

# Reviews

User Guide

 Reputation  
2025

# Table of Contents

<b>1   Reviews Overview</b>	<b>4</b>
<b>2   Manage Reviews</b>	<b>6</b>
Reviews Overview	7
<i>Filter the Reviews Page</i>	8
Ask Reputation IQ	10
Charts	13
<i>Average Star Rating</i>	13
<i>Ratings and Reviews</i>	13
<i>Sentiment Trend</i>	14
<i>Sentiment by Source</i>	15
<i>Response Status</i>	16
<i>Top Categories</i>	16
<i>Review Tracker</i>	17
Reviews Feed	17
<i>Review Components</i>	20
Tickets	21
<i>Manage Individual Reviews and Create Tickets</i>	21
<i>Create a Ticket</i>	22
Schedule a Report	23
<b>3   Responding to Reviews</b>	<b>25</b>
Best Practices for Responding to Reviews	26
<i>General Best Practices</i>	26
<i>Responding to Positive Reviews</i>	27
<i>Responding to Negative Reviews</i>	27
Respond from the Platform	29
<i>Review Response Statuses</i>	30
<i>Review Response From</i>	30

Disputing Reviews & Blocking Users .....	31
<i>Disputing Reviews</i> .....	31
<i>Blocking Users</i> .....	32
<i>Source Review Guideline Examples</i> .....	32
<b>4   Reviews Settings</b> .....	<b>34</b>
Manage User Summaries.....	35
<i>User Summaries</i> .....	35
Review Widgets.....	38
Managing Templates .....	41
<i>Add Templates</i> .....	41
<b>5   Premium Paid Services</b> .....	<b>44</b>
<b>6   Additional Resources</b> .....	<b>46</b>
Additional User Guides.....	47
Contact Support .....	48
<i>Best Practices for Technical Support Requests</i> .....	48

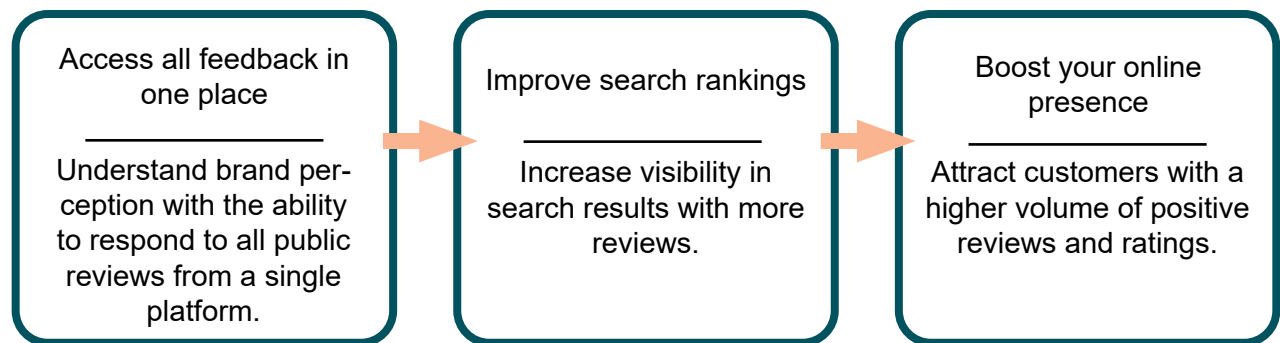
# 1 | Reviews Overview

# Reviews Overview

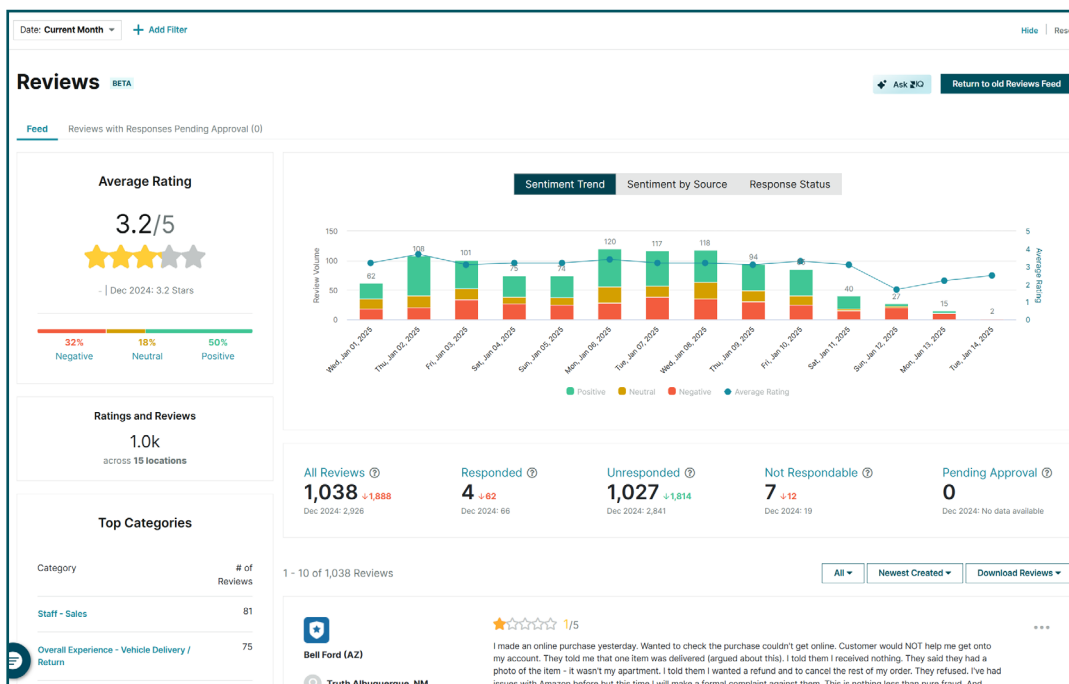
Attract customers, win more business, and improve customer experience by easily tracking, managing, and responding to customer reviews across various online platforms.

The Reviews module centralizes all reviews, effortlessly collecting feedback from third-party sites in one place. It enables you to monitor customer sentiments and respond publicly at scale, ultimately generating more business.

Following the instructions and best practices in this user guide enhances online presence, improves customer satisfaction, drives more business, and ensures proper brand management.



To access this module, click **Reviews** in the left menu. Under **Reviews**, access and manage review data, track recent reviews, monitor sentiment scores, analyze review trends over time, and more.



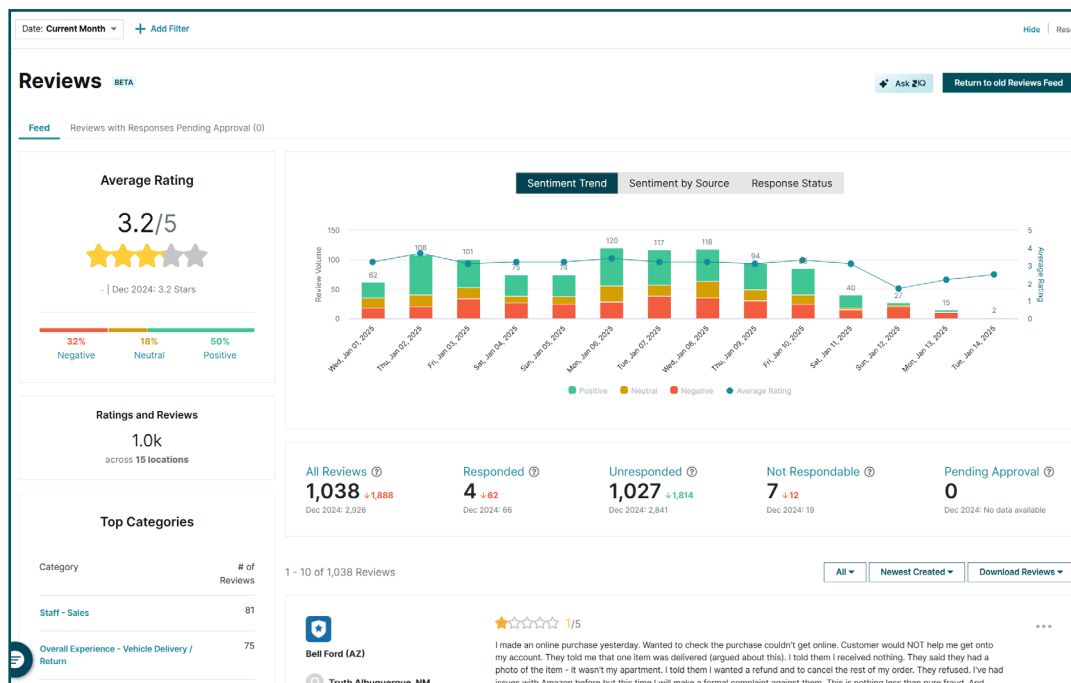
# 2 | Manage Reviews

# Manage Reviews

Easily monitor review sentiment over time and source, as well as responded versus un-responded reviews.

## Reviews Overview

The **Reviews** page is the central component of the Reviews module, providing a comprehensive view of all customer feedback from various online sources in near real time. This feature displays each review's details, including the rating, review content, sentiment, date, and attributions. Additionally, it shows the status of responses, so it is easy to track the reviews that have been addressed and which need attention.

