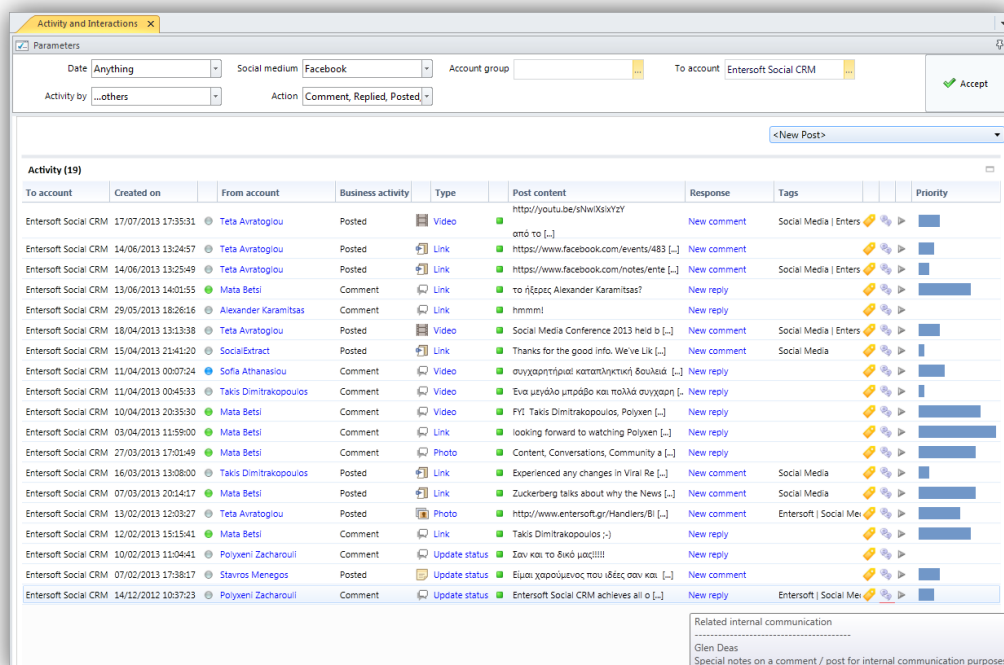


2. Activity & Interactions

The interactive dashboard “Activity and Interactions” includes (Image 5) a list quite similar to the list presented in the previous section. Here, the dashboard user is expected to initially define the filters and then perform a series of actions on the returned records. These actions are:

- **Create a new post:** This drop down selector allows the Entersoft Social CRM user to quickly create a new post based on the fans activity; e.g. in order to answer to a repeated question by fans and so forth.
- **Response:** depending on the recorded activity, the Dashboard will suggest the supported response type i.e. posting a new comment or a new reply.

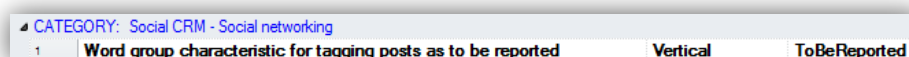
Image 5: Activity and Interactions



To account	Created on	From account	Business activity	Type	Post content	Response	Tags	Priority
Entersoft Social CRM	17/07/2013 17:35:31	Teta Avratogiou	Posted	Video	http://youtu.be/hNwXsiv72Y	New comment	Social Media Enters	
Entersoft Social CRM	14/06/2013 13:24:57	Teta Avratogiou	Posted	Link	https://www.facebook.com/events/483 [...]	New comment	Social Media Enters	
Entersoft Social CRM	14/06/2013 13:25:49	Teta Avratogiou	Posted	Link	https://www.facebook.com/notes/ente [...]	New comment	Social Media Enters	
Entersoft Social CRM	13/06/2013 14:01:55	Mata Betsi	Comment	Link	to ηζερος Alexander Karamitsas?	New reply	Social Media Enters	
Entersoft Social CRM	29/05/2013 18:26:16	Alexander Karamitsas	Comment	Link	hmmmm!	New reply	Social Media Enters	
Entersoft Social CRM	18/04/2013 13:13:38	Teta Avratogiou	Posted	Video	Social Media Conference 2013 held b [...]	New comment	Social Media Enters	
Entersoft Social CRM	15/04/2013 21:41:20	Sofia Athanasiou	Posted	Link	Thanks for the good info. We've Lik [...]	New comment	Social Media	
Entersoft Social CRM	11/04/2013 00:07:24	Takis Dimitrakopoulos	Comment	Video	συγχαρητήρια! καταπληκτική δουλειά [...]	New reply	Social Media	
Entersoft Social CRM	11/04/2013 00:45:33	Takis Dimitrakopoulos	Comment	Video	Ενα μεγάλο μπράβο και πολλά συγχαρη [...]	New reply	Social Media	
Entersoft Social CRM	10/04/2013 20:35:30	Mata Betsi	Comment	Video	PY: Takis Dimitrakopoulos, Polyxen [...]	New reply	Social Media	
Entersoft Social CRM	03/04/2013 11:59:00	Mata Betsi	Comment	Link	looking forward to watching Polyxen [...]	New reply	Social Media	
Entersoft Social CRM	27/03/2013 17:01:49	Mata Betsi	Comment	Photo	Content, Conversations, Community a [...]	New reply	Social Media	
Entersoft Social CRM	16/03/2013 13:08:00	Takis Dimitrakopoulos	Posted	Link	Experienced any changes in Viral Re [...]	New comment	Social Media	
Entersoft Social CRM	07/03/2013 20:14:17	Mata Betsi	Posted	Link	Zuckerberg talks about why the News [...]	New comment	Social Media	
Entersoft Social CRM	13/02/2013 12:09:27	Teta Avratogiou	Posted	Photo	http://www.entersoft.gr/Handlers/Bi [...]	New comment	Entersoft Social Me	
Entersoft Social CRM	12/02/2013 15:15:41	Mata Betsi	Comment	Link	Takis Dimitrakopoulos :-)	New reply	Entersoft Social Me	
Entersoft Social CRM	10/02/2013 11:04:41	Polyxeni Zacharouli	Comment	Update status	Ζωω και το δικό μου!!!!	New reply	Entersoft Social Me	
Entersoft Social CRM	07/02/2013 17:38:17	Stavros Menegos	Posted	Update status	Είμαι χαρούμενος που ιδέας σας και [...]	New comment	Entersoft Social Me	
Entersoft Social CRM	14/12/2012 10:37:23	Polyxeni Zacharouli	Comment	Update status	Entersoft Social CRM achieves all o [...]	New reply	Entersoft Social Me	

- **Tags:** This column contains the content tags (see section 11) of each post; next to it, the button  allows you to manually assign special content tags to the corresponding post. Note that not all content tags can be manually assigned through this particular action. The action automatically filters-out any tags that are not characterized as “to be reported”; i.e. the selectable content tags are those under the characteristic defined at the Company Parameter presented in Image 6. Posts tagged as such appear in the report: “Discussions to be reported” (Section 13). The purpose of assigning here these special content tags is to classify some posts as of a particular importance and, subsequently, to be able to view them, listed in a concise format as discussions (Section 13; Image 79), that can be exported and distributed for high-level, focused monitoring.

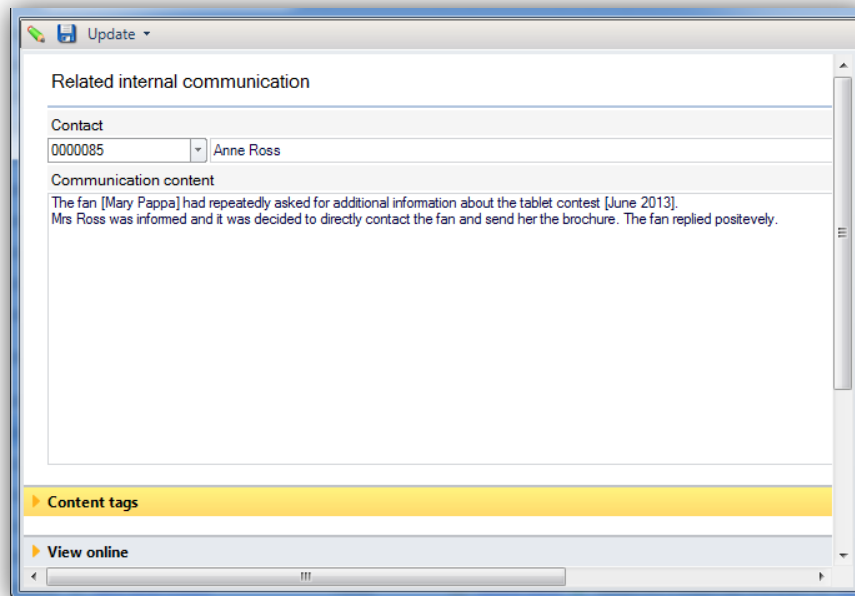
Image 6: Company parameters:



CATEGORY: Social CRM - Social networking		
1	Word group characteristic for tagging posts as to be reported	ToBeReported

- **Related internal communication:** Some posts necessitate the escalation of the issues they might ensue. In such cases, the person that monitors the daily posts can record information about **who** they informed about it and **what** was discussed and eventually decided. By clicking on the  button, the system displays a dialogue for editing the related information (Image 7). Note that this info is also included in the report: "Discussions to be reported" (Section 13).

Image 7: Editing related internal communication about a post



Update

Related internal communication

Contact

0000085 Anne Ross

Communication content

The fan [Mary Pappa] had repeatedly asked for additional information about the tablet contest [June 2013]. Mrs Ross was informed and it was decided to directly contact the fan and send her the brochure. The fan replied positively.

Content tags

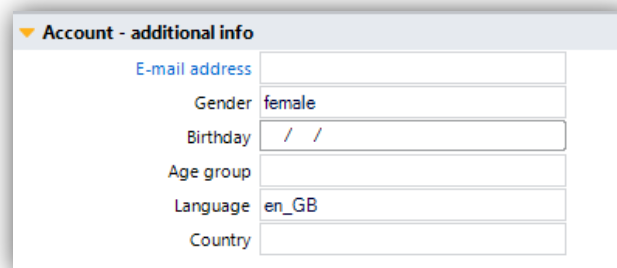
View online

3. Social media accounts

The social media users, which have interacted with your Facebook or Twitter account, are downloaded automatically as Social Media Accounts, along with any posts. By clicking on a specific account on the activity analysis dashboard, the Social Media Account UI form can be accessed (Image 11). There, you may:

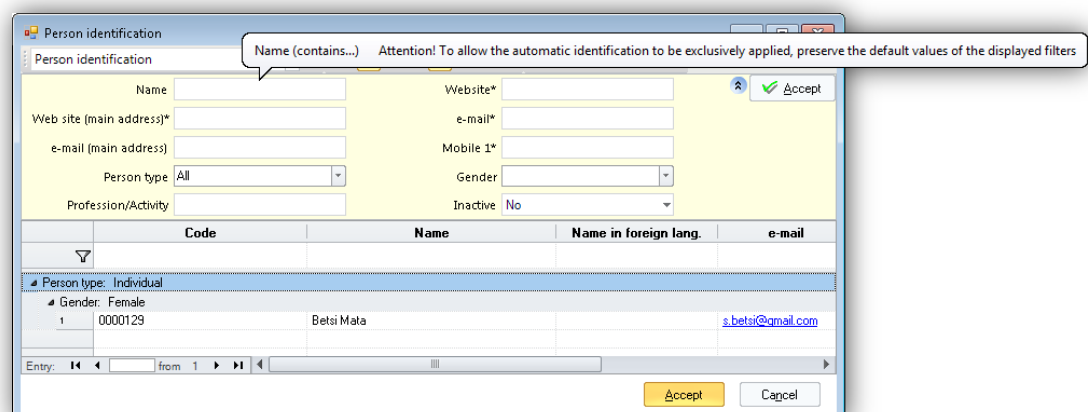
- Access the user's online profile.
- View information collected from special through media applications and the additional permissions granted by a user when participating e.g. in a facebook contest (see section: 8).

Image 8: Additional info from social media



- Associate the Social Media Account with a Person and, at the same time, review some basic info. Currently, when using shift+F3/F3 on the field: Person name, the system attempts to match the username of the social media account to a series of info (Name, email address, email or main address etc.) on existing Persons in order to make a valid proposal. Additional criteria are also available on the investigation list in order to help match Persons and Social Media Accounts effectively. To allow the automatic identification to be exclusively applied, you are advised to preserve the default values of the criteria on the investigation dialogue. If one or more criteria are altered then the system will return a list of the Persons that match your criteria and, at the same time, it will also attempt to include the automatic identification proposal.

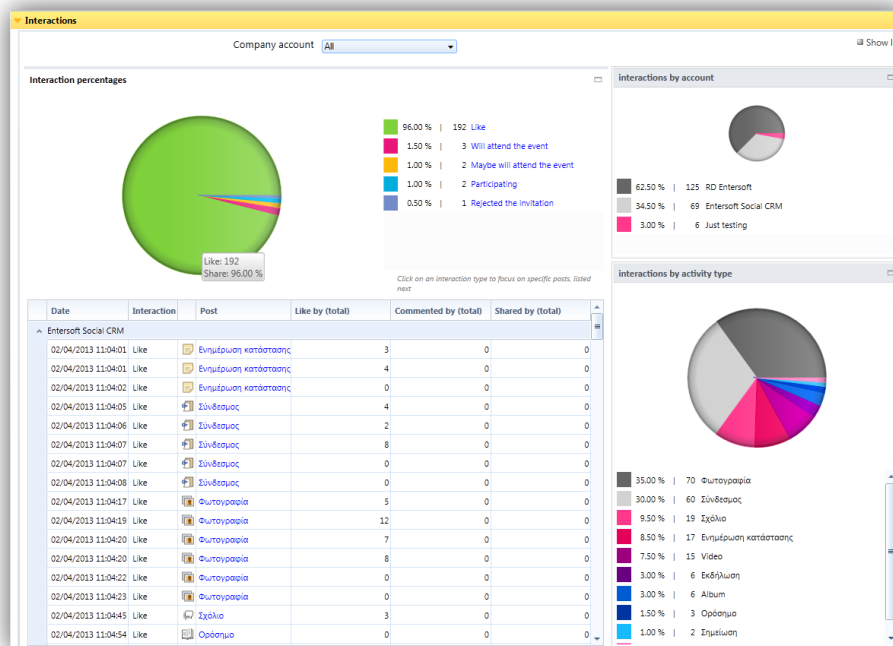
Image 9: Social media account – Investigation dialogue (F3 or Shift+F3) on the field: Person name



- Monitor the account's recent activity; note that the previously described dashboard (see section: 1) is also available in the Social Media Account context) along with the Activity administration list (see section: 4).
- You may also view a dashboard of the recorded interactions. A list is also available through the "show list" action. This dashboards presents the following info:

- Percentages by Interaction type. The memo of this pie chart is interactive and it can be used to focus on specific activities (posts, events and so forth).
- Interaction % per Company Account
- Interaction % per Activity Type

Image 10: Social media account interactions



- The particular form also incorporates functionality for **contacting the user** by standard email Facebook email¹. Note that the **CRM communication toolbar** is available in this context too.

Creating social media accounts manually

Until 2014 a Social Media Account could be also created manually through typing the user name and clicking on the "Get user profile info from Social Network". This is no longer supported.

Updating the profile of social media accounts

Entersoft Social CRM allows you to regularly select accounts and execute the "get profile data" process, which is available on the Account's UI Form and on the corresponding administration list.

Updating the profile of social media accounts in the background

When initializing a new implementation, you may wish to perform a bulk update of user's profile in the background. For this purpose, you may create a Scheduled Task using the view "ESTMSMAccountGetProfile-Social media accounts to be updated" and its Job Related automation. However, note that you should not schedule this task but merely "execute it now", especially if the number of user accounts is significant. You advised to save this task and execute it manually if needed. The view also provides a criterion that attempts to 'guess' if the update has been executed before and, by default, updates any accounts that, most probably, have not been updated in the past.

¹ Messages sent to facebook.com email addresses are forwarded to primary email addresses, so you can continue this conversation by email. <https://www.facebook.com/help/224049364288051>

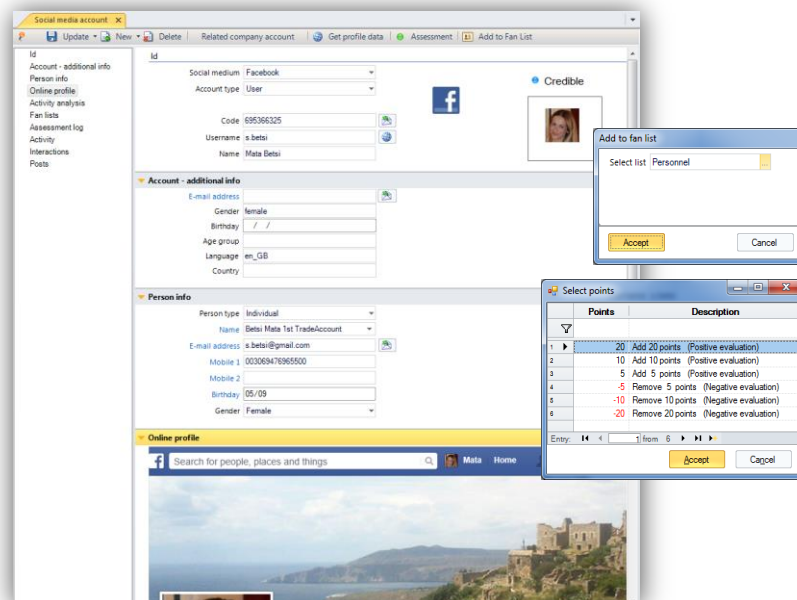
The application will download the Account's info from the corresponding Social Network. This includes information related to the user's public profile. This basic information, which can vary depending on the Social network, includes:

- name
- user id
- username²
- gender
- language (locale, the ISO Language Code and ISO Country Code)
- profile picture URL

The following information can be updated by associated facebook apps (e.g. a facebook contest, see section: 8) depending on the permissions such an app has requested and been granted by each user.

- The "public profile" permission also includes:
 - age range (possible age ranges are 13-17, 18-20, and 21+; max is not set if the age is 21+)
 - country
- The birthday permission
 - birthday
- The email permission
 - email

Image 11: Social network accounts (form)



Points	Description
20	Add 20 points (Positive evaluation)
10	Add 10 points (Positive evaluation)
5	Add 5 points (Positive evaluation)
-5	Remove 5 points (Negative evaluation)
-10	Remove 10 points (Negative evaluation)
-20	Remove 20 points (Negative evaluation)

Attention

The Facebook Platform Policies require that apps and websites explicitly ask for user permission to access their and their friends' info. When a user grants that permission, apps can store the info they receive, but they are not allowed to transfer user info without the user's consent or use this info for advertisements. In such cases, a user may contact you and request the info that he or she has previously shared with the app to be permanently deleted. <http://www.facebook.com/help/126030670809392/>

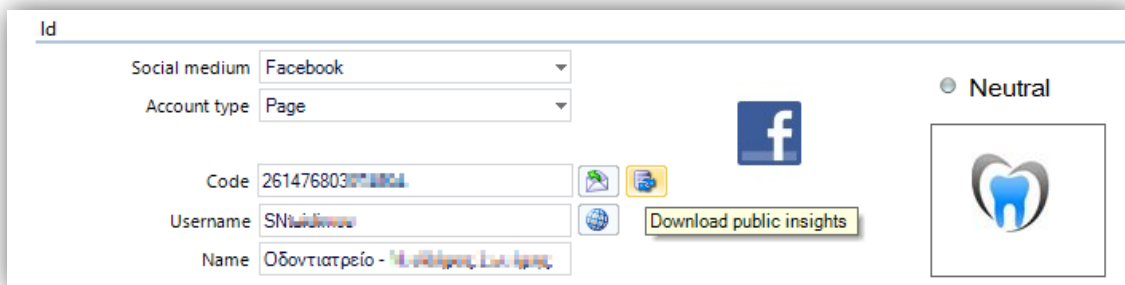
Attention

In some cases, Facebook does not return the user name of an account; this means that the particular account is **unverified** or no user name has been defined yet; this is **not uncommon as regards Facebook's user accounts**.

² Since 2015 Facebook stopped providing this info. Nevertheless the field is still available on the UI for backwards compatibility purposes. Please note that this field will be removed in the future.

- When Facebook Pages are not owned / administered by us we may choose to **download their public insights** (action on Social Media Accounts). This action is only available to administrators and the system warns us that it can be somewhat time consuming, depending on **Number of days for downloading past insights** (see p. 66) defined in the corresponding Company Parameter. The downloaded insights can be reviewed through the dashboard: Watch other pages (see corresponding section, p. 63).

Image 12: Download public insights



- Moreover, you may **assess the specific account** (positively or negatively, by clicking on the **Assessment** button) e.g. depending on his or her activity. You may also select more than one accounts and mass-assess them, since the action is available on the SM Account list too.

As aforementioned, the user's assessment contributes to the priority score of a post. The **assessment log** is also available on the SM Account UI form.

Assessment & Reputation Points

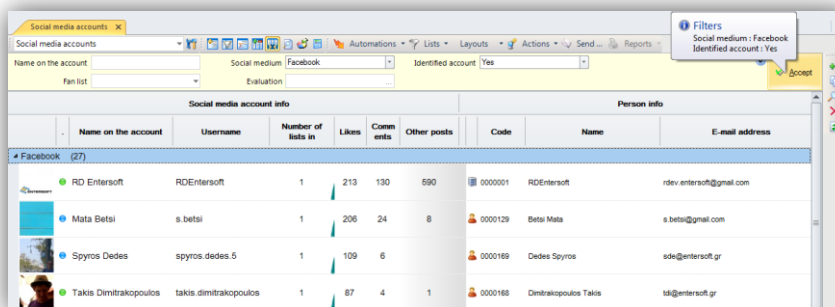
The new task category with Code "**ReputationPoints**" contains the points that can be added (positive assessment) or removed (negative assessment) to a user's reputation.

Based on the system scale "**ReputationScoreAnalysis**", the system assigns a characterization to the user (ranging from Exceptional to Unreliable) depending on the accumulated score.

- Finally, you can **access the related Social Media Company Account**, if any, by clicking on the **Related company account** button (see section: 15).

The complete list of the social network accounts is available at: Social Networking / User accounts / Account administration list (Image 13). This list also includes some concise information about the user **interactions**, the number of **Fan Lists** he or she belongs to, and the **associated Persons**, if any.

Image 13: Social network accounts (list)

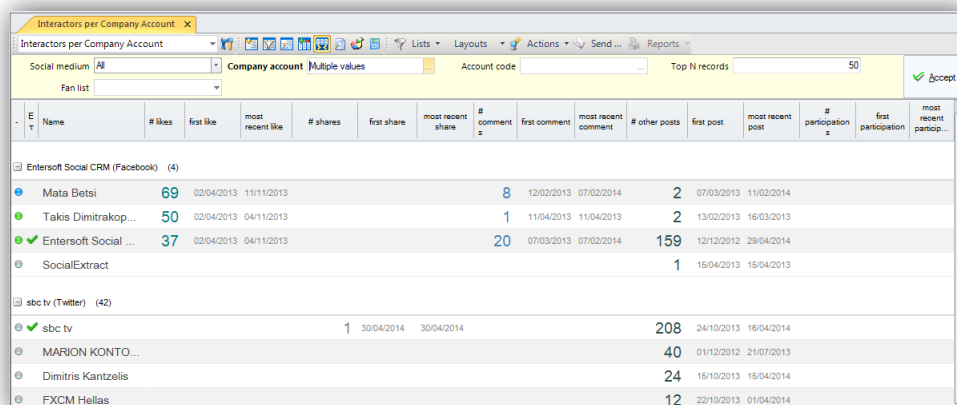


Name on the account	Username	Number of fans in	Likes	Comments	Other posts	Code	Name	E-mail address
RD Entersoft	RDEntersoft	1	213	130	590	0000001	RDEntersoft	rddev.entersoft@gmail.com
Mata Betsi	s.betsi	1	206	24	8	0000129	Betsi Mata	s.betsi@gmail.com
Spyros Dedes	spyros.dedes.5	1	109	6		0000169	Dedes Spyros	sde@entersoft.gr
Takis Dimitrakopoulos	takis.dimitrakopoulos	1	87	4	1	0000168	Dimitrakopoulos Takis	td@entersoft.gr

Social Media Accounts as 'Interactors'

In order to access the information about Interactors³ grouped by the Company Accounts that they have interacted with, the Interactors list is provided. The report presents the fans/followers in descending order based on the number of some of their interactions.

Image 14: Interactors per Company SM account



Name	# likes	first like	most recent like	# shares	first share	most recent share	# comments	first comment	most recent comment	# other posts	first post	most recent post	# participations	first participation	most recent participation
Entersoft Social CRM (Facebook) (4)															
Mata Betsi	69	02/04/2013	11/11/2013				8	12/02/2013	07/02/2014	2	07/03/2013	11/02/2014			
Takis Dimitrakop...	50	02/04/2013	04/11/2013				1	11/04/2013	11/04/2013	2	13/02/2013	16/03/2013			
Entersoft Social ...	37	02/04/2013	04/11/2013				20	07/03/2013	07/02/2014	159	12/12/2012	29/04/2014			
SocialExtract										1	15/04/2013	15/04/2013			
sbc tv (Twitter) (42)															
sbc tv				1	30/04/2014	30/04/2014				208	24/10/2013	16/04/2014			
MARION KONTO...										40	01/12/2012	21/07/2013			
Dimitris Kantzelis										24	15/10/2013	15/04/2014			
FXCM Hellas										12	22/10/2013	01/04/2014			

Specifically, the report presents info about a fan's:

- **Likes:** the number of likes and the dates when the first and the last like occurred on.
- **Shares:** the number of **retweets** and the dates when the first and the last like occurred on.
- **Comments:** the number of comments and the dates of the first and the last comment.
- **Other posts:** the number of original posts/tweets and the dates of the first and the most recent post.
- **Participations:** the number of times that a user has participated in a facebook contest (see section: 8) and the dates of the first and the most recent participation.

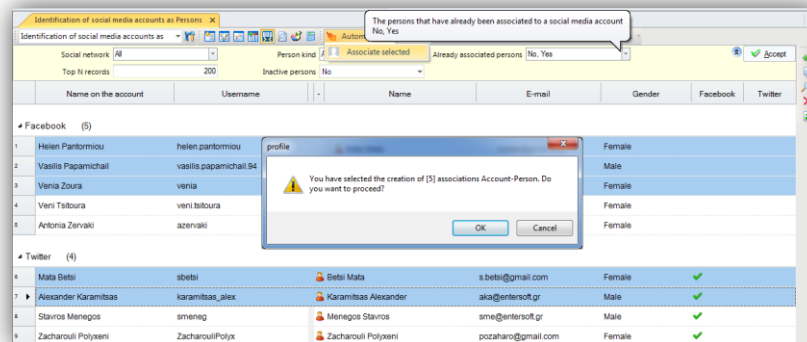
Note that the Company Accounts are also included in this list; these can be filtered out using the standard Entersoft framework functionality that is available on all lists.

Bulk identification of Social Media Accounts

In order to associate many social media accounts to persons at once, the application provides a list that attempts to match the username of the social media account to a series of info (Name, email address, email or main address etc.) on existing Persons in order to make a valid proposal, similarly to the Shift+F3/F3 functionality described above. Several criteria are available in order to help match Persons and Social Media Accounts effectively. The user needs then to select and, thus, confirm the rows as identified pairs and, then, execute the "Associate selected" action, as shown in Image 15. The bulk identification is available under the menu: Social Networking / Persons.

