Requests

User Guide

Reputation

2026

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1 | Requests Overview

Requests Overview

Use mobile, email, SMS, or web-based requests to meet customers where they are. Request reviews and surveys from every customer to build volume and increase ratings and rankings.

The **Requests** tab displays options for requesting reviews (or surveys) and managing those requests.

Requests include precautions to ensure compliance with the following laws and industry best practices, which cover topics such as over-survey protection, SMS opt-in, and unsubscribe options:

- CAN-SPAM Act
- General Data Protection Regulation (GDPR) ePrivacy
- Telephone Consumer Protection Act (TCPA)
- HIPAA Privacy

Consult legal counsel to discuss how specific laws may apply to your organization and how to ensure compliance.

Feature Overview

Quick Request

The **Quick Request** page sends an email or SMS text message to one or more customers for a particular location. Messages use customizable templates and are invoked from within the platform.

If surveys are enabled for the account, it is possible to initiate conversational surveys through the **Quick Request** page.

Bulk Upload

Use the **Bulk Upload** page to download a CSV template and compile a list of request recipients. Manually upload the file to the platform to send an email or SMS text message to multiple customers for one or more locations.

Review an error report for any requests that could not be sent upon upload completion.

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Leaderboard

The leaderboard ranks locations (1 = highest) to determine top performers by the number of requests sent. A leaderboard is a great way to engage a team by providing ongoing incentive for generating reviews. Access a version of the leaderboard in the Reputation mobile app to view top performers ranked by the number of requests sent through the mobile app.

Metrics

The **Request Metrics** page displays aggregated metrics about the performance of review requests according to **Received**, **Sent**, **Delivered**, **Opened**, **Clicked**, and **Click Through Ratio**.

In addition to the top-line filters, apply secondary filters by **Date Range**, **Mode** (SMS, Email, Kiosk), and **Groupings**.

History

The **History** page provides a log of each request sent, including **Mode**, **Location**, **Template Name**, **Requester**, **To Email**, **To Phone**, **Status**, **Sites** (sent and clicked), and **Sent Date**.

In addition to the top-line filters, apply a secondary filter for **Mode** (SMS, Email, Kiosk).

Templates

The **Templates** page displays a list of templates to use in request solicitations.

With the proper permissions, edit non-system templates, create new templates, and configure follow-up logic that determines secondary emails and SMS messages to automatically send if no response is given within a selected number of days.

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Requesting via Reputation Mobile App

Send an SMS text message to customers for a single location through the Reputation mobile app. Messages are customizable within the platform and are invoked by frontline employees from within the app (iOS | Android).

Log in using platform credentials via magic link or single sign on connection. Choose the location for the request and enter the customer's full name and phone number to request reviews on the go.

Android

iOS

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2 | Requests Checklist (First Time)

Requests Checklist (First Time)

1. Compile a list of the location names and corresponding location codes to decide the locations to send review requests out for.
2. Determine the target date to launch.
   a. Ensure all steps can be created and expectations are properly set.
      - Template development can take one week plus the time for approval.
      - Integration/SFTP set up can take one to two weeks. Refer to the Rep Connect User Guide for more information.
3. Determine which template to use.
   a. Select a direct, one step, or two step template.
   b. Create a subject line.
   c. Make any edits in the wording of the request. Keep it simple to gain the highest chance of response.
      - Poor and Excellent star rating names cannot be changed.

> **Note**: Refer to Requests Options on page 12 for more information on managing request templates.

4. Determine the pathing for the review request.
   - Asking all customers (not just the happy ones) for a review is a best practice—and our data indicates it actually improves reputation more than selectively requesting reviews.

One Step Simple Flow	Two Step Simple Flow
A one step flow presents the respondent with a direct feedback question followed by an invitation to leave a public review. This flow has the highest conversion and click through rates because it requires the fewest clicks from the user. On the other hand, this flow does not capture comments directly in the request.	A two step flow presents the respondent with a direct feedback question, followed by a comments window and an invitation to leave a public review. This flow has lower conversion and click through rates than the one step flow, but it provides direct customer feedback in the event the respondent does not click through to the review site.

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5. Determine the review sites for respondents to leave reviews on.
    - The recommended sites are Google, Facebook, and an industry-specific site (e.g., Healthgrades). Alternatively, the platform can use an algorithm to automatically choose the review sites where reviews are most needed for the location to help with review spread.
6. Determine if a drip campaign is needed.
    - Because some people do not respond to the first email sent, a drip campaign allows for a subsequent reminder email to be sent days after the first review. Drip campaigns result in higher conversion and more people leaving reviews.
    - The email verbiage for the drip campaign is the same as the initial request email verbiage; it does not change as it serves more of a reminder.
7. Determine how to import respondent contact information.
    a. Determine if the customer data will be dropped via SFTP, or if the platform should obtain customer data via your SFTP server.
    b. Rep Connect provides two convenient ways to provide the data to Reputation:
        - Secure File Transfer Protocol (SFTP) Connectors: Provide the data as a CSV or Excel file format to your support and upload it to either our SFTP or your own SFTP servers. Provide the SFTP server information when configuring the integration via connectors.
        - Application Programming Interface (API) Connectors: Allow Rep Connect to fetch the data from your CRM/EHR or any third-party platform via APIs. Provide the API credentials when configuring the integration via connectors.
8. Determine the From Name and From Email for the review request.
    - A from email is required. Many people use noreply@reputation.com or noreply@ tenantname.com.
    - The from name is usually the medical group, practice name, or overall business name. This identifier helps the respondent know who the email is coming from.

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3 | Requests Options

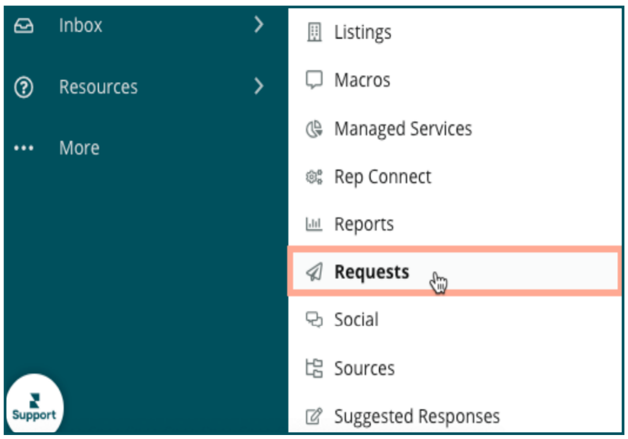
Requests Options

Request options allow account-level options for managing requests.

The **Requests** tab displays options for requesting reviews (or surveys) and managing those requests.

Note: Admin privileges are required to add or modify notifications.

To configure request options:



1. From the top, right corner of the platform, click **Settings**.
2. From the left navigation menu, click **Requests**.
3. Set the preferences for the following options:

Option	Description
Survey Protection Options	Set the threshold (in days) to use when preventing the system from sending multiple requests to the same email address or phone number. Survey protection does not apply to follow-up logic.
Re-Survey Template	Set the template to use when requesting a recipient to retake a survey.
SMS Opt-In	Enable or disable the opt-in requirement for requests. If SMS Opt-In is enabled, request recipients must first reply YES to confirm initial consent to receive text messages. Regardless of this setting, all SMS messages sent from Reputation are followed with a message that says, “Reply STOP to Unsubscribe.” Follow your own corporate messaging guidelines. If enabled, set your preferred opt-in message and opt-in reply text.
Sources	Toggle the checkboxes to turn requests on or off for various sources.

4. Click **Save** for each set of preferences.

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4 | Managing Request Templates

Managing Request Templates

Customize the email sent to customers for survey and review requests.

The **Requests** > **Templates** page displays a list of templates to use in request solicitations. Edit non-system templates, create new templates, and configure follow-up logic that determines secondary emails to automatically send if no response is given within a selected number of days.

Sort the available templates by the following top-line filters: Level, Type, or Parent.

Template Level

System templates are the default templates provided to all accounts. System templates cannot be edited, but some system templates can be saved as a copy for customization and used within requests via quick request, bulk upload, or custom integration.

New templates can be assigned at the tenant level (all locations) or per location.

Note: System templates for “Star” and “Smiley” provide an out-of-the-box simple survey flow. Learn more about simple surveys in the Surveys User Guide.

Template Type

Templates can be designed for one of the following modes: Email, Kiosk, or SMS. The type chosen determines the properties and design of the template, which is handled differently depending on the request method:

Quick Request	Bulk Requests
Only templates that correspond to the request method (Email or SMS) are available to choose. See Follow-Up Logic on page 16 for more information.	The system only sends requests if the template corresponds with an appropriate contact method for the recipient (email address or phone number). See Bulk Requests on page 25 for more information.

