Scheduling Measure Dashboards

In Measure, you can easily share your dashboards externally or export your dashboards as a CSV file. Using the schedule tool, you can also schedule automated dashboard links or CSV exports to be sent to any user via email.

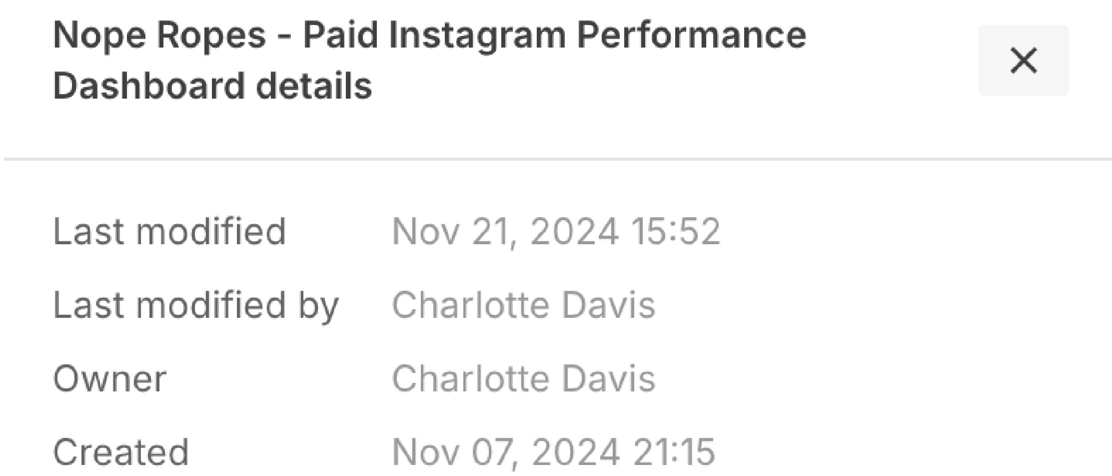
In this article, find out how to set up scheduled reports, what information can be sent, and how to customize the data.

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.

Which dashboards can be scheduled?

You can set up scheduled email reports for any dashboard you own. However, it's not possible to schedule email reports for dashboards that were shared with you by another user. If you're not sure whether or not you're a dashboard's owner, you can click the information symbol next to the dashboard's name to view its



details:

While creating a new dashboard schedule, you can customize the following:

- **Format**: Choose whether recipients receive a public link to the dashboard or a CSV export of the data.
- **Date range**: Choose the amount of data to be included in each report (previous 7 days, previous 30 days, etc.).

- **Frequency**: Choose how often recipients receive reports (weekly, every 2 weeks, etc.).
- (Optional) Add a note to include in the body of the email.
- (Optional) Choose one key metric widget from your dashboard to be embedded in the email.

Find out more about the available format, date range, and frequency options below.

Note:

If you edit a dashboard in Social Media Management — such as, to rearrange the widgets, change the metrics, or add channels — all changes to the dashboard will be reflected in future scheduled emails.

Who can receive scheduled dashboard emails?

You can set up scheduled dashboard emails to be sent to anyone, whether they're an external user or included in your Social Media Management organization. When you're setting up new scheduled dashboard emails, you will have the option of including the following:

- Any Social Media Management users in your organization (by searching the name of the user)
- Entire teams in your Social Media Management organization (by searching the name of the team)
- Any external recipients (by entering the email address)

Note:

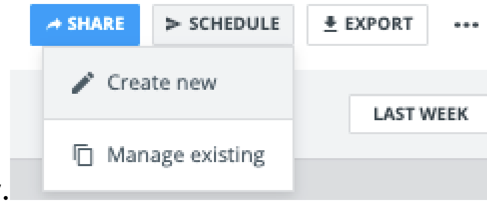
You may include a total of **20 entries/recipients**. Selecting a team will count as one entry/recipient, even if the team includes several users.