³ I.e. the users that have performed some kind of action/activity on our accounts

Image 15: Bulk identification of social media accounts with existing Persons

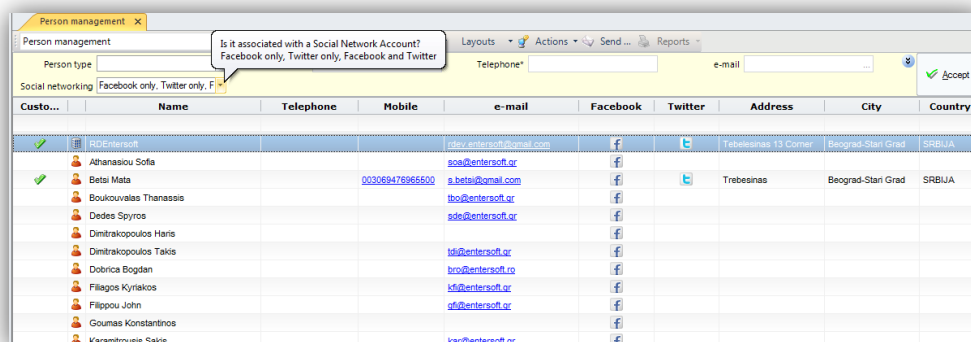


Persons and Social media accounts

When associated to a Person, the related reporting and info becomes available at the Person's form too, in the newly added expander: "Social media account Profile". Specifically, the expander includes a list of the associated social media accounts, the activity of these accounts, and the recorded interactions.

A specialized Person list is also available in this context (Image 16); this list also includes information about whether the person is associated to at least one Twitter or Facebook account and a corresponding filter. The "Social Network Account Profile" is available on the related Customers too.

Image 16: Social networking / List of Persons

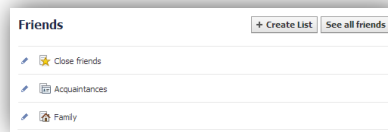


Further to this list, a **CSV formatted list** is also available (Social Networking / Persons / CSV export). This list allows you to export the emails of your Business Associates (registered as Persons in EBS), in a Facebook compatible CSV format, and import them to Facebook in order to invite them to like your Facebook fan page and build your audience. Use the  **Send ...** button to export the emails.

Fan lists

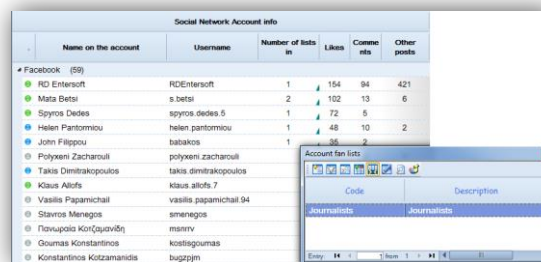
You may also associate the account to one or more **Fan Lists**. The system supports the creation of Fan lists in order to help you classify your fans and followers and, moreover, filter any activity based on such lists. The concept is quite similar to the friend lists introduced by facebook (Image 17). Click on the **"Add to Fan List"** button and select the list you wish to add the account to. The functionality is also available at the social media accounts list.

Image 17: Facebook - lists of friends



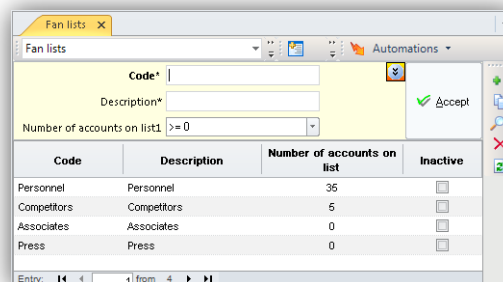
When clicking on the “number of lists in” column, the name and the description of the lists are presented in a pop-up.

Image 18: Social Media Account and Fans Lists (pop-up)



The system comes with four default fan lists, namely: Associates, Competitors, Press, and Personnel, as presented in Image 19.

Image 19: The four default fan lists

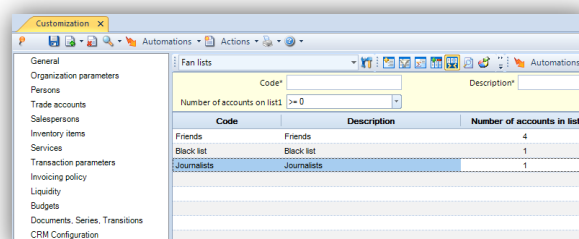


You may also review the lists an account belongs to, through the corresponding expander on the account form. Most monitoring lists and dashboards in the system can filter posts and post analysis data based on fan lists.

Some additional info about fan lists

Fan lists are standard Entersoft Static Lists, applied on the ESTMSMAccount entity. All lists applied on the particular entity are available in the Customization panel, under the Social Networking node, as presented in Image 20. An action (automation) is also available for creating a new fan list by merely defining a code and a description for the new list; by default a new static list on the ESTMSMAccount entity is then created.

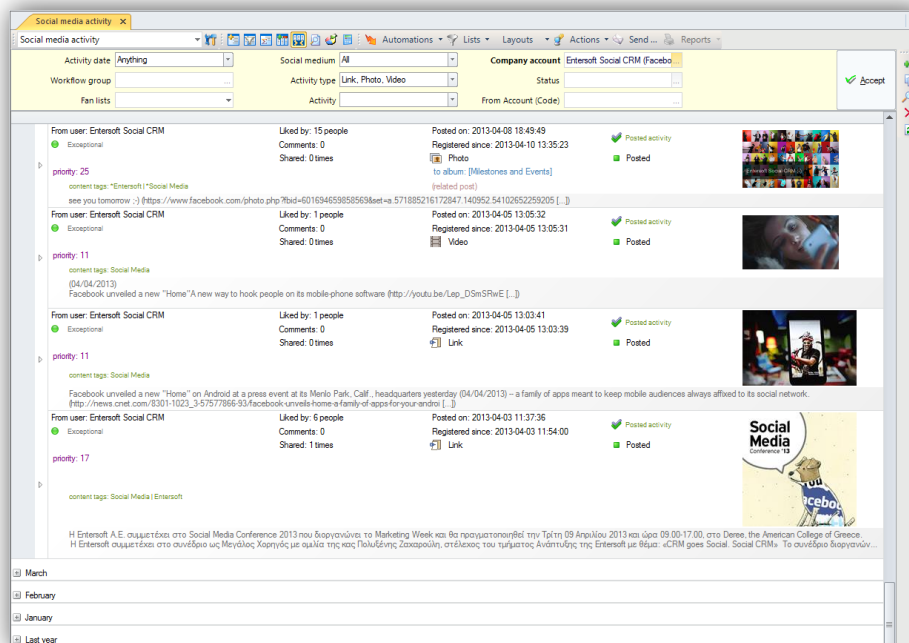
Image 20: Fan lists



4. Social media activity administration

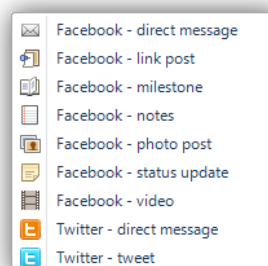
The main administration list (Social networking / Activity administration; Image 21) incorporates information related to the date of the activity, the number of likes/favorites, shares/Retweets, replies/comments per post, the priority score, the assessment of the user and so forth. Similarly to the "Recent Activity" dashboard, the list presents activity from any of the supported social media (i.e. both Twitter and Facebook) and from all of the connected social media accounts and you may choose to focus on the **activity by others** or even focus on the **activity by a specific fan list**.

Image 21: Social media activity | administration list



This report provides functionality for the effective **daily monitoring** of the currently supported post types and, more importantly, **efficient interaction** with your fans and followers. Here, you can **create** any of the post types presented in Image 22. Facebook direct messages are also downloaded and listed here; however, sending direct messages as a page to your fans is not currently supported.

Image 22: Types of posts currently supported



New post

Note that, in order to create a post of any of the supported post types, you can *alternatively* use the shortcut menu "New", which is available under the Social Networking node.

- Each post type has a **tailored form** (e.g. Image 23, Image 24) and provides functionality for:
 - Online view
 - Viewing any related comments and replies in context
 - Viewing any interactions (otherwise called 'effects') per post, and so forth.

Currently supported types of posts

The currently supported post types (task types) are listed in Tools and Configuration / Customization / Social Networking / Task Types (see also: Baseline social CRM configuration, on page 67)

Image 23: A tweet from a follower to our account

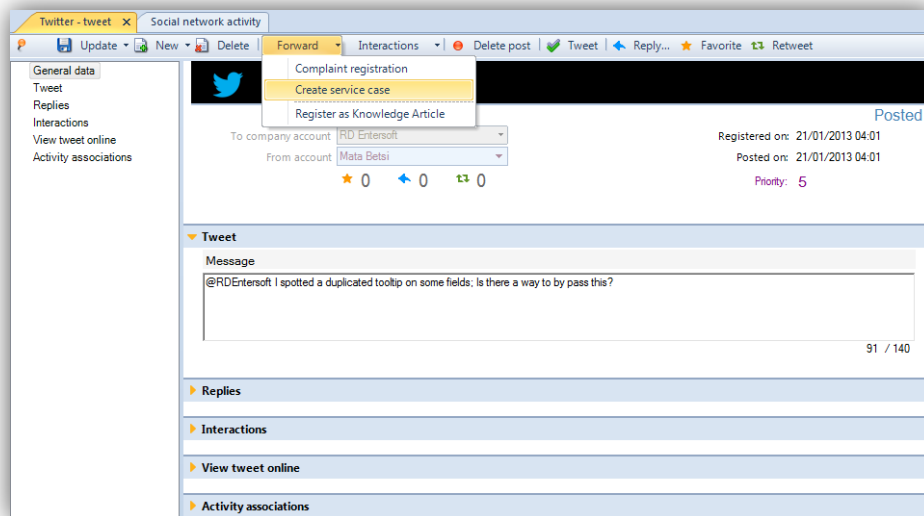
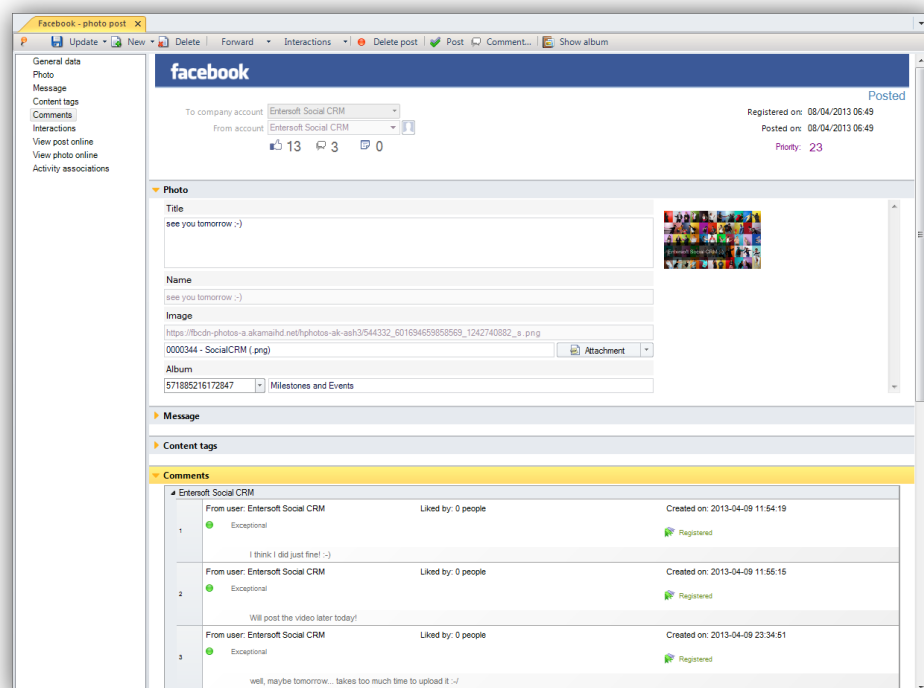


Image 24: A photo post and the comments in context



When creating a new post, regardless its specific type and the social medium, you first need to select the Company Account (Field: **"To company account"**; i.e. the facebook fan page or the twitter account) you wish the post to be posted to. You can click on the  button to directly access the social media account that created the specific post.

Status update

In the case of a facebook status update, you simply need to type the text you wish and then save it or post it.

Note that...

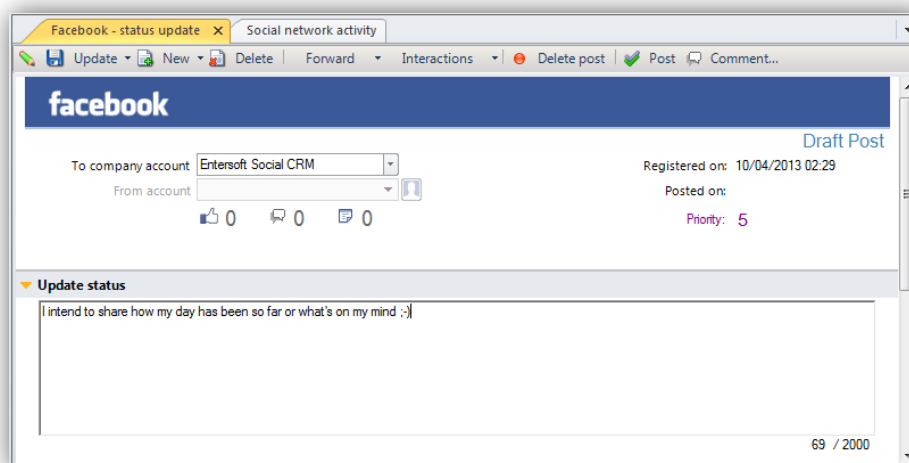
You can check for spelling mistakes (use the F7 key on keyboard) in any of the following languages: Greek, English, Romanian, and Bulgarian.

When saving a new post, the initial status is **"Draft"**. To post it to the corresponding Social Network, click on the  button (or, in case of Twitter, ). After posting, the status of the Post will change to **"Posted"**. The various alternative statuses of a social media activity are described in the **"Social Network Activities"** status collection.

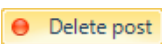
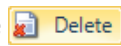
Note that...

It is not required to save before posting.

Image 25: Creating a new status update

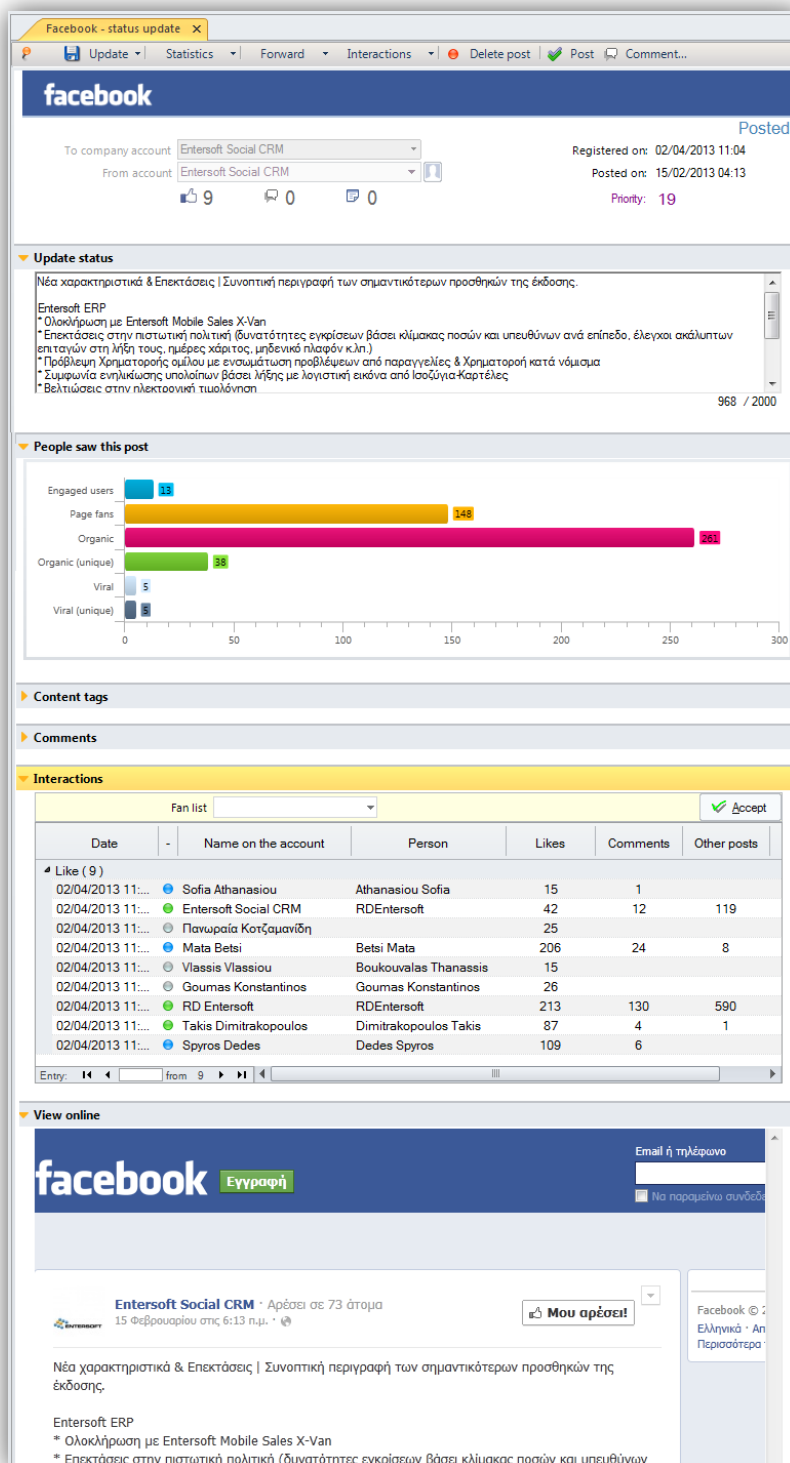


Having saved/posted your status update, the UI form becomes richer and you can immediately access the following: the **content tags** (see section: 11), the list of the **comments** made on this status update, some brief insights regarding the **people that saw this post**, the list of the **interactions** (see section: 7), and you may also access the **online view** of the post. The character counter on the right bottom of the form does not denote a limitation or restriction; it is there to help us keep track of the post length.

To delete a post from your facebook timeline press ; the application will ask you to confirm your intention which, of course, cannot be undone. The status of the post will then change to **"Deleted"**. The  button does not affect the posts on your facebook account; it's there to help you delete **drafts** etc.

Note that the features and the logic behind posting a status update largely apply to most types of facebook posts.

Image 26: Viewing a Status Update, posted on our page



Facebook - status update

To company account: Entersoft Social CRM
From account: Entersoft Social CRM

Registered on: 02/04/2013 11:04
Posted on: 15/02/2013 04:13
Priority: 19

Update status

Νέα χαρακτηριστικά & Επεκτάσεις | Συνοπτική περιγραφή των σημαντικότερων προσθηκών της έκδοσης.

Entersoft ERP
* Ολοκλήρωση με Entersoft Mobile Sales X-Van
* Επεκτάσεις στην πιστωτική πολιτική (δυνατότητες εγκρίσεων βάσει κλίμακας ποσών και υπευθύνων ανά επίπεδο, έλεγχος ακόλυπτων εργασιών στη λήξη τους, ημέρες χάριτος, μηδενικό πλαφόν κ.λπ.)
* Πρόβλεψη Χρηματορροής ομίλου με ενασμάτωση προβλέψεων από παραγγέλματα & Χρηματοροή κατά νόμισμα
* Συμμετοχή στην εκκίνηση υπολοίπων βάσει λήξης με λογιστική εικόνα από Ισοζύγιο-Καρτέλες
* Βελτιώσεις στην ηλεκτρονική τιμολόγηση

968 / 2000

People saw this post

Category	Count
Engaged users	13
Page fans	148
Organic	261
Organic (unique)	38
Viral	5
Viral (unique)	5

Content tags

Comments

Interactions

Fan list

Date	Name on the account	Person	Likes	Comments	Other posts
02/04/2013 11:...	Sofia Athanasiou	Athanasiou Sofia	15	1	
02/04/2013 11:...	Entersoft Social CRM	RDEntersoft	42	12	119
02/04/2013 11:...	Παναγιώτα Κοτζαμανίδη		25		
02/04/2013 11:...	Mata Betsi	Betsi Mata	206	24	8
02/04/2013 11:...	Vlassis Vlassiou	Boukouvalas Thanassis	15		
02/04/2013 11:...	Goumas Konstantinos	Goumas Konstantinos	26		
02/04/2013 11:...	RD Entersoft	RDEntersoft	213	130	590
02/04/2013 11:...	Takis Dimitrakopoulos	Dimitrakopoulos Takis	87	4	1
02/04/2013 11:...	Spyros Dedes	Dedes Spyros	109	6	

Entry: 14 from 9

View online

facebook Εγγραφή

Email ή τηλέφωνο

Να παραμείνω συνδεδεμένος

Entersoft Social CRM · Αρέσει σε 73 άτομα
15 Φεβρουαρίου στις 6:13 π.μ. · 

Μου αρέσει!

Facebook © · Ελληνικά · Αν Περισσότερα

Νέα χαρακτηριστικά & Επεκτάσεις | Συνοπτική περιγραφή των σημαντικότερων προσθηκών της έκδοσης.

Entersoft ERP
* Ολοκλήρωση με Entersoft Mobile Sales X-Van
* Επεκτάσεις στην πιστωτική πολιτική (δυνατότητες εγκρίσεων βάσει κλίμακας ποσών και υπευθύνων

Comments & Replies

As aforementioned, comments and any replies can be viewed in the context of the main post (through the corresponding expander). As regards the "Activity administration" list, comments are by default excluded from the first level of the list (Image 28). On the list level you can choose to either choose to view the comments in the second level of the list, as shown in Image 29,

or you can choose to include them in the first level; this second option will result a twitter-like presentation of the post-comments-replies, i.e. similar to tweets-replies. In the case of twitter, one will view replies both in context and listed in the feed. As shown in Image 27, replies are clearly denoted.

Image 27: A reply

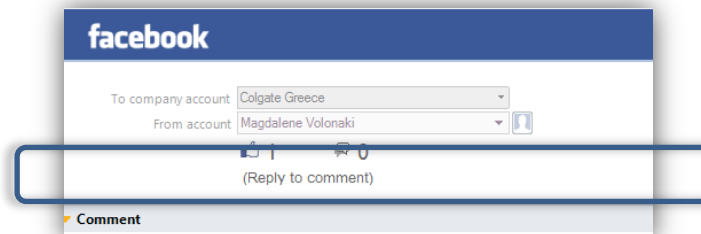


Image 28: Default post types listed in Activity administration

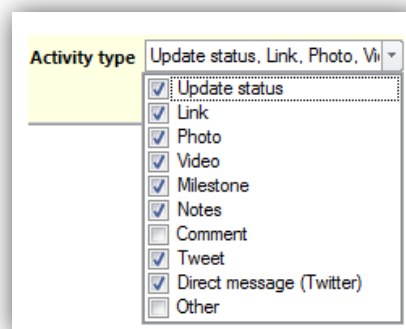


Image 29: Activity administration | Comments in context

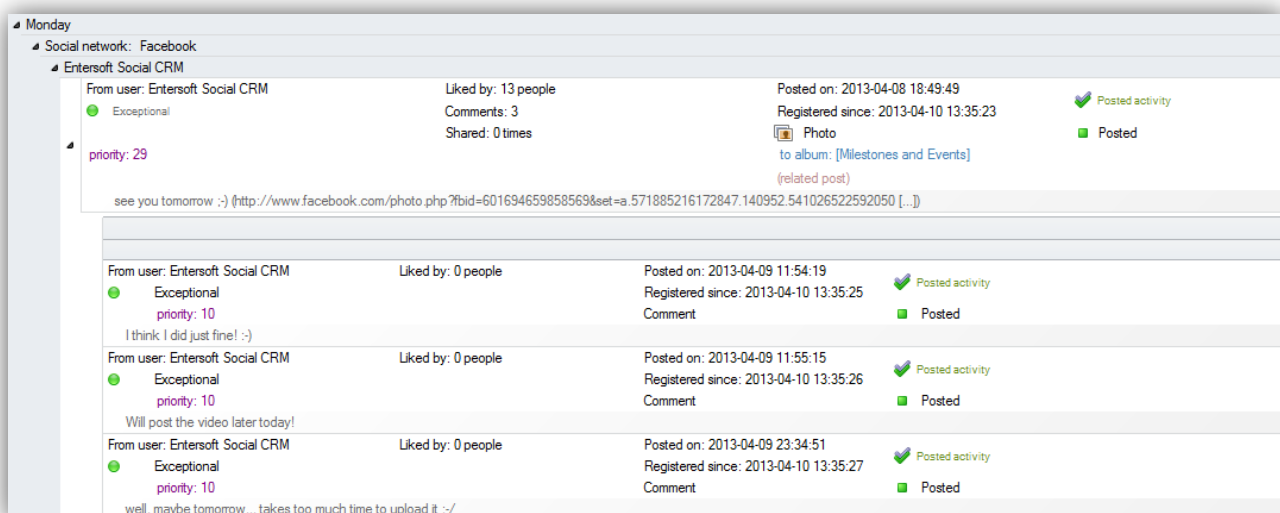
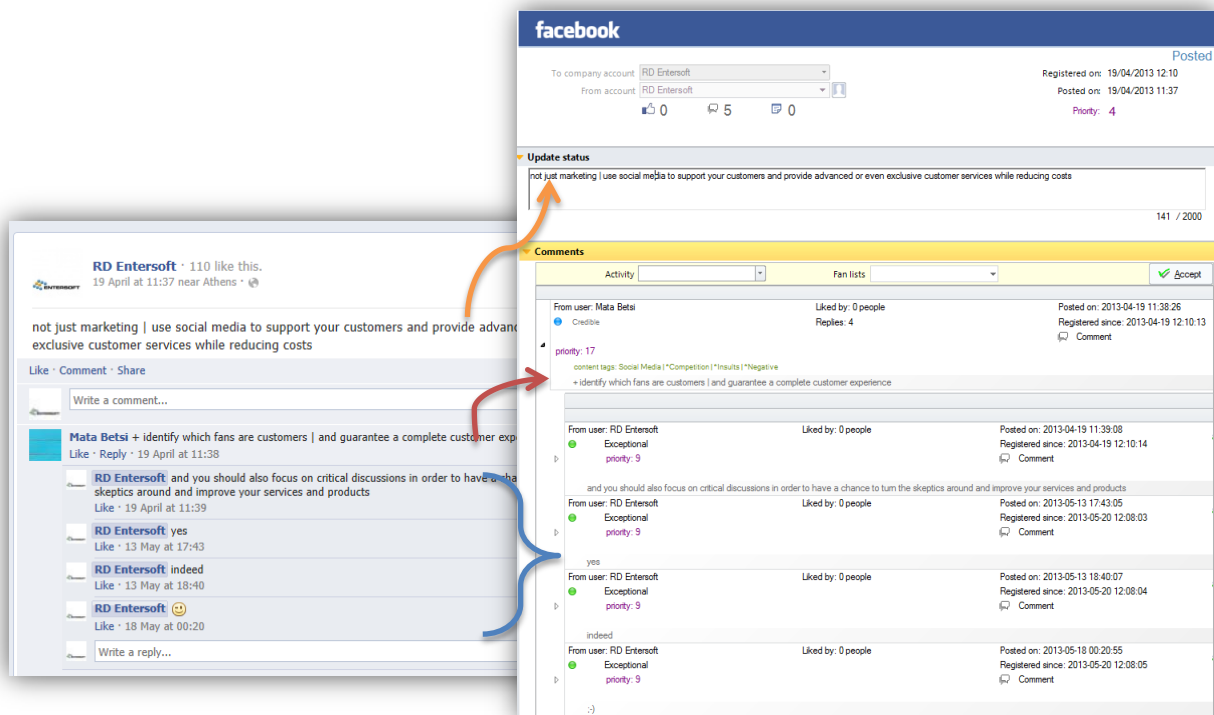
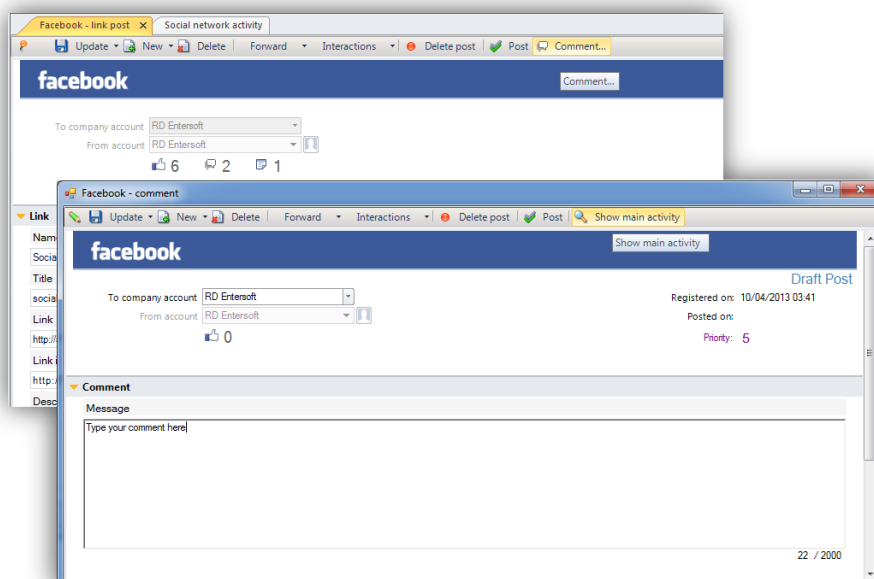


Image 30: A Post, its comments and the replies on comments
Note that the comment counter at the top includes any replies too.



