Requests

User Guide

Reputation

2024

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Requests Overview

Use mobile, email, SMS, or web-based requests to meet customers where they are. Request reviews and surveys from every customer to build volume and increase ratings and rankings.

The **Requests** tab displays options for requesting reviews (or surveys) and managing those requests.

Requests include precautions to ensure compliance with the following laws and industry best practices, which cover topics such as over-survey protection, SMS opt-in, and unsubscribe options:

- CAN-SPAM Act
- General Data Protection Regulation (GDPR) ePrivacy
- Telephone Consumer Protection Act (TCPA)
- HIPAA Privacy

We encourage you to consult your legal counsel to discuss how (insert law) may apply to your organization and how to ensure compliance.

Feature Overview

Quick Request

The Quick Request page allows you to send an email or SMS text message to one or more customers for a particular location. Messages use customizable templates and are invoked from within the platform.

You can also initiate conversational surveys through the Quick Request page if they are enabled for your account.

Bulk Upload

Use the Bulk Upload page to download a CSV template and compile your list of request recipients. Manually upload the file to the platform to send an email or SMS text message to multiple customers for one or more locations.

Review an error report for any requests that could not be sent upon upload completion.

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Leaderboard

The leaderboard allows you to rank locations (1 = highest) to determine top performers by the number of requests sent. A leaderboard is a great way to engage your team by providing ongoing incentive for generating reviews. Access a version of the leaderboard in the Reputation mobile app to view top performers ranked by number of requests sent through the mobile app.

Metrics

The Request Metrics page allows you to view aggregated metrics about the performance of review requests according to Received, Sent, Delivered, Opened, Clicked, and Click Through Ratio.

In addition to the top line filters, apply secondary filters by Date Range, Mode (SMS, Email, Kiosk), and Groupings.

History

The History page provides a log of each request sent, including Mode, Location, Template Name, Requester, To Email, To Phone, Status, Sites (sent and clicked), and Sent Date.

In addition to the top line filters, apply a secondary filter for Mode (SMS, Email, Kiosk).

Templates

The Templates page displays a list of templates to use in your request solicitations.

With the proper permissions, you can edit non-system templates, create new templates, and configure follow-up logic that determines secondary emails and SMS messages to automatically send if no response is given within a selected number of days.

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Requesting via Reputation Mobile App

Send an SMS text message to customers for a single location through the Reputation mobile app. Messages are customizable within the platform and are invoked by frontline employees from within the app (iOS | Android).

Log in using your platform credentials, via magic link, or single sign on connection. Choose the location for your request and enter the customer's full name and phone number to request reviews on the go.

Android

iOS

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Requests Checklist (First Time)

Decide which locations to send review requests out for.

Compile a list of the location names and corresponding location codes.

Determine target date to launch.

Ensure all steps can be created and expectations are properly set.

- Template development can take 1 week plus time for approval.
- Integration/SFTP set up can take 1-2 weeks. Refer to the Rep Connect Starter Guide for more information: https://bit.ly/3XKC0lA.

Determine which template to use.

- Direct, one step, or two step?
- What would you like for the "Subject" line?
- Would you like to have any edits in the wording of the request? Keep it simple to gain the highest chance of response.
- "Poor" and "Excellent" star rating names cannot be changed.

> **Note:** Refer to page 9 for more information on managing request templates.

Determine pathing for the review request.

Asking all of your customers (not just the happy ones) to review your business is a best practice–and our data indicates it actually improves reputation more than selectively requesting reviews.

One Step Simple Flow

A One-Step flow presents the respondent with a direct feedback question followed by an invitation to leave a public review. This flow has the highest conversion and click-thru rates because it requires the fewest clicks from the user. On the other hand, this flow does not capture comments directly in the request.

Two Step Simple Flow

A two-step flow presents the respondent with a direct feedback question, followed by a comments window, followed by an invitation to leave a public review. This flow has lower conversion and click-thru rates than one-step, but it provides you with direct customer feedback in the event the respondent doesn't click through to the review site.

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Determine which review sites on which you want respondents to leave reviews.

The recommended sites are Google, Facebook, and an industry-specific site (e.g., Healthgrades). Alternatively, you can have the platform use an algorithm to automatically choose the review sites where reviews are most needed for the location to help with review spread.

Determine if you will utilize a drip campaign.

Because some people don't respond to the first email sent, a drip campaign allows for a subsequent "reminder" email to be sent days after the first review. Drip campaigns result in higher conversion and more people leaving reviews

- The email verbiage for the drip campaign is the same as the initial request email verbiage; it doesn't change as it serves more of a reminder.

Determine how to import respondent contact information.

Will your customer data be dropped via SFTP, or do you want the platform to obtain customer data via your SFTP server?

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

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

Determine the "From Name" and "From Email" for the review request.

Many people use noreply@reputation.com or noreply@tenantname.com. We don't want people to reply to the email; however, it is a requirement that we have a from email.

The from name is usually the medical group, practice name, or overall business name. This identifier helps the respondent know who the email is coming from.

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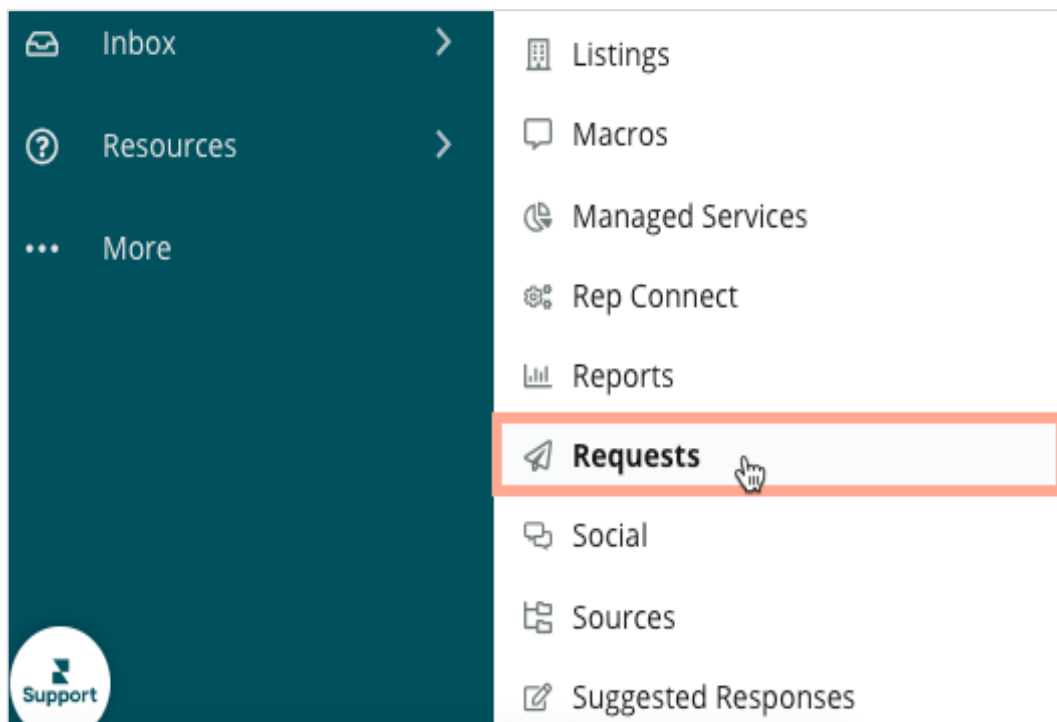
Requests Options

