METAVEO
Metrix

BUSINESS MANUAL · NOVEMBER 2026

Everything Metrix does, *and how to use it well.*

A complete guide to Metrix for the people who run, buy and measure marketing: what each feature does, which platforms it works with, how the numbers are made, and how leaders, agencies, digital marketers, creators and analysts get the most from it.

Leadership
See and share every brand's results, any time.

Agencies
A private view for each client, and reports in minutes.

Digital marketers
Plan, post, track and pause ads, test and prove what works, from one place.

Creators
Make on-brand posts faster, and see which ones landed.

Business analysts
Where every number comes from, and how far to trust it.

EDITION 2 · 9 NOVEMBER 2026
DESCRIBES METRIX AS IT RUNS ON METRIX.METAVEO.AI

METRIX.METAVEO.AI
HELLO@METAVEO.AI

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What's in *this manual*

Four parts. Part 1 explains how Metrix is built, what changes with it, and where its numbers come from. Part 2 is the feature manual, one section per feature. Part 3 shows Metrix from each reader's seat. Part 4 holds playbooks, the glossary, the limits and common questions.

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SHORT ON TIME?

- **10 minutes:** sections 01 and 02, then the section for your role in Part 3.
- **Evaluating Metrix:** sections 01 to 05, then 32 and 35.
- **Setting up a team:** sections 06 and 07, then playbook 1 in section 33.

00 BEFORE YOU START · SECTION 00

How to use *this manual*

Metrix is a marketing workspace. It brings a brand's social media, paid ads, website and email results into one place, explains them in plain words, and helps the team plan, publish, test and report. This manual covers all of it, from first sign-in to how each number is made.

Who it is for

LEADERSHIP
Founders, CEOs, CMOs and heads of business groups who want the big picture whenever they ask for it: which brands are growing, whether spend is working and where the team is stuck. Start with sections 01, 08, 24 and 28.

AGENCIES
Account managers and agency owners running many client brands, who need a private view per client and reports that take minutes. Start with sections 03, 07, 24 and 29.

DIGITAL MARKETERS
Social media, performance, email and content marketers who plan, post, run ads and improve results every day. Start with sections 09 to 21 and 30.

CREATORS
Designers, content creators and copywriters who make the posts, pictures and articles, and want to know which ones worked. Start with sections 11, 16 to 18, 20 and 31.

BUSINESS ANALYSTS
Analysts who need to know what each number means and how far to trust it. Start with sections 04, 05, 32, 34 and 35.

How each feature section is laid out

- **What it is**: one or two plain sentences at the top.
- **How it works**: numbered steps, in the order you would do them.
- **The rules behind it**: the exact limits, timings and thresholds Metrix uses, in a green box.
- **Who can use it**: which of the four seats can see or change it.
- **Why it matters**: short notes for each role, in coloured boxes.

CONVENTIONS

- Words in a box, like **Publish**, are labels you will see on screen.
- Illustrations use a sample brand, **Fernway Coffee**, with made-up numbers. They show the layout, not real results.
- A **yellow box** is a tip. A **red box** is a caution.
- "Meta" means Facebook, Instagram and Meta's ad system together.

What "Metrix today" means

This edition describes the version of Metrix running at **metrix.metaveo.ai** on 9 November 2026. Every rule, limit and label in it was checked against that version. Features that are still being built are not described as if they exist; section 35 lists what Metrix does not do today, so you can plan around it.

THE ONE IDEA BEHIND METRIX

Most teams spend hours copying numbers from Facebook, Instagram, Ads Manager, YouTube, Google Analytics and their email tool into a spreadsheet, and the spreadsheet still doesn't say what to do next. Metrix collects those numbers for you, **straight from the platforms they describe**, and each brand's page explains what changed and what to try next.

METAVEO
Metrix

01

PART 1 OF 4

Understanding *Metrix*

What Metrix is, how a workspace is put together, which platforms it reads from, and how the numbers arrive. Read this part first if you are evaluating Metrix or need to explain it to someone else.

01	Metrix on one page	The product in 60 seconds
02	With Metrix and without it	Twelve jobs, done both ways
03	How Metrix is organised	Workspaces, brands, accounts, people
04	Platforms and data sources	What is read, and what can be changed
05	How the numbers arrive	Refresh times, history and gaps

Metrix *on one page*

Metrix shows how a brand's social media, ads, website and emails are doing, all in one place. It explains the numbers in plain words, suggests what to do next, and lets the team plan, publish, test and report without leaving the app.

STEP 01
Connect
Link Facebook, Instagram, Meta ads, YouTube, Google Analytics, Brevo and Mailchimp. Collecting starts straight away.

→

STEP 02
See
Reach, interactions, ads, website visits and emails for each brand, and how it compares with competitors.

→

STEP 03
Act
Follow clear next steps. Let AI suggest, write and design posts, blog articles and emails.

→

STEP 04
Share
Test posts against each other, track whole campaigns, and send a report link that opens without a login.

7
kinds of account to connect, plus competitors' public pages and Google PageSpeed

4
seats that decide who sees which brands and what they can change

33
Google Analytics reports in 9 tabs, in plain words

100
AI credits a month on the Free plan every workspace starts on

BEFORE AND AFTER

Section 02 compares twelve everyday marketing jobs done by hand and done in Metrix, and what changes for each role.

The feature map

Group	Features	What they answer
Measure	**Dashboard, Brand overview, Signals, Posts, Paid ads, Website**	How are we doing, what changed, which posts and ads worked, and which posts sent people to the website?
Compare	**Competitors, Competitor insights, Page speed**	Where do we lead or trail our competitors, what do they post and when, and is our site faster than theirs?
Create	**Create post, Content plans, Dated posts, Mood board, Blog studio, Email**	What should we post next, and can the AI draft it in our brand style?
Improve	**Experiments, Initiatives, Blockers, AI assistant**	Which option works better, is the campaign on target, what is holding us up, and what do the numbers say?
Share and run	**Reports, Notifications, Seats, Plans and credits**	How do we show results, who sees what, and what does the AI cost?

FOR LEADERS

See every brand's results on one dashboard, whenever you like. With an Owner seat you can publish a report link for any dates in minutes, with no waiting for month end.

FOR AGENCIES

Each client is a brand with its own private view. Brands, accounts, people and reports are unlimited.

FOR DIGITAL MARKETERS

One place to read results, plan and post to Facebook and Instagram, check paid ads, test ideas and write emails.

FOR CREATORS

The AI drafts posts and pictures in the brand's colours with its real logo, pictures picked from the mood board guide the look, and each post's verdict shows which ideas to repeat.

02 PART 1 · SECTION 02

With Metrix *and without it*

The clearest way to see what Metrix does is to look at the same marketing work done two ways: by hand, across separate apps and a spreadsheet, and in Metrix. This section walks through twelve everyday jobs, then shows what changes for each role.

WITHOUT METRIX

Six apps, six logins, one spreadsheet

Facebook · Instagram · Ads Manager · YouTube Studio · Google Analytics · Email tool

`monthly_report_final_v3.xlsx`

Someone copies numbers out of each app, lines them up by hand and writes the commentary. The sheet is out of date the day it is finished, and it says what happened, not what to do.

WITH METRIX

One workspace that keeps itself up to date

- **Every account connected once**, then kept up to date by itself.
- **Each brand's page explains itself**: what changed, best and weakest posts, and up to 5 next steps.
- **The team acts in the same place**: posts, AI drafts, tests, campaigns and emails.
- **Reports go out as a link** that opens without a login.

Twelve everyday jobs, two ways

The job	Without Metrix	With Metrix
1. Collecting the numbers	Log in to each app in turn, export or copy the figures, and paste them into a sheet. Each app names, dates and counts things its own way, so the sheet needs fixing before anyone can read it.	Connect each account once. Metrix loads recent history straight away and keeps it up to date by itself; new Facebook posts arrive within about a minute. Every figure keeps one definition (section 34). SECTIONS 04–05
2. Knowing how a brand is doing	Put this month's sheet next to last month's and compare by eye. Changes are only spotted if someone looks for them.	The Brand overview shows reach, interactions, views and posts published for 7, 30 or 90 days against the period before, with the 5 best and 5 weakest posts. SECTION 09

The job	Without Metrix	With Metrix
3. Deciding what to do next	Depends on who reads the numbers and how much time they have. Two people can draw different conclusions from the same sheet.	Signals check the numbers against about 90 fixed rules and suggest up to 5 next steps, each with the rule and figures behind it. The same numbers always give the same advice. SECTION 10
4. Judging ad spend	Open Ads Manager separately from the organic results. To show a client or manager, give them access to the ad account or send screenshots.	Campaigns, ad sets and ads sit next to the organic posts, in Meta's own figures. Pause or restart an ad from Metrix. Viewers see spend and results without an Ads Manager login. SECTION 12
5. Linking posts to the website	Open Google Analytics, see a spike, and guess which post caused it.	For each post, Metrix counts the visits that platform sent that day and the next 2 against an average day the week before, and warns when posts are too close together to tell apart. A strong clue, not proof. SECTION 13
6. Watching competitors	Someone scrolls rivals' pages now and then and notes what they see. There is no steady measure, and websites are rarely compared.	Up to 5 competitors are read daily (websites weekly). You see where you lead or trail a typical competitor, when they post, the hashtags they use, and whose website is faster. SECTIONS 14–15
7. Producing content	Every post starts from a blank page and every design is made by hand. Holidays and launches are remembered, or not, by whoever is on duty.	Content plans suggest, write and design posts in the brand's colours with its real logo, on a schedule. Holidays are suggested by country, and dated posts remind the team ahead. The Blog studio drafts sourced articles. SECTIONS 16–18
8. Testing ideas	"The carousel felt better." Posts are compared at different ages, so the older one always looks stronger.	Experiments compare 2 to 4 posts at the same age on one measure. A gap under 5% is called "too close to call". SECTION 20
9. Tracking a campaign end to end	Leads live in Ads Manager, enrollments or sales in a CRM or sheet, the budget in another file. Nobody sees cost and result on one line.	An initiative puts each Meta ad's leads, cost per lead and cost next to the enrollments and revenue your team enters, against the budget and targets per campus or location. SECTION 21
10. Reporting	Screenshots go into slides every month. Numbers may change after the deck is sent, and there is no way to tell whether it was read.	Publish a report link in minutes. It opens without a login, keeps its numbers until you press Refresh, can expire, and shows how often it was viewed. PDF and CSV downloads too. SECTION 24
11. Giving people access	Passwords are shared, or everyone gets admin access to every platform. Taking access away later is easy to forget.	Four seats decide who sees which brands and what they can do. Clients see only their own brand. Seat changes take effect straight away, and Owners see who changed what. SECTION 07
12. Spotting problems	A disconnected account or a failed post goes unnoticed until the numbers drop. Stuck work lives in someone's inbox.	Each account shows a health status with a Reconnect button, alerts arrive in Metrix, a post that fails to go out is marked "Failed", and blockers open 14 days or more are flagged. SECTIONS 22, 25

What changes for each role

LEADERSHIP

Without Results arrive late, in a different shape from each team, and the "why" depends on who wrote the deck.

With Results whenever you want them: one Dashboard across every brand, a report link an Owner can publish at any time for any dates, Meta's own spend figures, and the signals that need attention.

AGENCIES

Without Each client's logins and reports are handled separately, and reporting week eats the team's time.

With Every client is a brand in one workspace, clients see only their own, and reports go out as links with signals and ad results.

DIGITAL MARKETERS

Without Time goes on gathering numbers and starting posts from scratch; ideas are judged on feel.

With Numbers arrive by themselves, AI drafts the posts, experiments settle debates, and results show which posts sent visitors.

CREATORS

Without Every post starts from a blank page, the brand's look drifts from one designer to the next, and nobody says which posts worked.

With Drafts arrive written and designed in the brand's colours with its real logo, pictures picked from the mood board guide the style, and verdicts and experiments show what to make again.

