Review Generation in Fish 3 - How to Guide

Goal:

To provide an automated feature in Fish3 that will send out requests (via email) to commercial and residential customers asking that they provide internal customer feedback (via your survey form on your FISH website) and public reviews on Google and Facebook (with an option to add two others).

Overview:

When a work order is checked in, FISH3 will generate the appropriate email based on the user configuration in Utilities/Feedback Email Options (see below) to both Commercial and Residential customers. The commercial and residential email formats are different as shown later in this document. The email will be sent to the **Location Contact** email address(es). **If no email address(es) are present, no email will be generated.**

You have been set up with a new email address. This is the address recipients will see in the "From" field of their automated email from FISH3. Additionally, this account will receive all bounce-back (non-delivery) notices so that you can edit the email addresses on file for a customer's location if they are outdated or contain typos. It will also receive replies if the customer chooses to reply instead of click any of the links to the survey and review sites. Your email account is reviewsXXXX@fishwindowcleaning.com and your password is "drfwcXXXX". Instructions for installing your email in Outlook are provided at the end of this email.

How It Works:

Feedback Email Options:

This option is available under Utilities in the main navigation (blue) bar in FISH 3. On this screen, users can select or de-select Google and Facebook. This applies to all new and existing customers, and the default is that both are checked. The URLs are not editable. They are specific to your location and provided by the Branding and Marketing team. You can also add up to two additional review sites. Simply enter a name for the additional review site, i.e., "Angie's List", and the specific URL that goes to your landing page on that review site. Then click "Save".

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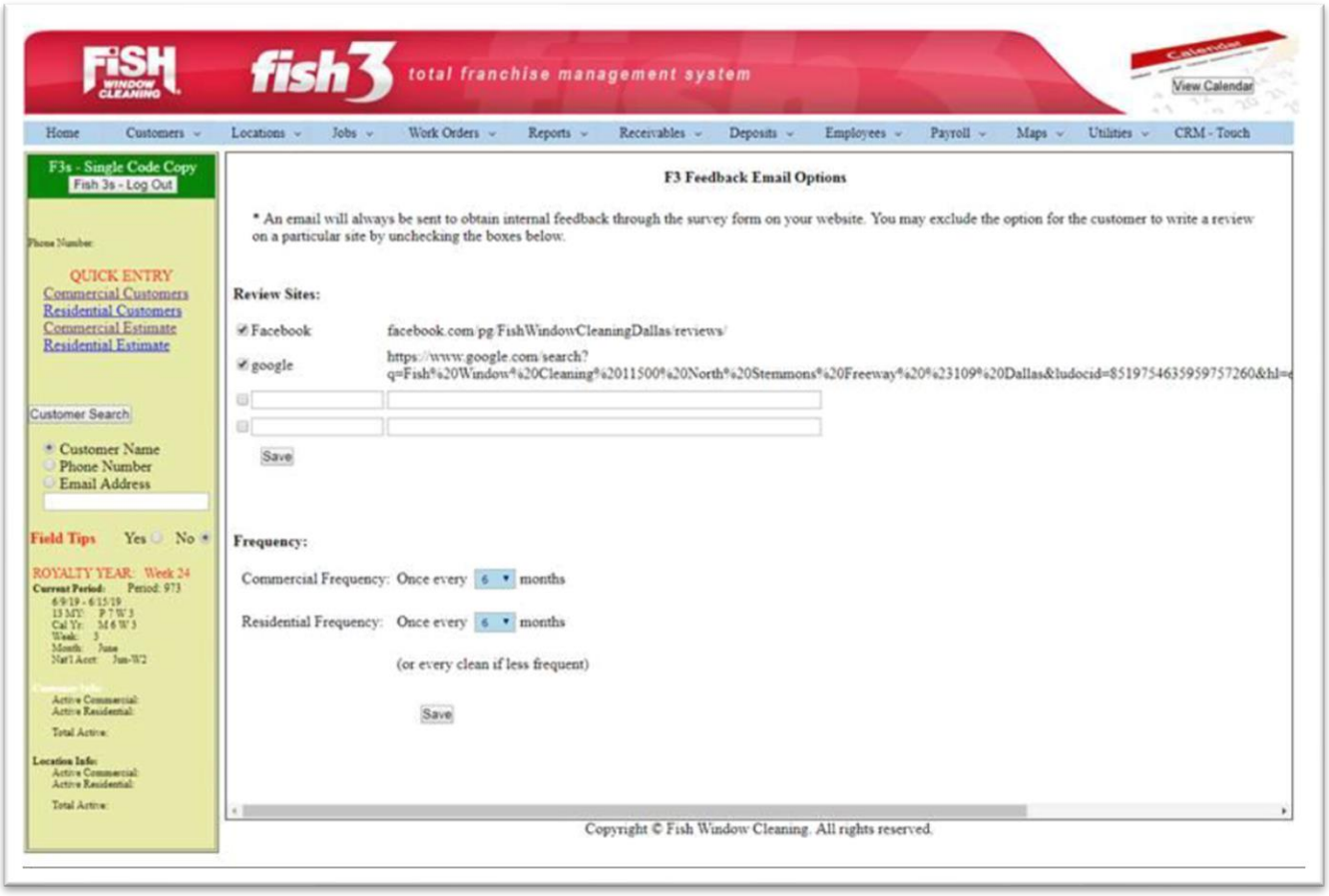
You can also set the frequency for how often a customer will receive an email requesting them to fill out a survey and/or provide a review. Frequency will default to 6 months but can be set anywhere from 1-12 months. A checked in work order will trigger the initial email to go out. If the frequency is set at 6 months, a second email will be sent when a work order is checked in after the 6-month mark. For example: If the first work order is checked on July 2, an initial email goes out. On January 2nd (6 months after 1st check in with review tool), the next work order checked in for this customer will trigger the second email to go out.



