

CUSTOMER ONBOARDING

SocialMind Setup Guide

Everything a customer needs to go from sign-up to publishing live posts across Instagram, Facebook, LinkedIn and X. Follow the steps in order — the whole thing takes about 30 minutes if your accounts are ready.

What this document covers

Signing up and creating a workspace, verifying email, inviting your team.

Picking a plan and paying through Razorpay (card, UPI, netbanking).

Connecting Instagram, Facebook, LinkedIn and X — including prerequisites, the exact buttons to click on each provider, and the permissions requested.

Daily workflow: uploading media, writing a post, approvals, scheduling, and reading analytics.

Security, data handling, troubleshooting and how to reach support.

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BEFORE YOU START

1. Overview & what you need

SocialMind is a workspace where your team plans, writes, approves and publishes social posts across Instagram, Facebook, LinkedIn and X from one place. To use it end-to-end a customer needs three things ready: access to the social accounts they want to post to, a work email they control, and a payment method once the trial ends.

Accounts you must have

- A work email you can receive mail at (used for verification).
- A **Facebook Page** you administer. Instagram publishing is routed through this Page too.
- Your Instagram account set to **Business or Creator** and linked to that Facebook Page.
- A **LinkedIn Company Page** where you are Super Admin or Content Admin.
- An **X (Twitter)** account with login access.
- A debit or credit card, UPI, or netbanking for Razorpay.

Roles inside SocialMind

- **Admin** — billing, members, connected accounts, everything.
- **Editor** — drafts posts, uploads media, submits for approval.
- **Approver** — approves or rejects drafts, cannot publish directly.
- **Viewer** — read-only access to calendar and analytics.

Trial & billing

Every new workspace starts on a **14-day free trial** of the Pro plan — no card required to begin. You add payment when the trial ends or when you upgrade.

STEP 1

2. Sign up and create a workspace

Go to [/signup](#) and complete this form.

Field	What to enter	Required
Full name	Your name as teammates should see it.	Yes
Work email	Your company email. This becomes your login.	Yes
Password	At least 10 characters, mix of letters and digits.	Yes
Workspace name	Your company or brand (e.g. 'Northwind'). Shown in headers.	Yes
Industry	Picks sensible defaults for AI tone and hashtags.	Optional
Timezone	All scheduled times use this.	Yes

Field	What to enter	Required
Default language	Primary language the AI writes in. Overridable per post.	Yes

One workspace per company

Every workspace is strictly isolated — users, posts, media and analytics cannot be seen across workspaces. If your agency manages several brands, create one workspace per brand or ask us about the Agency plan which lets you switch between them from one login.

STEP 2

3. Verify your email

1 Check your inbox

You will receive an email from **no-reply@socialmind.in** with the subject 'Confirm your SocialMind account'.

2 Click the verify link

The link is valid for 24 hours. If it expires, use **Resend verification** on the login screen.

3 You are signed in

You land back on SocialMind, now signed in to your new workspace.

Didn't get the email?

Check Spam / Promotions folders. If still missing, click **Resend verification** on the login screen. The sender is **no-reply@socialmind.in** — allow-list it in your mail provider to be safe.

STEP 3

4. Invite your team

Open **Settings** → **Members** and click **Invite**. Each invite requires:

Field	What to enter	Required
Email	The teammate's work email.	Yes
Role	Admin, Editor, Approver, or Viewer. See role matrix on page 1.	Yes
Message (optional)	A note that goes inside the invite email.	Optional

Each invited user receives an email with a one-click join link that expires in 7 days. Pending invites are listed on the same page and can be revoked at any time.

STEP 4

5. Choose a plan and add payment

SocialMind charges via **Razorpay**. You are redirected to Razorpay's secure checkout — we never see or store your card details.

1 Go to Settings → Billing

Click 'Change plan' and pick Starter, Pro or Agency.

2 Fill billing details

Business name, GSTIN (if applicable), billing address and country. These appear on your tax invoices.

3 Enter payment on Razorpay

Card, UPI, netbanking or wallet. Razorpay auto-charges you on each renewal — you can cancel any time from Billing.