Scheduling dashboard emails

To schedule a dashboard, follow the steps below:

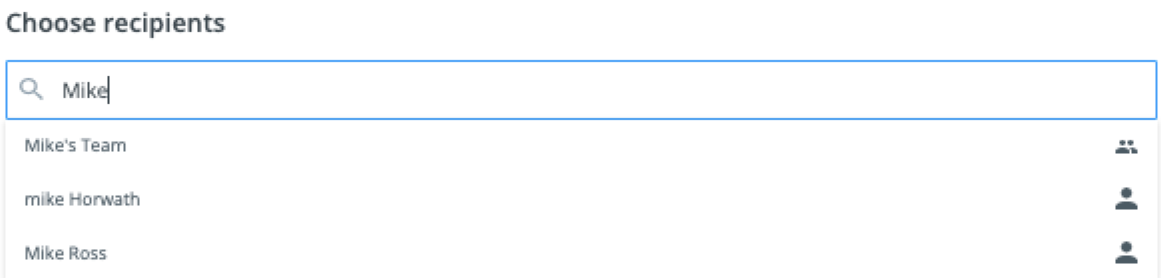
1. Open any Measure dashboard that you have created (rather than a Dashboard that was shared with you by another user).

2. Click **Schedule** in the top right of your dashboard.

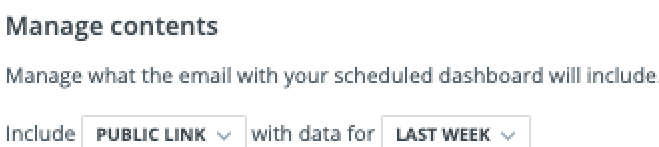


3. From the dropdown menu, click **Create New**.

4. Under **Choose recipients**, either search for existing Social Media Management users and teams, or manually enter any external email address. If searching by name, use the icons on the right to differentiate between users and teams. Please bear in mind that you can only include a total of 20 entries/recipients.



5. Under **Manage contents**, choose between a public link or a CSV export. To the right, select how far back you would like the data to go.



Note:

If you are scheduling a Content Performance or Label Performance dashboard, you will also have the option to select the time zone you would like your posts to display in.

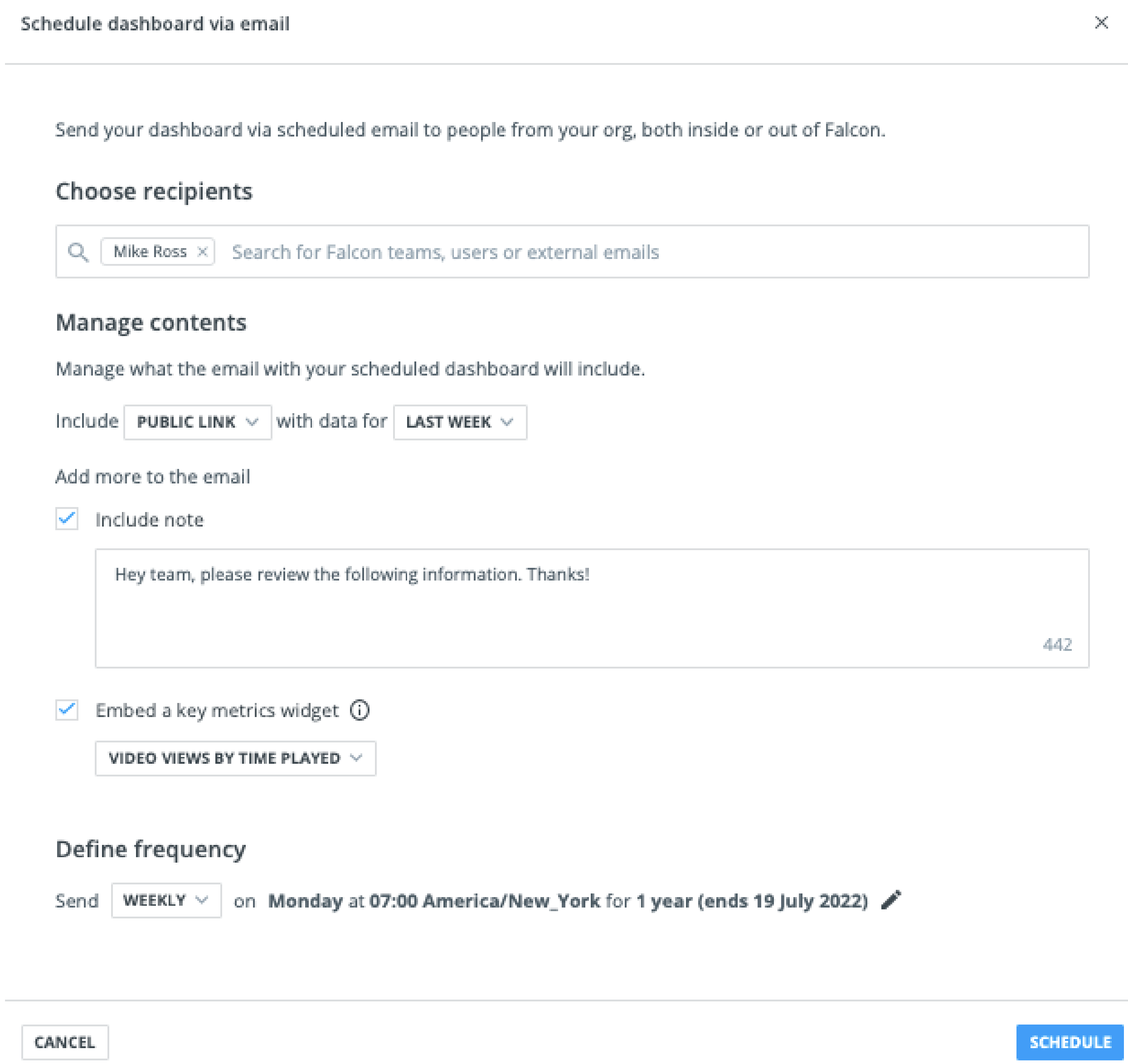
6. Optional: Click the **pencil icon** to edit notes or add an embedded key metric widget

