



Table of Contents

1 Engage Overview	4
Set Up Engage	5
2 Admin	7
Authorize an Account	9
Remove an Account	9
Restore an Account	10
Preferences	11
Available Hours	11
Out of Office Response	12
Profanity Options	12
Report Email Group	12
Send Report via SMS or Slack	
	11
Custom Sentiment	
Sentiment Colors	
Sentiment Colors	
Sentiment Colors Sentiment Rules	
Sentiment Colors Sentiment Rules. 3 Queues Getting Started Create a New Queue. 4 Inbox Getting Started	
Sentiment Colors Sentiment Rules	
Sentiment Colors	

5 Segments	27
Getting Started	
Create a New Segment	
Apply a Segment	
6 Tags	
Getting Started	
Create Tags	
Create Auto Tag Rules	
7 Dashboards	
Getting Started	
Build a Dashboard	
Configure a Widget	
Set Dashboard Filters	
To customize the widgets, use the top-line filters.	
Filter the Dashboards	
Top-Line Filters	
Widget Specific Options	
8 Reports	
Getting Started	
Create a Report	
Create a Dashboard Report	
Create a Scheduled Dashboard Report	
View the Report History	
View the Dashboard Report Schedules	
Edit Reports	
9 Resolutions by User	
Getting Started	
Resolutions by User Chart	
Sort the Chart	

10 Premium Paid Services	52
11 Additional Resources	54

1 | Engage Overview

Engage Overview

Engage is a centralized location to quickly help customers who are reaching out to your brand. Each time a customer reaches out, a conversation is created; respond directly to the user from this conversation or have an internal message discussion with a team member about the conversation.

Engage actively collects social comments or direct messages. It currently supports LinkedIn (social comments only), Facebook (DMs and social comments), Instagram (DMs and social comments), Threads (DMs and social comments), and X (formerly known as Twitter). The table below explains the types of messages used in Engage:

Network	Message Types Received	Limitations
Twitter	@mentions, direct messages, and replies to content in real time	N/A
Facebook	Public @mentions, messages via Mes- senger, comments on content, com- ments on boosted posts, and comments on ads in real time	It is only possible to retrieve public con- tent. Users @mentioning business pages in private posts cannot be retrieved. Replies cannot be made through Messen- ger after seven days.
Instagram	Public @mentions, comments on own posts, and messages via Messenger in real time	Engagements for stories, reels, and IGTV are not available. Instagram only allows replying to comments on your own media. While the platform ingests @mentions, they cannot be replied to via this platform.
Threads	Comments on posts	Threads data is only collected once every 24 hours.
LinkedIn	Comments on posts	LinkedIn data is only collected once every 24 hours. Engagements from direct mes- sages and mentions of organizations are not collected at this time.

Set Up Engage

Setting up Engage consists of two parts: integrating the business social accounts and organizing an internal process for responding to engagements.

- 1. Integrate the business social accounts.
 - a. Add credentials, preferences, and custom sentiment rules.
 - \circ To complete this part of the set up, the user must have the correct permissions.
 - For more instructions, see the <u>Admin section on page 9.</u>

- 2. Organize the internal response process.
 - a. Create Queues and queue rules.
 - For more instructions, see the Queues section on page 18.
 - b. Filter the Inbox.
 - For more instructions, see the <u>Inbox section on page 22.</u>
 - c. Create Segments.
 - For more instructions, see the <u>Segments section on page 29.</u>
 - d. Create Tags and tag rules.
 - For more instructions, see the <u>Tags section on page 33.</u>
 - e. Create Dashboards.
 - For more instructions, see the <u>Dashboards section on page 37.</u>
 - f. Create and schedule Reports.
 - For more instructions, see the <u>Reports section on page 44.</u>
 - g. View the Resolutions by User.
 - For more instructions, see the <u>Resolutions by User section on page 51.</u>

2 | Admin

Admin

The following Engage options are only available with certain admin permissions.

- **Credentials**: Authorize specific social accounts to integrate with Engage.
- **Preferences**: Set preferences for Engage such as available hours, an out of office response, and profanity filters.
- **Report Email Group**: Create a group of emails to easily send reports to.
- **Custom Sentiment**: Customize the criteria for the sentiments assigned to engagements.

Credentials

On the **Credentials** page, add the social accounts to integrate with Engage. This consolidates the public and private messages from each account.



To access Credentials,

1. Go to **Engage > Credentials**.

The **Credentials** page displays the accounts Engage is connected to. Use the tab for Facebook/Instagram, Google Business Profile, LinkedIn, Threads, TikTok, X, YouTube, and Assistant to view the list of available accounts for each social network or authorize a business account for that network.

Accounts authorized in this section are used to collect and respond to incoming messages and engagements. View details about message sources						
FACEBOOK/INSTAGRAM GOOGLE BUSINESS PROFILE LINKED	DIN THREADS TIKTOK X YOUTUBE ASSISTANT					
Publish posts to any public Business Page you have access to.	Publish posts to any public Business Page you have access to.					
Attribute Filters V Q. Search Account Name				+ Authorize Account		
NAME	LOCATION	TYPE	STATUS	AUTHORIZED BY		
f		User		CS		
f		Page		CS		
Rows per page 50 🗸 1						

Authorize an Account

To authorize an account,

1. Click Authorize Account.

+ Authorize Account

- The network for the account opens.
- 2. Sign in to the business social account.
 - The account automatically integrates with Engage.

