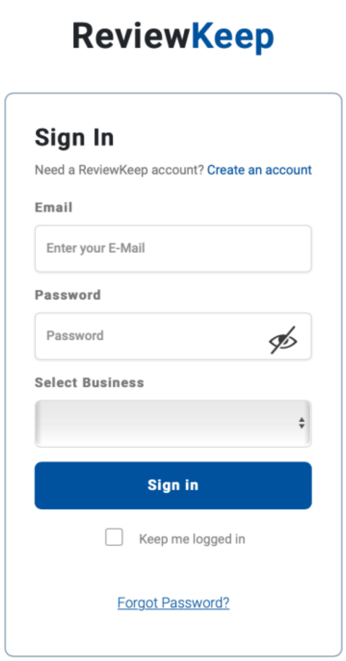
User Guide – ReviewKeep

Login

Enter username (Email) & Password and select your business. Click Sign in. You will be directed to your Dashboard.

Note: Create a new account if you have not signed up yet.



Header

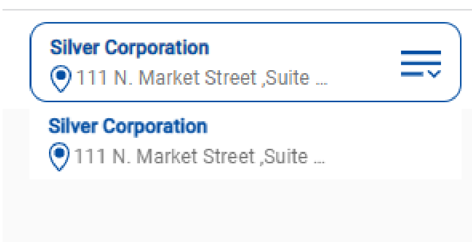
This section consists of Search field, Location, Notification, and User Profile.

Search Section

It is a customer-wide search that allows you to quickly search any information on your system. You can search by name, email, phone, or call record data.

Location

It displays the location of the business you are currently viewing. If you have multiple locations and want to change it, click on the location drop down box and additional locations will be shown. Select the location you want to view.

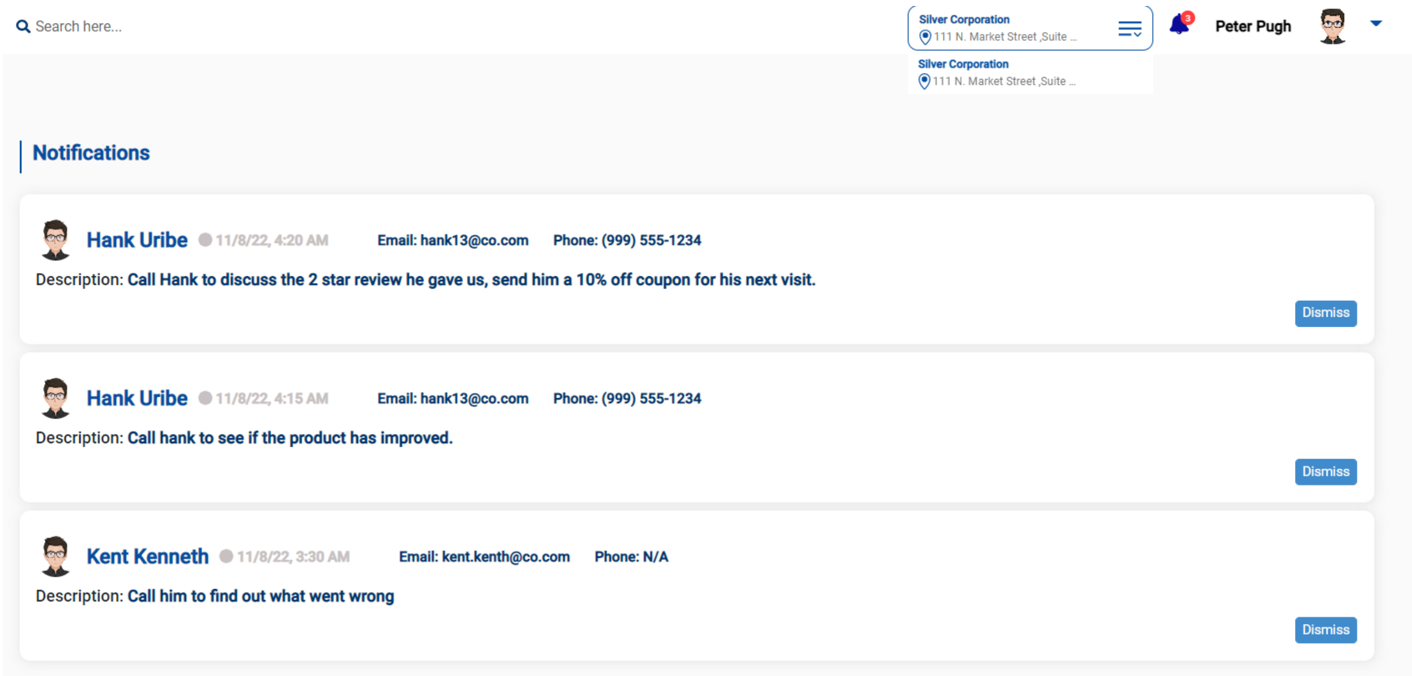


After choosing the location, all the data (reviews, customers and marketing) corresponding to that location will be displayed.

Note: Only users who has access given by an administrator to other locations can view them in the Users setup section.

Notifications

The bell icon will give you a number of reminders in the red circle that you have to review. Click on the bell icon and the notifications will appear.



You can address each notification separately. The date and time of the reminder you have set up can be seen next to the customer's name. You also have their contact information and reason for the reminder.

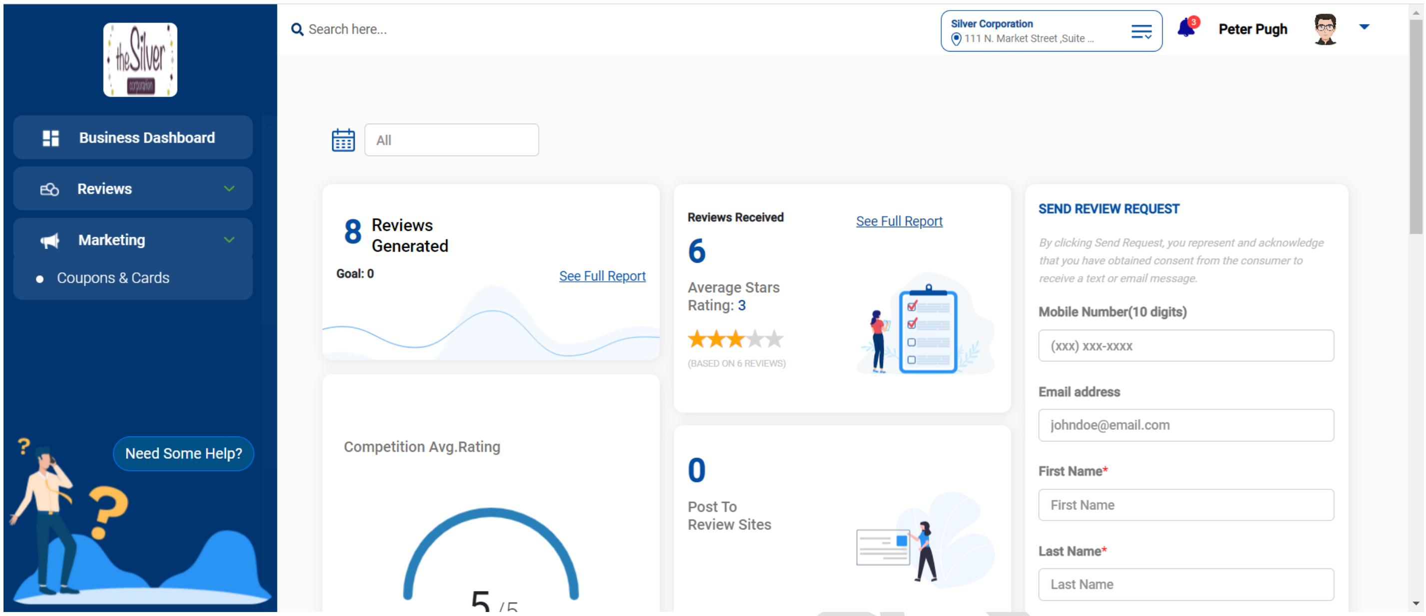
Once you have taken care of the reminder/appt, select Dismiss button to dismiss it. Reminders will not disappear until you dismiss them.

User Name and User Image

The username and image is displayed next to the notification icon. By default, ReviewKeep assigns a stock image whenever a person signs in to the system. You can change it to an actual picture or any other avatar you want to use by Upload user image option in the User Setup section.

Business Dashboard

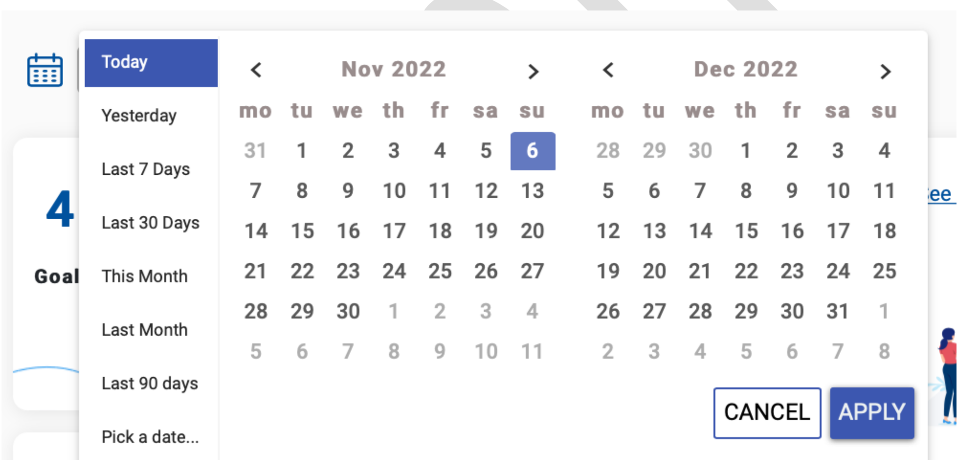
Once signed in, you are directed to your company Dashboard. On the dashboard you can see several sections laid out in box format such as Header, Reviews Generated, Reviews Received, Competition Avg.Rating, Post To Review Sites, Send Review Request, Customer Service, Recent Review, Review Sites, and 12 Month Average Review Request Rating.



Calendar Icon

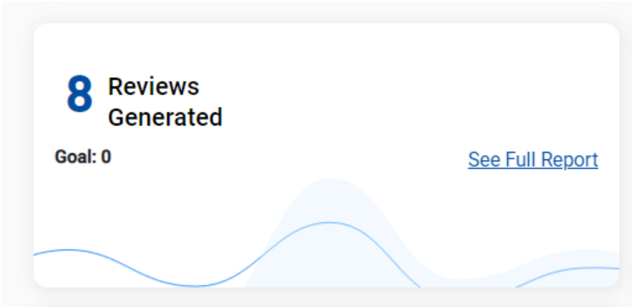
By default, calendar is set to “All” that means it displays all data related to your reviews, ratings, customer service, and review post since your subscription began.

