Dashboards

User Guide

Reputation

2025

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1 | Dashboard Overview

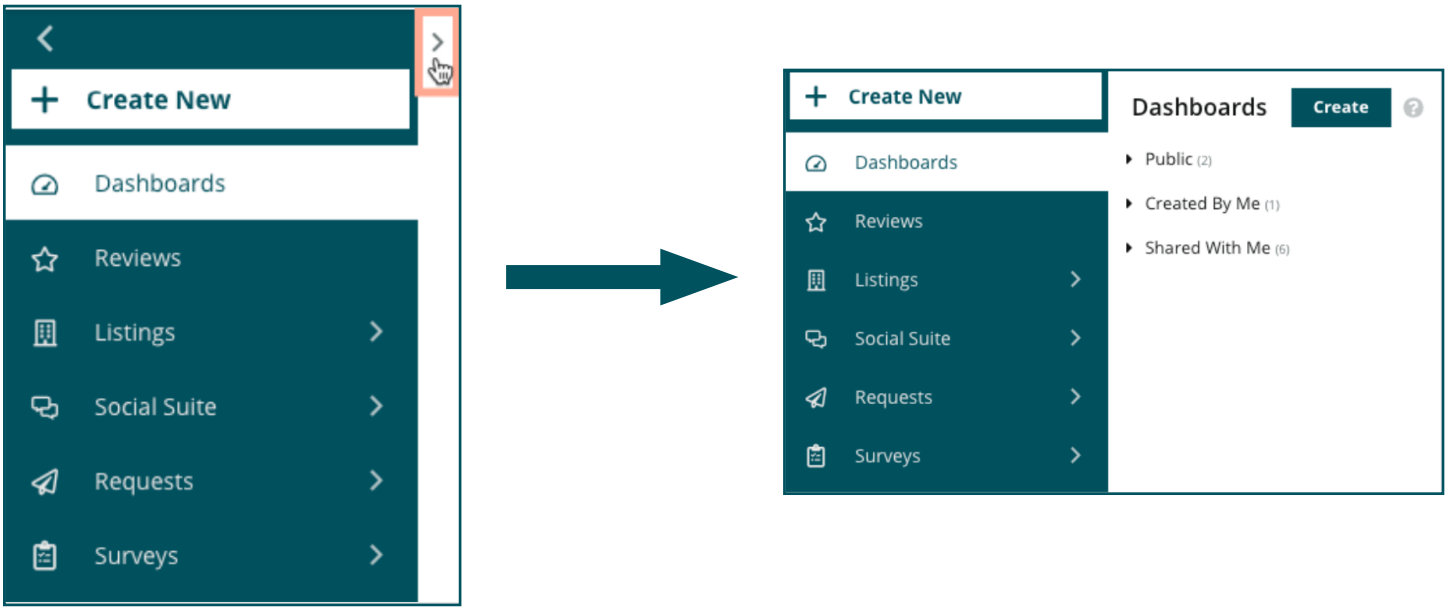
Dashboard Overview

The dashboard provides insight on your company's performance regarding Reputation Score and additional metrics.

The **Dashboards** tab provides pre-populated, public dashboards to track sentiment, Reputation Score, survey performance, and high-level metrics per solution.

View the saved custom dashboards as well as dashboards others have shared.

To expand the **Dashboards** menu, click the arrow in the upper right corner of the left navigational menu.



Filters

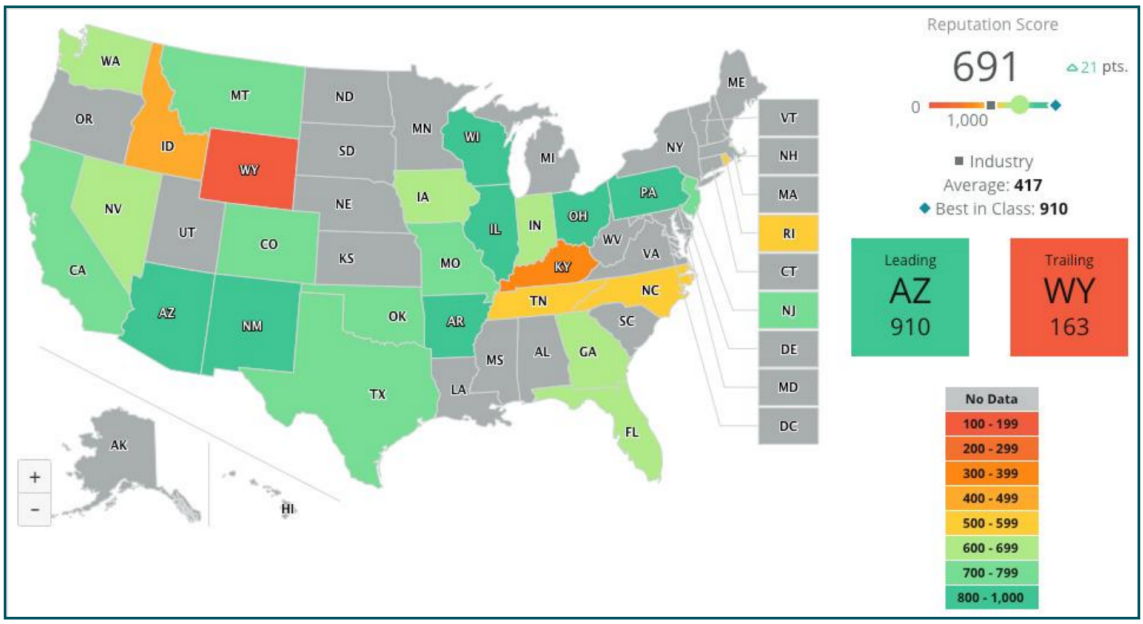
Top-line filters affect the data shown on the tab. Add customizations to each dashboard.



