

Managing Influencers

Note:

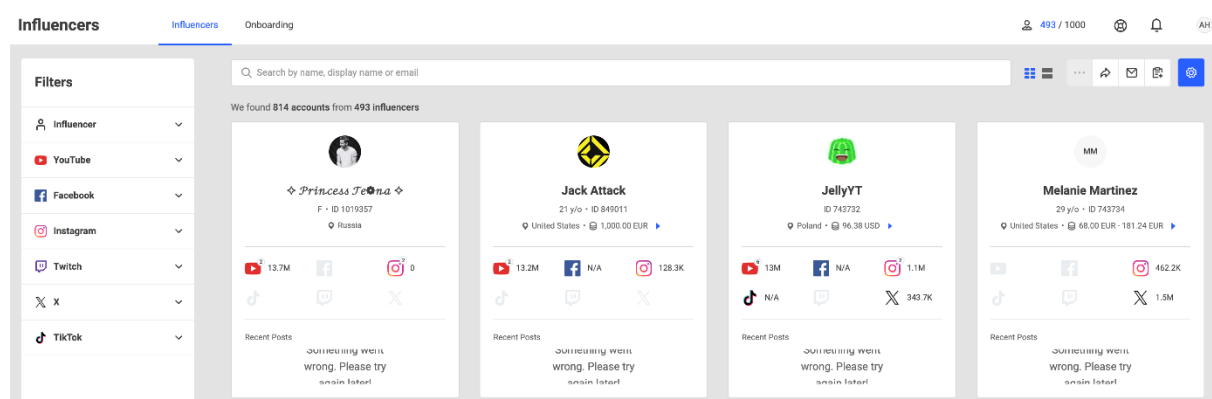
The features described in this article are available to Pro and Premium Influence clients. If you are interested in Influence's full suite, please contact your Customer Success Manager (CSM) for details.

The Influencers CRM has many tools and actions to help you manage your business needs with your influencers. Learn some helpful tips in this article to facilitate your influencer management.

Navigating your influencers roster

When in the Influencers tool, you will see a roster of all of the influencers you have added for your organization and several options to manage them.








On the right-hand side of the tool, you will see a [filters panel](#) to easily filter your roster by several influencer-based and network-based options. At the top of your roster, you will see a search bar to [search your influencers](#) by name, display name, or email. In the top left, you will set a **Select all** checkbox to select influencers in bulk to apply various [bulk actions](#). In the top right, you can view your roster in either Compact View or Detailed View, and use the respective buttons to [share or export your influencers](#), [add a new influencer manually](#), [mass email your influencers](#), or [add documents](#) for your influencers.



Searching your influencers

You can easily search across your influencer roster using the search bar and a variety of filters to quickly find influencers you have added to your Influencers roster. The filter options on the left side of the Influencers tool allow you to search based on the influencer's personal information and platform-level metrics.

Filter options

| Filters | | |
|---|------------|---|
|  | Influencer | ▼ |
|  | YouTube | ▼ |
|  | Facebook | ▼ |
|  | Instagram | ▼ |
|  | Twitch | ▼ |
|  | X | ▼ |
|  | TikTok | ▼ |

Under the **Filters** sidebar, the Influencer drop-down filters allow you to search for overall influencer information like location, age, rates, talent managers, etc. The platform-level filters allow you to search for platform-specific metrics like followers, engagements, impressions, audience demographics, and more. The following tables describe the specific filter options for each section of filters.

Influencer filters

| Filter | Description |
|----------------|--|
| Tags | Filters by tags added to the influencer's profile. |
| Country | Select one or more countries to filter by. |
| Age | Filter by a specific age range. |
| Gender | Select between Male, Female, or Other. |
| Cost per post | Minimum to maximum cost per post, for any platform or post type, payable to the influencer. Filter by a specific currency. |
| Group | Filters by the designated influencer group. |
| Talent manager | Filters by the assigned talent manager. |

| | |
|-------------|---|
| Auth status | Filters by a designated auth status on at least one of the influencer’s accounts (e.g. Authorized, To Reauthorize, Not Authorized). |
|-------------|---|

Note:

Any custom fields also set up by your organization to include in the influencer’s profile will appear as filter options under the Influencer filters dropdown.

