

# Admin

## User Guide

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# Admin Overview

Manage your account settings and maximize the platform experience for users at scale.

All platform users are assigned various roles. Roles determine which menu features are available, the locations you can access, and the permissions within administrative settings. You can access administrative settings from the gear icon in the top, right corner of the platform.

"The following administrative settings are available to all Reputation platform users out of the box; role permissions can be adjusted to hide certain functionality"

Setting	Description
My Account	Settings for your profile: General Information (authorized locations) and Notifications (email, summary).
General Settings	Settings for your company profile: Company Information, Logos, Filters, Messaging, and API.
Locations	Settings for each location: General Information, Pages, Logos, Competitors, Kiosk, Messaging, and Syndication.
Users	Settings for additional users in the tenant.
Roles	Settings for groups of permissions that apply to user profiles, including Notifications.

**Note:** Depending on your own role and the features enabled for your tenant, you may have an assortment of additional features. Refer to page 21 for more information.

# My Account

The **My Account** tab within the platform's Admin settings includes your general information and the opportunity to customize your notifications.

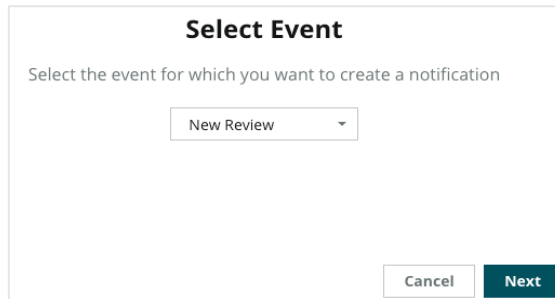
## Configure Your Notifications

You can configure your own notifications or modify the properties of notifications that have been set up for you by an administrator.

**Note:** Refer to page 21 for more information on how to set notifications at the role level.

### To configure your own notifications:

1. Click **Settings** from the upper right corner of the platform.
2. From the Admin menu, click **My Account**. Then click **My Notifications**.
3. From Notification Settings, click **Create Notification**.
4. From the Select Event dropdown, choose the event for which you want to create an alert.
5. Click **Next**.



**Select Event**

Select the event for which you want to create a notification

New Review

Cancel Next




6. Modify the notification settings. Settings vary depending on alert type. *Not all settings are listed here.*
  - Rule Name – Set a name for the notification to help you identify it in your list.
  - Channel – Channel availability may vary: Email, Mobile Push Notification, Platform Notifications Tray.
  - Frequency – The frequency with which to receive the alert: Immediate, Daily, Weekly, Monthly. Immediate sends emails each time the notification process finds one or more items that meet the conditions. All other options send a digest email according to the selection.
  - Group Similar Emails – Group similar notifications generated in the same timeframe into one email. Selecting “No” sends individual emails for each event (new review, new simple survey, new Q&A).

- **Email Subject** – Choose the subject line of the email when it arrives in your inbox. Inserting variables allows you to identify the source, location, or other information about the ticket to help manage/group multiple alerts arriving in your inbox.
- **Email Custom Message** – Enter verbiage to add to the beginning of the email, which can be used to set context for why the alert was sent or what the expectation is for taking action.
- **Alert For** – Receive alerts for all locations (click All), or select individual locations. If you have more than one Alert For filter option, your account has custom filters, which allows you to choose custom segments to associate with the alert.
- **Sources** – Receive alerts for all sources associated with your account (click All), or select individual sources.
- **Sentiment** - Receive alerts for All, Positive, Negative, Neutral, or Unrated feedback.
- **Show Responses** - Toggle off to view solely the reviews within the notification, or toggle on to see the review and its corresponding response, if available.

## 7. Click **Save**.

The alert becomes active and will notify you via the selected channel(s) and frequency when the notification conditions are triggered. You can also disable the alert or edit, copy, and delete.

**Note:** The available events depend on the features of the platform you have access to.

Name	Mode	Frequency	Status	Actions
New Review	Email	Immediate	<input checked="" type="checkbox"/>	  

## Notification History

Within the Notification Settings, scroll down past the configured alerts to view the historical log of each notification.

Notification History			
Notification Setting	Subject	Sent	Channel
Social Post Approval		Fri, December 16th 2022, 11:09:02 am	InApp
Social Post Approval		Fri, December 16th 2022, 11:09:01 am	Push
Social Post Approval	Post pending approval	Fri, December 16th 2022, 11:09:01 am	Email

# General Settings

Explore tenant-level settings to understand the foundation for your account capabilities.

The General Settings tab within the platform’s Admin includes settings for your company profile: Company Information, Logos, Filters, Messaging, and API.

**Note:** Use the **Edit** button to edit where applicable. Most settings are view only.

## Company Information

These settings are configured by the Reputation team when your account is first created. They are View Only. Not all settings are listed here.

