

Rep Connect

A Quick Start Guide



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You

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Rep Connect Overview

Configure and manage automated integrations within the platform.

Empower business transformation by integrating Reputation data across your key business tools. Rep Connect allows you to configure and manage these integrations directly from the platform.

What is an Integration?

An integration is when separate things are brought together. An integration in technology 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 technology platforms to work together as they allow information technology (IT) systems to work together. Integrations are a way 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. Rep Connect allows you to configure and manage these integrations directly from the platform.

Note: New integrations are constantly being developed and added to our platform. If you have a request for a particular integration, please let us know through our Idea Forum: <https://reputation.com/idea-forum-faqs/>

Enabling Rep Connect

There are three ways to sign into your Reputation platform from your mobile device. You can either use a Magic Link, the email and password you use to sign in on a computer, or SSO within the platform.

Reach out to your support for assistance enabling Rep Connect for your account. Once enabled, configure permissions for users managing your integrations.

To set permissions for your users:

1. From the platform, click **Settings**.
2. From the left panel, click **Roles**.
3. Click the role you want to modify.
4. Click the **Edit** icon at the top of the page to edit your preferences.
5. Scroll down to find Integrator. Under Rep Connect, select the View and Add checkboxes at a minimum.

Integrator	View	Edit	Add	Delete	Other Actions
REP CONNECT					
Rep Connect	✓	✓	✓	✓	Advanced Scripts Clone Integration Export Results Export/Import Lookup Tables Run Now Test Mode

6. Click **Save**.

Note: Only users who have permission to edit or add roles can adjust Integrator settings.

Managing Integrations

Add, manage, and monitor integrations with the platform via connectors. Within Rep Connect, you can:

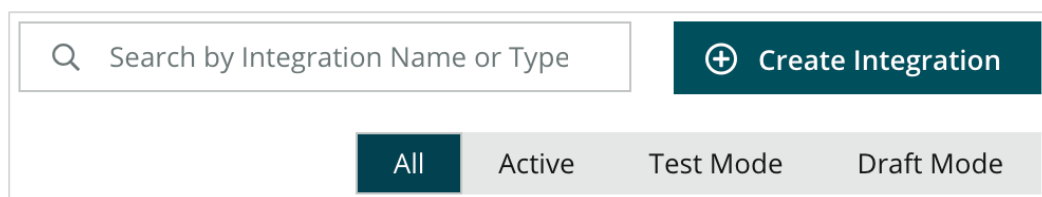
- View existing integrations and their execution details within your account.
- Easily configure integrations through a guided user interface.
- Access detailed documentation for each connector.
- Schedule integrations to run and/or execute an on-demand integration.
- Actively monitor your integrations 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 any issues.

Heads Up! Keep in mind, there are no limits on the number of integrations you can build, but each integration must have a unique name.

Adding Integrations

Build a new integration through the self-serve setup wizard.

1. Click the gear icon in the top right corner for **Settings**.
2. Click **Rep Connect** from the side panel.



The screenshot shows a user interface for managing integrations. At the top, there is a search bar with the placeholder text "Search by Integration Name or Type" and a magnifying glass icon. To the right of the search bar is a dark teal button with a white plus sign and the text "Create Integration". Below the search bar, there are four filter buttons: "All" (dark teal), "Active" (light gray), "Test Mode" (light gray), and "Draft Mode" (light gray).

3. Click **Create Integration**.

4. Choose from the list of available connectors and click Add Integration. Available connectors depend on the vertical your business is in, your account subscription, and the sources enabled.

5. Click **Let's Get Started** to follow the self-serve wizard within the platform as it guides you through the step-by-step process of configuring each aspect of the integration. This wizard will also guide you through setting up an email notification alert for yourself so that you can receive notifications about the status of your integrations each time it executes.

Note: Your integration will remain in “Draft Mode” until you complete the configuration and enable it in the final “Review and Submit” step.

6. Choose to enable or disable the integrations anytime from within the Rep Connect settings by toggling it On/Off. (Refer back to Steps 1 and 2 above to get here.)