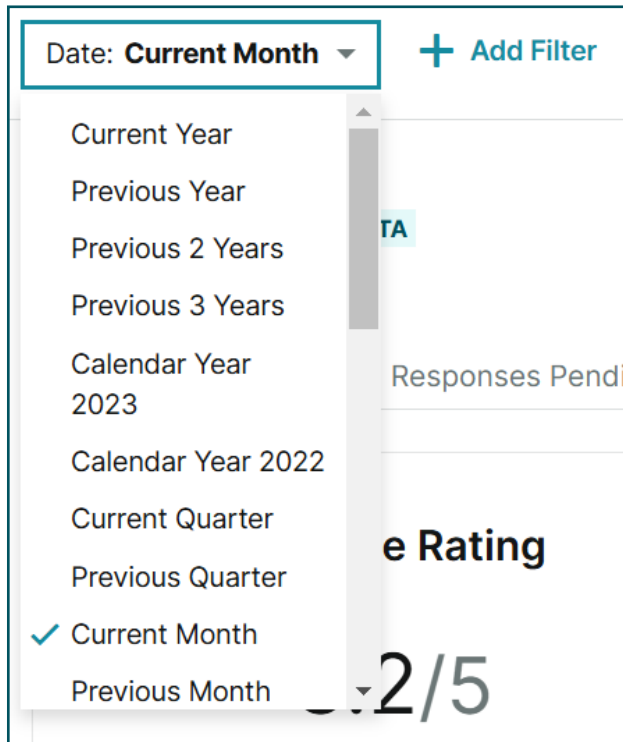


On the **Reviews** page:

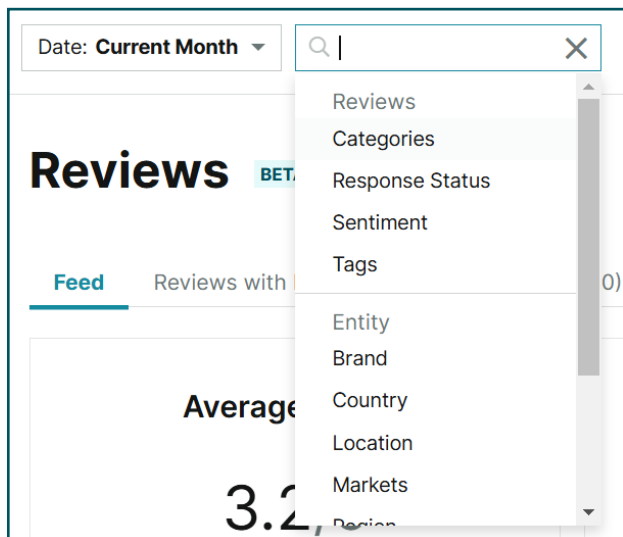
- Monitor and organize reviews.
- Forward third-party reviews.
- Publish and share reviews on a website or social channels.
- Export and share reviews.

## Filter the Reviews Page

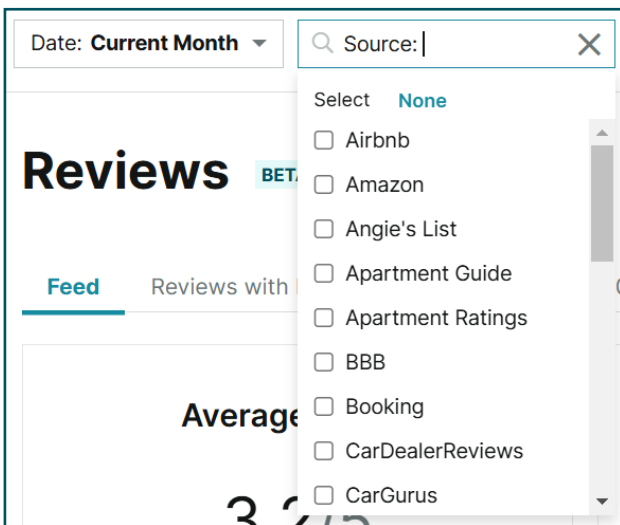
**Note:** The top-line filters apply to everything displayed on the **Reviews** page including the charts and the **Review Feed**.



1. Filter by the date or click **Add Filter** to provide more specific options.



2. Open the dropdown to select a filter category to add.



3. Click the check box to select the specific filter to apply.

- To reset the dropdown list, click **None**.
- To reset or hide all the filters, select the option in the top right.



The table below describes the available filter options. For customizable filters, contact your CSM.

Filter Options	Description
Date	Filter the reviews by years, quarters, months, weeks, days, or enter a custom time period.
<b>Reviews</b>	
Categories	Filter by specific review sentiment written in the reviews.
Response Status	Filter the reviews by if they were responded to, not responded to, unrespondable, or the response is pending approval.
Sentiment	Filter by whether the review is positive, negative, neutral, or none.
Tags	Filter by the tags included in the review.
<b>Entity</b>	
Brand	Filter by the brand the review was left for.
Country	Filter by the country the review originated from.
Location	Filter by the specific business location.
Markets	Filter by the market the review is for.
Region	Filter by a region the review was created in.
Source	Filter by the site the review originated from.
State	Filter by the state the review was made in.
City	Filter by the city the review was made in.

# Ask Reputation IQ

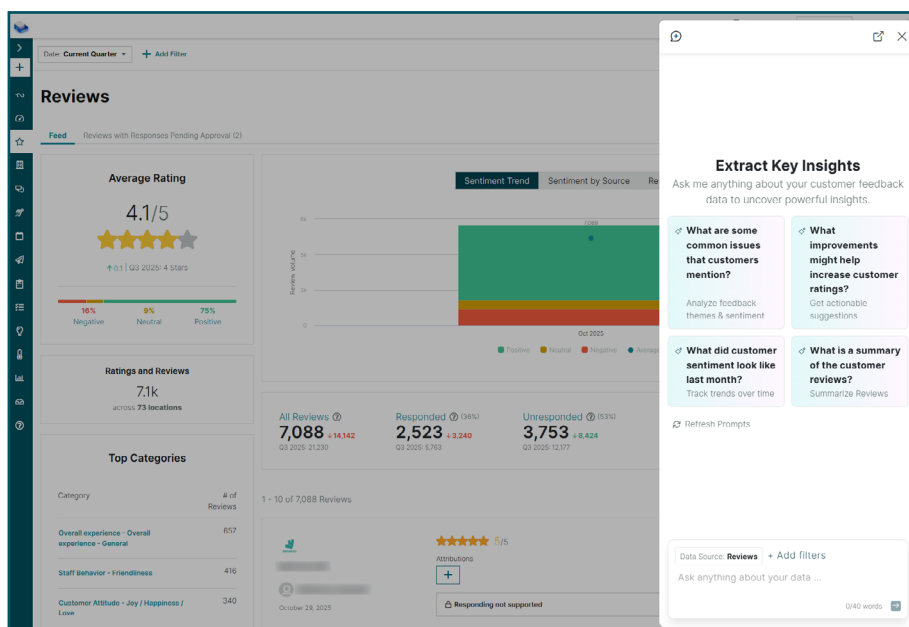
Ask Reputation IQ is an AI-powered conversational tool that allows users to easily extract key insights and make faster, data-driven decisions to improve the customer experience.

Use Ask Reputation IQ for a more efficient way to access insights about the review data collected in the platform while eliminating manual navigation and complex filtering.

1. In the Reviews module, click **AskIQ**.

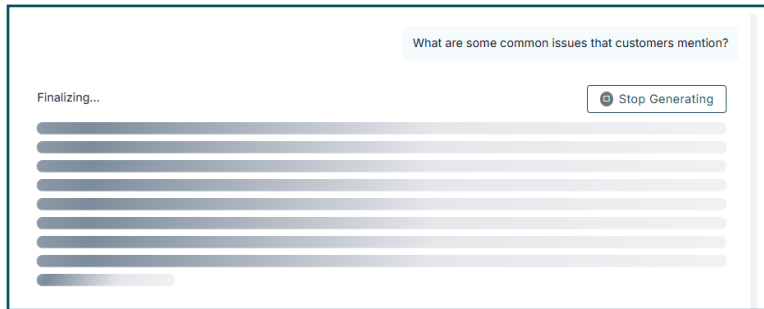


- Example prompts and a box to type questions displays.

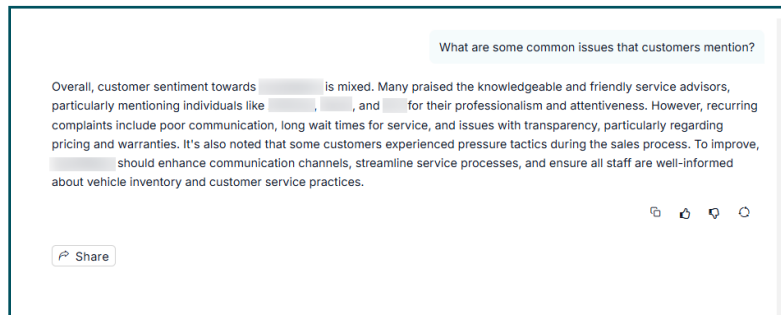


- a. Click **Refresh Prompts** to generate new prompts to choose from.
2. Click **+Add filters** to narrow the data sources the summary is pulled from.
    - a. Click **Apply** to include the filters.
      - The filters are available based on the tenant settings.
  3. Click one of the provided prompts or type a question (with up to 40 words) in the box and click the arrow in the bottom right corner.