FACEBOOK/INSTAGRAM GOOGLE BUSINESS PR	OFILE LINKEDIN THREADS TIKTOK X YOUTUBE ASSISTANT			
ublish posts to any public Business Page you h	ave access to.			
ttribute Rilters ∽ Q. Search	Account Name			+ Authorize Account
NAME	LOCATION	TYPE	STATUS	UTHORIZED BY
f		User		CS.
f		Fage		CS.

- **Name**: The name of the social account.
- Location: The business location the social account is connected to.
- **Type**: The type of account.
- **Status**: When the status is green the account is connected to Engage. The status is red if the connection needs to be reauthorized.
- Authorized by: The user who created the account link.

Remove an Account

To remove an account,

- 1. To the right of the **Authorized By** column, hover over the row of the account to delete.
- 2. Click the delete icon.
 - A pop-up displays to confirm the removal of the specific integration.

		×	
EDIT INTEGRATION: WEB DESIGNS			
Remove the ability to post to Web Designs from this platform?			
	Cancel Re	emove	

- 3. Click Remove.
 - The account remains visible in the list, with an information icon in the **Type** column.



4. Click the delete icon again to remove the account from the list.

Restore an Account

To restore an account integration,

- 1. To the right of the Authorized By column, hover over the row of the account to restore.
- 2. Click the edit icon.
 - A pop-up displays to confirm the restoration of the integration.



3. Click Allow.

Preferences



To access **Preferences**,

1. Go to **Engage > Preferences**.

Available Hours

Use the table to set the hours customers can expect a response to their messages. This can be used to track response times.

Available Hours —		
Choose your available hours displayed in America/Denver.	using the table below. This schedule can be	e used to track response times. Times are
	Start Time	End Time
Sunday	09 🗸 00 🗸 AM 🗸	05 🌱 00 🜱 PM 🜱
Monday	09 \checkmark 00 \checkmark AM \checkmark	$05 \lor 00 \lor PM \lor$
Tuesday	$09 \sim$ $00 \sim$ AM \sim	$05 \lor 00 \lor PM \lor$
Vednesday	09 V 00 V AM V	$05 \lor 00 \lor PM \lor$
Thursday	$09 \vee$ $00 \vee$ AM \vee	$05 \lor 00 \lor PM \lor$
Friday	09 \vee 00 \vee AM \vee	$05 \lor 00 \lor PM \lor$
Saturday	09 ¥ 00 ¥ AM ¥	05 × 00 × PM ×
		Save

- 1. Select the available hours for Engage.
- 2. Click Save.

Out of Office Response

Click the radio button to enable an automatic out of office response for messages received outside the set available hours. This is limited to 2,000 characters.

Out of Office Response	
Enable an automatic out-of-office response for messages received outside of available hours (limited to 2,000 characters)	\bigcirc
	0
	Save

Profanity Options

Enable and disable the option to automatically hide comments containing profanity or other keywords for Facebook. The comments are still visible by page admins, the comment author, and friends of the author.

- 1. Click the radio button to enable/disable the profanity filter.
- 2. To add additional words to the filter, click Add.



Report Email Group

To share reports with the same group of people every time, create an email group. Email groups save the time of entering multiple email addresses for each report. Set it up once, and the platform automatically delivers the report to their inbox according to the report schedule settings.

Ş	Social Suite	>	Tags
Ń	Listen	>	Resolutions by User
0	Engage	>	Report Email Groups
\boxtimes	Publish	>	Preferences
\$	Requests	>	Custom Sentiment

To access Report Email Group,

1. Go to **Engage > Report Email Group**.

2. Click Add Email Group to enter the email addresses of those who should receive reports.

Email 🗸			Q Search Messengers
EMAIL			+ Add Email Group
NAME	CREATED BY	EMAILS	ACTION

- Create as many email groups as needed. For instance, one for a direct team, one for the senior leadership team, one for the CX team, and so on. After they are created, all email groups appear in the Add Email Groups drop-down when scheduling reports; simply click on the group(s) to receive the report.
- 3. Enter the sender's (Messenger) name.

Edit Messenger Messenger Type: EMAIL		×
Name Messenger Name		
Add Email		
	Save	Cancel

- The **Messenger Name** can be your name, the department or team name, or something/ someone else. Choose something recipients will recognize.
- 4. Add the email address(es) of the person/people to include in this group.
- 5. Save the email group.
- 6. Repeat the steps above to create as many groups as needed.

Send Report via SMS or Slack

1. In the top left corner of the **Report Email Groups** page, select **SMS** or **Slack** and follow the steps listed above, adding phone numbers or workspaces instead of email addresses.



Custom Sentiment

The **Custom Sentiment** page provides customization for the sentiments assigned to engagements.



