

# User Guide: Twitter Dashboard

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This guide walks you through the steps for setting up and using the Act-On Twitter Prospector Dashboard.

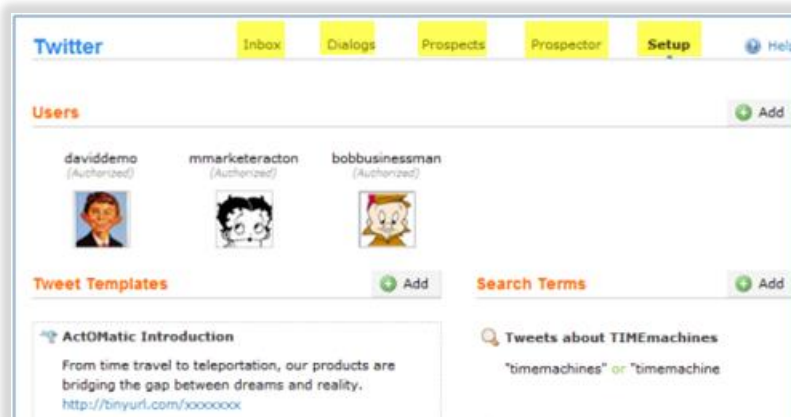
## INTRODUCTION

The Twitter Dashboard includes the Prospector, an engine to generate leads. This tool allows you to discover, communicate with, and track new prospects.

Finding potential customers is easy. Act-On provides custom search templates in a Twitter prospecting dashboard. Your searches yield potential prospects tweeting about your preferred search terms. Once you discover a prospect, you can keep track of your dialogs, save incoming tweets, and analyze your prospect's website activity.

The Twitter Dashboard can be opened right from the **Quick Start Menu**, or from a link on the Home drop-down menu.

After a brief initial **Setup**, you can start using the full Twitter feature set to track your successes and tag prospects for follow up and conversion.



## DASHBOARD TABS

- **Inbox** contains tweets from prospects that you've tagged for response or follow-up at a later date, as well as any direct responses to your tweets.
- **Dialogs** give you the ability to view all of your ongoing dialogs in detail in a single area.
- **Prospects** shows prospects you've driven to your website and landing pages.
- **Prospector** helps you search for conversations and tweets that contain your chosen key words.
- **Setup** guides you through setting up accounts, search terms, and Tweet Templates.

All of these areas are discussed below, as well as how to use them effectively for your social marketing initiatives.

### Document shortcuts

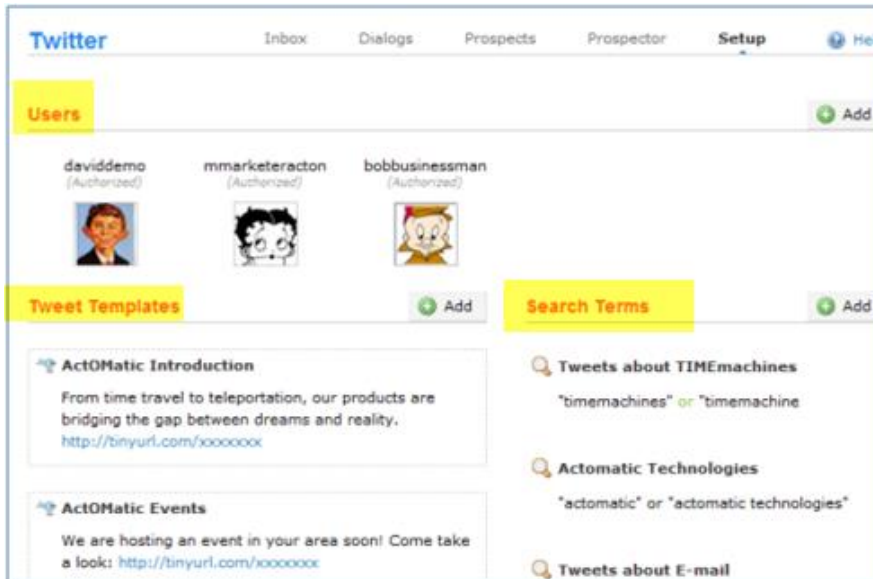
- [Setup](#)
- [Prospector](#)
- [Inbox](#)
- [Prospects](#)
- [Dialogs](#)

Watch a video showing how to [use the Twitter Prospector](#)

## SETUP

When you first access the Twitter dashboard, the system displays the **Setup** area to get you started.