YouTube filters

| Filter | Description |
|---------------------------|--|
| YouTube CMS status | Filters by YouTube CMS status. |
| Audience geography | Select one or more countries to filter by. |
| Audience age range | Select one or more age ranges to filter by. |
| Audience gender | Filter by Male, Female, or Other. |
| Subscribers | Filters by a subscribers range. |
| Avg. views — Latest video | Filters by a range of the average number of views on the account’s latest videos. Based on views from videos published in the last 365 days that are at least two days old. |
| Auth status | Filters by the authentication status of the influencer’s YouTube channel (e.g. Authorized, to Reauthorize, Not Authorized). |
| Last publishing date | Filters by influencers who have published a video within the selected time period. Select from either any time period, 1 month, 3 months, or 6 months. If the influencer has multiple YouTube channels, their last publishing date will be based on the most recent video posted on any of the connected channels. |

Facebook filters

| Filter | Description |
|---------------------------|---|
| Audience geography | Select one or more countries to filter by. |
| Audience age range | Select one or more age ranges to filter by. |
| Audience gender | Filter by Male, Female, or Other. |
| Followers | Filters by a range of page followers. |
| Avg. views — Latest video | Filters by a range of the average number of views on the account's latest videos. Based on views from videos published in the last 365 days that are at least two days old. |
| Avg. impressions/new post | Filters by a range of the average number of impressions per new post. |
| Avg. reach/new post | Filters by a range of the average reach per new post. |
| Auth status | Filters by the authentication status of the influencer's Facebook Page (e.g. Authorized, to Reauthorize, Not Authorized). |

Instagram filters

| Filter | Description |
|---------------------------|---|
| Audience geography | Select one or more countries to filter by. |
| Audience age range | Select one or more age ranges to filter by. |
| Audience gender | Filter by Male, Female, or Other. |
| Followers | Filters by a range of page followers. |
| Avg. views — Latest video | Filters by a range of the average number of views on the account's latest videos. Based on views from videos published in the last 365 days that are at least two days old. |
| Avg. impressions/new post | Filters by a range of the average number of impressions per new post. |

| | |
|----------------------------|---|
| Avg. reach/new post | Filters by a range of the average reach per new post. |
| Avg. impressions/new story | Filters by a range of the average number of impressions per new story. |
| Avg. reach/new story | Filters by a range of the average reach per new story. |
| Auth status | Filters by the authentication status of the influencer's Instagram account (e.g. Authorized, to Reauthorize, Not Authorized). |

Twitch filters

| Filter | Description |
|---------------------------|---|
| Followers | Filters by a range of page followers. |
| Avg. views — Latest video | Filters by a range of the average number of views on the account's latest videos. Based on views from videos published in the last 365 days that are at least two days old. |
| Avg. views/new stream | Filters by a range of the average number of views on the account's latest stream. |
| Games played | Select one or more games to filter by. |
| Streamer language | Select one or more languages to filter by. |
| Auth status | Filters by the authentication status of the influencer's Twitch account (e.g. Authorized, to Reauthorize, Not Authorized). |

X (Twitter) filters

| Filter | Description |
|---------------------------|---|
| Followers | Filters by a range of page followers. |
| Avg. views — Latest video | Filters by a range of the average number of views on the account's latest videos. Based on views from |

videos published in the last 365 days that are at least two days old.

Avg. impressions/new post

Filters by a range of the average number of impressions per new post.

Auth status

Filters by the authentication status of the influencer's X (Twitter) account (e.g. Authorized, To Reauthorize, Not Authorized).

TikTok filters

Filter

Description

Followers

Filters by a range of page followers.

Avg. views — latest video

Filters by a range of the average number of views on the account's latest videos. Based on views from videos published in the last 365 days that are at least two days old.

