THE INTERFACE

USEFUL LINKS

Platform Login: https://reputationcrm.com/
Support Center: https://support.reputationcrm.com/
How to get Support?   https://support.reputationcrm.com/1-get-support/79-how-to-get-support

THE INTERFACE

Although Reputation CRM (the back-end) is fully responsive and can be used on a mobile phone or a tablet, it is best used when viewed on a large display of at least 1920 x 1080 pixels (Full HD).

LIVE CHAT SUPPORT

From any page, you can get LIVE support by clicking the icon located at the bottom right

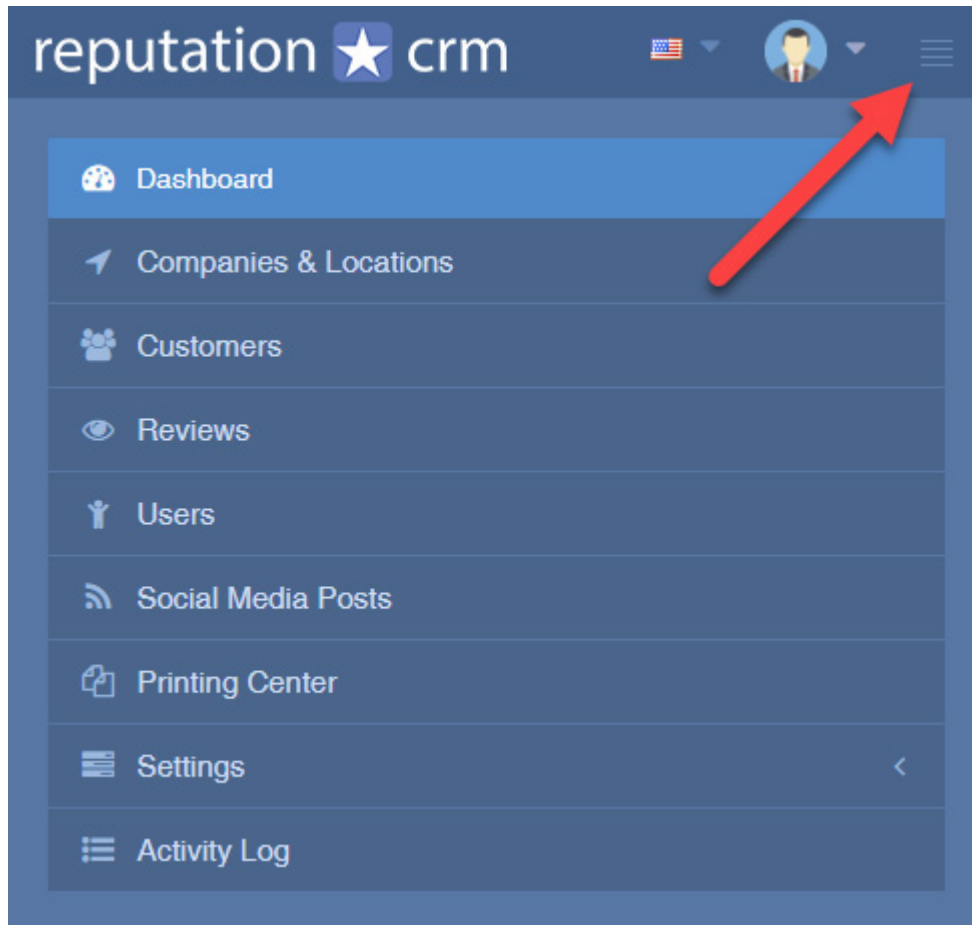Check this page for more info on How to Get Support:
https://support.reputationcrm.com/1-get-support/79-how-to-get-support

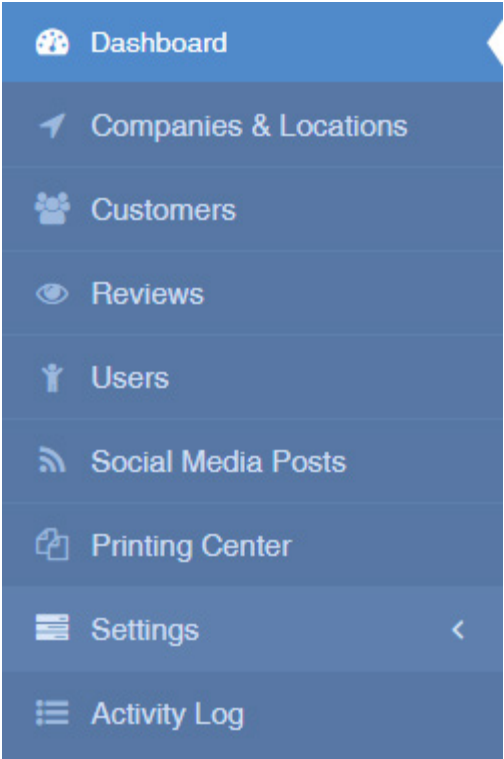## THE TOP HEADER AND THE MENU OPTIONS

Desktop View:

