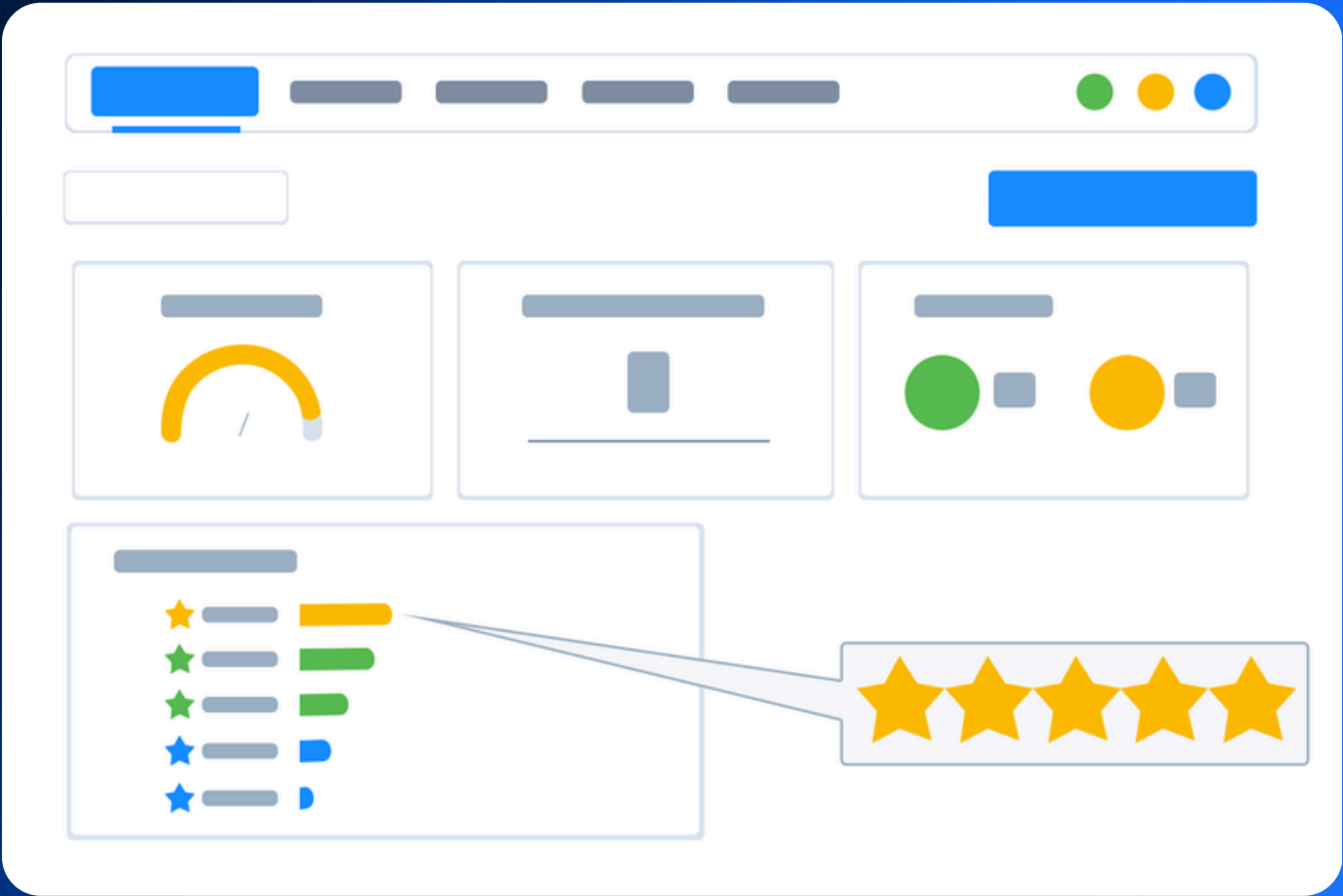


REFERENCE GUIDE

Reputation

Reviews, Requests, and Replies



Dashboard and Tabs

What It Is

The Reputation Overview is your dashboard. It shows review counts, ratings, sentiment, and trends, and every other Reputation tool is one click away.

How It Works For Your Business

- Search for Reputation to land on Reputation Overview.
- Cards include Invite Goals, Reviews Received, Avg Rating, Sentiment, Invite Trends, Review Trends, Latest Review Requests, and Latest Review.
- Click the three dots on a card to change its timeframe. Each card keeps its own setting.
- You will also see Requests, Reviews, Widgets, Listings, Video Testimonials, and Settings.
- New accounts may show a Guided Review Setup Wizard checklist that disappears when every task is done.

Dashboard and Tabs – Tips & Guidelines

Tips

- Change the timeframe on Reviews Received to see this past month.
- Invite Goals can't be edited. It steps up as you hit each target.
- Sentiment uses the stars when a review has no words.
- The Online Listings card only shows if that add-on is on.

