



Setup Guide

19th of October 2015

[1] Welcome

Welcome to Outbox Pro, a fantastic social media management tool for you, and also your team.

[2] Download

Outbox Pro is available in different formats from our website

<https://www.outbox.pro/#download>

Currently available are the Windows Desktop App and the Chrome Extension.



If downloading the **Desktop apps** the file will download to your computer. Opening the file will trigger the installation process. The installation will install a shortcut icon on your desktop and a entry in your Start menu.

If installing the **extension from the Chrome Store** you will receive a confirmation screen, which informs you that Outbox Pro can collect data from websites you visit when you choose to harvest link, photo and headline information from a website to use in a post. Clicking 'Add' starts the installation process.

[3] Login and Registration

The Login (or Registration) page follows.

If you have been made a member of a team, you will use the Login details from your Invitation email. This team will be available in your account.

If you are a completely new user, you will need to click on the 'Register' link and "Create an account".

Reset your password → [Forgot password?](#)

Register → [Register](#)

*

*

Keep me logged in

[Log in](#)

Enter your name. If this account is a part of a team, this name will be what other team members see in association with your posts.

An email address is required, and each email address may only be used with one Outbox Pro account. If you wish to join another team, you will need to join that team with another email address.

Your password must have six characters with at least one number and one letter.

If you have a **promotion coupon** code, press the arrow down button to enter.

Create an account

First name

Last name

Email *

Password *

Time zone
(GMT +1:00 hour) Brussels, Copent


Coupon Code (Optional) ▾

[Forgot password?](#)

[Login](#)

[Register](#)

[4] Menu Navigation

The main navigational features are in the upper right hand corner, with a short cut  to the 'Create Content' page where you can start posting to your social media accounts.

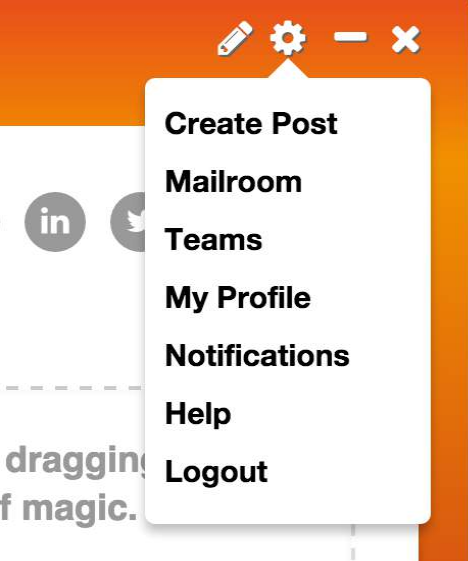
The next section of this guide will go through the screens that will help you setup your account, found under the settings icon.

Note that the pages available depend on the role designation attached to your account

Administration Menu



Manager and Author Menu



[4.1] Menu - Team Selector

It is possible to be a member of many different teams in Outbox Pro. Each team will have its own set of connections that you have access to and people who are members of that team.

Navigate between teams using the Team Selector. This team will stay active until you change it.



[4. 2] Menu - Profile

This screen lets you change your details and add a photo that will represent you within the Outbox Pro account. This is also where your password can be changed.

It is important to enter the **correct time-zone** as the scheduling functions within Outbox Pro will be based on the time-zone indicated here. A drop down menu will show you the time-zones available.

Pressing the **Update button** will **save** the changes you've made.

My profile

First name
Cassidy

Last name
update

Email
cassidy.ortob@outboxpro.co

Time zone
(GMT +12:00) Auckland, Wellington

Change password Update

Click here to save changes

[4.3] Menu - Team

Managers and Authors can view the Connections of teams they are members of. They are also able to view the list of available Approvers.

Admins can view, edit and delete Connections. They can also view, edit and delete all users.

The screenshot displays the 'Your Teams' interface. At the top, the user is identified as Sophia Wilson, an Admin of the Yoga Group. The interface is divided into three main sections: Teams, Connections, and Users.

- Teams:** Includes options for 'Add Team', 'Corporate Accounts', 'Testing connections', and 'Yoga Group' (which is currently selected).
- Connections:** Includes an 'Add Connection' button and lists connections for Facebook (Profile: Demo Uib, Page: SngtIDemo) and Twitter (@Demo UIB).
- Users:** Includes an 'Add User' button and lists the Admin user, Sophia Wilson.

