Actions

User Guide

Reputation

2025

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1 | Actions Overview

Actions Overview

Centralize ticket management and automate workflows with role-based dashboards the team can access at their desk or on the go.

The **Actions** module displays tickets that have been created from customer feedback and allows teams to track the resolution timeline for taking action on the feedback. Defining team workflows within Actions ensures a consistent resolution for every issue, no matter which channel it was received in.

Actions Configuration

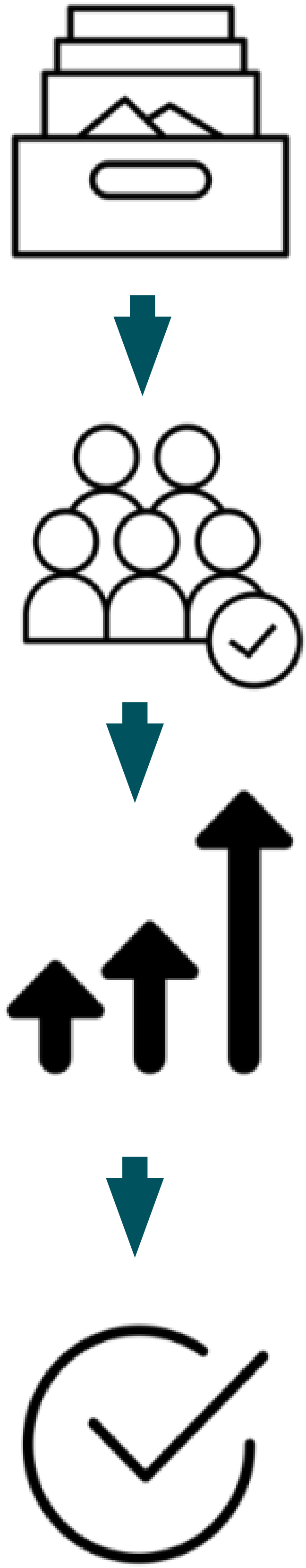
Before using **Actions**, define the workflow to apply to the ticket details. Workflows refer to the various labels used to track a ticket through resolution.

Additionally, set automation rules to determine how tickets are created or updated and what labels are applied to the ticket. Defining a targeted set of rules for ticket creation and updates is important to response efficiency.

Actions Workflow

Regardless of how the ticket is created (automatic or manual), it's important to accurately provide progress updates in the ticket detail. Each ticket includes fields to describe what the ticket is about, who is working on the ticket, what stage the ticket is in, what the expected resolution time is, and other ticket metadata. These fields and automatic alerts track the activity throughout the resolution process.

Actions Workflow Example: Automotive



1. Collect

Create tickets for:

- Negative reviews.
- Reviews with a comment.
- Surveys where the experience was “Below expectations.”

2. Assign

All tickets are assigned directly to managers with a due date of 12 days.

3. Escalate

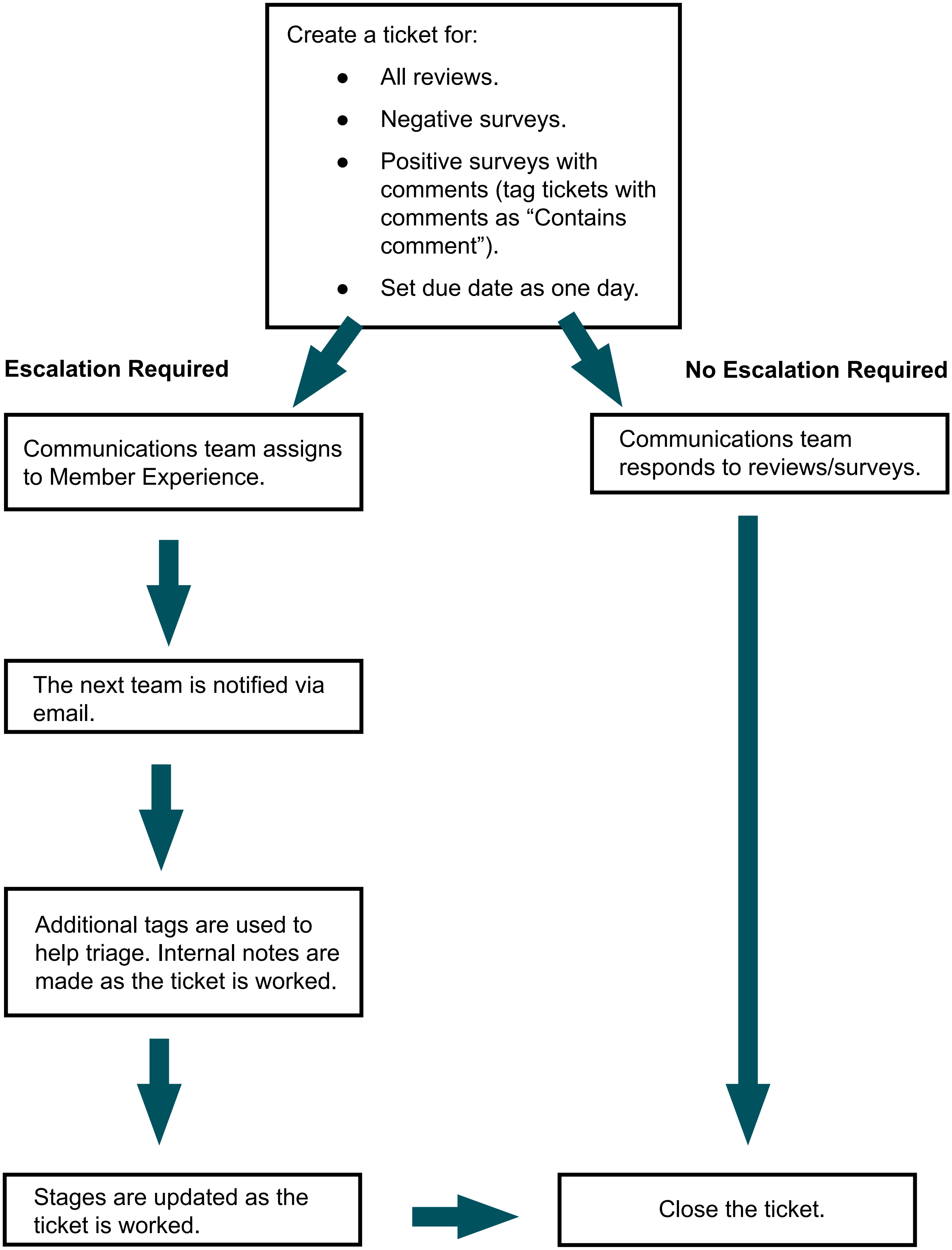
Managers receive a reminder email at 4 days.

Managers receive an overdue email at 12 days.

4. Resolve

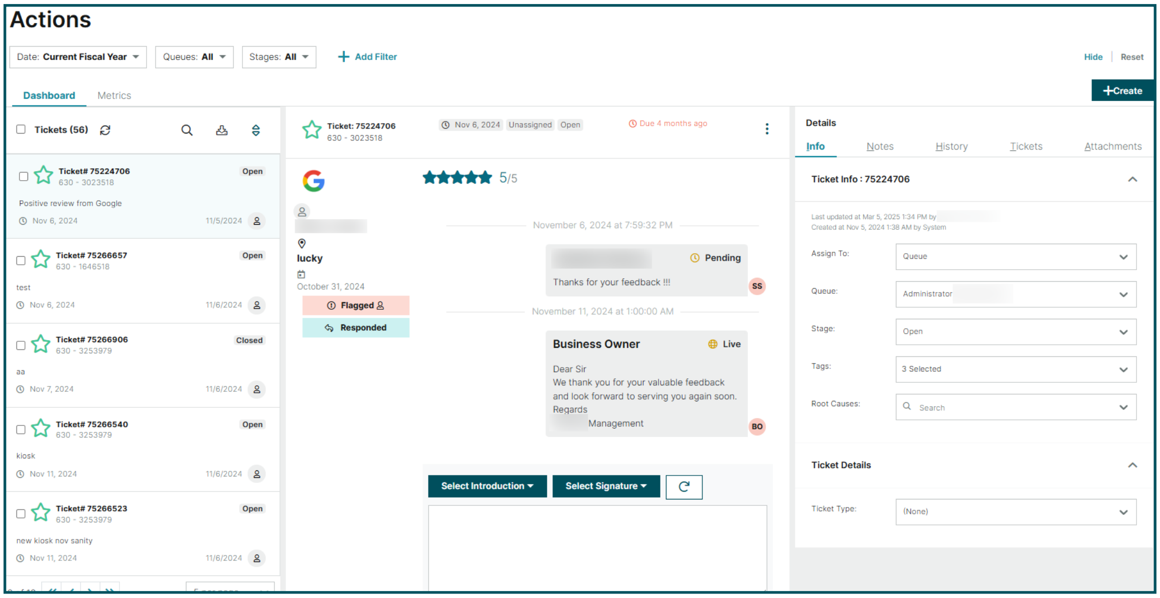
Managers respond and close the tickets.

Actions Workflow Example: Healthcare



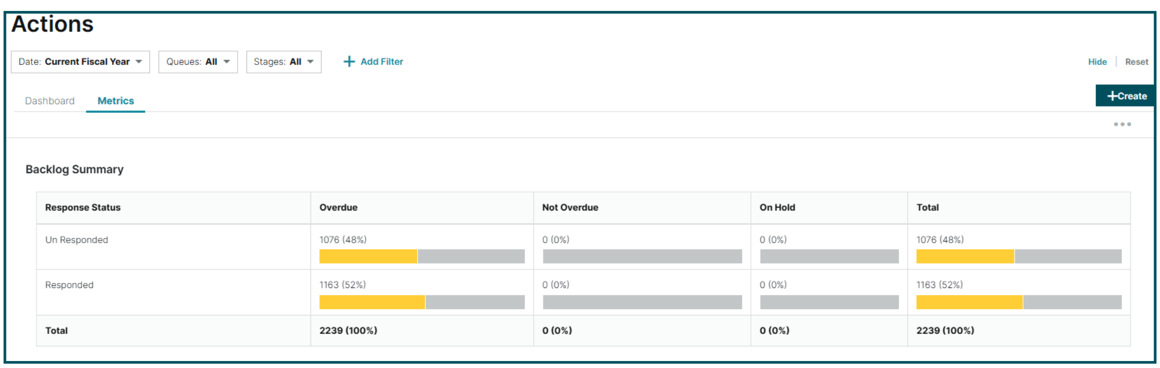
Actions Dashboard

The **Actions Dashboard** tab displays all the tickets for all the accessible locations. Filter, sort, search, and apply bulk actions to tickets. Bulk actions can assign tickets, as well as close, tag, postpone, delete, and more.



Actions Metrics

The **Actions Metrics** tab displays interactive charts and graphs to investigate trends in tickets and resolution efforts.



2 | Configure Actions

Configure Actions

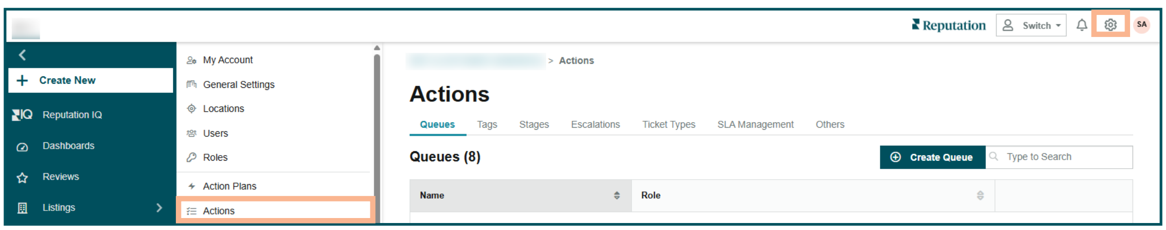
Use customizable business rules to build and automate ticketing workflows to ensure the right people are notified immediately when a ticket is created.

Define Actions Workflows

Workflows refer to the labels used to track a ticket through resolution. Filter tickets with these labels and use them to build automation rules.

To define the workflow:

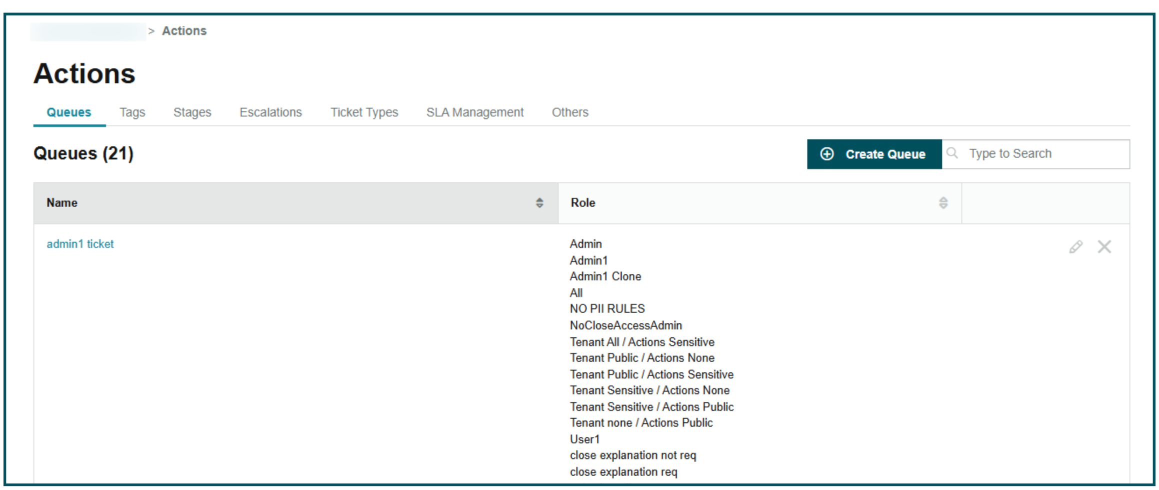
1. From the top, right corner of the platform, click **Settings**.



2. From the left navigation menu, click **Actions**.
3. Use the tabs at the top to create the following: Queues, Tags, Stages, Escalations, Ticket Types, SLA (Service Level Agreement) Management, and Others.

Queues

Create queues to assign to a ticket. Certain users (roles) may be responsible for handling the tickets in certain queues.

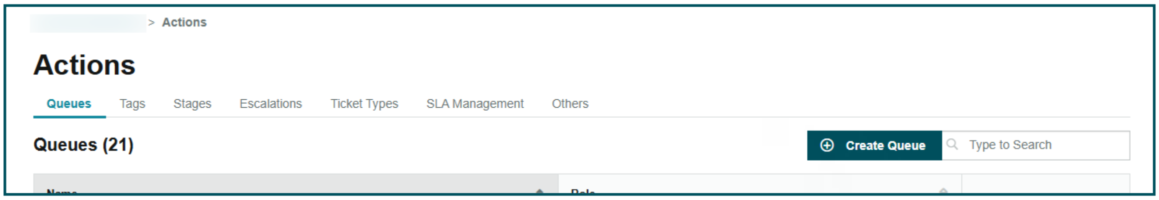


Under the **Queues** tab, the queue is listed with the assigned roles. Click the pencil icon to edit a queue or the x icon to delete a queue.

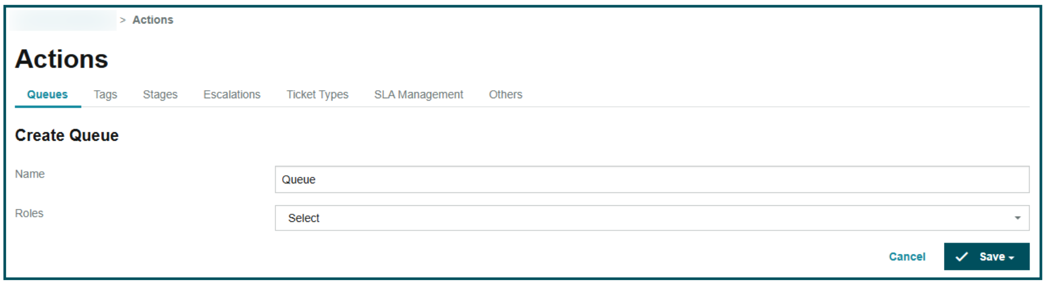
Note: Before a queue is created, ensure all the roles that will be included in the queue have already been created. Roles cannot be added to the queue retroactively. For more information about roles, see the Admin User Guide.