BUSINESS ANALYSTS

Without Figures from different apps are stitched together with mixed definitions, dates and time zones.

With Each figure keeps its platform's definition and date range, gaps show as gaps, and typed-in figures are kept apart from measured ones.

WHAT STAYS THE SAME

Metrix doesn't replace your team's judgement, and it doesn't prove which post caused a sale. Some work still happens elsewhere: posting video, running LinkedIn, X or TikTok, managing Google Ads, and keeping customer records in your CRM. Section 35 lists these limits, and what to do instead.

How Metrix *is organised*

Everything in Metrix sits inside a **workspace**. A workspace holds **brands**; each brand holds its **connected accounts** and all the work done for it. **People** join the workspace with a **seat** that decides which brands they see and what they can do.

THE BUILDING BLOCKS

WORKSPACE

Your company or agency

Holds the brands, the people and their seats, the plan and the AI credits, and a default time zone that new brands start with.

BRAND

One business, product or client

Has its own accounts, posts, ads, website, emails, plans, experiments, initiatives, blockers, reports, brand colours, mood board, country and time zone.

CONNECTED ACCOUNT

A login Metrix reads from

A Facebook Page, Instagram account, ad account, YouTube channel, Google Analytics website, or a Brevo or Mailchimp account.

PEOPLE AND SEATS

Each person has **one seat** in **one workspace**: Owner, Brand editor, Workspace viewer or Brand viewer. Brand seats see only the brands given to them. See section 07.

WORK INSIDE A BRAND

Posts and ads are collected for you. Plans, dated posts, experiments, initiatives, blockers, competitors and reports are things your team creates.

The objects you will work with

Object	What it is	Where it comes from
Post	A Facebook, Instagram or YouTube post, with its figures day by day.	Collected from the platform, or made in Metrix
Campaign, ad set, ad	Meta's three levels of paid advertising, each with Meta's own results and spend.	Collected from your ad accounts
Signal	Something Metrix noticed in the numbers, sorted as Negative, Neutral or Positive, with a suggested next step.	Worked out by Metrix from fixed rules
Content plan	A brief and a schedule that tell the AI what to suggest, write and (if you allow it) post.	Set up by your team
Dated post	A launch, event or holiday on a date, with a reminder and optional AI post.	Set up by your team, or suggested holidays
Experiment	A fair test between 2 to 4 posts on one measure.	Set up by your team
Initiative	One marketing campaign: its posts, ads, targets, budget and results.	Set up by your team
Blocker	Anything holding the brand's work up, with a severity.	Set up by your team
Competitor	A rival business whose public accounts and website Metrix reads.	Added by your team, or suggested

Object	What it is	Where it comes from
Report and report link	A view of the results for a period, as a file or a link that opens without a login.	Made by your team
AI credit	The unit that AI features use. Everything else is free.	Monthly allowance, or added by the Metaveo team

Setting Metrix up to match your organisation

AN AGENCY

One workspace for the agency. Each **client is a brand**. Client contacts get a Brand viewer seat for their brand only; freelancers get a Brand editor seat on the brands they work on.

A BUSINESS GROUP

One workspace for the group. Each **business, college or campus is a brand**. Leaders get a Workspace viewer seat and see every brand without being able to change anything.

ONE COMPANY

One workspace. Make a brand for **each product line or market that has its own accounts** and is reported on separately. If everything is reported together, one brand is enough.

TIP

A good test for "should this be its own brand?": would you send it its own report? If yes, make it a brand. Brands are unlimited, so there is no cost to splitting.

04 PART 1 · SECTION 04

Platforms *and data sources*

Metrix reads from seven kinds of account that a brand connects, plus two public sources it reads for you: competitors' public pages and Google PageSpeed Insights. For each one, here is what Metrix reads and the only things it can change.

Account	What Metrix reads	What Metrix can do	Good to know
Facebook Pages Connect Facebook & Instagram	Posts and their figures, Page figures, and comments (read live, never stored)	Publish posts you create, schedule or plan; live updates for new posts	Pick the Pages you want. Facebook holds back Page figures for Pages with fewer than 100 followers.
Instagram same Facebook login	Posts, post figures and account figures for business and creator accounts linked to a Page	Publish posts (JPEG pictures)	The full option: posting, ads and competitor reading work only this way.
Instagram only Connect Instagram only	Posts, post figures and account figures	Read only	For a business or creator account with no Facebook Page. No posting, no ads. The login lasts 60 days and renews itself while in use.

Account	What Metrix reads	What Metrix can do	Good to know
Meta ad accounts **Set up paid** on the Facebook card	Campaigns, ad sets and ads with Meta's own results, spend and status; up to 2 years of history	Pause or restart an ad	Choose which ad accounts each brand uses. Several brands can share one ad account.
YouTube Google login	Videos, their figures and channel figures	Read only	One channel per sign-in; use **Add another channel** for more.
Google Analytics Google login	Website visitors, sources, pages, devices, audience, key events, sales and the last 30 minutes	Read only	One sign-in can add several websites (properties). Also tells Page speed which site to test.
Brevo or **Mailchimp** on the brand's Email page	Email campaigns and their results; contacts and lists	Send or schedule emails (Owners); manage campaigns, contacts and lists; Brevo: a webhook for live results	One provider per brand, connected with an API key or, for Mailchimp, its own sign-in. Contact lists stay with the provider.

Sources Metrix reads for you

COMPETITORS' PUBLIC PAGES

Public Instagram business and creator accounts (read through the brand's Facebook & Instagram connection), public Facebook Pages (read through Metrix's own Meta app, once Meta approves it) and websites of up to 5 competitors per brand. Only public information is read; competitors never connect anything (section 14).

GOOGLE PAGESPEED INSIGHTS

Google's own speed test, run on your homepage and each competitor's, on mobile and desktop, with Chrome's real-visitor data for busy enough sites (section 15).

NOT CONNECTED TODAY

LinkedIn, X (Twitter), TikTok, Google Ads, Google Search Console and website platforms such as WordPress are not connected to Metrix today. LinkedIn and X accounts can be added by hand to keep a list of them, but nothing is collected from them. For campaigns that run there, add the results to an initiative by hand with **Add a source** (section 21).

FOR LEADERS

Meta, Google Analytics, YouTube and email results sit side by side for every brand.

FOR AGENCIES

Several brands can use the same ad account, each with its own rows, so a shared agency ad account is no problem.

FOR ANALYSTS

Each number keeps its source platform's definition. The glossary in section 34 gives each one.

How the *numbers arrive*

Once an account is connected, Metrix collects its numbers by itself. This section explains how each number stays up to date, how far back it goes, what happens when something breaks, and which numbers are read live.

THE PLATFORMS
Your accounts
Facebook, Instagram, Meta ads, YouTube, Google Analytics, Brevo, Mailchimp.

→

AUTOMATICALLY
Metrix updates
Reads new posts, figures and ad results; re-checks recent days; retries if a platform is busy.

→

YOUR WORKSPACE
Brand pages
Overview, signals, posts, paid ads, website, emails, competitors.

→

WHEN YOU SHARE
Reports
Downloads, and links frozen until you press Refresh.

How fresh each kind of number is

Data	How it stays up to date	History when you connect
Posts and their figures	Updated automatically. Posts up to 30 days old are refreshed on every update, up to a year old once a day, older once a week.	The full post history is read once.
New Facebook posts	Within about a minute, with live updates on. They are on for every Page you connect, and you can turn them off. Comments and likes still wait for the next update. Instagram has no live updates.	-
Account figures (followers, Page figures)	Updated automatically, along with the posts.	About 90 days of day-by-day figures (30 for Instagram); more builds up from then on.
Paid ads	Updated automatically; each update re-checks the last 7 days. An opened ad reads Meta live.	Up to 2 years.
Website page	Read live from Google each time you open it; the realtime view refreshes every minute. Reports read Google live too; 11 daily figures Metrix saves feed the brand's signals.	The Website page: whatever Google Analytics holds. Saved daily figures: from about 90 days before you connect.
Email results	Updated automatically. Brevo results arrive within minutes; Mailchimp campaigns from the last 14 days update every 30 minutes.	Your newest 2,000 campaigns with the provider.
Competitors	Social accounts daily, websites weekly.	About a year of posts.
Page speed	Weekly, or when you press Test again (at most once every 15 minutes).	Keeps a year of results.
Facebook comments	Read live when you open a post; never stored.	-
Overview paid headlines	Read live from Meta each time the Overview opens in the Paid view.	-

WHEN SOMETHING GOES WRONG

- If an update fails, Metrix tries again twice, a minute apart. If all three tries fail, it tries again at the next update and sends a "sync failed" alert.
- Each account shows a **health status**. If a login or permission stops working, Metrix says why and shows a **Reconnect** button.
- You get an alert when an account needs reconnecting, or when charts fall more than a day behind.

NO MADE-UP NUMBERS

- A day with no reading shows as a **gap** in the chart, never a made-up line.
- A figure the platform doesn't give shows as a **dash** or **"Unavailable"**, never zero.
- Reporting days follow the **brand's time zone**, which it takes from the workspace when the brand is added.

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02

PART 2 OF 4

The feature *manual*

One section per feature, in the order a team meets them: set up, measure, compare, create, improve, share. Each section says what the feature does, how to use it, the exact rules behind it, and who can use it.

06–07	Set up	Getting started, seats and access
08–13	Measure	Dashboard, overview, signals, posts, ads, website
14–15	Compare	Competitors and page speed
16–19	Create	Posts, content plans, blog, email
20–23	Improve	Experiments, initiatives, blockers, assistant
24–27	Share and run	Reports, alerts, credits, privacy

Getting *started*

Setup takes a few minutes: create an account, name your workspace, add a brand and connect its accounts. Metrix starts collecting the brand's numbers straight away.

How it works

1. **Create your account** with your work email and a password of at least 8 characters, or sign in with Google.
2. **Confirm your email** with the link Metrix sends. It works for 24 hours. Signing up with Google skips this step.
3. **Set up your profile** with your name and a picture.
4. **Name your workspace and choose its time zone.** New brands start with it, and reporting days start and end at midnight in a brand's time zone.
5. **Add your first brand.** A brand is one business, product or client you want to track. In its Settings, set its country on the **Country and holidays** card.
6. **Connect the brand's accounts** on its Accounts page. The first update starts within seconds.
7. **Invite your team** and give each person a seat (section 07).

THE RULES BEHIND IT

- **Remember me** keeps you signed in for up to 7 days; without it, for 12 hours.
- A **forgotten-password link** works for 1 hour.
- Signing in with Google shares only your name, email address and profile picture.
- Only an **Owner** can add brands. There is no limit on how many.
- Metrix reads each account's **full post history once**, then checks for new posts on every update.
- The first update also loads **recent day-by-day account figures**: about 90 days for Facebook, YouTube and Google Analytics, and 30 days for Instagram.

HANDY EXTRAS

- Take the **Quick Tour** from your account menu for a page-by-page walkthrough.
- Press **Ctrl+K** (**Cmd+K** on a Mac) to jump to a main page, such as the Dashboard or Brands.

A first-week checklist

Day	Do this	So that
Day 1	Connect every account the brand uses. Check each one shows a healthy status.	Numbers start to arrive.
Day 1	Set brand colours and upload a few reference pictures to the mood board.	AI designs look like the brand.
Day 2	Add competitors. Make sure Google Analytics is connected, so Page speed knows your site.	Comparisons and speed tests can start.
Day 2	Invite the team with the right seats.	Everyone sees what they need, and nothing more.
Day 3	Create an initiative for the current campaign and set up a content plan.	Work is tracked from the start.
Day 5	Read the brand's signals and publish a first report link.	Stakeholders see Metrix working.

Team seats *and access*

Each person gets one of four seats. The seat decides which brands they see and what they can do there. Agencies can give each client or freelancer their own brands only, and leaders can watch everything without any risk of changing it.