The interface is powered by Outbox Pro and Unified Inbox.

[4.4] Menu - Team

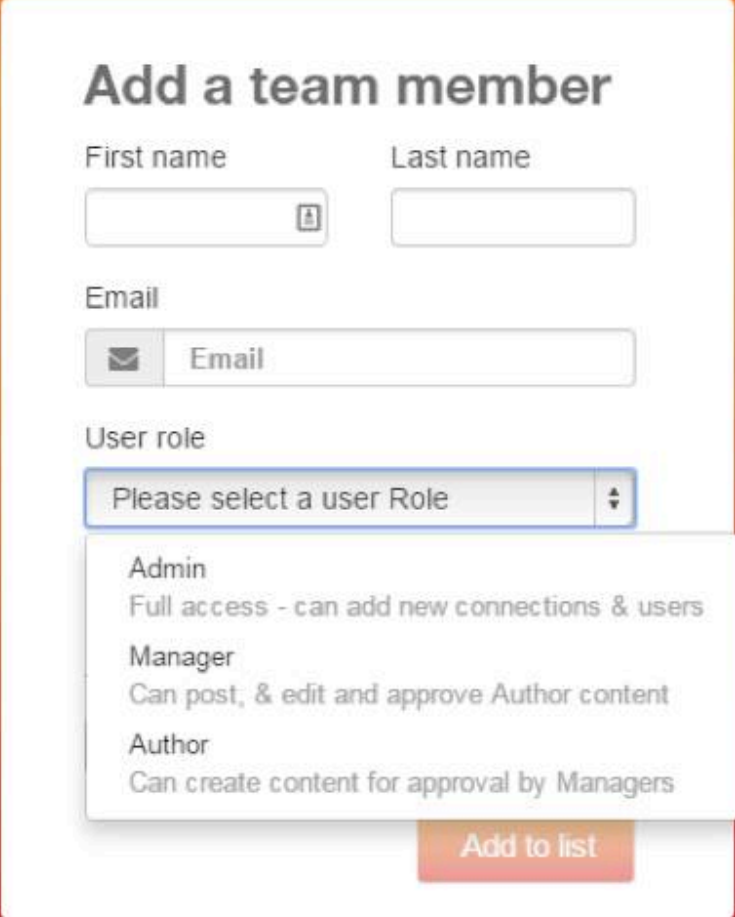
You can only delete or edit Users for Teams in which you are an Admin. Authors and Managers may view Admins and Managers in the team via the Teams option in the Menu.

As an administrator, you can invite other people to use this account and to post to the linked social media platforms.

When the 'Add to List' button is pressed, an email will be sent to the person inviting them to download and sign in to Outbox Pro.

Different levels of authority can be set for the person invited into the account. There are three different authority levels within Outbox Pro that allow the user to perform a set of functions. Only the administrator can set and change authority levels for the account.

- **Admin** – this provides full access, allows user to add social media connections and invite other users into the account. They can also post and approve account.
- **Manager** – this authority level allows the user to post and approve posts by others.
- **Author** – an author account can create a post that needs to be approved by either a manager or administrator.



Add a team member

First name

Last name

Email

User role

Please select a user Role

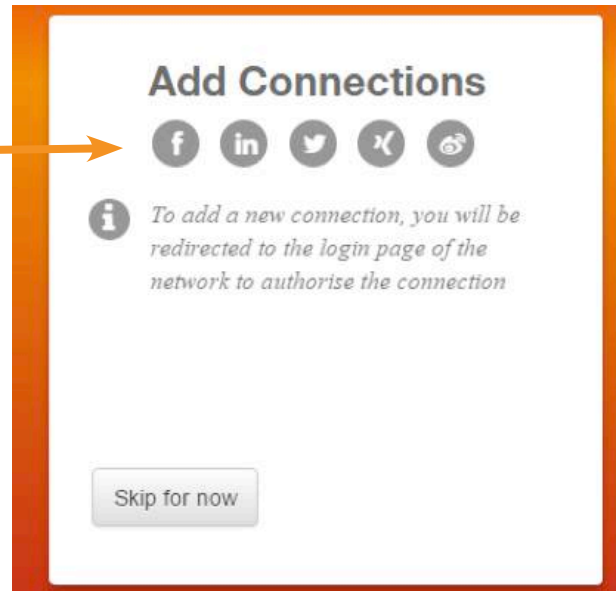
- Admin
Full access - can add new connections & users
- Manager
Can post, & edit and approve Author content
- Author
Can create content for approval by Managers

