Rep Connect

User Guide

Reputation

2025

Table of Contents

1 | Rep Connect Overview

Rep Connect Overview

Use Rep Connect to integrate Reputation data across key business tools and configure and manage these integrations directly from the platform. Rep Connect can accept files via SFTP or query various CRM systems via API connections to send Review or Survey requests via email or SMS and import survey results.

To enable Rep Connect contact Reputation Support or your Reputation representative.

This guide explains the Rep Connect workflow for building and editing integrations. This is a general Rep Connect guide and should be used in tandem with the connector-specific Get Started guides available in the same library where this guide resides.

Within Rep Connect:

- View existing integrations and the execution details.
- Easily configure integrations through a guided user interface.
- Access detailed documentation for each connector.
- Schedule integrations to run and/or execute an on-demand integration.
- Actively monitor integrations via email notifications.
- Perform a test run for each integration before it is enabled.
- Add, edit, and view integration configurations.
- View integration execution details to quickly resolve issues.

Integrations

An integration is when two systems establish a connection to communicate with each other. Integrations are key when discussing business transformation and executing ongoing processes as they allow multiple platforms to work together. Integrations are used to organize technology to stop duplicating efforts, especially when it comes to implementing and acting on business logic. Organizations using integrations become more efficient, productive, and agile.

Connectors

Connectors represent different methods for retrieving data for use in the Reputation platform via Rep Connect. These connectors include Yardi, WelcomeHome, ModMed, Open Dental, CDK, and file-based SFTP. Various connectors are available based on industry and account settings.

> **Note**: New connectors are constantly being developed and added to our platform. If you have a request for a particular integration, let us know through the Reputation platform under **Resources** > **Idea Portal** or contact your Reputation representative (CSM/TAM/IM).

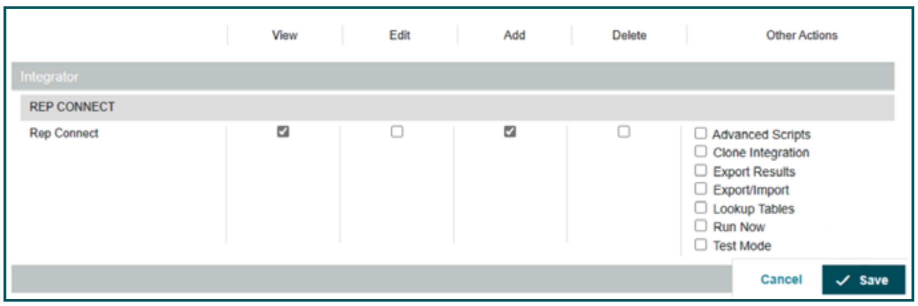
2 | Enable and Configure User Roles

Enable and Configure User Roles

After Rep Connect is enabled, configure permissions for the users managing the integrations.

Note: Only users with permission to edit or add roles can adjust integrator settings.

1. In the upper right corner of the platform, click the gear icon.
2. In the left panel, click **Roles**.
3. Select the role to modify.
4. Click the pencil icon at the top of the page to edit the preferences.
5. Scroll down to the **Integrator** section.



6. Under **Rep Connect**, select the **View** and **Add** check boxes at a minimum.

Role Options	Description
View	Users can see the option for Rep Connect.
Edit	Users can modify existing integrations.
Add	Users can create new integrations.
Delete	Users can delete existing integrations.
Other Actions	Advanced Search: Users can add or edit custom Groovy scripts (advanced users only).
	Clone Integration: Users can make copies of existing integrations.
	Export Results: Users can download or run history data.
	Export/Import: Users can export/import JSON files (advanced users only).
	Lookup Tables: Users can add/edit lookup tables.
	Run Now: Users can run scheduled integrations.
	Test Mode: Users can set integrations into scheduled test run status.

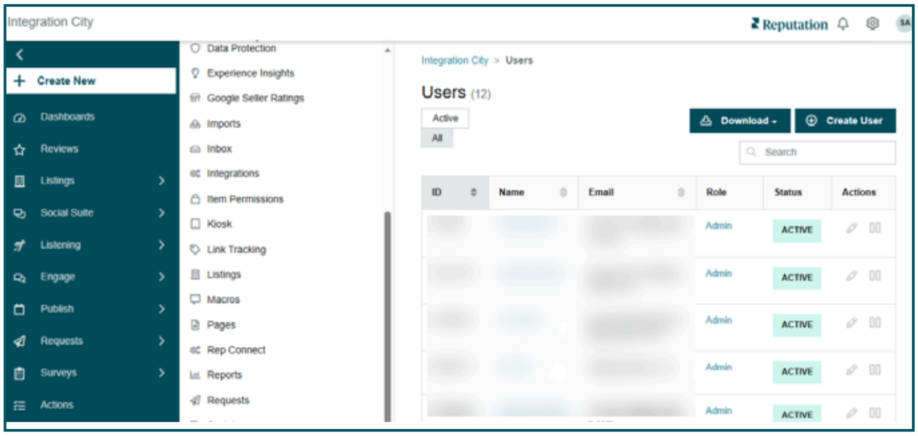
8. Click **Save**.

Note: For the fullest experience, grant users who are creating/modifying integrations the most options. Options for advanced users are generally not needed.

3 | Access Rep Connect

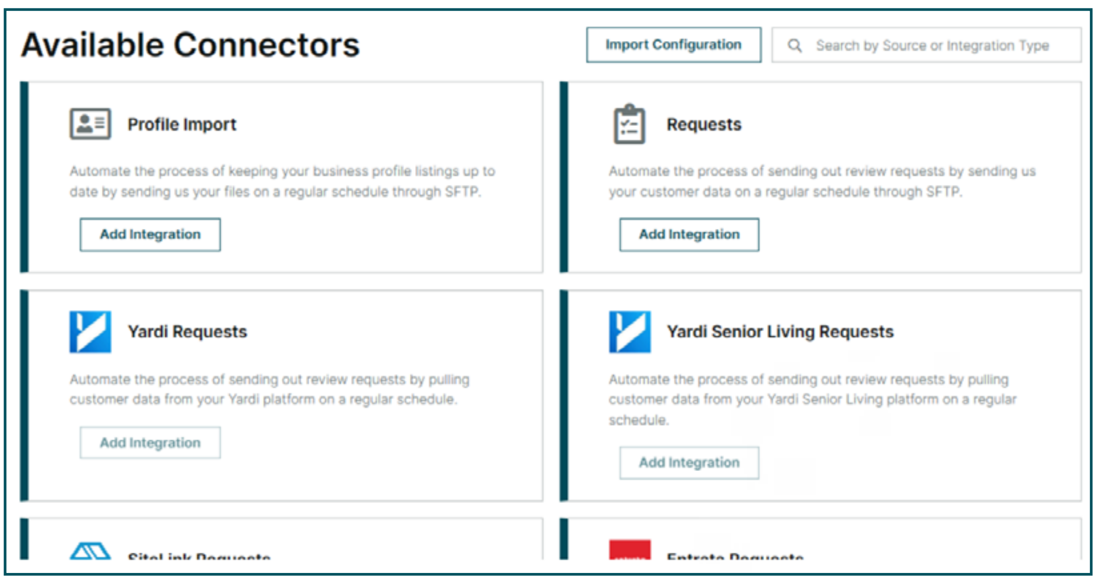
Access Rep Connect

1. In the upper right corner of the platform, click the gear icon to open the Settings.

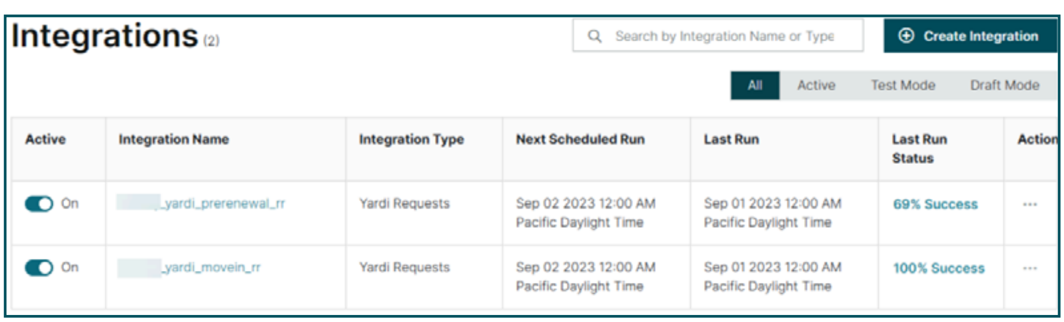


2. Click **Rep Connect** on the left side panel.

- If there are no existing Rep Connect integrations, the **Available Connectors** page displays.



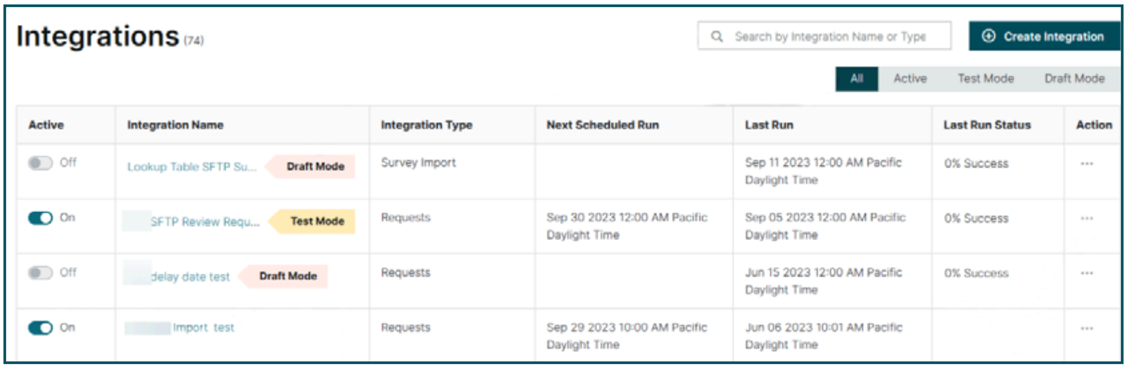
- Existing integrations display in a grid, along with information about each integration:



4 | Integrations Homepage

Integrations Homepage

The integration grid is the homepage for integration management. The grid displays when at least one integration is started.



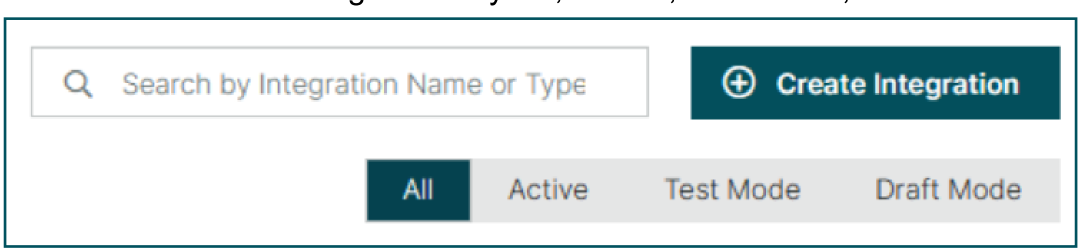
Active, Test, and Draft Modes

Integrations are in one of three modes: **Active**, **Test**, or **Draft**.

- **Active**: The integration is running live (production). When run, requests are sent or data is loaded/updated/exported.
- **Test**: The integration is running tests. When run, data is processed but no actions are taken (no requests sent or data changed). Use this mode to review what happens if the integration is in Active mode.
- **Draft**: The integration is incomplete. Integrations with no modes listed are also in Draft mode.

At the top of the integration grid, the following options are available:

- **Search**: Search for specific integrations by full or partial names.
- **Create Integration**: Click to start the New Integration Wizard.
- **Filters**: Click to filter integrations by **All**, **Active**, **Test Mode**, or **Draft Mode**.



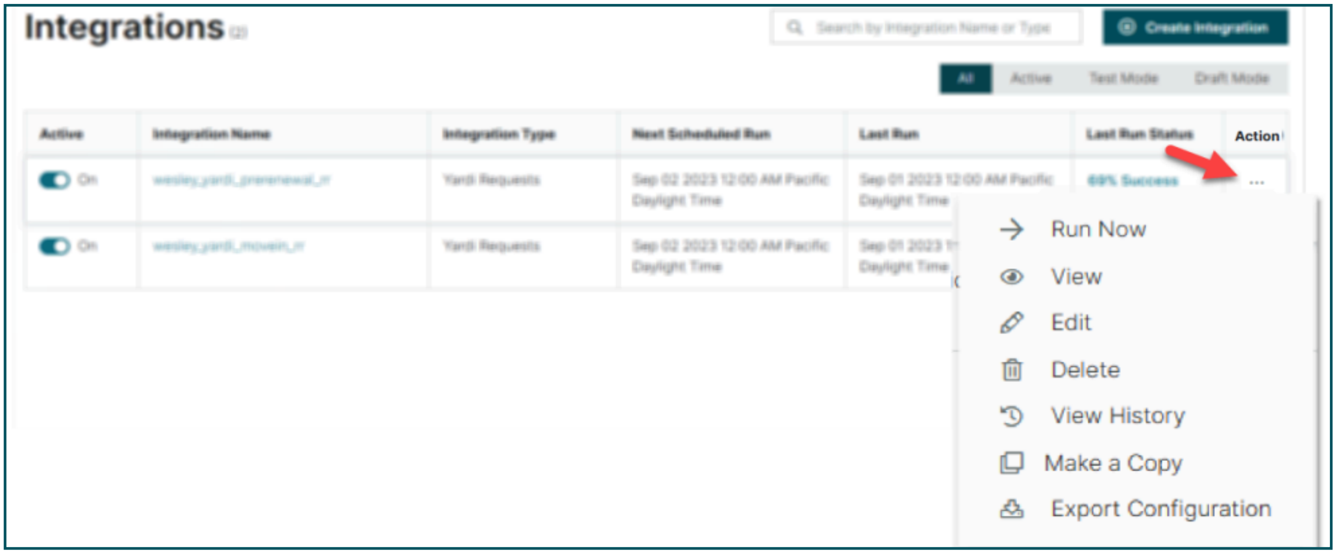
Integrations Grid

The integration grid includes the following columns:

Column	Description
Active	If toggled in the **On** position, or in the **Off** position but clickable, the integration can be scheduled to run in Active or Test mode. • To pause an active integration, click the slider to set the integration to the **Off** position. Click the slider to **On** again to resume scheduled runs. • If the integration is in the **Off** position and is gray and not clickable, it is in Draft mode and has not been activated.
Integration Name	This column displays the integration name and status. • **Active Mode**: No status displays next to the integration name but the **Active** column is clickable or in the **On** position. • **Test Mode**: The integration is scheduled to run in Test mode, which processes input data but does not act upon it (send requests, etc.). Use this mode to test the automation processes and integration configurations. Set integrations to Active mode after they are configured and tested. • **Draft Mode**: This integration is not yet complete and has not been activated. • **No status and the Active column is gray (not clickable)**: This integration was started but is incomplete and not yet saved as a draft.
Integration Type	Displays what the integration does.
Next Scheduled Run	Shows the date, time, and time zone of the integration's next scheduled run. If empty, the integration does not have an active schedule.
Last Run	Shows the date, time, and timezone of the integration's last run. If empty, the integration was not run.
Last Run Status	Shows the percent of successful data rows. • If clickable, click through to see the last run's results. • If not clickable or empty, there is no recent data to view, or the integration has only been run in Test mode.
Action	Click the ellipses to access additional options for the integration. Options displayed are based on the user's role. For more information, see Actions on page 14.

Additional Actions

Click the ellipses on a row to access the additional options menu for the integration. The available actions are based on role permissions.



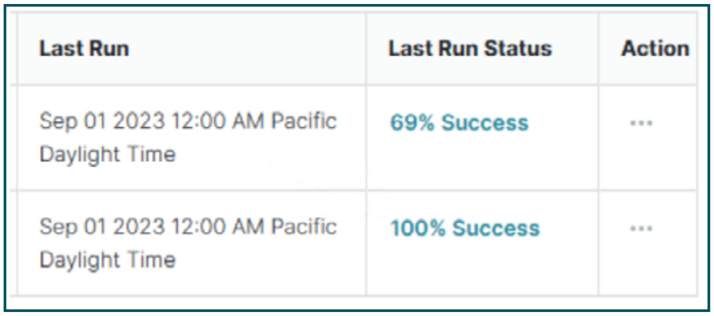
Action	Description
Run Now	Executes integrations in **Active** or **Test** modes without waiting for the next scheduled run time. Click **Confirm** to complete the action.
View	Displays the integration in **View** mode. The integration options can be viewed but not edited. Clicking the integration name also activates **View** mode.
Edit	Displays the integration in **Edit** mode. Integration options can be viewed and edited.
Delete	Deletes the integration. This action cannot be undone and all run history is deleted. Data previously imported into the Reputation platform is not deleted.
View History	Displays a complete run history. For more information, see View Integration History on page 15.
Make a Copy	Clones the integration. This is useful for testing purposes or if additional similar integrations are required. Copy the integration and make the desired edits in the copy rather than creating new integrations from scratch. Enter a unique name for the integration copy in the **Name** box and click **Yes** to complete the action.
Export Configuration	Exports the integration settings in JSON format. This is useful for copying an integration to/from a QA/test environment. The export file is available in the browser's download section.

View Integration History

There are two methods to view the integration history: view the most recently run data or view all history.

Method One: View the most recently run data.

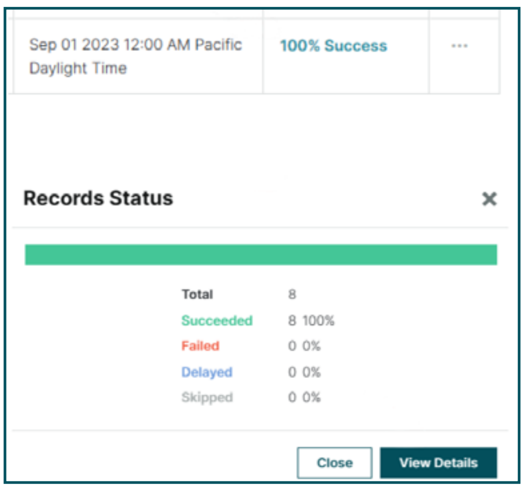
1. Click the **% Success** link in the **Last Run Status** column.

