



Quick Start User Guide

**Getting Started with Your New Social
Media Management Platform**

<http://checkpointmarketing.thomsonreuters.com.au>

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The Dashboard

Below are the main areas of your social media dashboard, for each area we have noted the section of the Quick Start Guide and the corresponding page.



Signing In

To **sign in** to the Checkpoint Marketing dashboard visit <http://checkpointmarketing.thomsonreuters.com.au>

Add your **(1) Username** and **(2) Password**. If you click **(3) Remember me?**, it will auto-fill your username and password next time you visit the page.

Please be aware that this will automatically log you in when you revisit social.checkpointmarketing.net, so be cautious when using this option on a public or shared computer.

Click **(4) Lost your Password?** to reset your password via the email linked to your account.

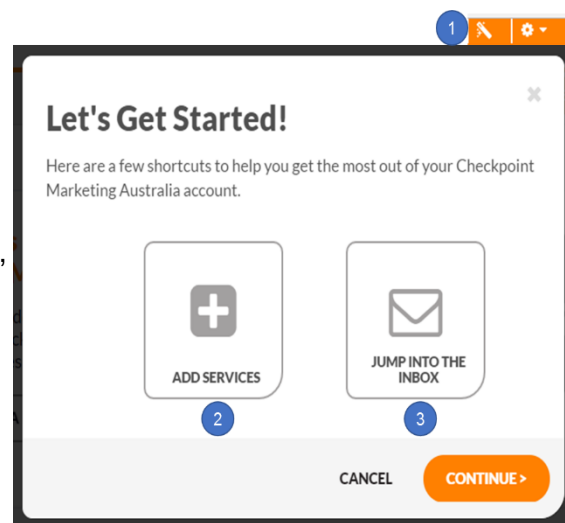
The image shows a screenshot of the Checkpoint Marketing login form. At the top, it displays 'THOMSON REUTERS CHECKPOINT™'. Below this, there are two input fields: 'Username/Email' and 'Password'. Under the 'Password' field, there is a checkbox for 'Remember me?' and a link for 'Lost your password?'. At the bottom of the form, there is a large yellow button labeled 'SIGN IN'.

Setup Wizard

Once logged in you will be able to use the **(1) Setup Wizard**, which can be found on the top right of your screen.

The Setup Wizard will take you through **(2) adding Services**, and going straight to your **(3) Priority Inbox**.

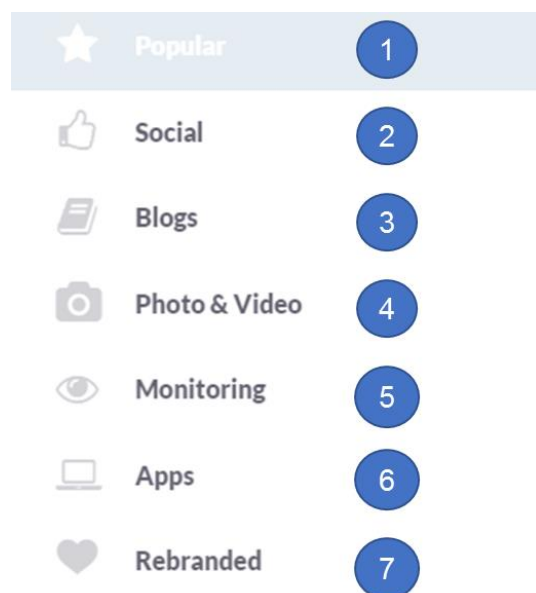
We will show you how to use these separate areas throughout this Quick Start Guide.



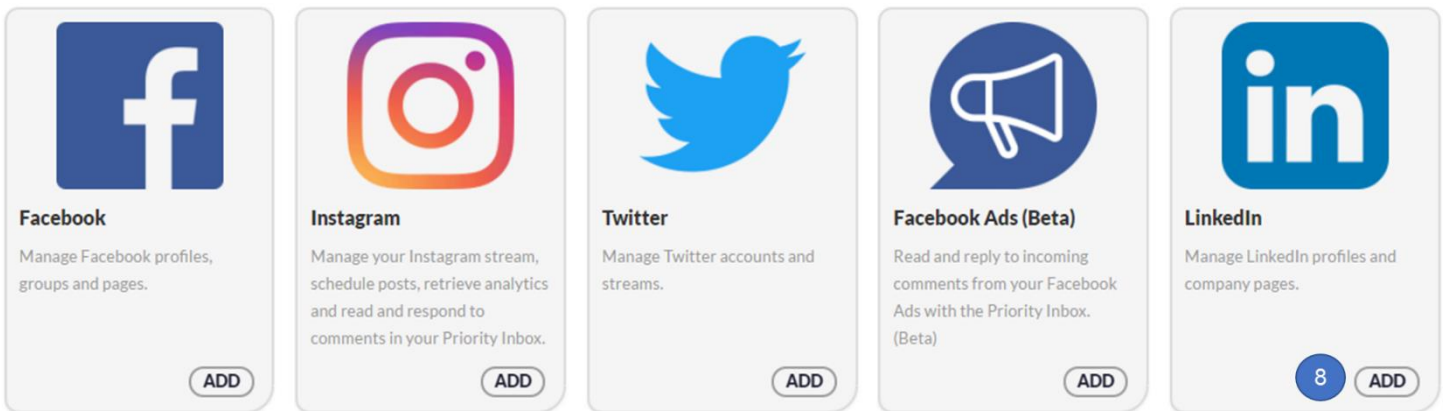
Services – Add Your Social Profiles

The Services area allows you to add your social media profiles and services to Checkpoint Marketing.

There are a number of **social media services** that you can add, these have been grouped for convenience. Choose from the most **(1) Popular** social media sites such as Facebook, Twitter, Instagram and LinkedIn or choose by area i.e. **(2) Social**, **(3) Blogs**, **(4) Photo & Video**, **(5) Monitoring** and **(6) Apps**. The **(7) Rebranded** category is not available.



