Actions

User Guide

Reputation

2024

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Actions Overview

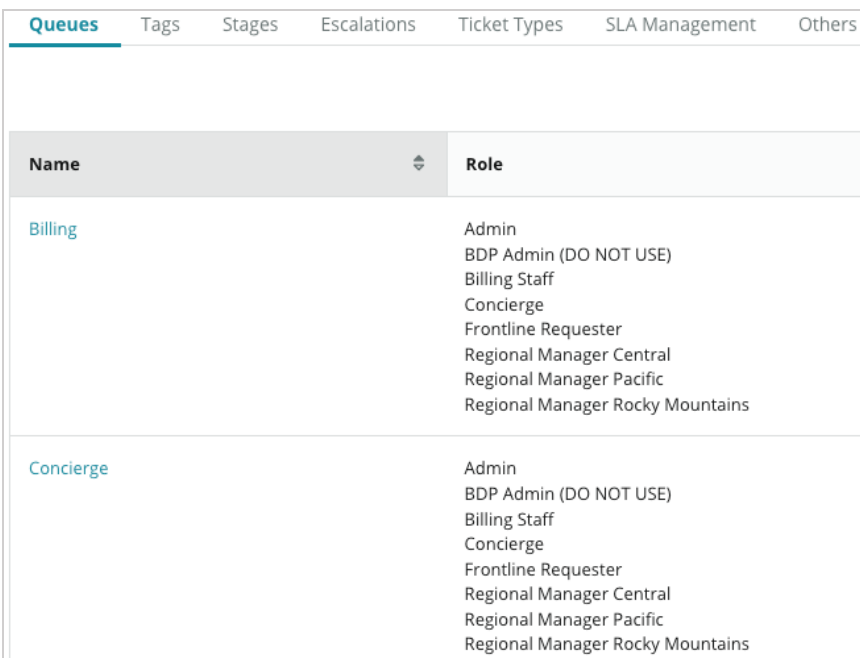
Centralize ticket management and automate workflows with role-based dashboards your team can access at their desk or on the go.

The **Actions** tab displays tickets that have been created from customer feedback and allows your teams to track the resolution timeline for taking action on the feedback. Defining team workflows within Actions ensures a consistent resolution for every issue, no matter in which channel it was received.

Actions Configuration

Before using Actions, you must define your workflow to apply to the ticket details. Workflows refer to the various labels that are used to track a ticket through resolution.

Additionally, you can set automation rules to determine how tickets are created or updated and what labels are applied to the ticket. Defining a targeted set of rules for ticket creation and updates is important to response efficiency.



Name	Role
Billing	Admin BDP Admin (DO NOT USE) Billing Staff Concierge Frontline Requester Regional Manager Central Regional Manager Pacific Regional Manager Rocky Mountains
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Actions Workflow

Regardless of how the ticket is created (automatic or manual), it's important to accurately provide progress updates in the ticket detail. Each ticket includes fields that help describe what the ticket is about, who is working on the ticket, what stage the ticket is in, what the expected resolution time is, and other ticket metadata. These fields and automatic alerts help your team track the activity throughout the resolution process.

Sample Actions Workflow: Confidential Automotive Tenant

1. Collect

Create tickets for:

- Negative reviews
- Reviews with a comment
- Surveys where experience was "Below my expectations"

2. Assign

All tickets are assigned directly to Dealership managers with a due date of 12 days

3. Escalate

Send Dealership managers a reminder email at 4 days

Send Dealership managers an Overdue email at 12 days

4. Resolve

Dealership managers close tickets once responded

Sample Actions Workflow: Confidential Healthcare Tenant

Create Ticket:

- All reviews
- Negative surveys
- Positive surveys with comments: tag tickets with comment as “Contains comment”
- Due Date: 1 day

Escalation Required

Communications team assigns to Member Experience.

Next team is notified via email.

Additional tags can be used to help triage. Internal notes can be made as ticket is worked.

Stages are updated as ticket is worked.

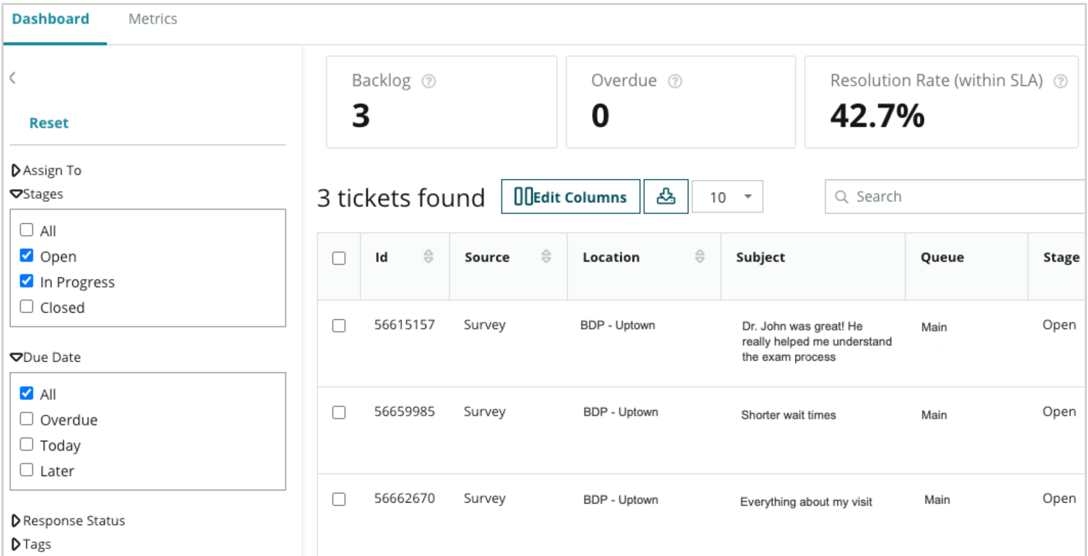
No Escalation Required

Communications team responds to reviews/surveys.

Close the ticket.