- a. Click **Stop Generating** if needed.



- o Ask Reputation IQ generates a summary from the available data in the platform.



4. Click **Share** to share the generated results.

Share Conversation ✕

Format:

Public Link:

---

Recipients:

Subject:

Message:

- a. Click **Generate Link** to generate a public link to the results.
- b. Add the recipient users, roles, or emails.
- c. Edit the message subject and create a message to introduce the summary.
- d. Click **Share**.

5. Use the respective icons to copy, like, dislike, or regenerate the summary.



- a. Click the like or dislike icons to leave feedback about the quality of the AI response.

Provide Feedback ×

Please let us know why you liked the AI response.

Disclaimer: Feedback will help the Reputation team monitor qualities including accuracy, style, completeness, and appropriateness of responses from our AI service.

Reason(s)\*

Is accurate  Like the style  Has complete information

Appropriate  Other

Specific Feedback (Optional)

Type feedback...

Cancel

- b. Click **Submit** to send the feedback.

6. Click the + icon at the top to return to the main landing page or the X icon to close the AskIQ panel.

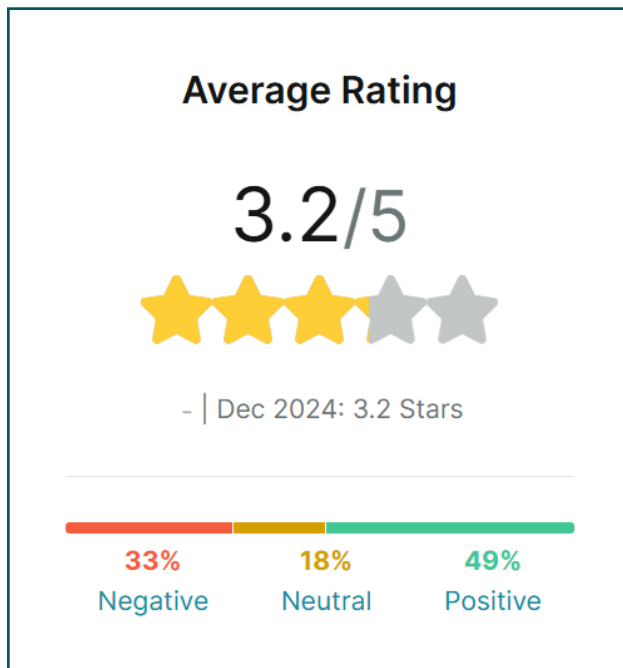


- a. Click the link icon to open the ReputationIQ module.

## Charts

The **Reviews** page contains interactive charts displaying aggregated review metrics. Use each chart to explore deeper insights into the reviews.

### Average Star Rating



This chart provides a visual representation of the business's average star rating, breaking down the percentage of positive ( $\geq 4$ ), neutral (3), and negative reviews ( $\leq 2$ ). The rating scale ranges from 1 to 5, measured to one decimal place.

This chart also displays customer satisfaction trends. Click on each segment of the bar (negative, neutral, positive), to gain deeper insights into the specific reviews that fall into each category and identify areas of strength and opportunities for improvement.

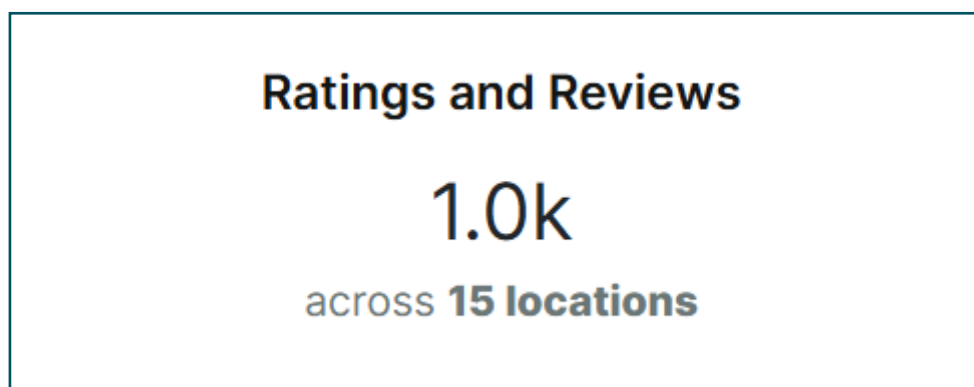
Use the top-line filters to determine which time period the chart displays. The **Average Rating** always shows the previous date range than what is selected in the filters.

- **Example:** Use the top-line filter to sort for this week. The data displayed in the Average Rating chart is from the previous week.

**Note:** If the percentages for all responded/un-responded reviews do not add up to 100, it is most likely because not all the review sources enabled for the account allow for review responses.

### Ratings and Reviews

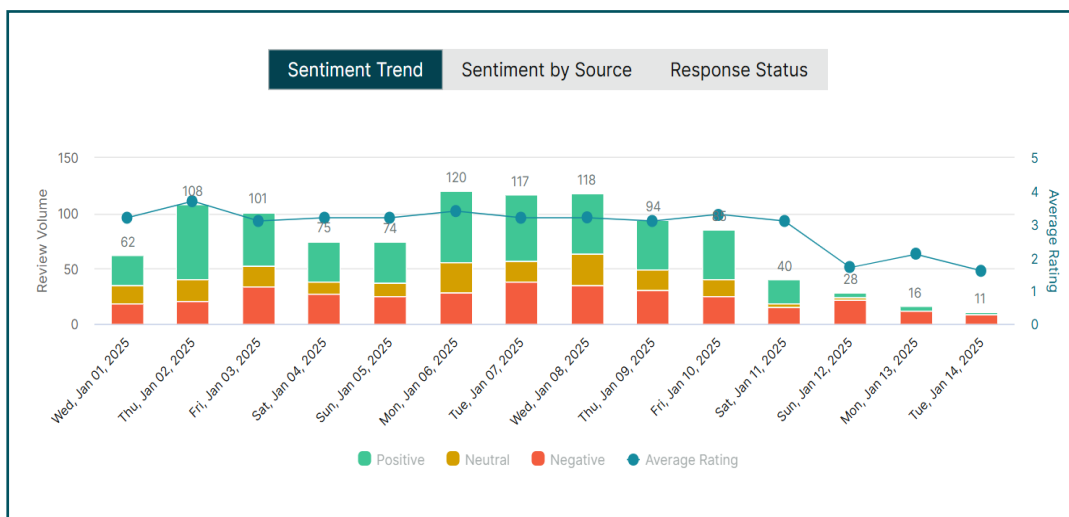
The **Ratings and Reviews** chart shows the total number of ratings and reviews across all locations.



## Sentiment Trend

The **Sentiment Trend** chart represents the trends in customer sentiment over a specified time period. It categorizes reviews into positive, neutral, and negative segments, and overlays the average rating to give a comprehensive view of sentiment trends.

- Blue line: Average Rating
- Gray numbers: Total Reviews
- Green bar: Total Positive Reviews
- Yellow bar: Total Neutral Reviews
- Red bar: Total Negative Reviews



Use this chart to identify patterns in customer feedback and assess the impact of changes in business practices. Hover over a blue dot to see the average rating.

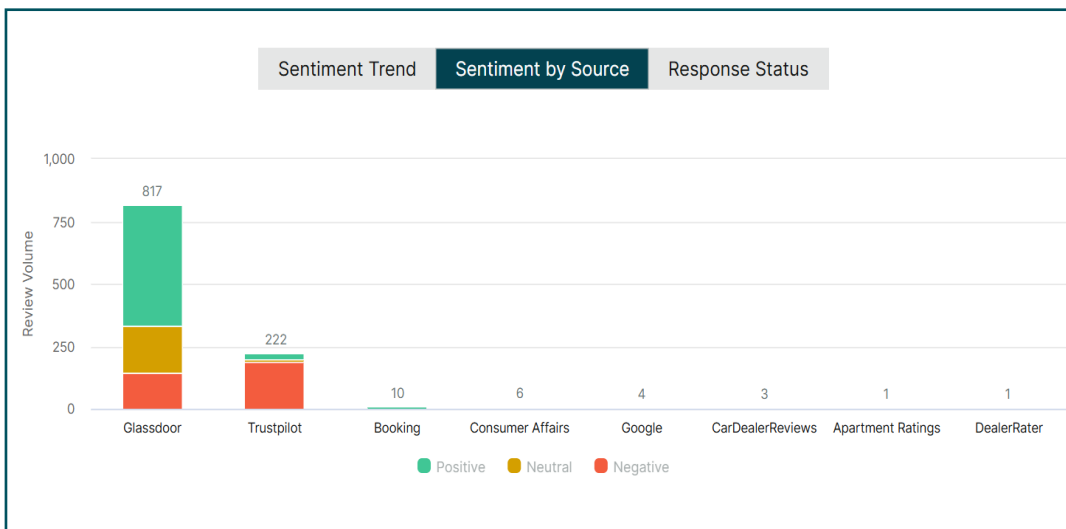
Click on a bar to sort the data and see detailed activities related to that specific period to understand what might have influenced changes in customer sentiment.

