## PLATINUM PACK

THE PLATINUM PACK IS BEST SUITED FOR SOCIAL MEDIA AND DIGITAL AGENCIES

# ROLES FUNCTIONALITY SET UP

This document serves a guide to the different roles in the platinum Pack and the functionality available to each user.

#### ROLES















CLOUDS (3) CIAL

## PLATINUM PACK

SUPER ADMIN

#### **FUNCTIONALITY**

DASHBOARD

OMNIBOX

PUBLISH

LISTEN

ANALYTIC

ACCOUNT

SUPPORT





#### DASHBOARD

#### SUPER ADMIN



This is the default landing page in CloudSocial after you login.



Do note that by default you will always see the latest posts and latest five mentions.



You can add social channels & users from shortcut button.





#### OMNIBOX



Can directly respond to the mention in Omnibox.



Assign or Approve workflow:

- Approve mention assigned to Super Admin
- Comment on mention assigned to Super Admin



Assign FYI workflow or an email a specific mention to following roles:

- Agent
- Back Office
- Brand Manager
- Analytic
- Marketing
- Agency Manager
- Can set the status of the 3 mention
- Can tag the mention basis 3 customizable tags







#### OMNIBOX

- Can set the sentiment of that mention
- Can see chat history
- Can see related post
- Can see post traction
- Can see the following details regarding the particular mention in Omnibox
  - Date & time
  - **?** Unique mention ID
  - Social profile name of the sender
  - Status in life cycle with color coding
  - Set priority

CLOUDS (3) CIAL







Create



Publish





Publish Now Publish Later



Recurrence



Recurrence can be set on

- Daily Basis
- Weekly Basis (on the selected date of the week)
- Monthly Basis (on the selected date of the Month)
- Yearly Basis (on the selected date of the year)
- At fixed time



Pause

- When recurrence is on
- Approved post when recurrence is on



Resume









#### Delete

- Can delete post sent for approval
- Can delete post which he/she has rejected
- Can delete post which are waiting for approval
- Can delete failed post
- Can delete paused post
- Can delete resumed post
- Can delete save as draft post
- Can delete sent post when recurrence is true
- Can take no action on deleted posts



#### Save as Draft

- Post which he/she has created can be saved as drafts
- Can save as draft posts which have failed









Reject





Recall

- Only the immediate one is recalled when recurrence is true, but future will continue
- Only the immediate one is recalled when no recurrence is set



Approve

- Sent for approval posts
- Waiting for approval
- Rejected posts
- Failed posts
- Crello & Pixabay
- Post Post
  - Can Post
    - Select from available social media profiles







- Can send post through email to following roles
  - Agent

- Analytic
- Back Office
- Marketing
- BrandManager
- AgencyManager



Calendar - Unified view of the scheduled posts by day/ week/ month



FB Ad Manager



Instagram Ad Manager





## LISTEN











#### ANALYTICS

- Downloading the customizable reports for the various Social media channels
- Access to the Analytics section organized by:
  - Prand (Aggregate across all Social media channels)
  - Facebook Instagram
  - Twitter Youtube
  - Pinterest Linkedin
  - Email GMB
  - Tiktok Team
  - Sentiment Google Analytic





### ANALYTICS









#### **ACCOUNT**

- Create User Can create users and assign them to roles
- Create Brands- Can create brands. Also assign the users to brands
- Users List List of all users created on the platform
- Plan info Can see plan information, validity of pack and mentions available







### SUPPORT



Access our Support 24x7x365

- **Email**
- Chat
- Live Calls
- Raising Tickets to support team





## #OF USER



Platinum - One

## PLATINUM PACK



#### **FUNCTIONALITY**











#### DASHBOARD

#### AGENT



This is the default landing page in CloudSocial after you login.



Do note that by default you will always see the latest posts and latest five mentions.





#### OMNIBOX



Can directly respond to the mention in Omnibox.



Assign or Approve workflow:

- 💡 Can assign a mention to all roles
- Can comment back to the sender on a specific mention



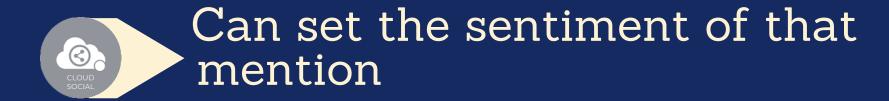
Assign FYI workflow or an email a specific mention to following roles:

- Super Admin 💡 Analytic
- Back Office
- Marketing
- Brand Manager
- Agency Manager
- Can set the status of the mention
- Can tag the mention basis customizable tags





### OMNIBOX



- Can see chat history
- Can see related post
- Can see post traction
- Can see the following details regarding the particular mention in Omnibox
  - Pate & time
  - Unique mention ID
  - Social profile name of the sender
  - Status in life cycle with color coding
  - Set priority

CLOUDS (3) CIAL





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#### #OF USER



#### Platinum - Twenty

- A specific agent can be mapped to one brand or a specific social media channel
- Multiple agents can be mapped to the same brand or profile

## PLATINUM PACK



#### **FUNCTIONALITY**

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DASHBOARD	1
	/



ANALYTIC		
ANALYTIC		<b>\</b>
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V .		









#### DASHBOARD

#### BACK OFFICE



This is the default landing page in CloudSocial after you login.



Do note that by default you will always see the latest posts and latest five mentions.





## LISTEN









#### ANALYTICS

- Downloading the customizable reports for the various Social media channels
- Access to the Analytics section organized by:
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  - Pinterest Linkedin
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  - Tiktok Team
  - Sentiment Google Analytic





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### #OF USER



Platinum - One

## PLATINUM PACK

## MARKETING USER

#### **FUNCTIONALITY**



PUBLISH

LISTEN



ACCOUNT







#### DASHBOARD

#### MARKETING



This is the default landing page in CloudSocial after you login.



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Create



Publish





Publish Now Publish Later



Recurrence



Recurrence can be set on

- Daily Basis
- Weekly Basis (on the selected date of the week)
- Monthly Basis (on the selected date of the Month)
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Pause

- When recurrence is on
- Approved post when recurrence is on



Resume









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#### Save as Draft

- Post which he/she has created can be saved as drafts
- Can save as draft posts which have failed









Reject





Recall

- Only the immediate one is recalled when recurrence is true, but future will continue
- Only the immediate one is recalled when no recurrence is set



Approve

- Sent for approval posts
- Waiting for approval
- Rejected posts
- Failed posts
- Crello & Pixabay



Post

- Can Post
  - Select from available social media profiles





- Can send post through email to following roles
  - Super Admin Analytic
  - Back Office
    Agent
  - BrandAgencyManagerManager
- Calendar Unified view of the scheduled posts by day/ week/ month
- FB Ad Manager
- Instagram Ad Manager





## LISTEN

Can set your keyword for listening here







## ANALYTICS

- Downloading the customizable reports for the various Social media channels
- Access to the Analytics section organized by:
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  - Facebook Instagram
  - Twitter Youtube
  - Pinterest Linkedin
  - Email GMB
- Tiktok Team
- Sentiment Google Analytic





# **ANALYTICS**





CLOUDS (3) CIAL





#### ACCOUNT



Create Brands- Can create brands. Also assign the users to brands.





#### SUPPORT



Access our Support 24x7x365

- **Email**
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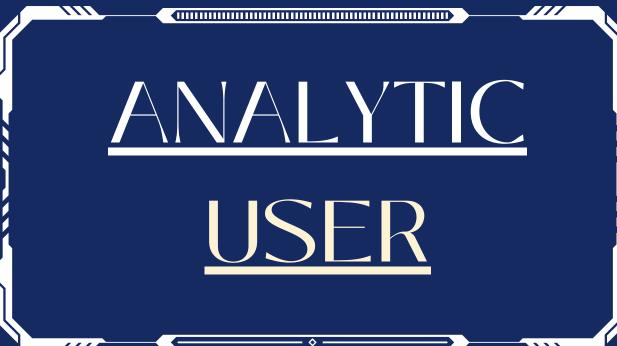
# #OF USER



#### Platinum - Seven

- A specific marketing role can be mapped to one brand or a specific social media channel.
- One marketing role can be mapped to multiple brands.

# PLATINUM PACK



#### **FUNCTIONALITY**





SUPPORT

CLOUDS (B) CIAL





#### DASHBOARD

#### ANALYTIC



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## ANALYTICS

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  - Sentiment Google Analytic





# **ANALYTICS**









#### SUPPORT



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# #OF USER



#### Platinum - Seven

- A specific analytic role can be mapped to one brand or a specific social media channel.
- One analytic role can be mapped to multiple brands.

# PLATINUM PACK



#### **FUNCTIONALITY**





ANALYTIC



SUPPORT





#### DASHBOARD

#### BRAND MANAGER



This is the default landing page in CloudSocial after you login.



Do note that by default you will always see the latest posts and latest five mentions.





#### OMNIBOX



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- Back Office
- Marketing
- Agent
- Agency Manager
- Can set the status of the mention
- Can tag the mention basis customizable tags







# OMNIBOX











- Pate & time
- Unique mention ID
- Social profile name of the sender
- Status in life cycle with color coding
- Set priority





## ANALYTICS

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# **ANALYTICS**





CLOUDS (3) CIAL





# ACCOUNT



Plan info - Can see plan information, validity of pack and mentions available

CLOUDS (3) CIAL





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#### #OF USER



#### Platinum - Seven

- A specific brand manager role can be mapped to one brand or a specific social media channel.
- In Platinum Pack, seven brand managers can be mapped to seven different brands

# PLATINUM PACK



#### **FUNCTIONALITY**





PUBLISH



SUPPORT





#### DASHBOARD

#### AGENCY MANAGER



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- Super Admin 💡 Analytic
- Back Office
- Marketing
- Brand Manager
- Agent

Can set the status of the mention

3

Can tag the mention basis customizable tags







# OMNIBOX











- Pate & time
- Unique mention ID
- Social profile name of the sender
- Status in life cycle with color coding
- Set priority

CLOUDS (CIAL







Create



Publish



Publish Later



Recurrence



- Daily Basis
- Weekly Basis (on the selected date of the week)
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- Crello & Pixabay



- Can Post
  - Select from available social media profiles



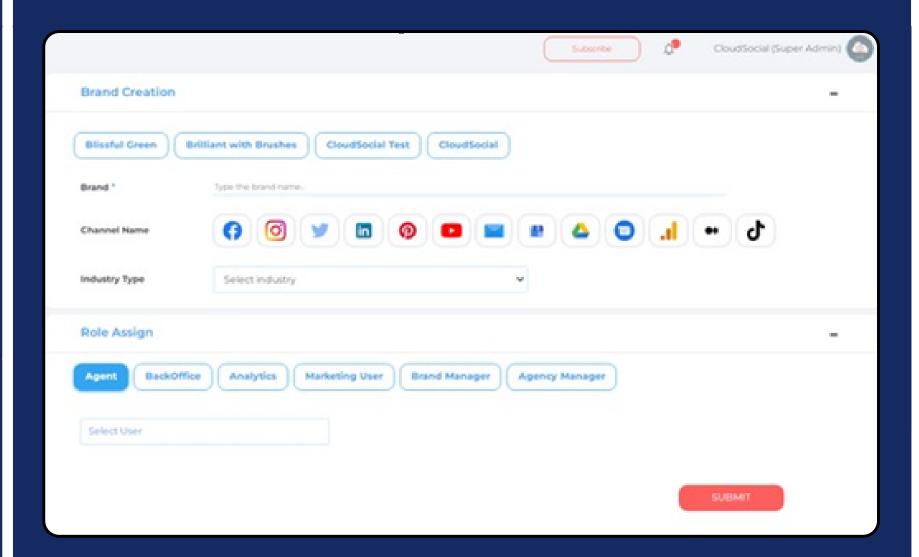




- Can send post through email to following roles
  - Super Admin Analytic
  - Back Office
    Agent
  - BrandMarketingManagerManager
- FB Ad Manager
- Instagram Ad Manager



#### ROLE ASSIGN





Steps to Assign a Role in Brand

Once you created a user from the create user section. You have to go ahead towards the Brand Creation Page.