Mobile and Smaller Tablet View: the Top Header has the Menu Options available here
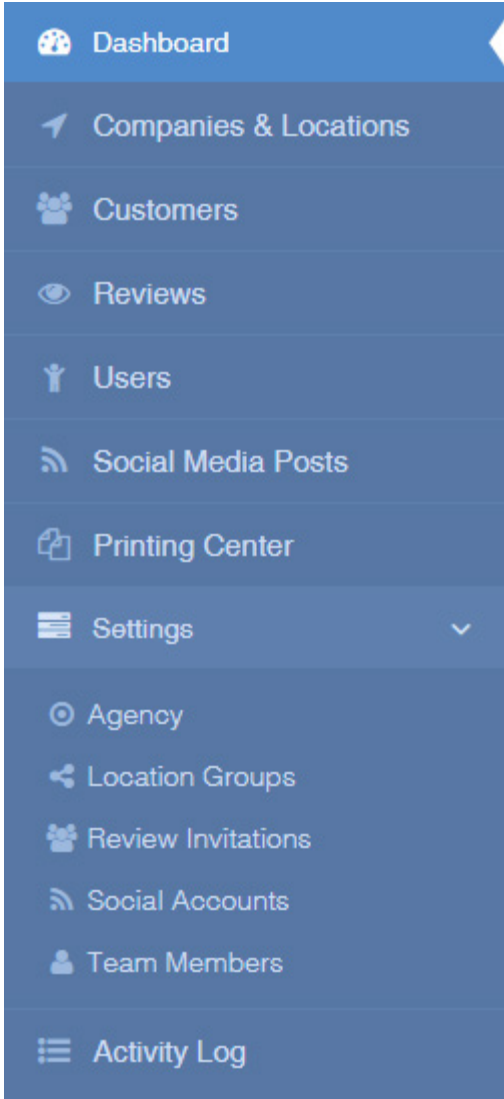
THE MAIN MENU

The Main Menu makes it easy to navigate throughout the platform. Just click on an item to view a section of the site.

The Standard Main Menu

- Dashboard
- Companies & Locations
- Customers
- Reviews
- Users
- Social Media Posts
- Printing Center
- Settings ‹
- Activity Log

Extended Menu when clicking on Settings

- Dashboard
- Companies & Locations
- Customers
- Reviews
- Users
- Social Media Posts
- Printing Center
- Settings ⌄
  - Agency
  - Location Groups
  - Review Invitations
  - Social Accounts
  - Team Members
- Activity Log

Short Menu with icons only

NOTE: Only displayed when you are inside a section of the website

When a Menu item is selected, its color changes to light blue.
Example: Companies / Locations

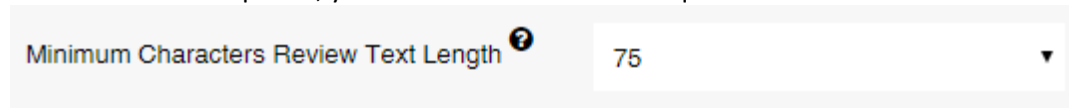When hovering an item in the short menu mode, we display the full option name:

OPTIONS OF THE MAIN MENU

1. **Dashboard**: provides analytics on your Online Reputation and Performance on improving your Business Reputation
2. **Companies & Locations**: sets the way the platform will work for your Brand / Business and all Business or Office Location (if any)
3. **Customers**: manages Customers and Review Invitations (Customer list, Review Invitation Queue and Invitation Sent Log)
4. **Reviews**: allows Actions on individual reviews (like responding to reviews)
5. **Users**: are engaged users: customers that left a platform review or users that interacted on reviews in the front-end review page
6. **Printing Center**: prints beautiful documents to increase review collection
7. **Settings**:
    a. **Agency**: customizes the platform for web, marketing and communication agencies (only visible to Sales Partners)
    b. **Location Groups**: manages multi locations into different groups to allow easy selection throughout the platform
    c. **Review Invitations**: sets some default behaviors for the Review Invitations (only available to the Main Account Holder)
    d. **Social Accounts**: links your Business on the platform to your Social Media Pages or Accounts (can be hidden by Sales Partners)
    e. **Team members:** allows web, marketing and communication agencies to grant access to clients to the platform (with privilege control)
8. Activity Log: tracks all automated actions (like aggregating reviews or sending out review invitations) and manual actions performed on the platform by you or the users