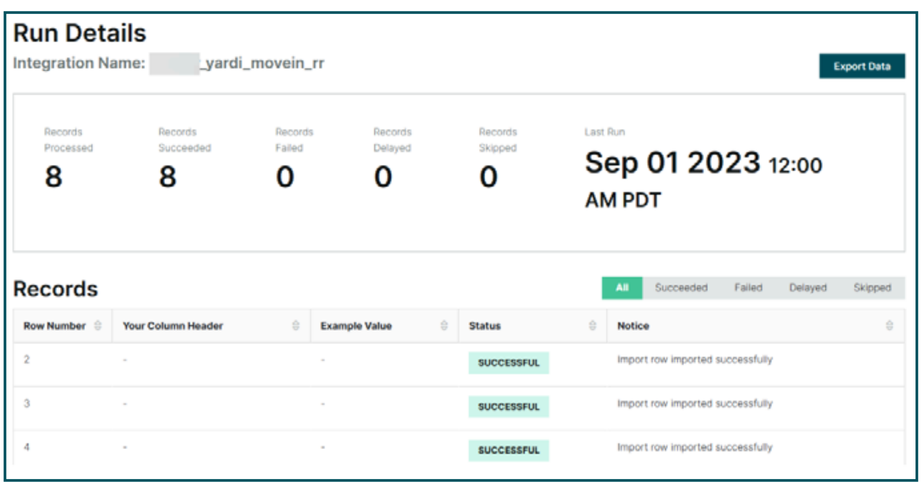


Last Run	Last Run Status	Action
Sep 01 2023 12:00 AM Pacific Daylight Time	69% Success	...
Sep 01 2023 12:00 AM Pacific Daylight Time	100% Success	...

- If the link is gray (not clickable) or blank, use Method Two.

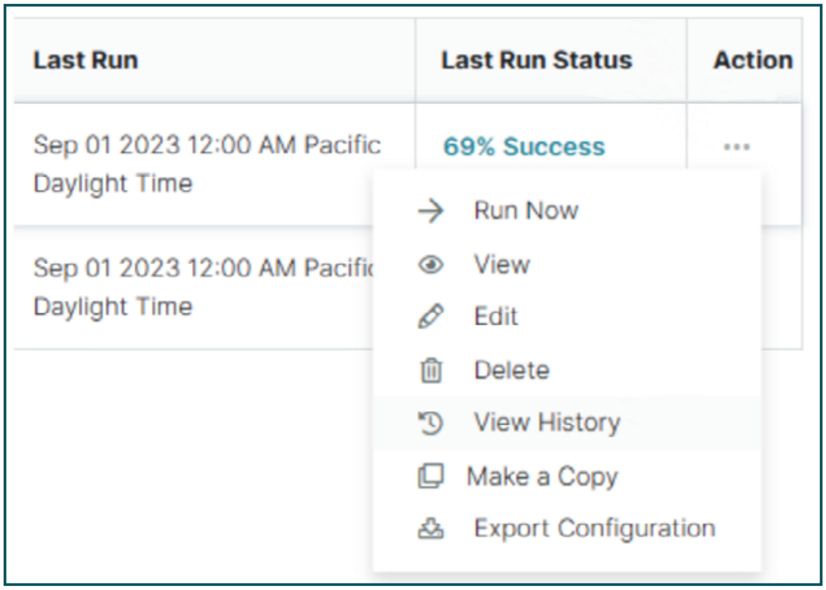
2. Click **Close** to return to the grid or **View Details** to proceed to the **Run Details** screen.





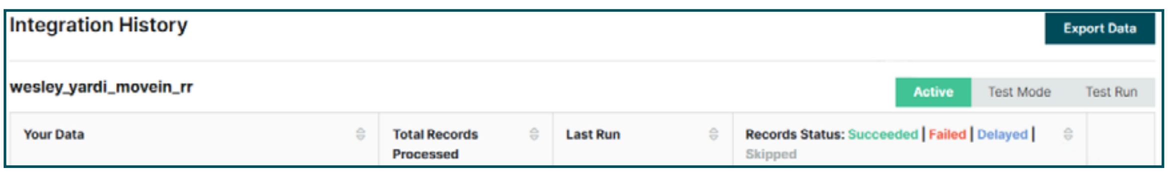
Method Two: View all history.

1. Click the ellipses in the **Action** column.
2. Select **View History**.

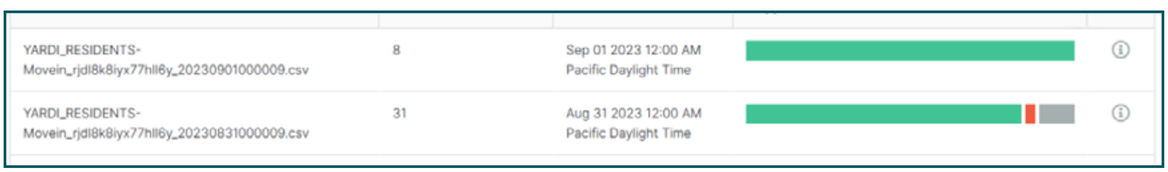


- The **Integration History** screen displays.

3. Use the top line filters to sort for **Active**, **Test Mode**, and **Test Run**.

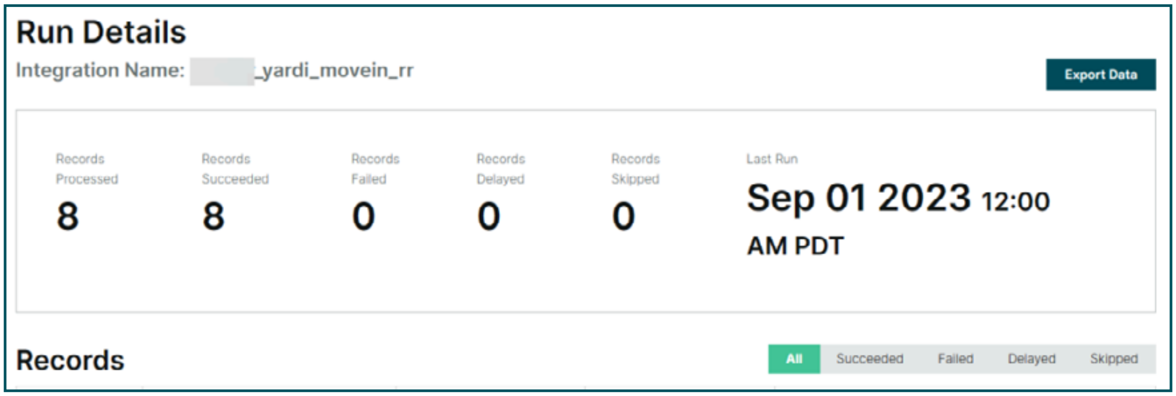


4. Click the information icon to view the **Run Details** screen.



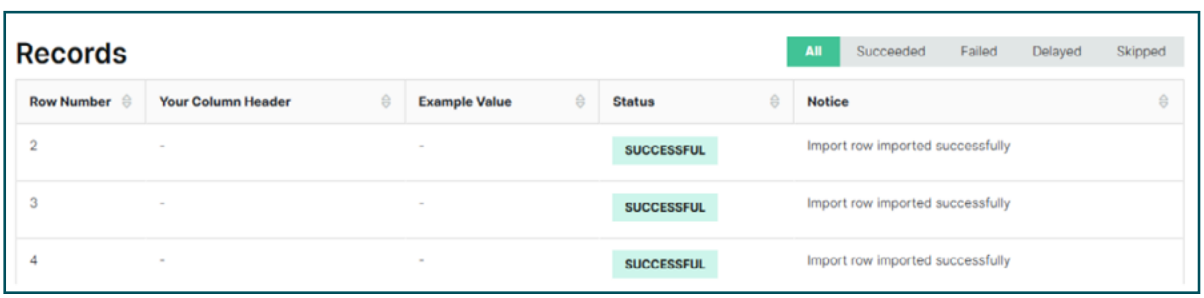
Run Details

At the top of the **Run Details** grid, the following is available:



- **Export Data**: See Export Run History on page 18 for more information.
- **Filters**: Click to filter the Status.
  - **All**: All result types.
  - **Succeeded**: Only display successful rows. Successful rows triggered an action such as sending a review request or importing data.
  - **Failed**: Only display failed rows. Failed rows could not trigger an action because a data element was incorrect or missing. Review the results to help troubleshoot.
  - **Delayed**: Only display delayed rows. Records delayed are usually due to using the delay filter.
  - **Skipped**: Only display skipped rows. Records skipped are usually due to using the skip filter.

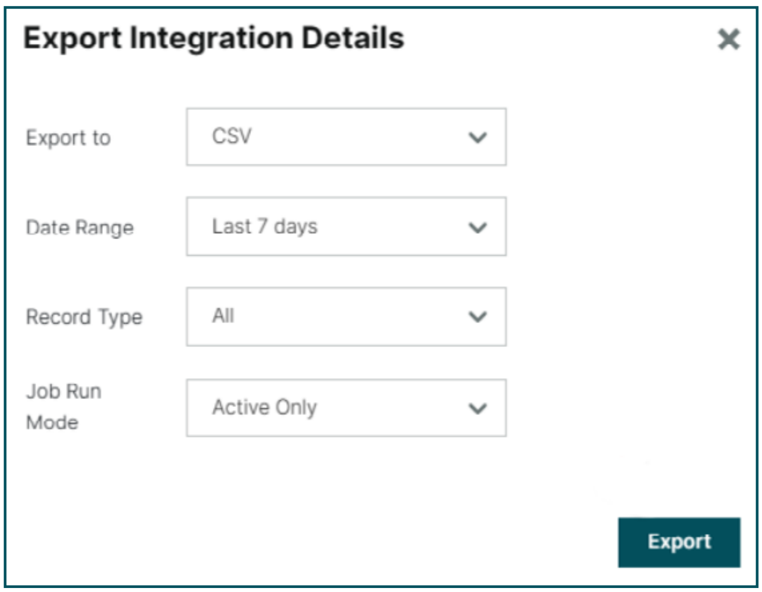
The **Run Details** grid has the following columns:



- **Row Number**: The data row number in the source data file.
- **Your Column Header**: The column headers in the source data file, if any.
- **Example Value**: The value from the field in the specified row.
- **Status**: Row status. See the list of Filters above for more information about Status.
- **Notice**: Information back from the processor about the record.

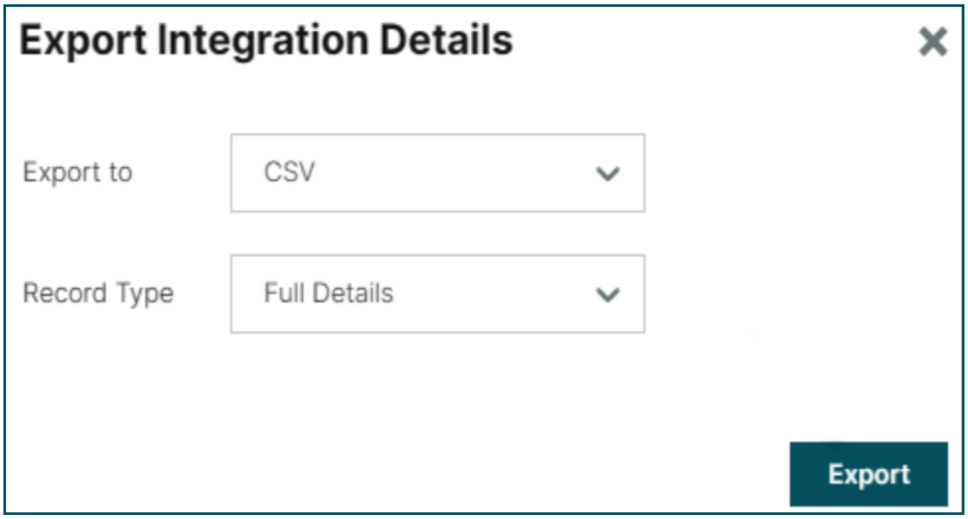
Export Run History

1. On either the **Integration History** or **Run Details** screen, click **Export Data**.
2. The **Integration History** screen export returns the integration run summary and has the following options:
   - **Export to**: CSV, Excel (XLSX) files.
   - **Date Range**: Last 7, 14, or 30 days.
   - **Record Type**: All, Failed Records, or Succeeded Records.
   - **Job Run Mode**: Active, Test, or Test Run.
3. Click **Export** to download the file.



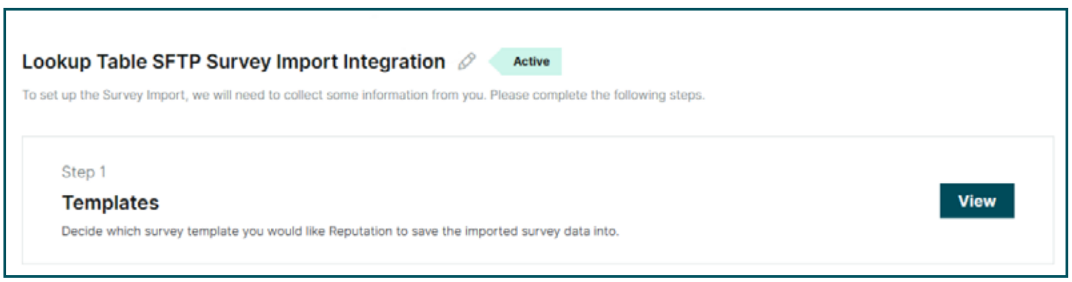
4. The **Run Details** screen export returns the details for the selected run and has the following options:
   - **Export to**: CSV, Excel (XLSX) files.
   - **Record Type**:
     - **Full Details**: Includes original source data, transformed data, and status/errors for each row.
     - **Your Data**: The original file/source data.

5. Click **Export** to download the file.



Edit an Integration

1. From the Integrations Grid, click the ellipses and select **Edit**.



   a. Alternatively, click the integration name to open the integration in **View mode**.
      - The **Integration Wizard** displays.

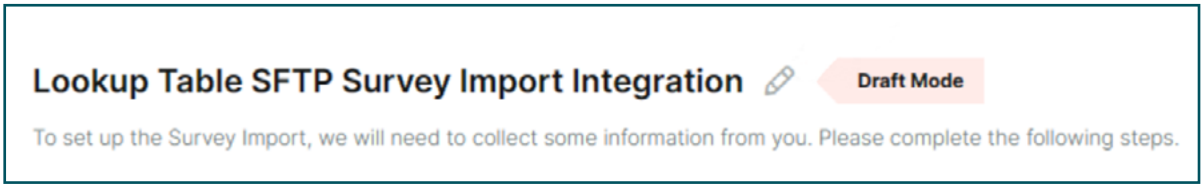
> **Note**: If an integration is in View mode, enter Edit mode by clicking the pencil icon next to the integration name. If the integration is already in Edit mode, clicking the pencil icon opens the rename integration box.

2. Click the **Edit**, **Start**, or **Review** button on any step to access the step.

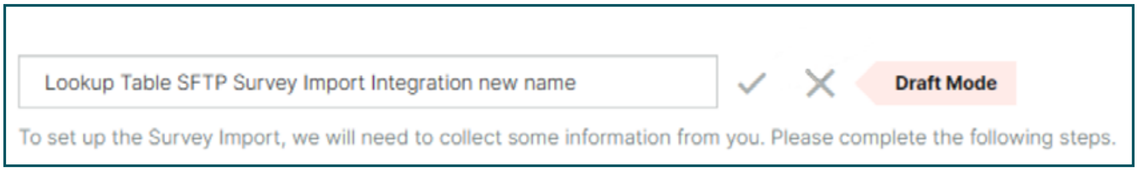
- **Edit**: The step has been completed and can be edited.
  - If the button displays as **View**, the integration is in **View** mode.
- **Start**: The step has been skipped or not completed and can be started.
- **Review**: The final step of the flow, **Review** and **Submit**.
  - If a button is gray, a required previous step has not been completed. Review and complete the previous steps.

Rename an Integration

1. With an integration in **Edit** mode, click the pencil icon next to the integration name to open the rename integration box.



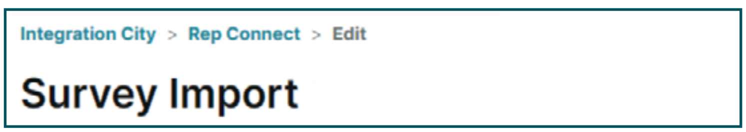
2. Type in the new name.



3. Click the checkmark to save the new name, or **X** to cancel.

Note: If in an integration is in View mode, enter Edit mode by clicking the pencil icon next to the integration name, then click the pencil icon again to activate the rename box.

- To return to the **Integrations Grid**, click the **Rep Connect** link at the top of the page at any time.



4. To save the changes, click **Finish Step** on the last page of each step.

Navigate within the Steps

Most step pages have basic navigation buttons at the bottom of the screen:

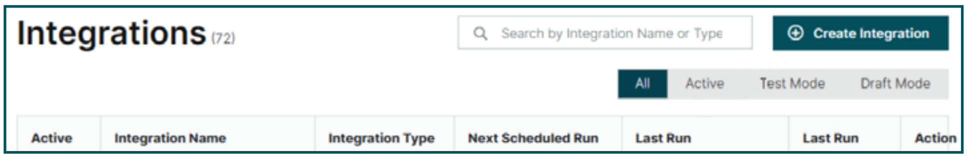
- **Back**: Returns to the previous page.
- **Save as Draft**: Saves the work as a draft and returns to the integration homepage.
- **Continue**: Move to the next page.
- **Skip Step**: Returns to the wizard without saving the selections.
- **Finish Step**: On the last page of a step, save the selections and return to the wizard. This also marks the step complete and makes the next step in the wizard available, if any.

5 | Build a New Integration

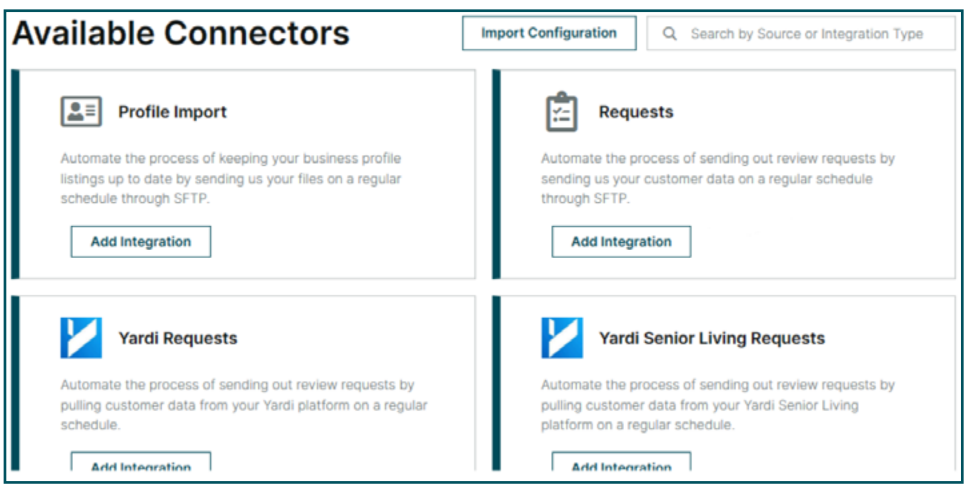
Build a New Integration

To build an integration in Rep Connect, select a connector and complete each step in the integration wizard.