If you want period specific data, then click on the calendar icon and select from the pre-set time periods such as yesterday, today, this week, last week, last month, last 90 days, or pick a date. This will change your dashboard to reflect only that data from the dates selected.



Reviews Generated

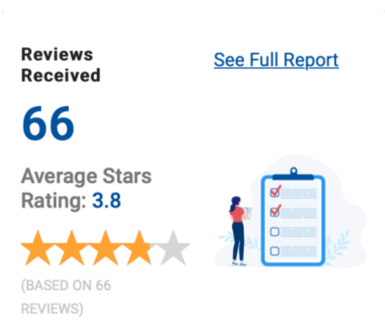
Depending on the dates selected, this section displays all the reviews that have been sent out by you and your team. For example, if you have sent 8 review requests to customers during that date period, a numerical value “8” will show up next to Reviews Generated.



You can click on See Full Report to be taken to the Review Requests page to show all details of your Review Requests, including those that have been received and those that are still pending, along with their specific details.

Reviews Received

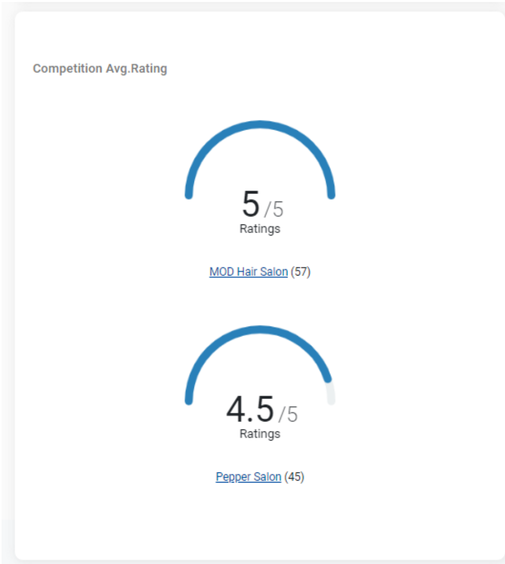
Depending on dates selected, this section displays all the reviews that have been received from your review requests. These are the review requests that have been sent to customers and have been completed and sent back. This section also shows you the average rating of the reviews you have received.



Note: These are internal reviews only, not publicly posted reviews. Only the positive (4-5 star) reviews get requested to post publicly and they are tracked in the Review Requests page, which you can see by navigating to that page, or clicking on the See Full Report in the dashboard box.

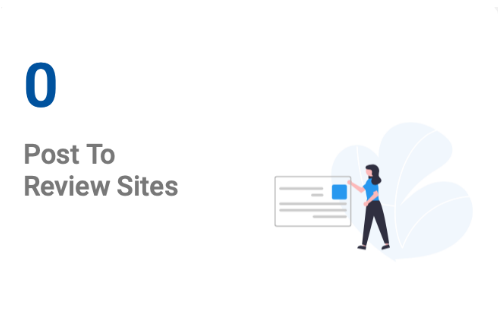
Competition Average Rating

Competition Average Rating shows your competition that you set up in the Competitor section during your initial set-up. These are the two competitors you chose (if you completed this section) to track against your ratings. Their star rating and the number of reviews are shown in this box. Tracking competitor rating as well as how many rating they have is helpful as not only are stars important, but number of reviews generated as the higher number of reviews, the more customers trust review score.



Posts To Review Sites

This section will show reviews posted to your site.



Google and Facebook will show actual postings as they track the numbers correctly on the Review Requests page whereas Yelp does not allow this tracking. So, we do a "best guess" by tracking if the customer clicks on the link to publicly post. On Yelp, we count that as a Public Post, but we are not sure if they have actually followed through and publicly posted to the site.

Yelp public posts will have to be verified manually by you by opening your Yelp business site and confirm whether those posts are live or not. It also has a very strict verification process and unless a user has a bit of history with Yelp, they may classify the review as "not trusted".

Customer Service

This section shows you how many review requests have come back as 1, 2, or 3 stars. Industry standards have these three as not positive to your review score. 3 may be average, but it does not entice people to visit or purchase from you, so it is considered a score you do not want to post.

You can also see in this section how many customers you or your customer service team have contacted to resolve unsatisfactory customers. If they are resolved (positively), the final number is how many have been resolved.

Customer Service

3	1	1
Received	Contacted	Resolved

Recent Reviews

Recent reviews shows all your recent INDIVIDUAL reviews on all review sites we are monitoring. So, if you have Google, Yelp, Facebook all set up, we will monitor all those sites and post the most recent reviews from each one. These are based on most recent, so if all of the most recent ones are from Google, all reviews in this section will be from Google. If two are from Google and one from Yelp, then that is what you will see on the dashboard. You will see the name of the person who left the review, the site they left the review on, as well as the score they gave to your business.

Recent Review — See full report

NAME	FROM	REVIEW SCORE
Trung N.4 photos	yelp	5
Trung N.4 photos	yelp	5
Kapo K.	yelp	4

Review Sites

This section shows the entire site score and number of reviews. So if you have Google, Facebook, and Yelp, accounts, you will see all three with the average review score and number of reviews.

Review Sites — See full report

Name	REVIEWS	AVERAGE SCORE
YELP	332	3.7
FACEBOOK	4	5
GOOGLE	50	3.4

Send Review Request

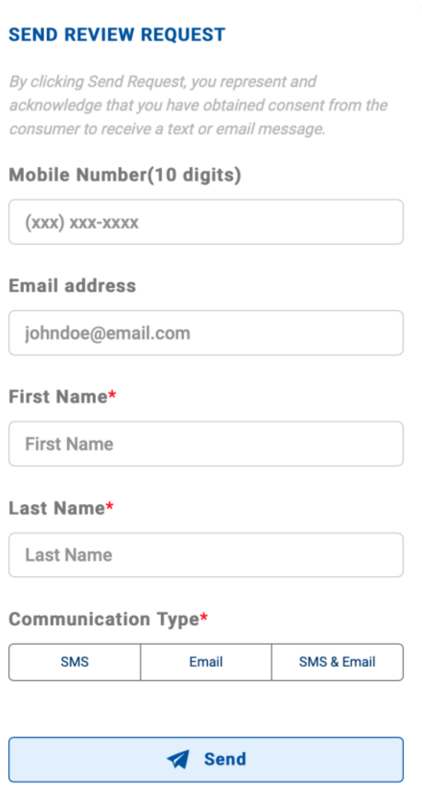
This is the heart of your system. It is where you will generate all of your review requests and get feedback and trigger public posting of positive reviews. If it is not a positive review, give to your customer support team. When a customer arrives, you request their name and contact information (mobile number, email, or both) and seek their permission to send them an SMS, an email, or both for feedback.

Customer Data Entry

Enter your customer's data either mobile number or email address, First Name, and Last Name to initiate the review request.

Now, select the Communication Type based on the customer's preference either by Email or SMS, or both. This communication preference is then registered in the system and will be used for all future communications with them unless it is changed in the system.

Click on Send.



This does two things. It sends the review request as an SMS or email or both (as you chose), and it also inserts the customer into the customer (CRM) section of the ReviewKeep system. Once they are in the Customer section, you can further track all communications and reviews from the customer section as well as document notes or create reminders.

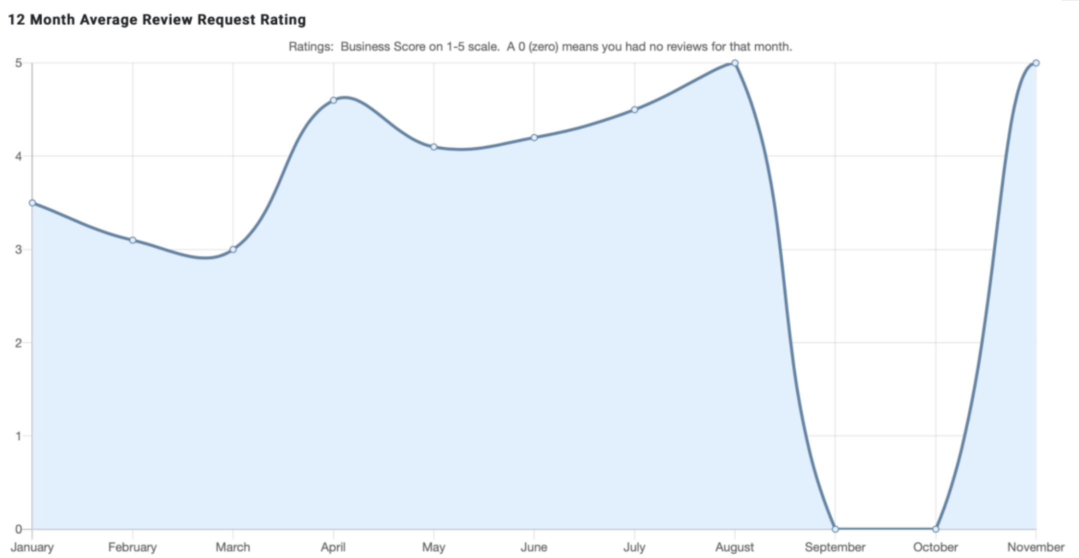
See [Customers](#) section in the user guide for full details on the ReviewKeep CRM capabilities.

Note: If the customer is a return customer, their name will come up automatically as you start typing in any of the sections. The system will recognize email addresses, mobile numbers, first name, and last name. If a same number or email or name comes up, confirm it's the same person and then decide if you want to send them another review request. If they have recently reviewed, it is probably best to hold off on sending them *another one. Industry standard is sending people new review requests once per year if they have already reviewed a product or service. However, if it's a different product or service, then sending another review request is acceptable.*

12 Month Average Review Request Rating

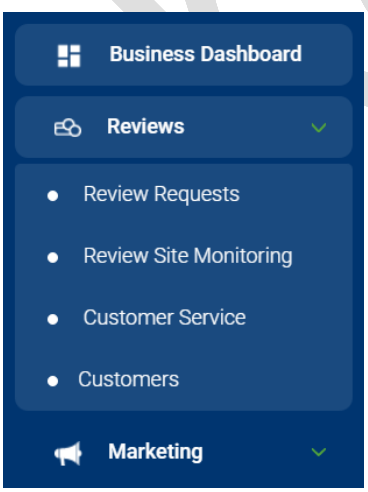
This section shows a graph about ratings of your business score on 1-5 scale across 12 months on internally received reviews only (not publicly posted).

Note: If you see a 0 (zero) that means you did not receive any review requests for that month (you either did not send them out, or no one responded to your requests).



Reviews Tab

This section is available on the left pane. Select the drop down next to Reviews to see the list of Review Requests, Review Site Monitoring, Customer Service, and Customers.