Add to list

[4.5] Menu - Connections

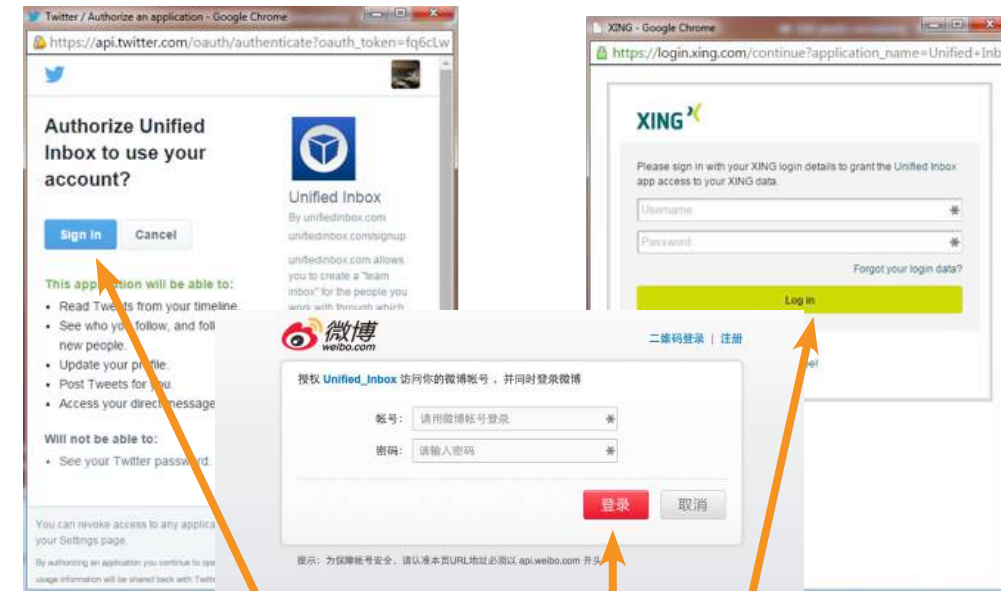
You can only delete or edit Connections for Teams in which you are an Admin. Authors and Managers may view the list of available Connections via the Teams option in the Menu. Before you can start posting, you must establish connections to your existing social media accounts.

Click on the Channel Icon you want to add



Start by clicking on the logo of the social media type you wish to connect to and follow the on-screen prompts.

For Facebook and LinkedIn, Outbox Pro will connect to any account your current computer or device is signed into, all other available social media will need to be signed into manually.

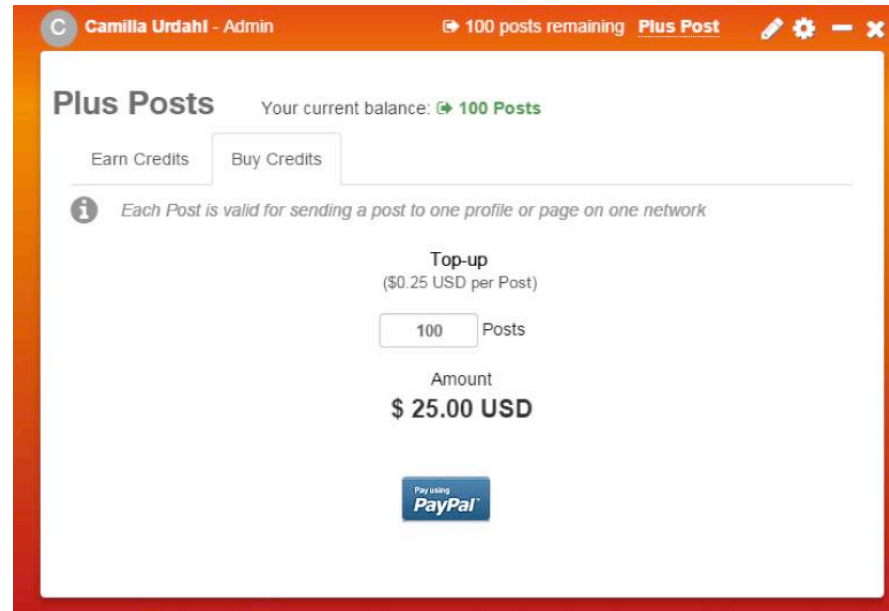


Twitter, Weibo and Xing require that you sign in manually.