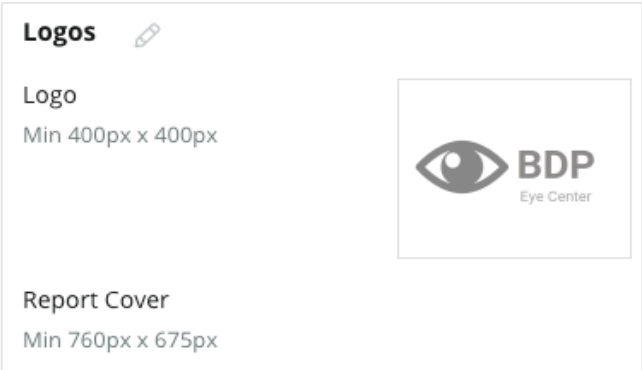
Setting	Description
Company Name	Name of your company profile as it is listed in the Reputation platform.
Company Type	Type of your company profile (e.g., Enterprise, SMB).
Agency	The tenant group for your account.
Industry	The industry category that most closely matches your company. This selection is used for benchmark reporting in Reputation Score and Insights. Sources enabled for your account may also depend on your industry selection.
Managed By	The agency that manages your company's account (Reputation if no agency).
Module	The platform modules enabled for your account.
Source Groups	The sources enabled for your account.
Default Filter Range	The default date filter for logged in users.

## Logos

A logo is required within your tenant profile. A logo appears in the top left corner of the platform, within Reports, and in email notifications. You can override the company logo on a per-location basis.

*To add a company logo:*

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **General Settings**.
3. Click the **Logos** tab.
4. Click **Edit**.
5. Upload a logo that has dimensions at least 400x400px or 760x675px for reports.



## Filters

Default filters allow logged in users to focus the onscreen data (if applicable) based on the following:

- state
- city
- location
- source
- date range

If you have custom filters enabled, they are also listed on this tab, denoted by underscores before and after (e.g., `_zone_`, `_brand_`). Custom filters are View Only.

Filters		
Filters	1. State	state
	2. City	city
	3. Location	location
	4. Zone	<code>_zone_</code>
	5. Brand	<code>_brand_</code>
	6. Source	source
	7. Date Range	date



## Messaging


A location From Name/Email are used in survey replies (customers) and other platform notifications (users). You can override the company Name/E-mail on a per-location basis if needed.

**Note:** Most review/survey request templates require a location-specific From Name and Email.

Default is Reputation.com ([noreply@reputation.com](mailto:noreply@reputation.com)).

### To add a From Name/Email:

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **General Settings**.
3. Click the **Messaging** tab.
4. Click **Edit**.
5. Add the location from and email, and click **Save**.

Messaging 	
From Name	BDP
From Email	info@bdp.demo
Alert Email Message	Please respond within 48 hours.
Summary Email Message	<p>&lt;h3&gt;-DID YOU KNOW?-&lt;/h3&gt;</p> <p>A common question we get is the review response process.</p> <p>This helps keep your time clear, makes sure all customers a</p>

**Note:** Alert Email Message/Summary Email Message allow you to pre-pend text (HTML supported) to all \*user\* email notifications that originate from the tenant level.

## API

View API settings for your tenant:

- **Enabled** – API key and default properties set at the time of configuration.
- **Single Sign On Enabled** – Allows your users to log into the platform using credentials from another platform.

API	
Enabled	OFF
Single Sign On Enabled	OFF

# Locations

Manage location-level settings for your tenant.

The **Locations** tab with the Platform Admin includes settings for each location profile within your tenant: General Information, Pages, Logos, Competitors, Integrations, Messaging, Social, and Syndication.

- A tenant represents a company (e.g., brand, headquarters).
- A location represents each rooftop (e.g., store) or person (e.g., physicians, loan officers, etc.) that belongs to that company.

**Note:** If you are looking to add, edit, or remove listing profiles for various locations, this is done in the **Listings** solution under Profiles.

Small businesses often have one or two locations, while enterprise businesses could have hundreds or thousands of locations within a single tenant. New locations can be added into your tenant one-by-one within Platform Admin, or they can be bulk imported via the Support team.

## General Information

The **General Information** tab shows basic details about the location.

**Note:** Some of the location information within this section may be used to build the initial rooftop or provider "profile" that's managed within the Listings tab of the platform (e.g., Address, Phone, Email, etc.); however, once the associated profile is created, edits to General Information are not also cascaded to the profile.

The following information is available for each location. Settings at the location level override any related settings at the tenant level.

Setting	Description
<b>Public Location Name</b>	Name shown to the public (e.g., BDP Uptown).
<b>Internal Location Name</b>	Name used internally to distinguish between locations (e.g., BDP - Uptown - AZ). Must be unique.
<b>Location Code</b>	Unique code for the location.
<b>Location UID</b>	System generated unique identifier for the location
<b>Location Key</b>	System generated unique key for the location
<b>Program</b>	Added by the client to associate the location to any particular business program in the company.
<b>Unique Program Code</b>	Unique identifier for the program added by the client to associate the location with any of their business programs.
<b>Address</b>	Physical address for the rooftop or provider. May also be used to validate the Listing Accuracy component within Reputation Score if you're not using the platform for Listings management.
<b>Time Zone</b>	Time zone used for scheduled report delivery.
<b>Phone Number</b>	Phone used within response macros. May also be used to validate the Listing Accuracy component within Reputation Score if you're not using the platform for Listings management.
<b>Website</b>	Website used to validate the Search Impression component within Reputation Score. May be used to validate the Listing Accuracy component within Reputation Score if you're not using the platform for Listings management.
<b>Primary Contact Name</b>	Used for response macros, so ensure this is customer-facing.