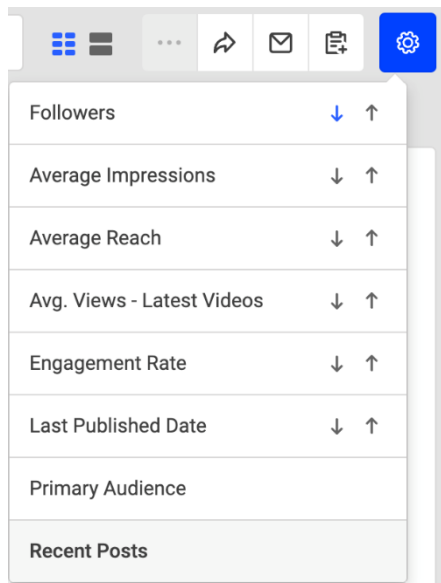
Authentication status

Authentication status of an influencer's TikTok account (Authorized, To Reauthorize, Not Authorized).

Sort options

Use the **gear icon** in the top-right corner of the Influencers tab to sort for influencers based on different metrics and even customize influencer cards based on desired performance metrics you'd like to review. For example, you can sort your influencers by most or least followers and the system will then display follower accounts on each

influencer card so you can quickly scan the information you're looking for.



Search bar options

If you want to find a specific influencer in your dashboard, you can use the search bar at the top of the Influencers tab.

The fields you can use to search for an influencer are:

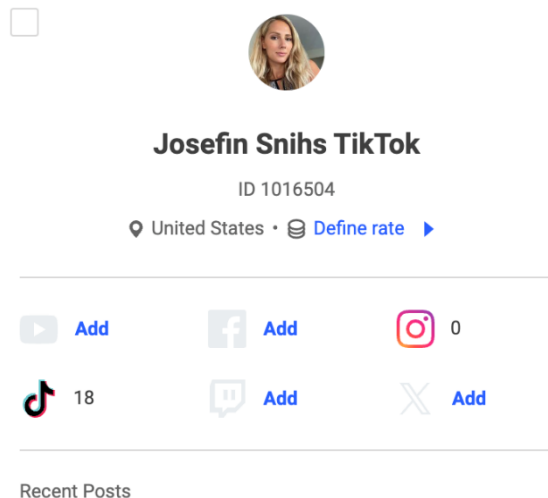
- Influencer name
- Influencer email, Paypal email
- Account ID (such as YouTube channel ID)
- Influencer ID (listed below the creator's name in the table)
- Tipalti ID
- Social media network page ID, page name

Editing or viewing an influencer's profile

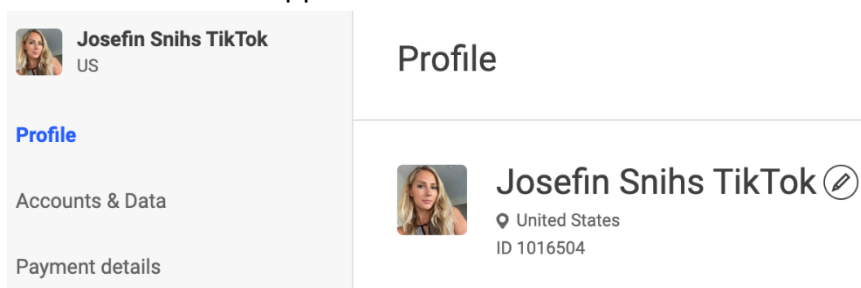
To edit influencers' information, your user account will need to have the Edit Influencers permission enabled by an administrator.

If you have permission to edit an influencer's profile, first click on their card on the Influencers tab.

