Inbox

User Guide

Reputation

2024

Table of Contents

![Reputation logo]

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Inbox Overview

## Never miss a conversation with your customers again!

Maintain seamless customer engagement across public and private communication channels through Inbox, a single-feed command center to track and respond to all customer and prospective customer feedback. by exchanging messages and interacting with customer comments on your social media posts.

Reviews, surveys, direct private messages, and social post comments from various sites are supported in one omnichannel inbox feed to facilitate faster interactions with customers, resulting in positive customer experience and faster sales.

Exchange messages and interact with customer comments on your social media posts. Assign, reply, and close conversations; track leads; and analyze metrics all within the Reputation platform. Reply to direct messages, and manage reviews and surveys.

Inbox currently supports the following channels:

Feedback	— Reviews — Surveys
Direct Messaging	— SMS Texting — Facebook Business Messages — Google Business Messages — X (formerly known as Twitter) Messages
Social	— Facebook Comments — Instagram Comments — X (Formerly Known as Twitter) Comments — LinkedIn Comments

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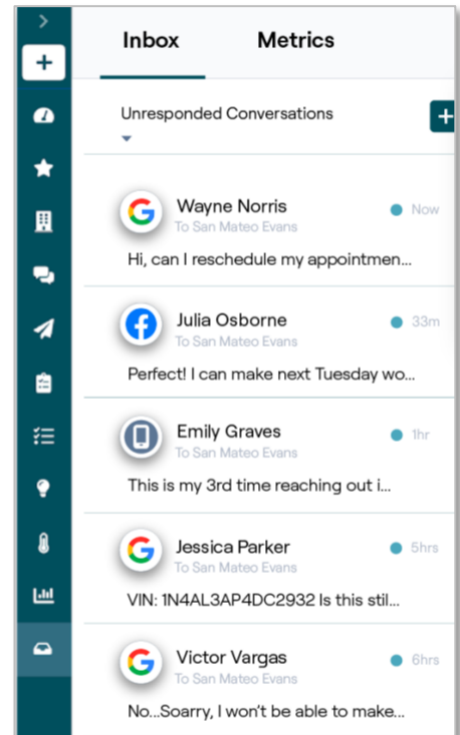
Case Studies

Our research also indicates a direct correlation between customer experience and revenue. Read how real Reputation customers have used Inbox to improve their customer experience, turning feedback into fuel for their business growth.
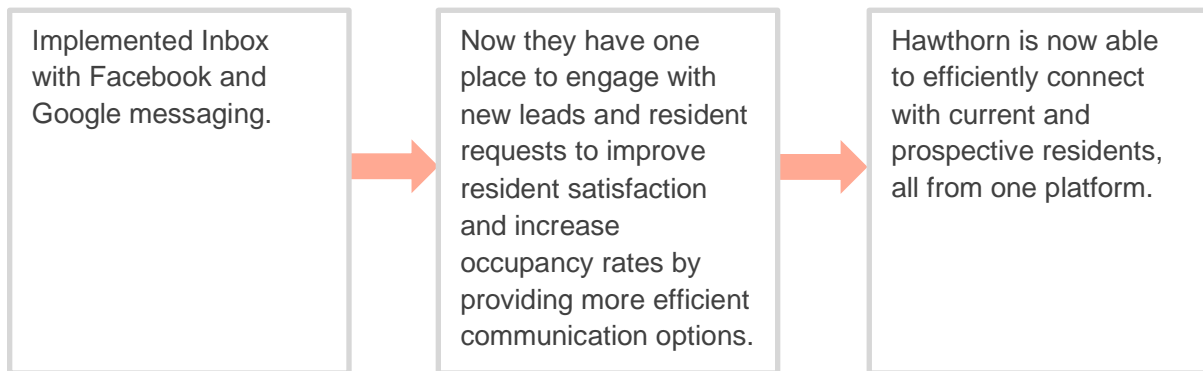
Hawthorn Senior Living

Hawthorn Retirement Group offers management and consulting services to retirement, personal care, assisted living, and memory care communities. Hawthorn is headquartered in Vancouver, Washington and has locations across 20 U.S. states and two Canadian provinces.

Hawthorn came to us seeking help communicating with both current and prospective residents and their families in real time. They were looking for new channels, leveraging social media to make it easy and convenient for people to reach them, and to track number of conversions and average response time.

Actions

| Implemented Inbox with Facebook and Google messaging. | → | Now they have one place to engage with new leads and resident requests to improve resident satisfaction and increase occupancy rates by providing more efficient communication options. | → | Hawthorn is now able to efficiently connect with current and prospective residents, all from one platform. |

Results

⭐ Since implementing Inbox Messaging, they have received over 8.8K messages with an average response time of 19 min.

⭐ More recently, they have improved their average response time to 11 min.

Average Rating

4.5 /5

★★★★⯨

8%	4%	88%
Negative	Neutral	Positive
View	View	View

SAM: Storage Asset Management

SAM: Storage Asset Management came to us with the following needs:

- A way to stay connected to all customers who messaged them through multiple social platforms and to respond to all requests
- A scalable solution to support upcoming expansion to keep in touch with leads and customers

Actions

1. Adopted Inbox to quickly communicate with leads and customers to ensure excellent customer experience.	**2.** Communicated with customers from multi-channels in a centralized platform to allow for maximum efficiency.	**3.** Used the tagging feature within Inbox message themes for content development.

