Managing Request Templates

https://help.reputation.com/knowledgebase/managing-request-templates/ | Last Updated:March 9, 2021

> 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**, **Status**.

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.

When saving a copy of a system template designed for Reputation Live (mobile request), you must name your copy the same name of the original template in order to override the system template: **Reputation Live Default Message**.

You can create more than one custom template per location using the same name.

System templates for “Star” and “Smiley” provide an out-of-the-box simple survey flow.

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

Only templates that correspond to the request method (Email or SMS) are available to choose.

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Bulk Requests

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).

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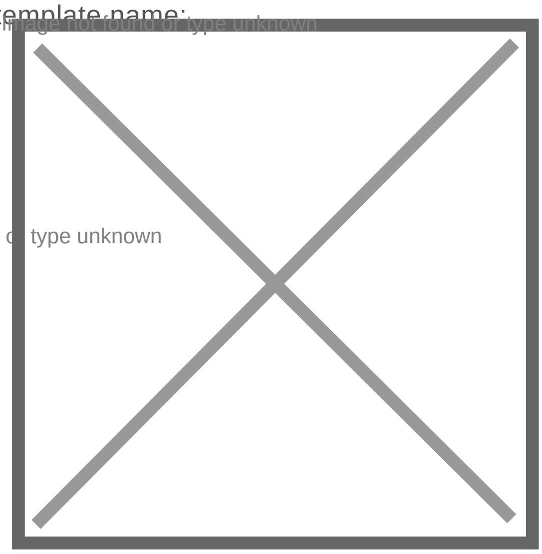
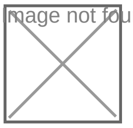
Template Status

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:





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To create a new template:

1. Locate an existing template type from which to copy.
2. Next to the template options, click **Save as New**.
3. 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.
   Click **See Variables** to see a list of variables to use.

   **Applies to email and kiosk template types only*

   - **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 request 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. We recommend choosing no more than two options.

4. 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.)
5. Click **Save**.

Follow-Up Logic

Asking two more times, several days apart, after the initial request improves the success rates by 30 to 60 percent. 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. Next to the template options, click **Save as New**.
3. Click **Add Follow-up**.
4. Set the first condition:
   If is not clicked after , then send .
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5. 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:

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

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