Owner
Sees every brand, including new ones. Can do everything.

Brand editor
Works on the brands given to them. Writes emails but can't send them.

Workspace viewer
Sees every brand. Looks and asks the assistant; changes nothing.

Brand viewer
Sees only the brands chosen for them. Great for clients.

What each seat can do

Action	Owner	Brand editor	Workspace viewer	Brand viewer
See brands	All	Given	All	Chosen
See results, posts, ads, website, email campaigns, competitors	Yes	Yes	Yes	Yes
Ask the AI assistant	Yes	Yes	Yes	Yes
Add a brand; delete a brand	Yes	No	No	No
Connect and disconnect accounts	Yes	Yes	No	No
Create, schedule and publish posts; run content plans	Yes	Yes	No	No
Pause or restart ads; remove an ad account	Yes	Yes	No	No
Run experiments, initiatives and blockers	Yes	Yes	No	No
Add competitors; test page speed	Yes	Yes	No	No
Write and test emails; see and manage contacts; comment on posts	Yes	Yes	No	No
Schedule or send an email	Yes	No	No	No
Publish, refresh and turn off report links	Yes	Yes	No	No
Add people	Any seat	To own brands, as editor or viewer	No	No
Change a person's seat; make Owners or workspace viewers	Yes	No	No	No
Plan & Usage and buying credits; workspace Recent Activity	Yes	No	No	No

THE RULES BEHIND IT

- Each person has **one seat** and belongs to **one workspace**. Someone already in another workspace can't be added.
- **Nobody can give more access than they have.**
- A seat change can never leave a workspace **without an Owner**. A sole Owner should make someone else an Owner before deleting their own account.
- Seat changes take effect **straight away**.

ADDING PEOPLE

1. An Owner adds a person by email and picks their seat and brands. A Brand editor can invite people to their own brands.
2. A new person gets a welcome email with a temporary password, and adds any missing name or picture at first sign-in.
3. Someone removed earlier and added again gets their account back with the new seat.

FOR LEADERS

An Owner seat lets you publish, refresh or turn off report links whenever you need. For board members who only read, a Workspace viewer seat gives full visibility with no risk.

FOR AGENCIES

Clients get a Brand viewer seat on their own brand. They never see your other clients.

FOR DIGITAL MARKETERS

Brand editors can do nearly everything except send emails, which stays with Owners.

FOR CREATORS

A Brand editor seat on the brands you work on is enough to plan, design and publish posts, and you see only those brands.

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08 PART 2 · SECTION 08 · MEASURE

Dashboard *and brands*

The Dashboard is the home page. It shows every brand you can see, together: what was posted, what is being tested, what is stuck and what the team has been doing. The Brands page lists every brand so you can open any one of them.

What the Dashboard shows

- **Tiles**: Active Brands, Tracked Posts, Running Experiments and Open Blockers.
- **Charts**: posts by brand, the platform mix, and the publishing rhythm: a heatmap of posting over the last four months. An email card appears when email is connected.
- **Lists**: active experiments, workspace members and their seats, and Recent Activity: the latest 12 changes.

The Brands page

- Every brand, with search and filters for status and industry.

THE RULES BEHIND IT

- You only ever see the brands your seat allows.
- The Dashboard uses no AI credits.

FOR LEADERS

A drop in posting shows at once on the heatmap, before it shows up in results.

FOR AGENCIES

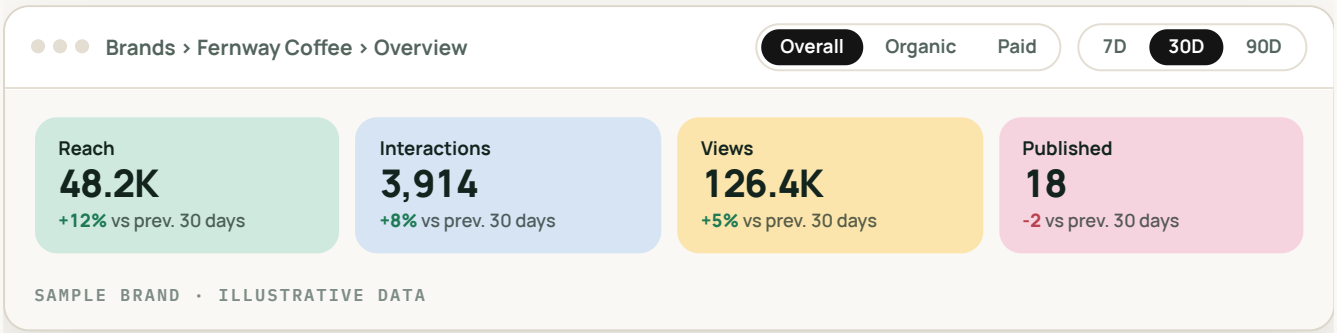
One screen for every client. The Open Blockers tile shows at once if any client is stuck.

- A preview of each brand's accounts, posts and update status when you pick it.
- Open a brand to go to its Overview.

09 PART 2 · SECTION 09 · MEASURE

Brand *overview*

Each brand's Overview answers two questions: how are we doing, and what should we do next? It is the page most people open first.



How it works

1. **Choose a view**: Overall, Organic (normal, unpaid posts) or Paid.
2. **Choose a period**: the last 7, 30 or 90 days. 30 is the default.
3. **Read the headline figures.** Organic and Overall figures compare with the period before, of the same length.
4. **Look below** for the publishing rhythm and platform momentum: how much you publish on each platform compared with the period before.
5. **Learn from both ends**: the 5 best-performing and 5 underperforming posts (or ads, in the Paid view).

THE RULES BEHIND IT

- **Organic headlines**: reach, interactions, views and posts published.
- **Paid headlines**: amount spent, reach, impressions and post engagements, exactly as Meta reports them, without a comparison.
- The page also shows a website summary, running experiments, open blockers, the signals (section 10) and a content calendar.
- Editors can click a day on the calendar to plan a post.

Signals *and next steps*

Metrix checks each brand's numbers against about 90 clear rules. It sorts what it finds into **Negative**, **Neutral** and **Positive**, then suggests up to 5 next steps. Each one says why it was suggested. These are rules, not AI guesses: the same numbers always give the same advice.

Positive · Working well

Carousel reach went up 41% on the previous 30 days

Make more carousels like this one

`Rule: a number goes up by 25% or more`

Negative · Needs attention

Instagram interactions fell 23%

Look at your 5 weakest posts before planning the next ones

`Rule: a number goes down by 20% or more`

Negative · Needs attention

The "New menu photos" blocker has been open for 19 days

Fix it, or close it with a short note

`Rule: a blocker has been open 14 days or more`

SAMPLE BRAND · ILLUSTRATIVE DATA

How it works

1. Metrix compares the brand's numbers for the period with the period before, and checks its posting, formats, timing, ads, website, email and open work.
2. Each finding is filed under **Negative**, **Neutral** or **Positive**.
3. The most useful findings become the **Recommended next** list ("What to do, in order"): up to 5 next steps. Each group shows 3 findings, and "Show … more" opens the rest, up to 10.
4. Click **How we worked this out** on any item to see the numbers and the rule behind it.

EXAMPLES OF THE RULES

- ✓ A figure **falls by 20% or more** against the period before.
- ✓ A figure **jumps by 25% or more**.
- ✓ Posting **slows down by 25% or more**.
- ✓ A blocker stays **open for 14 days or more**.

About 90 checks in 14 areas: engagement, publishing, channels, email, effort, experiments, ads, format, blockers, timing, website, planning, content and audience. When effort figures are on, a few next steps also carry an estimate of the time they take.

FOR LEADERS

Read the Negative list each week. It is the shortest route to what needs your attention.

FOR AGENCIES

Signals can go into a client report, so the client sees the "why" next to the numbers.

FOR DIGITAL MARKETERS

Act on one Recommended next step a week, then watch whether the signal clears.

Posts, verdicts, *effort and return*

Every post and ad for the brand is in one list, with all its figures. Each post gets a short verdict on its direction, and Metrix estimates the hours spent on artwork and the interactions each hour brought.

The Posts page

- Tabs for **All posts**, **Organic** and **Paid ads**, as a list or a grid.
- Filter by channel, platform, type, status, dates, or whether it was posted through Metrix.
- Open a post to see its picture and all its figures, each with a day-by-day chart.
- Read the Facebook comments under a post. They are read live from Facebook, and Metrix keeps no copy.
- Leave team comments on any post. Only people in your workspace see them.
- Editors can use **Add numbers** to type in figures a platform doesn't give, such as likes or shares; they are saved as entered by hand.

Post verdicts

A verdict compares how fast a post gained over its last 3 readings with the 3 before:

Too early to call	Fewer than 6 readings yet, about the first week.
Still picking up	Gaining more than 15% faster than before.
Holding steady	Within 15% of its earlier pace.
Past its peak	Gaining more than 15% slower than before.
Not moving	No new gains in either window.

Effort and return

- Metrix counts the artworks you made, estimates the hours they took, and shows the interactions each hour brought.
- It assumes **60 minutes per artwork** until you set your own on the **Time per artwork** card in the brand's Settings, per format if you like, with extra minutes for each extra platform.
- The same design posted to several platforms **within 24 hours counts as one artwork**.
- You can leave effort figures out of any report you share: untick **Include time and effort figures**.

HOW POST FIGURES STAY UP TO DATE

- Every connected account **updates automatically**; nobody has to export anything.
- Posts up to 30 days old are refreshed on every update, posts up to a year old once a day, and older posts once a week.
- With live updates on for a Facebook Page, new posts appear within about a minute.
- A day with no reading shows as a gap in the chart, never as a made-up line.

FOR LEADERS

Effort and return turns "the team is busy" into hours spent and the interactions they brought.

FOR AGENCIES

Team comments keep client feedback next to the post it is about.

FOR DIGITAL MARKETERS

Judge a post after its first week, and copy the formats that keep "Still picking up".

FOR CREATORS

Set your real time per artwork in the brand's Settings, so the Effort and return figures match the hours you really spend.

---

12 PART 2 · SECTION 12 · MEASURE

Paid *ads*

Metrix shows your Facebook and Instagram ad results exactly as Meta reports them, right next to your normal posts. Campaigns open to their ad sets and ads, as in Meta Ads Manager, so every figure matches what you see there.

Posts › Paid ads

Campaigns | All ads

Name	Type	Result	Amount spent	Status
Spring blend	Campaign · Leads	142 leads	$360	Running
Lisbon, 25–45	Ad set	96 leads	$228	Running
Porto, 18–35	Ad set	46 leads	$132	Paused
Café opening	Campaign · Engagement	8,410 ThruPlays	$190	Running

SAMPLE BRAND · ILLUSTRATIVE DATA

How it works

1. **Connect Facebook & Instagram** on the Accounts page, then press **Set up paid** on the Facebook card and choose the ad accounts.
2. Metrix brings in **up to two years** of past ad results. A long history arrives over the first few updates.
3. After that, ad results **update automatically**. Each update re-checks the last 7 days, so late changes from Meta are caught.
4. The **Paid ads** tab lists campaigns, which open to their ad sets and ads, each with Meta's own lifetime result, amount spent and status. Switch to **All ads** to see every ad in one list.
5. **Open any ad** for its figures for today, yesterday, the last 7, 14 or 30 days, this or last month, its whole life, or your own dates. These are read from Meta when you open the ad.

THE RULES BEHIND IT

- ✓ **Results follow the goal the ad set is optimised for.** A lead ad counts leads, a message ad counts conversations started, a video ad counts ThruPlays, the same way Ads Manager counts them.
- ✓ **No home-made numbers.** If Meta doesn't report a figure, Metrix shows a dash instead of a guess.
- ✓ **Your currency.** Amounts are in the ad account's own currency.
- ✓ **Pause or restart** an ad from Metrix (Owners and Brand editors). Meta stops it straight away; its budget, audience and campaign stay the same, and restarting an ad doesn't switch on a paused ad set or campaign. Archived, deleted, rejected or ended ads, and ads with a billing problem, can't be switched.
- ✓ **Remove ad account** takes an ad account off a brand, with its ads, campaigns, spend and results. Organic posts stay, and other brands sharing the account keep it.