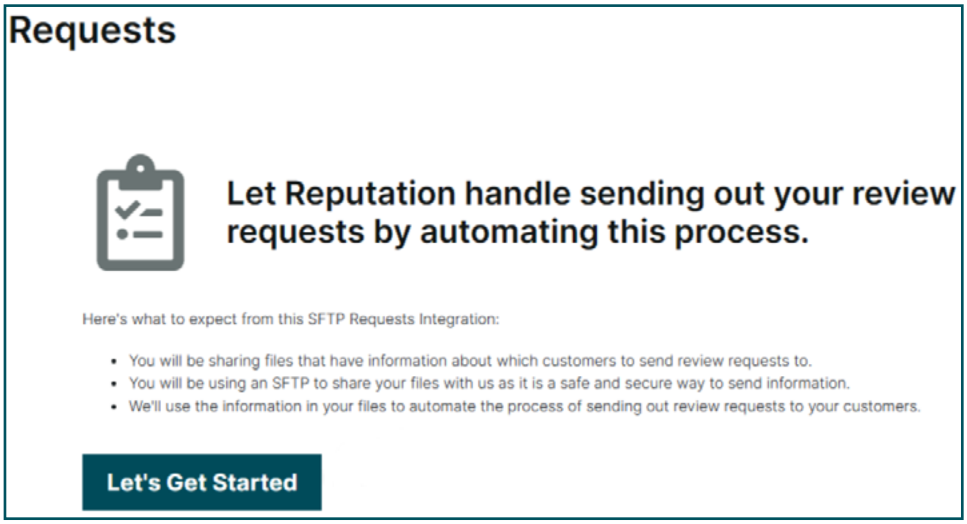
1. Open Rep Connect. See Access Rep Connect on page 10 for more information.
    - If there are no existing Rep Connect integrations, the **Available Connectors** page displays tiles for each connector.
    - If there are existing integrations, the integration homepage displays.
2. Click **Create Integration**.



3. On the **Available Connectors** page, locate the desired integration's tile and click **Add Integration** to open the integration wizard.
    - The integration wizard provides a step-by-step setup for each integration type. This is the main page for building and editing integrations.
    - If the desired connector's Add Integration button is gray (not clickable), contact your Reputation representative or see Contact Support on page 71.



4. Click **Let's Get Started** to move to the next page.



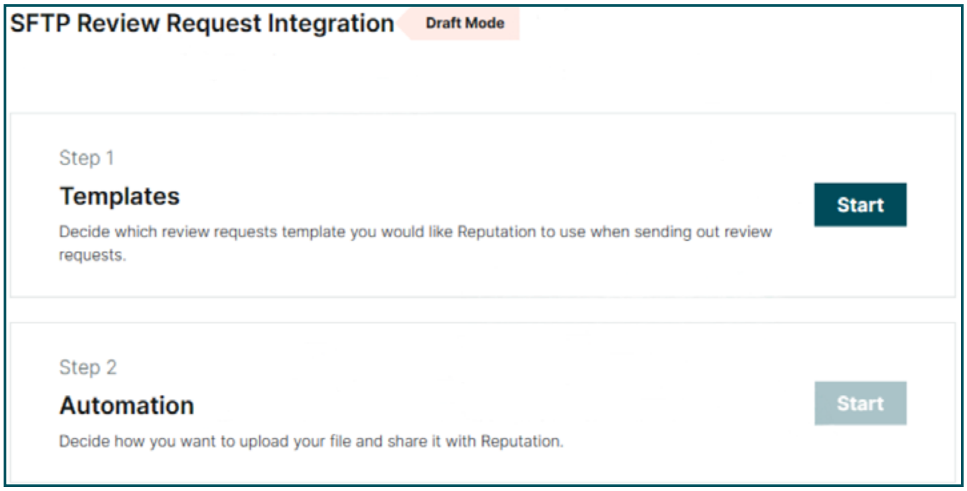
- The integration name page displays.

5. Leave the name as-is, or enter a new one in the **Name** field.

- Integration names must be unique per tenant.
- It is possible to change the integration name later.

6. Click **Next** to move into the main wizard page.

7. Click **Start** for Step 1 to continue through the wizard.



- For integrations that require templates, such as review request integrations, the templates are step one. Other types of integrations start with Automation.
- Each step must be completed in the following order.
  - Templates
  - Automation
  - Mapping
  - Exceptions and Delays
  - Schedule
  - Notifications
  - Test Run
  - Review and Submit
- If the **Start** button of the next step cannot be clicked, review and complete the previous step.

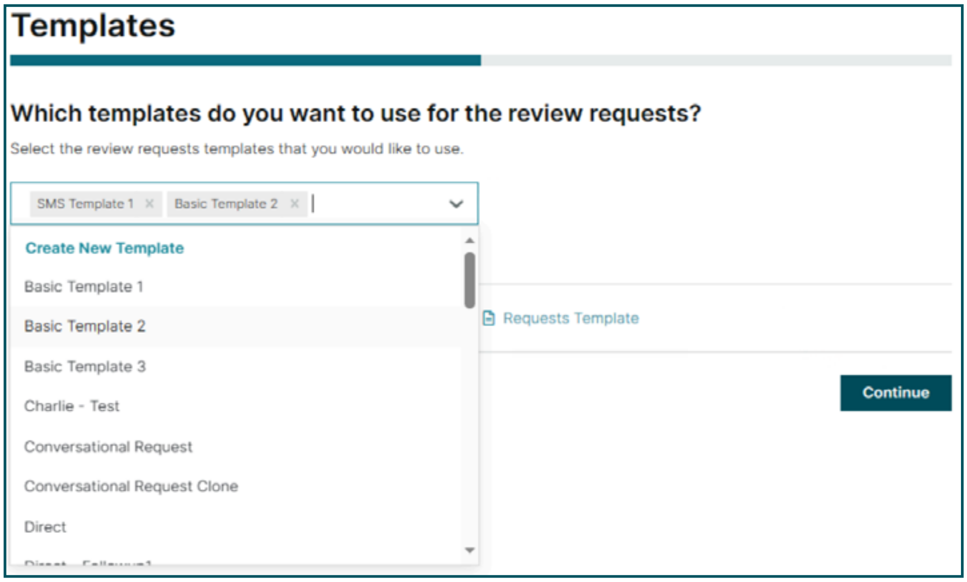
Step: Templates

If the integration requires templates, the **Templates** step is available. This step tells Rep Connect which templates the integration needs.

1. Click **Start**.
2. Click the down arrow to the right of the **Search** box.
   - A list of all the templates for the tenant displays.
3. Click on one or more template names to be used in this integration.

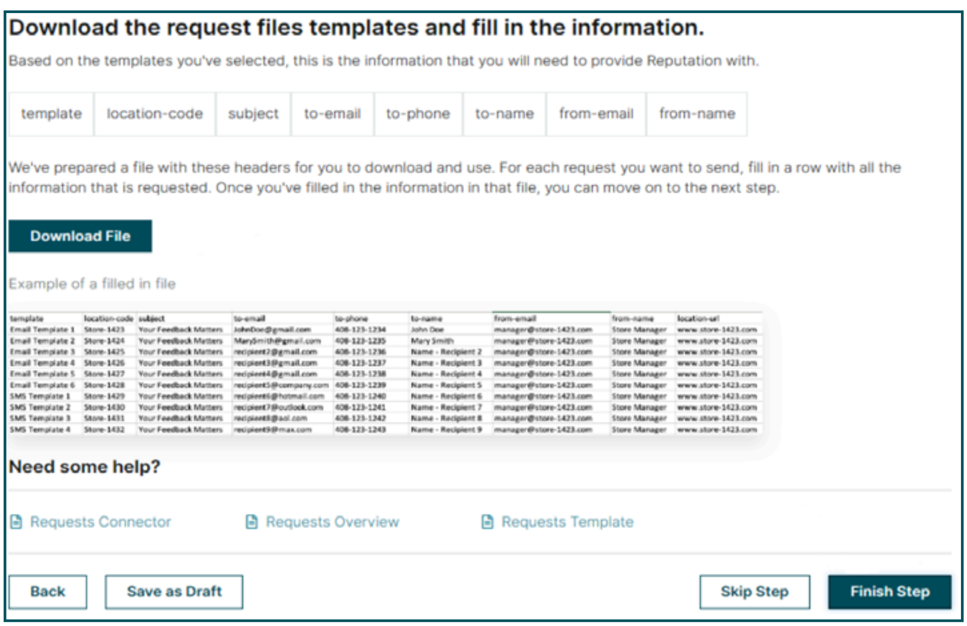
- If a template is selected in error, click the **x** next to the name to remove it from the selection.
- If there are no desired templates, click the **Create New Template** link to open the Template design page in a new tab. It is recommended to create all templates used in the integration before the integration is built.

4. When at least one template is selected, click **Continue** to move to the final page of the Templates step.

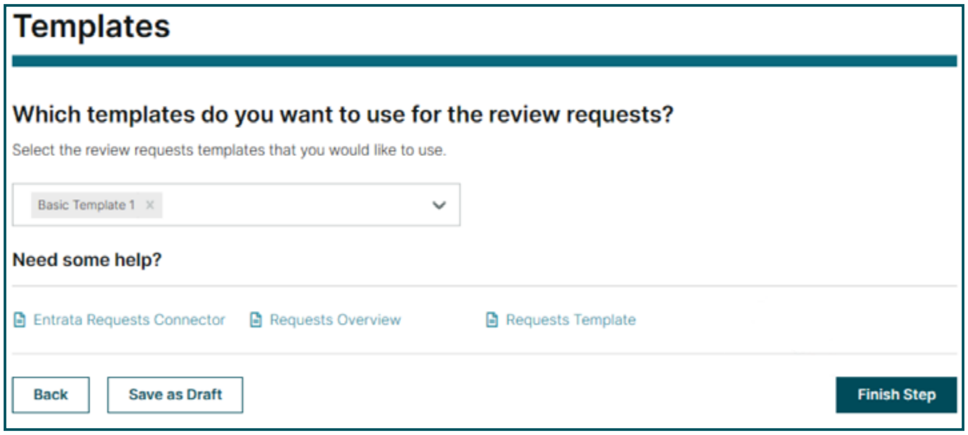


5. (Optional) Click **Download File** to export a generic template containing the required fields. Skip this option if it is not needed.

   - If the integration is API-based, there is no option to download a sample file.



6. Click **Finish Step** to save the selections and return to the wizard.



Step: Automation

This step shows Rep Connect how to obtain data (from files or via API connections) or where to deposit data files.

Automation is either Step 1 or Step 2, depending on the connector.

1. Click **Start**.

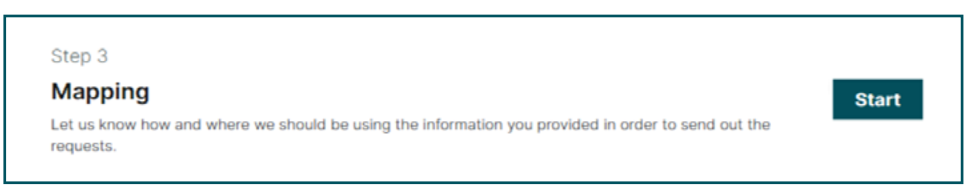
2. Follow the instructions in the specific Get Started guide for the connector to complete the **Automation** step.

Step: Mapping

This step shows Rep Connect how to translate the data fields into the Reputation platform fields. The **Mapping** step also transforms the data, using functions such as capitalize, concatenate, and find-and-replace.

Mapping is either Step 2 or Step 3, depending on the connector.

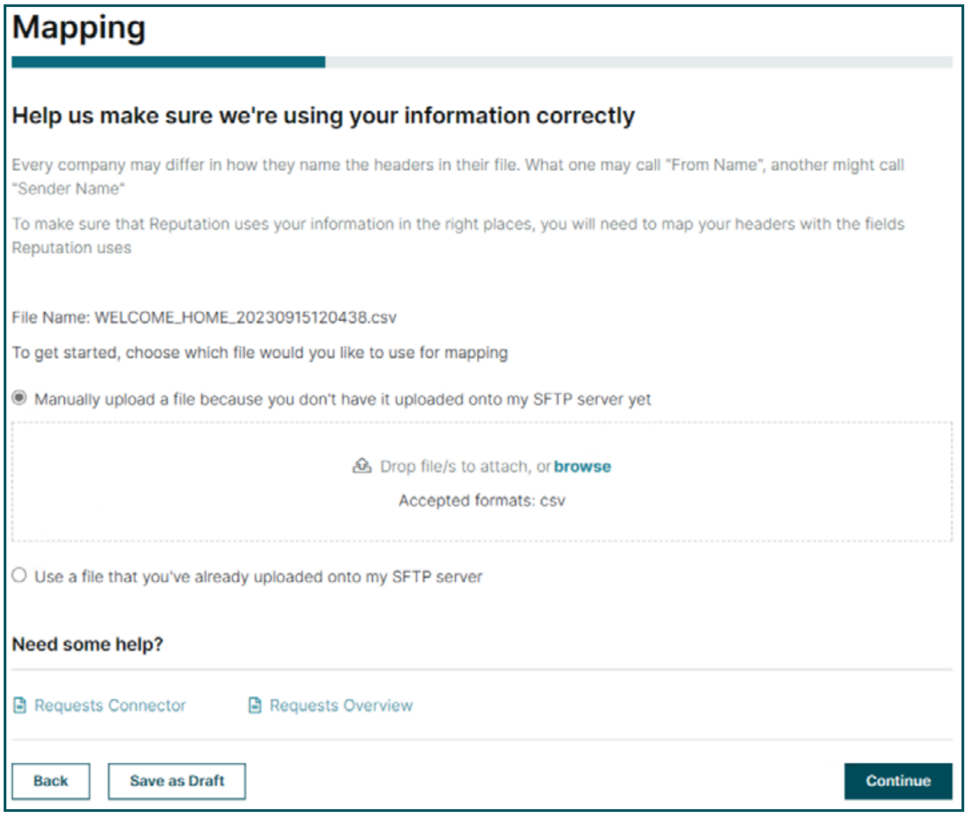
1. Click **Start**.



- If the integration is file-based, file selection is the first screen of the **Mapping** step.
- If the integration is a data export, the mapping screen is the first page of the mapping step because the data is coming from the Reputation platform, not a file.

2. (Optional) For file-based integration, choose one of the following options:

    - **Option 1**: To upload a sample file, either drag-and-drop the file into the dashed area on screen, or click the **Browse** link to choose a file. This uploads the file into the SFTP server folder defined in the **Automation** step.
    - **Option 2**: If the file has already been uploaded to the SFTP server folder as defined in the **Automation** step, choose **Use a file that you've already uploaded onto many SFTP server**.



3. When a file is in place, click **Continue**.

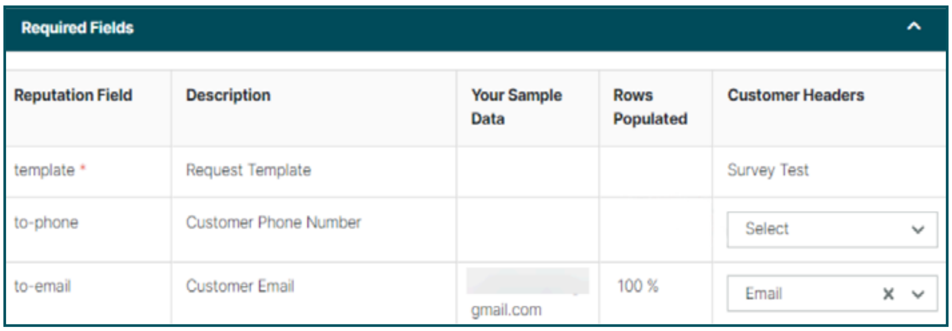
    - The main mapping screen displays.

Define the Data Mapping

Use the main mapping screen to define how the data maps (translates) to Reputation fields.

The main mapping screen is divided into three sections, depending on the connector used. Click anywhere on the section header to expand or collapse the section.

- **Required Fields**: Fields that are generally required for the connector type used. Fields marked with an asterisk are mandatory.



Required Fields

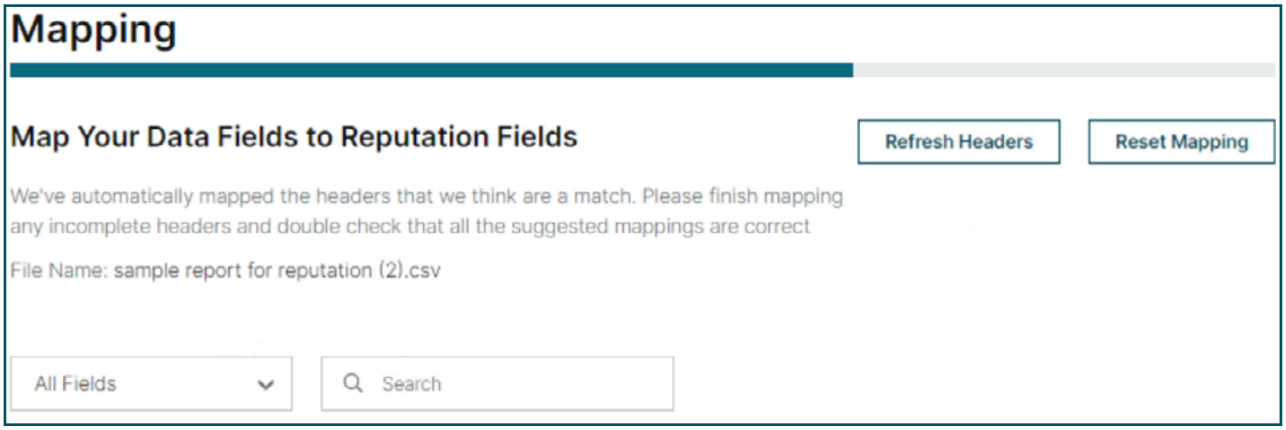
Reputation Field	Description	Your Sample Data	Rows Populated	Customer Headers
template *	Request Template			Survey Test
to-phone	Customer Phone Number			Select
to-email	Customer Email	gmail.com	100 %	Email

  - **Example**: For request integrations, template and location-code are required fields and marked with asterisks. One or both of the to-phone and to-email fields are needed for the integration, so they are in the Required Fields section but not marked with asterisks.

- **Recommended Fields**: Other fields available for the connector. The template variables display as lowercase in this section.
  - **Example**: Template variable {{First_Name}} displays on this page as first_name (all lowercase and no brackets).

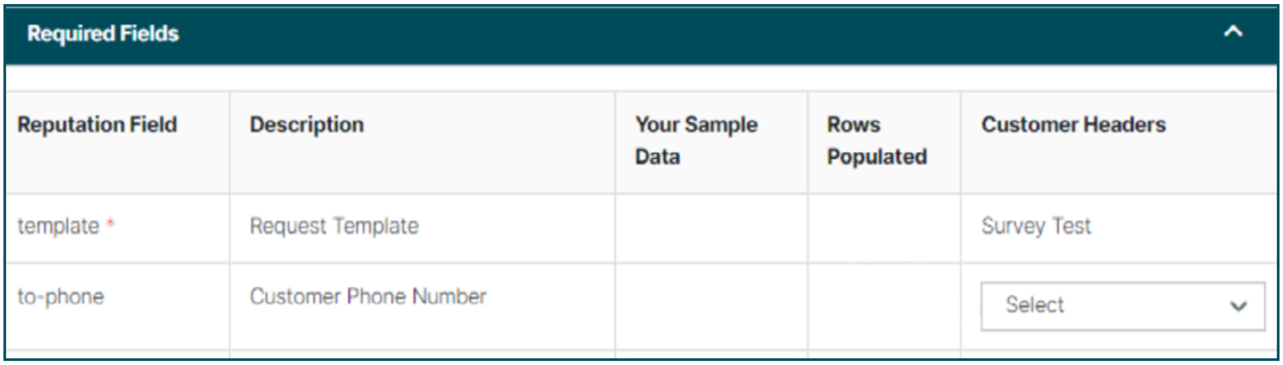
- **Custom Fields**: Custom metadata variables can be mapped in this section.