There are three areas to configure: **Users**, **Tweet Templates**, and **Search Terms**.



### CONFIGURE “USERS” TWITTER ACCOUNTS

*Tip: Use a business account rather than your personal Twitter account. If you don't have a Twitter account devoted exclusively for business use, create one now.*

1. Click **Add** in the upper right corner and enter a Twitter **Username** and **Password**. A connection to that Twitter account will be established. This must be a Twitter account with tweeting privileges.
2. Once the account has been accepted, the profile name and picture appear in the list of users, ready for authorization.
3. To complete authorization of your Twitter account, hover your mouse over the profile picture and click **Authorize**.
  - a. A pop-up window appears and asks you to Allow or Deny access from Act-On to the account.
  - b. Enter the Twitter account login name and password and click **Allow**.

If the login account and password credentials are correct, the connection will be complete.

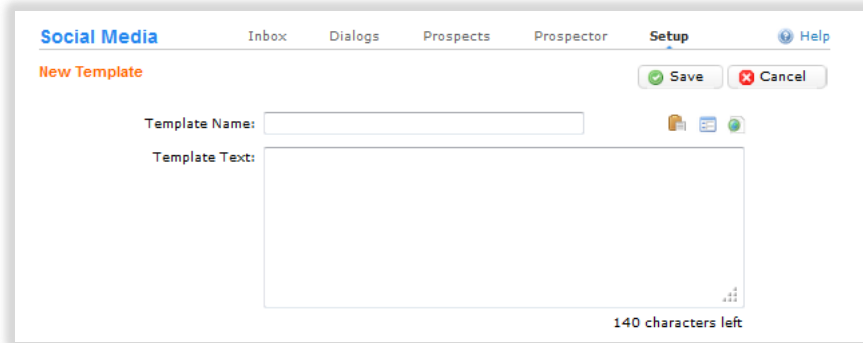
You can add more Twitter profiles by clicking the green **Add** button in the upper right corner. To delete a Twitter profile, hover your mouse over the profile image and click **Delete**. This will remove the profile from the **Users** area.

Once an initial Twitter profile has been specified, you can move on to the rest of the setup process.

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## CONFIGURE AND MANAGE TWEET TEMPLATES

**Tweet Templates** allow you to save time on large-scale prospecting, by allowing you to issue many similar tweets without having to retype the content each time. Tweet Templates will also automatically shorten URLs according to the preference established in your profile. This applies to any website, landing page, or form URL you'd like to promote.



*Tip: Notice that when including a link in your Tweet Template, Act-On automatically recognizes the URL and shortens it with the service (such as tinyurl or bit.ly) specified in your Twitter profile. The system counts the length of the shortened URL when calculating the available characters you have left to use.*

1. Click **Create a Tweet Template** in the Tweet Template area to create your first template. You see a field for a name and a field for the text in your tweet. Enter a name for the template and then enter the content that you would like to promote. There are additional icons above the text box that allow you to insert content from other Tweet Templates, as well as links to existing Act-On forms or landing pages.
2. Save the template.
3. Click **Add** in the Tweet Template area to create more templates.

## CONFIGURE AND MANAGE SEARCH TERMS

Set up and use search terms to quickly identify good prospects. You can modify these search terms at any time, and create as many as you'd like.



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Tip: *Twitter has multiple methods for effective searching. Examples are shown in the search term creation view for easy reference. Two basics are to use "OR" or "AND" in all capital letters when searching multiple terms.*

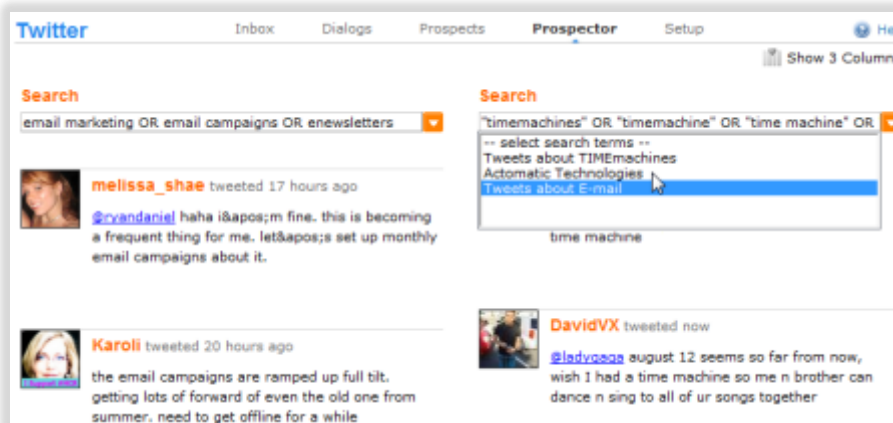
To create your first search term:

1. Click **Create a search string** in the Search Terms area. You see a field to enter a name for your new search term and a field to enter the search terms you want to use.
2. Choose a name that's very descriptive, so later you can tell at a glance what this search does.
3. Once you've finished creating your first **Search Term**, click **Save**.
4. To create additional search terms, click **Add** and repeat this process for any additional terms you'd like to use moving forward.

## TWITTER PROSPECTOR

The **Prospector** is where you will use your search templates to find potential prospects. The Prospector executes your searches and displays all prospects who have used your search terms in tweets.

To access the Prospector, click the **Prospector** link at the top of the Twitter Dashboard.



Watch a video showing how to [use the Twitter Prospector](#)

## SEARCH

To find prospects, use the drop down menu at the top of each search column. The drop down menu displays all of the search templates that you've set up. You also have the option of choosing **-- select search terms --**, which allows you to define your search terms without using a previously created template.

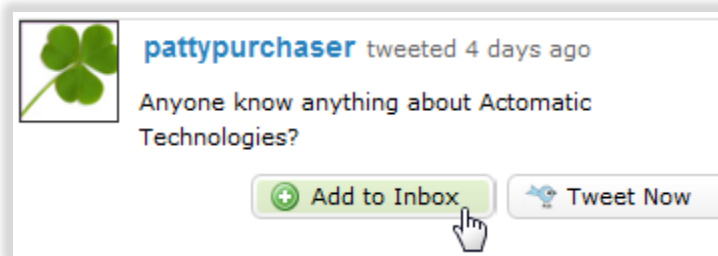
Occasionally, you may want to make a one-time edit to a search template. In this case simply choose your search template and notice that the search terms are displayed in the text box. Click on the search terms and modify them as you wish. Then press the Enter/Return key to execute the search.

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The default display is to have two columns that accommodate two searches. If you'd like to expand your searches to include an additional search term, click the **Show 3 Columns** in the upper right corner and an additional column is added to the interface.

### ADD TO INBOX

Now that you've set up the Prospector to find individuals according to your search terms, you can scan through the tweets returned by your search and find prospects that look like good candidates for you. Hover your mouse over any tweet and select either **Add to Inbox** or **Tweet Now** to begin interacting with the prospect.

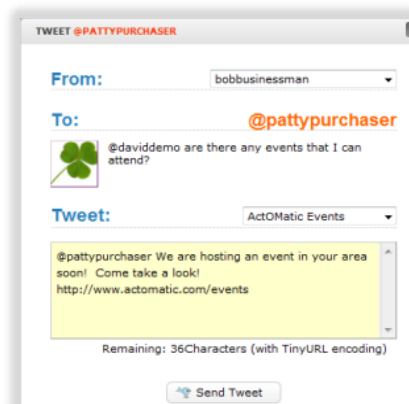


Clicking **Add to Inbox** marks the tweet for future follow-up. All marked tweets appear in your Inbox area, along with any replies to your tweets. You might mark a tweet for follow-up if the tweeter seems to be a particularly good prospect you'd like to track, or if you don't have save the tweet and respond later.

### TWEET NOW

**Tweet Now** allows you to respond to a prospect's tweet immediately. Use the **From** drop down menu to select a Twitter profile from your list. Choose a profile. Then, you can either type a response or pick one of the templates you've set up.

If you choose a tweet template, the template contents are inserted into the text box where you can make changes or modify the message.