from your Dashboard.

7. Under **Define frequency**, use the dropdown to select how often emails will be sent. More information on the available date range and frequency options can be found in the section below.

8. Optional: Under **Define frequency**, click the pencil icon to edit the specific day of the week, time, and total duration the recipients will receive emails.

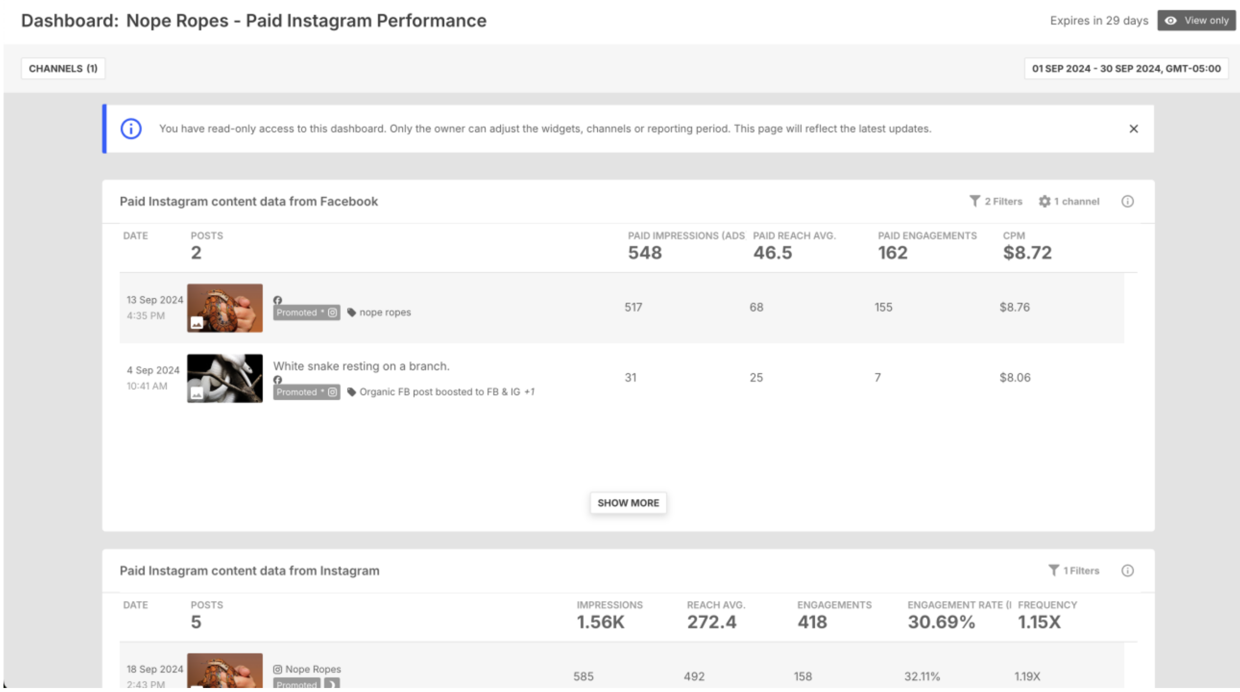
9. From the bottom right, click **Schedule**.

