

Review Builder User Guide

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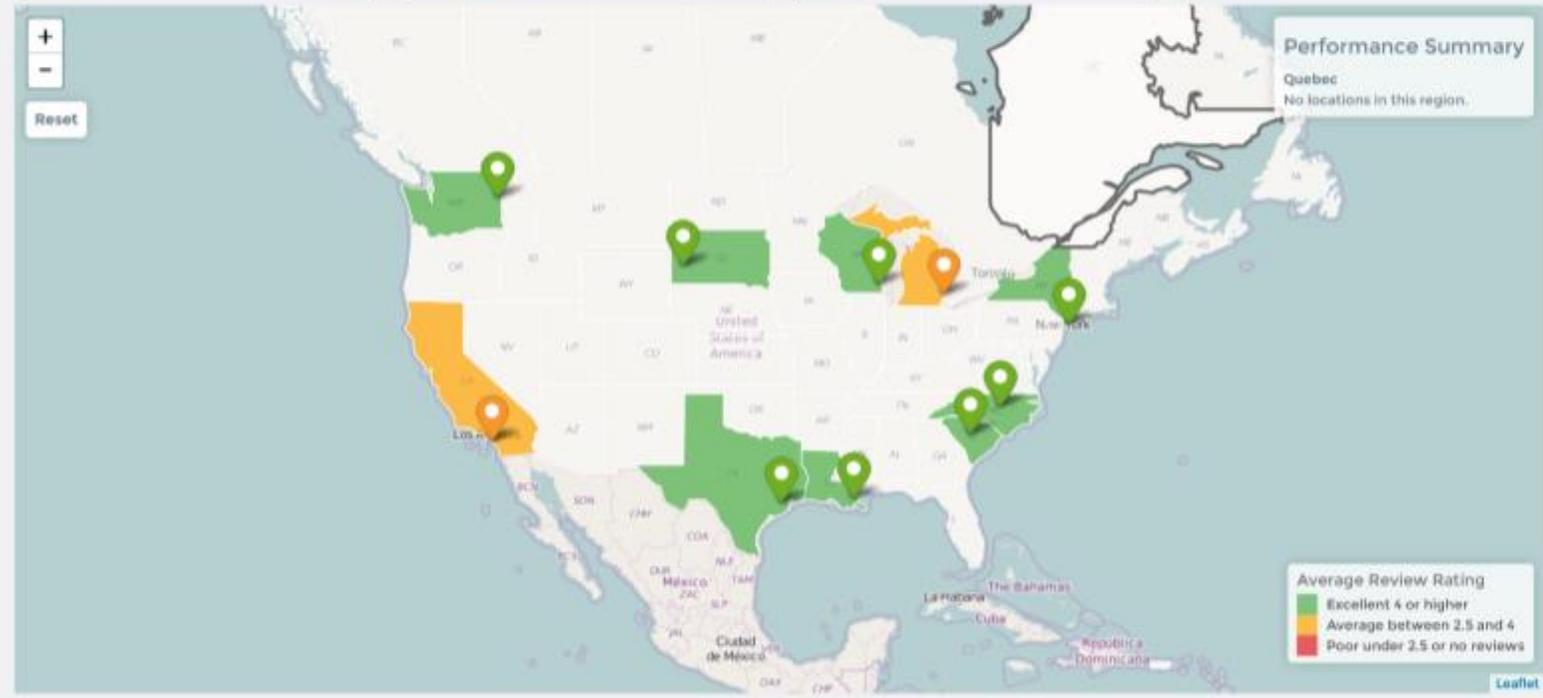
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Overview

Review Builder is a platform for collecting customer feedback and generating positive reviews for your locations. Feedback requests are sent to your customers via email or text using customizable campaigns that you can setup and manage directly within the platform. You can also embed a widget on your website/store pages and have reviews show up there as well. Check your service agreement for guidelines on pricing which will vary based on usage.

Review Builder can be accessed through this tab on the Dashboard

REVIEWS Last 30 days 252 ▲ 33% Total 4,497	SOCIAL MENTIONS Last 30 days 598 Total 598	LISTINGS Added in last 30 days 113 Locations listed with Google Maps 100%	Stores on page 1 on Google Maps 10 Stores before page 5 on Google Maps 100%
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Location: All (10)



Summary Reports
Select a single location to see summary reports.