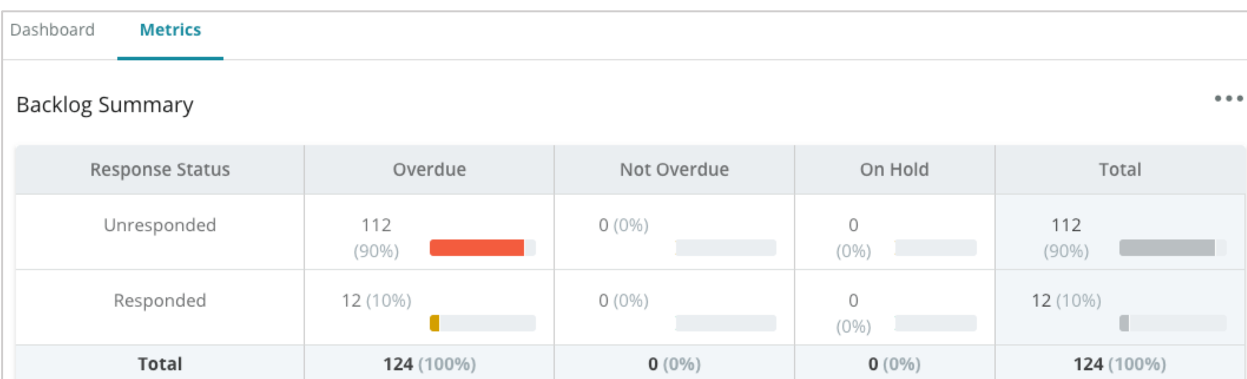
Actions Dashboard

The Actions Dashboard displays all tickets for all locations to which you have access. You can filter, sort, search, and apply bulk actions to tickets. Bulk actions allow you to assign tickets, as well as close, tag, postpone, delete, and more.



Actions Metrics

The **Actions Metrics** tab displays interactive charts and graphs to help you investigate trends in your tickets and team's resolution efforts. Action reports are also available on the Reports tab.



Response Status	Overdue	Not Overdue	On Hold	Total
Unresponded	112 (90%)	0 (0%)	0 (0%)	112 (90%)
Responded	12 (10%)	0 (0%)	0 (0%)	12 (10%)
Total	**124** (100%)	**0** (0%)	**0** (0%)	**124** (100%)

Reputation

Was this guide helpful? Let us know: https://bit.ly/rep-guides

Case Studies

Westfield

Westfield is a group dedicated to providing positive shopping experiences for millions of people in their shopping centers around the world. Westfield came to Reputation with the following needs:

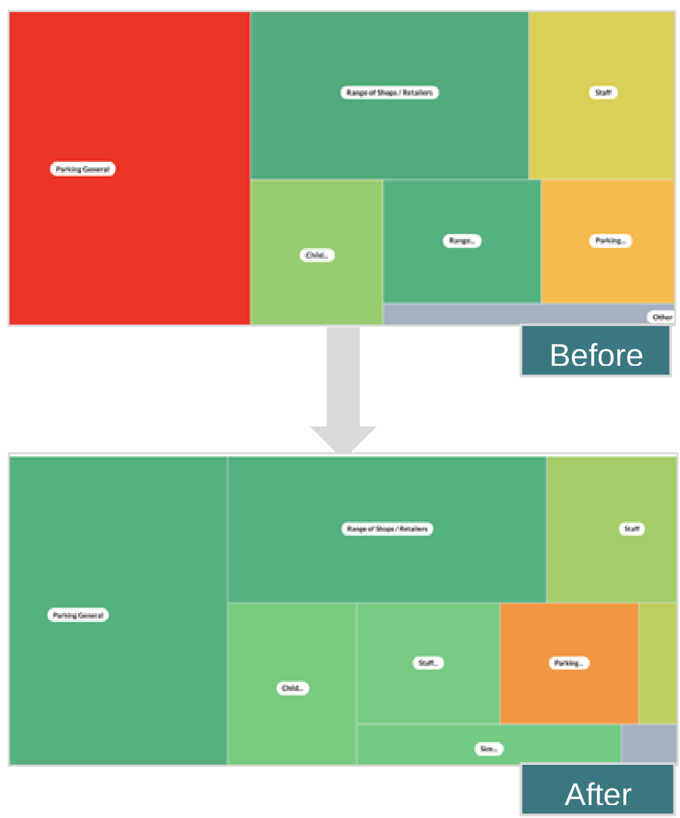
- Full visibility and analysis of the Voice of the Customer across all channels (525 million customer visits per year)
- Ability to track, respond to, and act upon all customer feedback
- Generate insights to inform decision-making for their centers, and their tenant partners within each center
- One platform to provide all capabilities, avoiding the need to custom-build a solution

Actions

1. Reviews and **Social** to see and respond to all customer comments from one place.	**2. Actions** to track and quickly resolve customer issues.	**3. Insights** and **Reputation Score** to benchmark and publish actionable reporting.

Results

- Improved guest experience with 98% of all raised issues from all sources being closed
- Greater visibility into the broader feedback themes impacting the business
- 4.5 times more positive online reviews
- 90% customer response rate (and 100% of support tickets)
- **20% increase in Reputation Score**



Cortland

Cortland is a multifamily real estate investment, development, and management company that in-sources most of its multifamily development, design, construction, renovation, management, and ownership functions—all with the goal of providing residents excellent, hospitality-driven living experiences.

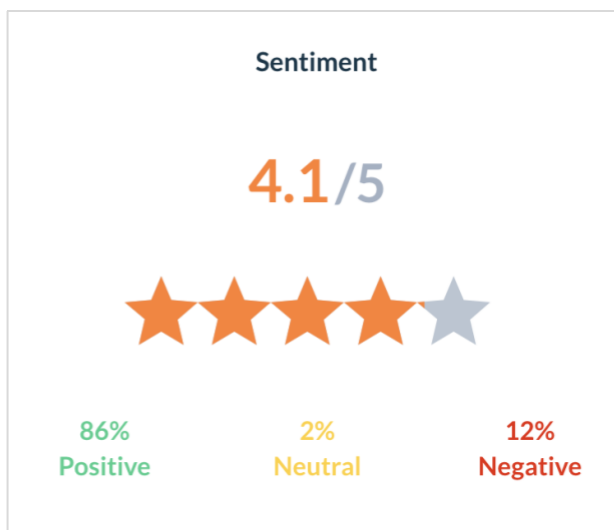
Cortland required a better review management process, wanted to utilize “Contact Us” surveys, and needed a tool to create tickets and follow-up actions.

Actions

1. Added **Reviews** to maintain all feedback in one accessible place.	**2.** Decided to meet stronger SLAs for review response.	**3.** Started creating **Actions** and assigning tickets internally.

