

Hello!

In this article, we will discuss how to share Reports pages with your colleagues. We refer to this as creating Shares, or our Sharing capability. We will cover the following in this article:

- The Basics
- Creating a Share
- Scheduling your Share
- Filtering Options
- Managing your Share

***Important to note** – As of July 2nd, the Sharing capability, which was available as a beta version, has been rebuilt and improved to offer you a smoother experience.

Here is what's changed:

- **Warning:** The filter bar available in Sharing prevail on the other filters you may have used when building your Reports pages. If you choose to use it, it will override your previously set filters

Share via email - Beta

Period Topics Publisher categories Query Clear

⚠ If you previously set filters on your widgets, they will be overridden by these filters.

Pick content to send

Select one page*

Select

The attached file is currently in PDF

Customize your message

Email subject*

Subject

Text

Give context for your recipients

When would you like to send?

Your next automated email will be delivered:

every Mon at 09:00

Who are your recipients?

Add one or multiple recipients (separated by a comma or a new line)*

julie@synthesio.com, john@synthesio.com

Add

List of added recipients

Clear all

- **From a single page to multi-page:** The format of the PDF reports that are sent via email has been updated. It used to send a 1-pager PDF, whatever the number of widgets available on the Reports page. From now on, the PDF document will be split into a multi-page doc for more comfort and readability

[-See the Old Share PDF Doc](#)

[-See the new Share PDF Doc](#)

Please note that this is still a beta version, and many improvements are yet to come. This page will be updated along with those changes.

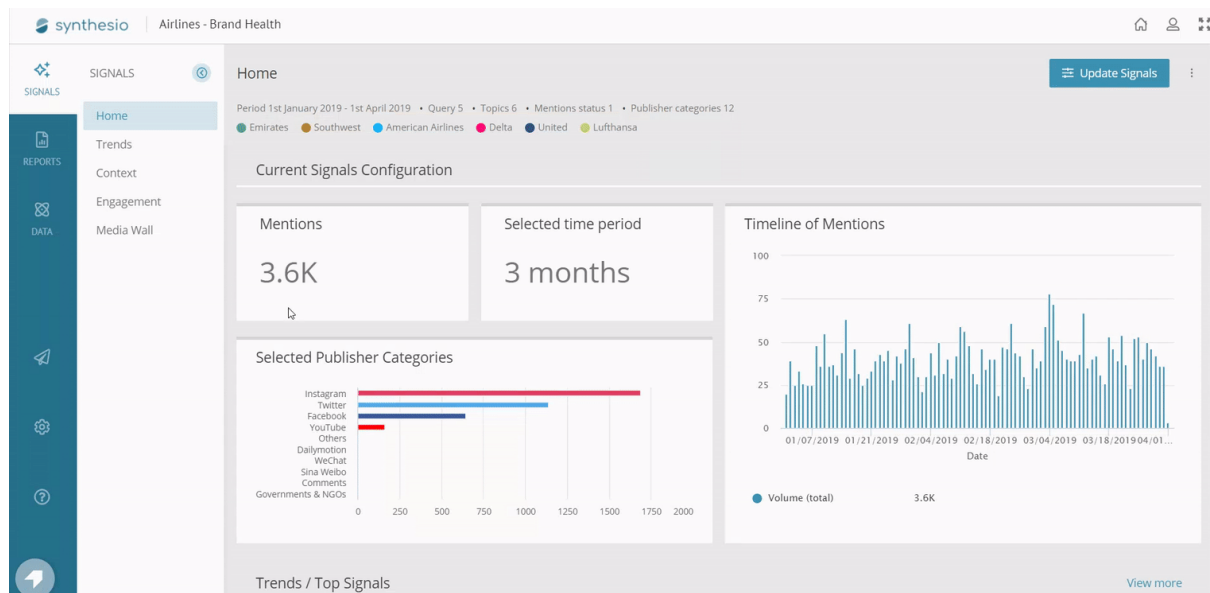
The Basics

Our Sharing capability allows you to share Reports pages via email, either on a one-off or recurring basis. In the future, we will support the sharing of Signals.