- NEGATIVE REVIEWS**
- Blaze Pizza, Columbia, SC**
 FACEBOOK
 The food was delicious but was ruined by the attitude of the girl with orange colored dreads who...
 Jessica Germain | Aug 1, 2016
 - Blaze Pizza, Royal Oak, MI**
 YELP
 Also On: LinkedIn, YouTube
 Good concept. Terribly rude customer service. Snotty people who honestly can't handle fulfilling any...
 Stas E. | Aug 1, 2016
 - Blaze Pizza, Columbia, SC**
 YELP
 Also On: LinkedIn, YouTube
 I agree with the other comment -- "CIC's pizza -- just more expensive staff was 4 stars -- but pizza...
 John E. | Jul 31, 2016
- [Manage My Reviews](#)

- POSITIVE REVIEWS**
- Blaze Pizza, Morrisville, NC**
 REVIEWBUILDER
 This pizza is radical dude!!!
 Leonardo Turtle | Aug 17, 2016
 - Blaze Pizza, Rapid City, SD**

Campaign Wizard-Delivery

When you first login, you'll come to our Wizard, which will walk you through setting up your first campaign. Start by naming your first campaign.

1 Campaign Name ✓ 2 Delivery Methods ✓ 3 Review Form ✓ 4 Contacts ✓ 5 Activate ✓



Let's get started!

Begin by adding a campaign name.

New Customer

Review Builder Wizard

1 Campaign Name ✓ 2 Delivery Methods ✓ 3 Review Form ✓ 4 Contacts ✓ 5 Activate ✓



Prev

Add delivery method(s)

Configure how you'll collect reviews. You can choose to send out links to your review form. You can also opt to not use a delivery method if you plan on embedding the review form.

Delivery Method 1

Delivery Via*

Email

Email Subject*

Please tell us your thoughts!

Email Template

Q Select Template

Sample Template

Send: *

Immediately

Campaigns can be sent out via email or SMS, choose your method of delivery here

Schedule when your campaign will send out. Pick a date/time or choose "immediately."

NOTE: Immediately will send out emails as soon as you click save at the end of the wizard for any contacts you add during the wizard campaign process.

Click this button to change your email template (Pop out box on next page)

Click here to enable drip campaigns. Add'l emails can be sent to each contact until they respond.

Add Additional Delivery Method

Campaign Wizard-Review Form

Review Builder Wizard

1 Campaign Name ✓ 2 Delivery Methods ✓ 3 Review Form → 4 Contacts → 5 Activate

Add review form

Please select a review form. This will be used to collect reviews.

Prev Select a form

Use Existing Form | Create New Form

Simple Form

Leave a Review

How was our service?
★ ★ ★ ★ ★

Is there any feedback you would like to give us?
Please write your feedback here.

Submit

Select

Net Promoter Form

Feedback Survey

How would you rate your experience with us?
★ ★ ★ ★ ★

How likely is it that you would recommend us to a friend or colleague?
○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
1 2 3 4 5 6 7 8 9 10

Please provide any additional feedback you might have for us.
Please write your feedback here.

Select

REVIEW FORMS: Customize the landing page that customers will reach after opening and clicking on your email in order to leave feedback.

Campaign Wizard-Email

Review Builder Wizard

1 Campaign Name ✓ 2 Delivery Methods ✓ 3 Review Form ✓ 4 Contacts 5 Activate

Prev

Add contact(s) Total Contacts Added: 0

This step is optional. Once the campaign has activated, your contacts will be messaged according to the delivery methods you created. Contacts can be added one at a time, or in bulk by uploading an Excel spreadsheet.

 Create Single Contact

 Bulk Upload Contacts

COMPANY LOGO HERE

Your opinion matters!

Click below to submit your review

[Submit Review](#)

Help us improve
Your suggestions are important to us

Thanks for visiting!
We hope you enjoyed your experience with us.

© 2016, All Rights Reserved
1234 Your Address Here
[Unsubscribe](#)

Help us improve

Left Content

Your suggestions are important to us

Right Heading

Thanks for visiting!

Right Content

We hope you enjoyed your experience with us.

Company Name

Street Address

1234 Your Address Here

[Save](#)

Create/Edit your review templates here. The more personalized you can be, the better!

