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Reviews are important

Reviews have become vital to securing new business and remaining a leader in your area. We're excited to announce the latest feature in Utopia to allow you to get more positive reviews - **Review Requests**. With this feature you can quickly and easily request reviews from your clients and adopt it as part of your post-sale process leading to more reviews and more business!

Read on for instructions on how you can start sending review requests in Utopia today.

How to send a Utopia review request

You can request a client review in two ways:

1. Contact header menu

From the main Contact module menu, click 'Reviews' (A) then 'Request Review' (B).

2. Inside contact record

When editing a contact, you can request a review from that contact by clicking on the 'Actions' dropdown menu (A) then 'Request Review' (B).

Setting Up Review Links

When sending a review request, you're required to select which *Reviews URL* to include in the request. You can set a default office reviews URL in account settings (i.e. a link to your office's Google Business page) as well as setting reviews URLs for individual agents (perhaps a link to an agent's Rate My Agent page).

Setting office Reviews URL

To set your office Reviews URL, click the **Settings icon** in the sidebar **(1)** then click **Account Settings (2)**. Set your reviews URL in the **Reviews URL** field **(3)** then click **Save** at the bottom of the page.

Setting staff/agent reviews URLs

To set reviews URLs for individual staff members/agents, click the **Settings icon** in the sidebar **(1)**, click **Account Settings (2)**, click **Staff List (3)**, then click the name of the agent you wish to set the URL for **(4)**.

On the following page, click the **Social** tab **(5)** and paste the agents review link in the **Reviews URL** field **(6)**, then click **Save** at the bottom of the page.

Setting Default Messages

When you send a review request either by SMS or Email, a default message will be displayed for you to make any changes to prior to sending the request. We recommend editing the messages for each request to include a personal touch or reference to the dealings you've had with the client to improve the chances they will actually leave a review, but these messages are intended to be good standard 'defaults' to start from.

There are default SMS and Email messages for each review type (Vendor, Seller, Rental Provider and Renter). To view or edit these message templates, click the **Settings icon** from the sidebar **(1)**, click **Message Templates (2)**, then click **Review Requests (3)**. From here you can view and edit the messages for each review type **(4)**.

SMS

For each SMS message template there is a window for you to enter your default message **(1)** as well as an 'Insert' field for you enter in any special merge fields that will be automatically replaced with the necessary information prior to the message being sent (i.e. Contact first name, agent first name, agent mobile etc.).

Email

For each Email template there are three fields to complete: the email subject line, email message and email (closing text after button) message:

The two message fields correspond to the text before and after the review link button in the email:

Make any changes you'd like to these messages for any review types you plan on sending (Vendor, seller etc.) then click **Save** at the bottom of the page.

Requesting Review

Begin by clicking the request review link in either of the manners shown above, either from the header menu or from inside a contact.

On the following screen you'll need to select the review type (1) - Vendor, Buyer, Rental Provider or Renter and the send method (2) - Email or SMS. If you've selected Email, you'll also need to select an email template (3). When done, click **Next**.

The following screen will differ based on how you initiated the review request and whether you selected SMS or Email as the method. If you click the Request Review link from the main header menu, you'll need to enter and search for the contact (or group of contacts) you'd like to send the review request to (4). If you clicked Request Review from within a contact record, this contact will be preselected.

Select a time to send the request (5), select which reviews URL should be included (6) and select who the request should come from (7). The subject and message fields displayed (8) will depend on whether you selected Email or SMS. At the bottom of the page are buttons to Preview the request or Send the request when ready (9).

Once you click 'Send Request' in the previous step you'll be taken to a page where you'll be able to see all of your review requests. Via the options beside each request (10) you can view a report of the mailout, view the message that was sent or cancel the request if it hasn't yet been sent.

You can access the above list of review requests via the 'Reviews' dropdown menu item in the Contacts header menu:

For non-Utopia members

For those who do not use Utopia, please refer to the below eBook for advice and email templates on Google Reviews.

Google Reviews eBook