- **Example:** Observing a dip in the average rating during a particular month, click on that bar to investigate the underlying reviews and take corrective actions to improve customer satisfaction and overall reputation.

## Sentiment by Source

The **Sentiment By Source** chart displays the distribution of customer reviews across various review sources, categorizing them into positive, neutral, and negative sentiments. This helps identify which platforms contribute the most to the overall review volume and sentiment distribution.

- Gray numbers: Total Reviews
- Green bar: Total Positive Reviews
- Yellow bar: Total Neutral Reviews
- Red bar: Total Negative Reviews



This can prioritize engagement and response efforts based on the volume and sentiment of reviews from different sources. Click on a bar to filter the data and see detailed activities related to that specific source to understand the nuances of customer feedback on each platform.

- **Example:** If Google has a high volume of negative reviews compared to other sources, click the Google bar to investigate these reviews further and address recurring issues.

## Sources

One of the top-line filters available is for sources. The third-party review sites, such as Google and Facebook, are determined by the source groups selected. By default, all sources associated with the account are included in the filter. Depending on the industry, the sources associated with the account may vary.

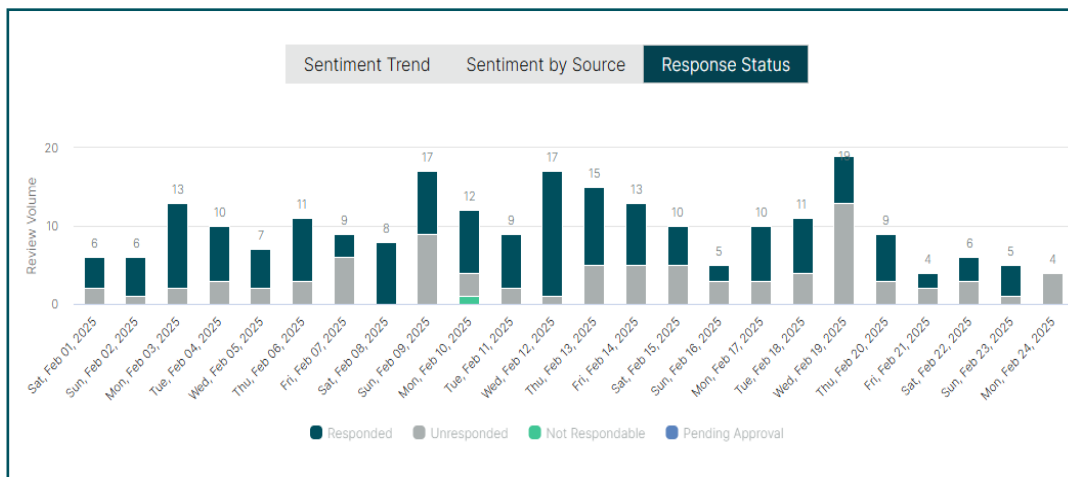
To access the list of relevant sources, go to **Admin > General Settings > Company Information**.

**Note:** To add a source, see [Contact Support on page 48](#).

## Response Status

The **Response Status** chart displays the status of the reviews. Each bar represents the reviews that are responded, unresponded, not responsible, and pending approval for a specified date.

- Gray numbers: Total Reviews
- Dark blue bar: Reviews that have received a response.
- Gray bar: Reviews with no response.
- Green bar: Reviews that cannot receive a response.
- Light blue bar: Reviews that are pending approval before they can be published.



This chart provides an overview of how effectively a team responds to customer reviews over time. It shows the total number of reviews for each month and indicates the portion that has been responded to versus those that remain unresponded.

## Top Categories

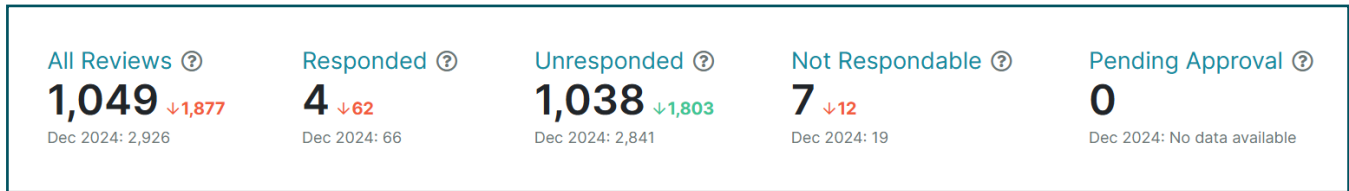
Top Categories	
Category	# of Reviews
<b>Staff - Sales</b>	83
<b>Overall Experience - Vehicle Delivery / Return</b>	82
<a href="#">View More with Insights</a>	

The **Top Categories** chart lists the available reviews in categories by sentiment. This displays the top five subjects most often discussed in the reviews.

1. Click on a category to filter the reviews with a specific sentiment.
2. Click **View More with Insights** to go the Insights page and see the category trends.

## Review Tracker

The bar under the first Review Feed chart displays the total reviews, the states of each review, and the specified filtered date. Click an option to see the number represented in the Response Status chart.



- **All Reviews:** Total number of reviews.
- **Responded:** Number of reviews with one or more responses from the business.
- **Unresponded:** Number of reviews without a response.
- **Not Responsible:** Number of reviews where responding is not supported.
- **Pending Approval:** Number of reviews with responses pending approval.

## Reviews Feed

In the **Reviews Feed**, easily streamline the process of monitoring and managing customer feedback by filtering the data.

Use the top-line filter dropdown menus to select or deselect the components to filter by. After a selection is made, click anywhere outside the filter menu to apply it.

Use the feed filters to sort reviews based on specific criteria. This ensures the ability to quickly locate and address reviews that require immediate attention.

Internally tag the reviews that may need more attention or need to be sorted as a group that is not already included in the filters.

Export, schedule, and forward reports of the filtered review feed data.

## Sort the Reviews

Use the review filters, located under the charts, to easily sort through the reviews.

The screenshot shows a review management interface. At the top left, it displays '# of Reviews' and '1 - 10 of 1,038 Reviews'. On the right, there are three filter buttons: 'All', 'Newest Created', and 'Download Reviews'. Below the filters, a review card is visible for 'Bell Ford (AZ)' with a 1/5 star rating. The review text reads: 'I made an online purchase yesterday. Wanted to check the purchase couldn't get online. Customer would NOT help me get onto my account. They told me that one item was delivered (argued about this). I told them I received nothing. They said they had a photo of the item - it wasn't my apartment. I told them I wanted a refund and to cancel the rest of my order. They refused. I've had issues with Amazon before but this time I will make a formal complaint against them. This is nothing less than pure fraud. And...'

All	
Flagged	Sort the reviews that have been flagged for additional attention.
Updated	Sort the reviews that have been interacted with on the original review site.
Unread	Each review is marked as unread by default until it has been manually marked as read.
Has Comment	Sort the reviews with at least one comment.
Has Media	Sort the reviews with photos, screenshots, gifs, or videos attached.
Pending Approval	Display the reviews with responses that are pending approval.
Update Response	Sort the reviews that have been updated and may require an updated response.
Newest Created	
Newest Created	Sort the reviews in descending order by the date the review was submitted.
Oldest Created	Sort the reviews in ascending order by the date the review was submitted.
Newest Activity	Sort by the reviews with the most recent status changes.
Oldest Activity	Sort by the reviews with the oldest status changes.
Download Reviews	
Download as PDF	Download the list of reviews as a PDF. <ul style="list-style-type: none"> <li>The PDF includes the filtered locations, the date of the reviews, the review sentiment, and the review responses.</li> </ul>
Download as CSV	Download the list of reviews as a CSV.
Download as Excel	Download the list of reviews as an Excel.
Schedule	Schedule a report of the reviews. <ul style="list-style-type: none"> <li>The report includes all the information displayed via the top-line filters.</li> </ul>
Forward	Forward the report of the reviews.

## Schedule the Export

Use the schedule option to schedule regular reports.

1. Under **Download Reviews**, select **Schedule**.
2. Modify the title of the report.
3. Specify the frequency the report should be sent out.
4. Select the format of the report, PDF, CSV, or Excel.
5. Ensure the **Status** is **Active**.
  - Change the **Status** to **Pause**, to prevent the report from being sent out.

6. In the **Recipients** field, add the users, roles, or email addresses of those who should receive the report. Click the plus to add multiple recipients if needed.
7. (Optional) In the **Message** field, write a custom message to include in the email that accompanies the report.
8. Click **Save**.

## Forward the Export

Use the forward option to forward the report.

1. Under **Download Reviews**, select **Forward**.
2. Choose the format of the report: PDF, CSV, or Excel.
3. Under **Recipients**, type the user, role, or email into the field and click the plus icon to add them to the list.
4. Enter the **Subject** for the email.
5. Include a message to be sent along with the report.
6. Click **Forward**.

**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).

## Review Components

Each review in the platform is composed of several key components that provide detailed information and context. Understand these components to manage and respond to reviews more effectively.