To access Custom Sentiment,

1. Go to Engage > Custom Sentiment.

Sentiment Colors

By default, a positive sentiment is green, a neutral sentiment is blue, and a negative sentiment is red.

Click Update Information to change the colors for a positive, negative, or neutral sentiments.

Sentiment Colors		
Positive Color	#52D351	
Negative Color	#EE2F45	
Neutral Color	#0991dDD	
	Update Information	
Sentiment Rules		+ Add Rule
Use sentiment rules to change how	a particular word or phrase categorized into our sentiment learning API. You can change these	e whenever you wish.
Rules are applied globally for your D	Department to Listen, Engage, and Publishing	
To add a sentiment rule click the 'Ao	Id Rule' button, then use the sentiment slider to indicate whether you want the rule to be cate	gorized as 'Positive', 'Negative', or 'Neutral'

Sentiment Rules

Sentiments for engagements are automatically assigned depending on the words used in the message. Create custom rules for specific words to trigger certain sentiments.

These rules apply globally for Listen, Engage, and Publish.

To add a sentiment rule,

1. Click Add Rule.

Sentiment Rules + Add Rule

2. Enter a word to create a rule for the sentiment.



3. Use the sentiment slider to indicate if the word should be categorized as Positive, Negative, or Neutral.

Sentiment Rules					+ Add Rule	
Use sentiment rules to change how a particular word or phrase categorized into our sentiment learning API. You can change these whenever you wish.						
Rules are applied globally for your Sub-Account to Listen, Engage, and Publishing	Rules are applied globally for your Sub-Account to Listen, Engage, and Publishing					
To add a sentiment rule click the 'Add Rule' button, then use the sentiment slider to indicate whether you want the rule to be categorized as Positive', Negative', or 'Neutral'						
Charge sentiment for the following phrase:	Negative	Neutral	Positive			
Enter word or phrase here				Active	Cancel	
6						

4. Click Create.

3 | Queues

Queues

Use the **Queues** page to filter content and easily respond to different types of engagements. Queues can automatically assign a new engagement to a specific user based on the queue rules.

Getting Started



To access **Queues**,

1. Go to **Engage > Queues**.

• The list of queues displays the number of engagements from the last 24 hours and the assigned users.

II QUEUES + Create New Queue			Queue Details
Queue name	Last 24 hours	Assigned users	Please select a queue to edit.
Team 2	0	0	
	0	0	
	0	0	
	0	0	

- Each new engagement that matches the rules for the queue is automatically assigned to the selected user(s).
- An engagement that matches multiple queues is viewable under each queue. To avoid multiple users answering the same engagement, it is assigned to the first user to click on it.

2. Click a queue to view and edit the rules and assigned users.

All Queues + create New Queue				Queue Details	
Queue name	Last 24 hours	Assigned users		Queue Name:	
Name				Name	
			_	Parent Queue:	
				Nest under	~
				Assigned Users Only these users (and administrators) will be able to see and work from this queu	ie
				Add User	~
				Rules All inbound messages matching the following rules will be added to this queue	
				Engagement Text \checkmark contains \checkmark Hi	
				+ Add rule	
				+ Add rule group	
				Save	

3. Click the ellipsis to the right of the queue to open the queue in **Inbox** or delete the queue.

All Queues	+ Create New Queue	•		
Queue name		Last 24 hours	Assig	gned users
Name		0		Open queue
				Delete Queue

Create a New Queue

When a queue is created, it only pulls engagements submitted after the queue creation; past engagements are not pulled into the queue.

- 1. Click + Create new queue.
- 2. Give the queue a name.
- 3. (Optional) Under the Parent Queue drop-down, nest the queue under another.
- 4. Add users.
 - The drop-down list displays the users who have access to the queue. Only these users (and administrators) are able to see and work from this queue.

Rules		
All inbound messages mate	hing the follow	ing rules will be
added to this queue		
Engagement Text \checkmark		
AND		
Network \checkmark = \checkmark		<u> </u>
	Instagram	n ×
+ Add rule		
0.0		
OR		
Engagement Text \smallsetminus	contains \checkmark	Test
	contains *	lest
+ Add rule		
		🗑 Delete
+ Add rule group		

- 5. Add the queue rules.
 - Queues cannot be saved without rules. There are many fields that can be added as a rule type.
 - Engagement Text and Network are examples of frequently used rule types.
 - The rules are separated by AND. This means an engagement is only assigned to the queue if every rule applies.
 - The rule groups are separated by OR. This means an engagement is assigned to the queue if one of the rule groups can apply.

Example

This queue is for certain users to see all Instagram content that is not a private message:

- 1. Click + Add rule.
- 2. Select Network.
- 3. Select =.
- 4. Select Instagram.
- 5. Click + Add rule.
- 6. Select Is Private Message.
- 7. Select =.
- 8. Select False.
 - Because this rule displays content other than private messages, add an Engagement Text rule to filter out some of the spam messages.

4 | Inbox

Inbox

In the **Inbox**, organize and respond to consolidated private and public messages from across multiple social media platforms.