- Go to the Account
- Select the Brand on which you want to assign the user.
- Click the Role Assign option at the bottom and select the role you want to assign

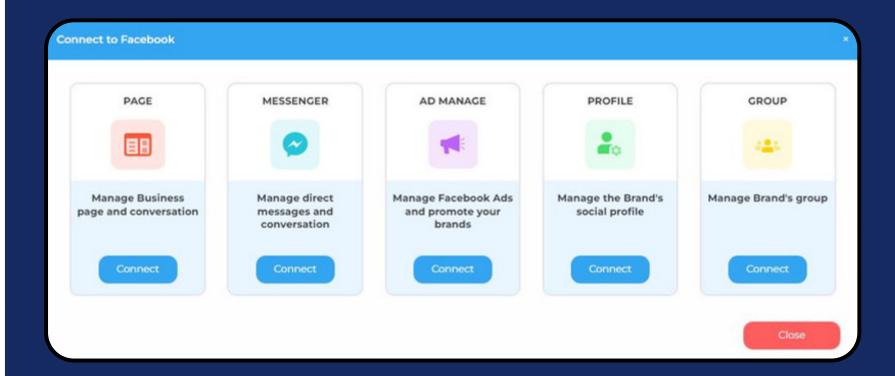




Select the particular user from the drop-down menu and click on the submit button.

# ADD SOCIAL MEDIA CHANNELS

Facebook



Log in to Facebook

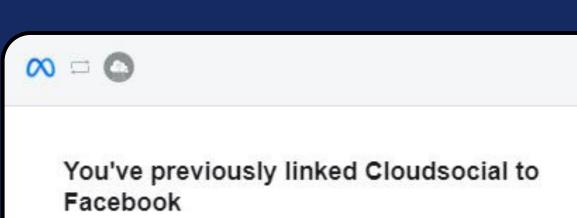
Email address or phone number

Password

Log In

Forgotten account? Sign up for Facebook
Not now





Would you like to continue with your previous settings?

**Edit settings** 

Continue as Sati Neha

Not Sati Neha? Log in to another account.

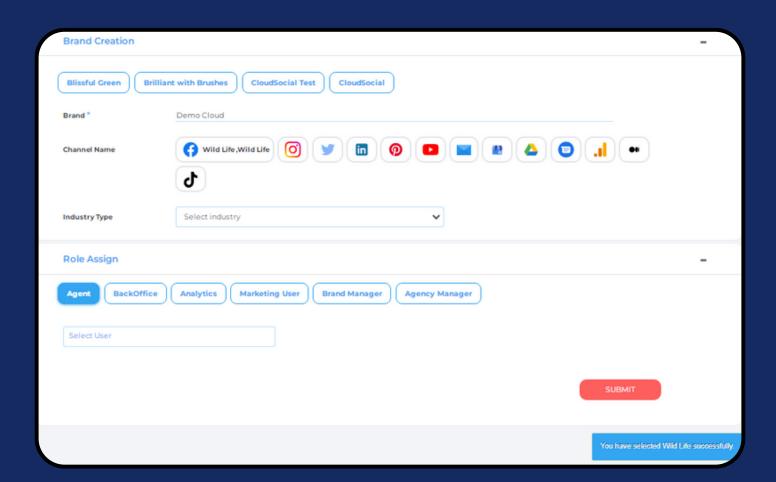
By continuing, Cloudsocial will receive ongoing access to the information that you share and Facebook will record when Cloudsocial accesses it.

Learn more about this sharing and the settings that you have.

Cloudsocial's Privacy Policy and Terms

Help Centre









#### Steps for adding Facebook

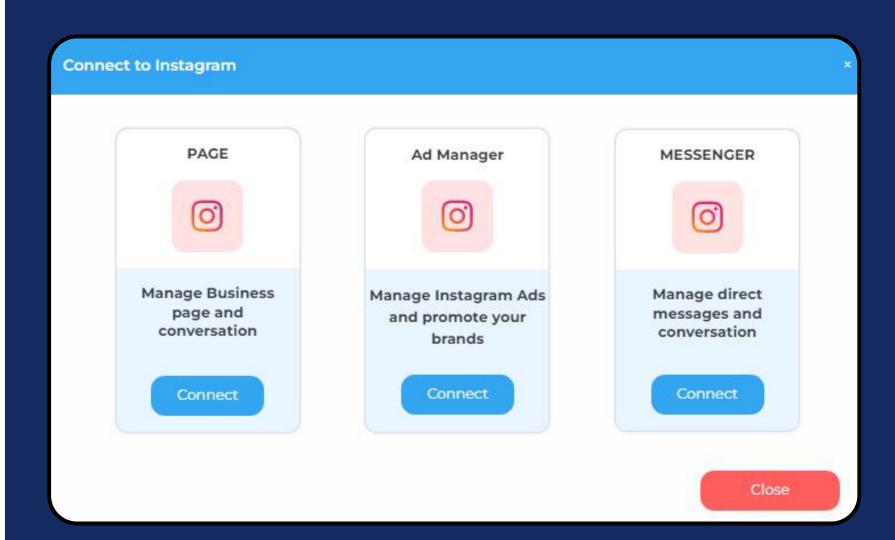
Once you click on Facebook, attached screen will open up.

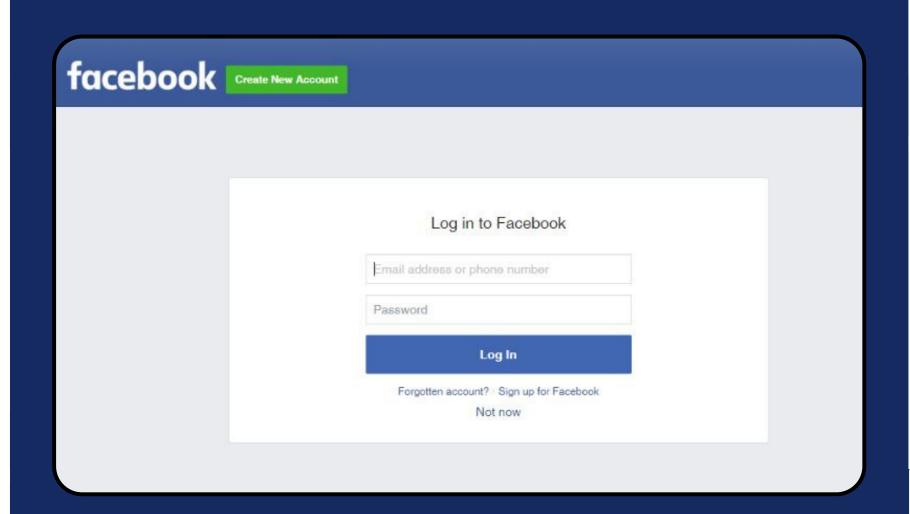
- Click on Connect after selecting the channel you wish to add.
- You will be asked to login to Facebook.
- Facebook will seek your permission to give access to CloudSocial, Accept.
- Your selected Facebook channel will get added.
- Click on the check box and Submit.

Note: The same procedure should be followed for other Facebook channels













#### You've previously linked Cloudsocial to Facebook

Would you like to continue with your previous settings?

**Edit settings** 

Continue as Sati Neha

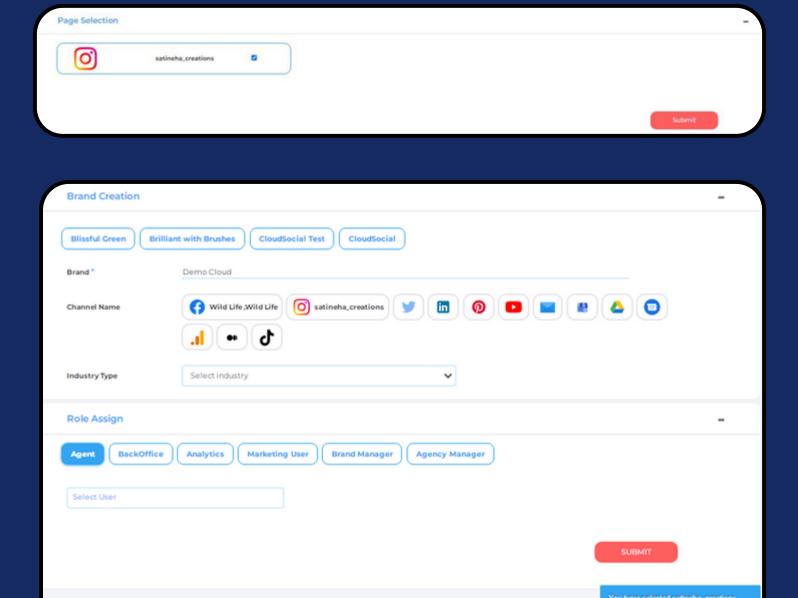
Not Sati Neha? Log in to another account.

By continuing, Cloudsocial will receive ongoing access to the information that you share and Facebook will record when Cloudsocial accesses it.

Learn more about this sharing and the settings that you have.

Cloudsocial's Privacy Policy and Terms

Help Centre







#### Steps for adding Instagram

Once you click on Instagram, this screen will open up

- Click on Connect after selecting the channel you wish to add.
- You will be asked to login to Facebook.
- Instagram will seek your permission to give access to CloudSocial, Accept
- Your Instagram Business Page will get added
- Click on the check box and Submit.

Note: The same procedure should be followed for other Instagram channels

# Twitter



#### Connect to Twitter

į.

#### PAGE



Manage Business page and conversation

Connect

#### Direct Message



Manage the brand's direct messages

Connect

Close

#### Y

Sign up for Twitter >

#### Authorise Cloudsocial Integration to access your account?

Username or email
Password

☐ Remember me · Forgotten your password?