DO

- Set each card's timeframe
- Check Overview weekly
- Click through every item once
- Finish the Setup Wizard

DON'T

- Expect Invite Goals to be editable
- Assume one timeframe fits all
- Ignore the three dots
- Panic if the wizard is gone

Connecting Review Sites

What It Is

Your software can only pull in reviews from sites you connect. You connect them once on the Integrations tab, and then reviews flow into one list.

How It Works For Your Business

- Search for Reputation, open Settings, then the Integrations tab.
- On Google Business Profile, click Connect account, sign in, approve access, and choose your location.
- On Facebook, click Connect account, log in, allow access, and choose your business page.
- For other sites such as Yelp or Trustpilot, click Connect account, paste your review page URL, and click Connect.
- Open the Sources dropdown on Reviews to confirm your connected pages appear as chips.

Connecting Review Sites – Tips & Guidelines

Tips

- Sign in with the account that manages the listing or page.
- Allow pop-ups for your software if no login window appears.
- Confirm the right location if you have several.
- Connect only the sites where customers really leave reviews.

DO

- Log in as the page manager
- Paste the direct review page link
- Check the Sources dropdown
- Connect Google first

DON'T

- Block pop-ups
- Paste your home page link
- Rush past the location picker
- Connect sites nobody uses

Review Link and Templates

What It Is

The review link decides where customers land. Your SMS and email templates decide what they read. Together they decide whether a request turns into a review.

How It Works For Your Business

- In Settings, the Review Link section offers Review Balancing or a Custom Link.
- Review Balancing spreads requests across your connected platforms. Google must be connected to be included.
- A Custom Link sends every customer to the one page you paste in.
- SMS Requests and Email Requests each have an on switch, timing, repeat interval, Maximum retries, and a default sender.
- Create New builds a template. Use the review link custom value in texts and the Review Link or Review Links element in emails.

Review Link and Templates – Tips & Guidelines

Tips

- Keep texts short and read them out loud before saving.
- Choose a retry count you would be comfortable receiving.
- Use a plain email subject so it avoids junk.
- Review Links, with an s, lets you reword, reorder, and hide platforms.

DO

- Start with Review Balancing
- Set a default sender
- Preview before saving
- Test the link yourself

DON'T

- Skip the review link
- Write long texts
- Use spammy subject lines
- Set endless retries

Requests and Bulk Sending

What It Is

A review request is a message that asks a contact for a review. You can send one by hand, send to many contacts at once, or share a QR code for in-person asks.

How It Works For Your Business

- On Overview or Requests, click Send Review Request, choose a contact, pick SMS, Email, or WhatsApp, and click Send.
- Use Quick Actions, if your top bar shows it, to send a request from anywhere in your software.
- Statuses are Queued, Sent, Delivered, and Failed. Emails often stay on Sent.
- For bulk, select contacts in Contacts and use the bulk action Send Review Request, then watch them land in Requests.
- Generate the digital QR code for your review link and download it to use on print or signs.

Requests and Bulk Sending – Tips & Guidelines

Tips

- Ask right after a win. Timing beats wording.
- Each channel needs the right contact info.
- Fix the phone or email on a Failed request, then resend.
- Requests send under the name of whoever is logged in.

DO

- Check the contact first
- Watch statuses
- Use search and filters
- Download the QR code

DON'T

- Send to the wrong person
- Ignore Failed ones
- Wait weeks to ask
- Assume email confirms

Reading and Replying

What It Is

The Reviews tab collects reviews from every connected site in one list. You can filter, read sentiment, reply, and add offline reviews.

How It Works For Your Business

- Search for Reputation, then open Reviews. The newest reviews show first.
- Use the Sources dropdown plus rating and date filters to narrow the list.
- Each review has a sentiment label. Reviews flagged as spam deserve a closer look before you reply.
- Click a review, type a reply, and post it. The reply goes back to Google or Facebook.
- Click Add Reviews, then Add Manually, and fill in the form to log a real offline review. It shows under Manual Pages.

Reading and Replying – Tips & Guidelines

Tips

- Check one and two star reviews weekly.
- Thank by name and mention one detail on good reviews.
- On bad reviews, say sorry and offer to fix it offline.
- Keep replies under four sentences.

DO

- Reply calmly
- Filter by rating weekly
- Look at spam flags
- Log only real reviews

DON'T

- Argue in public
- Reply when angry
- Make up a review
- Ignore bad reviews

Reviews AI Replies

What It Is

Reviews AI writes review replies for you. In Suggestive mode it drafts a reply you edit and send. In Auto-Pilot mode it replies on its own by star rating.