If you wish to comment on a post, you first need to open it for viewing and then click on the **Comment...** button. A new pop up form will then open, as shown in Image 31. The facebook account is automatically filled-in by the system. Besides that, similarly to creating a Status update, you can type your comment and check it for spelling errors and then post it. Assuming that you opened the UI Form of a comment, you can go to its main activity (i.e. the post it refers to) by clicking on the **Show main activity** button.

Image 31: New comment on an existing post



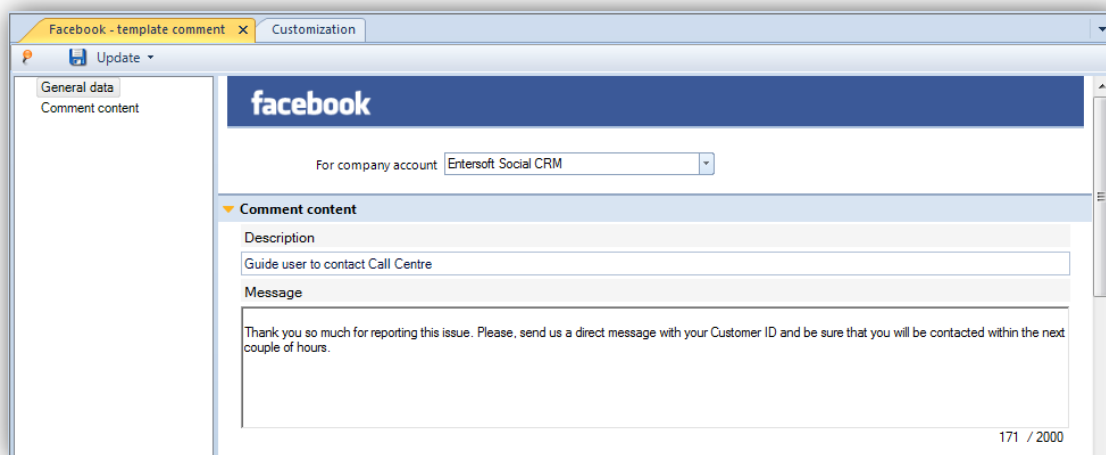
Template comments

As is often the case, social media account administrators repetitively post standard comments e.g. to encourage users to provide them further details on an issue or contact them in some other way. These messages can be largely standardized in Entersoft Social CRM as "Template Comments". Template comments can be created and edited in the Customization environment (i.e. menu: Tools and Configuration / Customization / Social networking / Template comments.)

Note that...

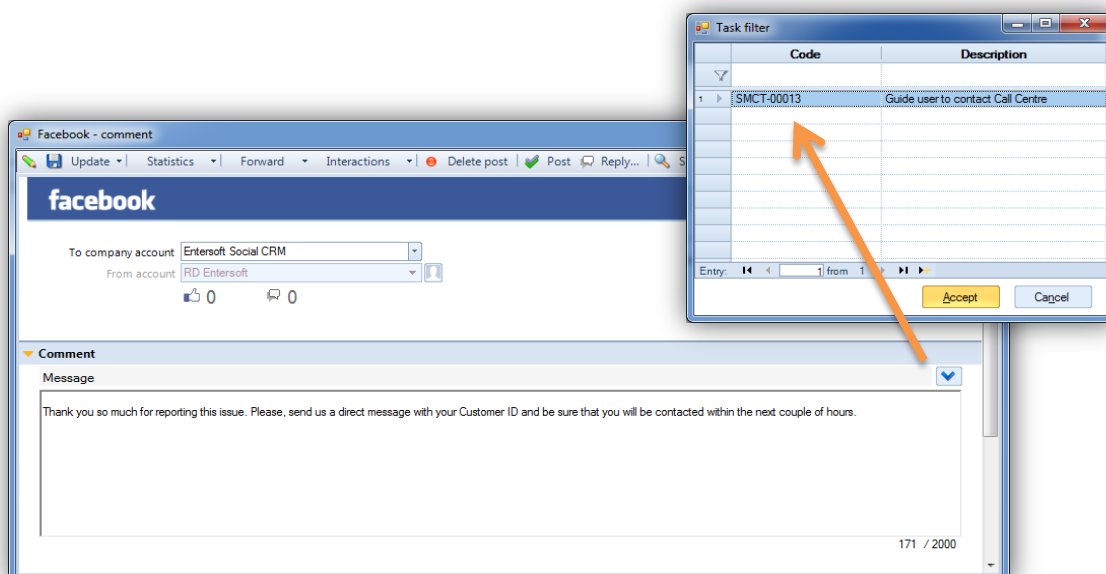
In Customization, you can define the **facebook account** these may be related to and, moreover, a **description** that will help the Entersoft Social CRM users easily select the appropriate template comment.

Image 32: A template comment



The containing text of a template comment is not restrictive. Template comments primarily work as a fast and safe way to post new, yet standard comments. The  button displays the list of the available Template Comments and the user selects one; the text is copied to the new comment and, then, the user may edit and adjust the comment appropriately.

Image 33: Selecting a template comment when editing a new comment

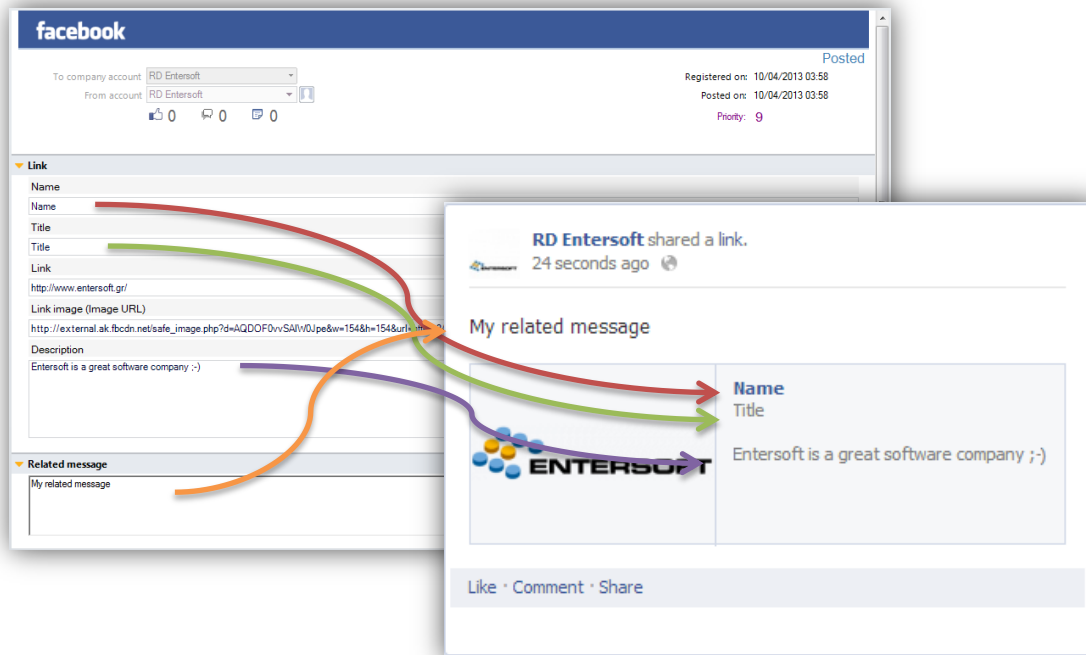


Code	Description
SMCT-00013	Guide user to contact Call Centre

Posting a link

In order to create a link post, you only need to type or paste a link to the corresponding field of a link post. The other data will be automatically filled in by facebook according to the information of the site you are linking to. However, you may wish to define those details according to your preferences and by-pass the site's defaults. Image 34 presents what field corresponds to what part of the displayed link post. However, you do not get to define your own link image; this depends solely on the site you are linking to and, for the time being, you cannot select one among the available as when you are posting a link directly on facebook.

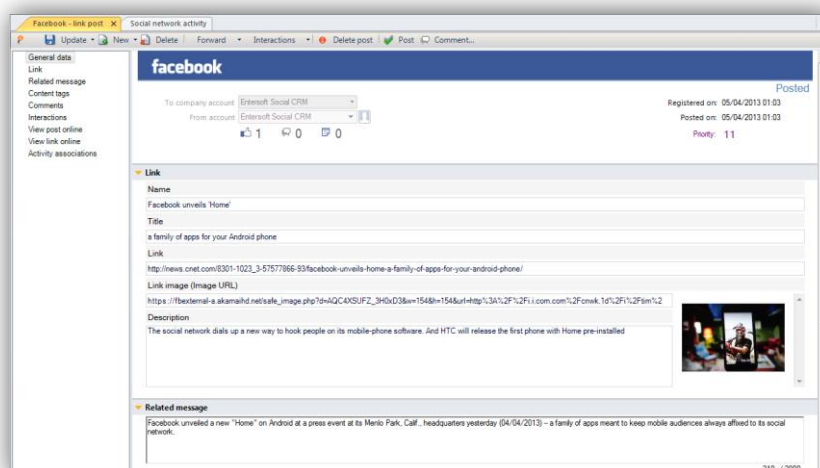
Image 34: "Where goes what?" the components of a facebook link post



Note that...

If the name of the link exceeds the 100 characters, any characters in the name past this limit will be truncated automatically when posted to facebook. The same applies for the link title (50 characters) and the link description (300 characters).

Image 35: A posted link



Posting a photo

When posting a photo we can optionally define its Title (which facebook will set as the photo's name too), the album the photo is to be included (if not selected then the default application album will automatically include this photo), and of course the image file. In order to facilitate the selection of a photo that it is desired to be posted, it is possible to select it either from the **System's blob data**, or from the **Attachment List** or, alternatively, from the **hard disk** (Image 37). Therefore, the available content can be effectively and efficiently **reused**.

Image 36: A photo post

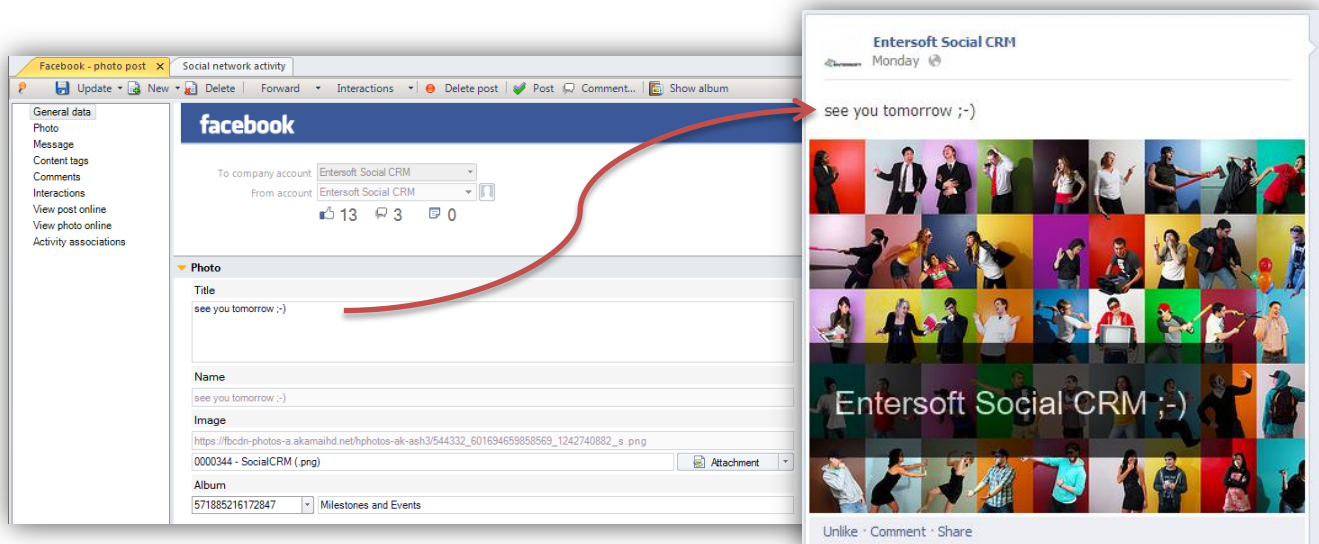
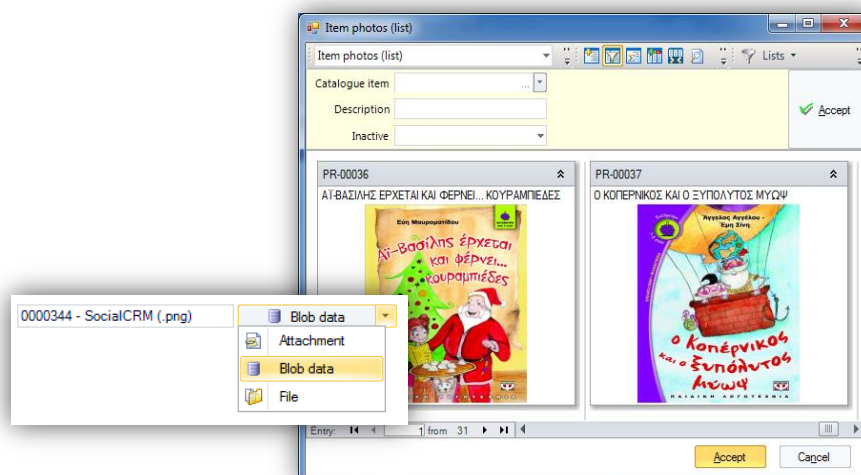


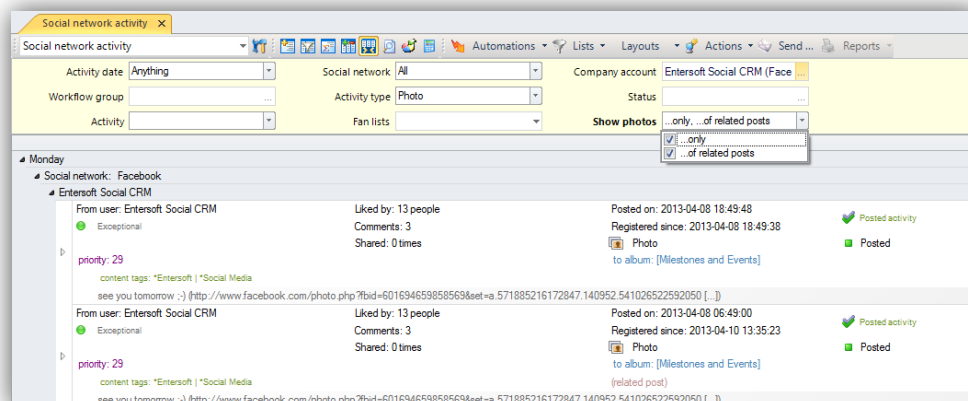
Image 37: New photo post | Selecting an image to be posted



Note that...

When posting a photo, facebook creates two posts: one for the photo per se and a related photo post. You may choose to exclude from the activity list either the photo or the related photo post, for your convenience. Keep in mind that it is the related post that keeps the information of how many times the photo has been shared (Image 38).

Image 38: Photos and Related Posts



Posting a video

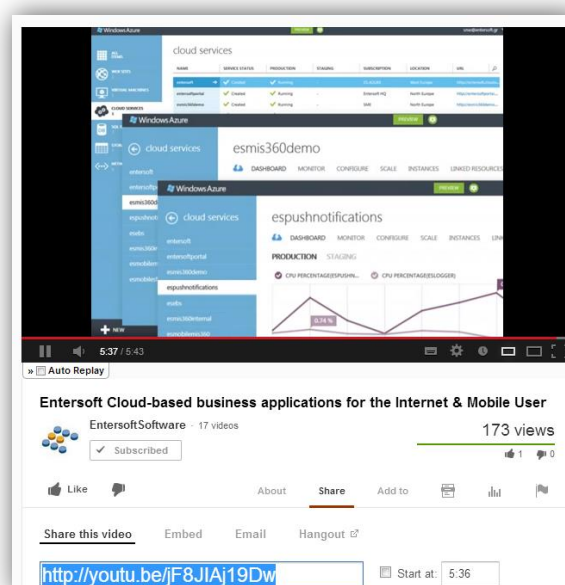
When posting a video you can choose to either post a video from youtube or, alternatively, you can use a video file that is available on the hard disk or as an EBS attachment.

- In order to post a **youtube video**, you need to paste the video's URL to the field: "link" and, optionally, define the description of the video. If you define a video title, this will be overwritten by the actual video title on youtube.
- The video title is used when posting video files. In this case, you need to allow a short period of time for facebook to send back to Entersoft Social CRM the post info that is defined by facebook, i.e. the "from account", the "posted on" date, and the URL of the video post, in order for you to be able to use the online view. These data will be updated the next time the application is scheduled to download facebook posts; therefore, it depends on the implementation choices.

It is recommended that...

When posting youtube videos you use the URL that youtube provides under the "Share" section; this way you ensure that the video post will be presented as a video player rather than as a common link.

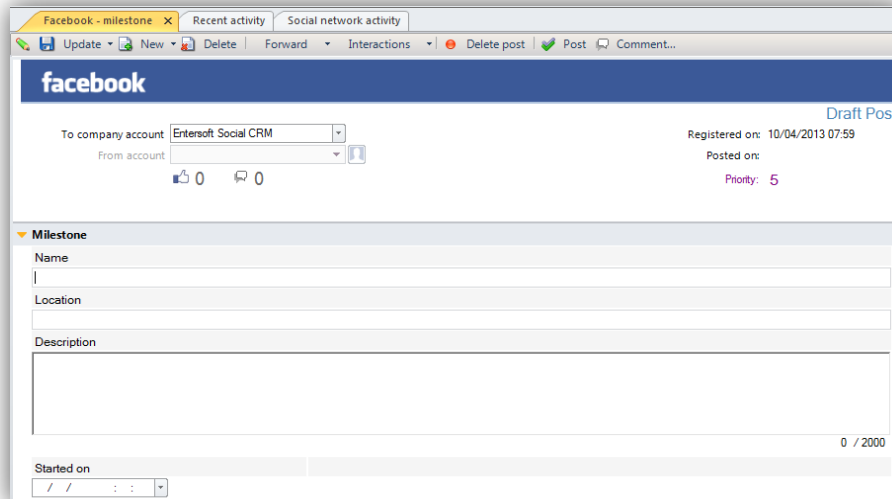
Image 39: Share this video URL



Posting a milestone

When posting a milestone you can define a Title and a description and the time (Image 40). Keep in mind that if you wish to select a photo for your milestone or define its location, facebook requires doing these actions online i.e. either from the online view expander or from the facebook page itself.

Image 40: Creating a new milestone

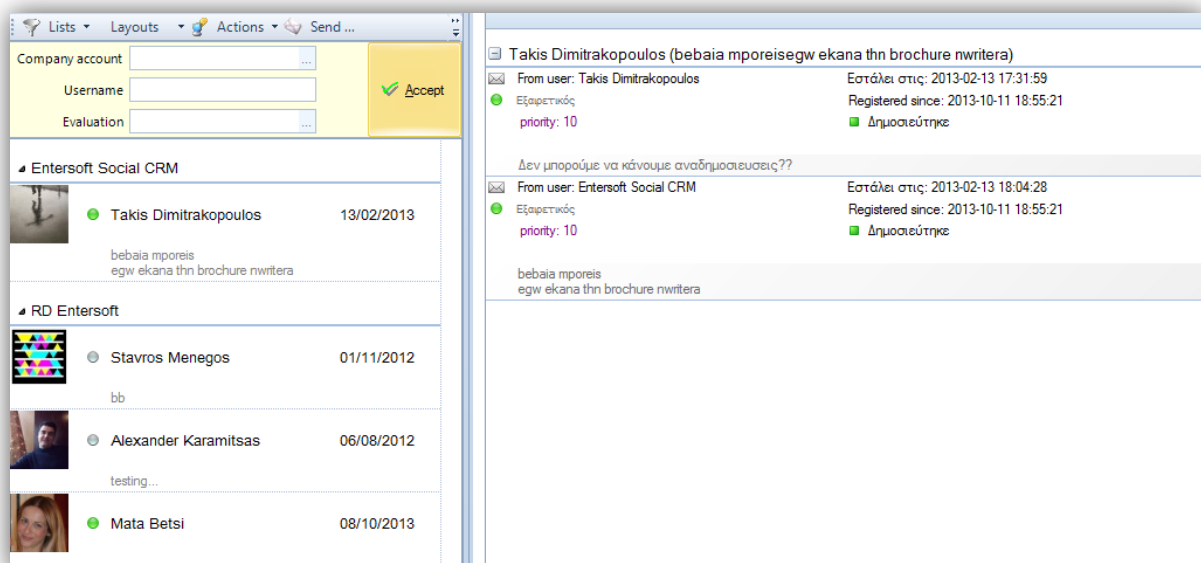


The screenshot shows a web browser window with the 'facebook - milestone' tab active. The page has a blue header with the 'facebook' logo. Below the header, there's a 'Draft Post' section with fields for 'To company account' (set to 'Entersoft Social CRM') and 'From account'. It also shows 'Registered on: 10/04/2013 07:59', 'Posted on:', and 'Priority: 5'. Below this is a 'Milestone' section with fields for 'Name', 'Location', and 'Description'. At the bottom, there's a 'Started on' date field and a '0 / 2000' character count.

Facebook inbox

Both Facebook and Twitter direct messages are listed in all administrative lists. However, as regards Facebook a dedicated form has been created; this form simulates the structure of a typical Facebook inbox. As presented in Image 41, the conversations are listed on the left part of the form, grouped by Company Account, whereas on the right the messages exchanged in the context of the selected conversation are listed. Facebook inbox is available under the corresponding menu (i.e. Social Networking / Facebook inbox).

Image 41: Facebook inbox on Entersoft Social CRM

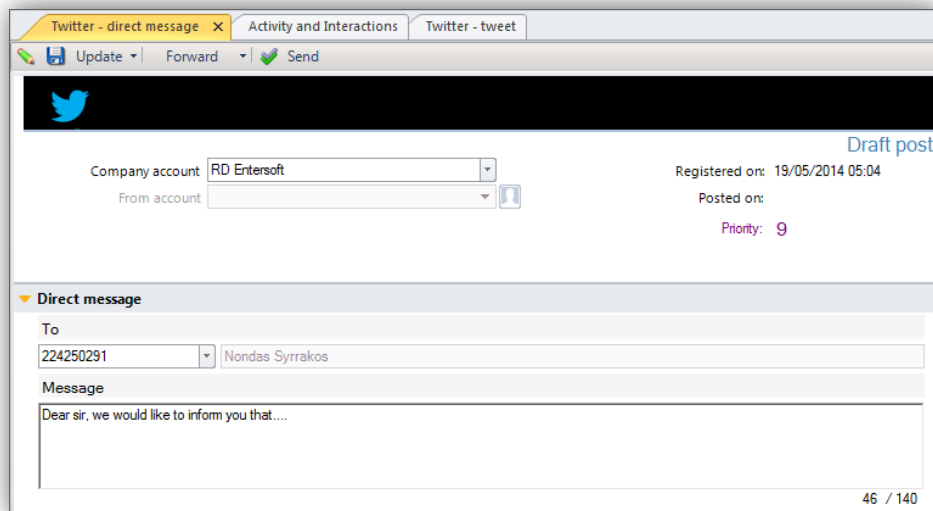


The screenshot shows a web browser window with the Facebook inbox interface. On the left, there's a sidebar with a 'Company account' dropdown, 'Username', and 'Evaluation' fields, and a list of conversations. The selected conversation is with 'Takis Dimitrakopoulos' (bebaia mporeis egw ekana thn brochure nwritera) dated 13/02/2013. On the right, the main area shows the conversation details, including messages from 'Takis Dimitrakopoulos' and 'Entersoft Social CRM' with timestamps and priorities.

Sending a direct message on Twitter

You can send direct messages to twitter users that have been registered to the Entersoft Social CRM, as shown in Image 42.