NOTE: If you own a Team Member account (set by your web, marketing or communication agency), some of the items might not be visible or you might be restricted in the usage of some of the platform features).
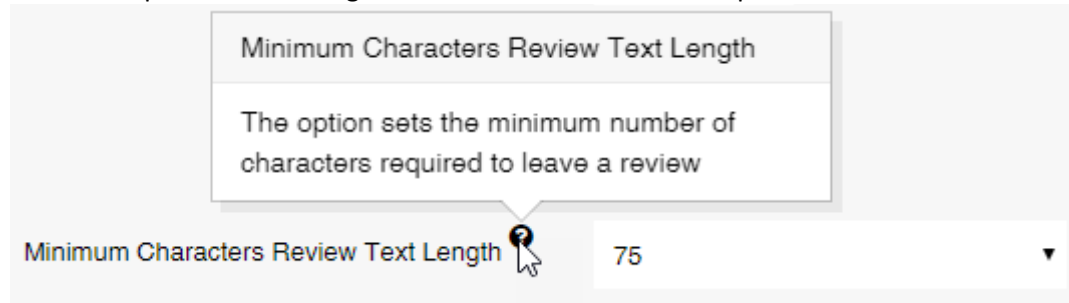
HELP ON ALL FIELDS

After all field descriptions, you will see a balloon with a question mark inside:

Hover the question mark to get additional info on what the option does:
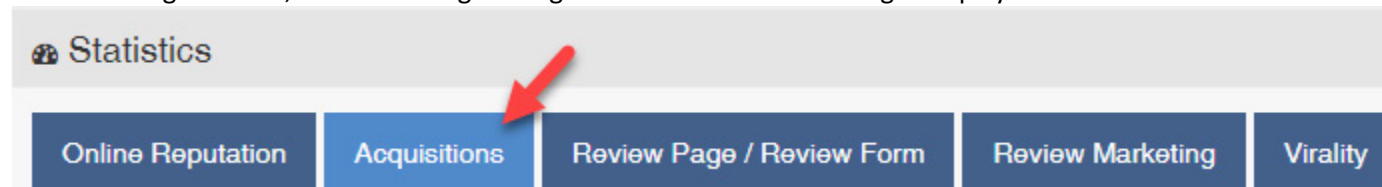

THE TABS

Throughout the platform, in the main section of the screen, you will be able to view (or insert) different data based on the Active Tab.

Dashboard Example:
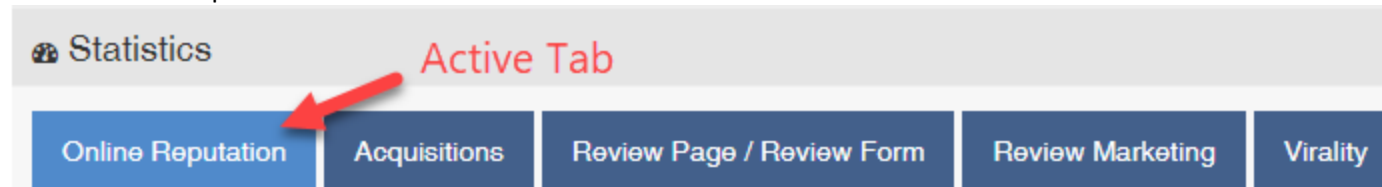
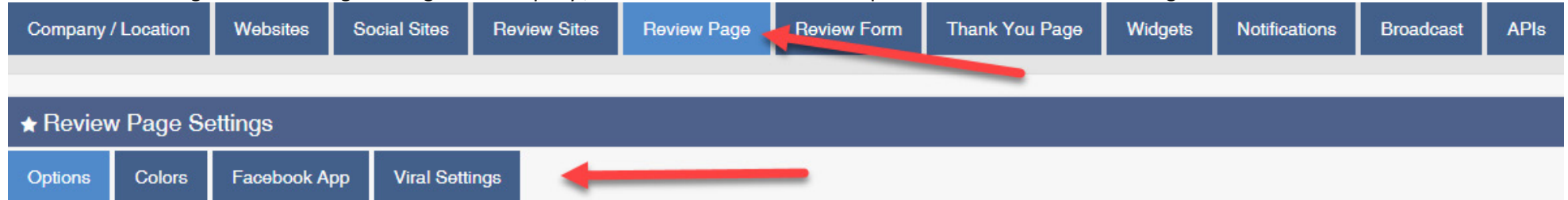When clicking on a Tab, its color changes to light blue and different stats get displayed:

NESTED TABS

Sometime, you will find multiple tab levels (or nested tabs).

