Social Media Check Portal User Guide

Version 2.0.2

socialmediacheck-business.com

What is the Social Media Check Portal?

The Social Media Check Portal is a service that allows you to manage all aspects of Social Media Checks that you or your candidates complete against your account. It allows you to view and manage report output, manage candidate registrations, transfer tokens between accounts, create audits and manage user access.

This user guide will walk you through the portal and provide you with all you need to know to manage your Social Media Check reports.

Contents

Sign Up

Once you have received your onboarding information, via an Invitation email, to use the service, your Social Media Check account will have been set up and you will be able to access this via the Social Media Check portal.

To activate your user account, you will need to follow the link from the '**Accept Invite**' button on the invitation email. This will take you to the Social Media Check portal to register your user account. **[Image 1]**

For your first sign in, you will need to set your account password. To do this, you will need to enter your email address (this will be included in your onboarding email) in the Email field. You will then be able to enter your password in the Password field (this has to be a minimum 8 characters in length). Click the '**Register**' button and you will be redirected to the email verification page. **[Image 2]**

Note: Please ensure you have access to the mailbox of the email you are using to set up a user account.

You will receive a 6-digit code to your account email address which you will need to enter on this verification page in order to verify your email address and verify your account. Once you enter the 6-digit code, click '**verify**'. Your account will be created and you will be taken to your new Social Media Check Portal. **[Image 3 & 4]**

Access the Social Media Check portal at:
https://portal.socialmediacheck.com/

Note: You can check the '**Remember Me**' box to save filling in your username on the device you are using every time you need to sign in.

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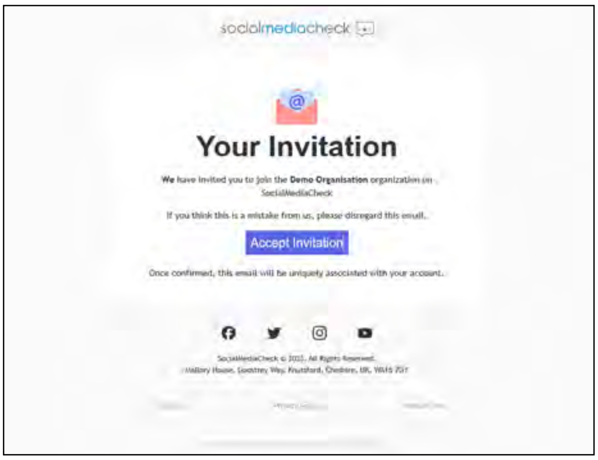

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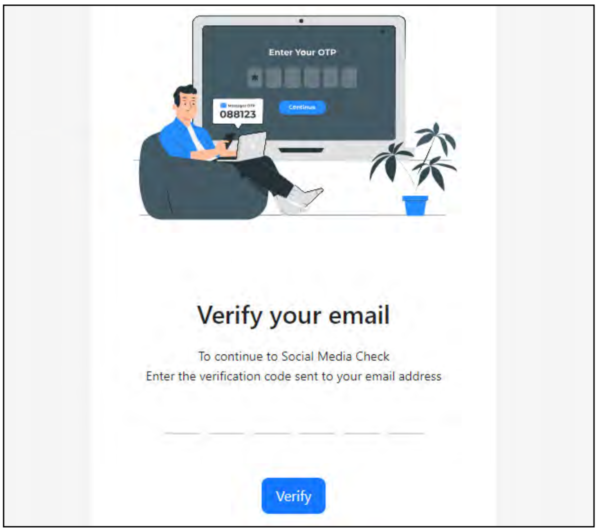

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Your verification code is 157572

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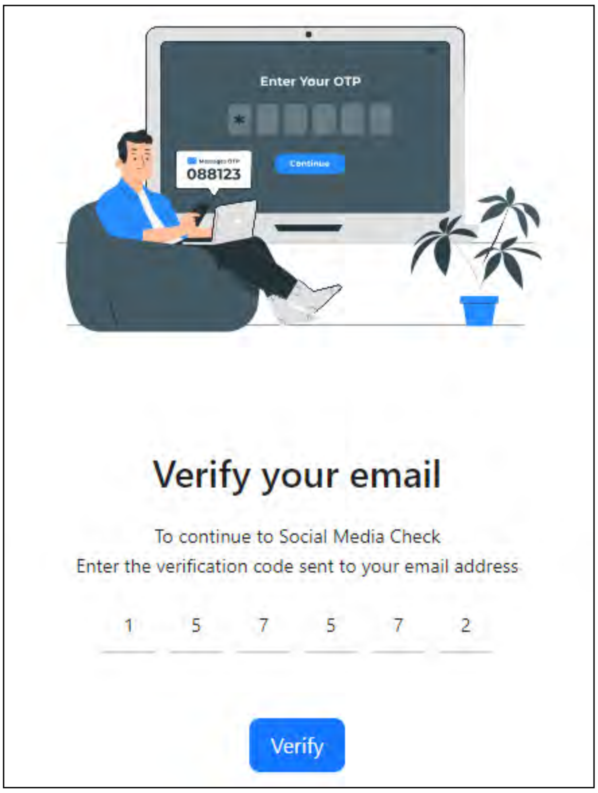
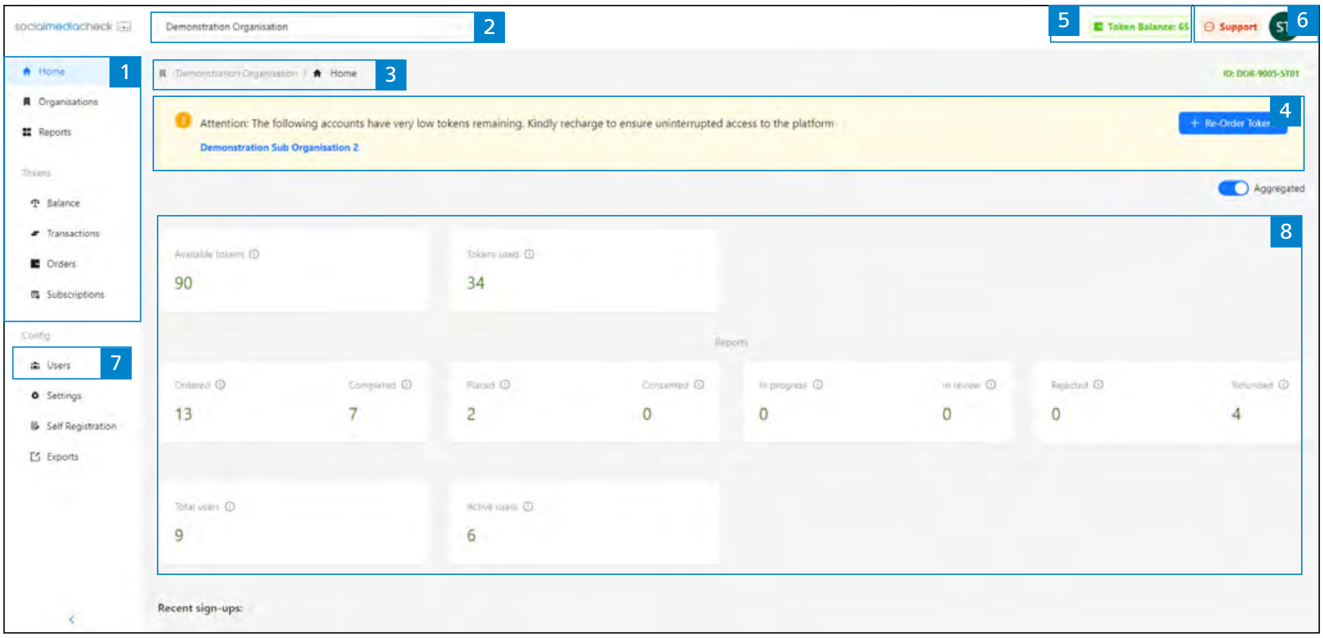


Home Page

Once signed in to the Social Media Check Portal you will be directed to your account Home Page. Here you will be able to see core information on Token use, Report Progress and User Activity. You will also be able to see if your account or any sub accounts you have are low or have no tokens available. You can use the pane on the left-hand side to navigate between different sections of the Social Media Check portal. **[Image 5]**



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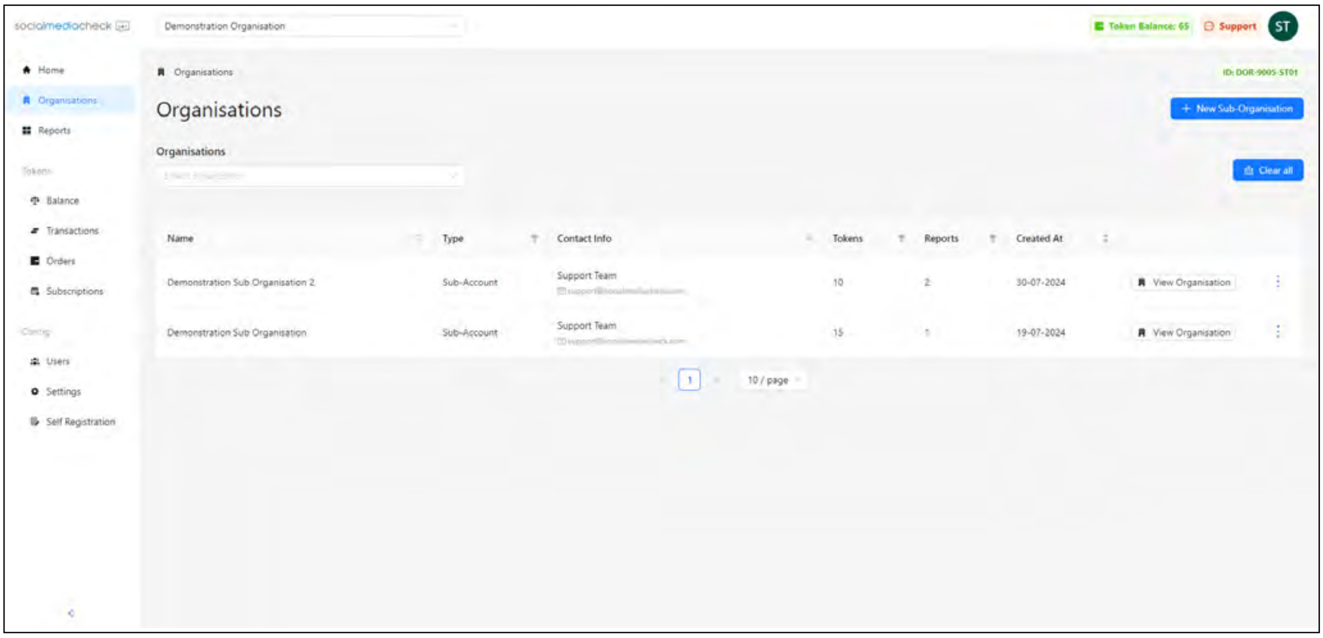
1. **Menu Bar** - used for navigating to and from sections of the Social Media Check Portal
2. **Account Display** – Shows what level of the account you are accessing / viewing.
3. **Organisation Hierarchy** – This shows the hierarchical relationship between your organisation and its sub organisations.
4. **Token Notification** – This view will be present if one or more of your organisations have low or no tokens available.
5. **Token Balance** – This shows how many tokens are available for the account you are accessing; this is also the account displayed in 2.
6. **Support Button** – Here you will find all the support resources you need for the portal including How To Videos, FAQ's and support contact information.
7. **User Account options** – Clicking on this avatar allows you to quickly manage organisations, manage your account and Sign Out of your account.
8. Here is where you can find Token, Report and User information.

