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ReviewKeep Setup Guide

Social Profile Setup

After signing in to your account for the first time on ReviewKeep, you are directed to the Social Setup page, as the app cannot send and receive review requests until you have at least one Social Review Site for your company has been setup.

Logout

Setup Your Social Link
Please enter your companies at least one social profile link. After entry, you can use the ReviewKeep Application.

Go to Dashboard

Account Name	Account Type
URL	Account ID

Add

Page Name	Page Id
URL	Account Type

Add

Yelp URL

Type in

Don't know Yelp URL? [SEARCH](#)

Add

On the social profile setup page, you have the choice of adding any of the three review sites (Google, Facebook, and Yelp). Google and Facebook require authentication to log into your account to work with ReviewKeep.

Note: ReviewKeep does not keep any login information of your social accounts.

Adding Google or Facebook Account

Click on the Add button and you will be prompted to authenticate your account. Allow Permission to authenticate your account.

The screenshot shows a form titled "Setup Your Social Link" with two main sections for Google and Facebook. Each section contains fields for Account Name, URL, Account Type, and Account ID, all of which are currently empty (N/A). Below each set of fields is an "Add" button.

Once authenticated, the added Social Profile (Google or Facebook) will now be added to your ReviewKeep account. If either Google or Facebook are authenticated, all your reviews that have been entered on those sites will be shown up on your Review Monitoring page within the ReviewKeep app.

Adding Yelp Account

You need not require any authentication for Yelp. Simply add your Yelp URL used for your business. If you know your Yelp URL, insert it in the Yelp URL field and select Add button.

The screenshot shows a form titled "Yelp URL" with a text input field containing the URL "https://www.yelp.com/biz/hellbent-for-hair-vista". To the right of the input field is an "Add" button. Below the input field, there is a link that says "Don't know Yelp URL? SEARCH".

If you do not know your URL, select the SEARCH button available next to Don't know Yelp URL?. Search Yelp URL section will appear.

Enter your company details and select Search button to find your URL.

The screenshot shows a form titled "Search Yelp URL" with two search methods. The first method, "Using Phone No.", has a dropdown menu and a text input field labeled "Enter Phone Number". The second method, "Using Other Details", has a text input field labeled "Enter Business Name" and another labeled "Enter location". Both methods have a "Search" button below them.

Once you see your business page, select Add button. ReviewKeep saves it to your profile. It might take up to 2 hours for Yelp reviews to start appearing in your Review Monitoring page.

Note: On March 29, 2019 Yelp modified their [Terms of Service](#) and changed how you can gather customer reviews. Please read Yelp's guidelines before enabling this feature for Yelp.

The last section is to add any Additional Review Sites. Select the desired site from the drop down menu of specialty review sites that your company may utilize depending on your industry. Once you select one of the specialty sites, you will need to enter your company URL.

Additional Review Sites to Add - These sites will be added to your Review Public Post Requests:



Note: These specialty sites are used for review posting requests only, and will not show up on the Review Monitoring page, only Google, Yelp, and Facebook reviews will be shown on that page.

Once all of your review sites are setup, you are now ready to send review requests to your customers, gather their feedback, and request public posting on all 4 & 5 star review responses. Your customers will have the choice of selecting one or all of your review sites for public posting. For example: If you have set up Google, Facebook, and Yelp, your customers that give 4 & 5 star reviews will have the choice to select any of those for posting.

Competitor Section

The final section in the Social Setup section is for Competitors. ReviewKeep allows you to monitor two of your closest competitors to see how they are doing on their social review sites. It's a good idea to know what your competition is doing and how their customers feel so you can compare to your organization.

Competition Avg. Rating



Taco Bell



Chipotle

In the Competitors Link field, you can search and find your competitors review site to monitor their business.

Enter their business name and location and click on the Search URL link. A list of businesses will come up, select the one you want to monitor and click on Add.

Search Yelp Url

A form titled "Search Yelp Url" with a close button (X). It has two sections: "Using Phone No." and "Using Other Details". The "Using Phone No." section has a dropdown for "United States(+)" and a text input for "Enter Phone Number". The "Using Other Details" section has text inputs for "Mcdonalds" and "Cupertino, CA". Both sections have a "Search" button. Below the "Using Other Details" section, it says "Search Results(3)" and lists three results: "https://www.yelp.com/biz/mcdonalds-cupertino-2" (selected), "https://www.yelp.com/biz/mcdonalds-san-jose-30", and "https://www.yelp.com/biz/mcdonalds-san-jose-18". There is an "Add" button at the bottom.


