

BlueCamroo

User Guide v. 4.0



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This Guide is Version: **4.0.1**


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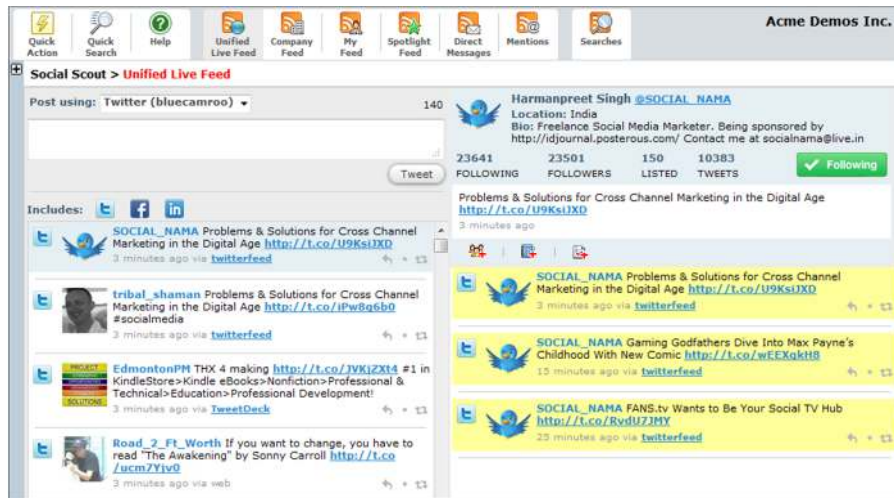
5. Getting Social

5.1 The Social Scout





BlueCamroo makes it possible to tap in to three of the most popular online Social Networks – Twitter, Facebook and LinkedIn – to send and receive messages and to seek out sales opportunities, service issues and market “buzz”. The main Social Network capabilities are located in the Social Scout module, which is accessed by selecting the  **Social Scout** option from the Explorer Bar.


Unified Live Feed


The default view in the Social Scout is the  Unified Live Feed. This shows updates from anyone you follow on Twitter; from your Facebook friends; and from your LinkedIn contacts. If Social Scout is configured with both your Company’s and your personal social network account details, you will see updates from all accounts. (If others in your organization have also configured Social Scout with their individual account details, and have shared their Social access with you, their results will be shown too. See Page 12 for information about setting up and sharing personal Social Accounts.)






Filtering the Feed





The Toolbar provides options to filter the Unified Feed down to just  Company Account;  Personal Account;  Direct Messages (Twitter) and  Mentions

(Twitter). Additionally, the  Spotlight Feed focuses in only on updates from People and Organizations that exist within your BlueCamroo system.

Using the  group of buttons, you can also Toggle-Off / Toggle-On Twitter, Facebook and LinkedIn from your results.

Taking Action

New messages and updates appear in the left hand side of the screen. You can click the icons to Reply  Retweet  or Direct Message  via Twitter, or the action links to **Like** or **Comment** via Facebook or LinkedIn, and to **Send Message** via LinkedIn.

Clicking on the thumbnail brings the message and the poster into focus on the right hand side of the display, where you have additional options to save the person as a Lead , Customer , or to create a Task  to follow-up. If the person whose message you are focusing on is already in your BlueCamroo workspace, you will have the option to Save the Message  to their record.

Social Search Channels

In addition to keeping up with those you follow, friend or link to, the Social Scout allows you to monitor Twitter and public Facebook updates for sales opportunities, service issues, and market “buzz”.

The screenshot on the following page shows results from a **Sales Opportunity Search** that a legal firm might use to locate people who need advice with patents and trade marks. As with listings in the Unified Feed, each result can be brought into focus in the right-hand side panel, to view extended information about the poster, and to create new Leads and Tasks within your BlueCamroo database. If any Sales Opportunity looks worth following up, you can Tweet a response instantly, straight from BlueCamroo.

Of course, you can search social updates with many other tools, but here’s what’s special about using BlueCamroo:



1. You can create Searches that combine **Keywords** with **Filters**. In this example, we've combined Keywords such as *patent attorney* and *trade mark lawyer* with Filters such as *I need* and *what's the best?* Using Filters in this way focuses in on "buying signals", and greatly increases the proportion of your results that are worth following-up.

2. Social Scout is integrated into your CRM Database, so you can directly create Leads and record your communications, just like with any other Lead Source.

3. You can narrow your searches by Language and Location to get just the results you want.

want"; "We need" and "Can you recommend". Only tweets that match at least 1 Keyword AND at least one Filter are selected. Both key-words and filters can be customized to optimize your results.



Buzz

Similar to Sales Opportunity search, but combines "Domain interest" keywords (your industry; particular brands; etc) with "Buzz" filters – emotive terms such as "rocks"; "sucks"; "best"; "worst" "fail", etc. Great for picking up on the mood in your sector. Again, use your choice of Keywords and Filters.



Client Support

This channel helps you identify and respond to customer issues. Keywords should be specific to your business – such as your brand and product names. Filters reflect language that customers may use when they have an issue, such as "problem with"; "need help"; etc. Note that results matched on the Client Support channel also provide the opportunity to directly Add a Case 📄 for follow-up.



General

Unlike the first three Channels, the General channel has no Filters, allowing you to capture the broadest range of updates that match your chosen keywords.

Finally, there is also the option to configure **Locations**, for use in Social Searches.

Social Scout Setup - User

Depending upon their Permissions, individual Users may view the Unified Feed and Search Channels using the Company's social IDs, and may also post on behalf of the Company. Additionally, Users may input details of their personal social accounts, to work with their personal results alongside the Company results.

