Inbox

User Guide

Reputation

2025

Table of Contents

1 | Inbox Overview

Inbox Overview

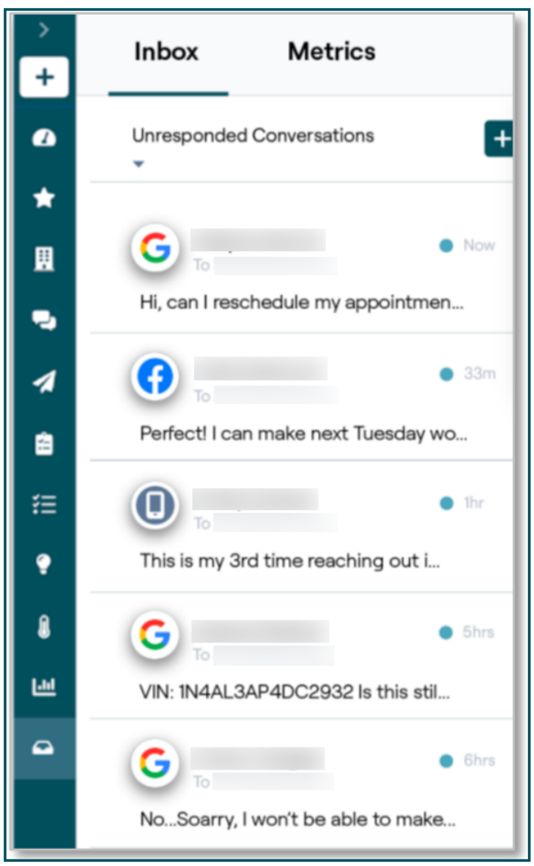
Never miss a conversation with customers.

Maintain seamless customer engagement across public and private communication channels through Inbox, a single-feed command center to track and respond to all customer and prospective customer feedback, by exchanging messages and interacting with customer comments on social media posts.

Reviews, surveys, direct private messages, and social post comments from various sites are supported in one inbox feed to facilitate faster interactions with customers, resulting in a positive customer experience and faster sales.

Exchange messages and interact with customer comments on social media posts. Assign, reply, and close conversations; track leads; analyze metrics; and manage reviews and surveys all within the Reputation platform.

Inbox currently supports the following channels:



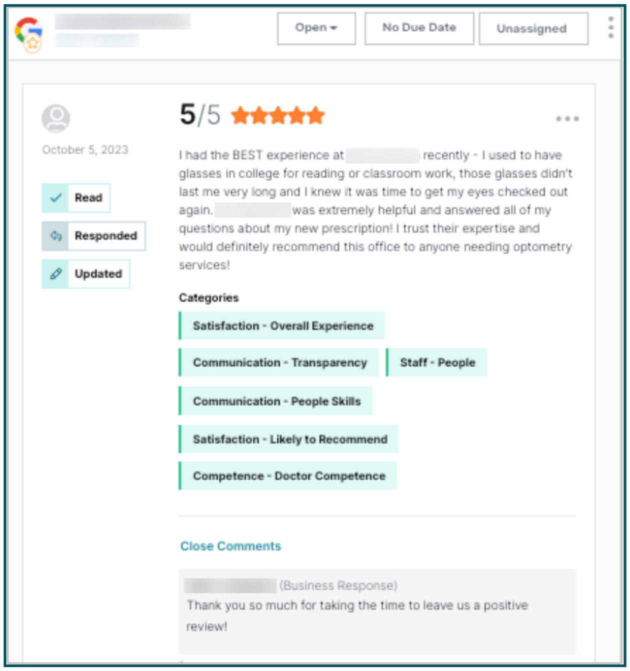
- Feedback:
  - Reviews
  - Surveys
- Direct Messaging:
  - SMS Texting
  - Facebook Business Messages
  - Google Business Messages
  - X (formerly known as Twitter) Messages
- Social:
  - Facebook Comments
  - Instagram Comments
  - X (formerly known as Twitter) Comments
  - LinkedIn Comments

To get started, configure the Inbox, manage the Inbox, and view the Inbox metrics.

Configure the Inbox

Before using Inbox, set up messaging sources, extend user access, and create notifications to ensure messages are never missed. For more information, see Configure the Inbox on page 8.

Manage the Inbox



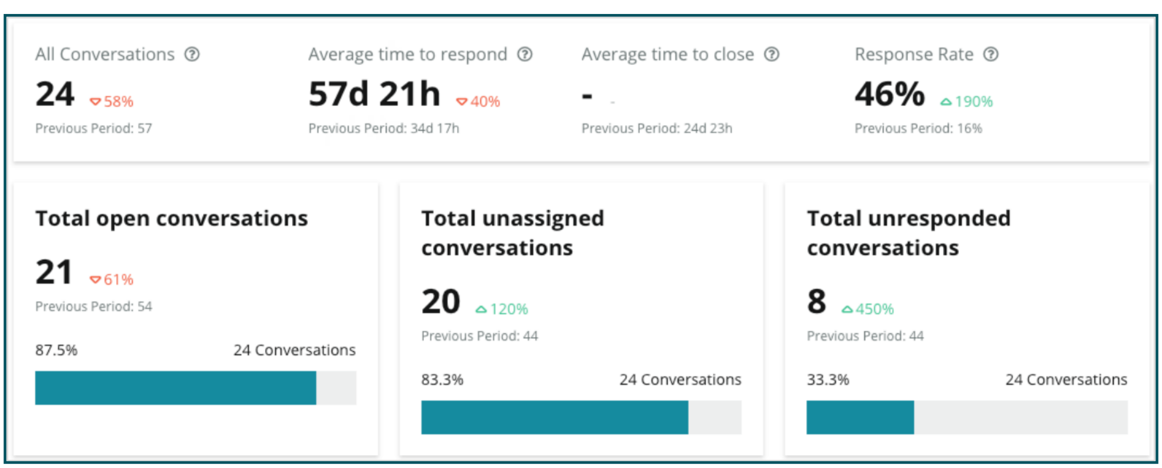
Start SMS conversations, send SMS review requests, and assign conversations for specific users to manage. Mark each conversation as read, flagged, or closed to manage the inflow of customer conversations.

Reply to customer conversations using templates, emojis, variables, and attached files, or add a private note to the conversation for internal purposes only.

For more information, see Manage the Inbox on page 18.

View Inbox Metrics

The **Inbox Metrics** tab reports on average response and time to close metrics in addition to conversation total, team, and location-specific metrics to help investigate trends in the messages and team efforts. For more information, see Inbox Metrics on page 27.



2 | Configure the Inbox

Configure the Inbox

Set up messaging sources, extend user access, and create notifications to ensure a message is never missed.

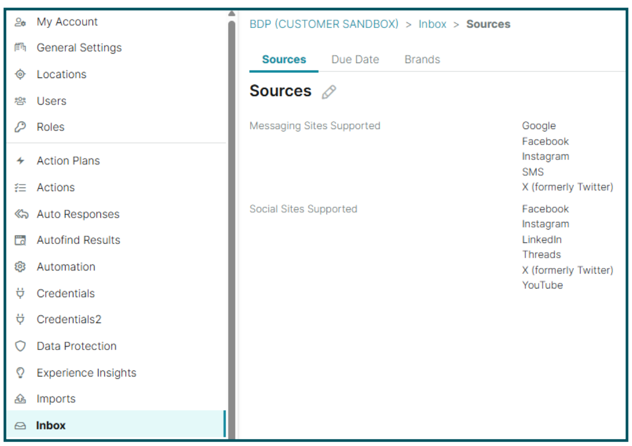
Set Up the Inbox

To set the sources, automatic due dates, and brands, user admin permissions are required.