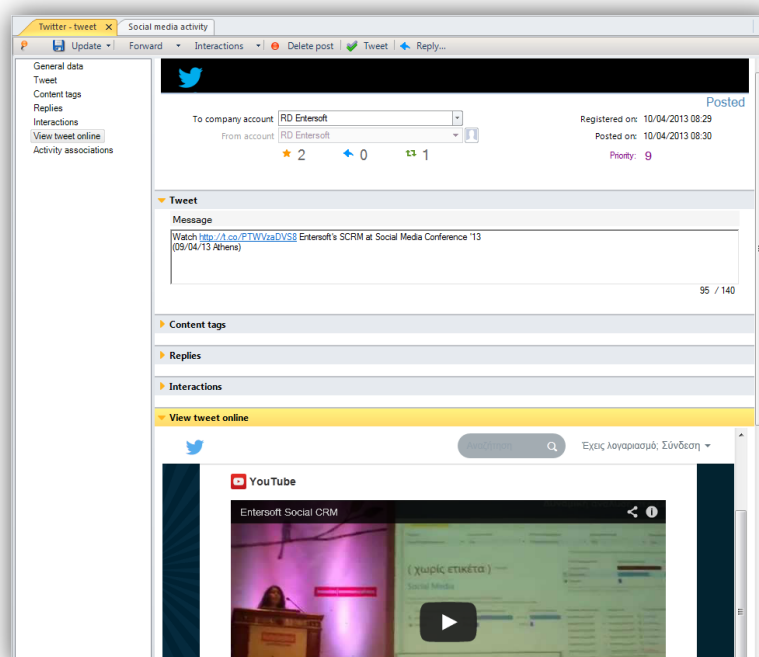
Image 42: Twitter | Direct message to a registered twitter account



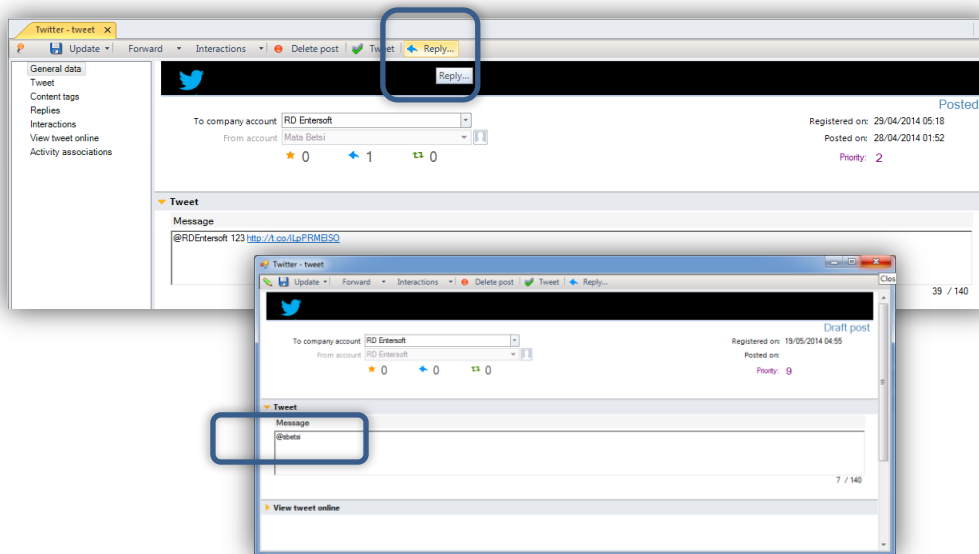
Tweet

Similarly to when tweeting on twitter, you may type a 140 characters long text and post it to your company twitter account (Image 43). You can mention and use twitter hashtags normally. If you use URLs in your tweet, these will be shortened automatically; therefore, (a) you do not need to shorten them in advance and (b) if the URL you are pasting is longer than a shortened URL (which is highly possible) you need to take into account that your actual tweet will be somewhat shorter.

Image 43: Tweeting about Entersoft Social CRM



You may also **reply to tweets** from your followers by simply clicking on the reply button on the UI form **toolbar** of a tweet, as shown in the following image.

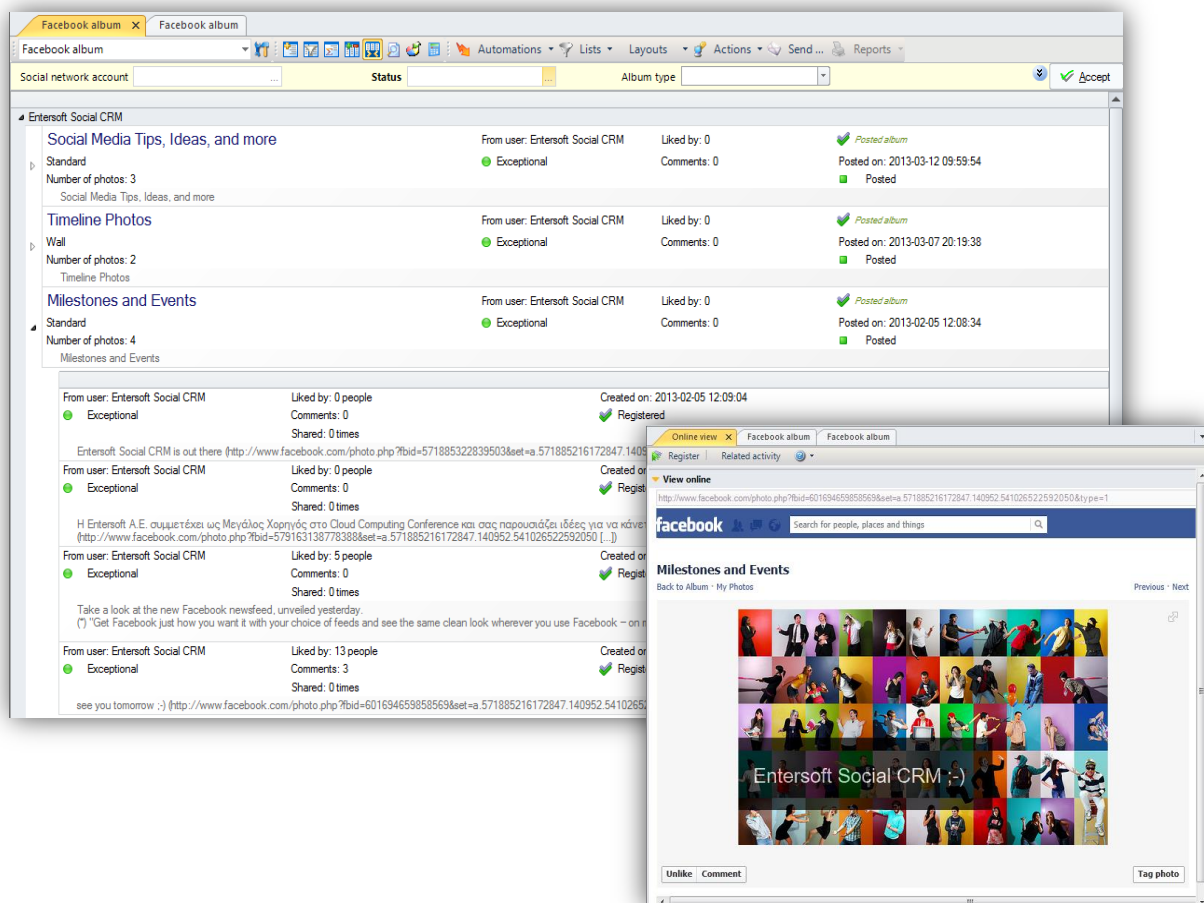


The application will automatically add a '@<username>' to the new tweet – reply you will post. You can also reply to tweets though the corresponding line action on **the Activity & Interactions** dashboard.

5. Facebook albums

Besides the standard posts, Entersoft Social CRM also supports **Facebook albums**. The administration of **facebook albums** is available at the **Social networking / Facebook Albums**. In this two-level list, the facebook albums are presented at the first level, grouped by Company Account, i.e. facebook page, and the second level includes the photos that each album contains (Image 44). In this context, the UI Form of the Photo is the online view of the post. You may access the standard post UI Form (described above in section: Posting a photo) by clicking on the button: **Related activity**.

Image 44: Facebook albums



Here, you may also **create a new standard facebook album**. This means that it is not possible to create cover, timeline, wall etc. albums using Entersoft Social CRM. Nevertheless, you may post photos in albums of these types routinely. In order to create a new album you simply need to define the facebook page (i.e. company account) and a name for it.

In the context of a specific facebook album (Image 45), you have access to information equivalent to other posts (i.e. a list of related interactions, comments, etc.). Additionally, there is a list of any draft photos which can be posted by using the context button: ** Post**.

Image 45: A facebook album | Posting related draft photos

Facebook - album X Facebook album

Update New Delete Interactions Post Comment...

facebook

To company account RD Entersoft

From account RD Entersoft

Registered on: 02/04/2013 10:59

Posted on: 26/06/2012 04:41

0 0 5

Album

Name
Timeline Photos

Album type
Wall

Content tags

Comments

Interactions

Posted photos

Photos not posted yet

Post

RD Entersoft

Liked by: 0 people
Comments: 0
Shared: 0 times

Registered since: 2013-04-11 11:4...
Photo
to album: [Timeline Photos]

Draft Post

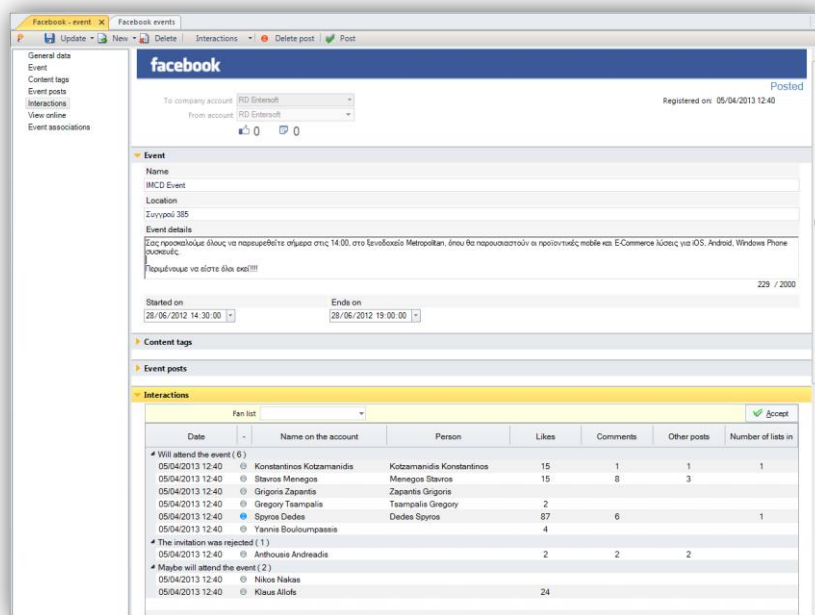
Page: 31 / 69

6. Facebook events

The administration of **facebook events** is available at the Social networking / Facebook Events. This two-level list, presents the events, at the first level, and the event posts, at the second level. Creating events is no longer supported outside Facebook, i.e. through third party applications.

In the context of facebook events, the interactions expander may include much richer information, as described in section: 7, next.

Image 46: An event and the list of responders



The screenshot displays the Facebook Events interface within a web browser. The left sidebar contains navigation links: General data, Event, Content tags, Event posts, Interactions, View online, and Event associations. The main content area shows the details of a Facebook event titled "IMCD Event". The event details include the location "Zurypool 385" and the event date "28/06/2012 14:30:00". Below the event details, there is a section for "Content tags" and "Event posts". The "Interactions" section is expanded, showing a list of responders. The list includes columns for Date, Name on the account, Person, Likes, Comments, Other posts, and Number of lists in. The responders are listed as follows:

Date	Name on the account	Person	Likes	Comments	Other posts	Number of lists in
05/04/2013 12:40	Konstantinos Kotzamanidis	Kotzamanidis Konstantinos	15	1	1	1
05/04/2013 12:40	Stavros Menegos	Menegos Stavros	15	8	3	
05/04/2013 12:40	Grigoris Zapantis	Zapantis Grigoris				
05/04/2013 12:40	Gregory Teampalis	Teampalis Gregory	2			
05/04/2013 12:40	Spyros Dedes	Dedes Spyros	87	6		1
05/04/2013 12:40	Yannis Bouloumpassias		4			
05/04/2013 12:40	Anthousis Andreadis		2	2	2	
05/04/2013 12:40	Nikos Nakas					
05/04/2013 12:40	Klaus Allots		24			

Note that...

Posting to Facebook events is not supported.

7. Interactions

You may also choose to manually download any interactions for a specific post, by clicking on the **Update interactions** menu. Moreover, you may schedule the interactions update for a specific post, by clicking on the **Scheduling** menu. In some cases, e.g. in case of events, this can be proven quite useful. When choosing to update activity interactions, the application downloads from the corresponding social network the user info of the fans/followers that interacted with a post. The related info is listed per post on the UI form, as presented in Image 47 and Image 48.

Image 47: Interactions - the corresponding expander on an Activity

Interactions							
Fan list							☒ Accept
Date	-	Name on the account	Person	Likes	Comments	Other posts	Number of lists in
Like (7)							
21/02/2013 15:25		Vlas Vlasious		10			
21/02/2013 15:25		Yannis Bouloumpassis		2			
20/02/2013 21:34		Michalis Moutzis		3			
20/02/2013 21:34		Takis Dimitrakopoulos		30	3		
20/02/2013 14:46		Mata Betsi		102	13	6	2
20/02/2013 14:46		Helen Pantormiou		48	10	2	1
20/02/2013 14:46		Noel Koutlis		2			

Image 48: Interactions - the corresponding expander on an Event

Interactions							
Fan list							☒ Accept
Date	-	Name on the account	Person	Likes	Comments	Other posts	Number of lists in
Like (2)							
20/02/2013 15:12		Haroula Danopoulou		4			
20/02/2013 15:12		Polyxeni Zacharouli		32	8	1	
Did not respond to the invitation (4)							
04/02/2013 16:00		Gregory Tsampalis		2			
04/02/2013 16:00		John Filippou		35	2		1
04/02/2013 16:00		Grigoris Zapantis					
04/02/2013 16:00		Haroula Danopoulou		4			
Will attend the event (5)							
20/02/2013 15:12		Stavros Menegos		14	8	3	
20/02/2013 15:12		Konstantinos Chatzigeorgiou					
20/02/2013 15:12		Spyros Dedes		72	5		1
20/02/2013 15:12		Konstantinos Kotzamanidis		12	1	1	
04/02/2013 16:00		Mata Betsi		102	13	6	2

Scheduling the automatic update of recent interactions

In order to schedule the automatic update of the interactions with all **recent** activity, i.e. any activity within the defined lifespan (see also the definition of: The average lifespan of a post, on page 6), the application provides a recent activity list, namely: "Update recent activity interactions (within lifespan)", and the corresponding automation. You may schedule the update by creating a new scheduled job in the list: Scheduled tasks", which is available under the Tools and Configuration / Schedule menu.

8. Contests

In general, marketers aim to broaden the audience of the facebook pages they manage in order to promote products and services most effectively. One of the most popular methods, widely used by social media marketers, for increasing the number of facebook page fans is running facebook contests.

Facebook contests are, generally, small-scale web sites accessible through a dedicated **page tab** and, therefore, contextually available within the facebook fan page.



Creating a contest on facebook | The role of facebook apps

A contest web site and a facebook fan page are associated through a facebook application that manages the obtainability and operation of the contest site within the facebook fan page. Specifically, through its apps, Facebook supports the creation of i-frames that allow the contest to be embedded within a specific facebook page.

So, in order to run a contest on a facebook page it is needed to:

(a) **Become a 'facebook verified developer'.**

And make sure that you have access to developers.facebook.com and that you are allowed to create new apps and so forth.

(b) **Create the contest web site.**

Make sure that you follow the specific facebook guidelines as regards its configuration and UI restrictions. Moreover, utilize the available facebook methods that will ensure a smooth and meaningful user experience. (developers.facebook.com/docs/guides/appcenter)

(c) **Create the facebook app.**

I.e. visit developers.facebook.com/apps and let facebook know about the contest, define the contest in the way that facebook 'understands' it. It is strongly recommended to extend the facebook application that you have used as the Connector between the SocialCRM and your Fan page (see section: 15, on page: 64), instead of creating a new app.

(d) **Associate the facebook app with your fan page.**

Make the contest app accessible from a specific fan page (developers.facebook.com/docs/appsonfacebook/pagetabs).

Further info is available on: developers.facebook.com. However, for focused info, support, contest templates etc. please, contact Entersoft directly.

When a facebook user participates in a facebook contest the following steps are, most commonly, followed:

- The user is required to "like" (i.e. become a fan of) the facebook page in order to participate
- The user is asked to grant some permissions to the contest application (most commonly these permissions include the user's public profile and email)
- Having granted the permissions, the user is typically asked to fill-in a form with personal info (e.g. name, email, gender, country of residence and so forth) or, even more so, answer a question or state a preference.
- The user is thanked for participating and (s)he is given the option to share the contest with his/her facebook friends.



Facebook contest admin tool

Entersoft may, additionally, provide the Facebook contest admin. This **extra, optional tool** is actually accessible through a custom URL and it aims to help marketers to create new contests within minutes, while ensuring that the technical issues and difficulties are handled by the tool itself.

The prerequisites are:

- Design (e.g. using Adobe Photoshop) a contest according to the specifications of the provided template.

- Declare the facebook app as described above (see: [Create the facebook app](#))

The tool is integrated with the Entersoft Social CRM and it allows you to:

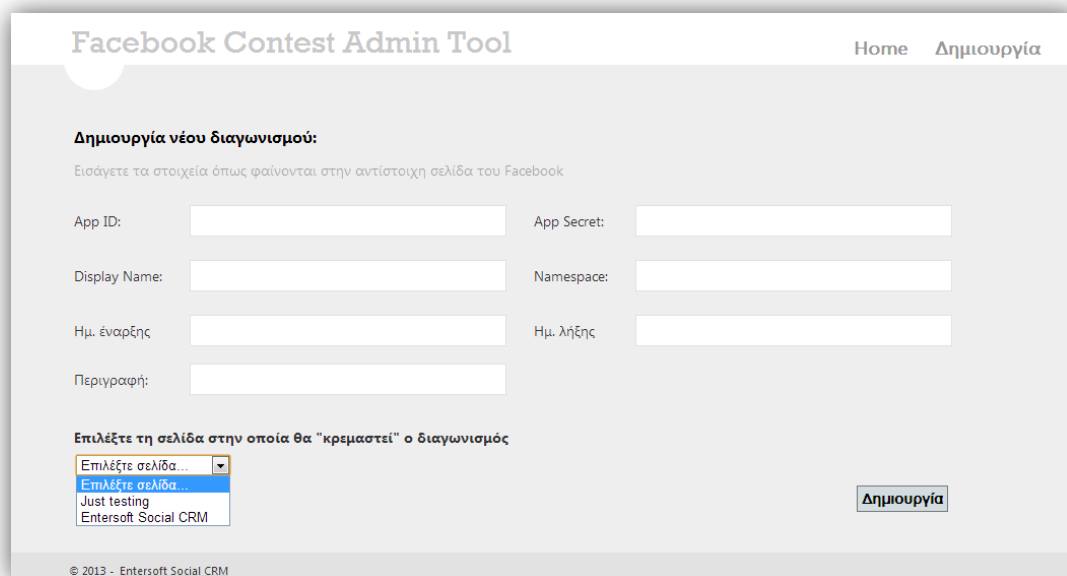
- Select the facebook page (among those you administer) you wish a contest to be associated with
- The user may select to create a new contest where (s)he may define the:
 - AppID,
 - the desired display name
 - the App secret and
 - the namespace

all as provided by Facebook.

- Moreover, the user can define the duration and a description for the contest.

These data (Facebook page, AppID, duration etc) the will be used by the Entersoft Social CRM in order to automatically create the Contest entry in the back-end (see: [Contests & Contest apps on Entersoft Social CRM](#)). The tool also associates the

Image 49: Facebook contest admin tool | | New Contest



The screenshot shows the 'Facebook Contest Admin Tool' interface. At the top, there are links for 'Home' and 'Δημιουργία'. The main heading is 'Δημιουργία νέου διαγωνισμού:'. Below this, a subtitle reads 'Εισάγετε τα στοιχεία όπως φαίνονται στην αντίστοιχη σελίδα του Facebook'. The form contains several input fields: 'App ID:', 'App Secret:', 'Display Name:', 'Namespace:', 'Ημ. έναρξης', 'Ημ. λήξης', and 'Περιγραφή:'. Below these fields, there is a section titled 'Επιλέξτε τη σελίδα στην οποία θα "κρεμαστεί" ο διαγωνισμός' with a dropdown menu. The dropdown menu is open, showing options: 'Επιλέξτε σελίδα...', 'Επιλέξτε σελίδα...', 'Just testing', and 'Entersoft Social CRM'. A 'Δημιουργία' button is located at the bottom right of the form. The footer of the page reads '© 2013 - Entersoft Social CRM'.

The tool allows you:

- to review the list of contests that are currently active on this particular page or still in a drafts state and so forth
- and, assuming that you have created a new contest, to edit and adjust its setting by selecting the contest for editing.

These are the auto-completion of the facebook user's email, the uploading of the Terms of Use and the uploading of the contest background and control (e.g. buttons, fields) images.

Image 50: Facebook contest admin tool | Contest settings

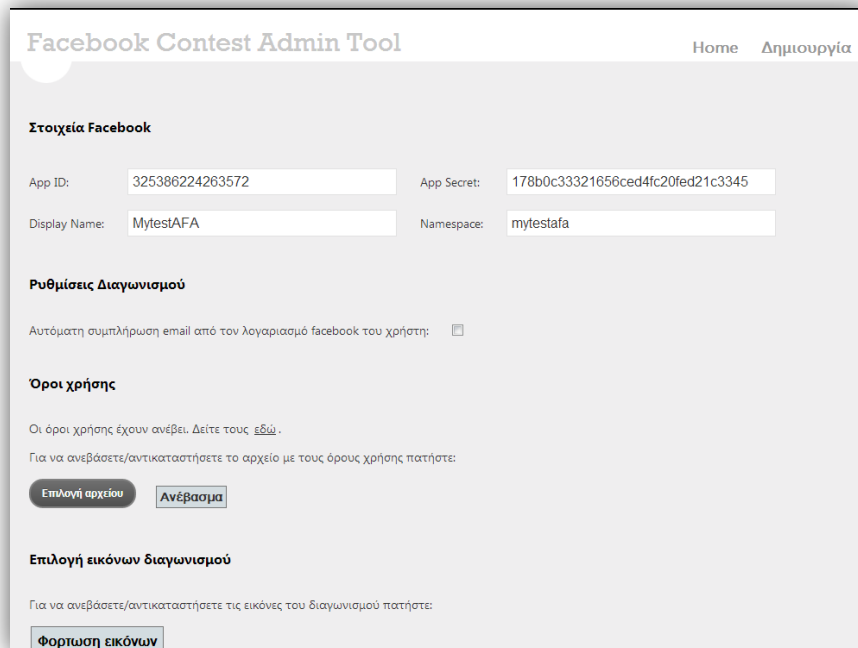
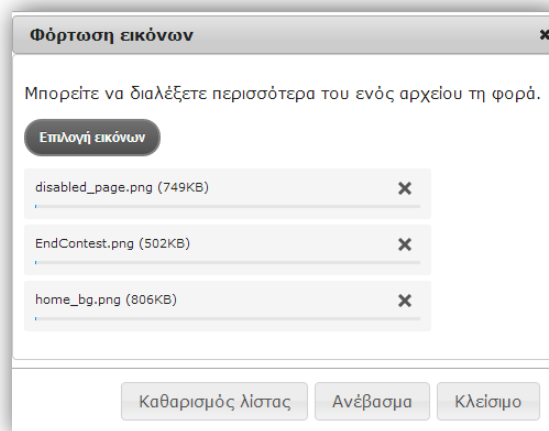


Image 51: Facebook contest admin tool | Uploading image files



Contests & Contest apps on Entersoft Social CRM

Assuming that you have created the contest and associated to your fan page, the question that arises is: where is or should all this info about participants be stored and how can it be monitored, analyzed, utilized etc? Entersoft SocialCRM may provide a comprehensive answer to the above.

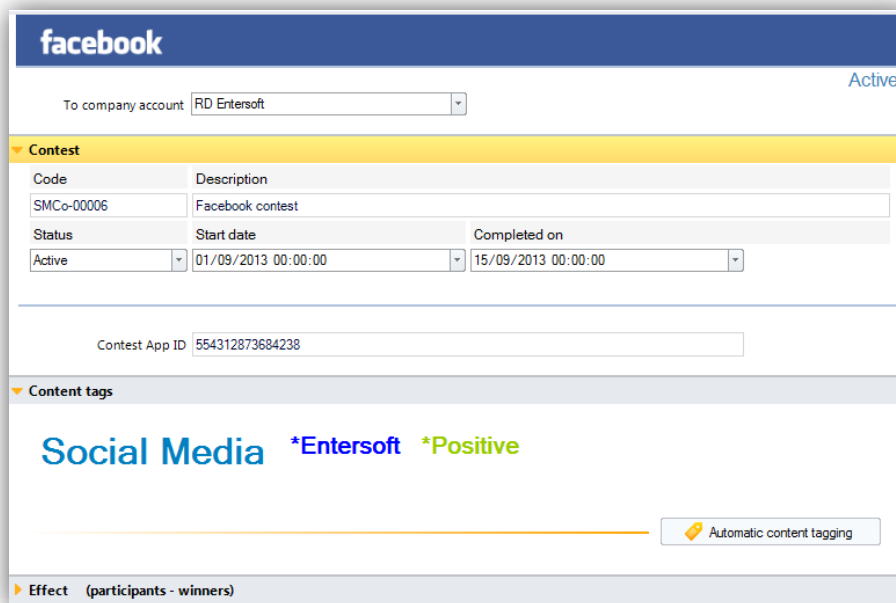
In order to define a contest in Entersoft SocialCRM, go to **Social Networking / Facebook contests**. There you may create a new contest (e.g. Image 52, if you have not used the Entersoft facebook contest admin tool), i.e.

- Define the Fan page (company account) it concerns.
- Provide a description for the contest.
- Update the contest status (i.e. whether the contest is currently active, completed, cancelled and so forth).

- Set the period of time during which the contest will be active for fans to participate in.

The information related to the contest status and the period it's active **can** and **should be** used by the Contest web site in order to ensure that the contest will be completed automatically when live. The default Entersoft Social CRM solution requires that the contest is Active within the specified period of time for a user to be able to participate. You may also define content tags (see section 11), similarly to all other social media activity, as shown in Image 52.

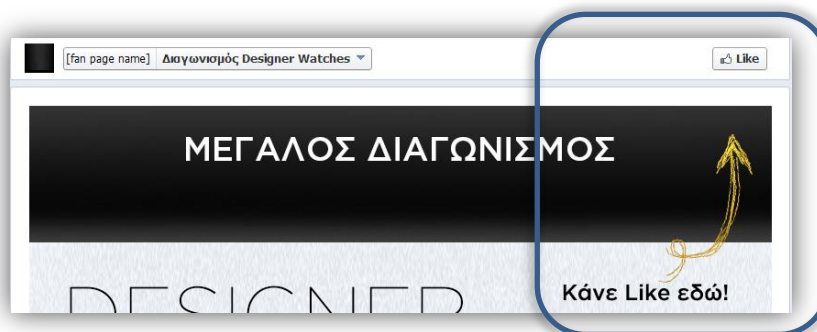
Image 52: A contest's definition in Entersoft Social CRM



Contest web site templates can be provided by Entersoft upon request. By default, these templates include the following steps:

- **Step 1** | If the user is not a fan, then (s)he is asked to like the page before proceeding (Image 53). If the user is already a fan, then this step is skipped.

Image 53: Entersoft Facebook contest template | Step 1



Step 2 | The user is informed about the prizes, the contest duration and terms of use and a call of action (e.g. Participate now!) becomes available (Image 54). If the user clicks on the participation button, (s)he is asked to grant permission to the contest facebook app. As aforementioned, the requested permissions depend on the info you wish to collect; nevertheless, public info is the minimum mandatory permission that can be requested (Image 52). If the user has previously granted access to the specific facebook app, this pop-up dialogue is of course skipped. At this point, the web site uses the info stored in the Entersoft SocialCRM

to check⁴ whether the user has already participated in the specific contest. If the user has previously participated then the site will skip the third step and will move on to the last step. Each user is allowed to participate in a contest only once.