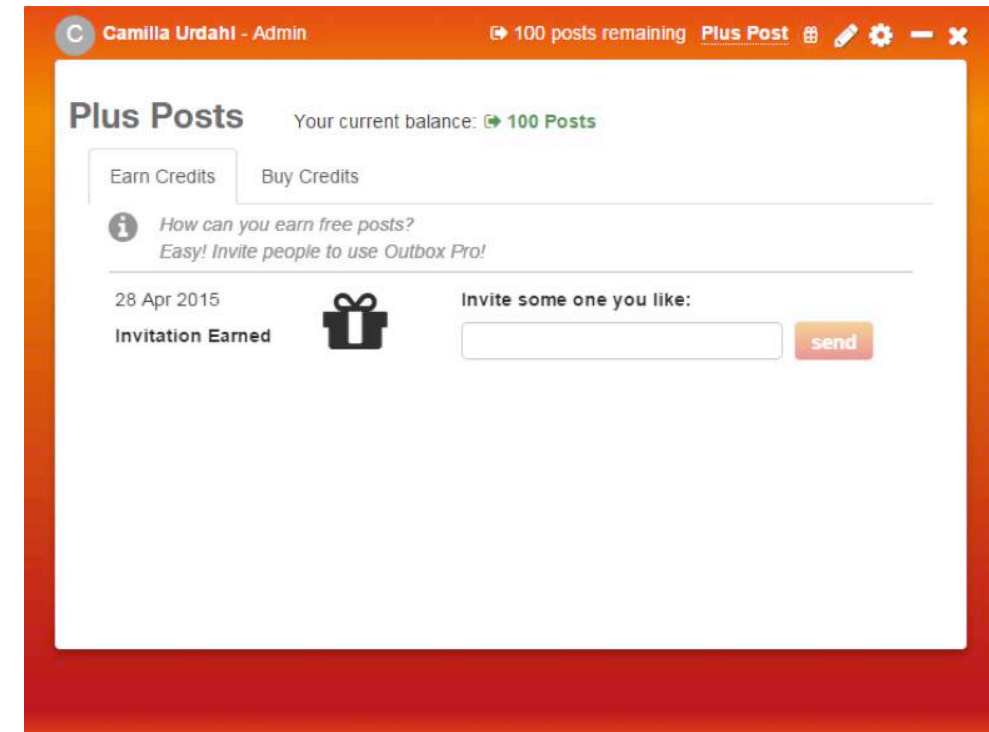
[4.6] Menu - Buy More - Admin only

If the Outbox Pro account is pay per post, this screen allows the administrator to top up the posts for an account. These posts are available to all members of the team.

To increase your post balance specify the amount of credit you want to purchase through Paypal.



Credits can also be earned by bringing new users to the site. When your first credit is awarded you will see the Gift icon in the top bar, click on this to let you friends know about Outbox Pro.



[4.7] Menu - Mailroom

The Mailroom includes the Outbox (posts that are scheduled to post in the future, or are awaiting approval before posting) and Posted tabs (those that have been sent out).

Both tabs include information on who authored the post, to which platforms it was sent and who approved it.



The screenshot shows the Mailroom interface with the 'Posted' tab selected. The interface includes a header with the user's name 'Ursula Hoult', the role 'Admin', and the account type 'Corporate Accounts'. A 'Download Report' button is visible in the top right corner. The main content area displays a table of posted posts.

Posted on	Network	Author	Approver
Wed 14 Oct 2015 11:31 AM	Twitter	Sophia W	Ursula H
Wed 14 Oct 2015 05:00 AM	Facebook, Twitter	Ursula H	Ursula H
Mon 12 Oct 2015 07:50 PM	Facebook	Ursula H	Ursula H
Sun 27 Sep 2015 06:00 AM	Facebook, LinkedIn, Twitter, Google+, X	Ursula H	Ursula H
Sun 27 Sep 2015 03:00 AM	Facebook, LinkedIn, Twitter, Google+, X	Ursula H	Ursula H
Sat 26 Sep 2015 11:45 PM	Facebook, LinkedIn, Twitter, Google+, X	Ursula H	Ursula H