Setting	Description
<b>Primary Contact Email</b>	Used for response macros, so ensure this is customer-facing. This address can be an alias that goes to several people or one contact.
<b>Support Phone</b>	Customer Support phone number for that location. This is not used currently in the platform. Earlier it was used for SMS Opt-In Help messages. However, it was deprecated since the messaging platform we use does not support customized Help text messages.
<b>Support Email</b>	Customer Support Email address for that location. This is not used currently in the platform. Earlier it was used for SMS Opt-In Help messages. However, it was deprecated since the messaging platform we use does not support customized Help text messages.
<b>SKUs</b>	Any particular pricing SKUs associated with the location.
<b>Industry</b>	Maps to the Reputation Score when comparing industry-average and best-in-class (i.e., compare pediatricians to other pediatricians, not pediatricians to hospitals).
<b>Managed By</b>	Identifies whether the location is managed by the client itself, Reputation, or an Agency. This is typically set at company level and within the location, you can set the name of the person who manages that particular location.
<b>Request Review/Drip Enabled</b>	Drip Campaigns enable sending a “reminder” email/SMS to customers who previously received a feedback or review request but didn't actually leave their feedback or review. This configuration allows you to turn on/off drip campaigns for review requests for that location
<b>Custom Filters</b>	If using custom filters, define values for this location here.
<b>Custom Variables</b>	Define custom variables and their associated value that can be used in throughout the platform, e.g., Review requests, response macros etc.

## Pages

A location needs to have URLs entered into the platform in order to collect data from various websites. The **Pages** tab shows active connections to each of the location's third-party pages (sources).

### *To add a missing URL to a location:*

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Locations**.
3. From the list of locations, click on a location record.

**Note:** In order to enable responding to reviews for sources such as Google Business Profile pages, you will need to establish a connection. Refer to page 25 for more information.

4. Click the **Pages** tab.

The list of connected URLs is at the top. The list of sources that are missing URLs are shown at the bottom.

5. Click the Plus (+) next to the source you want to add.
6. Enter the location's unique URL for that source, and then click **Add**.

The source is added with a "Pending collection" status. Collection for most sources occurs every 24 hours. Some sources with a connection enabled (e.g., Google, Facebook) can occur in near real-time.

**Note:** The Autofind URLs button invokes a process for the system to scan for matching URLs on the web to add automatically. The Autofind process may take 24 hours, depending on the queue. When the process is complete, you'll see a last collection time/date next to each page. Some pages might not exist, and therefore can't be added manually or by Autofind.

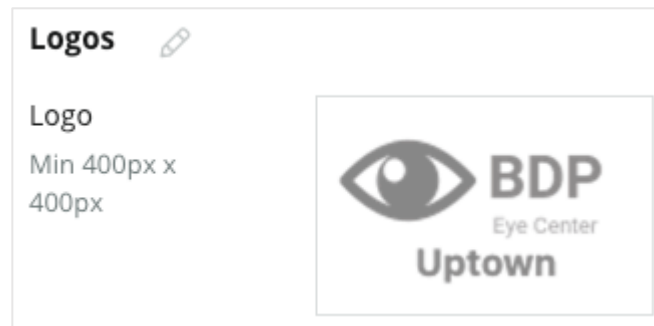
For additional information on Autofind, take a look at our Support article: <https://bit.ly/3IOIxaV>.

## Logos

A logo appears in the top left corner of the platform, within Reports, on surveys, in review requests, and in email notifications, which is important to note if you manage multiple brands. The Logos tab allows you to override the company logo.

### To add a location logo:

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Locations**.
3. From the list of locations, click on a location record.
4. Click the **Logos** tab.
5. Click **Edit**.
6. Upload a logo that has dimensions at least 400x400px or 760x675px for reports.



## Competitors

This legacy competitive reporting allows each location to specify specific competitor locations and associate them with a national brand (if applicable). Alternatively, Reputation's newest Competitive Intelligence solution is set up in a second tenant.

## Messaging

Most review / survey requests require a location-specific From Name/Email. Additionally, the From Name/Email is used in survey replies. The **Messaging** tab allows you to override the company Name/E-mail. Default is Reputation.com (noreply@reputation.com)

### *To add a From Name/Email:*

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Locations**.
3. From the list of locations, click on a location record.
4. Click the **Messaging** tab.
5. Click **Edit**.
6. Add the location from and email, and click **Save**.

