[← Back to home](#)

FinText™ Platform: Dashboard Reporting Overview


How to use Dashboard Reporting and its features in the User Interface

SBT's Dashboard Reporting provides data visualization and insights for decision making, performance monitoring, and achieving strategic objectives all within a user-friendly interface.

SBT aggregates data for Dashboard Reporting daily at approximately 1 a.m. Central Time. The time and date showing the last data refresh is shown at the bottom right of the Dashboard Reporting page.

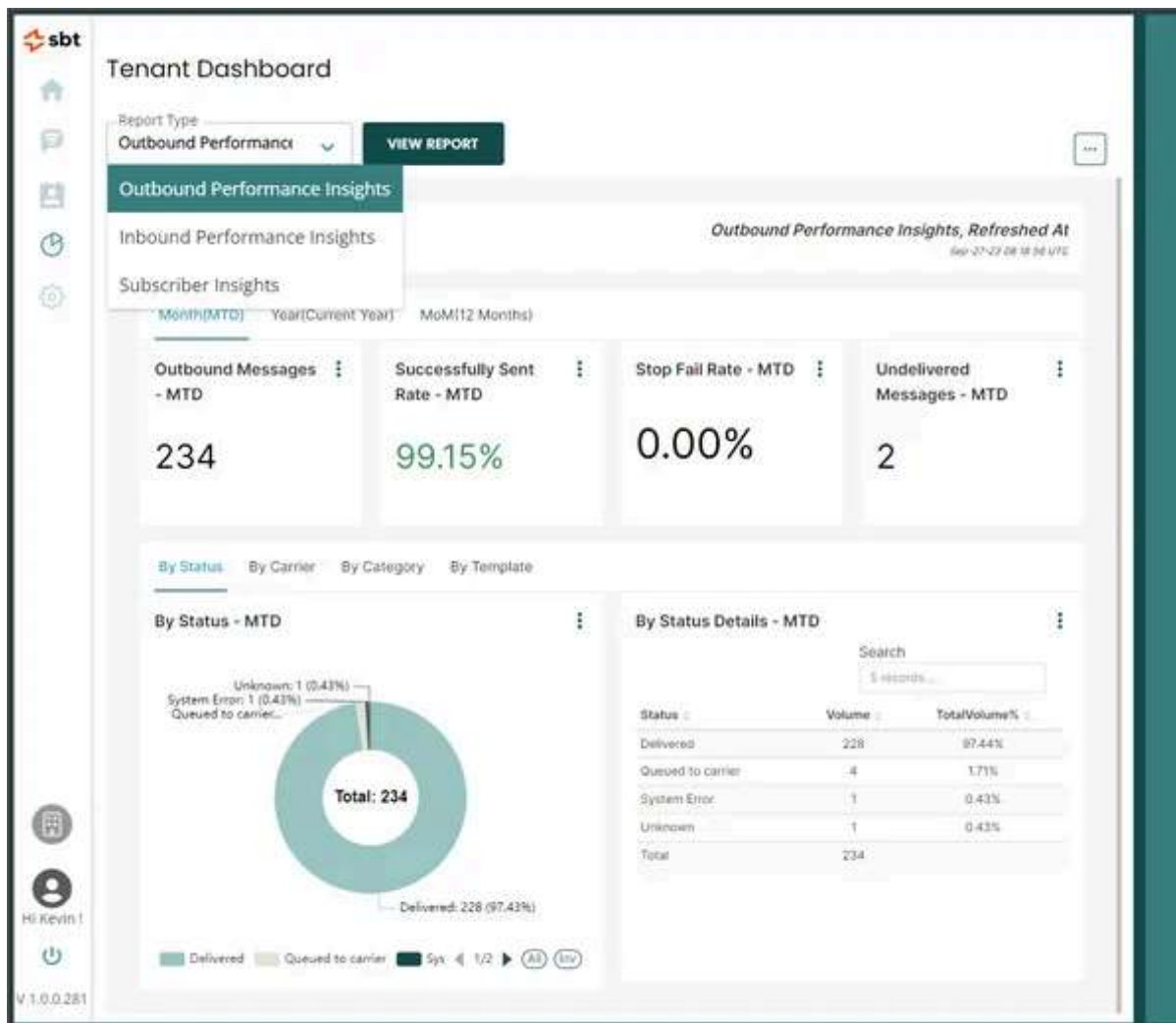
Data reporting may experience delays. Dashboards will display a date and time stamp for the available data.