Results

- More than 2 times the review volume from the prior time period
- Over 21% increase in response rate
- 16.900+ reviews earned in 2019 to boost ratings
- **Resulted in 4.0+ Star Ratings**



Configuring Actions

Use customizable business rules to build and automate ticketing workflows to ensure the right people are notified immediately when a ticket is created.

Defining Actions Workflows

Workflows refer to the labels that are used to track a ticket through resolution. You can filter tickets using these definitions and use them to build automation rules.

To define your workflow:

1. From the top, right corner of the platform, click **Settings.**
2. From the left navigation, click **Actions.**
3. Using the tabs at the top, set definitions for the following:

Action	Description	Example
Queues	Create queues to choose which "bucket" a ticket belongs to. Certain users (roles) may be responsible for handling the tickets in certain queues.	Brand Experience Customer Service Legal Concierge
Tags	Create tags to describe the ticket contents. You can report on tags to understand the nature of your customer feedback.	Urgent Safety
Stages	Create stages available during a ticket's life cycle as they are passed between queues. Default ticket stages are Open and Closed. You can add, delete, rank, and rename additional stages that support your own internal process. Within each stage, you can put the ticket on hold, which will stop the clock in terms of tracking total resolution time.	Open In Progress Customer Contacted Closed

Action	Description	Example
Escalations	Create escalation labels based on the number of hours a ticket is overdue by or due within.	Overdue By 5 Days Due in 2 Hours
Ticket Types	Create additional context details based on the type of customer feedback.	Type: Accident Management Field: Incident Date
SLA Management	Determines how the ticket resolution rate within the SLA (Service Level Agreement) should be calculated for all locations by keeping a check on ticket targets. Customize the working days and hours to calculate the ticket resolution within the SLA. **Note:** This applies to all locations.	24 x 7 (24 working hours) Monday through Friday: 9am – 5pm
Others	Create additional reasons for closing a ticket and add root causes for further analysis.	Closing Reason Root Cause

Creating Automation Rules

Set automation rules to determine how tickets are created or updated and what labels are applied to the action. Automate follow up requests and set auto respond rules for tickets.

Creating a targeted set of rules for action creation and updates is important to response efficiency. A rule is composed of Criteria and Action.

> **Note:** The actions available are Create Ticket, Update Ticket, Follow-Up Request, and Auto Respond. Before you can set up a ticket rule, you must set up ticket definitions (see above), follow-up request templates, and/or response macros.

Action: Create Ticket

You can configure automation rules for ticket creation for either of the following sources: Surveys or Reviews.

To create a ticket creation rule:

1. From the top, right corner of the platform, click **Settings.**
2. From the left navigation, click **Automation.**
3. Click **Create Rule.**
4. Select the appropriate trigger.
5. Enter a name for the rule (e.g., Reviews for Legal Team)
6. Add the **criteria** (one or more) that will be used as triggers and a follow-up action.
    a. **Review**

    Choose from the following criteria and follow up actions associated with the new rule.

Criteria	Description
Location	Select specific locations from which comments originated (equal to/not equal to), City, or State.
Code	Group by Location Code.
Attributes	Attributes (custom filters such as location types, region, department, etc.).
Source	Choose the data source of the customer feedback (equal to/not equal to).
Sentiment	Choose the overall sentiment of the customer feedback (equal to/not equal to).
NPS	Choose a Net Promoter Score of the customer feedback (equal to/not equal to).
Comment (Text)	Specify keywords to look for within the review or survey comment (contains case sensitive/does not contain case sensitive). Separate multiple keywords with commas.
Comment Length	Set a minimum comment length in characters for the review or survey comment (greater than/greater than equal/less than/less than equal).
Survey Response	Specify keywords to look for within the survey comment (contains case sensitive/contains). Separate multiple keywords with commas.
Reviewer Name	Specify the name of the person leaving feedback (equal to/not equal to).

Criteria	Description
Rating Updated	Specify if the rating provided on a review has been updated (equal to).
Published	Specify if the underlying review has been published to the source
Flagged	Specify if the underlying review has been flagged
System Tags	Specify if the underlying review has any system tags

Follow Up Actions include: Create Ticket, Follow Up Request, and Auto Response.

b. Review Response

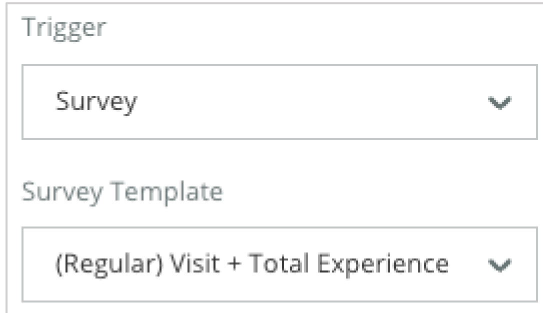
Choose from the following criteria and follow up actions associated with the new rule.

Criteria	Description
Location	Select specific locations from which comments originated (equal to/not equal to), City, or State.
Code	Group by Location Code.
Attributes	Attributes (custom filters such as location types, region, department, etc.).
Response State	Select specific response state of the review (such as - Published , Pending approval etc.)

Follow Up Actions include: Update Ticket.

c. Survey

Select the **Survey Template** from the dropdown before setting your criteria.



Choose from the following criteria and follow-up actions associated with the new rule.

Criteria	Description
Location	Select specific locations from which comments originated (equal to/not equal to), City, or State.
Code	Group by Location Code.
Attributes	Attributes (custom filters such as location types, region, department, etc.).
Sentiment	Choose the overall sentiment of the customer feedback (equal to/not equal to).
Comment	Choose the keywords present in the survey comment (open text box answer)
Question	Choose to create a ticket when specific answers are provided to specific questions in your survey (equal to/not equal to)
System Tags	Choose whether the survey has specific system tags defined in the tags module
Re-opened	This will get initiated if the ticket with the underlying survey has been closed and reopened at least once

Follow Up Actions include: Create Ticket, Follow Up Request, and Auto Response.

d. Ticket Custom Field(s)

Choose from the following criteria and follow up actions associated with the new rule.