*Tip: If you plan to send an URL to prospects, ensure that you preface the URL with `http://`. Act-On recognizes the URL and automatically creates shortened URLs prior to sending out the message. Notice that the character count in the tweet reflects the shortened URL length.*

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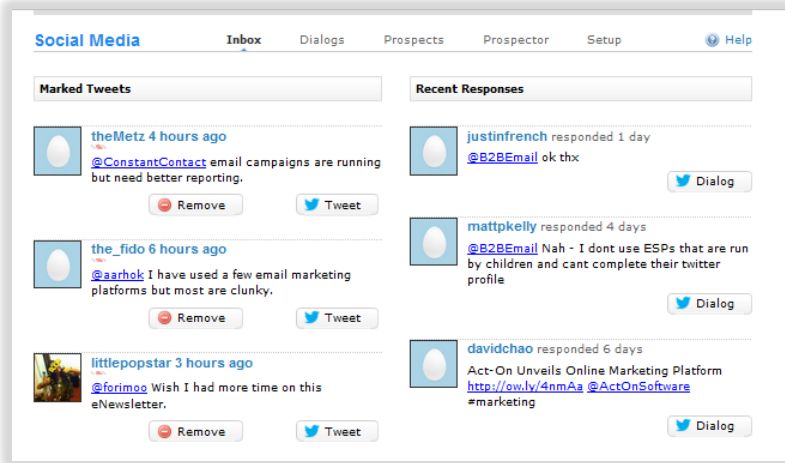
Once a response tweet has been sent to a prospect, the original tweet still appears in your search. If you hover your mouse over the tweet, the options and the look of the profile have changed.

After you respond to a tweet, it will show a yellow caution icon (to help prevent multiple tweets) and the available options are changed to **Add to Inbox** and **View Dialog**.

Clicking **View Dialog** brings you to a full view of your interactions with the prospect and allows you to continue your conversation.

## INBOX

The **Inbox** allows you access to saved tweets that you marked while prospecting, as well as any direct responses you've received to your outbound messages. Saving tweets allows you to respond to them at a later time, and also allows you to identify prospects who are interested in your promotions.



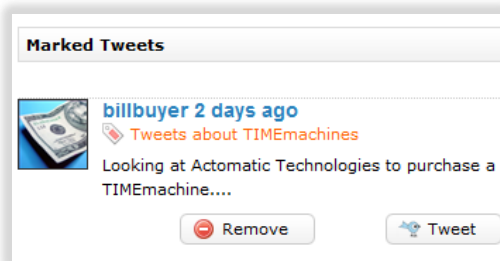
Tweets are added to your Inbox from the Prospector area of the Twitter Dashboard.

## MARKED TWEETS

Marked tweets are designed to assist you in keeping track of prospects you've identified for follow-up. Once a tweet is marked you can:

- **Tweet** back to the prospect to finish a conversation or provide requested materials
- **Remove** the tweet if you're no longer interested.

You also see the **Search Term** that you used to find the prospect, and the tweet they published.

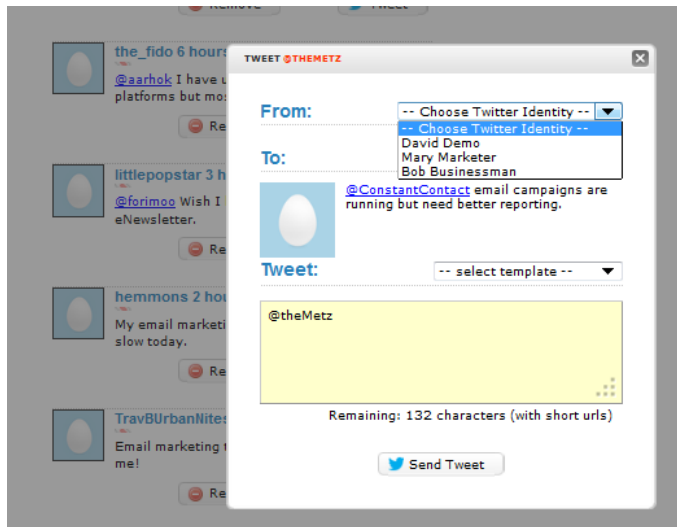


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Click the profile picture to view details about the prospect, including their bio, followers, and who they follow.

To tweet, click **Tweet** and:

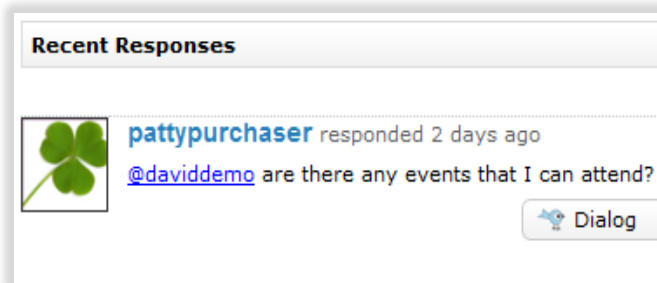
- Choose which profile you'd like to use
- Choose which Tweet Template to use. You can edit the contents of the template prior to sending out your tweet.