Active	Integration Name	Integration Type
<input type="checkbox"/> Off	Reputation ... Draft Mode	Requests
<input type="checkbox"/> Off	SFTP Profile Import Integration	Profile Import

Managing Active Integrations

View the name, next scheduled run date, last run date, and status of each active integration. Toggle integrations on to enable and off to disable.

Click the ellipsis on an integration to view management options.

Action	Description
Run Now	Run integration before the next scheduled run date. This will queue the integration to be executed immediately regardless of the scheduled execution configured.
View	This allows you to view (read-only) the integration configuration preventing any accidental changes.
Edit	Adjust an active integration. Make your updates, perform a test run to ensure all configurations are correct, and save the configuration. The changes will apply the next time the integration runs.
View History	On the Integration History page, view how many times the integration has run, the execution start time, and status of each run. Click the ellipsis and choose View Details to review all details of the integration including the number of records succeeded, the number of records that failed (if any), and any error messages. Download the source file to help in resolving any issues that may have caused records to fail.
Delete	If the integration has never been executed before, this will delete the integration and remove it from "Active Integrations." If the integration has been executed before, this will simply disable the integration and it will still appear under "Active Integrations." This allows for preservation of the history of the integration executions.

Editing Integrations

To edit an existing integration,

1. Click into the integration you wish to modify or click the ellipsis for **Edit** and more options.
2. Click the **Edit** icon next to the integration name.
3. Click **Edit** on each step of the self-serve wizard within the platform to make and save any necessary changes throughout.

Step 1

Automation

Share details of how you will be sending us files with the information about your profile listings.

Edit

4. The self-serve wizard will direct you to do a Test Run. This ensures all configurations are correct.
5. Click **Review** and **Submit** to save the configurations and the changes will apply the next time the integration runs.

Available Out-of-the-Box Connectors

A connector is an out-of-the-box integration with a specific third-party system or flat file. It is designed for a specific purpose or use case. With these types of integrations, minor customizations are possible through a user interface.

Examples of connectors are Yardi, athenahealth, CDK, Sitelink, Review Requesting, and Profile Listings.

SFTP and API Connectors

Rep Connect provides two convenient ways for you to provide your data to Reputation:

- 1. Secure File Transfer Protocol (SFTP) Connectors:** Provide your data as a CSV or Excel file format to your support and upload it to either our SFTP or your own SFTP servers. You will need to provide the SFTP server information when you configure the integration via “Connectors”.
- 2. Application Programming Interface (API) Connectors:** Allow Rep Connect to fetch your data from your CRM/EHR or any 3rd party platform via APIs. You will need to provide the API credentials when you configure the integration via “Connectors”.

Premium vs. Free Connectors

Pre-Built Connectors (via API)

Pair commonly used tools to Reputation’s pre-built connectors via API to bring data and information in and out of the platform.

- Easily manage workflows and tasks without having to wait.
- Gain holistic visibility across all your teams.
- Reduce cost with resources at your fingertips.
- Eliminates the need for third-party involvement using our iPaaS connectivity.
- No costly licenses or contracts with additional vendors.
- Choose from preferred brands and tools businesses use daily for all your integration needs.

Available Connectors

Reputation offers free and premium out-of-the-box connectors.

Connector Name	Use Cases	Premium/Free
Profile Import	Listings Import Integration	Free
Requests	Review Request Integration	Free
Survey Import	Third-Party Survey Data Import Integration	Free
Entrata Requests	Review Request Integration	Free
Entrata Requests	Review Request Integration	Free
Sitelink Requests	Review Request Integration	Free
ResMan Requests	Review Request Integration	Premium
Yardi Requests	Review Request Integration	Premium
Yardi Senior Living Requests	Review Request Integration	Premium
Sherpa Senior Living Requests	Review Request Integration	Free
CDK Requests	Review Request Integration	Free
ModMed Requests	Review Request Integration	Free
AthenaHealth Requests	Review Request Integration	Premium
Salesforce Requests	Review Request Integration	Free
Google Data Studio (Looker Studio)	Business Listings	Free
HubSpot - Reputation Summary Metrics	Summary Data, Review and Survey Request Integration	Free to Hubspot users

Note: View our Partner page (<https://reputation.com/partners/>) for our full list of out-of-the-box connectors available. For additional information or questions on custom integrations, please contact your support.