Use the options at the top of the main mapping screen to organize each section:



Option	Description
Filter	Defaults to **All Fields**. Additional choices filter **Mapped Fields** and **Unmapped Fields**.
Search	Type a value in the **Search** box to display only field names that contain that value.
Reset Mapping	Remove all the header selections. This cannot be undone. Use this when starting from scratch is easier than making changes, such as when an existing integration has been copied and the mapping is not compatible.
Refresh Headers	Upload a new file with additional or different headers to update the drop-down list of headers. This option opens the first mapping page to upload a new file.

The mapping grid has the following columns:



Column	Description
Reputation Field	Reputation platform fields.
Description	Description of the Reputation Fields.
Your Sample Data	When a field is mapped, this column displays a sample from the file/source.
Row Populated	A percentage of all rows in the file/source populated with a selected field.
Customer Headers	The field from the data source that corresponds to the Reputation field. • If Rep Connect can auto-match fields, the matching fields are displayed in the drop-down on the right. If not, the drop-down options show as **Select**.

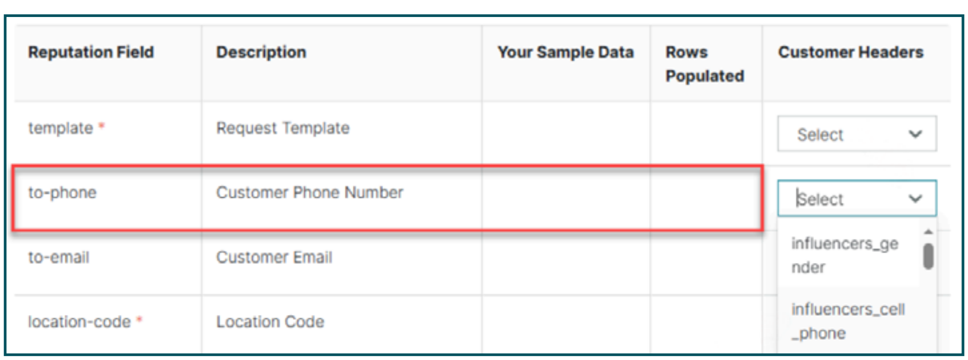
Map the Fields

To map a field,

1. Click the drop-down box in the corresponding row of the **Customer Headers** column.
   - A list of all available fields from the source/file displays.
2. Click one of the fields to map it.

   Required Field Example:

   The **to-phone** field is mapped to the source/file field **influencers_cell_phone**.



When a source field is mapped, the sample data and percentage displays.

to-phone	Customer Phone Number	1540	58 %	influenc..

A completed **Required Fields** section looks like this:

Reputation Field	Description	Your Sample Data	Rows Populated	Customer Headers
template *	Request Template			Select
to-phone	Customer Phone Number	1540	58 %	influencers_..
to-email	Customer Email	@gmail.com	78 %	influencers_..
location-code *	Location Code	12	100 %	community_ic
to-name *	Customer Name	Kim	88 %	influencers_..

The **template** field is not mapped to a source/file field in this example. The template can be defined using logic or a static value on the following page.

Expand the **Recommended Fields** section and complete any necessary mappings with the same steps.

Required Fields

Recommended Fields

Reputation Field	Description	Your Sample Data	Rows Populated	Customer Headers
request.origin	Request Origin			Select
from-name	Customer Name			Select

Map Custom Fields

If necessary, expand the **Custom Fields** section. If metadata fields were not mapped in the preceding section, map them here.

Method One:

1. Click **Add New Mapping**.
2. Manually type the variable name in the **Reputation Field** column and select a source field in the **Customer Headers** column.

Custom Fields

Forgot to include a column header? Add New Mapping ☐ Add all unmapped Column Headers

Reputation Field	Description	Your Sample Data	Rows Populated	Customer Headers
*	Custom Field			Select

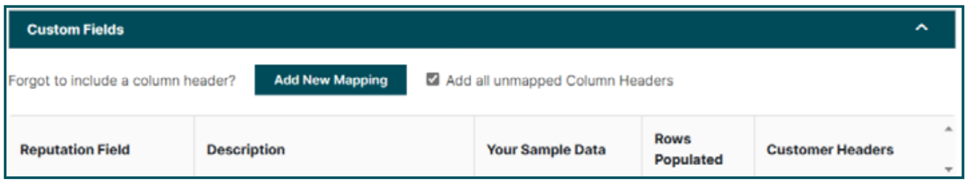
- Metadata fields are case and space sensitive and must be entered exactly as they appear in the platform.

3. Click **Add New Mapping** again to add additional fields if necessary.

Note: To remove a field, click the X to the right of the field name.

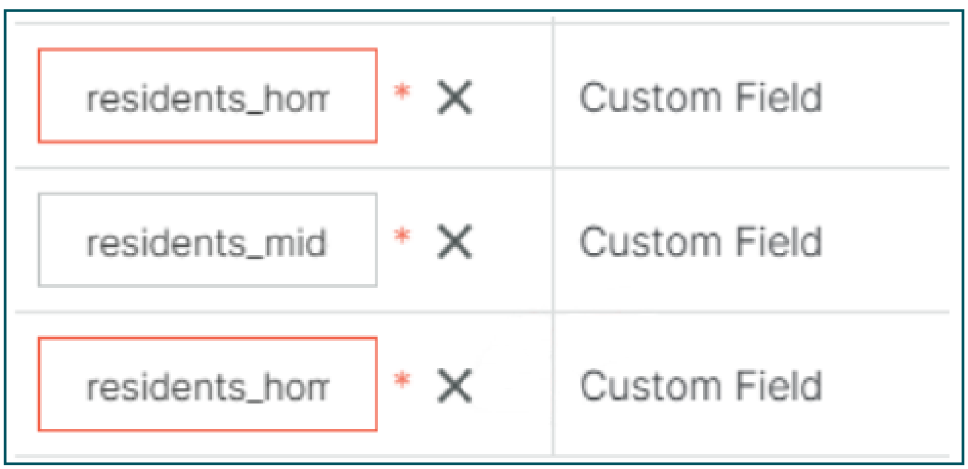
Method Two:

1. Click the **Add all unmapped Column Headers** option.
    - This feature automatically populates all fields that exist in the source file but have not yet been mapped.

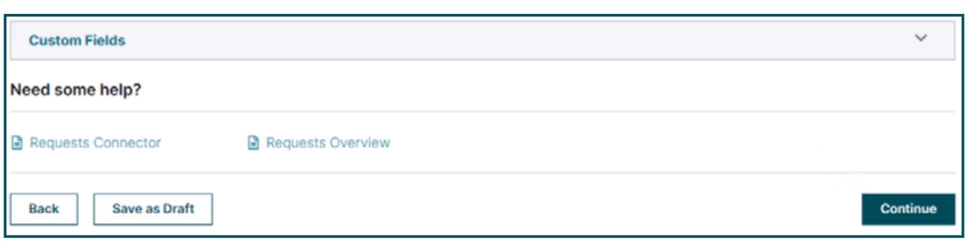


2. Make necessary adjustments in the **Reputation Field** column to ensure the metadata is an exact match.

Note: Duplicate fields are not allowed. If the metadata entered has a red border and the **Continue** button is gray, scroll up to find the duplicated field, which will also have a red border and remove one of the duplicate fields. The duplicate field can be in the **Recommended** or **Required Fields** sections.



3. When all fields are mapped, click **Continue**.

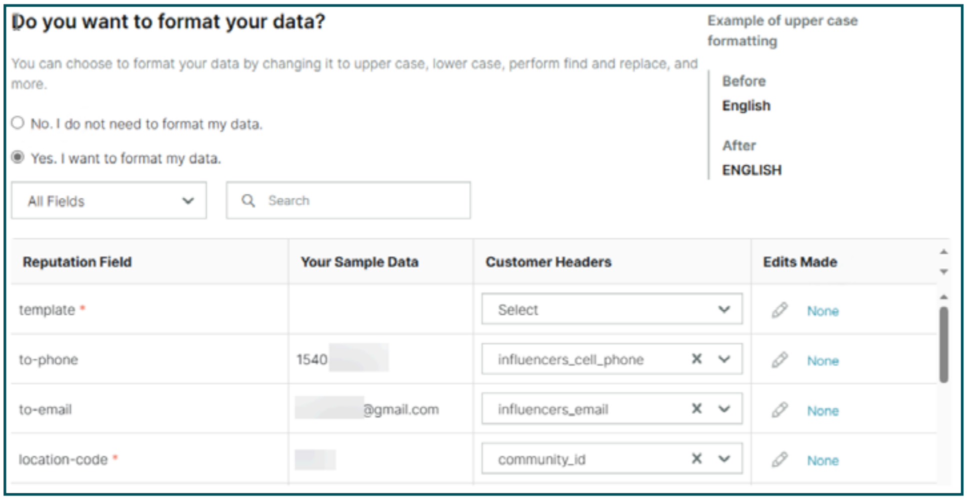


Data Formatting (Transformations)

The Data Formatting page has options to format or transform data. If all source data will be used exactly as-is, click **Finish Step** to save the selections and return to the wizard.

> **Note**: If the Finish Step button is gray, some required fields have not been mapped. Expand the formatting section to review all fields.

1. If data formatting is required, check the **Yes. I want to format my data** option to expand the formatting section.



   - All fields display along with their mapped source fields.

2. Modify existing fields, or click the **Back** button to return to the previous page to add additional custom fields.

The **Mapping** panel has the following options:

- **Use Data From**: Select where the source data comes from.
  - **Your Column Header**: The mapped source field, if any.
  - **Static Value**: Specify a static text value for a Reputation Field to populate regardless of the value present in your data.
  - **Concatenate**: Combine two or more columns into new, combined values.
    - Available delimiters: None, Space, Comma, Semicolon, Pipe
  - **Dynamic Mapping**: Set up logic to choose which columns are used.

- **Close**: Closes the Mapping panel without saving changes.
- **Reset**: Resets the selections.
- **Save**: Saves the selections.
  - If **Save** is gray, the format selections are not complete.
  - Click **Save** then **Close** to save the selections and close the panel.

> **Note**: The **Advanced** tab allows adding Groovy scripting to handle cases too complex for the standard formatting UI. This is for advanced users only.

Formatting/Data Transformation Options

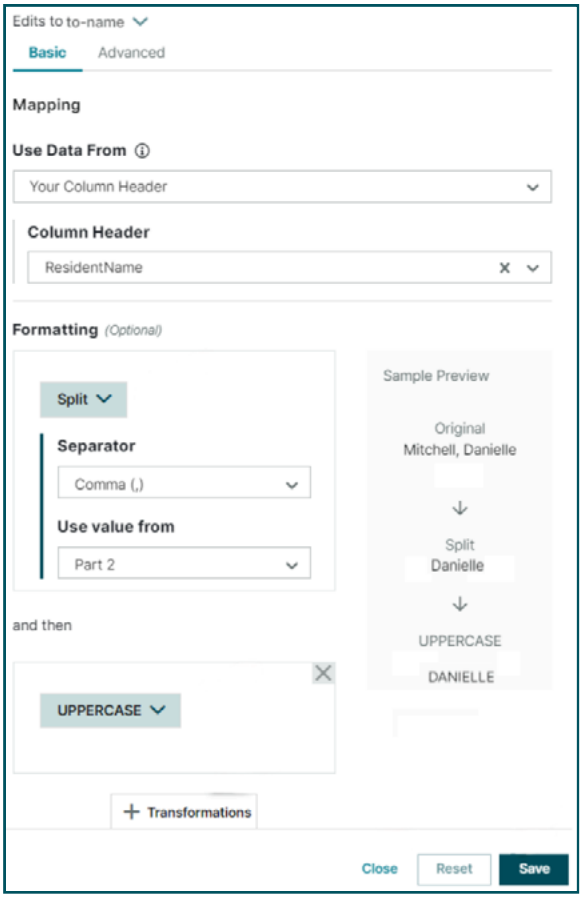
To format data,

1. Click the pencil icon in the **Edits Made** column to open the **Use Data From Panel** panel.
2. Click **+Transformations** to open the **Formatting** panel.
3. Under **Use Data From**, select an option from the drop-down.
   - See Formatting Use Cases on page 36 for more information about each option.

Transformation Option	Description
Static Value	Specify a static text value for a Reputation Field to populate regardless of the value present in the data.
Uppercase/Lowercase/Title Case	• Convert any text in the data to UPPERCASE characters. • Convert any text in the data to lowercase characters. • Convert any text in the data to Title Case characters.
Find & Replace	Find a certain value in any column and replace it.
Concatenate	Combine multiple text values together with a choice of separator.
Format US Zip Code	Format the value as a US ZIP code.
Format URL	Change any invalid formatted URLs to a valid formatting.
Lookup	Add a mapping table to use it as lookup for a bulk find and replace.
Split	Split any text value from the data. Save partial text data mapped to any Reputation Field.
Dynamic Template	Available only when formatting the template field. Add rules to decide which request templates should be used by Rep Connect to send the review requests.
Dynamic Mapping	Add rules to decide which fields should be used for mapping.

4. Choose the transformations from the drop-down menu.

5. Click **+Transformations** again to apply additional transformations.
    - Up to 10 transformations can be applied to data elements that allow data transformations. Sample transformed data is displayed on the right.
    - Example:
        - Data comes from the **ResidentName** column of the source data.
        - Transformation 1: The data is **Split** by comma and the second portion is used.
        - Transformation 2: The resulting data is in **UPPPERCASE**.



6. When the selections are complete, click **Save**, then **Close**.

Formatting Use Cases

Static Value Example

In a Review Request integration, all the requests are sent from the same name “Business Manager,” but the data does not contain a column that provides this value to be mapped to the Reputation Field **from-name**.

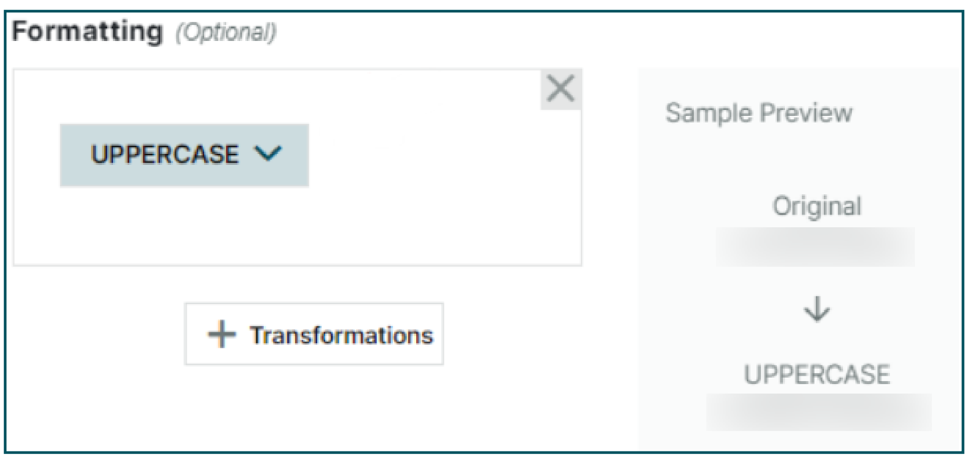
1. Under **Use Data From**, choose **Static Value** to define this mapping.
   - It is not necessary to map any of the columns to the Reputation field.

Uppercase/Lowercase/Title Example

A Review Request integration with a “location-code” in either title case or uppercase is stored on the Reputation platform as all lowercase.

Use the **Lowercase** formatting function to convert the “location-code” value from the file into all lowercase characters. The same function applies to **Uppercase** and **Title Case**.

1. From the formatting panel, select **lowercase**, **UPPERCASE**, or **Title Case** from the drop-down menu.



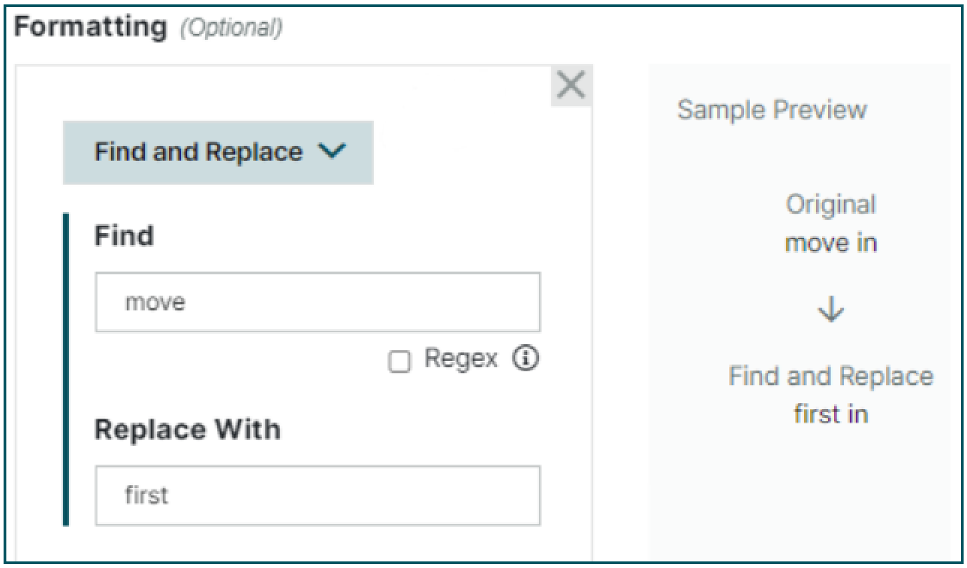
Find & Replace Example

A Profile Import integration to save a certain category as **Physician Family Medical Practice**, but the data contains the **Categories** column where the value is **Physical Family Medicine**.

Map the Reputation field categories to the formatted value of the data in the columns.

1. From the formatting panel, select **Find & Replace** from the drop-down.

2. In the **Find** box, type the term to find.
3. In the **Replace With** box, type a term to replace the term in the **Find** box.
    - The resulting value is displayed to review using a sample value from the selected column.



Note: The Regex checkbox sets up regular expressions for data matching. This is for advanced users only.