Getting Started



To access Inbox,

1. Go to **Engage > Inbox**.

The **Inbox** page is split into four columns:

- 1. Queue
- 2. Message List
- 3. Message Context
- 4. Internal



Queue Column

All Engagements 🛈	184
Team 2	
Unsorted Engagements	111

The queue column shows the total number of sorted and unsorted engagements. Under the total engagements the names from the queues are listed.

- 1. Click a queue to filter the inbox to the assigned engagements.
 - This filters all the other columns on the page.

Message List Column



The message list column displays all the available engagements.

- 1. Click on an engagement to open it in the message context and internal columns.
 - The comment icon indicates the engagement is a public comment.



• The message icon indicates the engagement is a private message.





At the top of the column, click **Select All** or the check box on individual messages to apply a status to the engagement.

Use the **Actions** drop-down to mark groups of messages as resolved/unresolved, change the sentiment, and add or remove tags.

- Mark as Resolved
- Mark as Unresolved
- Change Sentiment to Positive
- Change Sentiment to Neutral
- Change Sentiment to Negative
- Add/Remove Tags

	O	@ 11mt	th •	to @		۵ 🔾
	'll be re nent wi		ust	booke	d my	/ appoint-
	+ Tag					
I	Neutr	al $^{\vee}$				

To apply these options individually to messages,

• Click the empty circle in the top right corner of the message to mark the message as resolved. Click it again to unresolve.



• Click the person icon in the top right corner to assign the message.



• Use the sentiment drop-down at the bottom of the message to assign a sentiment to it.



• Click **+Tag** to add a tag to the message.



Message Context Column



When a message is selected and open in the message context column,

- 1. Use the drop-down at the top of the column to mark the conversation as resolved, unresolved, or dismissed.
- 2. Click the dots in the top right corner of the column to redact the engagement or delete a social comment.
 - Assign Queues: Assign the message to a queue.
 - **Redact Message**: Redacting a message hides the entire engagement history in the platform and any incoming messages are not shown.
 - **Delete Social Comment**: While social comments can be deleted, private messages cannot be (this only applies to Facebook).

Internal Column

When a message is selected, the tabs in internal column populate. All information, messages, discussions, and notes in this column are only visible to the internal team and do not appear publicly.



- Author: Displays information about the author of the message and the engagement history.
- Author Discussion: Includes internal notes about the author. If this author posts another message these notes are available.
- **Post Discussions**: Includes internal notes about the post. This is for the specific engagement and is not connected to the author.
- Responses: Displays the responses to the post.

Top-Line Filters

Use the top-line filters to sort the messages that are visible in the columns.

Social Ad	counts All 🛆 Time Last 12 Months 🗠 🛛 🖓 Othe	ar Filters 🗠
Social Ne	twork All \sim Location ID (0) (0) \sim	() etrain
Attribute	Filters 🗸	utation
Select All	Clear All Selected	Ja
n f		
□ f		
o f		Fe
o f		
0		
_ 0		
🗆 in		ntactin
u m		ington 101. O
🗆 in		er is cu ll be ba
		you ne
		sistand 2 office
- v		prod
		ge

To filter by social accounts,

- 1. Click the **Social Accounts** drop-down.
- 2. Check the boxes for one or more social accounts to display the messages from each account in the inbox.

To filter by Time,

- 1. Click the **Time** drop-down.
- 2. Select a date range or create a custom date range.
- 3. Click Apply Date Range.

Time Last 12 Months 🔨 🗸 Other Filters 🗸						
Start Date Time	Last Hour	Today	February 2025			
Feb 11, 20 📛 12:00 AM 🕓	Last 3 Hours	Yesterday	January 2025			
tr End Date Time	Last 6 Hours	Last 7 Days	Last 3 Months			
© Feb 11, 20 📛 11:59 PM . €	Last 12 Hours	Last 14 Days	Last 6 Months			
	Last 24 Hours	Last 30 Days	Last 12 Months			
in Apply Date Range Cancel						
Unrentry crusey, we						

♥ Other Filters ヘ	
Show Unresolved	+
Assigned To Anyone	+
Sort By Oldest First	+
Message Type All	+
Tags All	+

To apply other filters,

- 1. Click the **Other Filters** drop-down.
 - Show: Sort by Unresolved, Resolved, All
 - Assigned To: Sort by assigned messages
 - Sort By: Oldest First or Newest First
 - Message Type: All, Public, or Private
 - Tags: Sort by tags.

5 | Segments

Segments

Use the **Segments** page to create specific filter groups. These groups can be defined by criteria for a post and rules for when they occur. This adds extra filtering options to dashboards, providing additional views for deeper analysis of post data.

Getting Started



To access Segments,

1. Go to **Engage > Segments**.

Create a New Segment

1. Click Add New Segment.



2. Name the segment.

Create Segment		×
Group		
Field		\checkmark
Name Segment Name		
Rules		
+ Add rule group		
	Cancel	Save

3. Click **Add rule group** to add a conditional rule to a segment.

Croate Segment		×
Create Segment		
Group		_
No Group	~	/
Name		
Test		
Rules		
Is Comment \lor = \lor true	~	
+ Add rule		
+ Add rule group		
	Cancel Save	

- If needed, add additional rules by clicking Add rule.
- The rules are separated by AND. This means the segment filters only the messages that match with every rule.
- The rule groups are separated by OR. This means the segment filters the messages if they are categorized under at least one of the rule groups.
- 4. Click Save.
 - The segment displays.