Authorise app

#### (a).

Cloudsocial Integration

By Cloudsocial Technologies Pte Ltd cloudsocial io

It is a tool for brand management

Terms and Conditions

Privacy Policy

This application will be able to:

- See Tweets from your timeline (including protected Tweets) as well as your Lists and collections.
- See your Twitter profile information and account settings.

Cancel

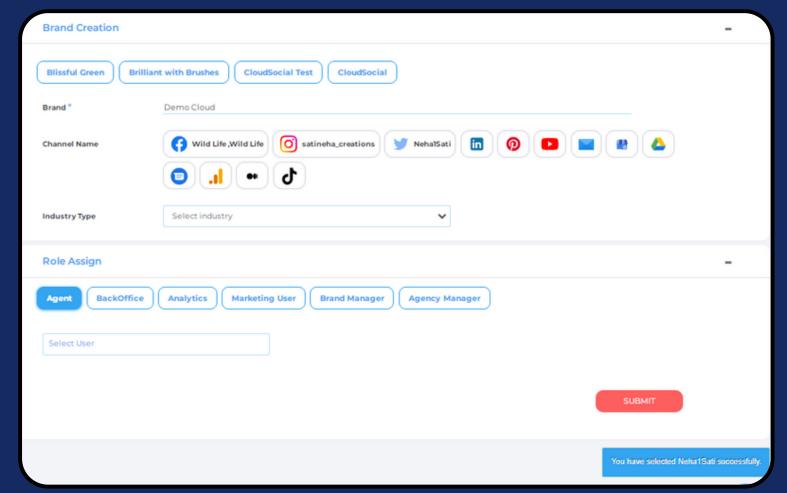
- See accounts you follow, mute, and block.
- Follow and unfollow accounts for you.

  I ledge your profile and account settle.
- Update your profile and account settings.
- Post and delete Tweets for you, and engage with Tweets posted by others (like, unlike, reply to a Tweet, Retweet, etc.) for you.
- Create, manage, and delete Lists and collections for you.
- Mute, block, and report accounts for you.
- Send Direct Messages for you and read, manage, and delete your Direct Messages.

Learn more about third-party app permissions in the Help Center.

We recommend reviewing the app's terms and privacy policy to understand how it will use data from your Twitter account. You can revoke access to any ago at any time from the Apps and sessions section of your Twitter access







Steps for adding Twitter

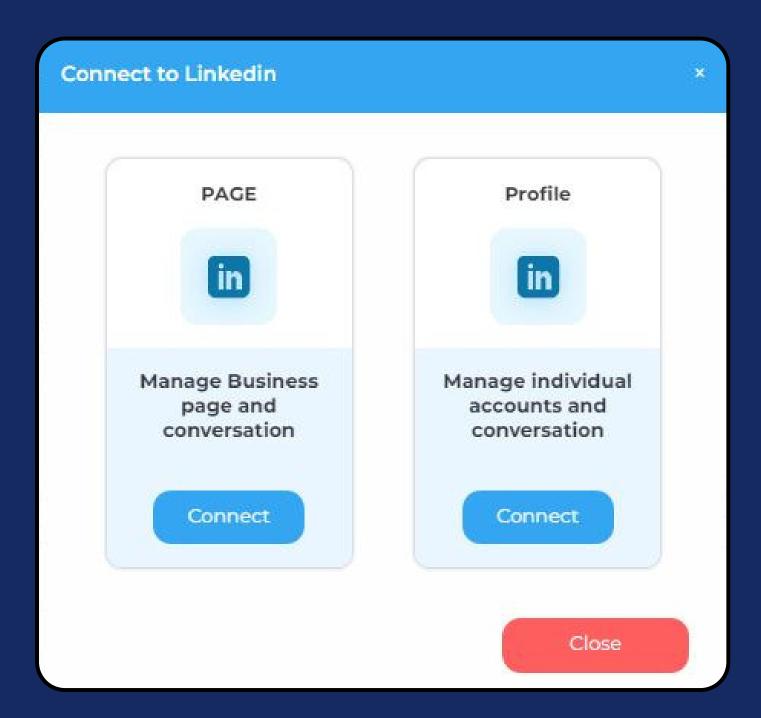
Once you click on Twitter, attached screen will open up.

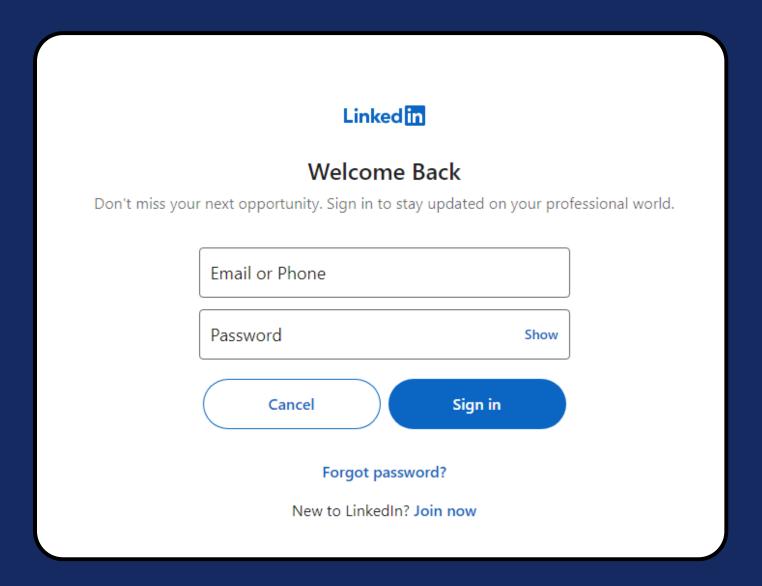
- Click on Connect after selecting the channel you wish to add.
- You will be asked to login to Twitter.
- Twitter will seek your permission to give access to CloudSocial, Accept.
- Your Twitter Profile will get added.
- Click on the check box and Submit.

Note: The same procedure should be followed for other Twitter channels

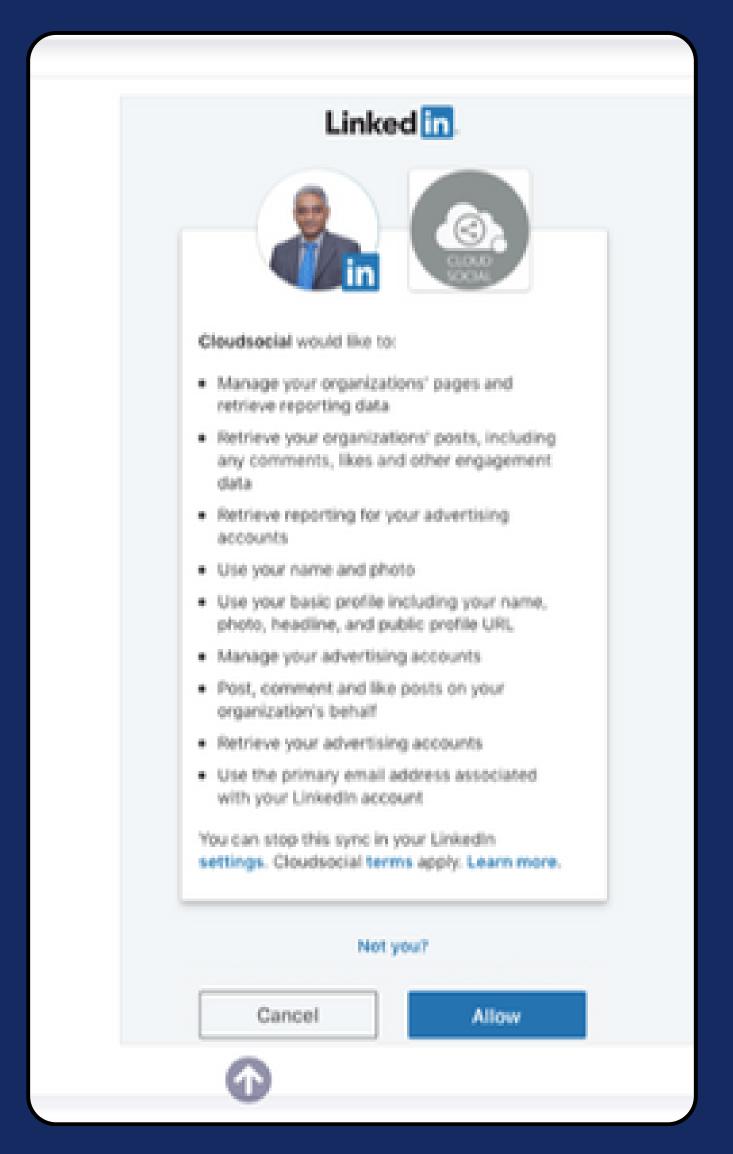
# Linkedin





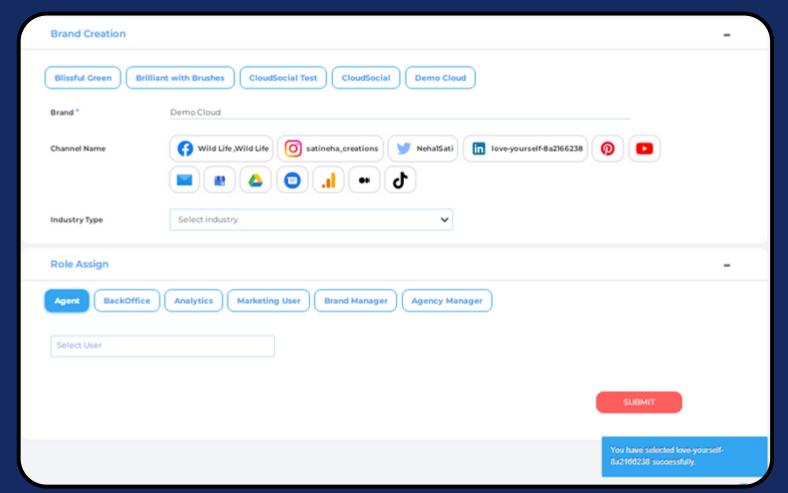












- CLOUD SOCIAL
- Steps for adding Linkedin
- Once you click on Linkedin, attached screen will open up.
- Click on Connect after selecting the channel you wish to add.
- You will be asked to login to Linkedin.
- Linkedin will seek your permission to give access to CloudSocial, Accept.
- Your Linkedin Business Page will get added.
- Click on the check box and Submit.