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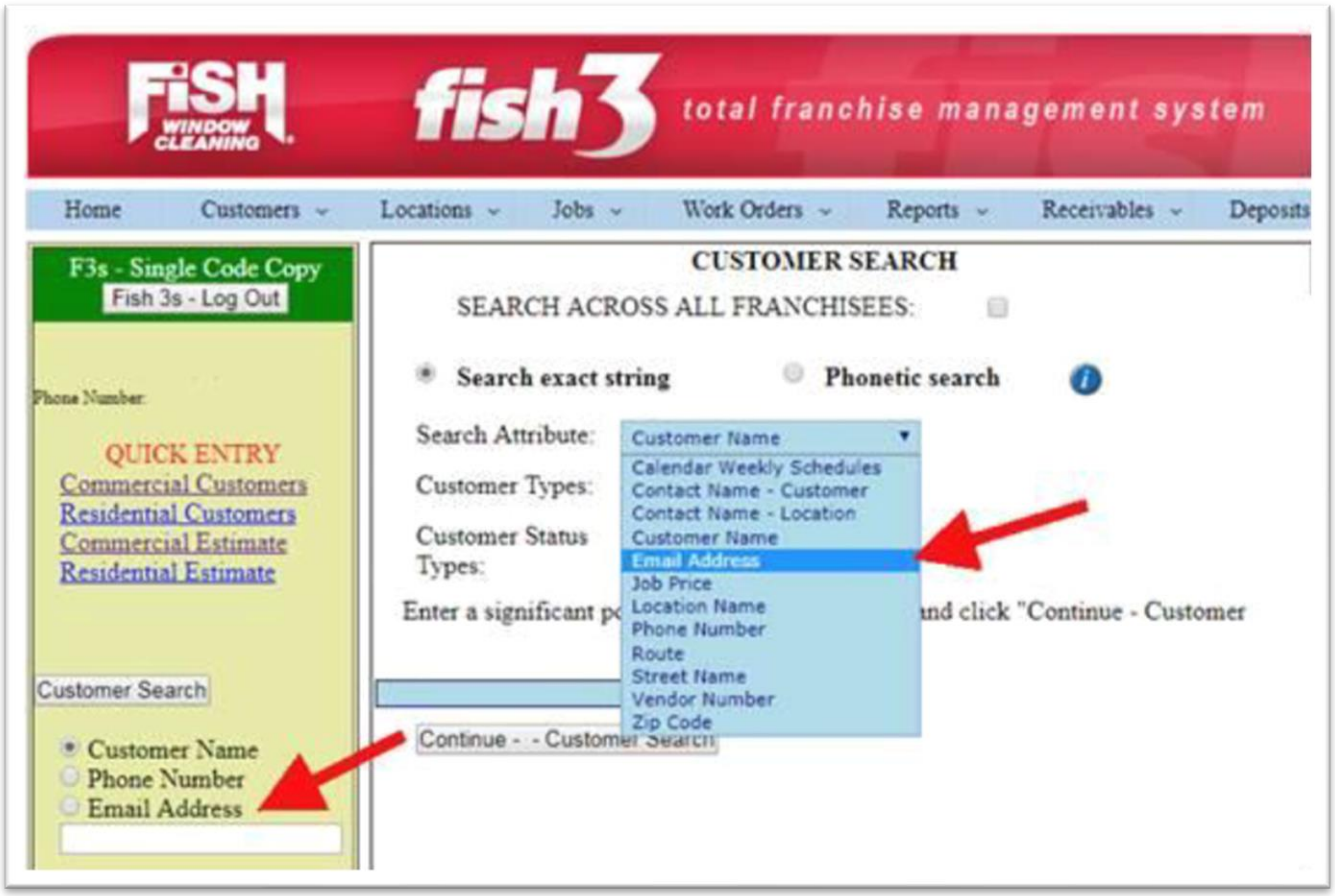
Customer Search by Email Address:

An “Email Address” attribute has been added to both the quick search feature on the left as well as the “Customer Search” option from the blue menu bar under “Customers”. This becomes particularly handy when you get responses and/or bounce-backs that have generic (i.e. gmail.com, yahoo.com, etc.) addresses.



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Locations Without Email Report:

A new report has been added that shows all active customer locations that do not have a location contact email addresses on file. Click on “Reports” in the blue menu bar and select “Locations Without Email”. When you click on a customer/location listed in this report, the edit customer screen comes up. From here, click on “Edit Location”, then the Contact tab to enter an email address for this customer/location. NOTE: Changing the email in the Locations tab will not affect the address in the Customer Contact Information tab and will not affect the automated billing emails.

Option to not send review links – per customer – at check in:

Emails containing requests for customers to complete a survey and/or provide a Google and/or Facebook review are automatically sent when a work order is checked in.

At the time of check in, a box will appear next to each work order for “Do Not Send Review Links”. This allows you to exclude the review site links (not the Feedback link) in the email to the customer. When checked, the exclusion of the review site links applies to the customer in general (all jobs, all locations).

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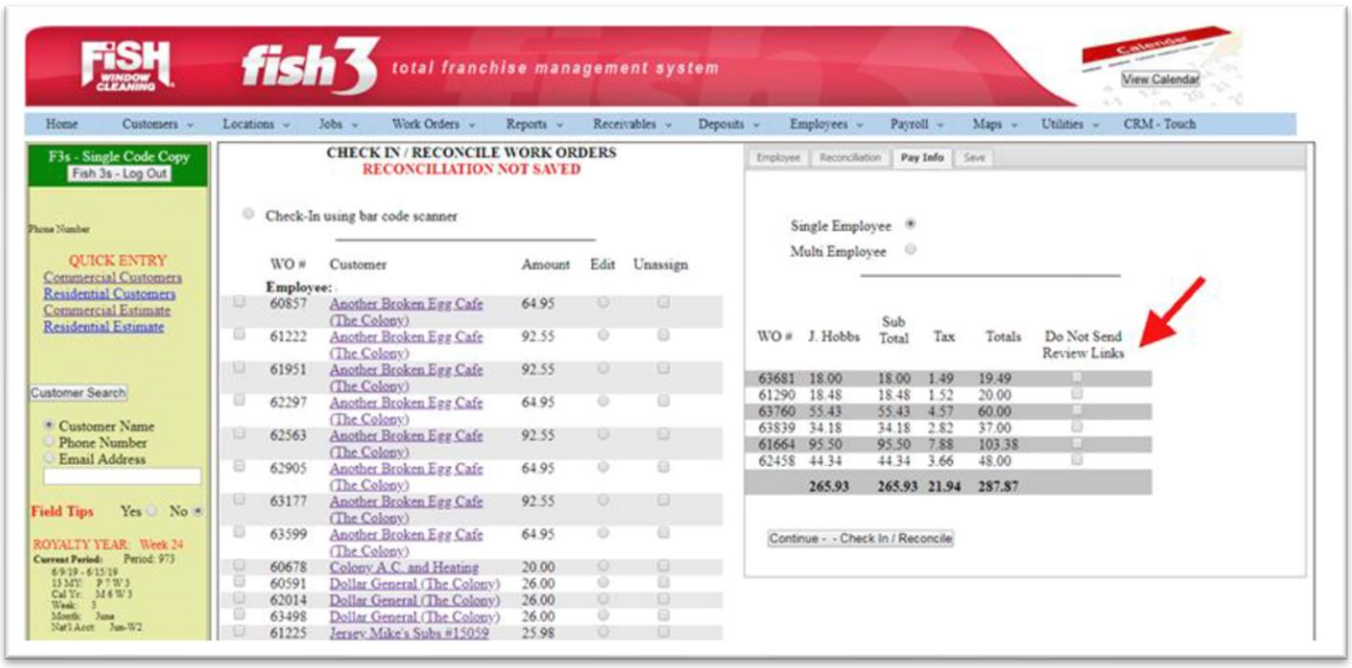