To add a service, click the **(8) add button** on the service. You will then be prompted to enter the corresponding login details to authenticate with these social networks.



Service Lists – Group your social media services

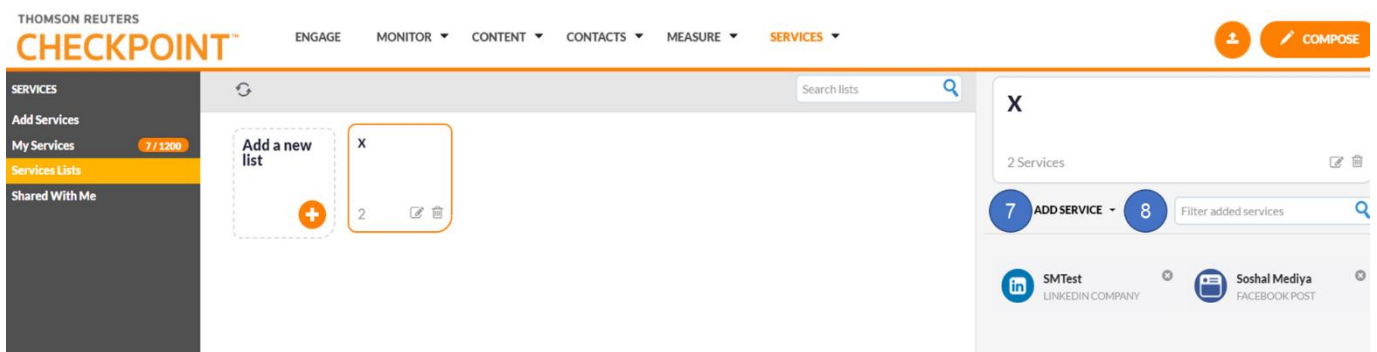
You can create service lists to post to multiple services at one time. Simply select the list when composing your message instead of individual posting services.

Click on **(1) Add a new list** to create a new list – IMAGE B.

Then (IMAGE A) add the **(2) List Name**, **(3) List Color**, **(4) Consumers** (users who can post to this list) and **(5) Contributors** (users who can add additional services to this list) and **(6) Create List**.

To add more services to your list, simply click **(7) Add Service**. To find services that have been already added to a list, simply **(8) search** for them.

Each created list can be viewed in the **Service Lists** section.



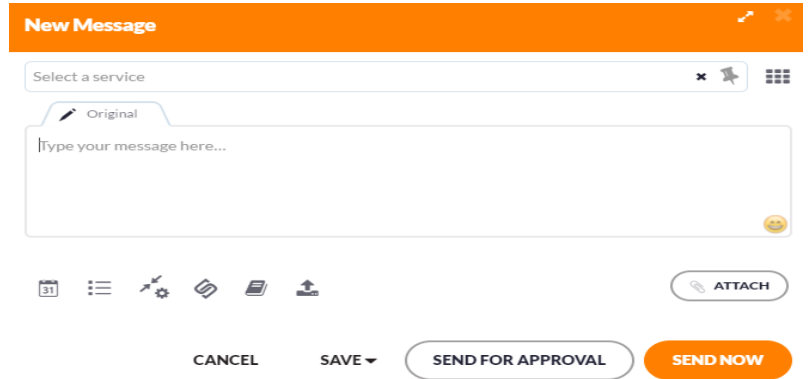
Composing Messages

You will find the **(1) Compose button** located at the top right of Checkpoint Marketing dashboard wherever you are.



Once the Compose button is clicked, a pop-up box will appear where you can start to **(2) compose your message**.

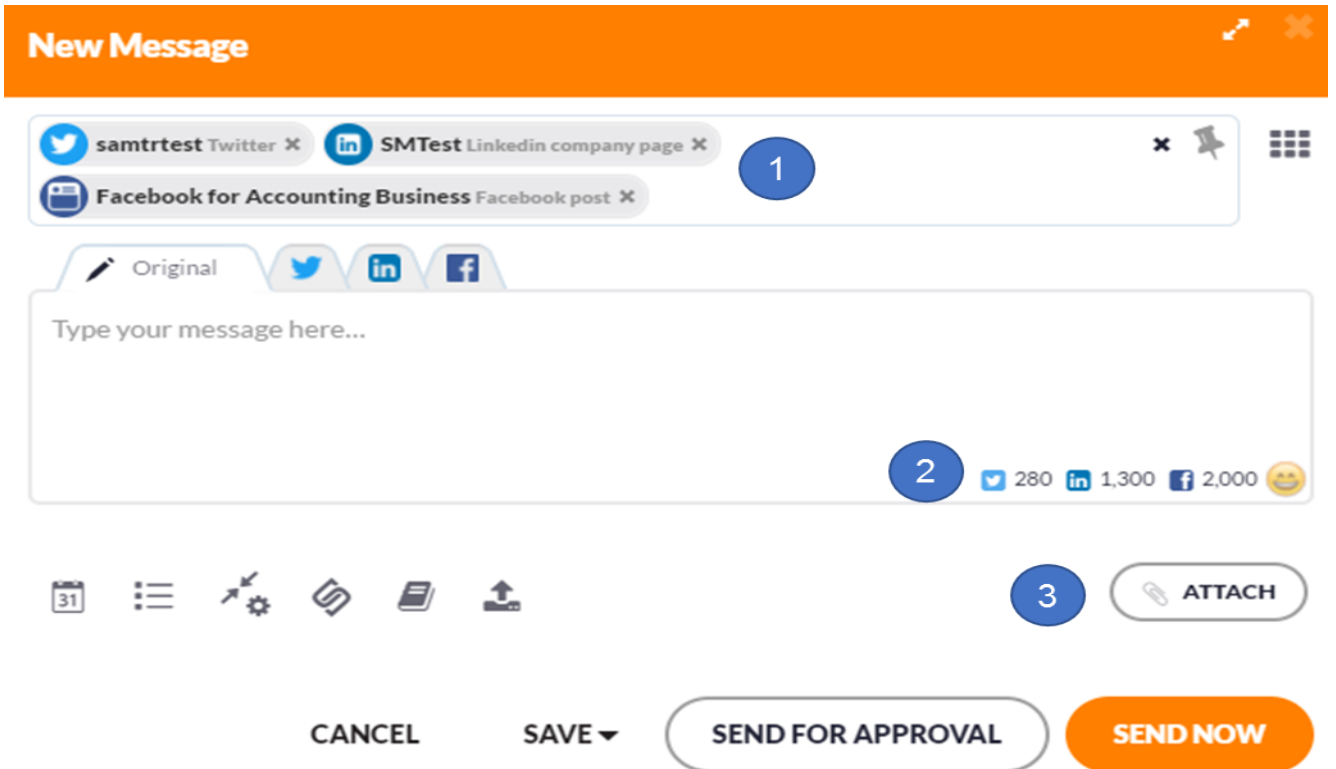
You can publish or schedule to one or more social media sites at the same time. It is also possible to save messages as drafts to review later.