Template Status

Inactivating a template temporarily removes it from request template dropdowns. The template can then no longer be used in bulk requests and request integrations. System templates cannot be inactivated.

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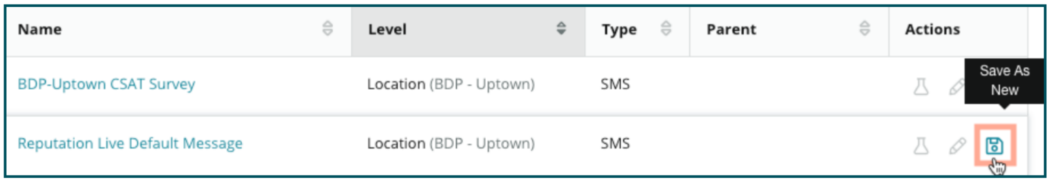
Template Properties

Template properties define how the template functions when used in a request. Preview a template by clicking the template name.

To create a new template,

1. From **Requests**, click **Templates**.
2. Locate an existing template type from which to copy.
3. Next to the template options, click **Save as New**.



Name	Level	Type	Parent	Actions
BDP-Uptown CSAT Survey	Location (BDP - Uptown)	SMS		Save As New
Reputation Live Default Message	Location (BDP - Uptown)	SMS		

4. In the template editor, modify the template properties.
   a. Use the **Preview** option to see how the template design will appear with the selected properties.
   b. Use the **HTML** tab (email/kiosk type) or **Text** tab (SMS type) to modify the message body or use the **Edit** tab to modify the look and feel using a WYSIWYG designer.
      - **Type**: Type of template (email, SMS, or kiosk).
      - **Name**: Name of the template.
      - **Status**: Set to active for new templates.
      - **Level**: Level of template (tenant (all locations) or selected location).
      - **From Name**: The From display name used when the email is delivered. Variables {{location-from-name}} automatically pull in the selected location's name.
      - **From Email**: The From email address used when the email is delivered. Variables {{location-from-email}} automatically pull in the selected location's name. This is the address used if the recipient replies to the email.
      - **Subject**: The subject line of the email.
      - **Review Sites**: Reputation.com inserted dynamically chooses two of the selected review sites (with exclusions) to include in the request based on a custom algorithm. The algorithm ensures the requests are distributed across review sites that have the highest impact on Reputation Score. (Refer to the [Reputation Score X User Guide] for information on the different components of Reputation Score).
         - If manually inserting review sites, select the review site(s) to include. No more than two options is recommended.
5. Configure the follow-up logic (optional). Configure logic for the current template on the edit screen or from the list of templates.
6. Click **Save**.

Follow-Up Logic

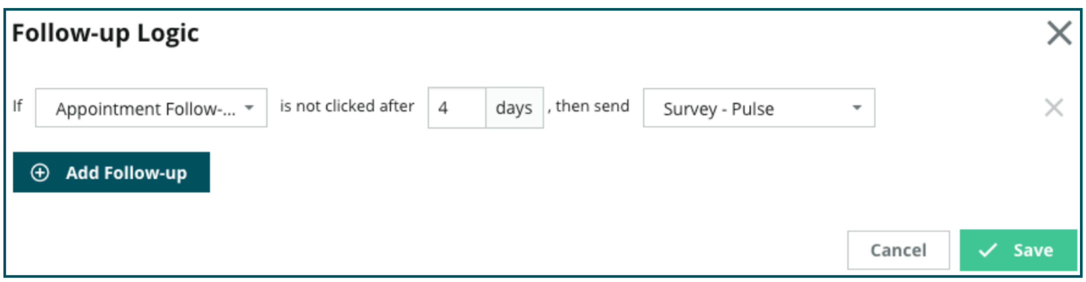
Asking for feedback two additional times after the initial request with several days between has been proven to improve success rates by 30-60%. In fact, we generally find that the second follow-up has a higher response rate than the first follow-up review request email. Suggested logic includes:

- Day 1: Send initial request.
- Day 4: If no review site links have been clicked, send a second request.
- Day 9: If no opens or review site links have been clicked, send a third request.

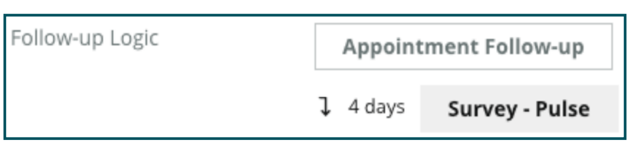
Before configuring follow-up logic, ensure the desired template(s) for the follow-up process have been created.

To configure follow-up logic:

1. At the top of the list of templates (or within the edit screen of a template), click **Configure Follow-up**.
2. Set the first condition:
    - If [template name] is not clicked after [days], then send [template name].



3. Click **Add Follow-up** to add another rule.
4. Click **Save**.
    - Upon refreshing the list of templates, any templates defined in a follow-up process will list the parent template in the Parent column.
        - The follow-up logic is listed within the properties of the parent template.:



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5 | Quick Requests

Quick Requests

Send a review request email or SMS text message to one or more customers for a particular location.

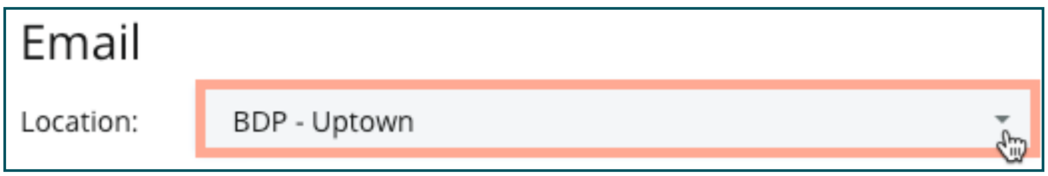
Email Requests

Email requests are delivered to the specified email address(es) in the request. Email messages are customizable and invoked from within the platform.

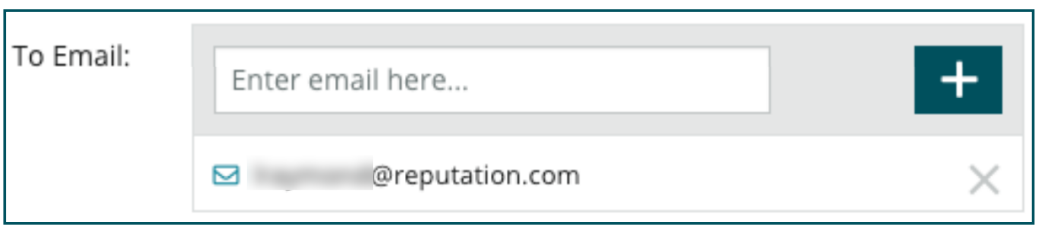
To request a review via email:

1. From the **Requests** tab, click **Quick Request**.
2. On the **Email** tab, modify the following settings:

- **Location**: Select a location to originate the request(s) from.

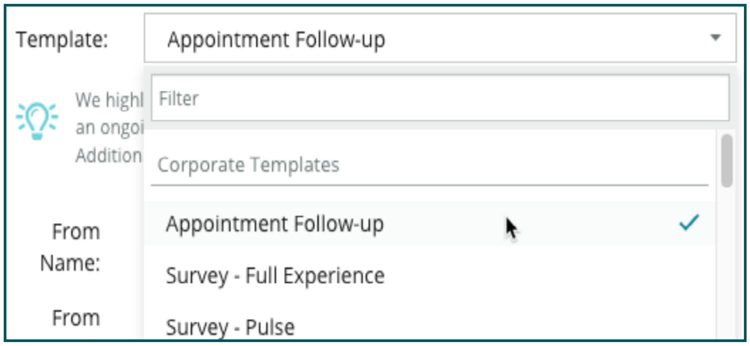


- **To Email**: Enter/paste one or more email addresses. Separate multiple addresses with a comma. Click the plus icon to add them to the list.



Note: Although you can send to more than one email address at a time, consider limiting the batch to 10 addresses at a time. For larger batches, use the Bulk Uploader. See [Bulk Requests on page 25] for more information.

- **Template**: The subject and body of the message. Email templates are categorized as Corporate (not optimized) or Optimized (passed optimization test). Preview the selected template in the preview window. Some templates may have follow-up logic assigned.