Available Partnerships

An integration partnership is when two SaaS (Software as a Service) companies connect their products by building an app between their systems so that customers can have a smoother, more functional experience while using the two technologies.

For example, Hubspot involves our customers downloading data from our solution into Hubspot. It involves the use of both Reputations solutions and Hubspot paired together!



**Unlock The Power Within
Hubspot**

If your business is looking to manage the following:

Ticketing Systems

Integrate **Actions** with your ticketing and service desk tools, e.g., Zendesk, Salesforce Service Cloud, JIRA.

Data Tools

Feed your Reputation data directly into your cloud data warehouse, BI tools, or customer data platform to understand the impacts of customer sentiment on your business. Examples include Power BI, Domo, and Snowflake.

CRM & Marketing

Solicit feedback using **Surveys** and **Reviews** without leaving your sales and marketing tools, e.g., Salesforce, HubSpot, and ActiveCampaign.

Formatting Best Practices

The formatting functionality allows you to format your data before it is used for integrations within Rep Connect, without changing any source data.

Rep Connect provides multiple functions within Formatting to modify your data. The Edits Made column is available on the Mapping tab within the connector wizard for each of the fields displayed. Once you click on the edit icon, the Formatting Panel opens where you can choose and configure the formatting options for that field.

Formatting options include:

- **Concatenate**—Link multiple text values together in a chain or series with a choice of separator.
- **Find & Replace**—Find a certain value in any column and replace it with any value of your choice.
- **Format URLs**—Format any invalid formatted URLs to a valid formatting.
- **Split**—Split any text value from your data. Save partial text data mapped to any Reputation Field.
- **Static Value**—Specify a static text value for any Reputation Field that you wish to populate regardless of the value present in your data.
- **Lowercase**—Convert any text in your data to lowercase characters.
- **Title Case**—Convert any text in your data to Title Case characters.
- **Uppercase**—Convert any text in your data to Uppercase characters.
- **Dynamic Templates**—Add rules to decide which request templates should be used by Rep Connect to send the review requests.
- **Lookup**—Add a mapping table which can be used as a lookup for a bulk find and replace.

Concatenate

Example Use Case

For a review request integration, you want the full name of your customer to appear in the requests, but your data contains two distinct columns for “First Name” and “Last Name”. Map the Reputation Field “to-name” to a value which is a concatenation of the values from both the “First Name Last Name”.

To set up formatting:

1. Click the **formatting icon** (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Concatenate** from the **Function** dropdown. This will deselect Your Column.
3. Select the columns you wish to concatenate using the dropdown menu displayed.

Note: Concatenate allows you to combine a maximum of three columns.

4. Select the delimiter that you would like to separate the selected columns. Options include:
 - Space ()
 - Comma (,)
 - Semicolon (;)
 - Pipe (|)
5. The resulting value will be displayed for you to review using sample values from each selected column. Optionally check **Ignore if blank** to allow the formatting to ignore any blank data values in the selected columns.
6. Click **Submit** to save this formatting.

Find & Replace

Example Use Case

For a Profile Import Integration, you want to save a certain category as “Physician Family Medical Practice,” but your data contains the “Categories” column where the value is “Physical Family Medicine”. Map the Reputation Field “Categories” to a formatted value of the data in your columns.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Find & Replace** from the Function dropdown.

Note: Ensure your selection in the Your Column dropdown is accurate.

3. In the Find box, type the term that you wish to find.
4. In the Replace With box, type the term that will replace the term in the Find box.
5. The resulting value will be displayed for you to review using a sample value from your selected column. Click Submit to save this formatting.

Note: The Find & Replace function applies to all profiles where the specified rule matches.