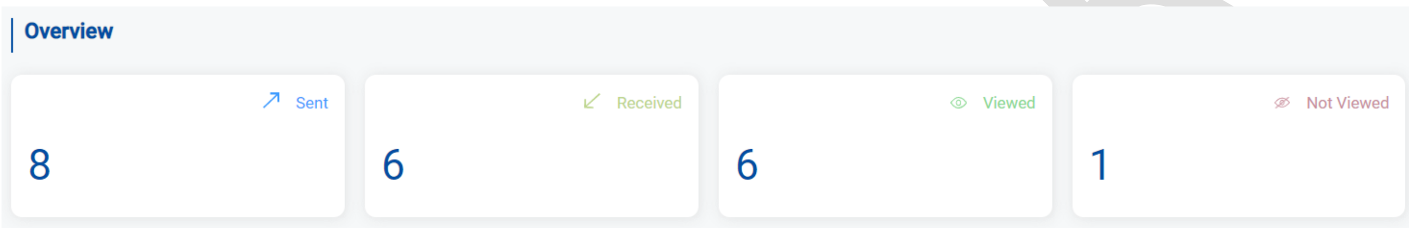


Review Requests

Review Requests section is where you track all your company review requests that have been sent to your customers. This section gives you an overview of all requests sent, received, viewed, not viewed, top keywords on the requests received, tracking responses, as well as the ability to initiate manual reminders.

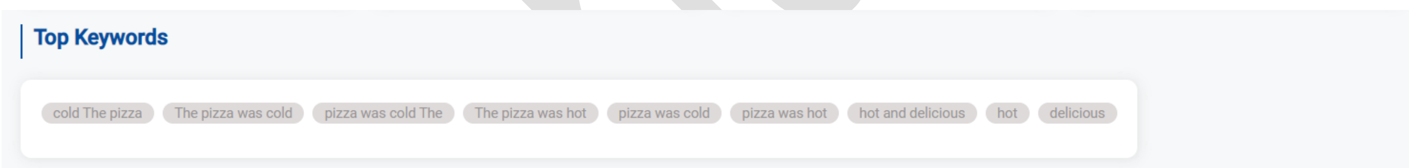
Overview

This section gives you a quick snapshot of how many requests have been sent, how many have been received, read, and remained unread (texts and emails).



Top Keywords

Top Keywords are words and phrases that your customers are using when responding to the private review requests. These are NOT publicly posted, they are only internal review request keywords. The system picks up on frequently used keywords and shows you the most common words and phrases.

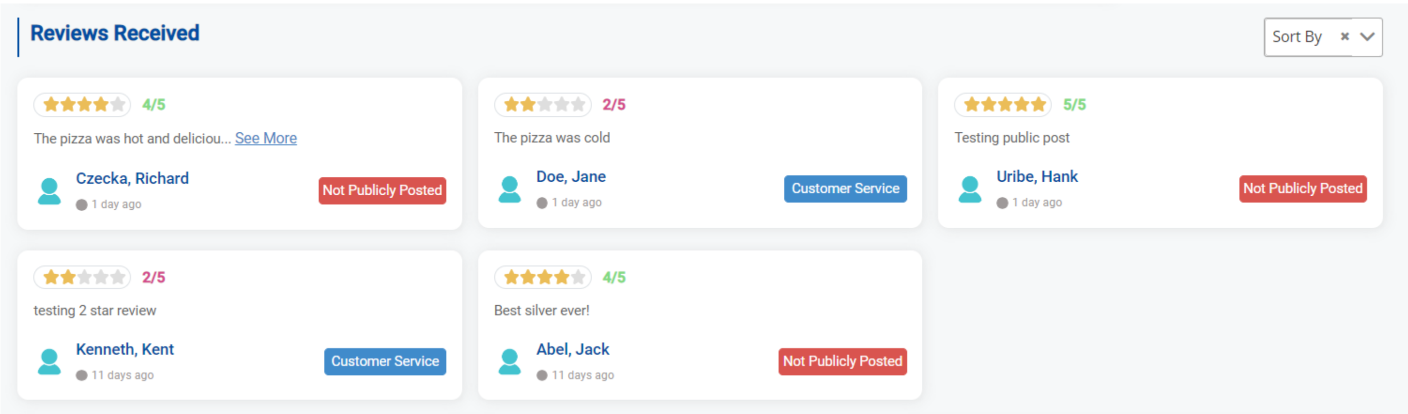


Reviews Received

Reviews Received is your starting point to review, analyze, and take action on all reviews received from your requests to customers. This section will show you all the reviews that have been completed and sent back by your customers. Each customer will have their own box that shows their rating (1-5 stars), their comments, customer name, date, and status of the review.

The status on positive reviews will show you if it's been publicly posted or not. If it's been publicly posted a green box will state "Publicly Posted" and no further action is required. If it's not been posted, then a red "Not Publicly Posted" will be shown. On these, the automated reminder system will send the customer 3 reminders per the reminder schedule that has been setup, as long as you have the automated reminders turned on (they are turned on by default). If you have turned automated reminders off, they will not receive reminders unless you send them manually (you can do this in the Public Post Reminders section at the bottom of the page).

If the review was a poor review (1-3 stars), there will be a blue Customer Service box. You can click on the Customer Service box to get further action items and track the customer service process for rectifying the issue.



Reviews Sent (Not Responded)

The Not Responded section for Reviews Sent gives you all the requests from customers that have not been completed. This section will show you the customer name, date sent, and if reminders have been sent from either the automated system (if you have that on), or manual sends if you have sent any manual reminders.

You will also see how each request was sent, either by SMS/text, email, or both. You can also see if they have viewed the request or not. You can send any manual reminders from this section by checking the box next to their name and clicking the blue Send Reminder button at the top of the column.

Review Sent
(Not Responded)

Send Review Reminder ☐ SELECT ALL

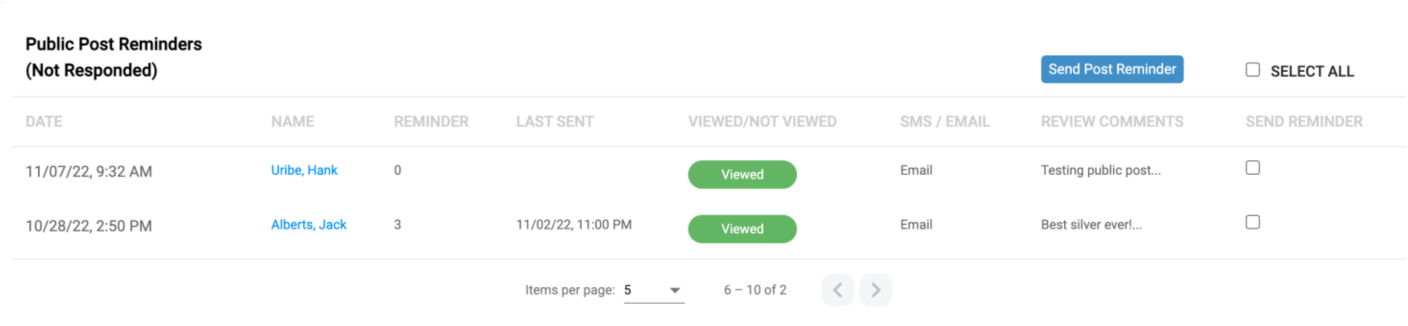
DATE	NAME	REMINDER	LAST SENT	VIEWED/NOT VIEWED	SMS / EMAIL	SEND REMINDER
11/07/22, 9:30 AM	Uribe, Henry	0		Not Viewed	Email	☐
11/06/22, 9:03 AM	Allberts, Kellyy	0		Viewed	Email	☐

Items per page: 5   6 – 10 of 2

Public Post Reminders (Not Responded)

The Not Responded section for Public Posts gives you all the customers who have not yet publicly posted their positive reviews (4 and 5 stars). Since these are your best reviews, you will want to try to get as many of these publicly posted as possible. This section will show you the customer name, date positive review received, and if reminders have been sent from either the automated system (if you have that on), or manual sends if you have sent any manual reminders.

You will also see how each request was sent, either by SMS/text, email, or both. You can see if they have viewed the request. You can send any manual reminders from this section by checking the box next to their name and clicking the blue Send Reminder button at the top of the column.



Public Post Reminders
(Not Responded)

Send Post Reminder
SELECT ALL

DATE	NAME	REMINDER	LAST SENT	VIEWED/NOT VIEWED	SMS / EMAIL	REVIEW COMMENTS	SEND REMINDER
11/07/22, 9:32 AM	Uribe, Hank	0		Viewed	Email	Testing public post...	
10/28/22, 2:50 PM	Alberts, Jack	3	11/02/22, 11:00 PM	Viewed	Email	Best silver ever!...	

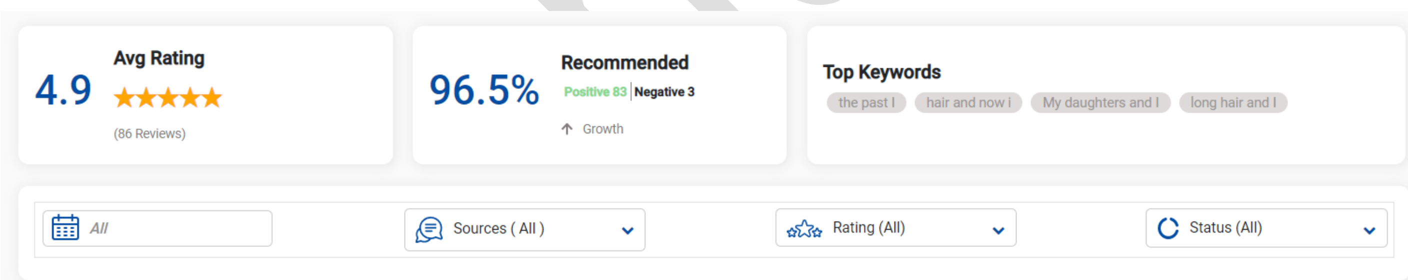
Items per page: 5 6 – 10 of 2

Review Site Monitoring

The Review Site Monitoring page tracks all PUBLICLY posted reviews. These reviews may have been posted by customers responding to your review requests, or that have directly gone to your review sites independently to post. These are the reviews that everyone can see. It's important to track your public posts and respond to them as well. Negative reviews should especially be responded to with a rational for the issue or for an apology as appropriate. Some businesses offer refunds or replacements or other compensating actions for poor experiences per your company policy.

Overview / Banner Section

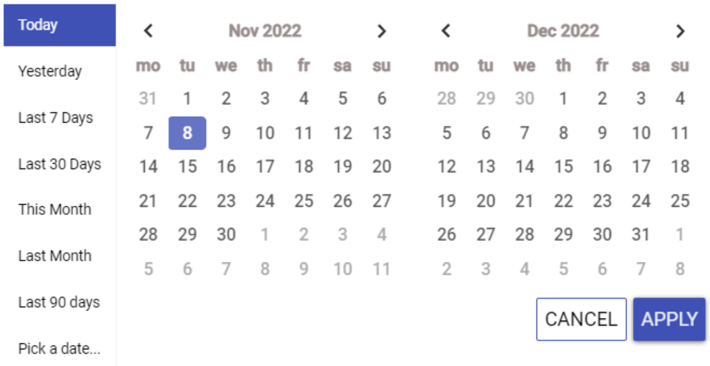
This section gives a summary of your public reviews. It gives you the average rating and number of reviews across all sites that are being monitored. You will get a percentage recommended by rating and also keywords that are being said about your business.



