



WELCOME TO THE SOCi FAMILY

The Solution Built for Coterie Insurance Local Agents

This document is intended to provide a high-level overview on **System Users** and how they can be applied to your account in SOCi. If you have any questions regarding any of the information presented in this document, please reach out to onboarding@meetsoci.com.

What is “System User” at a high level?

A system user is a specific user-type which is associated with Facebook Business Manager that utilizes a token which indefinitely persists unless you specifically revoke access through Business Manager or unlinks the SOCi App from Business Manager.

What value does this add to you?

Utilizing a system user will dramatically decrease the amount of posting errors that we see through SOCi, as the system user will not be affected by individual permissions updates, password changes, etc. unless explicitly done so by an Administrator of the Business Manager within Facebook.

How does it work?

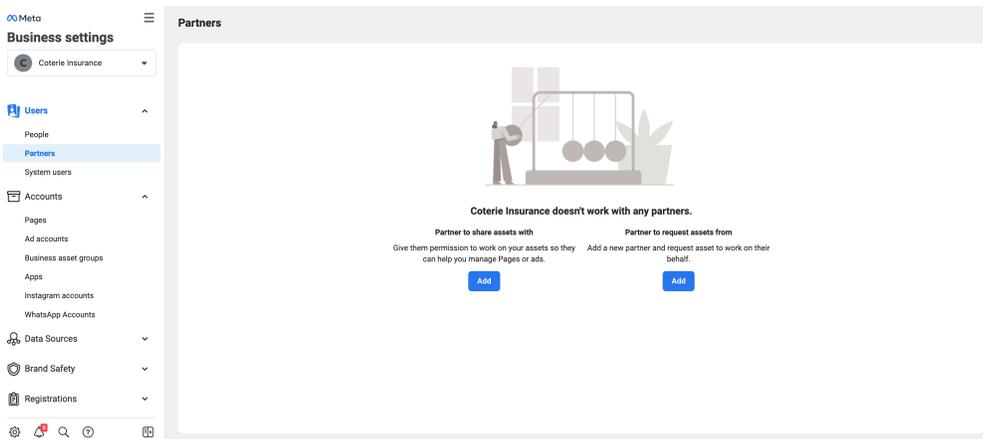
System users live within a Business Manager and can use their persistent tokens with the Facebook Pages which are also linked to that Business Manager. General info on system users from Facebook can be found [here](#).

SOCi currently supports only one Business Manager per account, so in order to get you set-up, you will need to share business page access to the main Coterie Insurance Business Manager.

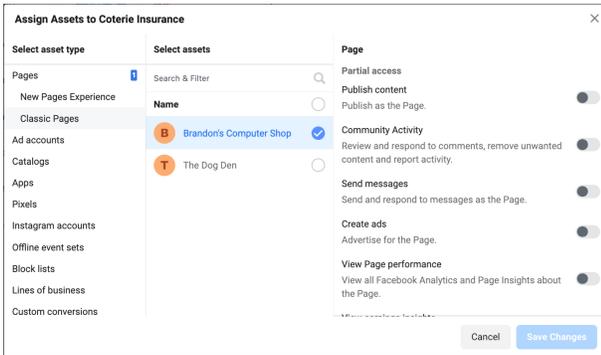
Here is a high-level overview of the different options for setting this up:

Option 1: Setup Business Manager Partnership (For Agents that use Facebook Business Manager)

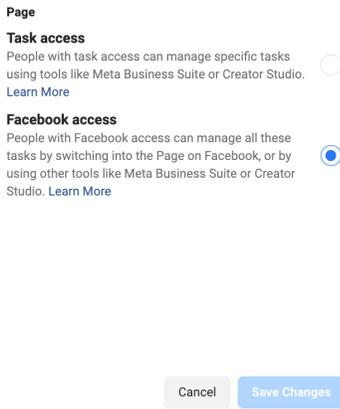
1. If you currently manage your Facebook business page through a business manager, you can establish a partnership between your business manager and the Coterie Insurance corporate business manager.
2. To do this, login to your business manager and navigate to Users > Partners under Business Settings.



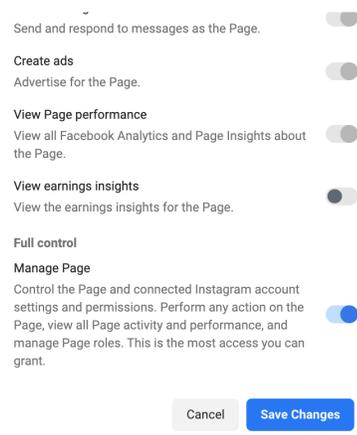
3. Click the blue 'Add' button under the 'Partner to share assets with' option.
4. Input the following Partner business ID: 448912319277831
5. Click Next
6. Select your Facebook business page under the Select Assets section. Your page(s) will be found either under New Pages Experience or more commonly, the Classic Pages section.



7. If your business page is a part of the New Pages Experience, you will want to provide full Facebook access in the right-hand section.



8. If your business page is a part of the Classic Pages, you will want to provide full control to manage the page in the right-hand section.



9. Click Save Changes.
10. This will provide the necessary shared access to establish system users on your account.

Option 2: Provide shared access natively on your Facebook business page (For Agents that do not use Facebook Business Manager)

1. If you currently manage your Facebook business page outside of a business manager through your personal Facebook account, you can provide shared access to your page natively.
2. First you will need to send the SOCi onboarding team the public facing URL for your Facebook business page. Ex: <https://www.facebook.com/CoterieIns>. You can send this directly to onboarding@meetsoci.com and state that you would like our team to request admin access through the corporate Coterie business manager.
3. The SOCi onboarding team can send a request through the Coterie Insurance corporate business manager using your Facebook business page URL for shared access to the page. The SOCi onboarding team will confirm once the request has been sent.
4. Once you have received confirmation that the request has been sent, you will need to go through some steps to accept, see below:
 - a. Be sure you are logged into your personal Facebook account that has admin access to your Facebook business page.
 - b. Navigate directly to your Facebook business page.
 - c. On the left-hand side, click Settings.
 - d. Again, on the left-hand side, click Page Roles.
 - e. There you will see a pending partner request coming from **Coterie Insurance**.
 - f. Click **Respond to Request** and go through the steps to approve.
5. Once you have completed the steps, please confirm by replying to the email thread with the SOCi onboarding team.