To create a groups to organize the segments,

- 1. Click Add New Group.
- 2. Type a group name.
- 3. Click Save.

		×
Create Group		
Name		
Example		
	Cancel Save	

Apply a Segment

Г

YOUR SEGMENTS (1)	CLEAR ALL
+ Create New Segment	
Segments	
$\mathbb{Q}_{\mathbf{x}}$ Search by Name	
No Group 1 selected	^
 Contains Media Paid Facebook Ads 	

To use the segment,

- 1. Go to **Engage > Dashboards**.
- 2. Click a dashboard title to open it.
- 3. Click the Segments filter at the top of the page.
- 4. Find the Segment and select it.

6 | Tags

Tags

Tags are used to flag and organize individual mentions collected into Engage. Use groups to organize the tags for easy access.

Getting Started



To create tags and tag rules,

1. Go to **Engage > Tags**.

Create Tags

On the right side of the **Tags** page, the tag groups and the unsorted tags are listed under drop-downs.



Tags ^①	B
Color \checkmark Name	
Group	→ + New Group
	Cancel Save

To create a new tag or tag group,

- 1. Click the green plus in the right corner.
- 2. Click New Tag.

- 3. Assign the tag a color.
- 4. Assign the tag a name.

Tags ⁽⁾	
Color 🗸 Name	
Test	+ Add Cancel
	Cancel Save

- 5. Click the **Group** drop-down to select a group for the tag.
 - a. Click **+New Group** to create a group for the tag.
 - b. Type the group name.
 - c. Click +Add.

1. Click +Create Rule.

6. Click Save.

Create Auto Tag Rules

On the left side of the **Tags** page, create rules to automatically tag incoming mentions. It is possible to add or remove tags for each message if necessary.

Auto Tagging	
Let us take care of the heavy lifting. Create rules for automatically tagging incoming mentions. You can always add and remove tags afterwards to further curate your groupings.	
+ Create Rule	
You have no auto tagging rules	
	×
Create Auto Tagging Rule	
Create rules for automatically tagging mentions as they are collected in your monitors.	
Name of this rule	
Auto Tagging Rule Name	
Rules	
Engagement Text \vee	
+ Add rule	
+ Add rule group	
• •	
Apply these tags	
• •	\sim

Rules			
Is Comment \vee	= 🗸	true	~
+ Add rule			

- 2. Type the name of the rule.
- 3. Under **Rules**, use the drop-down to select the criteria to tag by.

- 4. Complete the two defining fields that display.
 - Example: Is Comment = True

Rules		
Is Comment \checkmark = \checkmark true		\sim
AND		
Language \checkmark = \checkmark English	\sim	
+ Add rule		

Rules	
Social Account \checkmark = \checkmark Social Accounts (1)	~
+ Add rule	
OR	
Engagement Text \checkmark	
+ Add rule	
	🗑 Delete

Apply these tags	
1 tags applied	~
TEST (1)	^
EXAMPLE	
+ Create Tag	

- 5. Click +Add rule to add more rules.
 - These rules are separated by AND. This means a message is only tagged if every rule applies.
- 6. Click **+Add rule group** to add additional rule groups.
 - The rule groups are separated by OR. This means a message is tagged if at least one of the rule groups can apply.
- 7. Under **Apply these tags**, click the drop-down to select the tag group for the rule.
 - a. Click **+Create Tag**, to create a new tag for the rule.
 - b. Click the drop-down arrow to the right of a tag group to select the individual tags in a group.

7 | Dashboards
Dashboards

The **Dashboards** page features all the dashboards created to track the metrics that matter most. Build custom dashboards to deliver timely, actionable insights.

Getting Started



To access the Dashboards,

1. Go to **Engage** > **Dashboards** to locate the dashboards in a tile view.

On the landing page:

- Sort, Delete, or Archive: Use the drop-down menus to see specific dashboards; click the ellipsis to delete or archive old or unused dashboards.
- Create Folders: Organize the dashboards by source, location, or other categories for easy viewing and sharing.
- Edit, Report, Duplicate, Archive, and Delete: Within each dashboard, edit details, generate reports, and more.