Repeat the process again if you want to select a second business. Once done, you can now follow these businesses on your Dashboard Competitor section.

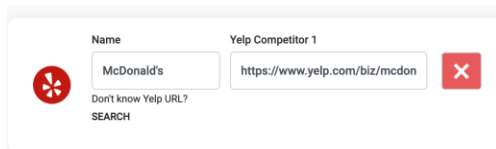
Competitors Link

Enter your competitors social review link to monitor their progress and star rating and click submit to start tracking them.

A form titled "Competitors Link" with a close button (X). It has two sections: "Yelp Competitor 1" and "Yelp Competitor 2". Each section has a "Name" input field and a "Yelp Competitor" input field. The "Yelp Competitor 1" section has "Man Eaters" and "https://www.yelp.com/biz/mcdonalds-cupertino-2". The "Yelp Competitor 2" section has "Enter Name" and "https://www.yelp.com/biz/pepper-salon-livermore". Both sections have a "Don't know Yelp URL? SEARCH" link and a red "X" button.

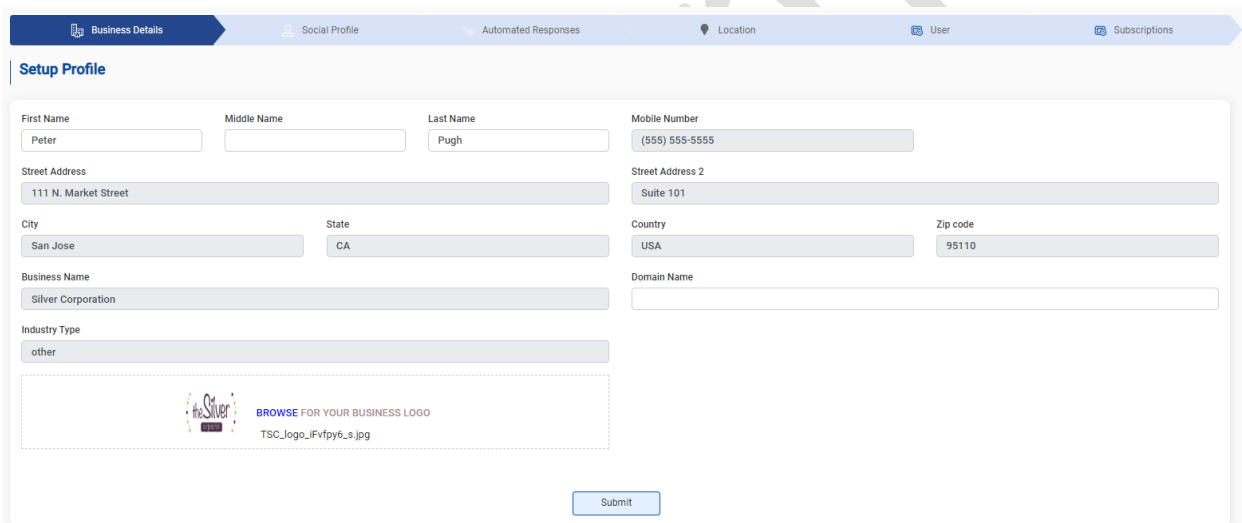
Select the Update button.

If you want to remove a competitor, simply click on the red  button to remove them and replace it with another company you want to show up on your Dashboard.



Business Details

Once your Social Review Sites are set-up and authenticated, you are ready to complete the last few setup items. Navigate to Business Details within Setup. All of your information from your sign-up will be pulled into this section. If something has changed on your company (address, name, and contact information), edit and change as required.



Set up your company LOGO as it will be used in all Review Requests, Cards, and Coupons that you send. Click on the BROWSE button to add logo to your Business.



This will bring up your computer folders window. Navigate to your company logo file and select it. The logo must be in either a .png, .jpg, or .eps format.

Next, insert your company domain (website address) in the domain field for email send outs.

Domain Name

Select Submit button. This completes the Business Details section.

Automated Responses

Review Requests

This is the heart of your ReviewKeep system. When customers make a purchase, you can send them a text message (SMS) or an email. This requires you to gather their mobile number or email address, ignore if it's already in the system. For more details, refer to ReviewKeep User Guide.

For the setup, you need to simply keep the default messaging, or you can create your own message. The default messaging is already chosen for you, and the wording of the messages can be seen in the Setup Review Responses section.

Note, there are two messages, one for SMS/Text messages and one for Email. The system is defaulted to Email.