4 Receive invoice by email

A GST-compliant invoice is emailed after every successful charge and is also available under Billing → Invoices.

Switching plans

You can upgrade instantly — the difference is pro-rated on your next invoice. Downgrades take effect at the end of the current billing cycle so you don't lose features you've already paid for.

STEP 5

6. Connect Instagram & Facebook (via Meta)

Instagram and Facebook are connected together through one authorization called **Facebook Login for Business**, because Instagram publishing requires a Facebook Page as its backbone. Read the prerequisites carefully — most 'it didn't work' cases trace back here.

Prerequisites (do these inside Meta first)

- You have a Facebook account with your real name (personal profiles only, no fake accounts).
- You administer at least one Facebook Page. If not: facebook.com → Menu → Pages → Create new Page.
- Your Instagram account is set to Business or Creator. Instagram app → Settings and privacy → Account type and tools → Switch to professional account.
- That Instagram account is linked to your Facebook Page. Facebook Page → Settings → Linked accounts → Instagram → Connect account.
- You are the Page admin (not just Editor). Check at Page → Settings → Page roles.

The connection flow

1 In SocialMind, open Social Accounts

Left sidebar → Social Accounts → tile 'Instagram + Facebook' → click Connect.

2 Log in to Facebook

A Facebook popup opens. Log in with the account that administers the Page you want to post from. If you are already logged into Facebook in that browser you will see your name and a Continue button instead.

3 Choose Business Portfolio (if prompted)

If your Facebook account owns multiple businesses, Meta asks which one SocialMind can access. Pick the one that owns the Page and Instagram you want to post from.

4 Pick the Pages

Meta shows a list titled 'Which Pages do you want to use with SocialMind?'. Tick the Pages you want to publish to. You can select more than one.

5 Pick the Instagram accounts

Below the Pages, Meta lists the Instagram accounts attached to those Pages. Tick the ones you want to publish to.

6 Review permissions

Meta shows every permission SocialMind is requesting. Leave them all enabled — switching any off will cause publishing to fail. The full list is below.

7 Click Save

You are redirected back to SocialMind with the Instagram and Facebook accounts now showing status 'Connected' and a green dot.

Permissions SocialMind requests from Meta

Permission / scope	Why we ask for it
pages_show_list	Show you the Pages you administer so you can pick which to connect.
pages_read_engagement	Read likes / comments / reach counts to populate Analytics.
pages_manage_posts	Publish, edit and delete posts on the Pages you selected.
pages_manage_metadata	Register the webhook that notifies us when a scheduled post is delivered.
instagram_basic	Read your IG profile and media objects.
instagram_content_publish	Publish feed photos, carousels and reels on the IG accounts you selected.

Permission / scope	Why we ask for it
instagram_manage_insights	Read Insights (reach, impressions, saves) to populate Analytics.
business_management	Confirm that your Facebook account administers the selected Business Portfolio.

Common gotchas on Meta

'No Instagram accounts found' — IG is still Personal, not Business/Creator, or not linked to a Page.

'You don't have permission' — you are an Editor on the Page but not an Admin. Only Admins can authorize publishing apps.

Cannot post Reels — Reels require the video to be MP4, 9:16 aspect ratio, under 90 seconds and smaller than 100 MB.

Instagram publishing cap — Meta allows 25 published posts per IG account per 24 hours. SocialMind queues anything beyond that until the window reopens.

Changing the Pages or Instagram accounts later

Facebook → Settings → Business integrations → SocialMind → Edit. Add or remove Pages / IG accounts there and SocialMind will reflect the change on next sync.

STEP 6

7. Connect LinkedIn

LinkedIn supports posting to **your personal profile** and to any **Company Page** you administer. SocialMind handles both; which one is used is decided per post in the composer.

Prerequisites

- A LinkedIn account you can sign into (same account used in a browser works best).
- For Company Page posting: you must be Super Admin or Content Admin on that page. Check at linkedin.com/company/your-company/admin/ → Admin tools → Manage admins.
- The Company Page must be published (not in draft).

The connection flow

1 Open Social Accounts in SocialMind

Click 'Connect LinkedIn' on the LinkedIn tile.

2 Sign into LinkedIn

LinkedIn's OAuth screen opens. Complete 2FA if prompted.