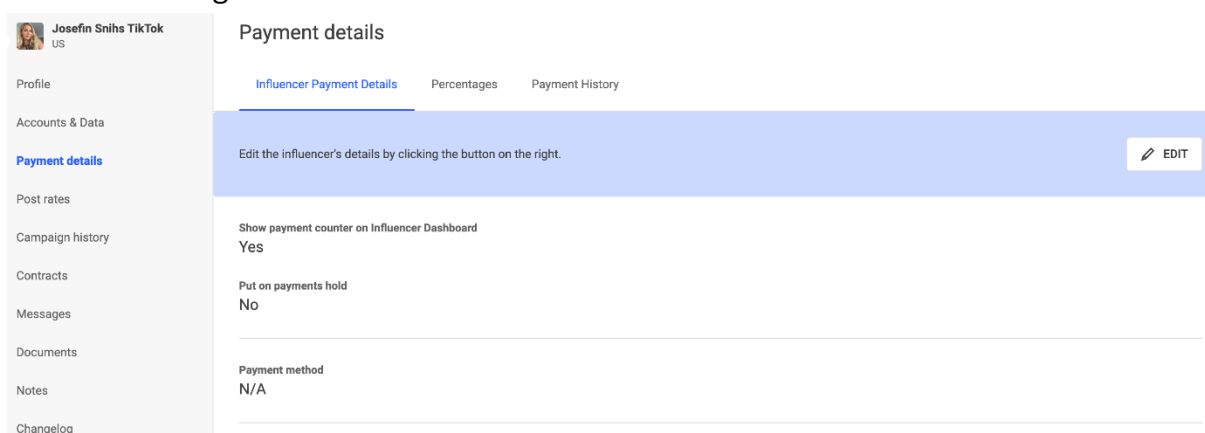
Their profile will open, and you'll be able to see a **pencil icon** appear when you hover your mouse over any of the influencer's information.



To edit that piece of information, click on the **pencil icon**. The field will then become editable. To save your changes, use the **Enter key** on your keyboard or click the **OK** button that appears in edit mode.



Certain sections of the influencer's profile, such as the Payment Details tab, have an edit button at the top of the tab that will make all the fields editable when clicked. In this case, make sure you click the **Save** button that appears at the top of the tab once you are done editing.



Influencer profile sections

Profile

Includes the influencer's name, profile picture, and influencer ID. Additional fields may include full name, birthday, gender, currency, email, phone number, Skype name, username, influencer dashboard language, country, state/province, city, postal code, street address, their assigned talent manager and group, and any custom fields included by your organization.

Accounts and data

Lists any accounts connected for the influencer. Clicking into an account gives you Overview metrics, a Posts feed, and Insights charts for the account. You can adjust an account's [application state](#) within the Overview section.

Tip:

Estimated insights, including the influencer's account, audience, and post insights, will be available for any non-authorized accounts. For more information on what insights are available for influencers, please visit our [Influencer Metrics](#) article.

Payment details

Includes payment detail settings such as adding the payment counter on an influencer's dashboard, putting payments on hold, setting a payment method (e.g. PayPal, check, ACH, or wire transfer), any filling out custom payment fields set by your organization. Also allows you to set revenue shares for your influencer's YouTube channel and displays a payment history for your influencer.

Post rates

Allows you to add post rates for each social platform. Adding a post rate allows you to specify the talent rate and client rate for the post type and media type.

Campaign history

Shows a history of all of the campaigns associated with the influencer.

Contracts

Displays campaign contracts and account contracts for the influencer. You can send the influencer a new account contract or a renewal contract by clicking the **Add New Contract** button. You can select the influencer's social accounts you would like to add a new contract for, and then add a new template contract or custom contract. You can also upload an already-signed contract under the custom contract option if it was signed outside the system.

If you select a new template contract, or upload a custom contract and select **Send for signature**, the influencer will receive an email with the contract when you click **Save** and they will also be presented with the signature page the next time they log in.

Messages

Shows a log of all messages and campaign messages sent to the influencer.

Documents

Shows the documents that have been uploaded to the influencer's profile.

Note:

Documents can be uploaded via the Add Documents button on the Influencers tab. See the section below on [Uploading Documents](#) for an Influencer to learn more.