The screenshot shows a review interface with the following components highlighted by numbered callouts:

- 1**: Review source (Google logo)
- 2**: Name and link of review page source (blurred)
- 3**: Reviewer (blurred profile)
- 4**: Date (April 9, 2025)
- 5**: Review Status (Read, Responded, Updated buttons)
- 6**: View History (View History link)
- 7**: Star rating (5/5 stars)
- 8**: Attributions (+ button)
- 9**: Review text (Thanks for the review)
- 10**: Submitted (Submitted button)
- 11**: Reply field (Write your reply...)
- 12**: More options (three dots menu)

	Review Component	Purpose
1	Review source	This is the site where the customer posted their review. <ul style="list-style-type: none"> <li>Only sources enabled for the account with page URLs loaded for each location are listed.</li> </ul>
2	Name and link of review page source	Location the review is about. <ul style="list-style-type: none"> <li>Additional metadata may appear depending on the review source.</li> </ul>
3	Reviewer	Depending on review site settings, profiles of the reviewer may include a photo, first and last name, and a hyperlink to the reviewer's site profile. (This may show as Anonymous if the review site does not require the reviewer to register.)
4	Date	The date the review was created.
5	Review Status	Tags a review to allow for easy sorting. Status options include Responded, Published, Updated, View Ticket, and Update Response.  Change the response status by submitting a response or manually choosing a status from the ellipsis of the review.
6	View History	If the response has been updated, use the View History link to see a change history log for that review.
7	Star rating	Shows the reviewer's star rating and any additional comments. <ul style="list-style-type: none"> <li>Additional metadata may appear depending on the review source.</li> </ul>

	Review Component	Purpose
8	Attributions	<p>These are manual attributions a user can add to a review.</p> <ul style="list-style-type: none"> <li>• <b>Example:</b> If a review highlights excellent work, a user on the platform can tag the relevant person.</li> </ul> <p>The individual being tagged must already be added as a user within that tenant.</p>
9	Review Response	The response sent by the business. For more information about sending responses, see <a href="#">Respond from the Platform on page 29</a> .
10	Review categories	Categories describe the review comments and are automatically applied using text analytics from the platform's data science engine.
11	Review response	<p>If the review has already been responded to, the response is visible. If not, a response window displays.</p> <p>If no response or response window displays, the account requires credentials from the source review site. Credentials are verified in 24–48 hours.</p>
12	Ellipsis menu	<ul style="list-style-type: none"> <li>• <b>Mark read</b> <ul style="list-style-type: none"> <li>◦ Mark the review as read. This removes it from the list when the review feed is sorted by unread.</li> </ul> </li> <li>• <b>Flag</b> <ul style="list-style-type: none"> <li>◦ Flag the review to come back to later. This can be sorted by the review feed filters.</li> </ul> </li> <li>• <b>Share</b> <ul style="list-style-type: none"> <li>◦ Share this review via a widget on a website.</li> </ul> </li> <li>• <b>Forward</b> <ul style="list-style-type: none"> <li>◦ Forward the specific review.</li> </ul> </li> <li>• <b>Provide Feedback</b> <ul style="list-style-type: none"> <li>◦ Add internal feedback about a sentiment on the review.</li> <li>◦ This opens a new comment for the review.</li> </ul> </li> </ul>

## Tickets

### *Manage Individual Reviews and Create Tickets*

- **Manage Reviews Directly:** Use options such as marking reviews as read, forwarding them to team members, flagging them for further attention, and creating tickets for follow-up actions directly from the Reviews Feed.
- **Mark a Review as Read/Unread:** Apply an internal indicator among the review team. Other users on the account can sort reviews by the Unread status. This indicator is not visible on the review site.

- **Flagging a Review/Unflagging:** Applies an internal indicator for a review that may require further investigation among the team. Other users on the account can sort reviews by the flagged status.
- **Publishing/Unpublishing:** Reviews with a star rating only (no comment attached) are omitted from applicable Reviews widgets. Use the publish option to apply an override to that setting. This option does not publish or unpublish reviews from the source site.
- **Forwarding Reviews:** Send an email with the selected review 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. Emails include all the review metadata, including a link to the original review site. Forwarding is a quick way to bring a review to someone else's attention for praise or coaching.
- **Sharing Reviews:** Post a review to the account's linked social media sites (Facebook (Meta), X (Twitter), Instagram, and Google Business Profile).

**Note:** Auto responses only apply to ratings without text. Reviews that include text are not eligible for auto responses.

- **Create Ticket:** If a review needs further escalation, create a ticket to forward the reviewer's comments to the appropriate team so they can address it.

## Create a Ticket

Create a ticket from a review to ensure specific feedback is addressed by the appropriate team.

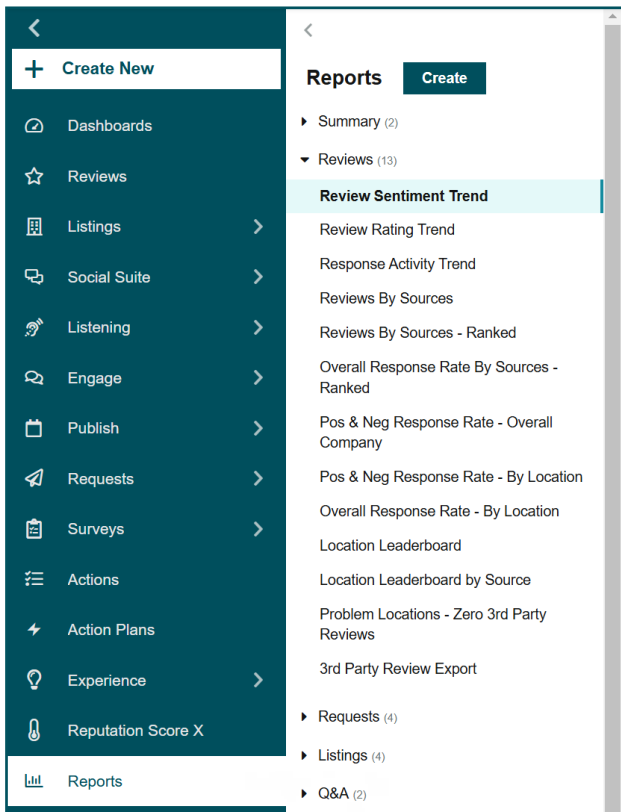
1. Find the review to create a ticket for.
2. Click on the ellipsis (three dots) menu located in the review.
3. From the dropdown menu, select **Create Ticket**.
4. Complete the ticket details:
  - **Assign To:** Select the appropriate queue or team to handle the review.
  - **Assign Queue:** Choose the specific queue for the ticket.
  - **Set Stage:** Select the stage of the process the ticket is in (e.g., New, In Progress, Resolved).

**Notes:** Add any internal notes that provide context or additional information about the review.

5. When all required fields are filled out, click **Create** to generate the ticket.
  - A **View Ticket** link displays on the review, allowing quick access to manage the ticket.

# Schedule a Report

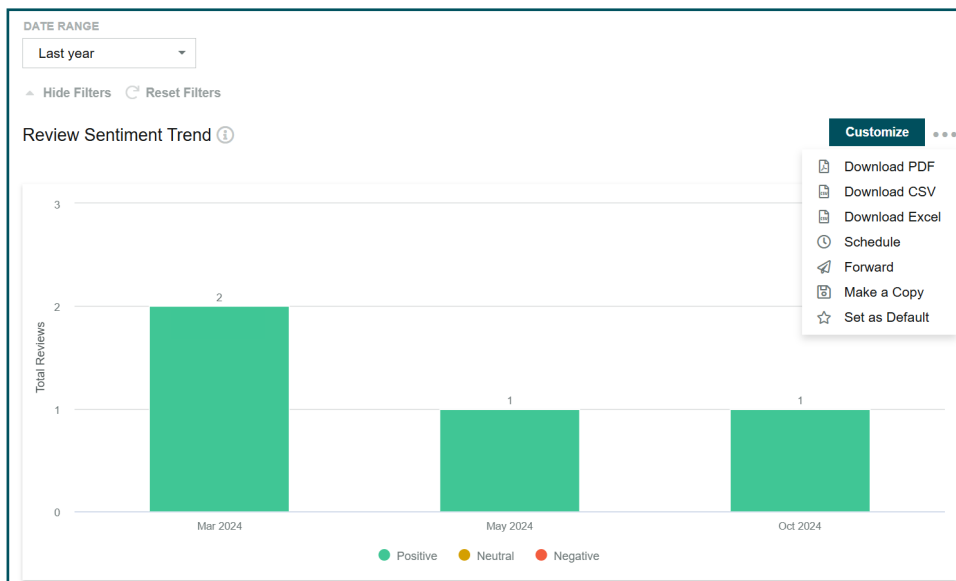
Scheduling regular reports can keep a team informed about review trends and responses.



To schedule a report,

1. In the left navigation menu, go to **Reports > Reviews**.

2. Customize the report as needed.
3. Click on the ellipsis located in the Reviews Feed.



4. Select **Schedule** from the dropdown menu.
5. In the **Schedule Report** dialog box, enter a name for the report in the **Name** field.
6. Set the Frequency for how often to send the report (e.g., Daily, Weekly, Monthly).
7. Choose the day of the week or month when the report should be sent.