Note: The same procedure should be followed for other Linkedin channels



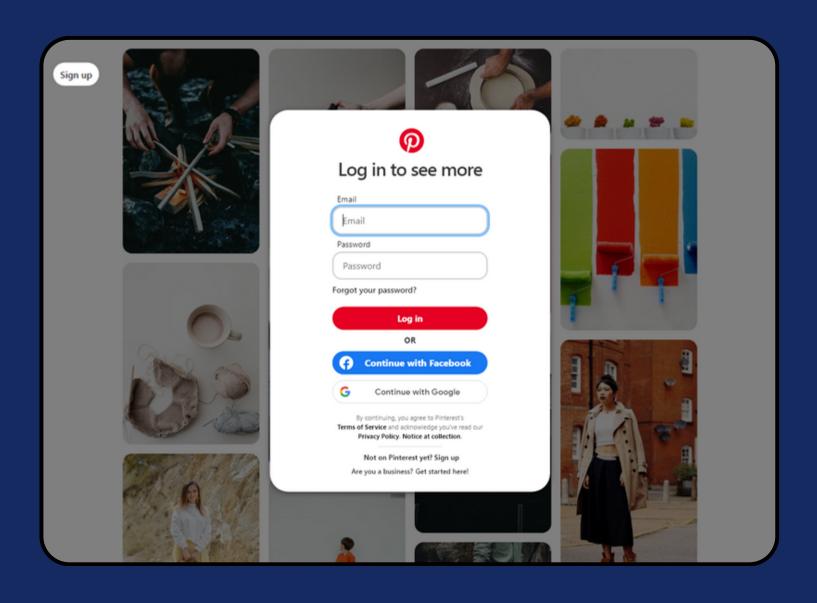


PAGE

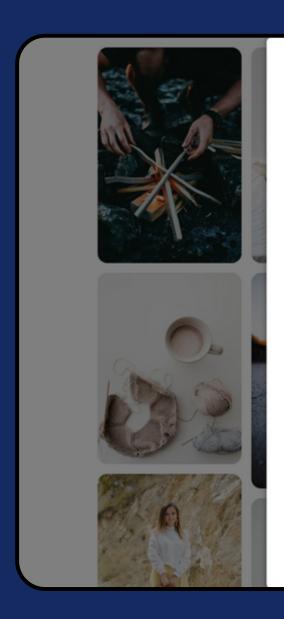
Manage Business
page and
conversation

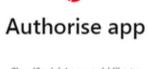
Connect

Close









CloudSocial App would like to:

See your public boards, including group boards you join

See your secret boards

Create, update or delete your public boards Create, update or delete your secret boards

> See your public Pins See your secret Pins

Create, update, or delete your public Pins Create, update, or delete your secret Pins See your user accounts and followers







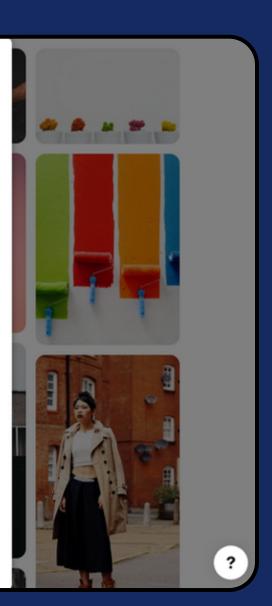
Logged in as Nehacloudpoint Not your account? Log out.

Give access

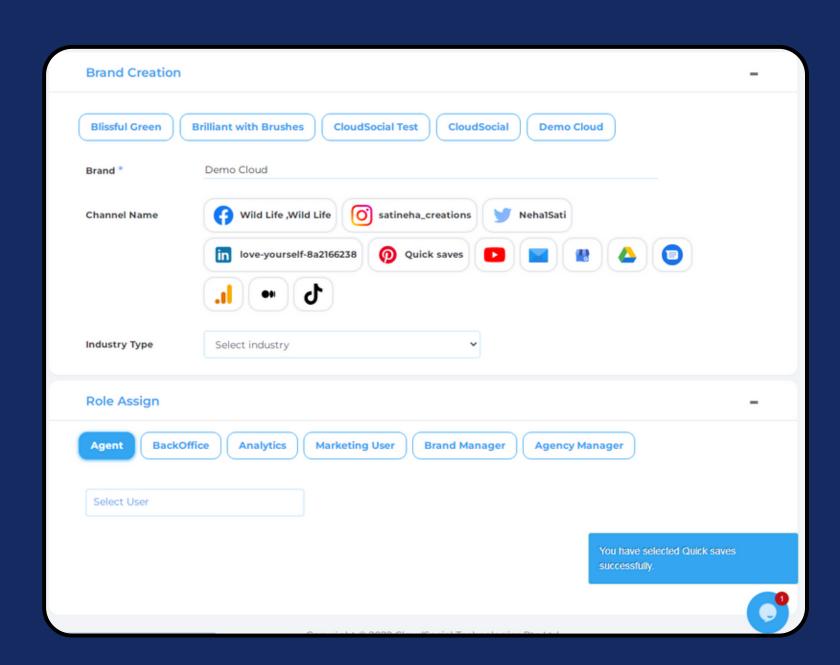
You can turn this off at any time in your settings.

We recommend reviewing the privacy policy for this app (CloudSocial App).

Access granted is covered by Pinterest's Terms of Service, Business Terms of Service and Privacy Policy.











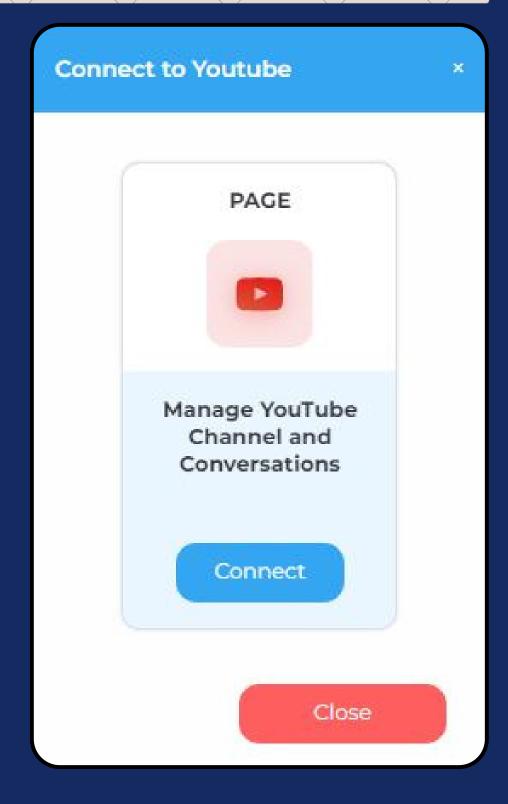
#### Steps for adding Pinterest

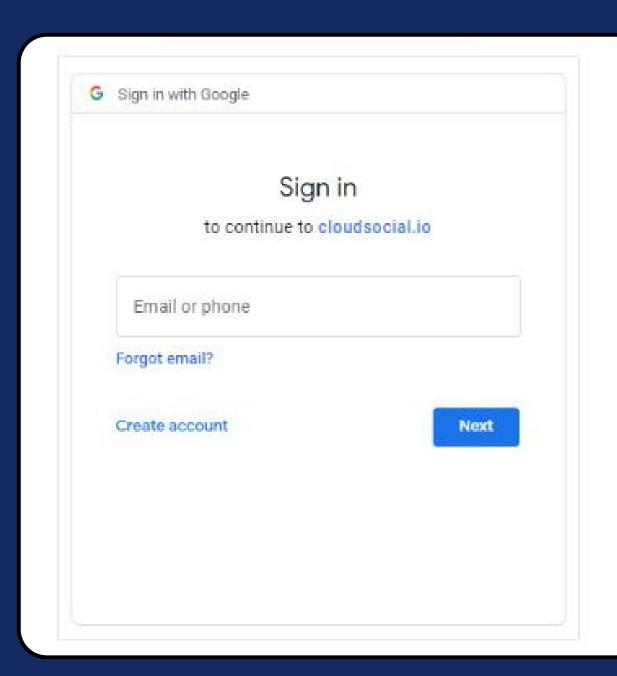
Once you click on Pinterest, this screen will open up

- Click on Connect
- You will be asked to login to Pinterest
- Pinterest will seek your permission to give access to CloudSocial, Accept.
- Your Pinterest will get added.
- Click on the check box and Submit.