Format URLs

Example Use Case

For a Profile Import Integration, you would like to save a well-formatted URL of the profile’s website, but your 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 your column “Homepage”.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.

Note: Ensure your selection in the Your Column dropdown is accurate.

2. From the formatting panel, select **Format URL** from the Function dropdown.
3. The resulting value will be displayed for you to review using sample values from the selected column in your data. Click **Submit** to save this formatting.



Split

Example Use Case

For a Review Request integration, you would like only the First Name of your customer to appear in the requests, but your data contains the column “Full Name”. Map the Reputation Field “to-name” to a value which is a partial text of the value from the “Full Name Column” of your data.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Split** from the Function dropdown. This will deselect Your Column.
3. Select the separator on which you would want to split the text. This will split the text from your column at every occurrence of the separator within the text.
Options include:
 - Space () → selected in the example
 - Comma (,)
 - Semicolon (;)
 - Pipe (|)
4. Select which partial text would you like to use for the mapping. In our example use case, 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
5. The resulting value will be displayed for you to review using sample values from the selected column in your data. Click **Submit** to save this formatting.

Static Value

Example Use Case

For a Review Request integration, you would like all the requests to be sent from the same name “Business Manager”, but your data does not contain any column that would provide this value to be mapped to the Reputation Field “from-name”. Use the formatting function “Static Value” to define this mapping; you do not need to map any of your columns to the Reputation field.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Static Value** from the Function dropdown. This will deselect Your Column.
3. Enter the value and click **Submit** to save this formatting.

Lowercase

Example Use Case

For a Review Request integration, you may have “location-code” in either title case or uppercase and the same location code is stored on the Reputation platform as all lowercase. Use the formatting function “Lowercase” to convert the “location-code” value from your file into all lowercase characters.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Lowercase** from the Function dropdown.
3. The resulting value will be displayed for you to review using sample values from the selected column in your data. Click **Submit** to save this formatting.

Title Case

Example Use Case

For a Review Request integration, you may have customer names all in lowercase in your source data, but you want to display the names in Title Case in the request being sent. Use the formatting function “Title Case” to format this mapping.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Title Case** from the Function dropdown.
3. The resulting value will be displayed for you to review using sample values from the selected column in your data. Click **Submit** to save this formatting.

Uppercase

Example Use Case

For a Review Request integration, you may have “location-code” in either Title Case or Lowercase and the same location code is stored on Reputation platform as all in Uppercase. Use the formatting function “Uppercase” to convert the “location-code” value from your file into all Uppercase characters.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Uppercase** from the Function dropdown.
3. The resulting value will be displayed for you to review using sample values from the selected column in your data. Click **Submit** to save this formatting.

Dynamic Templates



Example Use Case

For a Review Request integration, you may want to send requests using one specific template for email requests and another template for SMS templates. Use the formatting function “Dynamic Templates” to add this rule.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Dynamic Templates** from the Function dropdown.
3. Add criteria using IF/THEN statements to define which template to use for email and SMS. If you intend to use more than one template for either of the channels, you will also need to define the distribution percentage for each template.
4. Click **Submit** to save this formatting.

Lookup

Example Use Case

For a Review Request integration, you may have “store-codes” for all of your locations in your 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.

To setup formatting:

1. Click the formatting icon (the gear icon) next to the field which you wish to format.
2. From the formatting panel, select **Lookup** from the Function dropdown.
3. Choose which lookup table to use from the subsequent dropdown.
4. Click Submit to save this formatting.
5. Once a Lookup Table has been added to the Rep Connect integration, use the formatting function “Lookup” so Rep Connect can map “location-code” to the “store-code” from your source requests data dynamically.

Additional Resources

- *Actions*
- *Admin*
- *Brand Social*
- *Business Listings*
- *Dashboards*
- *Experience*
- *Inbox*
- *Mobile App*
- *Pages & Locators*
- *Reputation Score*
- *Reports*
- *Requests*
- *Reviews*
- *Social Listening*
- *Social Suite*
- *Surveys*
- *Widgets*