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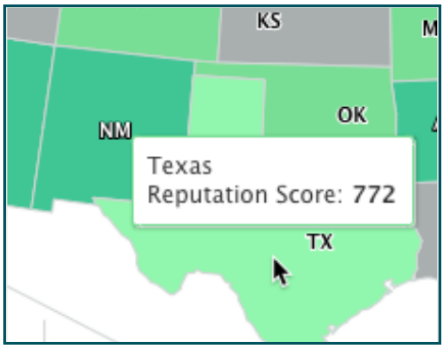
Map Dashboard

The map dashboard is the default screen if you have access to more than one location.

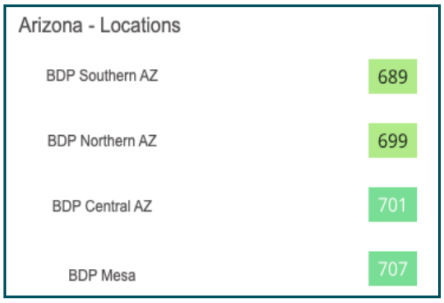


Dive deeper into the map's dashboard data and insights by clicking into different states and following the steps shown below:

1. Hover over colored areas on the map to view Reputation Score for a region.



2. Click a region to view a snapshot of individual locations.



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3. Click an individual location to open the **Summary** dashboard for that specific location.

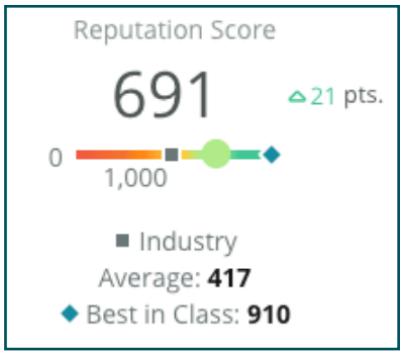


The following four components make up the map dashboard:

Reputation Score

The average Reputation Score of all locations selected.

- **Industry Average** represents 1,000 businesses in your industry (Reputation.com customers and non-customers).
- **Best in Class** represents the highest scores within that 1,000 business sample.



Leading and Trailing

The regions with the highest average Reputation Score and the lowest average Reputation Score.

If the map is colored by Star Rating as opposed to Reputation Score, **Leading** is the location with the highest average star rating and **Trailing** is the location with the lowest average star rating.

If no location qualifies for the selected filters, a blank gray box appears.

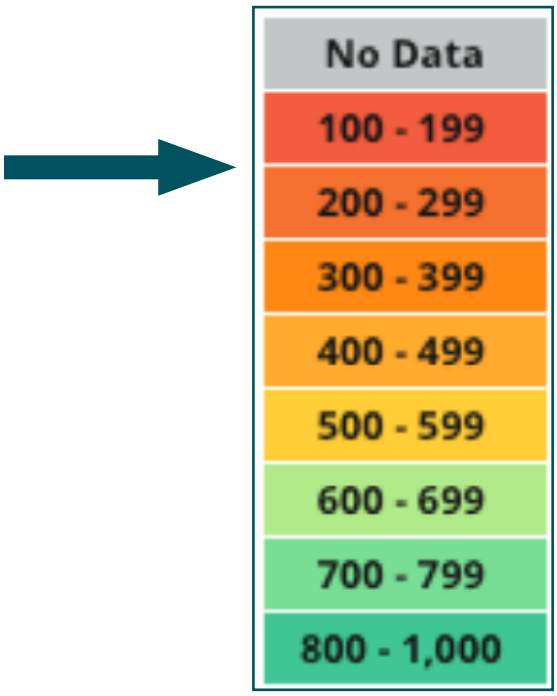


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Legend

Data is segmented into a range depending on the **Color Map By** filter (Reputation Score or Star Rating) selected in the **Customize** settings.

No data indicates that no region in the selection is associated with your account or no reviews have been associated with that region.



Benchmark

The **Benchmark** filter under **Customize** colorizes the map to see which regions fall above or below the Industry Average, Best in Class, or My Locations' Average.