Criteria	Description
Location	Select specific locations from which comments originated (equal to/not equal to), City, or State.
Code	Group by Location Code.
Attributes	Attributes (custom filters such as location types, region, department, etc.).
Escalation	Choose the exact escalation type defined in the Escalation tab in the Actions module
Queue	Select the exact Queue name
User	Select the exact User name
Stage	Select the exact Stage name
Ticket Type	Select the exact Ticket type defined in the Ticket Type tab in the Actions module
Tags	Select the exact ticket tag(s)
Responded	Select if the ticket has been responded or not
Re-opened	This will get initiated if the ticket has been closed and reopened at least once

Follow Up Actions include: Update Ticket and Survey Request.

e. Message

Choose from the following criteria and follow up actions associated with the new rule.

Criteria	Description
Location	Select specific locations from which comments originated (equal to/not equal to), City, or State.
Code	Group by Location Code.
Attributes	Attributes (custom filters such as location types, region, department, etc.).
Escalation	Choose the exact escalation type defined in the Escalation tab in the Actions module
Queue	Select the exact Queue name
User	Select the exact User's name
Stage	Select the exact Stage name
Ticket Type	Select the exact Ticket type defined in the Ticket Type tab in the Actions module
Tags	Select the exact ticket tag(s)
Responded	Select if the ticket has been responded or not
Re-opened	This will get initiated if the ticket has been closed and reopened at least once

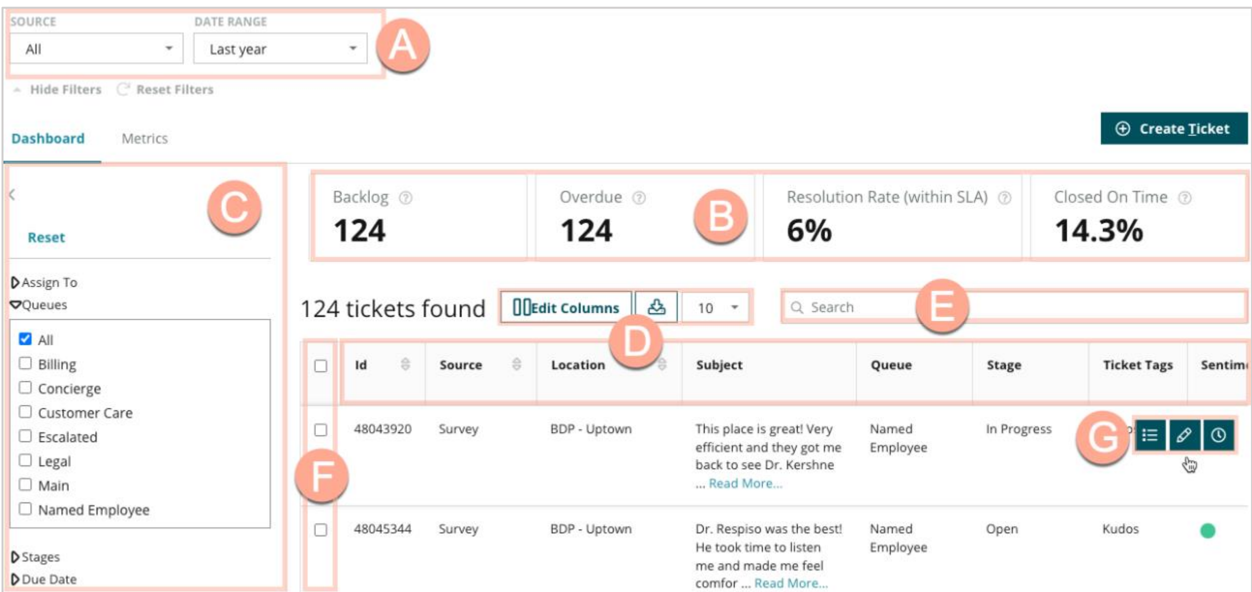
Follow Up Actions include: Assign User, Assign Role, Mark Conversation, and Set Due Date.

7. Click **Save.**

Using the Actions Dashboard

Use the Actions Dashboard to display tickets created from customer feedback and take action on them.

The **Actions Dashboard** displays all tickets for all locations to which you have access.



Match each letter to the corresponding feature in the above image with the ledger on the following page (page 17).

Match each letter to the corresponding feature in the image with the ledger on the previous page (page 16).

A	**Top Line Filters**	Use the top line filters to adjust date range, review source, or other custom filters. If you have multiple locations, you can also use the filter to view tickets by location. These filters persist as you navigate to different screens in the platform.
B	**Ticket Summary**	View statistics about your team's progress in resolving tickets, given the top-line or side filters selected See Actions Metrics for more information.
C	**Side Filters**	Use the left side filters to narrow the list of tickets by **Queue**, **Stage**, **Due Date**, **Response Status**, **Tags**, **Sentiment**, **Channel** (Review, Survey, Manual, Email, Fix Credentials), or **Ticket Type**. Additionally, you can view All Tickets or sort by tickets assigned to specific users by using the **Assign To** filter. To change any of the filter options, see Configuring Tickets.
D	**Editable and Sortable Columns**	Click to sort the ticket results by **ID, Source, Location, Sentiment**, **Last Updated**, and **Due Date**. Edit columns to hide columns that do not apply to your workflow. Export all tickets in the dashboard view.
E	**Search Bar**	Search for tickets that contain keywords within the ticket, including name, email, etc. Limit search queries to less than 20 characters for accurate and fast results.
F	**Bulk Ticket Actions**	Select the checkbox next to one or more tickets to perform a bulk action. Actions include: **Assign**, **Close**, **Tag**, **Export Selected, Set Stage, Assign, Postpone,** and **Delete.** See Working with Tickets for more information.
G	**Quick Actions Menu**	Hover over a ticket to take action without clicking into the ticket detail. Actions include: **Assign**, **Set Stage**, **Postpone**.

Working with Actions

Ensure customer satisfaction by tracking all actions related to a ticket in one place to create transparency and accountability.

Each ticket includes fields that help describe what the ticket is about, who is working on the ticket, what stage the ticket is in, what the expected resolution time is, and other ticket metadata.