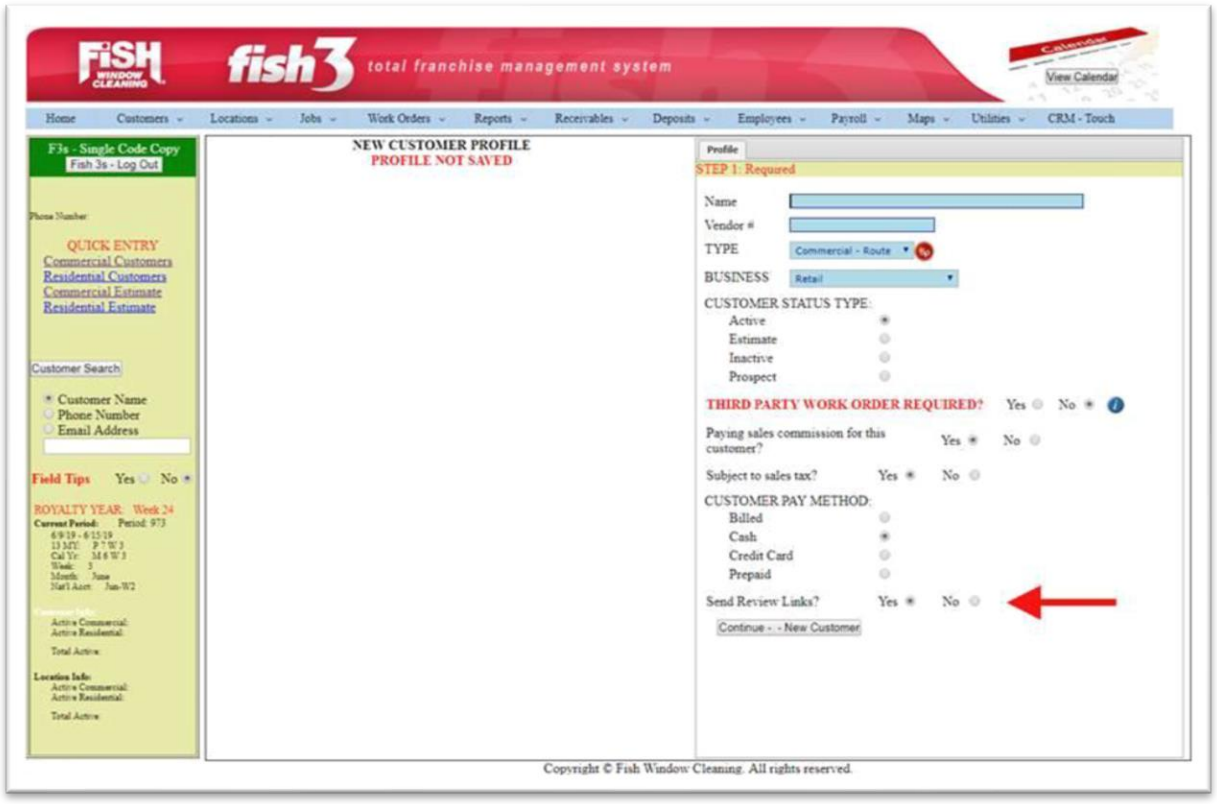

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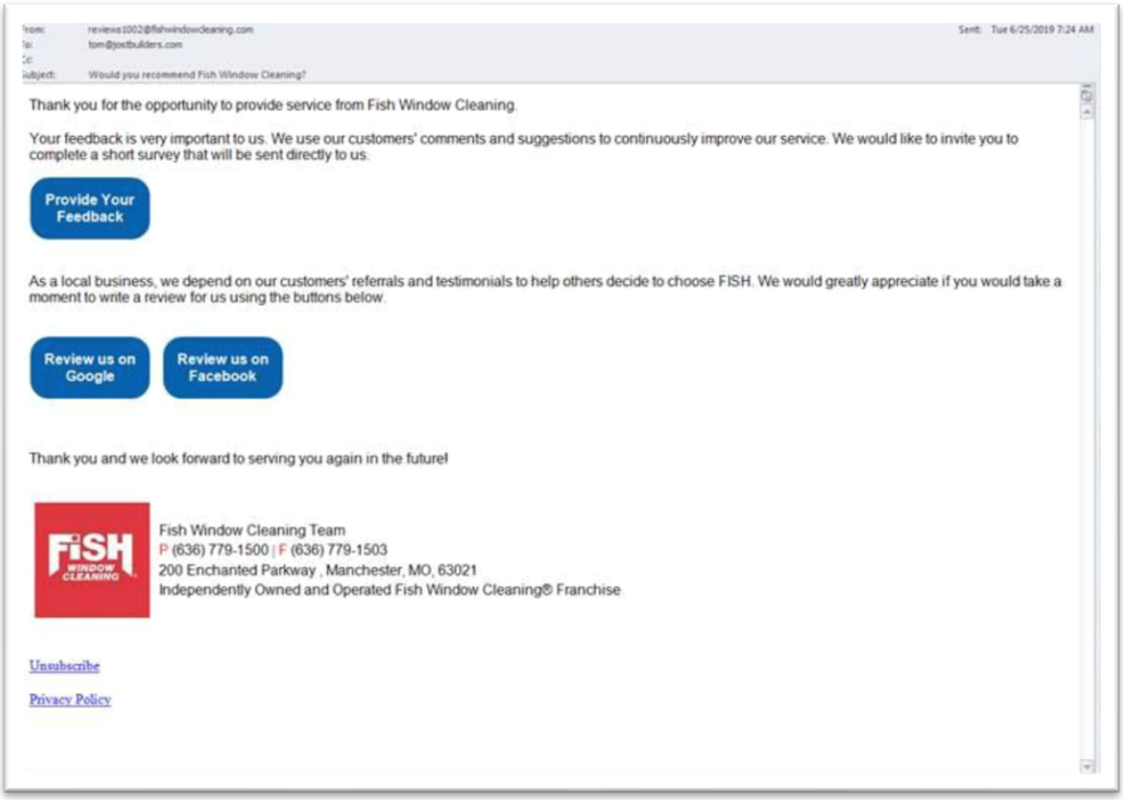
Option to not send review links – Customer Profile tab:
An addition to the Customer Profile Tab (New and Edit Customer, not Quick Entry), is an option for "Send Review Links?". This defaults to "Yes". This allows you to exclude the review site links (not the Feedback link) in the email to the customer. When "No" is selected, the exclusion of the review site links applies to the customer in general (all jobs, all locations). Copyright © Fish Window Cleaning Services, Inc. All rights reserved.

The Review Generation Emails:
The format and wording for emails that go out to your customers vary slightly from Commercial and Residential. Both will contain an Unsubscribe link (that allows them to unsubscribe to these review request emails, but not the automated billing emails) and a Privacy Policy (that links to FISH's Privacy Policy on the public Website). Emails also include a signature with your location's phone number(s) and address. Below are actual emails that were sent to customers from the Home Office.

Commercial (Subject: *Would you recommend Fish Window Cleaning?*):