3 Click 'Allow' on the authorization screen

LinkedIn lists the exact scopes SocialMind is requesting. You must leave them all enabled.

4 Pick which Company Pages

SocialMind reads the list of pages you administer and shows them in a dropdown. Tick each page you want to publish to.

5 Done

You are back in SocialMind with LinkedIn now showing status 'Connected' and one entry per connected target (personal profile + each page).

LinkedIn scopes requested

Permission / scope	Why we ask for it
openid, profile, email	Read your name, headline and email so SocialMind knows which LinkedIn user has connected.
w_member_social	Publish posts to your personal profile.
r_organization_social	Read posts and engagement on the Company Pages you administer, for Analytics.
w_organization_social	Publish posts to those Company Pages on your behalf.

Permission / scope	Why we ask for it
rw_organization_admin	Fetch the list of Company Pages you administer so SocialMind can show them in the picker.

LinkedIn limits

LinkedIn caps posting at **~150 API-published posts per user per day**, and rejects posts longer than **3,000 characters**, images over **5 MB**, or videos over **5 GB / 10 minutes**. SocialMind flags any draft that exceeds these before you submit for approval.

STEP 7

8. Connect X (Twitter)

X publishing uses OAuth 2.0 with a Confidential Client — SocialMind holds the developer app, so you do **not** need to apply to X's developer portal or pay for API access yourself. You only need to log in and authorize.

Prerequisites

- An X account you can sign into right now.
- Access to the account's email or phone for 2FA codes.
- If the X account was created in the last 24 hours, wait — X will reject OAuth from very new accounts.

The connection flow

1 Open Social Accounts in SocialMind

Click 'Connect X' on the X tile.

2 Sign into X

X's authorization page opens. Enter username and password, complete 2FA if prompted.

3 Review and click 'Authorize app'

X displays the scopes SocialMind is requesting. The username that is about to be connected is shown at the top — double-check it before clicking Authorize.

4 You are returned to SocialMind

The X account is listed under Social Accounts with status 'Connected' and your @handle visible.

X scopes requested

Permission / scope	Why we ask for it
tweet.read	Read your own posts for Analytics (impressions, likes, replies).
tweet.write	Publish posts and threads on your behalf when a scheduled time arrives.

Permission / scope	Why we ask for it
users.read	Read your handle and profile so SocialMind can show which account is connected.
offline.access	Receive a refresh token so SocialMind keeps publishing without asking you to log in every two hours.

X limits

X restricts publishing to **500 posts per 24 hours** per connected account and **280 characters per post** (longer posts require X Premium, which allows up to 25,000 characters). Threads are supported — compose them in SocialMind as a sequence; each tweet in the thread counts separately against the daily limit.

Re-authorizing

If a connected X account suddenly stops publishing it usually means the refresh token expired because you changed your X password or revoked the app at [x.com](#) → Settings → Security → Apps and sessions. Open Social Accounts in SocialMind and click **Reconnect** on the affected row.

STEP 8

9. Upload media

The Media Library is where images and videos live before you attach them to a post. Everything you upload is private to your workspace and never served publicly except as part of a published social post.

Field	What to enter	Required
Images	JPEG, PNG, WEBP. Max 25 MB each. Minimum 320x320 px for Instagram.	Optional
Videos	MP4 (H.264 + AAC). Max 100 MB each; 90 s for Reels, 10 min for feed.	Optional
Alt text	Required by Instagram and strongly recommended for accessibility.	Optional
Tags	Freeform labels to help your team find assets later ('product-shot', 'q1-campaign').	Optional

STEP 9

10. Create your first post

1 Open the Composer

Sidebar → Composer → New post.

2 Pick the networks

Tick Instagram, Facebook, LinkedIn or X — any combination. The composer shows a live preview per network as you type.

3 Write the caption once

SocialMind splits a single caption into per-network variants automatically. You can override any variant inline.

4 Use AI Suggest

Click 'Suggest' to generate caption + hashtags tailored to each network, informed by what has performed well in your workspace.

5 Attach media

Pick from Media Library or drop in new files.