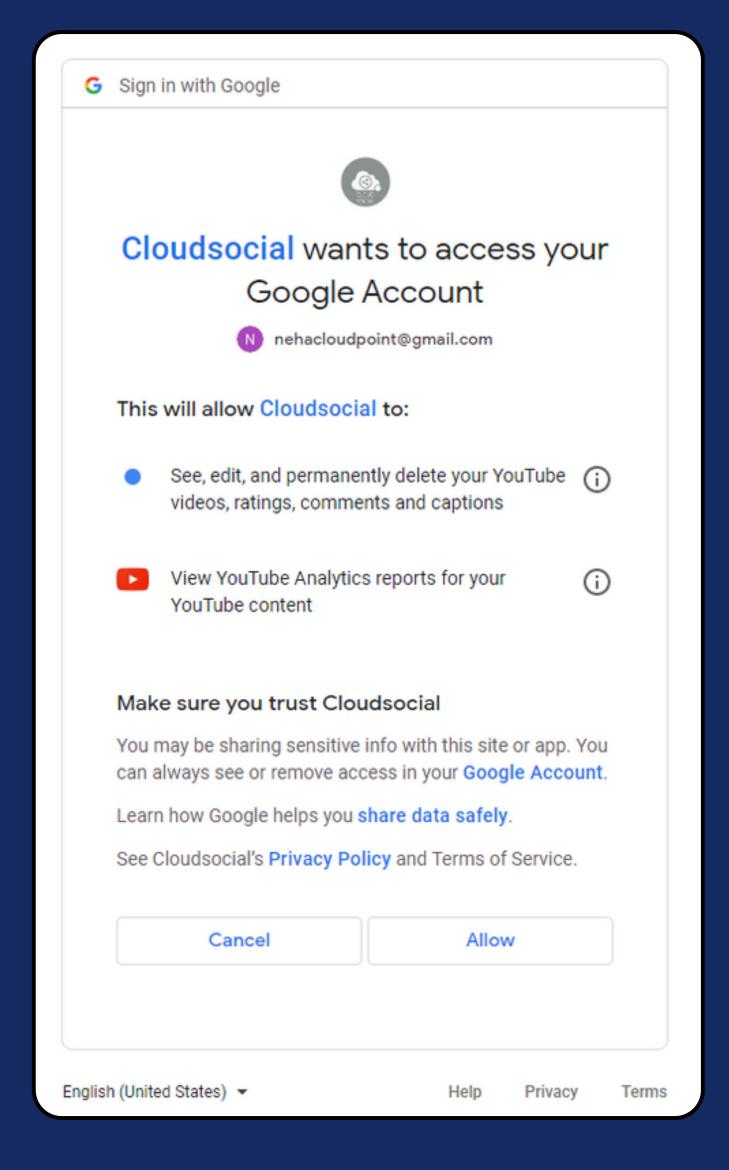


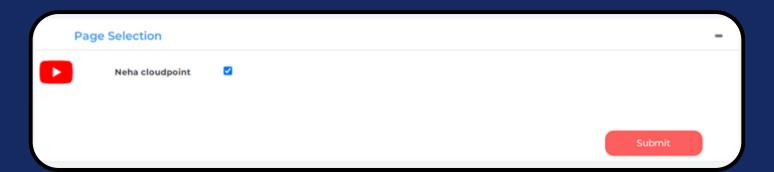
## Youtube



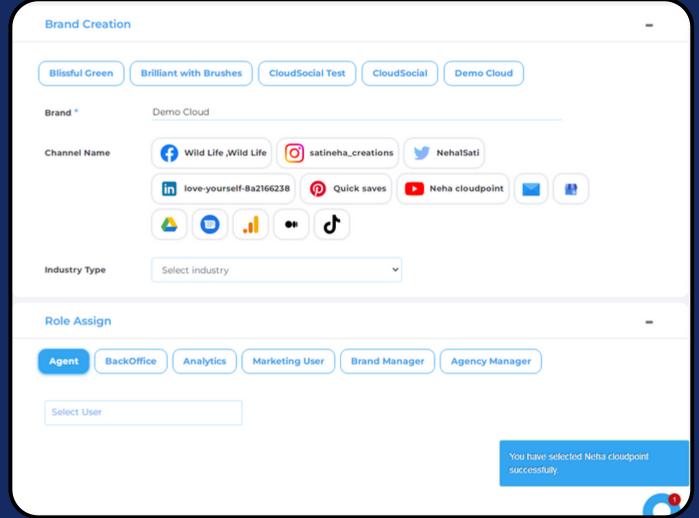










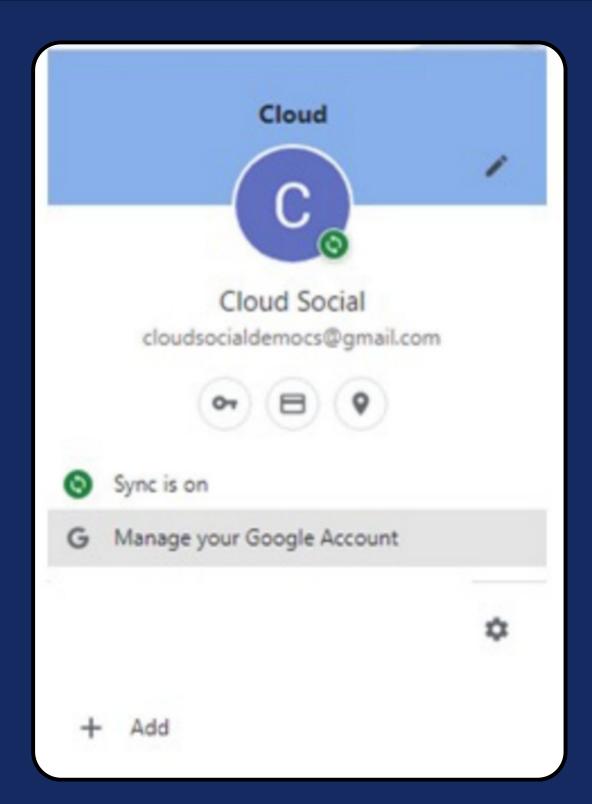


- Steps for adding Youtube
  - Once you click on Youtube, attached screen will open up.
  - Click on Connect.
  - You will be asked to login to YouTube.
  - YouTube will seek your permission to give access to Google account, Continue.
  - Your YouTube will get added.
  - Click on the check box and Submit.

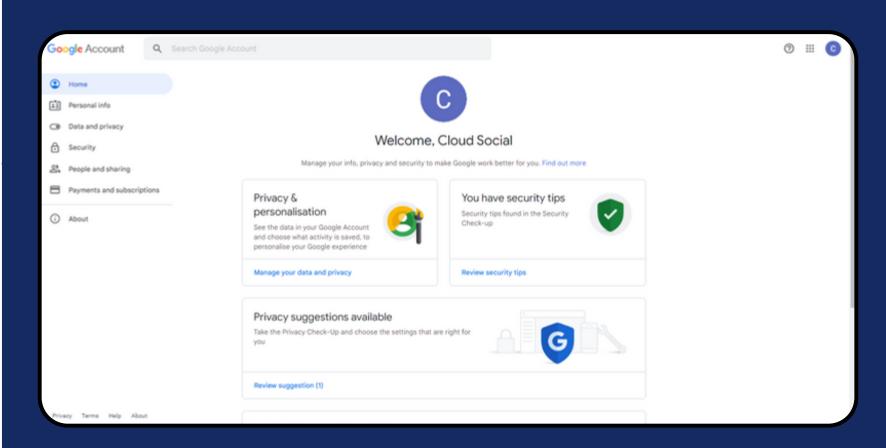


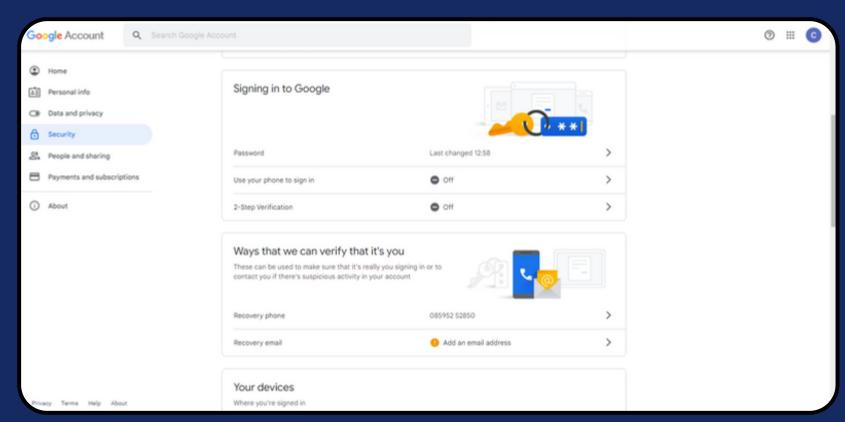


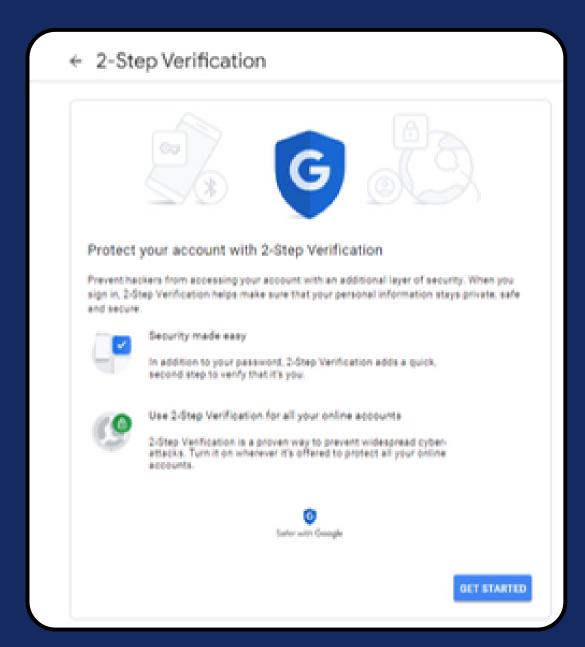
ncoming Email Settin	gs		
Mail Server *	-	Port	Use SSL/TSL
Jsername *			0
Password *			
Protocol *	O Imap O Pop3		
Outgoing Email Settin	gs		
Display Name		Port	Use SSL/TSL
6MTP Mail Server *			0
Support Email ID*			
Jsername *			
Password *			
		Close	Save