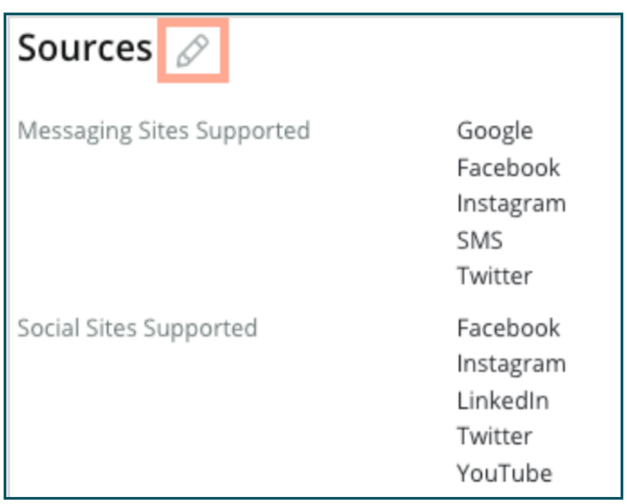
1. Click the gear icon in the top right corner to open the general settings.
2. From the left menu, select **Inbox**.

Sources

Determine the source(s) to populate messages in the Inbox.

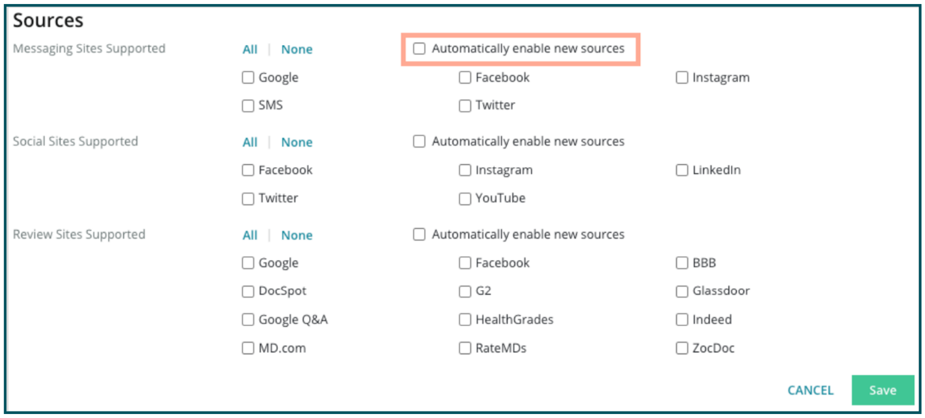


1. Under the **Sources** tab, view the sources already connected to the Inbox, sorted by the specific supported sites.



2. Click the edit icon to add or remove source connections.

3. Select the sources to connect to the Inbox, or check **Automatically enable new sources**.

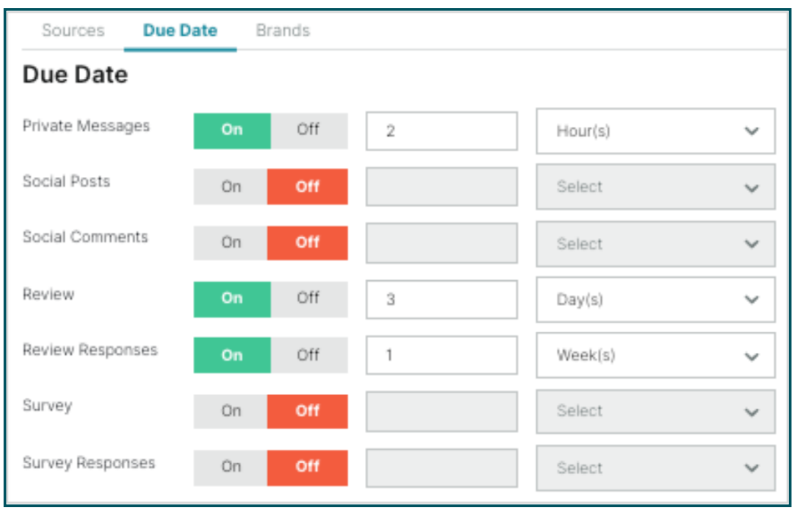


4. Click **Save**.

Automate Due Dates

To set automatic due dates for responding to incoming messages:

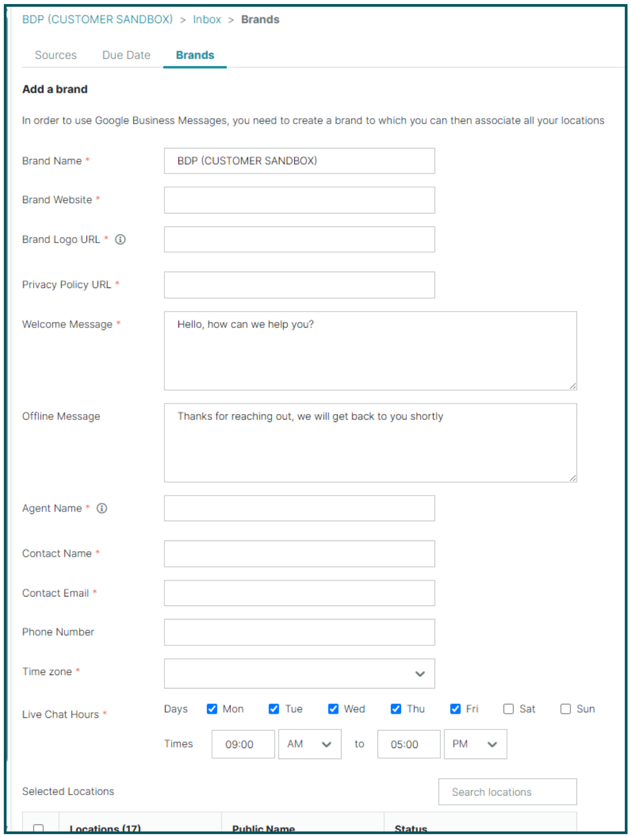
1. Select the **Due Date** tab.
2. Toggle the sources **On** to determine the automatic due dates.



3. Adjust the time frame accordingly and click **Save**.

Brands

To connect Google Business Messages to Inbox, create a brand to associate with all the business locations.



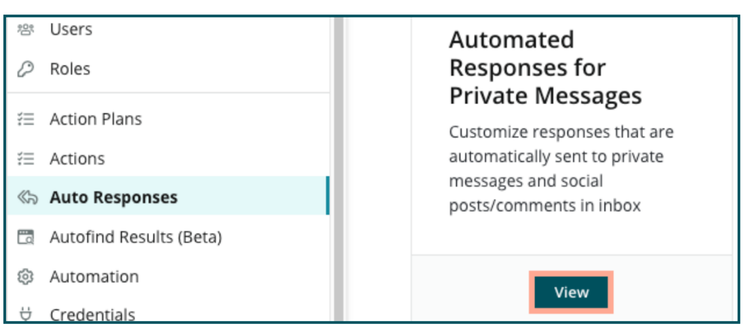
1. Select the **Brands** tab.
2. Click **Add Brand**.
   a. Click the pencil icon to edit a brand or the x to delete a brand from the list.
3. Enter the brand name, website, logo, and URL to the privacy policy.
4. Enter a welcome message and an automatic response message for offline hours.
5. Enter an agent name (the name of the location), contact name, email, phone number, and time zone.
6. Select the days and hours for when live chat is available.
7. Select the location(s) this brand applies to.
8. Check the box to agree to the **Google Business Messages Acceptable Use Policy**.
9. Click **Save**.