Image 54: Entersoft Facebook contest template | Step 2

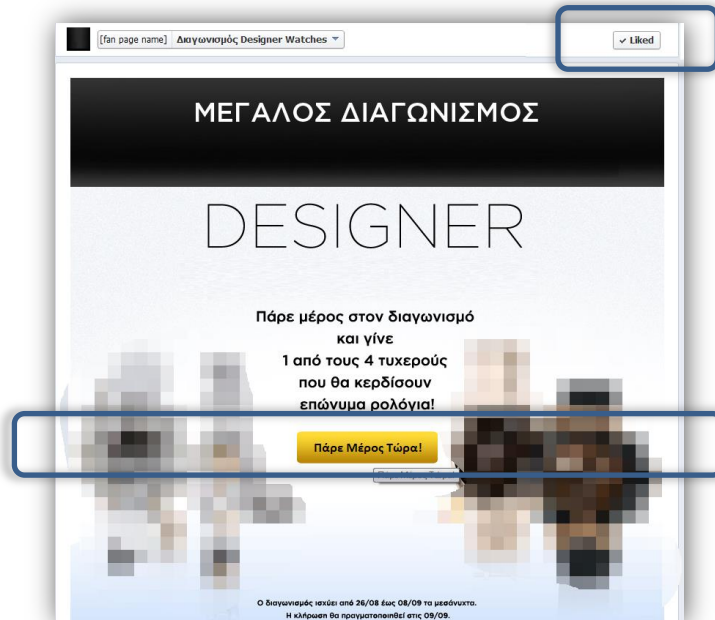
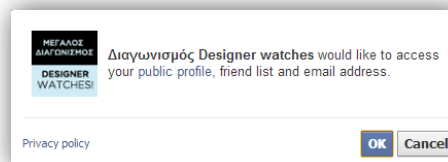
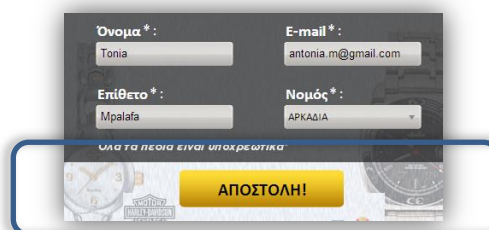


Image 55: Request for granting permissions | Step 2



- **Step 3** | Here, the user is asked to fill-in the form. The default fields are: first & last name, email and district⁵; all of them are by default mandatory and the validity of the email format is checked.

Image 56: Entersoft Facebook contest template | Step 3



⁴  **ESTMSMContestParticipants**: This view (scroller) returns whether a user has already participated or not in a specific contest. The scroller dictates the use of the application ID and optionally the user account ID. When only the AppID is provided to this view, the view can be alternatively used for the web site to acquire the contest end date (in UTC time)

⁵  As regards the available templates, the list of districts depends on the data returned by the view: **ESGOZDistrictGR**. This view filters any Greek districts available in the Entersoft SocialCRM DB.

When the user selects "SEND", the information filled-in by the user and the information provided by Facebook (depending on the granted permissions) is stored in the Entersoft SocialCRM database (see next section, below).

- **Step 4** | At the final step the participant is given the option to invite his/her friends.

Image 57: Entersoft Facebook contest template | Step 4

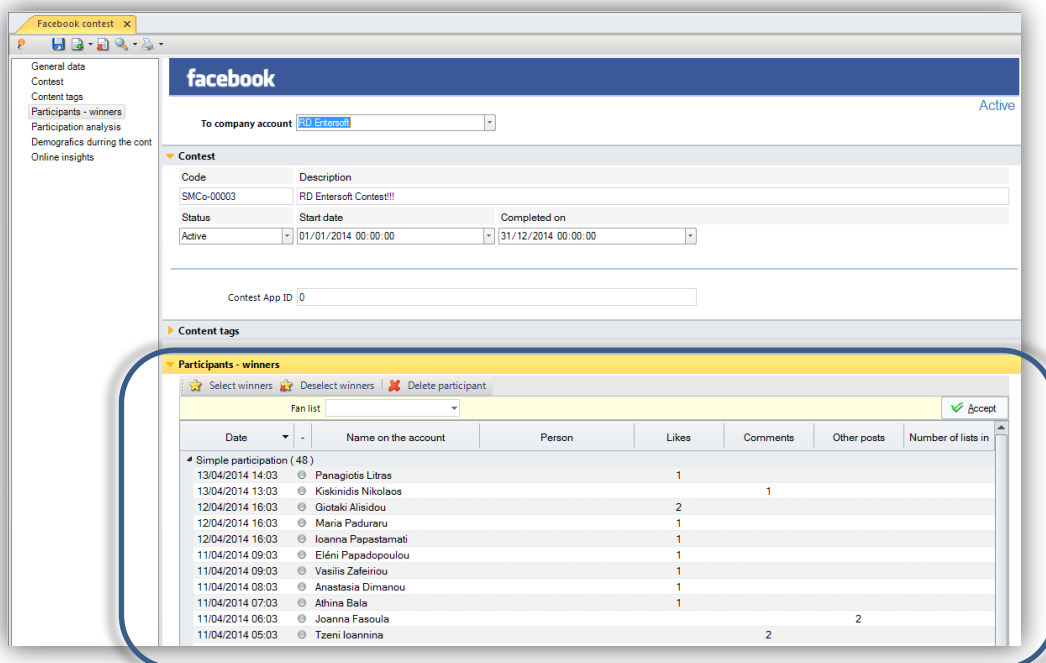


Live contest monitoring, participants and winners

The minute a page fan takes part in the contest, the participation is recorded in the Entersoft Social CRM as a **Contest effect**, allowing you to monitor **real-time** the contest participations. This can be achieved through:

- The **context list** on the Contest form (Image 58), where the contest interactions (effects) are listed (see also section 7). Here, you may also select the contest winners (★ **Select winners**) and undo this action (✗ **Deselect winners**), if needed. You also have the option to **delete a participation** if required.

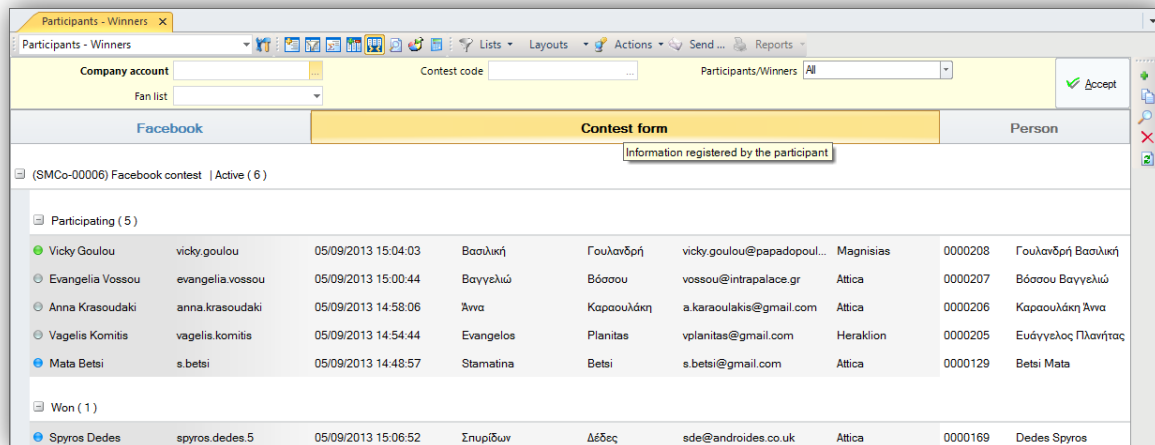
Image 58: Contest form: the context list of the participants



Date	Name on the account	Person	Likes	Comments	Other posts	Number of lists in
13/04/2014 14:03	Panagiotis Litras		1			
13/04/2014 13:03	Kiknidis Nikolaos			1		
12/04/2014 16:03	Giotaki Alisidou		2			
12/04/2014 16:03	Maria Paduraru		1			
12/04/2014 16:03	Ioanna Papastamati		1			
11/04/2014 09:03	Eléni Papadopoulou		1			
11/04/2014 09:03	Vasilis Zafeiriou		1			
11/04/2014 08:03	Anastasia Dimanou		1			
11/04/2014 07:03	Athina Bala		1			
11/04/2014 06:03	Joanna Fasoule				2	
11/04/2014 05:03	Tzeni Ioannina			2		

- The **Participants - Winners list** (Image 59), where the form data are also listed (menu: Social Networking / Facebook contests). This list comprises of three parts: (1) Information from the participant's facebook account; (2) Information registered by the participant on the contest form; (3) Basic info on the associated Person.

Image 59: Participants-Winners list



Facebook		Contest form						Person	
Information registered by the participant									
(SMCo-00006) Facebook contest Active (6)									
Participating (5)									
	Vicky Goulou	vicky.goulou	05/09/2013 15:04:03	Βασίλη	Γουλανδρή	vicky.goulou@papadopoul...	Magnisias	0000208	Γουλανδρή Βασίλη
	Evangelia Vossou	evangelia.vossou	05/09/2013 15:00:44	Βαγγελιώ	Βόσσου	vossou@intrapalace.gr	Attica	0000207	Βόσσου Βαγγελιώ
	Anna Krasoudaki	anna.krasoudaki	05/09/2013 14:58:06	Άννα	Καραουλάκη	a.karaoulakis@gmail.com	Attica	0000206	Καραουλάκη Άννα
	Vagelis Kornitis	vagelis.kornitis	05/09/2013 14:54:44	Ευangelos	Planitas	vplanitas@gmail.com	Heraklion	0000205	Ευangelos Πλανήτας
	Mata Betsi	s.betsi	05/09/2013 14:48:57	Stamatina	Betsi	s.betsi@gmail.com	Attica	0000129	Betsi Mata
Won (1)									
	Spyros Dedes	spyros.dedes.5	05/09/2013 15:06:52	Σπυρίδων	Δέδες	sde@androides.co.uk	Attica	0000169	Dedes Spyros

The lists display information that the contest site collects. Specifically:

Form data | The default fields on the form are: (i) Name; (ii) Last Name; (iii) Email; (iv) District.

Task Type: Contest

The default contest form fields are defined on the Task Type with International Code: "ES.SMCo" as User Defined Fields of the ESTMTaskItem table.

Facebook data | The facebook user account fields that can be stored on the "Social Media Account" Entity are: (i) User ID, (ii) Username, (iii) Name, (iv) email address, (v) gender, (vi) birthday, (vii) age group⁶, (viii) language (locale), and (ix) country (see also: Section 3; Image 8).

Contest app permissions

Note that the above depend on the default facebook app permissions (Public Profile and Friend List⁷) while the email address and the birthday require special permissions⁸.

Person data | Based on the email address provided on the contest form, the application attempts to identify an existing Person and associate it to the facebook account – participant. If this search does not return any results then the application creates a new Person for the participant, using the data provided by the user on the contest form.

Note that there is an action available for the **bulk update of the public profile of contest participants** (menu: Social networking / Participants – Winners / Get profile of all participants and context on the particular scroller). The action is available to administrators only and the system will ask the user to confirm its intention for the execution of the above action before proceeding.

Similarly to all other interactions with a facebook fan page, the interactions with a Contest (i.e. participations) can be viewed:

- Per user account (Image 60)
- In the context of the overall social activity analysis (Image 61)

⁶ Possible age ranges are 13-17, 18-20, and 21+.

⁷ See: developers.facebook.com/docs/public-profile-and-friend-list

⁸ See: developers.facebook.com/docs/user/ and note that your use of email must comply both with [Facebook policies](#) and with the [CAN-SPAM Act](#) (developers.facebook.com/docs/can-spam-act/)

- In the Interactors list (see: Participations; Image 14)

Image 60: Participations in facebook contests per facebook user

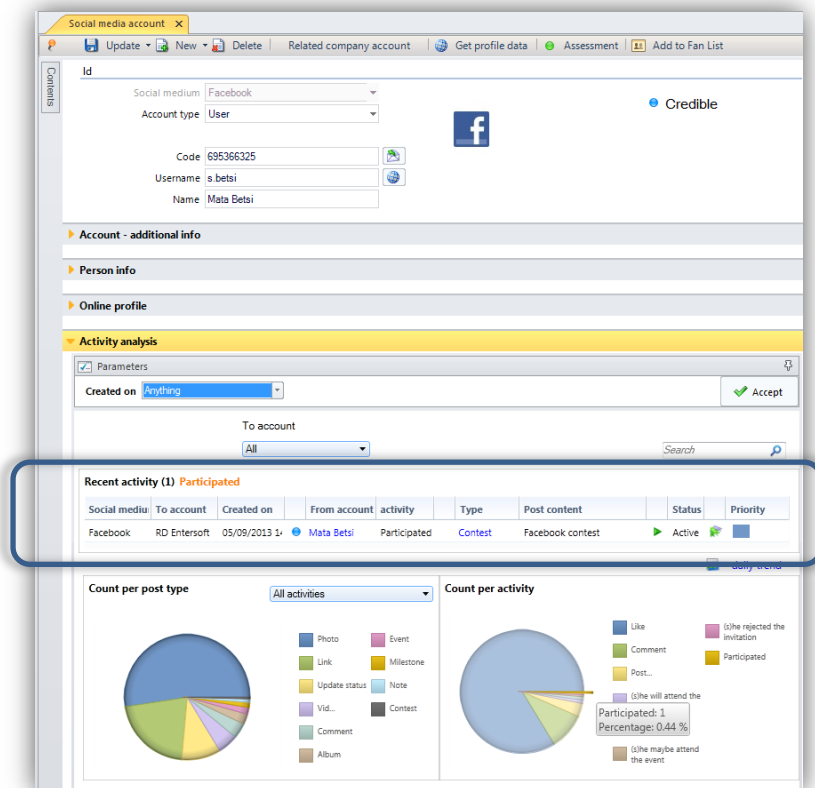
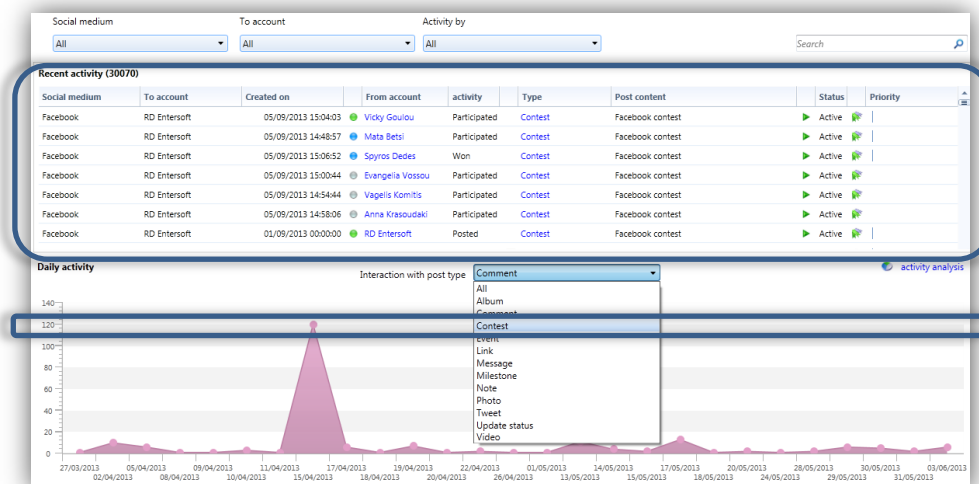


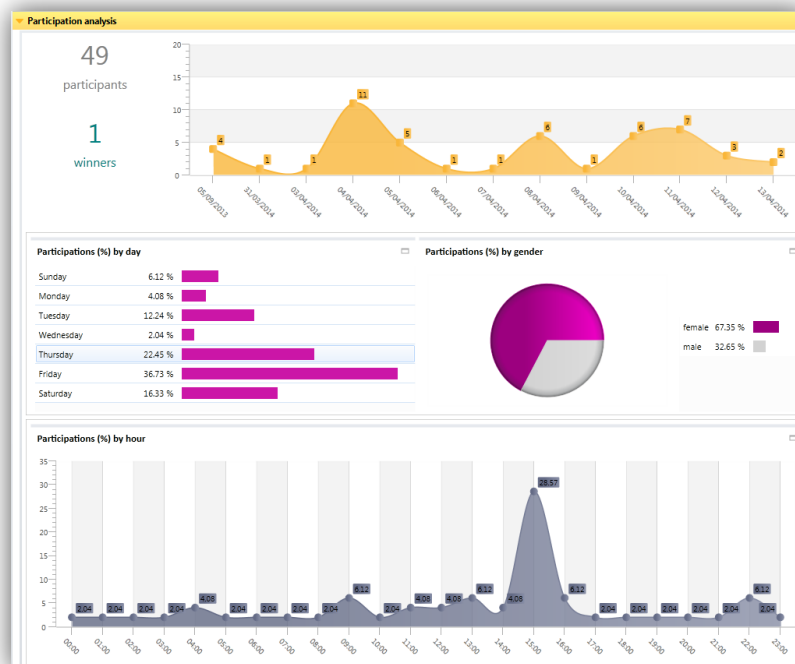
Image 61: Activity analysis: Participation progress within a selected period of time



Contest insights

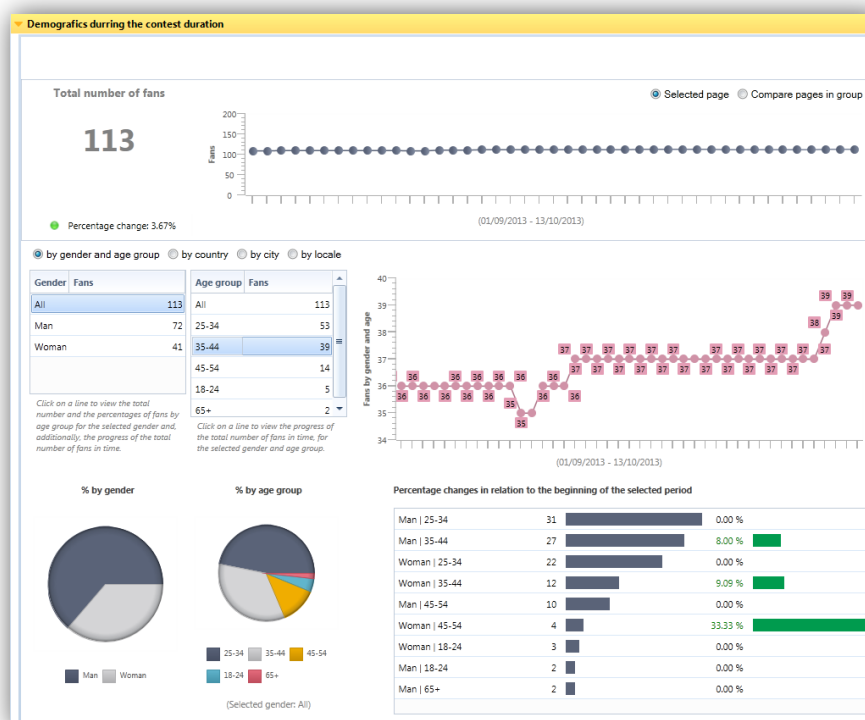
This context dashboard **"Participation analysis"** presents information about the number of participants and winners, their distribution during the contest, the participant's gender percentages, the most active days and hours

Image 62: Participation analysis



Moreover, the “Page demographics” dashboard (go to page 59, for further info on the particular dashboard) is available in the contest context. As presented in Image 63, this allows the Entersoft Social CRM user to examine the fan base growth during the contest. Even though it is generally not expected that the fan base growth during a contest will totally depend on the participations, these insights can provide an approximate overview of the contest results.

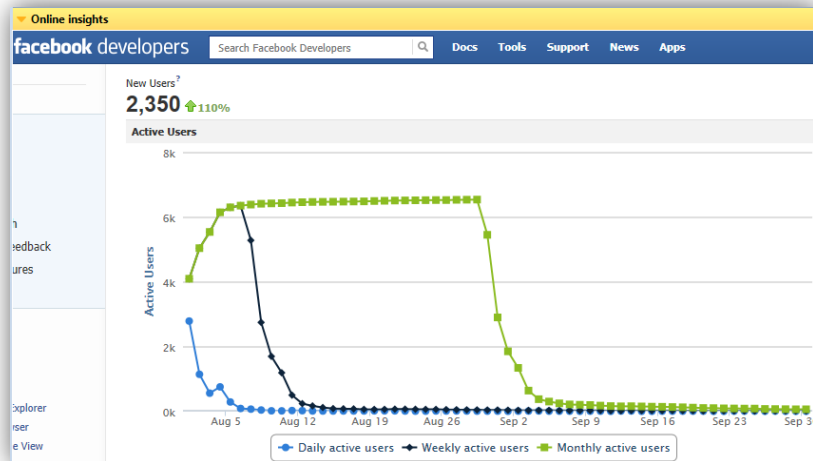
Image 63: Demographics during a contest



Contest specific insights

The online application insights are available through the corresponding context scroller. However, note that the login user must be registered as a "Facebook developer". Nevertheless, the contest application administrator can provide the management with specific app insights.

Image 64: Online contest application insights



9. Social media activity as a Starting Point

Each post may act as a **starting point** for a complaint, a knowledge base article, or a service case.

From social activity to CRM Tasks: Medium / Origin

The medium / origin of the generated complaints / KBs / Service Cases is set as "Social Media"

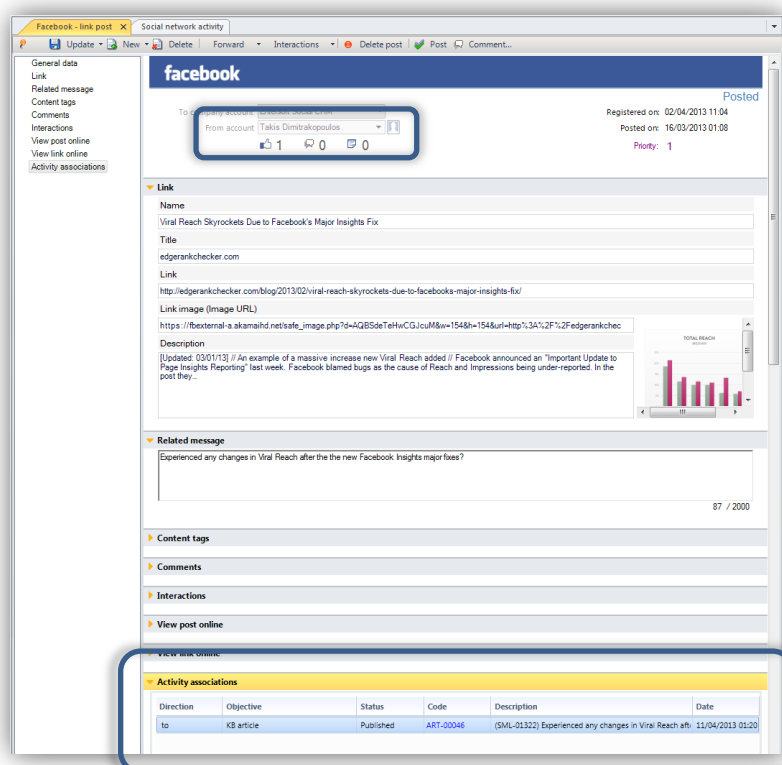
Create CRM Tasks from social activity when meaningful

The application performs a series of checks to ensure that it is actually meaningful to generate complaints, service cases, and KBs from social media activity. Specifically:

- The user that created the post must be other than the Company Account User – Page, to whom it was posted to. In case of KBs, the check is simply a warning.
- When creating a Service Case, the system also checks whether the Social Media Company Account, where to the service request was posted, is officially monitored as Service Account by the system (see section: 15 , Image 94) and returns a warning if not.

The **associations** between social activity tasks and standard CRM tasks are accessible from the "**activity associations**" expander on every social activity.

Image 65: Activity associations of a Facebook link post



Direction	Objective	Status	Code	Description	Date
to	KB article	Published	ART-00046	(SML-01322) Experienced any changes in Viral Reach after the new Facebook Insights major fixes?	11/04/2013 02:20

By clicking on the hyperlink available in the column "Code", you may **directly access the associated activity**. E.g. when clicking on the code of the associated KB Article shown in Image 65, the UI form of the KB opens as shown in Image 66 and vice versa.

Image 66: Social activity associations of a KB article

KB article: Dimitrakopoulos Takis

Save New Delete Social networking Automations Actions

General data

Classification

Subject (SML-01322) Experienced any changes in Viral Reach after the t

Status Published

Article category Social Media

Keys

Audit trail

Created on 11/04/2013

Last modified on / /

Created by ESDEV

Last modified by

Notes

Items

Attachments

Social activity associations

Can be posted to (medium): Social Media

Direction	Objective	Status	Code	Description	Date
from	Facebook - link post	Posted	SML-01322	[Updated: 03/01/13] // An example of a massive increase new	16/03/2013 01:08

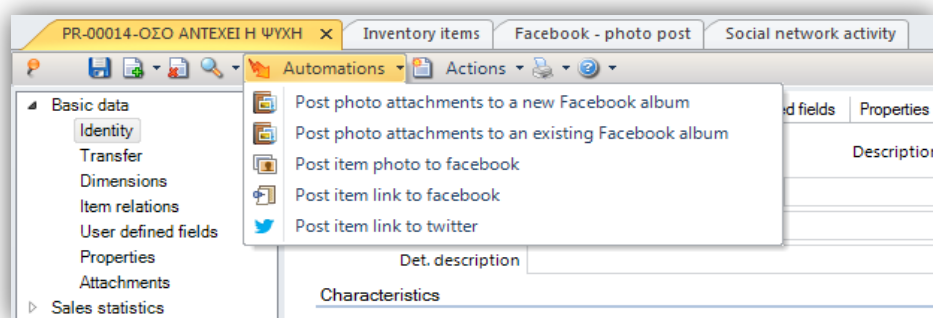
10. Creating social media activity from existing content

A series of **ERP and CRM entities** can be used to **generate social activity**. This version supports the generation of social activity from Inventory Items, Knowledge base articles, and Events.

...from Inventory Items

As regards **Inventory Items**, a number of actions allow you to easily **reuse** the existing content and post it to your Facebook page or your Twitter account.

Image 67: Generating social activity from Stock Items



The URL of an Inventory Item

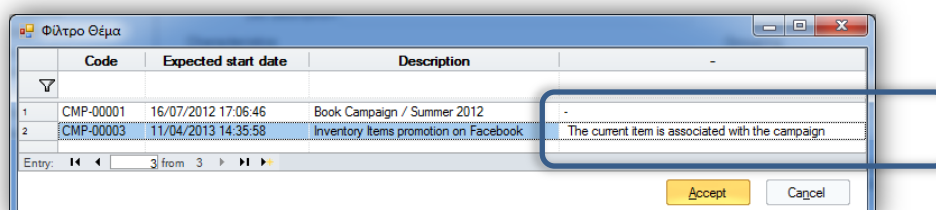
Two new eCommerce Company Parameters (Image 68) can be used to define the structure of the product URL at your eCommerce site, supporting thus the direct posting of the URL of a specific item to your fan page or your Twitter account; therefore, the efforts to actively direct your fans and followers to your web site are significantly facilitated.