Request options allow you to set account-level options for managing requests.

The Requests tab displays options for requesting reviews (or surveys) and managing those requests.

Heads up! You must have admin privileges on your account to add or modify notifications.

To configure request options:

1. From the top, right corner of the platform, click **Settings**.
2. From the left navigation, click **Requests**.

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3. Set your preferences for the following options:

Option	Description
Survey Protection Options	Set the threshold (in days) to use when preventing the system from sending multiple requests to the same email address or phone number. Survey protection does not apply to follow-up logic.
Re-Survey Template	Set the template to use when requesting a recipient to retake a survey.
SMS Opt-In	Enable or disable the opt-in requirement for requests. If SMS Opt-In is enabled, request recipients must first reply YES to confirm initial consent to receive text messages from your business. Because one-off requests sent person-to-person do not infringe upon United States telecommunication laws, we typically recommend disabling this setting when sending quick requests or requests via the mobile app; bulk requests may be subject to United States telecommunication laws. Follow your own corporate messaging guidelines. If enabled, set your preferred opt-in message and opt-in reply text.
Sources	Toggle the checkboxes to turn requests on or off for various sources.

4. Click **Save** for each set of preferences that you set.

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Managing Request Templates

Customize the email sent to customers for survey and review requests.

The **Requests** > **Templates** page displays a list of templates to use in your request solicitations. You can edit non-system templates, create new templates, and configure follow-up logic that determines secondary emails to automatically send if no response is given within a selected number of days.

Top-line Filters

Sort the available templates by the following: **Level**, **Type**, or **Parent**.

Template Level

System templates are the default templates that are provided to all accounts. You cannot edit system templates, but some system templates allow you to save a copy for customization and use within your requests via quick request, bulk upload, or custom integration.

New templates can be assigned at the tenant level (all locations) or per location.

Note: System templates for "Star" and "Smiley" provide an out-of-the-box simple survey flow. Learn more about simple surveys in our Surveys Quick Start Guide: https://bit.ly/3QO9zkJ

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Template Type

Templates can be designed for one of the following modes: Email, Kiosk, or SMS. The type chosen determines the properties and design of the template, which is handled differently depending on the request method:

| Quick Request	Bulk Requests
Only templates that correspond to the request method (Email or SMS) are available to choose. *Refer to page 13 for more information.*	*Although you can specify any template name, the system only sends requests if the template corresponds with an appropriate contact method for the recipient (email address or phone number).* *Refer to page 22 for more information.*

Template Status

Inactivating a template temporarily removes it from request template drop-downs. You must also stop using the template name in bulk requests and request integrations. You cannot inactivate system templates.

Template Properties

Template properties define how the template functions when used in a request. Preview a template by clicking the template name:

To create a new template:

1. From Requests, click **Templates.**
2. Locate an existing template type from which to copy.
3. Next to the template options, click **Save as New**.

Name	Level	Type	Parent	Actions
BDP-Uptown CSAT Survey	Location (BDP - Uptown)	SMS		
Reputation Live Default Message	Location (BDP - Uptown)	SMS		

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4. In the template editor, modify the template properties. Use the **Preview** option to see how the template design will appear with the selected properties; use the **HTML** tab (email/kiosk type) or **Text** tab (SMS type) to modify the message body or use the **Edit** tab to modify the look and feel using a WYSIWYG designer.

- **Type** – Type of template: Email, SMS, or kiosk.
- **Name** – Name of the template.
- **Status** – Set to active for new templates.
- **Level** – Level of template: Tenant (all locations) or selected location.
- **From Name*** – The From display name used when the email is delivered. Variables {{location-from-name}} automatically pull in the selected location's name.
- **From Email*** – The From email address used when the email is delivered. Variables {{location-from-email}} automatically pull in the selected location's name. This is the address used if the recipient replies to the email.
- **Subject*** – The subject line of the email. Tip – Keep it short!
- **Review Sites*** – **Reputation.com inserted** dynamically chooses TWO of the selected review sites (with exclusions) to include in the request based on a custom algorithm. The algorithm ensures your requests are distributed across review sites that have the highest impact on your Reputation Score. (Refer to the Reputation Score Starter Guide for information on the different components of your Reputation Score).

  If you choose **Manually inserted**, select the review site(s) to include. We recommend choosing no more than two options.

5. Configure Follow-up logic (optional). You can configure logic for the current template on this edit screen or from the list of templates. (See below.)
6. Click **Save.**

Follow-Up Logic

Asking for feedback two additional times after the initial request with several days *between has been proven to improve success rates by 30-60%.* In fact, we generally find that the second follow-up has a higher response rate than the first follow-up review request email. Suggested logic includes:

- **Day 1** – Send initial request.
- **Day 4** – If no review site links clicked, send second request.
- **Day 9** – If no opens or review site links clicked, send third request.

Before you configure follow-up logic, ensure that you've first created the the template(s) that you want to use in the follow-up process.

To configure follow-up logic:

1. At the top of the list of templates (or within the edit screen of a template), click **Configure Follow-up**.
2. Set the first condition:

    If [template name] is not clicked after [days], then send [template name].

