

GOBOOSTIFY – SENDING REVIEW REQUESTS GUIDELINE

Ways to send Review Requests

There are three ways to send review requests from within the CRM:

Quick Actions - This is a *Manual* action by the user

Workflow Action - This is an Automated action that sends a review request from within a workflow. If the contact has an assigned user the review request will come from the assigned user.

Reputation Tab - This is a *Manual* action by the user

1. Quick Actions: (Manual)

Quick Actions are shortcuts available in the top left above the sidebar which allows you to perform a set of actions with a few clicks. One of those actions is Sending a review Request:

The screenshot displays the CRM interface for a contact named Adam Levine. On the left, a sidebar contains a 'Launchpad' section with icons for Dashboard, Conversations, Calendars, Contacts (highlighted), Opportunities, Payments, Marketing, Automation, Sites, and Reputation. The main area is divided into two panes. The left pane shows the contact's details under the 'Contact' tab, with fields for First Name (Adam), Last Name (Levine), Email Address (adamlevine@gmail.com), Phone number ((234) 567-8902), and Date of Birth (Date of birth). The right pane shows the 'Activity' tab with a 'Conversation began' message and a 'No Activity for this contact' message. At the bottom of the right pane, there are buttons for 'Send SMS' and 'Send Email'.

Please Note:

When sending a review request, the person who is signed in will be the one listed as the sender of that message.

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Send Review Request

Customize Review Email

Email Sent to the User

Subject

Your Feedback Means A Lot

Heading

Thank you for your business!

Message

Would you be so kind as to recommend us?

Positive Answer

Yes

When to send Email after check-in?

Immediately

Until clicked, repeat this every

Don't Repeat

Save



5 ★★★★★

Thank you for your business!

Would you be so kind as to recommend us?

Yes

Sincerely,
Kate C

Mobile

Tablet

Laptop

If you are looking to send a review request from the contact's assigned user, please use the Workflows action "Send Review Request" to send a request on behalf of the assigned user

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2. Workflow Action: (Automated)

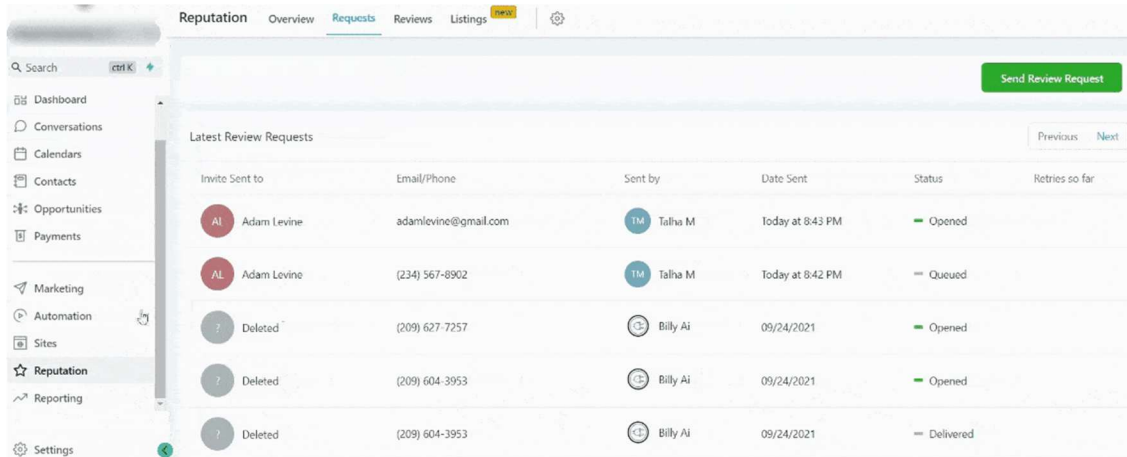
To automate the review request process within a workflow please add the "**Send Review Request**" action > Select the channel **Email/ SMS**

The screenshot displays the 'New Workflow' editor for ID 1661271720497. The interface includes tabs for 'Actions', 'Settings', 'History', and 'Status'. The main workspace shows a workflow diagram starting with a 'Pipeline Stage Changed' trigger, followed by an 'Add New Workflow Trigger' box, and then a 'Please select action' prompt. Below this, a 'Manual Call' action is visible, marked as 'Manual'. A plus sign icon indicates where to add a new action. On the right, the 'Actions' panel is open, showing a search bar with 'rev' and a list of available actions: 'Send Review Request' and 'Membership Revoke Offer'.

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3. Reputations Tab: (Manual)

In the sidebar, you can head to the **Reputation tab > Requests** To send an individual Review Request Manually and to keep a track of all the review requests that are being sent:



Invite Sent to	Email/Phone	Sent by	Date Sent	Status	Retries so far
AL Adam Levine	adamlevine@gmail.com	TM Talha M	Today at 8:43 PM	Opened	
AL Adam Levine	(234) 567-8902	TM Talha M	Today at 8:42 PM	Queued	
? Deleted	(209) 627-7257	CS Billy Ai	09/24/2021	Opened	
? Deleted	(209) 604-3953	CS Billy Ai	09/24/2021	Opened	
? Deleted	(209) 604-3953	CS Billy Ai	09/24/2021	Delivered	

What do the different review request statuses mean?

Queued: When the user creates a review request, the system will attempt to send the request immediately. If there is a queue of other review requests in front of your request, there may be a slight delay before the request goes out.

Another possible reason is that the email/SMS request is set up to send after one day:

- **Sent:** The system has sent the review request.
- **Delivered:** After the system has sent the review request, only Twilio confirms the delivery of the SMS sent. Mailgun will not provide a delivered status.
- **Failed:** When a review request fails to deliver. This can happen for a variety of reasons such as the phone number not being valid.

If you are using another SMTP integration, please make sure to send the review request by logging in with the user email that matches the SMTP integrated email. The system will use the user login email as the sender's email when sending review request emails.