**Note:** When setting up scheduled reports for delivery in months that have fewer than 30 or 31 days, the initial report covers the period from the setup date to the first scheduled send date. After, the reports continue to follow the selected frequency, adapting automatically to the number of days in each month.

8. Choose the desired format for the report: PDF, CSV, or Excel.
9. In the **Recipients** field, add the users, roles, or email addresses of those who should receive the report. Click the plus to add multiple recipients if needed.
10. (Optional) In the **Message** field, write a custom message to include in the email that accompanies the report.
11. Ensure the report is set to **Active**.
  - To pause the report, select **Paused**.
12. Click **Save** to finalize and schedule the report.

**Note:** For more information, see the [Reports User Guide](#).

# **3 | Responding to Reviews**

# Responding to Reviews

Increasing response rate is something to do immediately to show current and potential customers that you care, gain new business, and improve your Reputation Score.

Responding to reviews is key to a great customer experience and strong Reputation Score.

- Use positive reviews as an opportunity to encourage repeat service and satisfaction.
- Use negative reviews as a service recovery opportunity by de-escalating an issue, inviting the reviewer to move the conversation offline, and ultimately reducing customer churn.

## Best Practices for Responding to Reviews

The **Reviews** page allows the user to respond to reviews from multiple review sources from within a single location. Use the top-line filters, the Average Rating, or bars in the chart to apply secondary filters.

Responding to reviews is an essential step in creating and maintaining loyal customers.

Consumers need to see responses that are courteous and a direct method to contact them. Even a negative review is often looked at more favorably if the business responded.

Increasing response rate improves your Reputation Score. Respond to 100% of negative reviews and at least 20% of positive reviews. Over time, set goals for maintaining these rates consistently and improving upon them.

### *General Best Practices*

No matter the rating, there are several best practices for responding to reviews.

- Respond promptly but not hastily.
  - Set a goal to respond to reviews within a designated time frame (e.g., 48 hours).
  - Respond thoughtfully. The Reputation Retail Consumer Report found that 33% of consumers who received a prompt response to a negative review subsequently posted a positive one.
- Be polite and courteous.
  - Remember a response is not directed to one person. Other customers or potential customers can see the responses. Always be respectful, even if the customer review was unfavorable or unfair.

- Decide who responds to reviews.
  - Depending on the number of received reviews, it might be necessary to designate a person to respond to the reviews or split the task equally among employees. Ideally, anyone responding should have excellent writing skills.
  - 89% of consumers are “highly” or “fairly” likely to use a business that responds to all of its online reviews (BrightLocal, 2022).
- Take advantage of the approval workflow, especially if customer information is sensitive.
  - **Example:** Healthcare businesses must be careful not to violate HIPAA regulations when reviews contain Personal Health Information (PHI). An approval workflow empowers more employees to craft responses, while relying on a trained gatekeeper to spot-check all reviews before they are published.
- Check for typos.
  - Some review sites do not allow changes to be made after a review or response is posted. Take the time to double-check spelling and grammar.

## *Responding to Positive Reviews*

To keep customers who write positive reviews coming back, acknowledge the value of their feedback. A response is an opportunity to thank the customer—not only for their business, but for taking the time to share their experiences.

Within the response, reiterate what the customer found positive. Include some detail to show them and future customers that someone is reading the reviews.

For reviewers who do not leave comments (or minimal comments), ask them what you can do better. Find out what will make their next experience truly exceptional or consider asking what it takes to earn the missing star(s).

### **Example:**

“Thank you for sharing your experience with us! The fact that you mention our customer service means a lot to us. It was our pleasure serving you, and we hope to see you again soon.”

“Thanks for the positive review! Please let us know if there is anything we can do to improve your experience during your next visit.”

## *Responding to Negative Reviews*

It is not possible to control what people say online, but it is possible to take part in the conversation. A few low ratings adds legitimacy to the business when they are viewed by potential customers.

- Even if the review was harsh or unfair, take the high road to show the customer (and future customers) professionalism.

- Do not take negative reviews personally.
- Do not respond defensively.
  - By being defensive, it is possible to inadvertently write something that could be worse than the actual review.
- For the most negative reviews, invite the customer to contact you (or if you know who the person is, contact him/her directly). This technique shows commitment to resolving the issue while keeping details private.
- After agreeing upon a resolution with the customer offline, ask them to modify or remove the review.
  - Never provide incentives in exchange for writing or altering reviews. Simply explain how valuable the feedback is to you personally.
  - If the customer does not modify the review after a provided a resolution, return to the original online conversation and thank them for the chance to fix the issue. In doing so, other customers can see the closed loop.

## Example:

“We regret to hear that you had a negative experience with us but would appreciate the chance to turn your experience around. A customer experience manager will be in touch with you directly, to help you resolve your issue. Or feel free to reach our Service Manager directly at [phone] or [email].”

- Research facts before responding to a review.
  - Determine if there are reasonable steps that can be taken to resolve the situation without needing to settle or reward the customer.
  - A customer typically tolerates a problem not being fully fixed as long as the underlying process is seen as fair. Do not take on or look to assign blame, but own up to honest mistakes.
- Do not ignore threatening or abusive reviews.
  - If a reviewer’s comments become threatening, respond quickly and respectfully.
  - If necessary, depending on the content, consider alerting a legal team for assistance if an antagonistic situation might get out of hand.

## Example:

“Thank you for alerting us to an important training issue. We have corrected the problem and hope you will give us another chance.”

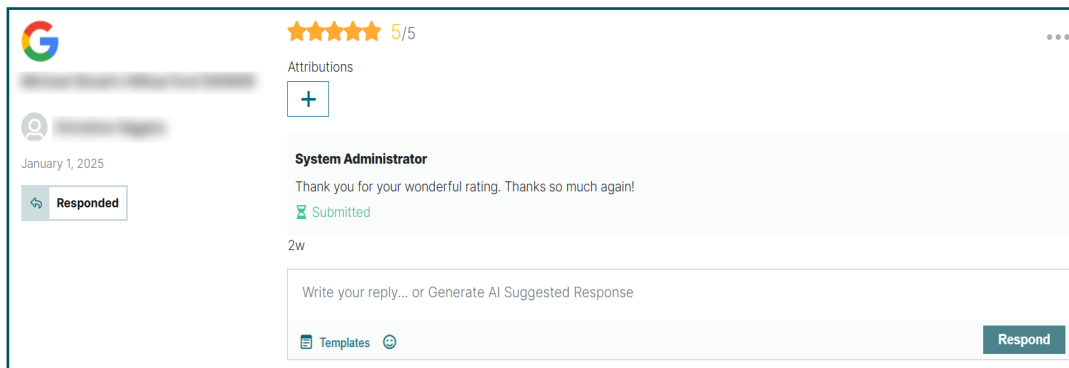
“Thank you for taking the time to leave us this feedback of your experience. If you’re willing, please contact us at [phone] or [email] so that we may discuss this issue further.”

# Respond from the Platform

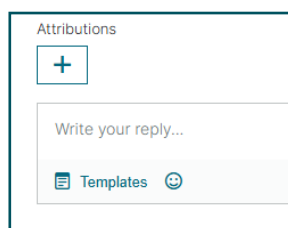
**Note:** To respond to reviews from within the platform, ensure the correct credentials are entered for each location's review sites. Not all review sites allow responses (see **Admin > General Settings > Sources**).

To respond to a review,

1. Click inside the **Review** window to type a response.



- a. Click **Templates** to use a template or AI generated message in the review response. For more information on how to create templates, see [Managing Templates on page 41](#).



- If a customer submits a review that contains a star rating but does not include additional or specific comments, an auto-response can be configured under **Settings > Admin > Auto Responses**. The list includes both positive responses for 4- or 5-star ratings and negative responses for 1- or 2-star ratings (3-star ratings do not receive auto-responses because these ratings are neutral and there is no way of gauging the appropriate response).

**Note:** Analyze how the response complies with the brand standards by using Voice of Brand. To gain access to Voice of Brand, contact Reputation. See [Contact Support on page 48](#) for more information.

2. If using Voice of Brand, click **Analyze** to analyze how the response aligns with brand guidelines.
  - a. When the text has been analyzed, and a green thumbs up displays, click **Publish** to publish the response. For more information about Voice of Brand, see the [Insights User Guide](#).

b. When a red thumbs down displays, the response does not align with brand guidelines. Rewrite the response or click **Publish**.

- Templates and AI Responses usually do not need to be analyzed because they are normally created in line with the brand guidelines.
- The Voice of Brand analyzes the text in the response.

3. Click **Publish**.

- The review is immediately available to view within the Reviews page; however, the response does not display on the third-party review site until indicated by a Live status.