3. Click **Add Follow-up** to add another rule.
4. Click **Save.**
    Upon refreshing the list of templates, any templates defined in a follow-up process will list the parent template in the Parent column:

    Within the properties of the parent template, the follow-up logic will be listed:

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Quick Requests

> Send a review request email or SMS text message to one or more customers for a particular location.
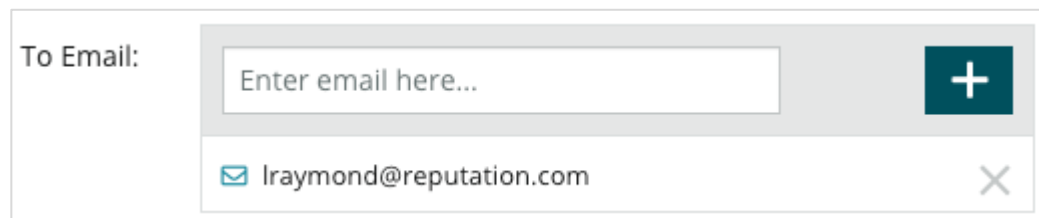
Email Requests

Email requests are delivered to the specified email address(es) in the request. Email messages are customizable and invoked from within the platform.

To request a review via email:

1. From the **Requests** tab, click **Quick Request**.
2. On the **Email** tab, modify the following settings:
   - **Location** – The location from which you want to make the request(s). You can select one.

   - **To Email** – Enter/paste one or more email addresses. Separate multiple addresses with a comma. Click the plus icon to add them to the list.

> **Note:** Although you can send to more than one email address at a time, consider limiting your batch to 10 addresses at a time. For larger batches, use the Bulk Uploader. Refer to page 21 for instructions on how to send bulk requests.

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- **Template** – The subject and body of the message. Email templates are categorized as Corporate (not optimized) or Optimized (passed optimization test). Preview the selected template in the Preview window. Some templates may have follow-up logic assigned.

Heads up! We highly recommend using optimized templates. They are refined on an ongoing basis using split (A/B) testing to ensure maximum conversion rates. Additionally, they are optimized for desktop and mobile.

- **From Name** – The From display name used when the email is delivered. Variables {{location-from-name}} automatically pull in the selected location's name to avoid having to enter this information manually.

Note: To preview or edit the data used, click to expand the Dynamic Fields*.

- **From Email** – The From email address used when the email is delivered. Variables {{location-from-email}} automatically pull in the selected location's name to avoid having to enter this information manually. This is the address used if the recipient replies to the email.

Note: To preview or edit the data used, click to expand the Dynamic Fields*.

- **Subject** – The subject line of the email. Tip – Keep it short!
- ***Dynamic Fields** – Shows the values for the selected variables. Any edits made to standard variable values apply to this request only. To edit variable values at the location level, you must have Admin privileges. From the top, right corner of the platform, click **Settings**. Click **Locations** > choose a location > **Messaging** > **Edit**.

Dynamic Fields:	Standard Variables ⌄
	* location-from-name:
	BDP - Uptown
	* location-from-email:
	bdpsandiego@gmail.com
	* location-name:
	BDP - Uptown
	* location-url:
	https://bdp-uptown.business.site/
	* location-address-line1:
	21917 North 97th Dr
	* location-address-city:
	Peoria
	* location-address-state:
	AZ
	* location-address-zipcode:
	85383

Reputation

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- **Review Sites** – If the selected template includes links to request sites, **Reputation.com inserted** dynamically chooses TWO of the selected review sites to include in the request based on a custom algorithm. The algorithm ensures your requests are distributed across review sites that have the highest impact on your Reputation Score. If you choose **Manually inserted**, select the review site(s) to include. Any site you select in the Advanced window will be included in the message. We recommend choosing no more than two options.
- **Show Advanced** – Indicates the review sites from which to pull into the template, based on the Review Sites settings above.

3. Click **Test** to send a test request email. Actions taken on test emails are not recorded and do not impact your metrics. Click **Send Request** to deploy live request emails.

A message appears to indicate the status of your request. If any requests failed due to address formatting errors or over-survey protection, the details of the failure will appear in a message.

You can view a log of the requests from the **Requests** > **History tab**.

Refer to page 37 for more on the History tab.

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SMS Requests

SMS requests are delivered to the specified phone number in the request. Only one phone number can be entered for each request. SMS messages are customizable and invoked from within the platform.

Heads up! If SMS Opt-In is enabled for your account, the recipient must first reply YES to confirm initial consent to receive text messages from your business. Because one-off requests sent person-to-person do not infringe upon United States telecommunication laws, we typically recommend disabling this setting when sending quick requests for maximum response rate; however, follow your own corporate messaging guidelines.

To request a review via SMS:

1. From the **Requests** tab, click **Quick Request**.
2. Click the **SMS** tab, and modify the following settings:

- **Location** – The location from which you want to make the request(s). You can select one.
- **Customer Name** – Enter the customer's first and last name. If the template includes a variable for recipient name, and no customer name is entered, the variable will be replaced with a blank space.
- **Phone Number** – Enter/paste one phone number. Dashes are not required but are allowed.
- **Template** – The body of the message. SMS templates are categorized as Corporate (not optimized) or Optimized (passed optimization test). Preview the selected template in the Preview window. Some templates may have follow-up logic assigned.

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- **Show advanced options** – Click to expand additional options.

Dynamic Fields – Shows the values for the selected variables. Any edits made to standard variable values apply to this request only. To edit variable values at the location level, you must have Admin privileges. From the top, right corner of the platform, click **Settings**. Click **Locations** > choose a location > **Messaging** > **Edit**.

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Review Sites – If the selected template includes links to request sites, **Reputation.com inserted** dynamically chooses TWO of the selected review sites to include in the request based on a custom algorithm. The algorithm ensures your requests are distributed across review sites that have the highest impact on your Reputation Score. If you choose **Manually inserted**, select the review site(s) to include. Any site you select in the Advanced window will be included in the message. We recommend choosing no more than two options.

3. Click **Test** to send a test request message. Actions taken on "test" messages are not recorded and do not impact your metrics. Click **Send SMS** to deploy live request messages.

A message appears to indicate the status of your request. If any requests failed due to phone number errors or over-survey protection, the details of the failure will appear in a message.

You can view a log of the requests from the **Requests** > **History tab**.

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Conversational Survey

Conversational Surveys are sent via SMS requests and are delivered to the specified phone number in the request. Only one phone number can be entered for each request.

To send a conversational survey via SMS:

1. From the Requests tab, click **Quick Request**.
2. Click the **Conversational Survey** tab, and modify the same settings as SMS Requests above PLUS:

   Survey Template – Choose your pre-created conversational survey to launch from the message. Refer to the Surveys Starter Guide for more information on conversational surveys: https://bit.ly/3QO9zkJ.

