

What is the difference between a Freemium account and a Premium account?

	Freemium	Premium
	1 user	Unlimited Users
	5 searches	Unlimited Searches
	1K results	Starting at 10K results
Geography-based Filtering		√
Language-based Filtering		√
Real Time Alerts		√
Workflow (CRM)		√
Ability to Customize Sentiment Dictionaries		√
Advanced Boolean in Searches		√

Account Management

I can't log in to my account.

1. Are you logging in to the correct URL with the correct username and most up-to-date password?
2. Clear the cache on your browser, or try a different one
3. If so, and you're still unable to log in, contact support@techrify.com with a request to reset your password.

Note: If you are a Freemium user, you'll need to use the password retrieval option available on the login page.

What happens when I reach the results limit in my account?

Your searches will be paused and an email alert will be sent your way. At that point, you can take two courses. First, you can contact sales@techrify.com to upgrade your results limit. Alternatively, you can clear results in a selected profile, re-run your searches for a more focused window of time, or just delete unwanted profiles altogether. Once your account has room again, your searches will resume right where they left off.



Search Setup

What is the difference between basic and advanced searches?

Advanced searches allow the use of full Boolean, BUT you sacrifice the ability to mine data from message boards and forums. Advanced searches may also run slower, since SM2 takes longer to parse the more complex search string. If you choose to use advanced searches, you can learn more about our Boolean capabilities by clicking the question mark icon next to the Advanced option in Step 2 of the search wizard.

Recommendation: Utilize basic searches as much as possible. Break complex searches down into a series of basic searches. Then, organize the searches into categories for clean, comprehensive presentation.

To create this type of category:

1. Setup | Manage Categories
2. Create a new category.

Tip: Preface the category name with "All" to differentiate it from searches in some menus.

3. Search Setup
4. Create a new search using the New Search wizard. On step 4, select the category you just created.

If you already have results in your profile and want to add it to a category created this way, you will need to clear those results and re-run the search in order for the results to be properly categorized.

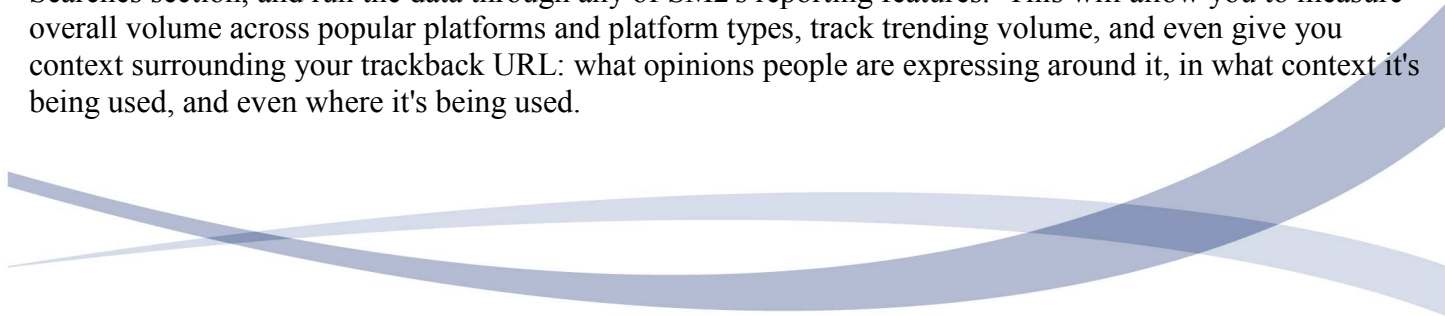
Can I enter multiple searches at once in the New Search wizard?

Yes, you can, if your search is a basic one (Boolean operators are either not present or limited to "and"). Make sure that each search is separated by a hard return (hit Enter or Return on your keyboard) and that you have all your Boolean in place. You can also copy a list of words out of Excel and paste them into the search wizard- Excel automatically separates each cell with a hard return. If you copy and paste out of a Word file, keep in mind that quote marks in certain fonts may not be recognized by SM2. If this happens, the search will return unexpected results.

Note: If selecting a category on step 4 of Search Setup, the user should only enter multiple searches that will be going into the same category at once.

Can I track trackbacks?