## Review Response Statuses

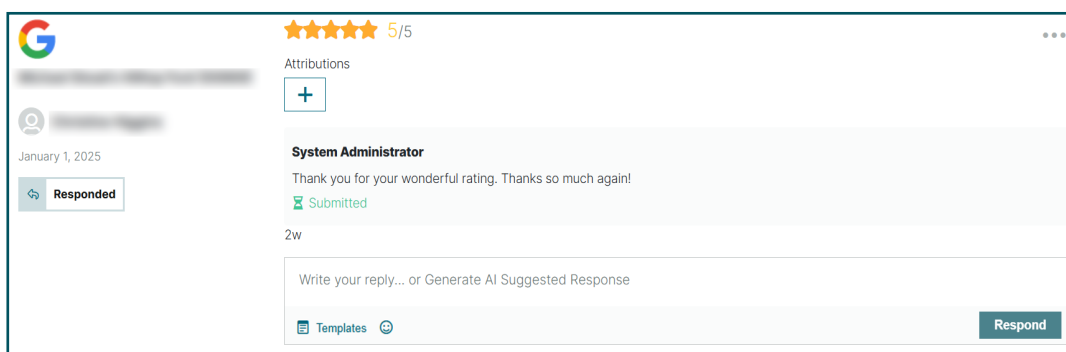
After submitting a review response from the platform, a response status displays. Statuses change automatically based on the conditions.

Status options include:

- **Pending:** A review response has been submitted but has not been posted to the third-party site yet, or the review response team has marked this response as not having valid credentials.
- **Pending Approval:** Only available when response approvals are turned on. These are responses that have been submitted by users who do not have approval permissions (or a Responder role). Responders can edit responses, while Approver roles can edit and/or approve responses.
- **Posted:** The review response has been posted to the third-party review site but has not been verified as live on that site by the platform.
- **Live:** The review response has been verified on the third-party site.
- **Failed:** The review response failed to post on the third-party site because of failed API integration or failed moderation.

## Review Response From

Customer-facing responses are posted to each review site using the **From** label specified by each review site's account settings. However, within the **Review** page of the platform, a **From** label is typically the name of the person on the account who initiated the response. In the picture below, the **From** label is **System Administrator**.



This name is not visible to the customer, but it is helpful for other users on the account to know who provided the response—especially if the account has managed services.

If **Business Owner** is listed, it indicates the response was pulled from the review source site and was not initiated from within the platform.

## Disputing Reviews & Blocking Users

### *Disputing Reviews*

If a particular review was mistakenly given (i.e., meant for another company) or contains slander/inappropriate language, work within the review site to request the review be removed or report a violation.

**Note:** Reporting reviews must be done via the review site, as it is not possible to do so within the Reputation platform.

Do not request a review removal just because it is negative. In the end, if the negative review cannot turn into a positive one, let it go. Attempting to remove a negative review can aggravate the situation and lead to additional comments. Instead, focus on building a wealth of positive reviews.

Click the business icon in the review to go to the page and look for options available on the post.

- **Example:** Within the Google Review window, click the ellipsis and choose to report the review to Google.

Do not pursue a review removal request unless the review meets the site's violation policies.

## Blocking Users

When blocking a user from following a page on Facebook, the user's review posts remain. However, comments the user made on other reviews or posts are no longer displayed.

**Note:** Blocking users must be done via the review site, as it is not possible to do so within the Reputation platform.

## Source Review Guideline Examples

Source	Guidelines
Google	<p>Google's prohibited and restricted content includes:</p> <ul style="list-style-type: none"> <li>• <b>Civil discourse:</b> Harassment, hate speech, offensive content, personal information.</li> <li>• <b>Deceptive content:</b> Fake engagement, impersonation, misrepresentation.</li> <li>• <b>Mature content:</b> Obscenity, adult -themed content, violence, and gore.</li> <li>• Regulated, dangerous, illegal, and terrorist content.</li> </ul>
Facebook	<p>Facebook is committed to:</p> <ul style="list-style-type: none"> <li>• Authenticity</li> <li>• Safety</li> <li>• Privacy</li> <li>• Dignity</li> </ul> <p>Facebook removes content that contradicts these values.</p>
Glassdoor	<p>Glassdoor encourages reviewers to think about work from different perspectives and include pros and cons to provide a balanced review. Glassdoor does not:</p> <ul style="list-style-type: none"> <li>• Allow reviews that include negative comments about identifiable individuals outside of the group, certain profanities, threats of violence, or discriminatory language.</li> <li>• Accept reviews that reveal confidential, non-public internal company information.</li> </ul>
Cars.com	<p>Cars.com will remove or modify your review if it contains prohibited content, such as:</p> <ul style="list-style-type: none"> <li>• Obscenities, discriminatory language, or defamatory or inappropriate comments.</li> <li>• Any form of harassment, threats, lewdness, or bigotry; language that constitutes or encourages illegal activity.</li> <li>• Advertisements, spam content, or contact information.</li> </ul>

Source	Guidelines
Healthgrades	<p>Don't post content on Healthgrades that:</p> <ul style="list-style-type: none"> <li>• Is libelous, defamatory, harassing, threatening, or inflammatory.</li> <li>• Uses obscenities, profanity, or discriminatory.</li> <li>• Is misleading, deceptive, or fraudulent content.</li> <li>• Contains personal information, personal website links, etc.</li> <li>• Mentions or endorses specific brands including pharmaceuticals.</li> <li>• Mentions legal matters or proceedings.</li> </ul>
Apartments.com	<p>Reviews on Apartments.com should not:</p> <ul style="list-style-type: none"> <li>• Be false or misleading.</li> <li>• Infringe or violate any third-party's intellectual property.</li> <li>• Violate any law statute, ordinance, or regulation including fair-housing, anti-discrimination, and more.</li> <li>• Include information from other websites, contact information, or spam content.</li> </ul>

# 4 | Reviews Settings

# Reviews Settings

## Manage User Summaries

Summaries are a notification type that allow those on the account to receive an email digest that captures review activity on third-party sites.

Admin privileges are needed to add or modify notifications. For assistance, see [Contact Support on page 48](#).





















### User Summaries

User summaries are associated with a particular user on the account. Summaries configured at the user level are delivered only to the selected user's email address. Configure different summaries per user. Summaries are not available to configure for more than one user at a time.

### Configure a User Summary

To configure a user summary for other people on the tenant.

1. From the top, right corner of the platform, click **Settings**.
2. From the left navigation menu, click **Users**.
3. Select the user.
4. Click **My Notifications**.

Name	Mode	Frequency	Status	Actions
New Summary Notification	Email	Monthly	<input type="checkbox"/>	   
New Summary Notification	Email	Monthly	<input type="checkbox"/>	   
New Summary Notification	Email	Monthly	<input type="checkbox"/>	   
New Summary Notification	Email	Monthly	<input type="checkbox"/>	   
New Summary Notification	Email	Monthly	<input type="checkbox"/>	   

- The list of all alerts for the selected user is shown by default.
  - To send a summary email to the user immediately, click the **Send Now** icon.
  - To modify the summary settings or to inactivate a summary configuration, click the **Edit** icon.
  - To permanently delete the summary configuration, click the **Delete** icon.
5. Click **Create Notification**.



## 6. Select an event.

General Information **My Notifications**

### Select Event

Select the event for which you want to create a notification

Select

Cancel Next

## 7. Modify the following settings:

- **Rule Name:** The name to identify the notification rule.
- **Channel:** The way the notification is sent.
- **Frequency:** How frequently to send the summary email: Immediately, Daily, Weekly, Monthly, or Quarterly.
  - If the channel for SMS, Mobile Push, or Platform Tray is selected, the only frequency available is Immediate.
- **Keywords:** Add extra keywords to include for the notification.
- **Group Similar Emails\*:** Send one email for several notifications.
- **Email Subject\*:** The subject of the notification email.
  - Insert a variable if needed.
- **Email Custom Message\*:** Add a message to be sent along with the notifications.
  - Insert a variable if needed.
- **Alert For:** Pick specific filters to alert for.
  - Click **Show Locations** to filter the notification for a specific location.
- **Source:** Filter the notification for reviews submitted from a specific source.
- **Sentiment:** Filter the notification for reviews submitted with a specific sentiment.
- **Show Responses:** Turn on to receive the responses to the review with the notification.

*\*These options are only available when **Email** is selected.*

General Information **My Notifications**

**New Review**

Rule Name:

Channel:  Email  SMS  Mobile Push Notification  Platform Notifications Tray

Frequency:

Keywords:    
No keywords

Group Similar Emails:  YES  NO

Email Subject:

Email Custom Message:

Alert For:  Selected Locations (All):

Reset Selections

Source:

Sentiment:

Show Responses:

8. Click **Save**.

To configure a summary for a logged in user,

1. Go to **My Account > Notifications**.

- Summary configurations here also display under the **User > Notification** screen.

My Account

General Settings

Locations

Users

Roles

Actions

Auto Responses

Automation

Automation (Beta)

General Information **My Notifications**

Notification Settings

Review

Name	Mode	Frequency	Status	Actions
New review - notif 11/8	Email, In-App	Immediate	<input checked="" type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
Now Review Alert	Email, In-App	Immediate	<input checked="" type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>

2. Follow steps 4–7 above.

The summary becomes active and sends an email to the selected user according to the designated frequency.

If authorized locations are already specified in the user profile, do not specify them again in the notification settings. The user profile level automatically cascades location settings to all related notifications, which prevents modifying individual notification properties. Modifying location settings within a notification changes at the user profile level no longer apply to the selected notification.

This process may take several minutes for a large number of locations.