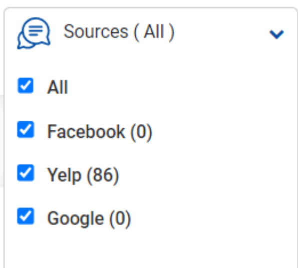
Filters

The filters section allows you to customize what you are viewing.

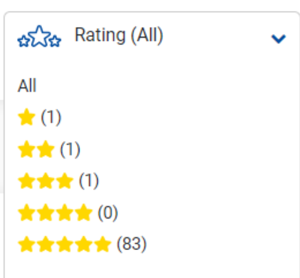
The calendar gives you the option of preset dates, or customized dates to view ratings. For example, you can look at all ratings to date, the last week, the last month, year to date, or customize a date range you desire and select Apply. Select Cancel to remove all dates.



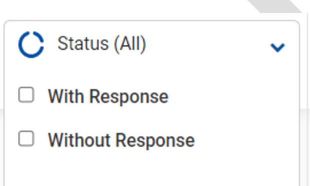
Sources gives you the ability to view by review site, so you can view all or pick only the review sources you want to include.



The Rating drop down menu allows you to view by star rating, so if you only want to see 4 and 5 star ratings, you can select the 4 and 5 star boxes or if you want to view and respond to your poor ratings only, select 1, 2, and 3 star boxes.

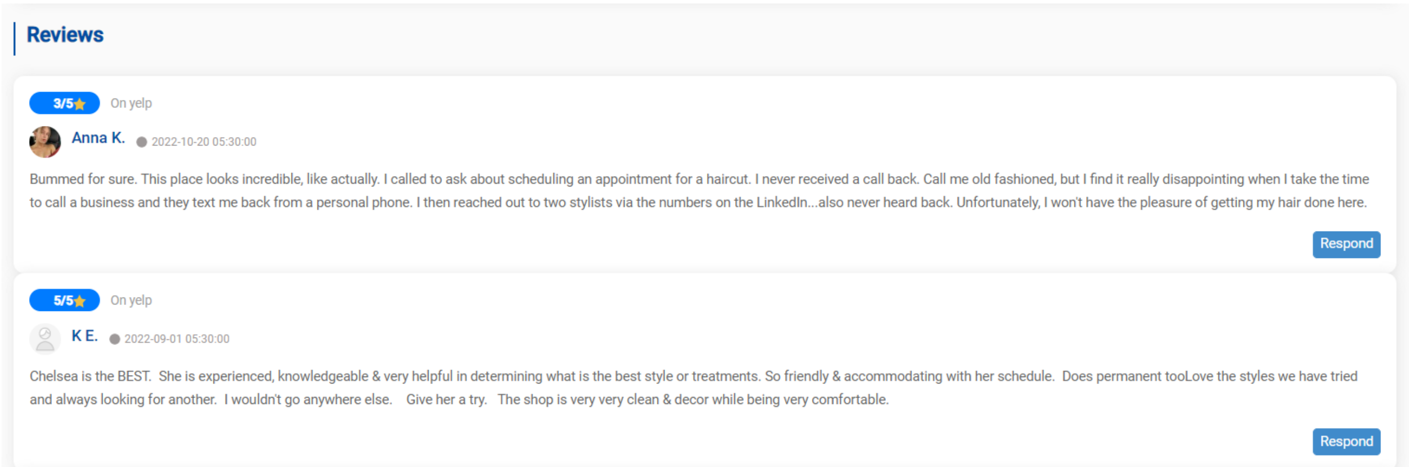


Status drop down menu allows you to filter on reviews that you have already responded. For example, if you want to quickly respond to reviews you have not addressed yet, select Without Response to see only those statuses. Similarly, select With Response to see only those statuses.



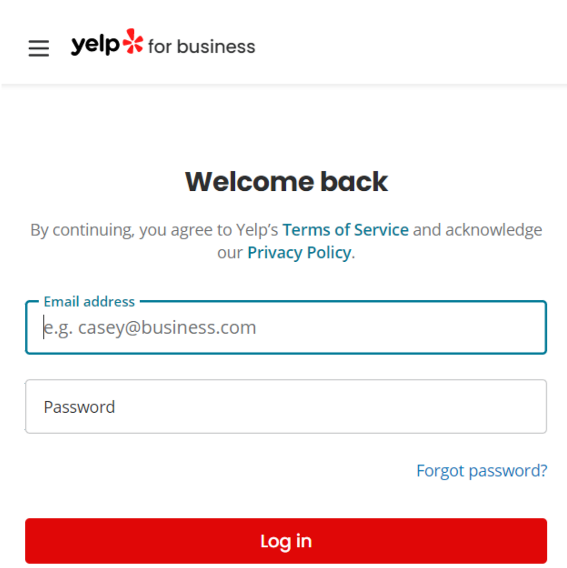
Reviews

These are the publicly posted reviews being pulled in from the big traffic review sites of Google, Yelp, and Facebook. This shows you the customer name, the review score, the date of the review, and the review comments.



For Google and Facebook, you can respond directly in the ReviewKeep app to each public posting from your customers by clicking on the blue Respond icon in the customers review box.

For Yelp, you cannot respond directly within the ReviewKeep app due to Yelp policies. When you click on the blue Respond icon, you will be directed to the Yelp site for business website.



Login directly on Yelp site and search for the specific posting you want to respond to.

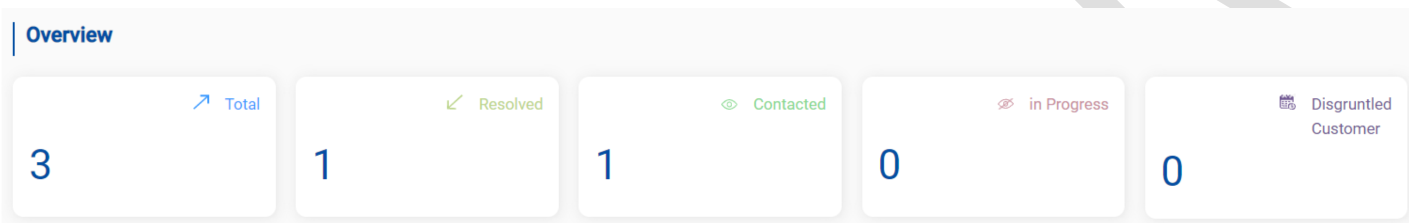
Customer Service

Customer Service is where you can view all your customers who have responded to the company review requests (private internal reviews only, not public) with a 1, 2, or 3 star review. The ReviewKeep system automatically classifies these ratings as poor and are sent to Customer Service.

This section allows you or your assigned customer service reps to review and respond to customers as quickly as possible so you can interact and appease them before they go public with their comments. It’s important to respond to customers as quickly as possible, as the quicker you can communicate with customers, the less likely they will independently post to public sites. The customer service section is a great way to remedy dissatisfied customers quickly.

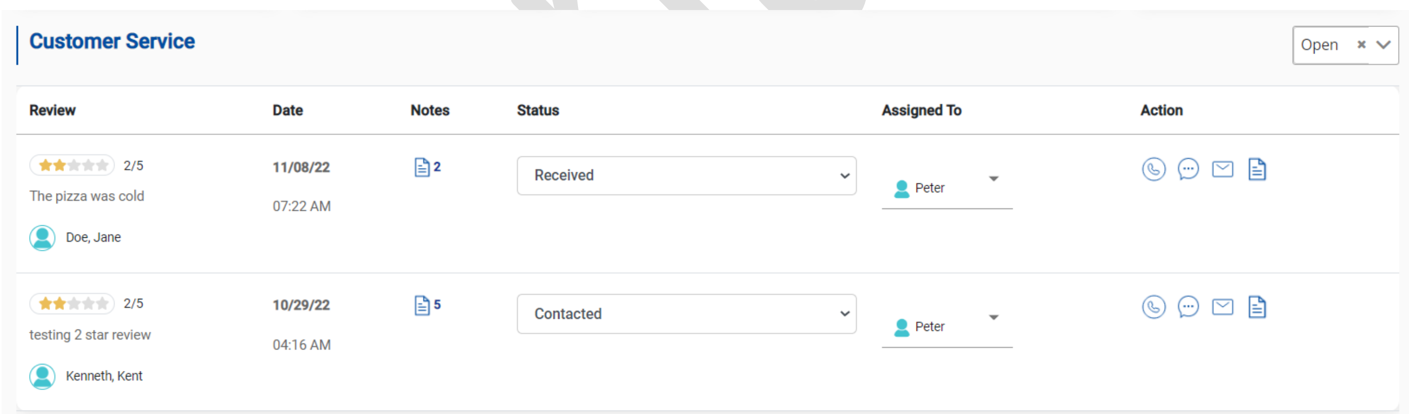
Overview

This section gives you a quick snapshot of how many customer service tickets have been received, resolved, contacted, in progress, and disgruntled customers (meaning you have tried to resolve the issue but they were not successful). In the below snapshot, you can see how you and your customer service team are doing in handling customer service tickets.

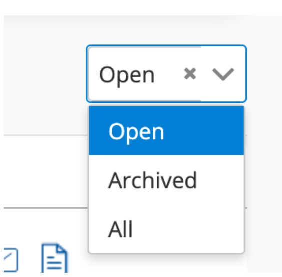


Customer Service

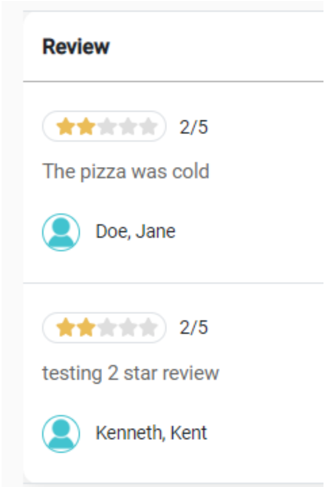
This section shows information about the Review rating, Date and Time, Notes, Status, to whom it is Assigned, and the action to be taken.



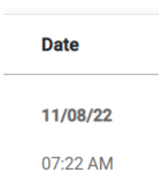
By default, the Customer Service section shows you all tickets that are currently open. However, if you want to see archived or see all tickets, select the desired ticket from the Sort By drop down menu.