Image 68: Company Parameters | URL Structure

CATEGORY: E-Commerce Parameters			
53	URL dynamic part (for Items)	Vertical	{ItemFamilyCode}/{Description}
54	URL fixed part (protocol και domain name)	Vertical	http://www.entersoft.gr/

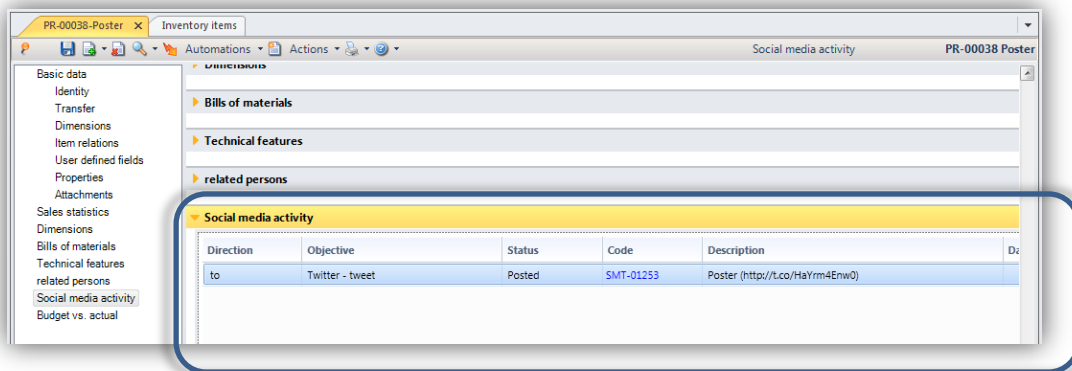
Moreover, you may optionally define the **Marketing Campaign** under which this post is created. In case the current item has been associated with the Campaign, a special column in the investigation list will inform the user in order to support him or her in selecting the proper campaign.

Image 69: Selecting marketing campaign



The associated social media activity can be reviewed and accessed from the corresponding expander, as presented in Image 70.

Image 70: Item related social media activity



...from KB Articles

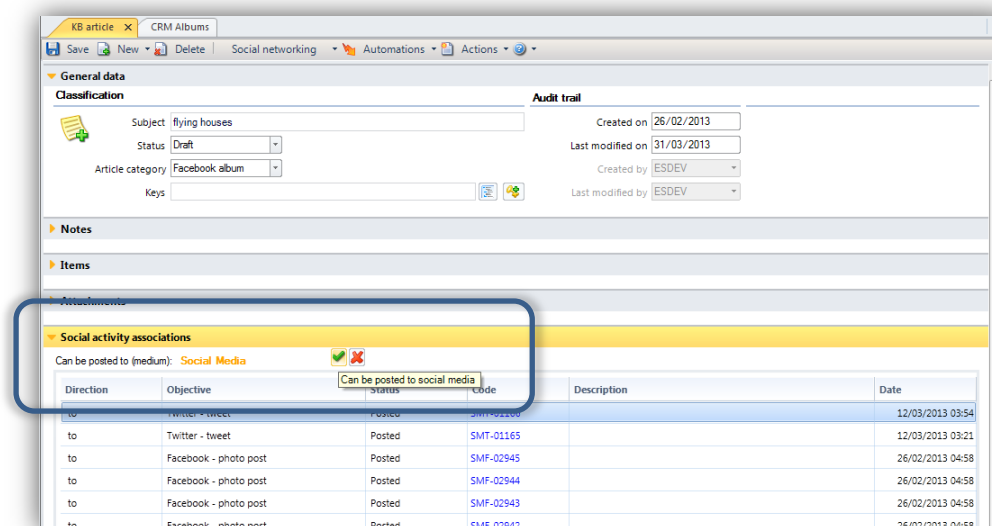
You can create social media activity (tweets and facebook status updates) starting from a KB article as long as it has been defined that the specific KB article can be posted to Social media. This can be done by defining the Social Media as the article's medium. To **activate the Social media as the article's medium**, you need to click on the  button that is available in the Social media activity expander. Click on the  button to declare that the article cannot be posted to social media.

Similarly to when creating posts or tweets from an Inventory Item, you may optionally define the **Marketing Campaign** under which this post is created.

If you use a custom UI form...

...and the new expander is not automatically available to you, then the two actions described above (i.e. can / cannot be posted to Social media) will be available under the Automations menu on the KB Article toolbar.

Image 71: A KB article that can be posted to Social media

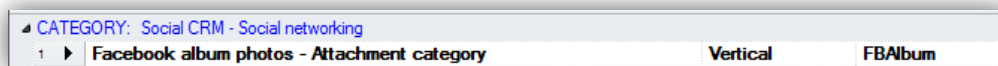


Facebook albums can also be easily generated from knowledge base articles of the corresponding category (category: KB Article / Category value: ES.Facebook_album). Any KB that has been categorized as facebook album and that can be posted to social media, becomes available in the Albums list (menu: Social networking / Albums). Note that a KB must not necessarily be categorized as facebook album in order to post it as such; the system will warn you if you try to post a KB of some other category

as an album but it will not stop you. Nevertheless, only the KBs that have been explicitly categorized as facebook albums will be included in the Album list.

The KB article image attachments that are of a specific category (any existing attachment category or a new one; see: Image 72) are to be posted as photos in an album. You may choose to post the photos in an existing or a new album. Also, you may optionally define the **Marketing Campaign** under which an album is created.

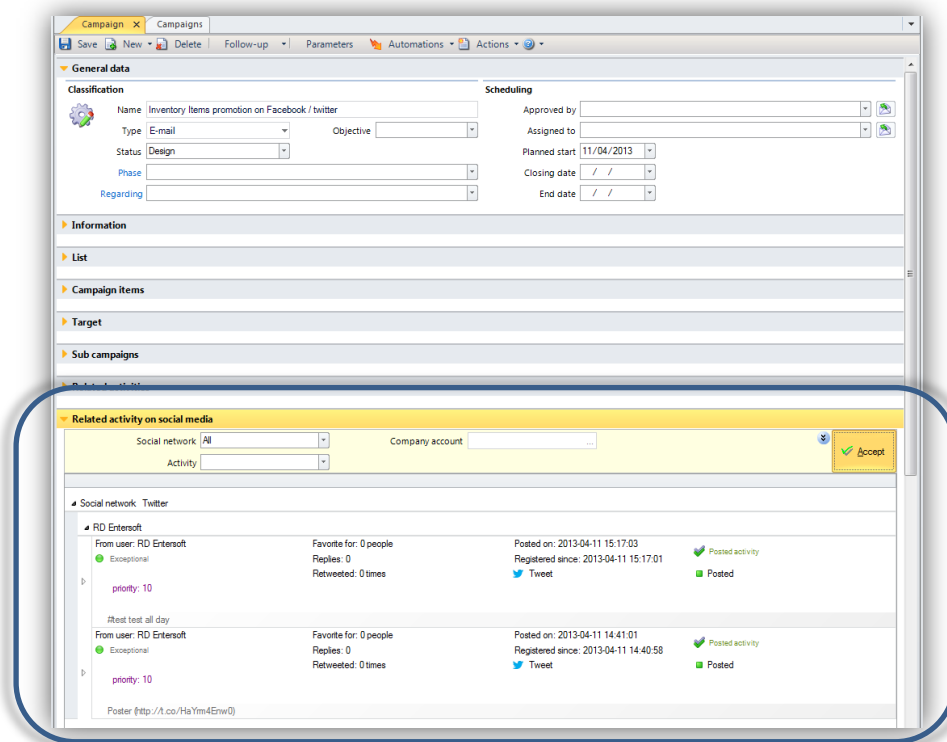
Image 72: Company parameters: Defining the attachment category for Facebook album photos




Campaigns and related activity on Social Media

Having created facebook posts or tweets in the context of a Campaign, you can review these through the corresponding expander on the Campaign UI Form (Image 73).

Image 73: Marketing campaign | Related activity on Social Meida



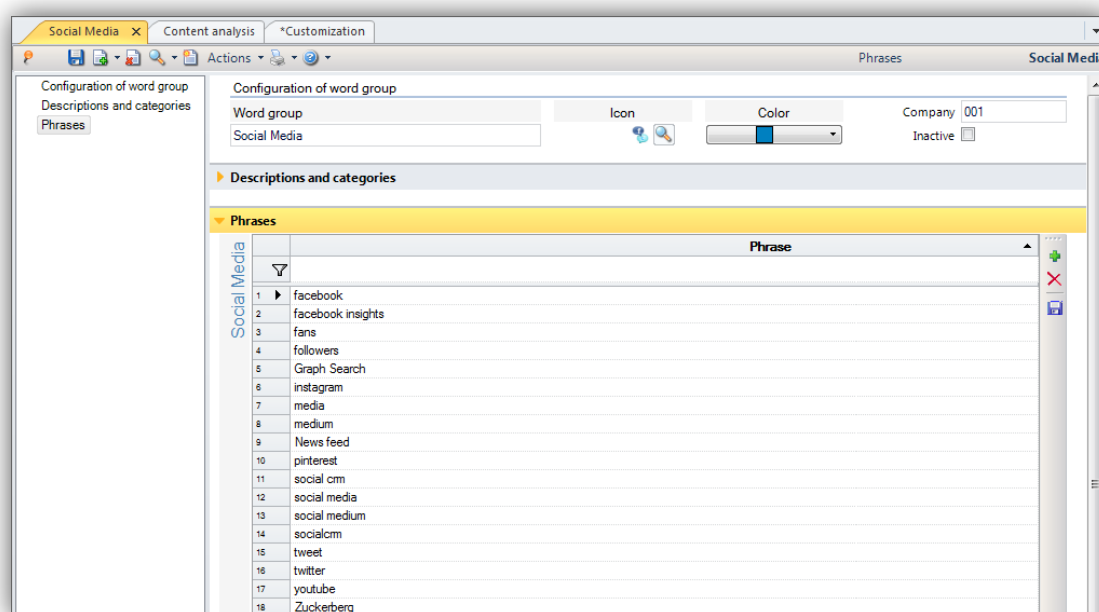
11. Content tags

All types of posts have a special expander called **Content tags**: this expander introduces a special functionality that allows you to assign **tags** that describe the content of each post i.e. **Content tags**.

In order to utilize the tagging functionality you need to go to Tools and Configuration / Customization / Organization parameters / Entities – content tags / Word groups. There you may define several **word groups** i.e. groups of **words or phrases that convey or describe the same or a similar concept**. The **name** of the word group summarizes, in a way, these distinct words and phrases. For example, one may create a word group called “Social Media”. This word group may include numerous words and phrases related to Social media, such as: facebook, twitter, youtube, post, fan etc. (e.g. Image 74).

Besides the explicit words and phrases that may be defined, in a declarative manner, in the context of a word group, you may also select a **color** and an **icon** that describe best the word group. Optionally, you can provide a description and an alternative description for the word groups you create. Moreover, you may assign a word group multiple categories (define them: Tools and Configuration / Customization / Organization parameters / Entities – content tags / Word group – Categories and then assign them by using the  button at the **Description and categories expander**).

Image 74: A group of words



Empty word groups

A word group does not necessarily include words and phrases and some implementation purposes may necessitate that you create or advice the creation of empty word groups.

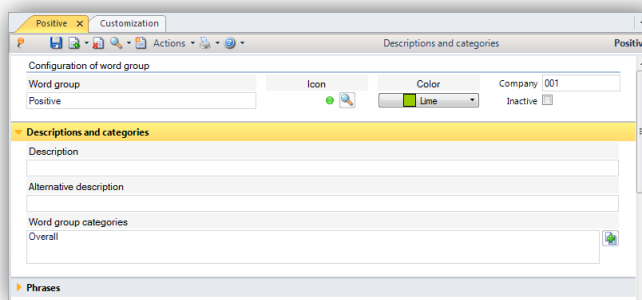
For example, you may choose to create some word groups that will be intended to provide an overall assessment of a post, e.g. positive, negative and so forth. Such an empty word group is presented in Image 75. In this example, the word group “positive” has been also categorized as “Overall” in order to allow us to focus on this and other similar word groups when analyzing the data later.

Empty word groups cannot be automatically assigned as tags to posts; these are intended exclusively for manual tagging. Note that the instance of a word group on a post and its attributes (i.e. whether it's added by user and the number of occurrences) is what's called a content tag.

Note that...

The name of the word group is not used by the system when performing the automated tagging; therefore, in several cases you may need to consider including the name of the word tag as a word/phrase; as in the case of the "Social Media" word group, demonstrated in Image 48.

Image 75: Utilization of empty word groups



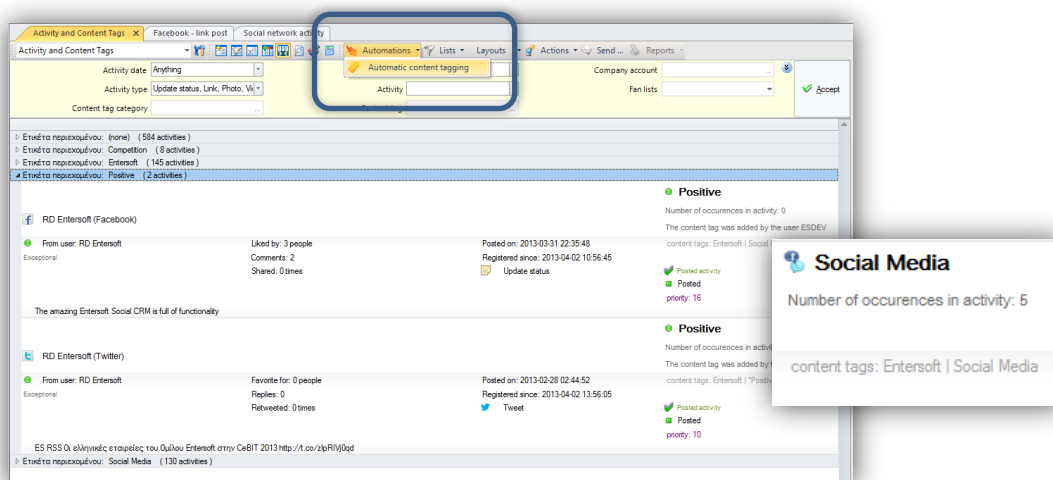
Having defined the word groups you can now use them to tag the content of the posts on your accounts. Note that any posts downloaded or created after the configuration of the word groups will be **automatically processed and tagged**. To ensure that the automatic tagging is applied to the posts you have already downloaded or posted, go to: **Social networking / Activity & Content tags**, select the posts you prefer, and execute the **bulk, automated content tagging** action, as shown in Image 76. You may also wish to execute the bulk content tagging after having reorganized your word groups and the words/phrases in them.

Note that...

Only textual data are automatically analyzed and tagged.

The **Activity & Content** list presents the posts on your accounts organized by Content tag. It is highly probable that a post has more than one content tags; in the case of such posts it is anticipated that these will appear more than once in the particular list depending on the number of their distinct tags. The list also includes info about the tags in total that have been assigned to a post, the occurrences of the tag in the activity content, and the user that added the tag, when manually added.

Image 76: Activity & Content tags | Automatic content tagging of existing posts



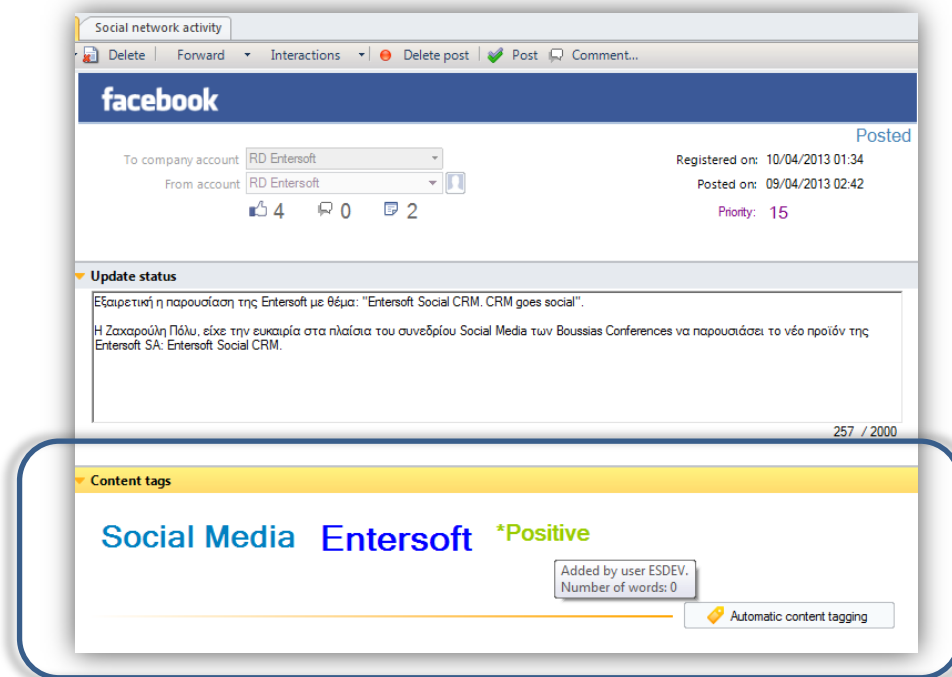
The number of occurrences denotes how many times the system manages to identify one or more words/phrases of the word group in a specific post. Manually added tags are marked with an **asterisk**.

This information is also available at the **Content tags** expander of the various UI forms of all sorts of social media activities. Specifically, the **tag cloud** control, that is available on all social media activities, uses the **size of the tag** to indicate the number of the occurrences (the specific number of occurrences is available as a tooltip), and the **asterisk** to denote that the tag was manually added (the specific user is available as a tooltip); finally, the content tag **color** is the color defined on the corresponding word group.

To manually tag a post, select **"Insert"** on the right click menu, on the tag cloud control. You may **delete** a content tag, using the corresponding right click menu entry. More importantly, you may **access its definition** and dynamically review (i.e. add, delete, or merely confirm) the words/phrases in the word group.

The **automated content tagging** action is here available too: this will recalculate any tags that have been added automatically (update the number of occurrences, maybe delete a tag or add another and so on). On the other hand, no manually added tags will be deleted. If the recalculation of tags results that the manually added tags can also be added automatically, then the system will simply update their occurrences. Note that when a user manually tags a post, the occurrences of this tag are, initially, zero.

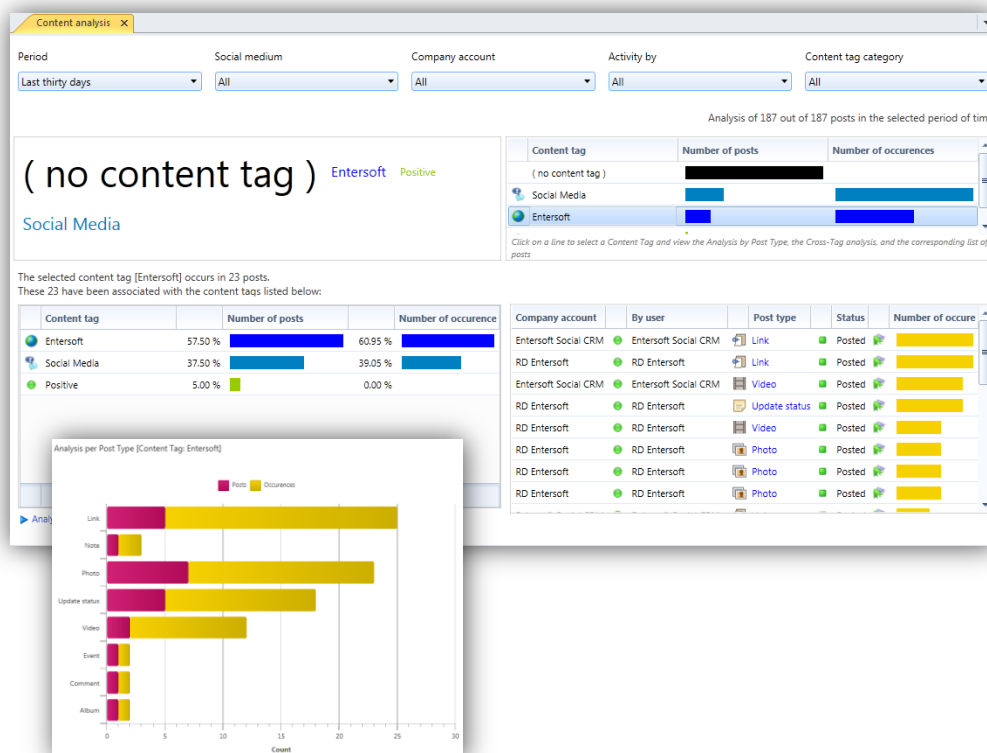
Image 77: Content tags on a facebook post



12. Content analysis

The content tag related information can be used for various purposes such as sentiment analysis, crisis management, content-based monitoring etc. For these to be done efficiently and effectively, the **content analysis** interactive dashboard (Image 78) is available under the **Social Networking** menu. The overview of the content analysis is presented in the form of a **summarizing tag cloud**. The specific dashboard allows you, among, others, to **focus on a specific category of content tags**.

Image 78: Content Analysis (Interactive dashboard)



The top right table also presents information on the number of the occurrences and the total number of posts per content tag.

By clicking on a content tag, the dashboard reveals focused information on the selected content tag:

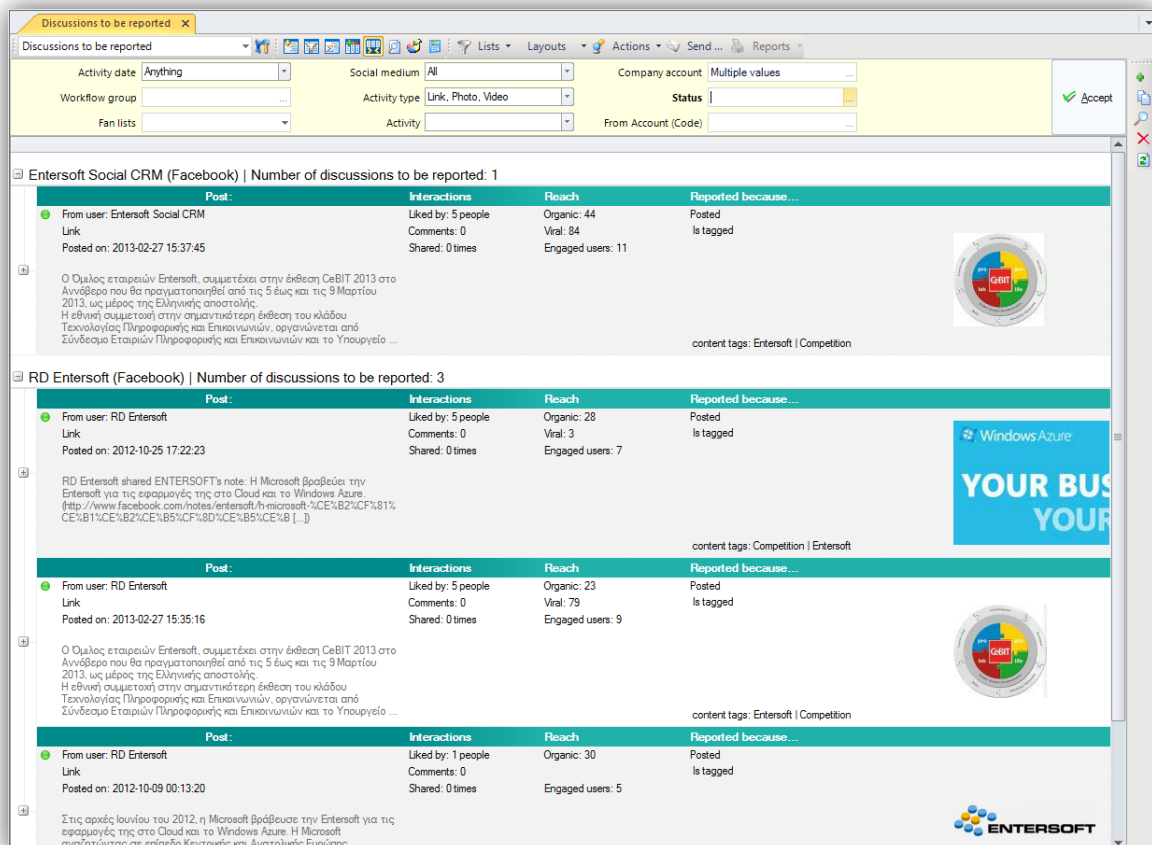
- **List of posts** that have the selected tag (bottom right, list)
- **Analysis per post type** (bottom left, bar chart), i.e. the number of occurrences and posts for a specific content tag analyzed per post type. By clicking on a bar (that corresponds to a specific type of posts) the dashboard filters the **list of posts** accordingly (additively to the selected content tag).
- **Cross-tag analysis** (bottom left, table), i.e. this table presents the content tags that occur simultaneously with the content tag that has been selected in the top right table and, moreover, in what proportion; additionally, the percentage the content tags occurs on its own is shown.

By clicking on a content-tag in the cross-tag analysis table, the dashboard filters the **list of posts** accordingly (additively to the selected content tag on the top right table) and, therefore, it allows you to focus on the posts where the specific combination of tags occurs (e.g. Social Media and Competition, or Competition and Negative etc.).

13. Discussions to be reported

As described in Section 2, there are several cases when it is necessary to focus on particular discussions that have occurred on a Company's account.

Image 79: Discussions to be reported



Discussions to be reported

Activity date: Anything | Social medium: All | Company account: Multiple values | Workflow group: | Activity type: Link, Photo, Video | Status: | Activity: | From Account (Code): | Accept

Entersoft Social CRM (Facebook) | Number of discussions to be reported: 1

Post:	Interactions	Reach	Reported because...
From user: Entersoft Social CRM Link Posted on: 2013-02-27 15:37:45 Ο Όμιλος εταιρειών Entersoft, συμμετέχει στην έκθεση CeBIT 2013 στο Αννέμπερ που θα πραγματοποιηθεί από τις 5 έως και τις 9 Μαρτίου 2013, ως μέρος της Ελληνικής αποστολής. Η εθνική συμμετοχή στην σημαντικότερη έκθεση του κλάδου Τεχνολογίας Πληροφορικής και Επικοινωνιών, οργανώνεται από Σύνδεσμο Εταιριών Πληροφορικής και Επικοινωνιών και το Υπουργείο ... content tags: Entersoft Competition	Liked by: 5 people Comments: 0 Shared: 0 times	Organic: 44 Viral: 84 Engaged users: 11	Posted Is tagged

RD Entersoft (Facebook) | Number of discussions to be reported: 3

Post:	Interactions	Reach	Reported because...
From user: RD Entersoft Link Posted on: 2012-10-25 17:22:23 RD Entersoft shared ENTERSOFT's note: Η Microsoft βράβευσε την Entersoft για τις εφαρμογές της στο Cloud και το Windows Azure. (http://www.facebook.com/notes/entersoft/h-microsoft-%CE%B2%CF%81%CE%B1%CE%B2%CE%B5%CF%8D%CE%B5%CE%B8 [...]) content tags: Competition Entersoft	Liked by: 5 people Comments: 0 Shared: 0 times	Organic: 28 Viral: 3 Engaged users: 7	Posted Is tagged
From user: RD Entersoft Link Posted on: 2013-02-27 15:35:16 Ο Όμιλος εταιρειών Entersoft, συμμετέχει στην έκθεση CeBIT 2013 στο Αννέμπερ που θα πραγματοποιηθεί από τις 5 έως και τις 9 Μαρτίου 2013, ως μέρος της Ελληνικής αποστολής. Η εθνική συμμετοχή στην σημαντικότερη έκθεση του κλάδου Τεχνολογίας Πληροφορικής και Επικοινωνιών, οργανώνεται από Σύνδεσμο Εταιριών Πληροφορικής και Επικοινωνιών και το Υπουργείο ... content tags: Entersoft Competition	Liked by: 5 people Comments: 0 Shared: 0 times	Organic: 23 Viral: 79 Engaged users: 9	Posted Is tagged
From user: RD Entersoft Link Posted on: 2012-10-09 00:13:20 Στις αρχές Ιουνίου του 2012, η Microsoft βράβευσε την Entersoft για τις εφαρμογές της στο Cloud και το Windows Azure. Η Microsoft αναζητώντας σε επίπεδο Κεντρικής και Ανατολικής Ευρώπης	Liked by: 1 people Comments: 0 Shared: 0 times	Organic: 30 Engaged users: 5	Posted Is tagged

For example, in case of a comment by a fan that necessitated our immediate reply, one would later need to review:

- the original post
- the comment per se
- the page manager's reply

...while all other activity that was not a part of this 'discussion' is excluded (e.g. comments by other users on the same original post), in order to support the meaningful and focused reviewing. Additionally, the following information can also help us determine the importance of the discussion and the effectiveness of our reaction:

- some brief statistical info, when available
- date-time info
- any related, internal communication that has been recorded
- the specific content tags that were assigned
- Some concise justification on why the discussion is included in the particular report

The Activity & Interactions dashboard (Section 2) allows you to formulate this kind of information quickly and on time (i.e. flag posts as "To be reported" and record any related internal communication. The report "Discussions to be reported" presents this information in a structured format that can be easily shared for high-level, focused monitoring.