3. Click **Test** to send a test request message. Actions taken on test messages are not recorded and do not impact your metrics. Click **Send SMS** to deploy live request messages.

   A message appears to indicate the status of your request. If any requests failed due to phone number errors or over-survey protection, the details of the failure will appear in a message.

   You can view a log of the requests from the **Requests** > **History tab**. Refer to page 36 for more information.

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Bulk Requests

Send review requests in batches to multiple customers at once.

The **Bulk Upload** page allows you to send a review request email or SMS text message to several customers at one or more locations at once. Messages are based on pre-defined templates that are customizable within the platform.

Bulk requests are delivered according to the specified email address or phone number, location, and template in each row of the CSV file.

Bulk Upload

Easily send out survey or review request emails to all of your customers across all of your locations.

⬆ **Upload Requests**   ⬇ Download a Template ▾

Follow the directions below on how to use the bulk upload tab.

1. **Download the desired email request template by clicking on 'Download a Template'**
   a. First select a template from the list below, which coincides with the name of the email template
   b. This will then download a CSV file to your computer

2. **Each column includes all of the variables that are included within your email template. Within the CSV file please include:**
   a. The email template name; for example, Basic Template 1
   b. The location code for each location; for example, 001
      i. This is the code that is used within the Reputation.com system to identify your location. If you do not know how to locate your location code please contact your account manager or admin
   c. A 'subject' = the subject line of the email
   d. A 'to-email' = this is the email address of the customer you would like to send the email request to
   e. A 'to-name' = this is the first name of the customer that you would like to send the email request to
   f. A 'from-name' = this is the business name, or a person from the location that you want the email to come from
   g. A 'from-email' = this is the business's email address, or an email address of a person within the business that you want the email to come from
   h. Any custom variables will then be the subsequent columns; for example, anything from 'patient-name' to 'survey-make'

3. **Each row within the CSV will generate one email send. Ensure that each field is filled. If not, that specific email will not send out**

Heads up! If SMS Opt-In is enabled for your account, the recipient must first reply YES to confirm initial consent to receive text messages from your business. Bulk requests may be subject to United States telecommunication laws; follow your own corporate messaging guidelines.

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To request an Email or SMS review via bulk upload:

1. From the **Requests** tab, click **Bulk Upload**.
2. On the **Bulk Upload** page, click the **Download a Template** drop-down, and choose a template in the list upon which you want the request to be based. (Your selection determines the columns used in the upload spreadsheet. For example, if you choose an email template, some of the columns required for SMS will not be included in the upload template.)

    The bulk upload template named [Account Name]-request-reviews.csv downloads to your computer's default download location.

3. Open the downloaded request template. Copy/paste into the cells the following information for each request.

    *   **template** – The name of the template to use in the request. Make sure the name entered here is a perfect match to the template's name in the platform; an extra space at the end of the name will cause your upload to fail. Some templates may have follow-up logic assigned.
    *   **location-code** – The location code for the location the request is sent on behalf of. To find a location's code, you must have Admin permissions. Click **Settings** > **Locations**. If a code starts with a zero, enter an apostrophe ' before the code in the CSV file (example: '0104); otherwise, the system removes the leading zero.
    *   **subject** – Applies to email message types only. The subject line of the email. If your template already has a subject line defined, you may skip this column.
    *   **to-email** – Applies to email AND SMS message types. The email address of the recipient. Double-check the formatting to ensure address accuracy.
    *   **to-phone** – Applies to SMS message types only. The phone number of the recipient (dashes are allowed but not required). Double-check the formatting to ensure accuracy.
    *   **to-name** – Enter the customer's first and last name (for Email). If the template includes a variable for recipient name, and no customer name is entered, the variable will be replaced with a blank space.
    *   **from-email** – The From email address used when the email is delivered. Template variables {{location-from-email}} automatically pull in the selected location's name to avoid having to enter this information manually. **This is the address used if the recipient replies to the email.**

- **from-name** – The From display name used when the email is delivered. Template variables {{location-from-name}} automatically pull in the selected location's name.
- **recipient-name** – Enter the customer's first and last name (for SMS). If the template includes a variable for recipient name, and no customer name is entered, the variable will be replaced with a blank space.

4. Save the file in a CSV format (e.g., [Account Name]-request-reviews_Sep2020.csv). Then from the Bulk Upload screen, click **Upload Requests**.
5. In the Upload Requests window, click **Choose File** to locate the file you just saved.
6. Select the **Import with errors** check box if you want to proceed with the request even if some rows have errors. All rows that do not have errors will process, and you can re-upload the request for ONLY the rows that did not upload in a second request after fixing the errors. If you leave the **Import with errors** check box cleared, if any rows have errors, none of the requests will be processed until all errors are fixed. Regardless of the option chosen, over-survey protection is in place to ensure you do not send duplicate requests within a set number of days.
7. Click **Upload and Send**.

A message appears to indicate the status of your request. If any requests fail due to address formatting errors, over-survey protection, or a template that does not apply to the selected "to" input, the details of the failure will appear in a message.

You can view a log of the requests from the **Requests** > **History tab**.

Requests via Mobile App

Admin Instructions: Setting Up Frontline Users

The mobile request option through the Reputation mobile app (iOS | Android) allows your frontline employees to send a review request SMS message to a customer on-the-spot. The app includes gamification to incentivize your staff to continually request reviews for maximum search rankings.

Considerations for implementing the app for your organization:

- If SMS Opt-In is enabled for your account, the recipient must first reply **YES** to confirm initial consent to receive text messages from your business. Because one-off requests sent person-to-person do not infringe upon United States telecommunication laws, we typically recommend disabling this setting when sending requests from the mobile app for maximum response rate; however, follow your own corporate messaging guidelines.
- Each frontline employee who will request reviews from the app must have a mobile device with the Reputation mobile app installed (iOS | Android).
- Each requester must also have a user profile created within your platform account (**Admin** > **Users**). Alternatively, you can have your employees use a magic link to log in so that you don't have to send welcome emails or require them to set up a password. However, this option requires users to be able to check their company email on their mobile devices. See user instructions below.
- The app contains a leaderboard for frontline employees to see who has requested the most reviews at their location. Additionally, you can use the leaderboard within the web application to see request leaders across multiple locations.

User Instructions: Requesting Reviews

Review requesting is an important step in collecting feedback from your silent majority! The Reputation mobile app allows you to personally invite your customer to leave a review through an SMS text message.