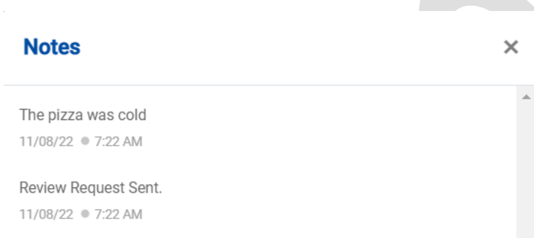
The customer review rating and comments are shown in the Review column, along with their name.



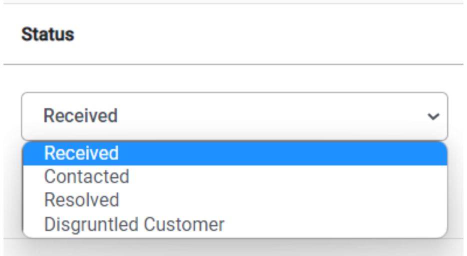
The Date column gives you the date and time the review was received.



The Notes column allows you to click on the document icon to see all notes to date with the customer, these would be notes that you entered into the customer record and also any send outs by email or text to date.

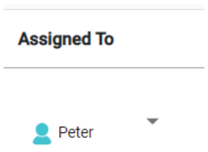


The status column allows you to change the status of the customers. The customer status is set to Received when the ticket first arrives. Then as you progress you can mark it as contacted (you can reach out and contact the customer), Resolved when you resolve the situation to both you and your customers satisfaction, or Disgruntled if you cannot resolve the situation or have tried to contact but were unable to address the issues.

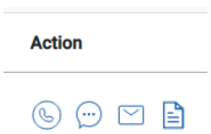


Note: Maintain the correct status in the Customer Service section as well as the Customer portal (tickets are automatically logged and updated on each customer record in the Customer section), allows you to handle future interactions with the customer with full background knowledge.

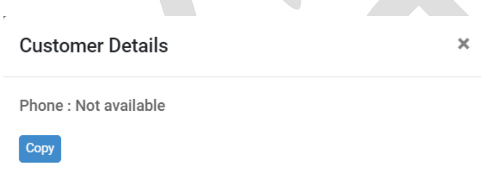
Assigned To column shows you who the Customer Service Rep is for that customer. You can assign different customer service reps by clicking on the drop down menu and selecting a different rep to handle specific people. By default, the rep is assigned to the person who signed up for the ReviewKeep account. Changes to Customer Service reps can be made in the Setup → Users section. You can have one or multiple reps in the system.



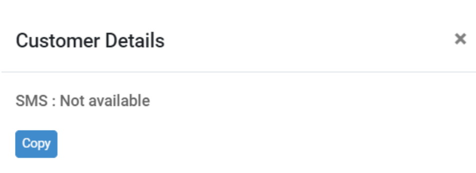
Action icons are clickable and they will bring up pop-up boxes for their specific tasks.



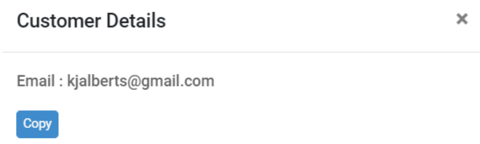
The phone icon brings up the customers phone number so you can call them.



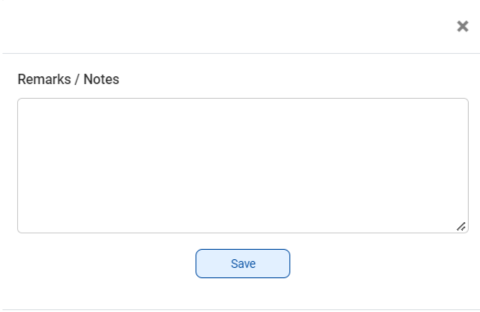
The text icon brings up their cell phone so you can text them.



The email envelope icon brings up their email address to send an email.



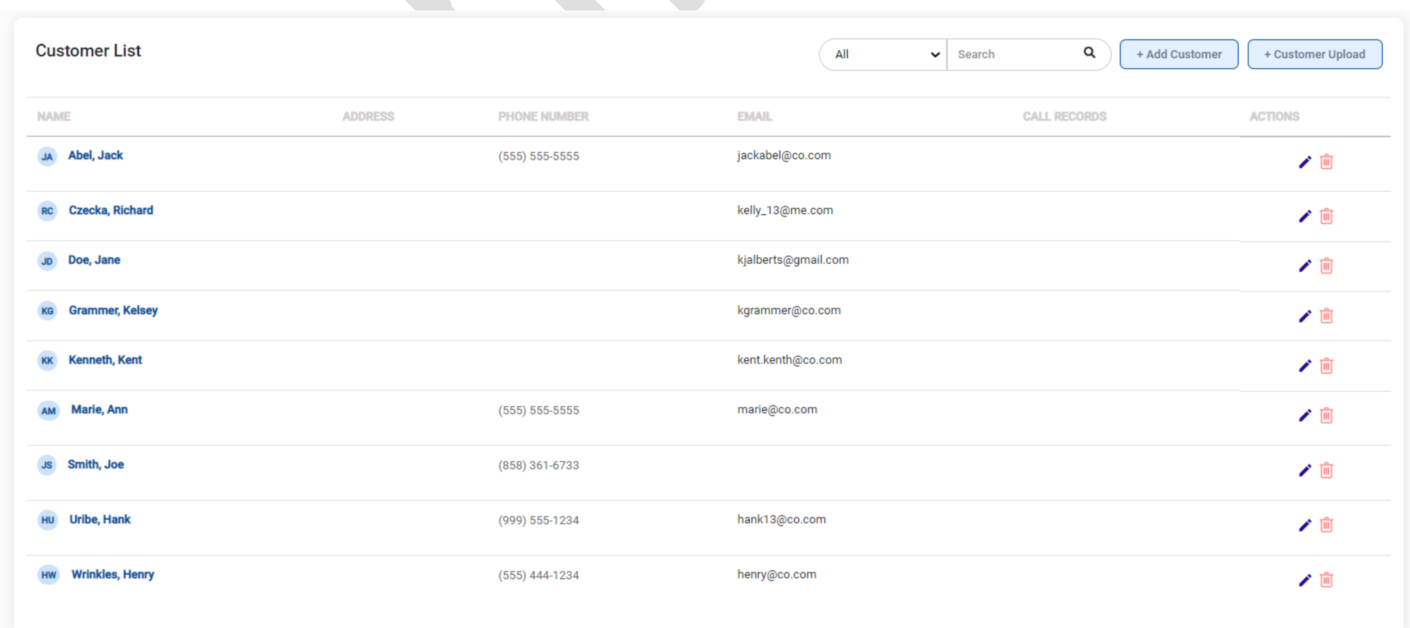
Finally, the document icon will bring up notes for you to insert any notes from calls or other modes of communication or progress notes into the customer record.



Note: In the Customer Service section, any communication for emails or call or texts must be made from your phone or email account. To make it easy, the pop-up boxes have a copy feature which allows you to copy the phone or email address and paste into your email or phone app.

Customers

The Customers section is a CRM for your customer information and it tracks all review send-outs, cards, coupons, call records, contact information, date of birth (for sending birthday cards or birthday coupons) and can be used to set reminders for upcoming events.

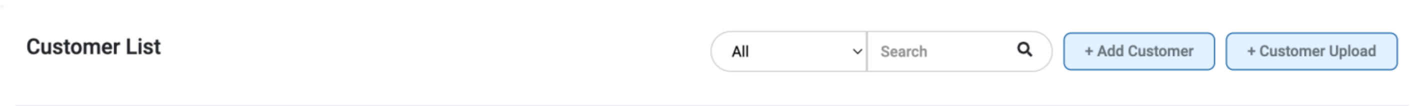

Customer List

All | Search | + Add Customer | + Customer Upload

NAME	ADDRESS	PHONE NUMBER	EMAIL	CALL RECORDS	ACTIONS
JA Abel, Jack		(555) 555-5555	jackabel@co.com		
RC Czecka, Richard			kelly_13@me.com		
JD Doe, Jane			kjalberts@gmail.com		
KG Grammer, Kelsey			kgrammer@co.com		
KK Kenneth, Kent			kent.kenth@co.com		
AM Marie, Ann		(555) 555-5555	marie@co.com		
JS Smith, Joe		(858) 361-6733			
HU Uribe, Hank		(999) 555-1234	hank13@co.com		
HW Wrinkles, Henry		(555) 444-1234	henry@co.com		

Header Section

The top of the customer section has information and several action items that can be taken. First is the Customer Name column which shows as you scroll down all the customers in your company list. The next section is a master search which allows you to search all customer information, including name, contact information and call records. The drop down menu allows you to do a master search of all customer information, or you can narrow your search by specific fields.

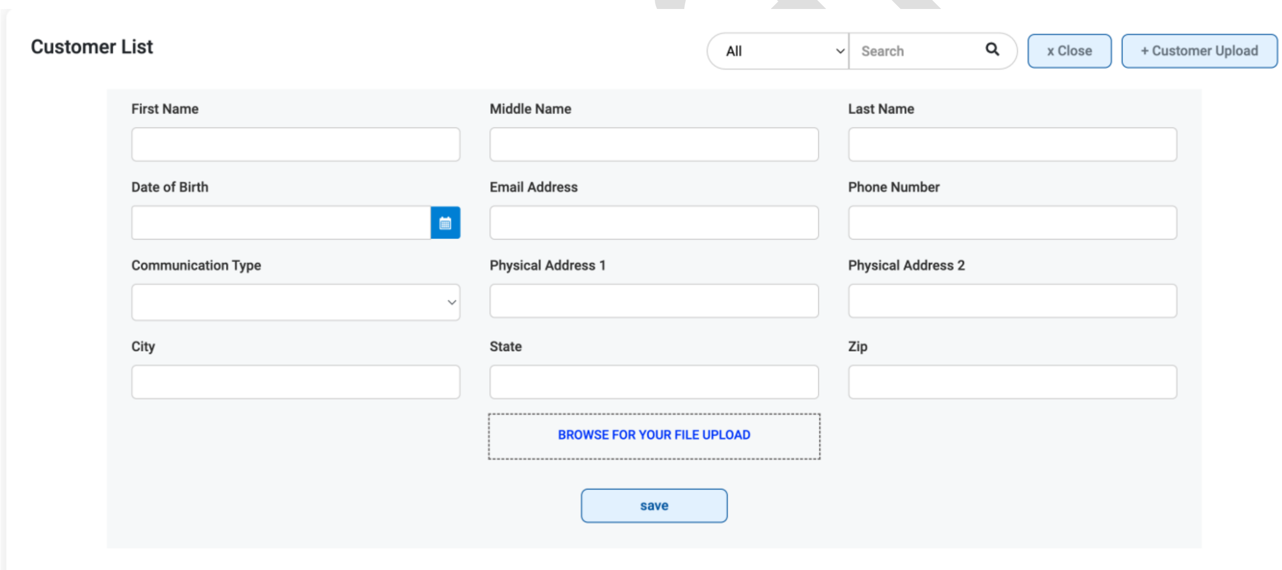


A customer is automatically added if you send them a review request from the dashboard. If a review request is not sent, click on Add Customer button to add them to your system.