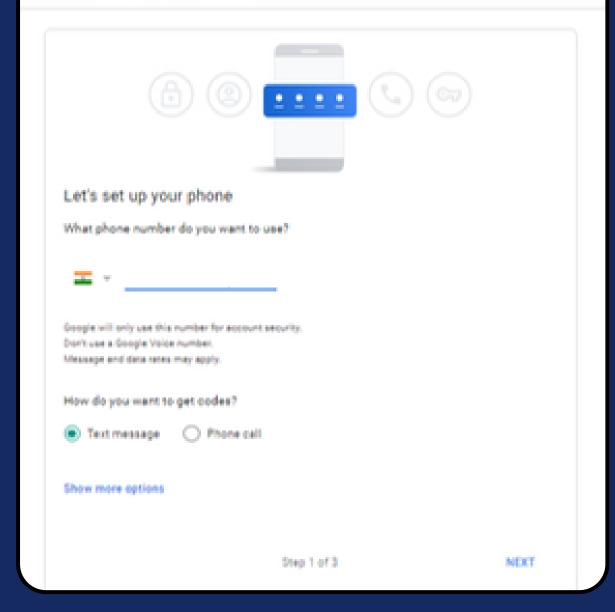




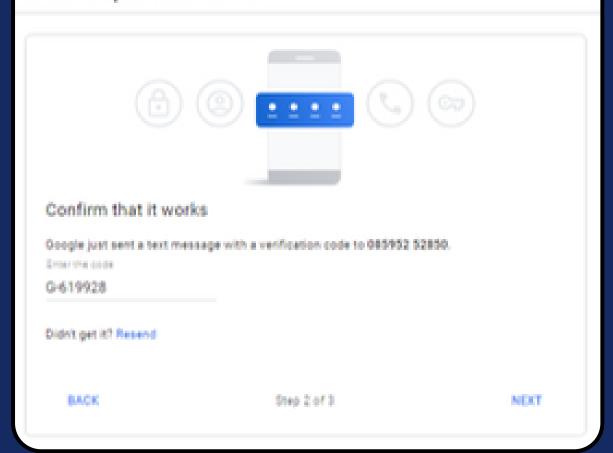




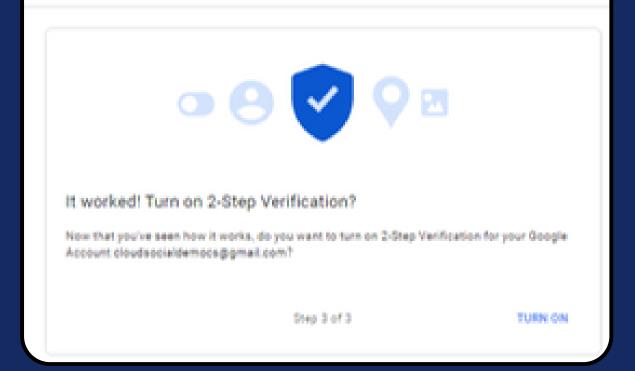
#### ← 2-Step Verification



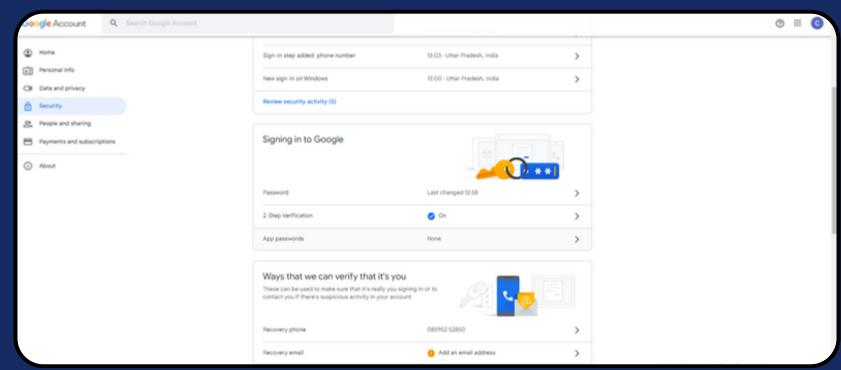
#### ← 2-Step Verification



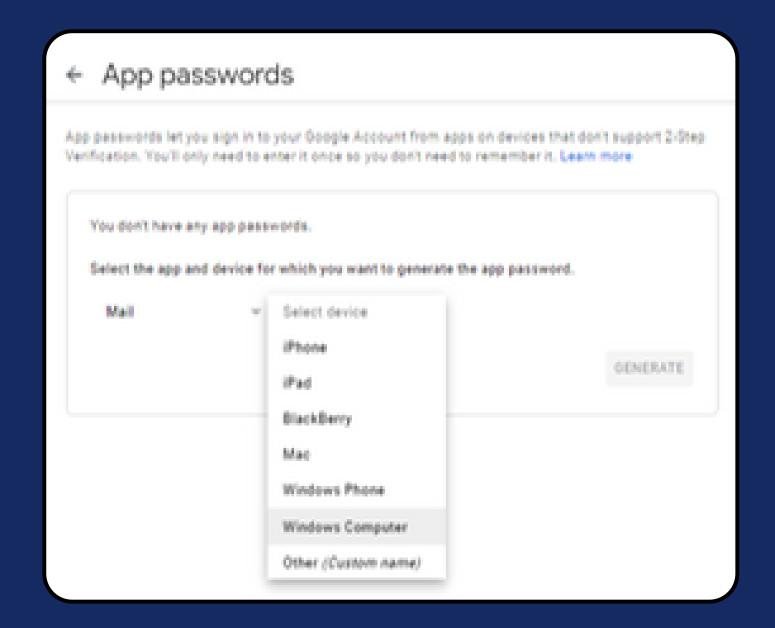
#### ← 2-Step Verification







# App passwords let you sign in to your Google Account from apps on devices that don't support 2-Step Verification. You'll only need to enter it once so you don't need to remember it. Learn more You don't have any app passwords. Select app which you want to generate the app password. Select device Calendar Contacts You'Tube Other (Custom name)





#### ← App passwords

App passwords let you sign in to your Google Account from apps on devices that don't support 2-Step. Verification. You'll only need to enter it once so you don't need to remember it. Learn more

You don't have any app passwords.

Select the app and device for which you want to generate the app password.

Mail

· Windows Computer ·

GENERATE

#### ← App passwords

App passwords let you sign in to your Google Account from apps on devices that don't support 2-Step. Verification. You'll only need to enter it once so you don't need to remember it. Learn more.



Generated app password

Your app password for Windows Computer
gkhz refu oren bifb

1. Open the 'Mail' app.

How to use it.

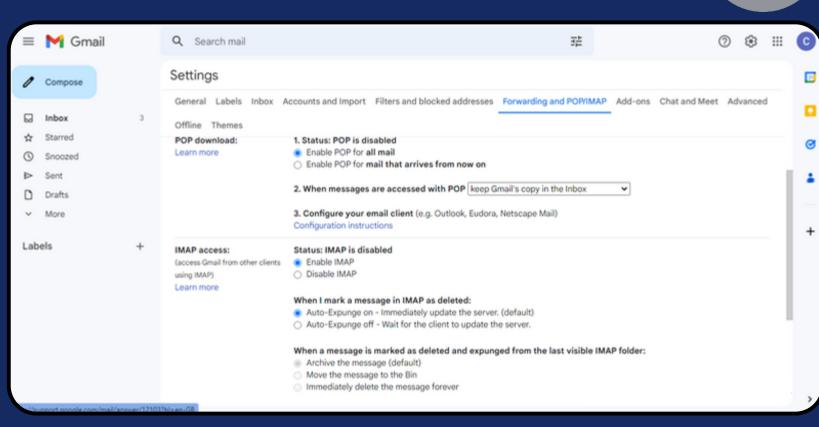
- 2. Open the "Settings" menu.
- Select 'Accounts' and then select your Google Account.
- Replace your password with the 16character password shown above.

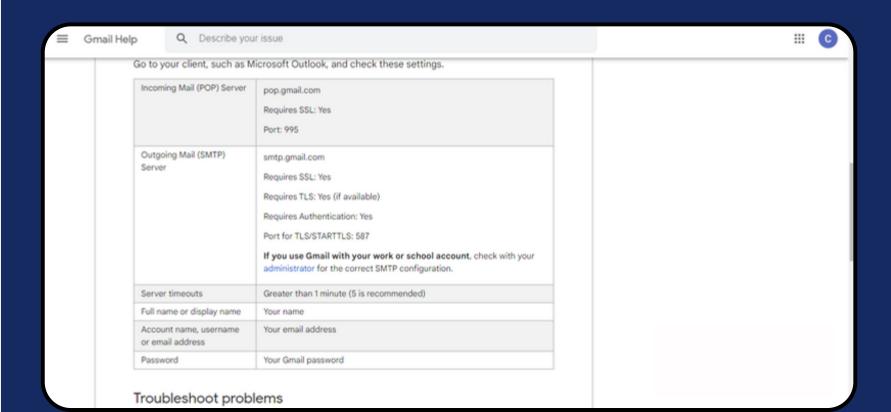
Just like your normal password, this app password grants complete access to your Google Account. You won't need to remember it, so don't write it down or share it with anyone. Learn more

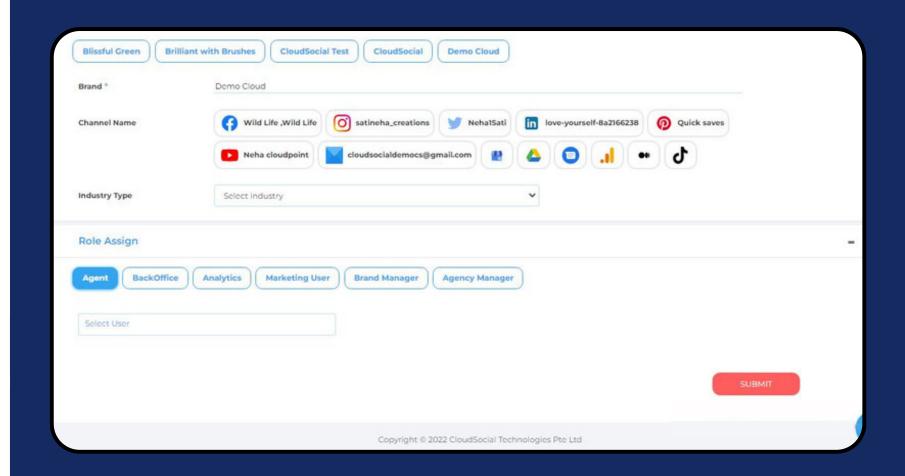
DOME

 ⊕ ☆ □ ○ : ← → C 🔒 mail.google.com/mail/u/0/?ogbl#settings/fwdandpop Q Search mail ② ⑧ Ⅲ Settings В General Labels Inbox Accounts and Import Filters and blocked addresses Forwarding and POP/IMAP Add-ons Chat and Meet Advanced □ Inbox Offline Themes ☆ Starred Forwarding: Add a forwarding address 0 Learn more Tip: You can also forward only some of your mail by creating a filter! Drafts POP download: 1. Status: POP is disabled Enable POP for all mail Learn more O Enable POP for mail that arrives from now on + Labels 2. When messages are accessed with POP  $\ensuremath{\mathsf{keep}}$  Gmail's copy in the Inbox 3. Configure your email client (e.g. Outlook, Eudora, Netscape Mail) Configuration instructions Status: IMAP is disabled IMAP access: Enable IMAP (access Gmail from other clients O Disable IMAP using IMAP) Learn more When I mark a message in IMAP as deleted: Auto-Expunge on - Immediately update the server. (default) Auto-Expunge off - Wait for the client to update the server.













#### Steps for adding Email

Once you click on Email, attached screen will open up.

In order to add Email in CloudSocial you have to complete 2 steps verification of your email.

- Go to your Email Profile

  (Which you wish to add in CloudSoical)
- Click on 'Manage Your Google Account'
- Complete the 2 Steps verification

Once you complete the 2 steps verification, you will get the option to create the App Password.

And, once you create the App Password you have to go to your Email Settings

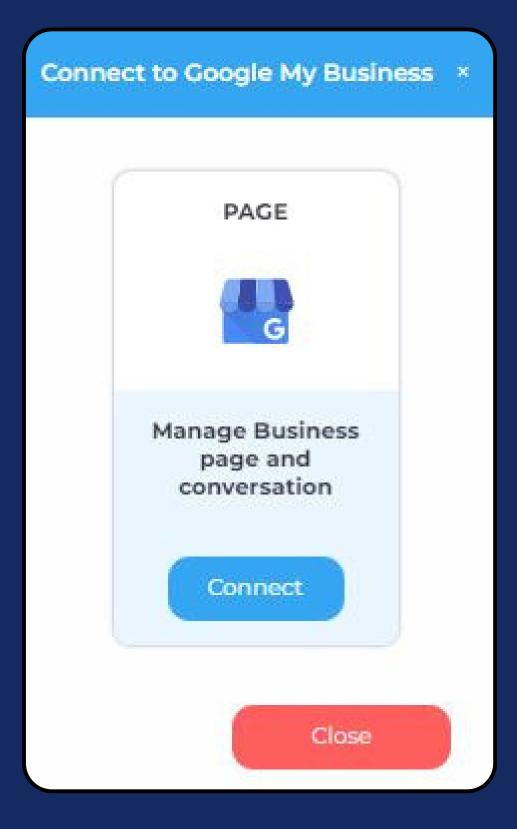
- Fill all the mandatory details for Incoming email settings
- Fill all the mandatory details for Outgoing email settings

