

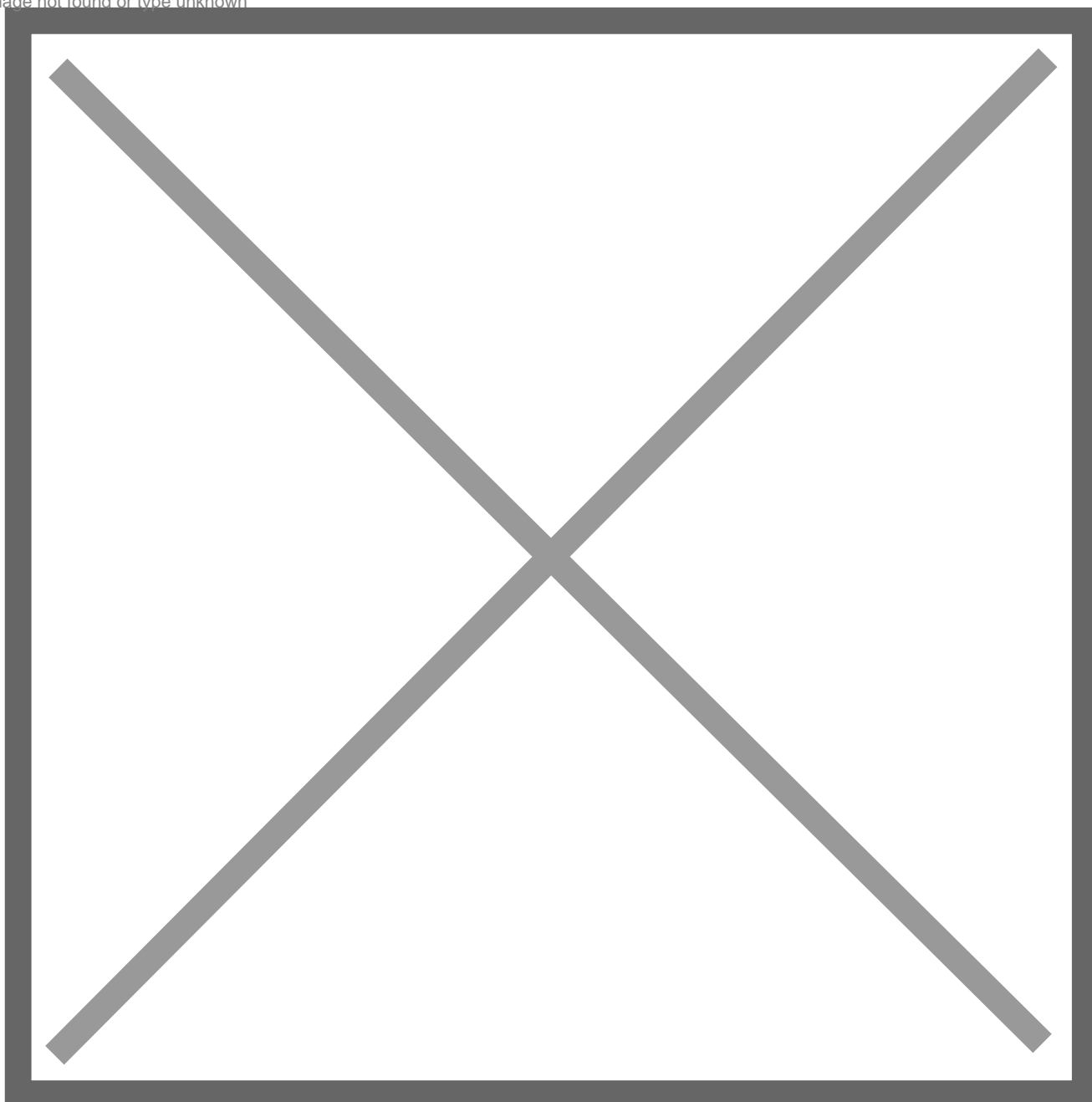
Send review requests in batches to multiple customers at once.

The **Bulk Upload** page allows you to send a review request email or SMS text message to several customers at one or more locations at once. Messages are based on pre-defined templates that are customizable within the platform.

Learn more about review requesting best practices.

Bulk requests are delivered according to the specified email address or phone number, location, and template in each row of the CSV file.

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If SMS Opt-In is enabled for your account, the recipient must first reply **YES** to confirm initial consent to receive text messages from your business. Bulk requests may be subject to United States

telecommunication laws; follow your own corporate messaging guidelines.