Sharing the report

In order to share this report it is recommended to, first, expand all its levels (up to three levels, plus the grouping level) and then select the "**print preview**" action that's available on the report's toolbar.

On the preview screen you can adjust the presentation settings as desired and then **save it as PDF**.

14. Facebook Insights & Analysis

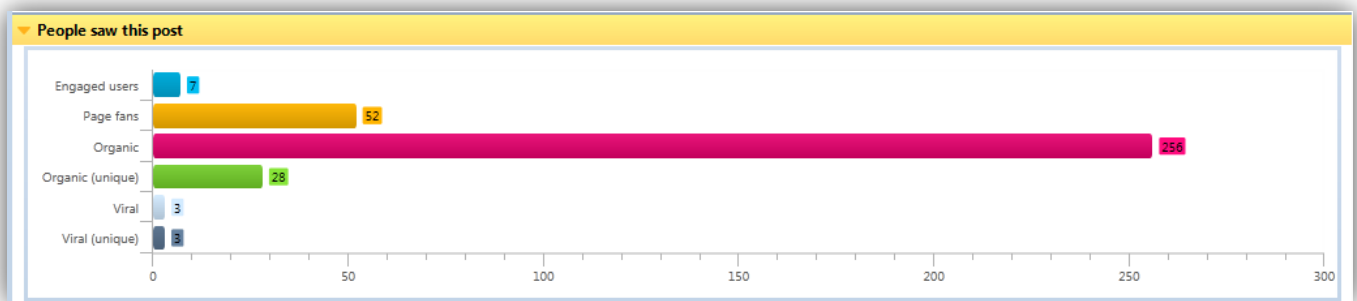
Facebook Posts & Context Insights

Bear in mind that facebook provides insights only for some types of posts (e.g. comments, replies, and direct messages are excluded) that were created by the page itself (not by "others"). Having taken this into consideration, the following insights are available in this version.

People that saw a post

This context dashboard presents the basic metrics of a post (on facebook page, posted by the page itself) as regards impressions (organic and viral, total and unique) and the number of engaged users.

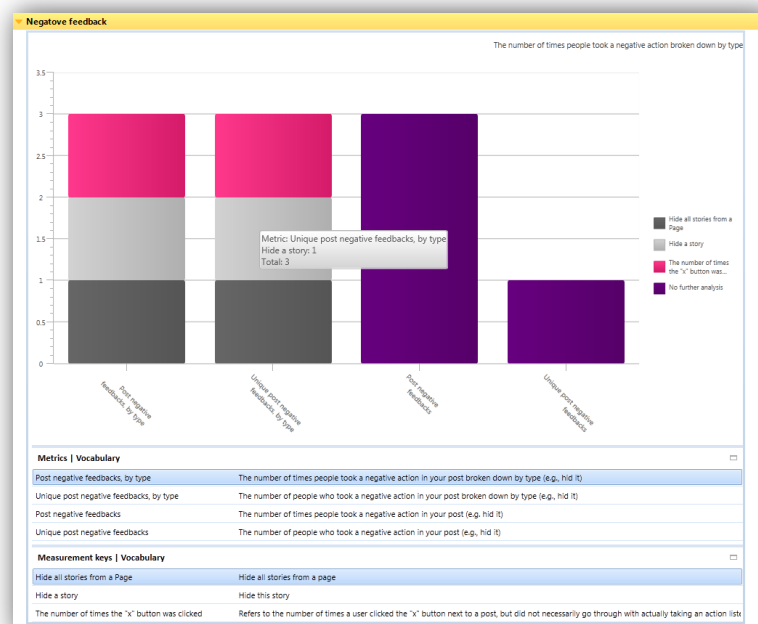
Image 80: People that saw a specific post



Negative feedback

This context dashboard present information regarding the negative feedback recorded for a specific post. The dashboard provides the definitions of each metric and measurement key that is presented in order to facilitate comprehension.

Image 81: Facebook post | Negative feedback



Activity & Insights

A list of the basic post insights is provided through this interactive dashboard (Social networking / Insights & Analysis / Activity & Insights). The dashboard lists the posts by the company account, created within a specific period of time. The default sorting is descending by its post's total reach. However, the posts can be sorted by viral or organic reach, by the number of engaged users or by the post engagement rate, or by the internally calculated post priority.

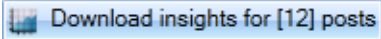
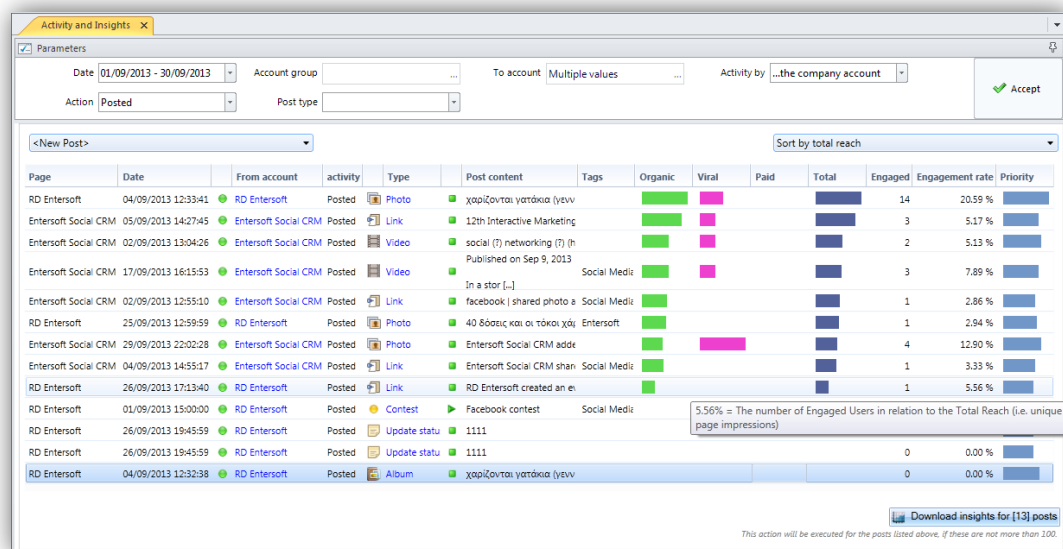
- The user can update the post insights info, by clicking on the  button.
- The dashboard also supports the creation of a new post, through the corresponding drop down selector in order to quickly create a new post based on the fans responsiveness to existing posts.

Image 82: Facebook | Activity & Insights



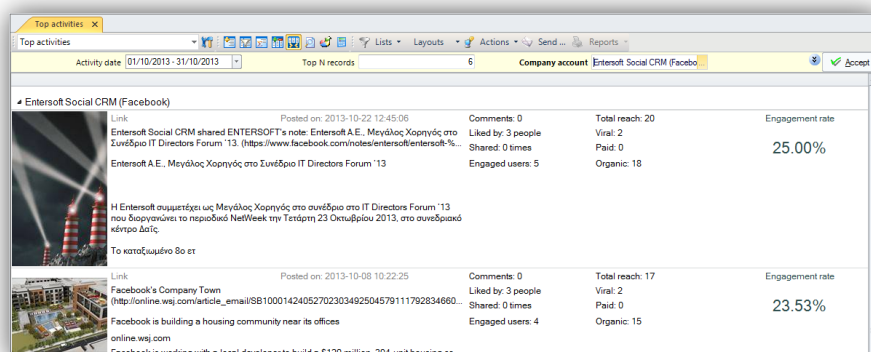
The screenshot shows the 'Activity and Insights' dashboard for a Facebook account. It includes a filter section at the top with options for Date (01/09/2013 - 30/09/2013), Account group, To account (Multiple values), Activity by (...the company account), Action (Posted), and Post type. Below the filters is a table of posts with columns: Page, Date, From account, activity, Type, Post content, Tags, Organic, Viral, Paid, Total, Engaged, Engagement rate, and Priority. The table lists several posts from 'RD Entersoft' and 'Entersoft Social CRM' with various post types like Photo, Link, Video, and Contest. A tooltip explains the engagement rate calculation: 5.56% = The number of Engaged Users in relation to the Total Reach (i.e. unique page impressions). At the bottom, there is a 'Download insights for [13] posts' button and a note: 'This action will be executed for the posts listed above. If these are not more than 100.'

Page	Date	From account	activity	Type	Post content	Tags	Organic	Viral	Paid	Total	Engaged	Engagement rate	Priority
RD Entersoft	04/09/2013 12:33:41	RD Entersoft	Posted	Photo	χαρίζονται γιόρτακια (yevv						14	20.59 %	
Entersoft Social CRM	05/09/2013 14:27:45	Entersoft Social CRM	Posted	Link	12th Interactive Marketing						3	5.17 %	
Entersoft Social CRM	02/09/2013 13:04:26	Entersoft Social CRM	Posted	Video	social (?) networking (?) th						2	5.13 %	
Entersoft Social CRM	17/09/2013 16:15:53	Entersoft Social CRM	Posted	Video	Published on Sep 9, 2013						3	7.89 %	
Entersoft Social CRM	02/09/2013 12:55:10	Entersoft Social CRM	Posted	Link	facebook shared photo a						1	2.86 %	
RD Entersoft	25/09/2013 12:59:59	RD Entersoft	Posted	Photo	40 δόσεις και οι τόκοι χαί						1	2.94 %	
Entersoft Social CRM	29/09/2013 22:02:28	Entersoft Social CRM	Posted	Photo	Entersoft Social CRM adde						4	12.90 %	
Entersoft Social CRM	04/09/2013 14:55:17	Entersoft Social CRM	Posted	Link	Entersoft Social CRM shan						1	3.33 %	
RD Entersoft	26/09/2013 17:13:40	RD Entersoft	Posted	Link	RD Entersoft created an en						1	5.56 %	
RD Entersoft	01/09/2013 15:00:00	RD Entersoft	Posted	Contest	Facebook contest								
RD Entersoft	26/09/2013 19:45:59	RD Entersoft	Posted	Update statu	1111								
RD Entersoft	26/09/2013 19:45:59	RD Entersoft	Posted	Update statu	1111						0	0.00 %	
RD Entersoft	04/09/2013 12:32:38	RD Entersoft	Posted	Album	χαρίζονται γιόρτακια (yevv						0	0.00 %	

Top activity

Similar information is provided by the "Top activities" list; however, on this list the emphasis is on both the post content and the fundamental post insights, including: likes, comments, shares, reach (viral, paid, organic, and total) and the engagement rate. The top activities are sorted by engagement rate (Social networking / Insights & Analysis / Top activities; Image 83). This list is primarily intended for reporting this information in a structured format that can be easily shared for high-level, focused monitoring.

Image 83: Top activities



The screenshot shows the 'Top activities' dashboard for a Facebook account. It includes a filter section at the top with options for Activity date (01/10/2013 - 31/10/2013), Top N records (6), Company account (Entersoft Social CRM (Facebook)), and a 'Download insights for [13] posts' button. Below the filters is a table of top activities with columns: Link, Posted on, Comments, Total reach, Engagement rate, Liked by, Shared, Engaged users, Viral, Paid, and Organic. The table lists two activities from 'Entersoft Social CRM (Facebook)' with various post types like Link and Photo. A tooltip explains the engagement rate calculation: 5.56% = The number of Engaged Users in relation to the Total Reach (i.e. unique page impressions).

Link	Posted on	Comments	Total reach	Engagement rate	Liked by	Shared	Engaged users	Viral	Paid	Organic
Entersoft Social CRM shared ENTERSOFT's note: Entersoft A.E. Μεγάλος Χορηγός στο Συνέδριο IT Directors Forum '13. (https://www.facebook.com/notes/entersoft-entersoft-...)	2013-10-22 12:45:06	0	20	25.00%	3 people	0 times	5	2	0	18
Entersoft A.E. Μεγάλος Χορηγός στο Συνέδριο IT Directors Forum '13	2013-10-22 12:45:06	0	20	25.00%	3 people	0 times	5	2	0	18
Facebook's Company Town (http://online.wsj.com/article_email/SB1000142405270230349250457911792834660...)	2013-10-08 10:22:25	0	17	23.53%	3 people	0 times	4	2	0	15
Facebook is building a housing community near its offices	2013-10-08 10:22:25	0	17	23.53%	3 people	0 times	4	2	0	15

Page overview

This dashboard (Social networking / Insights & Analysis / Facebook | Page overview) summarizes, on a monthly basis, all of the metrics that are considered as **fundamental** in order to appreciate the effectiveness of the content you post on a specific facebook page, in terms of **reach** and **engagement**.

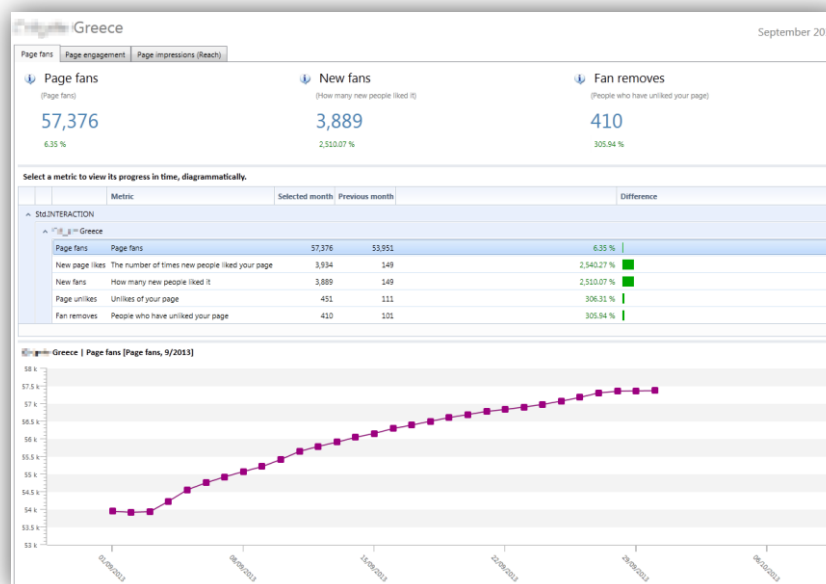
Page fans

On the first tab (Image 84), the dashboard presents some basic information about the number of the **page fans**, the **new fans** acquired in the selected period and the **lost fans** within the same period of time.

Note that the dashboard also presents the percentage of change for each distinct metric in relation to one month earlier. Moreover it offers a diagrammatical view of the progress of each metric in time. This applies to all metrics presented, in any of the dashboard tabs, i.e. the Page engagement and Page Impressions (Reach) tab.

Further information and analysis related to Facebook page fans is available at: [Page demographics](#), p. 59.

Image 84: Page overview | Page fans



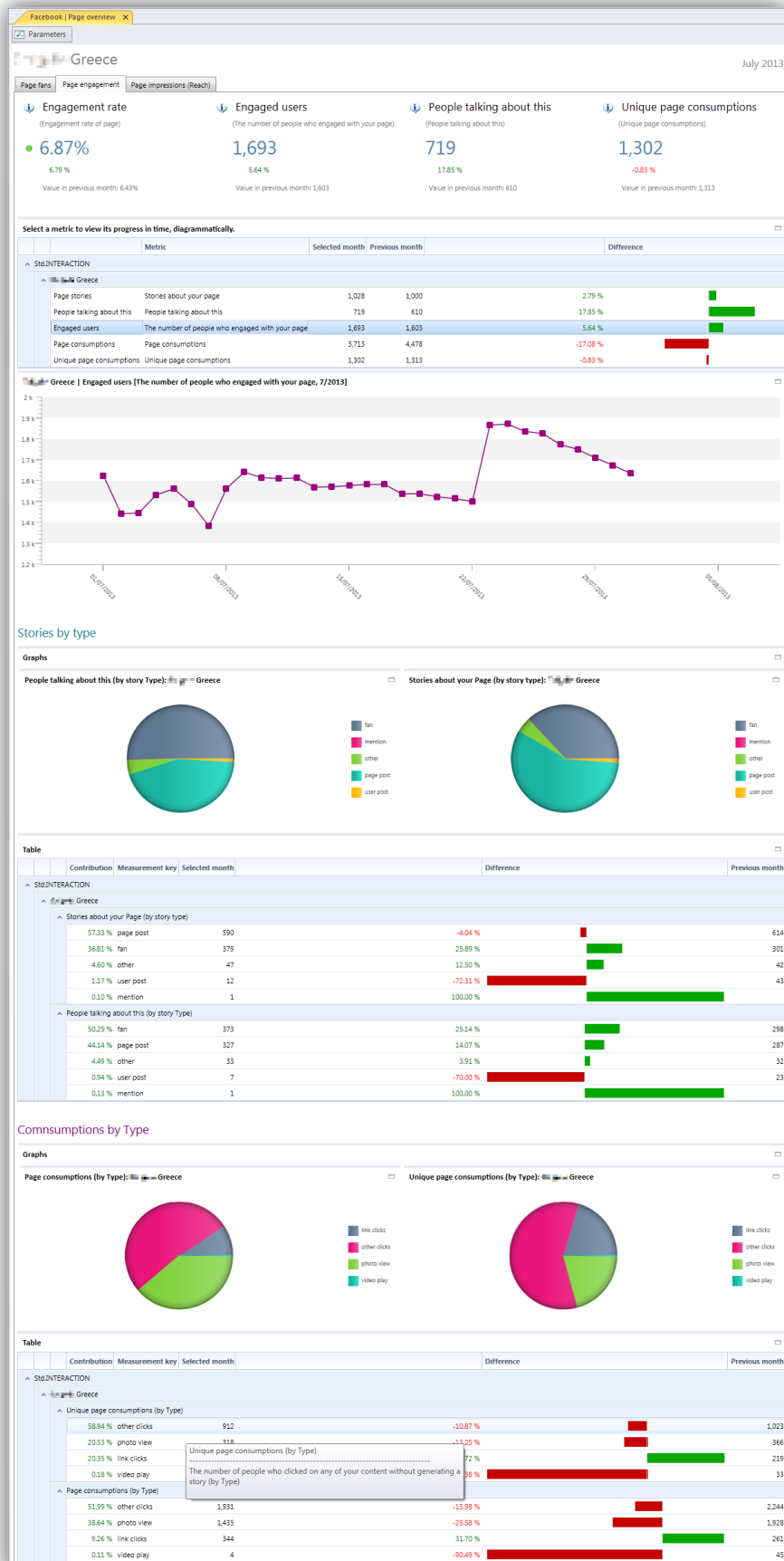
Page engagement

On the second tab (Image 85), the dashboard presents engagement-related information; i.e. information about the **engagement rate**, the **engaged users**, the **people talking about this**, and the **unique page consumptions**.

Note that the dashboard provides rich informative tooltips for all of the presented metrics, regardless the dashboard tab under study. Therefore, if some of the presented metrics are not clear to the user, contextual information is provided in order to ensure that there are clarified.

Additionally, this dashboard tab presents information related to the stories and the consumptions about the selected facebook page analyzed **by type**.

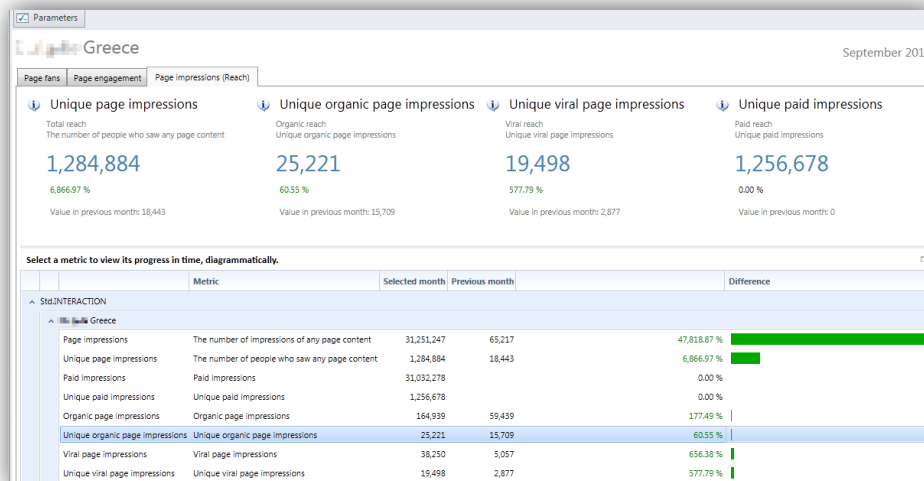
Image 85: Page overview | Page engagement



Page impressions (Reach)

The third tab (Image 86) presents impression-related information; i.e. information about the **Total** (i.e. unique page impressions) the **organic** (i.e. unique organic page impressions), the **viral** (i.e. unique viral page impressions), and the **paid reach** (i.e. unique paid page impressions) of the selected Facebook page. Moreover, the dashboard tab includes information about the page impressions (unique or not) by **Story type**. Further information and analysis related to Facebook page fans is available at: [Page impressions and views](#), p. 61.

Image 86: Page overview | Page impressions (Reach)



Page demographics

The analysis of the fans' demographics constitutes one of the most fundamental analyses that can be performed for a social media account.

Metrics such as:

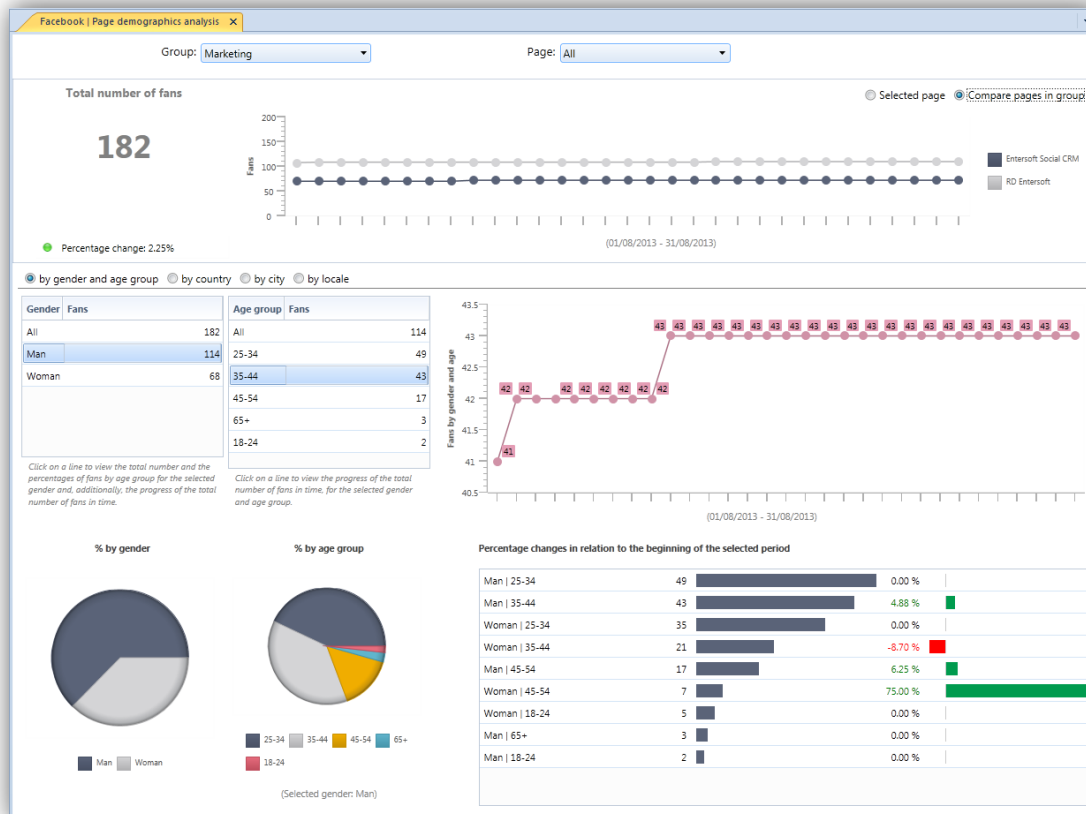
- The gender of the fans
- Their age group
- Their country
- Their city
- And their locale

...can vastly determine the content that is to be posted.

The specific dashboard (Social networking / Insights & Analysis / Facebook | Page demographics) also provides:

- Information about the **percentage change** in relation to the previous period time.
- Functionality for **comparing the performance** (in terms of fan base growth) of any number of facebook pages within the same bundle (group).
- Interactive maps (by Google or/and Bing) for the effective visualization of the fans' distribution in countries and cities.

Image 87: Facebook | Page demographics



Update map data

Facebook analytics that refer to Countries and Cities are also available on maps in order to facilitate the purposes of a concise and meaningful presentation. Entersoft Social CRM allows you to **obtain** the latitude - longitude data for the cities (city descriptions) and the countries (country ISO codes) that have been downloaded in the context of facebook insights.

This can be achieved through the **"Update map data from Google"** automation that is provided on the **"Insights: Update map data"** list (menu: Tools and Configuration / Customization / Social Networking / Update map data). The action obtains the latitude - longitude data using a Google service⁹ and updates the Entersoft Social CRM Database.



Show on map

You may also use the framework action "Show map" (that is available under the Action menu on the "Insights: Update map data" list) to review the listed information on a Bing or Google map.



The Google Geocoding API

It is strongly recommended to carefully read the conditions and restrictions described in google.com/geocoding e.g. to avoid penalties for excessive use etc.

⁹ The Google Geocoding API: google.com/geocoding

Page impressions and views

Another crucial set of metrics is this of page impressions and views. These can be examined through this interactive dashboard (Social networking / Insights & Analysis / Facebook | Impressions & Views) which:

- Includes **all facebook metrics** related to **impressions** and **views**
- Provides the **definitions** of all metrics in order to facilitate comprehension
- By clicking on a measurement on a specific date, the dashboard allows you to access the "Social media activity" view (scroller) in order to **review the posts in the time period** from three days before the selected date and until that specific date.
- Presents the **maximum** and **minimum** measurements within the selected period of time.
- Lists the external referrals, if any.
- Finally, it allows you to examine how many viewed your posts, grouped by number of post views (i.e. frequency distribution of unique post impressions).

