

Automation in Engage

With automation in Engage, you can let Social Media Management handle repetitive tasks such as labeling, assigning, hiding, marking as read, marking as spam, and sending welcome or away messages. Apply Engage automations to your incoming posts, comments, replies, and direct messages (DMs), allowing you to spend your time on important conversations with your customers. In this article, find out more about the available automation features in Engage and how to set them up.

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.

Note:

Once automations are set up, they will only trigger for future events or content and will not trigger for existing content already within the platform. This applies to both automated messages and automation rules.

Automation rules

Note:

Only Admin and Team Lead users can create automation rules.

When creating automation rules, such as those to automatically label and assign messages or mark them as spam, etc. you choose one or several conditions, or triggers, and one or more actions to take when those conditions are met. You have the option to apply your rules to either your incoming content, own content, or both. Once the automation rule is active, Social Media Management will review each new piece of Engage content or Publish post for a match with your rule. If a match is found, it executes the action you set.

You can choose if you want the automation rule to trigger based on one of your chosen conditions (Match Any), or all of them (Match All).

Available conditions and actions

You can choose from the following "If" conditions:

Detected language

Triggers based on the selected language detected. For more information and a full list of languages supported, please see our [Language Support](#) article.

Text

Triggers based on one or a few keywords in the post copy. You can decide if some, all, or none of those keywords should be included. It's possible to add a comma-separated list of words or phrases.

Network

Triggers based on the network the content comes from. You can choose from Facebook, Twitter, Instagram, TikTok, WhatsApp, LinkedIn, YouTube, or Google Business Profile. You can either include or exclude them from the trigger.

Channel

Triggers based on the channel the content comes from. You can either include or exclude a channel to filter mentions from the channel in/out of your feed.

Content type

Triggers based on the content type. You can choose posts, comments, replies, or direct messages, and you can either include or exclude them from the trigger.

You can choose from the following "Then" actions:

Assign to

Assigns the piece of content to a user or a team.

Add labels

Adds one or more labels of your choice to the piece of content. Not available for Instagram Stories.

Mark as read

Marks messages as read. Messages with this automation applied will be tagged that the message was read by Brandwatch automation. Messages that are automatically marked as read will not be attributed to a specific team in the Team Performance Report.

Mark as spam

Marks messages as spam in Engage. This is a internal action and will not report the message as spam to the native network.

Hide on network

Hides messages in Engage and on the native network. This works for messages on which the action is supported by the network's API (e.g. comments on own posts on Facebook, Instagram, TikTok, X (Twitter) and YouTube. This is also supported for comments on Facebook fan posts).

Automated case creation

Allows you to automatically generate cases based on predefined conditions, ensuring that important issues are tracked and resolved without manual intervention. When a rule is triggered, a new case is created in the system and the description includes the name of the automation rule and the URL to the conversation. This helps streamline workflows, improve response times, and maintain consistent handling of customer interactions.

Note:

Replies to your Instagram Stories will trigger any automations you've set up for direct messages. However, your automations will not be triggered by Story mention notifications — when another account mentions yours in their Story — even though these notifications are delivered as direct messages.

Creating an automation rule

You can create a rule in just a few simple steps. Please bear in mind that only **Admin and Team Lead** users in Social Media Management can create, edit, copy, and delete rules. (Team Leads will be required to select the channel for which they are creating the rule). Furthermore, there are a few practical limitations to the size of your automations. There is a maximum of:

- 25 keywords per condition (however, the **Text** condition can be applied multiple times in the same rule).

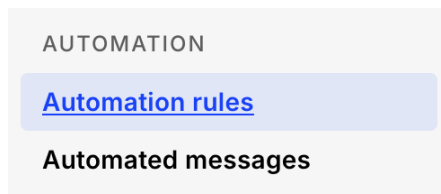
Warning:

Please be aware that all special characters (e.g. "#," ":", etc.) are not currently supported in automation rule keywords and will be stripped from the keyword.

- 10 conditions per rule.