Additionally, if you have a Competitive Insights solution enabled, you can colorize the map to compare against a specific competitor or all competitors.



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Summary Dashboard

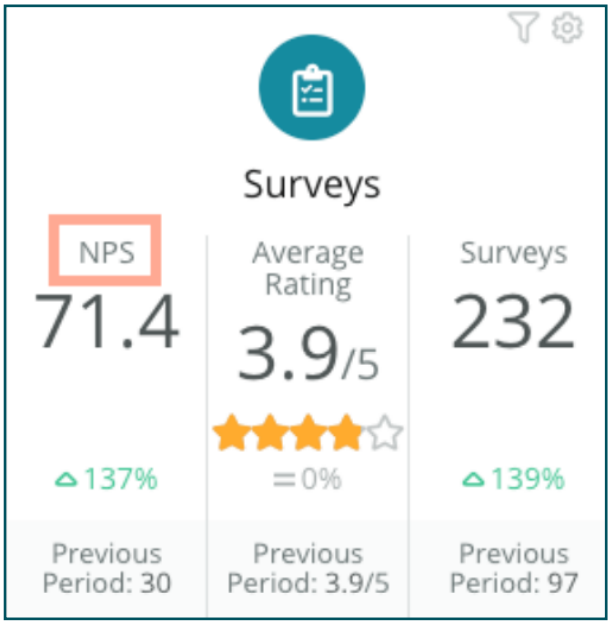
The **Summary** dashboard provides benchmarks for the solutions your account has enabled. If you selected a specific location from the map dashboard, the location filter is already set. Not all solutions may be available to your account.

Reputation Score



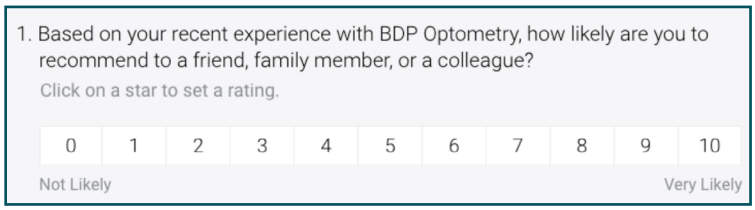
Displays the Reputation Score for the selected period. Below the results, the industry average and best in class scores are available to see comparisons. Additionally, the account's score for the previous time period is also available for comparison.

Surveys



Displays Net Promoter Score (NPS), average star rating, and volume for survey submissions (different from online reviews) from surveys. Below the results, the percent change is indicated based on the previous comparable period selected.

Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend the products and services to others. This score is based on an "NPS" survey question type as shown in the image below:



Customers who give a six or below are detractors, a score of seven or eight are called passives, and a nine or ten are promoters. To calculate the Net Promoter Score, the system detracts the percentage of detractors from the percentage of promoters. So, if 50% of respondents were promoters and 10% were detractors, the Net Promoter is a score of 40.

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Reviews



Displays the average star rating and volume of reviews for the selected filters.

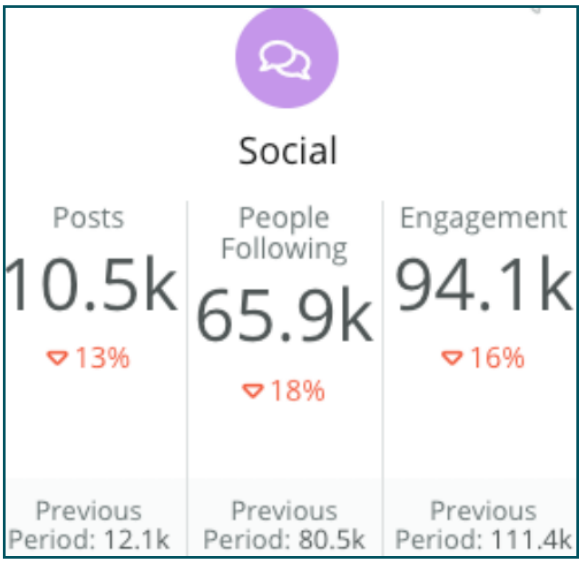
Below the results, the percent change is indicated based on the previous comparable period.

Listings



Displays the listing views and actions taken with regards to clicks to phone calls, clicks to driving directions, and website visits invoked from the business listings.

Social

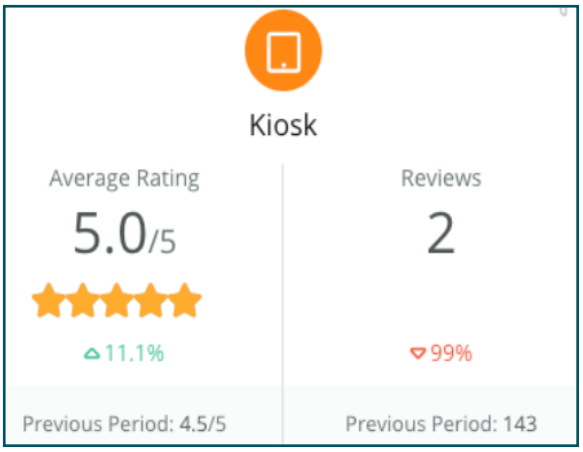


Displays social metrics for total posts, number of followers, and total engagement (e.g., comments, likes).

