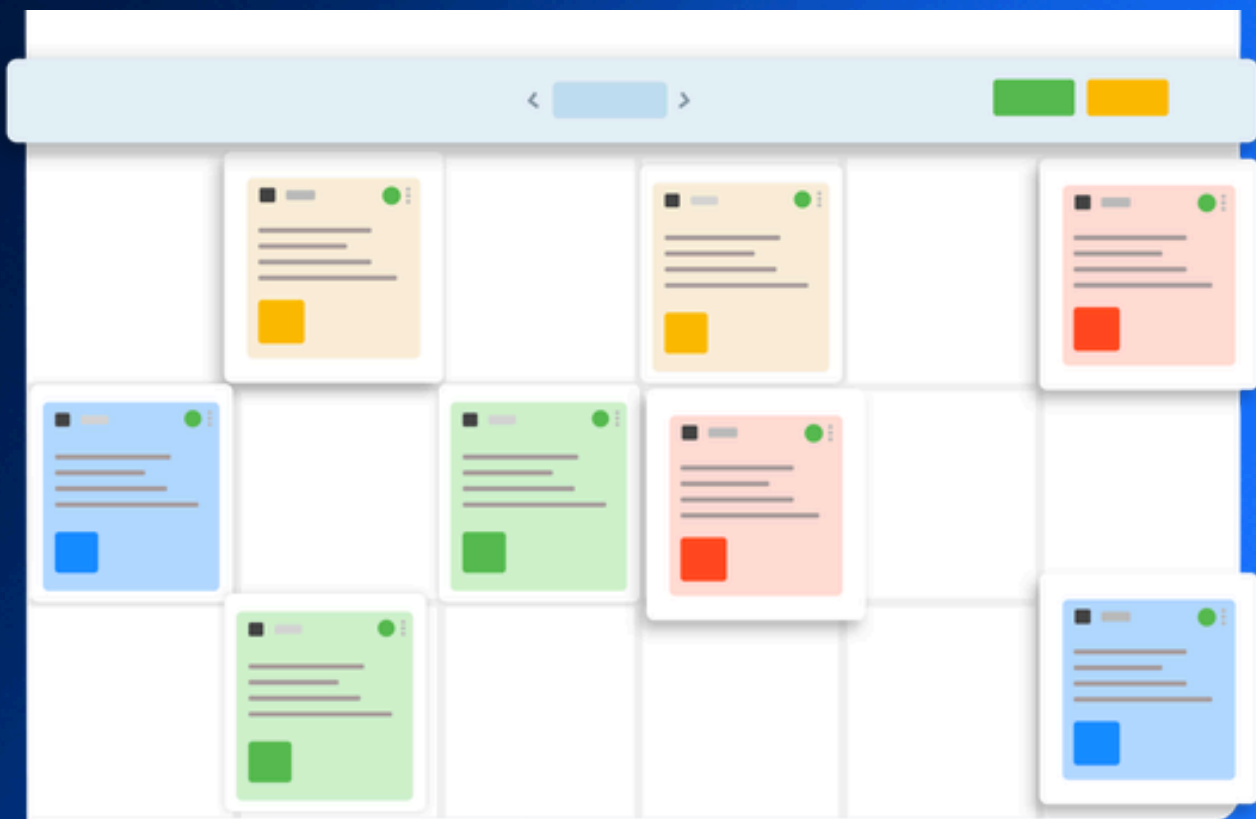


REFERENCE GUIDE

Social Planner

Plan, schedule, and publish with ease



Planner Views and Filters

What It Is

The Planner is a calendar of every draft, scheduled, and published post. List View shows the same posts as a list, and filters help you find any post fast.

How It Works For Your Business

- Search for Social Planner. You land on the Planner tab, a calendar with posts on their dates.
- Switch the Planner to list view to see the same posts in a list.
- Click Filters to narrow by status (draft, scheduled, published, failed) and by account.
- Type a word in the search bar to find a post that contains it.
- Click Save as New View to keep a filter setup for one-click use later.

Planner Views and Filters – Tips & Guidelines

Tips

- Use the calendar to spot empty days at a glance.
- Use List View when you need one specific post.
- A failed post tried to go out and could not, so check that status often.
- Account filter wording may differ, so look for channel or account.

DO

- Check the calendar for gaps
- Filter by status to find failures
- Save filters you use often
- Search by a word in the post

DON'T

- Scroll the calendar to find one post
- Ignore failed posts
- Rebuild the same filter each time
- Assume every account is selected

Connecting Social Accounts

What It Is

Nothing posts until an account is connected. Connections live on the Settings tab under Social Accounts, and each platform has its own rules and sign-in.