To create a queue,

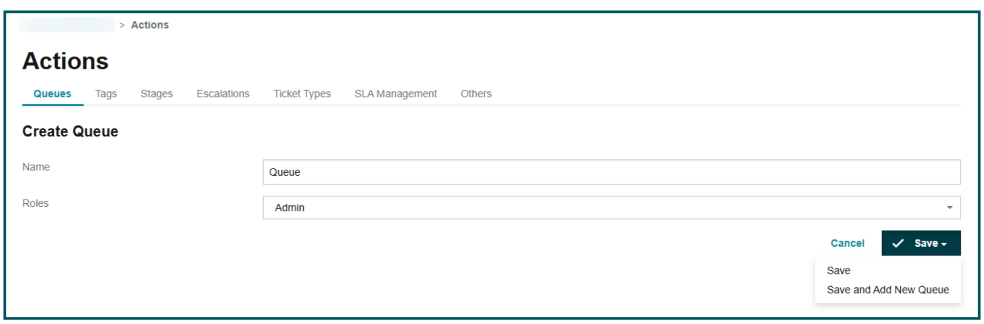
1. Under the **Queue** tab, click **Create Queue**.



2. Name the queue.



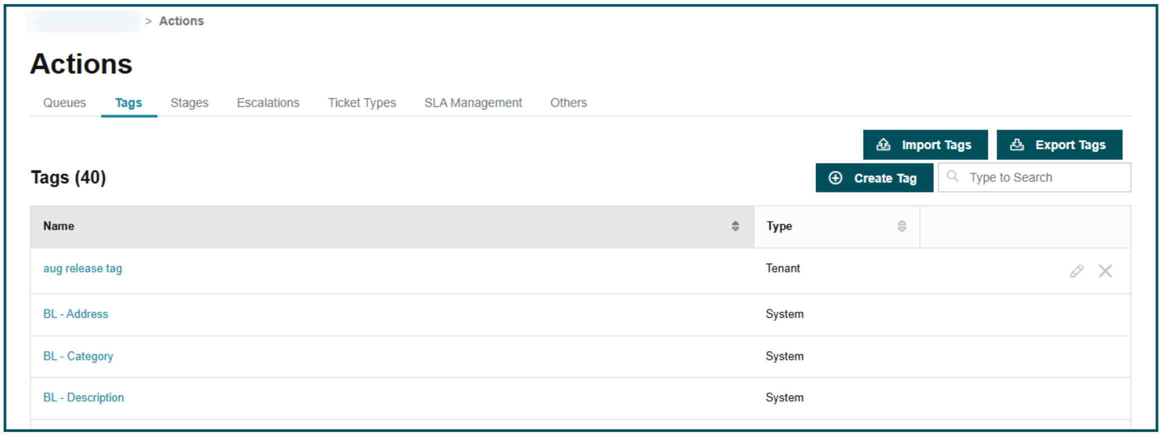
3. Use the **Roles** dropdown to assign the roles to the queue.
4. Click **Save**.
   a. Click the dropdown on the **Save** button to click **Save** or **Save and Add New Queue** to start creating a new queue after the current one is complete.



Tags

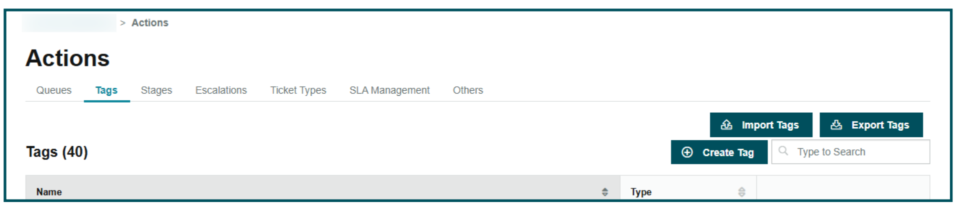
Tags can be used to filter tickets, create ticket reports, set automation rules, create survey requests, and update tickets to assign them to a queue, user, or stage.

Create tags to describe the contents of a ticket. Create a report of the tags to understand the nature of customer feedback.

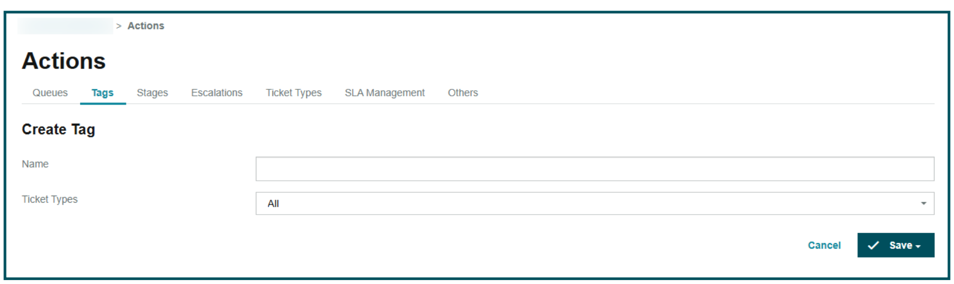


Under the **Tags** tab, view a list of tags and the level they can be used at (tenant or system). Click the pencil icon to edit a tag or the x icon to delete a tag.

1. Click **Create Tag**.



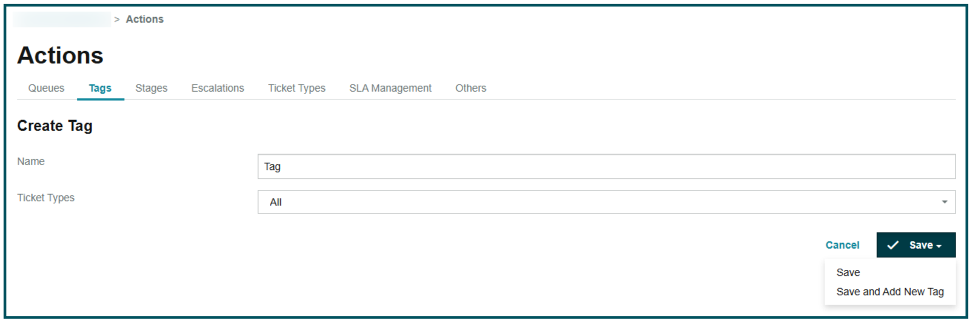
2. Name the tag.



3. Select the **Ticket Type**.

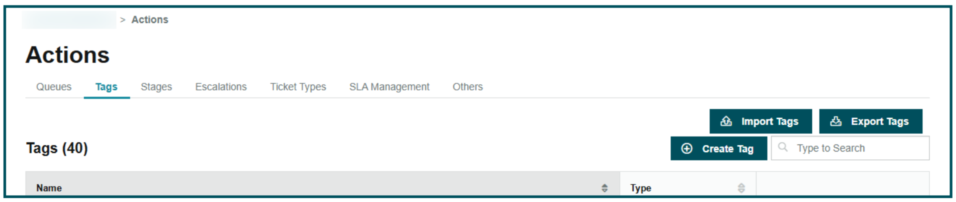
   - To create or edit a ticket type, see Ticket Types on page 15.

4. Click **Save** or click the dropdown to select **Save and Add New Tag**.

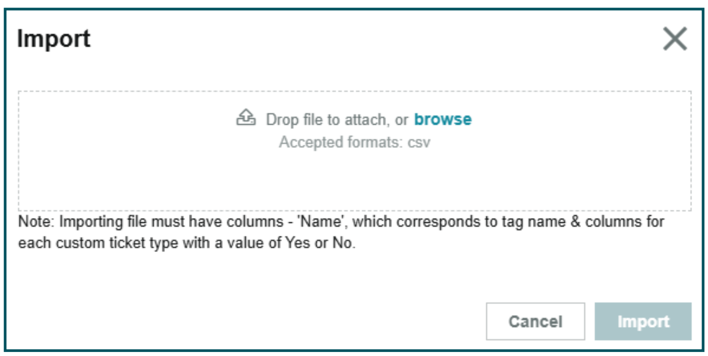


5. Return to the **Tags** page to import or export tags.

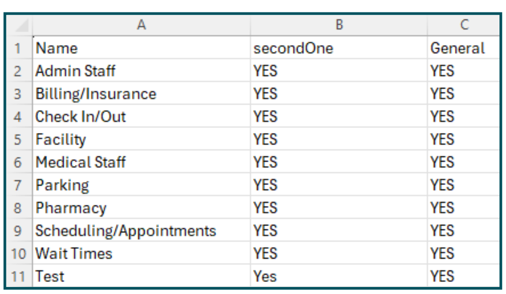
   a. Click **Import Tags** to import a CSV list of tags.



      i. Drag and drop a .csv file or click browse to select a .csv file to upload.



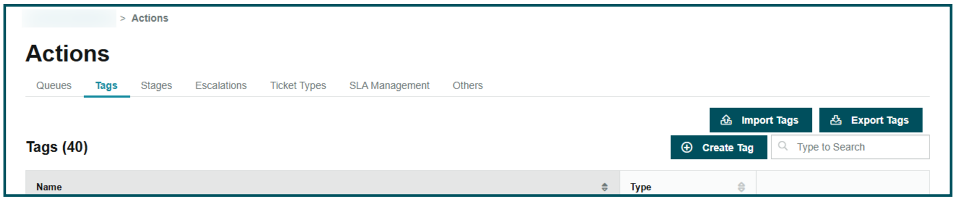
         ▪ The list must have a Name column and a column for each ticket type with a Yes or No in each row.



	A	B	C
1	Name	secondOne	General
2	Admin Staff	YES	YES
3	Billing/Insurance	YES	YES
4	Check In/Out	YES	YES
5	Facility	YES	YES
6	Medical Staff	YES	YES
7	Parking	YES	YES
8	Pharmacy	YES	YES
9	Scheduling/Appointments	YES	YES
10	Wait Times	YES	YES
11	Test	Yes	YES

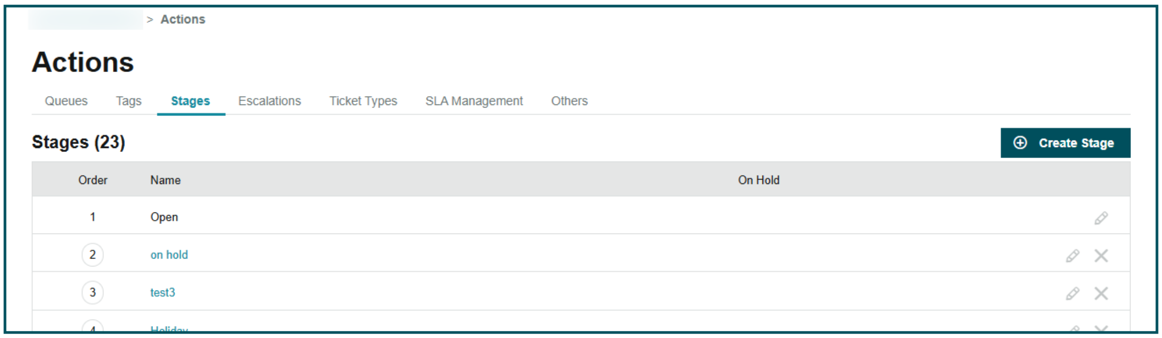
      ii. Click **Import**.

b. Click **Export Tags** to export a CSV list of the tags.



Stages

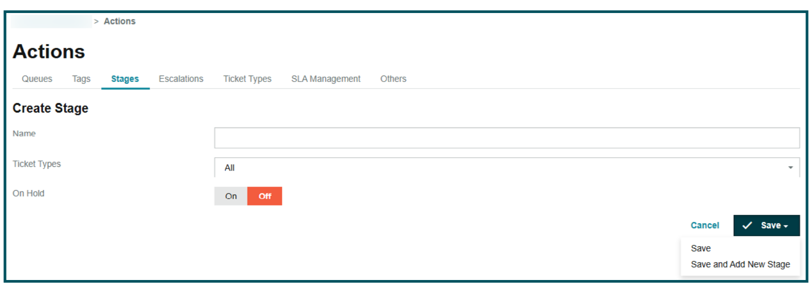
Create the stages available during a ticket's life cycle as they are moved between queues. The default ticket stages are Open and Closed. Add, delete, rank, and rename additional stages that support the internal business process.



Put the ticket on hold within each stage to stop the clock tracking the total resolution time.

Under the **Stages** tab, view a list of the ticket stages and if they are On Hold. Click the pencil icon to edit a stage or the x icon to delete a stage.

1. Click **Create Stage**.
2. Name the stage.

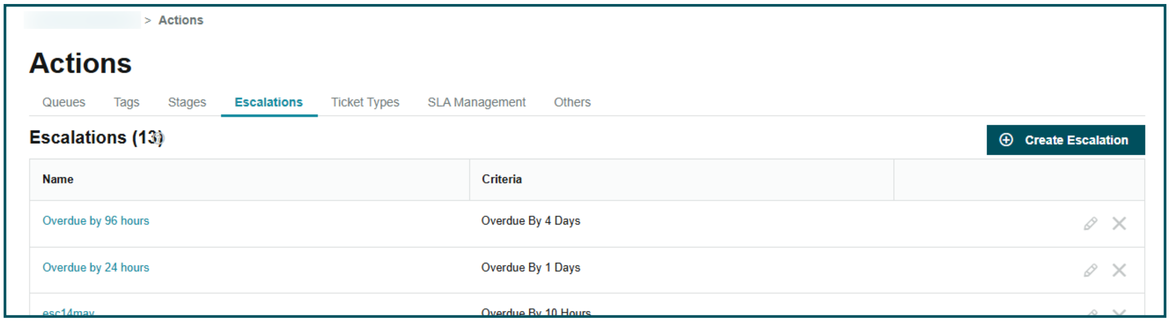


3. Select the **Ticket Type**.
   - To create a ticket type, see the Ticket Type tab. For more information, see Ticket Types on page 15.
4. Click **On** to put the stage on hold, if needed.
5. Click **Save** or click the dropdown to select **Save and Add New Stage** to immediately begin creating a new stage.

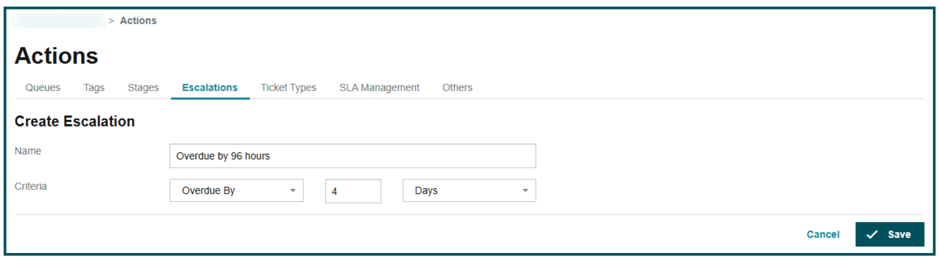
Escalations

Create escalation labels based on the number of hours a ticket is overdue by or due within.

Under the **Escalations** tab, view a list of the escalations and their criteria. Click the pencil icon to edit an escalation or the x icon to delete an escalation.



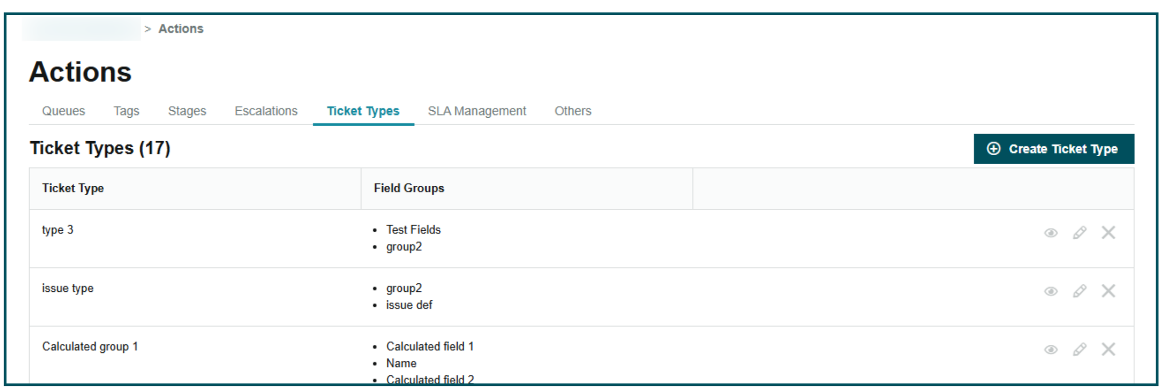
1. Click **Create Escalation**.