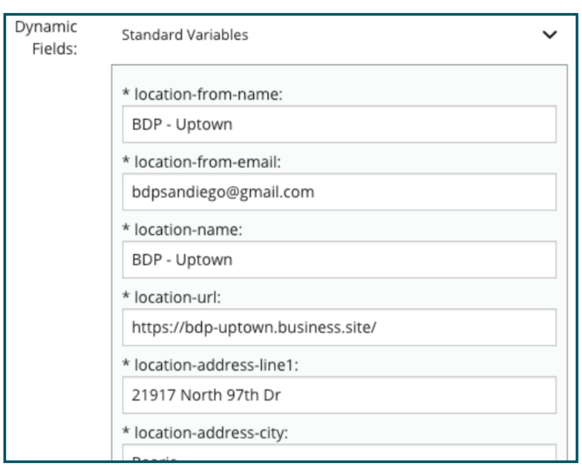


Note: We highly recommend using optimized templates. They are refined on an ongoing basis using split (A/B) testing to ensure maximum conversion rates. Additionally, they are optimized for desktop and mobile.

- **From Name**: The From display name used when the email is delivered. Variables {{location-from-name}} automatically pull in the selected location's name to avoid the need to enter this information manually.

Note: To preview or edit the data used, click to expand the Dynamic Fields.

- **From Email**: The From email address used when the email is delivered. Variables {{location-from-email}} automatically pull in the selected location's name to avoid the need to enter this information manually. This is the address used if the recipient replies to the email.
- **Subject**: The subject line of the email.
- **Dynamic Fields**: Shows the values for the selected variables. Edits made to standard variable values apply to this request only.
    i. To edit variable values at the location level, Admin privileges are required.
    ii. From the top, right corner of the platform, click **Settings**.
    iii. Click **Locations** > choose a location > **Messaging** > **Edit**.



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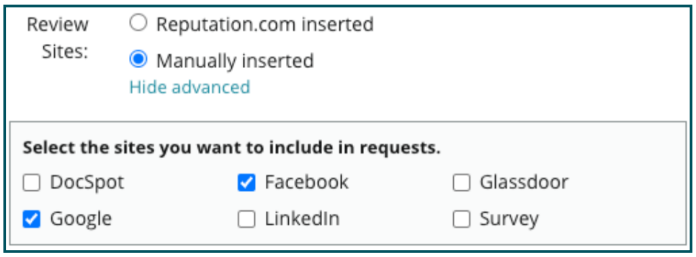
- **Review Sites**: If the selected template includes links to request sites, **Reputation.com inserted** dynamically chooses two of the selected review sites to include in the request based on a custom algorithm. The algorithm ensures the requests are distributed across review sites that have the highest impact on Reputation Score. If **Manually inserted** is selected, choose the review site(s) to include. Sites selected in the Advanced window are included in the message. We recommend choosing no more than two options.
- **Show Advanced**: Indicates the review sites to pull into the template, based on the Review Sites settings above.



3. Click **Test** to send a test request email.
   - Actions taken on test emails are not recorded and do not impact metrics.
4. Click **Send Request** to deploy live request emails.
   - A message indicates the status of the request. If any requests failed due to address formatting errors or over-survey protection, the details of the failure display in a message.
5. View a log of the requests from the **Requests** > **History** tab.
   - For more information, see History on page 44.

SMS Requests

SMS requests are delivered to the specified phone number in the request. Only one phone number can be entered for each request. SMS messages are customizable and invoked from within the platform.

> **Note**: If SMS Opt-In is enabled, the recipient must first reply YES to confirm initial consent to receive text messages from the business.
>
> Regardless of this setting, all SMS messages sent from Reputation are followed with a message that says, “Reply STOP to Unsubscribe.”

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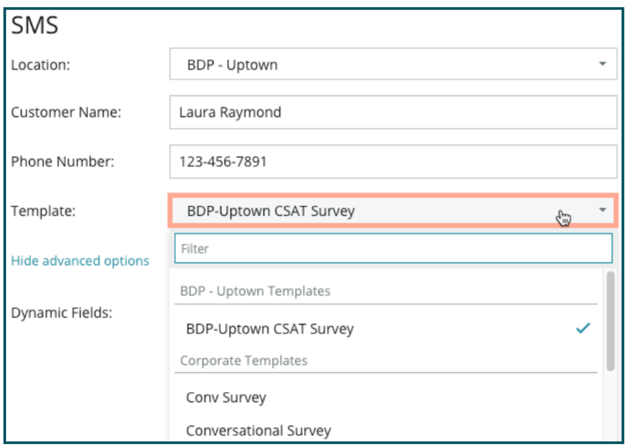
To request a review via SMS:

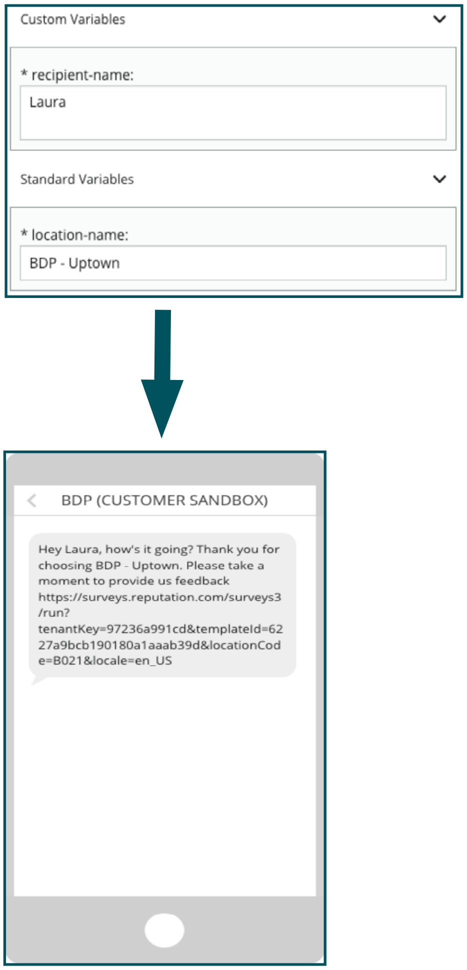
1. From the **Requests** tab, click **Quick Request**.
2. Click the **SMS** tab and modify the following settings:

- **Location**: Select one location to make the request(s) from.
- **Customer Name**: Enter the customer's first and last name. If the template includes a variable for recipient name, and no customer name is entered, the variable is replaced with a blank space.
- **Phone Number**: Enter/paste one phone number. Dashes are not required but are allowed.
- **Template**: The body of the message. SMS templates are categorized as Corporate (not optimized) or Optimized (passed optimization test). Preview the selected template in the preview window. Some templates may have follow-up logic assigned.

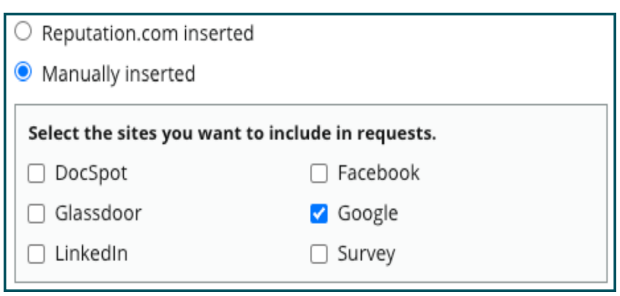


- **Show advanced options**: Click to expand additional options.
  - **Dynamic Fields**: Shows the values for the selected variables. Edits made to standard variable values apply to this request only.
    i. To edit variable values at the location level, Admin privileges are needed.
    ii. From the top, right corner of the platform, click **Settings**.

iii. Click **Locations** > choose a location > **Messaging** > **Edit**.



- **Review Sites**: If the selected template includes links to request sites, **Reputation.com inserted** dynamically chooses two of the selected review sites to include in the request based on a custom algorithm. The algorithm ensures the requests are distributed across review sites that have the highest impact on Reputation Score. If **Manually inserted** is selected, choose the review site(s) to include. Sites selected in the Advanced window will be included in the message. We recommend choosing no more than two options.



3. Click **Test** to send a test request message.

- Actions taken on test messages are not recorded and do not impact metrics.

4. Click **Send SMS** to deploy live request messages.
    - A message indicates the status of the request. If any requests failed due to phone number errors or over-survey protection, the details of the failure display in a message.
5. View a log of the requests from the **Requests** > **History** tab.
    - For more information, see History on page 44.

Conversational Survey

Conversational Surveys are sent via SMS requests and are delivered to the specified phone number in the request. Only one phone number can be entered for each request.

To send a conversational survey via SMS:

1. From the **Requests** tab, click **Quick Request**.
2. Click the **Conversational Survey** tab, and modify the same settings as SMS Requests above PLUS:
    - **Survey Template**: Refer to the Surveys User Guide for more information on conversational surveys.
3. Click **Test** to send a test request message.
    - Actions taken on test messages are not recorded and do not impact metrics.
4. Click **Send SMS** to deploy live request messages.