How It Works For Your Business

- Click the Settings tab, open Social Accounts, then click + Connect Social and choose a platform.
- Facebook needs a page where you are an admin. Personal profiles cannot be posted to.
- Instagram connects directly with an Instagram login, or through a linked Facebook page.
- LinkedIn connects a personal profile, a business page, or both. Google Business asks you to pick a location.
- TikTok, YouTube, and Pinterest follow the same sign-in and approve pattern. X may be unavailable.

Connecting Social Accounts – Tips & Guidelines

Tips

- Choose all pages when Facebook asks, so you do not repeat the step.
- Start Instagram with the direct option if you are unsure.
- Connect a TikTok Business profile to manage comments in the planner.
- If a platform is missing from your connect list, it may depend on account or plan.

DO

- Sign in with the profile that is the admin
- Check each account shows connected
- Reconnect when a login expires
- Read each popup screen carefully

DON'T

- Try to connect a personal Facebook profile
- Ignore a disconnected warning
- Sign in to the wrong LinkedIn login
- Skip checking the connected list

Creating and Publishing Posts

What It Is

A post starts from New Post. You pick accounts, write a caption, add media and extras, then choose to post now, schedule, or save a draft.

How It Works For Your Business

- Click New Post and choose the regular create post option. Menu names change over time.
- Click the connected accounts you want, then type your caption. You can paste a link in the text.
- Use the Image or Video button to upload from your computer. A media library option may also appear.
- Look for # for hashtags, tagging a profile, a location, and Add Follow-up Comment.
- Choose Post Now, Schedule with a date and time, or Save as Draft. Scheduled posts show on the calendar.

Creating and Publishing Posts – Tips & Guidelines

Tips

- Write the caption before adding media.
- Use a handful of fitting hashtags instead of many.
- Put links or extra hashtags in the follow-up comment to keep the caption clean.
- Edit a scheduled post from the calendar instead of deleting it.

DO

- Check date, time, and accounts
- Keep drafts for unfinished ideas
- Open scheduled posts to edit them
- Use the follow-up comment box

DON'T

- Schedule without checking accounts
- Delete and restart to make a change
- Fill in options a platform grays out
- Forget to save your draft

Customizing Posts Per Platform

What It Is

Customize for Each Channel gives every chosen platform its own caption, media, and extra fields, so one post can fit each platform's limits and style.

How It Works For Your Business

- Pick two or more accounts. The Customize for Each Channel toggle appears once you do.
- Turn it on and each platform gets its own tab with its own caption and media.
- Click each tab to find extra fields, such as a Pinterest board and title or a YouTube title and privacy setting.
- Watch the character counter or preview, if shown, before you schedule.
- Turning the toggle off returns everything to one shared post and custom versions are lost.

Customizing Posts Per Platform – Tips & Guidelines

Tips

- Write for the shortest limit first, then expand.
- Instagram captions top out at 2,200 characters and LinkedIn at 3,000.
- If a video is rejected, check its length and size against the limits first.
- Look at every preview, since images can crop differently.

DO

- Read the warning before turning it off
- Check each platform's tab
- Respect each platform's limits
- Preview before you schedule

DON'T

- Memorize every field
- Paste one long caption everywhere
- Ignore a missing required field
- Trust limits without checking the screen

Reels, Stories and Short Video

What It Is

Short video and Stories have their own post types. You can set a cover for a Reel, publish Shorts to YouTube, and build Stories, with some publishing through your phone.

How It Works For Your Business

- Look for the Reel post type for Instagram, plus a cover or thumbnail choice, and a Reel option for Facebook.
- For YouTube, choose between a Short and a long video when you schedule.
- Use the Instagram Story composer and the Facebook Story option to create Stories.
- Stories are published through a mobile push notification, so keep the mobile app ready.
- Look for Facebook text posts with backgrounds, and LinkedIn carousels made from a PDF.

Reels, Stories and Short Video – Tips & Guidelines

Tips

- Pick a cover that reads well at small size.
- Check video length and size against each platform's limit.
- Confirm on screen which post types your accounts offer.
- Allow notifications on your phone so Stories can go out.

DO

- Choose the right post type first
- Add a cover to your Reel
- Test the mobile notification
- Check video limits

DON'T

- Treat Stories like regular posts
- Ignore the push notification
- Upload an oversized video
- Assume every account has every type

Hashtags, Categories and Recurring

What It Is

Hashtag groups save sets of hashtags you reuse. Categories label posts. Recurring posts repeat on a schedule you choose, and Best Time to Post offers a time suggestion.

How It Works For Your Business

- Click the # button, create a hashtag group with a name and its hashtags, then Save and Apply.
- Reuse the group any time from the same # button.
- Assign a category or tag to a post to keep your content organized.
- Choose recurring and pick Daily, Weekly with chosen days, Monthly, or Yearly, plus a time.
- Delete a recurring series when you no longer want it. Look for Best Time to Post in the scheduler.