Concatenate Example

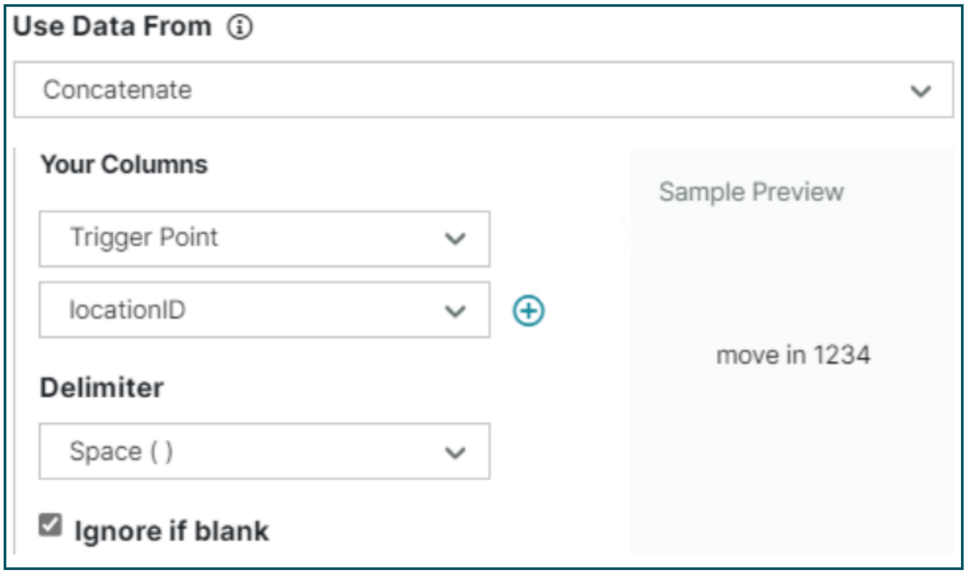
A Review Request integration to list the full customer name in the requests, but the data contains two distinct columns for **First Name** and **Last Name**.

Map the Reputation field **to-name** to a concatenation of the values from both the **First Name** and **Last Name** fields.

To format this:

1. Under **Mapping**, select **Concatenate** from the drop-down.
2. Under **Your Columns**, select the columns to combine.
    a. (Optional) Click **+** to add a third column.
3. Select the delimiter to separate the selected columns. Options include:
    - None ()
    - Space ( )
    - Comma (,)
    - Semicolon (;)
    - Pipe (|)

4. The resulting value displays for review using sample values from each selected column.
    a. (Optional) Check **Ignore if blank** to allow the formatting to ignore blank data values in the selected columns.

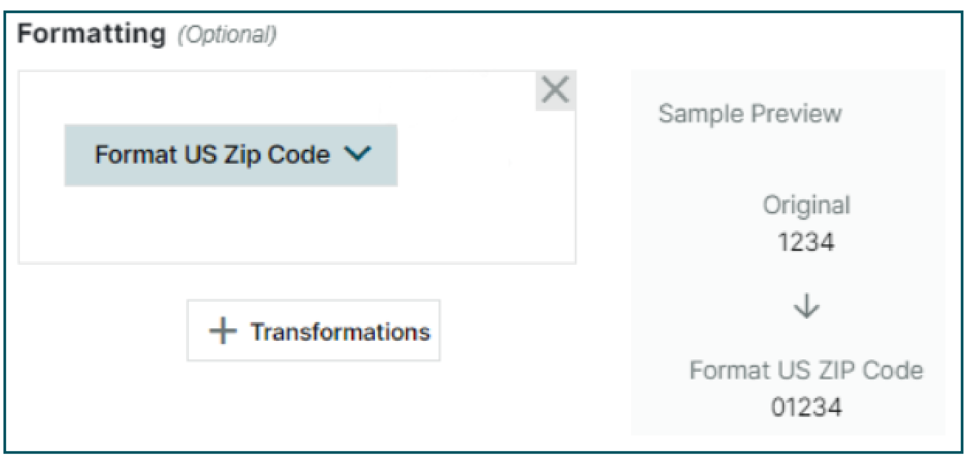


Format US ZIP Code Example

A Profile Import integration with ZIP Codes for all the locations, but these codes may have missing leading zeros or extra characters after the dash.

Use this format option to ensure ZIP codes have at least five digits in length by adding leading zeros and removing dashes or characters after the dash.

1. Under **Formatting**, select **Format US ZIP Code** from the drop-down.

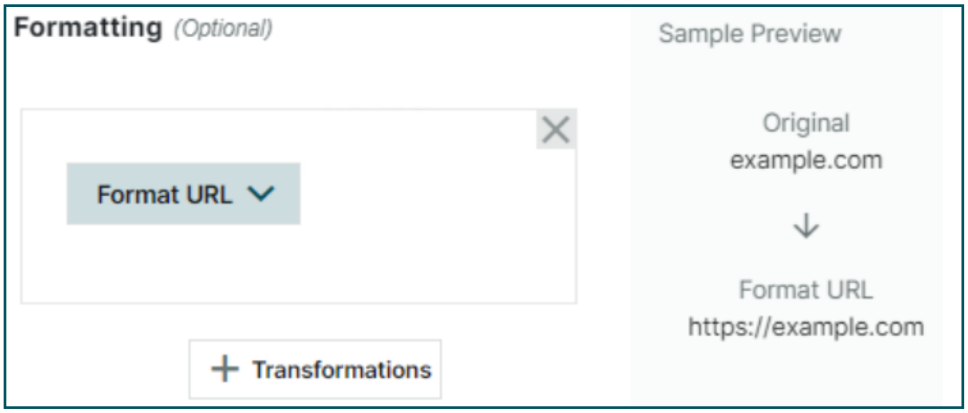


Format URL Example

A Profile Import integration to save a well-formatted URL of the profile's website, but the data contains the column **Homepage** which has URLs that are missing the HTTPS:// prefix.

Map the Reputation Field **Website URL** with a formatted version of the value in the **Homepage** column.

1. Under **Formatting**, select **Format URL** from the drop-down.
2. The resulting value is displayed for review using sample values from the selected column in the data.

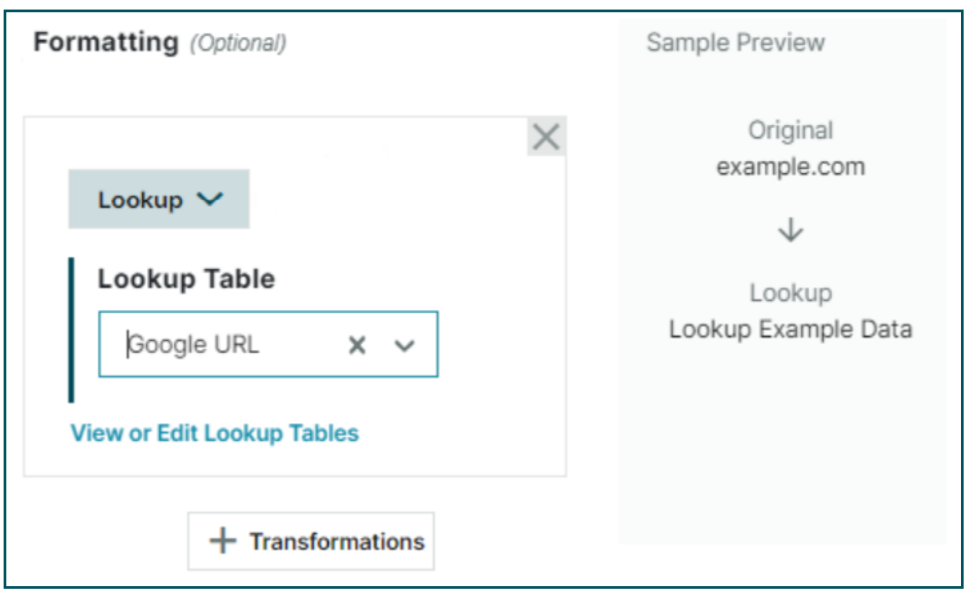


Lookup Example

A Review Request integration with **store-codes** for all the locations in the CRM while the Reputation field **location-code** are all sequential numbers.

Add a Lookup Table to the Rep Connect integration to define the **store-code** to **location-code** mapping, and then use this lookup table for the integration.

1. Under **Formatting**, select **Lookup** from the drop-down.
2. Choose which lookup table to use from the **Lookup Table** drop-down.
3. (Optional) Click **View** or **Edit Lookup Tables** to view, edit, or create lookup tables.



Note: See Lookup Tables on page 61 on how to view, edit, or create lookup tables.

Split Example

A Review Request integration for only the First Name of the customer in the requests but the data contains a **Full Name** column.

Map the Reputation Field **to-name** to a value that is a partial text of the value from the **Full Name** column of the data.

1. Under **Formatting**, select **Split** from the drop-down.
2. Select the separator to split the text.
    - This splits the text from the column at every occurrence of the separator within the text.
    - Options include:
        - None ()
        - Space ( ) (selected in the example below)
        - Comma (,)
        - Semicolon (;)
        - Pipe (|)
3. Select the part of the text to use for the mapping.

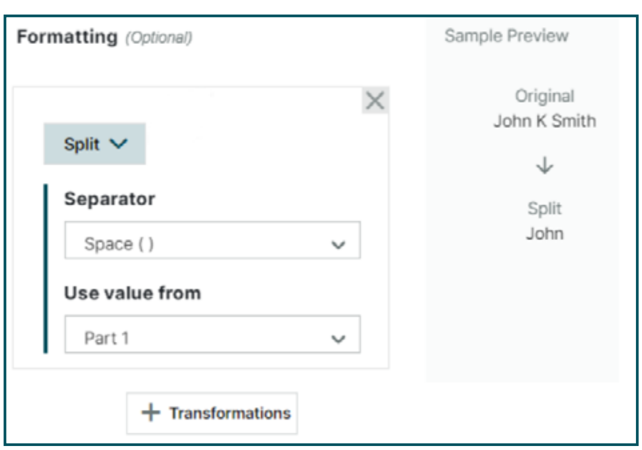
    Example:

    The full name "John K Smith" has two spaces, one after the first name "John" and another after the middle initial "K."

    The original text "John K Smith" is split into three parts:

    - Part 1 – John
    - Part 2 – K
    - Part 3 – Smith

    The resulting value is displayed for review using sample values from the selected column in the data.
4. Click **Save**.

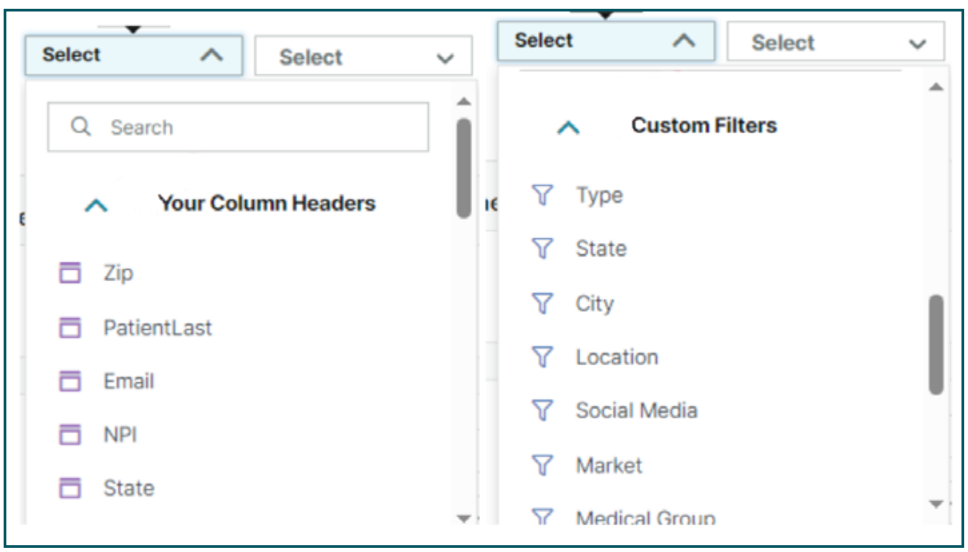


Dynamic Template Example

Note: This option is only available when mapping the Reputation field template. Templates must be selected in the **Template** step to display in the **Mapping** step.

A Review Request integration to send requests using one specific template for email requests and another template for SMS requests. Use the Dynamic Template to add template rules.

1. Under **Mapping**, select **Dynamic Template** from the drop-down.
2. In the first **IF** block, choose a field to act on.
   - Example: HomePhone
   - The fields displayed are divided into two sections:
     - **Your Column Headers**: Column headers from the data source.
     - **Custom Filters**: Location Custom Filters from the Locations screen.
       - The **Custom Filters** section also displays top-line filters that are non-functional in this context. These will be removed in a future release. Review the Locations screen for the actual Custom Filters available for use.
   - Search for fields using the **Search** box or collapse either section by clicking the arrow next to the title.



3. To the right of the field name, choose a logic option.
   - Options include:
     - **Between**
     - **Contains** (case sensitive)
     - **Does Not Contain** (case sensitive)
     - **Equals** (requires an exact match)

    - **Greater Than**
    - **Is Empty**
    - **Is Not Empty**
    - **Less Than**.
    - **Is Email Valid**: Checks the email is properly formatted (but does not check if the email itself is valid).
    - **Is Phone Valid**: Checks the phone is a proper US format (but does not check if the phone is a cell, landline, or valid number).
  - If a logic option requires input, a box or boxes displays to the right of the option.
    - Example: If HomePhone **Is Not Empty**, or If Email **Is Email Valid**.
4. Add additional logic statements using the **+ and** or **+ or** buttons.
   - Example: If HomePhone **Is Not Empty** AND HomePhone **Is Phone Valid**.
5. Select the type of request to send: **Send SMS Request** or **Send Email Request**.
6. In the drop-down to the right, choose one or more templates to be selected.
   - If **Send SMS Request** is selected, only SMS-type templates display in the drop-down.
7. Complete the **% of customers** field.
   - If 100% of the matching templates are to be sent to one template, select one template and enter 100 in the **% of customers** box.
   - If a split is desired, select at least two templates from the drop-down and enter appropriate percentages in the **% of customers** box.
8. Choose the **+ Else if** box if another logic statement is required. Otherwise, click the **+ Else** box to finish the statement and choose the final template(s).

   Example:

   IF

   HomePhone **is not empty**

   Send SMS Request using 2 Templates

   Template “SMS Default Message” to **80% of customers**

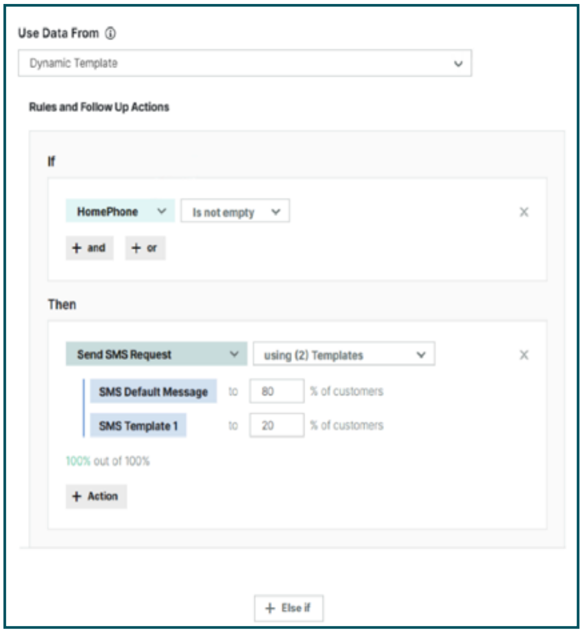
   Template “SMS Template 1” to **20% of customers**

   ELSE

   Send Email Request using 1 Template

   Template “Direct” to 100% of customers

9. (Optional) Click the **X** next to a logic step or logic group the item.



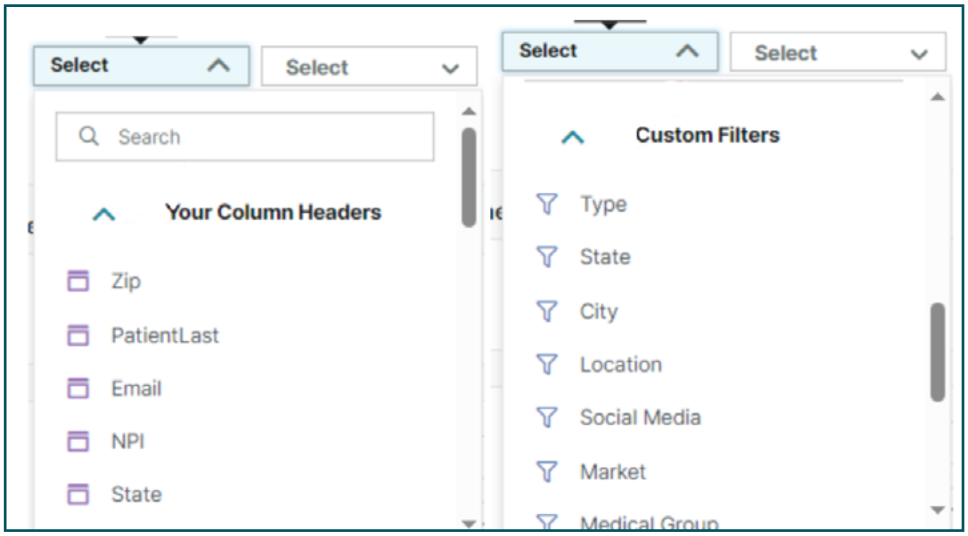
Dynamic Mapping Example

For any integration type, to map one field if an input field is populated and another input field is not, or contains specific values, use the Dynamic Mapping.

If using Dynamic Mapping in the Location section, custom filters cannot be used. The location cannot be dependent on a custom filter of itself (endless loop). The records will fail for an invalid location.

1. Under **Mapping**, select **Dynamic Mapping** from the drop-down.
2. In the first **IF** block, choose a field to act upon.
   - Example: Customer Nickname
   - The fields displayed are divided into two sections:
     - **Your Column Headers**: Column headers from the data source.
     - **Custom Filters**: Location Custom Filters from the Locations screen. The **Custom Filters** section also displays top-line filters that are non-functional in this context. These top-line filters will be removed in a future release. Review the Locations screen for the actual Custom Filters available for use.

- Search for fields using the **Search** box or collapse either section by clicking the arrow next to the title.



3. To the right of the field name, choose a logic option.

   - Options include:
     - **Between**
     - **Contains** (case sensitive)
     - **Does Not Contain** (case sensitive)
     - **Equals** (requires an exact match)
     - **Greater Than**
     - **Is Empty**
     - **Is Not Empty**
     - **Less Than**
     - **Is Email Valid**: Checks that the email is property formatted (but does not check if the email itself is valid).
     - **Is Phone Valid**: Checks that the phone is a proper US format (but does not check if the phone is a cell, landline, or valid number).
   - If a logic option requires input, a box or boxes display to the right of the option.
     - Example: If HomePhone **Is Not Empty**, or If Email **Is Email Valid**.

4. Add additional logic statements using the **+ and** or **+ or** buttons.

   - Example: If HomePhone **Is Not Empty** AND HomePhone **Is Phone Valid**.

5. Select the field to map to.

    - If another logic statement is required, add it by choosing the **+ Else if** box. Otherwise, click the **+ Else** box to finish the statement and choose the final template(s).