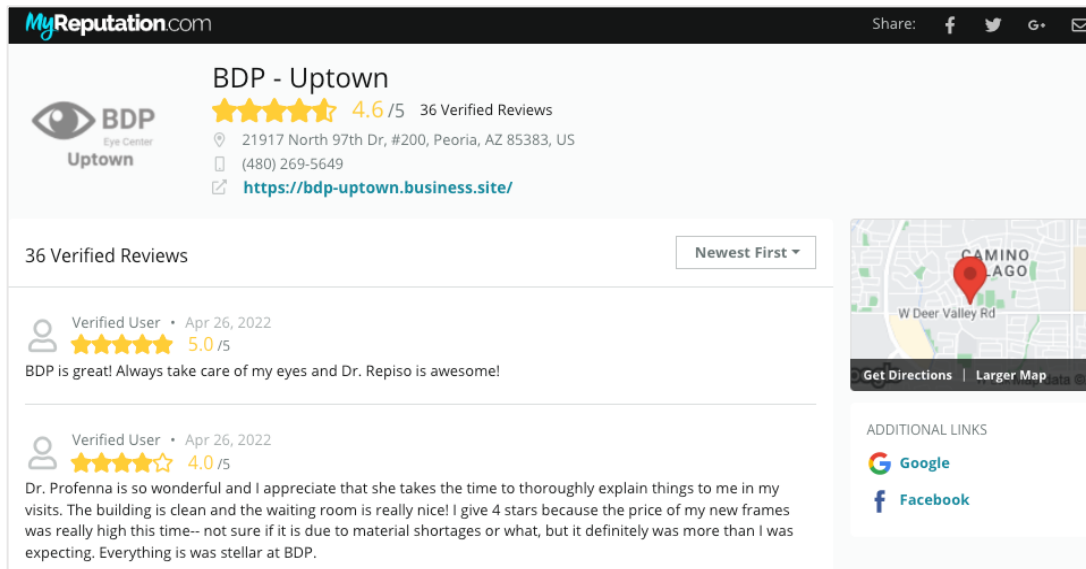
<b>Messaging</b> 	
From Name	BDP - Uptown
From Email	bdpsandiego@gmail.com
Use for Internal Emails	<b>OFF</b>

## Syndication

Search engines particularly like to see unique pages for each of your locations. The **Syndication** tab allows you to modify the details of the “My Reputation.com” page for this location. This page and unique URL is automatically provided for each location, and it serves as another source of traffic to promote your business.

Default options for page syndication include:

- Testimonial Page URL
- Name, Star Rating, Address
- Map with links to Google and Facebook listings (if available)
- Ratings generated from simple survey requests.



Additional settings include:

- Request Appointment button. (Specify recipients for form submissions.)
- Bio
- Links
- Photos



## Social

The **Social** tab identifies campaign enrollment preferences for the location. Options include Manual, Semi Automated, and Automated. Refer to this support article for more information and definitions: <https://bit.ly/3QJNtzG>.

### Smart Social

Smart Social allows you to automatically schedule posts for publishing based on a preset schedule of days and times. Things to keep in mind:

- All times are in the local time zone for the location.
- Content is scheduled for 1 week ahead.
- Deleting a queue will delete the scheduled future posts.
- Content needs to be added to the library and toggled for smart social.

## Automated Responses

Customize responses that are automatically sent to private messages and social posts/comments in Inbox.

### Tasks

Customize responses at the tenant level. Use the same message for different locations using location variable or define individual automated responses at the location level.

**Note:** Automated responses for individual locations will override the response that is set up at the tenant level.

## Add Locations in Bulk

Send data to our Technical Support Team to add new locations or to update in bulk. The data **must** be in CSV format and have the following headers. Required fields are shown in red:

- unique-program-code
- program-id
- **location-code** – Unique identifier required for imports.
- **location-name** – Friendly name of the location, as you want it to appear in the platform.
- **location-long-name** – ddd
- **\_\_customfilter\_\_** – Create a column for each custom filter. The filter header name must match exactly as listed on the Filters tab within General Settings. Two “\_\_” underscores on each side of the filter name. If you don’t have filter values yet, you can use N/A.
- **address-line1**
- **address-line2** – Can leave blank if not applicable.
- **city**
- **state** – Two letter abbreviation
- **zipcode**
- **country** – Two letter abbreviation
- timezone
- manager
- manager-email
- phone
- web
- from-name
- from-email

**Note:** Additional headers are included for updates, such as a URL column for each page associated with the location. It’s typically best to request an export of locations first, prior to submitting an updated file.

# Users





Manage your team's login and platform permissions.

The **Users** tab with the Platform Admin allows you to edit user profiles or add new users.

## List View

The list of users is displayed in grid view with columns for: ID, Name, Email, Role, Status, and Actions (impersonate, edit, pause).

- Users are organized by ID by default; click a column name to alternatively sort users by Name or Email.
- You may also search for users by ID, Name, Email, or Role to filter the list.
- By default, only active users are displayed in the grid. Optionally click the All tab to view active and inactive users. You cannot delete user profiles.

Users (264)					
Active		Impersonate System User		Import	Export
All		Search			
ID	Name	Email	Role	Status	Actions
410091	Mary Manager	bdpmanager@reputation.com	BDP Admin (DO NOT USE)	ACTIVE	 
410092	Sam User	bdpfrontline@reputation.com	Frontline Requester	ACTIVE	 

## Adding Users

You can add users through spreadsheet import or one at a time using the Add New User screen.

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Users**.
3. Click **Add User**.
4. Enter the following details for the user:
  - **First Name:** Enter the user's first name.
  - **Last Name:** Enter the user's last name.
  - **Email:** Enter the user's email address to receive notifications from the platform. The email address must be unique. If the user is already added to platform admin under another tenant, you must choose a different address.

**Heads Up!** You can add "+" to some email addresses in order to re-use an address within the system if the mail client allows delivery (e.g., Google).

Example: tomjones@company.com =  
[tomjones+somethingunique@company.com](mailto:tomjones+somethingunique@company.com).