To send a mobile request:

1. Download the Reputation mobile app on your mobile device (iOS | Android).
2. Open the Reputation mobile app and log in using your email and password, magic link, or single sign-on connection.
3. From the home page, tap **Reviews.**

> **Note:** You can also request reviews by tapping the **plus icon** at the bottom of your screen. Next, tap **Send Review Invitation.**
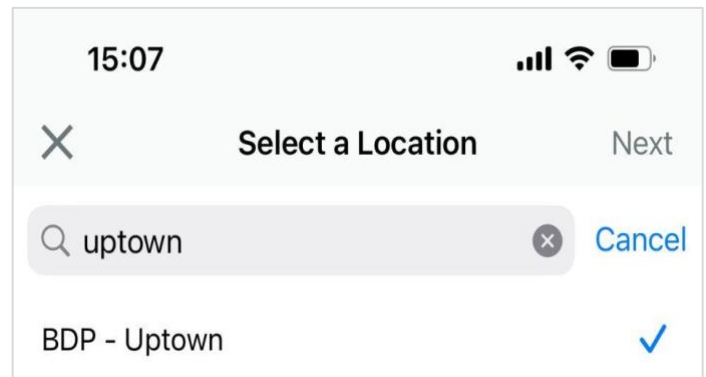
Was this guide helpful? Let us know: https://bit.ly/rep-guides
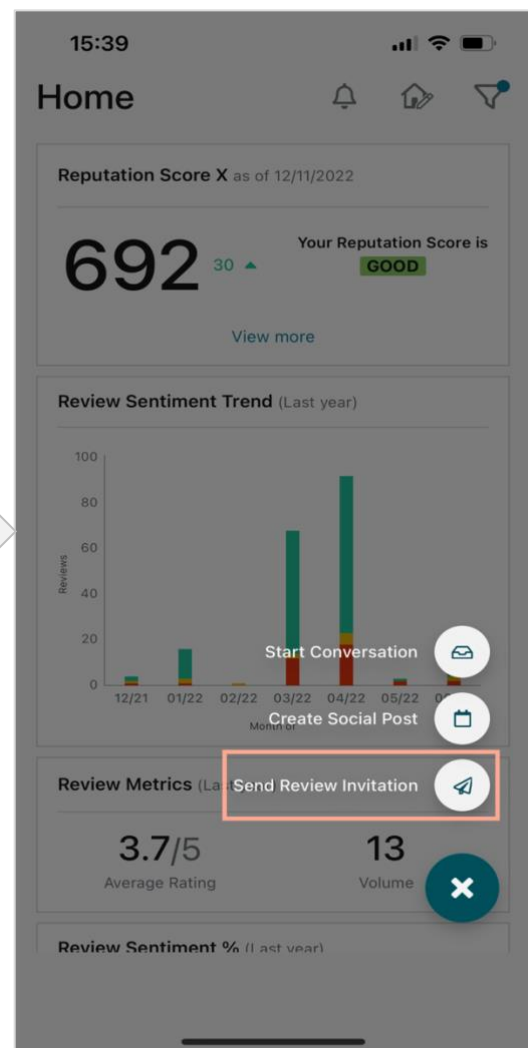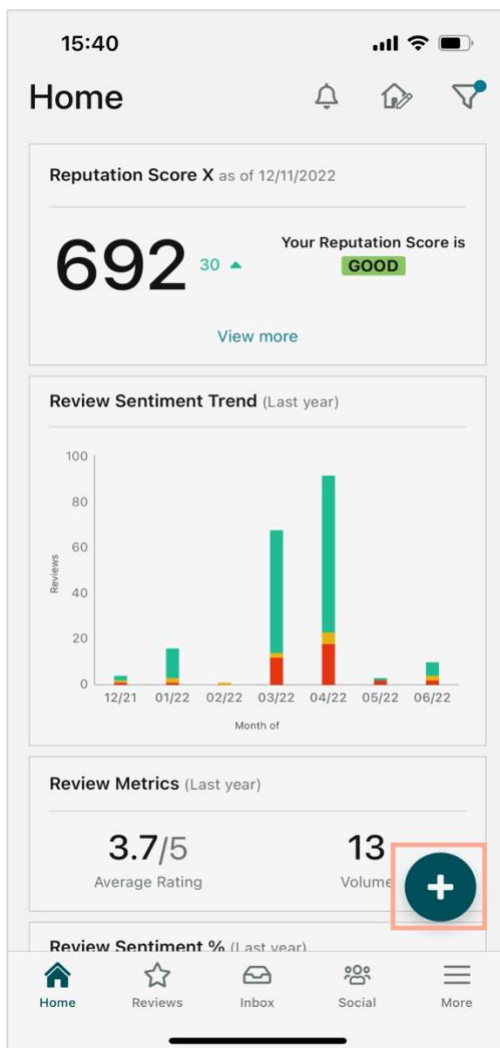
4. Tap the icon in the bottom left corner to request reviews.
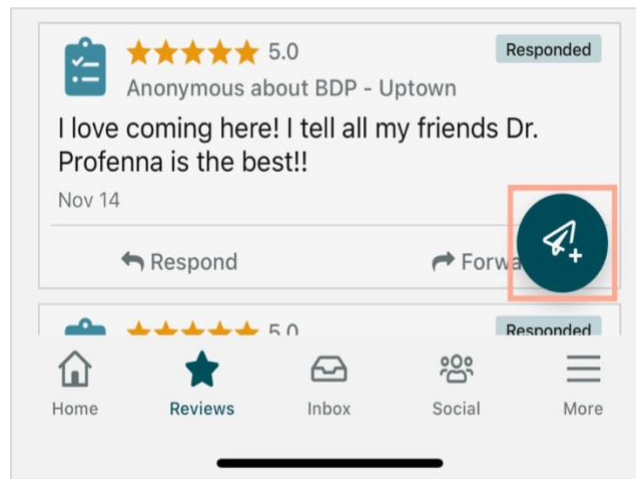
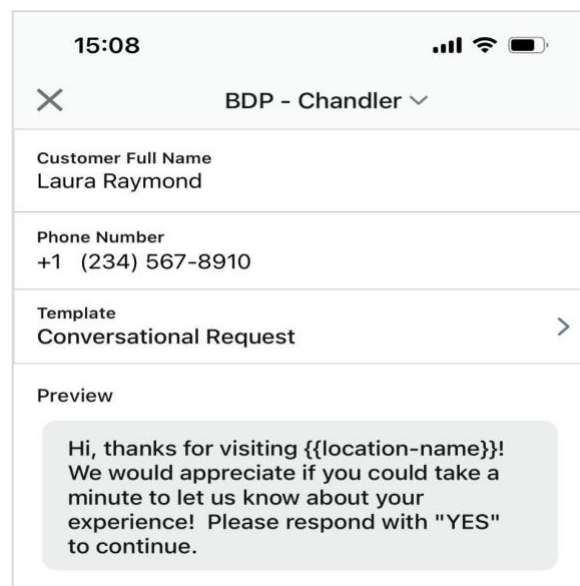**5.** Choose the location you are sending the request on behalf of.