Basic Messages

Select the **(1) service (social profile)** that you would like to post to, or multiple services if required. The **(2) character count** for that particular social network will appear if relevant.

Then, start composing your message. All URLs are automatically shortened and a preview will be shown. If you'd like to add additional content to your post (like an image or video), you can do this by clicking **(3) Attach**.



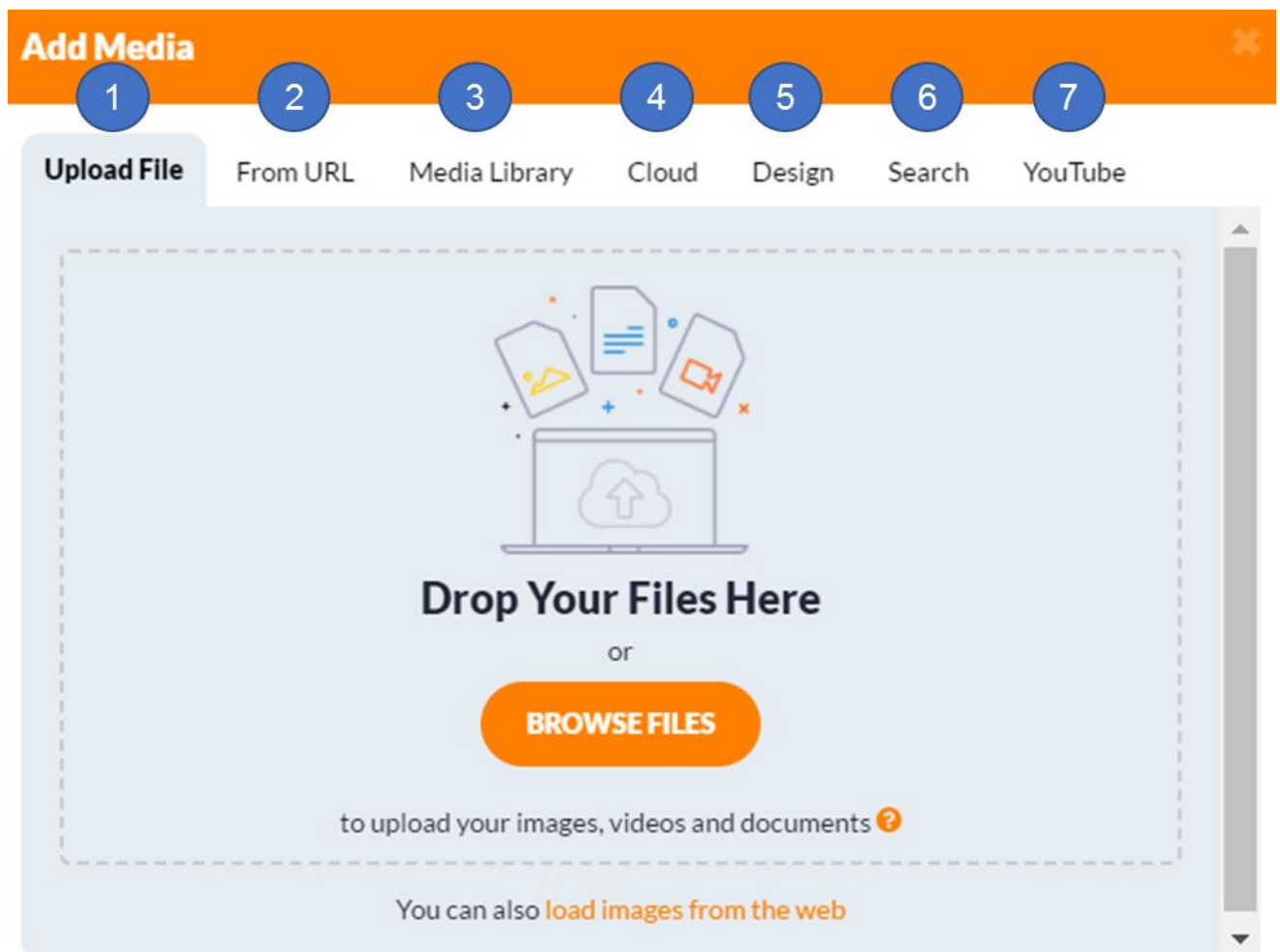
Adding Images & Videos to Your Messages

There are a number of ways in which you can attach a file to your social media posts.

It's possible to **(1) upload a file**, source an **(2) image from a URL** and choose content from your **(3) Media Library** or the **(4) Cloud** (e.g. Dropbox and Google Drive).

Checkpoint Marketing has also integrated with Canva, giving you a full **(5) design suite** to create a range of content assets such as Facebook covers, blog headers and Pinterest posts.

To further enhance your social media management, it's also possible to **(6) search for a royalty free image on Google and Flickr** or search for a **(7) YouTube video** without leaving the dashboard.



Scheduling Posts

You can **(1) schedule each post** by **(A) date**, **(B) time** or even the **(C) pre-calculated optimal time**. The Checkpoint Marketing's optimal time algorithm takes into account the optimal times for all services on a user account based on your best-performing content.