Dashboards are available at the Account and Brand levels:

- Account-level Dashboards are available when logged in as an Account Admin. If you click the Brand icon , you will only see a Dashboard for that Brand.
- Brand-level Dashboards are available when logged in as a Brand Admin.

Click the Dashboard icon  in the left menu to open the Dashboard screen.

Dashboards



The following Dashboards are available (click the links for KB articles on each):

- [Outbound Performance Insights](#): The total number of outbound messages, number of messages successfully delivered, stop-fail rate, and undelivered messages.
- [Inbound Performance Insights](#): The total number of inbound messages, number of keyword messages, number of two-way messages, and number of STOP messages.
- [Subscriber Insights](#): The total number of subscribers for the Account or selected Brand/Group, opt-ins, opt-outs, and opt-out rate.
- [Templates Performance Insights](#): The total number of templated messages sent, segments used by templated messages, templates in use, and the opt-out rate of responses to templated messages.

Users may select from three activity periods, with different displays:

- **Month-to-Date (MTD)**: Activity since the beginning of the current month. Displays as a four-panel statistical view above, with a donut chart on the lower left and a data table on the lower

right.


- Year (Current Year): Activity since the beginning of the calendar year. Displays as a four-panel statistical view above, with a donut chart on the lower left and a data table on the lower right.
- Month-over-Month (MoM): Activity for the last rolling 12 months (if available). Displays as a bar or combined bar-and-line chart for both the upper and lower display areas.

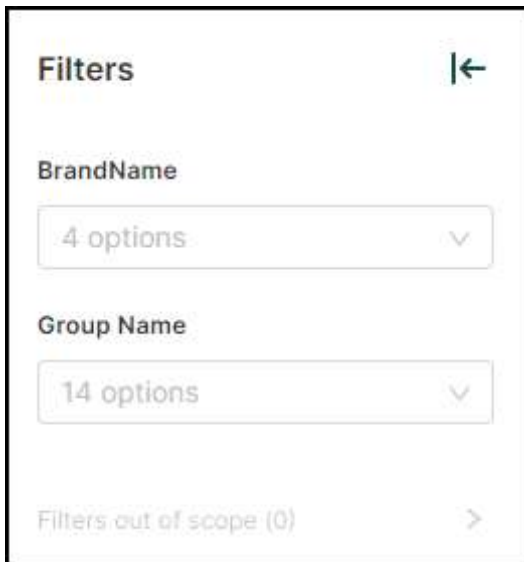
Select a Report Type from the menu and click the VIEW REPORT button.

The three-dot ellipsis button  on the upper right has three functions:

- Refresh Dashboard: Gets the latest data for the Chart or Data Table and shows when the data were last refreshed.
- Download: Allows downloading of a .CSV or PDF image file of the Chart or Data Table information:
 - CSV files will contain the data used to generate the Chart or Data Table.
 - Selecting “Download as image” will result in a PDF image file containing an image of the Chart or Data Table. Charts will include a legend.
- Set auto-refresh interval: Change the frequency of automatic refreshes from 10 seconds to 24 hours. The default is *Don't refresh*. Intervals are set for the current session only; the interval does not carry over to future sessions.

Filtering

The Dashboard report initially shows data for an Account; the data may be filtered to a Brand or Group. Click the Filter icon  for the Filters panel:



Filters

BrandName

4 options

Group Name

14 options

Filters out of scope (0)



Choose the Brands and/or Groups you want to include in the Report. **Note:** When logged in as a Brand Admin, only Group filtering is available.