Below the results, the percent change is indicated based on the previous comparable period.

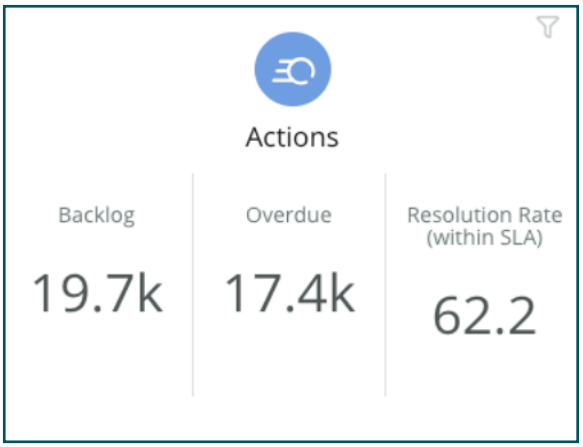
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Kiosk



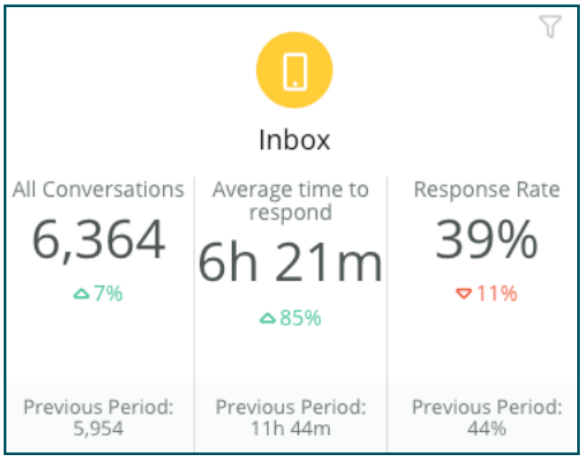
Displays review results submitted from Kiosk-enabled systems (legacy feature). The number of reviews refer to completion of the onsite (first party) survey.

Actions



Displays actions metrics for ticket backlog, number of overdue tickets, and the percentage of tickets closed on time.

Inbox



Displays metrics for quantity of conversations, average time to respond, and response rate.

Below the results, the metric indicated is based on the previous comparable period.

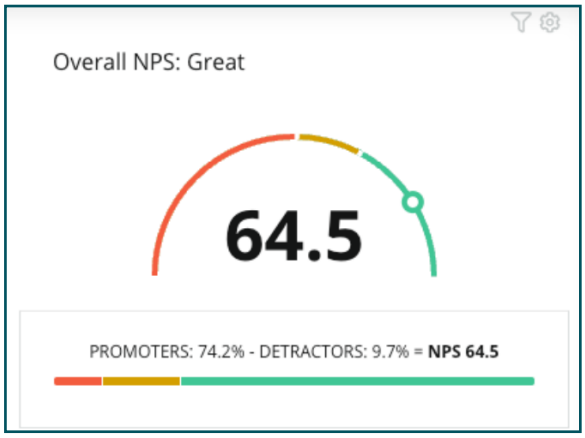
Note: Use the filters at the top of the page to sort through data. Customize the filters in Summary, as well as any of the dashboards within the platform.

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Surveys Dashboard

The **Surveys** dashboard provides a high-level overview of performance across your active surveys. This dashboard includes dashboard widgets that allow for aggregation of all data from all surveys. Customize each widget to view selected surveys in the dashboard.

Overall NPS



Displays the overall NPS for the surveys selected. View the percentages of promoters and detractors.

NPS Trend

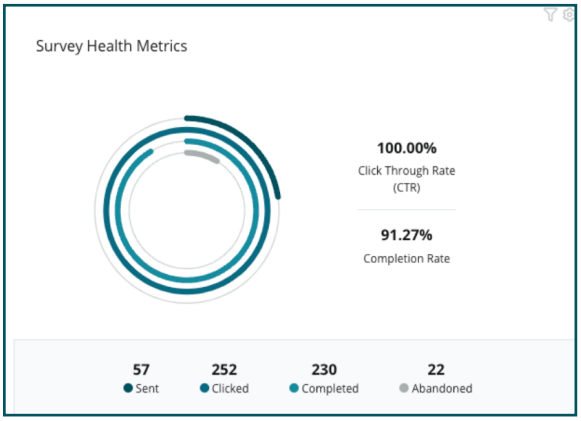
Displays the NPS over time for the surveys selected. Hover over the chart to view NPS data for each period.



Note: Adjust the Customize settings for Overall NPS and/or NPS Trend to view star rating as the KPI type instead of NPS.