It is also possible to **(D) repeat your message** or add your message to a **(2) Queue** which allows you to randomize the repetition of multiple messages to avoid spamming.

All links in the compose box are automatically shortened with bit.ly. To improve tracking in Google Analytics, you can add **(3) custom URL parameters** to each URL. You can also add pop-ups to designated links with **(4) Snip.ly**.

If you get stuck for ideas, you can access your **(5) RSS Feeds, additional content and trending hashtags** directly from the compose box. For bigger campaigns, you might prefer to **(6) Bulk upload** your messages in a CSV file, with or without images instead of writing them individually.

New Message

🐦 samtrtest Twitter ✕
🌐 SMTTest LinkedIn company page ✕
✕ 📌
☰

📘 Facebook for Accounting Business Facebook post ✕

✍ Original
🐦
🌐
📘

Type your message here...

🐦 280
🌐 1,300
📘 2,000
😊

1
2
3
4
5
6

📅
☰
⚙
📄
📁
📤
📎 ATTACH

A
2018/03/01
B
📅
10
C
🕒
☑ REPEAT...
D

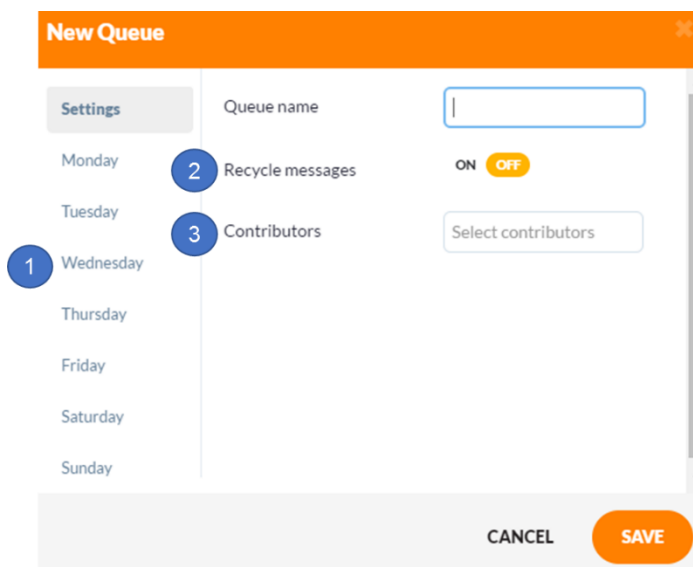
CANCEL
SAVE ▼
SEND FOR APPROVAL
SCHEDULE

Smart Queues

While in the compose box, you can add your social media messages to a **Queue** that allows you to **(1) publish them at set times throughout the week**. Queues are ideal for automatically publishing content that is not time sensitive.

By selecting to **(2) recycle messages**, your messages will be repeated until you delete them. We suggest that you only set a Queue on repeat if you will be regularly adding new messages to a Queue.

Multiple users can act as **(3) Contributors** and add posts to Queues they have access to.



RSS, Content & Trends

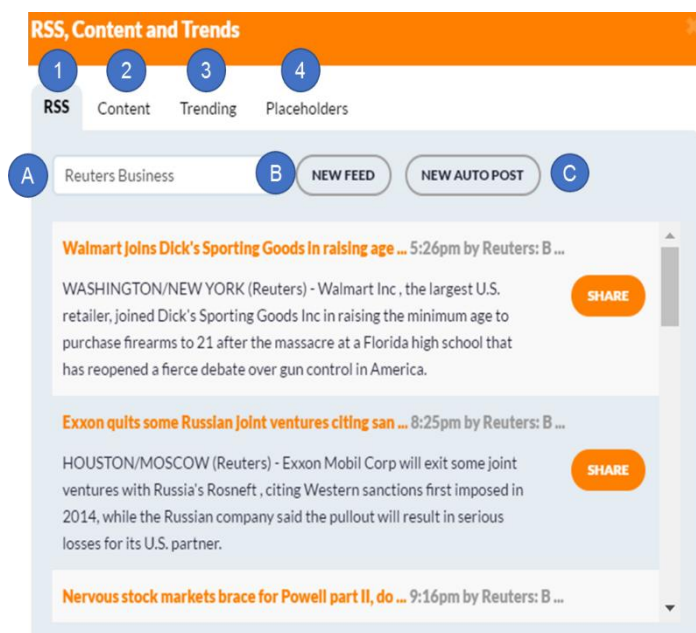
Content curation is made simple with the additional content features in Checkpoint Marketing's dashboard. Click **(1) RSS** to share content from an RSS feed.

Then, simply select your **(A) saved RSS feed** or **(B) add a new feed** to your account. The **(C) Auto Post** feature lets you automatically post new articles from an RSS feed.

If you have content in a **Content Library**, you can access it by clicking on **(2) Content**. This is where your team can save the best social media posts and other useful content you might have come across.

To see what's **(3) Trending**, select the appropriate city or region, then check for hashtags that you can use in your posts.

(4) Placeholders are used to personalize social media messages and email campaigns.