We do offer the ability to analyze trackbacks by classifying a search as such in step 1 of the New Search wizard. You can then isolate the trackback results using the orange Filter bar, select your URL from the My Searches section, and run the data through any of SM2's reporting features. This will allow you to measure overall volume across popular platforms and platform types, track trending volume, and even give you context surrounding your trackback URL: what opinions people are expressing around it, in what context it's being used, and even where it's being used.

A decorative graphic at the bottom of the page consisting of several overlapping, wavy, light blue shapes that create a sense of movement and depth.

Why choose to classify the searches as a specific Type in the first step of a New Search wizard? What difference does it make?

Organizing your keywords amongst the various Types allows you to view them in one-click reports in the Share of Voice Report. In the New Search wizard, there are groupings of Types (one has Company, Competitor, and Partner) that provide SM2 with the information to populate the charts when Companies or Products are selected.

What if I didn't set up my searches the first time exactly like I wanted them?

It's very easy to edit each search. Use the icon on the left of each keyword search in Search Setup. If you're only editing Step 1 (classifying the search as a product, company, etc), the change will be effective immediately. All other changes will apply only to future search results. To apply changes to search phrasing, location, date, or language filters, you will need to clear all current results and reset the dates under Setup | Clear Results before rerunning your searches. If you plan on making lots of drastic changes, it may be best to delete the profile and create a new one, starting from scratch.

How do I extend my searches' time window further into the past?

You'll need to edit the date ranges set for each individual search under Search Setup by clicking the pencil and paper icon on the left. The next time your searches run, you may notice them taking longer to complete, since SM2 is filling in the new time frame.


Searches

Why aren't my searches moving? I started them hours ago and haven't seen any results yet.

If you have just finished entering searches and want them to run now, you must click Run Searches Now in Search Setup. You can view the exact progress of your search under Setup | Running/Completed by clicking Progress next to the search. You may also select specific searches to run rather than selecting all searches to run (the default setting). If you have already initiated your search, there are a few things that could cause slowness. If this is the first time you're running a search on new keywords, it may be several hours before the search completes, since SM2 is evaluating results from the entire Social Media Warehouse.

1. Check to see if multiple jobs are running under Setup | Running/Completed. Most commonly, there are too many jobs (searches, deleting results, building Theme charts, etc) running at once. If there are two jobs running at the same time, cancel one. Think of this as trying to run hundreds of programs on your computer at full blast, all at once; something is bound to start dragging down. Cancelling all jobs but the one you'd like to continue running (your search) will free up resources and drastically improve the speed at which results populate your profile.

The use of complex advanced searches, country and language filters, and just plain huge search terms (like Apple) can all cause your search to look like it's not moving. If you are unable to cancel your searches to edit and re-run them, email us at support@techrigy.com

A decorative graphic at the bottom of the page consisting of several overlapping, wavy, light blue shapes that create a sense of motion and depth.

My search isn't gathering search results to the present date.

If you intended to have an ongoing search, check under Search Setup and see if a date has been entered in the second date range field (To). It needs to be left blank for the search to continue to gather data each day. To change this, delete the date from that field and save the changes you've made to your search.

Another possible cause for your searches to stop running is that you have reached capacity on the number of results your account can use. Check your main Profiles page to view this information. You or a member of your team should have also received an email when the limit was reached.

How often are results updated?

SM2 harvests data continuously from our source base, which is also expanding at a steady rate. This data is stored in our Social Media Warehouse, which contains social media data all the way back through October 2007.

You can adjust how frequently results are then pulled into your profiles under Setup | Schedule. We offer the option of running your searches daily, weekly, and monthly, but you can also manually start a search at any time under Search Setup. Select the ones you'd like to run and click Run Searches Now.

Custom Sources

If SM2 isn't tracking a source I want to see, can I add it?

Yes. Under Setup | Custom Sources, you can add the URLs for sites you'd like to track. The sites must have an RSS feed, but if they don't, you can use free online tools such as Yahoo! Pipes to create "fake" ones. You can configure SM2 to grab anything and everything from your sites (the default setting), or you can configure it to filter only for content containing your search terms (Setup | Custom Sources | Configure button). You can also use the Configure option to change the frequency of your search. To stop searching a site, delete it from your list of Custom Sources. Please keep in mind that turning off your regular SM2 social media search will not turn off your custom source search! Also, because we grab only what's currently in your sites' RSS feeds, you will not be able to see a full historical view of data for most sources.

I configured my custom sources to filter results by my search terms, but I'm still seeing anything and everything from the site.