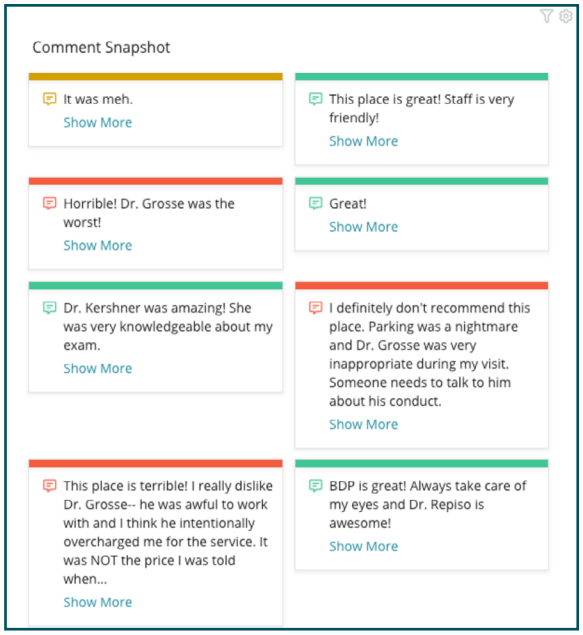
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Survey Health Metrics



Displays click-through rate and completion rate for all surveys selected. View metrics for sent, clicked, completed, and abandoned at the bottom of the widget and by hovering over the circles in the chart.

Comment Snapshot



Displays comments from the surveys included in the selected filters.

1. Click **Show More** to view the full comment and rating provided.

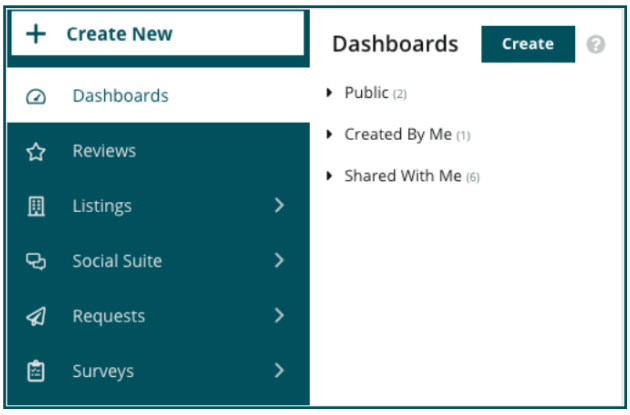
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2 | Customize Existing Dashboards

Customize Existing Dashboards

Combine widgets from each solution into a custom dashboard.

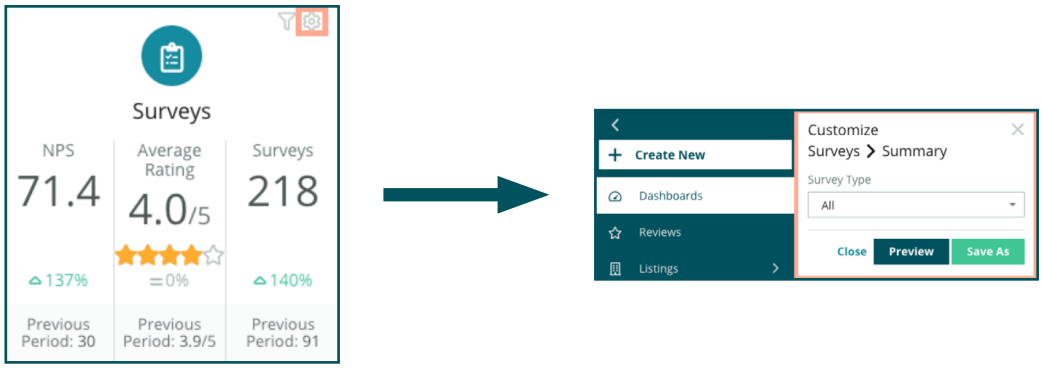
The Dashboard menu is broken into three categories:



- **Public**: System dashboards available for customization.
- **Created By Me**: Custom configured dashboards.
- **Shared With Me**: Custom dashboards that were configured by someone else in your organization.

To access the Dashboards:

1. Expand the Dashboard menu by clicking the expand arrow on the left side of the screen.
2. Click a dashboard to open it.
3. Hover over a dashboard widget for additional configuration options:
   - **Override Filters**: Filter only the data in the widget based on different settings than the top-line filters.
   - **Customize**: Apply custom settings to the widget, such as title and other settings specific to each widget.



4. Preview the changes to see them reflected in the dashboard live or click **Save As** to save them under a new dashboard.