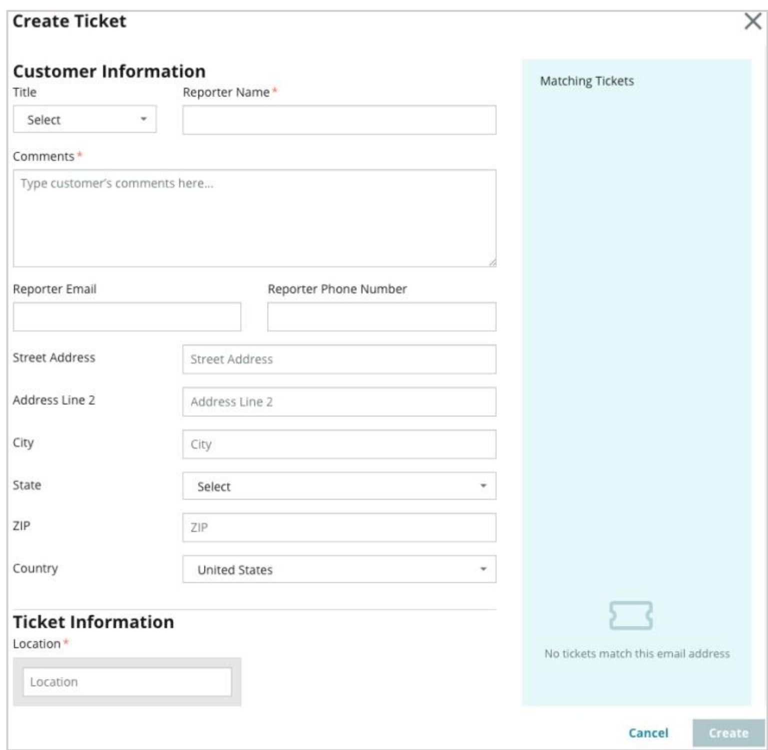
These fields help your team track the activity throughout the resolution process.

Note: Consider creating specific roles for users who are working with tickets. For example, frontline staff can update tickets, but only managers can close tickets.

Creating a Ticket

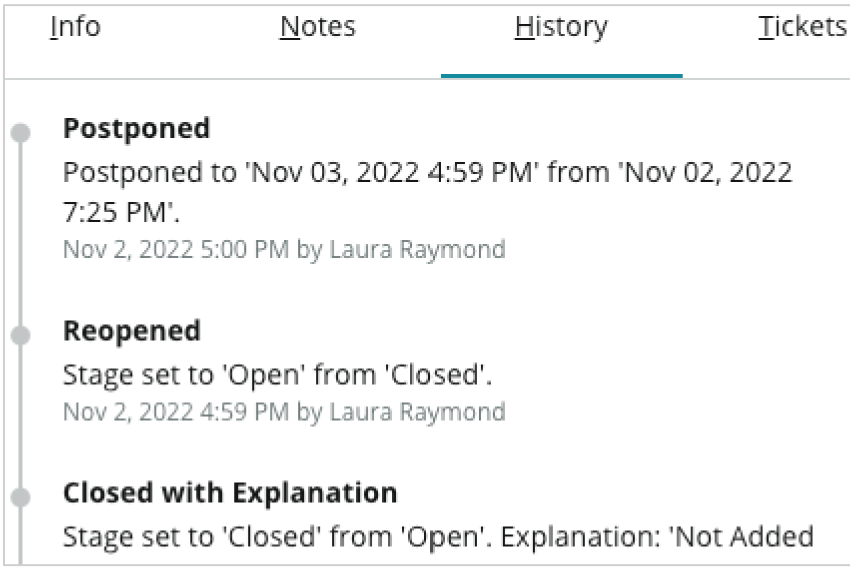
The platform supports these methods for ticket creation:

- **Automatic** – Tickets are generated according to configuration rules or integration (phone call, email, letter).
- **Manual** – Tap the plus icon in the Reputation Mobile App under the **Actions** tab.
- **Manual** – Click the **Create Ticket** button from the Actions Dashboard.

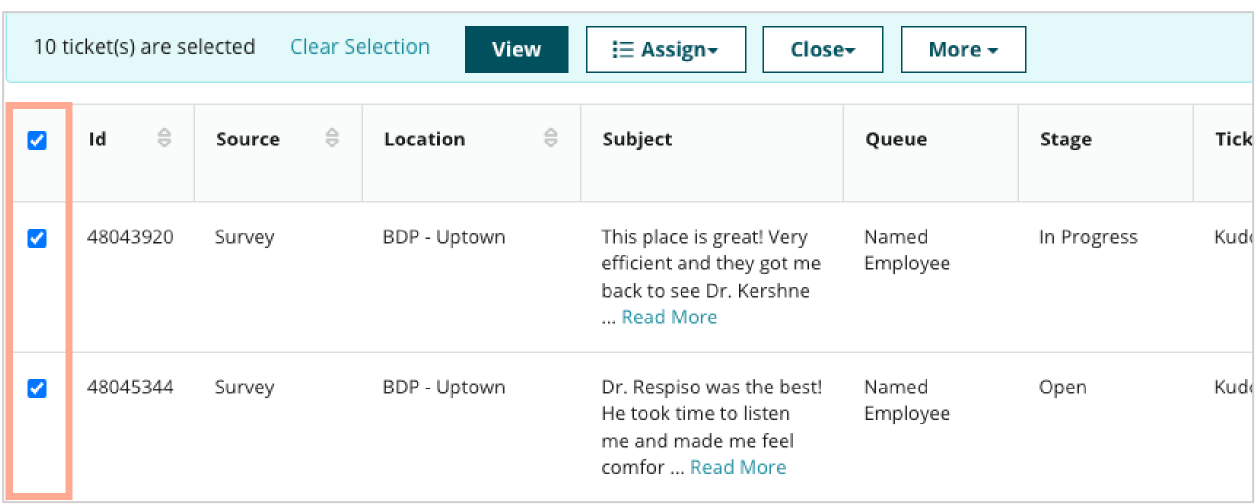


Updating a Ticket

Because multiple people may touch a ticket, it's important to accurately provide progress updates in the ticket notes. Anytime a ticket is updated, the activity is automatically logged under the **History** tab, which helps you understand the full life-cycle of the ticket by reviewing who took each action and when.



> **Note:** To apply bulk updates to tickets, use the checkboxes on the Actions dashboard.