Results

⭐ 5,500 Messages

⭐ 1 Hour Average Response Time

⭐ 2,250 Leads
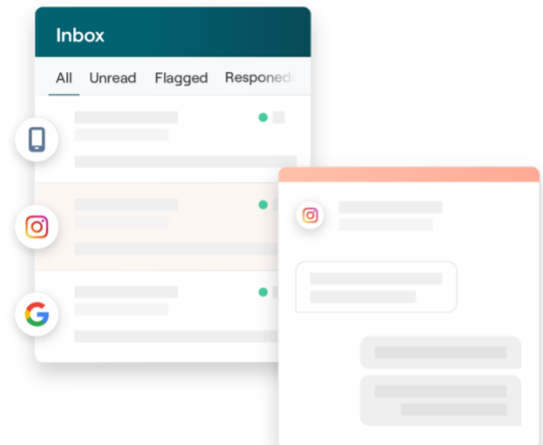
Customer Review

> *Reputation's tool has been great at pulling that all together. We can see the metrics behind it too—how long was our response time, are we getting more customer service messages or sales, etc. Messaging is a great way to gather first party data; Reputation allows engagement with customers and be in touch with them in the best way possible."*
>
> — *Melissa Stiles*

Reputation

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Configuring Inbox

Before using Inbox, you must set up messaging sources, extend user access, and create notifications to ensure messages are never missed. Refer to **page 6** for instructions on setting up your Inbox.

Managing Inbox

Start SMS conversations, send SMS review requests, and assign conversations for specific users to manage. Mark each conversation as read, flagged, or closed to manage the inflow of customer conversations.

Reply to customer conversations using templates, emojis, variables, and attached files, or add a private note to the conversation for internal purposes only.
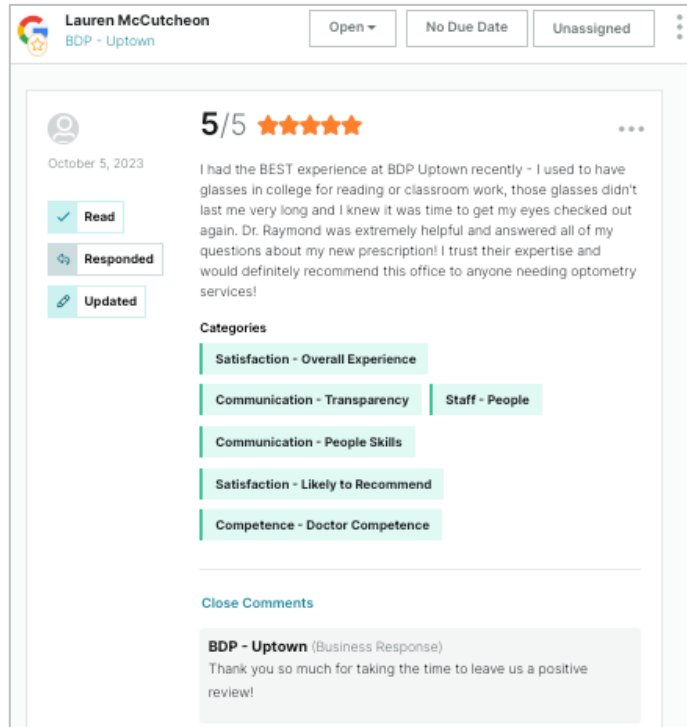
Inbox Metrics

The Inbox Metrics tab reports on average response and time to close metrics in addition to conversation totals, team, and location-specific metrics to help you investigate trends in your messages and team's efforts.

Inbox messaging SLA metric reporting is also available in the Reports tab.

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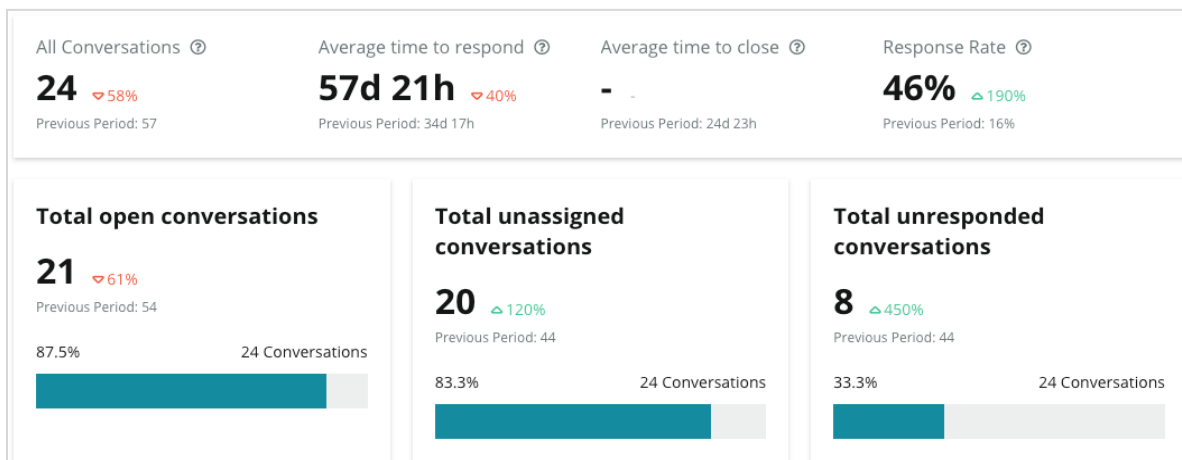
Configuring Inbox