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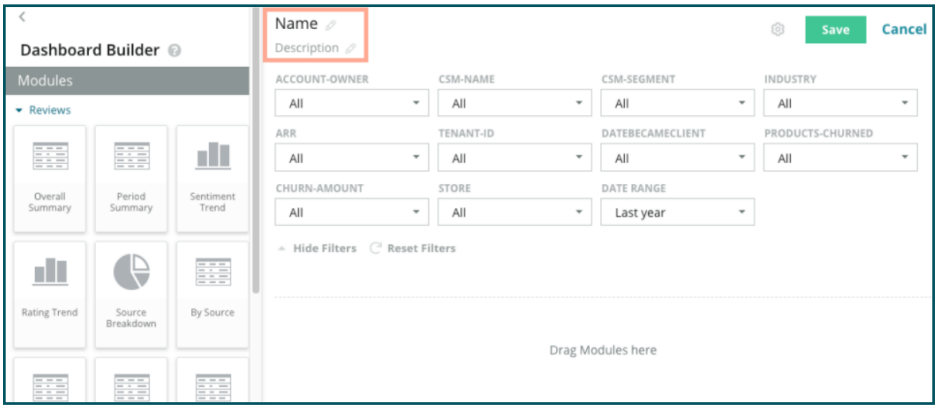
3 | Build Custom Dashboards

Build Custom Dashboard

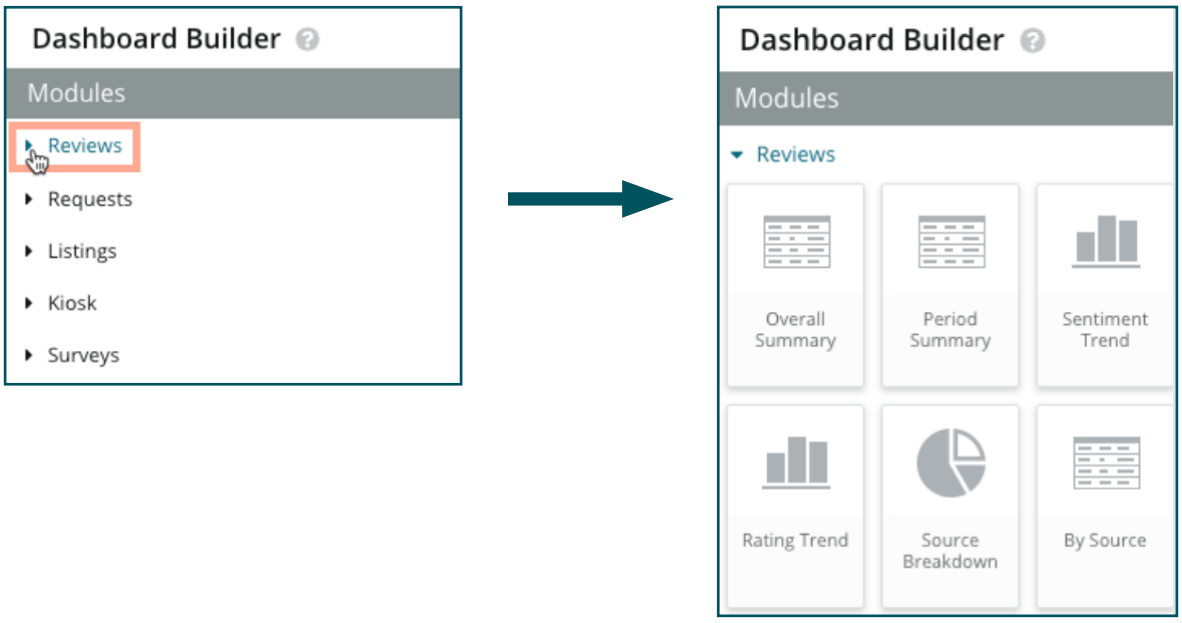
Create a custom dashboard including the metrics that matter most.

How to Create a Custom Dashboard

1. From the Dashboards menu, click **Create**.
2. In the **Dashboard Builder**, add a **Name** and **Description** for the dashboard.
3. Set the filters to apply to the widgets.



4. From Modules list, expand the module for use, and then drag and drop the widget(s) onto the dashboard. Create multiple columns by rearranging on the screen.



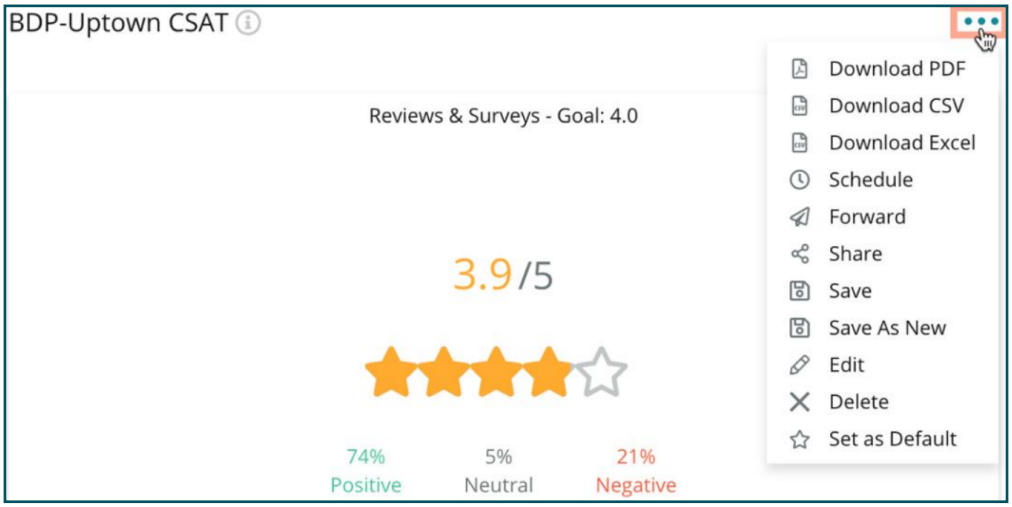
5. Click **Save**.