Campaign Wizard-Contacts

Add contacts to your campaigns from this tab. You can tie customers to specific locations, all you need is their name and email (phone # optional)

The screenshot shows the 'Add Contact' form with the following fields:

- Contact Name*
- Email*
- Phone
- Location

The Location dropdown menu is open, displaying the following options:

- Blaze Pizza, 1024 Market Center Drive, Morrisville, NC
- Blaze Pizza, 112 S Main St, Royal Oak, MI
- Blaze Pizza, 1325 Eglin St, Rapid City, SD
- Blaze Pizza, 16100 Kensington Drive, Sugar Land, TX
- Blaze Pizza, 17530 W Bluemound

An orange arrow points from the text box above to the Location dropdown menu.

- 1 Campaign Name ✓ 2 Delivery Methods ✓ 3 Review Form ✓ 4 Contacts ✓ 5 Activate

New Customer has been successfully saved!



Prev

Wizard Complete

In order to save your new campaign, press the 'Save' button below. In order to activate it, press the 'Activate' button below. It must be activated in order to send any emails/SMS.



Save



Activate (optional)



Go to Dashboard

That's it! Save your campaign.

Activate: This will turn on your campaign. The contacts you added will be sent email/text upon the next time period you selected earlier.

NOTE: Immediately will send out emails as soon as you click save at the end of the wizard for any contacts you add during the wizard campaign process.

Campaign Performance

Once your campaign is running and you start to collect feedback, you can measure the performance of your campaigns on the stats page.

The dashboard displays campaign performance for a 'New Customer'. On the left, a bar chart titled 'Campaign Performance' shows four metrics: Total Reviews (blue bar, value 1), Click Throughs (black bar, value 1), Emails Opened (green bar, value 1), and Emails Sent (orange bar, value 1). A tooltip for 'Total Reviews' shows 'Total Reviews: 1'. On the right, a 'Campaign Summary' table provides key statistics.

Campaign Summary	
Status	Active
Date Activated	8/18/16
Total Current Contacts	1
Total Contacts (Includes Deleted and Current)	1
Total Reviews	1
Average Rating	5.00

Below the summary table are four expandable sections: Email Details, SMS Details, Form Details, and User Engagement.

Open each drop-down menu for in-depth looks at how your campaign is producing!

- ▶ Email Details
- ▶ SMS Details
- ▶ Form Details
- ▶ User Engagement

Campaigns 1

- Templates 2
 - Review Forms 1
 - Email Templates 1
 - Review Widgets 0
- Account Settings

Manage Campaigns

+ Add New Campaign

Name	Contacts	Reviews	Created By	Actions
New Customer	1	1	Mario Clark	

First Previous 1 Next Last

Manage your campaigns, review forms, email templates and widgets from these

Sample Campaign

The "Campaign Wizard" is always available here.
Or select New Campaign to create the outline of the campaign without the wizard.

Edit, Activate, Embed & Delete campaigns with these icons

- ← Campaigns 1
- ▼ Templates 2
 - Review Forms 1**
 - Email Templates 1
 - Review Widgets 0
- ⚙ Account Settings

Manage Review Forms

[+ Add New Review Form](#)

Form Name	Date Created	Created By	
Sample Form	8/18/16 9:29 AM	Mario Clark	✎ 🗑 🔗

First Previous **1** Next Last

REVIEW FORMS: Customize what consumers will see after they click on your email request. This is a customizable web page they will leave feedback.

[Review Forms](#) / [Edit](#)

Edit Review Form

[Preview Form](#) [Edit Form](#) [Preview Thank-YouPage](#) [Edit Thank-YouPage](#)

Title*

Color Theme

Heading

Rating Question

Detail Question

Submit Text

Leave a Review

How would you rate your experience?
★ ★ ★ ★ ★

Is there any feedback you would like to give us?
Please write your feedback here.

Welcome, Mario
My Account | Logout

Snapshot | Reviews | Chatter | Listings | Rankings | Media | Workflow | **Review Builder**

← Campaigns 1

↳ Templates 2

- Review Forms 1**
- Email Templates 1
- Review Widgets 0

⚙ Account Settings

Manage Review Forms

+ Add New Review Form Search Review Forms 🔍

Form Name	Date Created	Created By	
Sample Form	8/18/16 9:29 AM	Mario Clark	

First Previous 1 Next Last

Add Review Form

Title*

New Customer

Preview Form Edit Form Preview Thank-YouPage

Edit Thank-YouPage

Color Theme

Select a theme ▼

Save

Post Review Thank you page:

This is the page customers will see if they provide a 4 or 5 star review. This will ask the customer to please post a review on their preferred site. They can click on a link and it will take them to the corresponding store/location page they were tied to as a contact.