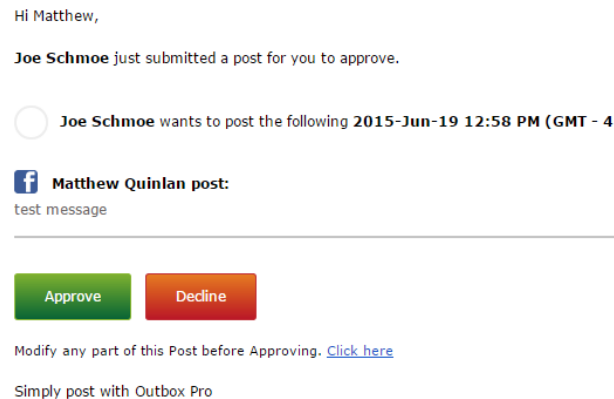
The interface also features the 'outbox PRO' logo at the bottom left and 'powered by unified inbox' at the bottom right.

[4.8] Menu - Notifications

The Notifications section allows you to customize when you will receive emails that will alert you about changes related to posts.

By default all options are set to “on” as seen by the orange marker. All options are able to be turned off by clicking the orange button, doing this will change it to gray and your change will be automatically saved.

If you are an admin or manager you will be able to approve posts directly from the email you receive and the user will receive a notification of your decision.



[4.9] Menu - Help

For further help with Outbox Pro's features, or any technical query, the 'Help' option in the Settings menu will establish a link to the Outbox Pro query form.

This will be sent to us and we will reply to the email address you include



How can we help?

Name *

E-Mail *

How can we help? *

Submit

[4.10] Menu - Log Out

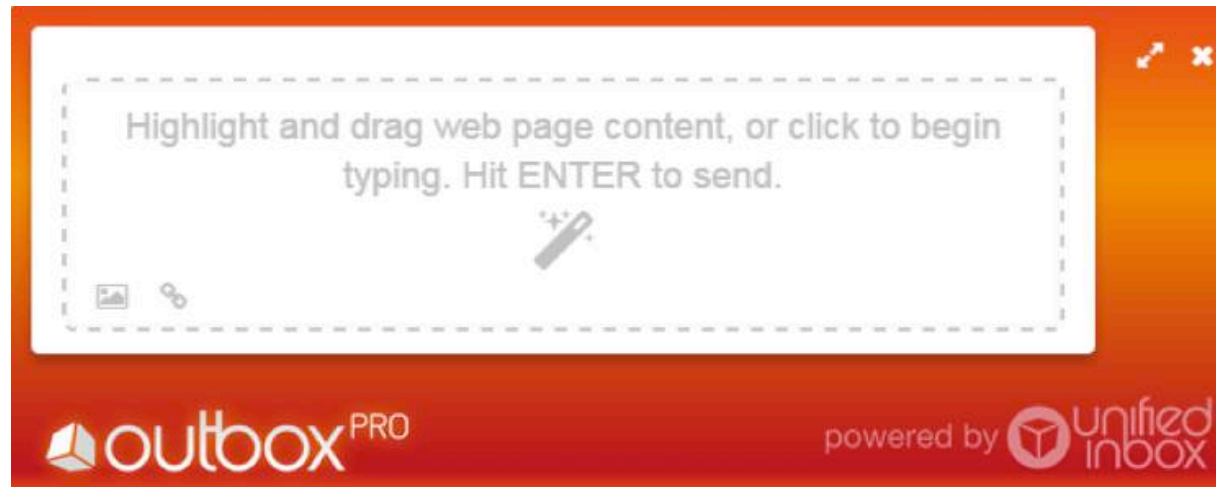
The last option in the Settings menu is the log out. You will need to use this to move between different Outbox Pro account.

It is also important to log out if you are using a computer accounts with multiple users, to stop unwanted parties accessing to your Outbox Pro account.

[5.1] Create Content - minimized

There is a short cut and a full version of the Create Content page. The short cut screen below is what appears every time Outbox Pro is launched after set up is complete.

A post can be started here by dragging content from a website or typing directly into the white screen.



If you start typing, Outbox Pro will automatically attach the link from the page you are posting from. This can be removed if it is unwanted by pressing the 'x' next to the content.



The main image of the website will automatically be harvested and included, or another image can be added directly from your device.

