

# Birdeye(Reviews)

## General Setup

1. Run automation tool, This can be located in the Marketing Setup Files Drive  
<https://drive.google.com/drive/folders/1CKbG2h6so6cjjJEIh3H7eQzXKFtpGep?usp=sharing>
  - a. Select Birdeye Module
  - b. Fill in the Business information with the main point of contact for the Setup process.
  - c. Log into the Customer SMRT instance and create a Customer KPI report. Add any column to the report to show the API Code Button
  - d. Copy API Code from the top box. You will need to close and reopen the code once or twice to remove the delay code that is added.
  - e. Paste the API Code into the SMRT API Code box
2. The P.O.C. will automatically be emailed with the user name and password. They can reset the password at the login page if an issue occurs.
  - a. If additional Users need to be added
    - i. Open the Cleaner Instance.
    - ii. Select Settings > Account > Users
    - iii. Select "Add User"
    - iv. Add User under Single User. If multiple Fill out the Template located in the Drive Marketing Setup Files.
    - v. Fill out User Information and deselect Send an email invite
      1. Default the password to Smrt2022!
      2. This will need to be emailed directly to the user once the account has been created. They can update the password once logged in
    - vi. Select Role as Admin > Next

- vii. Save
- 3. Set up Business Profiles Settings > Profile > Business Profiles
  - a. For each Store, you will need to verify **Business information**
    - i. Companies with an ( ' ) in the name will need to verify that it was copied over properly. This name is pulled from Google and the translation will sometimes break and place "&apos;" in its place.
  - b. For **Media**, you will need to Upload a Profile Pic and Cover Photo. This can be requested from the new User or the following can be done.
    - i. Profile Pic will come from the business instance from Settings > business settings > System Setting > Company Settings > Business Logo.
    - ii. Cover Photo can come from a Facebook Page or Company Website.
  - c. For **Internal Use** change the Nickname of the Store to what is listed in the SMRT instance.
- 4. Set up Business Branding - Settings > Branding > Email and text
  - a. The header Color gets changed to White
  - b. Header Text gets changed to Black
  - c. Add logo, same as Profile Pic
    - i. If multiple brands click on "Customize location headers"
    - ii. Update each location with a proper profile pic
- 5. Customized work (optional)
  - a. Reviews Auto Replies.
  - b. Response Templates
  - c. Activate Webchat
- 6. Once the Set has been complete gather links for integrations Settings > Integrations > Google/Facebook/Twitter. Links will be provided for Facebook, Twitter, and Google. These will need to be emailed (along with SMRT Social Links) to clients so they can connect their accounts