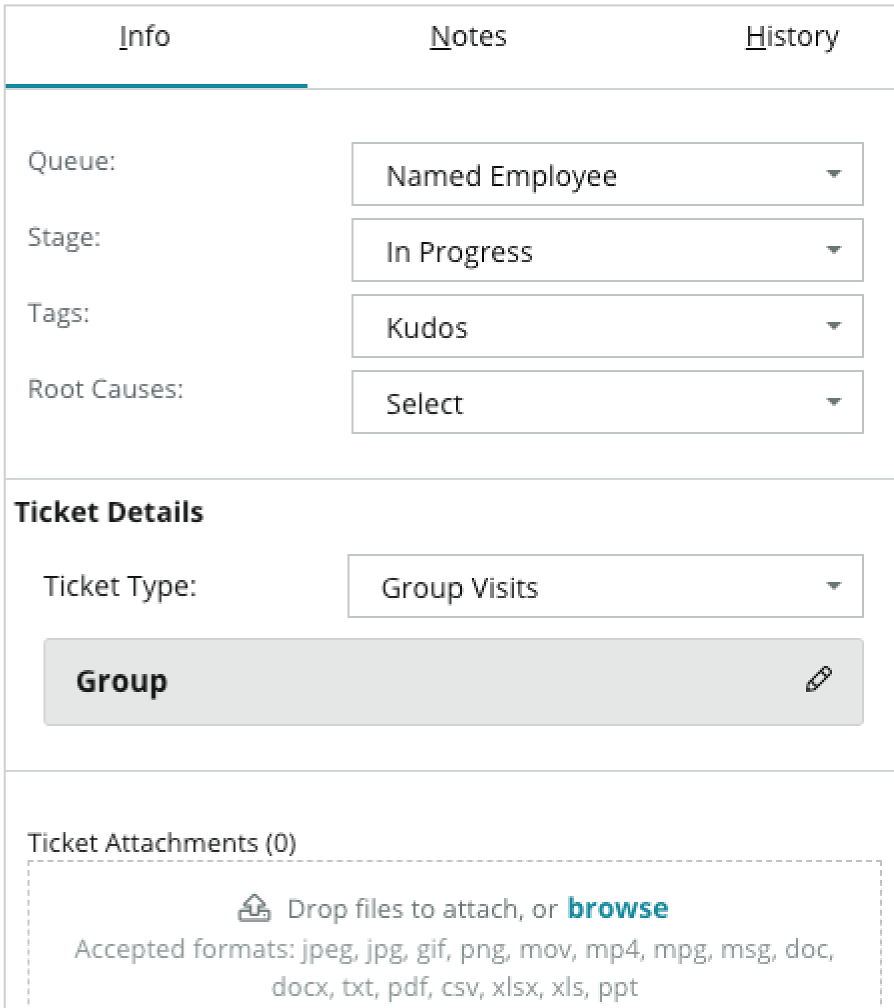


Changing Ticket Status

The **Info** tab on the Ticket Detail includes Queue, Stage, Tags, Root Causes, and Ticket Type (if any).

To change ticket status:

1. From the Actions dashboard, click a ticket to open the detail.
2. On the **Info** tab, update the Queue, Stage, Tags, Root Causes, or custom fields. You can also upload attachments as needed.



Note: Hover over a ticket in the Actions Dashboard to activate the quick actions menu to assign queue, change stages, and postpone tickets.

Adding Ticket Notes

The **Notes** tab on the Ticket Detail allows you to collaborate internally with your team. *Notes are not visible to customers.*

To change ticket status:

1. From the Actions dashboard, click a ticket to open the detail.
2. On the **Notes** tab, add a note to reflect the latest action.

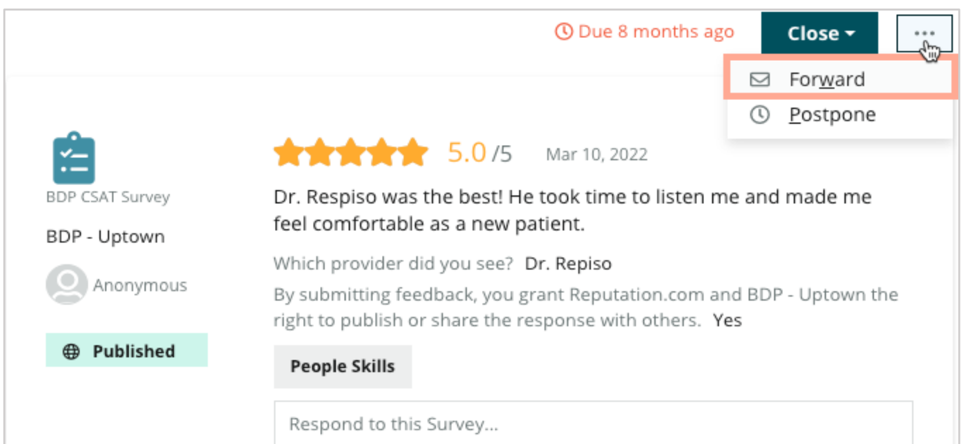
> **Note:** You can also add notes to a ticket from your inbox when you reply to an automated message that was generated by a "New Ticket" or "Ticket Updated" notification.

Forwarding Tickets

Forwarding a ticket allows you to send the ticket details to other users via email.

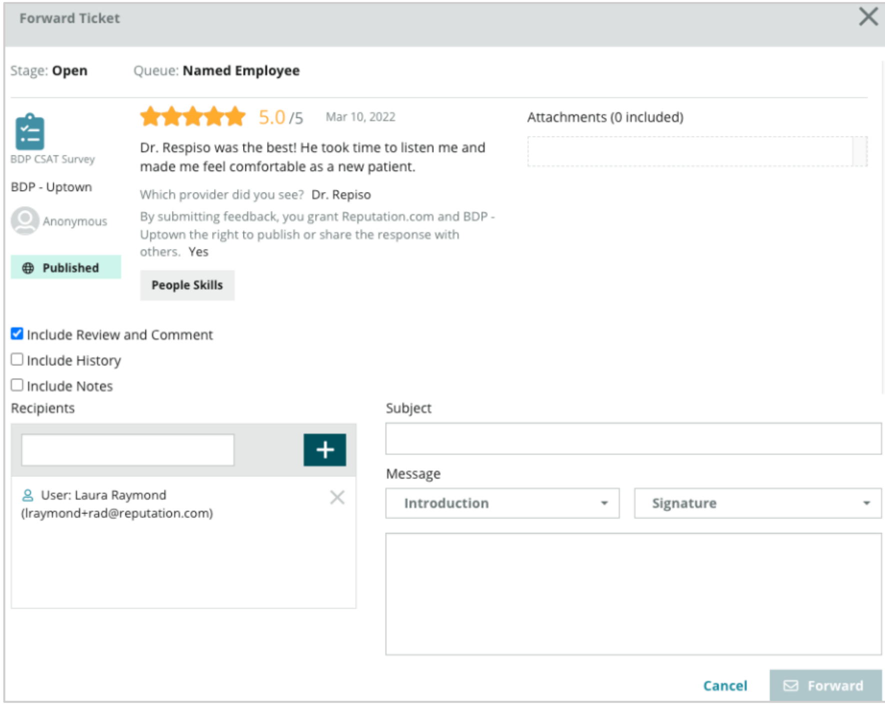
To forward a ticket:

1. From the Actions dashboard, click a ticket to open the detail.
2. Click the ellipsis and click **Forward.**



3. Enter the recipient(s)'s email address(es), platform username, or a platform role, subject, and message.

4. Include the review, history, and/or comments in your email.



5. Click **Forward.**

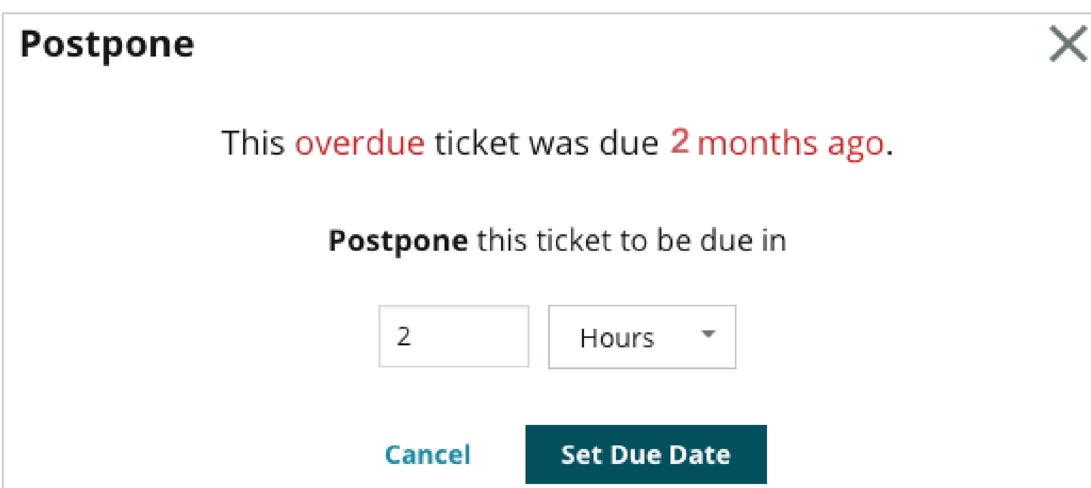
   The ticket details will be sent via email to all recipients.

Changing the Due Date

Postponing a ticket allows you to set a new due date for the ticket.

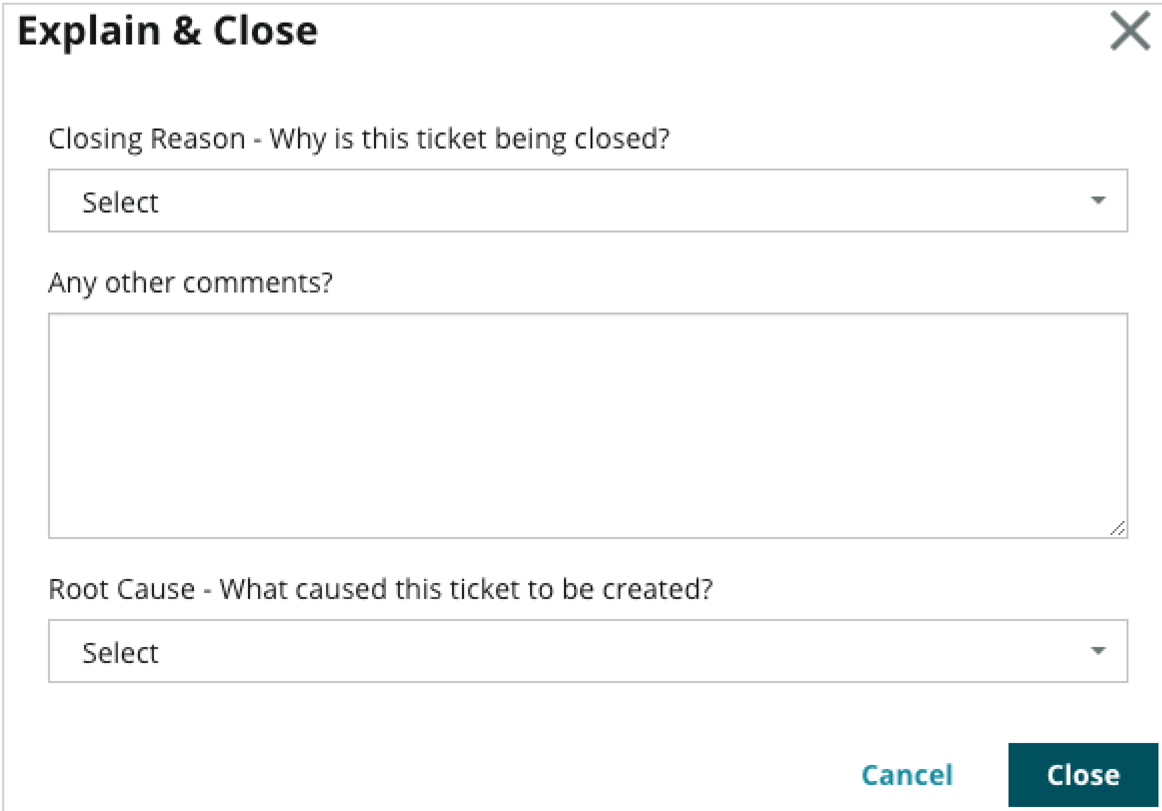
To postpone a ticket:

1. From the Actions dashboard, click a ticket to open the detail.
2. Click the ellipsis and click **Postpone.**
3. Enter the number of hours, days, weeks, or months to postpone the ticket by.
4. Click **Set Due Date.**



Closing Tickets

When a resolution was provided and accepted, click the **Close** button to add an item to the log and automatically set the ticket stage to Closed. If you'd like to provide an explanation (closing reason, comments, root cause, etc.) click **Explain & Close.**



Using Ticket Alerts

Ticket email, mobile push notification, and platform notification tray alerts are available to trigger each time a ticket is created and/or one of these fields is updated:

- Escalation
- Stages
- Queues
- Tags
- Comments
- Attachment (added/removed)

Viewing Actions Metrics

Use Actions Metrics to help you set internal KPIs for your ticket activity.

