

# Review Builder User Guide

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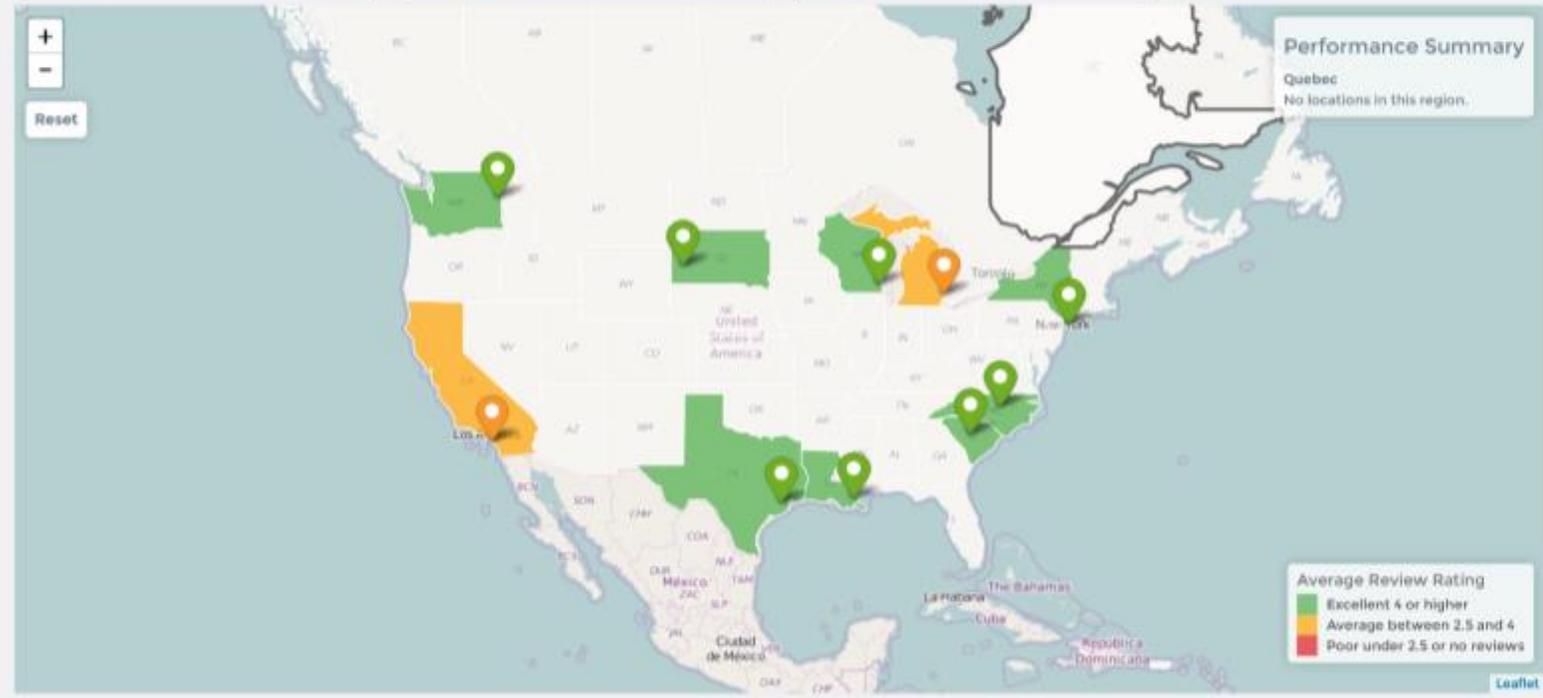
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# Overview

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

<b>REVIEWS</b> Last 30 days <b>252</b> <span style="color: green;">▲ 33%</span> Total <b>4,497</b>	<b>SOCIAL MENTIONS</b> Last 30 days <b>598</b> Total <b>598</b>	<b>LISTINGS</b> Added in last 30 days <b>113</b> Locations listed with Google Maps <b>100%</b>	Stores on page 1 on Google Maps <b>10</b> Stores before page 5 on Google Maps <b>100%</b>
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**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: TripAdvisor, Yelp  
 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: TripAdvisor, Yelp  
 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

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

COMPANY LOGO HERE

## Your opinion matters!

Click below to submit your review

Submit Review

Help us improve      Thanks for visiting!

Your suggestions are important to us      We hope you enjoyed your experience with us.

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

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 metrics.

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**

[Save Changes](#)

### Leave a Review

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

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

[Submit](#)

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\***

Preview Form     Edit Form     Preview Thank-YouPage

Edit Thank-YouPage

**Color Theme**

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

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

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

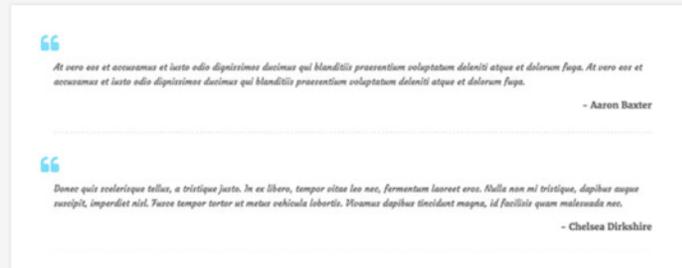
### Responsive Template

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



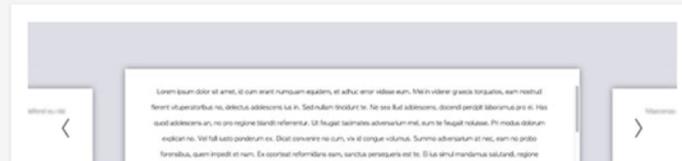
### Basic List View

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

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.

### Review Widgets

Select a starter template

#### Add Review Widget

**Title\***

**# of reviews to be displayed**

- 5 +

**Minimum review rating**

★ ★ ★ ★ ☆

**Select a color scheme**

Select a color scheme ▼

**Save**

[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...  
 ultricies, 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.



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	   

First Previous 1 Next Last

### 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

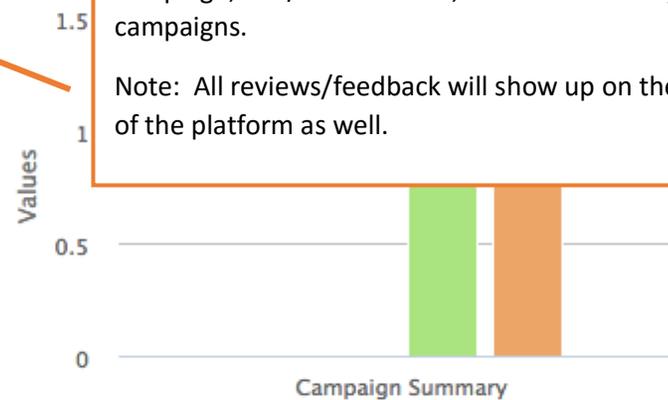
Review Widgets 1

Account Settings

### Campaigns / Returning Customers

## Return

### Campaign



#### Campaign Management:

Once you have campaigns set up, you'll have additional options here. By selecting a campaign, you can access its 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.