2. Name the escalation.
3. Set the criteria for the escalation.
   a. Select **Due in** or **Overdue by**.
   b. Enter a number.
   c. Select **Hours**, **Days**, **Weeks**, or **Months**.
4. Click **Save**.

Ticket Types

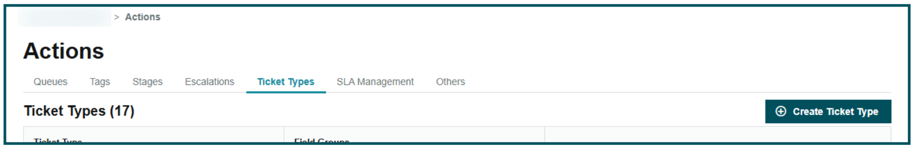
Create additional context details based on the type of customer feedback. Assign tickets to groups to easily organize and prioritize the tickets.



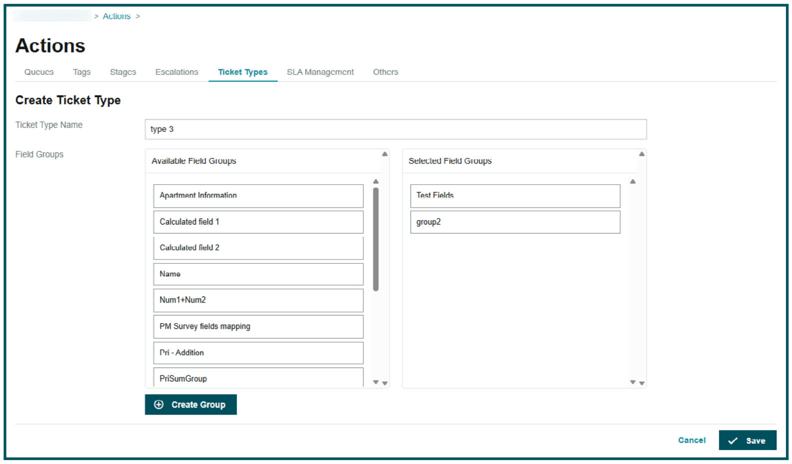
Under the **Ticket Types** tab, view a list of the ticket types and their field groups.

Click the pencil icon to edit a ticket type or the x icon to delete a ticket type. Click the eye icon to preview the ticket type to ensure it is correct.

1. Click **Create Ticket Type**.



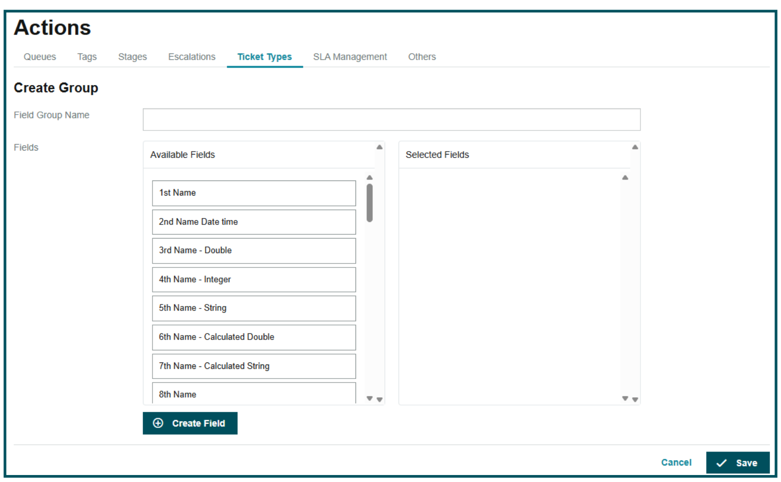
2. Enter the **Ticket Type Name**.



3. Drag and drop the Field Group(s) from the **Available Field Groups** to **Selected Field Groups**.

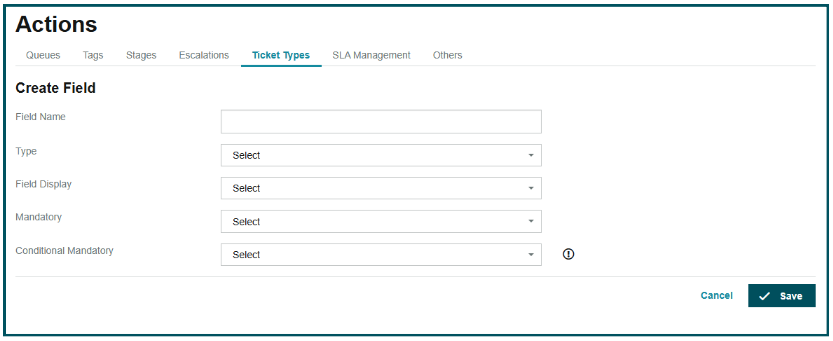
4. To create a new field group, click **Create Group**.

5. Enter the **Field Group Name**.



6. Drag and drop the field(s) to include in the group under **Selected Fields**.

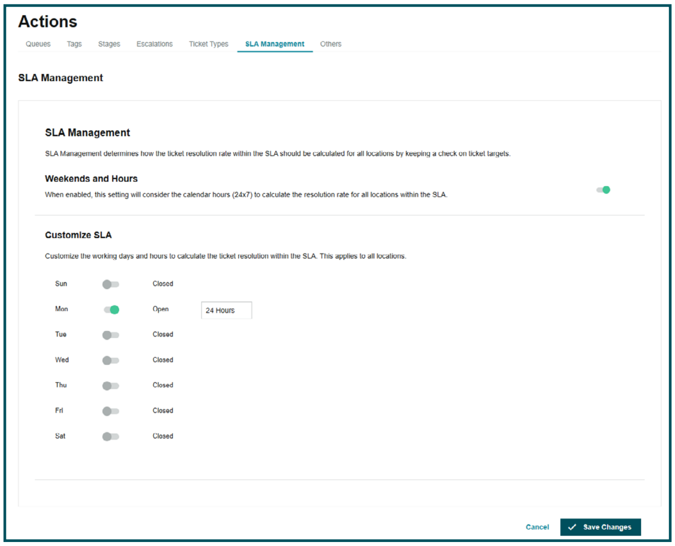
7. To create more fields, click **Create Field**.
8. Enter the **Field Name**.



9. Select the **Type**.
    - Boolean
    - DateTime
    - Double
    - Integer
    - String
    - Calculated Double
    - Calculated String
10. Select the **Field Display**.
    - This determines how the Type option is displayed.
11. Determine if this ticket type is Mandatory.
    a. Select **True** or **False**.
12. Determine if the options for this field are conditionally mandatory.
    - If the **Conditional Mandatory** option is set to **True**, then all other options in the field must be completed.
13. Click **Save** to return to the **Create Group** screen.
14. Click **Save** to return to the **Create Ticket Type** screen.
15. Click **Save** to save the ticket type.

SLA (Service Level Agreement) Management

Determine how the ticket resolution rate within the SLA is calculated for all locations by customizing the available working days and hours.



1. Click the toggle option for Weekends and Hours.
2. Click the toggle for each day to set the available hours.
3. Click **Save Changes**.

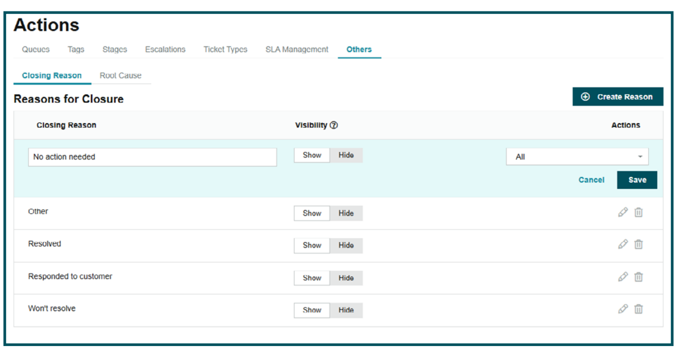
Others

Create additional reasons for closing a ticket and add root causes for further analysis. These options are available with user admin permissions.

For each reason or root cause listed, use the toggle to show or hide it in the dropdown selection included in the workflow.

Closing Reason

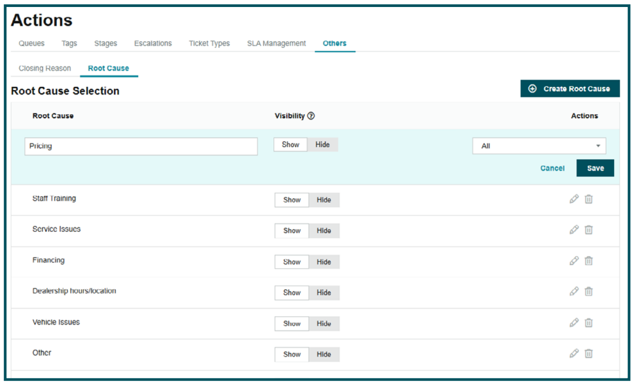
Create a list of message options to select from when a ticket is closed.



1. Click the edit icon next to a message to change it.
2. Edit the message.
3. Select the Ticket Type.
   - This determines which message options are available for certain ticket types.
4. Click **Create**.

Root Cause

Create a list of message options to select to assign a root cause to a ticket.



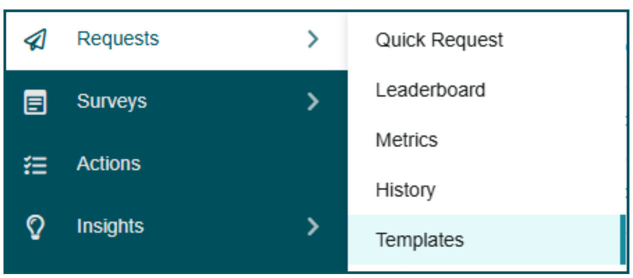
1. Click the edit icon next to a message to change it.
2. Edit the root cause.
3. Select the Ticket Type.
   - This determines which root cause options are available for certain ticket types.
4. Click **Save**.

Configure Templates

Templates can be used to complete actions in two different ways:

- Send a request to complete a survey or review.
- Send a response to a survey or review.

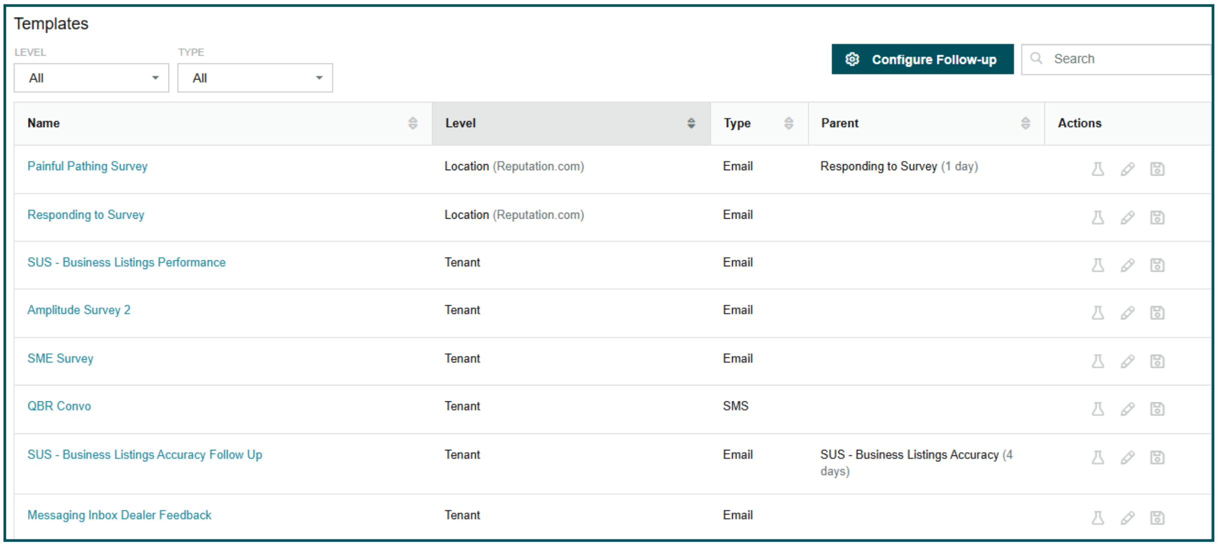
Create Request Templates



To edit a template for a request,

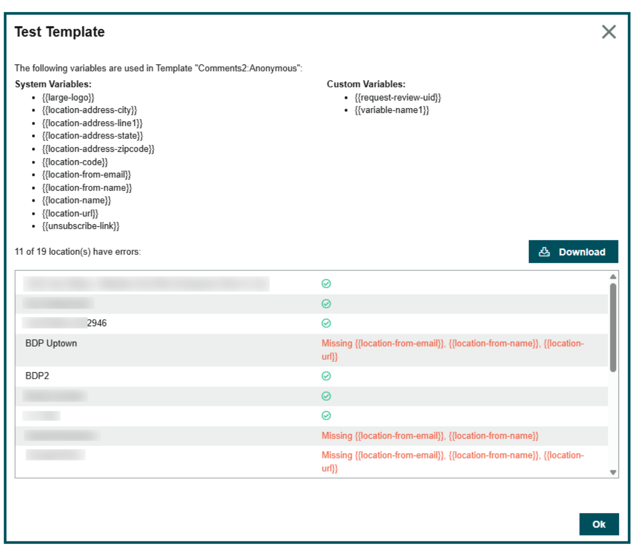
1. Go to **Requests** > **Templates**.

The templates list provides templates that can be edited as needed.



Columns	Description
Name	The name of the survey template.
Level	Who the template can be used by.
Type	The type of template: Email, SMS, or Conversational.
Parent	The previous template the template was created from.
Actions	Test icon: Shows the errors in the template. Edit icon: Edit the template. Save as New icon: Create a copy of the template.

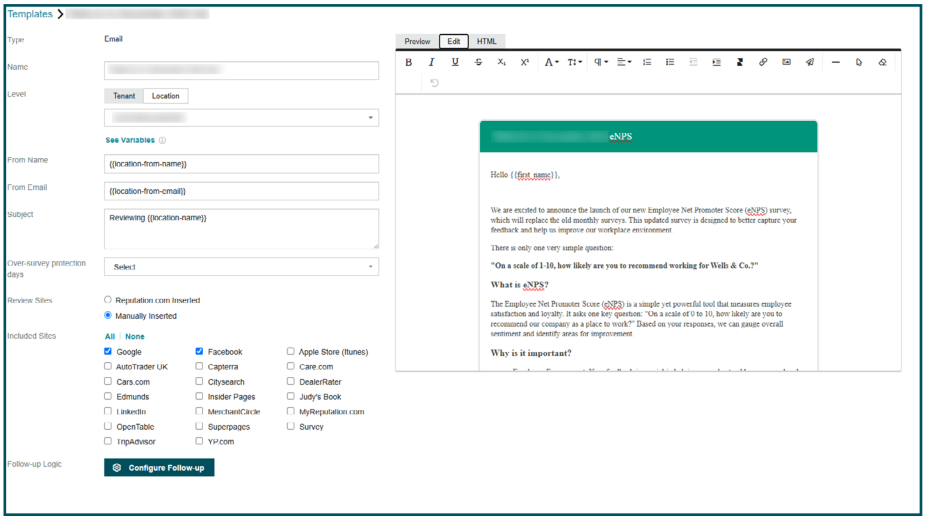
Test the Template



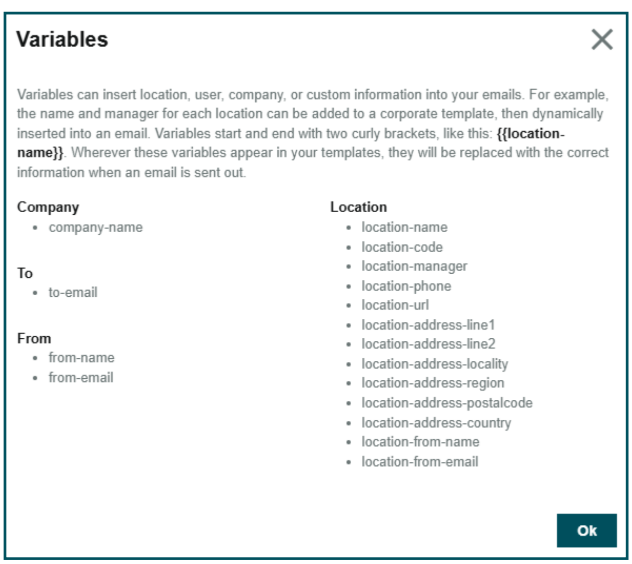
1. Click the test icon to open the test window.
   - The test widow displays the following:
     - Variables included in the template.
     - The locations that do not have the information completed for the variable.
2. Click **Download** to download a list of the variables.
3. Click **Ok** to close the window.