- **Send welcome email with password** Check this box to have the system send a welcome email that allows the user to set a password. If you do not select this box during the user profile creation, you can re-send the welcome email later (e.g., set up user profiles in advance but not allow users into the system until your launch date).
  - **Role:** Select a minimum of one role to apply to the user. If any permissions within the applied roles conflict, the permission that provides access will take precedence.
  - **Locale:** Select the default language for the user. The platform supports variations for English, Deutsch, Español, and Français. Users can change the setting at any time.
  - **Phone:** Enter a phone number for the user.
  - **Default Filter Date Range:** Choose the default selection to apply to the **Date** drop-down (filter) after the user logs into the platform. The user can choose a new date option at any time.
  - **Authorized Locations:** Select the location(s) the user can view within the platform and for notifications. Best practice is to specify access by State, City, or custom filter. Alternatively, you can select individual locations.
  - **Image:** Optionally add an image for the user's profile to appear in place of default initials.
  - **Color:** Choose a background color for the user's default initials.
5. Click **Save**.

### Adding Users in Bulk

Send data to our Technical Support Team to add new users to the platform in bulk. The data **must** be in CSV format and have the following headers. Required fields are shown in red:

user-id	external-id	email	phone	active	notify	first-name	last-name	role	authorize-by	authorize-by-values	locale	country

- User-ID - Created by the platform. You would only provide the user-id if you needed to update an existing user.
- External-ID - Created by the platform.
- **Email**
- Phone
- **Active**
- **Notify** - For a welcome email to be sent. Needs TRUE or FALSE.
- **First-Name**
- **Last-Name**
- **Role** - The name of the role to apply. Multiple roles must be separated by “|” pipe or vertical bar, with no spaces.
- **Authorize-By** - The filter used to authorize location access. Default is “location”.
- **Authorize-By-Values** - For more than one location or piece of data for this field. Each location code must be separated by “|” pipe or vertical bar, with no spaces.
- Locale - The default language set to apply. The locale field will always be en-US for all users based in the United States.
- **Country**

## Editing a User Profile

You can modify user settings at any time. You cannot manually set user passwords, but you can re-send a welcome email that allows the user to re-set their own.

### *To re-send a Welcome email:*

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Users**.
3. Locate the user profile from the list, and then click the **Edit** (pencil) icon next to the profile.
4. Click **Send password reset email**.
5. Click **Cancel**.

Password reset emails expire after 5 days.

### *To Deactivate a User Profile*

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Users**.
3. Locate the user profile from the list, and then click the **Deactivate** (pause) icon next to the profile.

A “PAUSED” status appears next to the user’s profile. The next time you visit the list of users, the profile will no longer be available from the Active tab. To re-activate, click the All tab to search for the inactivated user. You can re-activate by editing the user’s profile and changing status to ACTIVE.

# Roles

Apply persona-based user roles that fit your organization's business requirements.

The **Roles** tab with the Platform Admin includes settings for each role within your tenant, which is used to determine the permissions that apply to a user's profile. You may also add custom roles.

The system provides several roles that you can assign to users or copy from in order to create your own. The following roles are available for every tenant:

- User
- Admin
- Credential Manager
- Escalation Manager Responses
- Listings Coordinator
- Response Approver
- User

You can create custom roles as needed. For example, if you do not want a user to see the Reports tab, you can create a custom "User" role with the View permission disabled under that module.

## Adding Roles

You can add new roles by copying from another role or starting from scratch.

### *To add a role:*

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Roles**.
3. Click **Create Role**.
4. Enter the following details for the role:
  - **Name:** Enter a name for the role as it appears in the Admin toolset.
  - **External ID:** Optionally add an ID that may be present in another system to help identify the role.
  - **Managed Roles:** Allow users with this role to assign other roles to other users. This setting is designed for users who have permissions to add/edit other user profiles. Once enabled, select the roles allowed to be managed by this role. For each of the managed roles selected here, make sure the Managed Roles setting is Off. Learn more here.

- **Description:** Enter a description for the role as it appears in the Admin toolset.
- **Permissions:** Choose the permissions enabled for each module. Permissions options are grouped by “View” (read), “Edit” (update), “Add” (create), “Delete”, and “Other”. To select/unselect all boxes within a column, click the All | None column headers.

5. Click **Save**.

You can also add notifications to a role that will apply to all users assigned to the role.

## Role-Based Notifications

Manage user-level notifications in bulk by applying role-level notifications. For example, all “Accounting” members can share notification settings whenever a ticket is assigned to the Billing queue.

**Note:** Alternatively, you can add alerts on behalf of another user one-by-one by accessing the Admin menu (**Users** tab) and click the **My Notifications** tab for that user.

### *To configure a role-based notification:*

1. Click **Settings** from the upper right corner of the platform.
2. From the Admin menu, click **Roles**.
3. Click on the role you want to edit.
4. Within the role settings, click the Notifications tab and create or modify notifications settings.

The platform prompts you to confirm any settings you apply to the notifications within the role, as they will apply to all users who have that role assigned.



