

Scheduling Email Reports in Benchmark

In Benchmark, you can choose to schedule your Brand Insights and Content Analysis dashboards as email reports in PowerPoint (PPT) format, as well as schedule email reports on outliers and keyword queries in your Content Analysis dashboard, allowing you to share your findings with stakeholders. In this article, find out how to schedule dashboard, outlier, and keyword query reports by email and learn what options are possible for each.

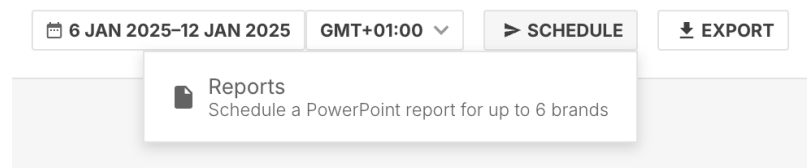
Note:

For US clients, this feature is accessible to Pro/Premium accounts only. If you are a US client with a Standard account and would like to upgrade your package, contact your Customer Success Manager (CSM) or Brandwatch Support.

Scheduling PPT reports

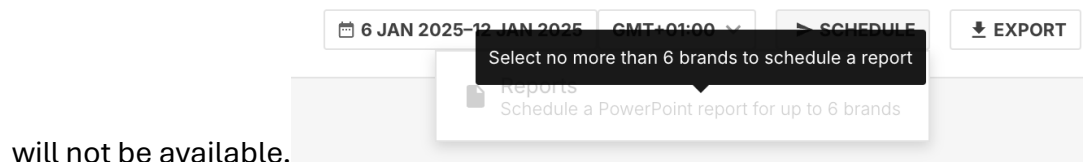
You have the option to send and schedule Benchmark PowerPoint (PPT) reports showcasing up to 6 Benchmark brands to internal Social Media Management users via email.

1. In the top-right corner of a Benchmark dashboard, click **Schedule** to set up a scheduled report.



Note:

The report will be set up with the brands and networks you have selected in your Benchmark dashboard. You can create a report with up to 6 brands selected in your dashboard. If more than 6 brands are selected in your dashboard, the **Schedule** feature



will not be available.

2. In the scheduling panel under **Choose recipients**, enter the recipients you would like to share the report with. Search for internal Social Media Management users or

teams to send your report to.

Schedule report via email

×

Schedule a PowerPoint report of all recent activity.
The report will be delivered via scheduled email to people from your organization.

Choose recipients

Q Alanna Marwyn ×

Add Brandwatch teams or users

Manage contents

Brands LONOWEAR FREET BAREFOOT XERO SHOES GROUNDIES VIVOBAREFOOT

Networks FACEBOOK INSTAGRAM X(TWITTER)

Based on last

7 DAYS WEEK 30 DAYS MONTH 90 DAYS

Define frequency

Repeat every

WEEK 2 WEEKS MONTH 3 MONTHS









Repeat on

MON TUE WED THU FRI SAT SUN

SAVE AND SCHEDULE

- Under **Manage contents**, you will see the brands and networks selected in your Benchmark dashboard. You can adjust the Data toggle to display data for either the last 7 days, week, 30 days, month, or 90 days.
- Under **Define frequency**, select the cadence for how often you would like the report to be generated via email (repeat every week, 2 weeks, month, or 3 months) and on what day of the week.
- When ready, click **Save and Schedule**.

Your report will be delivered on the set cadence and to the users you specified. If you need to edit your report settings, or delete a scheduled report, you can do so via the **Manage Reports** section in Benchmark’s navigation sidebar.

Manage scheduled reports					
BRANDS	NETWORKS	RECIPIENTS	FREQUENCY	CREATED	
		Marina Kostina	Every week	Jan 13, 2025	 EDIT  DELETE
		Marina Kostina	Every month	Jan 13, 2025	 EDIT  DELETE

Scheduling outlier reports

Tip:

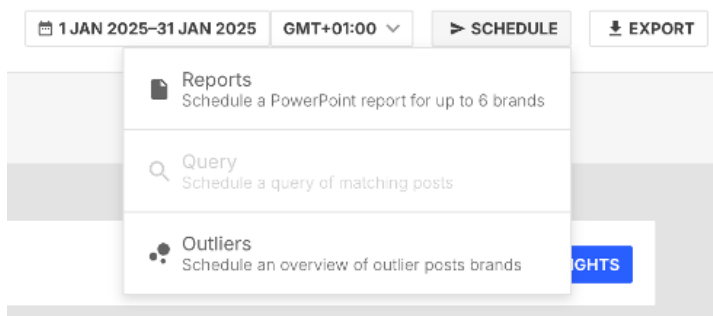
Outliers are posts that perform above the brand's baseline numbers. Visit our help center article on the Content Analysis dashboard to learn how to view your [outliers](#) in Benchmark.

You can set up a notification to be notified on a daily or weekly cadence whenever Benchmark detects new outlier posts.

1. In the top-right corner of a Benchmark dashboard, click **Schedule** and choose **Outliers**.

Note:

The report will be set up with the brands and networks you have selected in your Benchmark dashboard.



2. In the scheduling panel under **Choose recipients**, enter the recipients you would like to share the report with. Search for internal Social Media Management users or

teams to have the report delivered directly to your stakeholders.