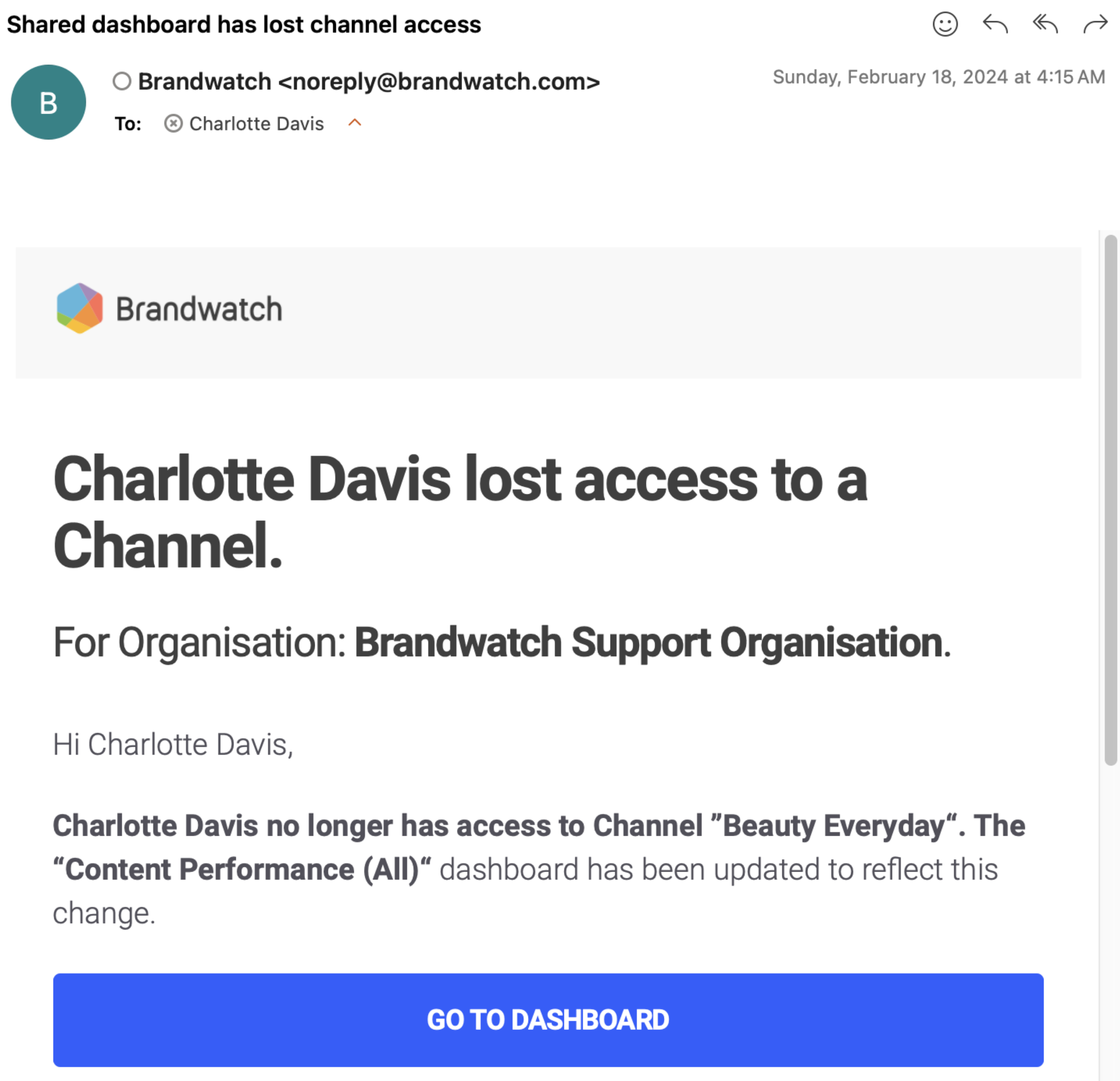


Format options

Scheduling a dashboard as a public link

When you schedule send a dashboard as a public link, the email will contain a URL that links to a view-only version of the dashboard. Recipients will not be able to make any changes to the dashboard's date range, channels, metrics, or other details. However, the dashboard will automatically be updated with any changes made in Measure.