Organisations

The organisations page allows you to view and manage the organisations or sub organisations you have within your Social Media Check Portal. In the table presented, you will find any organisations which sit below your access level in the hierarchy of your account. It displays the key contact information, token & report orders. **[Image 6]**

Note: If you have no organisations listed in this table it means they haven't yet been added or your account has no sub accounts below your access level.



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Adding New Sub-Organisations

You can add Sub-Organisations to your account, these are organisations which sit under the organisation you are accessing in the account hierarchy. You will be able to see the reports, users and account information for sub organisations as well as your organisation. However users in sub organisations will only be able to see the reports and data relating to their sub organisation and nothing else. **[Image 7]**

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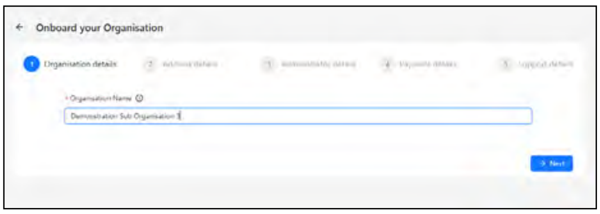
To add a sub-organisation to your account, click the '**New Sub-Organisation**' button. This will take you to a new screen where you can populate the organisation details for the organisation including; Name, Address and Payment details. Once you have provided all this information click 'save' and you will be able to see the new sub-organisation has been created and displayed in the organisations table. **[Image 8, 9 & 10]**



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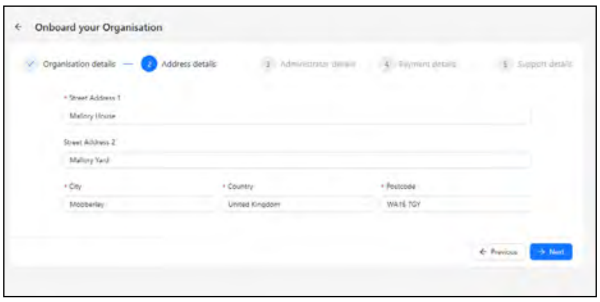

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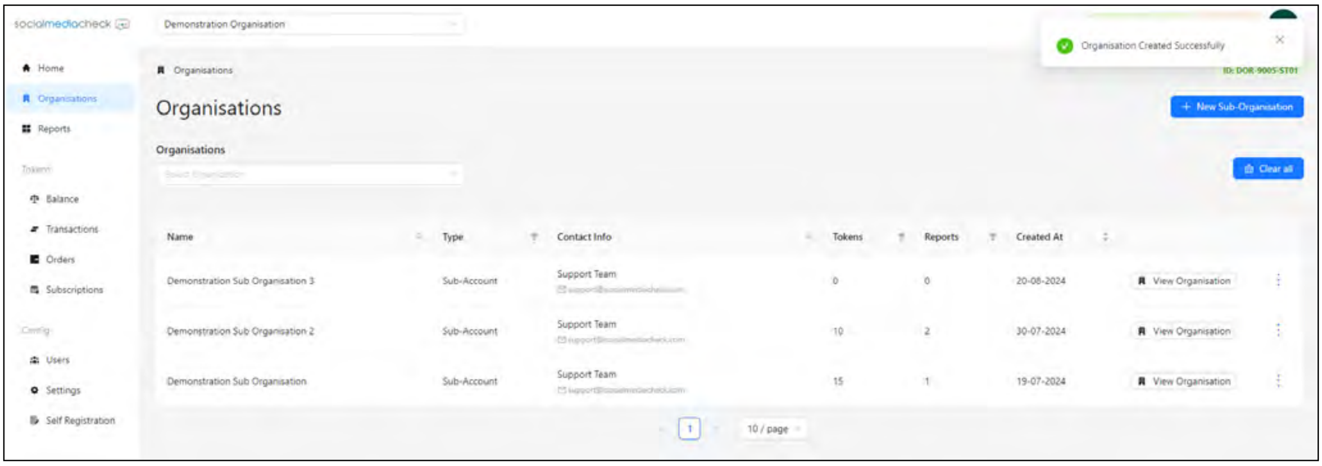
Adding New Sub-Organisations *continued*

Note: The '**Support Details**' will outline an email address and contact number which will be displayed in the support section should anyone with access to the Sub-Organisation need help using the portal.



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Managing Organisations

You can view the details of an organisation by clicking on the row of the table where the organisation is listed. If you wish to amend the organisation's details you can click the three dots on the right-hand side of the table then '**Edit Organisation**'. This will bring up a pane with the organisations information, click on any field(s) you want to change, edit the data then scroll down and click 'save' to save the changes. Once saved, you can click anywhere off the pane to close it. **[Image 11 & 12]**

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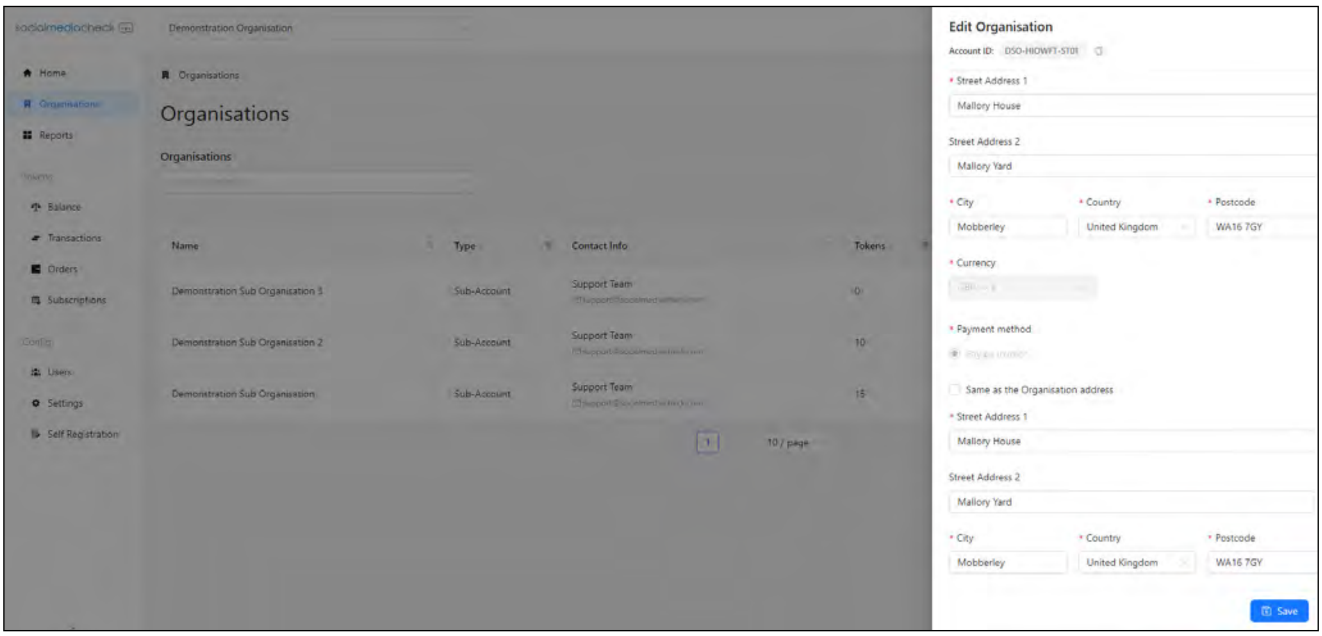

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Viewing Sub-Organisations

To view a sub-organisation, you can click '**View Organisation**' from the table or from the three dots menu. This will take you to the view of a user who has access to that sub account. The organisation name will have changed in the organisation bar at the top of the page to the sub-organisation you are viewing. **[Image 13 & 14]**

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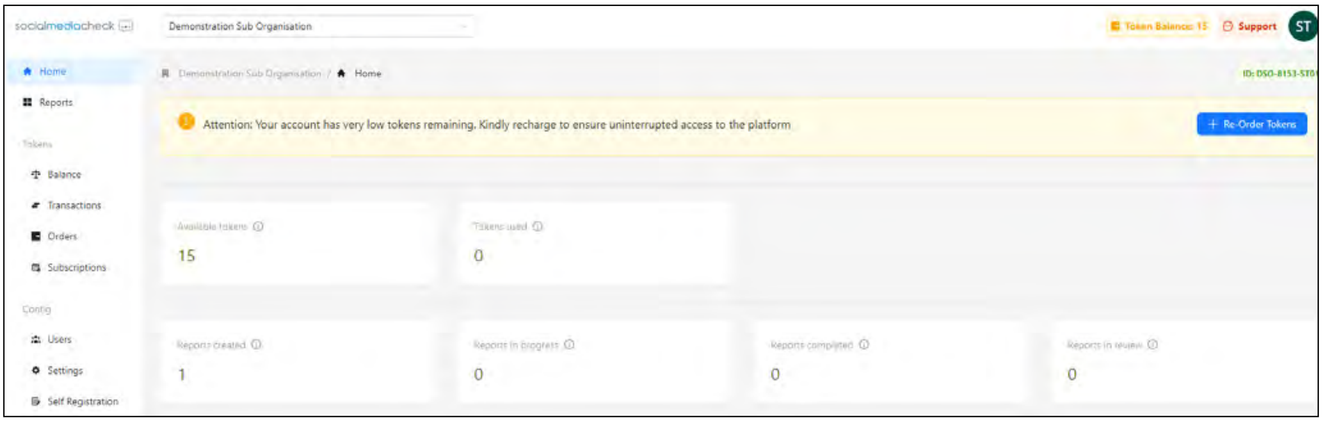
Note: You can select the master organisation from the account display to go back to that account view.