Status ACTIVE 🗸								Q Search Dashboards
Folders								🕼 Create Folder
All Dashboards								
Dashboards						Alphabeti	cal V Created by Anyone V	+ Create Dashboard
			8					
Date Created: May 24, 2024 Date Modified: May 24, 2024 Last Activity: January 27, 2025	C	Date Created: April 10, 2023 Date Modified: December 26, 202 Last Activity: January 27, 2025 My Last View: December 26, 2024			Date Created: De Date Modified: De Last Activity: Deo My Last View: De	ecember 3, 2024 ember 30, 2024		
1 🛍 💿 WIDGET PUBLIC VIEWABLE		17 📸 WIDGETS PUBLIC	EDITABLE	0	0 WIDGETS	M PUBLIC	© VIEWABLE	
	RA							
Date Created: September 25, 2024 Date Modified: September 25, 2024 Last Activity: September 25, 2024								
0 the Section of Section 1.1 to the Section 1.1 to								

Build a Dashboard

To create a new dashboard,

1. Click the **Create Dashboard** button in the right corner to display the **New Dashboard** popup.



- 2. Give the dashboard a title.
- 3. Choose the status of the dashboard.

Dashbo	pard title	
Private		٠
Public	View Only	0
Public	Editable by entire department	0

- Private: Only you can view & edit.
- Public—View Only: Others in the organization can see the dashboard, but cannot make changes.
- Public—Editable: Users can view and edit this dashboard.
- 4. Click Add Row to add widgets.



5. Click Configure Widget.



Configure a Widget

Configure Widget	Visualization	Image	Text
Configure by			
When Dynamic is selected the widget will a data pertaining to the location(s) they are a		widget. The view	er will only see
Static Account(s) Dynamic			
Attribute Filters \checkmark			
Data Module Engagements			~
engagements			Ý
Data Submodule			
Data Submodule Engagements			~
Engagements			~
Engagements			~
Visualization Settings			~

- 1. Choose Static Accounts or Dynamic.
 - When **Static Accounts** is selected the widget displays the same way for every viewer.
 - When **Dynamic** is selected the widget adjusts depending on who is viewing the widget. The viewer will only see data pertaining to the location(s) they are assigned to.
- 2. Select additional attribute filters (Location, City, Brand, etc.).

- 3. Select a Data Module: Engagements or Posts.
- 4. Select the **Data Submodule**.
- 5. Select the Visualization.
 - a. Click **Settings** to determine what will be shown in a report.
- 6. Select a time frame.
- 7. Click the **Image** tab to add an image to personalize the widget thumbnail.
- 8. Click the **Text** tab to add more text to personalize the widget thumbnail.

Set Dashboard Filters

To customize the widgets, use the top-line filters.

A Dashboard Title 🧷	B 🗄 Last 30 Days 🗸	\mathbf{C} $\mathbf{\nabla}$ Segments $\mathbf{\vee}$	D 🕸 …
E × Select × Filter +			
ENGAGEMENT LEADERBOARD My Social Accounts NO SEGMENT	LAST 30 DAYS		= F

	Filter	Description
Α	Dashboard Title	Click the pencil icon to update the title for the dash- board.
В	Date	Click the down arrow to create a custom date range or select a date range to apply to the widgets in the dashboard.
С	Segments	Click the down arrow to add a Segment or search the dashboard for a specific rule. For more information on Segments, see the <u>Segments section on page 29</u> .
D	Command Center Mode Ellipsis	 Command Center Mode: This opens a live feed that cycles through a display of the metrics from the dashboard. Ellipsis: Generate a report, share a link to the dashboard, or archive the dashboard.
E	Custom Filter	Click Filter+ to add extra filters (such as brand, city, location, etc.) to the widgets in the dashboard.
F	Widget Specific Filters	 Drag and drop: Click the two lines to drag and drop the widgets into the desired order. They can be viewed as individual rows or up to three across. Ellipsis: Edit the widget, make the widget full screen, duplicate the widget, or delete the widget.

Filter the Dashboards

After the necessary dashboards are created, use the top-line filters on the **Dashboard** page or the widget specific filters to sort the various dashboards for maximum usability.

Top-Line Filters

Status ACTIVE 🗡 🔥		B Q Search Dashboards	
Folders		C Create Folder	
All Dashboards			_
	D	E F G	6
Dashboards	Alphabetical \checkmark	Created by Anyone \checkmark + Create Dashboard	
107 Sec. 8 (84-10)	LR	SA	

	Filters	Description
Α	Status	View all dashboards, only active dashboards, or only archived dashboards.
В	Search	Use keywords to search for a specific dashboard.
С	Create Folder	Create as many folders as needed to organize the dashboards. Drag and drop dashboards into different folders.
D	Alphabetical	Sort by alphabetical, newest created, oldest created, or most recently used.
E	Created by	Sort by created by anyone, created by me, used by me, or system generated.
F	Create Dashboard	Create a new dashboard. For more information, see the <u>Build a</u> <u>Dashboard section on page 38</u> .
G	Bulk Dashboard Actions	Clear a selection, restore selected dashboards, archive selected dashboards, or delete selected dashboards.

Widget Specific Options





The widget specific options are only available on dashboards that are editable.

- 1. Click the ellipsis in the right corner of the widget.
 - Edit Details:
 - $\circ~$ Edit the dashboard name and permissions.
 - Generate Report:
 - Generate a dashboard report or a scheduled report.
 - For more information about creating reports, see the <u>Reports section on page</u> <u>44</u>.
 - Duplicate Dashboard
 - Archive Dashboard
 - Delete Dashboard

Dashboard Reports

Generate reports to share from the dashboards. Schedule and share reports automatically (daily, weekly, monthly, or whenever needed) via email or print.