Do your searches use advanced Boolean (anything beyond "and")? At this time, the Configure options are not available for advanced searches. You can, however, break your advanced search down into a series of basic searches and use Categories to organize them (Setup | Manage Categories | Create new category, Search Setup | Create new search | Select your category on Step 4 of the New Search wizard).



How do I set up a profile that only tracks results from sources I want to see?

There's a very simple way to do this in a new profile.

1. Enter your sources under Setup | Custom Sources. If your source does not have an RSS feed, you can use tools such as Yahoo Pipes to create a "fake" one. For Twitter, create feeds at www.search.twitter.com for your specific keywords.
2. Configure your custom sources to filter by search term (Setup | Custom Sources | Configure button)
3. Under Search Setup, create your searches. (If tracking only Twitter, be sure to use the same keywords you used in the search.twitter.com feeds)
4. Under Setup | Schedule, set your daily search to Do Not Run.

Your custom sources will continue running once a day, and all incoming results from the feeds will be assigned to the proper search term. Because you are relying solely upon custom sources, you will not have access to full historical data; SM2 will only grab what is currently in their RSS feeds along with anything else they post there.

Do you grab product and service reviews from places like TripAdvisor and Yelp?

We do get content from some of these sites in our standard index, but others we don't automatically crawl. We're a fair player; if a site's Terms of Use asks not to be crawled, we'll abide by their policy. However, many of those publishers do offer an RSS feed that you can add as a custom source (Setup | Custom Sources) to capture the reviews you want to see. Remember, if you add a custom source, you'll need to decide whether to configure SM2 to pull in everything from the feed or just items containing your search terms (Setup | Custom Sources | Configure button).

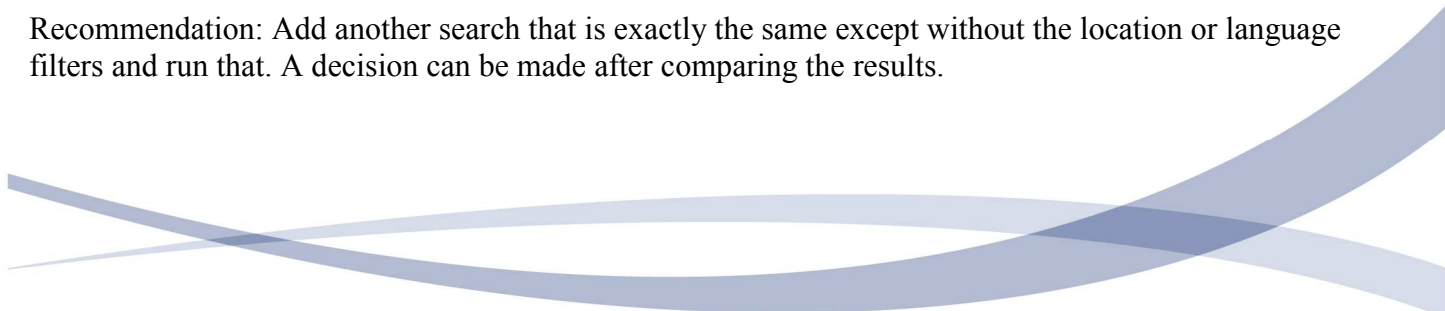
Filters (Missing Results)

Why is my search returning so few results when I know that there should be many more?

Did you apply search filters when you set up the searches? Under Search Setup, edit the search to see if any country/language filters have been used. Have you accidentally blocked a major source? Check under Setup | Filter | Blacklist. You can also look under Setup | Filters to view exactly what SM2 is filtering from your results and why.

Recommendation: Try not to use location filters unless there is a specific reason to do so. We collect these user demographics based on a variety of factors. If these factors are not present (i.e. a site has not provided their location, a blog has chosen to mask their location), it won't get pulled into your results. Language filters are more flexible; we use natural language processing to analyze the main content of the page, measuring the percentage of common words in a variety of languages.

Recommendation: Add another search that is exactly the same except without the location or language filters and run that. A decision can be made after comparing the results.

A decorative graphic at the bottom of the page consisting of several overlapping, wavy, light blue shapes that create a sense of movement and depth.

I saw a result in my Filter list that I want in my results. Can I move it?

Absolutely. There are a few ways to approach this.