   - The dashboard appears under the **Created By Me** heading on the Dashboard homepage.

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Dashboard Options

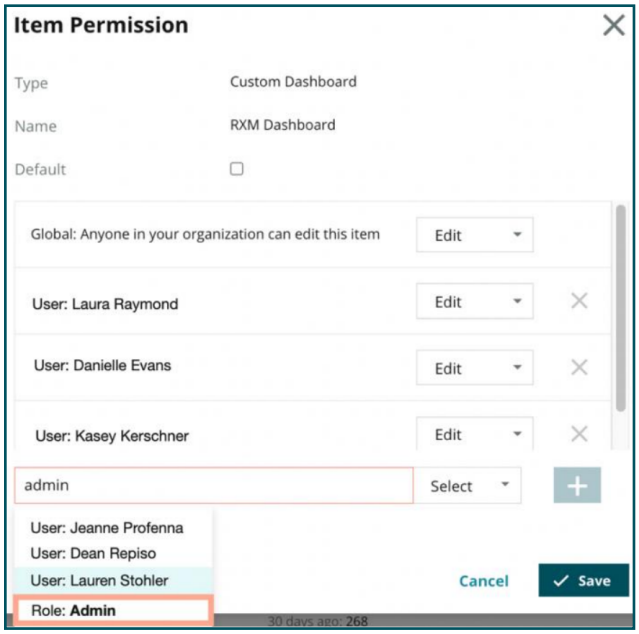
To access additional options, click the ellipses in the top, right corner of each dashboard.



The dashboard options are defined as follows:

Option	Description
Delete	Remove a custom dashboard from the **Created By Me** section. Public dashboards and dashboards in **Shared With Me** cannot be deleted.
Download PDF	Export the current dashboard into a PDF report. The Title Page of the report includes the account logo, name of the dashboard, time period selected, and locations selected.
Download CSV	Export the current dashboard data into a CSV format. A zip folder downloads containing an individual CSV file for each widget in the dashboard.
Edit	Make changes to an existing custom dashboard.
Forward	Send the current dashboard to other users within the platform (individual or role) or email addresses outside the account via email with a PDF or CSV attachment. Specify a Subject and Message to include in the body of the email.
Schedule	Create a scheduled report to automatically send an email with the current dashboard as a PDF or CSV attachment to other users within the platform (individual or role) or email addresses outside the account. Specify a report Name, Frequency (Daily, Weekly, Monthly, Quarterly, Yearly), Format, and Message to include in the body of the email. Edit scheduled reports from the **Reports** tab.

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Option	Description
Share	Share the dashboard with others in the organization. Search for the user or role to set permissions for, and then set the desired permission (None, View, Edit). Click **+** to add the permission and **Save** when finished. The dashboard displays under the **Shared with Me** menu. 
Save	Save the changes made to the dashboard.
Save as New	Create a copy of an existing dashboard. Add a name and description for the copy, set a delivery schedule (if desired), and save to continue. The dashboard copy is available under **Created By Me**.
Set as Default	Select one dashboard as the default to show upon logging in to the platform. The system defaults to showing the map dashboard.

Note: Delivery emails include a link to view the report and a link to launch the report within the platform to interact with the data and add customizations (available to users with account credentials). Report links remain live for seven days.

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4 | Use Mobile App

Use the Mobile App

Use the Reputation mobile app to access the Reputation dashboards and other data on the go.