Any Brand or Group which has been deleted will appear in the list as DELETED_BRAND or DELETED_GROUP.

Click the APPLY FILTERS button at the bottom of the Filters panel to see the report. To reset the filters, click CLEAR ALL.

To close the Filters panel, click the Contract icon .

Charts and Data Tables

Each Dashboard displays multiple charts and data tables. The charts and data tables can be filtered, and they may be downloaded.

Outbound Messages
- Year

3.66k

Successfully Sent
Rate - Year

98.85%

Stop Fail Rate - Year

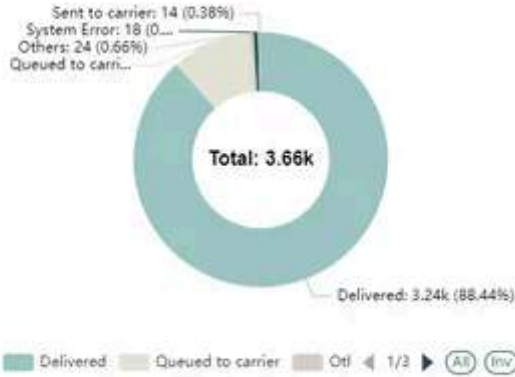
0.19%

Undelivered
Messages - Year

42

By Status By Carrier By Category By Template

By Status - Year

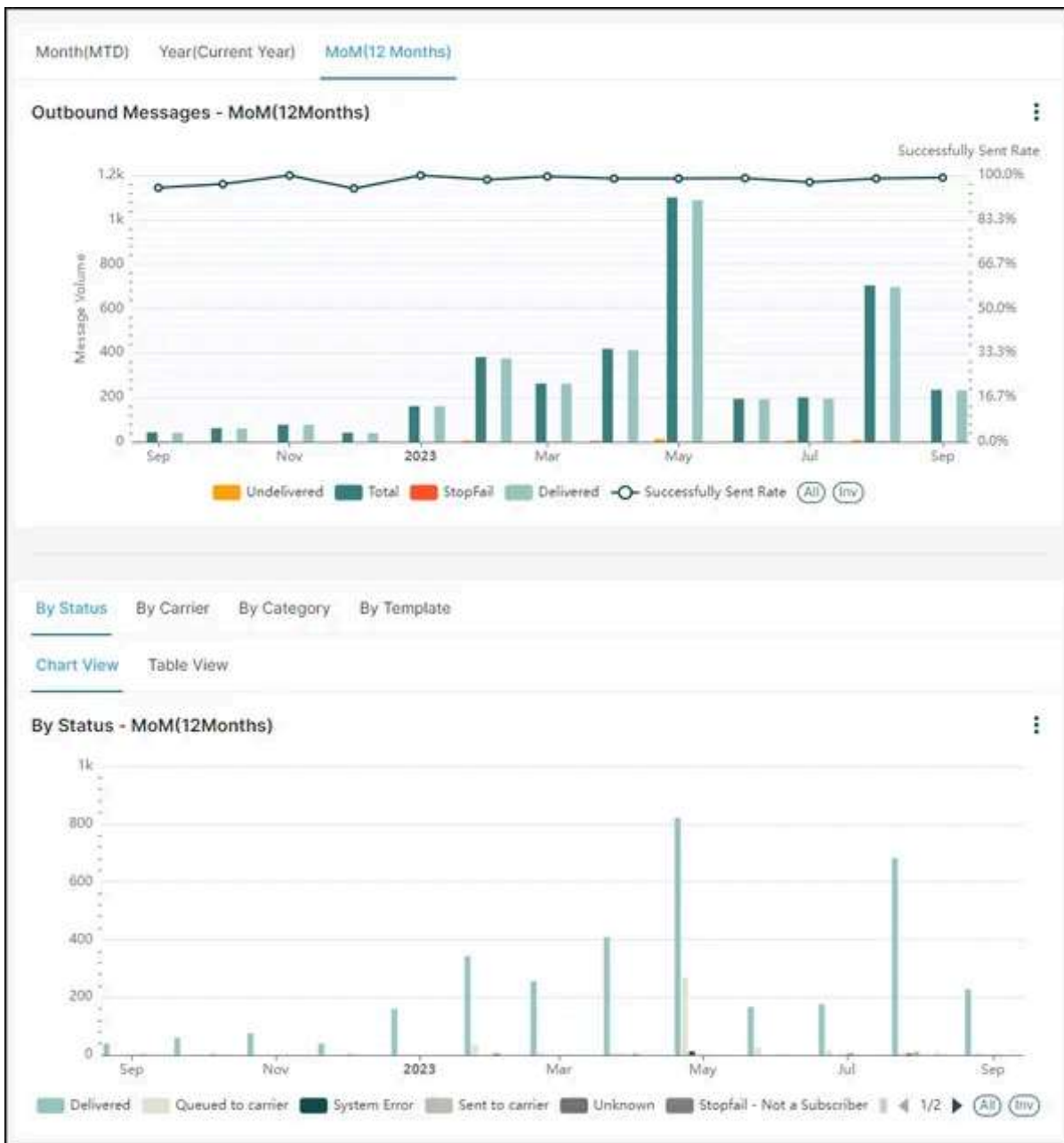


By Status Details - Year

Search

10 records...

Status	Volume	Total/Volume%
Delivered	3.24k	88.44%
Queued to carrier	367	10.03%
System Error	18	0.49%
Sent to carrier	14	0.38%
Unknown	13	0.36%
Stopfail - Not a Subscriber	4	0.11%
Message Queued	3	0.08%
Stopfail - Inactive Subscriber	3	0.08%
Blocked Number	1	0.03%



Each Dashboard has specific features; follow the links above for detailed KB articles on each Dashboard.

Charts

Charts appear in the lower left panel of the Dashboard. They convert data into quickly understandable and accessible visual representations.

The MTD and Year charts are presented as donut graphics. The MoM chart is a combined bar and line chart.

Chart data may be manipulated in various ways:



- Click the color tabs for each category to deselect or re-select that category. By default, all categories are initially visible, with smaller categories combined.
 - Deselecting the larger categories will reorganize the data. The smaller categories will become more visible on the Chart.
- Click the All button to select all categories.