If the result was filtered because of an exclusion, location filter, or language filter you entered during Search Setup, you can move the filtered result. Keep in mind that removing the filter will allow all other results held back by that filter to also enter your profile! Under Setup | Filters, use the menus to view the results blocked as either Filter or Exclude. If you decide to remove the filter, here are the steps:

1. Clear all results in your profile (Setup | Clear Results | Clear all results)
2. Go to Search Setup and edit each of your searches. Remove the offending filter, save your searches.
3. Re-run your searches, or wait for the automatic daily search to run.

If the result was filtered because you added the source to your Blacklist, you can move it. You will then receive all other relevant results from that source.

Here's how:

1. Remove the source from your Blacklist (Setup | Filters | Blacklist tab)
2. Reset the window of time SM2 will look at during its next search (Setup | Clear Results | Reset Dates). This may cause the search to run longer than usual, since SM2 is looking through more data than it usually does on a day to day basis.
3. Either run your searches (Search Setup | Run searches now) or wait for the automatic daily search to run.

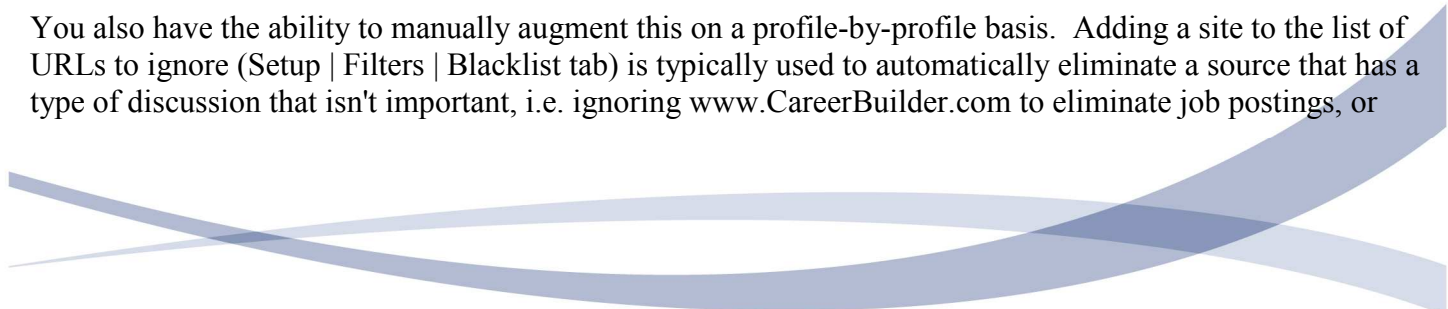
If the result was filtered by SM2's automatic spam filter, you can restore the source by adding it to your Whitelist. To do this, simply check the box next to a result from the source you'd like removed from the spam filter, and select the Restore button on the main Filters tab. Keep in mind that the Whitelist will not override your search filters; so, only results matching your specified location or language filters will be restored. The more results there are for a source, the longer this action may take. You can view and edit your Whitelist by clicking the tab under Setup | Filters.

Unwanted Results

How can I keep spam out of my profiles?

We have a proprietary, automated engine for identifying spam content. It looks for common traits and techniques used by mirror sites and spam sources, which can include flagging sites that publish an extremely high number of web pages, link farming, keyword stuffing and scraping, and aggregating a high volume of third party content. View results that have been filtered out of your profile under Setup | Filters.

You also have the ability to manually augment this on a profile-by-profile basis. Adding a site to the list of URLs to ignore (Setup | Filters | Blacklist tab) is typically used to automatically eliminate a source that has a type of discussion that isn't important, i.e. ignoring www.CareerBuilder.com to eliminate job postings, or

A decorative graphic at the bottom of the page consisting of several overlapping, wavy blue lines that create a sense of movement and depth.

ignoring your own company Twitter account by adding www.twitter.com/your_username. You can then go to View Results and delete any results from that source using the grey search bar and drop down menus.

You can also mark a result as spam in View Results using the trashcan icon to the right. This will remove all other results from that source that are currently in your profile, and will filter out any future results from that source. Marking a result as spam in View Results can also improve the intelligence of our spam filtering over time. We regularly review and audit user identified spam to update our internal blacklist and to fine tune the spam filtering engine to more effectively identify junk; spam generation is constantly changing.

Visit <http://training.techrigy.com/> to view a 15 minute video tutorial on spam identification and removal using some of SM2's reports.

What is the difference between deleting, clearing, and marking a result as spam?