The Company / Location Example:
Here we are viewing the Review Page Settings of a Company / Location and we are in the Options section of the Review Page:

If we click on the Nested Facebook App Tab, you will see options to set up the Facebook App:
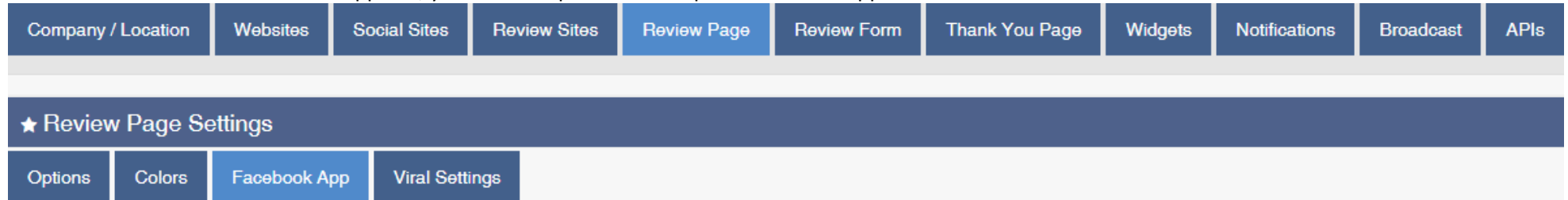
BUTTONS

Buttons come in a variety of colors depending on what they perform.
ALL BUTTONS DISPLAY AN ICON POSITIONED BEFORE THE TEXT DESCRIBING THE ACTION PERFORMED
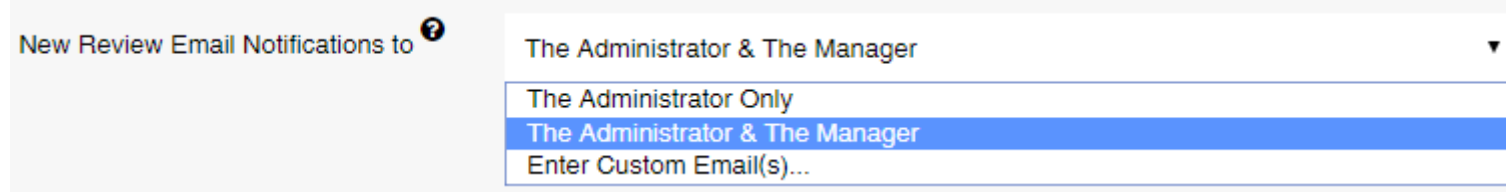
Some Examples:
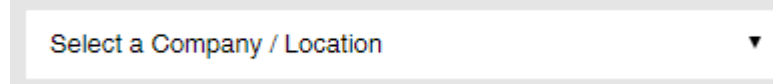
DROPDOWNS

Simple Dropdowns: this type of dropdowns only has a few options
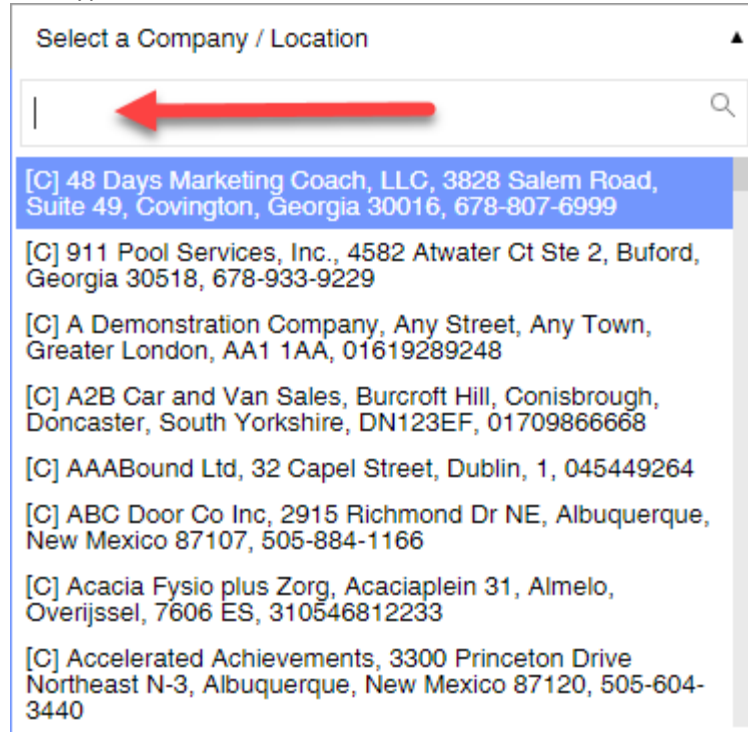
New Review Email Notifications to ❓

The Administrator & The Manager ▼
The Administrator Only
The Administrator & The Manager
Enter Custom Email(s)...