Edit the Template

1. Click the pencil icon to edit the template.
    a. Click the Save as New icon to create a new template as needed.

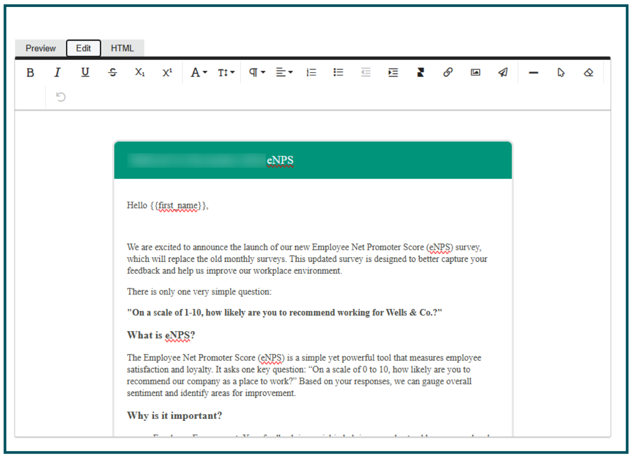


2. Enter the name of the template.
3. Choose if it is a Tenant or Location level template.
    a. If it is a location level template, select the location it is for.
        ○ A location level template is only used for one location. A tenant level template can be used for all locations within the tenant.
4. Complete the **From Name**, **From Email**, and **Subject** fields.
    - This step is only available for email templates.



5. Click **See Variables** to see the variables that can be used.

6. Select the number of **Over-survey protection days**.
   - This ensures the request receiver is not sent too many requests.
7. Determine which review sites to include in the template.
8. Click **Configure Follow-Up** to add follow up logic.
   - For more information, see the Requests User Guide.



9. Use the edit window to preview the template or edit it in a WYSIWYG or HTML editor.
   - For SMS, only the Preview and Text editor views are available.
10. Click **Save** to save the template.

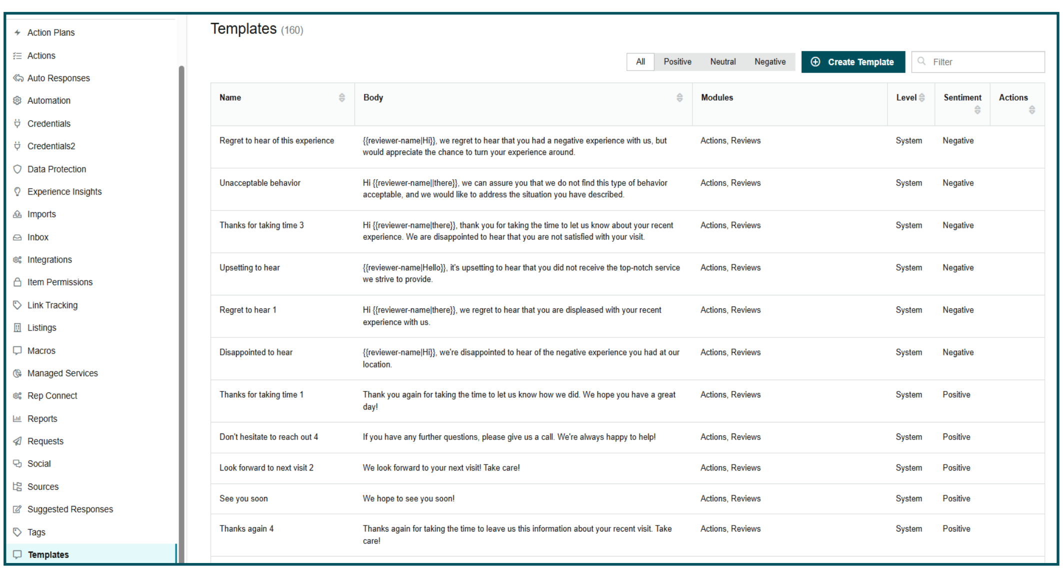
Create Response Templates

Use the Templates option in the settings to add or modify the available text in a response window. These options help responders to respond more efficiently and add variety.

Admin privileges are needed to add or modify templates. For assistance, see Contact Support on page 58.

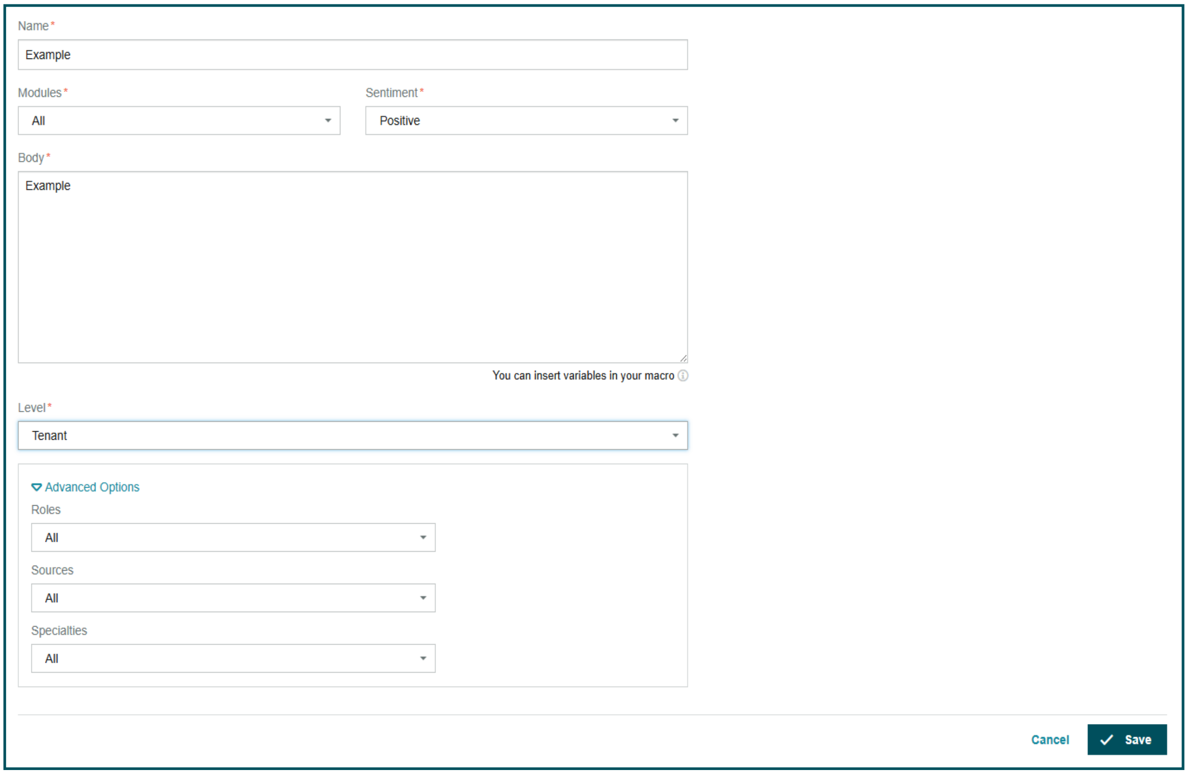
Add Templates

1. From the top, right corner of the platform, click **Settings**.
2. From the left navigation, click **Templates**.



- A list of all the templates displays. The templates designed for positive responses are selected by default. Switch between **Positive**, **Neutral**, and **Negative** to sort the templates or use the **Filter** box to search all the templates by keyword.
- System templates are provided by the platform for all users and cannot be edited.

3. Click **Create Template**.
4. Complete the following fields:



Field	Description
Name	The name of the template as it appears in the review response dropdown.
Modules	Select the modules where this template can be used.
Sentiment	Categorize the template as a reply to a positive review or negative review for sorting purposes. Positive templates only show in the response dropdown for reviews with a 4–5-star rating. Negative templates only show in the dropdown for reviews with no rating or a 1–3-star rating.
Body	The text that populates in the response window after choosing the template. The text cannot be formatted but it is possible to include variables.

Field	Description
Variables	Variables are placeholders for elements that will be overwritten with the associated data at the time of response. • Click the information icon for a list of variables to copy and paste into the body text. • Variable syntax is formatted as: {{variable-name}}. Add a vertical line character (|) and alternate text in the event the associated data for the variable is not available.
Level	The availability of the template. • To limit to a location, click **Location** and select the location from an additional dropdown. • To limit to the user profile, select **User**. • To make the template available to all users on the account, click **Tenant**.
Advanced Options	Open advanced options to add restrictions on how and where the template can be used. • **Roles**: Select which roles have access to the template. • **Sources**: Select where the review must originate from to access the template. • **Categories**: Select the category the review must be tagged in to access the template.

5. Click **Save**.

   - The template is added to the list and becomes available in the review response window according to the level specified (location, user, or tenant).

Create Automation Rules

> **Note**: Everything listed previously in this guide must be completed before automation is created.

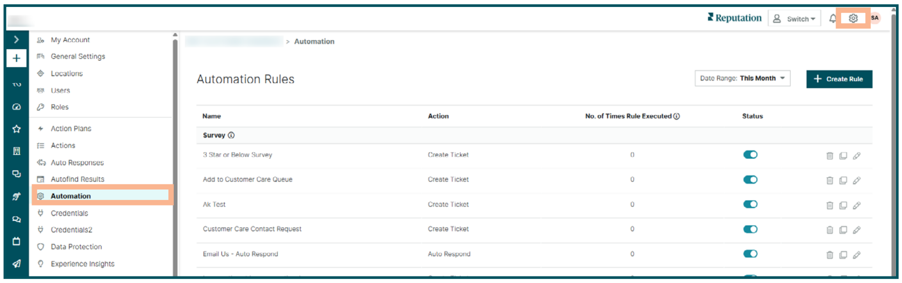
Creating a targeted set of rules for action creation and updates is important for response efficiency.

Set automation rules to determine how tickets are created or updated and what labels are applied to the action. Automate follow up requests and set auto respond rules for tickets using the templates created in the previous section.

Create a Ticket with Automation

To set up a ticket creation rule:

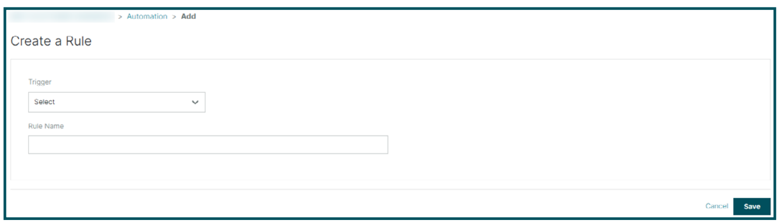
1. From the top, right corner of the platform, click **Settings**.



2. From the left navigation menu, click **Automation**.

3. Click **Create Rule**.

4. Select the appropriate **Trigger**.



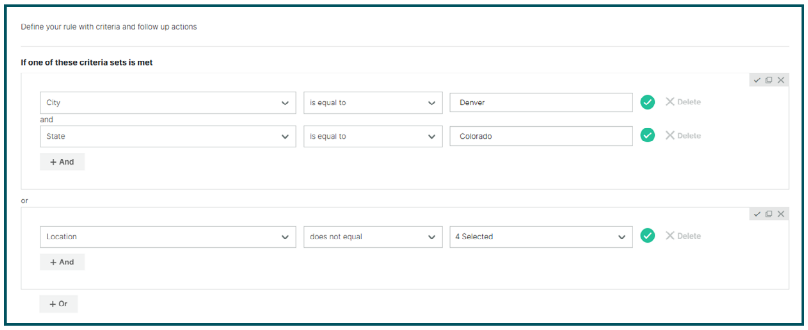
- Review
- Review Response
- Survey
- Tickets
- Ticket Custom Field(s)
- Message
- Social Post
- Social Post Reply

5. Enter a name for the rule (e.g., Reviews for Legal Team).

   a. If **Review** or **Survey** is selected as the trigger, enter a **Feedback Date Window**.

      - The Feedback Date Window provides a time range for the trigger (e.g., six days after a ticket is created). This is not retroactive and is only triggered for the current ticket.

6. Add the logic to trigger the rule by selecting the criteria (one or more), the criteria qualifier, and the criteria field.

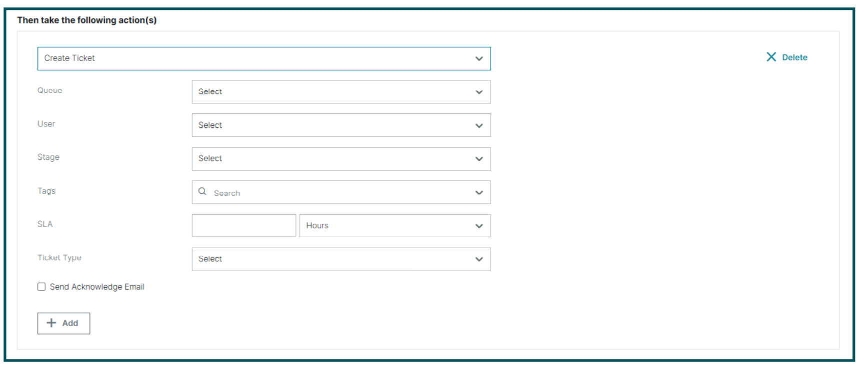


   a. Select **+And** to include additional criteria to the logic.

   b. Select **+Or** to include an additional logic phrase for the rule.

      ○ See the Criteria Table on page 27 for more information about the criteria available for selection.

7. Select the action performed when the ticket is triggered.



   ● See the Action Table on page 31 for more information about the actions available for each ticket.

8. Click **Save**.

Criteria Table

The criteria listed below are available depending on the selected trigger. The criteria determines the logic applied to a ticket. A selected action (listed in the Action Table below) occurs for the ticket if the criteria is met.

Criteria	Trigger	Description
Location	• Review • Review Response • Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Select the specific business locations.
Code	• Review • Review Response • Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Enter the Location Code.
Country	• Review • Review Response • Survey • Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Enter the country.

Criteria	Trigger	Description
City	• Review • Review Response • Survey • Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Enter the city.
State	• Review • Review Response • Survey • Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Enter the state.
Source	• Review • Review Response	Choose the data source of the customer feedback.
Sentiment	• Review • Review Response • Survey	Choose the overall sentiment from the customer feedback.
NPS	• Review • Review Response	Choose the overall Net Promoter Score from the customer feedback.
Comment	• Review • Review Response • Survey	Specify keywords to look for within the review or survey comment. Separate multiple keywords with commas.
Comment Length	• Review • Review Response	Set a minimum comment length in characters for the review.
Survey Response	• Review • Review Response	Specify keywords to look for within the review. Separate multiple keywords with commas.
Reviewer Name	• Review • Review Response	Specify the name of the person leaving feedback.