● FOR LEADERS
The numbers match Ads Manager, so finance, the agency and the team argue about decisions, not figures.

● FOR AGENCIES
Clients see ad spend next to organic results without being given access to Ads Manager.

● FOR DIGITAL MARKETERS
Compare results and spend across ad sets, then pause a weak ad without leaving Metrix.

13 PART 2 · SECTION 13 · MEASURE

Website *and visits after a post*

The Website page shows your Google Analytics figures in plain words: how many people visit, where they come from and what they do. For every post, Metrix also shows the visits that followed it.

How it works

1. **Connect Google Analytics** on the Accounts page and tick the websites (properties) the brand uses.
2. **Pick a period**: 7D, 28D, 90D or 365D, or your own dates up to 366 days.
3. **Choose from 33 reports in 9 tabs** (below).
4. **Hover over any figure** for a plain explanation of what it means.
5. **Click a day on the chart** to see it against the day before and an average day: where visitors came from,

Tab	What it covers
Overview	The main numbers
Acquisition	Where visitors come from
Geography	Countries on a map, plus regions and cities
Pages	What they open
Technology	Phone or computer
Audience	Who they are
Events	What they do
Revenue	Online sales

the pages they landed on, what they did, the hour-by-hour pattern and the posts that went out.

Tab	What it covers
Realtime	Who is on the site now

THE RULES BEHIND IT

- Ready-made periods end **yesterday**, because today is still being counted. The last 2 days look faded because Google may still add to them.
- The live view covers the **last 30 minutes** and refreshes every minute.
- Age, gender and interests appear only if Google signals are on in your Google Analytics. Sales appear only if your site tracks sales.
- A figure Google doesn't have shows as **"Unavailable"**, never as a false zero.
- Every report table has an **Export CSV** button. It exports the rows on the page you are viewing (25 at a time).
- The Website page and Reports read Google live. A published report keeps the figures it had when published.

Visits after a post

In **Posts and website visits**, Metrix counts the visits the post's platform sent to your website on the day of the post and the 2 days after. It compares them with an average day in the 7 days before, and shows the extra visits (for example **+84**) and the change (for example **"2.0× usual"**).

- Visits from ads are left out, so the number reflects the post itself.
- If another post on the same platform went out within 2 days, Metrix warns that their visits overlap.

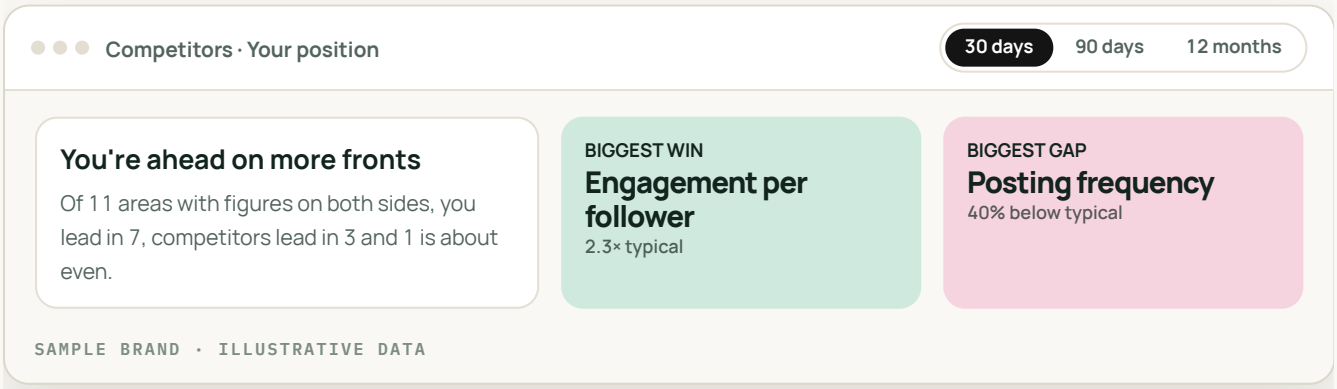
READ IT THE RIGHT WAY

It counts every visit from that platform in the window, not only clicks on the post. That makes it a strong clue, not proof that the post brought every visit. Social posts are not tagged with tracking links (UTM tags), so Metrix matches visits by platform and time.

14 PART 2 · SECTION 14 · COMPARE

Competitors *and competitor insights*

Add up to 5 competitors. Metrix reads their public Instagram business accounts, Facebook Pages and websites, and shows where you lead, where you trail, and what they post, when they post it and how it lands.



How it works

1. **Add a competitor by name.** Metrix finds its accounts and checks each one is the same business before it is used. Or use **Find competitors** for suggestions; nothing is added until you accept it.
2. Metrix reads **about a year of posts** first, then checks social accounts daily and websites weekly.
3. **Pick a period**: 30 days, 90 days or 12 months.
4. Read **your position**: wins and gaps against a typical competitor.
5. Pick one competitor for a **head-to-head**: every figure for both of you, side by side.

THE RULES BEHIND IT

- A lead counts when you are **at least 15% better or worse** than a typical competitor.
- **"Typical" is the middle one**: half your competitors do better and half worse, so one huge account can't skew it.
- If either side has no figure for an area, Metrix leaves it out and says why.
- Competitor figures and comparisons use **no AI credits**. Find competitors, the written profile and "Strengths and next steps" use 1 credit each.
- Reading competitors' Instagram needs the brand's **Facebook & Instagram connection**. Facebook competitor Pages are read once Meta approves Metrix's access to public Page content; until then the Facebook view says so. Follower growth fills in once Metrix has collected daily counts for the period you pick.

Competitor insights

PLATFORM BY PLATFORM

Instagram, Facebook and website, each on its own. Their best posts this period and their latest public posts.

WHEN AND HOW THEY POST

The days they post and the time of day, in your brand's time zone, and the day with their best engagement. Hashtags used on 2 or more competitor posts but not by you.

AI PROFILE AND NEXT STEPS

A written profile: what they offer, who they serve, their strengths and weak spots. Next steps come from measured figures; any point quoting a figure that doesn't match is left out.

15 PART 2 · SECTION 15 · COMPARE

Page *speed*

How fast is your website, and theirs? Metrix runs Google's PageSpeed Insights, the test behind pagespeed.web.dev, on your homepage and every competitor's, on mobile and desktop.

What you see

- **Four scores** out of 100, for mobile and desktop: Performance, Accessibility, Best Practices and SEO. 90–100 is good, 50–89 needs improvement, 0–49 is poor.
- **What real visitors experience**: Chrome's data from the last 28 days, with the Core Web Vitals (LCP, INP and CLS) and Google's pass or fail assessment.
- **Lab metrics** from one test run, such as Largest Contentful Paint.
- **What would make it faster**: Google's suggested fixes, plus the checks your site fails for accessibility, best practices and SEO.
- **Performance over time**, with a year of results to show the trend.

THE RULES BEHIND IT

- Sites are tested **every week, on their own**.
- Changed your site? Press **Test again** for fresh results in a minute or two (at most once every 15 minutes).
- Your site is the one in your **Google Analytics** connection, so connect Google Analytics first.
- On the Competitors page, every site is shown side by side. Pick one to see it in full.
- Page speed uses **no AI credits**.

WHY IT MATTERS

A slow mobile page wastes ad spend: people click, then leave before the page loads. Check page speed before a big campaign.

16 PART 2 · SECTION 16 · CREATE

Create *post*

Publish or schedule posts to Facebook and Instagram from Metrix. Metrix follows each post until it is live, and tells you if it needs help.

How it works

1. On the Posts page, click **Create post** and pick one or more Facebook Pages or Instagram accounts.
2. Write a caption of up to **2,200 characters** and add **1 to 10 pictures**. Several pictures become a carousel on Instagram and a multi-photo post on Facebook.
3. Choose **Instant**, **Schedule** for later in your own time zone, or **Save draft**.
4. Metrix follows the post until it is live and **tries up to 5 times in all** if the platform is busy.

THE RULES BEHIND IT

- Pictures can be JPEG or PNG, up to 8 MB each. **Instagram accepts JPEG only.** Video is not supported.
- If an account needs reconnecting, the post is marked **Needs you to look** instead of failing quietly.
- Posts made in Metrix carry a "Posted via Metrix" label inside Metrix, so you can filter them.
- **Deleting a post in Metrix only removes it from Metrix.** It is never deleted from Facebook or Instagram. Deleting a scheduled post cancels it.
- Posting yourself uses **no AI credits**.

Content plans, dated posts *and mood board*

Tell Metrix about your brand once. On your schedule, it suggests post ideas, writes the text and designs a picture in your brand colours with your real logo, and, if you allow it, posts them for you.

How a content plan works

1. **Write a brief once**: what the plan is about, up to 25 topics, up to 20 useful links, and up to 8 reference pictures from the mood board, of which the first 4 guide the artwork. **Use the latest news** is on by default; switch it off if ideas shouldn't draw on recent news.
2. **Choose how often**: every day, every other day, every week (the default, at 9 am) or every other week, in the brand's time zone, with 1 to 10 ideas each time (3 by default).
3. **Choose how much Metrix does** (right).
4. **Check and publish** the drafts, or let them go out on their own.

Mode	What happens
Suggest ideas	You choose which ideas to turn into posts.
Suggest and write	Posts are written and designed, ready for you to check and publish.
Suggest, write and post	Posts go live with no review. You must tick a box to agree, and the plan shows who switched it on and when.

THE RULES BEHIND IT

- Each post gets a caption with up to 30 hashtags and a square picture with a short headline. The AI is asked to keep captions under 2,000 characters and headlines to 8 words or fewer.
- Pictures use your brand colours, or your logo's colours if none are set.
- Your real logo is blended into the bottom-right corner of each picture. The AI never redraws it. You can switch the logo off for a plan.
- Metrix shows the AI the brand's last 40 idea headlines, blog ideas included, so it doesn't repeat itself.
- Plans make single-picture posts. Ideas are spread across the plan's channels; when the plan posts for you, each idea goes to all of them.
- If a post can't go out on its own, for example because an account was disconnected, it is kept as a draft with the reason.

DATED POSTS AND HOLIDAYS

- Mark a launch, event or holiday on a date. Metrix reminds the team **1 to 14 days before** (3 unless you change it).
- Choose **Remind us**, **Write it for us**, or **Write it and post it on the day**.
- A date that has already passed is never posted automatically.
- Metrix suggests **holidays for the brand's country and region** up to 30 days ahead, and, for public holidays and celebrations, reminds Owners and editors 14 days before unless a post is already planned. Set the country in the brand's Settings.

MOOD BOARD AND BRAND COLOURS

- Keep up to **50 reference pictures** per brand: past posts, campaign shots and styles you like (JPEG or PNG, up to 8 MB).
- Pick up to 8 of them for a plan or dated post; the first 4 guide the AI's design.
- Set up to **6 brand colours** in the brand's Settings. AI pictures and blog covers use them.

FOR CREATORS

Start a plan in **Suggest and write**, so every draft waits for you to check. Keep the brand colours current, and put your best reference pictures first when you pick them: the AI designs from the colours and the first 4 pictures.

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18 PART 2 · SECTION 18 · CREATE

Blog *studio*

Metrix follows the news in your field and turns it into article ideas, with the facts and sources behind them, then writes full drafts with a cover picture. You stay in charge of what goes on your website.