Schedule outlier via email ✕

Schedule an overview of all outlier posts for the reporting period.
The link to it will be delivered via scheduled email to people from your organization.

Choose recipients

🔍 Marina Kostina ✕ Add Brandwatch teams or users

Manage contents

Brands **TOYOTA** BMW

Networks **FACEBOOK** INSTAGRAM

Based on last **7 DAYS** WEEK 30 DAYS MONTH 90 DAYS

Define frequency

Send **DAILY** WEEKLY

Repeat on MON TUE WED THU FRI SAT SUN

SAVE AND SCHEDULE

3. Under **Manage contents**, you will see the brands and networks selected in your Benchmark dashboard. You can adjust the **Based on last** toggle to display data for either the last 7 days, week, 30 days, month, or 90 days.
4. Under **Define frequency**, select the cadence for how often you would like the report to be generated and sent via email (repeated daily or weekly) and on what day of the week.
5. When ready, click **Save and Schedule**.

Once you have scheduled the notification, Benchmark will send an email to the users/teams selected on the set cadence highlighting the number of new outliers in the selected period.

Note:

Notifications are not sent immediately when a new post is detected, so this tool is not intended for monitoring/alerting nor recommended as a replacement for crisis alerting.

Scheduling keyword query reports

You can set up a notification to be notified on a daily or weekly cadence whenever new posts appear that match a keyword search you have created in Benchmark.

First, search for the desired keyword(s) in Benchmark's content feed. Then, schedule the notification.

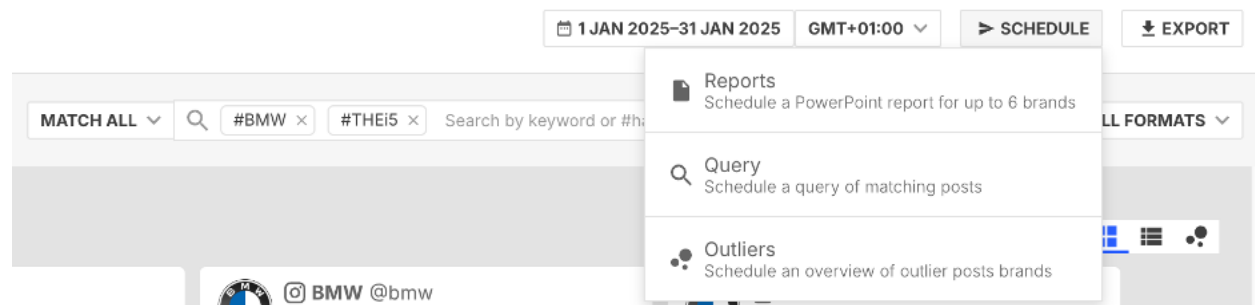
Note:

If you have not entered any search keywords in your dashboard's search bar, the Query option in Schedule will be disabled.

1. In the top-right corner of your Benchmark dashboard after adding search keywords in the search bar, click **Schedule** and choose **Query**.

Note:

The report will be set up with the brands, networks and post types you have selected in your Benchmark content feed. It will also have the same logic to combine keywords that you used when searching.



2. In the scheduling panel under **Choose recipients**, enter the recipients you would like to share the report with. Search for internal Social Media Management users or

teams to have the report delivered directly to your stakeholders.

The screenshot shows a modal window titled "Schedule query via email" with a close button (X) in the top right corner. Below the title is a descriptive text: "Schedule a saved query including all matching posts for the reporting period. The link to it will be delivered via scheduled email to people from your organization." The form is divided into three main sections: "Choose recipients", "Manage contents", and "Define frequency".

Choose recipients: A search bar contains "Marina Kostina" with a close button (X) and a placeholder text "Add Brandwatch teams or users".

Manage contents: This section includes several filter groups: "Brands" with "TOYOTA" and "BMW" selected; "Networks" with "FACEBOOK" and "INSTAGRAM" selected; "Keywords" with "MATCH ALL", "#BMW", and "#THEIS" buttons; "Formats" with "ALL FORMATS" selected; and "Based on last" with a row of buttons: "7 DAYS", "WEEK" (highlighted in blue), "30 DAYS", "MONTH", and "90 DAYS".

Define frequency: This section includes "Send" with "DAILY" and "WEEKLY" buttons (where "WEEKLY" is highlighted in blue), and "Repeat on" with a row of buttons: "MON" (highlighted in blue), "TUE", "WED", "THU", "FRI", "SAT", and "SUN".

At the bottom right of the modal is a blue button labeled "SAVE AND SCHEDULE".

3. Under **Manage contents**, you will see the brands and networks selected in your Benchmark dashboard. You can adjust the **Based on last** toggle to display data for either the last 7 days, week, 30 days, month, or 90 days.
4. Under **Define frequency**, select the cadence for how often you would like the report to be generated and sent via email (repeated daily or weekly) and on what day of the week.
5. When ready, click **Save and Schedule**.

Once you have scheduled the notification, Benchmark will send an email to the users/teams selected on the set cadence highlighting the number of new posts matching the query in the selected period.

Note:

Notifications are not sent immediately when a new post is detected, so this tool is not intended for monitoring/alerting nor recommended as a replacement for crisis alerting.