Criteria	Trigger	Description
Rating Updated	• Review • Review Response	Specify if the rating provided on a review has been updated.
Published	• Review • Review Response	Specify if the underlying review has been published to the source.
Flagged	• Review • Review Response	Specify if the underlying review has been flagged.
System Tags	• Review • Review Response • Survey	Specify if the underlying review or survey has any system tags.
Questions	• Survey	Select one of the questions listed in the survey.
Random	• Survey	Select a random question from the survey.
Locale	• Survey	Select the locale to determine the language (if the translations are available) of the survey.
Escalation	• Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Choose the exact escalation type defined in the **Escalation** tab. For more information, see Escalations on page 15.
Queue	• Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Select the exact Queue name.
User	• Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Select the exact User's name.

Criteria	Trigger	Description
Stage	• Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Select the exact Stage name.
Tags	• Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	Set the tags applied to the ticket/post.
Responded	• Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	The ticket, post, or message has been responded or not responded to.
Re-Opened	• Tickets • Ticket Custom Field(s) • Message • Social Post • Social Post Reply	A ticket, message, or post has been closed and then re-opened.

Action Table

The actions listed below are available depending on the selected trigger. The actions occur when the criteria (listed in the Criteria Table above) is met.

Action	Trigger	Description
Create Ticket	• Review • Survey	A ticket is created. • Select the queue, user, stage, tags, SLA (Service Level Agreement), and ticket type to assign to the new ticket. • Click **Send Acknowledge Email** to create an email that alerts the customer when a ticket is created.
Update Ticket	• Review • Review Response • Tickets • Ticket Custom Field(s)	The ticket is updated. • Select which updates are made to the ticket with the Queue, User, Stage, Remove Existing Tags, or Tags dropdowns.
Auto Respond	• Review • Survey	An automatic message is sent to the customer. • Select the message template from the dropdown. • For more information about creating a response template, see Create Response Templates on page 22.
Follow Up Request	• Survey	A follow up request is sent. • Click **+Add** to select the template to send as the follow up request. • For more information about creating a request template, see Create Request Templates on page 19.
Survey Request	• Tickets	A survey request is sent to the customer. • Select the survey template, survey overwriting, or request template. • For more information about creating a request template, see Create Request Templates on page 19.

Action	Trigger	Description
Assign User	• Message • Social Post • Social Post Reply	A user is assigned to the message/post.
Assign Role	• Message • Social Post • Social Post Reply	A role is assigned to the message/post.
Assign Queue	• Message • Social Post • Social Post Reply	The message/post is assigned to a queue.
Set Stage	• Message • Social Post • Social Post Reply	The message/post is set as Open or Closed.
Set Due Date	• Message • Social Post • Social Post Reply	A due date for the message/post is set. • Set the due date by hours, days, weeks, or months.
Apply Tags	• Message • Social Post • Social Post Reply	Tags are assigned to the message/post. • Use the dropdown and checkboxes to select the tags to add.
Mark Conversation	• Message • Social Post • Social Post Reply	The message/post is marked. • Use the dropdown to select Flag, Unflagged, Read, Unread, Published, or Unpublished.

Ticket Alerts

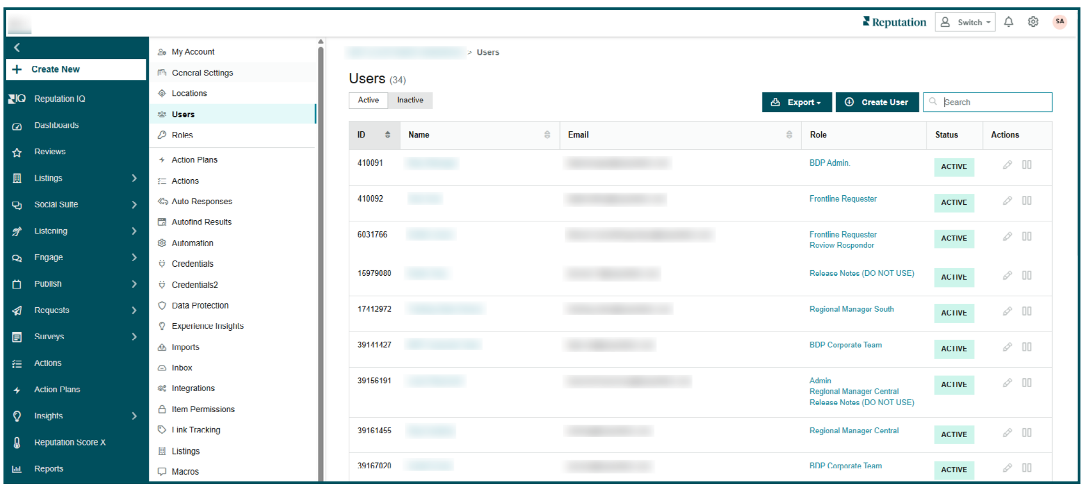
Email, mobile push notification, and platform notification tray alerts are available to trigger each time a ticket is created and/or one of these fields is updated:

- Escalation
- Stages
- Queues
- Tags
- Comments
- Attachment (added/removed)

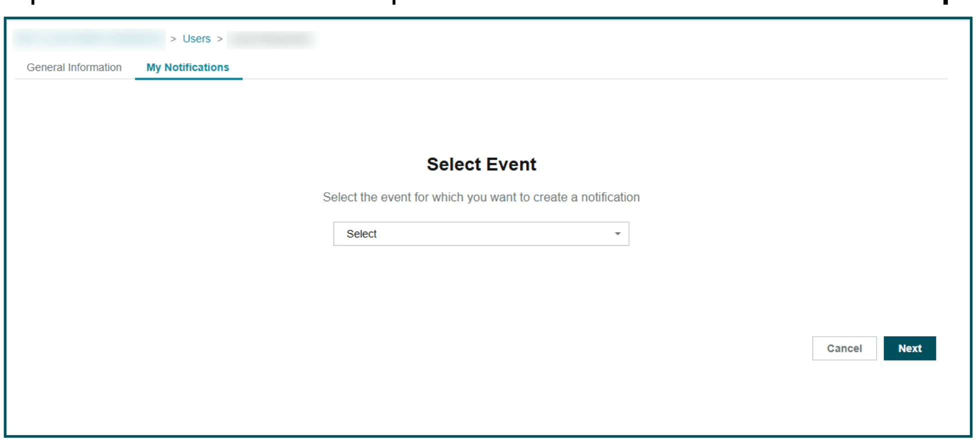
These notifications can be created at a role or user level.

To create a ticket alert,

1. Click the gear icon to open the general settings.
2. Under **Users**, click the correct user.

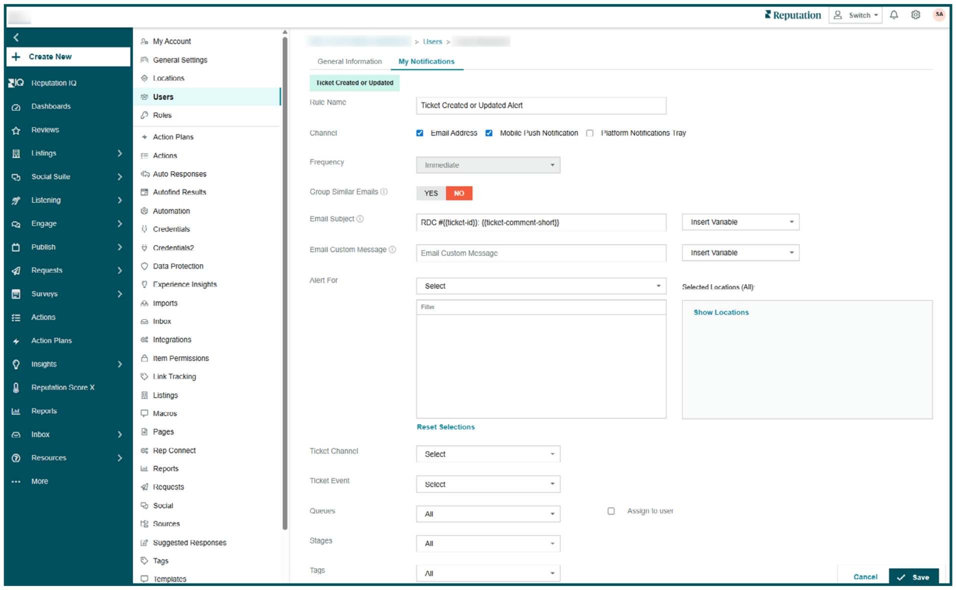


3. Click **My Notifications** > **Create Notification**.
4. Open the **Select Event** dropdown and select **Ticket Created or Updated**.



5. Click **Next**.

6. Enter the alert information.



   a. Update the **Rule Name**.

   b. Select how the alert is sent.

   c. Select how frequently the alert is sent.

   d. Click **Yes** or **No** to group similar alerts into one email.

   e. Create the email message for the alert including the email subject and message.

   f. Select what the alert is for and specific filters for that alert.

7. Click **Save**.

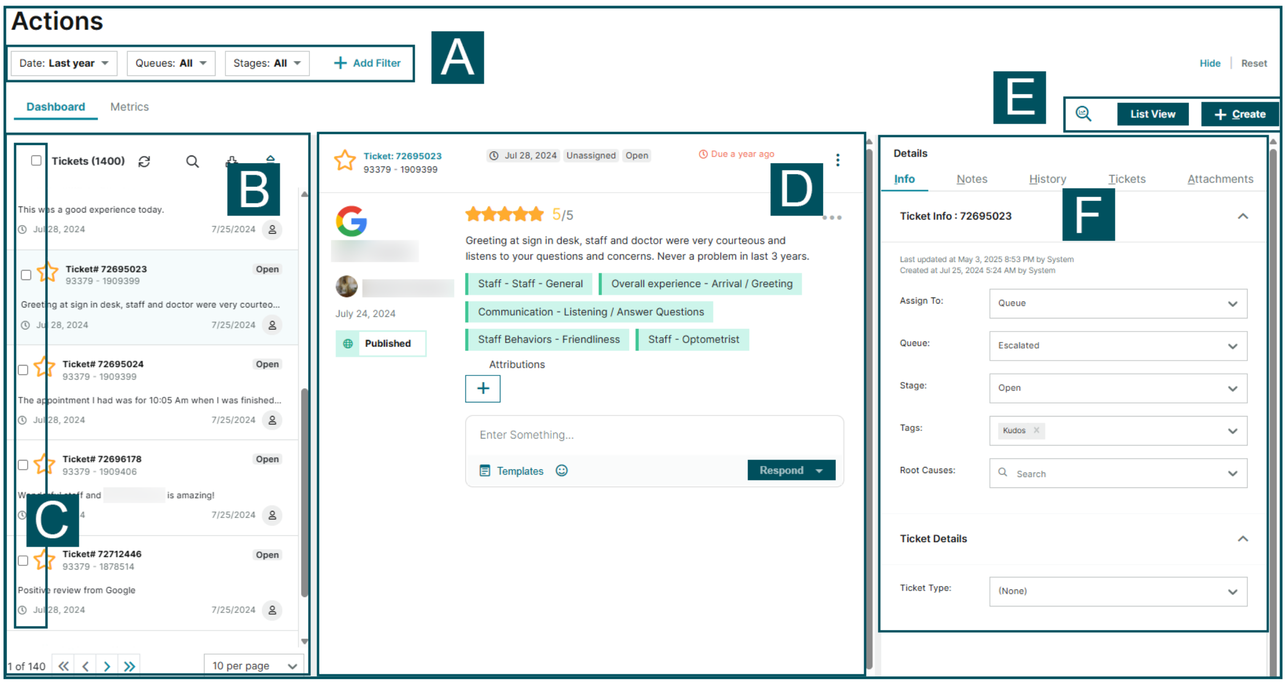
3 | Actions Dashboard

Actions Dashboard

Use the Actions Dashboard to display the tickets created from customer feedback and take action on them.

The **Actions Dashboard** displays all the tickets for all accessible locations. The ticket information displays in a 3-panel view or a list view.

3-Panel View



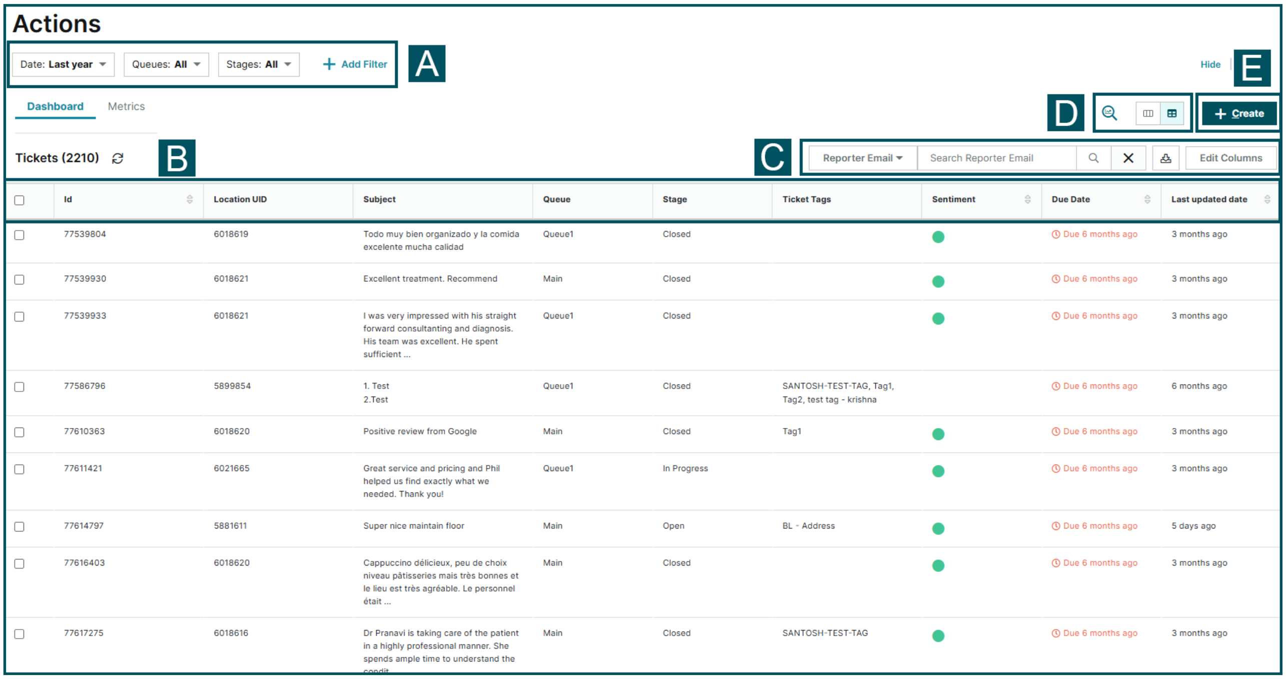
A	Progressive Filters	Use the progressive filters to adjust date range, select a queue, or other custom categories. For example, with multiple locations, use the filter to view tickets by location. These filters persist to different screens in the platform.
B	Ticket List	Use this column to view the list of tickets. Use the arrows in the top right corner to sort the tickets by newest, oldest, overdue, etc.
C	Bulk Ticket Actions	Select the checkbox next to one or more tickets and click the ellipsis to perform a bulk action. Actions include: Assign, Close, Tag, Export Selected, Set Stage, Assign, Postpone, and Delete.

D	Ticket Summary	Click on a ticket from the list to see a summary of the ticket and provide responses. For more information about the ticket summary panel, see Ticket Summary Panel on page 39.
E	Additional Information/ Create a Ticket	Click the magnifying glass icon to view the total numbers for the backlog, overdue tickets, resolution rates, and the tickets closed on time. Click **List View** to enter the List View. For more information about the List View, see List View on page 38. Use the **+Create** option to add a ticket to the dashboard.
F	Ticket Details For more information, see Update a Ticket on page 44.	**Info** Under the **Info** tab, sort the ticket by queues, stages, and tags.
		Notes Add internal notes about the ticket.
		History View the history of the ticket.
		Tickets View related tickets.
		Attachments Include relevant attachments to the ticket.

Each ticket includes fields that help describe what the ticket is about, who is working on the ticket, what stage the ticket is in, when the expected resolution time is, and other ticket metadata.

Note: Consider creating specific roles for users who are working with tickets. For example, frontline staff can update tickets, but only managers can close tickets.