    Example:

    IF

    Customer Nickname **is not empty**

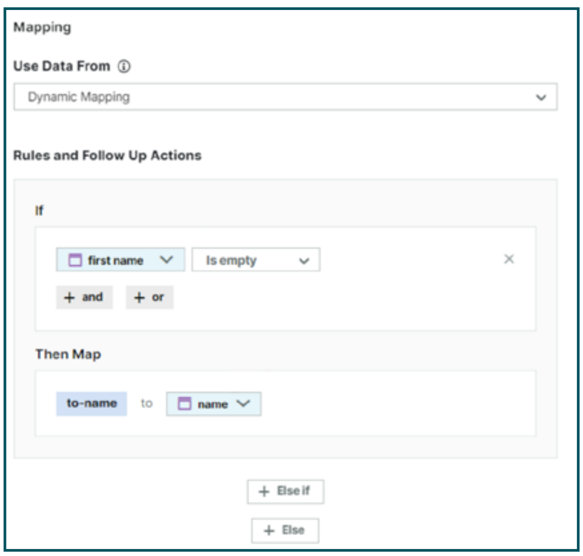
    Then Map

    to-name to Customer Nickname

    Else Then

    to-name to Patient First Name

6. (Optional) Click the **X** next to a logic step or logic group to remove the item.



Step: Exceptions and Delays (Filters)

This step tells Rep Connect which records to skip (filter out). For review requests, this step can also delay sending requests for some or all the records.

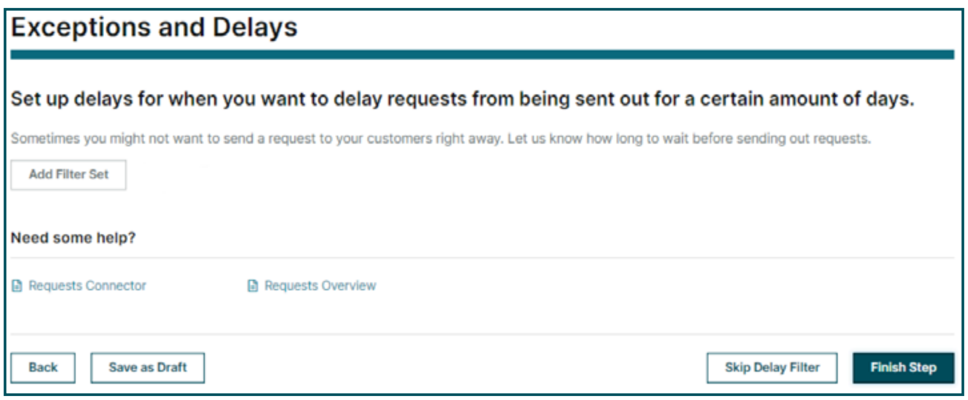
Exceptions and Delays is either Step 3 or Step 4, depending on the connector.

The exceptions page defines rules to determine which records to skip. For review requests, this means which requests not to send. For other imports, this means which records, such as surveys or users, not to import. Filtered records are marked in the **Integration Run History** as **Skipped**.

1. Click **Start**.

2. To set up filter logic, click **Add Filter Set**.

   - If the connector has the ability to delay records, the **Continue** button displays at the bottom of the screen. If not, the **Finish Step** button displays.



3. Type a filter name in the **Filter Set** box. Records skipped using the logic are included in the skipped history using the filter name provided.

   - The first logic grouping box displays.

Note: Make the filter names descriptive to quickly identify the reason while viewing history.

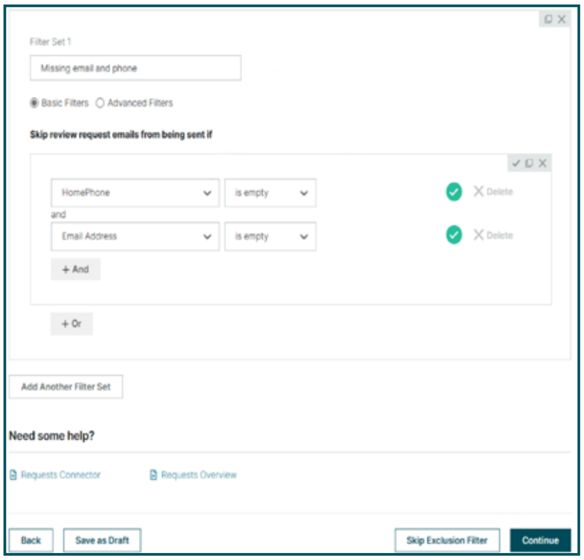
Example: “Email and phone are empty” or “Patient age less than 18.”

4. Use the drop-down to choose a field.
    - Example: HomePhone
    - The fields displayed are divided into two sections:
        - **Your Column Headers**: Column headers from the data source.
        - **Custom Filters**: Custom filters and other elements from the Location table.
5. To the right of the field name, choose a logic option. Logic options include:
    - Is greater than
    - Is greater than or equals
    - Is less than
    - Is less than or equals
    - Is equal to
    - Does not equal
    - Is like (case sensitive)
    - Is like
    - Contains (case sensitive)
    - Contains
    - Is not empty
    - Is not like (case sensitive)
    - Is not like
    - Is empty
    - Contains word (case sensitive)
    - Contains word
    - Does not contain (case sensitive)
    - Does not contain

> **Note**: Use case sensitive options for exact matches. If general matches are needed, do not use case sensitive.
>
> **Example**: To match on "Discharge," a case-sensitive match would be "Discharge" (with capital D), but a general match would be "discharge" or "DISCHARGE" (or any case combination).

- If a logic option requires input, a box or boxes display to the right of the option.
    - Example: If HomePhone **Contains** or If PatientAge **is less than**.

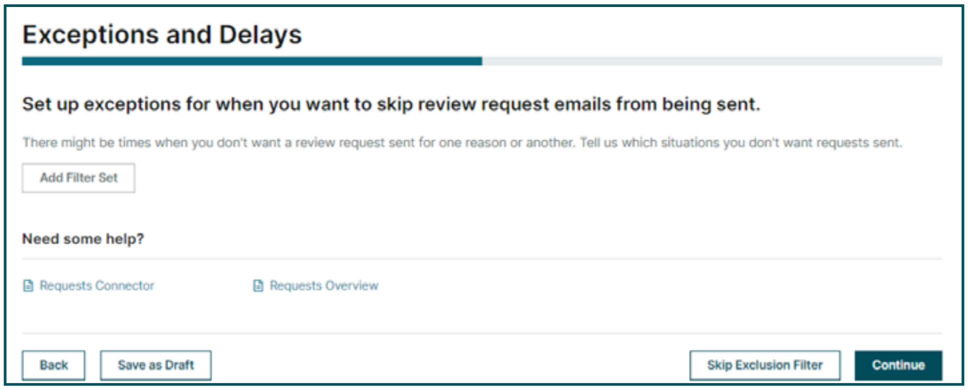
6. Add additional logic statements by using the **+ And** or **+ Or** buttons.
   - Example: If HomePhone **is empty** AND Email Address **is empty**.
7. To add another filter, click **Add Another Filter Set** to open a new logic box.
   a. (Optional) Click the **X** next to a logic step, logic group, or filter group to remove the item.
8. When a logic step is complete, click **Continue** to move on to the **Delay Filter** screen (if available) or **Finish Step** to move on to the next step.



> **Note**: The **Advanced Filters** option allows adding/editing custom Groovy scripts. This is for advanced users only.

- If the connector allows delay filters, the **Delay Filter** page displays. For review requests, this means how many days to delay sending the request texts or emails. Delayed records are marked in the **Integration Run History** as **Delayed** during the delay period.
- After the delay period is over, requests are sent and moved into the **Succeeded** or **Failed** categories.

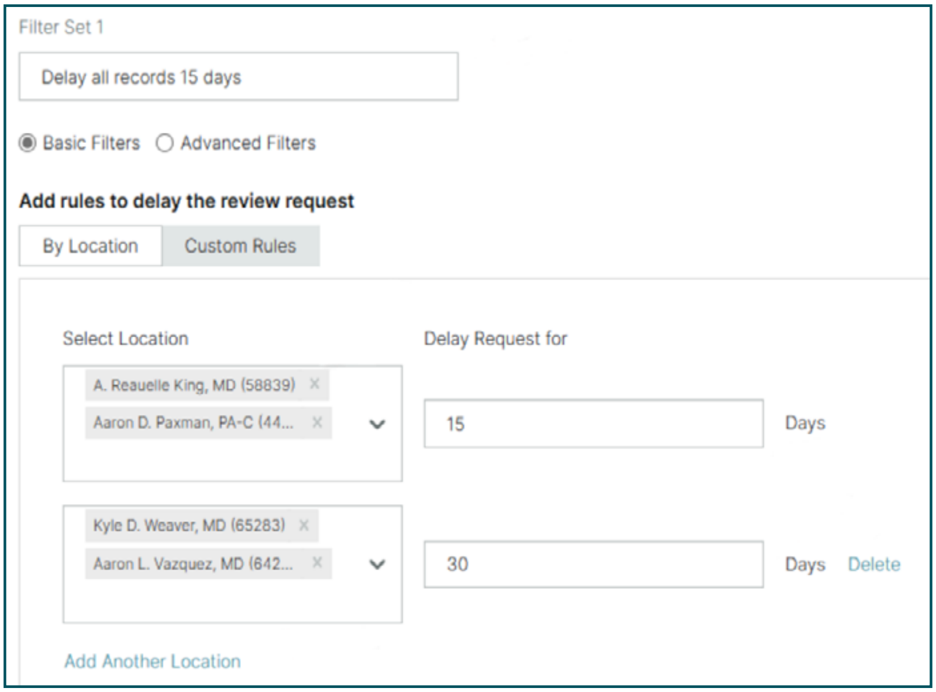
9. To set up delay logic, click **Add Filter Set**.



> **Note**: The **Advanced Filters** option allows adding/editing custom Groovy scripts. This is for advanced users only.

10. Type a filter name in the **Filter Set** box.
    - Records skipped using the logic are included in the **Delayed** history using the filter name provided.
    - Make the filter names descriptive to quickly identify the reason while viewing history.
        - Example: "Delay 7 days for maternity discharge" or "Delay 30 days."
    - The first logic grouping box displays the **By Location** tab.
11. To delay by location, select one or more locations from the **Select Location** drop-down menu. To delay all records, select **All Options**.
12. Enter the number of days to delay requests in the **Delay Request for** box.

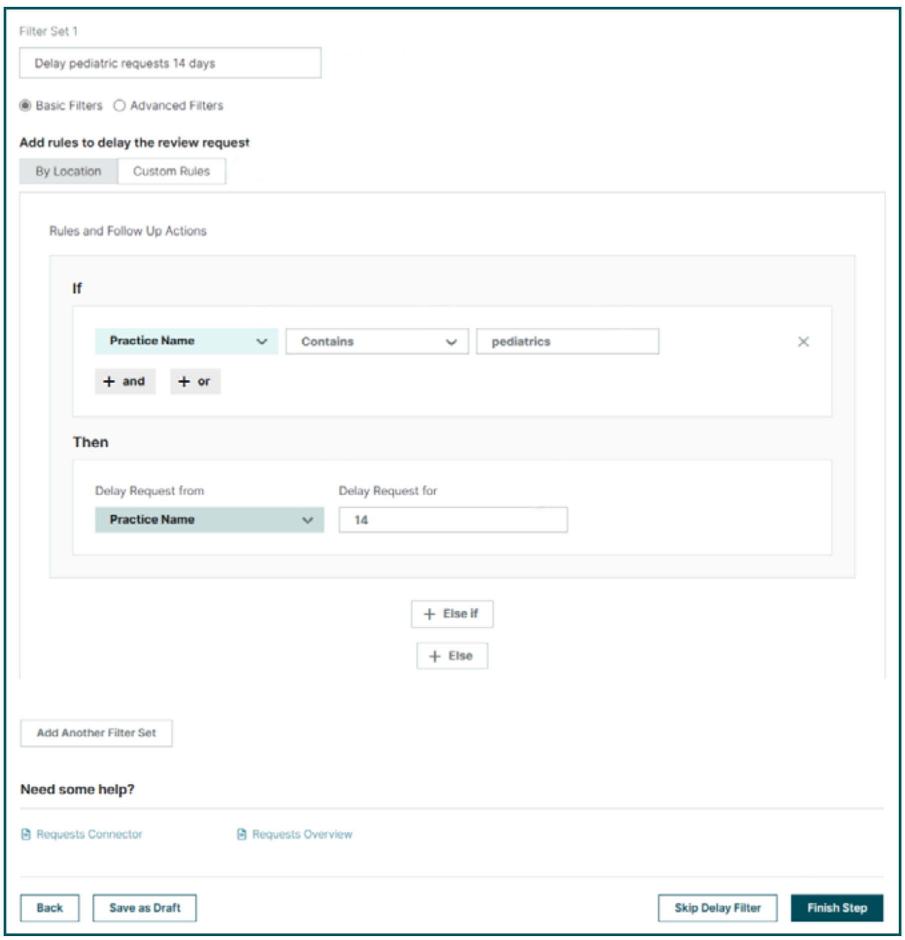
13. To have different delay days for different locations, click **Add Another Location** and select locations and delay days for that group.
    a. (Optional) Click **Delete** to remove a logic step.



14. To set up custom delay logic rules, click the **Custom Rules** tab.
15. In the first IF block, choose a field to act upon.
    - Example: Practice Name
16. To the right of the field name, choose a logic option. Options include:
    - Between
    - Contains
    - Does not contain
    - Does not Equal
    - Equals
    - Greater Than
    - Is empty
    - Is not empty
    - Less than
    - Is Email Valid: Checks the email is properly formatted (but does not check if the email is valid).
    - Is Phone Valid: Checks the phone is properly formatted (but does not check if the phone is a cell, landline, or valid number)

- If a logic option requires input, a box or boxes display to the right of the option.
  - Example: If Employee Name **contains** or if Transaction Type **equals**.

17. Add additional logic statements by using the **+ And** or **+ Or** buttons.
    - Example: If PracticeName **Contains** pedi **AND** Provider Name **Does Not Contain**.
18. In the **Then** section, choose another field and enter the number of delay days in the **Delay Request For** box.
19. To add another filter, click **Add Another Filter Set** to open a new logic box.
    a. (Optional) Click the **X** next to a logic step, logic group, or filter group to remove the item.
20. When a logic step is complete, click **Finish Step** to move on to the next step.
    - If another logic statement is required, add it by choosing the **+ Else if** box. Otherwise, click the **+ Else** box to finish the statement and choose the final template(s).
21. After a logic step is complete, click **Finish Step** to move on to the next step.



Step: Schedule

This step tells Rep Connect how often to execute the integration. Schedule is either Step 4 or 5, depending on the connector.

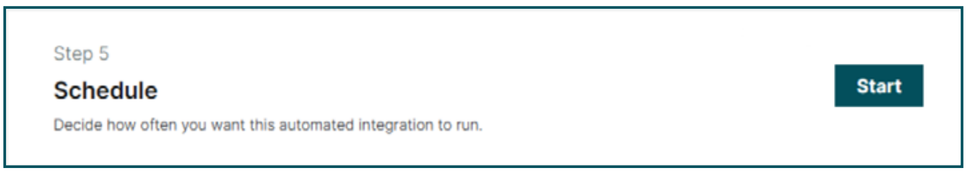
The **Schedule** page can define rules to determine how often to run the integration.

The default schedule is:

- Run every Monday at midnight PST.
- Start the scheduled runs today.
- For requests, sent immediately when the integration is run.

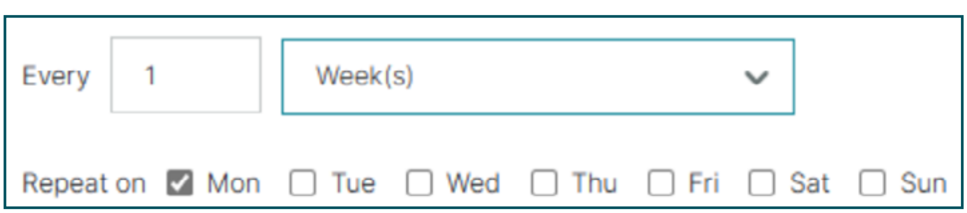
If there is a delay filter set, requests can also be sent on weekends.

1. Click **Start**.

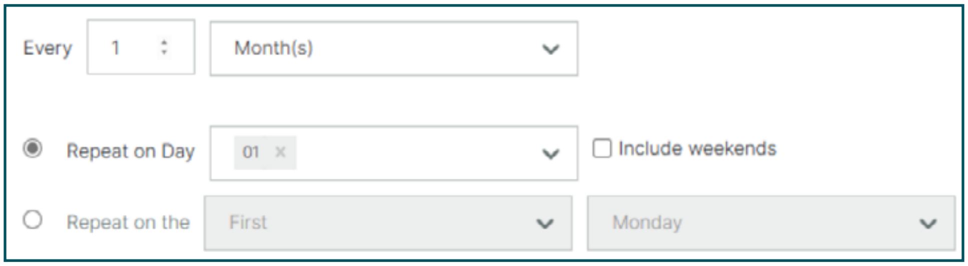


2. Enter a number in the **Every** field.
    - Example: To run every day, enter 1.
3. Select a repeat option from the drop-down.
    - Select **Include Weekends** to send requests or import data on weekends. Options include:
        - **Day(s)**: Runs M-F. To also run weekends, choose **Include weekends**.

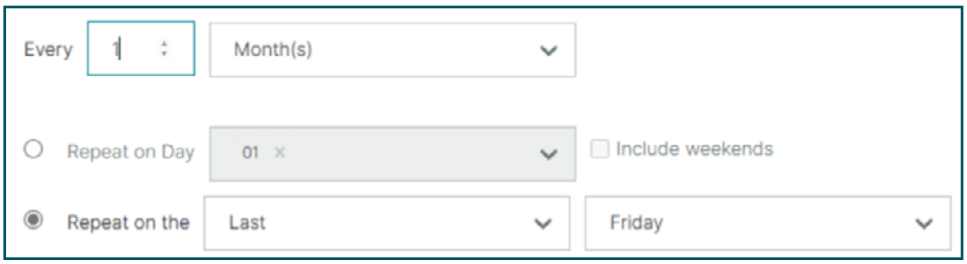
        - **Week(s)**: Choose one or more days to run on a weekly basis.



- **Month(s)**: Choose **Repeat on Day** to run every 1–12 months, on specific days of the month.
  - Example: Run every month on the first of the month. To include weekend days, if the day selected happens to fall on a weekend, choose **Include weekends**.

