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Q Search Consumer Research...

Section: Dashboards

The Dashboard Wizard

1 year ago · Updated · [Print/PDF](#)

Translate this article:

The Dashboard Wizard slices and dices your data by creating **Categories** and **Rules** based on your responses to questions, generating a pre-filtered **Dashboard** to look at your desired segmentation.

- **Overview**
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Overview

The Dashboard Wizard allows you to create a fully functioning dashboard in minutes without the need to write your own rules or categories, while still giving you the option to edit the parameters.

PRODUCTS

HASHTAGS

PEOPLE

CONTENT

SUMMARY

Breakdown by Brand Products

Focus on and compare conversations about the brand's specific products. (You can enter any useful category here e.g. TV characters, features or events)

No thanks

Break down by brand products

| | | |
|-------------------|------------------------------|---|
| phish food | fish food | × |
| empower mint | Click to add product aliases | × |
| caramel chew chew | Click to add product aliases | × |
| peanut butter cup | Click to add product aliases | × |
| Cherry garcia | Click to add product aliases | × |

Add another product

* required fields

<

Next

BETA

How can we make the Dashboard Wizard better? [Let us know](#)

Using the Dashboard Wizard doesn't add to your current data usage. Instead, it segments your existing data in ways defined by you, allowing you to get the most out of your queries.

There are currently two Dashboard Wizards to choose from, aimed at solving two different use cases:

- **Brand Monitoring:** Create the perfect dashboard for monitoring a single brand using a **brand query**. The brand monitoring dashboard wizard enables you to explore the key metrics and conversations about the brand, as well as segment your data by product, hashtags, and key people.
- **Campaign Tracking:** Delve into the hashtags of a query you have created to look at the impact of a particular campaign and highlight any major strengths or weaknesses.

Using the Dashboard Wizard

To use the Dashboard Wizard, navigate to the **Add Dashboard** section of Consumer Research and click **Add Dashboard**. Scroll down to the bottom of the **New dashboard** window and select

either the **Brand Monitoring** or **Campaign Tracking** option.

Dashboard wizard



Template > Set up

CANCEL

NEXT

Answer questions from the Dashboard Wizard prompt to generate your dashboard. The wizard will first ask you to select an existing data source (query) within your Consumer Research project. Once selected, the wizard will ask you questions about whether you would like to segment your data by a particular aspects, such as brand products, hashtags, key people, etc. Selecting these options will allow you to enter details about the segmentation. These inputs will then be used in the creation of the **Rules** and **Categories** for the dashboard. If you used the **brand query template** to create your query, some fields may already be filled out for you. Feel free to edit these suggestions based on your preferences.

☒ Break down by brand products

| | | |
|-------------------|--|---|
| phish food | Click to add product aliases | × |
| empower mint | Click to add product aliases | × |
| caramel chew chew | Click to add product aliases | × |
| peanut butter cup | Click to add product aliases | × |
| Cherry garcia | Click to add product aliases | × |

[Add another product](#)

* required fields

We've added these products from your Query "[QW] Ben and Jerry's". You can remove them or add more.









Certain tabs within the dashboard will only be created if you have chosen that you would like to break down by that aspect, so it's expected that the dashboard created by the process might look a little different each time.

Note: The Dashboard Wizard only segments your data. If your query is not tracking a particular topic, segmenting by it won't have the desired effect as you're not tracking the data. To add it to your setup, you'll need to edit the query to track the topic and then segment by it using the Dashboard Wizard.

Generated items and naming conventions

You can find all the outputted items of a Dashboard Wizard (including the dashboard itself and any generated categories and rules) within their respective sections in Consumer Research, just like normal dashboards, categories, or rules. Each can be easily found within the list, as they will have **[WIZARD-N]** at the start of the name. (The number N increments with each new use of the wizard, so you'll always know which categories and rules relate to which dashboard).