## RECENT RESPONSES

Prospects who have directly responded to your tweets are located in the **Recent Responses** area. A note indicates when they responded back to your initial message.

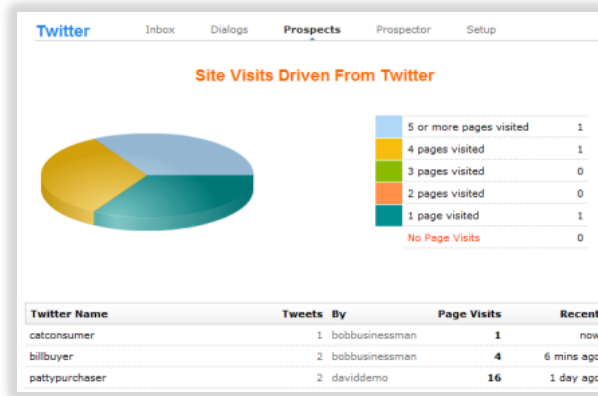
- Click the profile picture or the Twitter name to view details about the prospect you are conversing with, including their bio, followers, and who they are following.
- Click **Dialog** to view the conversation that interested the prospect enough to respond back to you. You can click to **Continue Dialog** with the prospect.



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## PROSPECTS

The **Prospects** page allows you quick and easy access to your prospects and their activity records. Using the same technology as Act-On's **Website Visitor Tracking**, the Prospects main page shows you the most recent and active Twitter prospects you've brought to your web pages.



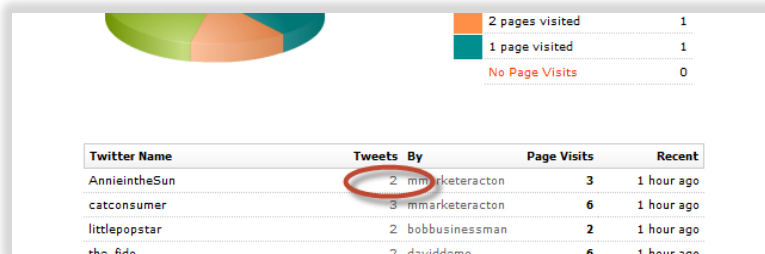
## SITE VISITS

A pie chart gives you an immediate overview of your Twitter prospects' level of interest. The right side of the chart provides more in-depth detail of those prospects and the number of pages they've visited - segmented out by 1, 2, 3, 4, or 5 or more visits to your website. Click any of the number-of-visit categories to sort your prospects for more in-depth analysis. This allows you to follow up with your tweet successes.

## DRILL DOWN INTO PROSPECTS

Whether you've sorted your prospects or are viewing all prospects, each individual has unique clickable information. This function allows you to research, follow up, or learn more about who your potential customers are and what they have been doing.

- The first column contains the **Twitter Name** of your prospect. Clicking the Twitter Name pops up the individual's Twitter bio so you can learn more about your prospect.
- Clicking the **Tweets** count (the actual number) lets you view your dialog(s) with this person, and continue the conversation.