# Additional Admin Settings

Each Reputation platform user has the same five settings tabs: My Account, General Settings, Locations, Users, and Roles. Depending on the solutions your business uses, you may see any variation of the following additional tabs. *If you do not use certain solutions, some tabs will not be available to you.*

Setting	Description	Solution
<b>Actions</b>	Settings for the Actions solution: Queues, Tags, Stages, Escalations, Ticket Types, Type Configurations.	Actions
<b>Auto Responses</b>	Customize automated responses for Reviews and Surveys, or to automatically send to private messages and social posts/comments in Inbox.	Reviews, Surveys, Inbox
<b>AutoFind Results</b>	It is a tool that automatically searches for source URLs in relation to your individual locations.	All
<b>Automation</b>	Settings for automation rules for ticket configuration: Queues, Tags, Stages, Escalations, Ticket Types, Type Configurations.	Actions
<b>Credentials</b>	Location-level credentials or connections to third-party sites for responding to reviews, posting social content, and automatically updating business listings from within the platform.	All
<b>Data Protection</b>	Manage consumer requests for deletion of personal data with accordance to the California Consumer Privacy Act (CCPA) and/or the EU's General Data Protection Regulations (GDPR).	All
<b>Experience Insights</b>	Choose to reveal star rating across all Insights widgets and reports for survey types that do not have a rating question.	Insights
<b>Imports</b>	Manage data for listings profiles from spreadsheet import.	Business Listings
<b>Inbox</b>	Manage settings for Inbox including sources sites, due dates and brands	Inbox
<b>Integrations</b>	Enable integrations for the tenant and define the type of Integration	All
<b>Item Permissions</b>	Choose which items you want to hide or share with specific users or roles within your tenant.	All
<b>Kiosk</b>	Settings for kiosk-enabled systems.	Surveys
<b>Link Tracking</b>	Define and publish custom UTM tracking parameters for your sites.	Social, Business Listings
<b>Listings</b>	Settings for supported and correctable source sites. Settings for listing: Sources, Category Mappings, Listing Extraction	Business Listings
<b>Macros</b>	Response templates for responding to reviews	Reviews

Setting	Description	Solution
<b>Managed Services</b>	Manage preferences for managed review response services by sentiment (Negative, Neutral, and Positive).	Reviews
<b>Reports</b>	Settings for reports: Permissions, Overview, NPS Configuration.	All
<b>Requests</b>	Settings for review or survey requests: Survey Protection Options, Re-Survey Templates, SMS Opt-In, Sources, Unsubscribed Users.	Surveys, Reviews
<b>Social</b>	Manage default campaign preferences.	Social
<b>Sources</b>	Status and capabilities for your enabled sources.	Reviews, Business Listings, Social
<b>Suggested Responses</b>	Manage sources for suggested responses.	Reviews, Inbox
<b>Syndication</b>	Manage settings for publishing reviews to supported sites.	Reviews
<b>Tags</b>	Filter data by the tags applied.	Social, Inbox, Reviews, Surveys
<b>Templates</b>	Manage template permissions for: Custom Dashboards, Custom Reports, Review Requests, Survey, System Dashboard, and System Report.	Dashboards, Reports
<b>Widgets</b>	Settings for managing widgets for Reputation Reviews, Reputation Score, Reputation Summary, or Reputation Surveys.	Reviews Surveys
<b>Help</b>	Includes the email address for our Support Team, as well as other helpful apps	All

# Credentials and Connections

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

The **Credentials** tab within the Platform Admin contains location level authorizations with third-party sites that are necessary for managed business listings, responding to review sites, and/or posting to social media accounts.

## Credential versus Connection

The platform offers two authentication types for most sources: Connection and Credentials.

- **Credentials** – Credentials refer to the username and password used to authenticate to a third-party site. If no API connection is available, the platform relies on *credentials* to perform various posting tasks. Because those authentication requests must secure the credentials, the task may take additional time. Valid credentials are also required for sources such as Google Business Profiles, Facebook, Glassdoor, etc. to respond to reviews.
- **Connection** – A connection uses a secure access method via OAuth, so that the credentials themselves are not relied upon for each request. After a *connection* is established, posting tasks from the platform result in a faster response time. Not all source sites are available for a connection.

**Note:** Any changes to the username or password for connections will cause an inability to respond.

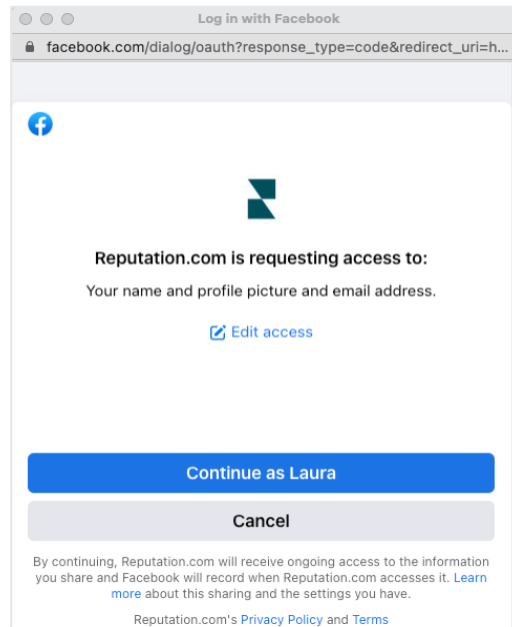
Best practice is to add connections for all available sources at each location, as well as credentials. Connections are always preferred whenever possible.

Sources Health						
Sources						
Add Data Filter						
Source	Connections			Credentials		
	Valid	Invalid	Missing	Valid	Invalid	Missing
BBB	-	-	-	-	-	20
Bing	-	-	-	-	-	20
Facebook	1	-	19	-	-	20

**To add a connection:**

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Credentials**.
3. Click **Add Data > Connection > [Available Source]**.