Set up messaging sources, extend user access, and create notifications to ensure a message is never missed.
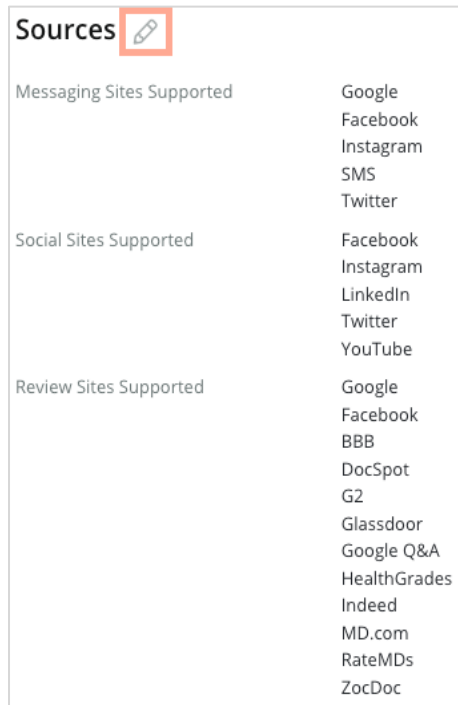
Setting up your Inbox

Determine which source(s) will populate messages in your Inbox.

1. Navigate to Admin on the left side panel. From there, click **Inbox**.

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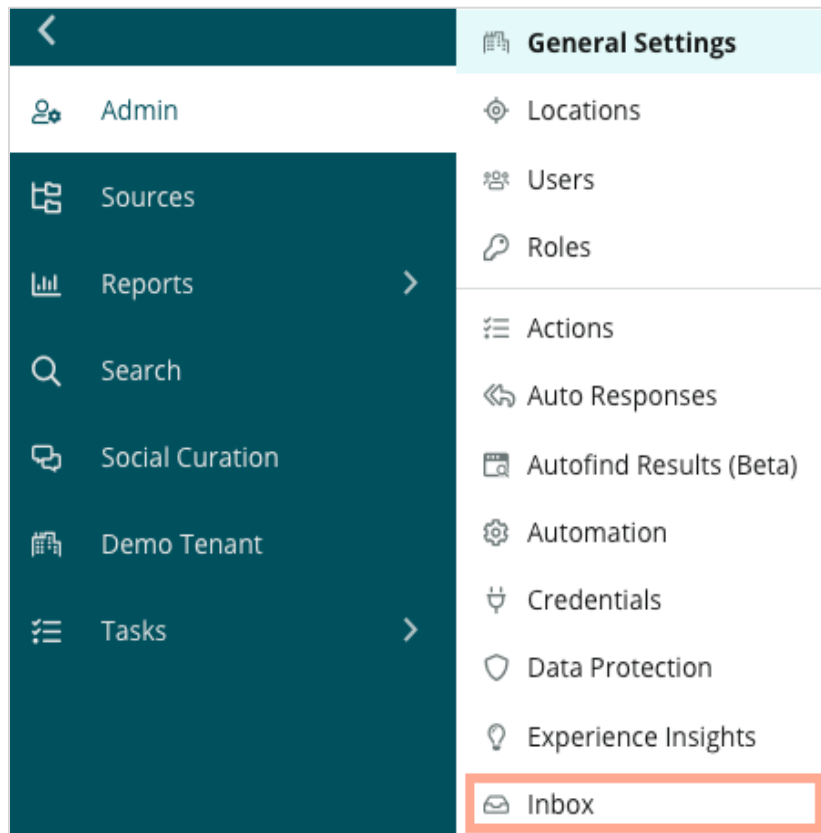
2. Here, you can view the sources already connected to your Inbox, sorted by Messaging Sites Supported and Social Sites Supported. Click the **Edit** icon to add or remove source connections.