Notes

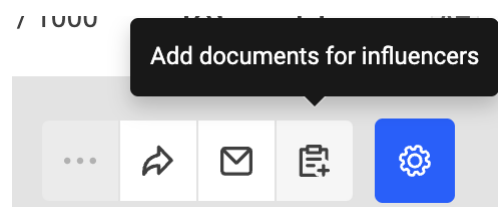
Allows you to and other admins in your organization to add notes to the influencer's profile. See the section below on [Admin Tagging in Notes](#) to learn more.

Changelog

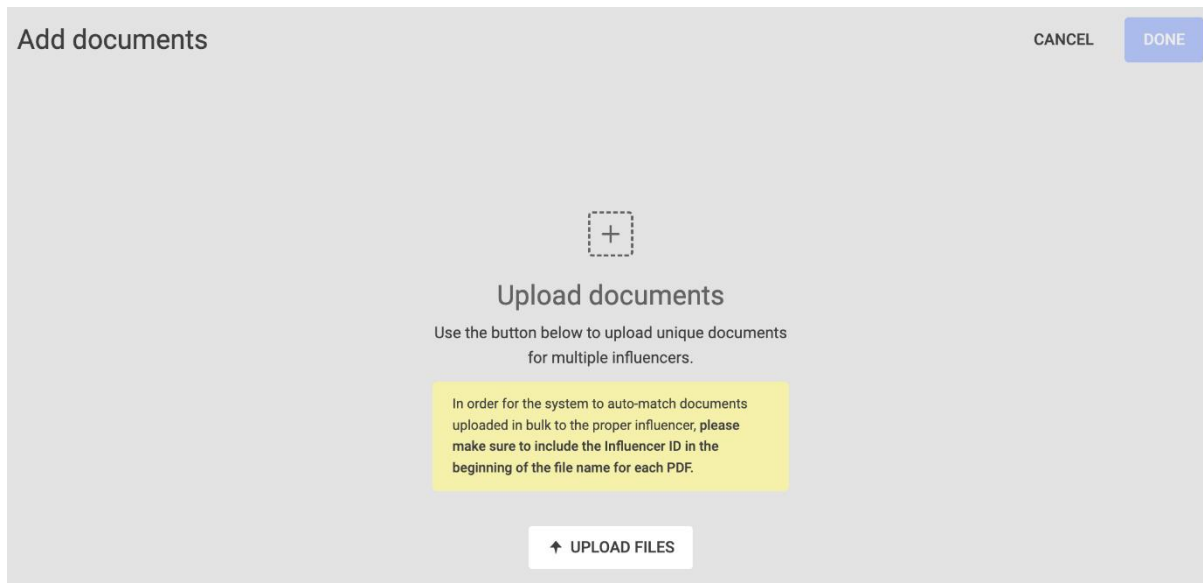
Shows a log of all updates to the influencer's account from the past 90 days.

Uploading documents for influencers

If you are looking to upload documents such as tax forms or contracts for your influencers, you can do so via the Influencer tab by clicking on the **clipboard icon** in the top-right of the screen.



The following window will allow you to upload a PDF document.



Note:

You must add the influencer ID number in the beginning of the file name in order to add this document to the correct influencer. You can find the influencer's ID on their influencer card, or in their influencer profile. Once you have uploaded the document, it will have you confirm that you matched up with the correct influencer or show any errors that may have come up.

Once you click **Done**, this document will now always be saved within the influencer's profile, under Documents.

Tagging admins in notes

If you want to notify other team members from an influencer's profile, you can tag admins in your notes that you leave in the influencer profile's Notes section. For example, this is helpful if you want to remind them to do something for the influencer, read something important related to the influencer, or ask them a question.

To tag an admin in a note, navigate to the Notes section in an influencer's profile. Type your note in the text field and use the **@ key** on your keyboard to tag another admin that has access to the influencer. The system will find the admins available to tag based on what you type after the @ key.

The admin that has been tagged in the note will see a new unread notification on their dashboard next time they log in.