List View

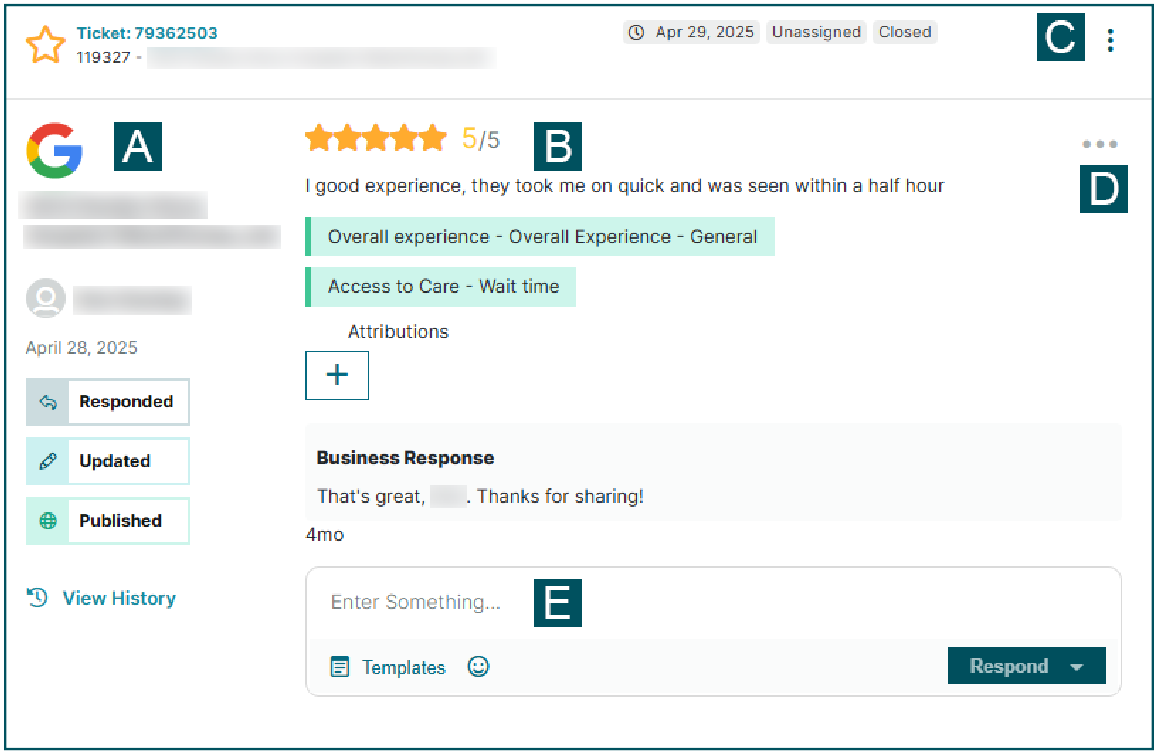


A	Progressive Filters	Use the progressive filters to adjust the date range, select a queue, display a specific status, or set other custom filters. For example, with multiple locations, use the filter to view tickets by location. These filters persist to different screens in Actions.
B	Ticket Columns	Use the arrows to filter the tickets by ascending or descending for each column.
C	Additional Actions	Use the dropdown to select a category to search: Reporter Email, Reporter Phone Number, Reporter Name, Customer Comments, or Ticket ID. Use the search bar to narrow the search further.
		Click the export icon to export an Excel or CSV version of the list.
		Click **Edit Column** to select the options to display as columns and drag and drop them into the desired order.
D	Additional Information	Click the magnifying glass icon to view the total numbers for the backlog, overdue tickets, resolution rates, and the tickets closed on time. Click **3-Panel View** icon to return to the 3-Panel View.
E	Create a Ticket	Click **+Create** to create a new ticket.

Ticket Summary Panel

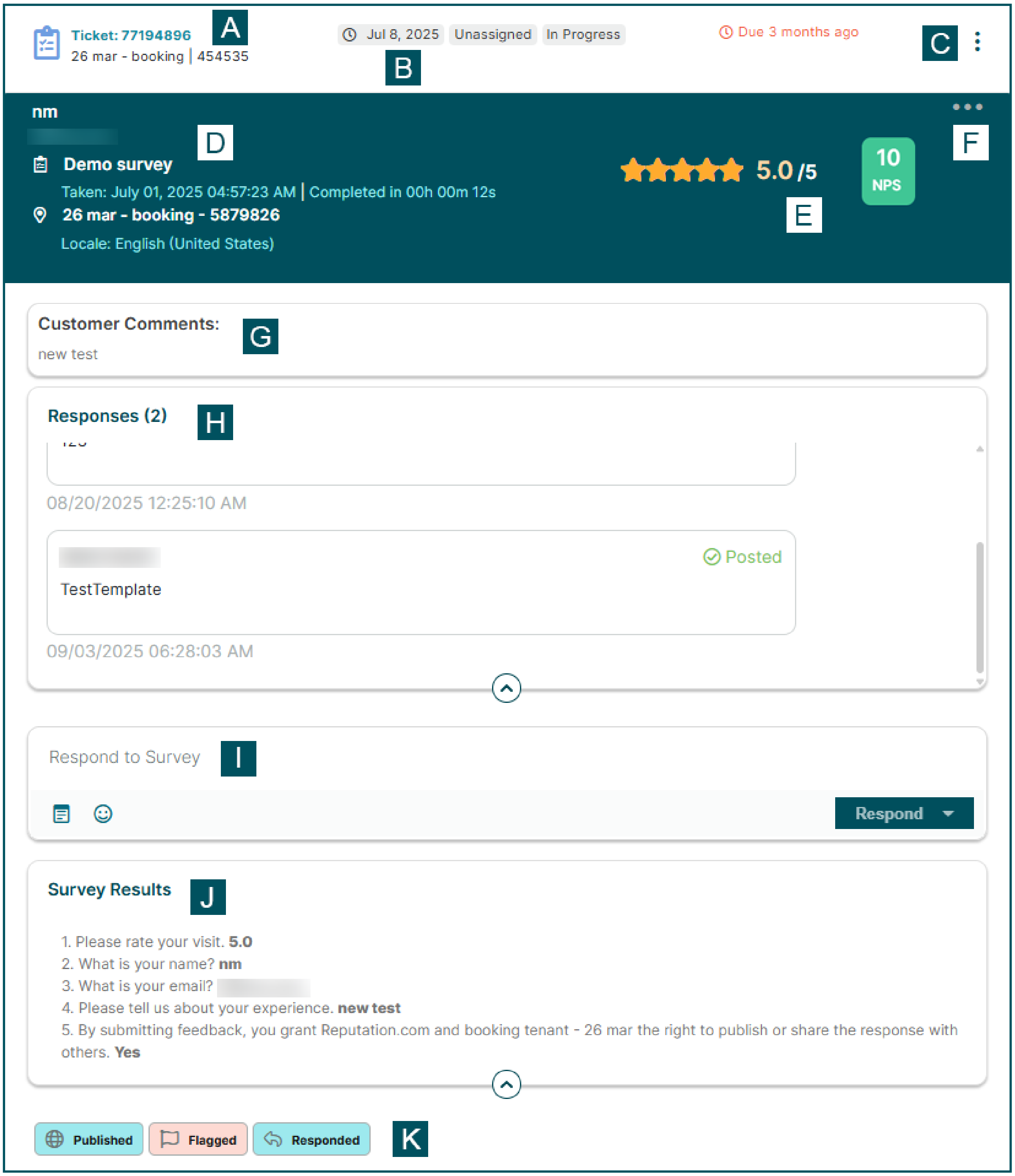
When a ticket is selected and displayed in the ticket summary panel, view the comments, rating, ticket status, and responses. The information displayed in the panel depends on how the ticket was created; from a review, from a survey, or manually.

Review Ticket



A	Ticket Information	View the ticket number, business location, submitter, ticket status, and ticket history.
B	Rating/ Comment	The overall star rating included in the review, the main review and it's overall sentiment, and the attributions of the review.
C	Ticket Options	Forward, delete, edit the close date, or reopen the review ticket.
D	Additional Options	Flag, Unpublish, or Share the ticket.
E	Respond	Use templates or emojis to respond to the review. For more information about templates, see Create Response Templates on page 22.

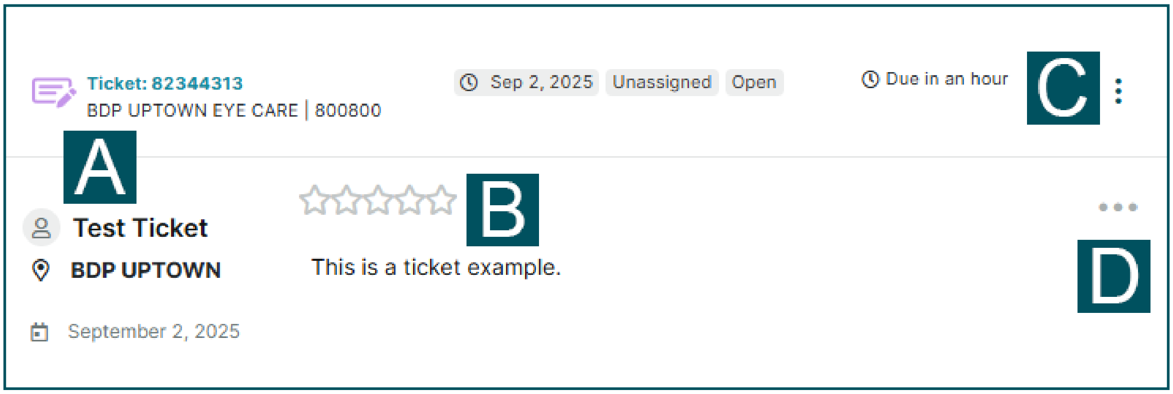
Survey Ticket



A	Ticket Information	View the ticket number, location, and location code.
B	Ticket Status	View the ticket due date, who the ticket is assigned to, and the status of the ticket.
C	Ticket Options	Forward, postpone, delete, close, or explain and close the survey ticket.

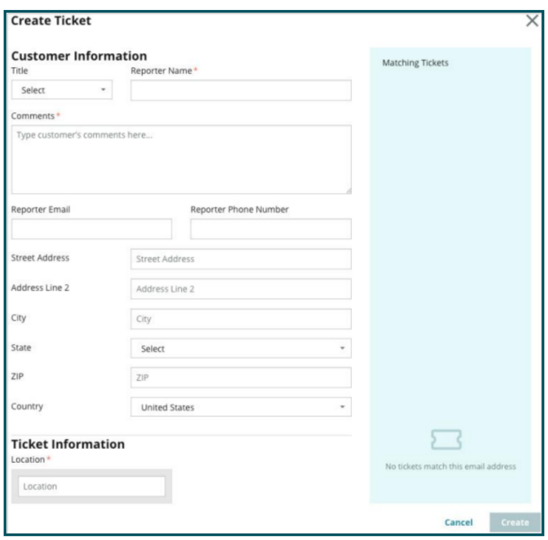
D	Survey Taker Information	View the name of the survey taker as well as the survey template name, when the survey was taken, how long it took to complete the survey, and the location of the survey.
E	Rating	The answer to the overall star rating and NPS rating questions in the survey. For more information about overall rating questions, see the Surveys User Guide.
F	Additional Options	Download a PDF or edit, flag, or share the ticket.
G	Customer Comments	The answer to the overall comment question in the survey.
H	Survey Response	View the survey responses that have been sent.
I	Respond to the Survey	Type a response to the survey or select a survey response template. For more information about templates, see Create Response Templates on page 22.
J	Survey Results	View the answers to the survey.
K	Sorting Tags	This shows if the survey has been published, responded to, flagged, or marked as suspect.

Manual Ticket



A	Ticket Information	View the ticket number, business location, submitter, and ticket date.
B	Ticket Comment	The main explanation for the ticket.
C	Ticket Options	Forward, delete, edit the close date, or reopen the ticket.
D	Edit Ticket	Open the ticket to edit it.

Create a Ticket



The platform supports the following methods for ticket creation:

- **Automatic**: Tickets are generated according to configuration rules or integration (phone call, email, letter).
  - For more information, see [Create Automation Rules on page 24].
- **Mobile Manual**: Tap the plus icon in the Reputation mobile app under the **Actions** tab.
  - For more information about the mobile app, see the [Mobile App User Guide].
- **Desktop Manual**: Click the **Create Ticket** button from the Actions Dashboard.

The following information is required to create a ticket manually:

Customer Information	**Description**
Title	Select the title to apply to the reporter name.
Reporter Name	The reporter is the person reporting the issue/statement. (This could be the person creating ticket or the person requesting a ticket be created.)
Customer Comments	Enter the details about the issue this ticket applies to.
Reporter Email	Enter the email of the reporter.
Reporter Phone Number	Enter the phone number of the reporter.
Street Address	Enter the address for the reporter. (This includes the street, city, state, zip, and country.)
Ticket Information	**Description**
Location	Select the business location this ticket applies to.
Note	Enter any internal notes about the ticket.
Tags	Search and select applicable tags to assign to the ticket. For more information, see Tags on page 12.
Stage	Select if the ticket is **Open** or **In Progress**. • If the ticket is Open, it has been created but work has not started for it. • If the ticket is In Progress, work has been started to address the issue.
Due In	Enter a number and select if the ticket will be due in hours, days, weeks, or months.
Ticket Type	Select the ticket type. For more information, see Ticket Types on page 15.
Attachments	Drag and drop or click **browse** to attach a file to the ticket.

Update a Ticket

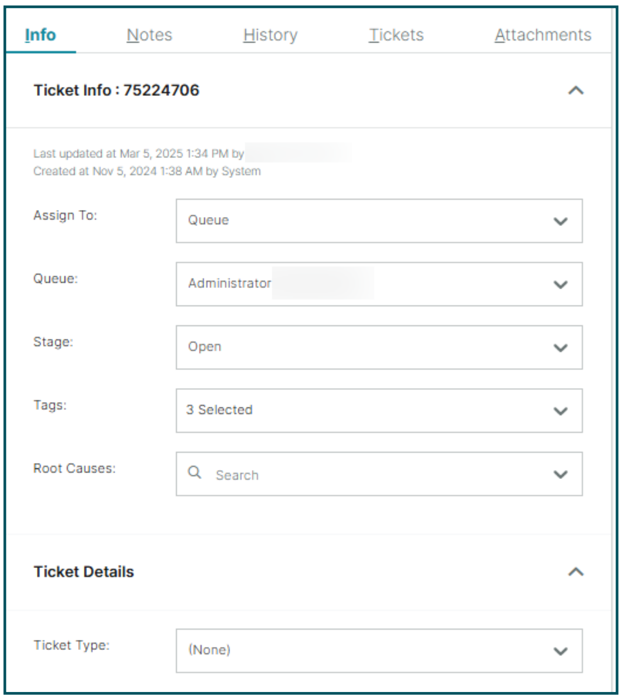
Use the **Ticket Details** column to update a ticket as needed.

> **Note**: To apply bulk updates to tickets, use the checkboxes on the Actions dashboard.

Info

Because multiple people may change a ticket, it is important to accurately provide progress updates in the ticket notes.

The **Info** tab includes options to select Queue, Stage, Tags, Root Causes, and Ticket Type (if any).

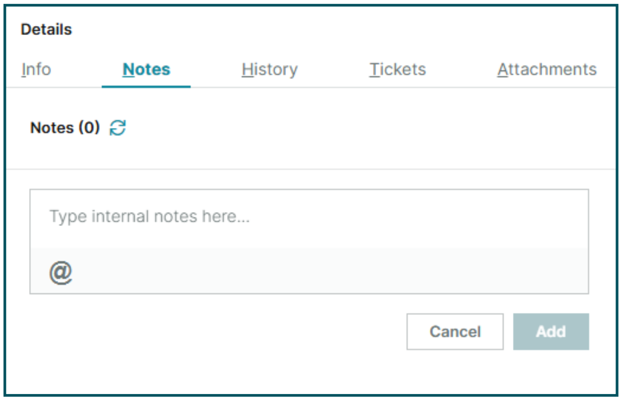


1. From the **Actions** dashboard, select a ticket to open the details.
2. On the **Info** tab, update the Queue, Stage, Tags, Root Causes, or custom fields.
   - Upload attachments as needed.