Dropdowns with a search box: whenever many results need to be displayed, you can filter results. Click on the field:
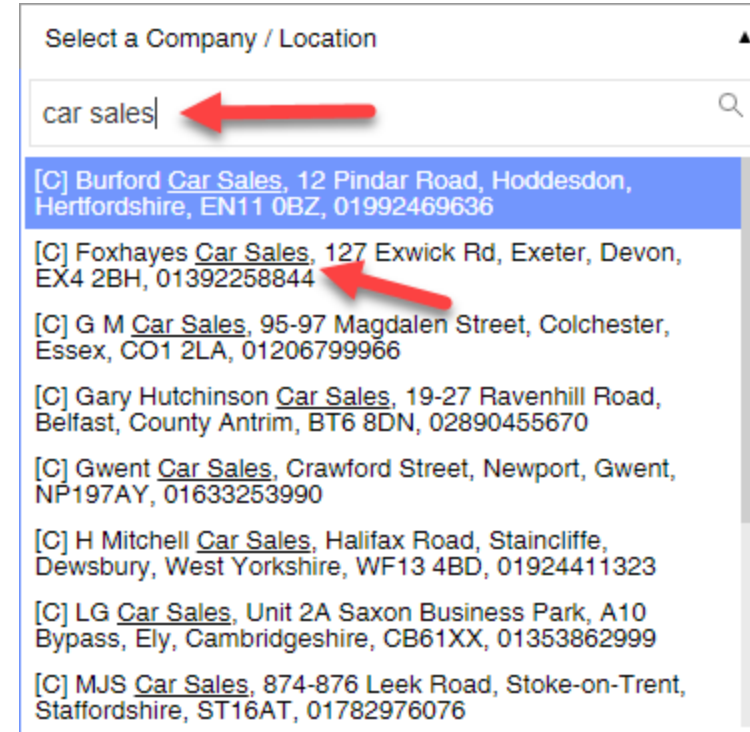
Select a Company / Location ▼

And type in a few letters in the search box in order to refine the search:

Select a Company / Location ▲

🔍

[C] 48 Days Marketing Coach, LLC, 3828 Salem Road, Suite 49, Covington, Georgia 30016, 678-807-6999

[C] 911 Pool Services, Inc., 4582 Atwater Ct Ste 2, Buford, Georgia 30518, 678-933-9229

[C] A Demonstration Company, Any Street, Any Town, Greater London, AA1 1AA, 01619289248

[C] A2B Car and Van Sales, Burcroft Hill, Conisbrough, Doncaster, South Yorkshire, DN123EF, 01709866668

[C] AAABound Ltd, 32 Capel Street, Dublin, 1, 045449264

[C] ABC Door Co Inc, 2915 Richmond Dr NE, Albuquerque, New Mexico 87107, 505-884-1166

[C] Acacia Fysio plus Zorg, Acaciaplein 31, Almelo, Overijssel, 7606 ES, 310546812233

[C] Accelerated Achievements, 3300 Princeton Drive Northeast N-3, Albuquerque, New Mexico 87120, 505-604-3440

Select a Company / Location ▲

car sales 🔍

[C] Burford Car Sales, 12 Pindar Road, Hoddesdon, Hertfordshire, EN11 0BZ, 01992469636

[C] Foxhayes Car Sales, 127 Exwick Rd, Exeter, Devon, EX4 2BH, 01392258844

[C] G M Car Sales, 95-97 Magdalen Street, Colchester, Essex, CO1 2LA, 01206799966

[C] Gary Hutchinson Car Sales, 19-27 Ravenhill Road, Belfast, County Antrim, BT6 8DN, 02890455670

[C] Gwent Car Sales, Crawford Street, Newport, Gwent, NP197AY, 01633253990

[C] H Mitchell Car Sales, Halifax Road, Staincliffe, Dewsbury, West Yorkshire, WF13 4BD, 01924411323

[C] LG Car Sales, Unit 2A Saxon Business Park, A10 Bypass, Ely, Cambridgeshire, CB61XX, 01353862999

[C] MJS Car Sales, 874-876 Leek Road, Stoke-on-Trent, Staffordshire, ST16AT, 01782976076

ON / OFF – YES / NO SELECTORS
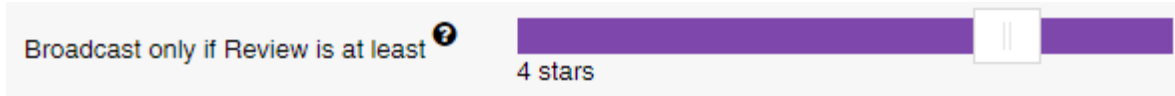
You can toggle the state by clicking on the button:

Credit Cards Accepted ❓   Yes
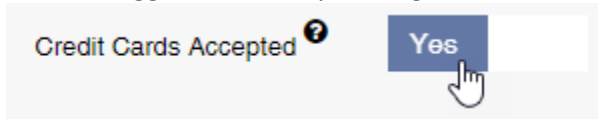
After clicking, the state of the button changes:

Credit Cards Accepted ❓   No
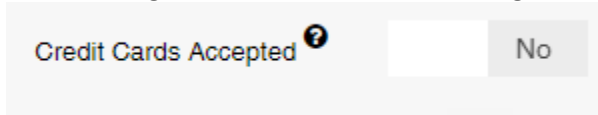
# SLIDERS

Click and drag the slider to change to the desired value, then release the slider when the desired value gets reached:

Broadcast only if Review is at least ❓

4 stars

COLOR PICKERS

Click the Color Picker. Select your color either directly in the color picker (you can adjust the color spectrum by sliding the vertical rainbow chooser), enter RGB values or a HTML color code:

Buttons Background Color ❓

R   32
G   55
B   105
203769

OK
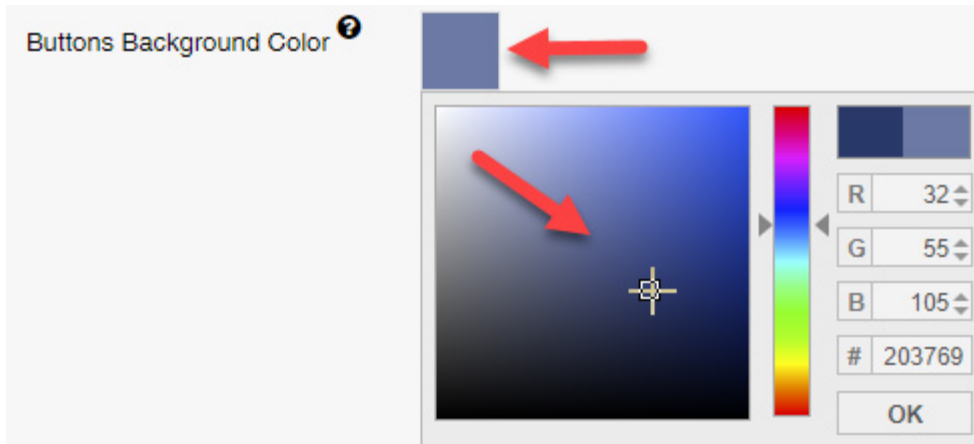
DATE RANGE SELECTORS

📅 Select a Date

In the dropdown, you can easily select a Date Range by clicking on of the preselected items, or you can have a Custom Range by selecting the option

After selecting a date, the date range gets displayed in the field:

📅 February 1, 2019 -
April 30, 2019

IMAGE RESIZER AND UPLOADER

To know the image file requirements, Help is always available by hovering the question mark:

Logo

Brand / Company / Location Logo is displayed on many parts of the platform including the Review Form & Review Page as well as in the Printing Center for the generation of high quality documents. **Uploaded image must be in jpeg format, with a minimum size of 690 x 690 pixels or greater**.

Click or Tap on the image to select a file or drag and drop an image over the current image. You can reposition the image, zoom in or out. To save the image, click the checkmark at the top right of the image

Type

on ID

Union VAT ID

f Employees

Logo

Drop a photo on the image or click the image to select a file.
Image must be square and for best results should have a minimum width AND height of 690 x 690 pixels

From your desktop, drop the image file or click the image to select a file:

Use the first 3 buttons to resize the image:

To confirm that resizing is OK, click the Checkmark icon:

After uploading an image, do not forget to use the Save button (found at the top or bottom of the form):
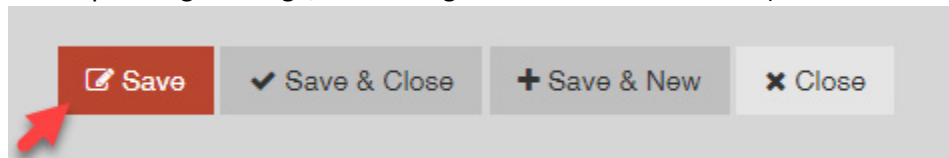
THE DATATABLES

Datatables can be found in most sections of the Platform. They play an important role since they display data and allow interactions. Mastering datatables is key when using the platform. So please take a bit of time to read this important section of the Interface Manual.