Note: The other information such as date of birth, mailing address, or customer image can also be updated here by using Add Customer option.

Adding a Customer

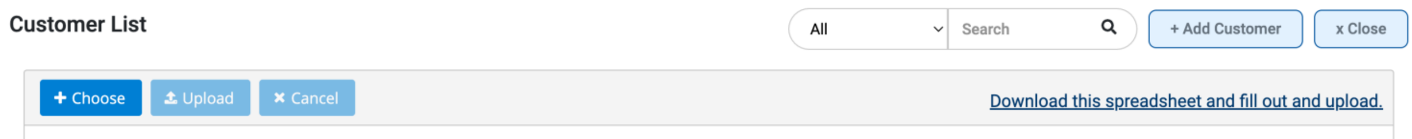
Click on the Add Customer button. The fields for data entry will appear.



Fill out all the desired fields or the information that you have, upload an image if available, then click save. The customer is now saved to the system and all information entered is searchable by the search function.

Customer Upload / Import

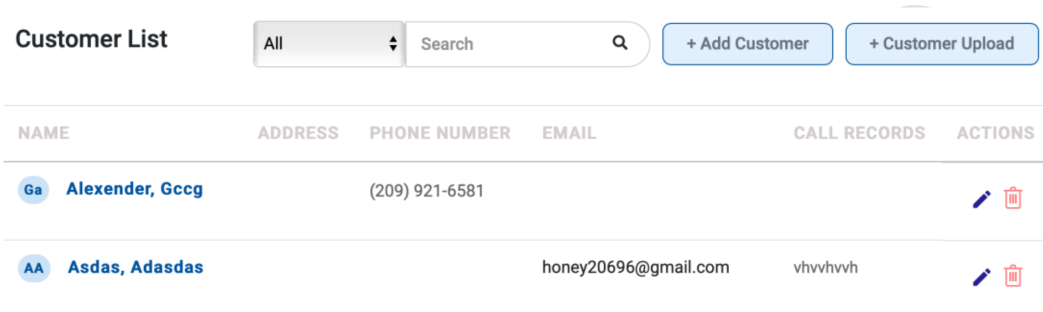
Customer upload allows you to do mass customer uploads so you don't have to individually enter each one. This can be done if your customer list you are importing is in an excel spreadsheet in either xlsx or csv format. ReviewKeep requires the customer fields to be in specific columns. Download the template from the Customer Upload section.



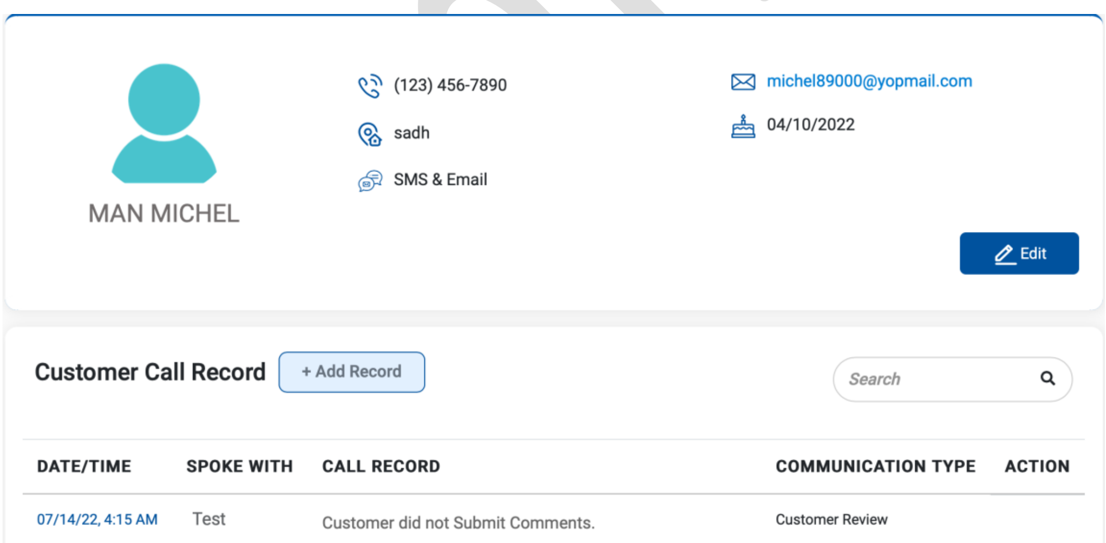
Take your customer data and load it into the template. Save it to your computer, then click on the Choose button to browse and select the desired file. Now, Upload and Cancel button will be enabled automatically. Select Upload button and all customer data will be imported and inserted into the correct fields.

Customer List

The customer list is shown in alphabetical order. You can see the name and contact information in list form, with truncated call records. You can edit or delete records from this view as well.

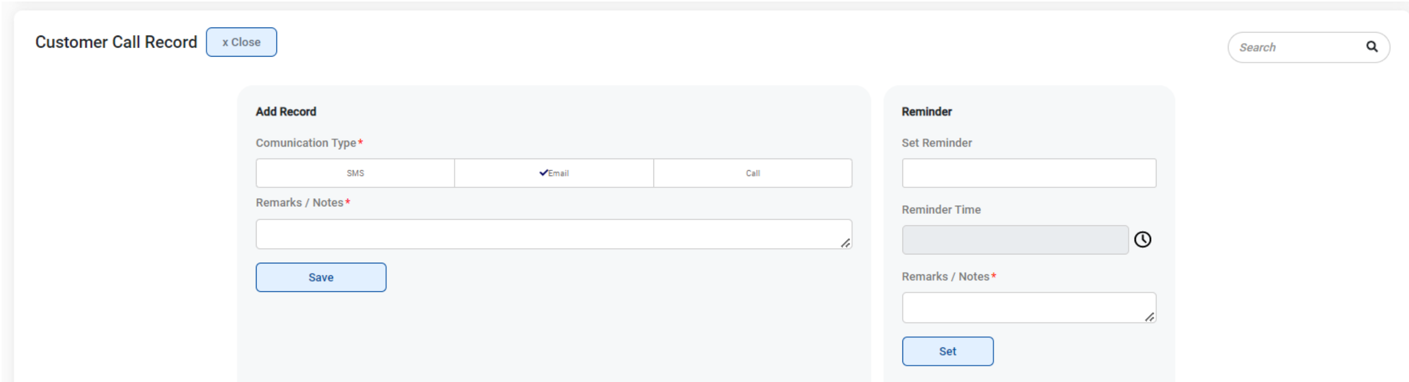


Clicking on a specific name will bring up that individuals record. From this record, you can see full details on all history of calls, emails, requests, cards, coupons, contact information, and more. You can also click on the Edit icon to modify any information that has been changed.



Adding Record

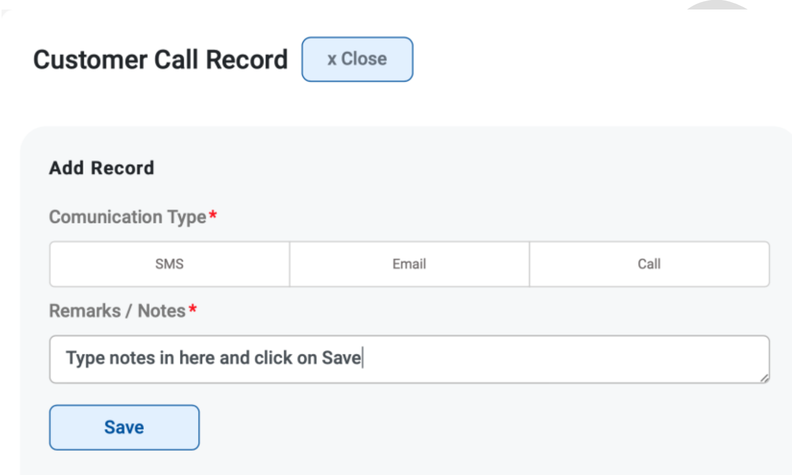
To add a record, click on the Add Record button. This opens up a box where you can update a call record and also set a reminder.



Add Record

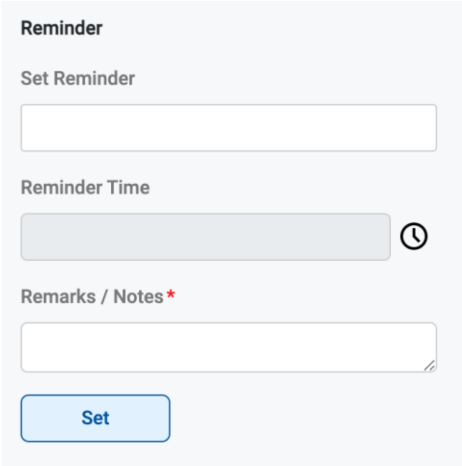
This inserts the call record into the customer call record history, with most recent call record showing up on top, oldest one at the bottom.

Select the preferred Communication Type as SMS, Email, or Call. In the Remarks/Notes section, enter your comments to be saved to the call record. Select the Save button.

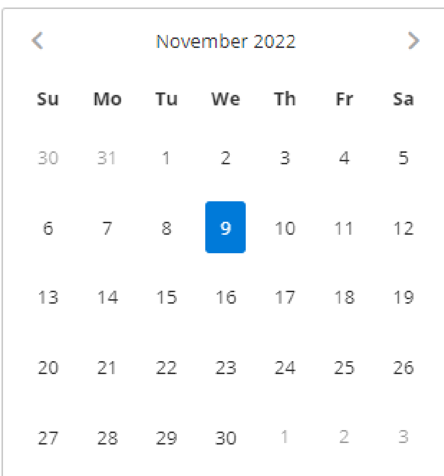


Reminder

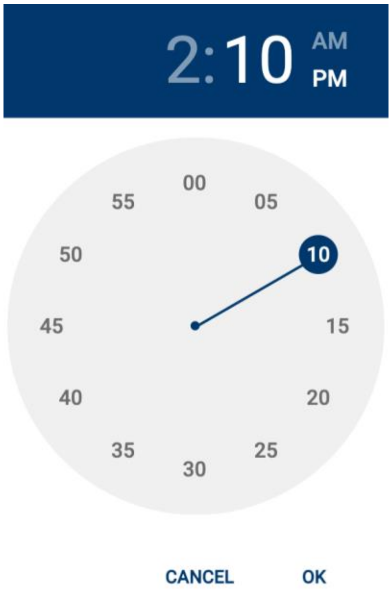
ReviewKeep allows you to set reminders for future actions. If you spoke to a customer and told that you would reach out at a future date, the reminders will track this for you.



Click in the Set Reminder field. A calendar box will pop-up. Select the desired date you want the reminder to be on, it is then inserted and saved.