Here's how you can create your rules:

1. In the left-hand sidebar in Engage, select **Automation rules** under Automation.



2. Click **Create Rule** in the top right.

Automation rules 37 CREATE RULE

NAME	IF	THEN	APPLY TO	CREATED	LAST TRIGGERED	
Language rule	content type is any of "message" and detected language is any of "Afrikaans"	Assign to Martine Jensen Moderator	Incoming content	3 Jun 2024, 14:56	Never	  
Martine 3 new	text contains any of "spring" and channel is any of "Fans of Traveling"	Add labels "spring", "00e"	Incoming content, Own content	3 Jun 2024, 14:33	34 minutes ago	  
Hot tea posts	content type is any of "post", "comment", "reply", "message" and channel is any of "Hot Tea"	Create external case in salesforce	Incoming content	3 Jun 2024, 12:10	3 hours ago	  

3. Choose your **If** condition and **Then** action from the available options.

Create rule

×

Conditions

MATCH ALL ▾

If

SELECT CONDITION ▾

+ Add condition

Actions

Then

SELECT ACTION ▾

+ Add action

Create rule

×

Conditions


MATCH ALL ▾

If

Channel

IS ANY OF ▾

HOLLAN VINTAGE BOOKS ▾




+ Add condition

Actions

Then

ASSIGN TO ▾

ALANNA ▾




+ Add action

Note:

Keywords and phrases are case sensitive.

Note:

When adding text keywords and phrases, be sure to press **Enter** after typing each keyword or phrase. That will create a card for them in the text box.

If **Text** CONTAINS ANY OF 


nice ×


Add keywords

Type a word or phrase and press Enter. You can also paste a comma-separated list of words or phrases.

4. Give your rule a descriptive title, and use the checkboxes to apply it to your **Incoming content**, **Own content**, or both based on your preferences. When ready, click **Create Rule** in the bottom right.

Apply to

☒ Incoming content 

☐ Own content 

Name

Alanna assignment



Your rule is now created and it will be applied to your new incoming and/or owned content based on your rule settings.




Note:

If a piece of content would fit the trigger criteria of multiple **Assign to** rules, only the first created rule will be processed. In contrast, multiple **Add labels** rules can be applied to one piece of content.

Copying, editing, or deleting an automation rule

In the Automation rules menu, you can easily copy, edit, or delete an automation rule using the respective icons to the right of a rule.

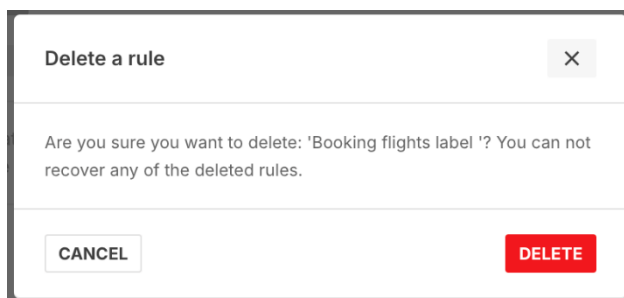
NAME	IF	THEN	APPLY TO	
<input checked="" type="checkbox"/> Alanna assignment	<ul style="list-style-type: none">• is any of "Hollan Vintage Books" channel	<ul style="list-style-type: none">• assign to Alanna	<ul style="list-style-type: none">• incoming content	 
<input type="checkbox"/> Car feedback	<ul style="list-style-type: none">• is any of "comment" content type• contains any of 3 keywords	<ul style="list-style-type: none">• hide content• mark as spam		

 **Edit**
 **Copy**
 **Delete**

When copying a rule, all of the copied rule conditions will be prefilled and the default rule name will indicate "Copy of" the copied rule. Adjust the rule conditions and name as needed, then click **Create Rule** to save your copied rule.

When editing a rule, you can adjust any of the rule conditions and name as needed. Click **Save Changes** to save your rule.

When deleting a rule, you will see a confirmation pop-up message making sure you would like to delete the rule. Click **Delete** to confirm.



Automated messages

Note:

Only Admin users can create automated messages.

With automated messages in Engage, you can choose to share a welcome message when customers reach out, or an away message for when the team is out of the office. You can specify the applicable channels (Facebook, Instagram, Twitter, or WhatsApp) for each message and also the days and times your channels will be considered "away."