How it works

1. **Follow a topic.** Give it a name, some background (up to 4,000 characters), up to 20 keywords and a schedule. The default is daily at 7 am.
2. On schedule, the AI **reads recent news**, mostly from the last 7 days, and suggests up to 10 article ideas (you choose how many), each with its facts and sources.
3. An optional check **skips ideas too close to earlier ones**.
4. **Approve an idea**, or let Metrix write automatically. You get an article of **900 to 1,400 words** with a wide cover picture, in your brand colours if you've set them.
5. **Edit, copy the HTML, download the cover**, or press **Promote on social** to turn it into Facebook and Instagram posts.

THE RULES BEHIND IT

- ✓ **Metrix never publishes to your website.** You copy the article in yourself, so nothing goes live without you.
- ✓ Reading the news uses credits only when it finds something new.
- ✓ Article length is an instruction to the AI; check the word count before you publish.

FOR DIGITAL MARKETERS

One article becomes a week of content: the blog post, plus social posts from Promote on social, plus a mention in your next email.

Email campaigns *and contacts*

Write, test, send and measure email campaigns through the brand's own Brevo or Mailchimp account, with the results next to social and website results.

How it works

1. **Connect** the brand's Brevo or Mailchimp account from its Email page. Each brand uses one provider.
2. **See each campaign's results**: sent, delivered, opens, clicks, unsubscribes, bounces and spam complaints.
3. **Build an email from blocks**: headings, text, pictures, buttons, dividers, spacers and columns. Start from blank, a template saved in Metrix, or one of your provider's templates.
4. **Write with AI**: 5 subject lines and 3 preview lines, or a full first draft.
5. **Send a test** to people in your workspace, then **schedule it or send it now**.

THE RULES BEHIND IT

- **Only an Owner can schedule or send.** Brand editors can write and test.
- A scheduled send must be between 10 minutes and one year ahead. "Send now" needs a confirmation tick.
- **Switch on** `Link tracking` to tag links to your own website (source brevo or mailchimp, medium email, campaign = the email's name), so Google Analytics shows the email as the source. You can edit the tags.
- Pictures can be up to 2 MB on Brevo and 1 MB on Mailchimp. Mailchimp may need a paid plan to schedule sends.
- Results update automatically. Brevo results arrive within minutes; Mailchimp campaigns from the last 14 days update every 30 minutes.

CONTACTS AND CAMPAIGN INSIGHTS

The Email page has tabs for `Campaigns`, `Lists` (Audiences on Mailchimp), `Senders` and, for Owners and editors, `Contacts`: browse and search, add people with their consent, remove or unsubscribe them, import a CSV file, export up to 25,000 contacts, or start a new list. Contact lists stay with Brevo or Mailchimp.

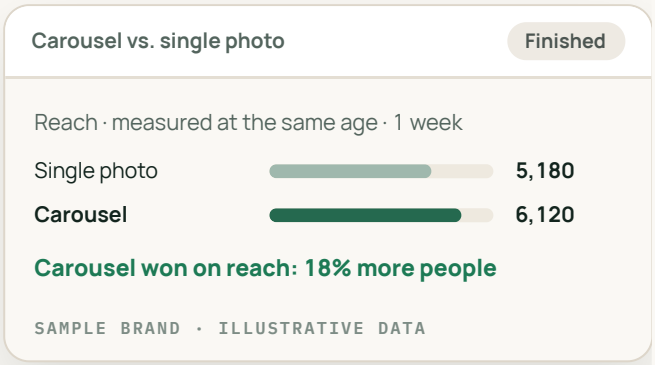
Each campaign shows its open and click rates, its bounce, unsubscribe and spam counts, and results by email domain. Brevo adds devices and browsers; Mailchimp adds opens and clicks by hour, and shop orders and revenue when available. The Email page shows performance over 30 days, 90 days or 12 months.

Experiments: *which post did better?*

A fair head-to-head test between 2 to 4 of the brand's posts. Metrix measures every post at the same age, so an older post gets no head start, and shows which one is ahead.

How it works

1. **Pick 2 to 4 posts.** The first is how you do it today; the others are what you are trying.
2. **Choose what decides the winner**: reach, views, interactions or engagement rate.
3. **Choose how long to measure**: 2 days, or 1, 2 or 4 weeks. You can also write down what you expect.
4. The clock starts when the last post goes live.
5. When you press **Finish**, Metrix suggests the post that is ahead. You confirm the winner, pick another, or choose "No clear winner"; the result is saved as **Win**, **Lose** or **Inconclusive**.



THE RULES BEHIND IT

- A lead of **under 5%** is a tie: "Too close to call".
- Posts are compared on their recorded figures: the platforms' own, plus any an editor added by hand.
- Up to ten measures are shown side by side, not just the one you picked.

FOR CREATORS

Change one thing per test, such as the format, the picture style or the caption, and keep the first post as how you do it today. Then the result tells you what made the difference.

Initiatives: *from first post to revenue*

An initiative groups the posts and ads that belong to one marketing effort, sets its targets and budget, and shows what it brought in. For example: "Fill the November barista course intake across social and ads."

Barista classes · November intake — Active — 1 OCT – 30 NOV 2026

Channel	Campaign source	Leads	Cost per lead	Cost	Enrollments	Revenue
Meta Ads	Spring blend · lead ad	142	$2.54	$360	18	$5,400
Google Ads	Search · barista course	38	$4.20	$160	6	$1,800
Total		**180**		**$520**	**24**	**$7,200**

META ROW: ADS MANAGER'S OWN FIGURES · GOOGLE ADS ROW, ENROLLMENTS AND REVENUE: ENTERED BY HAND · SAMPLE BRAND, ILLUSTRATIVE DATA

How it works

1. **Create the initiative**: a name, what the effort is for, the dates it runs and tags. Its status is Planned, Active, Completed or Cancelled.
2. **Attach posts and ads** from any channel: search posts and captions, or ads by campaign or ad set name, or add a post from its own page.
3. **Set budget and targets** per campus or location: lead targets and budgets for Meta and Google, plus enrollment and revenue targets.
4. **Add other sources** with Add a source: Meta Ads, Google Ads or Other, such as an expo.
5. **Type in enrollments and revenue** as they come in.
6. **Tag it** by course, campus or intake, and filter initiatives by tag.

THE RULES BEHIND IT

- ✓ **Leads, cost per lead and cost for Meta ads** are each ad's lifetime figures, straight from Ads Manager.
- ✓ **Enrollments, revenue** and other sources are entered by your team, and marked as entered by hand.
- ✓ Progress against targets shows as rings, and a Needs attention list flags open initiatives with no posts, dates or targets.
- ✓ Goals you don't set yourself grow with the posts you attach: for example 1,000 reach and 50 interactions per post. Goals you set are never changed.
- ✓ Initiatives hold posts and ads, not email campaigns.
- ✓ Edit or delete an initiative at any time.

FOR LEADERS
See each campaign from spend to revenue on one row, next to the plan.

FOR AGENCIES
The clearest way to show a client what your work brought in.

FOR DIGITAL MARKETERS
Attach ads as you launch them, so the totals are right from day one.

22 PART 2 · SECTION 22 · IMPROVE

Blockers, timeline *and calendar*

Blockers keep problems in view until they are fixed. The timeline and calendar show everything that happened for a brand, by time or by date.

Blockers

- Note anything slowing the work, with a short description and, if you like, a severity: Low Medium High
- Mark each blocker open, resolved or dismissed. **Dismissing one needs a short note** saying why.
- The brand Overview flags the oldest blocker **open for 14 days or more**.
- Reports show how many blockers were opened and resolved, and how long they took on average.

Timeline and calendar

- **Timeline** lists everything that happened for the brand, newest first: posts, experiments, blockers, published reports and emails.
- **Calendar** shows posts, experiments, blockers and email campaigns by date, a month at a time. Click a day to see what is on it.
- On the brand Overview's calendar card, editors can click any day from today on to plan a post for it.

23 PART 2 · SECTION 23 · IMPROVE

AI *assistant*

Click the assistant button on any page and ask about your results in your own words. It answers with your numbers, the dates they cover and where they came from.

How it works

1. It opens on the brand you are looking at, or on all your brands.
2. Ask, for example, "How did our posts do over the last 30 days?" or pick a suggested question.
3. It reads the brand's accounts, posts, figures, ad results, experiments, blockers, comments, reports and activity, and its website and email figures when you ask about them.
4. It answers with the figures, the period and the source.

THE RULES BEHIND IT

- **Only your brands.** It sees only the brands your seat allows.
- **Look, don't touch.** It can read your data but can't change anything.
- **Checks the web too**: when you are looking at one brand, it can read up to 3 web pages for public facts.
- It remembers the last 8 messages of a conversation.
- Each answer uses up to 1 AI credit. Anyone who can see a brand can ask, viewers included.

GOOD PRACTICE

The assistant is told to use only your real figures and to say when data is missing. As with any AI, check a figure on its page before you put it in a board paper.

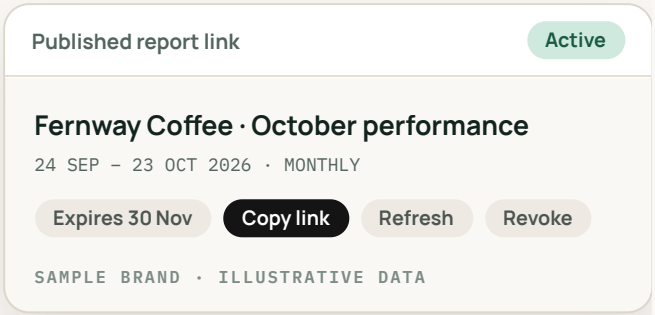
24 PART 2 · SECTION 24 · SHARE AND RUN

Reports *and shared links*

Turn results into a report you can download, or publish as a link that opens without a login. Clients and managers read it without an account, and its numbers stay put until you choose to refresh them.

How it works

1. Open a brand's **Reports** page, or the main Reports page to cover several brands.
2. **Pick the dates**: weekly (7 days), monthly (30 days), quarterly (90 days), all time, or your own dates.
3. **Choose a view**: **Overview**, **Post Performance**, **Experiment Outcomes**, **Activity Report**, or **Custom Builder**, where you pick the measures. The main Reports page adds **Websites, Email & Insights**.
4. **Download** **Export CSV**, **Export Chart Data (PDF)** or **Export Full Record (PDF)**, or **publish a link** to one brand or, from the main Reports page, all your brands.
5. When you publish, name the report and set **Expires at** if you want an end date. A brand report also lets you choose **Include signals and next steps** and **Include time and effort figures**.



THE RULES BEHIND IT

- A shared report **keeps its numbers until you press Refresh**.
- You can copy, revoke or delete a link. A revoked or expired link shows "Report unavailable".
- The Published list shows whether each link is active, expired or revoked. The report page itself shows how many times it has been viewed.
- Owners and Brand editors can publish. A link covering all brands needs that right on every brand it covers.

WHAT A PUBLISHED REPORT COVERS

Headline figures, posts over time and by platform, unpaid against paid, best and weakest posts, experiments and blockers, website figures for up to 5 sites, email results, and signals and next steps and effort figures (a brand report can leave these out).

25 PART 2 · SECTION 25 · SHARE AND RUN

Notifications

A bell at the top of every page shows new alerts, and the Notification Center lists them all. Filter by all, unread or needs attention, and switch each type on or off.

You hear about	When
Connected accounts	An account's login or permission stopped working and it needs reconnecting.

You hear about	When
Data sync	An update failed after 3 tries, it recovered, or charts are more than a day behind.
Posts	A new post or a status change, a dated post's reminder day, or a post an automatic plan had to keep as a draft.
Holidays	A holiday in the brand's country is 14 days away and nothing is planned (Owners and editors).
Initiatives and targets	An initiative is created, ends within 7 days or is overdue; a target is created or met.
Experiments	One is created or completed.
Blockers	One is created, resolved or reopened. High-severity blockers come as a warning.
Comments	Someone comments on a post or experiment.
Your access	You were added to a brand, or your access changed.
Reports	A report link is published.
Billing	AI credits fell below 25 (Owners).