## Review Widgets

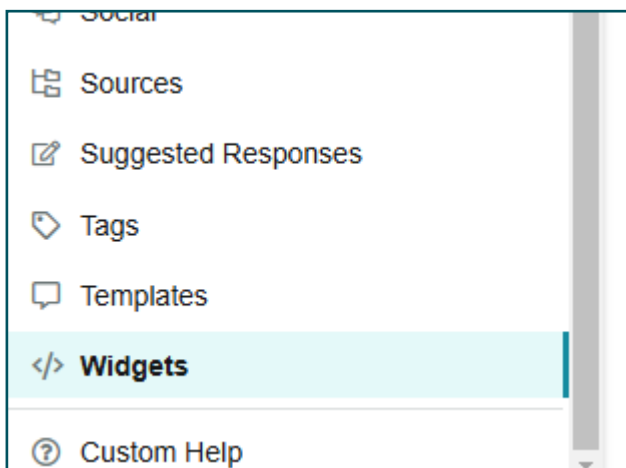
Create a Reviews widget to display customer reviews directly on a website.

Posting dynamic reviews on a website allows prospective customers/clients to get a snapshot of what other customers are saying about the business from a variety of review sites.

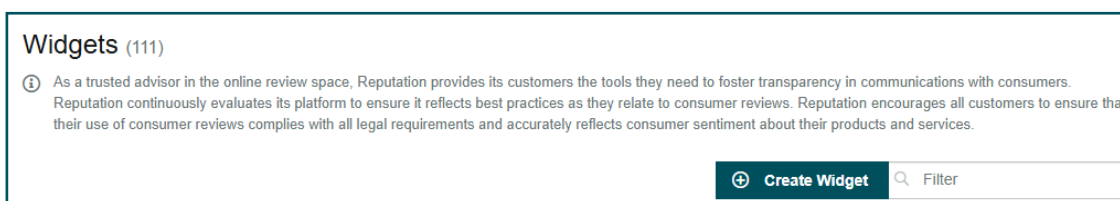
**Note:** Admin privileges are necessary to add or modify widgets.

### Configure a Widget

1. From the top, right corner of the platform, click **Settings**.
2. In the left panel, scroll down and select **Widgets**.



3. Click **Create Widget**.



4. Under the **Type** dropdown, select **Reputation Reviews**.

The screenshot shows a dropdown menu for the 'Type' field. The menu is open, displaying several options: Reputation FAQ, Reputation Inbox, Reputation NPS Score, Reputation Reviews (which is highlighted), Reputation Score, and Reputation Summary. To the right of the dropdown are 'Cancel' and 'Save' buttons.

5. Select the settings for the Reviews widget.

The screenshot shows the 'Create Widget' settings page for 'Reputation Reviews'. The settings are as follows:

- Type:** Reputation Reviews
- Version:**  Reviews 2.0 (Newer version of reviews widget),  Reviews 1.0 (Older version of reviews widget)
- Name:** [Empty text field]
- Level:** Tenant
- Review Sites:** All | None
  - Google
  - BBB
  - HealthGrades
  - MyReputation.com
  - Survey
  - ZocDoc
  - Facebook
  - DocSpot
  - MD.com
  - RateMDs
  - WebMD
- Reviews per Page:** 10
- Show Summary:** Yes , No
- Business Name:** Tenant , Location

On the right, there is a 'Preview' section showing a list of reviews with star ratings and dates. A 'View Actual Width' link is also present.

Setting	Description
Type	The type of widget.
Version	The version of the widget.
Name	The label of the widget.
Level	Restrict to regions, city, state, service type, or apply it to the entire tenant.
Review Sites	The sites the displayed reviews are from.
Reviews per Page	The number of reviews displayed in the widget window.
Show Summary	Show the text in the review along with the star rating.
Business Name	Select a specific location if needed.
Show Business Name	Display the full business name next to the review source note.
Show Reviewer Name	Show the name of the person who left the review.

Setting	Description
Show Responses	Show the responses to the review/
Show Date	Show the date the review was posted.
Show Review Page Links	Show a link to the page where the review was left.
Paging Animation	Turn on the animation for the widget. This automatically slides the reviews to the next page in a carousel style.
Width	Determine the width of the widget.
Height	Determine the height of the widget.
Background Color	Choose the background color of the widget.
Text Color	Choose the color of the text in the reviews.
Advanced > SEO Enabled	Under the Advanced option, check to enable SEO for the widget.

6. Click **Save**.

For more information about setting up a widget on a website, see [Contact Support on page 48](#).

# Managing Templates

Use Templates to add or modify the available text in the templates option of the Review Response window. These options help review responders to respond more efficiently and add variety.

Admin privileges are needed to add or modify templates. For assistance, see [Contact Support on page 48](#).

## Add Templates

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

Name	Body	Modules	Level	Sentiment	Actions
Regret to hear of this experience	{{reviewer-name Hi}}, we regret to hear that you had a negative experience with us, but would appreciate the chance to turn your experience around.	Actions, Reviews	System	Negative	
Unacceptable behavior	Hi {{reviewer-name there}}, we can assure you that we do not find this type of behavior acceptable, and we would like to address the situation you have described.	Actions, Reviews	System	Negative	
Thanks for taking time 3	Hi {{reviewer-name there}}, thank you for taking the time to let us know about your recent experience. We are disappointed to hear that you are not satisfied with your visit.	Actions, Reviews	System	Negative	
Upsetting to hear	{{reviewer-name Hello}}, it's upsetting to hear that you did not receive the top-notch service we strive to provide.	Actions, Reviews	System	Negative	
Regret to hear 1	Hi {{reviewer-name there}}, we regret to hear that you are displeased with your recent experience with us.	Actions, Reviews	System	Negative	
Disappointed to hear	{{reviewer-name Hi}}, we're disappointed to hear of the negative experience you had at our location.	Actions, Reviews	System	Negative	
Thanks for taking time 1	Thank you again for taking the time to let us know how we did. We hope you have a great day!	Actions, Reviews	System	Positive	
Don't hesitate to reach out 4	If you have any further questions, please give us a call. We're always happy to help!	Actions, Reviews	System	Positive	
Look forward to next visit 2	We look forward to your next visit! Take care!	Actions, Reviews	System	Positive	
See you soon	We hope to see you soon!	Actions, Reviews	System	Positive	
Thanks again 4	Thanks again for taking the time to leave us this information about your recent visit. Take care!	Actions, Reviews	System	Positive	
Don't hesitate to reach out 3	If you ever need anything else from us, please feel free to give us a call or stop by. Have an awesome day!	Actions, Reviews	System	Positive	

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

## 4. Complete the following fields:

The screenshot shows a form for creating a review template. The fields are as follows:

- Name\***: Text input field containing "Example".
- Modules\***: Dropdown menu set to "All".
- Sentiment\***: Dropdown menu set to "Positive".
- Body\***: Text area containing "Example". Below the text area is a small icon and the text "You can insert variables in your macro".
- Level\***: Dropdown menu set to "Tenant".
- Advanced Options**: A section with three sub-sections:
  - Roles**: Dropdown menu set to "All".
  - Sources**: Dropdown menu set to "All".
  - Specialties**: Dropdown menu set to "All".

At the bottom right of the form are "Cancel" and "Save" buttons.

Field	Description
Name	The name of the template as it appears in the review response dropdown.
Modules	Select the modules where this template will be used.
Sentiment	Categorize the template as a reply to a positive review or negative review for sorting purposes. Positive templates only show in the response dropdown for reviews with a 4–5-star rating. Negative templates only show in the dropdown for reviews with no rating or a 1–3-star rating.
Body	The text that populates in the Response window after choosing the template. The text cannot be formatted but it is possible to include variables.
Variables	Variables are placeholders for elements that will be overwritten with the associated data at the time of response. <ul style="list-style-type: none"> <li>• Click the information icon for a list of variables to copy and paste into the body text.</li> <li>• Variable syntax is formatted as: {{variable-name}}. Add a vertical line character (“ ”) and alternate text in the event the associated data for the variable is not available.</li> </ul>

Field	Description
Level	<p>The availability of the macro.</p> <ul style="list-style-type: none"> <li>• To limit to a location, click <b>Location</b> and select the location from an additional dropdown.</li> <li>• To limit to the user profile, select <b>User</b>.</li> <li>• To make the template available to users on the account, click <b>Tenant</b>.</li> </ul>
Advanced Options	<p>Open advanced options to add restrictions on how and where the template can be used.</p> <ul style="list-style-type: none"> <li>• <b>Roles:</b> Select which roles have access to the template.</li> <li>• <b>Sources:</b> Select where the review must originate from to access the template.</li> <li>• <b>Categories:</b> The review must be tagged in a certain category to access the template.</li> </ul>

5. Click **Save**.

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

# **5 | Premium Paid Services**

# Premium Paid Services

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

- Managed Business Listings
- Managed Services for Google
- Managed Social
- Managed Review Response



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

# 6 | Additional Resources

# Additional Resources

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

## Additional User Guides

- [Actions](#)
- [Admin](#)
- [Business Listings](#)
- [Dashboards](#)
- [Engage](#)
- [Inbox](#)
- [Insights](#)
- [Mobile App](#)
- [Publish](#)
- [Rep Connect](#)
- [Reports](#)
- [Reputation Score X](#)
- [ReputationIQ](#)
- [Requests](#)
- [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