To create a report,

1. Click the ellipsis in the upper right corner of a widget and select **Generate Report**.

OR

2. Go to **Engage > Reports**.

For more details about how to create a report, see the Reports section on page 44.

8 | Reports

Reports

Getting Started



To access the Reports page,

- 1. Go to **Engage > Reports**.
 - This page only lists and creates reports for the Engage metrics.

On this page, create reports and see the report history and dashboard report schedules. Use the View filter to sort the reports by date.

NAME TYPE START END AT BY PDF STATUS	Report History $ \smallsetminus $	$ iii$ View All \vee				(Q Search F	Reports		+	
NAME TYPE START END PDE STATUS											
NAME TYPE START END PDE STATUS											
	NAME		TYPE	START	END			PDF	STATUS		

Create a Report

On the Reports page,

- 1. Click the plus icon in the upper right corner to launch the **Report** window.
- 2. Choose to create a **Dashboard Report**, or a **Scheduled Dashboard Report**.

Create a Dashboard Report

Dashboard Report	Scheduled Dashboard Report
Generate a PDF report from	your dashboard

This creates a PDF report for a specific dashboard.

Name this report:	
Name this Report	
Report Type	
Dynamic	~
data pertaining to the loc	t based on who is viewing the report. The viewer will only s tion(s) they are assigned to. Accounts do not adjust based on who is viewing the report.
data pertaining to the loc	tion(s) they are assigned to.

Report Settings
Time Range
Last 24 Hours
Timezone
Arizona 🗸

Publishing Settings	
Email Recipients:	
Add Users, Roles and/or Emails	

- 1. Name the report.
- 2. Select the **Report Type**.
 - **Standard**: The report is the same for all viewers.
 - **Dynamic**: Adjusts based on who is viewing the report. The viewer only sees the data pertaining to the locations they are assigned.
 - Dashboard widgets with Static Accounts do not adjust.
- 3. Select the dashboard to pull the report from.
- 4. Set the time range for the report to pull from.
- 5. Select a time zone.

- 6. Add the users, roles, and/or emails of the people who will receive the report.
- 7. Click Create Report.

Create a Scheduled Dashboard Report

Schedule a recurring report from your dashboard	Dashboard Report	Scheduled Dashboard Report
	Schedule a recurring repo	rt from your dashboard

This creates a recurring PDF for a specific dashboard.

Name this report:	
Name this Report	
Report Type	
Dynamic	~
data pertaining to the loca	based on who is viewing the report. The viewer will only se on(s) they are assigned to. ccounts do not adjust based on who is viewing the report.
Select Dashboard	
Select dashboard	

Schedule Settings						
Repeat This Report Daily Weekly 	/ () N	Nonthly (Quarterl	уС) Annually	
Repeat at HH:MM						
12	\sim	00		\sim	AM	\sim
Timezone Arizona		~				

○ 2 W	leeks 🤇	Month	🔾 Qua	rter 🔿 Yea	ar
MM					
~	00		\sim	AM	~
		\sim			
	:MM	:MM	:MM ~ 00	:MM ~ 00 ~	✓ 00 ✓ AM

- 1. Name the report.
- 2. Select the **Report Type**.
 - **Standard**: The report is the same for all viewers.
 - **Dynamic**: Adjusts based on who is viewing the report. The viewer only sees the data pertaining to the locations they are assigned.
 - Dashboard widgets with Static Accounts do not adjust.
- 3. Select the dashboard to pull the report from.
- 4. Schedule the recurring report.
 - a. Select the frequency of the report.
 - b. Set the hour the report will be sent.
 - c. Choose the time zone.

- 5. Set the report timeframe.
 - a. Select the date range for the information pulled for the report.
 - b. Set the time the range starts.
 - c. Choose the time zone.

Publishing Settings Email Recipients: Add Users, Roles and/or Emails...

- 6. Add the users, roles, and/or emails of the people who will receive the report.
- 7. Click Create Schedule.

View the Report History

On the **Reports** page, the **Report History** view displays a list of the current active reports.

4	Publish Report	s								В	- v 🖉 © 🕔 🔍
<			Report His	story \checkmark	🟥 View All 🗸					Q Search P	leports +
	Create New										
	Analytics									Sho	wing page 1 out of 1
	Dashboards			NAME		TYPE	START	END	CREATED AT	CREATED BY PDF	STATUS
\$ 2	Reviews					Dashboard Report	Dec 1, 2024	Dec 31, 2024	Jul 9, 2024	_	
	Listings	>		×			12:00 AM America/New_York	11:59 PM America/New_York	8:35 AM	1	EDITABLE 🛞
	Publish	2									
	Requests	ĺ.									
۵		>									

- **Name**: The name of the report.
- **Type**: The type of report.
- Start: The time the data of the report begins.
- **End**: The time the data of the report ends.
- Created At: The day the report was created.
- Created By: The person who created the report.
- **PDF**: A link to the PDF.
- **Status**: The report schedule is active or paused.