Notes

The **Notes** tab under **Ticket Details** provides a place to collaborate internally about the ticket.

Notes are not visible to customers.

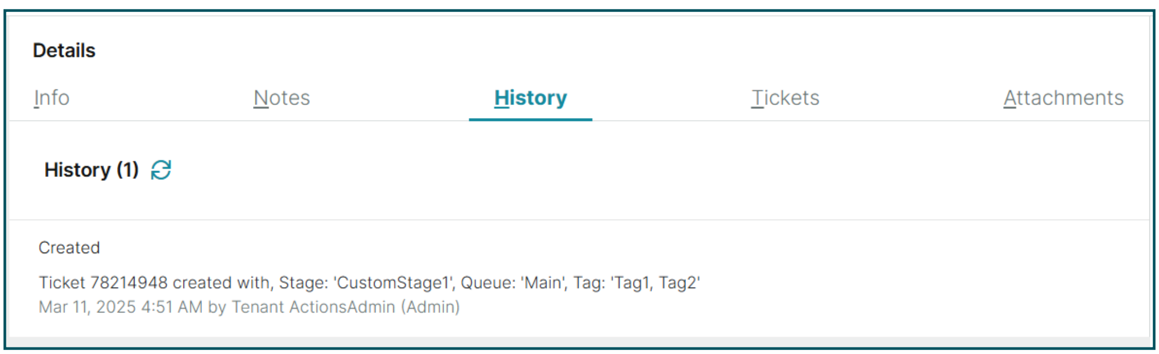


1. From the **Actions** dashboard, select a ticket to open the Ticket Details.
2. Under the **Notes** tab, add a note to reflect the latest action.

Note: Also add notes to a ticket from the Inbox when replying to an automated message that was generated by a New Ticket or Ticket Updated notification.

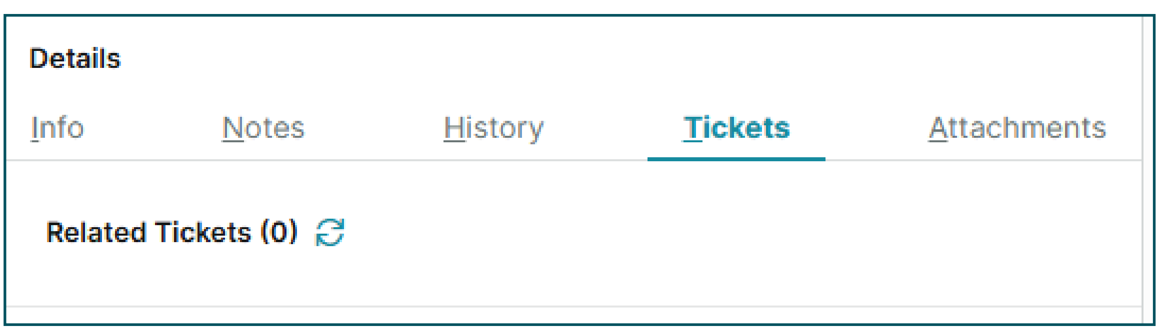
History

Anytime a ticket is updated, the activity is automatically logged under the **History** tab, which displays the full life cycle of the ticket by reviewing who took each action and when.



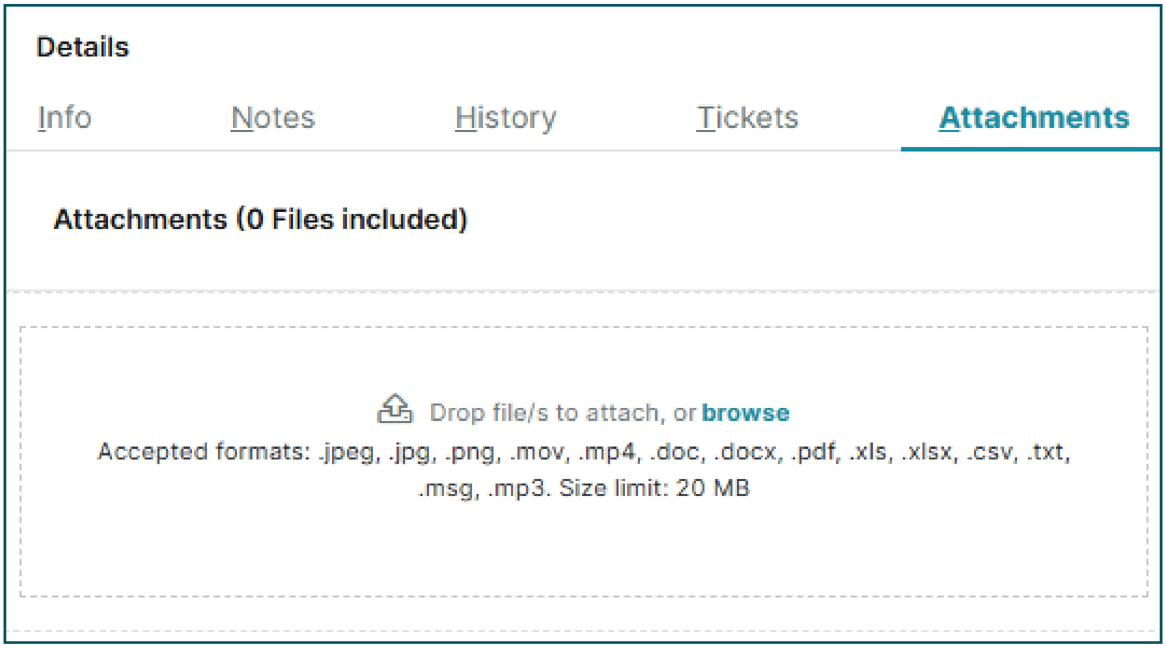
Tickets

View any tickets with the same customer email related to the current open ticket.



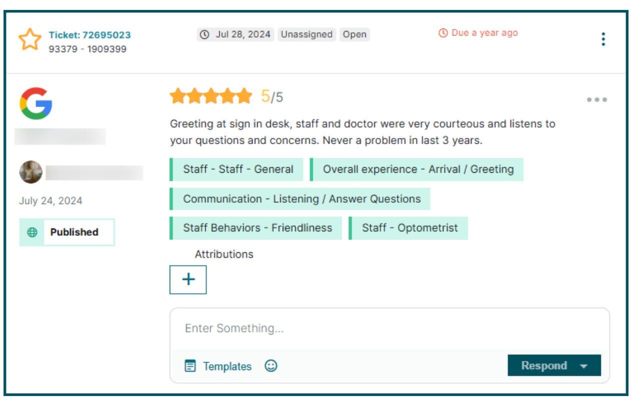
Attachments

Drag and drop or click **browse** to attach a file to the ticket.



Respond to a Ticket

To respond to a ticket,



1. Click on the ticket from the ticket list to open the ticket summary.
2. Type the response.
   a. Click **Templates** to use a response template.
      - For more information about response templates, see [Create Response Templates on page 22](#).

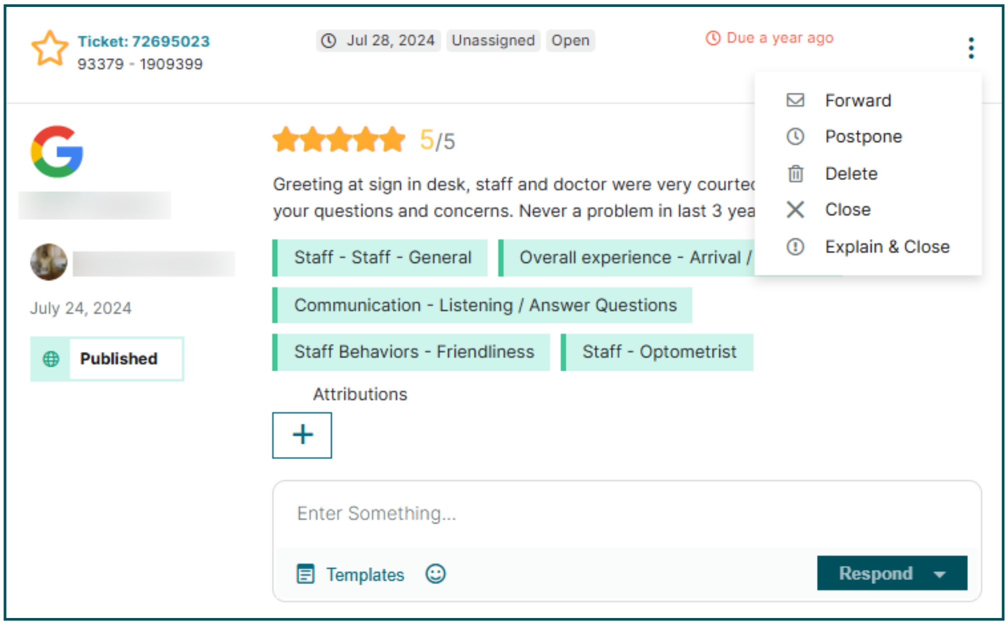
   b. Click the emoji icon to add emojis to the response.

Forward a Ticket

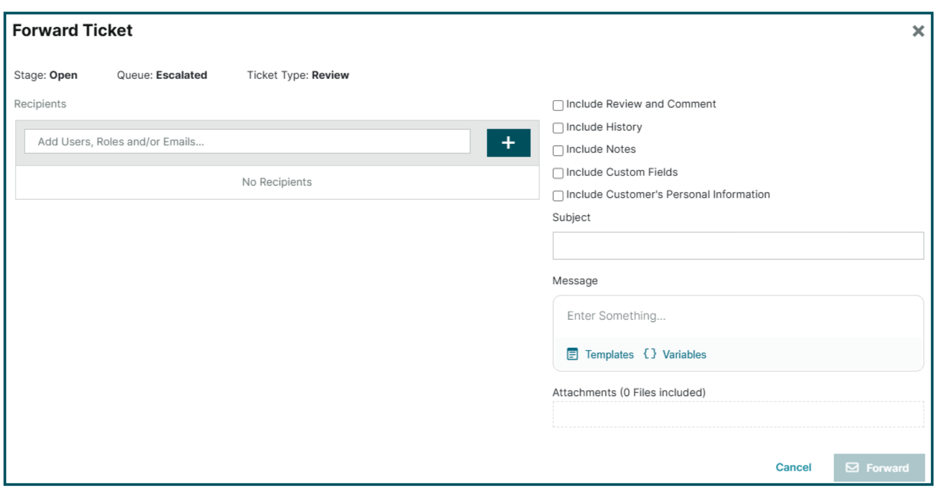
Forwarding a ticket sends the ticket summary to other users via email.

To forward a ticket:

1. From the **Actions** dashboard, select a ticket to open the ticket summary.
2. Click the ellipsis and select **Forward**.



3. Enter the recipient(s) email address(es) or platform username or role.
    a. Click the **+** to add the email or role to the recipient list.
4. Enter a subject and message for the email.
5. Click the checkboxes to include the review, history, and/or comments in the email.



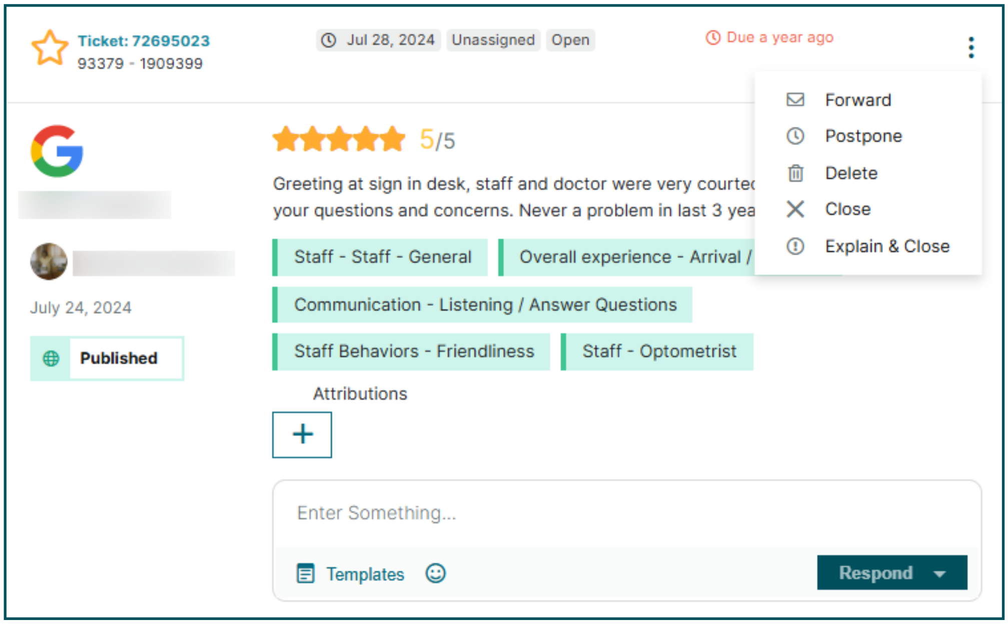
6. Click **Forward**.
    - The ticket details are sent via email to all listed recipients.

Postpone a Ticket

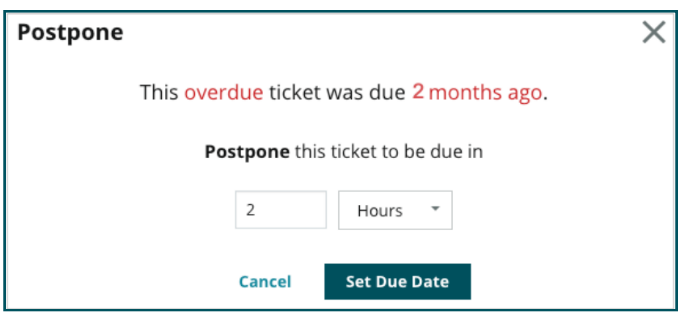
Postponing a ticket sets a new due date for the ticket.

To postpone a ticket:

1. From the **Actions** dashboard, select a ticket to open the ticket summary.
2. Click the ellipsis and select **Postpone**.



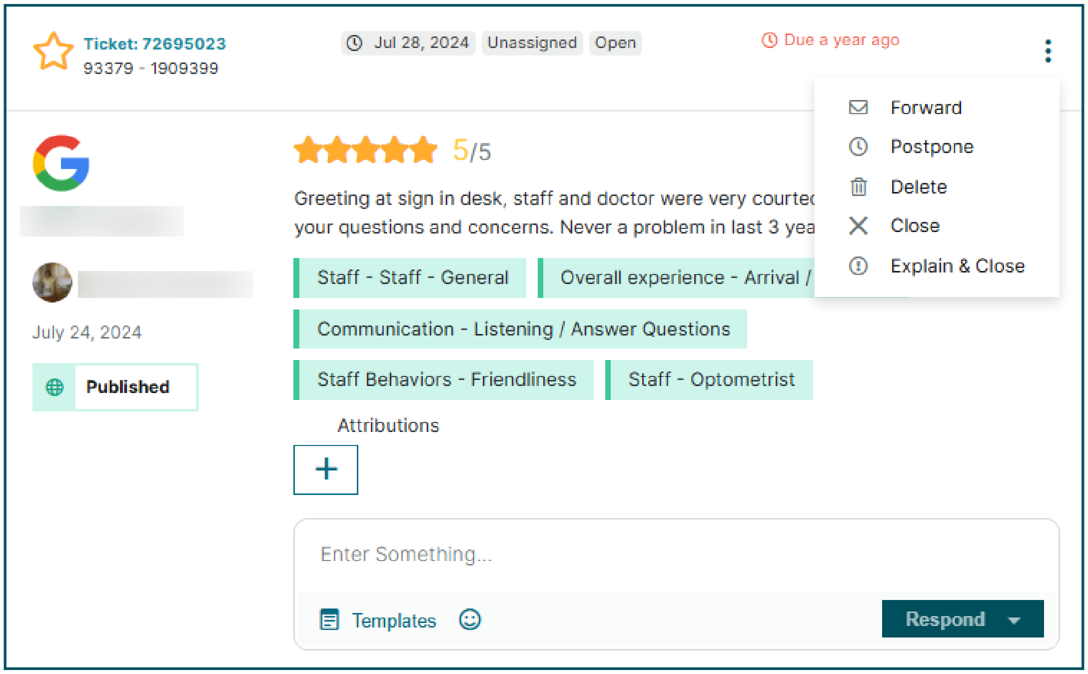
3. Enter the number of hours, days, weeks, or months to postpone the ticket by.
4. Click **Set Due Date**.