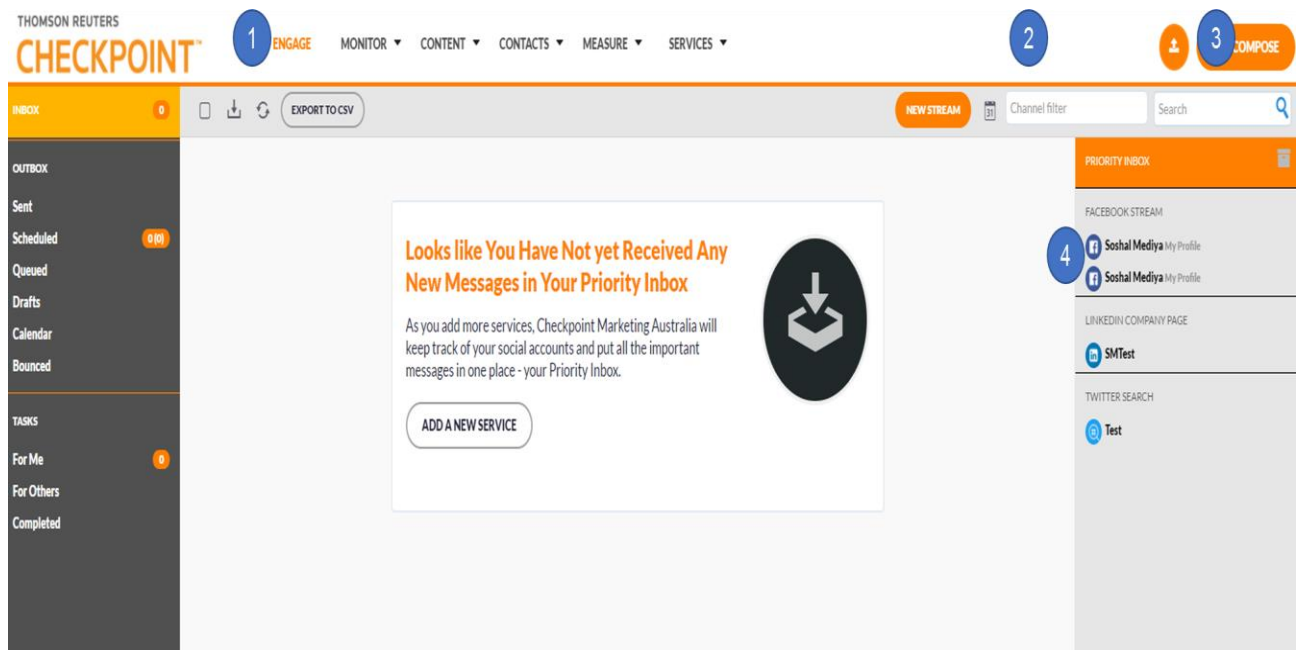


Engage – Interacting on your social media profiles

The **(1) Engage button** is available in the top menu of the dashboard, no matter which page you're on.

Your **Priority Inbox** collates all of your social media activity into one convenient stream, prioritizing the most important messages. **(2) Filter by social media channel** or use a **(3) manual search** to find specific messages and user profiles. You can also **(4) choose to view an individual stream in real-time** by selecting it from the right sidebar.

When replying to others directly from the Engage section, make sure to take note of the social network by the corresponding logo next to the profile name. **Use the Like, Retweet, Show Conversation, Repost, Reply, Translate, Archive, Assign and Reply** social engagement options that enable you to engage on your social media profiles directly from the dashboard.



Engage – Your Inbox, Outbox and Tasks

You will see this section on the left-hand side of your dashboard. Once you click on **(1) Inbox**, you will arrive at your Priority Inbox where you can engage with your followers and prospects.

The **(2) Outbox** section holds all of your sent and scheduled social media messages:

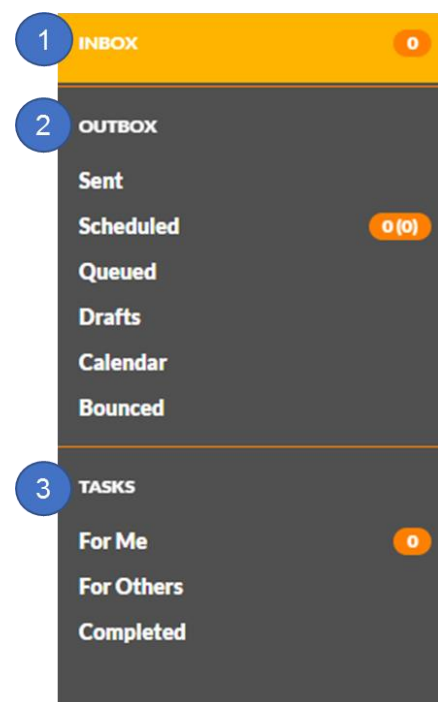
- **Sent:** Posts which have already been published.
- **Scheduled:** Full list of your scheduled posts.
- **Queued:** Full list of your queued posts.
- **Drafts:** All of your draft posts.
- **Calendar:** This interactive calendar displays your past and scheduled posts by day, week or month.

Each post can be drag and dropped to rearrange your schedule. Messages can be filtered by Scheduled, Queued, Sent, Team Member or Social Channel.

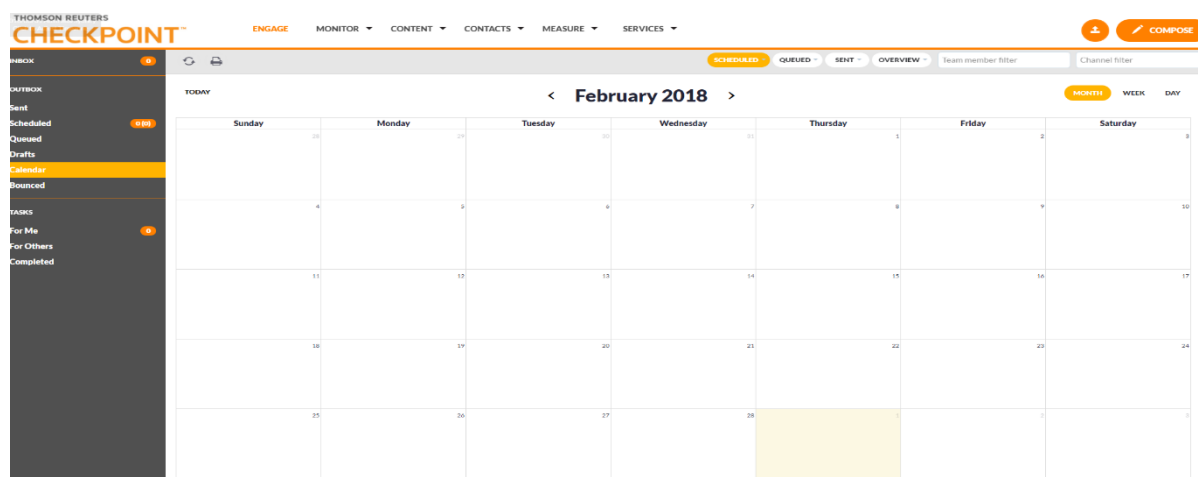
- **Bounced:** This is a list of posts that have bounced. Posts may not send if the connection was lost between the platform and the social media site, or if another issue prevented the social site from processing your post.