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Deleting Organisations

If you wish to delete a sub organisation, you can open the menu from the three dots, click '**Delete Organisation**' and then click '**Delete**' on the confirmation pop up that appears. **[Image 15 & 16]**

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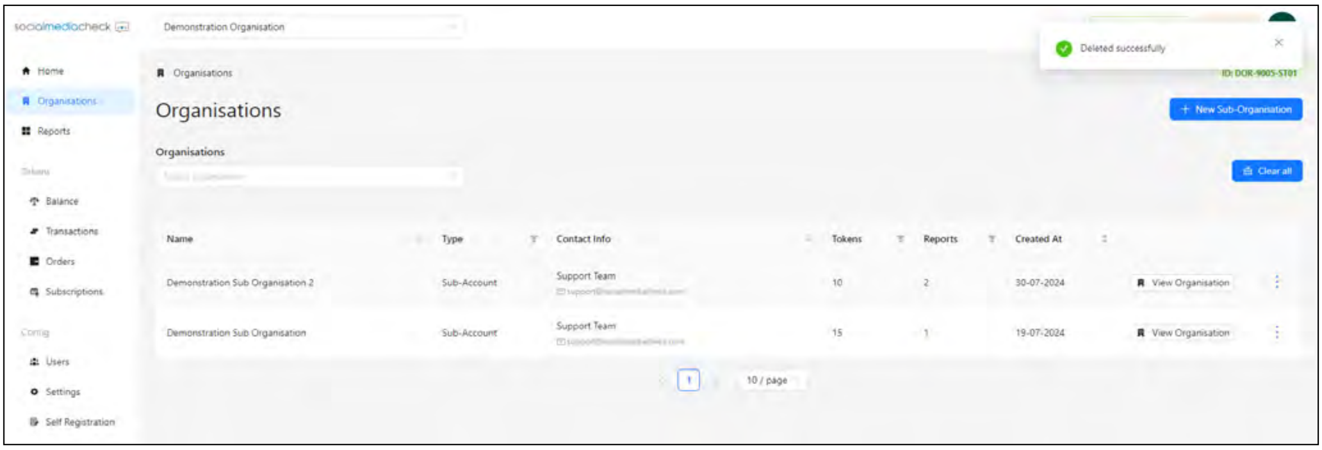

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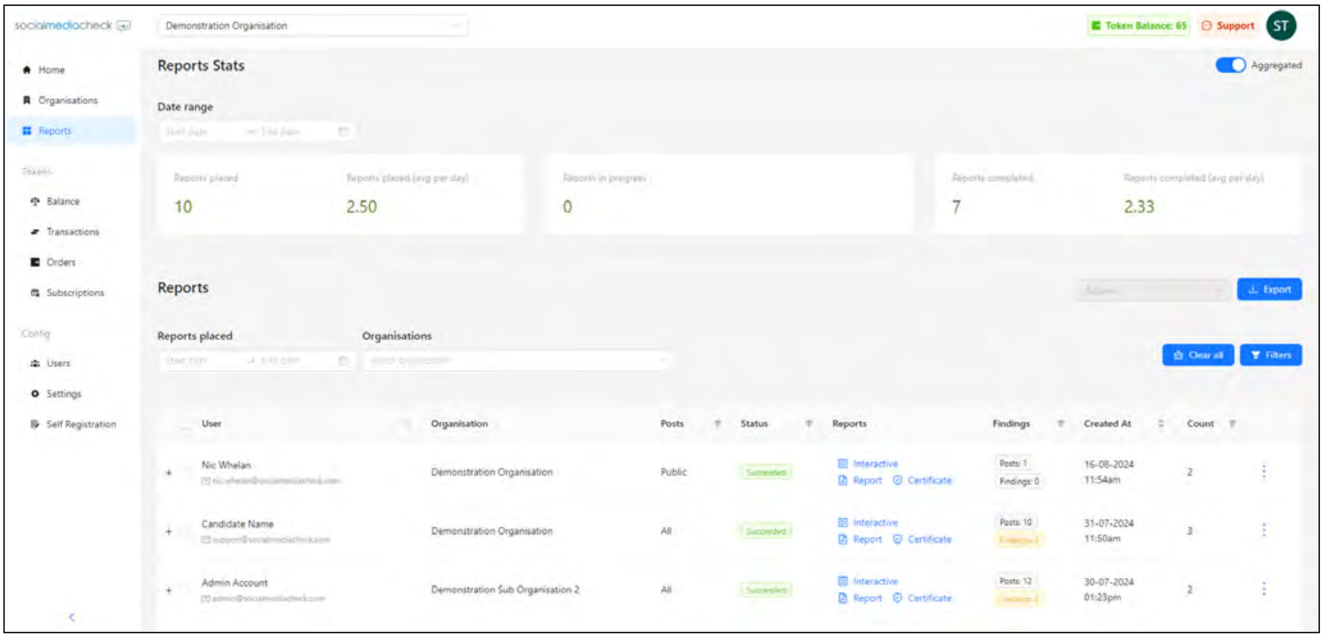
Note: If you delete an organisation this will remove all active user accounts for that organisation. Any reports that have been completed against the deleted sub organisation will only be accessible from the parent or master organisations reports table.

If you wanted to add the sub organisation again, you can do this by using the 'new sub organisation' button. However, this will be created as a new sub organisation and there will be no history remembered for the account even if it is named the same.

Reports

A Social Media Check report is generated when a candidate has completed the consent request and their social media accounts are run through the social media check system. A report is generated to show any findings against our classifiers. You can view and mange reports from the Reports page in the portal. **[Image 17]**

Note: If you have no organisations listed in this table, it means they haven't yet been added or your account has no sub accounts below your access level.



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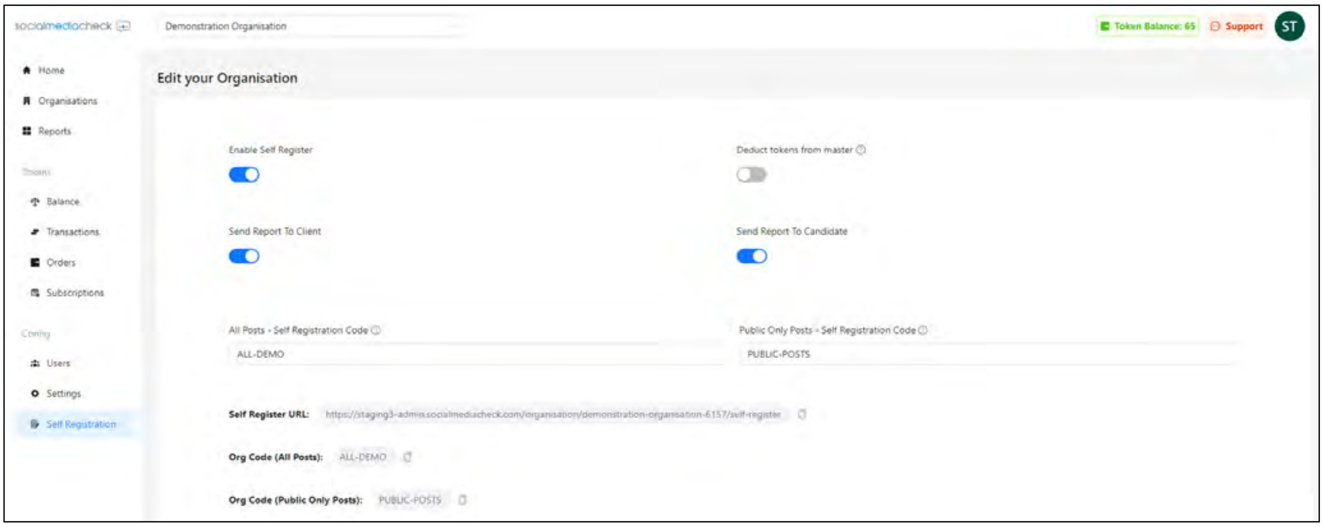
Generating a Report

To generate a new report for a Social Media Check candidate, you will need to use the Self-Registration link and code. To find these navigate to the self-registration page which you can find in the menu bar. You can use this registration link in 2 ways to get a candidate to complete a Social Media Check. **[Image 18 & 19]**



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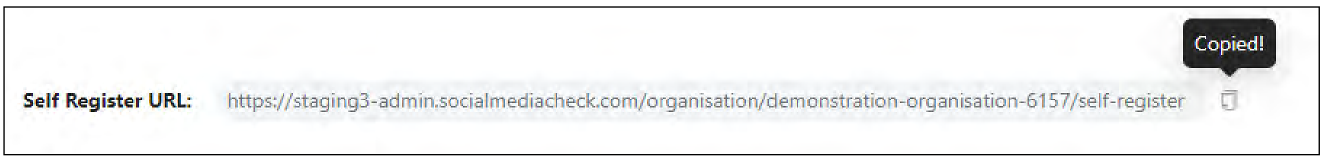

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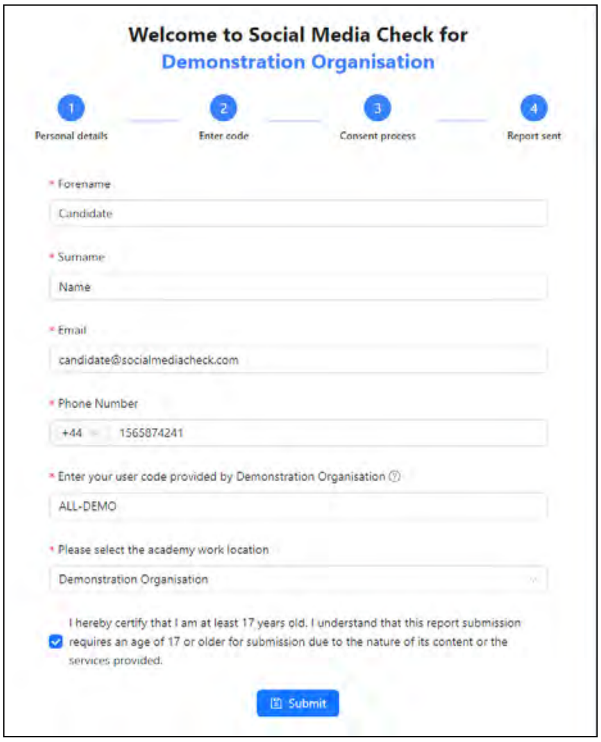
Generating a Report *continued*

1. If you have all the candidate's information (Name, Email Address and Contact Number), you can copy the registration URL and paste this into a browser. You can then fill out the form on behalf of the candidate and enter the self-registration code and work location before submitting the registration. **[Image 20 & 21]**

   Once submitted, this will automatically email the candidate a Social Media Check consent request to the email address entered on the registration form. This will allow the candidate to fill out and submit the check for processing. It's at this stage the candidate will appear as a row in the Reports table of your Social Media Check portal. **[Image 22]**

2. If you don't have the candidate's information or want them to register themselves to complete a Social Media Check then you can provide them with the Self-Registration URL and Org Code and they will be able to populate and submit this registration form themselves. **[Image 19 & 23]**

   Once the candidate has submitted this registration form, the process will work the same as if you have submitted the registration. The candidate will automatically be emailed the consent request to complete. You will get an email notification that the registration has been filled out and the candidate will appear as a row in the Reports table of your Social Media Check portal. **[Image 24]**



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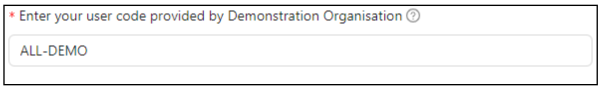

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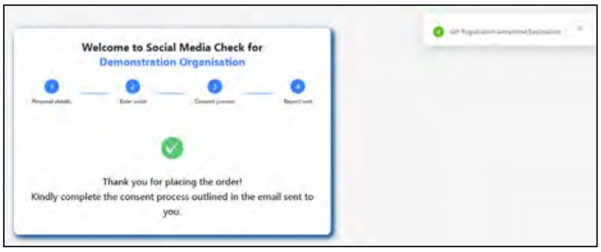

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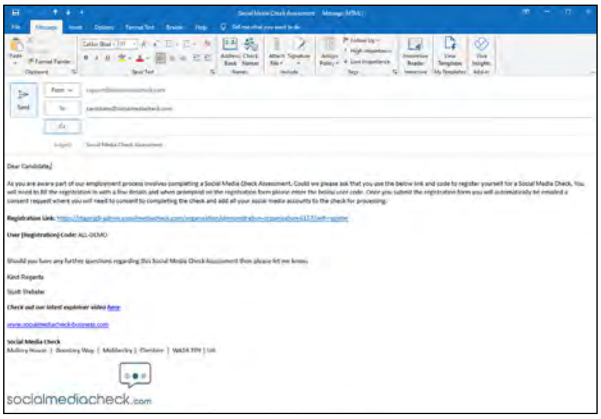

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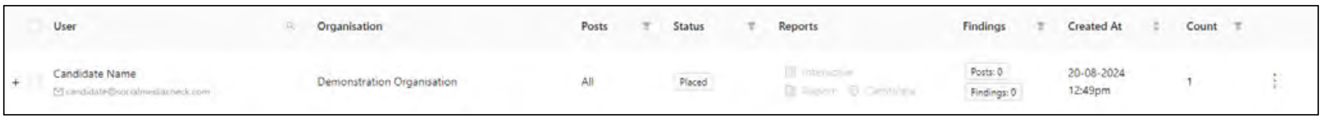

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Note: the 'user code' on the registration form is the self-registration code that you have defined in your portal and allows you to restrict who is able to complete a check for your account, as well as defining the scope of the check being completed (all posts or only public facing content). You can see more information about registration configuration in the 'Self-Registration' section of this user guide.