Marking a result as spam will clear out all other results from that source currently in your profile and prevent any future results from populating your profile. You'll notice the URL will then be added to your Blacklist (Setup | Filter | Blacklist tab). Deleting a result removes that one particular result (i.e. just that one article, tweet or blog post) from your profile and prevents it from coming in again on any future searches. Clearing results (Setup | Clear Results) allows you to wipe the slate clean and make room in your profile. A cleared result may be found on a future search. You can clear all results at once, or focus your efforts by search term, category, and time range.

If you accidentally mark a source as spam, you'll need to remove the URL from your Blacklist, reset the dates SM2 is searching (Setup | Clear Results | Reset Dates), and re-run your searches to repopulate the results from that source. If you accidentally delete a result, you'll need to either manually add it as a custom result (Setup | Custom Sources | Add Result) or create a new copy profile and re-run your searches there. If you accidentally clear results, reset the dates (Setup | Clear Results | Reset Dates) and re-run your searches.

What if I deleted all of my results? Can I get them back?

If you accidentally delete results in a profile, you can restore the result to your profile.

1. Go to Setup | Filters and remove the URL from your Blacklist.
2. Under Setup | Clear Results, reset dates.
3. In Search Setup, click Run Searches Now or wait for your automatic daily search to run.

Can I retrieve a profile after I deleted it?

Unfortunately, you cannot restore a profile after it has been deleted.



Sources

Can you grab comments?

We have partnered with a number of data providers to give you the ability to view comments in your results. A comment must contain one of your search terms in order for it to appear in your results.

Gathering comments is an ongoing development, and the Internet is constantly growing, so we may not catch all of them. If this happens, you can add the comments as a Custom Result under Setup | Custom Sources | Add Result.

Do you cover Mainstream Media sources?

SM2 tries to focus on social media, which is mainly user generated rather than mainstream. We do pull in the social media aspects of some mainstream news sources, but coverage is light. In some cases, you can add a source as a Custom Source under Setup | Custom Source | Add Source. However, the source must have an RSS feed for this to be affective. If an RSS feed is not present, use a feed generator to create a “fake” one.

Why doesn't the Map Overlay report have the same number of results as the total number returned by the search?

Not all of the search results specify the physical location so SM2 cannot map those. See this explanation for why a search may be returning so few results [[link to question above](#)] for further details.

Blocking Sources, Sites, URL's, etc

Can I block our company's internal sites/Twitter account/Flickr stream?

Yes. Add the desired URL to your Blacklist under Setup | Filters | clicking the Blacklist tab. You can block the entire site (for example, www.twitter.com) or a specific user (www.twitter.com/techrigy). Some sites require you to enter their URL a specific way to block the entire source. For example, Craigslist sites have a location at the beginning of the URL. To block sites like these, enter the main part of the URL surrounded by periods (.craigslist.org).

If you'd like to block all conversation surrounding a Twitter account, you can also add both the UserName and @UserName as Global Excludes in Search Setup.

To clear out any results from this source already in your profile, go to View Results, clear all filters in the orange Filter bar, and use the gray Search bar to search for the URL. Select all results that come up and delete using the drop down menu in the grey Actions menu.



Categories

What are categories?

Categories provide a way for you to organize your results. You can think of them as a search within your overall bucket of results. Another way of thinking about categories: if you use email folders and filtering, Categories are your folders (or labels in Gmail), and Category Rules are your filters. See <http://training.techrigy.com> for more information.

Why would I want to create categories?

- a. For reporting & deeper analysis. Each category can be analyzed across all of the reports in SM2.
- b. Create a subset of data on a specific topic/trend using category rules. For example, you can search for Apple and separate off results discussing iTunes into a category. Or, you can isolate results that talk about a particular aspect of your business (dirty towels at a hotel, stale food from a restaurant chain, etc).
- c. Create a grouping of search results (a total) for reporting. This is especially useful when you have multiple searches tracking spelling and punctuation variations. For example, searches for My Coffee Shop and My Coffee Shoppe can be linked into the category All results – My brand.

Why are the categories still in the filter drop down menu even though I have deleted the search terms or the category rule?