Set Automated Responses

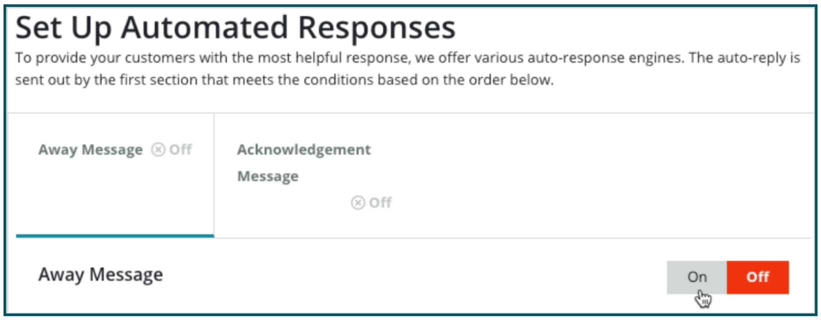
To set up automated responses, user admin permissions are required.

Instantly respond to a customer when they message outside of business hours. As most customers anticipate immediate responses when sending a message to businesses, setting an Away Message and/or Acknowledgment Message is considered a best practice and will help with response metrics.

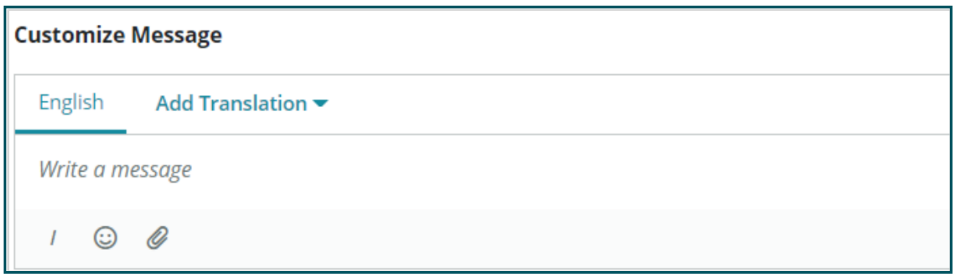
1. Click the gear icon in the top right corner to open the general settings.
2. On the left side panel, select **Auto Responses**.
3. Click **View**.



4. Toggle the **Away Message** from Off (default) to **On**.



5. Hours are set as 8 am–5 pm by default. Adjust as needed. Scroll down to add an Automated Response.



6. Click **Save**.

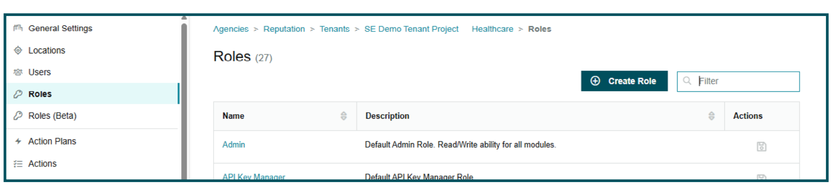
Configure Response Approval

To set up response approval, user admin permissions are required.

Create an extra step to approve or reject responses before they become live. This step requires a role with permissions to respond from the Inbox and a role to approve the response.

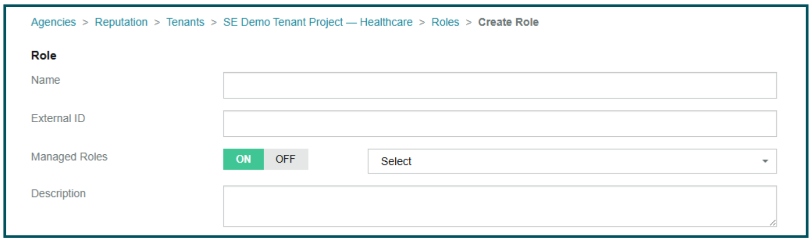
To set permissions for a role to respond from the Inbox,

1. Click the gear icon in the top right corner to open the general settings.
2. On the left side panel, select **Roles**.
3. Click **Create Role**.

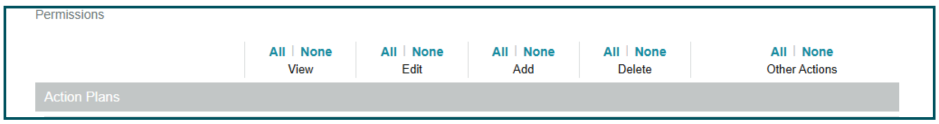


- If a current role is already available, click the edit icon to edit the permissions.

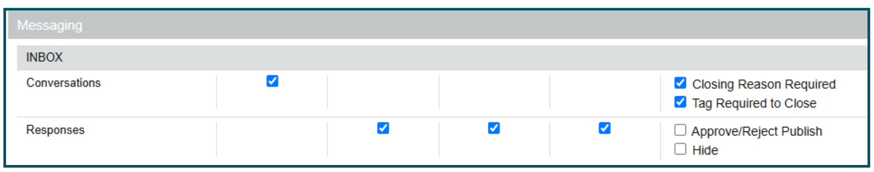
4. Name the role and turn the **Managed Roles** off.
    a. Include the External ID and Description as needed.



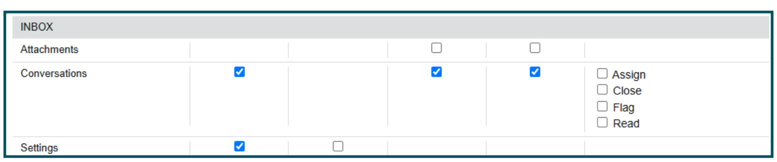
5. Scroll to the following sections to select the correct permissions.
    - The checkboxes in each column represent the **View**, **Edit**, **Add**, **Delete**, and **Other** permissions in order from left to right.



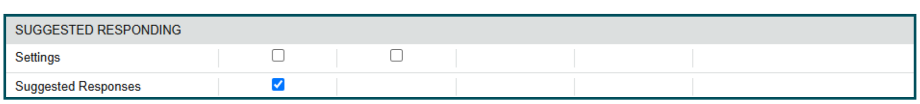
    a. Under **Messaging**, check all the boxes except **Approve/Reject Publish** and **Hide**.



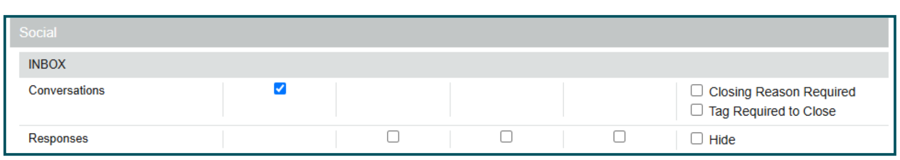
    b. Under **Platform** > **Inbox** > **Conversations**, check the **View**, **Add**, and **Delete** permissions.



    c. Under **Platform** > **Inbox** > **Settings**, check the **View** permission.
    d. Under **Platform** > **Suggested Responding**, check **Suggested Responses**.



    e. Under **Social** > **Inbox** > **Conversations**, check **View**.