Report Status

Once a candidate has been registered to complete a Social Media Check report for your organisation, they will appear as a row in the Reports table. You can access the Reports table from the Reports page listed in the left hand menu bar. The Report Status column will give you valuable insight as to what stage of the report the candidate is up to. The different Report status options are outlined as below:

Registered

This indicates that a candidate has been registered to complete a Social Media Check report, have been automatically emailed the report but is yet to complete the report.

Consent Started

This indicates the candidate has clicked consent on the consent email that's automatically sent once they've been registered, but they haven't yet added their social media accounts to the check or have added their accounts to the check but have not clicked the 'submit' button at the end of the check.

In Progress

This means the candidate has submitted their social media check for processing and their content is currently being checked against the classifiers.

Succeeded

This means the social media check has been processed successfully and the report output will be available in the portal to review.

Rejected

This indicates that a candidate has been registered to complete a Social Media Check report, has been automatically emailed the report but has DECLINED to complete the report.

Reviewing

This status indicates that processing has been paused or errored.

Once a candidate has completed a Social Media Check and their report has been generated then their Report status will show as "Succeeded" and the Report output links (Interactive, Report & Certificate) will then be active.

Refunded

This status indicates that a token has been refunded back to your account following the 'Refund & Revoke Consent' action for an incomplete report. **[Image 25]**

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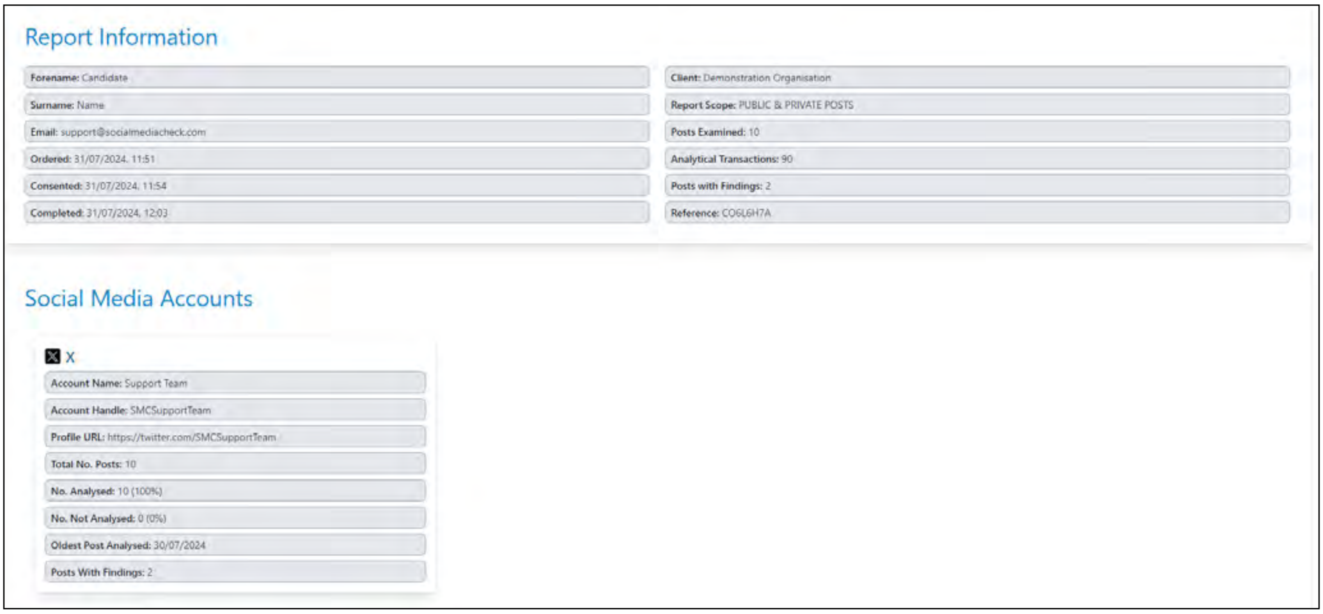
User	Organisation	Posts	Status	Reports	Findings	Created At	Count
Candidate Name candidate@socialmediacheck.com	Demonstration Organisation	All	Placed	Interactive Report Certificate	Posts: 0 Findings: 0	20-08-2024 12:49pm	1
Nic Whelan nic.whelan@socialmediacheck.com	Demonstration Organisation	Public	Succeeded	Interactive Report Certificate	Posts: 1 Findings: 0	16-08-2024 11:54am	2
Candidate Name support@socialmediacheck.com	Demonstration Organisation	All	Succeeded	Interactive Report Certificate	Posts: 10 Findings: 2	31-07-2024 11:50am	3
Admin Account admin@socialmediacheck.com	Demonstration Sub Organisation 2	All	Succeeded	Interactive Report Certificate	Posts: 12 Findings: 7	30-07-2024 01:23pm	2
Info Account info@socialmediacheck.com	Demonstration Organisation	All	Placed	Interactive Report Certificate	Posts: 0 Findings: 0	30-07-2024 12:47pm	1
Sales Account sales@socialmediacheck.com	Demonstration Sub Organisation	All	Declined	Interactive Report Certificate	Posts: 0 Findings: 0	30-07-2024 12:47pm	1
John Sant john.sant@socialmediacheck.com	Demonstration Organisation	All	Succeeded	Interactive Report Certificate	Posts: 549 Findings: 12	30-07-2024 12:26pm	1

Viewing Reports

To view the report output, you can click the corresponding button on the row of the candidate whose report you wish to view. The three report outputs provide the following:

Interactive

This is the easiest output to review the findings. The interactive report outlines some basic candidate information, the social media accounts which have been included in the check, the number of posts analysed as well as number of findings per account. This also includes a report summary which displays each of the report findings and any images associated with the post that has been identified under one or more of the classifiers. **[Image 26 & 27]**



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Report

This is a PDF document of the report findings. This outlines the social platforms checked, which classifier groups the report has findings for and a link to the original content. This can be sent to the candidate who has completed the check as a means for them to review, update or delete any posts which have been flagged. **[Image 28]**

Certificate

This is a PDF certificate which outlines the number of findings against each classifier. This is best used for storing on an individual's HR record as an audit trail. This certificate doesn't display any findings. **[Image 29]**

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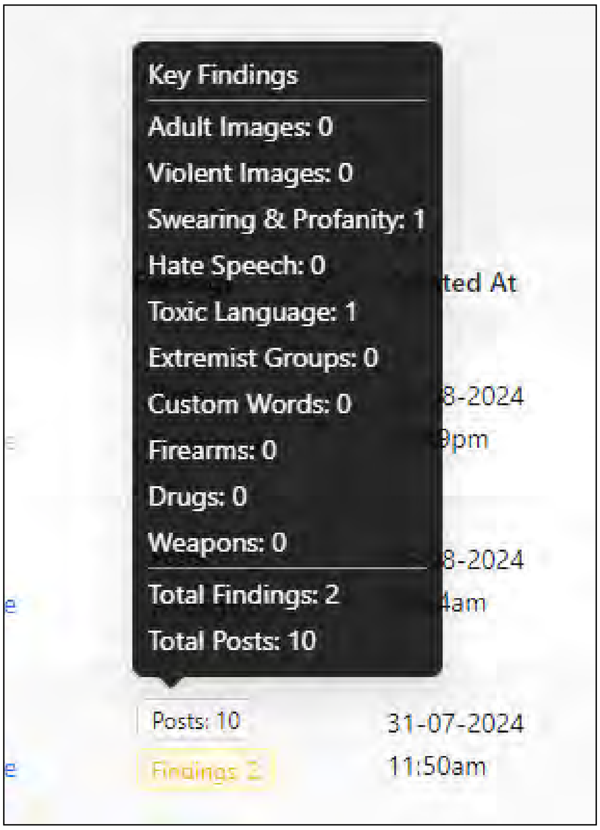
Report Details

The Reports table also displays the number of reports which have been completed under the '**Report Count**' header. If there has been more than 1 report completed you can use the '+' icon to the left side of the table to expand the view to show previously submitted report findings. You can close this view by clicking the '-' icon.

The number of posts analysed and number of findings for a candidate's report can be found under the '**Findings**' header. If you hover your cursor over the findings for a candidate, you can quickly see how many findings there are for each one of the classifiers. **[Image 30]**



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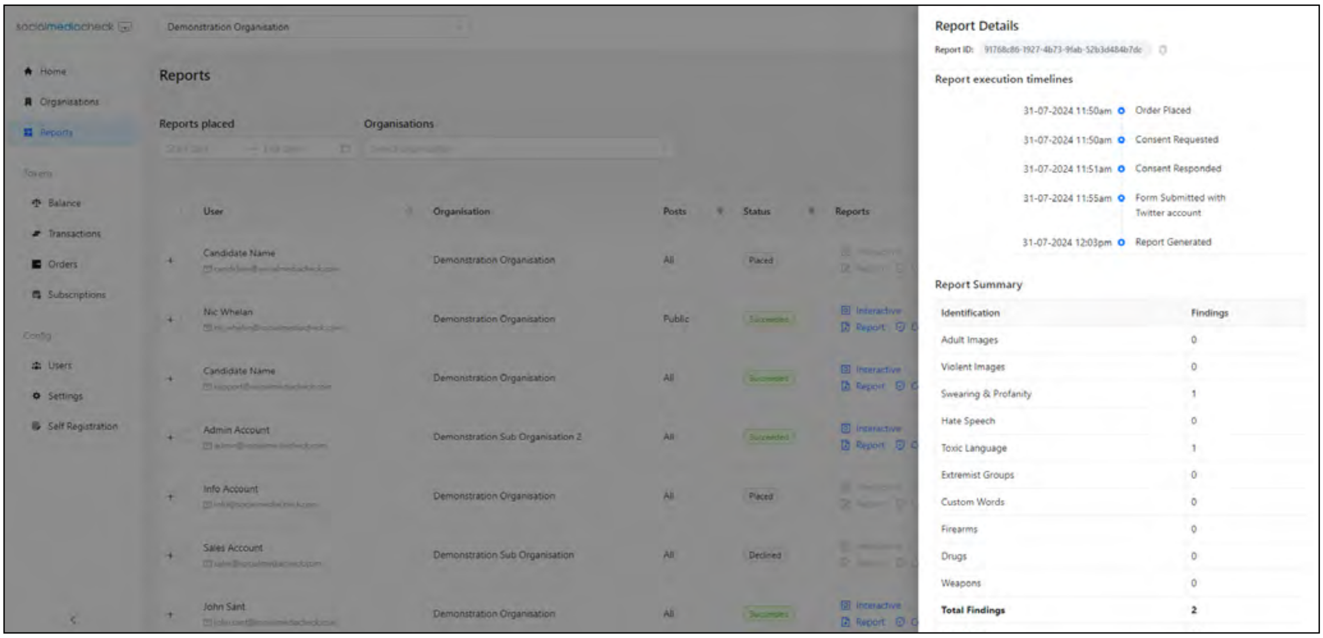
To view the Report Details panel, you can click on the row of the candidate's details you want to see and the panel will pop up. Alternatively, you can click the 3 dots menu to the right of the table and click '**View Order Details**'. This panel will display the Report execution timeline where you can find a timeline of where a report is up to, along with the number of findings in each classifier category if the report has been generated. **[Image 31]**