You can assign **(3) Tasks** to your team or other departments to boost efficiency. This area relates to messages that have been sent for approval and tasks that have been assigned:

- **For me:** Tasks assigned to you.
- **For others:** Tasks assigned to your team members by you.
- **Completed:** All completed tasks.



(* Calendar – month view



Monitor – Keyword and reputation monitoring

The **(1) Monitor section** allows you to monitor the “social web” for specific keywords, brand mentions, your target audience and competitors.

To set up a new term or series of terms to monitor, click **(2) New Monitor**. When you do, a pop-up box will appear, here you can choose whether you wish to monitor **(A) keywords** or **(B) review sites** for your business (see image below).

Once you have multiple monitoring streams set up, you can **(3) filter results by type** - micro blogs (social sites), blogs, news, videos and review sites or even positive, neutral or negative sentiment. You can also **(4) manually search** for user profiles or more keywords.

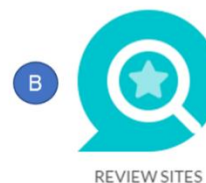
It is possible to edit the conditions of each monitoring stream at any given time. Simply click the **edit button** right next to your stream name and update it. Up to three monitoring streams can be viewed at the same time.

It is also possible to engage with mentions directly from the dashboard by using the **(4) social engagement buttons**. Here you can like posts, share, reply or set sentiment as negative or positive.

The next few pages provide instructions on how to set up a **(A) keywords monitoring stream** and a **(B) review sites monitoring stream**.

New Monitor

Add a new monitoring term or review site to your account.
 You can always manage them later from the Services tab.



OK, I'M DONE

Keywords

(1) Description: This is for your own reference.

(2) Has one of these terms: Your main keyword or phrase, this is a mandatory field.

(3) Has any of these terms (optional): an additional keyword that would also need to be included for the post to be brought through.

(4) Doesn't have these words (optional): Exclude entries containing particular keywords.

(5) Google Alerts Feed (optional): Add the URL to a Google Alerts Feed to enhance results.

(6) Only from this country: Choose whether to only show mentions from a specific country.

(7) Location (Longitude, Latitude and distance in miles) – narrow down results by location even further.

(8) Email notifications: Choose the frequency (daily, weekly) for receiving monitoring results via email.

(9) Send email notifications to: Add the email addresses you would like to send the alerts to (if selected).

(10) Save settings: Make sure to save your settings, you can amend your monitoring service at any time.

The screenshot shows the 'Keywords' configuration page with the following sections and callouts:

- 1 Description:** A text input field with the placeholder text "This is for your own reference."
- 2 Has one of these terms:** A text input field with instructions: "Results must contain at least one word or phrase entered into this field in order to be included. Separate each word or phrase by a comma. e.g. cola, orange juice, lemonade"
- 3 Has any of these words (optional):** A text input field with instructions: "Results must also contain one or more of the above words or phrases. Separate each word or phrase with a comma e.g. coffee, hot chocolate, tea"
- 4 Doesn't have these words (optional):** A text input field with instructions: "Exclude entries containing the keywords above. (Separate multiple keywords with a comma)"
- 5 Google Alerts Feed (optional):** A text input field with instructions: "Enhance your results by adding Google alerts feed, remember to include the http:// or https://"
- 6 Only from this country:** A dropdown menu currently set to "Any". Instructions: "Only show mentions from a specific country or location (only supported on Twitter). Select 'Any' if you want to search every monitoring social network and web results. Please note: Enabling this option will reduce the number of results. Test this using Twitter's advanced search to see the example of results you can expect."
- 7 Location:** A section containing a map of Europe with a red pin over London, and input fields for:
 - Longitude: -0.200071
 - Latitude: 51.639728
 - Within this distance (miles): 1000
- 8 Email notifications:** A dropdown menu currently set to "Never". Instructions: "Select whether or not to receive email notifications when new mentions are discovered."
- 9 Send email notifications to:** A large text area for email addresses. Instructions: "Separate multiple email addresses with commas."
- 10 SAVE SETTINGS** and **Cancel** buttons at the bottom.

Review Site Monitoring

Set up this service to simplify how you monitor feedback on various review sites.

First, enter the **(1) description** for your own reference. Then add the URL of your business page on each of the review websites you would like to monitor, including:

- **(2) Yelp Page**
- **(3) Trip Advisor Page**
- **(4) Glassdoor Company Page**
- **(5) City Search Page**

(6) Setup additional review sites: Yes/No

Checkpoint Marketing has partnered with ReviewPush to allow you to monitor even more review sites, including Google and Yahoo! Local.

Please note that this is a paid service and you should contact your administrator if you would like to enable it. Once you've setup your ReviewPush account, you will be able to add them to your dashboard.

(7) Send email notifications: Choose the frequency (daily, weekly) for receiving monitoring results via email.

(8) Send email notifications to: Add the email addresses you would like to send the alerts to (if selected).

(9) Save settings: Make sure to save your settings, you can amend your monitoring service at any time.

The screenshot shows a web form for setting up review site monitoring. It is divided into several sections, each with a numbered step indicator in a blue circle:

- 1 Description:** A text input field with a placeholder "This is for your own reference."
- 2 Yelp Page (optional):** A text input field with "http://" pre-filled.
- 3 Trip Advisor Page (optional):** A text input field with "http://" pre-filled.
- 4 Glassdoor Company Page (optional):** A text input field with "http://" pre-filled.
- 5 City Search Page (optional):** A text input field with "http://" pre-filled.
- 6 Setup additional review sites:** A dropdown menu currently set to "No". Below it is a note: "We've partnered with ReviewPush to allow you to monitor even more review sites in Example WL including Google & Yahoo! Local. Once you've Setup your ReviewPush account, select Yes to add your additional review sites to Example WL."
- 7 Send email notifications to:** A large text area for entering email addresses. Below it is the instruction: "Separate multiple email addresses with commas."
- 8 Email notifications:** A dropdown menu currently set to "Never". Below it is the instruction: "Select whether or not to receive email notifications when new mentions are discovered."
- 9 SAVE SETTINGS:** A button to save the configuration, with a "Cancel" button next to it.

