



Social Media Posting

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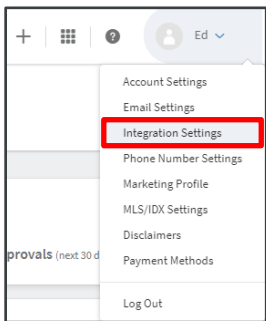
Introduction

Total Expert can integrate with your social media accounts so you can post materials created in the platform directly to those accounts. This allows you to stay in front of your existing social network—and help it grow—while still taking advantage of the compliance and tracking tools available in Total Expert.

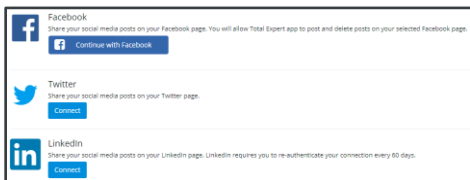
Account Integration

Before a user can post any content from Total Expert to a social media site, that user must integrate their Total Expert account with their account for each site where they want to share posts. Total Expert currently supports integrations with Facebook, Twitter, and LinkedIn.

To integrate a social media account, navigate to **settings menu → Integration Settings**.



Click the button for the account you want to integrate and follow the prompts.





Tip

You can save a step in the integration process if you are already logged in to the account in another tab of your browser.

Creating a Post

Note

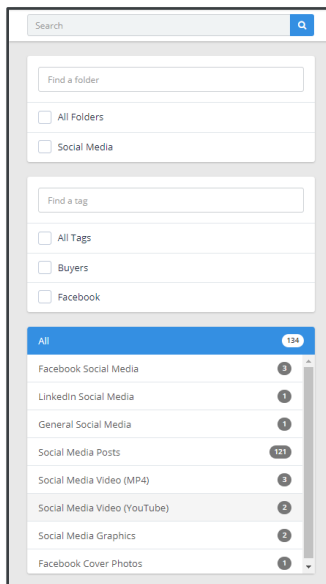
This section assumes that your content has already been created and added to your Total Expert library. Content must be classified as a social media type to appear in the list at **Web Marketing → Social Media → Create New**. If you do not see content you expect, check with your marketing administrator.

The process for posting to social media from Total Expert depends on whether you are posting a piece added via the static content uploader, posting a standard social media piece, or creating a standalone post.

Static Content

Pieces uploaded via the static content uploader have been specifically pre-approved with no opportunity for you as the end user to make changes to the piece. You only need to enter the custom text you want to be posted with the piece.

1. Navigate to **Web Marketing → Social Media → Create New**.
2. Locate the content you want to post using the search feature, folders, tags, or filters.



3. For the content you want to post, select **Actions → Share**. The Social Post box appears.

Note

If you see the Select option instead of Share, see the Standard Content section below.



4. Select which of your integrated accounts you want to post the content to. (You can post to more than one at the same time.) If the account you want to post to is not integrated yet, you can click the appropriate button to complete that integration directly from here.

Note

A particular piece may only be approved for use on particular sites. If the Social Post box does not include the option for the site you want to post to, the piece has not been approved for that site. Check with your marketing administrator.

5. (optional) Select a website from the **Share a link** drop-down menu. The available options are configured as part of your user's Account Settings. The selected link is posted as part of the message with the piece.
6. (optional) Enter any text you want to be posted with the piece in the **Message** field.
7. Schedule whether to post your content immediately or in the future.
 - a. To post immediately, click the **Post Now** button at the bottom of the Social Post box. Before posting, you can optionally select a date in the **Removal Date** field to specify when the post should be taken down.
 - b. To schedule the post for the future, select a date and time when you want the post to appear using the **Post Date** and **Post Time** fields. You can optionally select a date in the **Removal Date** field to specify when the post should be taken down. Then click the **Schedule** button at the bottom of the Social Post box. (Do not click the Post Now button, or the piece will be posted immediately, regardless of anything set in the Post Date and Post Time fields.)

Tip

Using the option to schedule posts for the future, you can set up all of your social media posting for a whole week (or more) in one sitting.

Standard Content

Social media pieces that are added to the library via the same method as standard print pieces require an additional step because they adhere to the same process of saving a draft and receiving approval that is used for print pieces. These pieces may or may not have any editable areas, but they must go through these steps regardless.

1. Navigate to **Web Marketing → Social Media → Create New**.
2. Locate the content you want to post using the search feature, folders, tags, or filters.
3. For the content you want to post, select **Actions → Select**.
4. Select any available options (there may not be any other than selecting your profile).
5. Click the **Customize And Publish** button at the top of the page.
6. Make any adjustments to the piece you want, as allowed by the definition of the piece.
7. Enter a name for this specific instance of the piece in the **Media File Name** field.
8. Click the **Save First Draft** button.
9. (optional) Make any further edits, and enter some text to indicate what the draft is in the **Add Draft Note** field. Save as many drafts as you like using the **Save Draft** button.
10. When you are satisfied with the piece, click the **Save & Publish** button. (If the piece requires approval, this button is replaced by the **Save & Request Approval** button.)



11. You are automatically directed to **Web Marketing → Social Media → Saved**, and the view is filtered to show only your new piece. You can return to this page and find it on the list any time later.
12. If the piece has an approval flow applied, wait for the relevant user(s) to give their approval. This follows the same process as approval for a print piece.
13. When the piece is approved (or at any time if the piece does not need to be approved), select **Actions → Share**.
14. The Social Post box appears. Post the piece following the instructions beginning with step 4 in the Static Content section above.

Standalone Post

You can quickly create a text-only social media post, or one with a pre-approved piece, without going through the full process outlined above.

1. Navigate to **Web Marketing → Social Media → Scheduled/Posted**.
2. Click the **Create Post** button.
3. The Social Post box appears. This works in mostly the same way as described in the Static Content section above, with the following exceptions:
 - a. There is no content piece selected.
 - b. If there are any pre-approved content options, you can select one from the **Select Approved Media** field. Or you can simply create a text-only post.

Warning

This method does not include any form of review. Only create a post if you are sure it satisfies compliance regulations and policies.

Managing Posts

Once a post has been scheduled or posted, you have the opportunity to change some—but not all—aspects of the post. For pending future posts, you can change the time and date the post will go live and the date it will be removed, but you cannot change the image, text, or link included in the post.

1. Navigate to **Web Marketing → Social Media → Scheduled/Posted**.
2. Find the post you want to manage in the Scheduled section (left side of the page).
3. Click the ellipsis button [...] in the upper-right corner of the post and select **Edit**.
4. Change the options as desired and click the **Schedule** button.

Once a post has been made, you can only remove it. You can also remove a post that is still awaiting the scheduled time to go out.

1. Navigate to **Web Marketing → Social Media → Scheduled/Posted**.
2. Find the post you want to remove in either the Scheduled section or the Posted section.
3. Click the ellipsis button [...] in the upper-right corner of the post and select **Delete**.

Note

You cannot remove a post that has already been posted to LinkedIn via Total Expert. It can only be removed by logging in to LinkedIn directly.