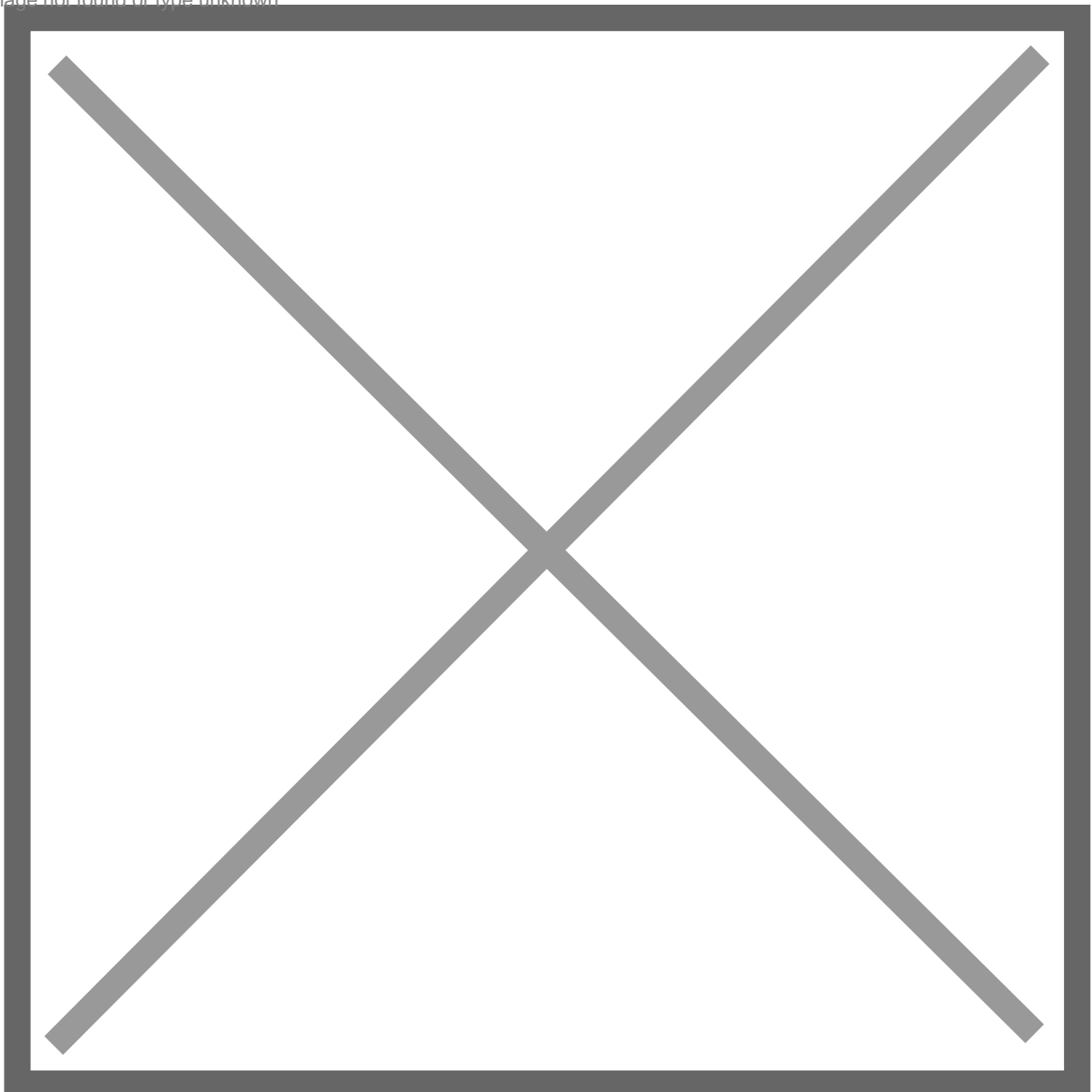
To request an Email or SMS review via bulk upload:

1. From the **Requests** tab, click **Bulk Upload**.
2. On the **Bulk Upload** page, click the **Download a Template** drop-down, and choose a **template** in the list upon which you want the request to be based. (Your selection determines the columns used in the upload spreadsheet. For example, if you choose an email template, some of the columns required for SMS will not be included in the upload template.)

The bulk upload template named -request-reviews.csv downloads to your computer's default download location.

3. Open the downloaded request template. Copy/paste into the cells the following information for each request:
 - **template** – The name of the template to use in the request. Make sure the name entered here is a perfect match to the template's name in the platform; an extra space at the end of the name will cause your upload to fail. Some templates may have follow-up logic assigned.
 - **location-code** – The location code for the location the request is sent on behalf of. To find a location's code, you must have **Admin** permissions. Click **Settings > Locations**. If a code starts with a zero, enter an apostrophe ' before the code in the CSV file (example: '0104); otherwise, the system removes the leading zero.
 - **subject** – Applies to email message types only. The subject line of the email. If your template already has a subject line defined, you may skip this column.
 - **to-email** – Applies to email AND SMS message types. The email address of the recipient. Double-check the formatting to ensure address accuracy.
 - **to-phone** – Applies to SMS message types only. The phone number of the recipient (dashes are allowed but not required). Double-check the formatting to ensure accuracy.
 - **to-name** – Enter the customer's first and last name (for Email). If the template includes a variable for recipient name, and no customer name is entered, the variable will be replaced with a blank space.
 - **from-email** – The From email address used when the email is delivered. Template variables {{location-from-email}} automatically pull in the selected location's name to avoid having to enter this information manually. **This is the address used if the recipient replies to the email.**
 - **from-name** – The From display name used when the email is delivered. Template variables {{location-from-name}} automatically pull in the selected location's name.
 - **customer-name** – Enter the customer's first and last name (for SMS). If the template includes a variable for recipient name, and no customer name is entered, the variable will be replaced with a blank space.