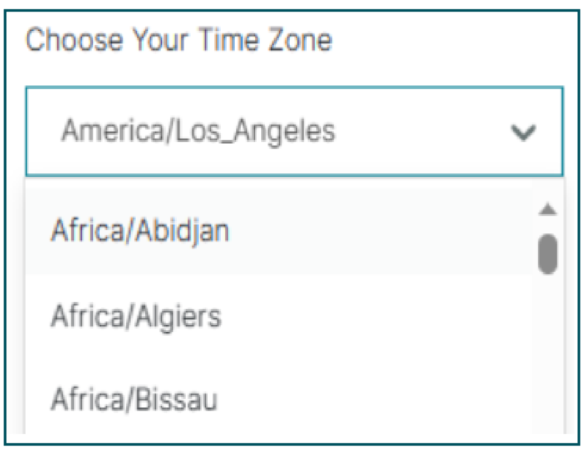


- Alternately, choose **Repeat on the** option, which includes **First**, **Second**, **Third**, **Fourth**, and **Last** and days of the month.
  - Example: Run every month on the last Friday.



4. Set a time zone using the Time Zone drop-down or enter the time zone code (example: EST) and select the appropriate returned option.

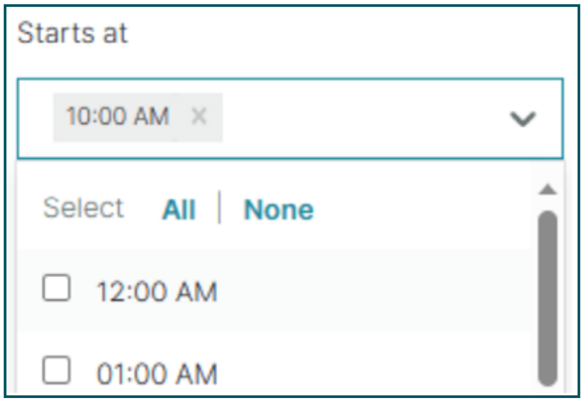
- Options are by Region/City.



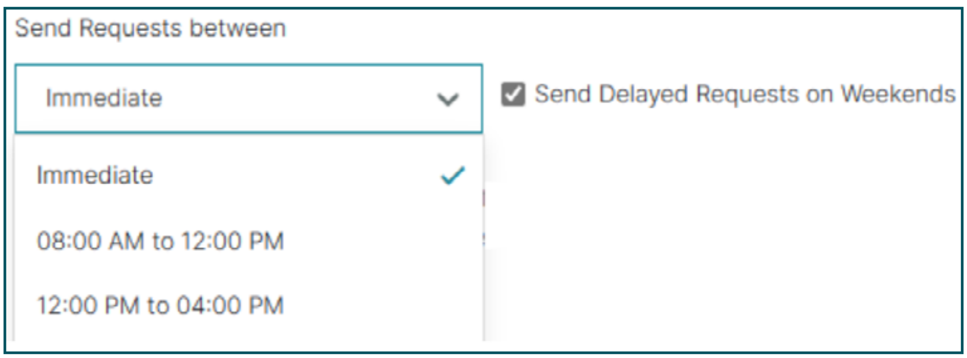
5. Set an initial start date. Clicking on the **Start Date** field opens a calendar picker.

6. Choose one or more times from the **Starts at** drop-down. Options include run times every hour.

   a. Click **All** to select every hour or **None** to clear all selections.



7. For review request/survey integrations only, choose when the requests should be sent using the **Send Requests between** drop-down, if not delayed by a delay filter. Choices include **Immediate** (when the integration runs) or in four-hour increments.



8. Click **Finish Step** to save the selections and continue to the next step.

Step: Notifications

This step sends run status reports via email about the integration. Additional users may edit the integration and complete this step to receive status reports.

Notifications are either Step 5 or Step 6, depending on the connector.

1. Click **Start**.

2. Select the desired options for notifications.

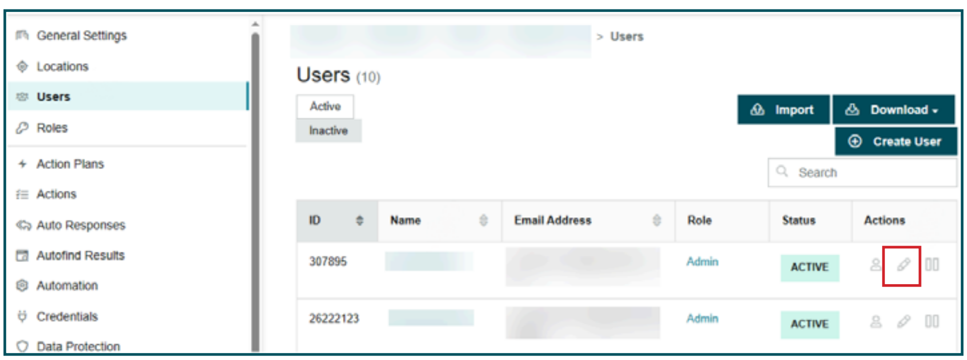
   - If the default options are satisfactory, click **Finish Step** to continue to the next step.
   - Going forward, any run activity (including test runs), can generate the status email.

3. By default, the integration name is populated in the **Name this Notification** box.
   - If desired, enter a new name.
4. Choose notification options:
   - Every time this integration is run (default).
   - Only when the integration was successful.
   - Only when the integration failed.
5. Click **Show Email Customization Options** to expand/collapse the customize section.
   - By default, the email subject line is {integration name} Run Summary. If desired, enter a new email subject line in the **Customize your Email Subject Line** box.
   - By default, the email message is **Here is a summary of the latest {integration name}**. If desired, enter a new email message in the **Customize your Email Message** box.
6. Click **Finish Step** to save the selections and continue to the next step.

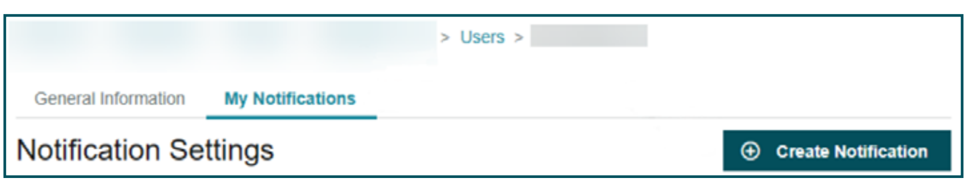
Set up Notifications via My Notifications

To create or change the notifications outside the integration wizard,

1. Click **Users**.
   - To change the notifications, the user must have the appropriate permissions.
2. Select a user from the list or click the pencil icon for the user.

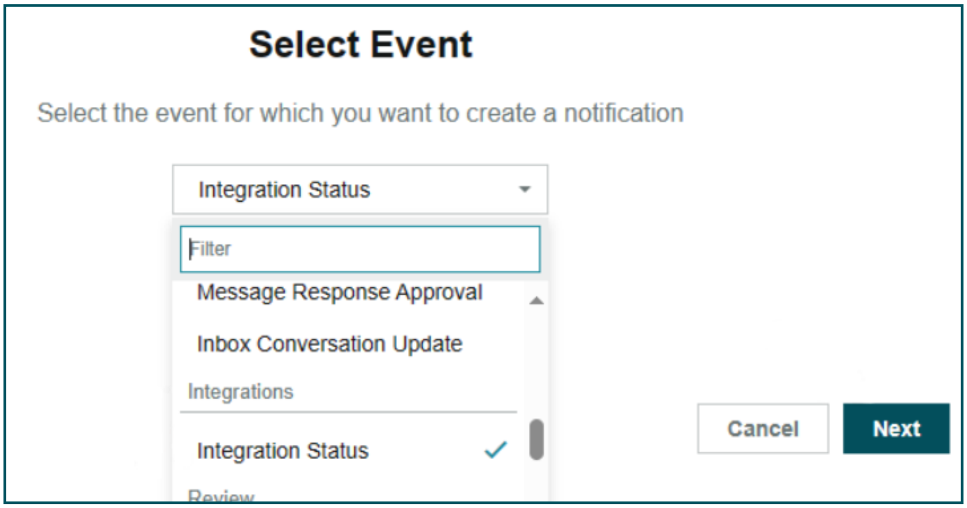


3. Click **My Notifications**.
4. Click **Create Notification**.



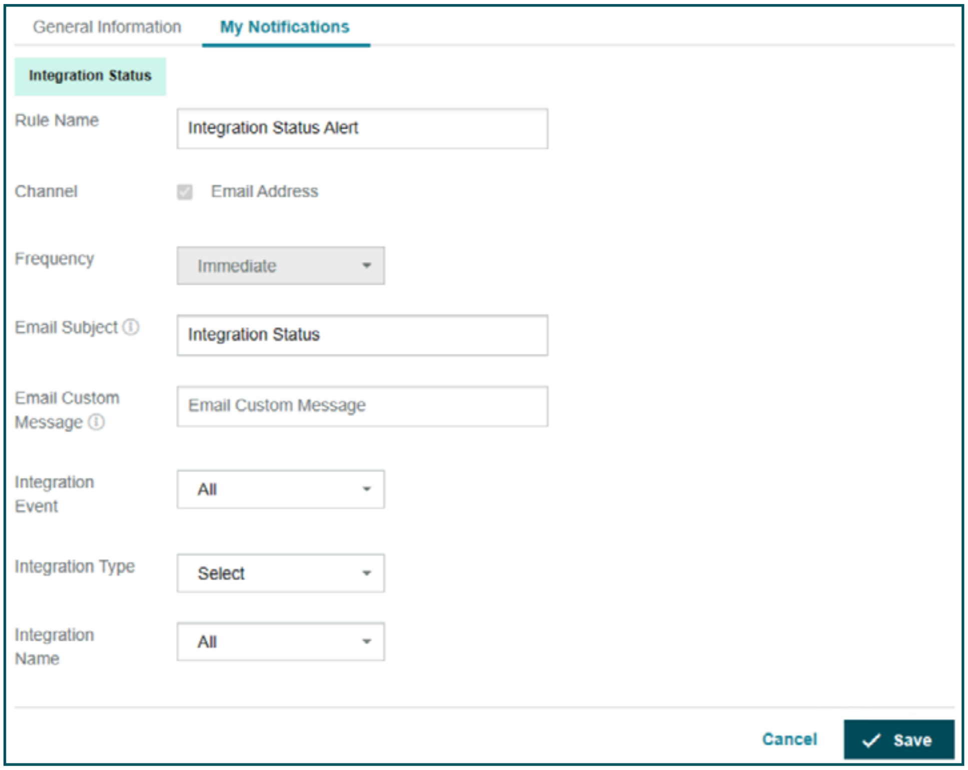
5. Select **Integration Status** from the **Select Event** drop-down.

6. Click **Next**.



7. Enter a new **Rule Name** or leave the default value.
   - **Channel** and **Frequency** are not selectable.
8. Enter a new **Email Subject** and **Email Custom Message** or leave the default values.
9. Choose a value under **Integration Event**:
   - All
   - Success
   - Failed
10. Select a value under **Integration Type**:
    - Profile Import
    - Review Request
    - Survey Import
11. Select value(s) under **Integration Name**:
    - All
    - Individual integrations.
12. Click **Save** to complete the setup.

13. Repeat as necessary to add different integration type notifications.



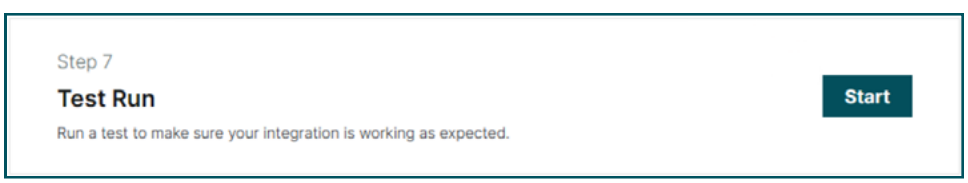
Step: Test Run

The **Test Run** step processes files, or pulls data from the CRMs via API, in test mode. Requests are not sent and data is not loaded via a test run. The Test Run can verify mapping and rule/logic setup. When the run is complete, an email notification is sent if the notifications have been set up or view the results on the Test Run history page.

The Test Run is either Step 6 or Step 7, depending on the connector.

The Test Run step is optional but recommended. Test runs can be completed as many times as necessary to ensure the integration is properly configured.

1. Click **Start**.

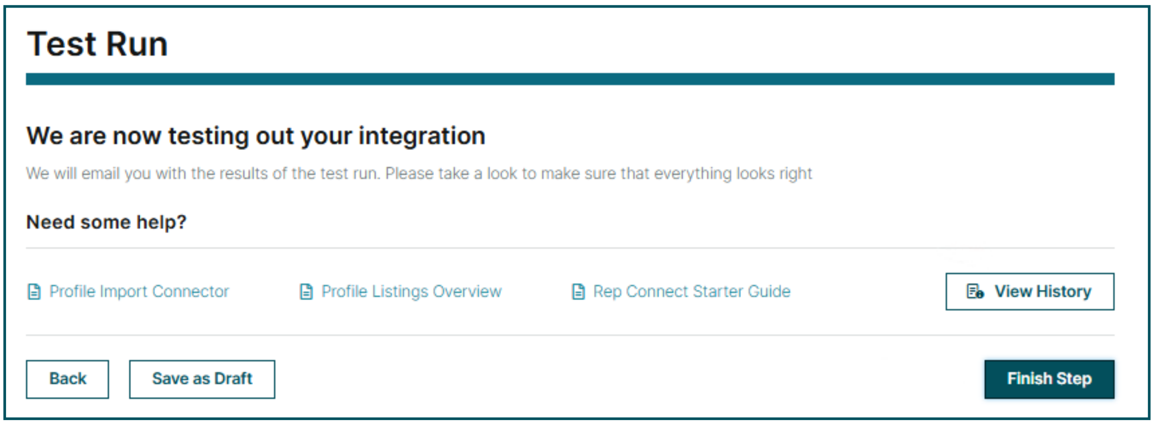


2. To use the data file used in the Mapping step, choose the **I want to use the data sample that was used in the Mapping step** option and click **Run Test** to perform the test run.

- If the integration is API-based, the CRM is queried for data.
- If uploading a different sample file, choose **I want to manually upload a data sample** and either drag-and-drop the file into the dashed area on screen, or click **Browse** to choose a file.
- If using a sample data file, click **Download Sample Test File**. Alternatively, visit the **Run Details** screen and export the data.

3. Click **Run Test** to perform the test run.
4. Click **View History** to see the test run results or **Finish Step** to return to the wizard.

    - Export connectors do not provide an option to select files because the connector is creating the test file from platform data.



API integrations are subject to whatever data is available on the CRM at the moment. To test specific scenarios, export the data and modify the file. Upload the sample file in the **Test Run** step to verify different scenarios.

Step: Review and Submit

This step runs the integration as scheduled, either in **Active** or **Test** modes. Return to this step if the integration was started in **Test** mode and is ready to change to **Active** mode, or vice-versa.

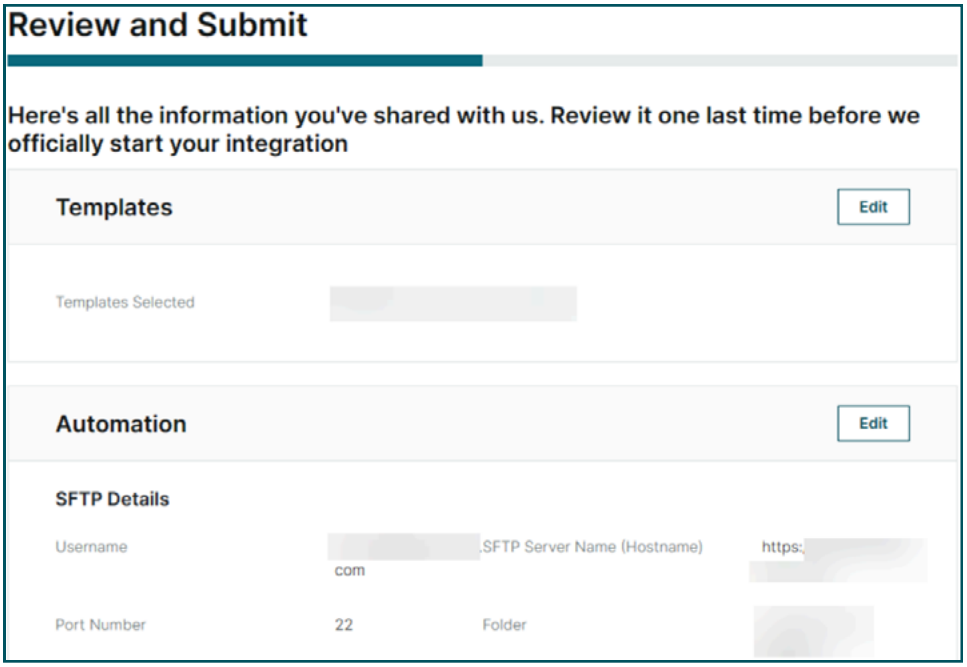
Review and Submit is either Step 7 or Step 8, depending on the connector.

1. Click **Review**.

    - The screen displays all the selections for review purposes, by each step.

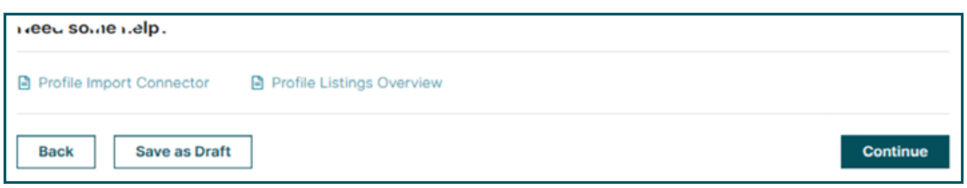
2. To make changes to a step, click the **Edit** button in a section to return to that step.

3. Complete the step and then return to the **Review and Submit** step to continue.



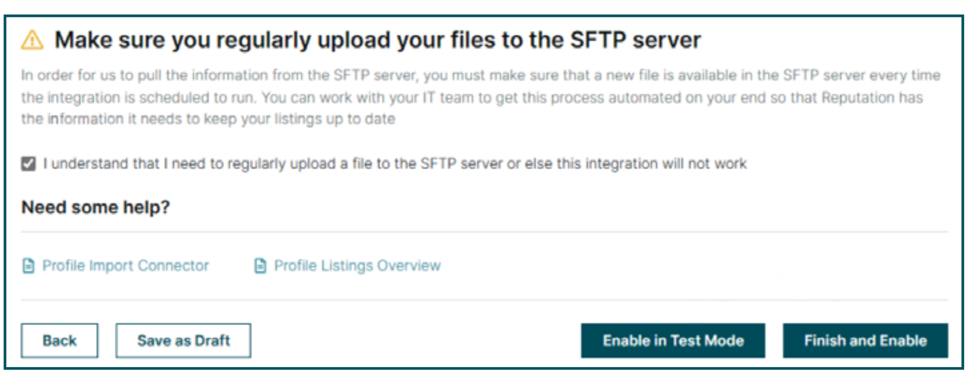
4. For API-based integrations, click either **Enable in Test Mode** or **Finish and Enable** at the bottom of the screen to complete this step.

5. For file-based integrations, click **Continue** at the bottom of the screen to move to the next page.



   a. Check the box next to the file acknowledgment to activate the buttons.

   b. Click either **Enable in Test Mode** or **Finish and Enable** at the bottom of the screen to complete this step.