3. Select the sources you wish to connect your Inbox to, or check "Automatically enable new sources".
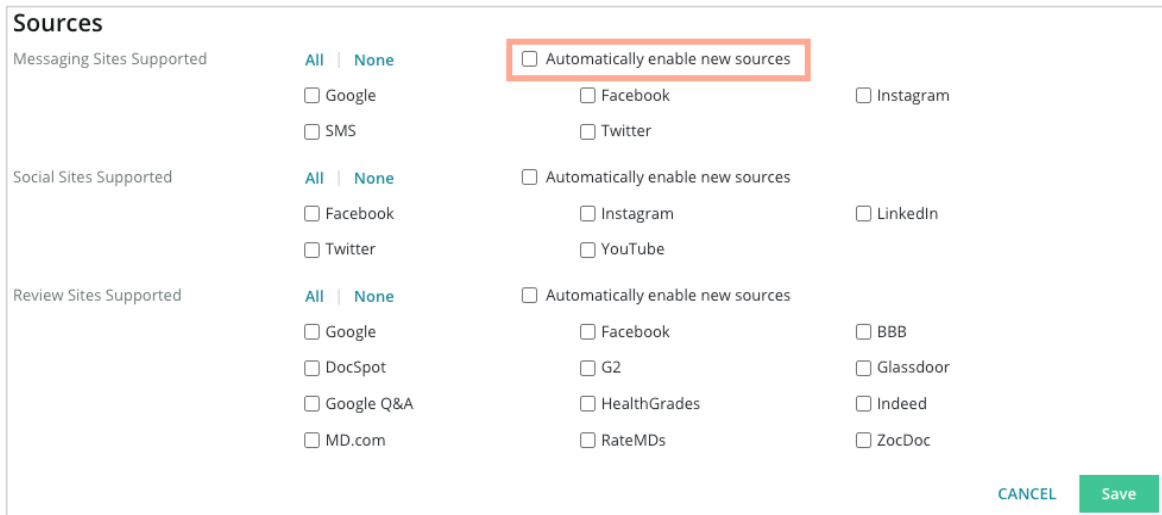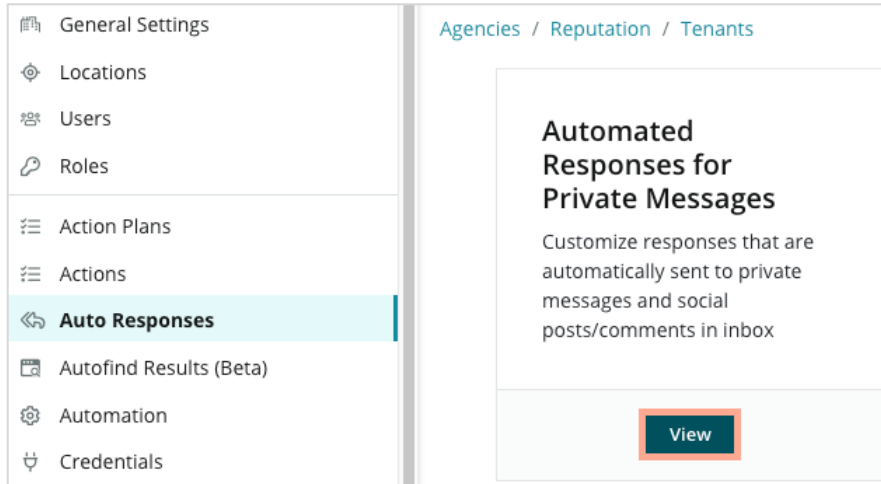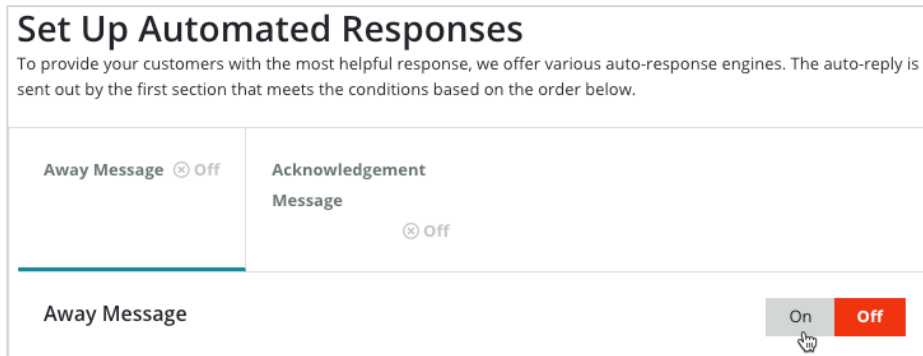

4. Click **Save**.

Setting Automated Responses

Instantly respond to a customer when they message you outside of business hours. As most customers anticipate immediate responses when sending a message to businesses, setting an Away Message and/or Acknowledgement Message is considered a best practice and will also help your response metrics.
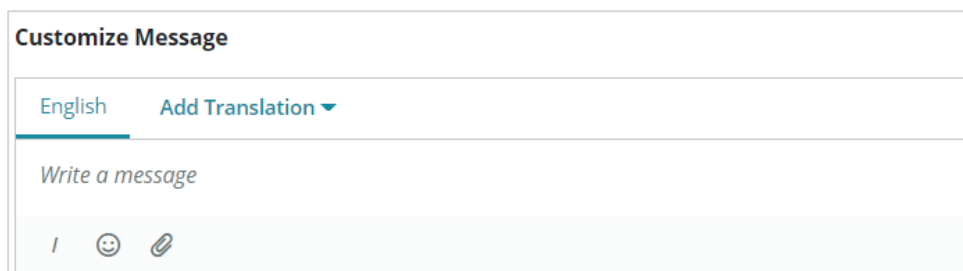
1. Navigate to Admin on the left side panel. From there, click **Auto Responses**.
2. Click **View**.

3. Toggle the Away Message from Off (default) to On.

4. Hours are set as 8am-5pm by default. Adjust as needed. Scroll down to add an Automated Response.

5. Click **Save**.

Configuring Inbox Notifications

Build notifications for individual users or roles to ensure the proper teams take action when there are new messages and when they have been assigned a conversation.