How It Works For Your Business

- Turn on Reviews AI in Reputation Settings.
- In Suggestive mode, click the AI Reply button on a review, regenerate if you want another take, edit it, and send.
- In Auto-Pilot mode, set the response for each star rating and a wait time before it sends.
- Add a personal footer so replies end with your own sign-off, and choose the platforms, Google and Facebook.
- AI-Powered Review Summaries and the Reviews AI Agent getting-started screen help you see the big picture.

Reviews AI Replies – Tips & Guidelines

Tips

- Start with Suggestive so you read every reply first.
- Edit each draft so it sounds like you.
- Use a wait time so replies don't look instant.
- Check Auto-Pilot replies after they go out.

DO

- Edit AI drafts
- Add a personal footer
- Review Auto-Pilot replies
- Start in Suggestive mode

DON'T

- Send drafts unread
- Trust Auto-Pilot blindly
- Skip the wait time
- Use one reply for all stars

Review Widgets

What It Is

A review widget shows your reviews on your website or funnel. You choose the layout, content, and look, then copy the code to place it.

How It Works For Your Business

- Open Widgets in Reputation and click Create widget.
- Layout tab: pick sources, a type such as List, Grid, Masonry, Carousel, Slider, or Flash, the review count, and minimum rating.
- Content tab: set a heading, description, and slider interval.
- Appearance tab: choose Light, Dark, or Custom, plus fonts and colors. Settings tab: dates, avatars, and hiding ratings-only reviews.
- Click the Code icon, then Copy Code, and paste it into a custom HTML block, or use the Reviews element in a funnel.

Review Widgets – Tips & Guidelines

Tips

- Set a minimum rating to show your best reviews.
- Match the widget colors to your site.
- Preview before you copy the code.
- Hide ratings-only reviews for a cleaner look.

DO

- Pick a layout that fits
- Set a minimum rating
- Preview the widget
- Copy and paste the code

DON'T

- Show every review blindly
- Clash with site colors
- Skip the preview
- Forget to paste the code

Workflow Requests and Triggers

What It Is

Workflows can send review requests for you and react when a new review arrives. This keeps asking and following up steady without manual work.

How It Works For Your Business

- Search for Workflows and start with a trigger such as Appointment Status showed, Invoice Paid, or Pipeline Stage Changed.
- Add a Wait step, then the Send Review Request action with the Email or SMS channel.
- Workflow requests send from the assigned user. Recurring review request emails can use multiple templates.
- The New Review Received trigger can filter by rating. Add an If/Else on star rating to branch.
- For low ratings, add an Internal Notification or tag the contact. Check enrollment history to confirm a review fired the workflow.

Workflow Requests and Triggers – Tips & Guidelines

Tips

- Add a Wait so the request doesn't feel rushed.
- Check Requests to see workflow requests land.
- Alert your team fast on low ratings.
- Use enrollment history to test your trigger.

DO

- Test with one contact
- Add a Wait step
- Branch by star rating
- Notify on low ratings

DON'T

- Send instantly every time
- Skip testing
- Ignore low-star alerts
- Forget the channel

Disputes and Online Listings

What It Is

You can dispute a Google review you believe breaks the rules and check its status. The Listings tab helps you keep business listings accurate and healthy.

How It Works For Your Business

- To dispute, find the contact in Conversations, click the Dispute this review button, and confirm your Google account.
- You can report a review to be removed or check the status of one you already reported, and submit an appeal.
- Disputes have a limit for reviews not generated through the system.
- On Listings, view the business scan report, the listing status card on Overview, and manage listings.
- Use the Profile Progress Tracker and Health Score, and schedule an automated listings performance report.

Disputes and Online Listings – Tips & Guidelines

Tips

- Dispute only reviews that truly break the rules.
- Check the dispute status instead of resubmitting.
- Keep name, address, and phone the same everywhere.
- Schedule the performance report so it arrives on its own.

DO

- Confirm the Google account
- Check dispute status
- Review your scan report
- Schedule the report

DON'T

- Dispute honest bad reviews
- Resubmit over and over
- Ignore wrong listings
- Skip the health score

Key Terms Glossary

Review

A public rating and comment a customer leaves about your business.

Overview

The dashboard tab that shows review counts, ratings, and trends.

Sentiment

A positive, neutral, or negative label your software gives each review.

Integrations

The Settings tab where you connect Google, Facebook, and other sites.

Review Balancing

A setting that spreads review requests across connected platforms.

Custom Link

A setting that sends every customer to one review page.

Review request

A text, email, or WhatsApp message asking a contact for a review.

Delivered

A status showing the request reached the contact, mostly confirmed on texts.

Sources filter

A dropdown that limits the review list to chosen connected sites.

Reviews AI

A tool that drafts or sends review replies for you.

Widget

A block that shows your reviews on your website.

Health Score

A listings measure of how complete and accurate your profile is.

Getting Help

Your software changes over time, so a button or screen may look different from what you see here. If something doesn't match, check the in-app help for Reputation and look for the option with a similar label.