Setup Review Responses

Email

☒ Review Request ☐ Review Reminder ☐ Post Reminder

☒ default

Hi **John Smith**,

We appreciate your business and are constantly striving to improve. Would you mind submitting a review of your recent experience? It would be highly appreciated and informative!

Hi **John Smith**,

We appreciate your business and are constantly striving to improve. Would you mind submitting a review of your recent experience? It would be highly appreciated and informative!

It's really easy and takes a few seconds, just click on the star rating you want to give us, leave a few comments, and click send!

Thanks!

Business Name

Rate your Experience from 1-5 stars

1

2

3

4

5

Unacceptable

Poor

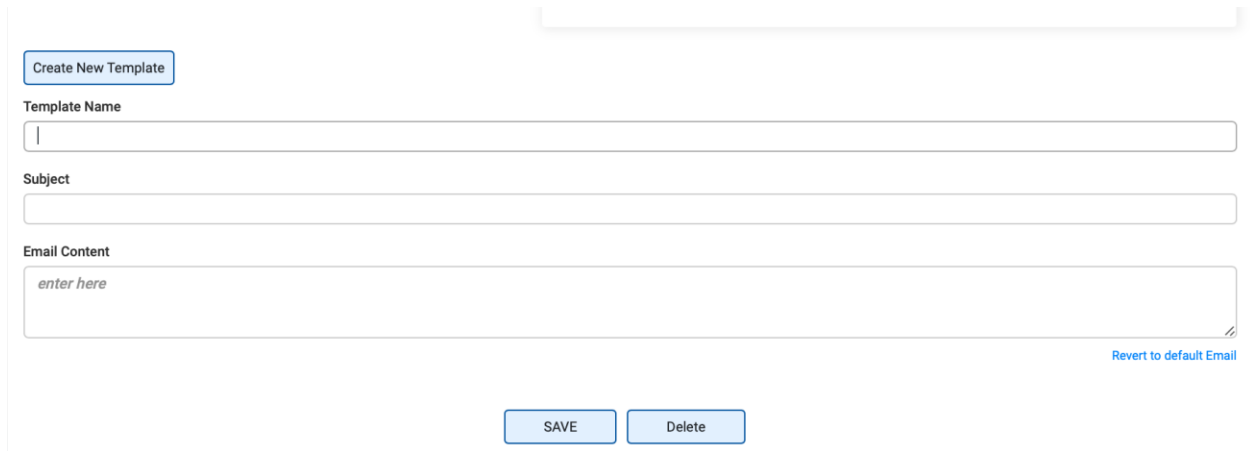
Average

Great

Outstanding

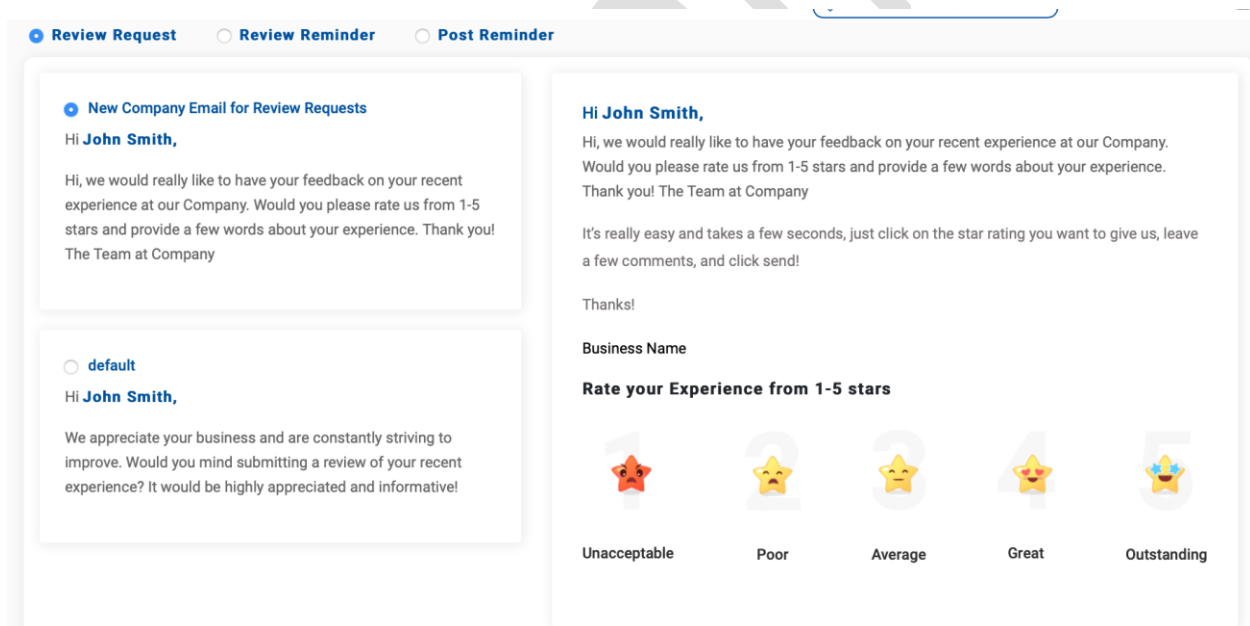
Read the default response carefully. If you feel it is good, retain the default response and that will grab your company name and logo and will send out the message just as it is written in the sample above.