THE RULES BEHIND IT

- You only get alerts for brands you can see.
- Alerts are kept for 90 days.
- **Alerts appear inside Metrix, not by email.**
- Routine edits, such as every saved change to a post, stay off unless you switch them on.

26 PART 2 · SECTION 26 · SHARE AND RUN

Plans *and AI credits*

Every workspace starts on the Free plan, with 100 AI credits a month. Only AI work uses credits: connecting accounts, seeing results, posting yourself, experiments, reports, competitor figures and page speed never use any.

Free plan
Every workspace starts here, with no end date

100 credits
Every month, for AI work

No limit
On brands, connected accounts, people or reports

What AI actions cost

AI action	Up to
One assistant answer	1
One content plan run (a batch of ideas)	2
One post caption	1
One image (post picture or blog cover)	2
One blog topic read	2
One duplicate check	1
One blog article	3
Email subject lines	1
One email draft	2
Find competitors (one search)	1
A competitor's written profile	1
Competitor strengths and next steps	1

THE RULES BEHIND IT

- A content plan run costs up to 2 credits, plus a caption and a picture for each post it writes.
- Monthly credits arrive at the start of each calendar month. Any left unused end with the month.
- **Extra credits never expire.** Monthly credits are used first.
- **No charge if it fails.** A failed or empty attempt is free, and a news read that finds nothing new costs nothing.
- When fewer than 25 credits are left, Owners get an alert.
- If credits run out, AI features pause with a message that the workspace has no AI credits left. Everything else keeps working.
- Owners see the plan, the credit balance, what things cost and the credit history on the Plan & Usage page.
- For **larger plans and extra credits**, talk to the Metaveo team.

27 PART 2 · SECTION 27 · SHARE AND RUN

Your data, *privacy and control*

Metrix mostly reads from your accounts. It only posts, sends or pauses something when someone on your team asks it to, and you can remove your data at any time.

What Metrix changes on your accounts

- **Posts** only what you create, schedule or plan, or a plan you set to post by itself.
- **Sends emails** only when an Owner says so. Brand editors can send test emails, only to people in the workspace.
- **Pauses or restarts an ad** only when you ask.
- **Works in your email tool** when you do things in Metrix: creates, edits and deletes campaigns (deleting a draft in Metrix deletes it in Brevo or Mailchimp too), uploads pictures, adds, removes, imports or unsubscribes contacts, and creates lists.
- **Sets up a Brevo webhook** when you connect Brevo, so email results arrive within minutes.
- **Turns on live updates** for a Facebook Page you connect, so new posts arrive within a minute. You can

What Metrix keeps

- Each workspace's data is **kept separate** from other customers.
- People see only the brands their seat allows.
- **Facebook comments** are read live and never stored.
- **Email contacts** stay in your own Brevo or Mailchimp account.
- Signing in with Google shares only your name, email address and profile picture.

turn them off.

- **Never deletes** your Facebook or Instagram posts.

Removing your data

To remove	Do this
One account	Disconnect it on the brand's Accounts page. Metrix's access is deleted and updates stop; data already collected stays.
A whole brand	An Owner deletes it, typing "DELETE" and the brand's name to confirm. Everything belonging to the brand is removed for good; the workspace and its people stay.
Your own account	Delete it from your profile page by typing "DELETE". Owners: make sure another Owner remains first.
Data collected from Meta	Email hello@metaveo.ai with the subject "Metrix data deletion request", or follow the public data deletion page. You don't need a login. Metaveo deletes the data Metrix collected from Meta for the account you name within 30 days and emails you when it is done.

GOOD TO KNOW

Removing Metrix in your Facebook or Instagram settings stops new data coming in, but doesn't erase what is already stored. To erase it, delete the brand or send a data deletion request.

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PART 3 OF 4

Metrix from *your seat*

The same product looks different to a CEO, an agency account manager, a social media manager, a designer and an analyst. Each section here starts from that person's questions and shows the parts of Metrix that answer them, with a routine they can follow.

28	For leadership	The big picture in ten minutes a week
29	For agencies	Many clients, one workspace
30	For digital marketers	The daily, weekly and monthly rhythm
31	For creators	On-brand drafts, then what landed
32	For business analysts	Lineage, caveats and reconciliation

For *leadership*

Leaders don't need every number. They need to know which brands are growing, whether the money is working, what is going wrong, and where to step in. Metrix answers those questions on a few pages, whenever you want to look, without anyone building a spreadsheet first.

Your questions, and where Metrix answers them

You ask	Where to look	What you get
How are all our brands doing?	Dashboard; all-brands Reports	Every brand together: posts by brand, platforms used, a posting heatmap, running experiments, open blockers and recent team activity. The Reports page covers several brands in one report.
Is one brand growing or slipping?	Brand overview	Reach, interactions, views and posts published for 7, 30 or 90 days, each against the period before.
Is our ad money working?	Posts › Paid ads; Initiatives	Campaigns, ad sets and ads with Meta's own results and amount spent, and each ad's cost per result on its page. Initiatives add leads, cost per lead, enrollments and revenue for each campaign source.
What is going wrong?	Signals; Blockers; Notifications	Falls flagged by rule, blockers open for 14 days or more, and alerts when an account stops updating.
Are we ahead of our competitors?	Competitors	How many comparison areas you lead, trail or tie in, your biggest win and your biggest gap.
Is our website doing its job?	Website; Page speed	Visitors, where they came from, key actions and sales, which posts sent visitors, and how fast the site is against competitors' sites.
Can I share the results right now?	Reports	A report link for one brand or all of them, published whenever you need it: Weekly (7 days), Monthly (30), Quarterly (90), All-time or your own dates. Refresh brings a Weekly, Monthly, Quarterly or All-time link up to today; for your own dates, publish a new link.
Is the team's effort paying off?	Effort and return; Initiatives	Estimated hours spent on artwork and the interactions each hour brought; progress of each campaign against its targets.

A ten-minute weekly routine

1. **Dashboard (2 min).** Scan the tiles and the posting heatmap. A drop in posting across your brands shows up straight away.
2. **Brand overviews (4 min).** For each key brand, read the Negative signals and the **Recommended next** list.

Ask your team for four habits

- ✓ **One initiative per campaign**, with targets and a budget, so every campaign is judged as one piece of work.
- ✓ **A report link per brand that the team refreshes on a set day**, for example every Monday, so the same link always shows current results in the same shape. You can still publish your own whenever you need one.

3. **Initiatives (2 min).** Check progress against targets, and the **Needs attention** list for campaigns missing posts, dates or targets.
4. **Ask the assistant (2 min).** For example: "What changed most in the last 7 days?" It answers with figures, dates and sources.

Need results for a board meeting or an investor call? With an Owner seat, publish a report link yourself in a few minutes, for any dates, or press Refresh on a Weekly, Monthly or Quarterly link you already shared. Nothing waits for month end, and nobody has to build a deck.

- ✓ **Blockers logged** when work is stuck, so problems are visible before they cost results.
- ✓ **An experiment before a big change** in format or style, so the decision rests on a fair test.

Decisions Metrix helps you make

BUDGET

Compare results and amount spent across campaigns and ad sets in Meta's own figures, then move money in Ads Manager to what costs less per lead or conversation. Pause a weak ad from its page in Metrix.

CONTENT MIX

Best and weakest posts, post verdicts and experiment results show which formats earn reach and interactions. Ask for more of what wins.

CHANNELS

Competitor benchmarking shows where rivals post more often or engage better, and the website figures show which platform sends real visitors.

TEAM FOCUS

Open blockers, effort and return, and initiative progress show where the team is stuck and where its hours pay off.

THE RIGHT SEAT FOR A LEADER

With an **Owner** seat you see every brand and can publish, refresh or turn off (**Revoke**) report links whenever you like, add people and send emails. A **Workspace viewer** seat suits leaders who only read: it sees every brand and can ask the assistant, but can't publish or change anything.

READ NUMBERS THE RIGHT WAY

"Visits after this post" is a strong clue, not proof that a post caused every visit. Enrollments and revenue in initiatives, and any numbers added by hand on a post, are typed in by your team. Effort hours are Metrix's estimate.

29 PART 3 · SECTION 29

For *agencies*

An agency runs many clients at once, each with its own accounts, its own people and its own idea of a good report. In Metrix every client is a brand in your agency's workspace, each client sees only their own brand, and reports go out as links.

Plan your seats

Person	Seat	Why
Agency owner or director	Owner	Adds brands and people, manages credits, sees Recent Activity, and is the only seat that can send emails.

Person	Seat	Why
Account manager	Brand editor or Owner	A Brand editor on their own clients does almost everything, including connecting accounts, posting, pausing ads and publishing report links. Only Owners send emails, and Owners see every client.
Freelancer or designer	Brand editor	Works only on the brands given to them and never sees your other clients.
Client marketing lead	Brand editor or Brand viewer	An editor seat if they post or connect their own accounts; a viewer seat if they only follow results.
Client executive	Brand viewer	Sees their own brand only, and can ask the assistant about it. Often a report link is all they need.

Onboard a client in one sitting

1. **Add the brand** (Owner) and set its country in Settings, so the right holidays are suggested.
2. **Connect the accounts.** If the client owns the Facebook Page and ad account, give their contact a Brand editor seat so they can connect them; an Owner can change the seat to viewer later. Connect Google Analytics so Page speed knows the site.
3. **Set the brand style**: up to 6 brand colours and a mood board of reference pictures.
4. **Add up to 5 competitors**, or accept suggested ones.
5. **Start a content plan** in Suggest and write mode, so every post is checked before it goes out.
6. **Create the first initiative** for the client's current campaign, with targets and budget.

Report without the busywork

- ✓ **Publish a report link** for each client. It opens without a login, so the client doesn't need an account.
- ✓ **Set an end date** or turn the link off at any time. A turned-off link shows "Report unavailable".
- ✓ **The numbers stay as published** until you press Refresh, so a client never sees a figure change under them.
- ✓ **See whether it was read**: the report page shows how many times it has been viewed.
- ✓ **Choose what to show**: leave out signals or effort figures for a client who doesn't need them.
- ✓ **Download a PDF or CSV** for clients who want a file.

Show your clients the value you add

CAMPAIGN RESULTS

Initiatives show leads, cost per lead and cost for each Meta ad, straight from Ads Manager, next to the enrollments and revenue the client reports.

PROOF, NOT OPINION

Experiments compare formats fairly. Visits after each post show which posts were followed by more visits to the client's website.

CONTEXT

Competitor benchmarking and page speed show where the client stands in its market, and where you can win next.

PLAN YOUR CREDITS

AI credits belong to the workspace, so all clients share one pool. Owners get an alert when fewer than 25 are left. Posting by hand, reports, experiments and competitor figures use no credits.

KNOW THE LIMITS

Metrix carries Metrix branding; there is no white-label option. There is no client sign-off step inside Metrix, so agree approvals with the client before you switch a plan to post by itself.

For *digital marketers*

For the digital marketers who plan, post, manage ads and write emails every day, Metrix brings the results and the tools to act on them into one place. Here is a rhythm that works, and the pages each kind of digital marketer will use most.

A working rhythm

When	Do this	Where
Daily	Clear the alerts: accounts to reconnect, posts an automatic plan kept back, plan drafts waiting to be checked. Publish or schedule the drafts you approve.	Notifications; Posts; Content plans
Weekly	Read the brand's signals and act on one next step. Look at verdicts on last week's posts. Check the paid tree, and pause weak ads from their own page.	Brand overview; Posts; Paid ads
Weekly	Look at which posts sent visitors to the website, and plan more like them.	Website; post pages
Monthly	Publish the report link. Review each initiative against its targets. Start one new experiment.	Reports; Initiatives; Experiments
Monthly	Read competitor insights: when rivals post, the hashtags they use that you don't, and their best posts. Check page speed after any site change.	Competitors; Page speed
Quarterly	Look ahead at holidays and launches and set up dated posts. Refresh the content plan brief and mood board.	Content plans; Dated posts

The pages you will use most

SOCIAL MEDIA MANAGER

Posts, Create post, Content plans, Calendar. Use the "Suggest and write" plan mode for a steady flow of drafts, and the calendar to see gaps. Best habit: check each post's verdict after a week.

CONTENT AND BRAND LEAD

Content plans, Mood board, Blog studio, Experiments. Keep the brand colours and mood board current so AI designs look right. Best habit: test one format change a month.

PERFORMANCE MARKETER

Paid ads, Initiatives, Website. Read results at campaign, ad set and ad level in Meta's own figures. Best habit: attach every campaign's ads to an initiative with a lead target and budget.

EMAIL MARKETER

Email campaigns, Contacts, Website. Use Write with AI for subject lines, always send a test first, and watch the website visits each email brings in.

Habits that make results better

- ✓ **Wait a week before judging a post.** Its verdict says "Too early to call" in the first week for a reason.
- ✓ **Test one thing at a time.** Keep the first post in an experiment as "how we do it today".
- ✓ **Use dated posts for anything with a date**: launches, events, intakes, holidays.
- ✓ **Tag initiatives** by course, product, campus or intake, so you can filter them later.

- **Space out important posts.** Metrix warns when posts are too close together to tell their website effects apart.
- **Ask the assistant for the first draft of a summary**, then check the figures it quotes on the page.

31 PART 3 · SECTION 31

For *creators*

Designers, content creators and copywriters make the posts people actually see. Metrix turns the team's brief into post ideas, keeps the brand's look in one place, hands over a first draft from the AI and, about a week after posting, gives a plain read on how each piece did, so the next one is better.

1 · BRIEF
Tell Metrix once
A plan's brief: up to 25 topics, 20 useful links and the mood board pictures to follow.

→

2 · DRAFT
The AI writes and designs
A caption with hashtags and a square picture in the brand's colours, with its real logo.

→

3 · PUBLISH
You check and post
Fix what needs it, then publish or schedule, or let the plan post for you.

→

4 · LEARN
See what landed
Each post's verdict from about a week in, and experiments for a fair test.

Make it: pick the right tool

You need	Use	What you get
A steady flow of social posts	Content plan, in **Suggest and write**	1 to 10 ideas each time the plan runs, on the schedule you set, each written and designed and waiting for you to check and publish.
A post for a launch, event or holiday	Dated post	A reminder 1 to 14 days before. With **Write it for us**, the post is written for you. Holidays for the brand's country are suggested up to 30 days ahead.
Your own design, posted	Create post	1 to 10 pictures and a caption of up to 2,200 characters, sent with **Instant**, **Schedule** or **Save draft**.
An article for the website	Blog studio	A draft of about 900 to 1,400 words, with a cover picture. Copy the HTML into your site, or press **Promote on social** to turn it into posts.
An email	Email, **Write with AI**	5 subject lines with 3 preview lines, or a full first draft. Brand editors write and test; an Owner sends.
Two looks to compare	Experiments	2 to 4 posts measured at the same age, on the measure you choose: reach, views, interactions or engagement rate.

Check it: your questions, and where Metrix answers them

You ask	Where to look	What you get
Is it on-brand?	Brand colours; Mood board	Up to 6 brand colours and up to 50 reference pictures. AI post pictures and blog covers use the colours; post pictures also carry the brand's real logo in the bottom-right corner.
Which of my posts worked?	Posts; each post's page	Its figures and a day-by-day chart, and from about a week in, a verdict on its momentum: Still picking up, Holding steady, Past its peak or Not moving.
What did best lately?	Brand overview	The brand's 5 best and 5 weakest posts for the last 7, 30 or 90 days.
What are competitors posting?	Competitors	Their best and latest public posts, the days they post and the time of day, and hashtags they use that you don't.
What did the team say?	Team comments on a post	Comments sit next to the post they are about, so feedback doesn't get lost in chat. Only people in your workspace see them.
Is my time paying off?	Effort and return	The hours your artwork took, estimated from the brand's Time per artwork setting, and the interactions each hour brought.

A weekly rhythm

1. **Check the drafts.** Open the plan's drafts, fix any words or pictures that need it, then publish or schedule them.
2. **Look ahead.** Find gaps on the calendar, and turn upcoming launches and holidays into dated posts.
3. **Read last week's verdicts.** Note which posts are still picking up, and make more like them.
4. **Read the team's comments** on your posts, and fold the feedback into the next brief.
5. **Borrow what works.** Skim the Competitors page for formats, posting days and hashtags worth trying.

Get better drafts from the AI

- ✓ **Keep the mood board current**, and put your best pictures first when you pick them for a plan or dated post: the first 4 guide the design.
- ✓ **Set the brand colours** in the brand's Settings; without them, post pictures take their colours from the logo.
- ✓ **Write a full brief**: up to 25 topics and 20 useful links tell the AI what the brand talks about.
- ✓ **Leave** `Add the brand logo` **on** (it is on by default) unless a plan's pictures shouldn't carry it.
- ✓ **Check every draft** before it goes out, words on the picture included. The AI is asked to keep captions and headlines short, but it can run over.

THE RIGHT SEAT FOR A CREATOR

A **Brand editor** seat on the brands you work on lets you plan, design, schedule and publish posts, run experiments and leave team comments on posts. You see only the brands you are given.

GOOD TO KNOW

Metrix posts pictures, not video: 1 to 10 JPEG or PNG pictures per post, up to 8 MB each, and JPEG only on Instagram. Content plans make single-picture posts. AI drafts use the workspace's credits: up to 2 per plan run or blog topic read, then up to 1 per caption, 3 per article and 2 per picture or cover. Posting your own work uses none.

For *business analysts*

Analysts have to stand behind the numbers. This section explains where Metrix's figures come from, what each one does and doesn't mean, how to reconcile them with the platforms' own tools, and how to fit them into a measurement framework.

Five principles behind every number

- **Platform figures, not estimates.** Almost every number comes from the platform it describes, and paid results, spend and costs are exactly what Meta reports. The exceptions: figures your team types in (on a post, or enrollments and revenue in initiatives), effort hours (an estimate), and the rates, verdicts and comparisons Metrix works out from platform figures.
- **Gaps, not guesses.** A day with no reading is a gap in the chart. A figure the platform doesn't give shows as a dash or "Unavailable", never as zero.
- **Rules, not AI, for signals.** Signals come from fixed rules, so the same numbers always give the same advice, and each shows its rule and figures. The Competitors page's next steps are AI-written.
- **Published reports are snapshots.** A shared report keeps its numbers until someone presses Refresh, so two readers always see the same figures.
- **Measured and entered are kept apart.** Enrollments and revenue in initiatives are typed in by your team and labelled as such; a Meta ad's leads, cost per lead and cost come from Ads Manager.

Know what a number means

Figure	What to keep in mind	How to handle it
Reach (posts)	Added up post by post. One person who saw two posts counts twice.	Don't call total post reach "unique people". For unique people, use an ad's own reach.
Followers gained	Instagram doesn't report unfollows.	Not net growth. Track the follower count over time for that.
Email opens	Apple Mail's privacy feature opens some emails automatically.	Judge emails by clicks and the website visits they bring.
Visits after a post	All visits from that platform on the post day and the 2 days after, against an average day in the week before. Ad visits are left out.	A clue, not attribution. Trust it more when no other post went out close by.
Paid results	Counted by each ad's goal: leads, conversations or ThruPlays, the way Ads Manager counts them.	Compare results only between ads with the same goal.
Competitor "typical"	The middle competitor (the median), so one huge account can't skew it. A lead is 15% or more.	Read "you lead in 7 of 11 areas" as a position, not a score.
Experiment winner	Posts are measured at the same age. A gap under 5% is "Too close to call".	Don't act on a tie; run the test again or longer.

Figure	What to keep in mind	How to handle it
Effort hours	An estimate: 60 minutes per artwork until you set your own time.	Set the brand's real time per artwork before using it in a business case.

Reconcile Metrix with the platforms' own tools

META ADS MANAGER

- Compare the same level: campaign with campaign, ad with ad.
- Use the same dates. "Last 7 days" and similar periods end yesterday.
- Amounts are in the ad account's currency.
- Metrix shows each ad's result for the goal its ad set is optimised for.
- Late changes: each update re-checks the last 7 days.

GOOGLE ANALYTICS

- Check you are looking at the same website (property). Reports and the Website page both read Google live.
- Ready-made periods end yesterday; the last 2 days may still grow.
- Use the same date range and the same report.
- A figure Google doesn't have shows as "Unavailable".

A measurement framework you can build on Metrix

Each stage of the funnel, the question it answers, and the Metrix figures that answer it. Use it to agree KPIs with leadership before a campaign starts.

Stage	Question	Metrix figures	Where
Awareness	Did people see us?	Reach, views, impressions; ad reach and frequency	Brand overview, Posts, Paid ads
Engagement	Did they care?	Interactions, engagement rate, post verdicts	Posts, Experiments
Traffic	Did they come to the website?	Sessions, visits after a post, link clicks, landing page views, email clicks	Website, Paid ads, Email
Conversion	Did they act?	Leads, conversations started, key events	Paid ads, Initiatives, Website
Value	Was it worth it?	Website sales, ROAS, enrollments and revenue entered by your team	Website, Paid ads, Initiatives
Efficiency	What did it cost?	Amount spent, cost per result, cost per lead, CPC, CPM, effort hours	Paid ads, Initiatives, Effort and return
Position	How do we compare?	Areas led against the typical competitor; page speed scores	Competitors, Page speed

Getting data out

- **Reports** download as a PDF or a CSV file, for one brand or several.
- **Website reports** each download as a spreadsheet file.
- **Report links** give stakeholders a read-only view without an account.

Governance at a glance

- **Access** is set by four seats; nobody can give more access than they have (section 07).
- **Audit**: Owners see who changed what, and when.
- **Separation**: each workspace's data is kept apart from every other customer's.

- **The assistant** answers questions with the figures, the period and the source, which is a quick way to draft a summary.
- **Changes to your accounts** are listed in section 27: posting, sending and pausing happen only when a person asks or turns on auto-posting.

FOR REQUIREMENTS WORK

When you write requirements or a business case around Metrix, use section 07 for who can do what, section 05 for how fresh each figure is, and section 35 for what Metrix does not do today. Those three pages answer most "can it…?" questions.

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PART 4 OF 4

Reference

Step-by-step playbooks for the jobs teams do most, the main words you will see on screen, an honest list of what Metrix does not do today, and answers to the questions people ask before and after they start.

33	Playbooks	Seven common jobs, step by step
34	Words you will see	The glossary
35	Limits: what Metrix does not do	Plan around these
36	Questions people ask	Short answers

Playbooks: *common jobs, step by step*

Each playbook strings several features together to get one real job done. The seat shown is the lowest seat that can do every step.

PLAYBOOK 1 · SET UP A NEW BRAND — OWNER

1. Add the brand on the Brands page. In its Settings, set the country on the **Country and holidays** card.
2. On its Accounts page, connect Facebook & Instagram (then **Set up paid** for ad accounts), YouTube and Google Analytics. Connect Brevo or Mailchimp on its Email page.
3. In Settings, add up to 6 brand colours and your time per artwork. Upload reference pictures to the mood board.
4. Add up to 5 competitors, or use Find competitors and accept the ones that fit.
5. Invite the people who work on the brand, choosing each person's seat.
6. Start a content plan in "Suggest and write" mode.

PLAYBOOK 2 · THE MONTHLY CLIENT REPORT — BRAND EDITOR

1. Open the brand's Reports page and pick Monthly, or set your own dates.
2. Choose the view, or pick your own measures in Custom Builder.
3. Publish it. Name it, set an end date, and choose whether to include signals and effort figures.
4. Copy the link and send it. The client doesn't need a login.
5. The report page shows how many times it has been viewed.
6. Next month, publish a new report, or press Refresh to update the same link.