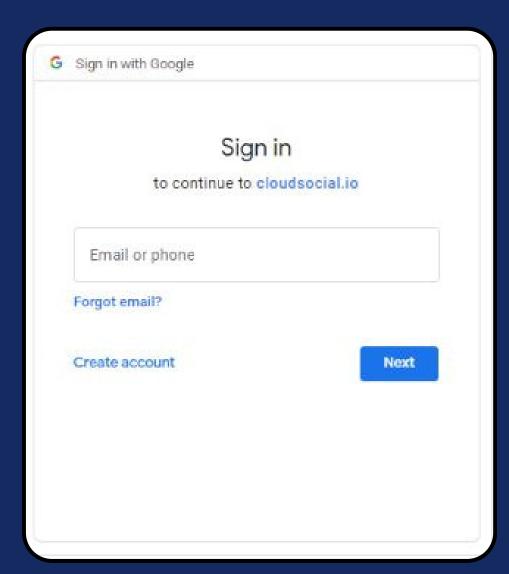


- Click on Save
- Your Email Channel will get set up

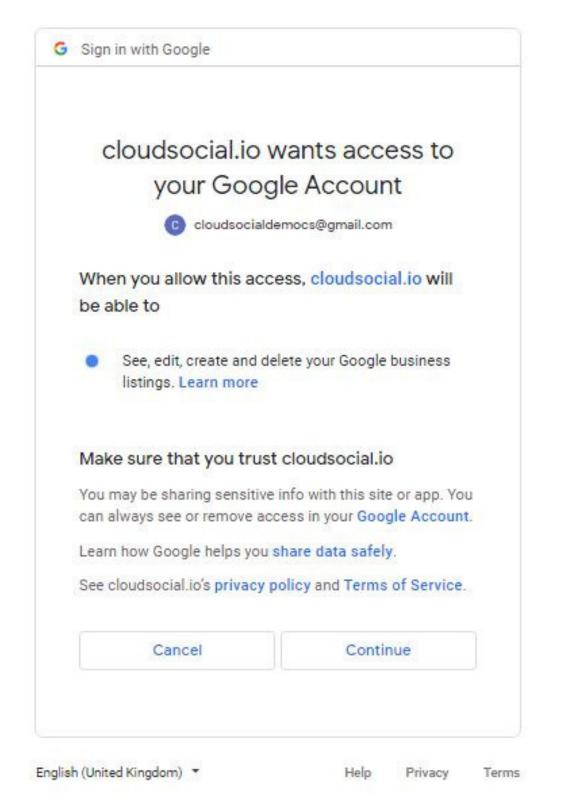


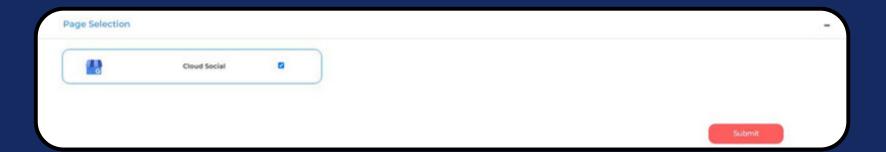


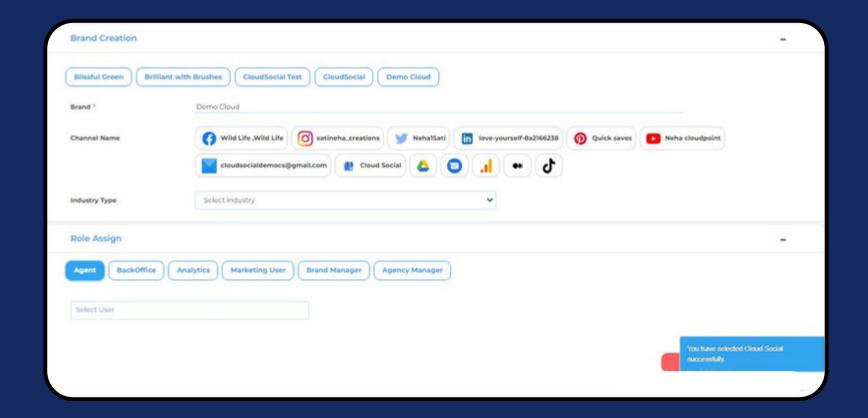
















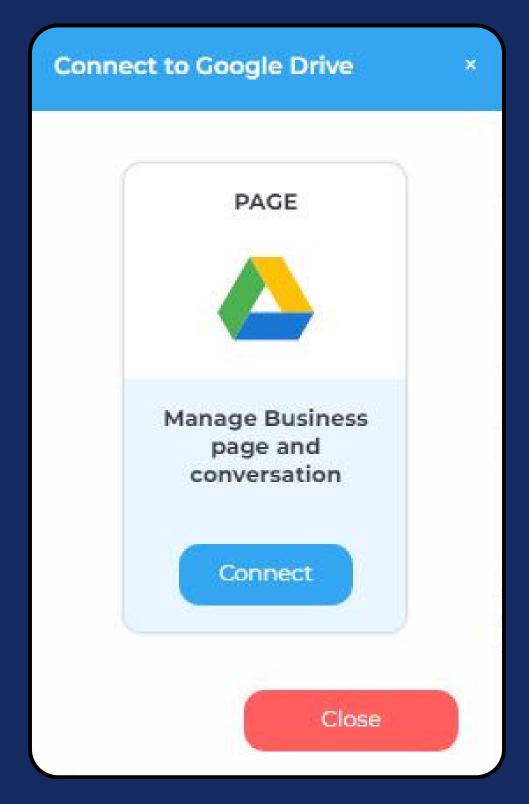
Steps for Adding a Google My Business

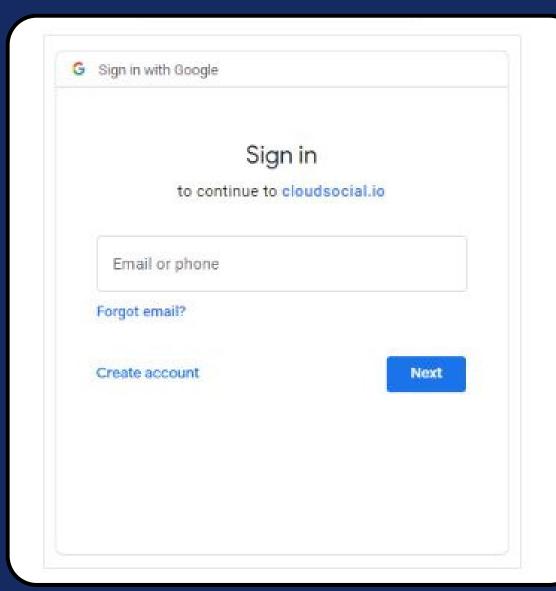
Once you click on Google My Business, this screen will open up.

- Click on Connect.
- You will be asked to login to GMB.
- GMB will seek your permission to give access to Google account, Continue.
- Your GMB will get added.
- Click on the check box and Submit.

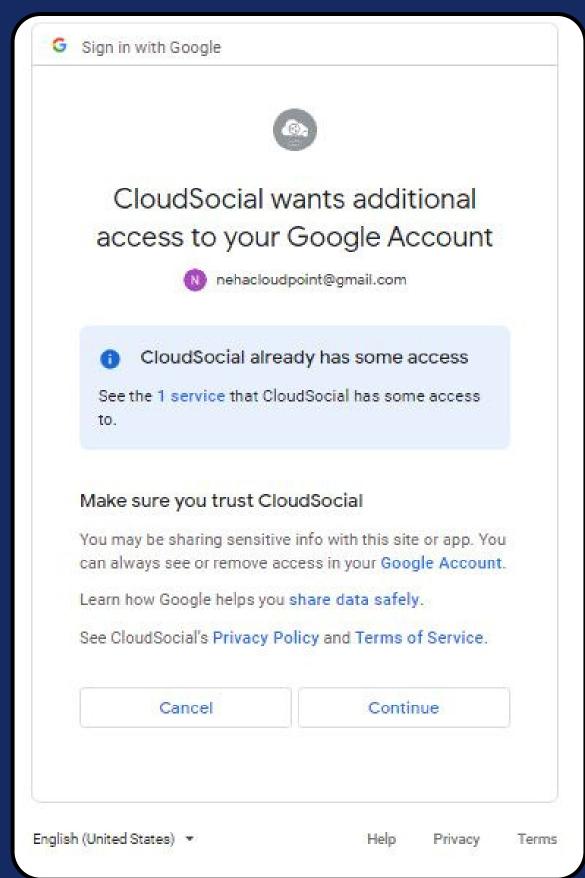




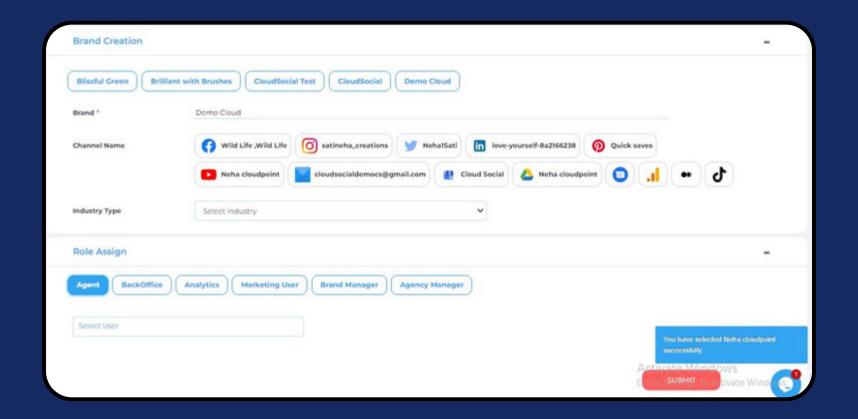
















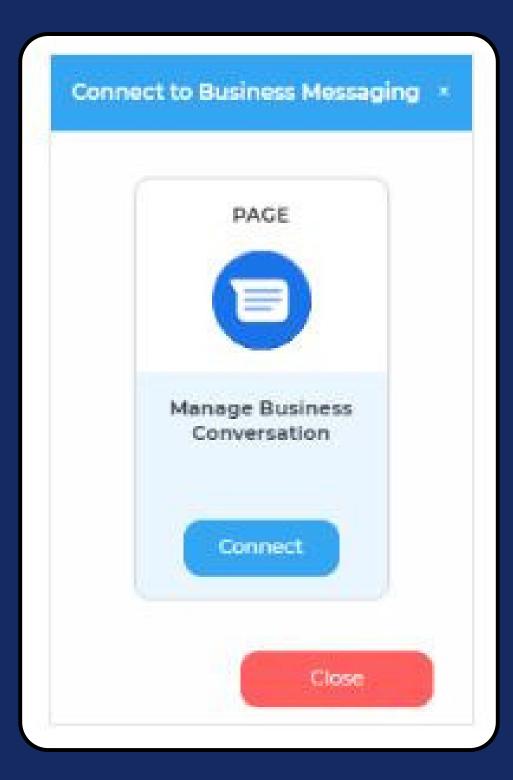
Steps for Adding a Google Drive

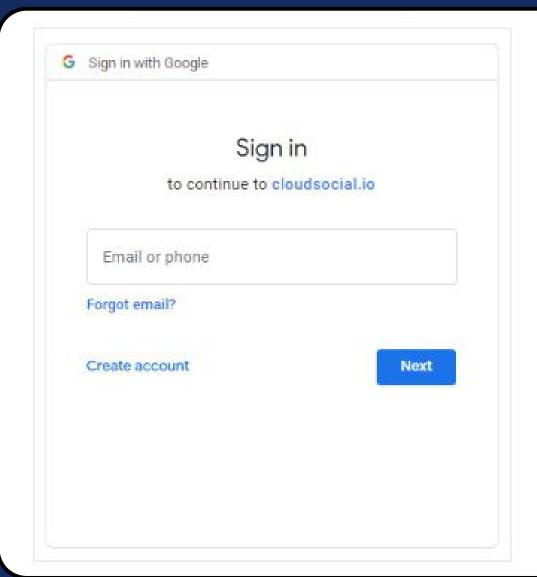
Once you click on Google Drive, this screen will open up.