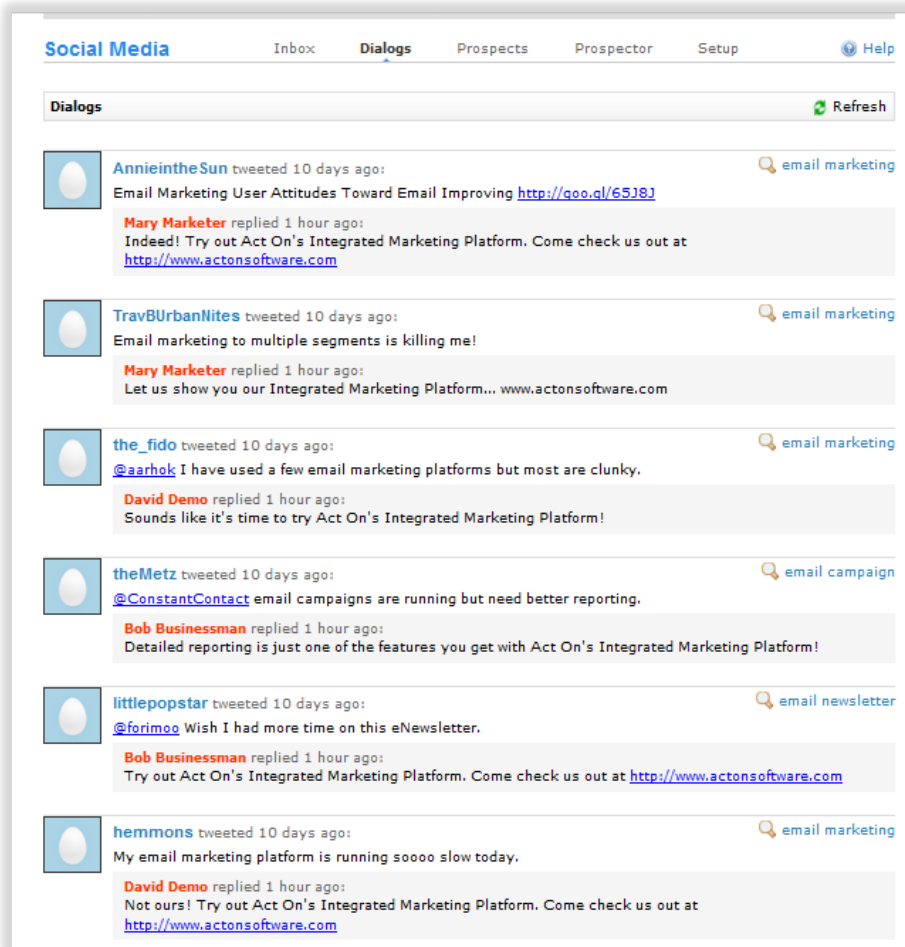
- Clicking on the **Page Visits** count of an individual lets you view the activity history of this prospect to get a feel for what they are interested in as well as the IP address they are visiting from. This is a great way to research a prospect and identify where they are located or what company they are with. The final column shows the date of the prospect's last visit to your website.

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## DIALOGS

The **Dialogs** area of the Twitter dashboard allows you to view all of your ongoing conversations at a single glance. The Dialogs area is a great place to review all of your activity to locate the highest rated prospects and learn more about your potential customers. When viewing your conversations, click on a prospect's profile picture to view their Twitter profile data.



The screenshot shows the 'Dialogs' section of the Twitter dashboard. At the top, there are navigation tabs: 'Social Media', 'Inbox', 'Dialogs' (selected), 'Prospects', 'Prospector', 'Setup', and 'Help'. Below the tabs is a 'Dialogs' header with a 'Refresh' button. The main content area displays a list of tweets and replies. Each tweet entry includes a profile picture, the user's name, the time since posted, the tweet text, and a search icon with a category label. Replies are shown in a light gray background below each tweet.

Tweet User	Time	Tweet Text	Reply User	Reply Time	Reply Text
AnnieintheSun	10 days ago	Email Marketing User Attitudes Toward Email Improving <a href="http://goo.gl/65J8J">http://goo.gl/65J8J</a>	Mary Marketer	1 hour ago	Indeed! Try out Act On's Integrated Marketing Platform. Come check us out at <a href="http://www.actonsoftware.com">http://www.actonsoftware.com</a>
TravBUrbanNites	10 days ago	Email marketing to multiple segments is killing me!	Mary Marketer	1 hour ago	Let us show you our Integrated Marketing Platform... <a href="http://www.actonsoftware.com">www.actonsoftware.com</a>
the_fido	10 days ago	@aarhok I have used a few email marketing platforms but most are clunky.	David Demo	1 hour ago	Sounds like it's time to try Act On's Integrated Marketing Platform!
theMetz	10 days ago	@ConstantContact email campaigns are running but need better reporting.	Bob Businessman	1 hour ago	Detailed reporting is just one of the features you get with Act On's Integrated Marketing Platform!
littlepopstar	10 days ago	@forimoo Wish I had more time on this eNewsletter.	Bob Businessman	1 hour ago	Try out Act On's Integrated Marketing Platform. Come check us out at <a href="http://www.actonsoftware.com">http://www.actonsoftware.com</a>
hemmons	10 days ago	My email marketing platform is running soooo slow today.	David Demo	1 hour ago	Not ours! Try out Act On's Integrated Marketing Platform. Come check us out at <a href="http://www.actonsoftware.com">http://www.actonsoftware.com</a>

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