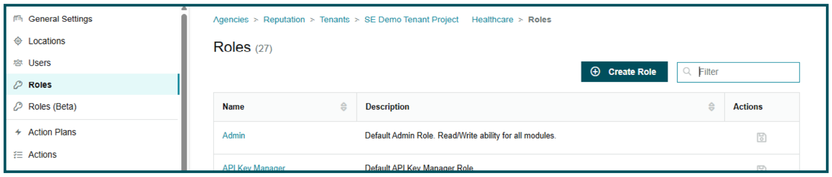


6. Click **Save**.

To set permissions for a role to approve responses,

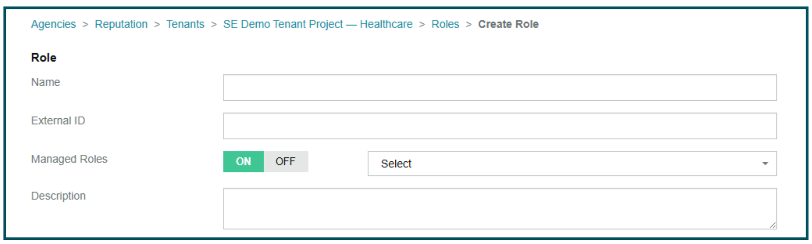
1. Click the gear icon in the top right corner to open the general settings.

2. On the left side panel, select **Roles**.
3. Click **Create Role**.



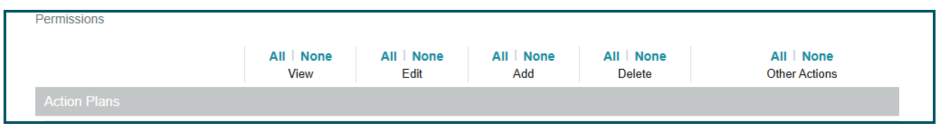
- If a current role is already available, click the edit icon to edit the permissions.

4. Name the role and turn the **Managed Roles** on.
   a. Select the roles that will require a response approval (e.g., the role created in the steps above).
   b. Include the External ID and Description as needed.

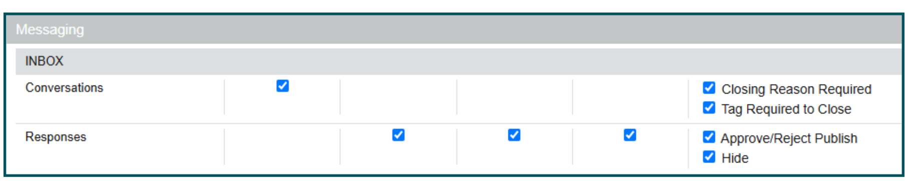


5. Scroll to the following sections to select the correct permissions.

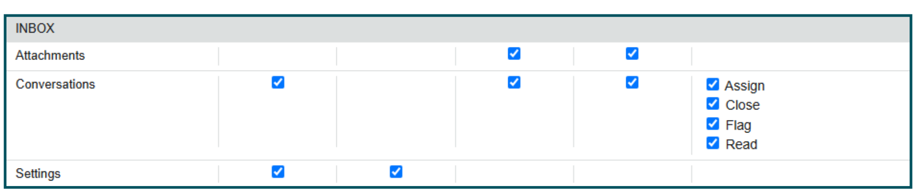
- The checkboxes in each column represent the **View**, **Edit**, **Add**, **Delete**, and **Other** permissions in order from left to right.



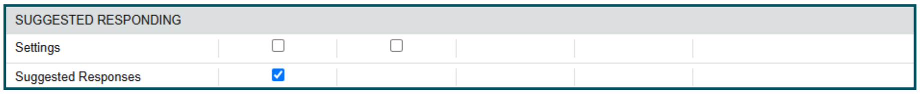
   a. Under **Messaging**, check all the boxes.



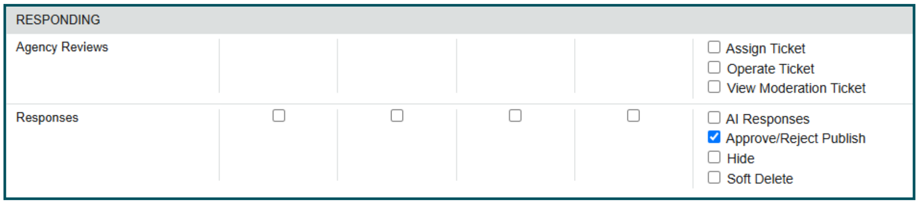
   b. Under **Platform** > **Inbox**, check all the boxes.



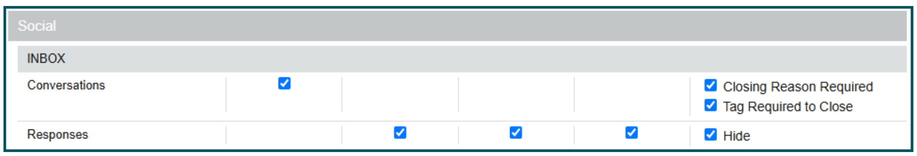
c. Under **Platform** > **Suggested Responding**, check **Suggested Responses**.



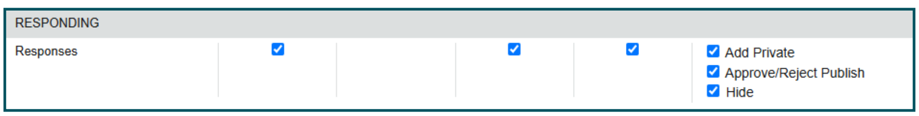
d. Under **Reviews** > **Responding**, check **Approve/Reject Publish**.



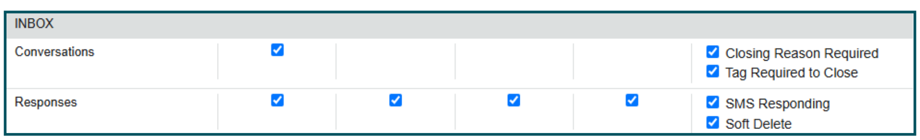
e. Under **Social** > **Inbox**, check all the boxes.



f. Under **Social** > **Responding**, check all the boxes.



g. Under **Surveys** > **Inbox**, check all the boxes.



6. Click **Save**.

Configure the Inbox Notifications

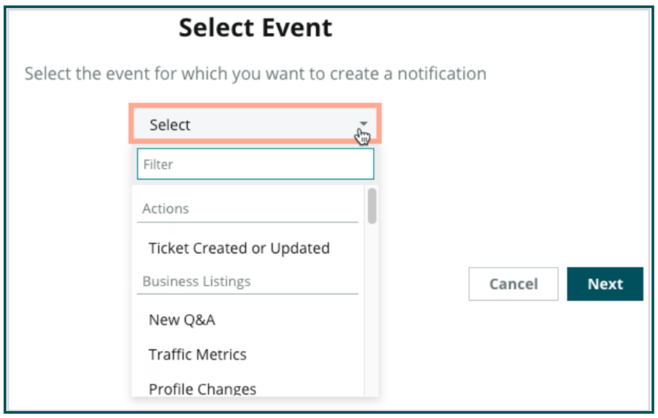
To configure notifications, user admin permissions are required.