Adding tags to influencers

Tags are custom keywords that you can add to an influencer's profile to make it easier to categorize and search for an influencer within your roster. For example, your team might use tags to label influencers by a topic, what brands they like or dislike, etc.

You can add tags to an influencer within their profile. To add a tag, open the influencer's profile and look for the **Tags** text box at the bottom of the Profile section. Then, simply type the tag you would like to add in the text box and press the **Enter key**. You will see the tag populate in the Tags section, and you can click the **X icon** next to a tag to remove it. There is no limit on the number of tags that you can add to an influencer.

TAGS

extra ×

bulk action ×

U.S. ×

any ×

Once you add a tag to an influencer, you'll be able to apply the tag as a search filter when searching your influencers roster. You can search for multiple tags at the same time by pressing the **Enter key** after you type each tag, or checking the checkbox next to a tag when it comes up as a filter. If multiple tags are applied, the search will act as an AND function to find influencers that have all of the tags you searched for.

Tags (Separate tags by comma) ?

Deleting influencers

If you no longer need an influencer and want to delete them from your roster, search for the influencer in your roster and click on their card to open their profile. Scroll down to the bottom of the Profile tab (under the Tags box), and click **Delete Influencer**.

TAGS

extra ×

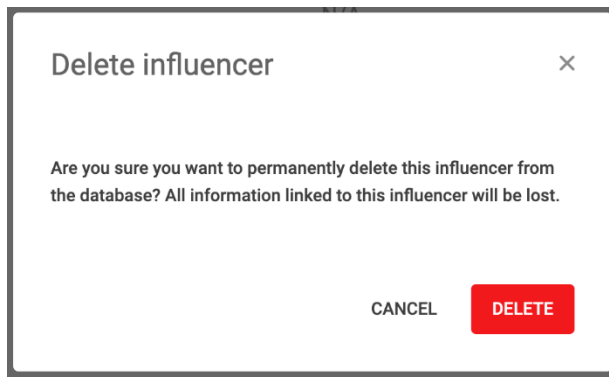
bulk action ×

U.S. ×

any ×

DELETE INFLUENCER

A pop-up window will appear to confirm that you want to delete the influencer. Click **Delete** to confirm.



Sharing and exporting influencer profiles

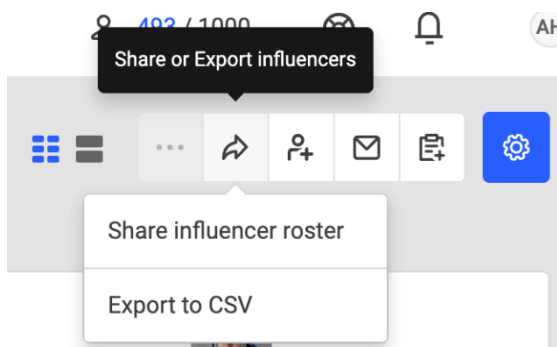
You can easily share your influencers profiles with clients and partners outside of Influence using several sharing and export methods.

Sharing your full influencer roster

You can share a live link of your full influencer roster with clients or partners using the **Share or Export** option in the Influencers tab. In the Influencers tab, click on the **Share or Export Influencers (arrow) icon** in the upper right, and choose **Share influencer roster**.

Tip:

If you would like to share select influencers instead of your entire roster, you can use the [filter options](#) on the left-hand side of the Influencers tool to pre-filter your influencers list or select multiple influencers by clicking the checkboxes on their influencer cards' before clicking **Share or Export Influencers > Share influencer roster**.



The following window will let you customize the roster live link such as the client name, logos and colors, link password and expiration date. You can also choose to show or hide certain information. Once you have finished customizing your link, scroll to the bottom of the window and click **Copy Link** to share it with clients and partners outside of Influence.

Share influencer roster

Please select the look & feel.

[New share](#)

Existing links (47)

Archived links (7)

Client Name *

Customize look & feel

Client logo

↑ UPLOAD LOGO

You can only use transparent PNGs.
Minimum resolution is 200x200px.
Remove white space around the logo.

Top bar background



#FFFFFF

Clear

Set a password for the shared link

Require a password?

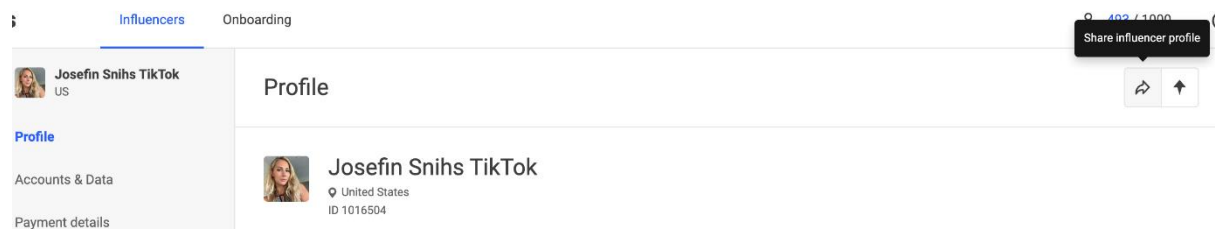


Share link expiration date

Choose date

Sharing an individual influencer profile

To share a live link of an individual influencer profile, search for your influencer in the Influencers tab and click into their profile. In the influencer's profile, click the **Share influencer profile (arrow) icon** in the upper right.



As with sharing your full roster, the following window will let you customize the live link such as the client name, logos and colors, link password and expiration date. You can also choose to show or hide certain information. Once you have finished customizing your link, scroll to the bottom of the window and click **Copy Link** to share it with clients

and partners outside of Influence.

Share influencer

Please select the look & feel and which accounts you want to include in the shared link.

[New share](#) Existing links (0) Archived links (0)

Client Name *

Client Name

Customize look & feel

Client logo

↑ UPLOAD LOGO


You can only use transparent PNGs.
Minimum resolution is 200x200px.
Remove white space around the logo.

Top bar background

#FFFFFF

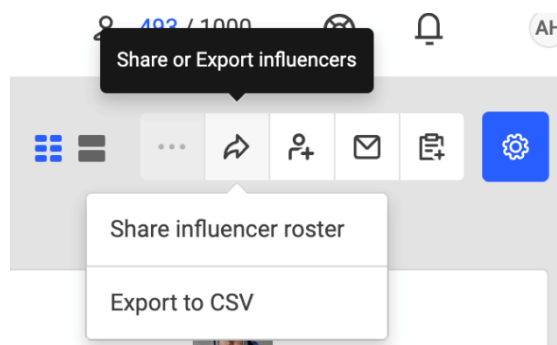
Clear

Select accounts

| | | |
|---|--------------------------|-------------------------------------|
|  | @jsnihs | <input checked="" type="checkbox"/> |
|  | Josefin Snihs @jsnihs | <input checked="" type="checkbox"/> |

Exporting your influencer roster as a CSV

If you would like to export your roster of influencers to a CSV file, you can do so by clicking the **Share or Export Influencers (arrow) icon** at the top of the Influencers tab, when selecting **Export to CSV**.



In the export window, you can select which columns to include in the CSV file before exporting.

Export 21 Influencers to CSV

Please select which columns to include in the CSV. The CSV file will be emailed to alanna.hollyway@brandwatch.com

☒ Select all

☒ Influencer information ⓘ

☒ Account Authorization Link

☒ Age

☒ Birthdate

☒ Country

☒ Currency

☒ Custom Fields

☒ Dashboard Language

☒ Description

☒ Email Address

☒ First Name

☒ Group

☒ Influencer ID

☒ Last Name

☒ Mailing Address

☒ Payment Details

☒ Phone Number

☒ Post Rate Range

☒ Tags

☒ Talent Manager

☒ YouTube ⓘ

☒ Account Contract Details

☒ Account ID

☒ Account Name

☒ Account URL

☒ Application State

☒ Authentication Status

☒ Average Views - Latest Videos

☒ Engagement Rate

☒ Followers

☒ Last 30 Days Views

☒ Revenue Shares

☒ Top Audience Age

☒ Top Audience Gender

☒ Top Audience Geography

☒ Total Posts

Exporting individual influencer profiles as PDF, Powerpoint, or Google Slides

In addition to the live link, you can export and share individual influencer profiles as PDF, Powerpoint, or Google Slides. To export these report types, click the **Export Influencer icon** in the upper right of the influencer's profile.

The screenshot shows the Brandwatch interface for an influencer profile. At the top, there are tabs for 'rs', 'Influencers', and 'Onboarding'. On the right, there is a user icon, a follower count of 493 / 1000, and an 'Export influencer' button. The main profile section shows the name 'Josefin Snihs TikTok', the location 'United States', and the ID '1016504'. The sidebar on the left has a 'Profile' tab selected, with other options like 'Accounts & Data' and 'Payment details'.

The following window will let you customize the export before downloading. Once customized, you can select your export format at the bottom of the window and

download the file to your computer.

Export Influencer

Please select the look & feel and which accounts you want to include in the export.

Customize look & feel

Client logo

↑ UPLOAD LOGO

You can only use transparent PNGs.
Minimum resolution is 200x200px.
Remove white space around the logo.

Top bar background

#915c5c

Clear

Select accounts

| | | |
|---|--------------------------|-------------------------------------|
|  | @jsnihs @jsnihs | <input checked="" type="checkbox"/> |
|  | Josefin Snihs @jsnihs | <input checked="" type="checkbox"/> |

Bulk actions for managing influencers


Bulk actions in the Influencers tab help you update multiple influencers at once with tags, groups, and more.

In the Influencers tab, first select the desired influencer profiles by clicking the checkbox in the upper left of their profile card. You can select multiple influencers or your entire roster using the **Select all** checkbox to the left of the Influencers search bar.

☒ Select all

Search by name, display name or email




☒ Selected 493 influencers




☒

❖ Princess Teona ❖

F • ID 1019357


📍 Russia • 🗨 Define rate ▶

 13.7M  Add  0

 Add  Add  Add

Recent Posts




No Posts




☒

Jack Attack

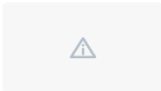


21 y/o • ID 849011

📍 United States • 💰 1,000.00 EUR ▶

 13.2M  N/A  128.3K

 Add  Add  Add

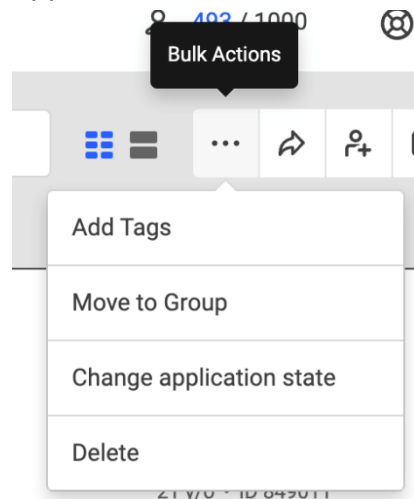
Recent Posts

   >

Tip:

Use the filters in the left-hand sidebar to first search for the influencers you'd like to update, and then use the Select all checkbox to quickly select this group.

After you have selected your desired influencers, click on the ... **(three dots) icon** in upper left and then select the bulk action you'd like to take.



- **Add Tags:** This action allows you to add new or existing tag(s) to the selected influencers.
- **Move to Group:** This action allows you to move the selected influencers into another group.
- **Change Application State:** This action allows you to bulk update the selected influencers' social accounts into another application/onboarding state. For example, you could bulk update the application state on influencers you no longer work with from Completed to Removed.

Note:

This action can only be performed on social accounts that are currently in the Completed state.

- **Delete:** This action allows you to delete the selected influencers from your Influencers roster.