Shared dashboard has lost channel access

Brandwatch <noreply@brandwatch.com>

To: Charlotte Davis

Sunday, February 18, 2024 at 4:15 AM

Brandwatch

Charlotte Davis lost access to a Channel.

For Organisation: **Brandwatch Support Organisation**.

Hi Charlotte Davis,

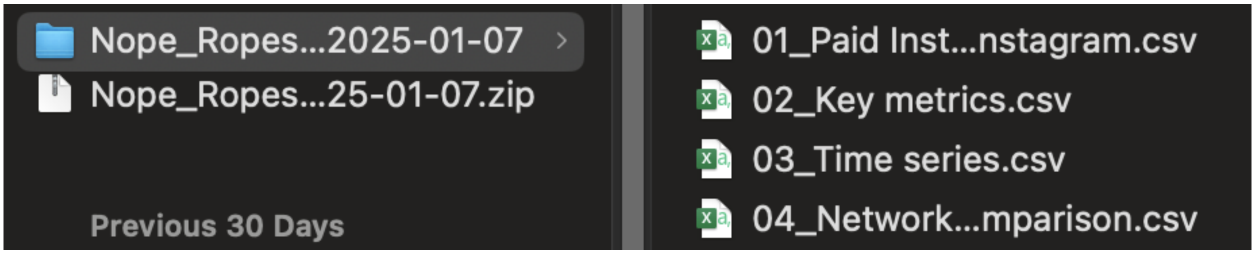
Charlotte Davis no longer has access to Channel "Beauty Everyday". The "Content Performance (All)" dashboard has been updated to reflect this change.

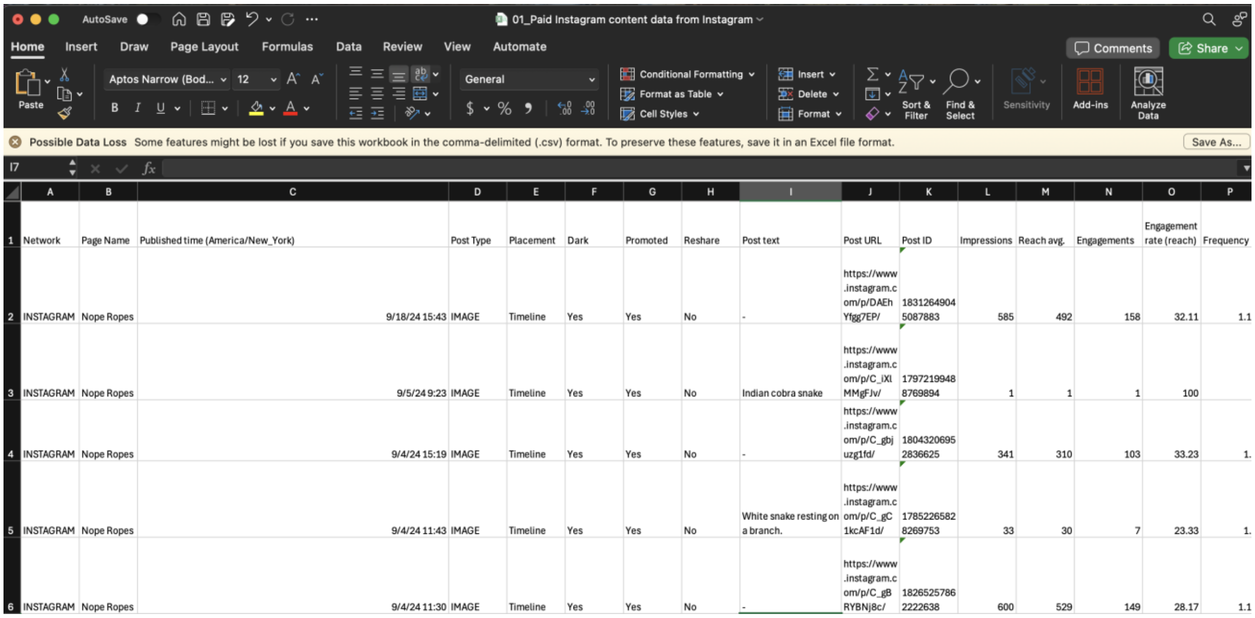
GO TO DASHBOARD

Public links are a much more user-friendly way of presenting your dashboard data than a CSV file, but at the cost of customization. They are ideal for stakeholders who need to take in information quickly.