Build notifications for individual users or roles to ensure the proper teams take action when there are new messages and when they have been assigned a conversation.

To configure channel specific notifications:

1. Click the gear icon in the top right corner to open the general settings.
2. From the left side menu, go to **My Account** > **My Notifications**.

3. From the Notification Settings, click **Create Notification**.
4. From the **Select Event** dropdown, select the event to create a notification for.



- For example, scroll through the options and choose **New Inbox Message**.

5. Click **Next**.
6. Modify the notification settings.

- **Rule Name**: Set a name for the notification to help identify it in the list.
- **Channel**: Alerts for the channel are delivered. Options include Email, SMS, Mobile Push Notification, and Platform Notifications Tray.
- **Frequency**: The frequency of the alert. Immediate is the only option at this time.
- **Email Subject**: Choose the subject line of the email when it arrives in the inbox. Inserting variables identifies the source, location, or other information about the message to help manage/group multiple alerts arriving in the inbox.
- **Email Custom Message**: Enter verbiage to add to the beginning of the email, which can be used to set context for why the alert was sent or what the expectation is for taking action.
- **Alert For**: Receive alerts for all locations (click **All**), or select individual locations. If there is more than one **Alert For** filter option, the account has custom filters to customize segments to associate with the alert.
    - If authorized locations are already specified in the user profile, do NOT specify them again in the alert settings. The user profile level automatically cascades location settings to all related alerts, which prevents modifying individual alert properties.

When location settings within an alert are modified, changes at the user profile level no longer apply to the selected alert.

- **Type**: Check the boxes to determine which channels receive notifications.

7. Click **Save**. The alert becomes active for the selected channel(s) when the notification conditions are triggered.

3 | Manage the Inbox

Manage the Inbox

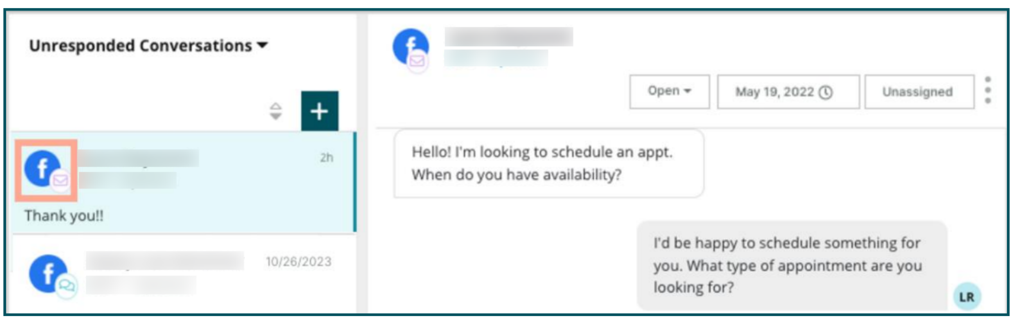
Communicate with customers through their channel of choice and close the loop in real time.

Interact with customers through several channels in Reputation's Inbox. Under the **Inbox** tab, the feed on the left side displays a complete list of all interactions, including customer reviews from third-party sites, survey responses, comments and posts from the business's social media accounts, and direct message conversations.

Note: Depending on the business or user permissions, the view may look different and contain only certain sources. Refer to Configure the Inbox on page 6 for more information.

Differentiate the source of interaction in the Inbox feed by the larger icon, as well as the type of message by the smaller icon.

For example, the image below shows a Direct Message the customer sent via Facebook.

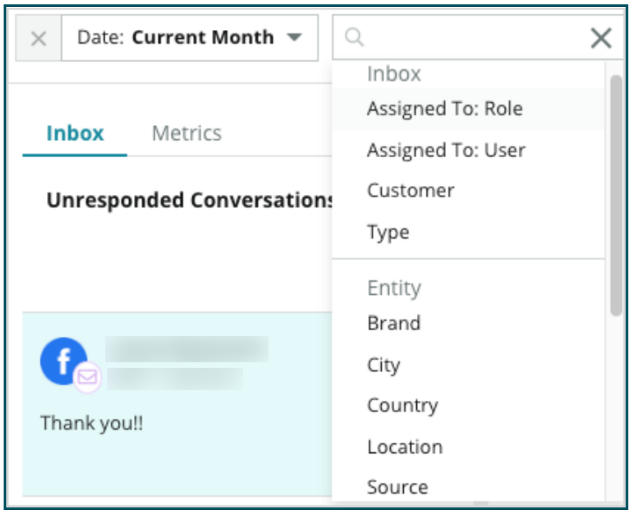


Use Filters

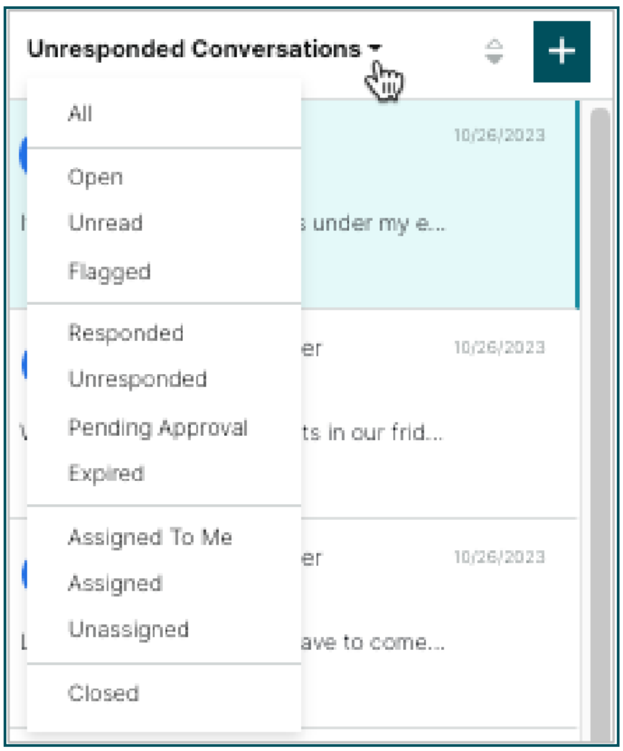
Top-line filters affect the data shown on the tab. Apply multiple filters to narrow the focus, including messages assigned to a specific team member, messages from a specific customer, and messages using a selected request template.