If you want to change your wording and customize it, simply click on Create New Template below the default section and enter your preferred text and select SAVE button.



The screenshot shows a form titled 'Create New Template'. It includes a 'Template Name' text field, a 'Subject' text field, and a larger 'Email Content' text area with the placeholder text 'enter here'. A 'Revert to default Email' link is located at the bottom right of the content area. At the bottom of the form are two buttons: 'SAVE' and 'Delete'.

Now, your new Review Request content will be received by your customers whenever they are emailed a new Review Request.



The screenshot displays the 'Review Request' configuration interface. At the top, there are three tabs: 'Review Request' (selected), 'Review Reminder', and 'Post Reminder'. Below the tabs, there are two main sections. The left section contains two template options: 'New Company Email for Review Requests' (selected) and 'default'. The right section shows the preview of the selected template, which includes a greeting 'Hi John Smith,', a request for feedback, a star rating system (1-5 stars), and a 'Business Name' field. The star rating system is labeled 'Rate your Experience from 1-5 stars' and includes five stars with corresponding labels: 'Unacceptable', 'Poor', 'Average', 'Great', and 'Outstanding'.

To change the SMS/Text Message, select SMS from the drop down menu and follow the same procedure.

Business Details
Social Profile
Automated Responses
Location
User
Subscriptions

Setup Review Responses

SMS

☒ Review Request
☐ Review Reminder
☐ Post Reminder

default

Hi **John Smith**,

Hi customerName thank you so much for using buisnessName !
We would love to hear what you have to say about your experience. Would you be so kind as to leave us a review?
Reviews are how we learn and grow as a company. Here's the link:

SMS Message

Hi customerName thank you so much for using buisnessName ! We would love to hear what you have to say about your experience. Would you be so kind as to leave us a review? Reviews are how we learn and grow as a company. Here's the link:

If you want to delete an Email or SMS message that you have created, just select it and then click on the Delete button at the bottom of the page.

Note: The default wording cannot be deleted from the system, only the messages created by you can be deleted.

Create New Template

Template Name
New Company Email for Review Requests

Subject
Please Rate Your Experience with Company

Email Content
Hi, we would really like to have your feedback on your recent experience at our Company. Would you please rate us from 1-5 stars and provide a few words about your experience.

[Revert to default Email](#)

SAVE

Delete

Review Reminder

When a customer does not respond to your review request, a reminder is sent out. Up to 3 reminders can be sent, the first one within 24 hours, the second one within 72 hours, and the third one within 120 hours. These are the system default reminders and are set up in three time intervals as mentioned. The default reminders are industry standard and are set up not to be intrusive to your customers. You can turn OFF reminders, if you do not want to send the reminders at all.

Note: No reminders are sent if they respond to the review. Reminders stop as soon as the customer provides the review.

The Review Reminder system works just like the Review Requests, you may change the default wording by creating your own, for both Emails and SMS/Texts.

Default content is shown below, and you can change it by going to the Create New Template section at the bottom of the page.

Setup Review Responses

Email

☐ Review Request ☒ Review Reminder ☐ Post Reminder

default

Hi **John Smith**,

We recently sent you a review request on your experience at businessName. Experiences with businessName should be pleasant and we are curious as to your feedback. It's really easy and takes a few seconds. Please click on this link to start:

Hi **John Smith**,

We recently sent you a review request on your experience at businessName. Experiences with businessName should be pleasant and we are curious as to your feedback. It's really easy and takes a few seconds. Please click on this link to start:

It's really easy and takes a few seconds, just click on the star rating you want to give us, leave a few comments, and click send!

Thanks!