A new browser window opens with the authentication steps required by the source site. Select the profile to use (may require entering credentials) and agree to terms and services for using the API.



The connection is added under the selected source site. Any locations under your platform account are automatically matched with the locations associated with the selected source profile.

**Note:** If no locations are associated with the profile, you may need to add them to the source profile. (This example uses Google. The process for each source site may vary.)










**To add credentials:**

1. From the top right corner of the platform, click **Settings**.
2. From the left navigation, click **Credentials**.
3. Click **Add Data > Credential**.
4. Click **Add > Credential**.
5. Modify the following settings:
  - **Source:** Choose the source for which you want to add credentials. Once you choose the source, that option is removed from the screen.
  - **Username:** Enter the username to log into the selected source site.
  - **Password:** Enter the password to log into the selected source site.
  - **Status:** – Default is “Valid.” Choose “Invalid” to manually flag the credentials as invalid if they require your further attention, perhaps if these were your last known credentials.
  - **Location:** Select the location to associate with these credentials.
  - **Verification Details:** Click to add additional verification details that may be required for first-time login, such as phone number, email address, or security questions that are associated with the selected profile.
6. Click **Save**.

The credential is added under the selected source site. To edit the credentials, click into the source site, and then click within the **Valid** credentials column. Filter the list by the associated location and click **Edit**.

## Credential Health

The Credential Health grid lists all sources that are available for connection (columns) and the status for each location (rows). Use this grid to quickly identify which location(s) need attention.

Locations (20)										All	Valid	Invalid	Missing
<div><div></div><div>Search locations</div></div>		<div><div></div><div>1   0</div><div>  19</div></div>	<div><div></div><div>1   0</div><div>  19</div></div>	<div><div></div><div>0   0</div><div>  20</div></div>	<div><div></div><div>1   0</div><div>  19</div></div>	<div><div></div><div>1   0</div><div>  19</div></div>	<div><div></div><div>0   0</div><div>  20</div></div>	<div><div></div><div>0   0</div><div>  20</div></div>	<div><div></div><div>1   0</div><div>  19</div></div>	<div><div></div><div>0   0</div><div>  20</div></div>			
BDP - Uptown		<div><div></div></div>	<div><div></div></div>		<div><div></div></div>	<div><div></div></div>		<div><div></div></div>					

# Item Permissions

Share or restrict access to reports, surveys, dashboards, and request templates across the organization.

**Item Permissions** allows you to choose which items you want to hide or share with specific users or roles within your tenant. Declutter platforms and cut down on confusion by only allowing users to see what is essential to their role.

With Item Permissions, you can:

- Restrict access to custom reports
- Restrict access to custom dashboards
- Restrict access to certain surveys
- Restrict access to certain review request templates
- Restrict access to certain system reports
- Restrict access to certain system dashboards
- Set default templates
- Set default custom dashboards
- Set default system dashboards


### Item Permissions

TYPE

Custom Dashboard ▾

Search

USER

Name	Global Permission	Actions
BDP-Uptown CSAT (User)	Edit	

## Configuring Item Permissions

Choose which roles can manage item permissions and get started sharing items across your organization.

### Enable Item Permissions for your Users

1. From the platform, click **Settings**.
2. From the left panel, click **Roles**.
3. Click the **Edit** icon next to the role you want to modify.
4. Under the Platform header, scroll to Managing. Under Object Privileges, select all checkboxes.

Platform					
MANAGING					
Object Privileges	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Global Share <input type="checkbox"/> Manage <input type="checkbox"/> Set Default

5. Click **Save**.

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

### Configure Item Permissions

1. From the platform, click **Settings**.
2. From the left panel, click **Item Permissions**.
3. Choose the **Type**.

TYPE
Custom Dashboard ▾
USER

- The **Custom Dashboard & Custom Report** options load your own custom dashboards/reports by default. To view another user's custom dashboards/reports, enter their name in the **User** box.

- **Review Request, Survey, System Dashboard & System Report** populate all items available. These are not user-specific; everyone can see these.
4. Edit permissions for your chosen item.
  5. Choose Item Permission settings:
    - Check **Default Template** so users automatically view the selected template when navigating to the corresponding tab. This is optional and not available for every item Type.
    - Set the **Global** permission access preference. Options include **View** (anyone in your organization can view this template) and **None** (No permission set).
    - Add permissions for specific users or roles to override the Global permission.
  6. Click **Save**.

**Note:** Click the ellipsis to set as default and share individual custom dashboards and reports from the platform.

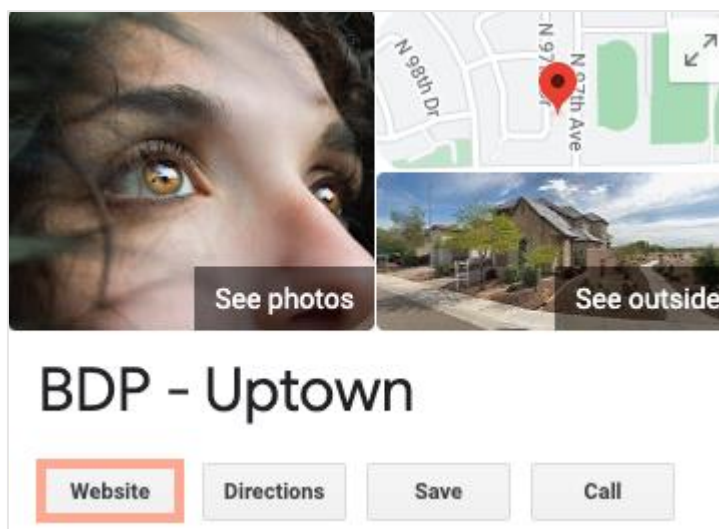


# Link Tracking

Define and publish custom UTM tracking parameters at scale to monitor traffic and measure ROI.