Search – Real time search on Facebook & Twitter

This section enables you to **(1) search** for keywords and mentions in real-time on **(2) Facebook or Twitter**.

In the right sidebar are your **(3) recent searches** and **(4) trending hashtags**.

At the very bottom-right corner of the page is the **Word Cloud** that includes all of the most popular keywords currently trending.

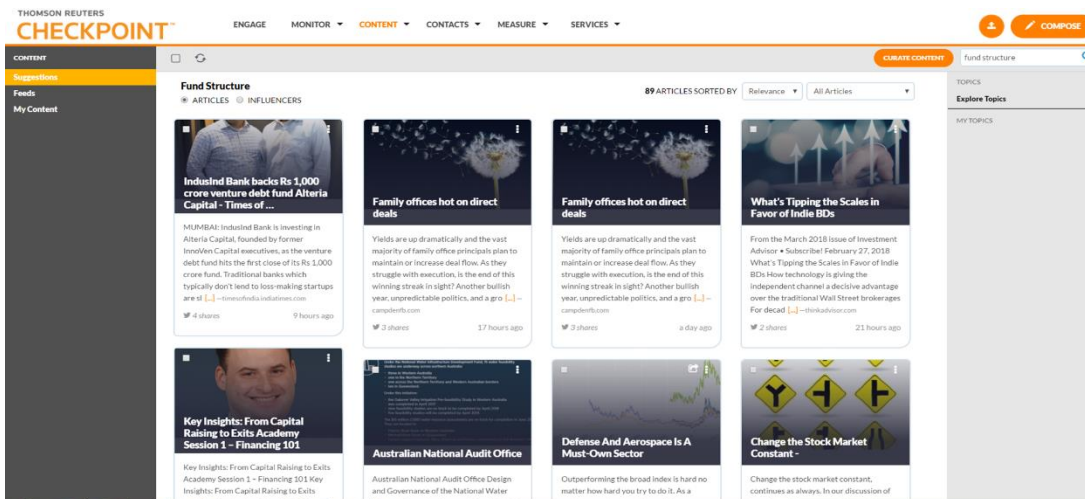
You can engage with your audience on your social media profiles directly from the dashboard by using the **social engagement buttons** (such as like, share and others).

The screenshot displays the Thomson Reuters Checkpoint dashboard. At the top, there are navigation tabs: ENGAGE, MONITOR (selected), CONTENT, CONTACTS, MEASURE, and SERVICES. A search bar at the top right contains the text 'capital gains' and is highlighted with a blue circle '2'. Below the search bar, there are tabs for 'FACEBOOK' and 'TWITTER', with 'TWITTER' selected and highlighted with a blue circle '3'. The main content area shows a list of tweets from Thursday, 1 March, with various users discussing capital gains tax and cryptocurrency. On the right sidebar, there is a 'RECENT SEARCHES' section with 'capital gains' listed, and a 'TRENDING' section with various hashtags like #WorldBookDay, #StDavidsDay, #FelizJueves, etc., highlighted with a blue circle '4'. A blue circle '1' is placed over the 'Search' button in the left sidebar.

Content – How to add new content

The **Content** section of the dashboard allows you to manage your content suggestions, RSS feeds and Content Libraries.

Content suggestions are similar to the real-time search within Monitoring in terms of functionality. Here you can search for topics and **filter them by Influencer, Relevance or Top Articles**.



The **Feeds** section makes life more convenient if you are used to using RSS feeds. Simply add a **New Feed** and receive all the latest news and blogs in your dashboard.

If you want to share a particular RSS feed (e.g your own), you can set up an **Auto Post**. With this option, you can choose to automatically share content, including their frequency and amount. It's possible to publish posts automatically, queue or save them as drafts.

Your content library rests in the **My Content** section. Here you can add messages that you have written or already published (via compose box). You can also save articles to read or work on later.

Measure

The measure section allows you to measure the impact of your social media activities. For quick insights you can use the **(1) Engagement Report** and for deeper insights, you can **(2) build your own bespoke reports**. It is also possible to **(3) download raw data** in CSV or HTML.

The screenshot displays the Thomson Reuters Checkpoint Measure interface. At the top, the navigation bar includes 'THOMSON REUTERS CHECKPOINT™' and menu items: 'ENGAGE', 'MONITOR', 'CONTENT', 'CONTACTS', 'MEASURE', and 'SERVICES'. A 'COMPOSE' button is visible in the top right. The left sidebar, labeled 'REPORTS HUB', lists various report types: 'Engagement' (highlighted with a blue circle and the number 1), 'Facebook Page', 'Twitter', 'Instagram', 'Google+', 'LinkedIn', 'Monitoring', 'YouTube', and 'Google Analytics'. Below this, 'My Reports' is shown with a notification badge (2), and 'Report Builder' and 'Download Data' are listed with a blue circle and the number 3. The main content area is titled 'Engagement Report' and includes a 'GENERATE REPORT' button and a 'Select account' dropdown. The report period is set to '15 February 2018 - 1 March 2018'. The 'Engagement Overview' section features five metrics: Audience (0), Post Engagements (0), Posts Sent (0), and Mentions (0), each with a '0 Last Period' label. A 'REPORT CHEAT SHEET' link is also present. The bottom of the page shows the start of an 'Audience Growth' section.

Report Builder – Overview

In **Report Builder** you can view and create custom branded reports to suit the requirements of your business.

(A) Add new modules to existing report

- Modules include a range of reporting metrics (e.g., audience growth, content habits), integration with Google Analytics, and social media channel filtering.