Thank you!

Thank you for your feedback! If you wouldn't mind, please take some time to publish this review for us!

- Review us on Yelp
- Review us on Google
- Review us on Facebook

- Campaigns 1
- Templates 2
 - Review Forms 1
 - Email Templates 1**
 - Review Widgets 0
- Account Settings

Manage Email Templates

+ Add Email Template Search Email Templates

Name	Date Created	Created By	
Sample Template	Aug 18, 2016 9:29:14 AM		   

First Previous 1 Next Last

Add Email Template

Title*
Blue and White Email Template

Logo
Upload or Select Image

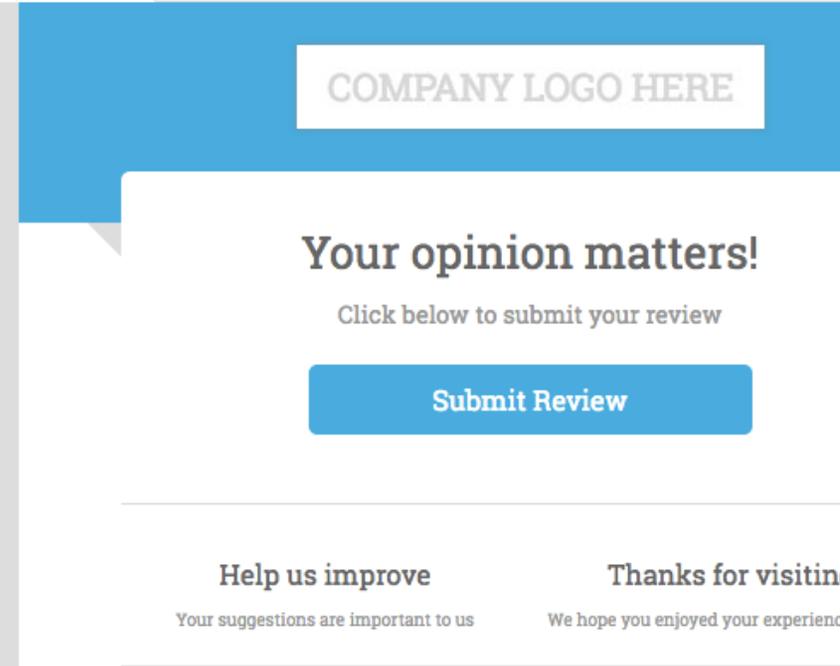
Heading
Your opinion matters!

Subheading
Click below to submit your review

Button Text
Submit Review

Left Heading
Help us improve

Preview Edit



EMAIL: Customize what consumers see when they receive your email. Upload your logo, edit any text using the text editors on the left.

- ← Campaigns 1
- ▼ Templates 2
 - 📄 Review Forms 1
 - 📄 Email Templates 1
 - 📄 Review Widgets 0**
- ⚙️ Account Settings

WIDGETS: Widgets can be used to display a stream of reviews to a web site or specific location page. There are 3 different display types to choose from.

Review Widgets

Select a starter template

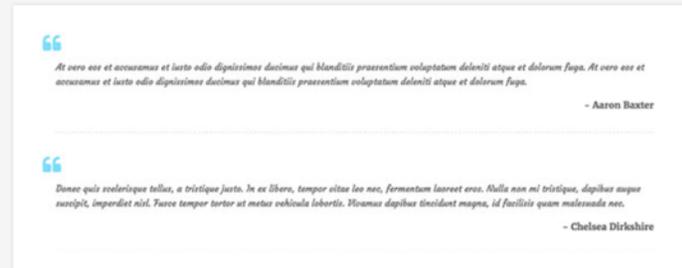
Responsive Template

A responsive template that lists reviews with author, stars, and date.



Basic List View

A clean template that lists reviews with author.



Carousel

A rotating carousel that displays reviews in a flash-card style format.