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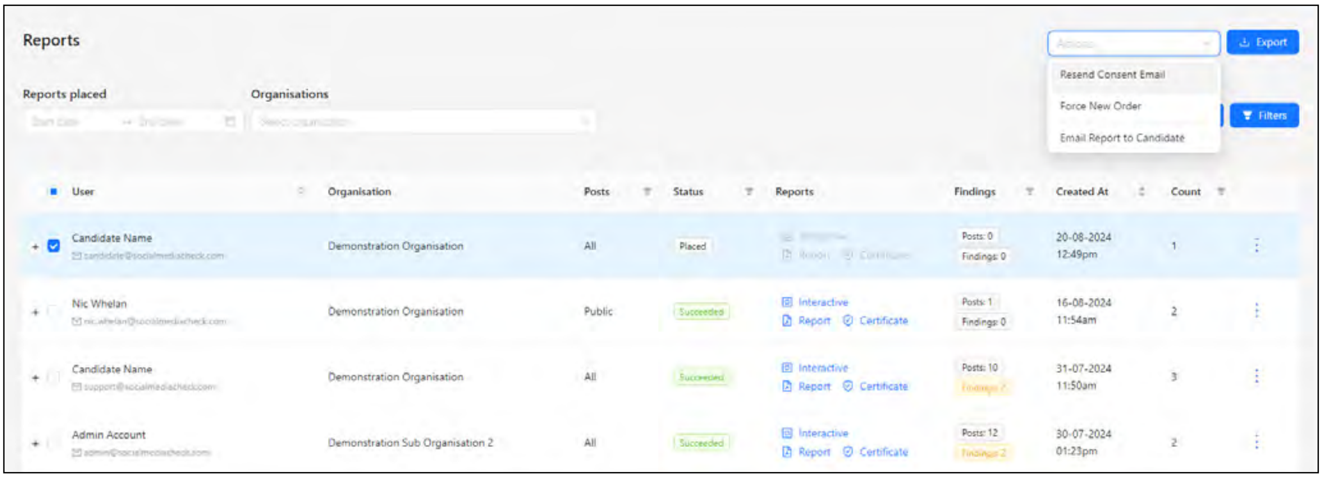
Report Actions

On the right side above the reports table, you will see an '**Actions**' dropdown. This will allow you to perform some actions against candidates who have registered to complete a check. These actions can be completed against a single candidate or multiple candidates by selecting the tick box on the left side of the reports table for each candidate you wish to perform an action against. The candidates that the action will be performed against are those highlighted with a blue tick next to them. **[Image 32]**



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The actions you can perform are the following:

Resend Consent Email

This action is applicable to candidates who have registered to complete a check but have not yet completed a report. This allows you to send the candidate another consent email to the email address they registered to complete a check. This is useful when a candidate has lost the consent email.

Force New Order

This action allows you to create a new order against a previously checked candidate. This will deduct a token from your account balance and create a new consent cycle for the candidate as though they have registered to complete a check another time. This is useful for when you have already captured the candidate's information and they have submitted a Social Media Check, but you need them to complete another report.

Email Report to Candidate

This action is applicable to candidates who have completed a Social Media Check. This will send the candidate their report output to the email address they registered to complete a check. This is applicable for accounts that do not automatically email the candidate their output or when a candidate cannot find their report output email.

Refund & Revoke

This action allows you to refund the token used by a candidate who has registered to completed a Social Media Check but has not completed the check. You can refund a token in one of the following report states: **Placed, Consented, Rejected.** Upon refund, the report status will update to '**Refunded**' as well as automatically adding a token back to the account balance. The candidate will no longer be able to complete the report and the ability to consent will be revoked.

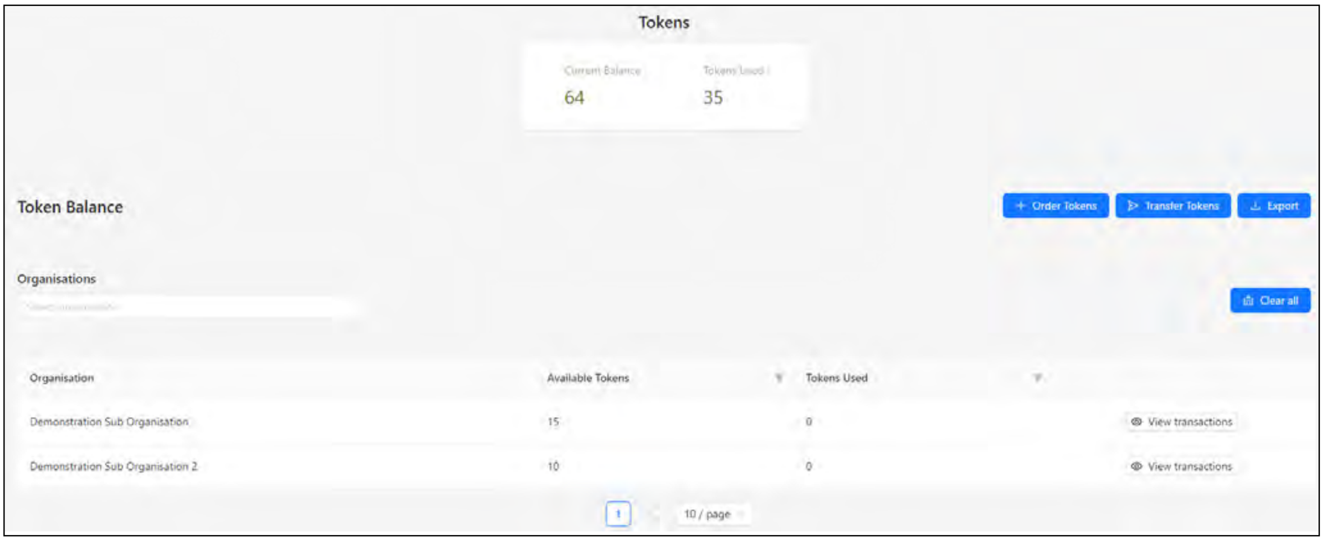
Note: You can only use the 'Refund & Revoke' action on a single report so this cannot be accessed via the bulk Actions dropdown. Instead, you can action this on the individual report row by clicking the three lines menu on the right side.

Tokens

The tokens pages of the Social Media Check portal allow you to manage your Social Media Check report tokens including managing token numbers, token movement between sub organisations within your account and token orders and subscriptions.

Balance

The Balance page allows you to view the current token balance for your organisation in the Social Media Check portal as well as any Sub Organisations that you have access to within your account. You can see your current token balance and usage at the top of the page. **[Image 33]**



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Current Balance

Is the number of tokens you have available in your account which you are yet to use.

Tokens Used

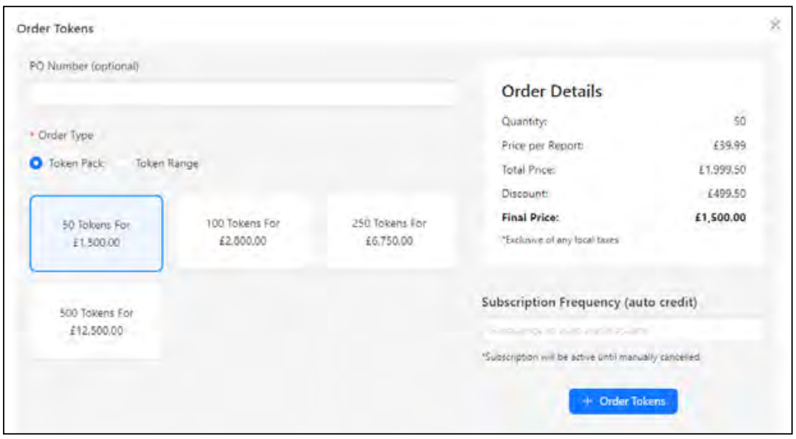
Is the number of tokens which have been deducted from your account either by generating a Social Media Check report or by transferring to a sub organisation within your account.

Order Tokens

You can order more tokens for your account by clicking the '**Order Tokens**' button, this will bring up the token order window. To make a new order you will need to select an Order Type for one of the following:

Token Pack

This is a set number of tokens to be ordered i.e. 100 pack. There may be some discount applied to a token pack depending on the volume of tokens. **[Image 34]**



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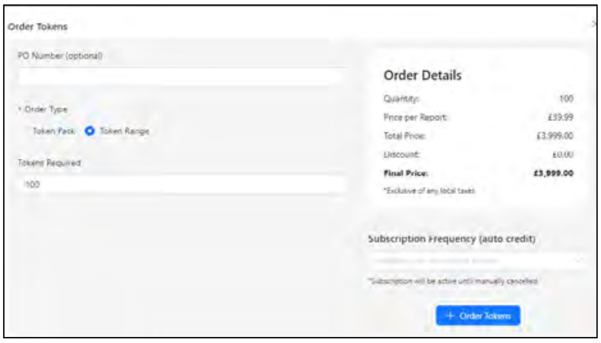
Order Tokens *continued*

Token Range

This is where you can select a specific number of tokens to order. Depending on the volume of the order this will automatically apply any discount available if the number of tokens inputted falls within a discount range. **[Image 35]**

The details of the order are displayed on the right-hand side of the window, this will outline the quantity of reports being ordered, the costs and any discounts applied. If you wish to make the order a recurring subscription for the number of tokens ordered, you can select the order frequency from the dropdown provided. If you don't require a subscription, then leave this field blank. Once you're happy with the order click the '**Order Tokens**' button and your order will be processed.



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Note: Once an order has been placed it will first be verified before being fulfilled and the tokens added to your account. To check the status of your order you can navigate to the '**Orders**' page and here you will see whether an order is pending or whether it has been fulfilled. Once fulfilled the tokens will be added to your account and the token balance will automatically update.

Transfer Tokens

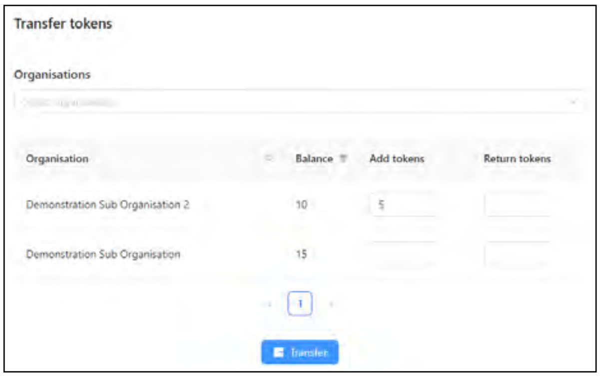
To transfer tokens between master and sub accounts, you can click the '**Transfer Tokens**' button. This will open a side pane which will list the sub organisations in your account (if any), the number of available tokens for each sub organisation and the options to '**Add tokens**' or '**Return Tokens**'. **[Image 36]**

Add Tokens

This will allow you to input any number up to the maximum number of tokens available on your master account. The number entered here will transfer the specified number of tokens from the parent or master account and allocate these directly to the corresponding sub account for use.