Hashtags, Categories and Recurring – Tips & Guidelines

Tips

- Name hashtag groups by topic so they are easy to find.
- Use categories consistently so they stay useful.
- Check the first recurring post before trusting the series.
- Treat a Best Time to Post suggestion as a hint, not a rule.

DO

- Save hashtag groups by topic
- Use clear category names
- Pick days for weekly series
- Delete series you do not need

DON'T

- Retype the same hashtags
- Make a new category every post
- Set recurring and forget it
- Skip checking the time

Queues, Templates and Bulk CSV

What It Is

Category queues fill planned time slots from a category. Templates give ready-made designs, and Upload from CSV schedules many posts at once from a spreadsheet.

How It Works For Your Business

- Choose Category Queue from New Post, pick or create a category, set publishing days and time slots, and add posts.
- Drag posts to reorder them. Use the Content tab, then Category Queue, to edit or reschedule a queue.
- Choose Social Planner Templates, pick a Post or Story and Reel size, then Continue and Review & Schedule.
- Choose Upload from CSV, download the Basic or Advanced template, and fill in date, time, accounts, content, and media columns.
- Upload the file, fix any flagged rows on the review screen, and note the 90-post limit. RSS URL scheduling is an alternative.

Queues, Templates and Bulk CSV – Tips & Guidelines

Tips

- Start with the Basic CSV template and move to Advanced only if needed.
- Fix flagged rows before importing.
- Check the calendar to confirm imported posts landed where expected.
- Look for a send for approval checkbox if your team needs review.

DO

- Fill every required column
- Review the error screen
- Reorder queue posts by dragging
- Keep imports under 90 posts

DON'T

- Upload without reading errors
- Mix up date and time formats
- Skip the calendar check
- Overfill one import

Post Approval Flow

What It Is

Approval lets a person review a post before it goes live. The approver can view, edit, approve, reschedule, or reject with comments.

How It Works For Your Business

- When composing, choose to schedule the post for approval, pick the approver, and add an internal note.
- Open the Content tab, then Approval, to see waiting posts.
- The approver can view or edit, approve, reschedule, or reject with a comment.
- An approval email template lives in Notifications (search for it).
- An external link approval flow lets reviewers approve without logging in. Manage Social Planner email notifications there too.

Post Approval Flow – Tips & Guidelines

Tips

- Write a clear internal note for the approver.
- Reject with a comment so the writer knows what to fix.
- Check your notification settings so approvers see requests.
- Confirm labels on screen, since wording may differ.

DO

- Pick the right approver
- Add a helpful note
- Leave comments on rejects
- Review notification emails

DON'T

- Send approval requests with no note
- Reject without saying why
- Forget to check the Approval tab
- Skip notification settings

Statistics, Comments and Fixes

What It Is

Statistics show how connected accounts perform. Manage Comments lets you reply inside the planner. AI, watermarks, and failed post fixes finish the toolkit.

How It Works For Your Business

- Open Statistics, pick an account, and filter by platform or All to see posts, likes, followers, impressions, reach, and engagement.
- Check Top Performing Posts and the weekly comparison. Per-post stats appear for several platforms.
- Use Manage Comments to reply from inside the planner. Post Sync pulls in posts published natively.
- Use Content AI from New Post to draft captions with Brand Voice fields. Add and manage watermarks in settings.
- For a failed post, read the error, check for a disconnected-account banner, and reconnect if needed.

Statistics, Comments and Fixes – Tips & Guidelines

Tips

- Compare the same account week to week.
- Edit an AI caption so it sounds like you.
- Read the failed post error before retrying.
- Reconnect the account first if you see a disconnected banner.

DO

- Read the error on failed posts
- Edit AI drafts
- Reply to comments in one place
- Keep watermarks tidy

DON'T

- Publish AI text unedited
- Retry without reading the error
- Ignore a disconnected banner
- Compare unlike accounts

Key Terms Glossary

Planner

Calendar home base showing every draft, scheduled, and published post.

List View

A view that shows posts as a searchable list.

Status

Where a post is: draft, scheduled, published, or failed.

Saved view

A filter setup kept with Save as New View.

Social Accounts

The Settings tab where connected accounts are managed.

Caption

The text of a post.

Follow-up comment

A comment posted on your own post right after it goes live.

Draft

A saved, unfinished post that does not publish.

Customize for Each Channel

Toggle that gives each platform its own caption and media.

Hashtag group

A saved set of hashtags you can reuse.

Category queue

A set of time slots that publishes posts from one category.

Failed post

A post that tried to go out and could not.

Getting Help

Your software changes over time, so a button or menu may be named or placed differently than shown here. If something looks different, open the Social Planner's own in-app help or the help center for the latest steps.