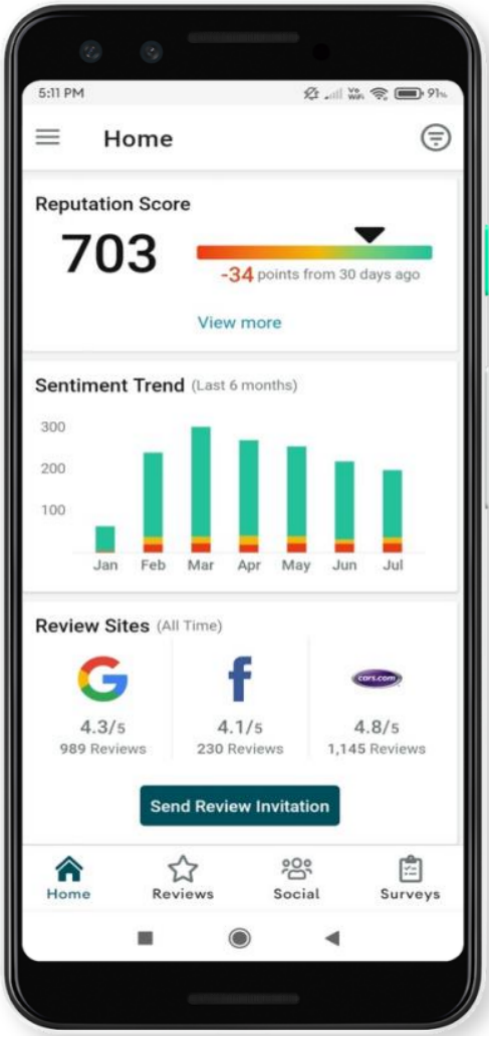
With the Reputation mobile app available in the Google Play Store and Apple's App store, easily access the data and view the dashboards with multiple ways to log in, including a Magic Link option, email and password entry, and Single Sign On.

The **Home** page provides an overview of performance metrics across the solutions enabled for locations. See the Reputation Score; a Sentiment Trend of reviews; All Time metrics, including Average Rating and Volume of Reviews; trend data for connected social accounts; and survey metrics, including NPS Average Rating and Volume of Surveys.

In addition to viewing the data on the mobile device, the Reputation mobile app allows for convenient reputation management in the following ways:

- Monitor, respond, forward, and reply to reviews from third-party sites.
- Request reviews for specific locations.
- Create content, manage conversations, and reply to comments on connected social sites.
- Take action on tickets by adjusting queues, stages, and tags, updating comments, adding attachments, or closing tickets.
- Create new tickets as needed.
- Manage and respond to survey feedback, or forward surveys to a team member.

Download the free Reputation mobile app through the Google Play Store or Apple's App Store to start accessing information on the go.



Contact your Account Executive or the Support Team for more information.

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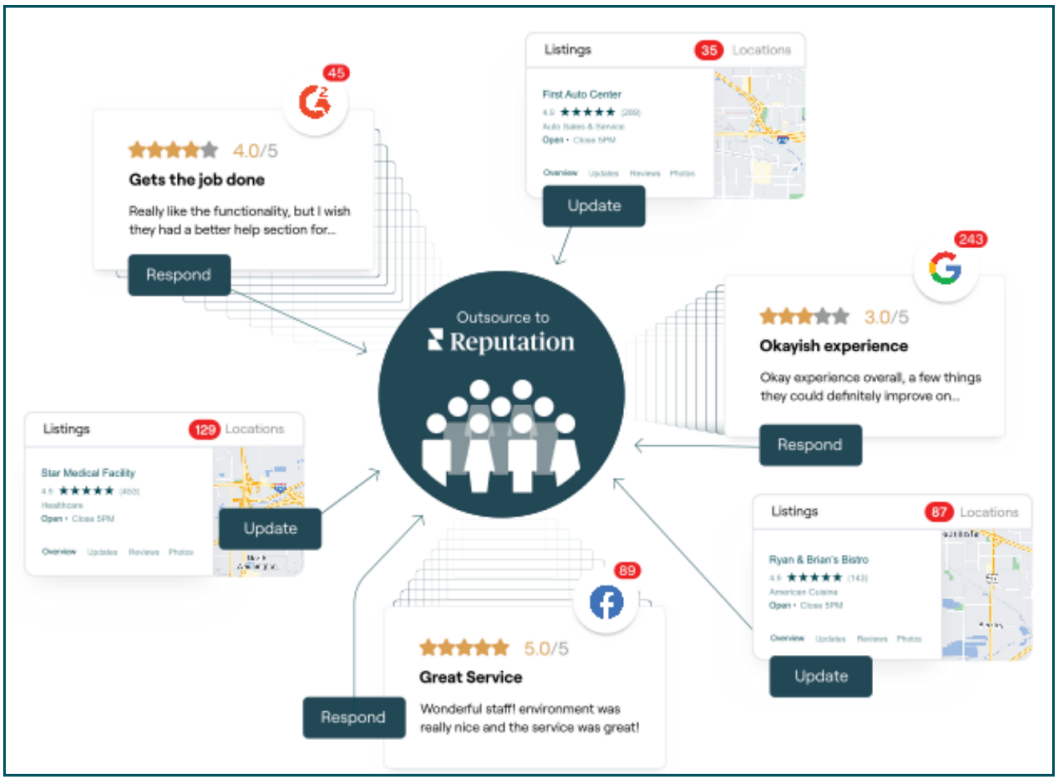
5 | Premium Paid Services

Premium Paid Services

Put out Premium Paid Services platform experts to work for you.

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 excellence through this suite of value-added services that are fueled by our platform and products. These experts will help:

- 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)



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6 | Additional Resources

Additional Resources

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

Additional User Guides

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

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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)

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    - 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

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