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4. Save the file, preferably with an indicator to distinguish it from other upload requests files (e.g., -request-reviews_Sep2020.csv). Then from the Bulk Upload screen, click **Upload Requests**.
5. In the Upload Requests window, click **Choose File** to locate the file you just saved.
6. Select the **Import with errors** check box if you want to proceed with the request even if some rows have errors. All rows that do not have errors will process, and you can re-upload the request for **ONLY** the rows that did not upload in a second request after fixing the errors. If you leave the **Import with errors** check box cleared, if any rows have errors, none of the request will be processed until all errors are fixed. Regardless of the option chosen, over-survey protection is in place to ensure you do not send duplicate requests within a set number of days.
7. Click **Upload and Send**.

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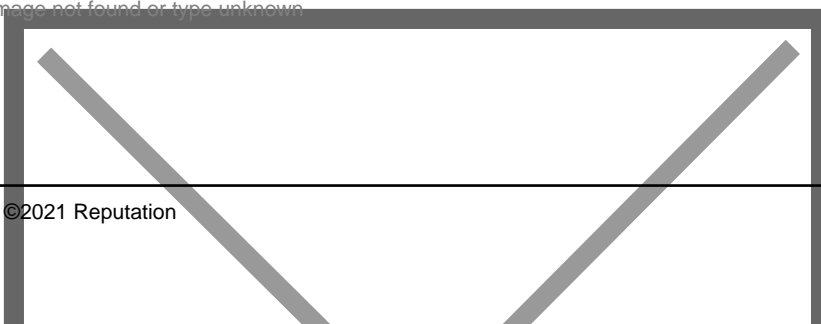
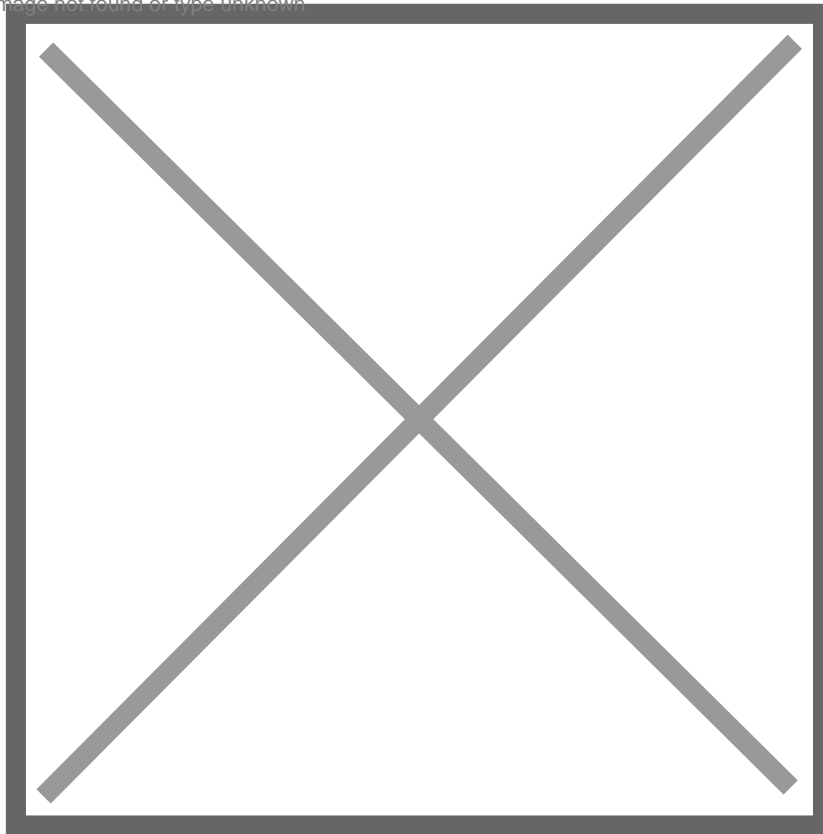


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A message appears to indicate the status of your request. If any requests failed due to address formatting errors, over-survey protection, or a template that does not apply to the selected “to” input, the details of the failure will appear in a message.

You can view a log of the requests from the **Requests > History tab**.