To configure personal Social IDs, click **Setup** ⚙️ | **My Social Networks**. Note that each User controls via the **Sharing** tab which (if any) other Users may work with their social accounts.

Social Scout Setup - Administrator

To configure the Social Scout with your Company social IDs, click **Setup** ⚙️ | **Social Scout** | **Social Networks**. (Note that the Social Scout uses your Company social accounts to perform searches, so these must be set up to activate the Search Channels.)


Also at **Setup** ⚙️ | **Social Scout**, four **Social Search Channels** are available to set up, as follows:




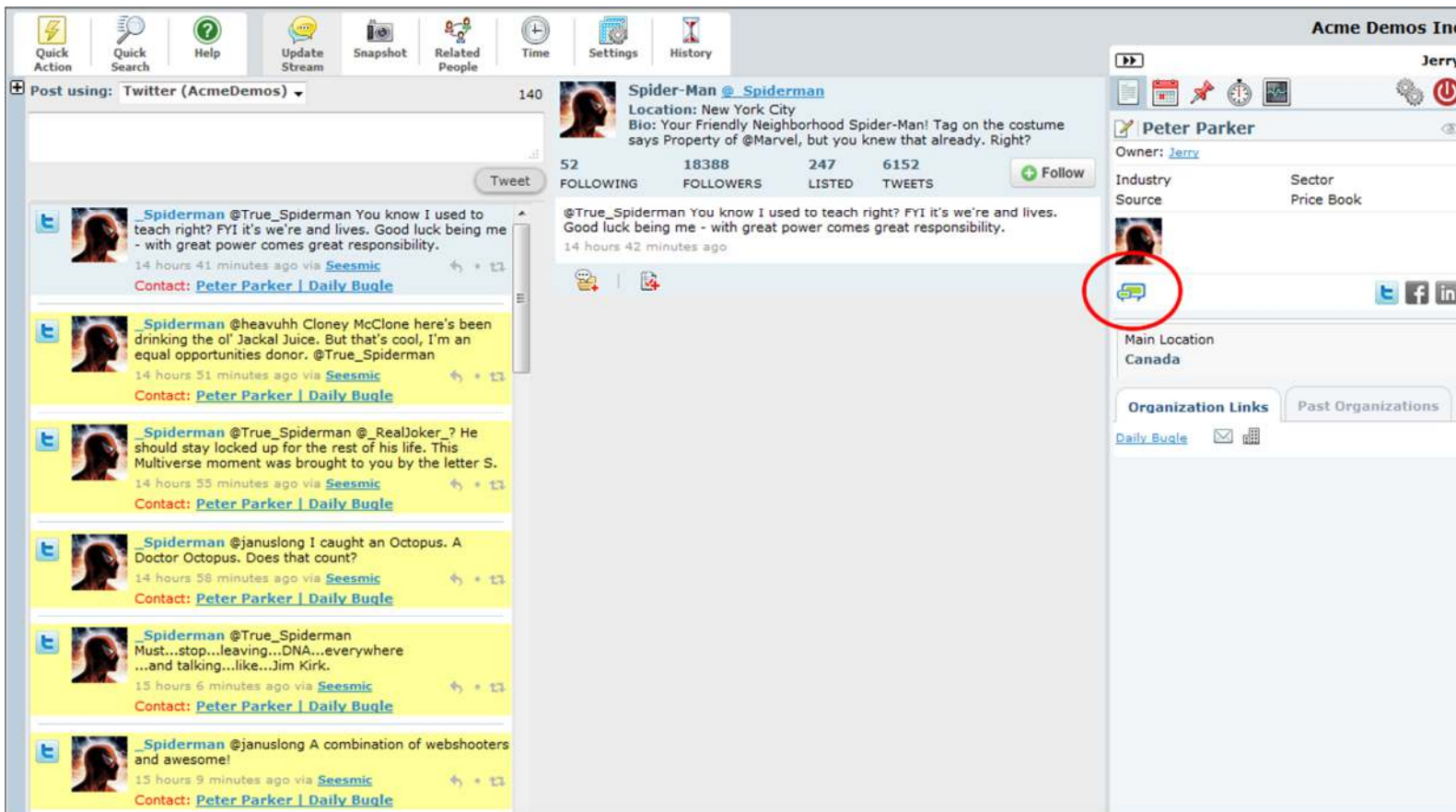
Sales Opportunities

Combines "Opportunity" keywords (typically the category of product you sell, or the need your service satisfies) with "Buying Signal" filters like "I

5.2 Lead and Contact Social Feeds

Another key benefit of connecting your BlueCamroo workspace to your social media accounts is the ability to view your contacts' social streams directly within their individual record. By ensuring you enter Twitter, Facebook and LinkedIn IDs for each contact, you will have access to their latest updates by simply clicking the Social Scout  button in the right panel of any record.

Moreover, any social updates you Save  are then held and available by selecting **Social Messages** from the record's left hand Explorer Bar options.



The screenshot displays the BlueCamroo interface for a contact named Peter Parker. The top navigation bar includes icons for Quick Action, Quick Search, Help, Update Stream, Snapshot, Related People, Time, Settings, and History. The main content area shows a social feed for Peter Parker (@Spiderman) with several tweets. The right-hand panel displays the contact's profile information, including their name, owner (Jerry), industry (Source), and sector (Price Book). A red circle highlights the Social Scout icon (a speech bubble with a magnifying glass) in the right panel, which is used to view the contact's social updates.