Note: If you only manage one location, that location will automatically be selected.

6. Enter the customer's full name and phone number.

7. Select an SMS template.

Note: Templates are un-editable on the mobile app.

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8. Tap the plus (+) icon at the bottom of your screen to customize your request with an image or a personalized message. Customizations are optional.

9. Tap **Send SMS**.
10. Tap **OK** on the message confirming the request was sent.

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Customer Request Experience

The recipient receives an SMS message and clicks the link to open review site options for the location they visited. If SMS Opt-In is enabled for your account, the recipient must first reply **YES** to confirm initial consent to receive text messages from your business.
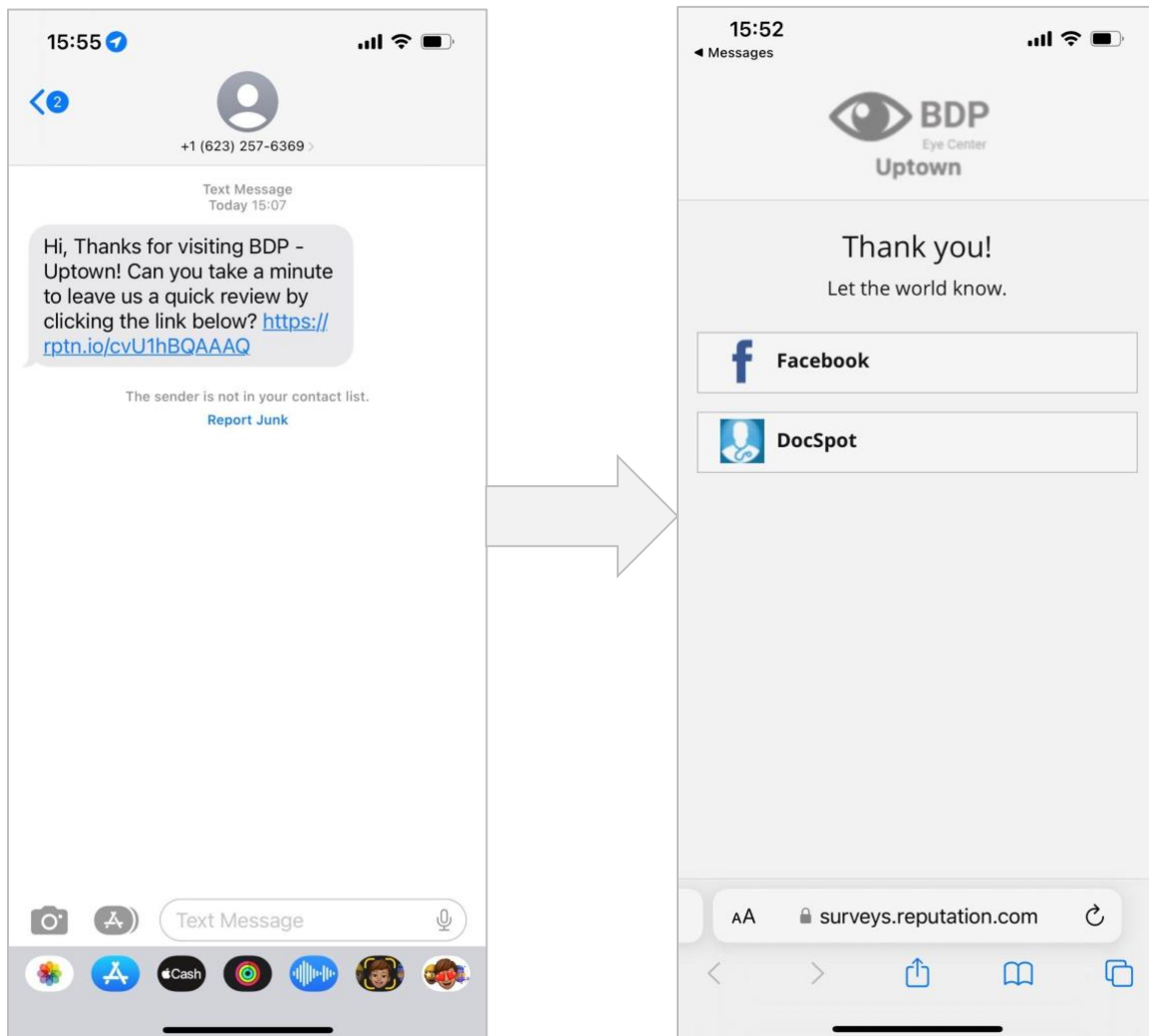
Note: The recipient can reply STOP or UNSUBSCRIBE to stop receiving requests. You will not be notified if a recipient unscubscribes.

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Leaderboard on Mobile App

The more review requests you send, the higher your ranking on the app Leaderboard. The Leaderboard shows you who has sent the most review requests at your location.