Click on the clock icon next to Reminder Time field to set the time. Clock will pop-up. Select the desired Time by selecting the hour first from 1 through 12 and similarly, do the same to select the minutes. Select AM or PM. You can drag the line to set something other than 5 minute increments if desired. Click OK. The time is now inserted and saved.



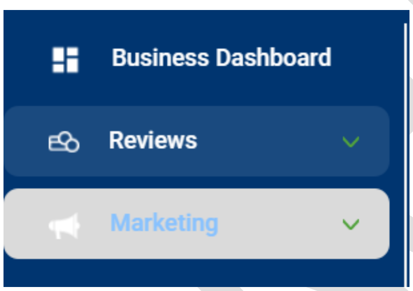
If you need to start over or don't want to save the date and time, click cancel.

Enter your remarks in the Remarks/Notes section and click on Set. This will save your reminder.

All reminders will show up on the bell icon at the top of page header. If you have a number on the bell, it means you have reminders to view.

Marketing

The marketing section of ReviewKeep allows you to send your customers cards and coupons.



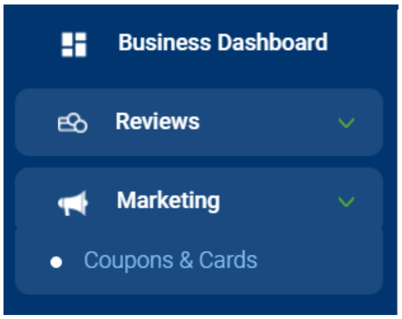
Coupons & Cards

Coupons & Cards can be found under marketing drop down menu. Cards can be used for any occasion and there are templates for holidays, birthdays, and anniversaries. Coupons can be sent if you want to send discounts off products or services with a percentage or dollar off option. There is a basic and an advanced mode for both cards and coupons, with basic using our templates, and advanced allowing you to do your own designs.

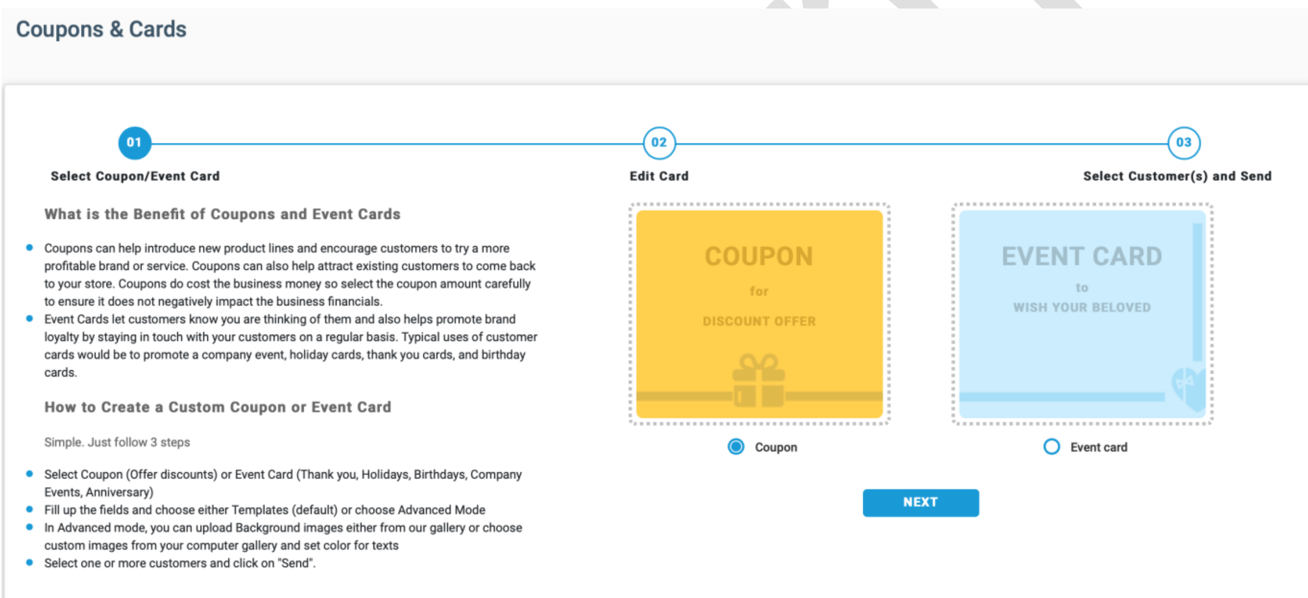
The subscription level determines how many cards or coupons you can send each day. Silver allows 10 per day, Gold allows 100 per day, and Platinum allows 1000 per day.

Selecting Cards or Coupons

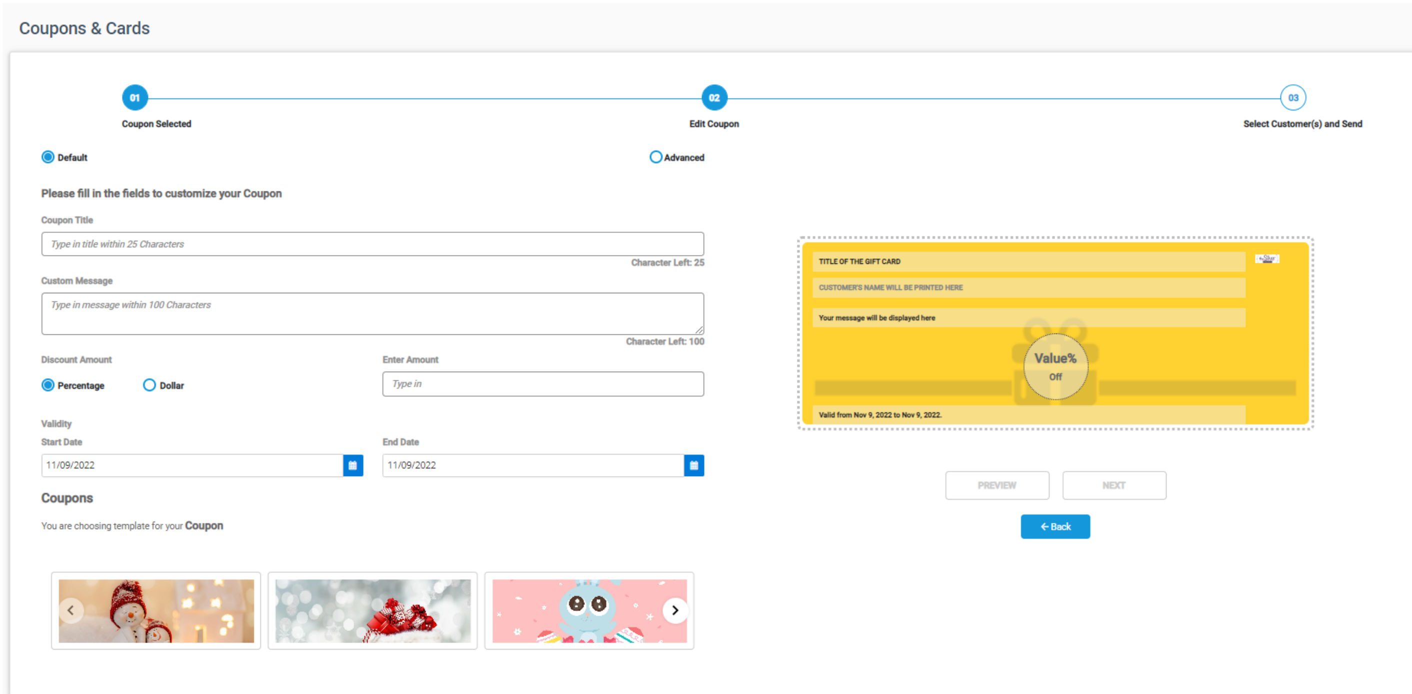
Click on Cards & Coupons from the Marketing drop down menu.



You will be directed to the Coupons & Cards – Select Coupon/Event Card page.



Select Coupon radio button and click Next button. You will be directed to the Coupons & Cards – Edit Coupon page.



By default, Default radio button is selected and is the easiest to use.

Customizing the Coupon

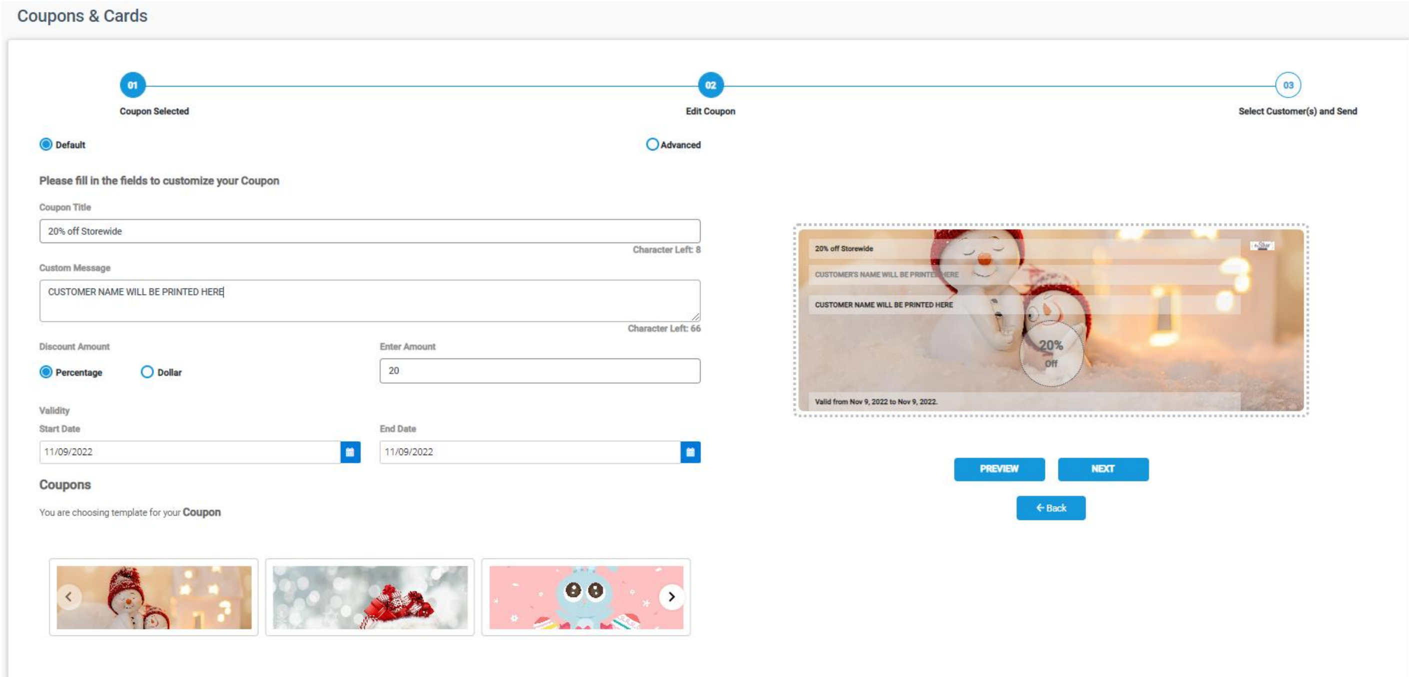
First enter the Coupon Title, such as “20% off Storewide” or “$1 off any Coffee”. This tells the customer what the coupon does for them.