1. Click **+ Add Filter** at the top of the page to show filters.

2. Scroll through the various filters to sort the messages within the Inbox.

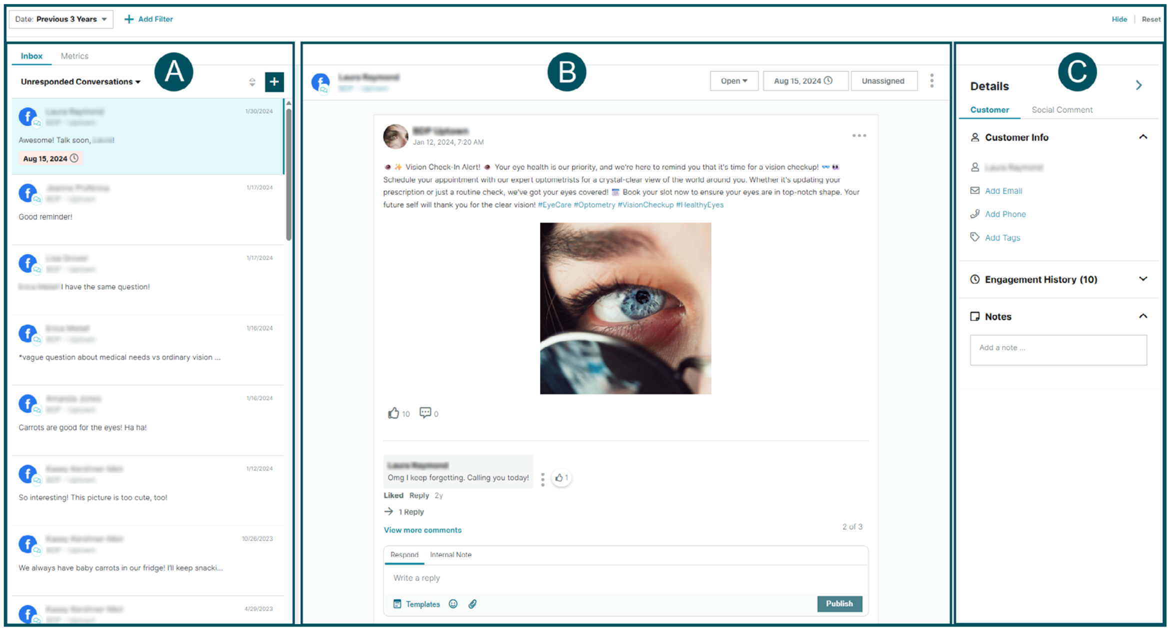


3. To view secondary filters, click the triangle icon next to the **Conversations** dropdown.



Manage Conversations

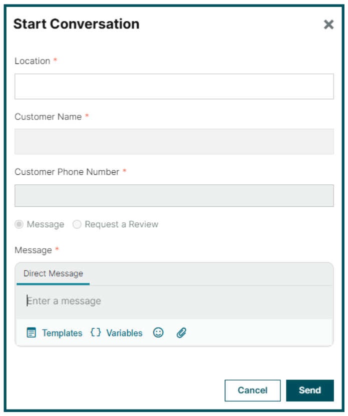
Click a conversation to start interacting. Conversations come from configured SMS, Facebook, or Google Business Profiles accounts. Social posts and comments are also in the Inbox.



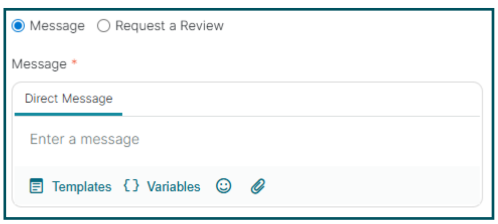
	Column	Description
A	Conversations	The list of available conversations. Create a new conversation if needed. For more information, see Conversations on page 21.
B	Conversation Summary	View the post/message and post replies. For more information, see Conversation Summary on page 22.
C	Details	View details about post and poster. View the engagement history and any internal notes. View the Social Comment information. For more information, see Details on page 24.

Conversations

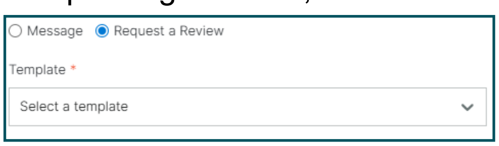
1. Open a conversation from the list or create a new conversation.
2. To start a conversation, click the **+** icon.
    a. Enter the **Location**, **Customer Name**, and **Customer Phone Number**.



    b. Choose to send a **Message** or **Request a Review**.
        ○ If sending a message, type the message or insert a template, emoji, variable, and/or attachment.



        ○ If requesting a review, select the request template from the dropdown menu.



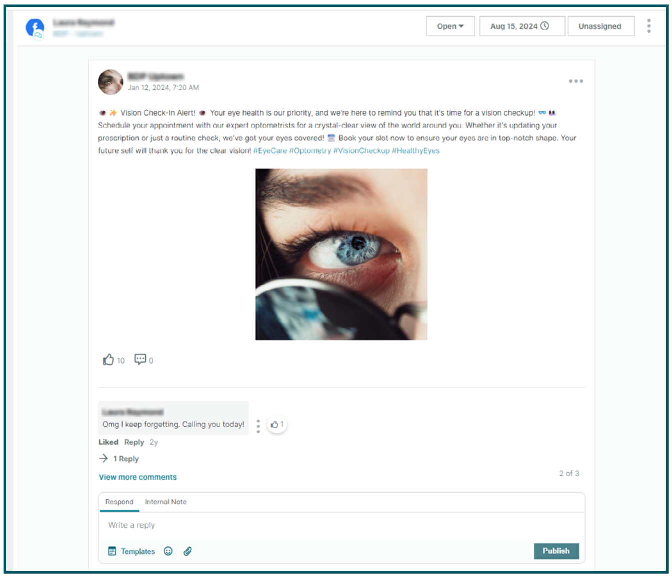
3. Click **Send**.

Conversation Summary

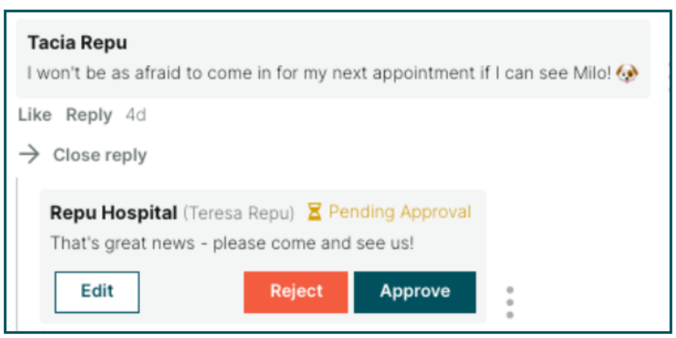
Open a conversation in the summary panel to see the post/message, the post reactions, download the media, or reply to the post/message.

Use the options at the top to mark a conversation as Open or Closed, set a due date for a response to the message, and assign the selected conversation to a user in the platform.

Reply to a Conversation



1. Reply to the conversation within the text box. Type the message directly into the text box, or:
   a. Click **Templates** to insert a template.
   b. Click the smiley face to include emojis.
   c. Click the paper clip icon to attach a file to the response.
2. Click **Publish** to send the message to the customer.



a. Depending on permissions the response may need to be approved before it is published.
   - For more information about response approvals, see Configure Response Approval on page 11.

b. Add conversation notes under the **Internal Note** tab.
   - The internal notes are not sent, or visible, to the customers.

Open or Close a Conversation

To set a conversation as open or closed,

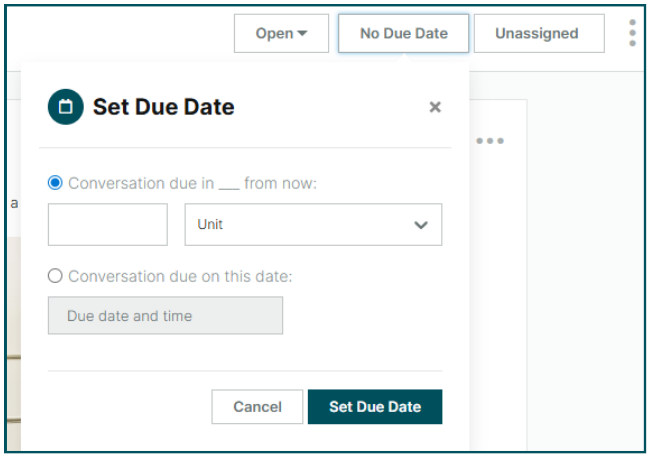
1. Click the **Open** dropdown and select **Open** or **Closed**.