(B) Report sharing with other users on Social Media Manager

(C) Report sharing options:

- **Print:** print the report.
- **Email:** send your report to others on a daily, monthly or quarterly basis.
- **Live:** enables you to share the report via a URL.

(D) Create a New Report

(E) Personalize your report by adding your logo and contact details.

The screenshot displays the Thomson Reuters Checkpoint Report Builder interface. The top navigation bar includes 'ENGAGE', 'MONITOR', 'CONTENT', 'CONTACTS', 'MEASURE', and 'SERVICES'. The main area shows a report titled 'Audience Growth' with a line chart titled 'AUDIENCE GROWTH BY DAY' and 'AUDIENCE SIZE'. The chart shows a fluctuating line with a peak around 15,400 and a trough around 15,300. The interface also includes a 'Cover Page' section with a koala image and a 'Test Page' section with a rich text editor. The bottom left corner of the screenshot has a redacted area.

How to create new report

Click **(D) New Report** on the right-hand side of the dashboard to create a new report.

(1) Enter your report details: Report Name, Report Title and Default Time Period (this can be edited after the report is set up).

(2) Select the layout of your report.

The screenshot shows the 'New Report' setup interface. Step 1, 'Report Name', includes a text input for 'Report Name' (with a note 'This is for your own reference.'), a text input for 'Report Title' (with a note 'This title will appear on your report.'), and a 'Default Period' section with radio buttons for 'LAST 7 DAYS', 'LAST 14 DAYS', 'LAST 30 DAYS' (which is selected and highlighted in orange), and 'LAST 90 DAYS'. Step 2, 'Choose a layout', displays four layout options: '1 Column', '2 Columns', '1-2 Columns', and '1-2-1 Columns'.

Once your new report has been set-up, **(3) add modules** – the metrics that you would like to report on (additional modules can be added at any time).

The screenshot shows the 'Add Modules' screen. At the top, there is a blue header with the number '3' and the text 'Add Modules'. Below the header, there are tabs for 'General Reports', 'Channels', 'Monitoring', 'Links', 'Campaigns', and 'Google Analytics'. A search bar labeled 'Filter modules' is present. A list of modules is displayed, each with an icon, a title, a description, and an orange plus sign button to add it:

- Activity Overview**: Summary of engagement, audience, mentions and message volume across all your social accounts.
- Audience Growth**: Audience growth across all your connect social profiles.
- Content Habits**: Overview of posting habits across all your connected social profiles.
- Email Statistics**: Email open rates.
- Engaged Users**: Most engaged audience members across all your connected social profiles.

Export — Export data for further analysis

Here you can export data for **(B) Campaigns, Channels, Monitoring, Contacts, Users and Other** for further analysis.

Take note that all data is stored for 90 days on your social media management dashboard. If you prefer to keep your analytics data for longer, you must **(3) export data in (B) HTML or CSV format** for each individual month.

This gives you the ability to compare results on a quarterly and annual basis.

The screenshot displays the THOMSON REUTERS CHECKPOINT™ dashboard. The top navigation bar includes 'ENGAGE', 'MONITOR', 'CONTENT', 'CONTACTS', 'MEASURE', and 'SERVICES'. The left sidebar lists various reports and analytics tools, with 'Download Data' highlighted in yellow and labeled '3'. The main content area is titled 'Export' and features a horizontal tabbed interface with tabs for 'Campaigns', 'Channels', 'Monitoring', 'Contacts', 'Users', and 'Other'. The 'Scheduled Messages' row is highlighted with a blue box labeled 'B', showing 'HTML', 'CSV', and 'EXPORT' buttons. Other rows include 'Sent Messages', 'Drafts', 'Received', 'Clicks', 'Message Statistics', 'Bounced Messages', and 'Team Statistics', each with similar export options. The 'My Reports' and 'Report Builder' options in the sidebar are labeled '1' and '2' respectively.

Preferences – Control your Settings and Preferences

You can view a high level overview of your account information in **(*) Preferences**. To access this area, click on the cog icon at the top right corner of the dashboard (see page 4). Then click on Preferences, just under Settings.

Here you can view and edit your **(1) Contact and Location Information**, as well as choose whether to receive desktop **(2) Notifications** or not.

You can choose how to shorten your links and set your **(3) Publishing Preferences**. To reset your cache and change your security question go to **(4) System Settings**.

Once you have made the adjustments, make sure that you click **Save** on each section to save the changes you have made.

THOMSON REUTERS CHECKPOINT™ ENGAGE MONITOR CONTENT CONTACTS MEASURE SERVICES

SETTINGS
 Preferences

CONTACT INFORMATION

Name or company: Ghaleon Ong
 Email: ghaleon.org@thomsonreuters.com
 Username: ghaleon.org
 Password: [Reset password](#)

LOCATION INFORMATION

Time zone: Australia
 (GMT+11:00) Australia - Melbourne
 Language: English : English
 Clock format: 12 - hour

URL Shortening

Default URL shortener: bit.ly [RESET CACHE](#)
 bit.ly Login: ong.ghaleon
 bit.ly Key: *****
 bitly pro domain (optional): If you're using a custom domain, enter it here
[locate your bit.ly details here under legacy API key](#)

System Cache [RESET CACHE](#)

Security Settings

Reset my session every: 2 days
 Security question: None
 Valid IP addresses: IP addresses

PUBLISHING

Twitter retweet behaviour: [RETWEET NATIVELY](#) [RETWEET AS YOUR OWN](#)
 Rich text editor: Automatic
 Pause scheduled messages: ON [OFF](#)
 Default filter: My user
 Strip links from post body: [ON](#) [OFF](#)

PREFERENCES

- Personal Settings 1
- Notification Settings 2
- Publishing Preferences 3
- System Settings 4

<http://checkpointmarketing.thomsonreuters.com.au>

THOMSON REUTERS
CHECKPOINT™

Thomson Reuters – Checkpoint Marketing

1800 074 333

smm.anz@thomsonreuters.com