In the ideal, business professionals like you use Synthesio to make data-backed decisions that align with consumer preferences. Of course, decision-making is typically a group effort. Thus, *our Sharing capabilities help you establish data-backed and consumer-centric thinking across your teams by ensuring that social insights are current, understandable and at the forefront of your colleagues' minds.*

Creating a Share

Creating a Share is quite simple. As you'll see below, the first step is to click the 'paper airplane icon' on the left sidebar. From there, click 'Create'.



Select your Reports page and customize your message

The next step is to select the Reports page you would like to send. You'll then see the option to title your email and create a custom message to your recipients.

The screenshot shows the 'Share via email - Beta' interface. At the top, there's a header with the Synthesio logo and 'Airlines - Brand Health'. Below the header, there's a navigation bar with 'SIGNALS', 'REPORTS', and 'DATA'. The main content area is divided into three sections: 'Pick content to send', 'Customize your message', and 'When would you like to send?'. The 'Pick content to send' section has a dropdown menu labeled 'Select one page*' with 'Select' as the current selection. Below it, a note states 'The attached file is currently in PDF'. The 'Customize your message' section has a text input for 'Email subject*' with 'Subject' as the placeholder, and another text input for 'Text' with 'Give context for your recipients' as the placeholder. The 'When would you like to send?' section has a text input for 'Your next automated email will be delivered:' with 'every Mon at 09:00' as the placeholder. Below this, there's a section 'Who are your recipients?' with a text input for 'Add one or multiple recipients (separated by a comma or a new line)*' containing 'julia@synthesio.com, john@synthesio.com'. There's an 'Add' button next to the input. At the bottom right, there are 'Close' and 'Create' buttons.

Scheduling your Share

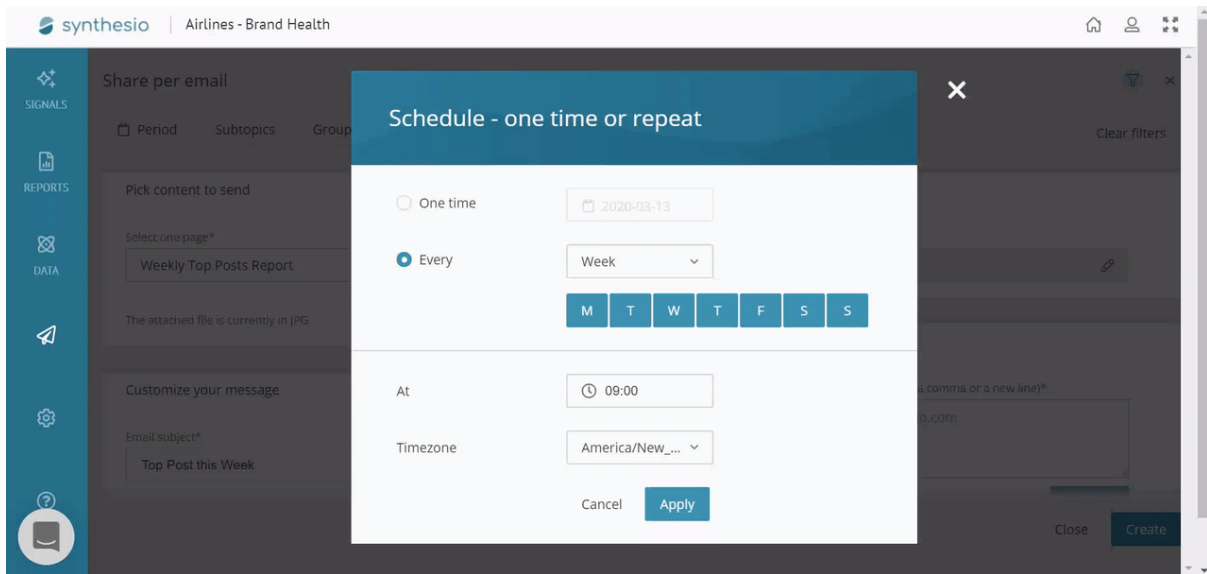
Once you've picked your page and written your message, the next step is to schedule your Share. Let's explain the scheduling options:

- You can schedule your Share to deliver on a one-time or recurring basis. In our tool, you'll see this represented with the 'One Time' and 'Every' options. By selecting 'Every', you are choosing to send the Reports page on a pre-defined schedule.
- For the 'Every' option, you can schedule your Shares on a weekly basis or monthly basis. As an example, you can send your Reports page once a week on Mondays and Wednesdays. For monthly shares, you can select to send your Reports page on the 1st, 2nd, 3rd or 4th Monday, Tuesday, Wednesday, etc.

- You can choose to send your Reports page everyday by selecting the Weekly option and clicking each day of the week (as shown below)

When selecting the precise time of day

The last step when scheduling your Share is to select the precise time of day. The 'At' field requires you to pick a precise hour and minute. The clock works off of a 24-hour format. So, as an example, 9:00 PM is 21:00. From there, you can select from various time zones.



Adding Recipients

This one is simple as well. Enter in the email addresses of your recipients.

Who are your recipients?

Add one or multiple recipients (separated by a comma or a new line)*

john@synthesio.com

+ Add

List of added recipients

rhansen@synthesio.com x

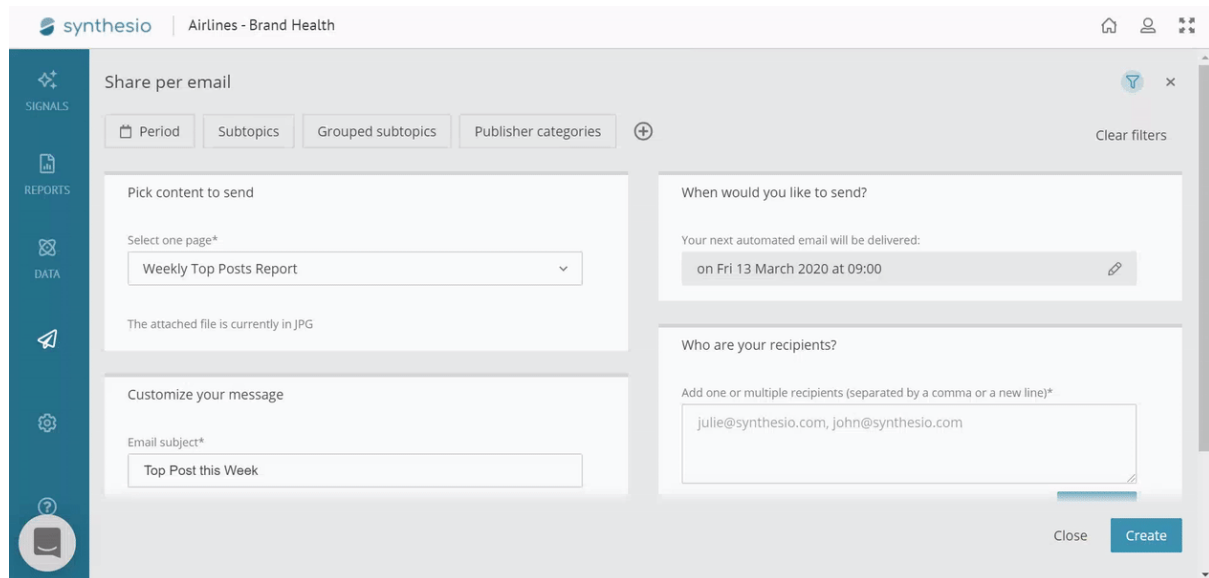
rguillemot@synthesio.com x

Clear all

Close Create

Filtering Options

Before sending your Share, you have the option to select from any number of filters. As you will see atop your screen, but depending on your dashboard structure, you can quickly select from your time 'Period', 'Topics' and 'Publisher Categories'. You also have the option to search for additional filtering options. In the example, we are choosing to look at Top Posts for Facebook, Instagram and Twitter.