6 | Lookup Tables

Lookup Tables

Use lookup tables to translate incoming or outgoing data to or from Reputation platform data. All alphanumeric data can be translated using lookup tables.

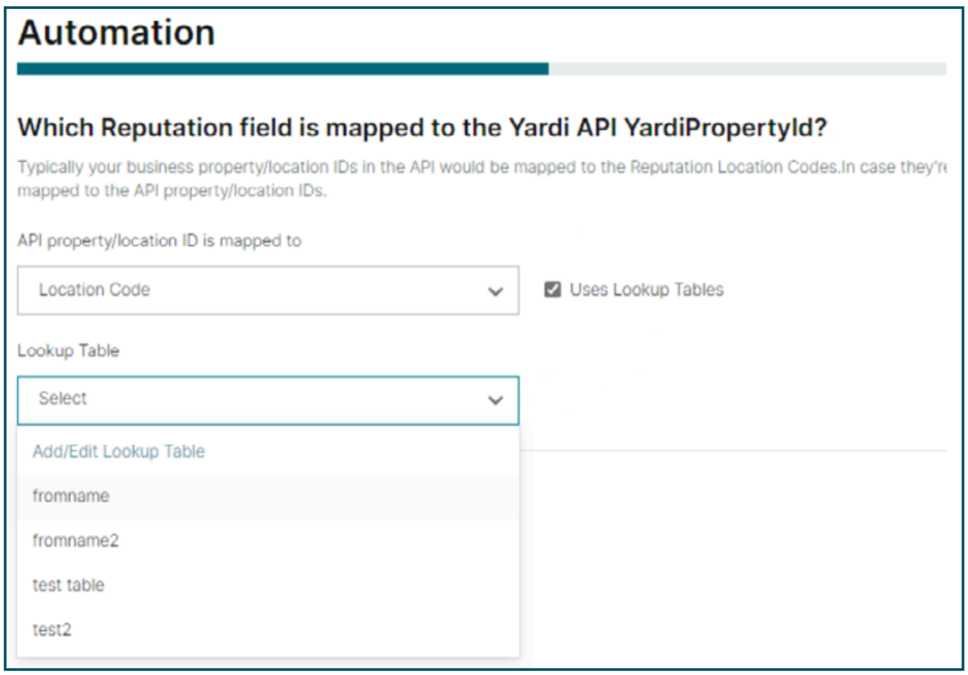
Access Lookup Tables

Lookup tables can be used in either the **Automation** or **Mapping** steps.

Automation Step

Only select API-based connectors offer location options in the **Automation** step.

1. Check the **Uses Lookup Tables** box.
2. From the **Lookup Table** drop-down, select an existing table or click **Add/Edit Lookup Table** to open the **Edit Lookup Tables** screen.



Lookup Table Example: Automation Step—Location Data

Only API-based connectors where individual locations are sent to the CRM can use lookup tables in the **Automation** step.

The Yardi connector queries the Yardi CRM system by sending Yardi Property IDs to return data for each property. In the case where the Yardi Location IDs do not match the Reputation Location Codes, and other translation methods such as Unique Program Codes (UPCs) containing the Yardi Location IDs are not present, a lookup table can be created to translate the codes.

Because this table is used in the **Automation** step, the data is:

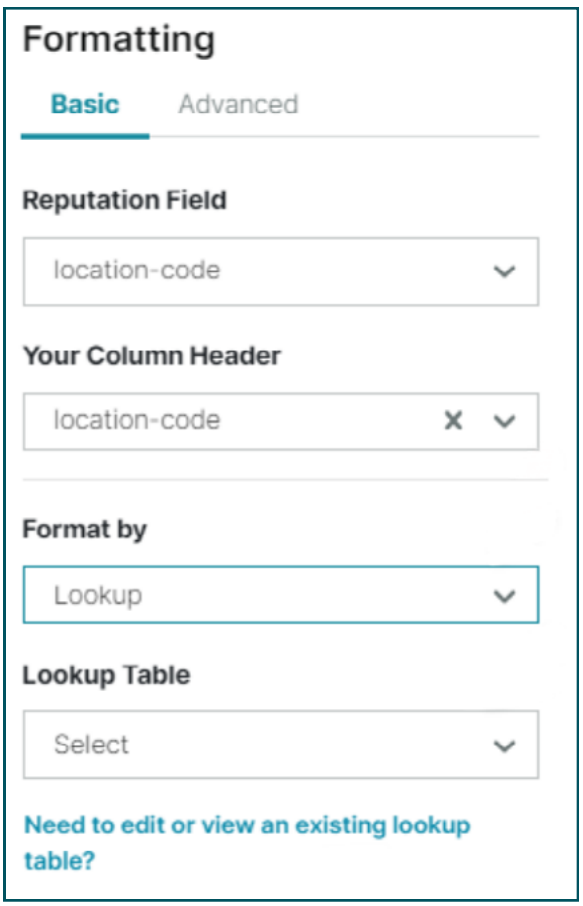
Reputation Data (Location Codes)	3rd Party Data (Yardi Property IDs)
1234	ABC
2345	DEF

The Yardi connector reads Reputation Location Codes “1234” and “2345” and calls the Yardi CRM using Yardi Location IDs “ABC” and “DEF” respectively.

The return data for properties “ABC” and “DEF” is then translated back into Reputation Location Codes “1234” and “2345” respectively.

Mapping Step

The **Mapping** step is the most common place to use lookup tables.



1. On the **Data Formatting** (Transformation) page, click the pencil icon in the **Edits Made** column to open the **Formatting** panel.
2. Choose **Lookup** from the **Format By** drop-down.
3. Choose an existing table from the **Lookup Table** drop-down or click **Need to edit or view an existing lookup table?** to open the **Edit Lookup Tables** screen.

Lookup Table Example: Mapping Step—Location Data

Lookup tables are most often found in the **Mapping** step.

All connectors can use lookup tables to translate third party data into Reputation data. In this example, the third-party CRM data is location codes, and the Reputation location codes do not match the third-party data and other translation methods, such as UPCs containing the CRM's location codes, are not present.

Because this table is used in the **Mapping** step, the data is:

3rd Party Data (CRM Location Codes)	Reputation Data (Location Codes)
rockridge	1001
shadypines	1002

In this example, incoming data is translated into Reputation location codes, so CRM locations "rockridge" and "shadypines" are translated to Reputation location codes "1001" and "1002," respectively.

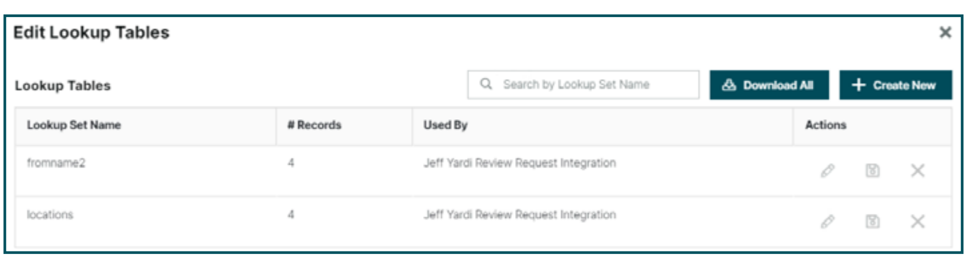
Lookup Table Example: Mapping Step—Survey Data

Other types of data can be translated as well. In this example, a 1–5 numeric response is translated into responses as defined on the survey and incoming data is translated into Reputation survey results, so "1" is translated to "Excellent," etc.

3rd Party Data (External Survey Results)	Reputation Data (Reputation Survey Results)
1	Excellent
2	Very Good
3	Good
4	Fair
5	Poor

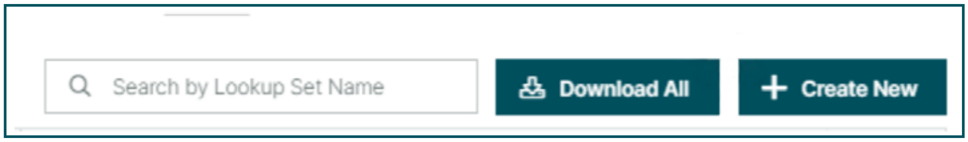
Edit Lookup Tables Screen

From this screen, create, edit, delete, and download lookup tables. With multiple tables, filter the display by typing in the **Search by Lookup Set Name** box.



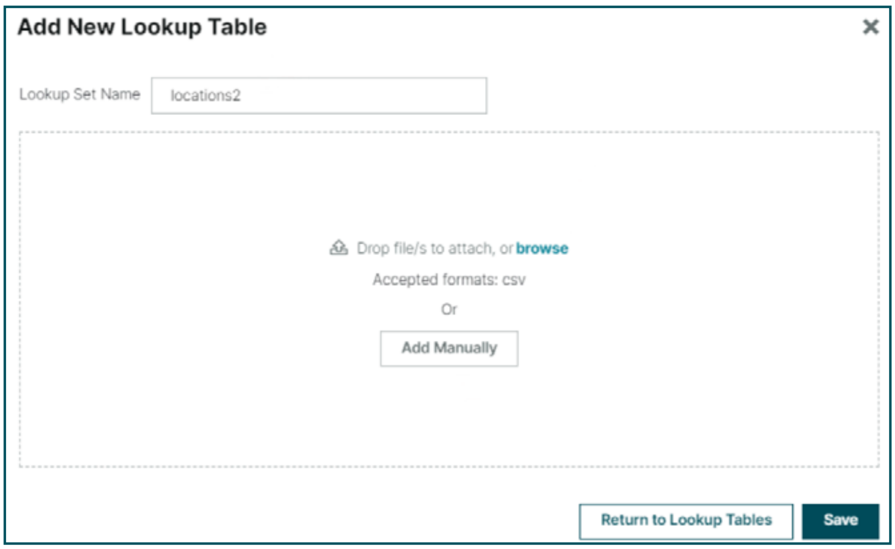
Creating Lookup Tables

1. Click the **Create New** button to open the **Add New Lookup Table** screen.

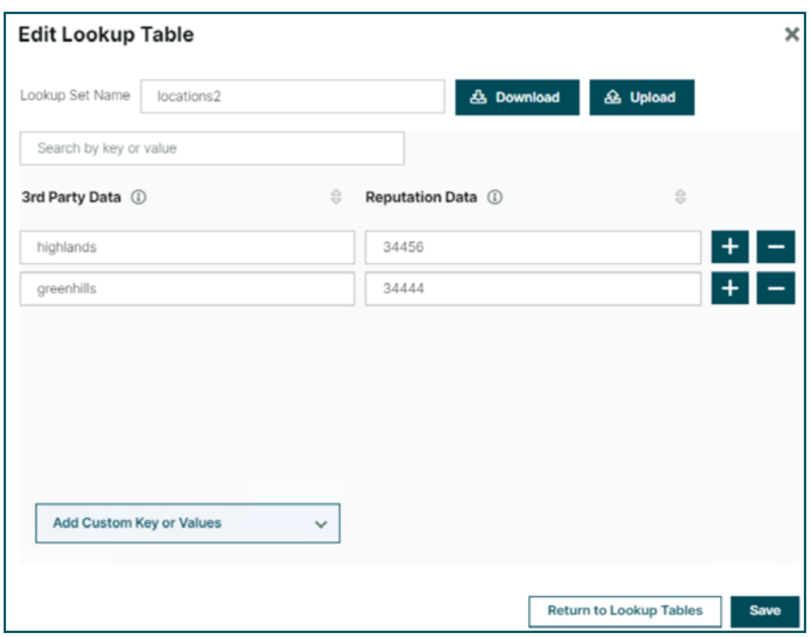


2. Type a unique table name in the **Lookup Set Name** box. When saved, this table name appears in the **Lookup** drop-down.

   a. If a two column CSV file is ready to upload, drag the file into the attach area or click **browse** to open an upload dialog box.



3. Click **Add Manually** to create a table from scratch.



   a. Click **+** on a row to add an additional row.

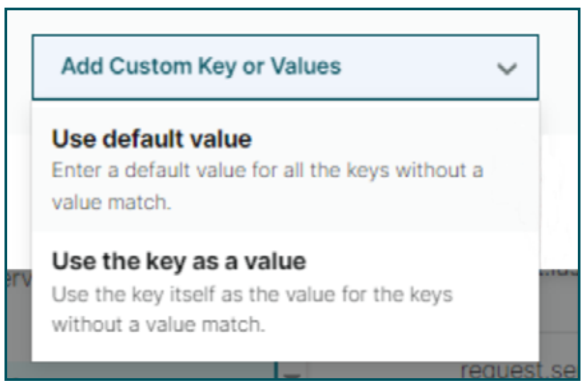
   b. Click **-** on a row to delete that row.

4. To export a CSV file copy of the table, click **Download**.
5. To import a two column CSV file, click **Upload**.
6. Click **Save** to save the work and return to the **Edit Lookup Tables** screen.
    a. Click **Return to Lookup Tables** to close the table without saving the work.
7. To filter values in large tables, type in the Search by key or value box.
8. Click the column headers to sort ascending and descending.

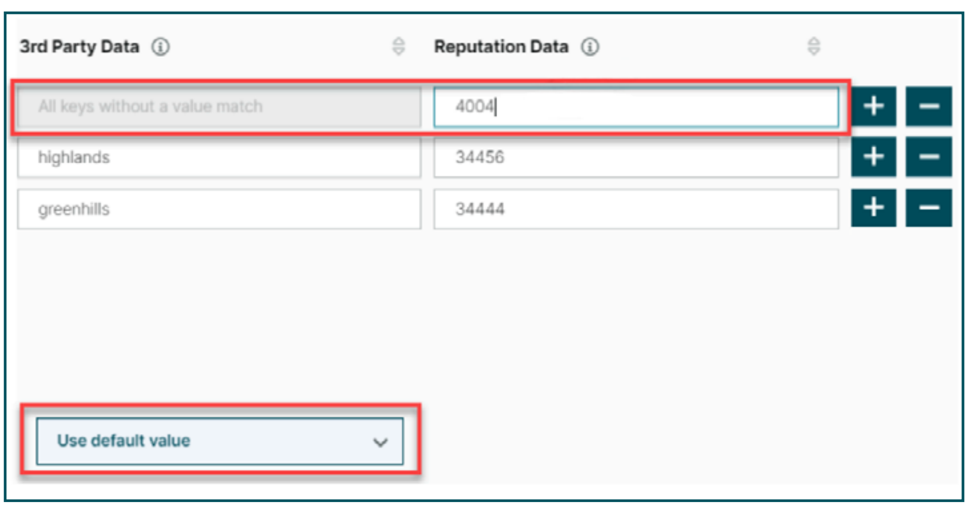
The values in the left column must be unique (no duplicates). However, values in the right column can be duplicated. An example is where survey scores are converted from a 10-point scale to a 5-point scale, i.e., 1 → 1, 2 → 1, 3 → 2, 4 → 2, 5 → 3, 6 → 3, 7→ 4, 8 → 4, 9 →5, 10 → 5.

If there is no match in the lookup table, blanks (no value) are returned. Required fields, such as location or template, cause missing/invalid location/template errors during processing.

Use the options at the bottom of the lookup table to correct for these cases.

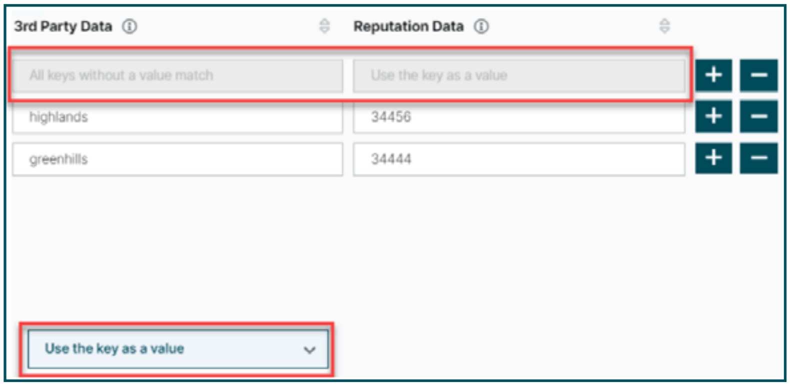


- **Use default value**: If no match is found in the lookup table's left column, use a static value instead. When this option is selected, a row is automatically inserted into the lookup table. Type the default value in the table as shown:



In this example, if the location value “westfalls” was used as a lookup value, “4004” would return because the right column contains values “highland” and “greenhills” but not “westfalls.”

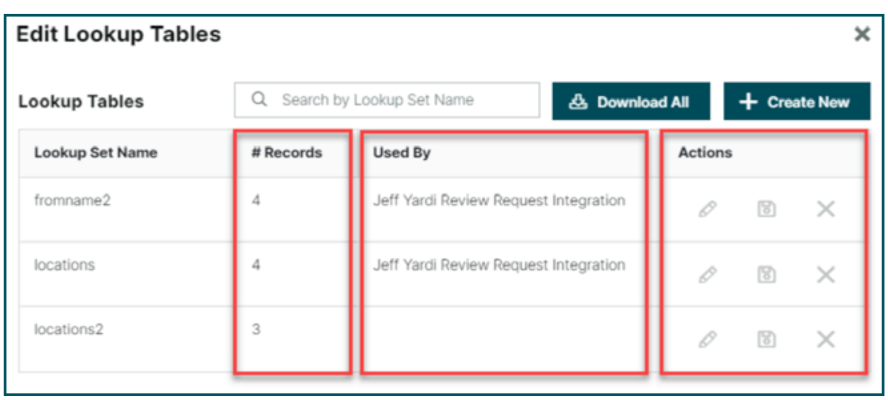
- **Use the key as a value**: If no match is found in the lookup table’s left column, use the value used for lookup as the value returned. When this option is selected a descriptive row is automatically inserted into the lookup table.



In this example, if the location value “westfalls” was used as a lookup value, “westfalls” would return because the right column contains the values “highland” and “greenhills” but not “westfalls.”

Additional Edit Lookup Table Features

1. Click the **X** to return to the **Transformation** panel.
   - The number of rows is shown in the **# Records** column.
   - If a table is used in an integration, the integration name displays in the **Used By** column. If the column is blank, then the table is not mapped in an integration.
   - The **Actions** column contains the following options:
     - **Edit** (pencil icon): Opens a lookup table for editing.
     - **Save as New** (save icon): Copies a table. The new table does not have a name; enter a value before saving.
     - **Delete** (X): Deletes a table. Tables cannot be deleted if they are used by an integration. Remove the table from the integration before deleting.



10 | Premium Paid Services

Premium Paid Services

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

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

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

11 | Additional Resources

Additional Resources

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

- Actions
- Admin
- Business Listings
- Customer Journey Insights
- Dashboards
- Experience
- Inbox
- Mobile App
- Reports
- Reputation Score
- Requesting
- Reviews
- Social Listening
- Social Publish
- Surveys

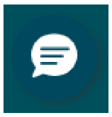
Contact Support

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