Set a Due Date

To set a due date for a conversation,

1. Click the date at the top of the conversation summary.

2. Select **Conversation due in __ from now** or **Conversation due on this date**.



   a. Enter how many hours, days, weeks, or months the conversation response is due in.
   b. Enter the date and time the response to the conversation is due.

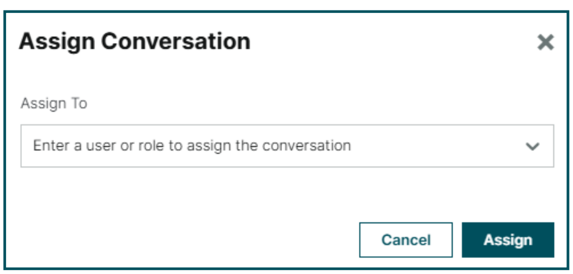
Note: As an alternative to setting individual due dates per conversation, set automatic due dates within Admin settings. Refer to Automate Due Dates on page 9 for more information.

Assign a Conversation

To assign a conversation,

1. Click **Unassigned**.

   a. Begin typing the user's name, select it from the list, and click **Assign**.



      ○ Users are automatically notified via email upon assignment.

To unassign a conversation,

1. Click **Assigned**.
2. Click the **X** next to the person's name.
3. Click **Assign**.

Additional Actions

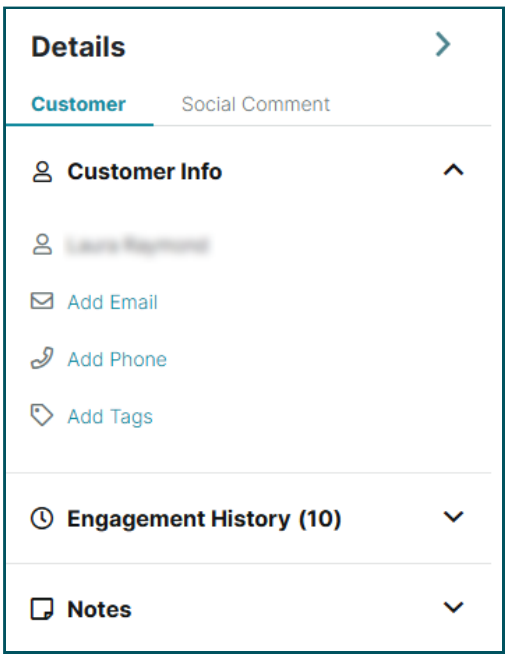
The available additional actions depend on the role permissions of the user.

To explore additional actions for the conversation,

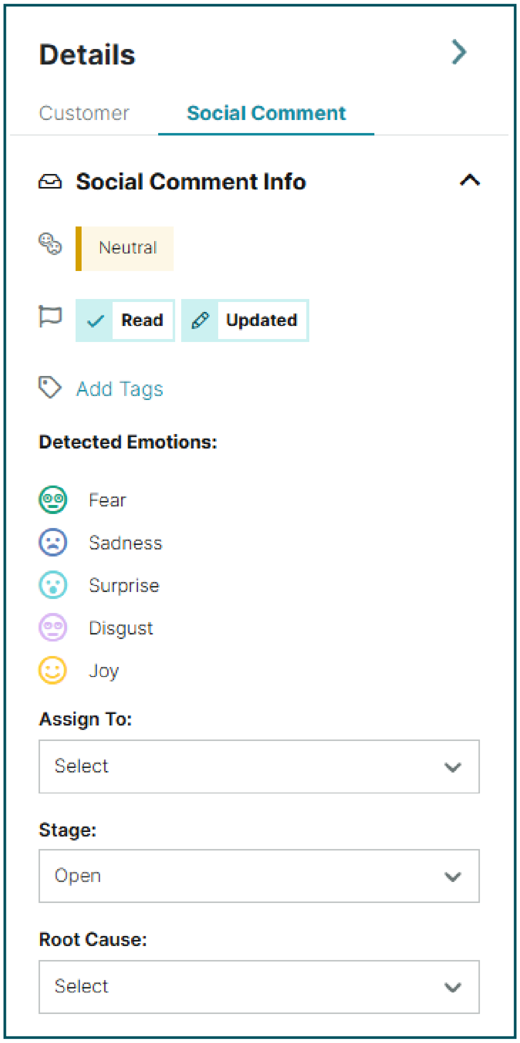
1. Click the ellipsis in the top right corner of the conversation summary or in the top right corner of each conversation in the left column.
    a. Click **Read**/**Unread** to mark the conversation.
    b. Click **Flag**/**Unflag** to flag to conversation.
    c. Click **Close** to close the conversation from the conversation summary panel.
    d. Click **Block User** to block the user from the Inbox.
        - Blocking a user through the platform will also block them on the source site.
        - This action only applies to Facebook and X (formerly known as Twitter).

Details

View the customer information saved in the platform for the conversation.



1. Under the **Customer** tab, click to edit the customer's name, email, phone number, or tags.
    a. Explore the engagement history with the customer or add internal notes to the team.



2. Under the **Social Comment** tab,
    a. View the conversation status and tags.
    b. View the prominent sentiment in the conversation.
    c. Assign the selected conversation to a specific category (e.g., general, insurance question, appointment request, etc.).
    d. Set the conversation as open or closed.
    e. Select the root cause to further define the conversation's category.
    f. Add notes about the conversation.

4 | Inbox Metrics

Inbox Metrics

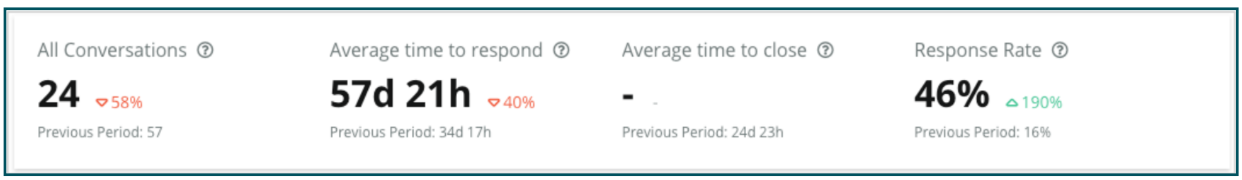
Use Inbox Metrics to help set internal KPIs for messaging activity.

The **Inbox Metrics** tab displays charts and graphs to investigate trends in the messages and team's resolution efforts. Understand how many conversations are being managed, as well as response and time to close metrics. Monitor conversation assignment metrics as well as team performance by user and location.

Inbox metrics are also available under the **Reports** module.

Summary Area

This dashboard shows metrics for the quantity of conversations, the average time it took to respond and close the conversation, and the response rate.



Metric	Description
All Conversations	Total of all conversations created in the selected period. View the percent change and value of the previous period.
Average Time to Respond	The average time it takes to respond to customer messages in the selected period. View the percent change and value of the previous period.
Average Time to Close	The average time it takes to close customer messages in the selected period. View the percent change and value of the previous period.
Response Rate	The percentage of customer's messages that have been responded to in the selected period. View the percent change and value of the previous period.