- Click the Inv button to choose the opposite of the selections—to invert the selections.
- The MoM charts also include left-right arrows to scroll through all available data.

If no data are available for the selected period, “NO DATA” will be displayed.

Data Tables

Data Tables appear in the lower right panel of the Dashboard. They display the same data shown in the Charts, but in tabled format.

Data Tables have the following features and functions:


- Data columns may be sorted by clicking the column name.
- The Search field may be used to find a specific value; this is useful when working with large data sets.
- Number values may be truncated in the display, for example, 1,001 will be displayed as 1k.

If no data are available for the selected period, “NO DATA” will be displayed.

Three-Dot Icon: Refresh, Fullscreen, and Downloads

The three-dot icon  in the Chart and Data Tables areas has three functions:

- Force Refresh: Gets the latest data for the Chart or Data Table and shows when the data were last refreshed.

- Enter Fullscreen: Expands the Chart or Data Table to fill the Dashboard window. To exit, click the contract icon  on the upper right.
- Download: Allows downloading of a .CSV or PDF image file of the Chart or Data Table information:
 - CSV files will contain the data used to generate the Chart or Data Table.
 - Selecting “Download as image” will result in a PDF image file containing an image of the Chart or Data Table. Charts will include a legend.

Dashboard KB Articles

Once again, links to the individual Dashboard KB articles:

- [Outbound Performance Insights](#)
- [Inbound Performance Insights](#)
- [Subscriber Insights](#)

Was this article helpful?

Yes

No

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