    - A message indicates the status of the request. If any requests failed due to phone number errors or over-survey protection, the details of the failure display in a message.
5. View a log of the requests from the **Requests** > **History** tab.
    - For more information, History on page 44.

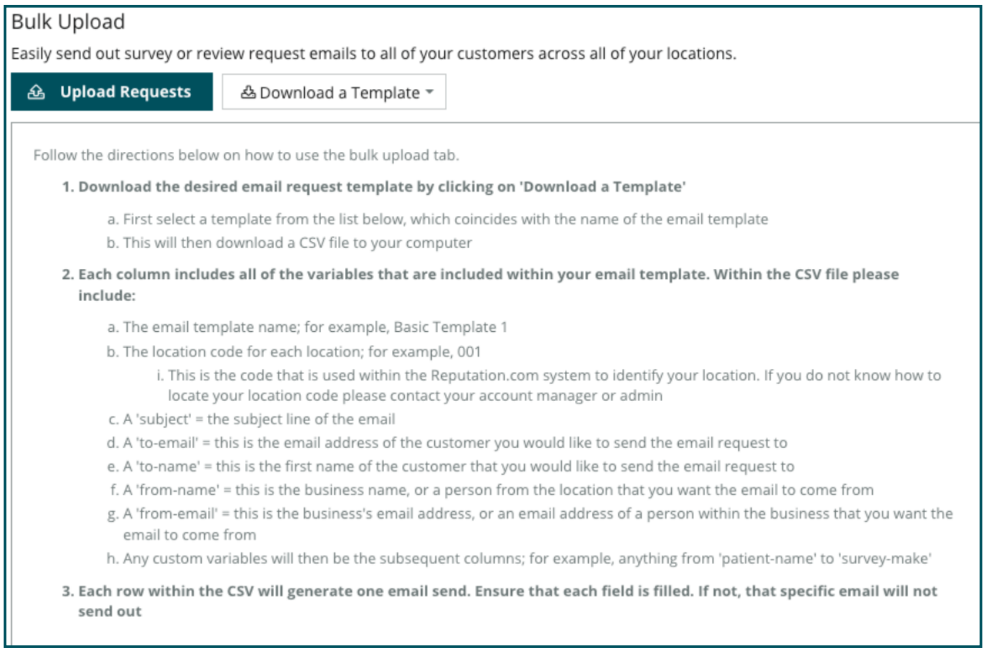
6 | Bulk Requests

Bulk Requests

Send review requests in batches to multiple customers at once.

The **Bulk Upload** page provides the ability to send a review request email or SMS text message to several customers at one or more locations at once. Messages are based on predefined templates that are customizable within the platform.

Bulk requests are delivered according to the specified email address or phone number, location, and template in each row of the CSV file.



Note: If SMS Opt-In is enabled, the recipient must first reply YES to confirm initial consent to receive text messages from the business.

Bulk requests may be subject to United States telecommunication laws; follow your own corporate messaging guidelines.

To request an Email or SMS review via bulk upload:

1. From the **Requests** tab, click **Bulk Upload**.
2. On the **Bulk Upload** page, click the **Download a Template** dropdown, and choose a template in the list to base the request on.
    - The selection determines the columns used in the upload spreadsheet. For example, if choosing an email template, some of the columns required for SMS will not be included in the upload template.
    - The bulk upload template downloads to your computer's default download location.

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3. Open the downloaded request template. Copy and paste the following information into the cells for each request.

	A	B	C	D	E	F	G	H	I
1	BDP (CUSTOMER SANDBOX)-request-reviews (1)								
2	**template**	location-code	subject	to-email	to-phone	to-name	from-email	from-name	recipient-name

- **template**: The name of the template to use in the request. Ensure the name entered here is a perfect match to the template's name in the platform; an extra space at the end of the name will cause the upload to fail. Some templates may have follow-up logic assigned.
- **location-code**: The location code for the location the request is sent on behalf of. Admin permissions are required to find a location's code.

    a. Click **Settings** > **Locations**.

    - If a code starts with a zero, enter an apostrophe before the code in the CSV file (example: '0104); otherwise, the system removes the leading zero.

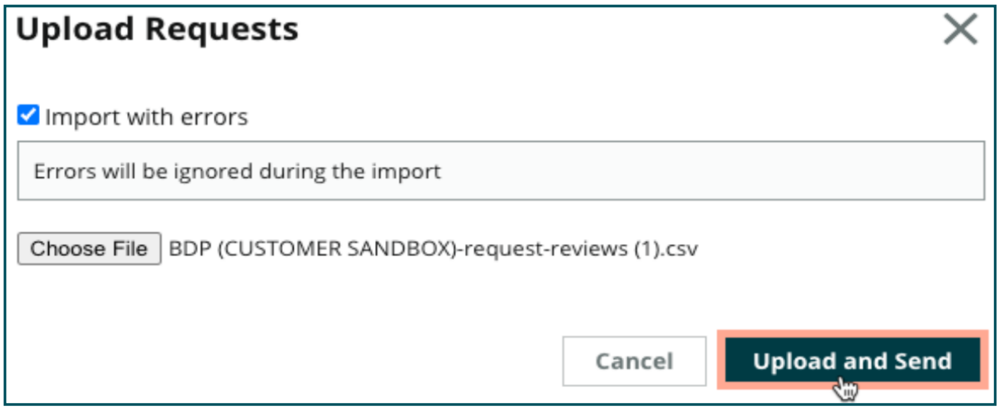
- **subject**: Applies to email message types only. The subject line of the email. If the template already has a subject line defined, skip this column if desired.
- **to-email**: Applies to email AND SMS message types. The email address of the recipient. Double-check the formatting to ensure address accuracy.
- **to-phone**: Applies to SMS message types only. The phone number of the recipient (dashes are allowed but not required). Double-check the formatting to ensure accuracy.
- **to-name**: Enter the customer's first and last name (for Email). If the template includes a variable for recipient name, and no customer name is entered, the variable is replaced with a blank space.
- **from-email**: The From email address used when the email is delivered. Template variables {{location-from-email}} automatically pull in the selected location's name to avoid having to enter this information manually. This is the address used if the recipient replies to the email.
- **from-name**: The From display name used when the email is delivered. Template variables {{location-from-name}} automatically pull in the selected location's name.
- **recipient-name**: Enter the customer's first and last name (for SMS). If the template includes a variable for recipient name, and no customer name is entered, the variable is replaced with a blank space.

4. Save the file in a CSV format (e.g., [Account Name]-requestreviews_Sep2020.csv). Then from the **Bulk Upload** screen, click **Upload Requests**.
5. In the **Upload Requests** window, click **Choose File** to locate the file.

6. Select the **Import with errors** check box to proceed with the request even if some rows have errors.

    - All rows that do not have errors will process. Re-upload the request for only the rows that did not upload in a second request after fixing the errors. If the Import has the errors check box cleared, if any rows have errors, none of the requests will be processed until all errors are fixed. Regardless of the option chosen, over-survey protection is in place to ensure duplicate requests are not sent within a set number of days.

7. Click **Upload and Send**.



    - A message indicates the status of the request. If any requests fail due to address formatting errors, over-survey protection, or a template that does not apply to the selected “to” input, the details of the failure display in a message.

8. View a log of the requests from the **Requests** > **History** tab.

    - For more information, see History on page 44.

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7 | Requests via Mobile App

Requests via Mobile App

Admin Instructions: Setting Up Frontline Users

The mobile request option through the Reputation mobile app (iOS | Android) allows frontline employees to send a review request SMS message to a customer on the spot. The app includes gamification to incentivize staff to continually request reviews for maximum search rankings.

Considerations for implementing the app for your organization:

- If SMS Opt-In is enabled, the recipient must first reply YES to confirm initial consent to receive text messages from your business. Because one-off requests sent person-to-person do not infringe upon United States telecommunication laws, we typically recommend disabling this setting when sending requests from the mobile app for maximum response rate; however, follow your own corporate messaging guidelines. Regardless of this setting, all SMS messages sent from Reputation are followed with a message that says, “Reply STOP to Unsubscribe.”
- Each frontline employee who request reviews from the app must have a mobile device with the Reputation mobile app installed (iOS | Android).
- Each requester must also have a user profile created within your platform account (**Admin** > **Users**). Alternatively, use a magic link to log in so a welcome email or password set up is not required. However, this option requires users to be able to check their company email on their mobile devices. For more information, see User Instructions: Requesting Reviews on page 30.
- The app contains a leaderboard for frontline employees to see who has requested the most reviews at their location. Additionally, use the leaderboard within the web application to see request leaders across multiple locations.