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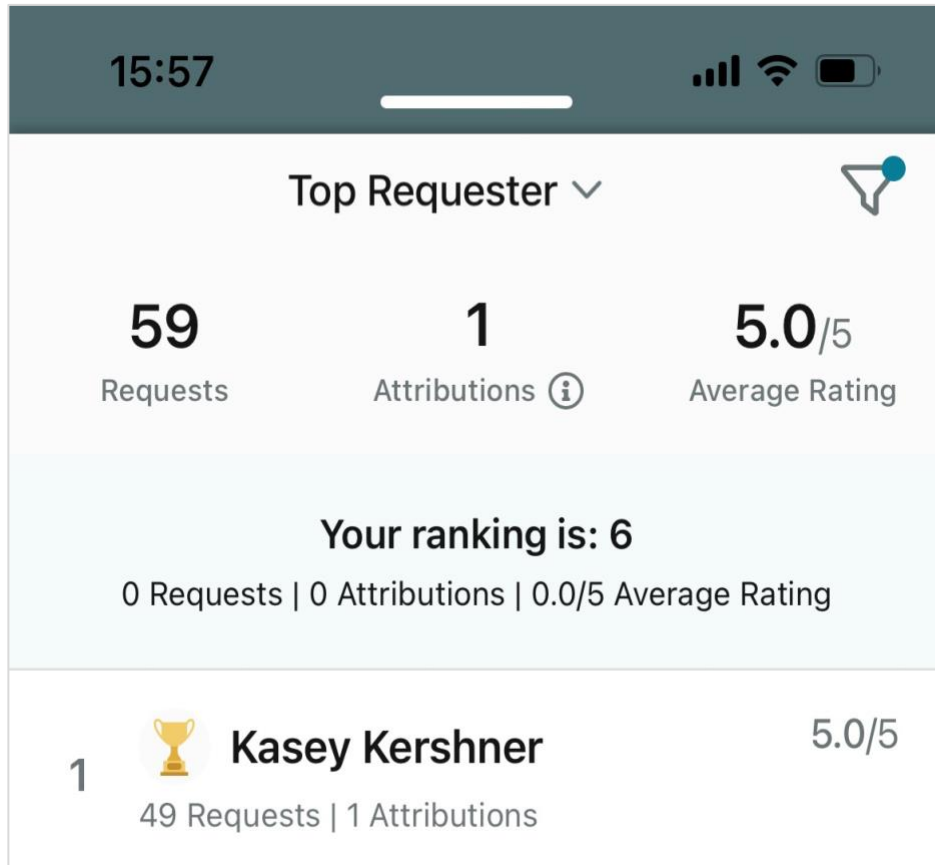
Leaderboard

A leaderboard is a great way to engage your team by providing ongoing incentive for generating reviews, such as Top Requester of the Month.

The Leaderboard page allows you to rank locations (1 = highest) to determine top performers in the number of requests sent. Within the web application, you can view statistics for requests sent, resulting clicks, number of total reviews and surveys, attributed reviews and surveys, and average star rating.

Note: Frontline employees using the mobile app can also access a version of the leaderboard to view top performers within their location.

Filters

The top line filters affect the data shown on the tab. Secondary filters are available to limit the data by request mode: **All**, **SMS**, **Email**, and **Kiosk**. Group By filters allow you to sort the data by **Location**, **Requester**, **City**, **State**, or custom filters.

Note: Grouping by Requester displays an additional option to filter by role.

STATE	CITY	LOCATION
All	All	All

ZONE	BRAND	DATE RANGE
All	All	Last year

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Summary Area

Displays the total results for the selected filter(s).

Requests Sent	Clicks to Review & Survey	Attributed Reviews & Survey ⑦	Average Star Rating
80	52	1	★★★★★ 5.0 /5

Detail Area

Displays the detailed results for the selected filters. Click a column name to sort.

Rank ⇕	Location ⇕	Requests Sent ⇕	Clicks to Review & Survey ⇕	Attributed Reviews & Survey ⑦ ⇕	Average Star Rating ⇕
1	BDP - Uptown	59	36	1	★★★★★ 5.0 /5
2	BDP - Phoenix	17	15	0	No Rating Specified
3	BDP - Chandler	3	1	0	No Rating Specified
4	BDP - Flagstaff	1	0	0	No Rating Specified

Column	Description
Rank	The requester or location with the most review requests sent.
Location/Requester	The location or user associated with the ranking.
Requests Sent	The total number of requests sent from the selected location or user (requester).
Clicks to Review & Survey	The total number of clicks generated from the request. The click count correlates to any links within the email or any review site links in SMS messages. The number of clicks does not correlate directly to a review posting beyond the initial message if the user abandons the request process, but it is a good indicator of interest. For example, this location sent 6 requests. Of those requests, 4 clicks were generated (not necessarily unique).

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Leaderboard Options

To access additional options, click the ellipsis in the top, right corner of the Leaderboard summary area. Options include: **Download PDF**, **Download CSV**, **Schedule**, or **Forward**. Any filters that are currently applied to the data set will persist to all request options.
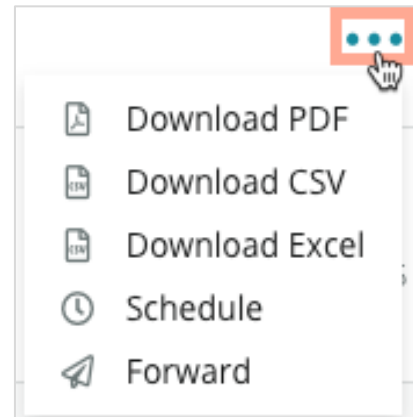
Note: Operations that take time to process large amounts of data may invoke a pop-up window that allows you to either wait for the operation to continue as a download (must stay on the same screen) or to be notified via email with a link to the download (can move to other screens).

Column	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 (Requests Sent – By Location), time period selected, and locations selected.
Download CSV	Export the current data set into a CSV 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.

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).

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Metrics

> Identify how successful your request efforts are in terms of review conversion and other factors.

The **Request Metrics** page allows you to view aggregated metrics about the performance of review requests, such as which template is most successful. Download report data to CSV for further analysis.

Filters

In addition to the top line filters, the following options are available to filter and group the data in the report:

| Date Range | All | 7 Days | 30 Days | 90 Days | 180 Days | One Year | Custom |

Mode: All

Group by: Time: Month ✕ | Time: Month ▾

Filter	Description
Date Range	The time period for the report data: All, 7 days, 30 days, 90 days, 180 days, one year, or custom.
Mode	The request mode: SMS, Email, and/or Kiosk.
Group by	The groupings to include in the report: Custom filter(s), Location, Template Name, Mode, Requester, Time. Each filter chosen appears as its own column in the report.
Date Range	The time period for the report data: All, 7 days, 30 days, 90 days, 180 days, one year, or custom.

> **Note:** If you apply the filters above, click **Generate Report** to update the Summary/Detail area below.

Summary/Detail Chart

Displays the results of the report. The Details option includes additional data for Sent, Delivered, Opened, and Clicked columns.

Column	Description
[Group By]	The group by filter(s) chosen.
Received	The number of requests invoked on behalf of your account (i.e., the number of requests "received" by the Reputation Generation Engine).
Sent	The number of requests sent to the designated recipients (i.e., the number of requests "sent" from the Reputation Generation Engine). The Details option also shows the number of requests not sent. The percentage indicates the ratio of received to sent. A request might not be sent if the request includes an address/phone number with failed validation or that has already been solicited within your account's survey protection threshold.
Delivered	**SMS**: The number of SMS requests successfully delivered to the phone numbers provided. **Email**: The number of email requests successfully delivered to the email addresses provided.