To configure channel specific notifications:

1. Click **Settings** in the upper right-hand corner of the platform.
2. From the Admin menu, click My Account tab and then **My Notifications**.

3. From Notification Settings, click **Create Notification**.
4. From the **Select Event** drop-down, select the event for which you want to create a notification. For example, scroll through the options and choose **New Inbox Message.**
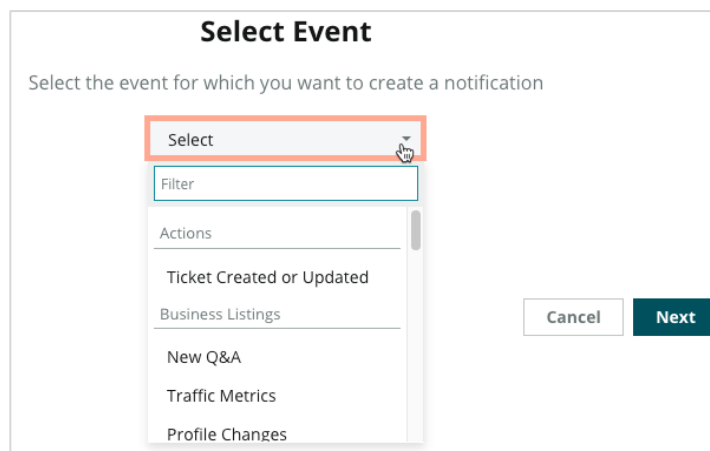
5. Click **Next**.
6. Modify the notification settings.
    a. **Rule Name** – Set a name for the notification to help identify it in your list.
    b. **Channel** – Channel alerts are delivered through. Options include Email, SMS, Mobile Push Notification, and Platform Notifications Tray.
    c. **Frequency** – The frequency with which to receive the alert. Immediate is the only option at this time.
    d. **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 message to help manage/group multiple alerts arriving in your inbox.
    e. **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.

f. 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.

> **Heads up!** If authorized locations are already specified in your user profile, do NOT specify them again in the alert settings. The user profile level automatically cascades location settings to all related alerts, which prevents you from having to modify individual alert properties. If you do modify location settings within an alert, changes at the user profile level no longer apply to the selected alert.

g. Type – Check the boxes for the channels for which you wish to receive notifications.

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.

Automating Due Dates

To set automatic due dates for responding to various incoming messages:

1. Click **the settings gear** in the top right corner of your platform screen.
2. Click **Inbox** in the left sub-navigation menu
3. Click the **Due Date** tab at the top
4. Toggle On the sources you wish to set automatic due dates for
5. Adjust the time frame accordingly and click **Save**.

	Sources	Due Date	Brands			
Due Date						
Private Messages		On	Off	2	Hour(s)	⌄
Social Posts		On	Off		Select	⌄
Social Comments		On	Off		Select	⌄
Review		On	Off	3	Day(s)	⌄
Review Responses		On	Off	1	Week(s)	⌄
Survey		On	Off		Select	⌄
Survey Responses		On	Off		Select	⌄

Reputation

Managing Inbox

> Communicate with customers through their channel of choice and close the loop in real time.

Interact with your customers through several channels all in Reputation's Inbox. The Inbox tab stores all conversations for connected sources, whether reviews, surveys, direct messages, or social.

> **Note:** Depending on your business or user permissions, your view may look different and contain only certain sources. Refer to **page 6** to configure your Inbox accordingly.

Within Inbox, notice the feed on the left-hand side to view a complete list of all interactions, including customer reviews from third-party sites, survey responses, comments and posts from the business's social media accounts, and direct message conversations.

Differentiate the source of interaction in the Inbox feed by the larger icon, as well as the type of message by the smaller icon. *For example, the image below shows a Direct Message the customer sent via Facebook.*

Using Filters

Top line filters affect the data shown on the tab. Apply multiple filters to narrow your focus, including messages assigned to a specific team member, messages from a specific customer, and messages using a selected request template.