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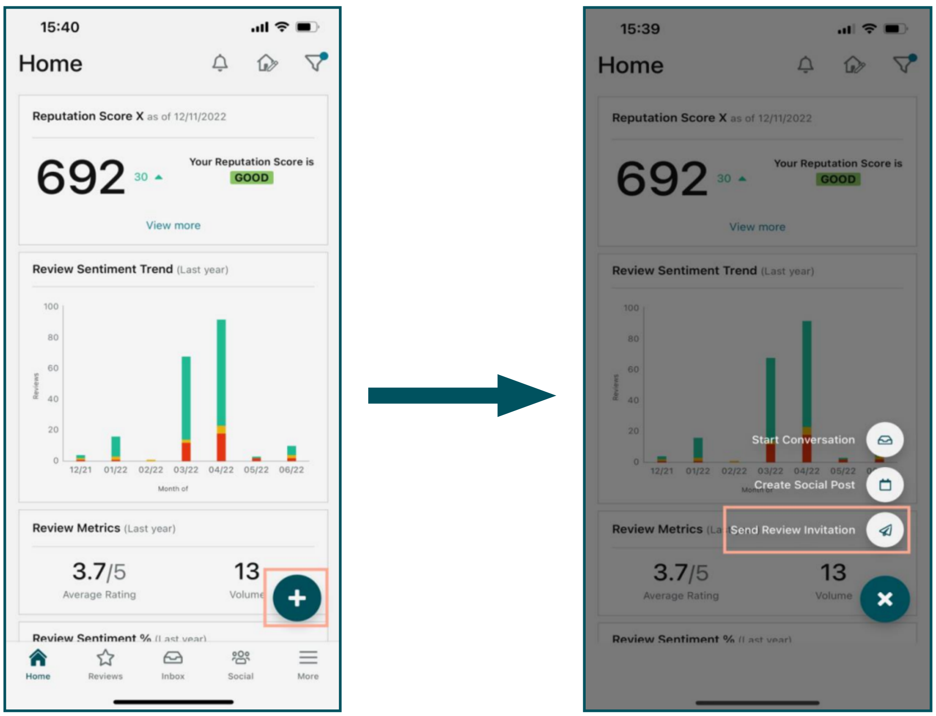
User Instructions: Requesting Reviews

Review requesting is an important step in collecting feedback from the silent majority. The Reputation mobile app provides personal invitations to leave a review through an SMS text message.

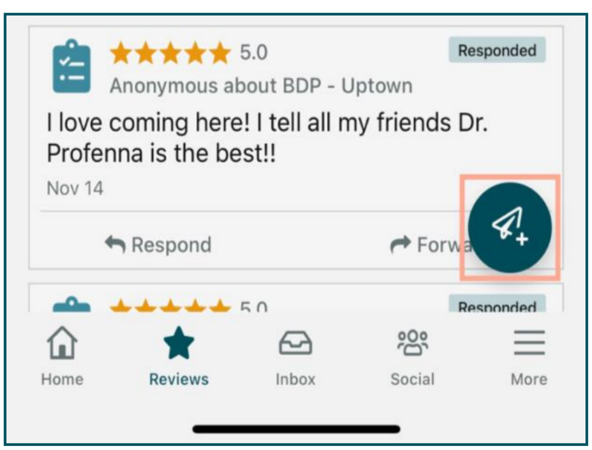
To send a mobile request,

1. Download the Reputation mobile app.
2. Open the Reputation mobile app and log in using your email and password, magic link, or single sign-on connection.
3. From the home page, tap **Reviews**.

> **Note**: Request reviews by tapping the plus icon at the bottom of the screen. Then tap **Send Review Invitation**.



4. Tap the icon in the bottom left corner to request reviews.



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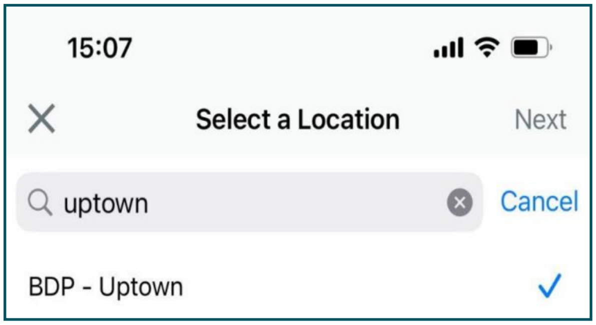
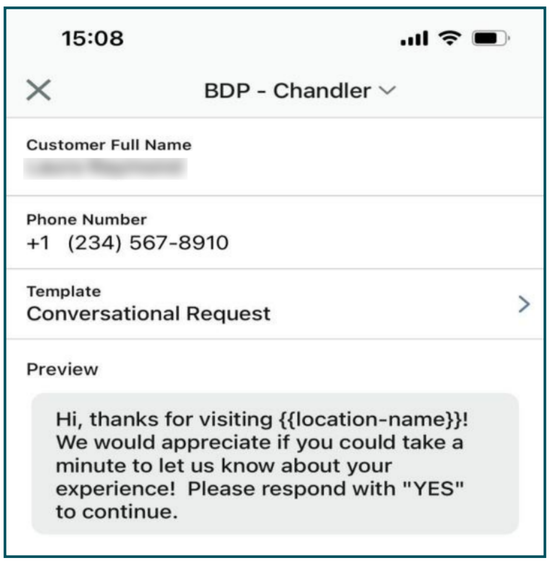
5. Choose the location to send the request from.



Note: If you only manage one location, that location will automatically be selected.

6. Enter the customer's full name and phone number.
7. Select an SMS template.



Note: Templates are not editable on the mobile app.

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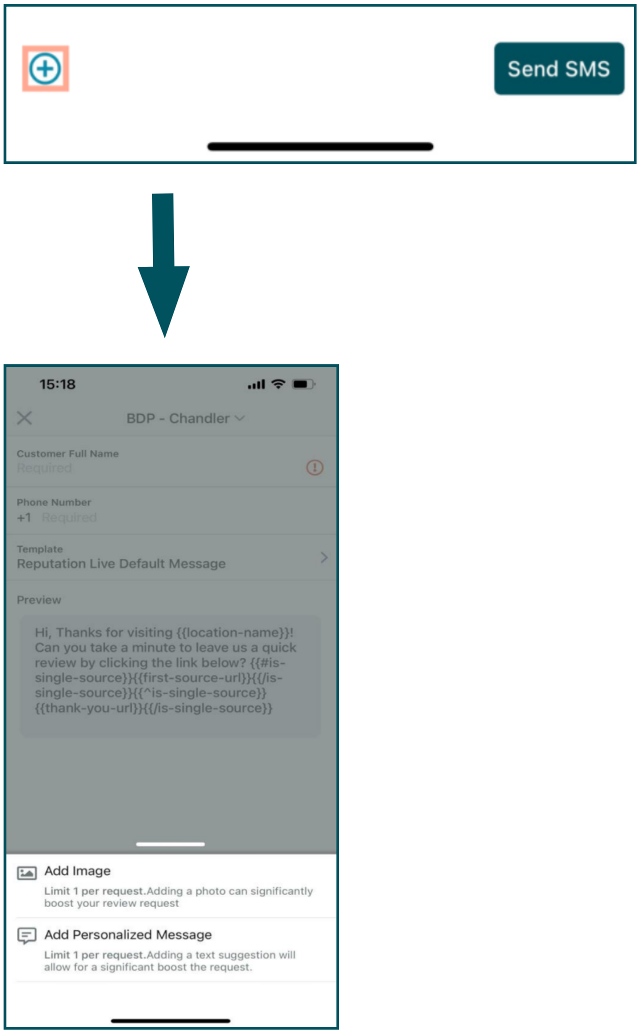
8. Tap the plus (+) icon at the bottom of the screen to customize the request with an image or a personalized message. Customizations are optional.