Snapshot Reviews Chatter Listings Rankings Media Workflow **Review Builder**

Campaigns 1

Templates 2

- Review Forms 1
- Email Templates 1
- Review Widgets 0**

Account Settings

Review Widgets

Select a starter template

Add Review Widget

Title*
Responsive Template

of reviews to be displayed
- 5 +

Minimum review rating
★★★★☆

Select a color scheme
Select a color scheme

Preview Edit Widget

See what people say about us

 **Hortense Milburn**
7/6/2016
★★★★★

Sed egestas tellus et felis tincidunt, vel dapibus nisi e...
Pellentesque sit amet rutrum tellus, ut luctus felis. S...
ultrices, arcu vitae tristique volutpat, erat libero lob...
ac commodo urna neque at ante. Aenean id ultrices...
Nullam id bibendum mauris. Nunc mattis, elit eget r...
pretium, ligula mi finibus nunc, vitae porta ante arcu...
Cras id mattis tellus. Curabitur eget eros in augue in...
congue at vitae orci. Cras tempor enim congue lorem...
vulputate massa imperdiet. Phasellus id ante dui. Cu...
lacus sed leo pellentesque tempus porta eget erat. M...
est at ipsum auctor rutrum. Cras aliquam, felis eu bl...
erat nisi auctor ligula, nec fringilla nisl tortor tempu...
Phasellus faucibus posuere suscipit. Maecenas sagitti...
non posuere leo faucibus quis. Sed est nulla, efficitur...

A rotating carousel that displays reviews in a main card style format.



Once you select a widget, customize it with your preferences. Decide how many reviews you'd like displayed on in the widget on your web page. You can also set up a filter to only display 4 or 5 star reviews on your site.

Rankings

Media

Workflow

Review Builder

3

Once you save your Widget, tie this to your campaign. Save this code and provide it to your web team to embed on your website/store pages. This will also be available on the Manage Campaigns section if you want to access it later.

Widget Successfully Saved

Almost there!

Now that you have created a widget, select a campaign below to generate your widget embed code

Campaign:

New customer

```
<script type="text/javascript" src="http://live.chatmeter.com:80/reviewBuilder/widget/script?widgetId=57706b36fdb44db9d1d7cdab&campaignId=57be0da78c94f63a578cbe80"></script>
```

Close

Campaigns 1

Templates 2

- Review Forms 1
- Email Templates 1
- Review Widgets 0

Account Settings

Manage Campaigns

+ Add New Campaign Search Campaigns

Name	Contacts	Reviews	Created By	Actions
New Customer	1	1	Mario Clark	   

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Account Settings

Security Settings

Default Visibility

Public: Items created by one user are visible to all others

Private: Items are only visible to the user who created them

Email Delivery

Deliver Emails From:

Default address (noreply@yourreviewsurvey.com)

Custom address

1. Verify Sender Email Address

Save Changes

ACCOUNT SETTINGS:

Security: Change your Review Builder campaign visibility to either Private or Public. Public will make your campaigns visible to any others users that can access your company's account. Private is just visible to you.

Email Delivery: To customize the sender email, you enter that here. This will trigger a verification email. You will need to log into that email and click on a link to approve the platform to send emails on your behalf.

Returning Customers

Date Activated: 8/1/16 Status: Active

Stats

Edit

Reviews 0

Contacts 1

Campaigns 2

Templates 10

Review Forms 6

Email Templates 3

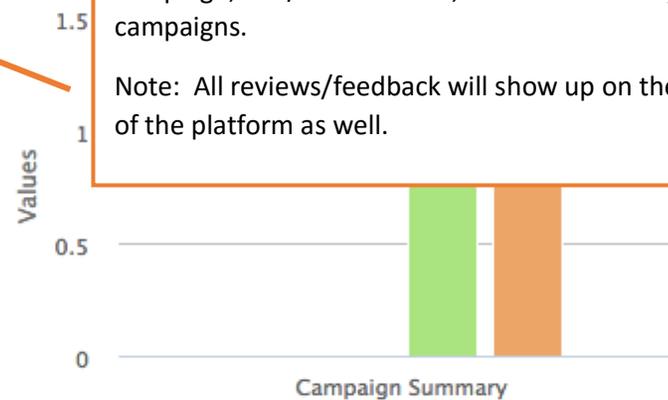
Review Widgets 1

Account Settings

Campaigns / Returning Customers

Returning Customers

Campaigns



Campaign Management:

Once you have campaigns set up, you'll have additional options here. By selecting a campaign, you can access it's stats, edit the delivery settings, see the reviews for that campaign, add/edit contacts, and return to all your campaigns.

Note: All reviews/feedback will show up on the Reviews tab of the platform as well.