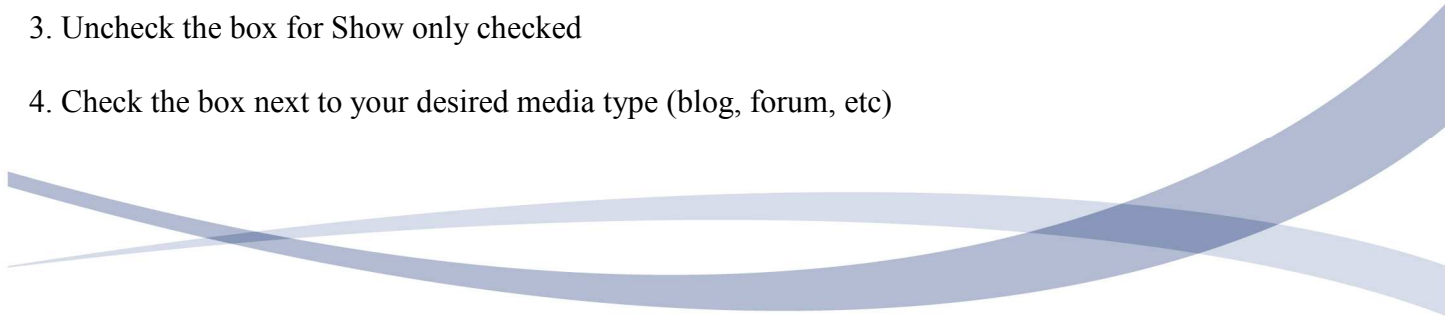
Categories are edited separately from the searches and rules. You'll need to delete it manually under Setup | Manage Categories.

What is the Media Types - Other category?

Just like with the location filters and language filters, there are instances when SM2 can't classify a result into a specific category. In the case of results found in "Media Types - Other," the tool was unable to positively identify them as a particular source type, usually comprised of a mix of things like Amazon product reviews, Yelp, Trip Advisor, and smaller up-and-coming social media sites.

We didn't used to include these in the Share of Voice report (similar to neutrals not being shown in the Brand References report), but by popular demand, found it more efficient to visually quantify these "others" into the chart. You can drill down into these results to get an idea of what's there.

If you find results that you'd like assigned to another media type, you can do this:

1. Select Edit next to the result
 2. Under SM2 Categories, uncheck the box for Media Types – Other
 3. Uncheck the box for Show only checked
 4. Check the box next to your desired media type (blog, forum, etc)
- 



SM2 won't let me set up category rules. As I follow the prompts and click next after adding the keywords, it shows an in progress "please wait" and it doesn't change.

We are aware of a bug creating category rules in using Safari and Chrome browsers, and are working to address it as quickly as possible. Try using Firefox or IE to do this instead. Sorry for the inconvenience!

Popularity

How do you determine popularity?

SM2 assigns all search results a Popularity Rank depending on the site type. We use the term Popularity in SM2 because we use our own formula to calculate 'influence'. For blogs and websites, we take into account the amount of traffic, the number of links from other sites to that site, and also page views per user. For video sites, we look at the number of times the clip has been viewed; for Twitter, we look at how many people the user is following, as well as how many people are following the user.

You can also find a breakdown of the information that we are using under View Results | Full Details | Stats tab.

Sentiment

What are the differences between the three sentiment reports?

SM2 uses natural language processing to evaluate sentiment on each result in your profile. You can view the dictionary we use to do this under Setup | Dictionary. We offer the ability to view and edit four different languages, though we track many more.

All three reports are fully drillable, giving you the ability to adjust sentiment on a result-by-result basis in each report.

Brand Reference reports show you how people are talking about your brand or search terms. We evaluate the surrounding syntax of each mention of your brand in an article or post. Content Tone analyzes the overall sentiment of a result, independent of your brand. It is entirely possible to have a Positive Brand Reference in a Tone: Negative result. The Content Emotions report breaks down the type of words people are using in proximity to your brand or search terms.

My sentiment analysis is skewed! What can I do?

We do offer you the ability to edit our natural language processing dictionaries in a few common languages. You can view and edit these under Setup | Dictionary by loading the desired language and word category. To alter sentiment, you'll need to edit both the Posemo (Positive Emotion) and Negemo (Negative Emotion) categories. For clarity's sake, we'll use the example of something fairly neutral being classified as a negative indicator- a hospital whose results frequently contain the word "illness." Under Negemo, delete all entries surrounding the topic (ill, illness) and save your changes.