Business Name

Rate your Experience from 1-5 stars

1

2

3

4

5

Unacceptable Poor Average Great Outstanding

Set Reminder

☒ (24 hours, 72 hours, and 120 hours after initial request) ☐ OFF

Info: Reminders stop sending after 3 attempts, or after they complete the review

Create New Template

Template Name

Subject

Email Content

enter here

Location

Your location will be saved from your sign-up process. Your business name, address, phone, and industry are all auto recorded. If any of these change, you can edit the information and click on SAVE to change the data.

Manage Location ADD NEW

Business Name Copper Mines, Inc	Domain Name	Mobile Number (760) 301-5260	Industry Type Legal & Tax
Street Address 111 N. Market Street		Street Address 2 100	
City San Jose	State CA	Country Country	Zip code 95110
Review Goal 0			

SAVE DELETE

Adding a New Location

You can add a new location at any time. If you have a business with multiple locations, each location has its own ReviewKeep system with separate data. This way you can track each location separately and also most locations have separate review pages on sites like Google, Yelp, and Facebook based on the physical address.

Business Details Social Profile Automated Responses **Location** User Subscriptions

Manage Location ADD NEW

Business Name	Domain Name	Mobile Number	Industry Type
---------------	-------------	---------------	---------------

To create a new location, click on ADD NEW button. This will bring up a new location entry box for you to fill out all your information. Certain information like Business Name, domain, and Industry Type are brought forward from your initial sign-up.

Fill out the contact information of the new location and click on SAVE. You will then be asked to confirm the new charge for your additional location. You can now select your new location on the drop down box and each location will have its own data, including its own set of customers, its own reviews, etc.

To delete a location, select the location in the Setup → Location section drop down box. Once the correct location is selected, click on DELETE at the bottom of the page. Once deleted or if the current subscription gets expired, it will no longer be accessible.

Street Address		Street Address 2	
<input type="text" value="111 Main Street"/>		<input type="text" value="100"/>	
City	State	Country	Zip code
<input type="text" value="Main City"/>	<input type="text" value="CA"/>	<input type="text" value="USA"/>	<input type="text" value="00000"/>
Review Goal			
<input type="text" value="0"/>			
<div>SAVEDELETE</div>			

Users

Users can be added or deleted in this section. You can also assign Customer Reps in this section for handling customers that sent poor star rating reviews (1-3 star reviews).

To manage a current user, select the user from the drop down menu.

Manage user

Edit User:

Select User

Once selected, all the user information is populated in the sections for name and contact information as well as user type. You can change all sections as well as add them as a customer rep (customer service responsibilities will now be assigned to them) and also give them access to other company locations. A photo can be uploaded in the user profile box so their picture is shown instead of the default icon next to the user name on the upper right hand side of the application.

John Doe



User Types

User types are Admin and User. Admins have access to the entire application, including setup company information, and subscription editing. Users will only have access to the application itself, not setup, company information, or subscription editing.


To delete a User, select the user from the drop down box and click on DELETE. A warning message will appear to ensure you want to delete the user. If you select Yes, that user and all their information will be deleted from the system.

Subscriptions

The current subscription plan shows in the Subscription section, along with its current level, annual or monthly, expiration data, status, and ability to edit or cancel.

Change Your Subscription Plan

Subscription History

DATE/TIME	SUBSCRIPTION	SUBSCRIPTION PERIOD	EXPIRATION DATE	STATUS	ACTION
11/04/2022, 05:10:24 PM	GOLD	Monthly	12/04/2022, 04:10:24 PM	Active	

Monthly Plan

Annual Plan **save 15%**

If you want to cancel, click on the X icon under Action. This will bring up a confirmation of your cancelation and you will no longer be charged after the current subscription period ends.

Change from Annual to Monthly or Monthly to Annual. Annual subscriptions give 15% discount off the subscription level pricing. If you are on Monthly and want to change to Annual, select the Annual Plan and you can select the same plan, or change to another plan to receive the 15% discount starting on the next subscription period.

Monthly Plan

Annual Plan **save 15%**

If you are on the Annual and want to continue on a monthly basis, you can also select the monthly and after the current annual period is over, you will then be on a month to month basis.

Changing Subscription Levels

To upgrade or downgrade in the subscription level, just select Monthly or Annual for the period type, then select the new plan you wish to subscribe to by clicking on one of the “Change to Plan” icons. A warning message will pop-up asking you to confirm the plan change, then the new pricing will take effect at the next subscription period start date.