Remove Tokens

This will allow you to enter a value up to the maximum number of available tokens in that sub account. This will remove the tokens from the sub account and reallocate the tokens back to the master account. **[Image 37]**



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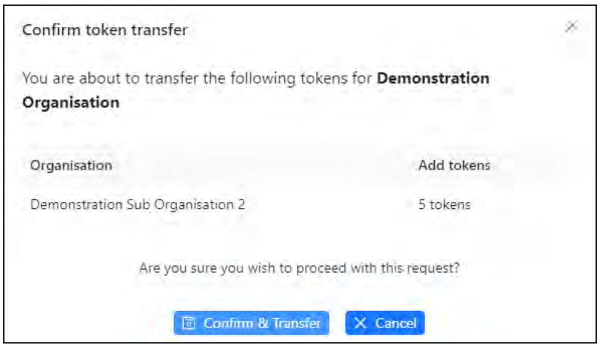

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Once you have entered the number of tokens you want to transfer to or from a sub organisation, you can click the '**Transfer**' button. This will bring up a confirmation of the token transfers you are about to complete and from here you can confirm these transfers by clicking '**Confirm & Transfer**'. You will get a notification to say the tokens have been transferred and the balance for the master account and sub organisation will be adjusted.

Note: The '**Export**' button will export the contents of the table as a .csv file.

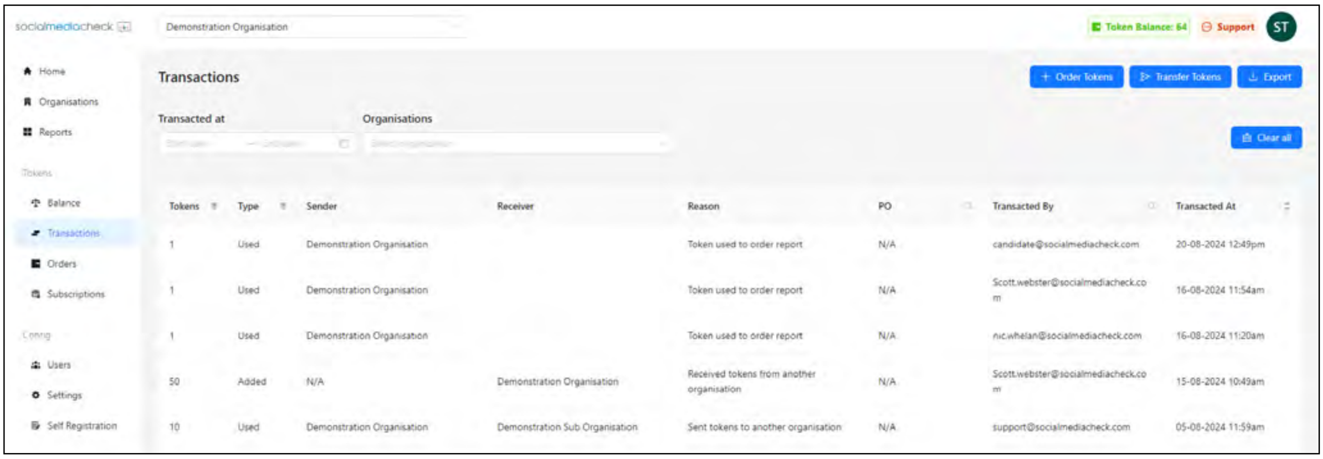
You can see the breakdown of available and used tokens for any sub organisations in the table at the bottom of the page. This also gives you the option to view transactions made by each sub organisation which will take you to a refined view of their transactions page (this is outlined in the next section). You can filter the view of this table to a sub organisation or multiple organisations by selecting these from the Organisations list.

Transactions

The Transactions page allows you to view the transactional history of tokens within your account. It displays information on the number of tokens, whether they have been used by the account or added to it and who made the transaction. **[Image 38]**

Note: You can filter the content of the orders table using the Date Range and Organisations filters as outlined in the Filters section.

You can **Order Tokens** and **Transfer Tokens** from the transactions page as with the balance page.
The '**Export**' button will export the contents of the table as a .csv file.



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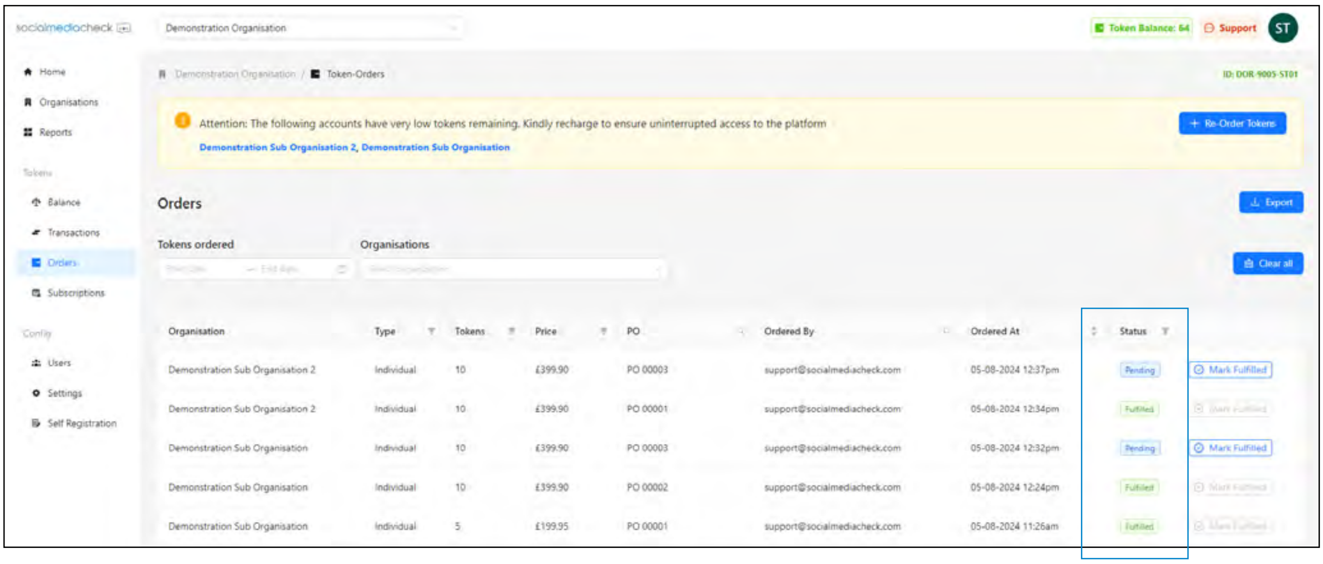
Orders

The Orders page allows you to view the order history of tokens for the account. This allows you to see what orders have been processed on what day, the number of tokens ordered and the cost of each order. This can be useful with forecasting when you need to purchase more tokens and the amount, as well as keeping an audit of all token orders within your account. **[Image 39]**



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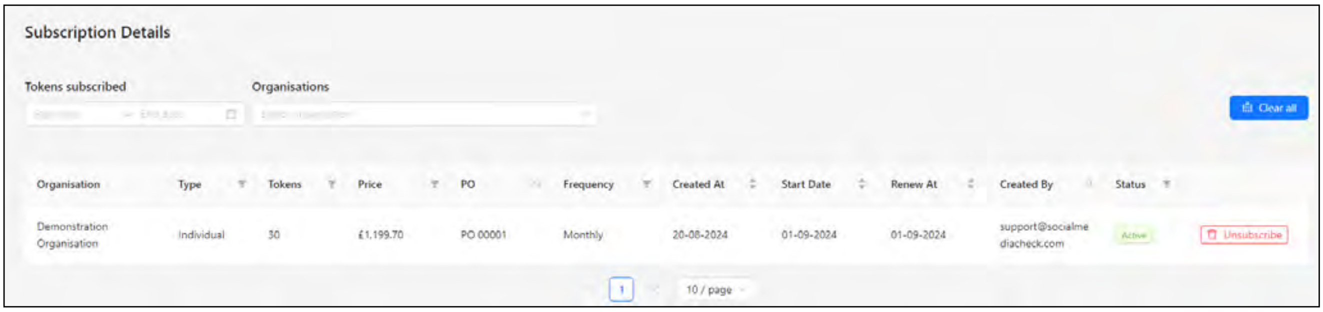
You can see if a token order has been fulfilled by checking the status column this outlines whether an order is 'pending', where the tokens have not yet been allocated to your account, or 'fulfilled' and the order has been completed and tokens allocated.

Note: You can filter the content of the orders table using the Date Range and Organisations filters as outlined in the Filters section.

Subscriptions

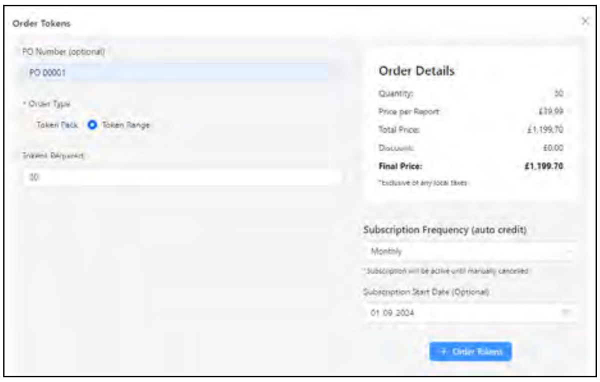
The Subscriptions page allows you to view and manage any subscriptions for your account. Here you can view both active and inactive subscriptions, the frequency and date the subscriptions renew. **[Image 40]**



40

Add a Subscription

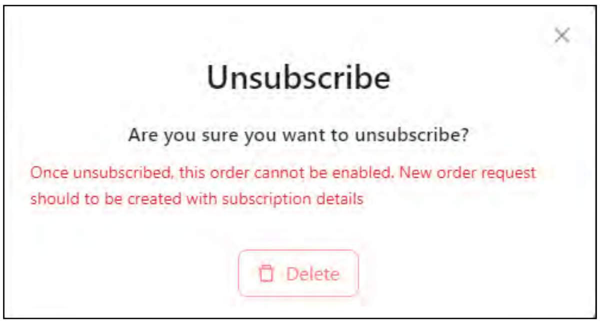
To start a subscription, you can go to the **Balance** or **Transactions** page and click the '**Order Tokens**' button. From this screen you can enter the number of tokens required or select a pack. To make the order a recurring subscription, ensure you select a Subscription Frequency for the order before confirming with the 'Order Tokens' button. **[Image 41]**



41

Remove a Subscription

You can unsubscribe from an active subscription by clicking the '**Unsubscribe**' button next to an active subscription. This will bring a pop-up message to confirm you would like to unsubscribe and where you can select '**Delete**' to remove the subscription from your account. The subscription '**Status**' will be updated to Inactive and no further payments will be taken for this subscription. **[Image 42]**



42

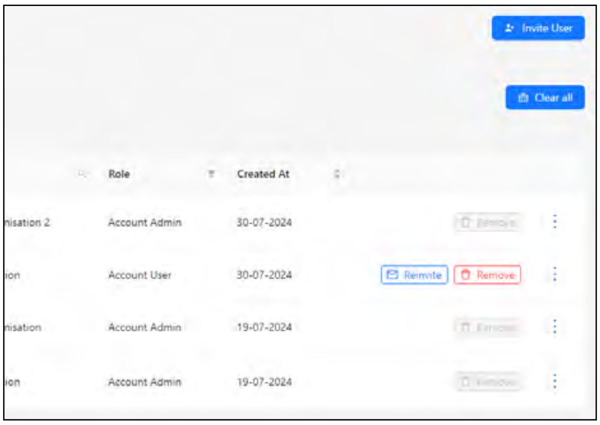
Note: You can filter the content of the orders table using the Date Range and Organisations filters as outlined in the Filters section.