1. Click **the "+" icon** at the top of the page to show filters.

2. Scroll through the various filters to sort your messages within Inbox.
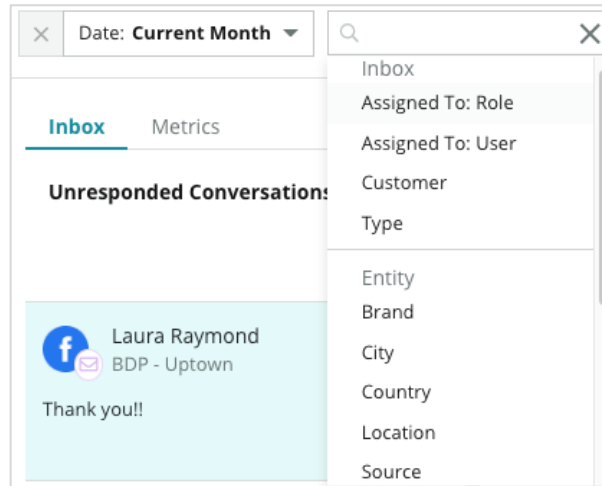
3. To view secondary filters, click the triangular icon next to the **Conversations** dropdown.
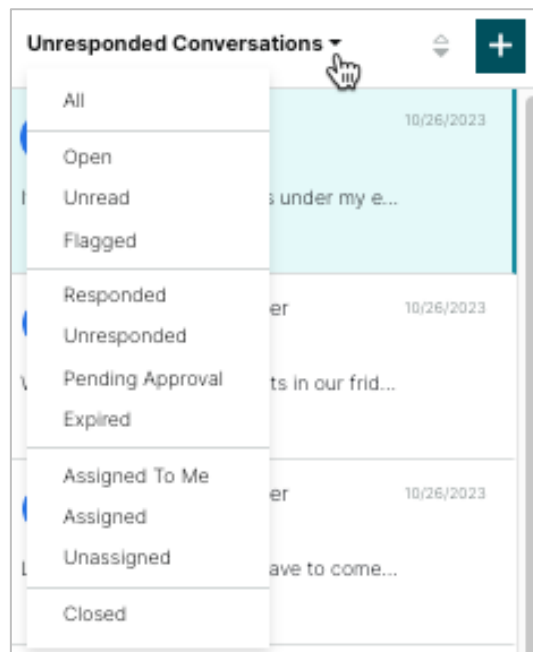
Managing Conversations

Click a conversation to start interacting. Conversations come from configured SMS, Facebook, or Google Business Profiles accounts. You may also see social posts and comments in Inbox.
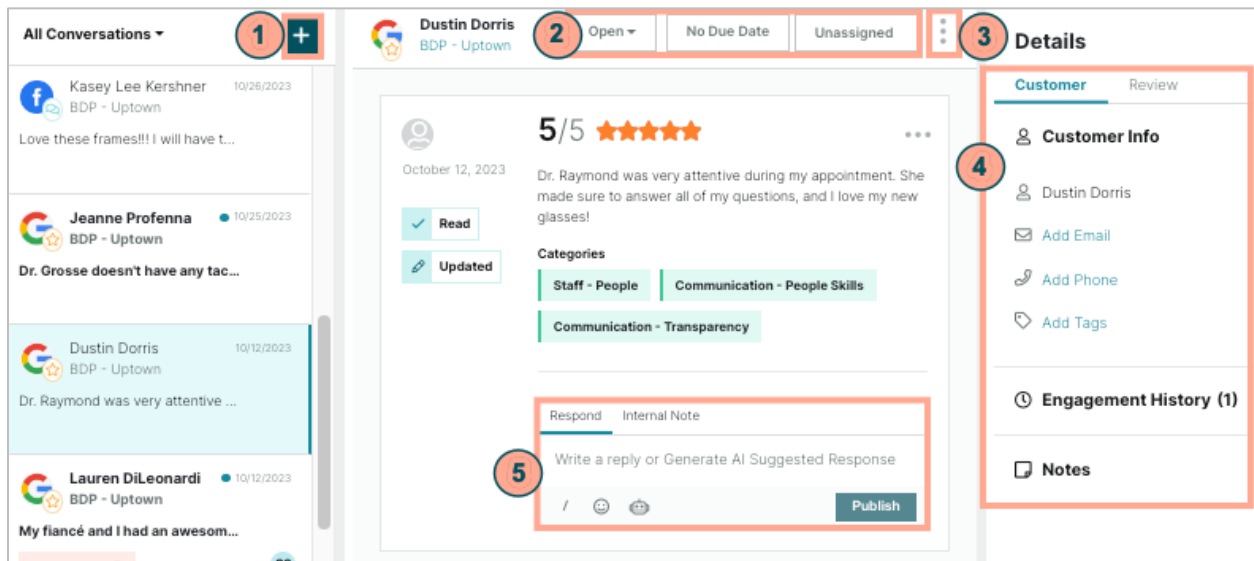
1. Click the (+) to **Start Conversation** and send an SMS message to a customer. Google Business Profile and Facebook messages cannot be initiated from the platform.

    Enter the Location, Customer Name, and Customer Phone Number. Choose to send a message or request a review. If sending a message, type your message or insert a template, emoji, variable, and/or attachment. If requesting a review, select the request template from the dropdown menu.

2. Use these icons to mark a conversation as Open or Closed; assign the selected conversation to a user in the platform; and set a due date of when to respond to the message by. Begin typing the user's name to activate a user list to select from and click **Assign**. To unassign, click the **Assigned to** box, click the **X**, and click **Assign**. Users are automatically notified via email upon assignment.

> **Note:** As an alternative to setting individual due dates per conversation, you may set automatic due dates within Admin settings. Refer to **page 8** for further instruction.

3. Click the ellipsis to explore additional actions for your conversation. Choose to mark as read or unread, flag or unflag, or close or reopen. These actions only apply to the Reputation platform; there is no impact on the native site. Options available depend on role permissions.

4. View the information saved in the platform for the customer in the conversation. Click to edit the customer's name, email, or phone number. Explore the engagement history with the customer or add notes to the team.