Setting up a new message group

To get started setting up automated messages, you will first need to create a group of applicable channels. Please follow the steps below:

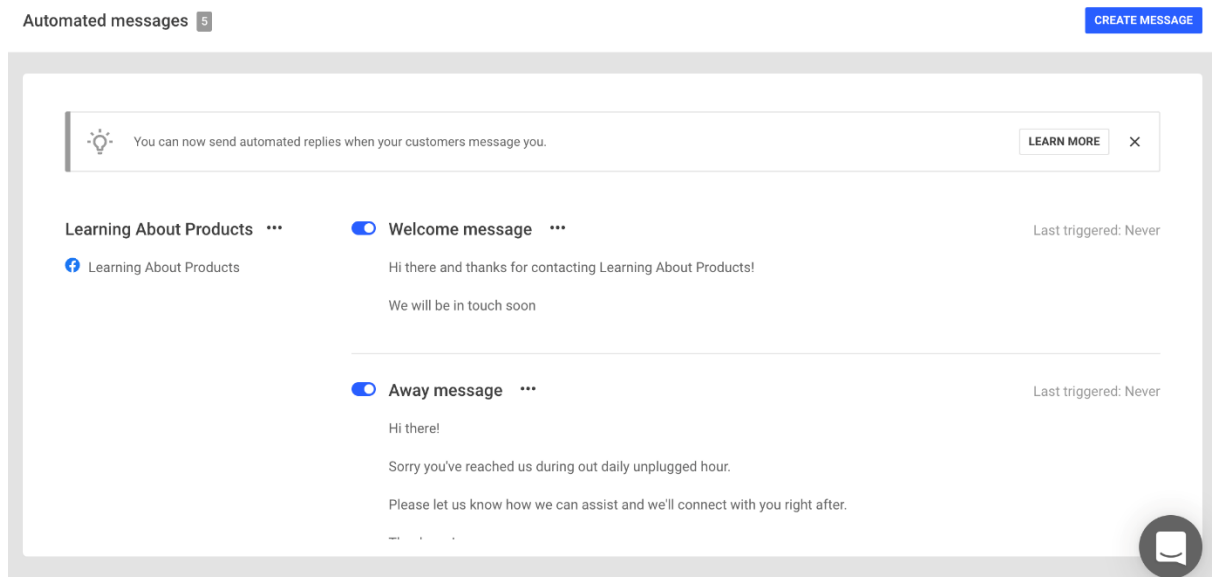
1. In the left-hand sidebar in Engage, select **Automated messages** under Automation.

AUTOMATION

Automation rules

[Automated messages](#)

2. Click **Create Message** in the top right.



3. Provide a name for the automated message group (the group of channels for which you'd like to set up the new automated message).
4. Using the check boxes on the left, select the channel(s) you would like to include in your group.

5. Click **Continue**.

Create new message

CONTINUE

1. Name your automated message group

Nature Friends messages

2. Select channels

Channels (3)

ALL NETWORKS Search for channels... Sort by: NAME - A TO Z

☐ Happy Puppies

☐ Happy Puppies

☐ Happy Puppies

☒ Nature Friends

☒ Nature Friends

☒ Nature Friends

☐ Nature Friends

You will be directed back to the Automated messages menu with your new group visible.

To adjust the channels in your message group, click the '...' beside the message group name, followed by **Edit channels**. Here, you can also delete the message group and any messages by clicking **Delete channels and messages**.

Setting up an away message

1. Once you have [created a new message group](#), beside **Away message**, click **+ Add**.

Alanna's automated message ...

Alanna Brandwatch

Welcome message **+ ADD**

Away message **+ ADD**

2. Select the applicable times and days of the week for your automated message, adjusting the time zone if needed. You can add more times by clicking **+ Add time** or delete a selection by clicking the **trash icon**. Under **Message text**, type

your away message.

How to use

An away message will be sent during the times your channel is set as “away”. Welcome messages will not be sent during these times.

Away hours

Schedule when you want your away message to be sent:

07:00 PM

 –

07:00 AM

MON

TUE

WED

THU

FRI

SAT

SUN

+ ADD TIME

Time zone:

AMERICA/CHICAGO (GMT-06:00) ▼

Message text

Thank you for your message! We are currently away from our standard business hours. We will respond to your message within 48 hours!