Configurations

The various configurations pages allow you to manage your self-registration link and users as well as define various key settings within your Social Media Check portal.

Users

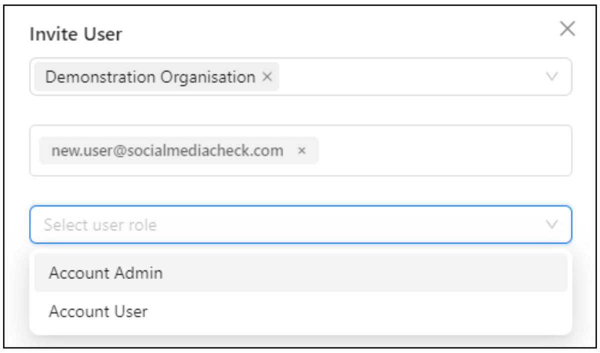
The Users page is where you can manage users and their roles within your organisation. The table on the page will display all active users within your organisation and any sub organisations for your account. **[Image 43]**



43

Add a New User

To add a new user to your Social Media Check portal, you can click the '**Invite User**' button. This will open a pop up where you can enter the email address of the new user you are adding, assign them to your organisation or a sub organisation and select their user role. **[Image 44]**



44

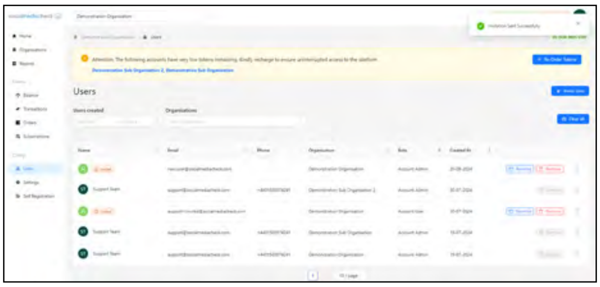
The two user roles you can assign are the following:

Account Admin
Account Admins have full access to your account; they will be able to view and access reports as well as perform any tasks: transferring tokens, creating orders, adding / removing users etc.

Account User
Account Users have a 'read only' access to your account; they will be able to view reports, orders, transactions, users etc. However, they will not be able to action anything (transfer tokens, create orders, add / remove users).

Once these fields have been entered, click '**Invite**' and the user will be added to your account. At this point, they will be sent an automated email to let them know they have been invited to join your organisation's Social Media Check portal. This email will include an invite link where they can set their account password and access to the Social Media Check portal.

You will see the users table has updated to include the new user. You will also see the message 'invited' next to their email address until the user has accessed the link and created their account. Once the user has completed the invitation and set their password, they will be an active user and you will no longer see 'invited' next to their name. **[Image 45]**



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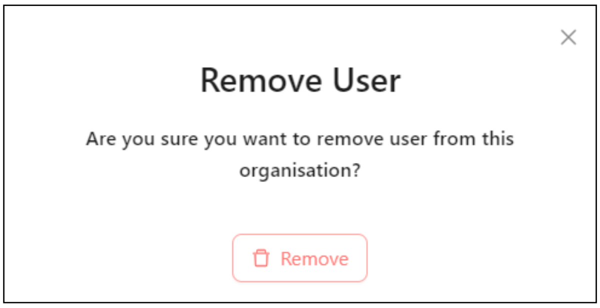
46

Note: If a user has lost the invitation email before setting up their account you can click the blue '**Reinvite**' button on the right side of that user's row in the user table and this will resend the invitation email. **[Image 46]**

Delete a User

To remove a user's access from your Social Media Check portal you can find their email address in the Users table and click the '**Remove**' button to the right of the row with their email address on. You will need to click remove on the pop up to confirm you want to remove the user. **[Image 47]**

Once removed, the user will not be visible in the table and they will no longer be able to access the portal.



47

Settings

The settings page is where you can edit and update your organisations details. To update any of the information on the three pages (Address, Payment, Contact and Support Details) select the field you wish to edit, replace with the updated information and then click the 'Update' button at the bottom of the section to save the changes. **[Image 48]**

48

Self Registration

The self-registration page allows you to define key information for your account's self-registration form. The self-registration form can be used to allow candidates to register themselves to complete a Social Media Check for your organisation. **[Image 49]**

49

To be able to use the Self-Registration form you need to ensure the '**Enable Self Register**' slider is active (this is enabled when the slider is blue in colour).

When the '**Deduct tokens from master**' slider is enabled, tokens will be deducted from the master organisation. When this option is disabled, tokens will be deducted directly from sub organisations.

Send Report to Client will send the report to the account administrator via email for your account when a report is generated. **Send Report to Candidate** will send the report to the candidate who has completed it via email once the report is generated.

Self-Registration Code

There are 2 boxes where you can define a self-registration code for your account. This code is used in conjunction with the registration link to provide authentication and define the scope for the Social Media Check. This code needs to be entered on the Self-Registration form when prompted as a verification step. **[Image 50]**

50

All Posts

Using this code will review all of the posts within a candidate's chosen social media accounts, irrespective of the privacy settings that are in place for the account or posts.

Public Only Posts

Using this code will only review the posts which are publicly available and not protected by a user's privacy setting.

Note: If the '**Org Code**' fields are blank, then you will need to define a registration code in one of the above fields depending on the scope of check you want the candidate to complete and click update in the bottom right to save the changes.

Once you have defined your Social Media Check Self Registration code(s) you can distribute the Self Registration URL link and the self-registration code to any candidates you wish to run a Social Media Check. If you would like the report to check all available posts then provide the 'All Posts' code with the link, however if you only need the check to analyse just publicly available posts then you can provide the 'Public Only Posts' code.

Note: The Self Registration Link and Codes can be copied by clicking the copy icon to the left of the code / link where it's greyed out. **[Image 51]**

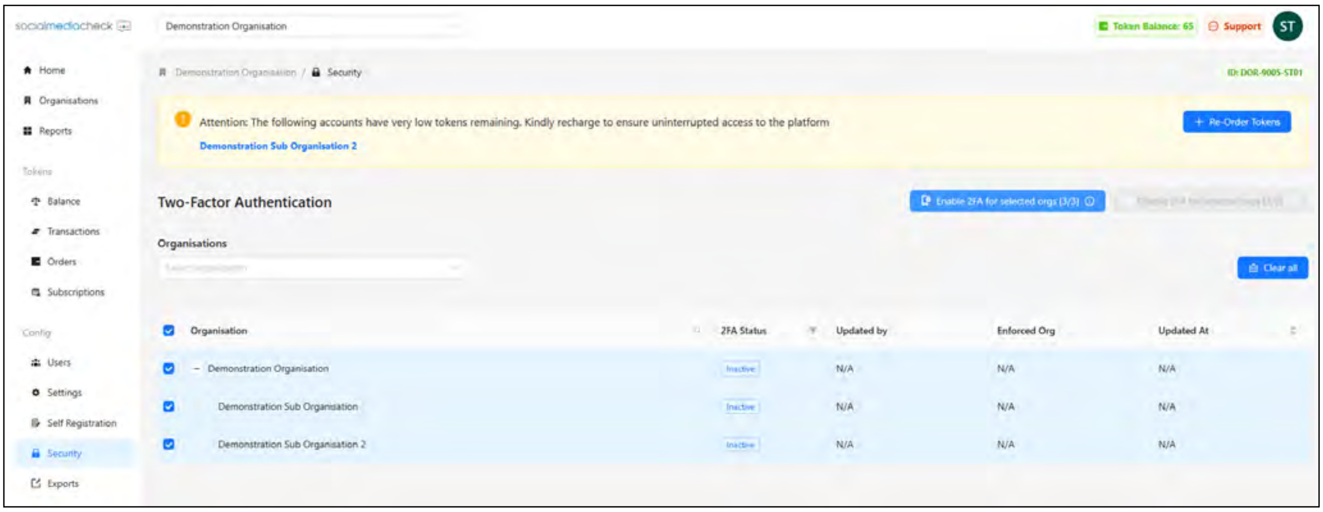
51

If you want to change or update either of the self-registration codes then you can edit the code in the field and save the change by clicking update at the bottom of the page.

Note: Once you have updated the self-registration code the old code will not work with the self-registration URL, only the current active codes can be used to successfully register to complete a Social Media Check.

Security

The Security page is where you can manage the multi factor authentication of your account. Activating / Enabling the Two-Factor Authentication (2FA) enforces a policy on all portal user accounts within your Social Media Check portal so they have to use a second authentication method (alongside their user account password) to verify their account at every login. **[Images 52]**



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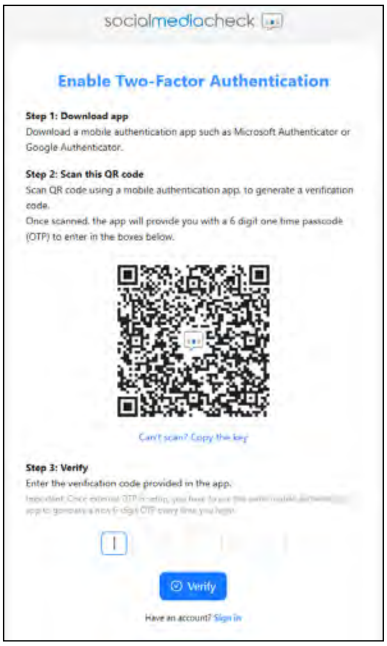
If you enable 2FA on your account, all users with access to your account will be prompted on their next login to download an Authenticator app (E.g. Microsoft Authenticator, Google Authenticator) as a second authentication step for accessing their account.
The steps they will be asked to complete are outlined below.

1. Download a mobile authentication app such as Microsoft Authenticator or Google Authenticator.
2. Scan the onscreen QR code using the mobile authentication app that you have downloaded. This will add the account to the Authentication app and will generate a time-based passcode.
3. Once the account is added to the authentication app, enter the 6-digit one time passcode from your app in the portal to verify your access to the portal.
4 When the correct one-time passcode is entered your login attempt will be verified and you will be directed into your Social Media Check Portal account. **[Images 53]**



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Note: You will need access to the device you have set up 2FA on every time you need to login to your Social Mediua Check portal account, also the one-time passcode will constantly refresh so you will need to go in to your authenticator app to get the active code at the time you are logging in to your account.

If you remove the account from the authenticator app or change your device this 2FA will need to be reset manually.

If you have 2FA enabled on your account you can disable it again by selecting the account(s) which you want to disable 2FA on by clicking the 'Disable 2FA for selected orgs' button at the top of the page. This will remove 2FA for all users within the selected accounts and they will no longer need to use an authentication app on every login.

If you have previously activated 2FA on your account and since disabled it, your account users will need to use the 2FA to sign in to their account before disabling it on their account again, once logged in they will need to navigate to their profile modal > 'manage account' settings panel. At the bottom there will be the option to disable 2FA on your user account by checking the checkbox.