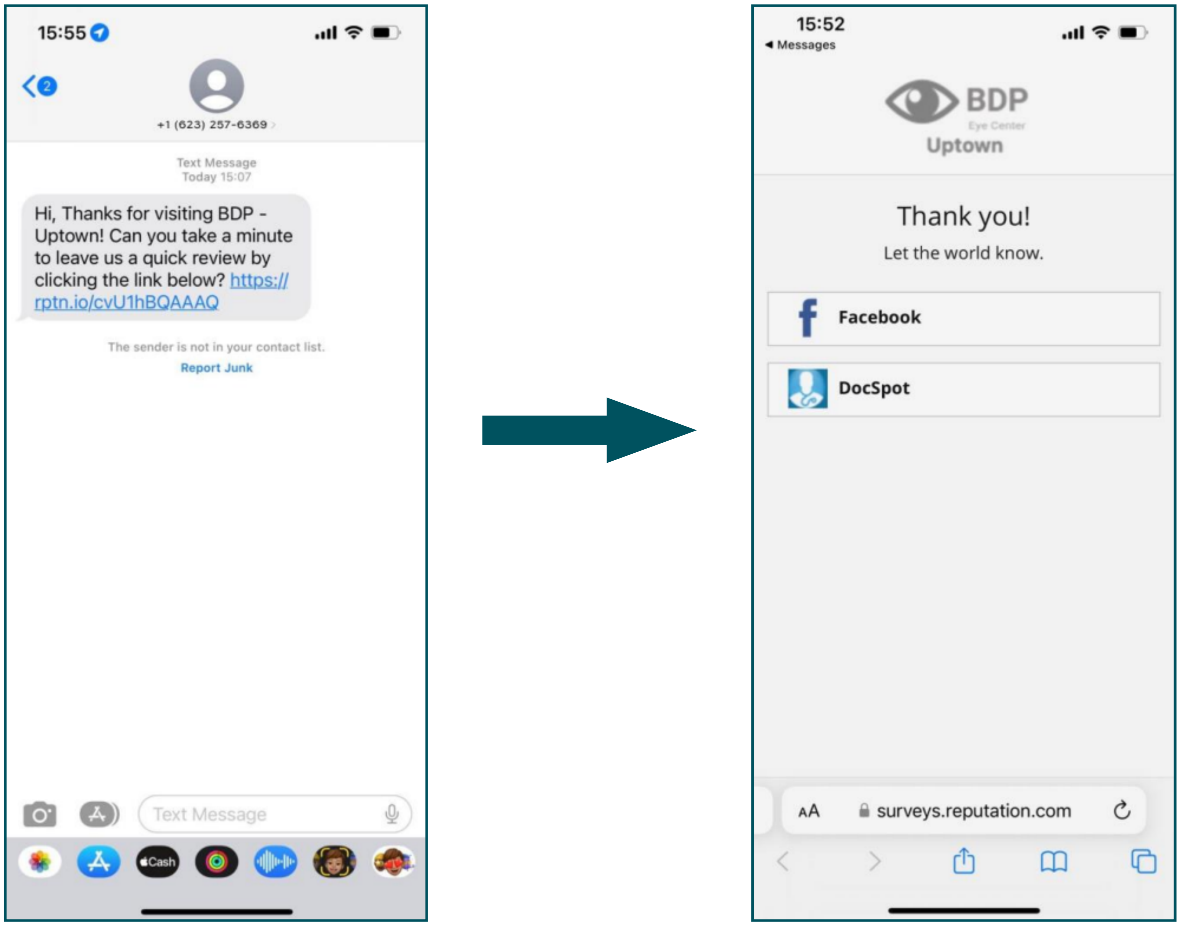


9. Tap **Send SMS**.

10. Tap **OK** on the message confirming the request was sent.

Customer Request Experience

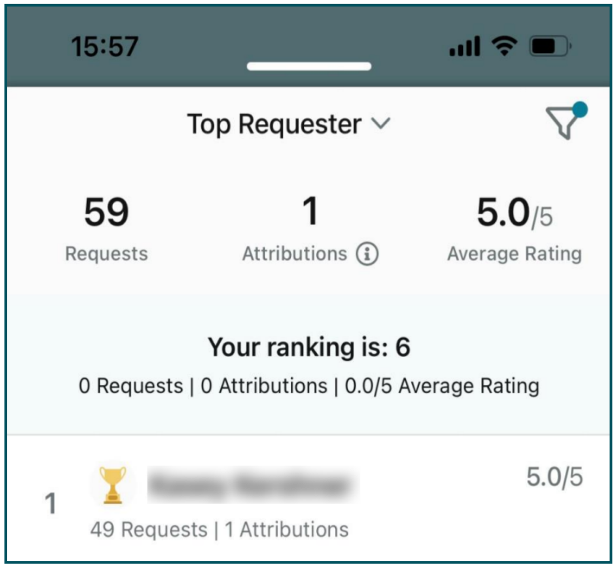
The recipient receives an SMS message and clicks the link to open review site options for the location they visited. If SMS Opt-In is enabled, the recipient must first reply YES to confirm initial consent to receive text messages from the business.



> **Note**: Regardless of this setting, all SMS messages sent from Reputation are followed with a message that says, “Reply STOP to Unsubscribe.”

Leaderboard on Mobile App

The more review requests you send, the higher your ranking on the app Leaderboard. The Leaderboard displays who has sent the most review requests at the location.



8 | Leaderboard

Leaderboard

A leaderboard is a great way to engage a team by providing ongoing incentives for generating reviews, such as Top Requester of the Month.

The Leaderboard page ranks locations (1 = highest) to determine top performers in the number of requests sent. Within the web application, view statistics for requests sent, resulting clicks, number of total reviews and surveys, attributed reviews and surveys, and average star rating.

Note: Frontline employees using the mobile app can also access a version of the leaderboard to view top performers within their location.

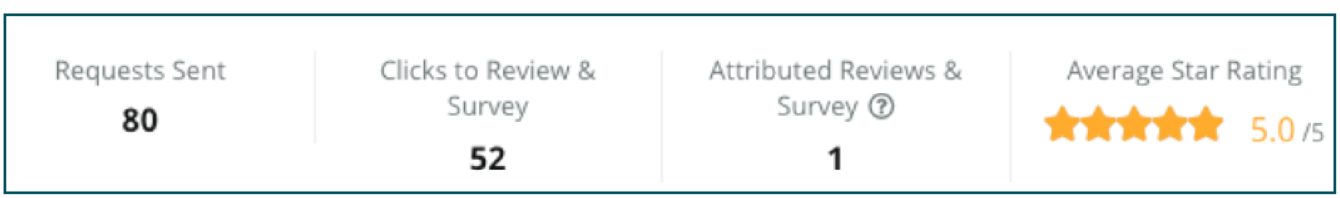
Filters

The top-line filters affect the data shown on the tab. Secondary filters are available to limit the data by request mode: All, SMS, Email, and Kiosk. Group By filters sort the data by Location, Requester, City, State, or custom filters.

Note: Grouping by Requester displays an additional option to filter by role.

Summary Area

Displays the total results for the selected filter(s).



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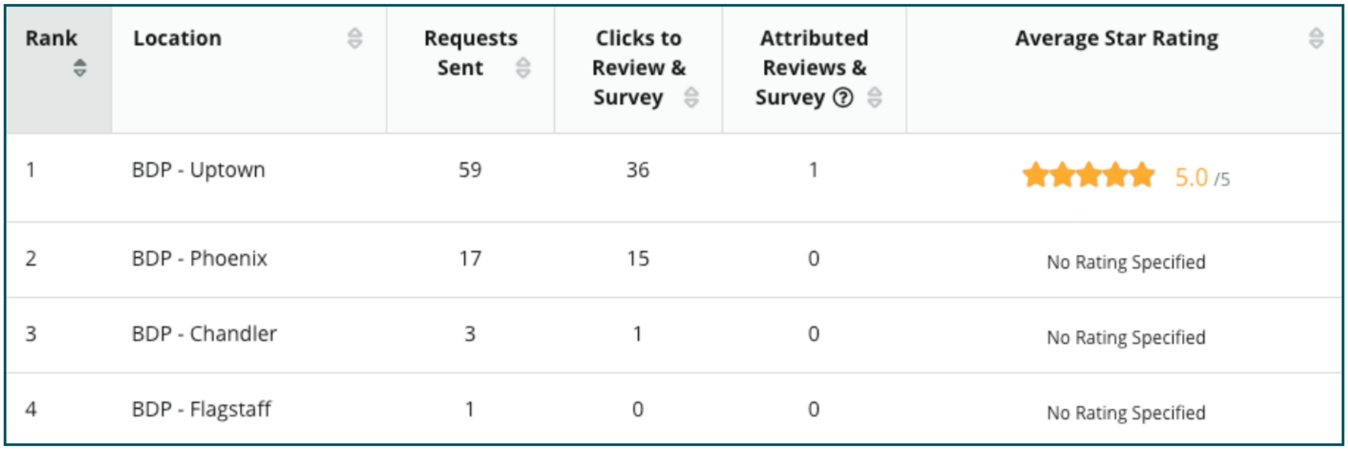
Detail Area

Displays the detailed results for the selected filters. Click a column name to sort.