Next, enter message in the Customer Message field.

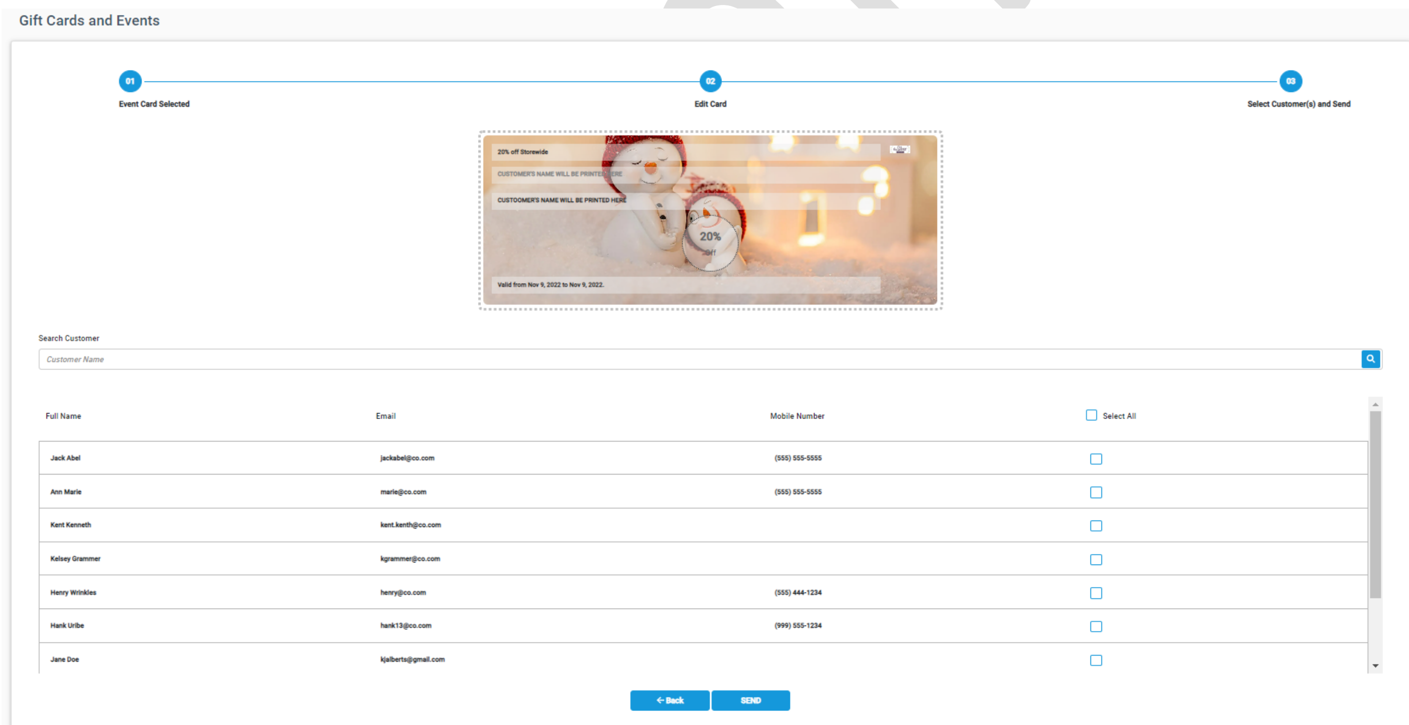
Select Discount Amount as Percentage or Dollar if you want to give the customer a percentage off, or a dollar amount off and enter the amount in the Enter Amount box.

Select the dates you want the coupon to be valid for, both starting and ending date.

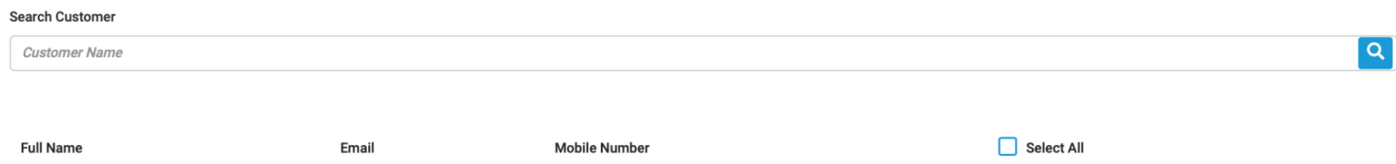
Select a template from the Background section. Click on Next. After filling in the fields, the coupon will be generated and preview will be displayed on the other side.



Select NEXT button. You will be directed to Gift Cards and Events - Select Customer(s) and Send page.

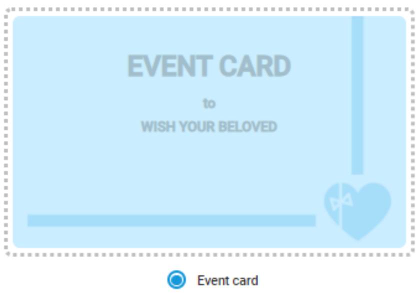


Select the desired customers from the list (if required search specific customer using the search bar and select). Once all customers are selected, click on Send to send the card to all your selected customers.



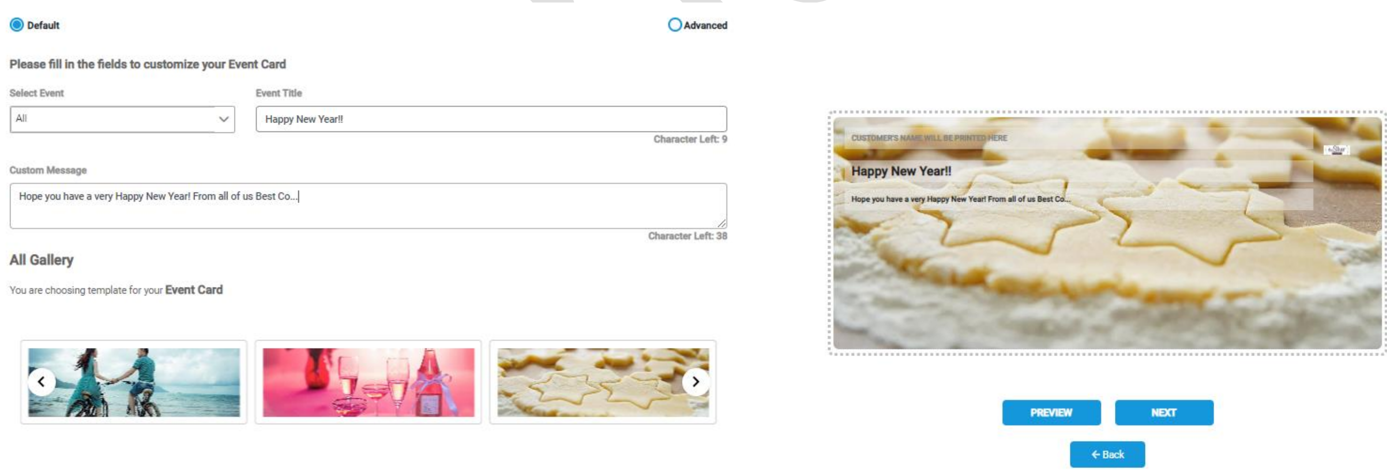
Cards

Navigate to Cards & Coupons. Select Event Card radio button. Click on Next.

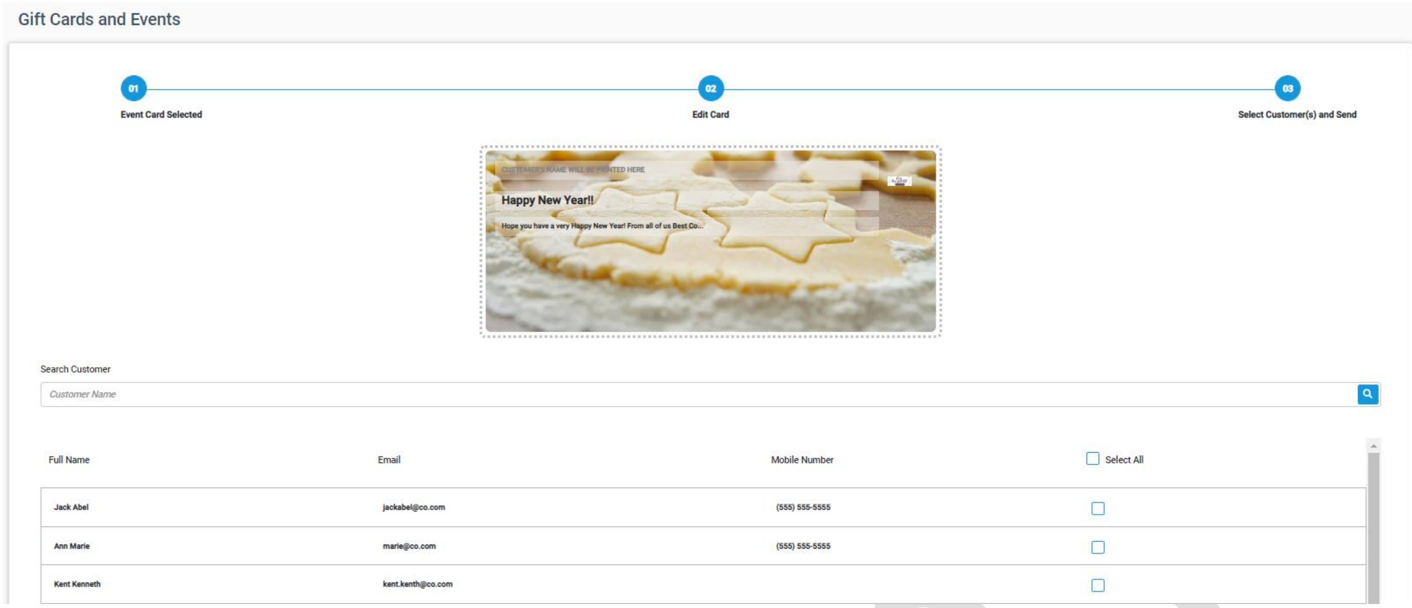


Select the Event you are sending between Company Event, Holiday Cards, Thank you Cards, Birthday Cards, and Anniversary Cards. Depending on your event, the background images will change to reflect the event.

Enter the Event Title and enter the Message you want to send your customers. After filling in the fields, the coupon will be generated and preview will be displayed on the other side.



Select NEXT button. You will be directed to Gift Cards and Events - Select Customer(s) and Send page.



Select your customers from the list or search bar and send the card.