Track where your website clicks are coming from by creating rules within the platform to automatically add the defined UTM parameter code to the end of your URL when a website of the chosen type gets published to the selected source.

**Note:** Link tracking is only available for Listings Management URLs at this time.



## Configuring Link Tracking

Choose which roles can manage item permissions and get started sharing items across your organization.

Configure link tracking one time to apply to all locations, including new locations that are added later!

For tracking to be automatically applied:

- Location needs to be enabled for Business Listings publishing.
- The specific source needs to be enabled for your account and each location.
- URLs identified for link tracking cannot already have UTMs appended.
- GBP UTM tracking needs to be disabled in Profiles.

**Note:** If GBP UTM tracking in Profiles and link tracking are both enabled, the GBP UTM tracking will publish (UTMs built in link tracking will not).

Enable Link Tracking for your Users

- 1. From the platform, click **Settings**.
- 2. From the left panel, click **Roles**.
- 3. Click the **Edit** icon next to the role you want to modify.
- 4. Under the Platform > MANAGING > UTM Parameters, select at least the View and Add checkboxes.

	All   None View	All   None Edit	All   None Add	All   None Delete	All   None Other Actions
Platform					
MANAGING					
UTM Parameters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

- 5. Click **Save**.

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

Configure Link Tracking Settings

- 1. From the platform, click **Settings**.
- 2. In the left panel, click **Link Tracking**.
- 3. Click **Add Link Tracking**.

#### 4. Configure link tracking settings:

**Link Tracking Configuration**

Source

Google

Module

Directory: Listing Management

URL Type

Homepage

Parameters

Parameter Key

Parameter Value

+

1

utm\_campaign

Homepage

✎

✕

Example URL

www.example.com?utm\_campaign=Homepage

Cancel

✓ Save

- **Source** - The site your URL is published to; the source of traffic to your website. Link tracking is only available for Listing Management sources at this time even though Social sites are included in the dropdown.

**Note:** Listing sources included in the dropdown are the Correctable Sites configured for your account.

- **Modules** – The solution your URL is published through. Options include Listings Management (Profiles) and Publishing (Social).

**Note:** Options change depending on the Source selected. Not every source publishes a URL for listings and social content. Link tracking is only available for Listings Management at this time.

- **URL Type** – The URL the link tracking will be added to. Options include: Homepage, Reservation, Sales, Service, Menu, Product.

- **Parameters** – The code added to the end of your URL that passes traffic data to your website analytics tool.

**Note:** While UTMs are customizable, they do not currently take local variables.

UTM Parameter	Description	Example
utm_medium	The campaign or marketing medium that led traffic to your website.	<b>utm_medium=GMB</b> Customers clicked a link on GBP to get to my website.
utm_source	The source or referrer of traffic to your website.	<b>utm_source=Google</b> Customers clicked through to my website from Google
utm_campaign	Adds a level of specificity as to which campaign or product the traffic came from.	<b>utm_campaign=homepage</b> Customers clicked through to my website from my homepage URL
utm_content	Differentiates between different links or call to actions in the same promotion.	Not applicable
utm_term	Tracks which paid keywords resulted in the click.	Not applicable

## 5. Click **Save**.

**Note:** Once Link Tracking is configured, the time for UTM parameters to publish will vary based on standard publishing timelines per source site.

## Locate Link Tracking on your Listings URLs

1. From the platform, click **Listings**.
2. Click **Locations**.
3. Click your desired location to open the card view.
4. Click into the source card that matches your link tracking settings.
5. Links published to the source site will include your UTM parameters.

**Note:** UTM parameters are not included in Source of Truth downloads. The UTMs are only added during publishing.

## Monitoring Traffic

Log in to your analytics tool and navigate to the traffic sources section. Look for the UTM parameters built in your link tracking to monitor traffic.

# Sources

The platform supports hundreds of sources to enhance your reach.

Typically sources fall within the following categories of functionality:

- Reviews
- Listings
- Social
- Metrics
- Messaging

The **Sources** tab within Admin includes details for all sources enabled in your account. Some sources are not used for all accounts or all industries. You can also see a list of sources enabled under the **General Settings > Customer Information** platform admin tab.

# 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.

- [Actions](#)
- [Business Listings](#)
- [Customer Journey Insights](#)
- [Dashboards](#)
- [Experience](#)
- [Inbox](#)
- [Mobile App](#)
- [Rep Connect](#)
- [Reports](#)
- [Reputation Score](#)
- [Requesting](#)
- [Reviews](#)
- [Social Listening](#)
- [Social Publish](#)
- [Surveys](#)