Rank	Location	Requests Sent	Clicks to Review & Survey	Attributed Reviews & Survey	Average Star Rating
1	BDP - Uptown	59	36	1	5.0 /5
2	BDP - Phoenix	17	15	0	No Rating Specified
3	BDP - Chandler	3	1	0	No Rating Specified
4	BDP - Flagstaff	1	0	0	No Rating Specified

Column	Description
Rank	The requester or location with the most review requests sent.
Location/Requester	The location or user associated with the ranking.
Requests Sent	The total number of requests sent from the selected location or user (requester).
Clicks to Review & Survey	The total number of clicks generated from the request. The click count correlates to any links within the email or any review site links in SMS messages. The number of clicks does not correlate directly to a review posting beyond the initial message if the user abandons the request process, but it is a good indicator of interest. For example, this location sent six requests. Of those requests, four clicks were generated (not necessarily unique).

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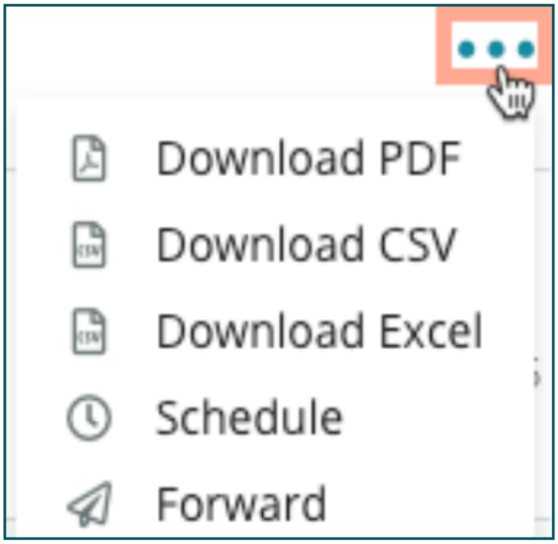
Leaderboard Options

To access additional options, click the ellipsis in the top, right corner of the Leaderboard summary area.



Options include:

- Download PDF
- Download CSV
- Schedule
- Forward

Filters that are currently applied to the data set persist to all request options.

> **Note**: Operations that take time to process large amounts of data may invoke a pop-up window that allows you 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).

Column	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 (Requests Sent – By Location), time period selected, and locations selected.
Download CSV	Export the current data set into a CSV 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.

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).

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9 | Metrics

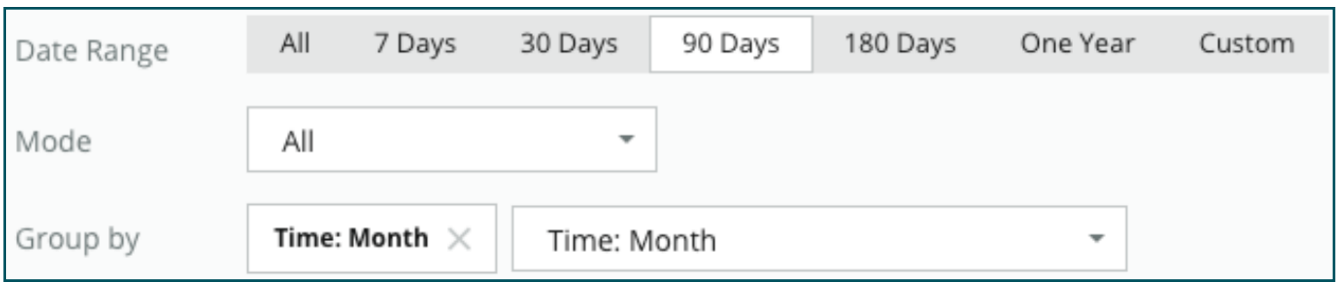
Metrics

Identify how successful your request efforts are in terms of review conversion and other factors.

The **Request Metrics** page displays aggregated metrics about the performance of review requests, such as which template is most successful. Download the report data to CSV for further analysis.

Filters

In addition to the top-line filters, the following options are available to filter and group the data in the report:



Filter	Description
Date Range	The time period for the report data: All, 7 days, 30 days, 90 days, 180 days, one year, or custom.
Mode	The request mode: SMS, Email, and/or Kiosk.
Group by	The groupings to include in the report: Custom filter(s), Location, Template Name, Mode, Requester, Time. Each filter chosen appears as its own column in the report.
Date Range	The time period for the report data: All, 7 days, 30 days, 90 days, 180 days, one year, or custom.

Note: If the filters are applied, click **Generate Report** to update the Summary/ Detail area.

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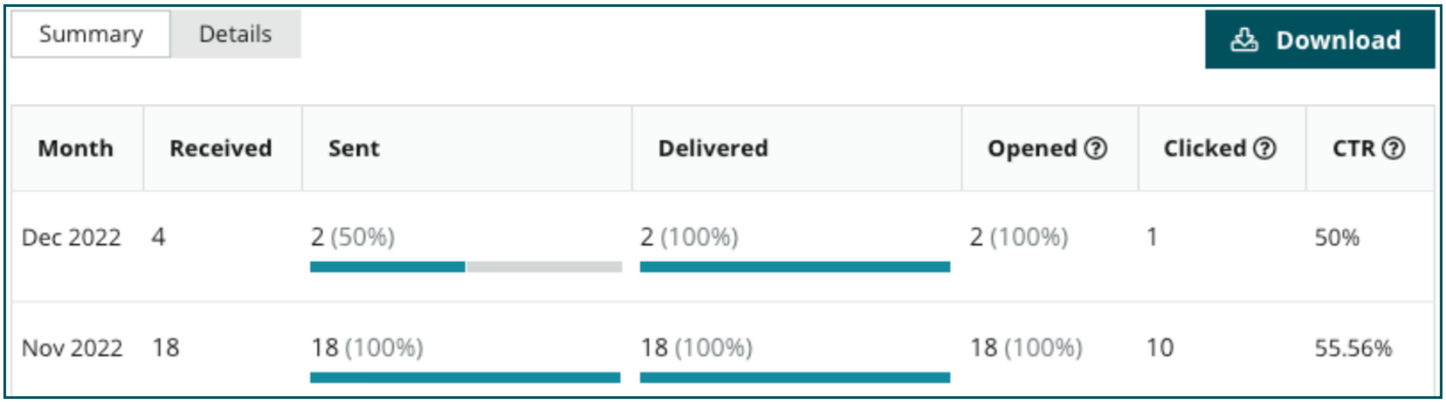
Summary/Detail Chart

This chart displays the results of the report. The **Details** option includes additional data for Sent, Delivered, Opened, and Clicked columns.



Month	Received	Sent	Delivered	Opened	Clicked	CTR
Dec 2022	4	2 (50%)	2 (100%)	2 (100%)	1	50%
Nov 2022	18	18 (100%)	18 (100%)	18 (100%)	10	55.56%

Column	Description
[Group By]	The group by filter(s) chosen.
Received	The number of requests invoked on behalf of the account (i.e., the number of requests “received” by the Reputation Generation Engine).
Sent	The number of requests sent to the designated recipients (i.e., the number of requests “sent” from the Reputation Generation Engine). The **Details** option also shows the number of requests not sent. The percentage indicates the ratio of received to sent. A request might not be sent if the request includes an address/phone number with failed validation or that has already been solicited within the account’s survey protection threshold.
Delivered	**SMS**: The number of SMS requests successfully delivered to the phone numbers provided. **Email**: The number of email requests successfully delivered to the email addresses provided. The **Details** option also shows the number of requests not delivered. The percentage indicates the ratio of sent to delivered.
Opened	**SMS**: The number of SMS requests delivered. There is no way to track if an SMS was opened, so the assumption is that if the message was delivered, it was also opened. **Email**: The unique number of email requests that were opened by the recipient. The **Details** option also shows the total number of opens (not unique). The percentage indicates the ratio of delivered to opened.

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Column	Description
Clicked	**SMS**: The number of unique clicks on the tracked link in SMS requests. This is the link embedded in the SMS message, not the survey or review site options page that opens next. **Email**: The number of unique clicks on a tracked link in email requests. This can be a survey link or third party review site links, whichever is embedded in the email. The **Details** option also shows the total number of clicks (not unique). The total click count correlates to: 1. Links within the email/SMS message. 2. Review site links in the email. 3. Links on the review site options page that opens after the initial link in the SMS is clicked. The number of clicks does not correlate directly to a review posting beyond the initial message if the user abandons the request process, but it is a good indicator of interest.
CTR	**SMS**: The ratio of unique clicks to delivered. **Email**: The ratio of unique clicks to unique opened.

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10 | History

History

The History page provides a log of each request sent from the platform and mobile app.