6 Schedule or submit

If you have publishing rights, pick a time on the calendar and click Schedule. Otherwise click 'Submit for approval'.

STEP 10

11. Approval workflow

Posts move through states: **Draft** → **In review** → **Approved** → **Scheduled** → **Published**. Who can move a post between which states is configured per workspace in **Settings** → **Approval policy**.

- Editors can create drafts and submit them for review.
- Approvers see pending posts under Approvals; they can approve, request changes with a comment, or reject.
- Only Admins (or whoever your policy names) can mark a post as 'Ready to publish'.
- Every state change is written to the audit log with the user, time, and comment.

Review by someone outside your workspace

For client sign-off, use **Review Links**. Open a post → Share → Create review link. A public, read-only URL is minted; your client approves or comments without creating a SocialMind account. Links can be set to expire or revoked at any time.

STEP 11

12. Schedule & calendar

The Calendar shows every scheduled, published, failed and draft-in-review post on a month / week / day grid. Drag a post to reschedule. Click a slot to compose directly into that time.

- Scheduling uses your workspace timezone (set during signup).
- Each scheduled post retries up to 3 times on provider errors before it is marked Failed and notified to Admins.
- The 'Best time to post' badge on each day uses your own analytics; it needs ~2 weeks of history to appear.
- You can set a 'quiet hours' window in Settings so nothing publishes overnight.

STEP 12

13. Analytics & insights

Analytics pulls reach, impressions, engagement and follower delta from each connected provider. The **Learning Loop** turns that history into concrete recommendations — which day/time performs best per network, which hashtags lift reach, and which post lengths engage most.

Data freshness

Instagram and Facebook data refreshes every 15 minutes. LinkedIn refreshes every hour (API limit). X refreshes every 5 minutes. All numbers shown in Analytics carry a 'last synced' timestamp.

STEP 13

14. Security & your data

- All provider tokens (Meta, LinkedIn, X) are AES-256 encrypted at rest and never shown in the UI or exports.

- Every workspace is strictly isolated — one tenant cannot query another's data at the application or database layer.
- Admins can turn on required 2FA under Settings → Security. SSO (Google / Microsoft / Okta) is available on the Agency plan.
- You can export every record held for your workspace as JSON at any time, and deleting the workspace permanently removes it within 7 days.
- SocialMind support can only read your workspace with a written reason, read-only, for 30 minutes — and every grant is written to your own audit log.

STEP 14

15. Troubleshooting & FAQ

A connected account went red — what happened?

The provider revoked SocialMind's token. Usually caused by: password change, 2FA reset, or the user removing SocialMind from their account's connected apps list. Open Social Accounts → click Reconnect on the affected row and re-authorize.

A scheduled post is in 'Failed' state

Open the post → Activity tab. The exact provider error is logged there (e.g. 'Instagram: video aspect ratio must be 9:16'). Fix the issue and click Retry.

AI suggestions feel generic

Give the Learning Loop two weeks of data. Then under the Composer click AI Suggest → 'Use my brand voice' which pulls style from your three top-performing posts.

Can we post to multiple Instagram accounts from one workspace?

Yes. Connect as many as you administer; each shows up as its own target in the composer. The Pro plan includes 10 connected accounts, Agency is unlimited.

Does SocialMind post Stories or DMs?

Stories are supported on Instagram and Facebook. DMs are not — Meta does not permit third-party apps to send DMs on your behalf except through Messenger Business, which is a separate integration not included in SocialMind today.

What happens if we exceed our plan limits?

You keep publishing — SocialMind will not block posts. Overage is shown in Billing and charged on the next invoice at the plan's overage rate. You can set a hard cap in Settings → Billing to be refused instead of charged.

Can we cancel any time?

Yes. Settings → Billing → Cancel plan. You keep access until the end of the current billing cycle; after that the workspace moves to read-only. Data is retained for 90 days so you can re-subscribe and pick up where you left off.

STEP 15

16. Getting help

Channel	Reach	Response SLA
Email	hello@socialmind.in	1 business day (Starter), 4 hours (Pro), 1 hour (Agency)
Status page	status.socialmind.in	Live
In-app	Help menu → Ask support	Attaches workspace context automatically

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