View the Dashboard Report Schedules

On the **Reports** page, the **Dashboard Report Schedules** displays a list of all the scheduled reports.

Dashboard F	Report Schedules \vee						Q :	earch Schedules	+
								Showing pa	ge 1 out of 1
	NAME	TYPE	FREQUENCY	TIME	DURATION	AUTOPUBLISH	CREATED BY	STATUS	
	0	Dashboard Report	QUARTER	12:00 AM America/Los_Angeles	QUARTER	ON		PAUSED	۵

- **Name**: The name of the report.
- **Type**: The type of report.
- **Frequency**: The frequency the report is sent.
- Time: The time of day the report is sent.
- **Duration**: How long the recurrence for the report is.
- Autopublish: If the report is scheduled to be sent out automatically.
- Created by: Who the report was created by.
- Status: The report schedule is active or paused.

Edit Reports

Easily add or remove recipients, change the cadence of a report schedule, and update the date range to report on.

From the **Reports** page,

- 1. Click the gear icon:
 - a. Click View Report to confirm the report is capturing the correct data.
 - b. Click Rerun Report to reflect the updated settings.
 - c. Click Publish Report so others can see it.
 - d. Click Edit Report to change any/all settings, add or remove recipients, and more.
 - e. Click Delete Report if/when it is no longer needed.

From the Dashboard Report Schedules page,

Schedule Summary
Name: BDP Social Media Performance Overview 2_Quarterly Update
Selected Dashboard: BDP Social Media Performance Overview
Schedule Settings
Delivery Frequecy: Quarterly
Delivery Time: 12:00 AM
Delivery Timezone: America/Los_Angeles
Report Settings
Report Range: Quarter
Report Start Time: 12:00 AM
Report Timezone: America/Los_Angeles
Feed Report(s)
Monitors Selected: None
Resume Schedule
PAUSED
This scheduled report is paused.
Edit Schedule Delete Schedule

- 1. Click the gear icon:
 - a. Scroll to the bottom of the page to **Pause** or **Resume** the schedule.
 - b. Click **Edit Schedule** to edit the name of the report, the schedule, report, and publishing settings.
 - c. Click **Delete Schedule** to delete the report from the schedule.

9 | Resolutions by User

Resolutions by User

The **Resolutions by User** page provides a chart to track the engagements in the inbox.

Getting Started



To open the Resolutions by User page,

1. Go to Engage > Resolutions by User.

Resolutions by User Chart

Column	Description
Agent	The person the engagement is assigned to.
Resolved	The number of resolved engagements.
Avg. First Response Time	The average time from the moment an engagement comes in to when the first response is sent. This excludes engagements that are not responded to.
Avg. Interaction Time	The average time from the first response to when the engagement is resolved. This number only includes private messages that are responded to.
Avg. Resolution Time	The average time from when the engagement comes in to when it is resolved.
Responses	The number of responses for the engagements.
Dismissals	The number of messages dismissed. This option is used mostly for spam.
Hidden	The number of comments hidden. This is only available with Facebook comments.
Unresolved	The number of unresolved engagements.

Sort the Chart

1. Click the title of each column to sort the chart by that data (e.g., sort the chart by Responses or Average Resolution Time.)

Γ	🛱 Year To D	ate 🗡								
	AGENT	RESOLVED	AVG FIRST RESPONSE TIME ()	and interaction time 0	AVG RESOLUTION TIME	RESPONSES	DISMISSALS	HIDDEN	UNRESOLVED	_

2. Use the date filter in the top left corner to sort the resolutions by time.

Start Date	Time	- 小 - Live					
Mar 11, 2	12:00 AM	Last Hour	Today	March 2025	Last Year Q1	March 2025	Q1
End Date	Time	Last 3 Hours	Yesterday	February 2025	Last Year Q2	April 2025	Q2
Mar 11, 2	04:17 PM	Last 6 Hours	Last 7 Days	Last 3 Months	Last Year Q3	Next 3 Months	Q3
		Last 12 Hours	Last 14 Days	Last 6 Months	Last Year Q4	Next 6 Months	Q4
Apply Date R	ange Cancel	Last 24 Hours	Last 30 Days	Last 12 Months			
			Last 90 Days	Year To Date			

3. Click the ellipsis in the top right corner to download a CSV of the chart.

런 Today	~							Download CSV
AGENT	RESOLVED	AVG FIRST RESPONSE TIME	AVG INTERACTION TIME	AVG RESOLUTION TIME	RESPONSES	DISMISSALS	HIDDEN	UNRESOLVED

10 | Premium Paid Services

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 help achieve 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 (Google Profile Optimization, formerly known as 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.

11 | Additional Resources

Additional Resources

Check out more user guides to learn more about the Reputation platform.

- <u>Actions</u>
- <u>Admin</u>
- <u>Customer Journey Insights</u>
- Dashboards
- Experience
- <u>Inbox</u>
- Mobile App
- <u>Rep Connect</u>
- <u>Reports</u>
- Reputation Score
- <u>Requesting</u>
- Reviews
- Social Listening
- Social Publish
- <u>Surveys</u>