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- When finished, click **Continue** in the top right.

You will be directed back to the Messages tab. Click the **Away** message toggle option to activate your away message.

☒ **Away message** ...

Thank you for your message!

Monday

19:00 – 23:59

Setting up a welcome message

- Once you have [created a new message group](#), beside **Welcome message**, click **+ Add**.

Alanna's automated message ...

Alanna Brandwatch

Welcome message

+ ADD

Away message

+ ADD

2. Under **Message text**, enter the message you would like to send (600 character maximum).

How to use

A welcome message will be sent in response to the first private message that someone sends to your channel.

During away hours

If your channel also has an active away message, then the away message will be sent instead of the welcome message.

Message text

Welcome to Brandwatch!

618

3. When finished, click **Continue** in the top right.

You will be directed back to the Messages tab. Click the **Welcome message** toggle option to activate your welcome message.

☒ **Welcome message** ...

Welcome to Brandwatch!

Once enabled, welcome messages will be sent each time a user private messages a channel in your message group. If a welcome message has been enabled and sent out to a new customer private message, **the message will remain unread** until handled in Social Media Management.

If a user in your organization manages to reply to an incoming private message before the welcome message is sent, the welcome message will no longer be sent.

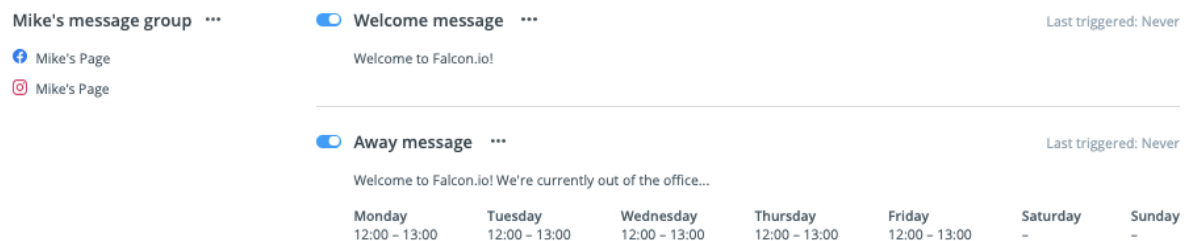
Note:

You can set up both welcome messages and away messages. When both are created and enabled, only one will be sent. During away message hours, the away message will be sent. Outside of away message hours, the welcome message will be sent.

Editing automated messages

Once you have successfully created an automated message, you can choose to temporarily switch it off or edit the times, dates, and the message.

To temporarily switch off an automated message, click the toggle option beside **Welcome message** or **Away message**.



By clicking the '...' beside **Away message** or **Welcome message**, you can choose to edit the message (including the times and dates if applicable) or delete the message.

Note:

If you choose to delete the messages, the automated message group will still be visible, but with no messages.

FAQs

Can I use Engage's automations in combination with another messenger's?

Due to API limitations, Social Media Management cannot sync with any external automated messaging services, including those offered by the networks natively (such as Facebook Messenger's Instant Replies). This means that your customers may receive multiple away or welcome messages if multiple automation tools are running at once. Please choose only one automation tool to remain active at a time.

Will my automated messages mark my incoming messages as read?

Automated messages from Social Media Management **will not** mark incoming messages as read. External automated messages from native platforms **will also not** mark incoming messages as read. For Facebook, please see our article on using a [handover protocol with a bot](#). Please note that the handover protocol is only available for Facebook.

Will automated messages be counted in [Team Performance reports](#)?

Automated messages from Social Media Management **will not** be counted in a Team Performance report. External automated messages from native networks **will also not** be counted in a Team Performance report, with the exception of [Facebook bots](#) since a handover protocol is available. Please see our [Team Performance report FAQs](#) for more information on how Facebook automated messages are counted.

If a customer reaches out for the second time, will another welcome message be sent?

No, welcome messages will only be sent when the customer reaches out for the very first time.

I'm creating a new message group. Why can't I select some of my channels?

While creating a new message group, you cannot select channels which already exist in another message group. This is to avoid multiple welcome/away messages from being sent.