- Click on Connect.
- You will be asked to login to Google Drive.
- Google Drive will seek your permission to give access to Google account, Continue.
- Your Google Drive will get added.
- Click on the check box and Submit.

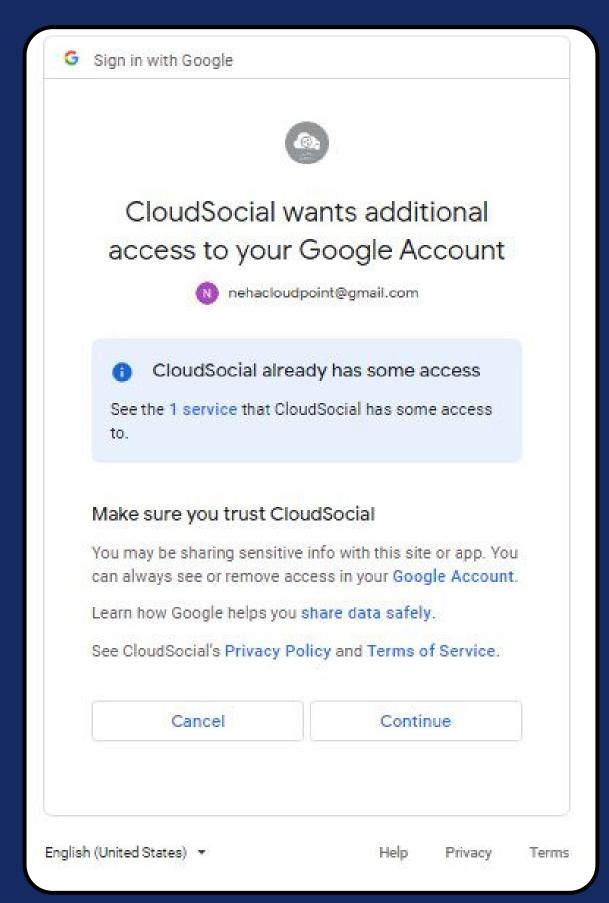


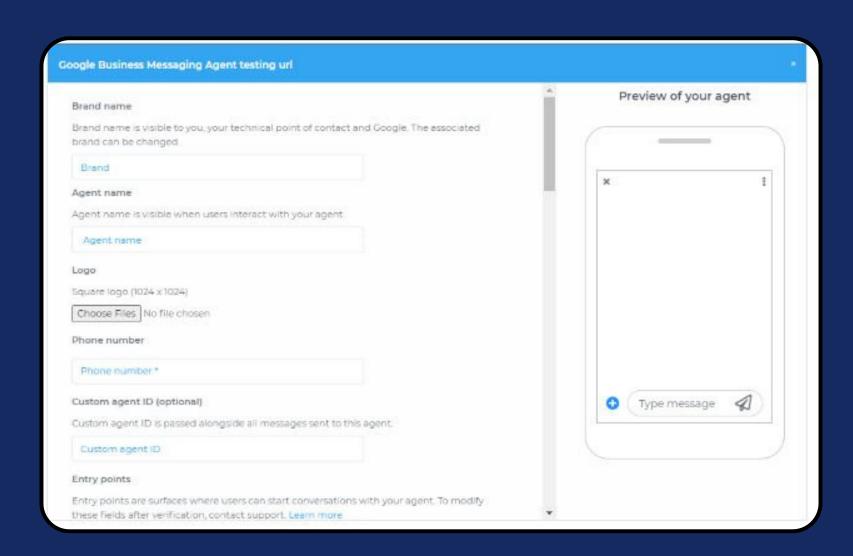
# Google Business Messaging















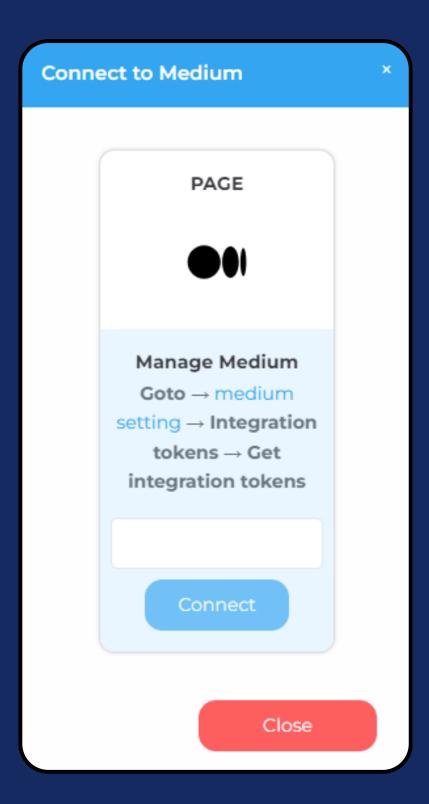
Steps for Adding a Google Business Messaging

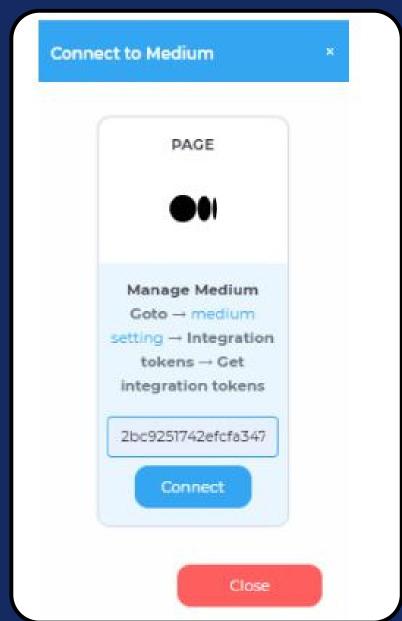
Once you click on Google Business Message, this screen will open up.

- Click on Connect.
- You will be asked to login to Google Business Message.
- Google Business Message will seek your permission to give access to Google account, Continue.
- Fill the mandatory details.
- Your Google Business
  Messaging will get added.
- Click on Submit.



### Medium









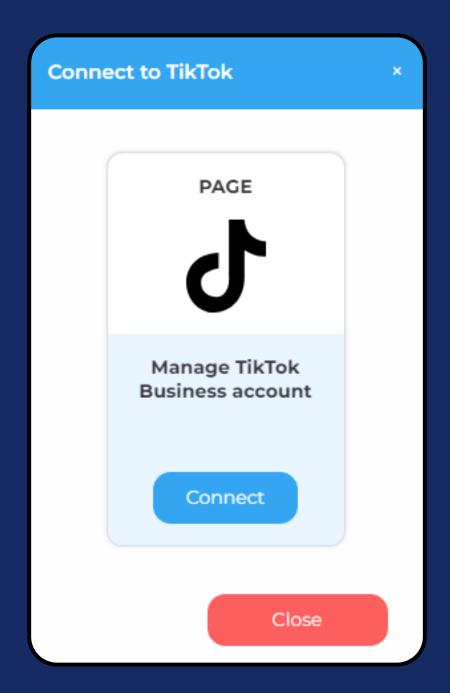
#### Steps for Adding a Medium

Once you click on Medium, this screen will open up.

- Click on Connect.
- Go to medium setting.
- Security and apps.
- Integration token.
- Get integration token.
- Enter the integration token.
- Click on connect.







#### Log in to TikTok

Manage your account, check notifications, comment

on videos, and more. Use QR code 2 Use phone / email / username A Continue with Facebook Continue with Google G Continue with Twitter Continue with Apple Continue with Instagram

By continuing, you agree to TikTok's Terms of Service and confirm that you have read TikTok's Privacy Policy.



#### Authorize CloudSocial to access your TikTok account?



cloudsociaLio Switch account

#### CloudSocial

#### CloudSocial would like to:

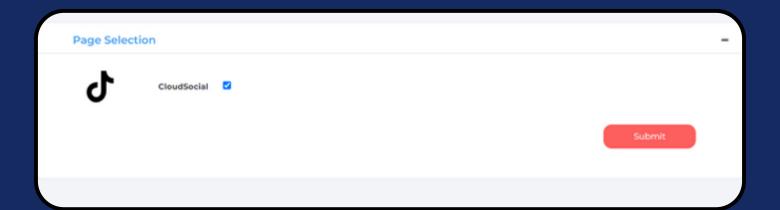
- Access your profile info (avatar, display name, like count, follower count, following count, verified status)
- Read your public videos on TikTok
- Share videos as a draft to your TikTok account.

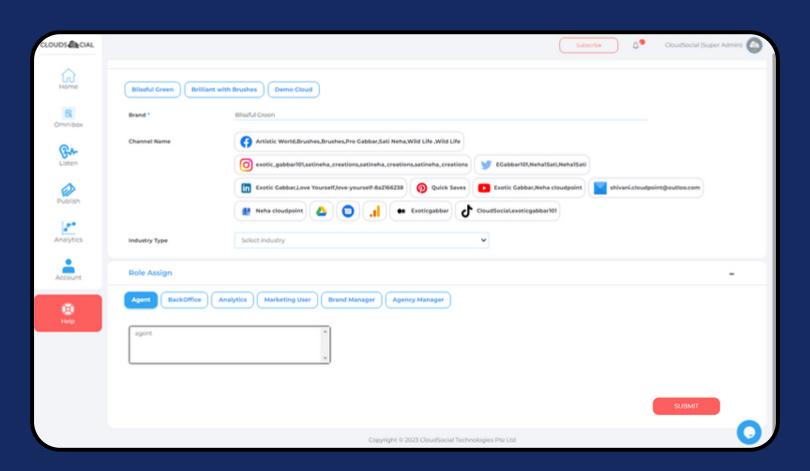
You can manage this setting via "Edit access". To revoke access after the authorization, go to TikTok mobile app > "Settings and privacy" > "Security and login" > "Manage app permissions".

#### Edit access >

Make sure you trust this website or app. By tapping "Authorize", you agree to CloudSocial Terms of Service and acknowledged that you have read its Privacy Policy.











#### Steps for Adding a Tiktok

Once you click on tiktok, attached screen will open up.

- Click on Connect.
- You will be asked to login to tiktok.
- Tiktok will seek your permission to give access to Google account, Continue.
- Your Tiktok will get added.
- Click on the check box and Submit.