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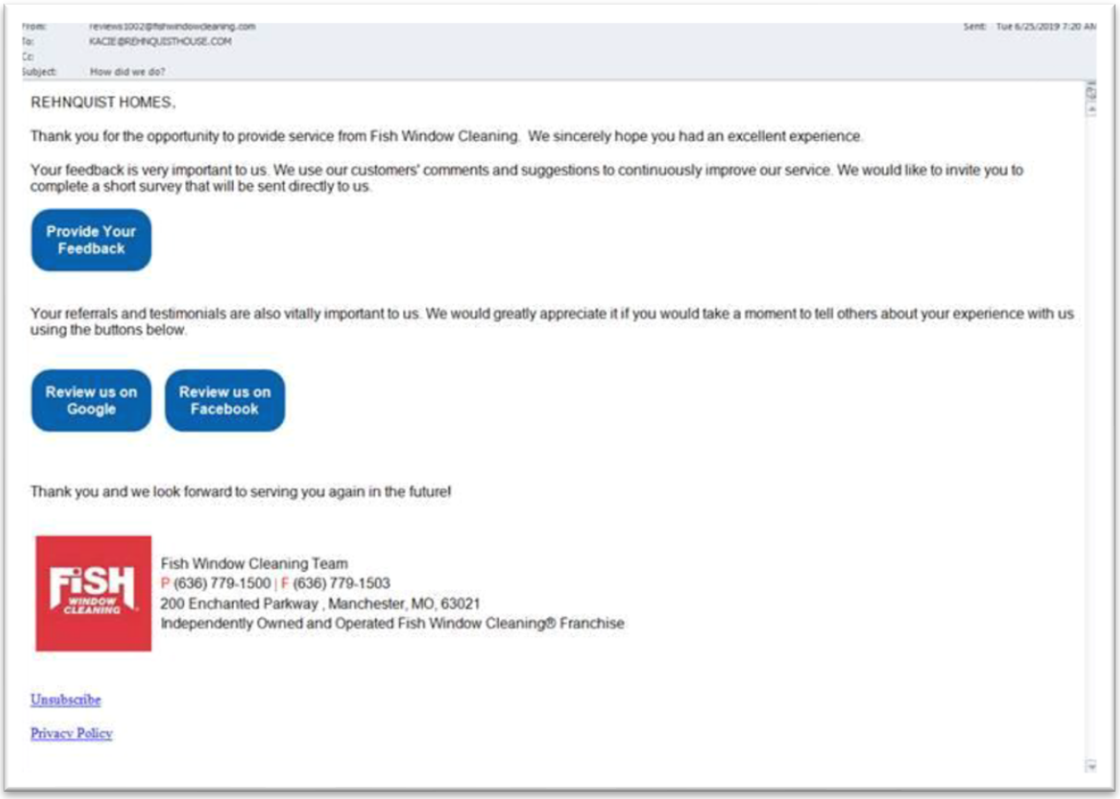
Residential (Subject: *How did we do?*)



To: KACIE@REHNQUISTHOUSE.COM
Cc:
Subject: How did we do?

REHNQUIST HOMES,

Thank you for the opportunity to provide service from Fish Window Cleaning. We sincerely hope you had an excellent experience.

Your feedback is very important to us. We use our customers' comments and suggestions to continuously improve our service. We would like to invite you to complete a short survey that will be sent directly to us.

Provide Your Feedback

Your referrals and testimonials are also vitally important to us. We would greatly appreciate it if you would take a moment to tell others about your experience with us using the buttons below.

Review us on Google | Review us on Facebook

Thank you and we look forward to serving you again in the future!

Fish Window Cleaning Team
P (636) 779-1500 | F (636) 779-1503
200 Enchanted Parkway , Manchester, MO, 63021
Independently Owned and Operated Fish Window Cleaning® Franchise

Unsubscribe

Privacy Policy

A Best Practices document along with details on the Survey form and how you can edit it can be found in the Marketing section of the Fishing Hole.

Please call any Franchise Support Specialist or Technology if you have any questions.

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Email Set Up Instructions:

For the current versions of Outlook (2016, Outlook 360, etc.):

- Add a new account. Enter the address. Choose Advanced, and click enter account manually. Select POP. Enter "mail.fishwindowcleaning.com" for the incoming server, port 110. No SSL.
- Enter "mail.fishwindowcleaning.com" for the outgoing server, port 587. No SSL, security: none.
- Click ok. Enter your pw. If it works, it'll ask if you want to add it to your phone. No need. Then, all should be fine!

Outlook 2010 and 2013+

- Go to the File Tab, click the "Account Settings" box, then the "Account Settings" drop down box.
- Click the "New" button… roughly in the upper left of the screen under the word "Email" (tab header).
- Click Next with "Email Account" selected.
- Click "Manually configure server settings…" at the bottom of the "Add New Account" dialog box.
- Click "Next" with "Internet E-mail" selected.
- Enter your name and email address. **Be sure POP3 is selected.**
- Incoming AND Outgoing servers are: **mail.fishwindowcleaning.com**. Username is that part before the "@" in your email address. It usually sticks that in there for you.
- Enter your password and leave "Remember Password" checked.
- Do not check "Require logon using Secure Password Authentication (SPA).
- We usually uncheck "Test Account Settings by clicking the Next Button".
- Click "More Settings". Click The Outgoing Server Tab. Select "My outgoing servers (SMTP) requires authentication".
- The default will check "Use same settings as my incoming server." That's good.
- Click the **Advanced** Tab. Change "25" for Outgoing server (SMTP) to "587".
- The Delivery section at the bottom should be set up to be:
    - **Leave a copy of messages on the server**
    - **Remove from server after 10 days.**
- Click OK, Click Next, Click Finish, Click Send/Receive All Folders – you should get the test message from me. Reply to that to make sure you can send messages as well as receiving them.

Webmail

Go to webmail.fishwindowcleaning.com. Login with the email address and pw.

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