Note: If the customer replies after the message has already been closed, it reopens in the original conversation and begins the time to respond/close from zero.

Conversation Totals

Understand the percentage of open, unassigned, and unresponded conversations in the selected timeframe.

Total open conversations	Total unassigned conversations	Total unresponded conversations
21 ▽61%	20 △120%	8 △450%
Previous Period: 54	Previous Period: 44	Previous Period: 44
87.5% — 24 Conversations	83.3% — 24 Conversations	33.3% — 24 Conversations

Conversation Performance

Measure conversation metrics by location, team member, and source. View the quantity of open, assigned, and unresponded conversations as well as the average time to respond, average time to close, and response rates.

Location Performance

Location	All Conversations	Open	Assigned	Unresponded	Responded	Closed	Average time to respond	Average time to close	Response rate
BDP - Flagstaff (B011)	122	122	-	119	3	-	8d 1h	-	2%
BDP - Sun City (B004)	16	16	-	14	2	-	6d 13h	-	13%
BDP - Uptown (B021)	376	376	-	376	-	-	-	-	-

Team Performance

Team Member	Open	Assigned	Unresponded	Responded	Closed	Average time to respond	Average time to close	Response rate
Dani Evans	1	2	1	3	3	1	-	75%
Dean Repiso	1	-	1	4	4	-	-	64%

Source Performance

Source	All Conversations	Open	Assigned	Unresponded	Responded	Closed	Average time to respond	Average time to close	Response rate
Facebook	90415	88269	-	86041	2731	-	60d 9h	-	3%
Instagram	6761	6761	-	6468	293	-	1d 7h	-	4%
LinkedIn	981	981	-	972	9	-	2d 6h	-	1%
Twitter	1334	1334	-	1237	93	-	20h 44m	-	7%

Metrics Options

To access additional options, click the ellipsis in the top right corner of exportable charts.

Options include:

- Download PDF
- Download CSV
- Schedule
- Forward

Filters that are currently applied to the data set persist to all options. Delivery emails include a link to view the report as well as a link to launch the report within the platform to interact with the data and add customizations (available to users with account credentials).

> **Note**: Operations that take time to process large amounts of data may invoke a pop-up window with the option to either wait for the operation to continue as a download (must stay on the same screen) or to be notified via email with a link to the download (can move to other screens).

Option	Description
Download PDF	Export the current data set into a PDF report. The title page of the report includes the account logo, name of the report, time period selected, and locations selected.
Download CSV	Export the current data set into a CSV format.
Download Excel	Export the current data set into an Excel format.
Schedule	Create a scheduled report to automatically send an email with the current data set 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.
Forward	Send the current data set via email with a PDF or CSV attachment to other users within the platform (individual or role) or email addresses outside the account. Specify a Subject and Message to include in the body of the email.

5 | Use the Mobile App

Use the Mobile App

Use the Reputation mobile app to access the Inbox and other data on the go from a mobile device.

With the Reputation mobile app available in the Google Play Store and the Apple App Store, easily access Inbox, Dashboards, Reviews, Surveys, and more. Login options include a Magic Link, email and password entry, and Single Sign On.

The Home Page provides an overview of performance metrics across the solutions enabled for the business locations. Tap **Inbox** along the bottom panel to view the conversations.

From the inbox:

- Initiate an SMS conversation with a customer.
- View messages from the customers and respond from a mobile device.
- Sort messages by clicking Unread, Flagged, Responded, Not Responded, Assigned to Me, Assigned, or Unassigned.
- Apply filters to sort by source and date range.

Download the free Reputation mobile app through the Google Play Store or the Apple App Store to start accessing the information on the go, or scan the QR codes below.

Android	**iOS**

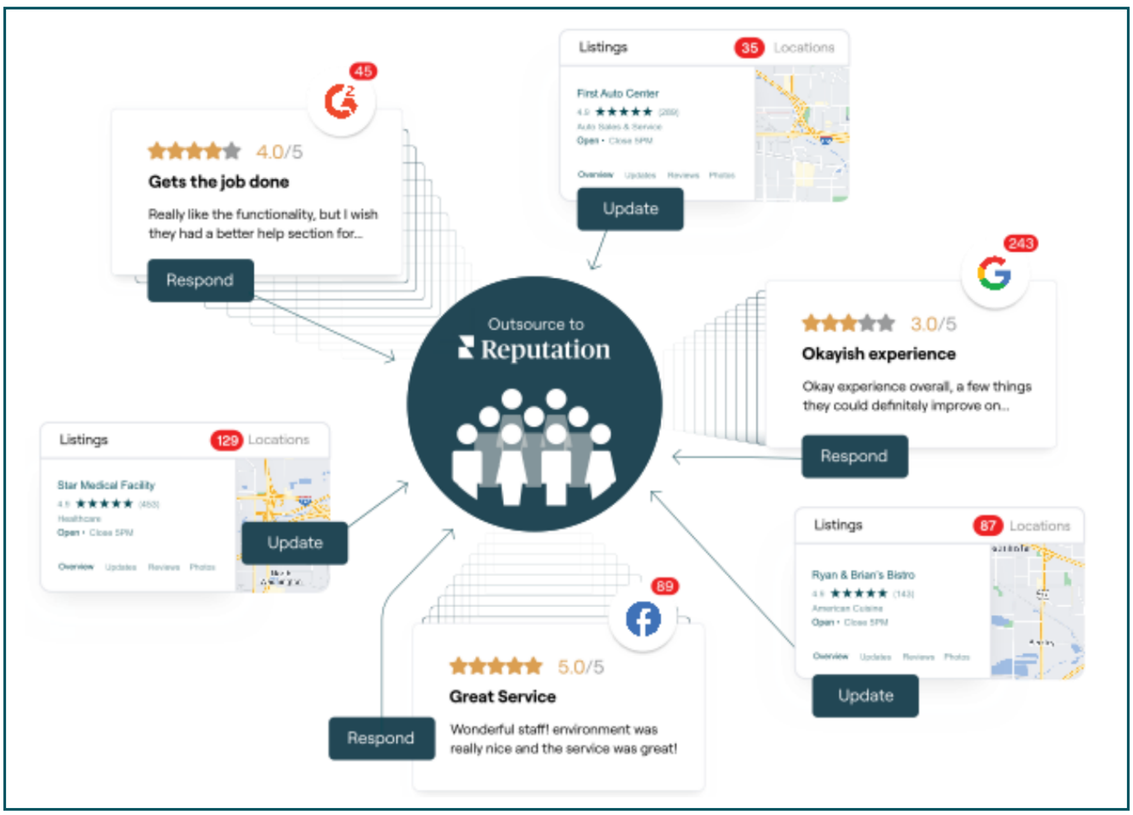
6 | Premium Paid Services

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)

> **Note**: While our Reputation Premium Paid Services team is available to manage customer engagement on social channels, we do not currently service live messaging.



7 | Additional Resources

Additional Resources

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

Additional User Guides

- Actions
- Admin
- Business Listings
- Dashboards
- Engage
- Insights
- Mobile App
- Publish
- Rep Connect
- Reports
- Reputation Score
- 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