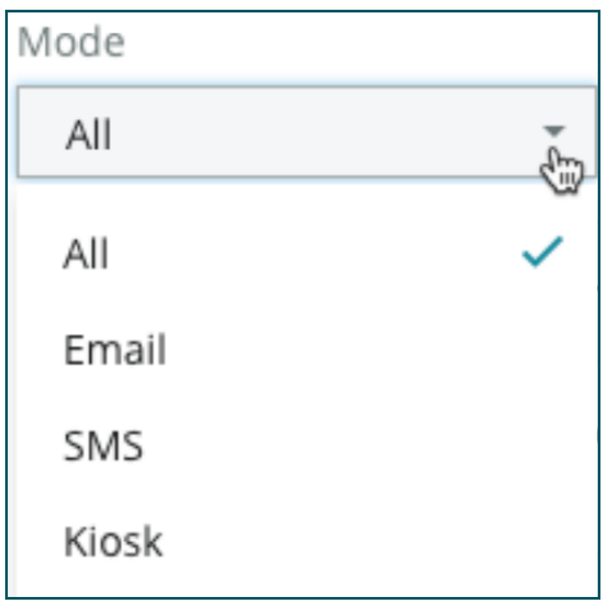
Requests can come from multiple sources:

- Reputation Mobile App
- Quick Request
- Bulk Upload
- Surveys
- Integrations

The **History** tab shows all requests sent from all sources.

Filters

In addition to the top-line filters, the following option is available to filter the data:

Column	Description
Mode	The request mode: All, SMS, Email, or Kiosk. 

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Detail Chart

The detail chart displays the results of the selections.

Mode	Location	Template Name	Requester	To Email	To Phone	Status	Sites	Sent Date
SMS	BDP - Uptown	Conversational Survey	[illegible]		+1219*****	Clicked		Dec 5, 2022

Field	Description
Mode	The request mode selected in the filter.
Location	The location included in the request.
Template Name	The template used in the request.
Requester	The user associated with the request.
To Email	The email address the request was sent to. This column is blank if the request was sent via SMS through the mobile app or a quick request.
To Phone	The phone number to which the request was sent. This column is blank if the request was sent via email.
Status	The status of the request: Delivered or Clicked.
Sites	The sites (or survey) clicked in the request. Available sites are determined by the template options. Sites not clicked appear dimmed.
Sent Date	The date the request was sent.

History Options

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

Options include:

- Download PDF
- Download CSV
- Schedule
- Forward

Filters that are currently applied to the data set will persist to all request options.

> **Note**: Operations that take time to process large amounts of data may invoke a pop-up window that allows you 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 (Requests History Log), time period selected, and locations selected.
Download CSV	Export the current data set into a CSV 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.

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).

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11 | Best Practices for Requesting Reviews

Best Practices for Requesting Reviews

Response rates for SMS requests are 4–15x better than email requests.

Email requests use fully customizable templates and are more visually appealing than SMS; however, email requests may introduce a layer of friction if the recipient reads the request from a computer rather than on a smartphone. In other words, if the request template includes links to review sites, the user may be required to perform an additional step of logging into those review sites if not already authorized within the current browser session (e.g., Google, Facebook).

SMS delivery ensures the customer is already on his or her mobile device, which typically results in a more seamless experience because most mobile users are already logged into those apps and can access the review form with one touch.

General Best Practices

Mobile App Requests

For best results in review attribution, follow these best practices:

- **Deliver a great experience**: People writing reviews are generally very dissatisfied or very satisfied. If the service is average, people are unlikely to write reviews. Earn a positive review.
- **Tell customers what to expect**: Let customers know to expect a request to review their experience, and verbally invite them to click on the link and write a review. It is important to be clear as to what the customers should do.
- **Show gratitude and make it personal**: Thank customers preemptively for taking the time to click on the link and write a review. Explain that you are striving to deliver the best service and that you feel proud and motivated when you hear positive feedback from customers.
- **Be particular about timing**: If the request is opened using the location WiFi, it is likely that reviews will be removed as “fake” by Google, Facebook, and other review sites. It is best to wait for customers to leave the premises before sending the requests. However, do not wait too long before sending the request (no more than six hours).
- **Play by the rules**: Never offer monetary incentives or gifts to motivate the recipients to write reviews.

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Bulk Requests

- Review sites want to see steady, organic review growth over time. Rather than send an email or SMS message to an entire customer-base at once, divide the bulk requests to send no more than 10% per location each week to avoid a deluge of reviews in a single month.
- To maximize deliverability against spam filters, ensure the From email includes a real name from the business domain “sarah.jones@yourcompany.com,” rather than “noreply@…” or “…@gmail.com.”
- Ensure the “To” address is entered accurately to streamline the request process.

Compliance Best Practices

Requests include precautions to ensure compliance with laws and industry best practices, such as over-survey protection, SMS opt-in, and unsubscribe options. These laws include:

- CAN-SPAM Act
- General Data Protection Regulation (GDPR) ePrivacy
- HIPAA Privacy
- Telephone Consumer Protection Act (TCPA)

If SMS Opt-In is enabled for the account, the recipient must first reply YES to confirm initial consent to receive text messages from the business.

- **Quick Requests**: Because one-off requests sent person-to-person do not infringe upon United States telecommunication laws, we typically recommend disabling this setting when sending quick requests for maximum response rate; however, follow your own corporate messaging guidelines.
- **Bulk Requests**: Bulk requests may be subject to United States telecommunication laws; follow your own corporate messaging guidelines.

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12 | Premium Paid Services

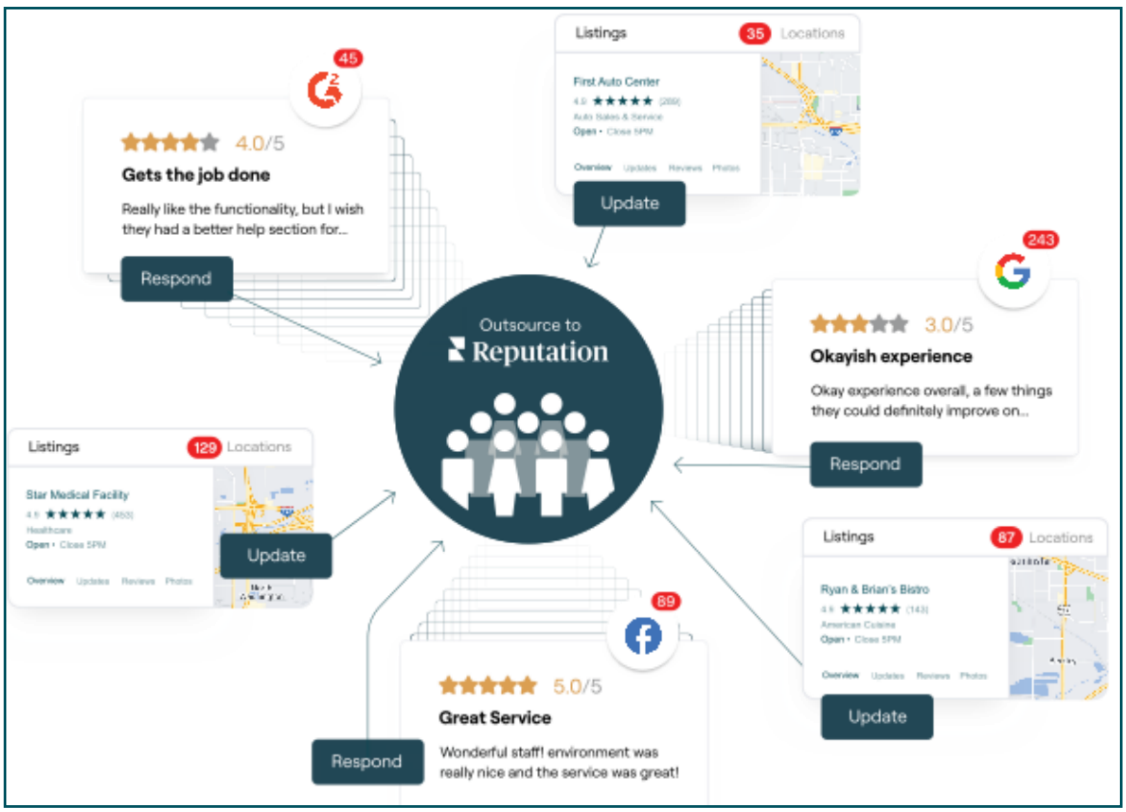
Premium Paid Services

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 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.

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



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13 | Additional Resources

Additional Resources

Additional User Guides

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

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

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- 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

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