Because all Datatables are displayed in the same way, we will not go through a detailed description of all the different datatables available in Reputation CRM. By presenting the Companies & Locations Datatable and the Customers Datatable, you should be able to get around!

In the screenshot below a Companies & Locations Datatable with 1 Company and 2 Locations:

All Datatables have 4 different inner sections:

In light RED: the Navigation, Tools and an Action Section.
In light PURPLE: the Filtering options with a Search and a Reset Button.
In light GREEN: the data returned due to filtering options
In light RED again: the Navigation gets displayed a second time in case you might want to navigate between results quickly after reaching the end of a page.

THE ADD NEW BUTTON(S) AND THE TOOLS DROPDOWN

At the top right, you will:
- usually find one or more RED button to insert data into the platform (New Company or Location, New Customer…)
- and a Tools button, that when clicked, displays a dropdown to Export or Print data

Companies & Locations Datatable example:
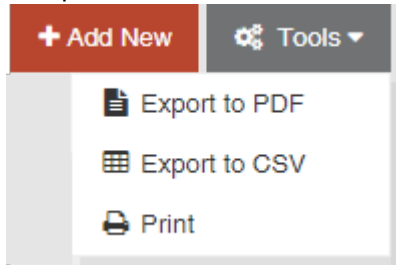
NOTE: Export to PDF or CSV options only export the selected records: the one that are currently selected and displayed on screen.
You might have to use the Display settings (see below) to export desired records.

Customers datatable example:

THE ACTIONS

Actions are launched to perform defined tasks for one or for multiple records at once (depending on the action).

1. First, in the data section, select one or more records by ticking the checkboxes,
2. In the dropdown, select the Action you wish to perform,
3. Click the Submit button to launch the Action.

Example: Deleting a Location in the Companies & Locations Datatable

THE NAVIGATION IN THE DATATABLE

The navigation blocks at the top and bottom of the page offer a quick way to navigate between pages or display more records onto a single page.

CAUTION: If you have thousands of records to display (like in the example below taken from the Customers datatable), do not select the All Option as this will crash your browser!

- **Refine your search before viewing All records**: depending on your computer and browser assigned memory, try to always stay below 500 records on screen
- **Before using the Reset button to select all records again, change the Display option back to 50 or less records, or your browser most likely will CRASH!**

DO NOT DO THIS!
Close to half a million customers to display on a single screen! CRASH ASSURED ☺

HOW TO FILTER DATA IN THE DATATABLE

Filtering data is easy:

1. Use the input fields and the dropdowns available
2. Click the Search button

Example Search in the Customers datatable: display all customers that have unsubscribed from Emails for the company Active Wills Limited

After the search is performed, you get the number of records found:

And each customer data:

You can use the Reset button located under the Search button to select all records again:
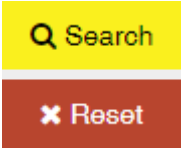
DATATABLE ACTIONS AVAILABLE ON A RECORD

By clicking available buttons in the datatable, some Actions can be launched on individual records without the need to select an Action in the dropdown.

Example in the Reviews datatable:

TEXT LINKS IN DATATABLES

All texts in Reputation CRM are written in BLACK.
Whenever you see BLUE texts, this means that this is a link to view AND / OR edit data.

Example Text links in the Users datatable:

When clicking the User Name in the datatable, you get to view a lot more info on the user:

reputation ★ crm

Info | Stats | Reviews | Comments | Activities

Chad Freeman
★★★★★

ACTIVITIES: 👍 0 | f 0
★ 0 | 👎 0 | 🐦 0
💬 0 | 🏆 0 | g+ 0
📷 0 | 😊 0 | in 0
🎥 0 | 👕 0 | 📌 0
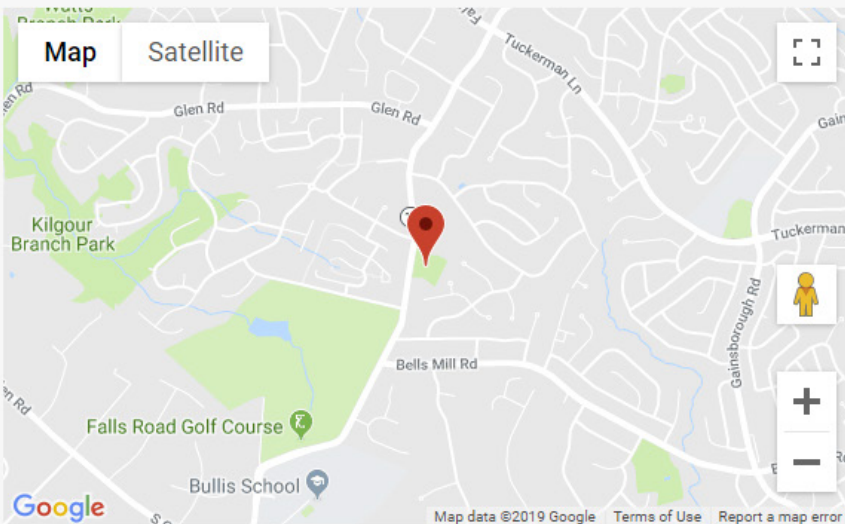
LANGUAGE:
English