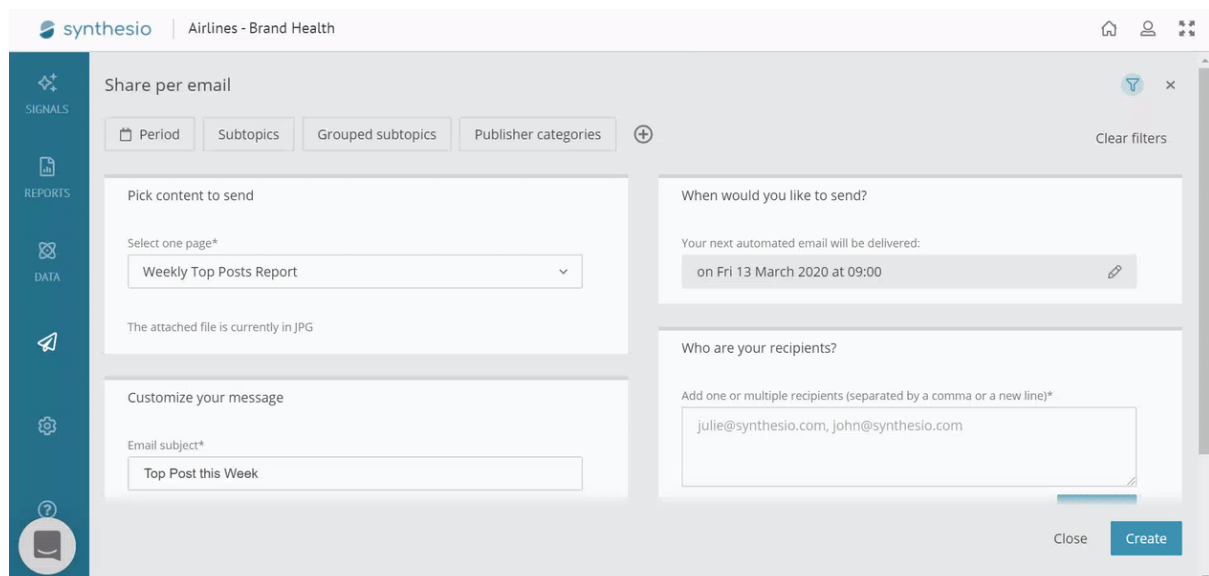


The screenshot shows the 'Share per email' interface in the Synthesio 'Airlines - Brand Health' dashboard. The interface is divided into several sections: a top filter bar with 'Period', 'Subtopics', 'Grouped subtopics', and 'Publisher categories' tabs; a 'Pick content to send' section with a dropdown menu set to 'Weekly Top Posts Report'; a 'Customize your message' section with an 'Email subject*' field containing 'Top Post this Week'; a 'When would you like to send?' section with a date/time picker set to 'on Fri 13 March 2020 at 09:00'; and a 'Who are your recipients?' section with a text area containing 'julie@synthesio.com, john@synthesio.com'. A 'Create' button is visible at the bottom right.

Once you are ready, the final step is to click 'Create'.

Managing Your Shares

Once you've created a Share - or multiple Shares - you'll then have the ability to manage and edit them. As the below GIF details, you can delete your Shares or edit information, like adding new recipients or applying new filtering options.



This is a duplicate of the screenshot above, showing the 'Share per email' interface in the Synthesio 'Airlines - Brand Health' dashboard. It displays the same filter tabs, content selection, message customization, scheduling, and recipient list, with the 'Create' button at the bottom right.

Ok, that's it for now! Stay tuned for future updates to the Sharing experience.

Good luck!

The Synthesio Team