   Click **Review** to explore details on the overall interactions between your business and the customer (as shown in **Image 1** below). In the second half of the Review panel (**Image 2** below), assign the selected conversation to a specific category (e.g., general, insurance question, appointment request, etc.); set the conversation as open or closed; and select the root cause to further define the conversation's category.
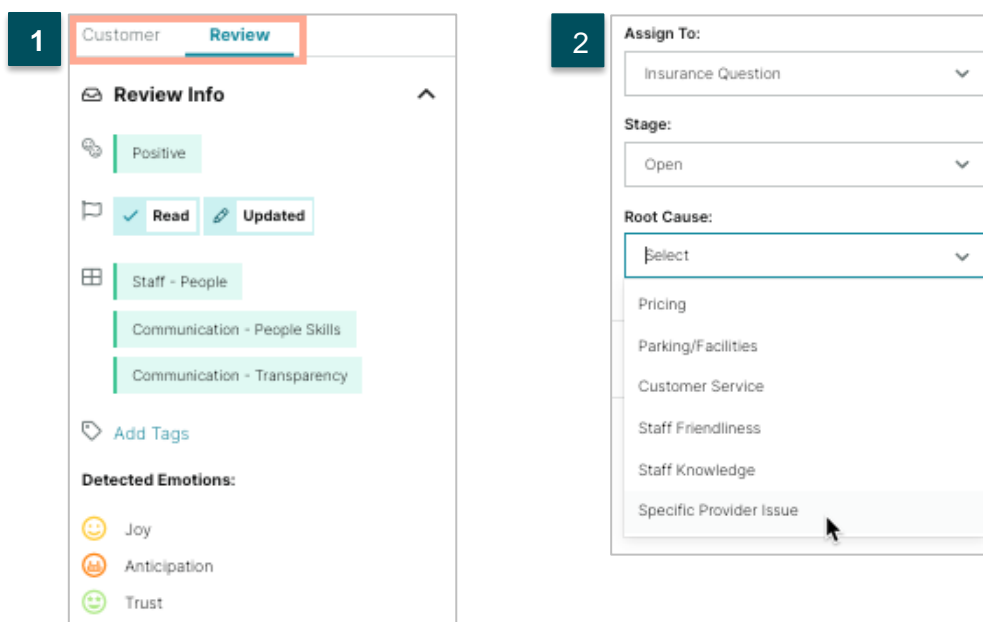
5. Reply to the conversation within the text box. You may type your message directly into the textbox, or:

   - Click the **slash ("/")** to insert a pre-defined macro or template in your Admin settings.

     > **Note:** To create templated responses, click the settings gear icon. Next, click Admin, and then, Macros.)

   - Click the smiley face to include emojis,
   - Or click the robot to generate an AI-suggested response.

   Click **Publish** to send your message to the customer. Add conversation notes on the **Internal Note** tab. Internal notes saved are not sent, or visible, to customers.

![Reputation]

Keep In Mind with Google Business Messages:

If you are receiving GBP messages and not responding, Google can deactivate messaging capabilities from your GBP page.

Facebook messages must be responded to within 7 days.

A customer must opt-in to receive SMS messages before you will be able to respond.
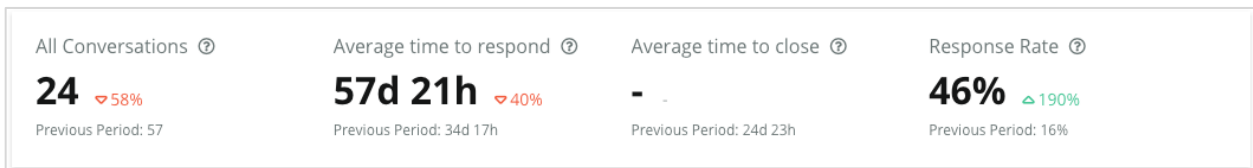
Inbox Metrics

Use Inbox Metrics to help you set internal KPIs for your messaging activity.

The Inbox Metrics tab displays charts and graphs to help you investigate trends in your messages and team's resolution efforts. Understand how many conversations are being managed as well as response and time to close metrics. Monitor conversation assignment metrics as well as team performance by user and location.

Inbox metrics are also available on the Reports tab.

Summary Area

This dashboard shows metrics for the quantity of conversations, the average time it took to respond and close the conversation, and the response rate.

All Conversations ⊙	Average time to respond ⊙	Average time to close ⊙	Response Rate ⊙
24 ▽58%	**57d 21h** ▽40%	**-**	**46%** △190%
Previous Period: 57	Previous Period: 34d 17h	Previous Period: 24d 23h	Previous Period: 16%

Metric	Description
All Conversations	Total of all conversations created in the selected period. View the percent change and value of the previous period.
Average Time to Respond	The average time it takes to respond to customer messages in the selected period. View the percent change and value of the previous period.
Average Time to Close	The average time it takes to close customer messages in the selected period. View the percent change and value of the previous period.
Response Rate	The percentage of customer's messages that have been responded to in the selected period. View the percent change and value of the previous period.

Note: If the customer replies after the message has already been closed, it will reopen in the original conversation and begin the time to respond/close from zero.

Conversation Totals

Understand the percentage of open, unassigned, and unresponded conversations in the selected timeframe.