Scheduling a dashboard as a CSV file

When you schedule send a dashboard as a CSV file, the email will contain an attachment of a ZIP file, and the ZIP file will contain separate CSV files for each widget in the dashboard. Recipients can open these in the program of their choice (Excel, Sheets, Numbers, etc.), where they can reorganize the information freely. However, CSV files will not be automatically updated with any changes you make to the dashboard in Measure.





Network	Page Name	Published time (America/New_York)	Post Type	Placement	Dark	Promoted	Reshare	Post text	Post URL	Post ID	Impressions	Reach avg.	Engagements	Engagement rate (reach)	Frequency
INSTAGRAM	Nope Ropes	9/18/24 15:43	IMAGE	Timeline	Yes	Yes	No	-	https://www.instagram.com/p/DAEhYfgg7EP/	18312649045087883	585	492	158	32.11	1.1
INSTAGRAM	Nope Ropes	9/5/24 9:23	IMAGE	Timeline	Yes	Yes	No	Indian cobra snake	https://www.instagram.com/p/C_iXlMMgFJv/	17972199488769894	1	1	1	100	
INSTAGRAM	Nope Ropes	9/4/24 15:19	IMAGE	Timeline	Yes	Yes	No	-	https://www.instagram.com/p/C_gbjuzg1fd/	18043206952836625	341	310	103	33.23	1.
INSTAGRAM	Nope Ropes	9/4/24 11:43	IMAGE	Timeline	Yes	Yes	No	White snake resting on a branch.	https://www.instagram.com/p/C_gC1kcAF1d/	17852265828269753	33	30	7	23.33	1.
INSTAGRAM	Nope Ropes	9/4/24 11:30	IMAGE	Timeline	Yes	Yes	No	-	https://www.instagram.com/p/C_gBRYBNj8c/	18265257862222638	600	529	149	28.17	1.1

CSV files offer more freedom and customization than public links, but at the cost of accessibility. They are ideal for stakeholders who need to interact with your data more extensively or incorporate it into their own reporting tools.

Date range options

When you're selecting a date range for your Scheduled Email, you can use a dropdown to choose from the options listed below.

Last week

The previous calendar week from Monday to Sunday.

Previous 7 days

The last seven days of complete data, not including the day the email will arrive.

Last month

The last complete month from the 1st to the last day. For example, sent in the middle of June, all of May will be selected.

Previous 30 days

The previous 30 days of complete data, not including the day the email will arrive.

This month

All available data from the 1st of the current month, not including the day the email will arrive.

Previous 90 days

The last 90 days of complete data, not including the day the email will arrive.

Previous 365 days

The last 365 days of complete data, not including the day the email will arrive.

Frequency options

When you're customizing the email frequency, you can choose for emails to arrive weekly, every 2 weeks, monthly, or every 3 months.

If you select **weekly** or **every 2 weeks**, you must also select the day of the week you would like emails to arrive along with the time. If you select **monthly** or **every 3 months**, you must also select which day of the month (e.g., 1st, 2nd, or 3rd) along with the time.

By default, the Scheduled Emails will continue for one year. However, under **Define frequency**, you can adjust the duration to a minimum of one month and a maximum of two years.

Please bear in mind that, when scheduling Dashboards, the time zone will default to your current time zone and can't be adjusted.

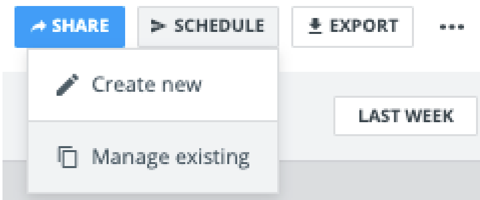
Note:

Scheduled Emails will begin on the **next matching day** as defined by your email frequency, excluding the day it was created. For example, if you create a Scheduled Email on a Monday which is intended to be sent every Monday, the first email will be sent next Monday.

Editing and Deleting Existing Scheduled Dashboard Emails

If Scheduled Dashboard emails have already been created for an existing Dashboard, you can make adjustments by following the steps below:

1. Open any Measure Dashboard which was created by you (rather than a Dashboard which was shared with you by another user).
2. From the top right, click **Schedule**.
3. From the dropdown menu, click **Manage existing**.



4. From the list of existing Scheduled Dashboard Emails, click the **context menu (three dots)** on the right-hand side of the email you would like to adjust.
5. Select either **Edit** or **Delete**.