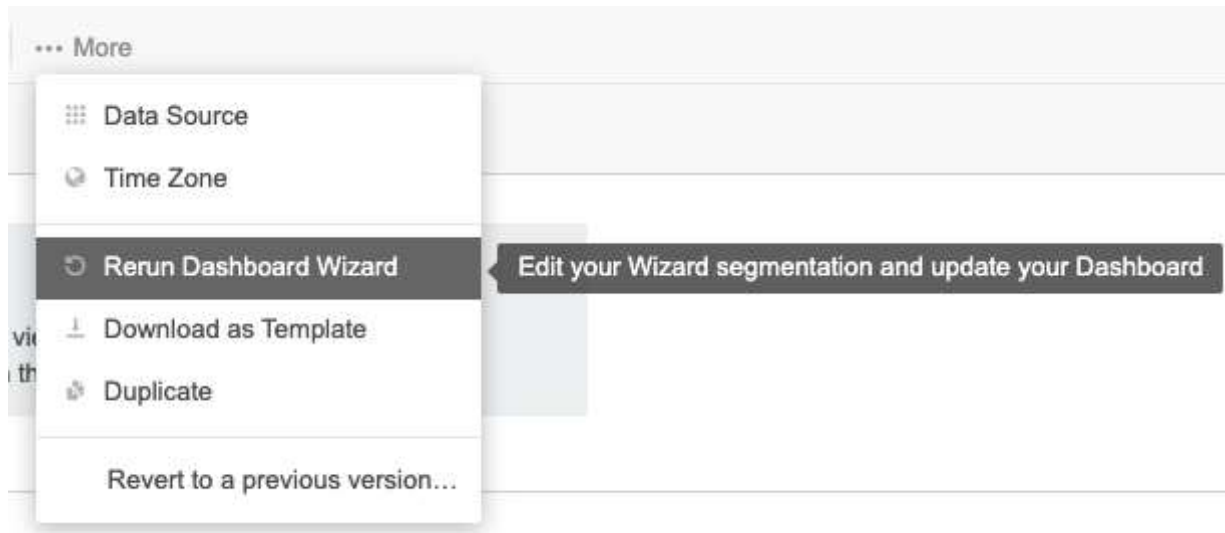
Categories + New

| Q Search Categories | | | |
|--|---|----------------|--|
| PARENT CATEGORY NAME | CATEGORIES | DATA SOURCES | TYPE |
| [Wizard-1] Content Types | Images, Videos | Ben and Jerrys | Keywords   |
| [Wizard-1] Products | phish food, empower mint, caramel chew... | Ben and Jerrys | Keywords   |
| Basic Flavor | Chocolate, Vanilla, Strawberry | Ben and Jerrys | Manual   |
| Flavor | American Dream, Chunky Monkey, Coffe... | Ben and Jerrys | Manual   |

Looking at the categories and rules generated by the wizard is a great way learn about customizing your own categories and rules.

Rerunning the Dashboard Wizard

It's possible to rerun the Dashboard Wizard to add additional terms or remove terms from the segmentation. Doing so will effectively wipe the entire setup, deleting all categories and rules previously created by the wizard as well as the dashboard itself and creating it again with new details. Be aware that when rerunning the wizard, any manual edits you've made to the existing setup will be deleted.



To rerun the Dashboard Wizard for the current dashboard, click **More > Rerun Dashboard Wizard** and go through the wizard again.

Deleting a wizard dashboard and its items

You can easily delete the wizard dashboard and all of the items it has generated by clicking the **Delete** button on the dashboard itself. You will have the option to either delete all of the created items within the dashboard, or delete only the dashboard.

Dashboards

Analyze your data using a range of charts and other visualizations.

ADD DASHBOARD

✓ All Your dashboards Shared with you Shared with others

| Dashboard name | Sharing | Time zone | Modified ▼ | |
|--|---------|----------------------------|-----------------|---|
| [Wizard-1] ben & jerry's Owned by bhillier@brandwatch.com | | Europe/London (UTC +00:00) | Wed 29 Sep 2021 | <div>Delete this dashboard</div> <div> </div> |

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