PLAYBOOK 3 · FIND OUT WHY REACH FELL — ANY SEAT

1. On the Brand overview, pick the period and read the change against the period before.
2. Read the Negative signals and open "How we worked this out" to see the rule and numbers.
3. Compare the 5 best and 5 weakest posts: format, platform, timing.
4. Check the publishing rhythm. Fewer posts often explains lower reach.
5. On Competitors, see if rivals post more often or at better times.
6. An editor then acts: plan more of what worked, or test it with an experiment.

PLAYBOOK 4 · A LEAD CAMPAIGN, LAUNCH TO REVENUE — BRAND EDITOR

1. Create an initiative with a name, what it is for, dates and tags, for example course, campus and intake.
2. Set lead targets and budgets per campus or location, then the enrollment and revenue targets.
3. Attach the campaign's posts and ads. Use Add a source for anything outside Meta, such as a Google Ads campaign or an expo.
4. Watch leads, cost per lead and cost fill in from Ads Manager.
5. Each week, type in enrollments and revenue as they come in.
6. Show the result from the initiative's page; reports don't include it.

PLAYBOOK 5 · PLAN A FESTIVE SEASON

BRAND EDITOR

1. Look at the holidays Metrix suggests for the brand's country and region.
2. Turn each one you want into a dated post: remind us, write it, or write and post it on the day.
3. Add your own dates too: launches, events, sales.
4. Refresh the mood board with seasonal pictures.
5. Check the Calendar for gaps and fill them from the content plan.

PLAYBOOK 6 · SETTLE A CREATIVE DEBATE

BRAND EDITOR

1. Publish the options as separate posts: for example a carousel and a single photo.
2. Create an experiment. Put "how we do it today" first.
3. Pick the measure that decides the winner, and a length: 2 days, or 1, 2 or 4 weeks.
4. Write down what you expect to happen.
5. Read the result. Under 5% apart is "Too close to call", so test again.

PLAYBOOK 7 · BENCHMARK AGAINST COMPETITORS AND SET TARGETS

BRAND EDITOR TO ADD, ANYONE TO READ

1. Add up to 5 competitors and wait for their first read: up to a year of posts.
2. Pick 90 days or 12 months for a stable view.
3. Note your biggest gap, for example posting frequency.
4. Open each platform's tab on Competitors for their best posting days and hashtags.
5. Close the gap: adjust the content plan's schedule, or set reach and engagement goals on an initiative.
6. Check the comparison again next month.

34 PART 4 · SECTION 34

Words *you will see*

Metrix's numbers come from the platforms they describe: Facebook, Instagram, YouTube, Google Analytics, Meta ads, Brevo, Mailchimp or Google PageSpeed Insights. Here is what each word means.

POSTS AND PAGES

Word	What it means
Reach	How many people saw your posts. Each post is counted on its own, so one person who saw two posts counts twice.
Views	Every view of every post. Watching twice counts twice.
Impressions	How many times a post or ad was shown on a screen. One person can see it more than once.
Interactions	Likes, comments, shares and saves, added up across all platforms.
Engagement rate	Interactions divided by reach: how often people did something after seeing a post.
Published	How many posts went out in the period.
Organic, Paid	Organic means normal, unpaid posts. Paid means ads.
Verdict	A short note on a post's direction, from its last 3 readings against the 3 before (section 11).

Word	What it means
Artwork	One design. The same design posted to several platforms within 24 hours counts once.
Page likes	People who liked your Facebook Page. This is not the same as followers.
Followers gained	New Instagram followers. Instagram doesn't report people who unfollow, so this is not net growth.

PAID ADS

Word	What it means
Campaign, ad set, ad	Meta's three levels. A campaign has a goal, its ad sets hold the budget and audience, and the ads are what people see.
Results	How many times an ad got what it was set up to get, counted the way Ads Manager counts it. For a message ad, a result is a conversation started.
Cost per result	Amount spent divided by results, as Meta works it out.
Amount spent	What Meta charged in the period, in your ad account's currency.
Reach (ads), Frequency	How many different people saw the ad at least once, and how many times each saw it on average.
CPM	What 1,000 showings of the ad cost, on average.
Link clicks, CPC, CTR	Clicks on the ad's link, the cost of each click, and the click rate (1% means 1 click for every 100 showings).
Leads, cost per lead	Forms filled in on Facebook or Instagram, plus leads Meta tracked on your website, and what each one cost.
Landing page views	People who clicked and stayed until your page finished loading.
Messaging conversations started	Chats started on Messenger, Instagram or WhatsApp.
ThruPlays	Video plays of at least 15 seconds, or of the whole video if it is shorter.
ROAS	Return on ad spend. 2 means every 1 spent brought back 2 in sales.

WEBSITE AND EMAIL

Word	What it means
Sessions	Visits. A visit ends after 30 minutes with no activity.
Active users	Visitors who stayed 10 seconds or more, opened 2 or more pages, or did something important such as sending a form.
Engagement rate (website)	The share of visits where people did one of those things. Bounce rate is the opposite; lower is better.
Key events	Important actions, such as a form sent, a call button tapped or a purchase. Google used to call these conversions.

Word	What it means
Visits after a post	Visits a platform sent to your website on a post's day and the 2 days after, compared with an average day in the week before (section 13).
Opens, open rate	People who opened the email. Apple Mail's privacy feature can count some opens automatically, so this can read a little high.
Clicks, bounces, unsubscribes, spam complaints	Link clicks in the email, emails that could not be delivered, people who opted out, and people who marked it as spam.

SIGNALS, COMPETITORS AND PAGE SPEED

Word	What it means
Signal	Something Metrix noticed in the numbers by applying a fixed rule, filed as Negative ("Needs attention"), Neutral ("Worth knowing") or Positive ("Working well").
Recommended next	Up to 5 next steps, in order, each with the reason and the rule behind it.
Typical competitor	The middle competitor (the median) for an area: half do better and half do worse.
Lead, gap	You lead an area when you are at least 15% better than the typical competitor, and trail it (a gap) when you are at least 15% worse.
Engagement per follower	A typical post's likes and comments (plus shares on Facebook) per follower, the middle value across its posts in the period, so big and small accounts compare fairly.
Longest gap between posts	The longest stretch with no post in the period.
Performance score	Google PageSpeed's 0 to 100 speed score from one lab test. 90 to 100 is good, 50 to 89 needs improvement, 0 to 49 is poor.
Core Web Vitals	Google's three measures of what real Chrome visitors experienced over 28 days: **LCP**, how long until the main content appears (good is 2.5 seconds or less); **INP**, how quickly the page reacts to a tap or click (good is 200 ms or less); **CLS**, how much the layout jumps while loading (good is 0.1 or less).

CAMPAIGNS AND CREDITS

Word	What it means
Initiative	One marketing campaign tracked as a whole: its posts, ads, targets, budget and results (section 21).
Campaign source	One row of an initiative's results: a Meta ad, or a source you add yourself such as a Google Ads campaign or an expo.
Entered by hand	A figure your team typed in, such as enrollments or revenue, as opposed to one read from a platform.
Report link	A published report that opens without a login. Its numbers stay as published until someone presses Refresh.
AI credit	The unit AI features use. The Free plan includes 100 a month; extra credits never expire.

Limits: *what Metrix does not do*

Knowing the edges of a product is as useful as knowing its features. These are the things Metrix does not do today, so you can plan around them, and what to do instead.

Area	Metrix does not…	What to do instead
Platforms	Collect results from LinkedIn, X, TikTok, Google Ads, Google Search Console or website platforms such as WordPress. LinkedIn and X can be listed by hand, but nothing is collected.	Add their campaign results to an initiative with **Add a source**.
Instagram only	Post, show ads or read competitors through an Instagram-only login.	Link the Instagram account to a Facebook Page and use **Connect Facebook & Instagram**.
Posting	Post video, or post anywhere other than Facebook and Instagram. Instagram takes JPEG pictures only.	Post videos in the platform's own app; Metrix still collects their figures.
Tracking links	Add UTM tags to social posts, content plans or blog articles. Only email links are tagged.	Read "visits after a post" as a clue; add your own tags to links that need exact tracking.
Attribution	Prove which post or ad caused a sale or visit. Initiatives show Meta's own lead figures; enrollments and revenue are typed in.	Agree with leadership which figures count as proof before a campaign starts.
Approvals	Offer a client sign-off step for posts or reports.	Use "Suggest and write" mode and agree approvals outside Metrix.
Alerts and reports by email	Email alerts to your team, or send reports on a schedule.	Check the bell in Metrix; publish a report link and send it yourself.
Blog publishing	Publish articles to your website.	Copy the HTML into your website yourself.
Branding	Offer a white-label version with your agency's branding.	Share report links, which open without a Metrix login.
Account history	Show Page figures for Facebook Pages with fewer than 100 followers (Facebook holds them back), or load more than about 90 days of day-by-day account history from before you connected (30 for Instagram).	Connect accounts early; daily history keeps building from then on.
Competitors	Read private accounts, or more than 5 competitors per brand. Facebook competitor Pages need Meta's approval of Metrix's access to public Page content; until then the Facebook view says so.	Compare on Instagram and website figures meanwhile.
The AI	Let the assistant change anything (it only reads), or guarantee exact lengths for articles and captions.	Check AI drafts before publishing, as you would any writer's.

WHY THIS PAGE EXISTS

Metrix is updated often, and some of these limits will go. This list describes Metrix on 9 November 2026. If one of these matters to your decision, ask the Metaveo team what has changed since.

Questions *people ask*

Short answers to the questions that come up most, before and after a team starts with Metrix.

Do clients need a Metrix login to see their report?
No. A published report link opens without a login. You can set an end date or turn it off at any time.

Will the ad figures match Meta Ads Manager?
Yes. They are Meta's own figures, in the ad account's currency. If they look different, check you are comparing the same level (campaign, ad set or ad) and the same dates.

How fresh are the numbers?
Every account updates automatically, so nobody exports or copies numbers. New Facebook posts arrive within about a minute with live updates on. The Website page, the Overview's paid headlines and an opened ad are read live.

Why does a figure show a dash or "Unavailable"?
The platform didn't report it. Metrix shows a gap rather than a guess or a false zero.

Can Metrix delete or change our posts?
No. Deleting a post in Metrix only removes it from Metrix. The only change Metrix makes to an ad is pausing or restarting it, when someone asks.

Can Metrix post for us automatically?
Yes, if you choose "Suggest, write and post" on a content plan and tick to agree, or "write it and post it on the day" for a dated post. Otherwise nothing goes out without a person.

What happens when AI credits run out?
AI features pause with a message that the workspace has no AI credits left. Everything else keeps working. A failed AI attempt never uses credits.

Can one ad account serve several brands?
Yes. Each brand keeps its own rows, and removing the ad account from one brand leaves it on the others.

Can a client see our other clients?
No. A Brand viewer or Brand editor sees only the brands given to them.

Is our data kept apart from other customers?
Yes. Each workspace's data is kept separate, and people see only the brands their seat allows.

Does Metrix store our website data?
The Website page reads Google live. For reports and the Dashboard, Metrix saves 11 daily website figures, such as sessions and active users, starting about 90 days before you connected.

What if an account disconnects?
Its card shows "Reconnect required" and a Reconnect button, you get an alert, and posts waiting for it are marked "Needs you to look".

Does it work for LinkedIn or TikTok?
Not today. See section 35 for what to do instead.

How do we remove our data?
Delete a brand, or email hello@metaveo.ai with the subject "Metrix data deletion request" (section 27). Disconnecting only stops new data.

TALK TO US

Start on the Free plan at **metrix.metaveo.ai**. For plans, extra credits, a demo or a question this manual doesn't answer, email **hello@metaveo.ai**.