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	The Details option also shows the number of requests not delivered. The percentage indicates the ratio of sent to delivered.
Opened	**SMS**: The number of SMS requests Delivered. There is no way to track if an SMS was opened, so the assumption is that if the message was delivered, it was also opened. **Email**: The unique number of email requests that were opened by the recipient. The Details option also shows the total number of opens (not unique). The percentage indicates the ratio of delivered to opened.
Clicked	**SMS**: The number of unique clicks on the tracked link in SMS requests. This is the link embedded in the SMS message, not the survey or review site options page that opens next. **Email**: The number of unique clicks on a tracked link in email requests. This can be a survey link or third party review site links, whichever is embedded in the email. The Details option also shows the total number of clicks (not unique). The total click count correlates to: 1. Any links within the email/SMS message. 2. Any review site links in the email. 3. Links on the review site options page that opens after the initial link in the SMS is clicked. The number of clicks does not correlate directly to a review posting beyond the initial message if the user abandons the request process, but it is a good indicator of interest.
CTR	**SMS**: The ratio of unique clicks to delivered. **Email**: The ratio of unique clicks to unique opened.

History

> The History page provides a log of each request sent from the platform and mobile app.
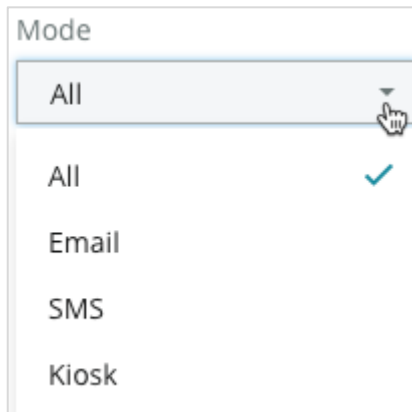
Requests can come from multiple sources:

- Reputation Mobile App
- Quick Request
- Bulk Upload
- Surveys
- Integrations

The **History** tab shows all requests sent from all sources.

Filters

In addition to the top line filters, the following option is available to filter the data:

Column	Description
Mode	The request mode: All, SMS, Email, or Kiosk. Mode All All ✓ Email SMS Kiosk

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Detail Chart

Displays the results of the selections.

Mode	Location	Template Name	Requester	To Email	To Phone	Status	Sites	Sent Date
SMS	BDP - Uptown	Conversational Survey	Dani Evans		+1219*****	Clicked	f ▯	Dec 5, 2022

Field	Description
Mode	The request mode selected in the filter.
Location	The location included in the request.
Template Name	The template used in the request.
Requester	The user associated with the request.
To Email	The email address to which the request was sent. This column is blank if the request was sent via SMS through the mobile app or a quick request.
To Phone	The phone number to which the request was sent. This column is blank if the request was sent via Email.
Status	The status of the request: Delivered or Clicked.
Sites	The sites (or survey) clicked in the request. Available sites are determined by the template options. Sites not clicked appear dimmed.
Sent Date	The date the request was sent.

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History Options

To access additional options, click the ellipses in the top, right corner of the page. Options include: **Download PDF**, **Download CSV**, **Schedule**, or **Forward**. Any filters that are currently applied to the data set will persist to all request options.

> **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 (Requests History Log), time period selected, and locations selected.
Download CSV	Export the current data set into a CSV 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.

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).

Best Practices for Requesting Reviews

> Response rates for SMS requests are 4-15x better vs. email requests.

Email requests use fully customizable templates and are more visually appealing than SMS; however, email requests may introduce a layer of friction if the recipient reads the request from a computer rather than on a smartphone. In other words, if your request template includes links to review sites, the user may be required to perform an additional step of logging into those review sites if not already authorized within the current browser session (e.g., Google, Facebook).

SMS delivery ensures the customer is already on his or her mobile device, which typically results in a more seamless experience because *most* mobile users are already logged into those apps and can access the review form with one touch.

General Best Practices

Mobile App Requests

For best results in review attribution, follow these best practices:

- **Deliver a great experience!** – People writing reviews are generally very dissatisfied or very satisfied. If the service is average, people are unlikely to write reviews. You must earn a positive review.
- **Tell customers what to expect.** – Let customers know that you will send them a request to review their experience with you, and verbally invite them to click on the link and write a review. It is important to be clear as to what you need customers to do.
- **Show gratitude and make it personal.** – Thank customers preemptively for taking the time to click on the link and write a review. Explain that you are striving to deliver the best service and that you feel proud and motivated when you hear positive feedback from customers.
- **Be particular about timing.** – If the request is opened using the location wifi, it is likely that reviews will be removed as "fake" by Google, Facebook, and other review sites. It is best to wait for customers to leave the premises before sending the requests. However, do not wait too long before sending the request (no more than 6 hours).
- **Play by the rules.** – Never offer monetary incentives or gifts to motivate the recipients to write reviews.

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Bulk Requests

- Review sites want to see steady, organic review growth over time. Rather than send an email or SMS message to your entire customer-base at once, divide your bulk requests to send no more than 10% per location each week to avoid a deluge of reviews in a single month.
- To maximize deliverability against SPAM filters, ensure the "From" email includes a real name from your business domain "sarah.jones@yourcompany.com," rather than "noreply@…" or "…@gmail.com."
- Ensure the "To" address is entered accurately to streamline the request process.

Compliance Best Practices

Requests include precautions to ensure compliance with laws and industry best practices, such as over-survey protection, SMS opt-in, and unsubscribe options. These laws include:

- CAN-SPAM Act
- General Data Protection Regulation (GDPR) ePrivacy
- HIPAA Privacy
- Telephone Consumer Protection Act (TCPA)

If SMS Opt-In is enabled for your account, the recipient must first reply **YES** to confirm initial consent to receive text messages from your business.

- **Quick Requests** – Because one-off requests sent person-to-person do not infringe upon United States telecommunication laws, we typically recommend disabling this setting when sending quick requests for maximum response rate; however, follow your own corporate messaging guidelines.
- **Bulk Requests** – Bulk requests may be subject to United States telecommunication laws; follow your own corporate messaging guidelines.

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
- Inbox
- Mobile App

- Rep Connect
- Reports
- Reputation Score
- Requests

- Reviews
- Social Listening
- Surveys

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