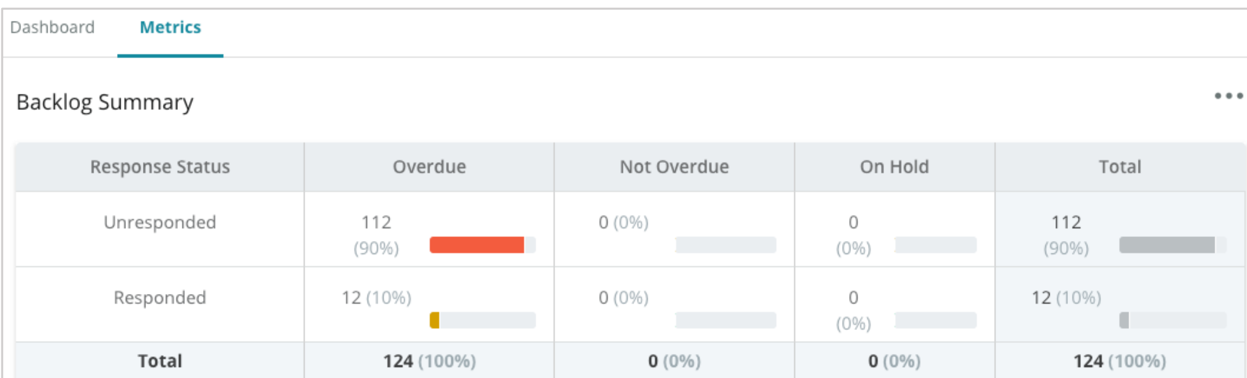
The **Actions Dashboards** tab provides a high-level overview of top metrics. The **Actions Metrics** tab displays interactive charts and graphs to help you investigate trends in your tickets and team's resolution efforts. Ticket reports are also available on the **Reports** tab.

- Use the top=line filters to change the data in the charts.
- For any of the charts, click the **ellipsis** to view additional options for downloading charts to PDF, automating scheduled emails, or forwarding the data via emails.

Actions Dashboard Tab

Metrics Summary

View statistics about your team's progress in resolving tickets.



Response Status	Overdue	Not Overdue	On Hold	Total
Unresponded	112 (90%)	0 (0%)	0 (0%)	112 (90%)
Responded	12 (10%)	0 (0%)	0 (0%)	12 (10%)
Total	**124** (100%)	**0** (0%)	**0** (0%)	**124** (100%)

Metric	Description
Backlog	Number of tickets that have not been closed.
Overdue	Number of open tickets in the backlog that are past their due date.
Closed On Time	Percentage of tickets closed before the SLA was breached.

Actions Metrics Tab

Backlog Summary

View the number of tickets in the backlog that are Overdue/Not Overdue/On Hold and that are Responded/Unresponded. Tickets that are Overdue and Unresponded should be addressed first, whereas tickets that are Not Overdue and Responded are less urgent.

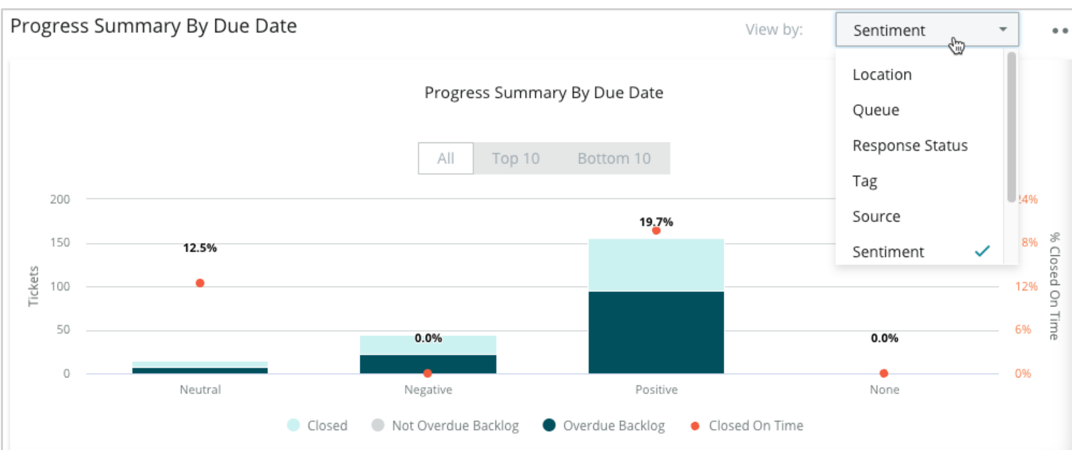
Backlog Summary

Response Status	Overdue	Not Overdue	On Hold	Total
Unresponded	5 (6%)	0 (0%)	0 (0%)	5 (6%)
Responded	85 (94%)	0 (0%)	0 (0%)	85 (94%)
Total	**90** (100%)	**0** (0%)	**0** (0%)	**90** (100%)

Progress Summary by Due Date

Progress Summary By Due Date provides clarity on your team's performance. Use the "View by" filter to slice the chart by Location, Queue, Response Status, Tag, Source, Sentiment, or custom filter.

The graph shows the number of tickets in the closed, not overdue backlog, and overdue backlog buckets, as well as the percentage of tickets closed on time based on the "View by" factor selected (example: Sentiment).



Click **Show Table** to expand the data in a tabular format based on the "View by" factor selected (example: Queue).

Hide Table

Sentiment	Overdue Closed	Closed On Time	Not Overdue Backlog	Overdue Backlog	% Closed On Time	Total
Negative	22	0	0	22	0%	44
Neutral	7	1	0	7	12.5%	15
None	0	0	0	0	0%	0
Positive	49	12	0	95	19.7%	156
Total	**78**	**13**	**0**	**124**	**32.2%**	**215**

Complaints

Review the number of complaints (non-positive customer feedback) in the backlog, the average number of days to close a complaint, the number of days since the last complaint, and the date/age of the oldest outstanding complaint based on the "View by" factor selected (example: Response Status).

Complaints

Queue	Complaints	Average Days to Close Complaint	Days Since Last Complaint	Date of Oldest Outstanding Co
FYI	87	18.2	4	01/17/22

Note: You can also view metrics in the Reports tab by expanding the Actions category.

Premium Paid Services

Put our Premium Paid Services platform experts to work for you.

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 guarantee 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.

Additional Resources

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

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