Dragging in content or hitting the Enter key will convert the post into the full 'Create Content' page, which can also be reached through the setting menu.

[5.2] Create Content - full view

To complete the post, the **social media platforms** to post to must be selected. One or more can be selected for the post.

For accounts set up to pay per post, this page also shows the **number of posts** you have remaining on your **account balance**. If it is running low, the Plus Post link will take you to the top up page.

Additional **text content** can be added, as can an **image**. The link and content harvested from the website can be removed by pressing the 'x'.

The shortened link can also be converted back to a **full URL** with pressing 'unshorten'.

The **date and time** can be scheduled if the post is not intended to be immediate.

If you have authority to post directly, your name will appear in the approval box, else the **approver must be picked** before the post is sent.

The screenshot shows the 'Create content' interface in the Outbox Pro application. The interface is framed by an orange border. At the top, a yellow bar displays the user's name 'Franziska Mueller', a notification badge with '71', and the role 'Manager' for the 'Unified Inbox marketing group'. Below this, the 'Create content' title is followed by social media icons for Facebook, LinkedIn, Twitter, and a plus sign. A large text input area contains the instruction: 'Start typing or add content by highlighting it and dragging it here. OutboxPRO will do the rest: it's a kind of magic.' Below the text area is a link input field with a shortened URL 'http://uib.li/1gc3tHS' and an 'unshorten' button. To the right of the link field is an 'Add an Image' button. Below the link field is a preview area for an image of a smartphone displaying an 'Approve' button. To the right of the preview is the text 'Outbox Pro - the cloud-based social business tool' and a description. Below the preview is a 'replace image' button. To the right of the preview is an approval section with the text 'For approval by:' and a dropdown menu showing 'Franziska Mueller'. Below the dropdown are 'Today' and 'Now' buttons, and a 'Send' button. A 'clear content' button is located below the 'Send' button. The bottom of the interface features the 'outbox PRO' logo and the text 'powered by unified inbox'. Annotations with orange arrows point to various elements: 'Add an Image' points to the image icon; 'Remaining Posts' points to the '71' badge; 'Choose your Connections' points to the social media icons; 'Choose an Approver' points to the dropdown menu; 'Edit selected previews' points to the 'replace image' button; 'Shorten/Unshorten Links' points to the 'unshorten' button; and 'Schedule a Time' points to the 'Today' and 'Now' buttons.

[5.3] Create Content - Confirmation

A confirmation page will appear so you can check the choices you have made before clicking the final Send button. If you wish to modify the post before Sending, simply click Modify.

If the post requires approval before sending, the approver will get an email asking them to approve, decline or modify it.

If the post is scheduled for a future time, it will go to your Outbox until that time.

If the post does not require approval and is not scheduled for the future, it will post immediately.

The screenshot shows a confirmation window for a social media post. At the top, it displays the user's name 'Franziska Mueller' and the group 'Unified Inbox marketing group'. The main content area is titled 'Confirmation' and shows the post content: 'Check out this awesome tool !'. It also indicates 'To be used: 3 Posts (68 remaining)'. Below the content, there are two buttons: 'Modify' and 'Send'. The 'Modify' button is highlighted with an orange arrow pointing to it from the text 'Choose to modify if needed' below the window. The 'Send' button is a red button. At the bottom of the window, there is a section for approval: 'For approval by: Admin Ursula' and 'To be released: Immediately'. The window is framed by an orange border with the 'outbox PRO' logo at the bottom left and 'powered by unified inbox' at the bottom right. Two orange arrows at the top point to the 'Selected Platforms' (Facebook and LinkedIn icons) and 'Post Usage' (To be used: 3 Posts (68 remaining)) sections.

Selected Platforms

Post Usage

Confirmation

To be used: 3 Posts (68 remaining)

Profile : Demo Uib

Page : SngtlDemo

Check out this awesome tool !

Outbox Pro - the cloud-based social business tool

Outbox Pro is the cloud-based social business tool that makes it faster and easier to manage and control all of your social media channels.

For approval by: Admin Ursula


To be released: Immediately

Modify

Send

Choose to modify if needed

Unified Inbox Pte Ltd
www.unifiedinbox.com
support@unifiedinbox.com
Version number: 1.26.36

A solid orange horizontal bar spanning the width of the page at the bottom.