Delete a Ticket

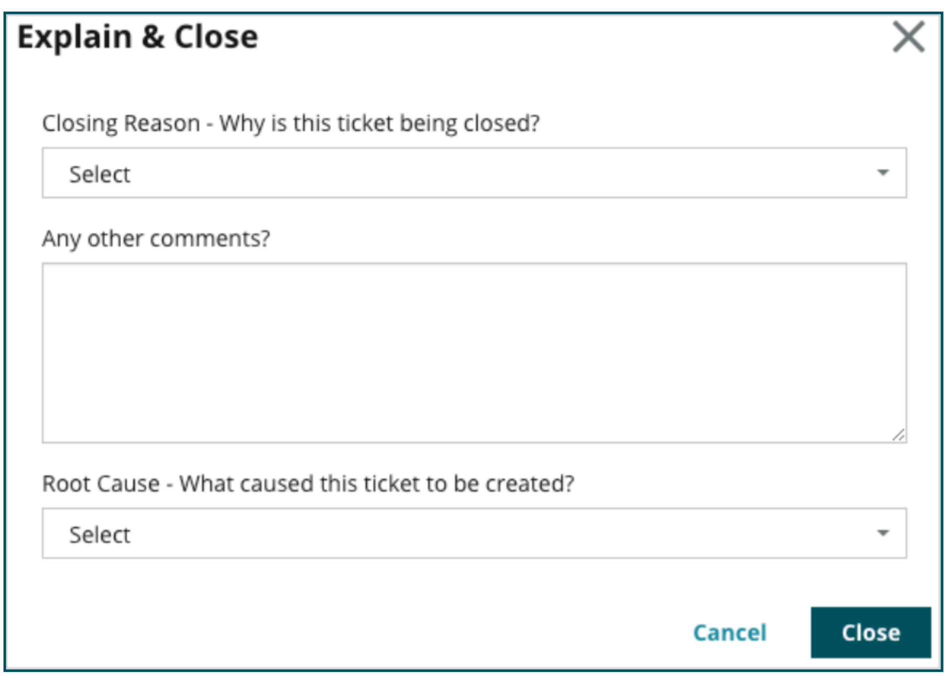
To delete a ticket,

1. From the **Actions** dashboard, select a ticket to open the ticket summary.
2. Click the menu in the top right corner and select **Delete**.



Close a Ticket

When a resolution was provided and accepted, click the **Close** button to add an item to the log and automatically set the ticket stage to Closed. To provide an explanation (closing reason, comments, root cause, etc.), select **Explain & Close**.



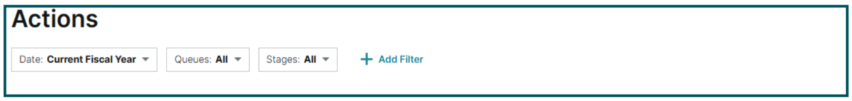
4 | View Actions Metrics

Actions Metrics

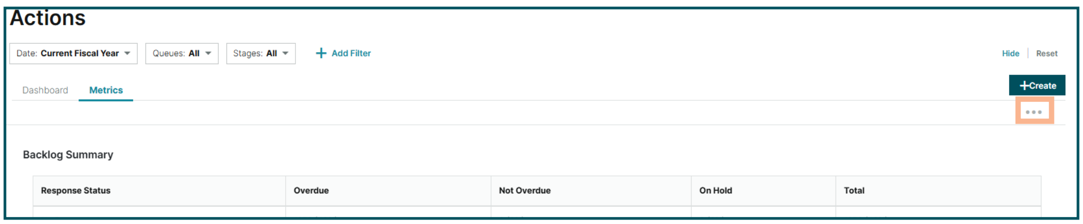
Use Actions Metrics to set internal KPIs for ticket activity.

The **Actions Metrics** tab displays interactive charts and graphs to help investigate trends in tickets and resolution efforts. Ticket reports are also available under the **Reports** tab.

- Use the progressive filters to change the data in the charts.



- For any of the charts, click the ellipsis to view additional options for downloading charts to PDF, automating scheduled emails, or forwarding the data via emails.

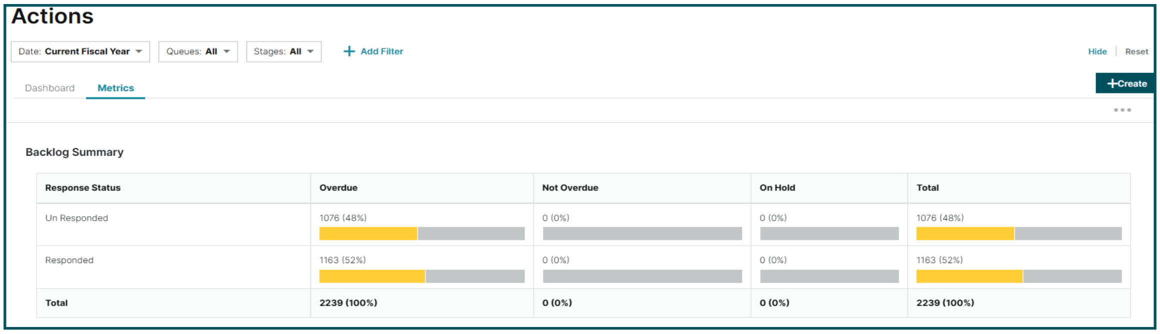


View statistics about the progress in resolving tickets.

Metric	Description
Backlog Summary	Number of tickets that have not been closed.
Progress Summary by Due Date	Number of tickets closed, backlog, closed on time, and overdue.
Complaints	Number of complaints (non-positive customer feedback).

Backlog Summary

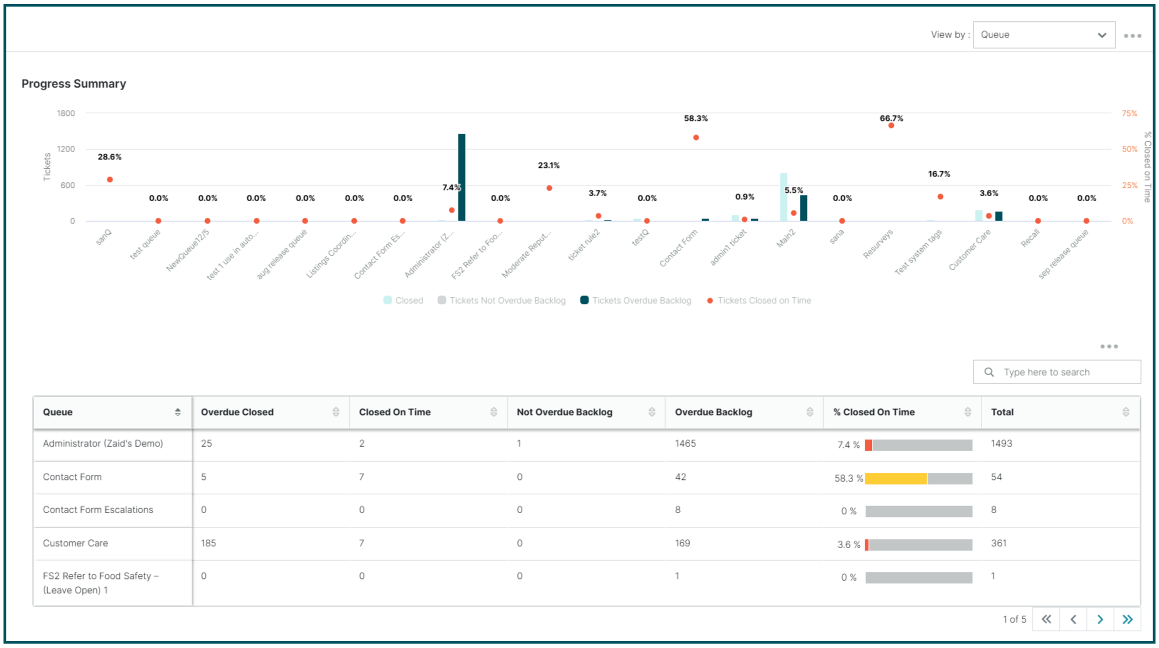
View the number of tickets in the backlog that are Overdue, Not Overdue, or On Hold and that are Responded/Unresponded. Tickets that are Overdue and Unresponded should be addressed first, whereas tickets that are Not Overdue and Responded are less urgent.



Progress Summary

The **Progress Summary** chart provides clarity on a team's performance. Use the **View by** filter to slice the chart by Location, Queue, Response Status, Tag, Source, Sentiment, or a custom filter. The chart and table below show the same information in two different formats.

The graph shows the number of tickets in the Closed, Not Overdue Backlog, and Overdue Backlog buckets, as well as the percentage of tickets closed on time based on the **View by** factor selected (e.g., Sentiment).



Complaints

Review the number of complaints (non-positive customer feedback) in the Backlog, the Average Number of Days to Close a Complaint, the Number of Days Since the Last Complaint, and the Date/ Age of the Oldest Outstanding Complaint based on the **View by** factor selected (e.g., Response Status).

Complaints

Type here to search

Queue	Complaints	Average Days to Close Complaint	Days Since Last Complaint	Date of Oldest Outstanding Complaint	Age of Oldest Outstanding Complaint (Days)
Administrator (Zaid's Demo)	10	133.4	167	10/15/2020	1604
Contact Form	4	0	44	3/10/2022	1093
Contact Form Escalations	1	0	262	6/18/2024	262
Customer Care	156	157.3	484	11/19/2021	1204
FS2 Refer to Food Safety – (Leave Open) 1	0	0	0	-	0

1 of 5

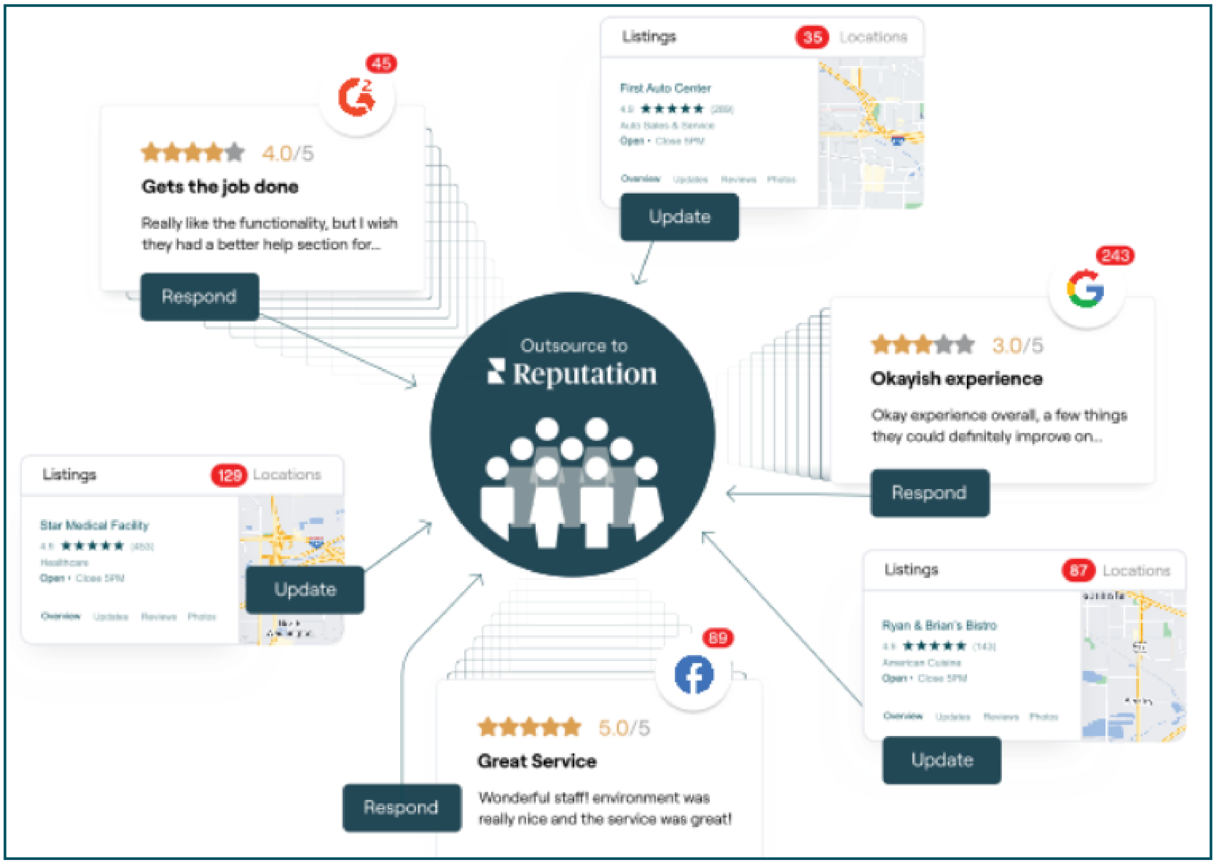
Note: Also view metrics in the **Reports** module by expanding the Actions category.

5 | Premium Paid Services

Premium Paid Services

While we strive to make our platform intuitive and efficient, we understand your time is valuable; resources and bandwidth can be limited. Reputation has a dedicated team of experts ready to help you manage your listings; optimize SEO; and post, publish, and curate your social posts—while also managing your review responses. We can help achieve customer excellence through this suite of value-added services that are fueled by our platform and products. These experts will help you:

- Go Beyond Accuracy (Managed Business Listings)
- Maximize the Appeal of Your Business Profiles (Managed Services for Google)
- Harness the Power of Social Media (Managed Social)
- Win as the Brand That Cares the Most (Managed Review Response)



Contact your Account Executive for more information on our Premium Paid Services.

6 | Additional Resources

Additional Resources

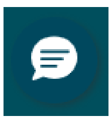
View the full set of user guides to learn more about the Reputation platform.

- Admin
- Business Listings
- Dashboards
- Engage
- Inbox
- Insights
- Mobile App
- Publish
- Rep Connect
- Reports
- Reputation Score X
- ReputationIQ
- Requests
- Reviews
- Social Listening
- Surveys

Contact Support

The Technical Support Team can be contacted in several ways:

- **US Support**: (800) 400-8064
  - Monday–Friday, 7:00 am–5:00 pm PST
- **UK Support**: 0800 066 04781
  - Monday–Thursday, 9:00 am–5:30 pm, Friday 9:00 am–5:00 pm Europe/London (GMT)
- **Virtual Assistant**: In the lower left corner of the Reputation Platform, live-chat with Technical Support or create a ticket that goes to the Technical Support Team.

  - Monday–Friday, 7:00 am–5:00 pm PST
- **Reputation Support Portal**: Sign in and create a ticket on the Contact Us page.

Best Practices for Technical Support Requests

When submitting a ticket through the Support Portal or the Virtual Assistant we recommend including all the information below:

- Business Name
- Location Name (may not apply for multiple locations)
- Location ID
- Case Priority:
  - **Low**: Information request. Can affect one or many users but has a low impact on core functionality.
  - **Medium**: Affects one or many users, high/medium impact to core functionality, but there is a workaround available.
  - **High**: No workaround, high impact to core functionality, affects several users.
  - **Blocker**: For a bug to be deemed a blocker bug it needs to meet one or more of the following criteria:
    - One or more sections of the platform are unusable for all users. This includes the entire platform being unavailable.
    - There is a massive data loss for the account.

- Customer Contact Information (Name/Email)
  - Do you have Business Listings? (Y/N)
  - Do you have an Integration? (Y/N)
- Issue/Question Type (to the best of your ability)
- Brief Synopsis
  - Be as detailed as possible
  - Steps to reproduce
  - Specific examples
  - Include screenshots when possible