Note: You will only be able to disable 2FA for your user account if all organisations you belong to have disabled it.

If you want to check which user accounts have 2FA enabled or disabled you can view this in the Users page under the column '2FA Status'.

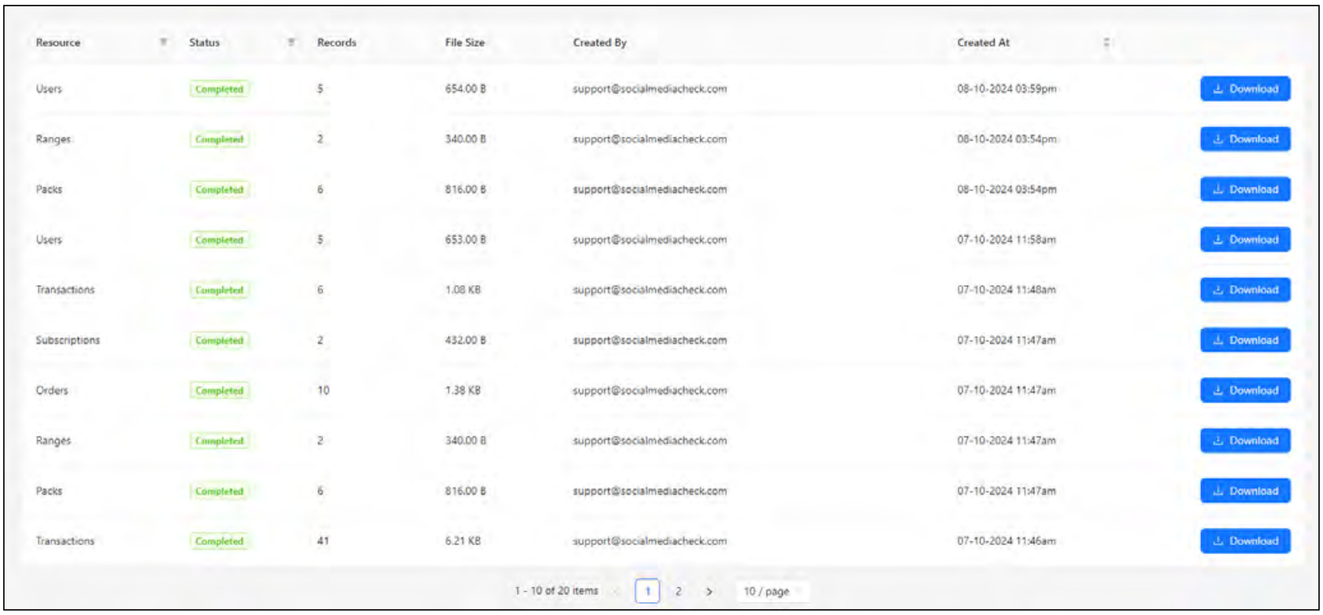
Exports

The Exports page is where you can view and download all data files you have exported from all pages within your Social Media Check portal. If you export data from any page, you will be able to find the completed data export from this page and access any previously exported files.

To Export data from a page within the Social Media Check portal, you can refine the data for the page you are viewing by using the Filters - please see Filters section for more detail. You can then Click the 'Export' button in the top right corner above the table to start the data export. You can then either wait for the data to export or access the export later on form the Exports page.

[Images 54 & 55]

The Exports Page will show a history of all exports from your account including the number of records, file size and who created the export.



Resource	Status	Records	File Size	Created By	Created At	
Users	Completed	5	654.00 B	support@socialmediacheck.com	08-10-2024 03:59pm	Download
Ranges	Completed	2	340.00 B	support@socialmediacheck.com	08-10-2024 03:54pm	Download
Packs	Completed	6	816.00 B	support@socialmediacheck.com	08-10-2024 03:54pm	Download
Users	Completed	5	653.00 B	support@socialmediacheck.com	07-10-2024 11:58am	Download
Transactions	Completed	6	1.08 KB	support@socialmediacheck.com	07-10-2024 11:48am	Download
Subscriptions	Completed	2	432.00 B	support@socialmediacheck.com	07-10-2024 11:47am	Download
Orders	Completed	10	1.38 KB	support@socialmediacheck.com	07-10-2024 11:47am	Download
Ranges	Completed	2	340.00 B	support@socialmediacheck.com	07-10-2024 11:47am	Download
Packs	Completed	6	816.00 B	support@socialmediacheck.com	07-10-2024 11:47am	Download
Transactions	Completed	41	6.21 KB	support@socialmediacheck.com	07-10-2024 11:46am	Download

1 - 10 of 20 items 1 2 > 10 / page

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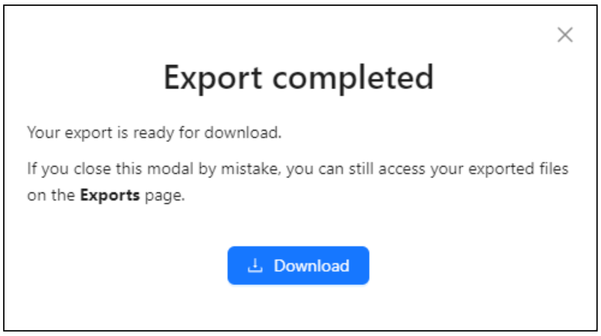

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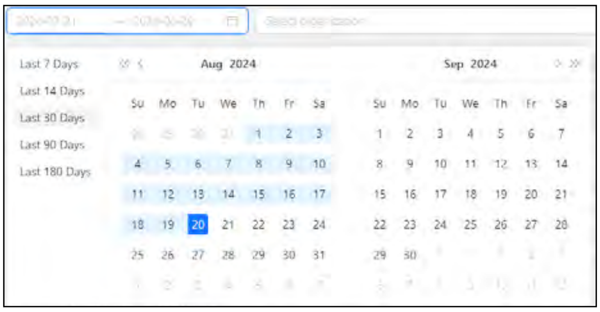
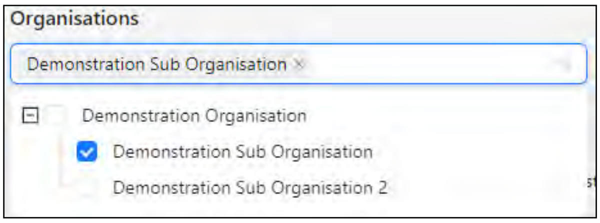
Filters

Date & Organisation Filters

You can filter the table content by using the Date Range filter, which allows you to pick a start and end date for the tractions you want to view, or you can select a predefined period i.e. 'Last 30 Days'. You can filter the transactions to a sub organisation or multiple organisations by selecting these from the Organisations list. You can also filter the Type of transaction ('Added' or 'Used') by selecting this option from the table header.
[Image 55 & 56]



56



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Search Filters

You can filter search on table headers by clicking the magnifying glass icon. This will open a box where you can refine the **search** by clicking search to apply the filter. To clear / remove the filter, you can click **Reset**. To close the filter, you can click **close**. **[Image 57]**

58

You can filter report status, key findings and user role by clicking the funnel icon. This will filter the results only by the options that have been ticked. To use this filter, tick the boxes you would like the table to be filtered on and click **Apply**. To remove the filters on this field, you can deselect all options or click the **Reset** button. **[Image 59]**

59

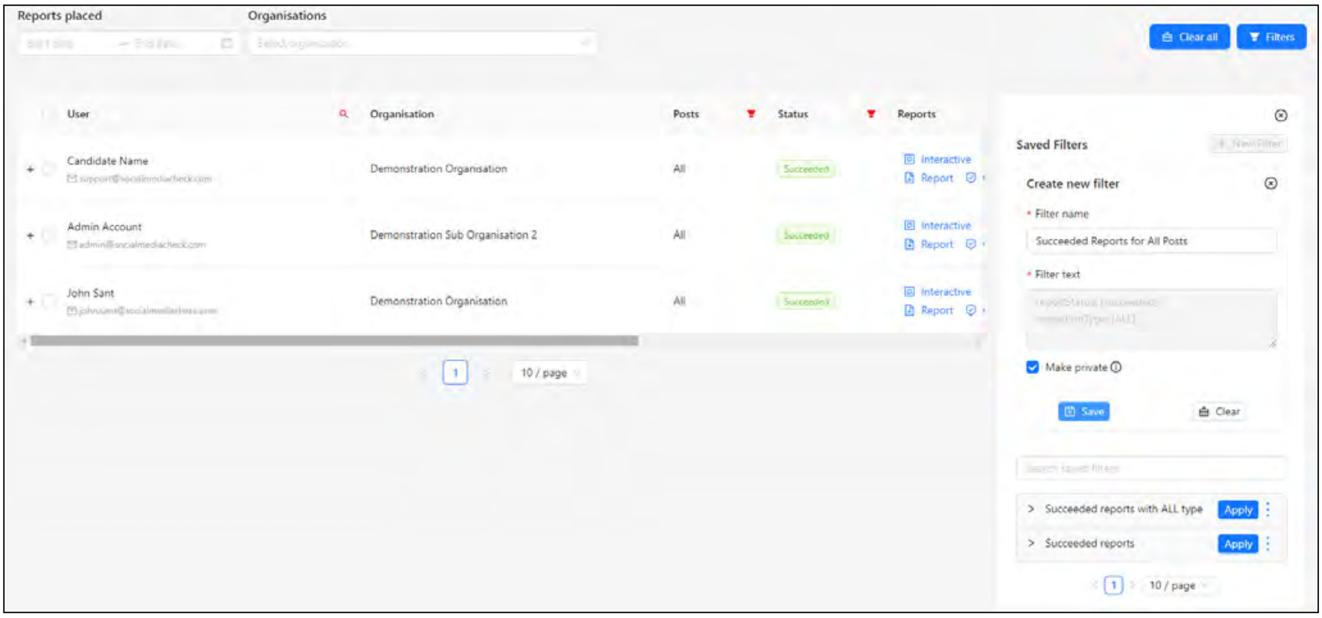
Note: Filters will be applied to the table until each individual filter is Reset or all filters are removed by using the '**Clear all**' button.
[Image 60]

60

Custom Reports Filter

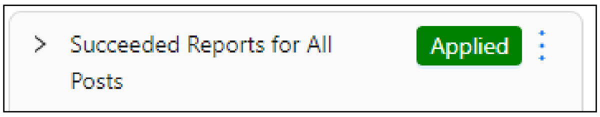
You can create a custom report filter in the Social Media Check portal, this can be useful if you need to filter the reports table on a set of filters and don't want to have to apply each filter individually each time you want to apply it.

To add a custom filter, you will need to apply the filters to the reports table that you wish to create a custom filter for. Once applied, you can click the '**Filters**' button to the right of the reports table to expand the custom filter view. From here, you can add a filter name for the new filter, select who can view it and then click save. **[Image 61]**



61

Once you've saved the custom filter you can apply this filter by clicking **Filters > Apply** next to the filter name. You can clear the filter by clicking the '**Clear All**' button. **[Image 62]**



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Note: You can either make this filter private to you or available for all users within your account by toggling the '**make private**' tick box.

Social Media Check
Registered Office: Mallory House, Goostrey Way, Knutsford, Cheshire, WA16 7GY
Email: hello@socialmediacheck.com
www.socialmediacheck-business.com