If you choose to edit the dictionary, these are the specific steps:

1. Either clear all results in your current profile or create a new copy profile without any results in it. Reason: you'll need to re-run your searches to send results through your updated dictionary.
2. Under Setup | Dictionary in the cleared profile, make your changes.
3. Re-run your searches.

Alternatively, if you'd like to augment your Posemo or Negemo lists, you can do this very quickly using a category rule.

1. Under Setup | Category Rules, create a new rule with words you'd like to be considered negative or positive. (You'll need a separate rule for each emotion.)
2. On the last step asking you to select a category, select Positive Opinion or Negative Opinion from the list of existing categories.
3. Once your rule has been saved, go to Setup | Category Rules, and select Run Now.

Reports

I tried downloading an Overview Report and got an error message saying it has moved HERE (with HERE being a broken link).

This generally means that a piece of your data is causing a hiccup. It is difficult to isolate which result is causing the issue, but there are steps you can take to narrow it down and work around the incompatible result. Try creating your report using different date ranges and different search terms. After a little trial and error, you can then create your Overview Report, avoiding the date or search term combo you isolated.

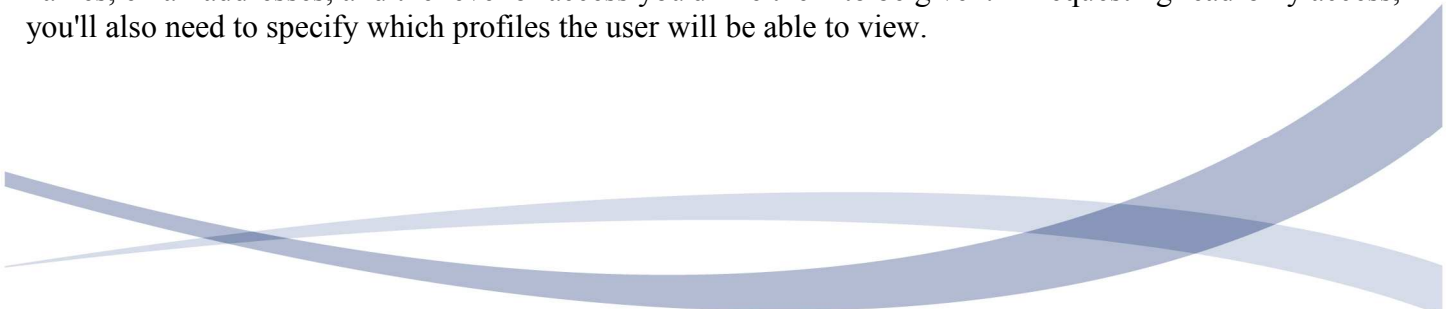
Read Only Access

Can I create a user that will only be able to see one profile?

Yes. We offer two levels of user access: full access and read-only access. Full access allows a user to view and create new profiles and searches, and to edit custom sources, filtered sources, and more. Requested new users are automatically given full access unless you specify otherwise.

We also offer read-only access. Read-only users will only be able to see the profiles you request. They offer a level of privacy if you have multiple customers or independent teams all logging into SM2. With a read-only login, users will not be able to view or access the Setup menus and Search Setup options, delete or spam results, build custom theme graphs, or use SM2's Workflow function. They will, however, be able to view all results in the profile and to build reports using that data.

To add any new users to your account, please send an email to support@techrigy.com with the users' names, email addresses, and the level of access you'd like them to be given. If requesting read-only access, you'll also need to specify which profiles the user will be able to view.





Real Time Alerts

I received an email alert saying my search had a new result, but when I logged into my account, nothing was there. What happened?

When a result appears in your alerts email, it doesn't mean it is in your SM2 account yet; it just means we've picked up a new article containing your search term and have it stored in the Social Media Warehouse. Your profile's searches need to run before SM2 knows to go grab that result for you. In other words, the Alerts feature is meant to be a tool for engagement, not analysis - it tells you about a result before you get it.

Because Alerts are based purely upon the Social Media Warehouse collecting a new article with your search term, you may also notice alerts with characteristics that don't line up with your search's date, location, or language filters. If this is the case, you'll see the result appear in your Filters list after your next search runs.

Special Characters

SM2 regards hyphens differently depending on where you are and what you're doing with them.

1. Search setup - hyphens are the same as spaces
2. View Results, search bar - hyphens and spaces are different
3. Filters, search bar - hyphens and spaces are different
4. Exclusions - hyphens and spaces are different

For further assistance contact us at support@techrigy.com