Total open conversations	Total unassigned conversations	Total unresponded conversations
21 ▽61%	**20** △120%	**8** △450%
Previous Period: 54	Previous Period: 44	Previous Period: 44
87.5% 24 Conversations	83.3% 24 Conversations	33.3% 24 Conversations

Conversation Performance

Measure conversation metrics by location, team member, and source. View quantity of open, assigned, and unresponded conversations as well as the average time to respond, average time to close, and response rates.

Location Performance

Location	All Conversations	Open	Assigned	Unresponded	Responded	Closed	Average time to respond	Average time to close	Response rate
BDP - Flagstaff (B011)	122	122	-	119	3	-	8d 1h	-	2%
BDP - Sun City (B004)	16	16	-	14	2	-	6d 13h	-	13%
BDP - Uptown (B021)	376	376	-	376	-	-	-	-	-

Team Performance

Team Member	Open	Assigned	Unresponded	Responded	Closed	Average time to respond	Average time to close	Response rate
Dani Evans	1	2	1	3	3	1	-	75%
Dean Repiso	1	-	1	4	4	-	-	64%

Source Performance

Source	All Conversations	Open	Assigned	Unresponded	Responded	Closed	Average time to respond	Average time to close	Response rate
Facebook	90415	88269	-	86041	2731	-	60d 9h	-	3%
Instagram	6761	6761	-	6468	293	-	1d 7h	-	4%
LinkedIn	981	981	-	972	9	-	2d 6h	-	1%
Twitter	1334	1334	-	1237	93	-	20h 44m	-	7%

Metrics Options

To access additional options, click the ellipsis in the top, right corner of exportable charts.

Options include: Download PDF, Download CSV, Schedule, or Forward. Any filters that are currently applied to the data set will persist to all options. Delivery emails include a link to view the report as well as a link to launch the report within the platform in order to interact with the data and add customizations (available to users with account credentials).

> **Note:** Operations that take time to process large amounts of data may invoke a pop-up window that allows you to either wait for the operation to continue as a download (must stay on the same screen) or to be notified via email with a link to the download (can move to other screens).

| Option	Description
Download PDF	Export the current data set into a PDF report. The Title Page of the report includes your account logo, name of the report, time period selected, and locations selected.
Download CSV	Export the current data set into a CSV format.
Download Excel	Export the current data set into an Excel format.
Schedule	Create a scheduled report to automatically send an email with the current data set as a PDF or CSV attachment to other users within the platform (individual or role) or email addresses outside the account. Specify a report Name, Frequency (Daily, Weekly, Monthly, Quarterly, Yearly), Format, and Message to include in the body of the email. You can edit scheduled reports from the Reports tab.
Forward	Send the current data set via email with a PDF or CSV attachment to other users within the platform (individual or role) or email addresses outside the account. Specify a Subject and Message to include in the body of the email.

Use the Mobile App

Use the Reputation mobile app to access your Inbox and other data on the go from your mobile device.

With the Reputation Mobile app available in the Google Play Store and the Apple App Store, you can easily access Inbox, Dashboards, Reviews, Surveys, and more. Login options include a "Magic Link", email and password entry, and Single Sign On.

The Home Page provides an overview of performance metrics across the solutions enabled for your locations. Tap **Inbox** along the bottom panel to view your conversations. From there, you can:

- Initiate your own SMS conversation with a customer
- View messages from your customers and respond from your mobile device.
- Sort messages by clicking Unread, Flagged, Responded, Not Responded, Assigned to Me, Assigned, or Unassigned.
- Apply filters to sort by source and date range.
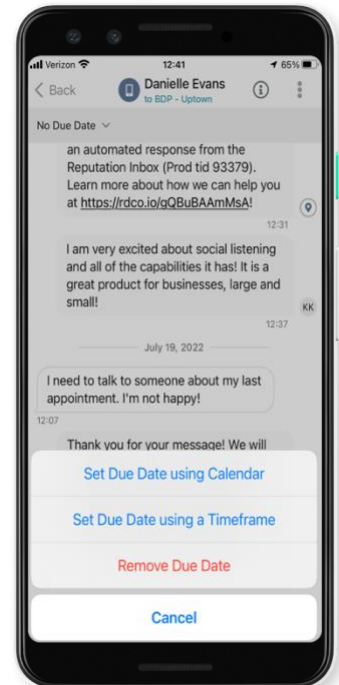
Download the free Reputation mobile app through the Google Play Store or the Apple App Store to start accessing your information on the go, or scan the QR codes below.

Android	iOS

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Premium Paid Services

While we strive to make our platform intuitive and efficient, we understand your time is valuable; resources and bandwidth can be limited. Reputation has a dedicated team of experts ready to help you manage your listings; optimize SEO; and post, publish, and curate your social posts—while also managing your review responses. We can 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)

> **Note:** While our Reputation Premium Paid Services team is available to manage customer engagement on social channels, we do not currently service live messaging.

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

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Additional Resources

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

- Actions
- Admin
- Business Listings
- Customer Journey Insights
- Dashboards
- Experience
- Mobile App
- Rep Connect

- Reports
- Reputation Score
- Requesting
- Reviews

- Social Listening
- Social Publish
- Surveys