Image 88: Facebook | Impressions & views

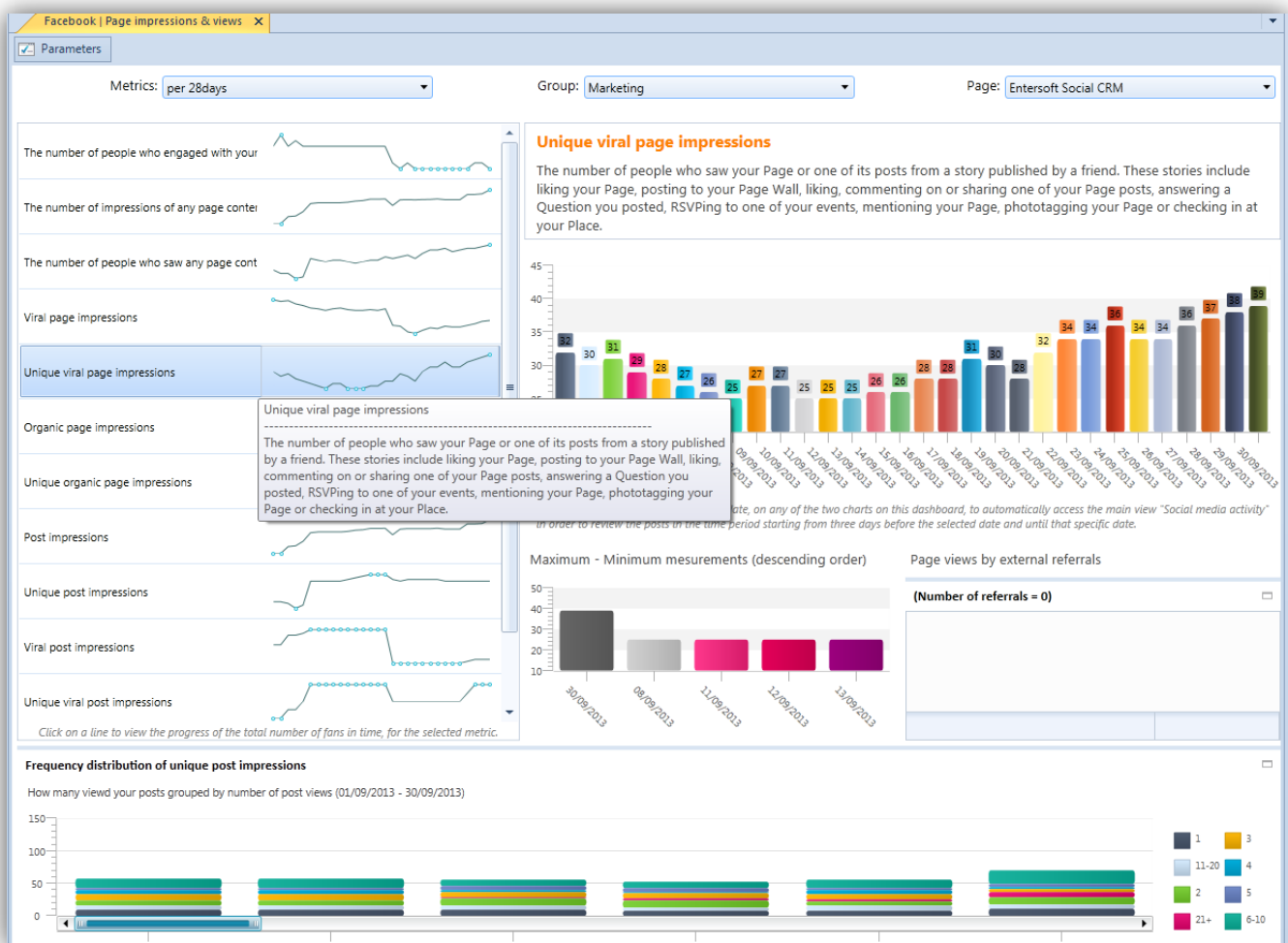
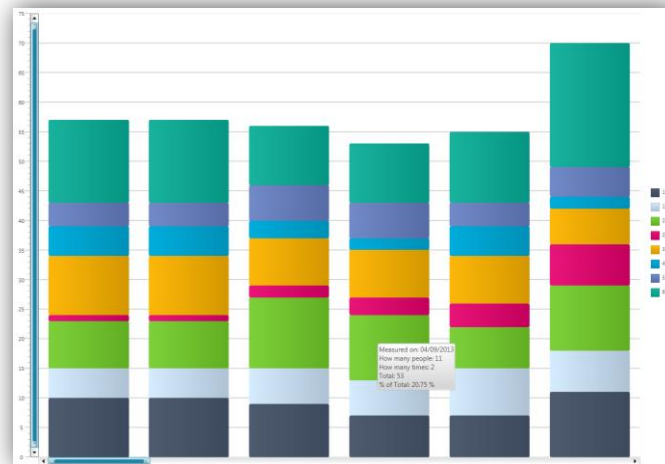


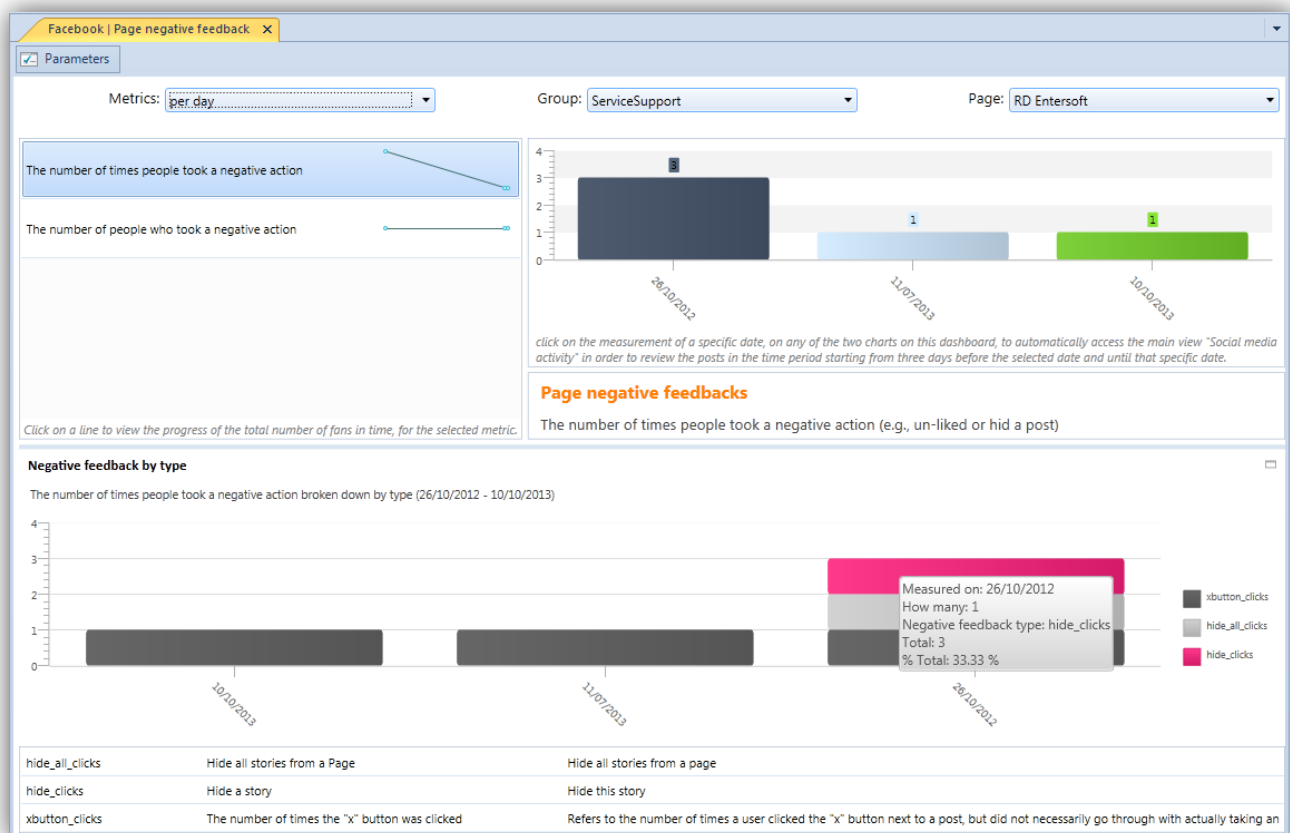
Image 89: Frequency distribution of unique post impressions



Page negative feedback

This dashboard (Social networking / Insights & Analysis / Facebook | Page negative feedback) allows you to examine the negative feedback by your page fans and other users.

Image 90: Page negative feedback



Similarly to the other dashboards:

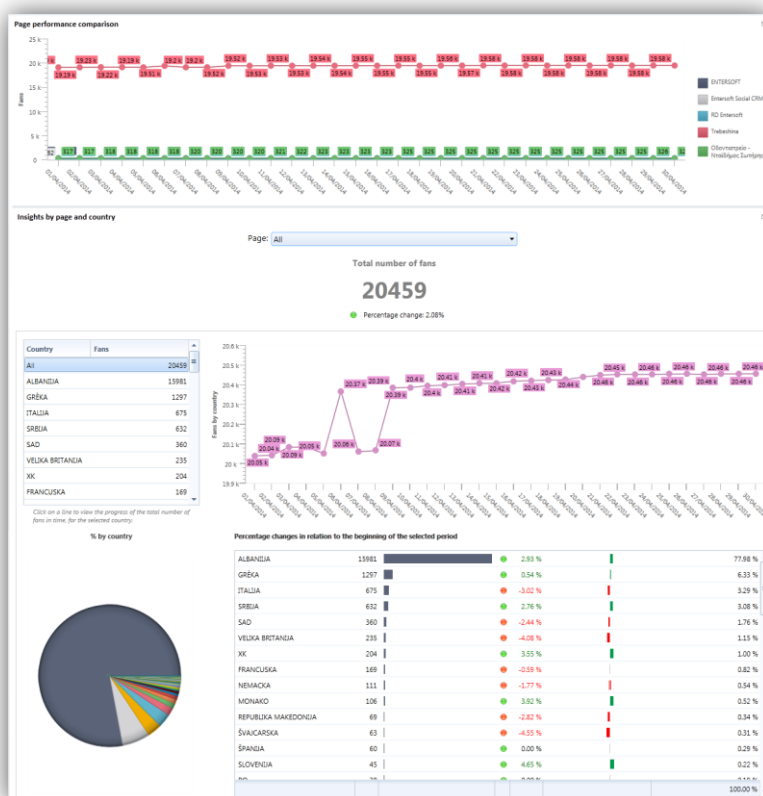
- Includes **all facebook metrics** related to page **negative feedback**

- Provides the **definitions** of all metrics and measurements in order to facilitate comprehension
- By clicking on a measurement on a specific date, the dashboard allows you to access the "Social media activity" view (scroller) in order to **review the posts in the time period** from three days before the selected date and until that specific date.
- And allows you to focus on the number of times people took a negative action broken down by time, within the selected period of time.

Watch other pages

The public insights of Facebook pages not owned by us that we have chosen to monitor (see: **public insights**) are reported through the new dashboard: **Facebook | Watch other pages**, which is available on the menu: Social Networking / Insights and Analysis. The reported insights include a comparison chart of the total number of page fans of the pages we have decided to watch and any Facebook company account we monitor in the Entersoft Social CRM. Moreover, the dashboard allows you to focus on a specific page you watch and review its fans per country, for a specified period of time.

Image 91: Facebook | Watch other pages



15. Connecting to your Twitter accounts & Facebook pages

One or more Facebook and / or Twitter accounts can be monitored at the same time. You may select the Social Media Accounts you wish to manage by Entersoft Social CRM and connect to them (menu: Tools and Configuration / Customization / Social Networking / Company Accounts). In order to connect to a Social Media Account, first you need to select the Social Network (Facebook / Twitter are currently supported) and, then, the corresponding **connector**. Click on the "Connect" button and provide the account credentials. You can "Renew access approval" in the future, if necessary.

Creating a Connector on facebook | The role of facebook apps

SocialCRM and facebook fan pages are associated through a facebook application that handles the accessibility and cooperation of the two systems.

This means that Connectors are actually facebook applications: at least one facebook application needs to be created and associated to SocialCRM for every implementation / installation.

So, in order to create a Connector as a facebook application it is needed to:

(a) **Become a 'facebook verified developer'.**

And make sure that you have access to developers.facebook.com and that you are allowed to create new apps and so forth.

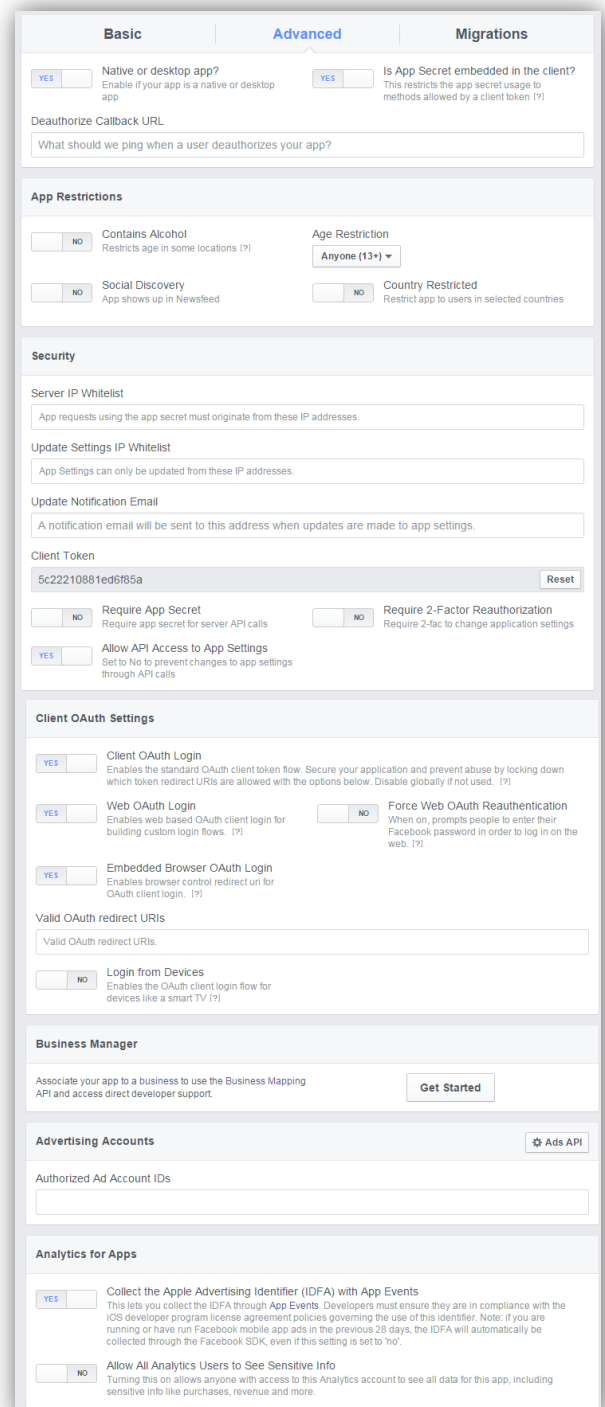
(b) **Create the facebook app.**

I.e. visit developers.facebook.com/apps and let facebook know about the new Connector you wish to create. The following steps will guide you through the configuration of a new facebook app for the specific purpose:

- Go to **My apps**
- Add a new app > **Facebook canvas**
- Type the **name** for new app, **Create new app id & Save**
- Got the app's **Basic Settings**
- Define the **Display Name & the Namespace**
- If the app is intended to be used for contests as well then **Add Platform** too (see section: 8 on page: 34).
- Ensure that advanced settings are as in the image on the right.
- Finally, make sure that the Fan Page/Company Account Administrator is also defined as the Facebook Application Administrator (in the **Roles** tab).
- Do not forget to publish the application (**Status & review** / Status: **published**)

(c) **Define the Connector in the Entersoft Application context**

In the ESNoSync folder of the Entersoft Application create a plain text file: SocialMediaConnectors.config, with the following contents. Replace the **apild** and the **apiSecret** with the ones that Facebook assigned to your application.

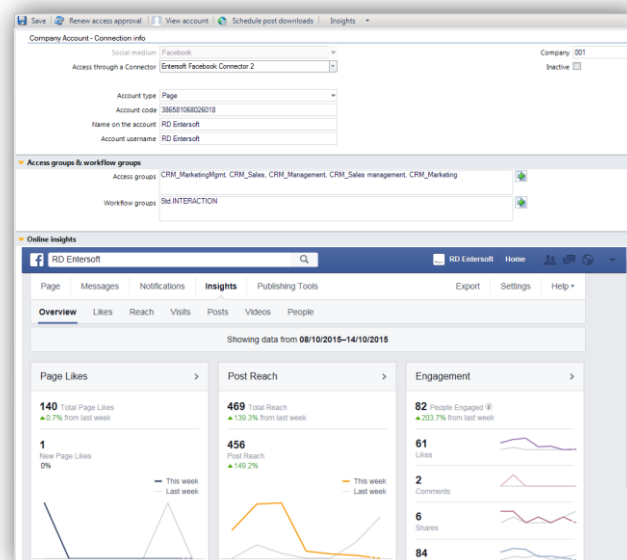


The screenshot shows the Facebook App Settings page for a new app. The 'Advanced' tab is selected. Key settings include:

- Basic:** Native or desktop app? (checked), Is App Secret embedded in the client? (checked), Deauthorize Callback URL (empty), What should we ping when a user deauthorizes your app? (empty).
- App Restrictions:** Contains Alcohol (unchecked), Age Restriction (Anyone (13+)), Social Discovery (unchecked), Country Restricted (unchecked).
- Security:** Server IP Whitelist (empty), Update Settings IP Whitelist (empty), Update Notification Email (empty), Client Token (5c22210881ed6f85a), Require App Secret (unchecked), Require 2-Factor Reauthorization (unchecked), Allow API Access to App Settings (checked).
- Client OAuth Settings:** Client OAuth Login (checked), Web OAuth Login (checked), Force Web OAuth Reauthentication (unchecked), Embedded Browser OAuth Login (checked), Valid OAuth redirect URIs (empty), Login from Devices (unchecked).
- Business Manager:** Associate your app to a business to use the Business Mapping API and access direct developer support. (Get Started button).
- Advertising Accounts:** Authorized Ad Account IDs (empty).
- Analytics for Apps:** Collect the Apple Advertising Identifier (IDFA) with App Events (checked), Allow All Analytics Users to See Sensitive Info (unchecked).

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <configSections>
    <section name="connectorsSettings"
      type="Entersoft.Framework.Platform.SocialMedia.ConnectorsConfigurationSection,
        ESSocialMediaConnector"/>
  </configSections>
  <connectorsSettings>
    <connectors>
      <add connectorId="XXX connector"
        connectorTitle="MyCompanyName Facebook Connector"
        socialMedia="Facebook"
        apiId="0000000000000000"
        apiSecret="0000000000000000000000000000000000"
      />
    </connectors>
  </connectorsSettings>
</configuration>
```

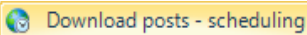
Image 92: Company account | Online insights expander



 Note that...

In case of Facebook, only "Fan Pages" are supported.

Name on the account	Account code
Account type: User	100003479440870
Account type: Page	
RD Entersoft	386581068026018
New	505139339501147
Just testing	21229390563390

When connected to a Company Account you may **schedule** the downloading of the account activity (by clicking on: )

In case of Facebook accounts **only**, you may also:

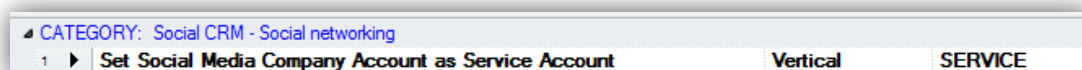
- Download the **page level insights** and **schedule** the frequency of future downloads of the statistical data. Moreover, you may download **past insights**. The Entersoft Social CRM will download all insights starting from as many days ago as defined in the company parameter: "**Number of days for downloading past insights**" and until the most recent available. Note that the default period of time is set to be 90 days (3 months approximately); the number of days can be theoretically as large as you wish; however it is recommended not to exceed the 365 days (1 year).
- Access the **online account insights** as these are provided by Facebook (Image 92, "Online Insights" expander) and the **list of your fans** ("Fans" expander).

Note that...

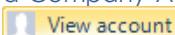
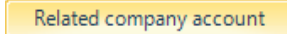
In order to access the Insights / List of fans (i.e. any social media data that is not publically accessible) it is required to login to your facebook/Twitter account. The facebook / Twitter login session will be closed after exiting the application; therefore Social CRM users are advised to login to the social media accounts they manage, within the ES Application. In case of Facebook in particular, make sure that you login as a page manager rather than the page per se.

- Moreover, here you define the **User Groups** that may access the account activity or/and create new posts. Granting user privileges at this level provides effective and meaningful row-level security; hence, different users can access different social media activity when accessing the same lists and forms.
- Additionally, the customizable **workflow groups** allow you to focus on purpose-specific social media accounts e.g. on a Twitter account specialized for providing advanced online customer service and support. These can be defined in customization (menu: Tools and Configuration / Customization / Social Networking / Company Accounts – Workflow groups). It is recommended to link any Social Media Accounts, primarily used for Service purposes, to the Service workflow group that is defined in the corresponding Company Parameter (Image 94).

Image 94: Company parameters: Defining the workflow group that sets a Company Account as Service Account



Note that...

When inserting a Company Account, a regular Social Media Account is also created. You can access this by clicking on the  button and vice versa; i.e. you can access the Company Account (if any) from a Social Media Account, by clicking on the  button.

Recommendation

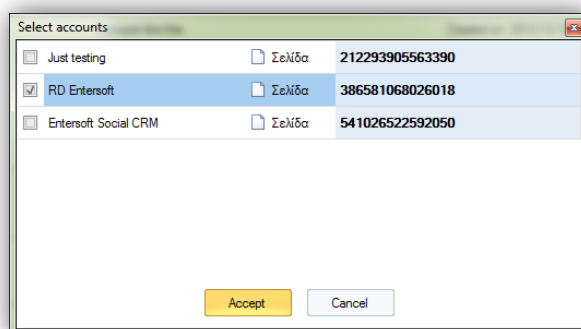
For reporting purposes, it is strongly recommended to associate the Social Media Accounts of your Company Accounts to the Person that represents your Company.

16. Downloading social media activity

The social media activity is downloaded per company account either automatically, based on the scheduling settings you have defined (see section: 15), or on demand. In order to download the activity on demand, one should go to the list of Facebook posts or the list of Tweets correspondingly.

By selecting the “**Download posts**” action which is available on these two lists, a dialogue similar to the one presented in Image 95 will be displayed. Only the accounts accessible by the current user are available, similarly to any other Social CRM list. Note that the specific dialogue is presented only when meaningful, i.e. only if more than one Facebook / Twitter company accounts exist.

Image 95: Downloading posts on demand



The Entersoft Social CRM ensures the automatic registration of the downloaded posts as **Social Media Activity Tasks** in order to allow the substantial integration with the standard Entersoft CRM.

The downloaded posts are automatically registered as Activity Tasks based on the results of the customizable “**Auto-registration list**” (Tools and Configuration / Customization / Social Networking / Auto-registration). This approach ensures the substantial reduction of ‘noise’ and, by default, the exclusion of any (typically many) Facebook auto-created stories, which do not convey any particular CRM value.

Nevertheless, the non-registered posts are also included in the recent activity analysis dashboard. Such posts are not accompanied by the  icon, as shown in Image 96. In any case, the manual / ad hoc registration of the downloaded posts is fully supported.

Image 96: Recent activity dashboard | registered and non-registered activity

From account	activity	Type	Post content		Priority
 RD Entersoft	Like	 Photo	RD Entersoft shared ENTERSOFT's pho [...]		
 RD Entersoft	Posted	 Update status	RD Entersoft likes a photo.		
 Spyros Dedes	Like	 Update status	Καλή χρονιά!!!! Ευτυχισμένος ο καιν [...]		

For the (auto-) registration to be completed successfully, the Social CRM task types and the related customization must have been imported in advance.

Baseline social CRM configuration

Use the Entersoft migration tool, which can be accessed from the Tools and Configuration / Import-Export data / Import data (advanced mode) and execute migration scenario that is available under the ESMigration\ESCRMZero application folder.

Image 97: Social media activity class - Task types

▶		SMA	Facebook - album	ES.SMA	SMA
▶		SMDM	Facebook - direct message	ES.SMDM	SMDM
▶		SME	Facebook - event	ES.SME	SME
▶		SML	Facebook - link post	ES.SML	SML
▶		SMM	Facebook - milestone	ES.SMM	SMM
▶		SMN	Facebook - notes	ES.SMN	SMN
▶		SMF	Facebook - photo post	ES.SMF	SMF
▶		SMP	Facebook - status update	ES.SMP	SMP
▶		SMV	Facebook - video	ES.SMV	SMV
▶		SMCo	Facebook contest	ES.SMCo	SMCo
▶		SMD	Twitter - direct message	ES.SMD	SMD
▶		SMT	Twitter - tweet	ES.SMT	SMT
Template					
▶		SMCT	Facebook - template comment	ES.SMCT	SMCT
Uses template					
▶		SMC	Facebook - comment	ES.SMC	SMC

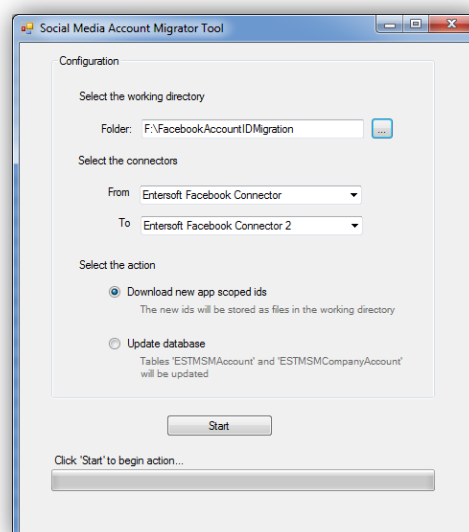


Appendix October 2015: Upgrading to Facebook version 2.x

Since 2014, Facebook proceeded to a series of major upgrades related to the way it communicates with third party applications through its API (see: <https://developers.facebook.com/docs/apps/changelog>). These upgrades vastly affected Entersoft SocialCRM. One of the most important changes was that facebook made available to 3rd party apps a App-scoped AccountID for Page Fan Interactors rather than their one, universal (and, until then, public) AccountID. This means that Entersoft had to update the IDs of all of the listed Facebook User Accounts. This update is invoked manually and your consultant will guide you through it. The following are needed for this process:

- An **Entersoft application** of version 4.0.38.1 or later.
- A **new Facebook Connector**. For registering a new, installation specific connector: see section 15.
- The `MigrateSocialMediaAccountTool.exe` which needs to be installed in the Entersoft application folder. When executed, you need to **login** using administrative Entersoft Application Credentials and then define the following:
 - **Configuration**
 - (a) **Folder**: a temporary folder for saving User Account data. Create a new, empty one and assign it to the migration tool.
 - (b) **Connectors**: select the old Entersoft Facebook Connector to the one – specific to the installation/implementation.
 - **Execution**
 - (a) First, **download new app scoped IDs**. On Start, you will be asked to login to your Facebook Account. Make sure you use administrative credentials.
 - (b) when completed, **Update the Database**

Image 98: MigrateSocialMediaAccountTool.exe



This will result any registered company accounts to be associated the new Connector and any related User Accounts will be correspondingly updated.