CONTACT INFO:
Email Address:

Mobile Phone #:

SOCIAL LOGIN VIA:
f

✉ Email Me

LOGIN INFO:
IP Address:

Host:

Registered Date: 2019-05-12 04:39 AM

Last Visit Date: 2019-05-12 04:39 AM

Activated: Yes

One last example: texts links are everywhere in the Company / Location datatables

Company / Location	Websites	Social Sites	Review Sites	Review Page	Review Form	Thank You Page	Widgets	Notifications	Broadcast	APIs

📖 Company / Location Info

Info	Address	Email Addresses	Phones	Google Maps	Employees	Categories	Languages	Photos	Videos	Opening Hours	Publishing

+ Add New
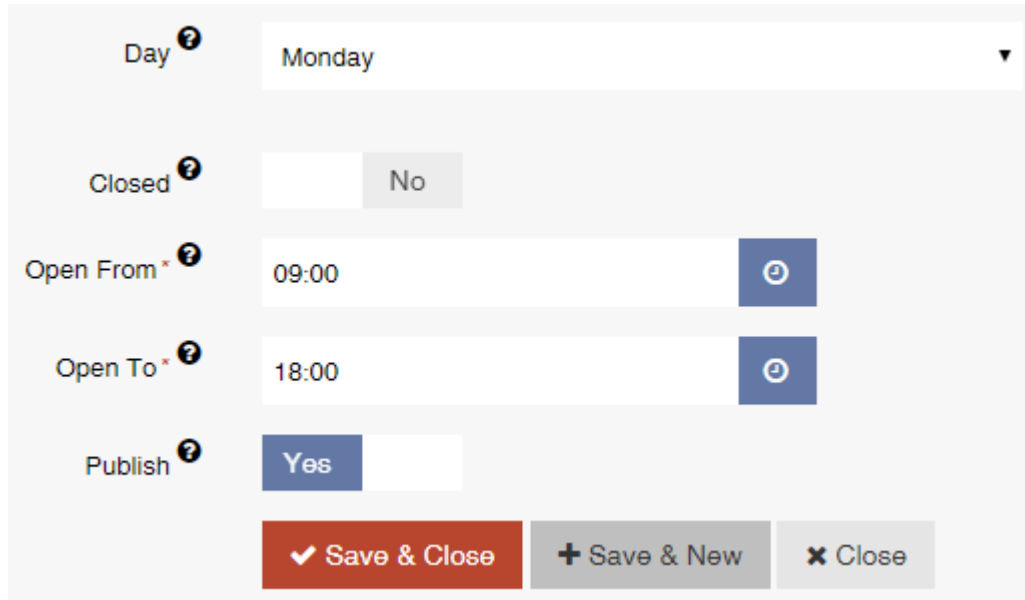
Page ‹ 1 › of 1 | Display 25 ▾ records | 7 record(s) found   Actions ▾   ✔ Submit

☐	Days	Open / Closed	Open From	Open To	Status	Order
☐	Monday	✅	09:00	18:00	✅	⬆⬇ 1
☐	Tuesday	✅	09:00	18:00	✅	⬆⬇ 2
☐	Wednesday	✅	09:00	18:00	✅	⬆⬇ 3
☐	Thursday	✅	09:00	18:00	✅	⬆⬇ 4
☐	Friday	✅	09:00	18:00	✅	⬆⬇ 5
☐	Saturday	✅	09:00	17:00	✅	⬆⬇ 6
☐	Sunday	✅	10:00	17:00	✅	⬆⬇ 7

Page ‹ 1 › of 1 | Display 25 ▾ records | 7 record(s) found

And text links allow access to data forms:

FINAL NOTES REGARDING THE INTERFACE

You can play around and try the buttons or Actions SAFELY! Reputation CRM does not BITE ☺
We made sure that most of the Actions performed can be undone (apart from some very recent DELETE Actions where we might not be able to get back all of your data!).

If you need help, do not forget that we are just a few clicks away!
From any page, you can get LIVE support by clicking the icon located at the bottom right of the screen: