

eKomi



FEEDBACK ENGAGEMENT *User guide*

V2 - 2020

Menu

A. First contact

- Login
- Controls
- Review details
- NPS score and rating
- Automated tasks

B. Engagement

- Engaging
- Customer dialog
- Email templates

C. Review exports

- Configuration types
- CSV setup
- CSV listing
- Bulk export

D. Advanced features

- File transfer
- Comment notification
- Automatic comments
- Automatic dialogs
- Direct review access



A.

First contact

First contact

First contact



eKomi Feedback Engagement
The Feedback company

Welcome to eKomi Feedback Engagement

e Login via eKomi Connect

1

1

Login

You can start by logging in with your usual eKomi Connect credentials. If you encounter any issues, it might be because your user does not have sufficient rights.

If that happens, please get in touch with our support team, they will be able to help you.

support@ekomi.com

If you have more advanced needs in terms of user management, please note that the application can handle fairly advanced feature segmentation based on a variety of user rights.

For example, you can allow certain users in your group to handle dialogs while some others will not have this right.

In general, most of the features are handled on a **user role** basis. If you need any of the features listed in this guide and yet cannot somehow access it, please reach out to our support team.



The screenshot shows the eKomi Feedback Engagement interface. At the top, there's a navigation bar with 'Manage', 'English', 'Account - 116760', '116760', and 'Logout'. Below this is the 'Reviews' section, which includes a summary card with '47 Reviews', '4.0 /5', and '32 NPS'. A rating scale (1-5) is shown with a green bar indicating the current average. There are filters for 'Period' (a date range selector) and 'Search' (a text input). An 'Update reviews' button is highlighted with a pink box labeled '1'. Below the filters is an 'Advanced' dropdown menu. The main content area shows a list of reviews, each with a star rating, NPS score, and a comment. The list is partially expanded, showing details for several reviews. A pink box labeled '2' highlights the 'Advanced' dropdown menu.

1

Update reviews

You can easily refresh your reviews by clicking on the corresponding “Update reviews” button. This will fetch the new reviews and eventually update the existing ones (status change).

1

2

2

Filters

Using filters, you can access your reviews based on a set of simple parameters. You can filter them by rating, time range... or search any content (most likely a transaction ID for example). By unfolding the advanced menu, you can access slightly more specific parameters - listed below.

- **Type:** use it to distinguish your seller and product reviews for example. The market research reviews are the ones collected through the “MRF” forms.
- **Contact:** use it to distinguish the reviews on which you have engaged already, whether via comment or customer dialog.
- **Published:** use it to identify the reviews that have been published for example, meaning they have been through our moderation process and appear on your certificate page if it's activated.
- **Activity:** use it to identify the reviews that have been taken out one way or another, more on this later.
- **Source:** use it to distinguish the reviews that have been collected with a Smart Form or a legacy one. This is only applicable if you have ever used our legacy system.

Tips:

- > **Opened dialogs** will return all dialogs that you have opened (manually or automatically)
- > **Active dialogs** will return all dialogs that have unread messages (coming from the end customers)

Please note that active dialogs are excluded from the opened dialogs filter results to keep things clean and simple. Also, we will mark reviews that contain a new dialog message with a green dot.

Note:

You will see that we load your latest reviews (last month) by default to avoid long processing times but you can change the range by using the filter in the top left.



The screenshot shows the eKomi Feedback Engagement interface. At the top, there's a navigation bar with 'Switch back', 'Manage', 'English', '116760', and 'Logout'. Below that, there's a header for 'Survey' with a user profile and an 'Accepted' status. The main content area shows two survey entries. The first entry, labeled 'S', has a green checkmark and a 'Start dialog' button. It contains a review: 'Perfect! Very smooth process all the way.' Below the review is an 'Add comment' button. The 'Review details' section lists several questions and answers: 'Q: How would you rate your experience with us? A: 4', 'Q: Information and availability A: 4', 'Q: Check-out process A: 3', 'Q: Customer support A: 4', 'Q: Your personal feedback: A: Perfect! Very smooth process all the way.', and 'Q: How likely are you to recommend us to your friends and colleagues? A: 9'. The second entry, labeled 'P', has a grey checkmark and a 'Start dialog' button. It contains a review: 'It fits the laptop perfectly! Exactly how described.' Below the review is an 'Add comment' button. The 'Review details' section lists: 'Q: How would you rate your experience with us? A: 4', 'Q: Information and availability A: 4', 'Q: Check-out process A: 3', 'Q: Customer support A: 4', 'Q: Your personal feedback: A: Perfect! Very smooth process all the way.', and 'Q: How likely are you to recommend us to your friends and colleagues? A: 9'. Three red dashed boxes with numbers 1, 2, and 3 are overlaid on the right side of the screenshot, pointing to the survey header, the review overview, and the review details respectively.

1 Survey

Your reviews will be listed in a meaningful way, organised as foldable surveys. In this context, a survey is simply a bundle of all the reviews left by a customer for a given “*transaction*”.

You can unfold each survey in the list and consult the individual reviews it contains.

2 Review overview

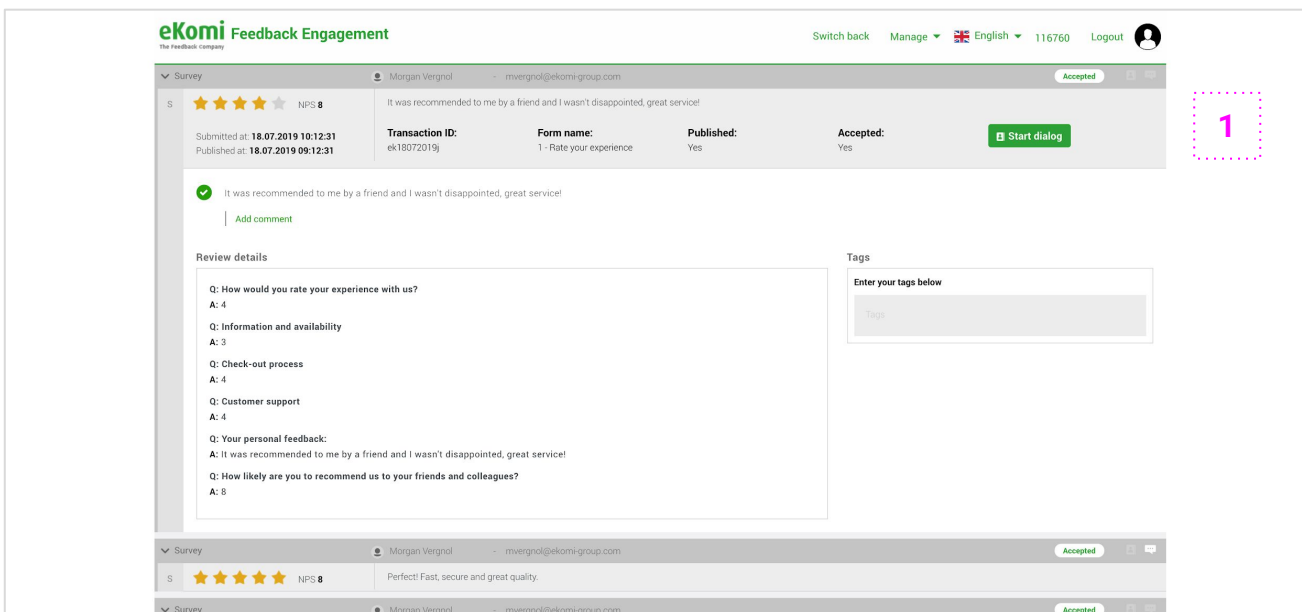
Each review’s header contains the main information you need to know. In a small space, you will be able to instantly identify the current status of the review and eventually start a customer dialog.

Please note that the written review displayed here is the **exact** version left by the customer - untouched by our moderation team.

3 Review details

Below the header, you will see more details about the review. This is where you will be able to read the answers to all the questions that were contained in the form, but also leave a comment on the review.

Please note that the written review displayed here is the **moderated** version - marked by a green check.



1 Review details

As mentioned above, we organised the information about each review in a way that will allow you to get a quick overview while browsing through them.

However, when digging deeper, you will need to know what each field means. For that matter, here is a brief overview of the different sections of the interface.

- **S / P / M:** shows the review type, can be either **S**eller, **P**roduct or **M**arket research.
- **Submitted at:** time at which the review was left by the customer.
- **Published at:** time at which it was published (moderated) by eKomi.
- **Published:** shows the current status of the review, unmoderated or published.
- **Accepted:** shows that this review was accepted by you. All reviews are accepted by default.
- **Anonymous:** you will see that instead of the email address if it is unavailable.

Note: if the email address is unavailable, you will not be able to open a dialog for this review as the customer cannot be reached.

It is however possible to **anonymise** the reviews on your end - if you want to hide customer data to your agents for example - while keeping the dialog feature intact if the address is available. This feature needs to be enabled by a support agent.



The screenshot shows the 'Reviews' section of the eKomi Feedback Engagement dashboard. On the left, a summary card displays '1 of 46 Reviews', an average rating of '4.1 / 5', and '33 NPS'. A donut chart below this shows the NPS distribution: 45% Green (Promoters), 42% Yellow (Passives), and 12% Red (Detractors). The overall NPS score is '33'. The main panel contains various filters: Rating (1-5 scale), Period (Select range), Search, NPS (All 0-10), Type (Seller, Product, Market research), Contact (Commented, On-going dialogs, Closed dialogs), Published (Yes/No), Activity (Show deleted, Show withdrawn, Show rejected reviews), and Source (Show SFF, Show legacy reviews). A 'Simple' button is at the bottom right of the filter panel. Below the filters, a survey snippet is visible with a 5-star rating and an NPS score of 8.

1

1 NPS score

Unfolding the filter will also allow you to see the overall NPS score if available.

As you can see on this example, we display both the individual NPS rating (next to the 5-star rating) on each review and the overall NPS score.

The overall NPS score is calculated in a standard way ($\%Promoters - \%Detractors$). The segmentation of each group is labelled as follow:

- **Green:** promoters (9 - 10)
- **Yellow:** passives (7 - 8)
- **Red:** detractors (0 > 6)

2 Fetch NPS ratings

If you have a NPS (ranking scale) question in your Smart Form and you want to display the ratings/score as shown in the example above, you have to make sure the question is correctly **tagged** in the Smart Feedback Forms app.

To do so, open your form in the **Smart Forms** editor, click on the "Tags" button in the top left, and add the tag to the question that should be fetched as your NPS reference question.

The tag has to be exactly "NPS" like shown here.

The screenshot shows the 'Smart Feedback Form' editor interface. A 'Tags' modal window is open, displaying a list of questions from the form. The question 'How likely are you to recommend us to your friends and colleagues?' is selected, and the tag 'NPS' is being applied to it. The modal has 'Save' and 'Cancel' buttons at the bottom. The background shows the form editor with various question types like 'Rate your experience', 'Short text', 'Long text', etc.

2



Automated tasks

Current server time 12:35:16

Name	Type	Occurrence (UTC)	Last execution	Enabled	Actions
Import reviews (PM)	feimporter	Daily - 18:00	23.07.2019 18:00:22	YES	History Edit Delete
Import reviews (NOON)	feimporter	Daily - 12:00	24.07.2019 12:00:20	YES	History Edit Delete
Import review (AM)	feimporter	Daily - 06:00	24.07.2019 06:00:40	YES	History Edit Delete

1 Automated tasks

As discussed before, you can refresh your reviews by simply hitting the “Update reviews” button. However, this is not ideal.

To cover most tasks that you would want to happen on a regular basis, we support various “automated tasks”. Also called “cron jobs”, they simply allow you to run a specific action on a specific time. For that matter, here is a brief overview of the different tasks we support.

- **Review import (legacy):** this will allow you to regularly fetch reviews that were collected with our legacy (pre-Smart Forms) system. This case is quite rare and will eventually be removed as it was primarily added to support legacy implementations. If you are using Smart Forms, you can ignore this.
- **Review import (SFF):** this is most probably the case that you will need and use, it will allow you to fetch your Smart Forms reviews.
- **CSV Generation:** similarly, this task is quite important as it will allow you to regularly generate CSV files based on certain predefined configurations. More on this later.

Each task can be set up daily at a specific time (UTC standard time). You will see that CSV Generation tasks can also be set up on larger occurrences if need be.

Note: you will also notice that we installed 3 “Review import (SFF)” tasks on your account, those will make sure that your Smart Form reviews get automatically refreshed 3 times a days.

Edit Job

Current server time 12:36:02

Name * Import review (AM)

Type * Review Import - SFF

Time * 06:00

UTC standard time Will run today at 06:00

Enabled

Save changes Delete Back to listing



B.

Engagement

Engagement

Engagement

Let's take a minute to...

Distinguish comments from customer dialogs

Comments

Comments are **public**, it's a good way for you to manage your reputation by engaging publicly.

A few things to note:

- Both seller and product reviews can be commented.
- Seller review comments appear on your certificate page (if active), they can also be retrieved via API. [[Documentation](#)]
- Product review comments are not publicly displayed by eKomi but can be retrieved via API too. [[Documentation](#)]

Customer dialogs

Dialog are **private**, it's a good way for you to solve conflicts with your customers or communicate directly.

A few things to note:

- Dialogs can be started for both seller and product reviews.
- When starting a dialog, the customer will be notified by email.
- At any time, the customer is free to ignore the dialog or engage with you. He/she will also be able to withdraw his/her review and leave a new one if need be.



The screenshot displays the eKomi Feedback Engagement dashboard. At the top, there's a navigation bar with 'Switch back', 'Manage', 'English', '116760', and 'Logout'. Below this, a survey header shows 'Submitted at: 18.07.2019 10:11:35', 'Published at: 18.07.2019 09:11:35', 'Transaction ID: ek18072019h', 'Form name: 1 - Rate your experience', 'Published: Yes', and 'Accepted: Yes'. A green 'Start dialog' button is visible. The main content area shows a review with a green checkmark and the text 'Perfect! Fast, secure and great quality.' Below the review, there's a 'Review details' section with several questions and answers, and a 'Tags' section with a text input field. Three red dashed boxes with numbers 1, 2, and 3 are overlaid on the interface: box 1 points to the 'Start dialog' button, box 2 points to the 'Edit | Delete' buttons, and box 3 points to the 'Tags' input field.

1 Customer dialog

You can start (or access, if already started) a customer dialog by clicking on the corresponding button.

When a dialog is open (or in progress) the corresponding pictogram will become **white** - showing you that it's currently active.

2 Comment

Alternatively, you can leave a comment on the review. Commenting a review is as easy as leaving a short message under the moderated version of the written feedback left by your customer.

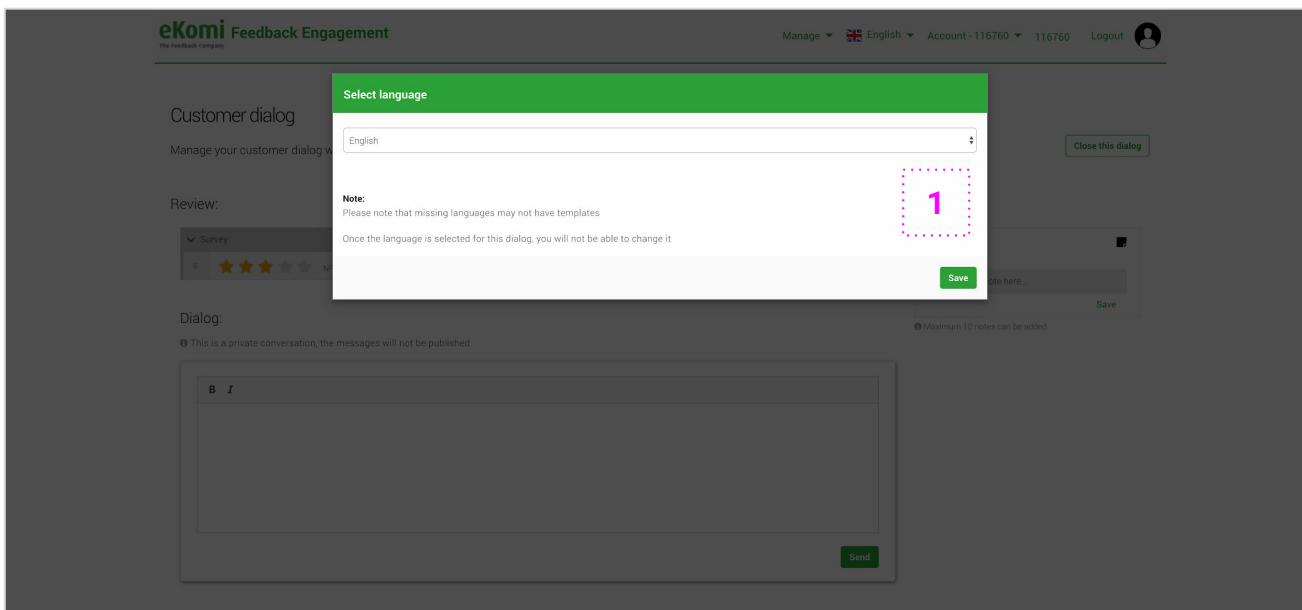
You are free to edit or delete this comment if need be. Similarly to the dialog, the pictogram will become white when a comment has been placed.

3 Tag

Finally, we offer the possibility to tag the reviews.

Those tags are meant for **taxonomy**, the best way to use them is to place them consistently to make your searches more efficient.

To add a tag, simply type a word and hit the "Enter" key.



1 Dialog language

By default, the app will ask you to define a language for the dialog you want to open. Once the language will be defined, you will not see this prompt again.

The language that you select will be used for the communication emails with the client, it will also determine in which language he will see the dialog interface.

Note: if this is redundant or if you always communicate with your customers in a unique language, we can turn this **off** for you. That way, the language will be automatically pre-defined to your preferred language.

If you prefer this approach, please reach out to our support team and they will turn off the option for you.



1 Dialog interface (internal view)

You will then reach the dialog page. This page is available to you and the customer, with slight variations that we will cover.

On this page, you can see some important information about the reviewer. It will allow you to identify him/her and engage in a relevant manner.

We also display the review in question so that you both discuss on the same ground.

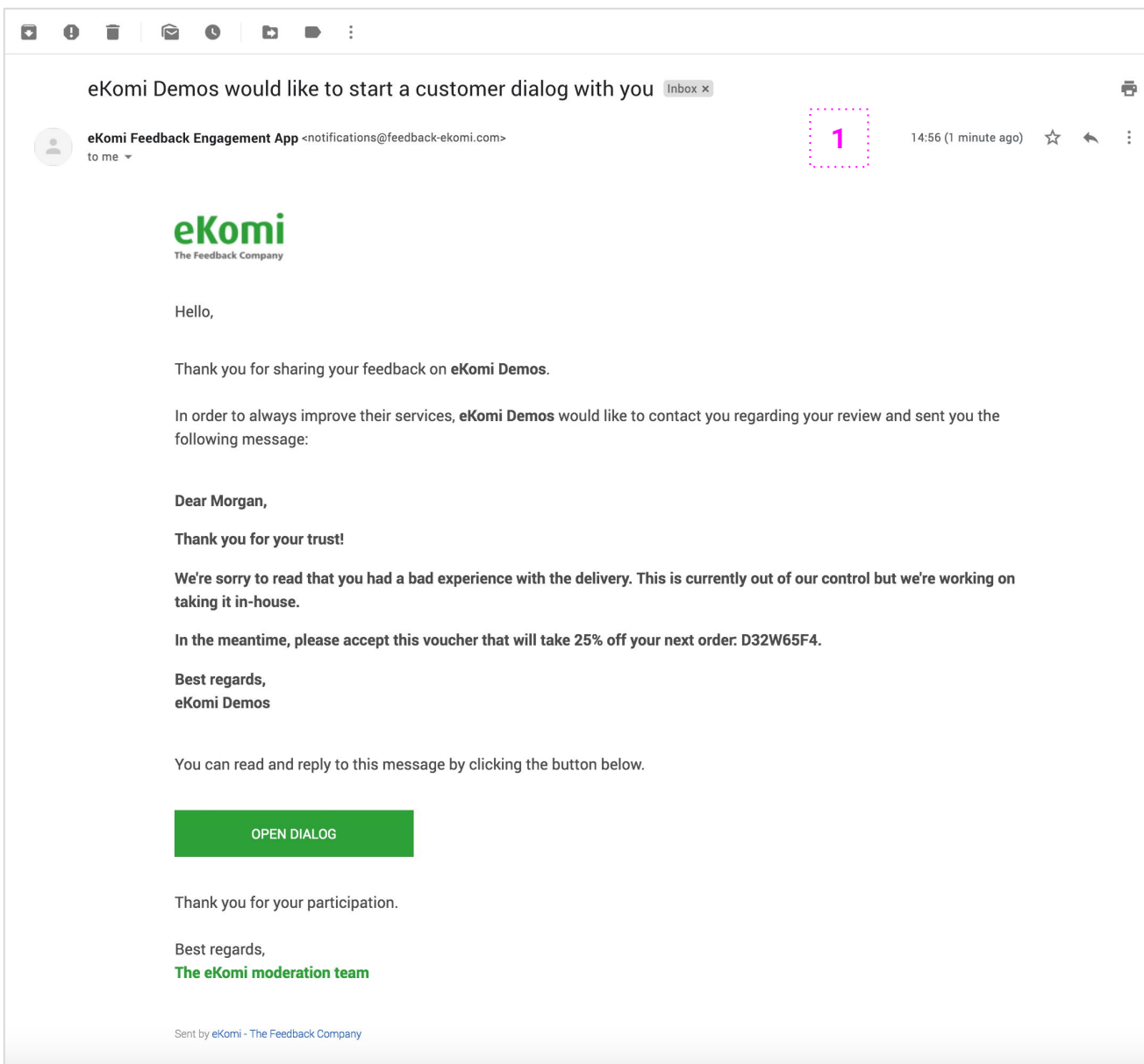
From here, you can type a message and it will be sent to the customer once you post it. He/she will be notified by email and will be able to access the page from there to eventually reply.

Note: The customer will first be notified when you send the first message, not when you initially click on “Open dialog”.

2 Dialog notes

You can easily add quick notes on the dialog page, to log some specific information about the conversation or simply to keep your dialogs documented.

These notes will remain even when the dialog is closed, they are **not** visible to the customer.



1 Dialog emails

As covered before, dialog emails will be sent on various actions. These are the current steps where an email is sent to the customer:

1. When you want to open a dialog
2. When you leave a new message on the dialog
3. When you close the dialog
4. When he/she closes the dialog
5. When he/she eventually withdraws the review

Similarly, you will also receive notifications.

Please note that on step 5, if the review is withdrawn, we will also send a new review link to the customer via email. More on this later.

Note: the dialog email you see on the left is the first one the customer will receive, when you send the first message. It will contain the message that you wrote and an invitation to join the dialog page.



Customer dialog

Manage your customer dialog with **eKomi Demos**

Your review:

Dialog:

This is a private conversation, the messages will not be published

eKomi Demos - 18.07.2019 12:55:56

Dear Morgan,
Thank you for your trust!

We're sorry to read that you had a bad experience with the delivery. This is currently out of our control but we're working on taking it in-house.

In the meantime, please accept this voucher that will take 25% off your next order:
D32W65F4.

Best regards,
eKomi Demos

B I



Close this dialog Withdraw my review



Dialog interface (customer view)

If the customer is interested in discussing with you and clicks on the invitation link in the first email, he/she will land on the similar dialog page with a slightly different view.

From here, he/she will be able to reply to you but also eventually just close the dialog directly (if not interested) or even withdraw the review if need be.

Once the dialog is closed, it will remain accessible but will be clearly marked as closed with a check mark. This can be useful to you for documentation purposes for example.

Dialog:

This is a private conversation, the messages will not be published

eKomi Demos - 18.07.2019 12:55:56

Dear Morgan,
Thank you for your trust!

We're sorry to read that you had a bad experience with the delivery. This is currently out of our control but we're working on taking it in-house.

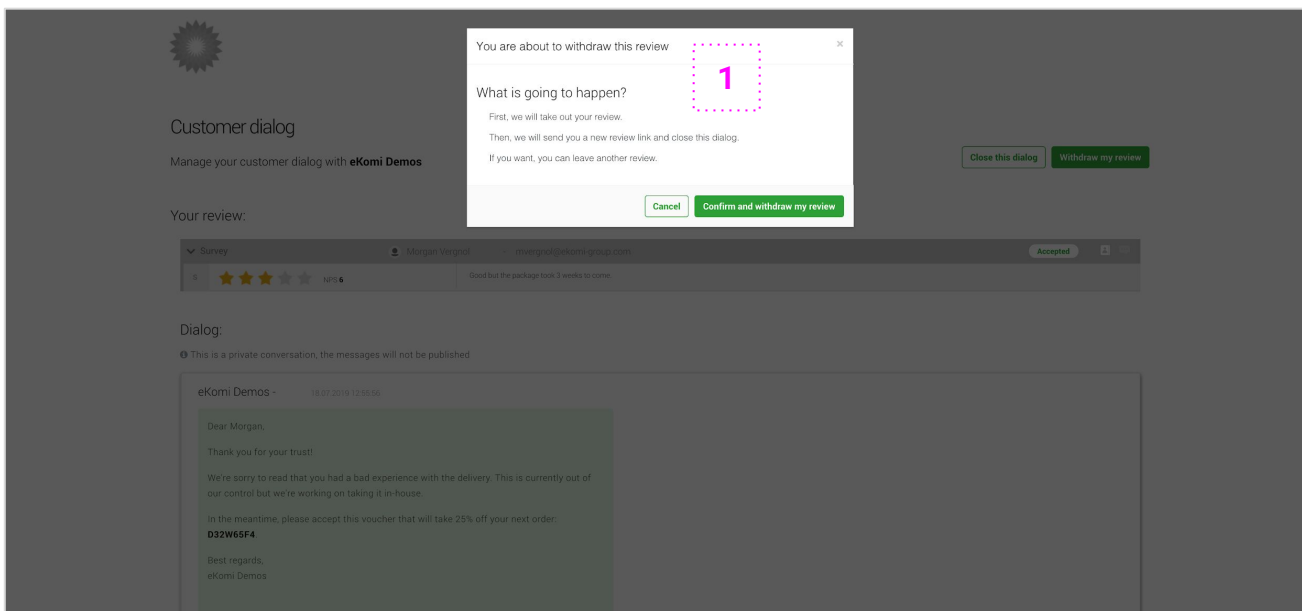
In the meantime, please accept this voucher that will take 25% off your next order:
D32W65F4.

Best regards,
eKomi Demos

Morgan Vergnol - 18.07.2019 13:01:08

Hi,
It's ok! It finally came so everything is fine.
Thanks for the voucher.
Morgan

B I



1 Review withdrawal

If the customer decides to withdraw his/her review and clicks on the corresponding button, he will see a modal window explaining what will happen.

From there, if he/she wants to proceed, the flow will be:

- The review will be taken out in the background
- A new form will be presented to the customer directly
- He/she will also receive a link by email

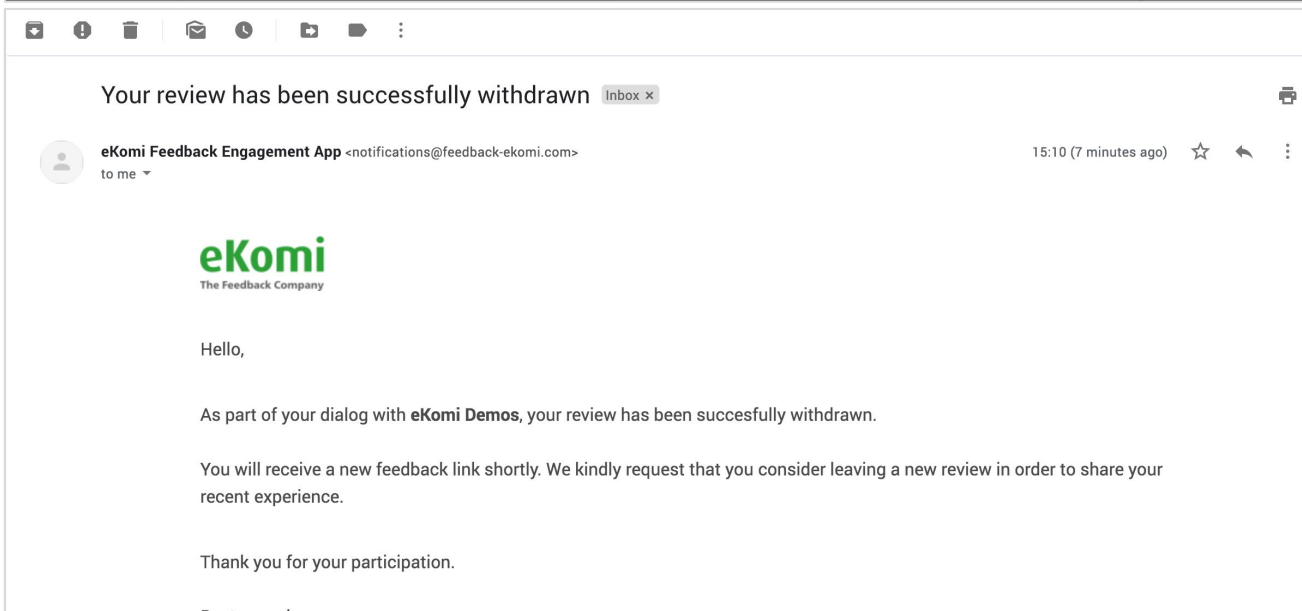
The form that will be presented directly to the customer after clicking on the button will be the same that will be forwarded by email.

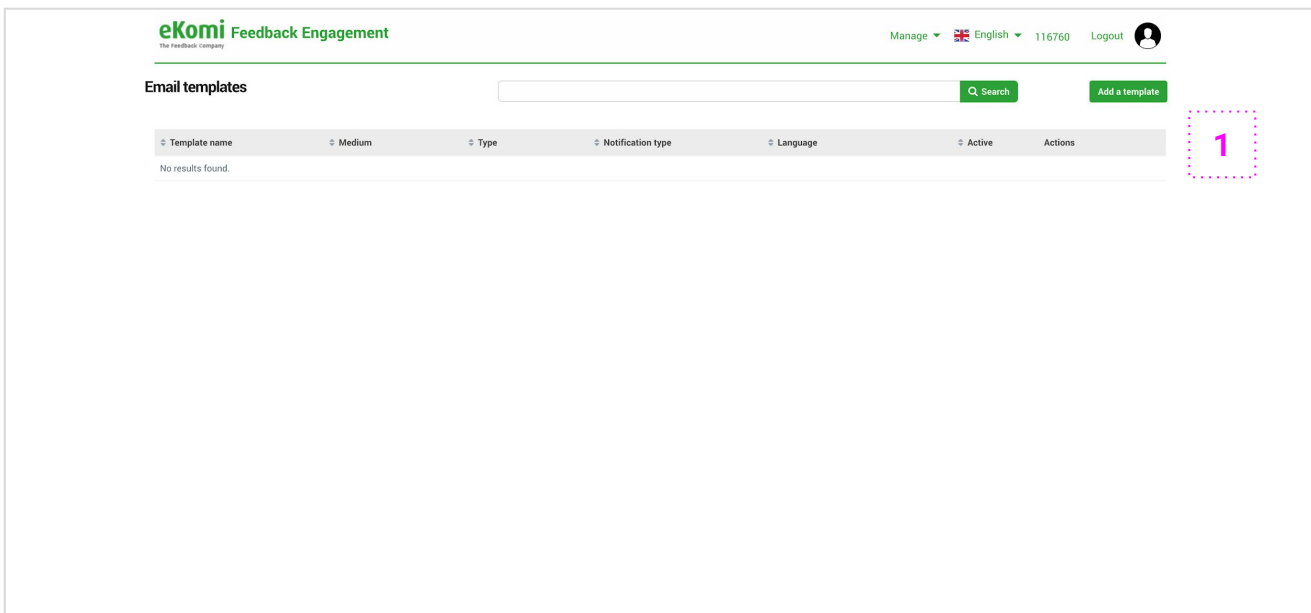
That way, he/she will be able to either leave review directly or just do it later. The customer will be of course only be able to post **one** review.

Notes:

- The old/initial review left by the customer will disappear from the list but you will still be able to find it if needed by using the "Show withdrawn reviews" filter.
- To generate the new review link, eKomi will add a **timestamp** to the initial transaction ID as follow:
 - **Initial ID:** *order123*
 - **New ID:** *order123-1563788720*

This timestamp (1563788720) corresponds to the date/time when the withdraw request was placed - in UNIX format.





1 Email templates

You can access your current email templates in the “*Email templates*” section. Those are mostly used during the dialog process communication, but not only.

By default, you will not see anything on this page - just like shown here. That is fine, it simply means that you currently use the **default templates** that we provide.

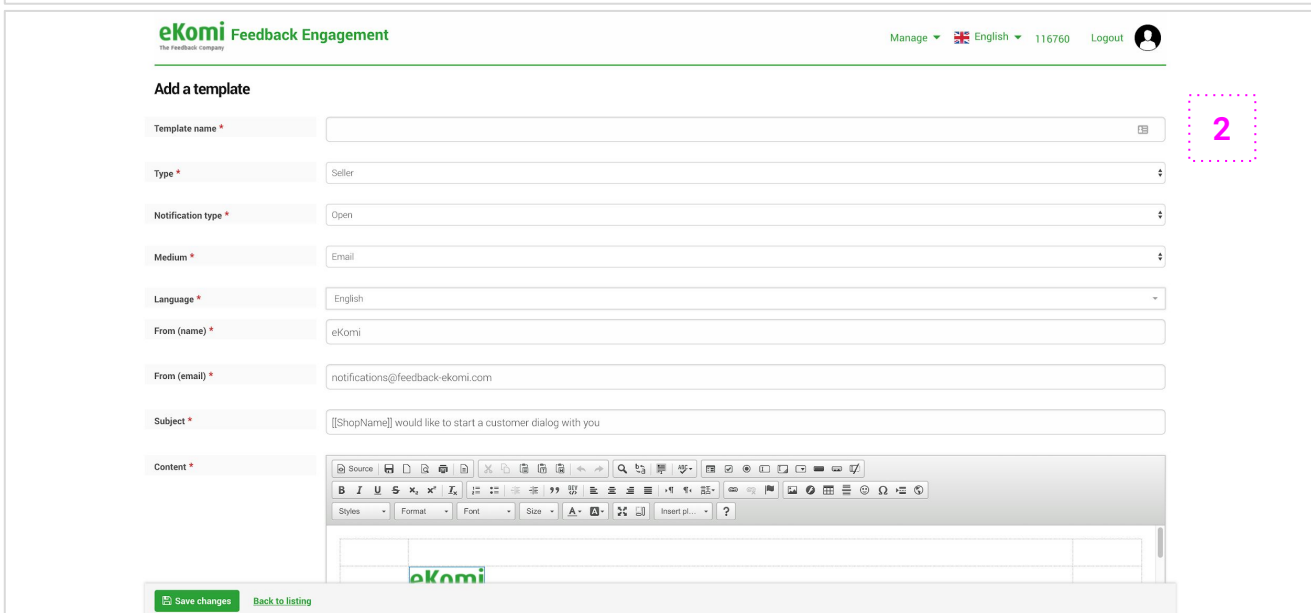
2 Add a template

If you want to add your own, simply click on the corresponding “*Add a template*” button.

From there, you will be prompted to enter all the information that is necessary to generate the new template. Most of the fields are self-explanatory but here are some details about some of them:

- **Type:** the type of review that the template should apply to. If you select “*Seller*” for example, this template will be used for actions that concern seller reviews.
- **Notification type:** the case that you want to cover, most of them concerning specific steps of the dialog process.
- **Medium:** for now email only, but we will eventually extend this list to other mediums like SMS.

Note: if you add a template here, it will **override** the default template that is currently in place for this “*notification type*”.





C.

Review exports

Review exports

Review exports



eKomi Feedback Engagement
The Feedback company

Manage | English | 116760 | Logout

Form-based configuration

Q Search

Sync forms

Form ID	Form name	Form type	Enabled	Actions
54511	1 - Rate your experience	seller	YES	Configure
54555	2 - Rate the product(s)	product	YES	Configure
54577	Integrated content and picture	seller	YES	Configure

1 Configuration types

Besides managing your reviews and engaging with your customers, the Feedback Engagement app offers a quick and reliable way to export your data as CSV files in various ways.

The configurations that we currently allow are:

- **Form-based:** this is most probably the case that you will need and use, it will allow you to define a custom CSV template for each form currently existing on your Smart Forms account.
- **Legacy:** this will allow you to define a custom CSV template for reviews that were collected with our legacy (pre-Smart Forms) system. This case is quite rare and will eventually be removed as it was primarily added to support legacy implementations. If you are using Smart Forms, you can **ignore** this.
- **Custom data:** this will allow you to combine the data from any of your forms. It's a good way to merge your feedback within an account. This is most likely what you will want to achieve when using multiple forms in your surveys..

Note: as you can imagine, we also offer another way to export your feedback, what we call *“bulk export”*. This is meant to be used for **bulk and global** exports of review across several accounts. We will discuss this later.



The screenshot shows the 'Form-based configuration' page in the eKomi Feedback Engagement system. At the top, there's a navigation bar with 'Switch back', 'Manage', 'English', '116760', and 'Logout'. Below that, the 'Form-based configuration' section includes a 'CSV file name' input field with a placeholder 'CSV file name'. A note below the input field states: 'Use placeholders as required: *{Shop_id}* *{Form_Name}* *{Date_Time}* and *{PreviousDate_Time}* (format: 2017_12_30_12_09) *{Date}* and *{PreviousDate}* (format: 20171230) *{Date_Time-dmy_his}* (format: 23042018_125959) *{Time}* (format: 1259)'. A 'Save configuration' button is visible below the input field.

On the right side, there are two columns of available fields. The first column, titled '2 - Rate the product(s) - 54555', contains fields like 'ID: 433745 Rate this product:', 'ID: 433746 Your personal feedback:', and 'ID: 433777 Pros and cons'. The second column, titled '1 - Rate your experience - 54511', contains fields like 'ID: 433595 How would you rate your experience with us?', 'ID: 433613 Information and availability', 'ID: 433614 Check-out process', 'ID: 433615 Customer support', 'ID: 433596 Your personal feedback:', 'ID: 433632 How likely are you to recommend us to your friends and colleagues?', 'ID: 433794 How could we improve?', and 'ID: 949027 Feedback email'. Below these are 'Standard' fields: 'Empty column', 'Hardcoded value', 'Form ID', 'Form name', and 'Form type'. A red dashed box with the number '1' highlights the top two columns of available fields.

1 Fields

The CSV setup is quite simple, the idea is to drag and drop the fields you would want to have in the file. In the right column, you can see all **available fields**.

The first ones (circled in green dashes) are all the individual **questions** available in the form you picked. You can see the form name above. Here, you might see other questions from your linked forms - if that case applies to your survey.

Below those, you will find the more **standard** fields that will allow you to add more data to your exports. This includes, among other things, the transaction ID corresponding to the review, the submission time, your comment (if any)... or basically any metadata that you might be pushing to eKomi - like customer data.

This screenshot shows the same 'Form-based configuration' page as above, but with the 'Daily report - *{Date}*' placeholder in the 'CSV file name' field. The 'Standard' fields on the right are now being dragged into the left column. Four fields are visible in the left column: '1. Order ID', '2. Review submission date', '3. ID: 433595 How would you rate your experience with us?', and '4. ID: 433615 Customer support'. Each field has a 'Column title' input field and a close button. A 'Save configuration' button is at the bottom left. A red dashed box with the number '2' highlights the drag-and-drop action.

2 Drag and drop

As discussed above, adding a field to the file is as easy as dragging it from the right column and dropping it on the grey section in the left column.

Please note that once a field has been added to the file, you are free to **rename** its header title - ie. the name of the column once you import it in Excel for example. In a nutshell, we offer flexibility.

In terms of **placeholders** for the file name, you can also copy and paste any of the placeholders that we currently support - like the date, form name... etc.



1 CSV listing

Once your setup will be defined (and enabled) for the selected form, it will be “*eligible*” to be picked up by the CSV Generation automated task we have covered earlier. This means that, if this configuration is **enabled**, a file will be created for it based on the occurrence defined in the automated task section.

As a matter of fact, you can enable/disable certain configurations and thus decide if a file should be created (or not be created) when the “*CSV Generation*” automated task runs. This automated task is **global**, and picks up all active configurations when it runs.

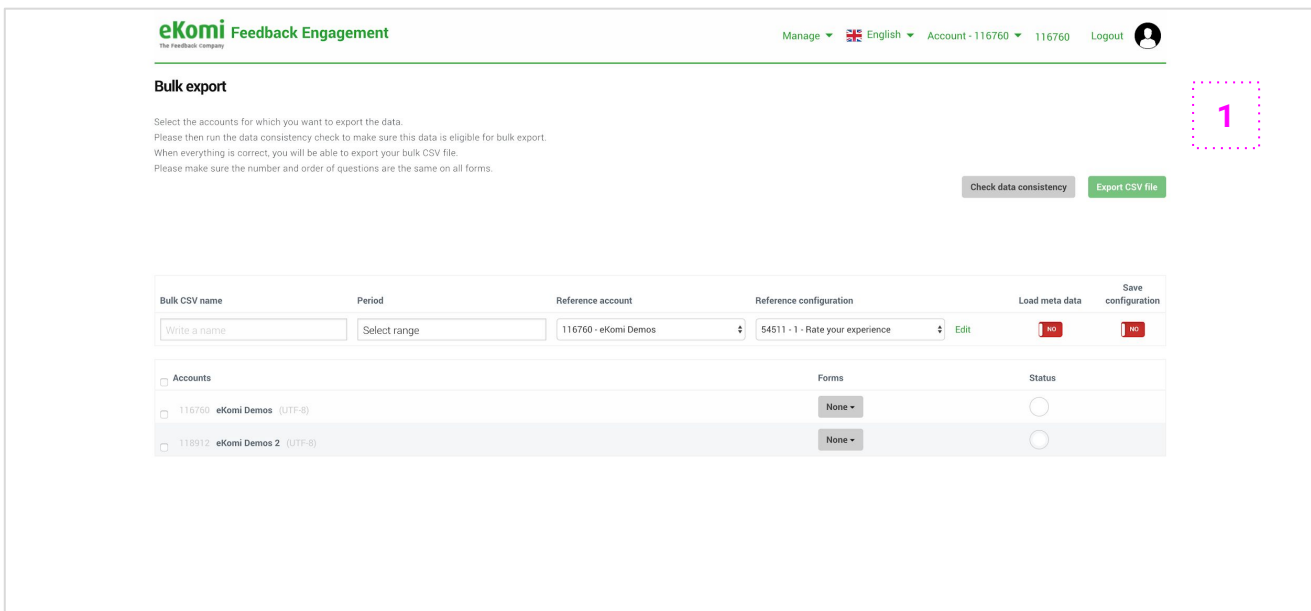
Once generated, the files will be available in the **CSV files** section - you will be able to download or remove them.

Note: for efficiency reasons, only the files that were generated within the last previous 30 days can be downloaded.

2 Quick CSV download

For quick one-time exports, we also support a **manual generation** flow. To do that, simply click on the “*Create a custom CSV*” button in the Form-based configurations listing page.

You will then be able to pick a time range and type of feedback and generate a file right away. It will be available in the CSV files section as usual.



1

1 Bulk setup

If you own multiple eKomi accounts, and if those are all set up in the Feedback Engagement app, then you will be able to run **bulk exports** if need be.

This is made possible thanks to the power of eKomi Connect keeping a **hierarchy** within your accounts. For that matter, you will have to login with your master user to use this feature.

The bulk export logic is quite simple as it simply puts together your **existing** configurations and merges them into a **single** file.

This means that you should create the individual configurations **before** trying to export your data in bulk. This section is only there to put them all together, they need to be defined beforehand.

In terms of flow, the bulk export works as follow:

1. You pick a **reference account** and a **reference configuration** on this account, it will be the common pattern.
2. You pick **one or several associated accounts and configurations**, those will be checked against the reference configuration to verify the **consistency** of the data.
3. If all lights are green, the file will be **exportable**.



Bulk export

Select the accounts for which you want to export the data.
Please then run the data consistency check to make sure this data is eligible for bulk export.
When everything is correct, you will be able to export your bulk CSV file.
Please make sure the number and order of questions are the same on all forms.

Bulk CSV name	Period	Reference account	Reference configuration	Load meta data	Save configuration
Daily report	2019-08-05 / 2019-08-06	116760 - eKomi Demos	54511 - 1 - Rate your experience	Edit	YES NO

Accounts	Forms	Status
<input checked="" type="checkbox"/> 116760 - eKomi Demos (UTF-8)	54511 - 1 - Rate your experience	●
<input checked="" type="checkbox"/> 118912 - eKomi Demos 2 (UTF-8)	64379 - Seller with NPS	●



Data consistency

As stated before, the bulk export feature will allow you to merge existing configurations in order to create a grouped unified file.

This implies that the configurations should be consistent in order to gather and merge all this data in a single file.

By consistent, it is assumed that:

- The configurations have the same **number of columns**
- The **encoding** use in the configurations are the same

For example, if your reference configuration contains **5 columns** and is encoded with **UTF-8**, it means that all the additional configurations that you want to add in the file will have to respect those constraints.

Please note that you can always use **empty columns** to make your configurations even, simply drag them from the list of available fields.

For example, if you have only 4 fields to add in a configuration while your reference configuration contains 5, simply add an empty column to reach consistency.

The “*Check data consistency*” button will allow you to verify if data is correct. If so, all lights will be green and you will be able to download the file.



eKomi Feedback Engagement The Feedback company Manage English Account - 116760 116760 Logout

Bulk export configuration Create bulk export Add configuration

Bulk CSV name	Start date	End date	Metadata	Enabled	Created at	Actions
Daily report	05.08.2019	06.08.2019	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05.08.2019	Edit Delete

1 Save configuration

The steps mentioned earlier work fine if you want to download a one-time bulk file.

However, if you need this to happen **regularly** you can simply save the configuration. That way, you will not have to set this up every time.

If you **save the configuration**, it will basically be picked up and generated every day by the “*CSV Generation*” automated task, just like any other file.

As long as the configurations **remain consistent** the file will be generated properly every time the automated task runs. This is convenient for recurring bulk reports.

You can define and save **multiple** configurations at once. They will be listed in the Bulk export section and you will be able to enable/disable them as you please.

Note: you might have noticed the “**Metadata**” switch. If enabled, we will fetch and append the metadata of each account and add it to the file - this can be useful if you push customer data to us as metadata for example.



D.

Advanced features

Advanced features

Advanced features



The screenshot shows the 'Create SFTPSSetting' interface in the eKomi DataOut application. The left sidebar contains navigation options: Browse Files, Job Management, Log Management, SFTP Settings, GPG Settings, and Email Settings. The main content area has the following fields:

- Sftp host *
- Sftp user *
- Sftp port * (value: 22)
- Sftp private key (highlighted with a red dashed box and the number '1')
- Sftp key password

At the bottom of the form, there are two buttons: 'Save' and 'Test connection'.

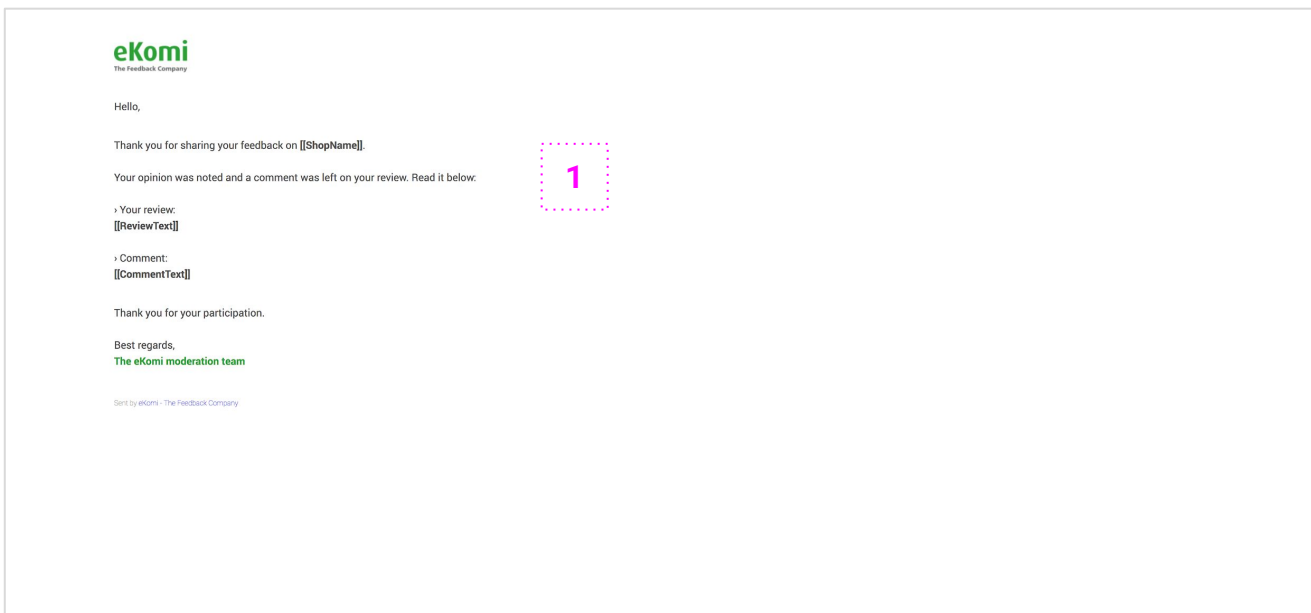
1 File transfer

For more advanced needs, we offer another way to retrieve your CSV files besides simple manual download.

If you need your export process to be more streamlined, we can setup your account so that the CSV files will get **transferred** to your own server via another eKomi app called “DataOut”.

The setup is simple here, we will simply need to open the **(s)FTP** connection between our eKomi DataOut server and your server. Then, the files will automatically land on your server when they get generated.

Please reach out to our support team if you are interested in this feature.



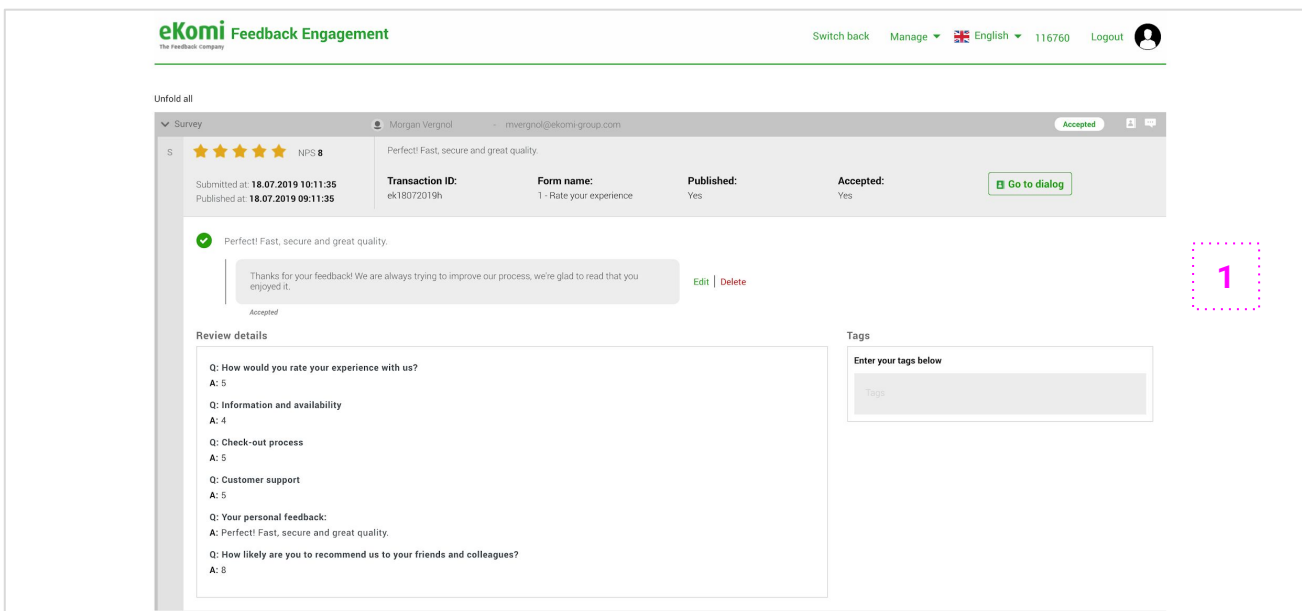
1 Comment notification

By default, when you leave a comment on a review, we do not inform the end-customer.

However, in certain cases, it can be something that you might want to have. Luckily, we offer this as an advanced feature.

If enabled, the end-customers will be **notified by email** (see default template on the left) whenever you leave a comment on their review.

Please reach out to our support team if you are interested in this feature.



1 Automatic comments

If you receive a lot of reviews and want to streamline the commenting process, we offer a feature that basically posts comments for you automatically based on a set of rules.

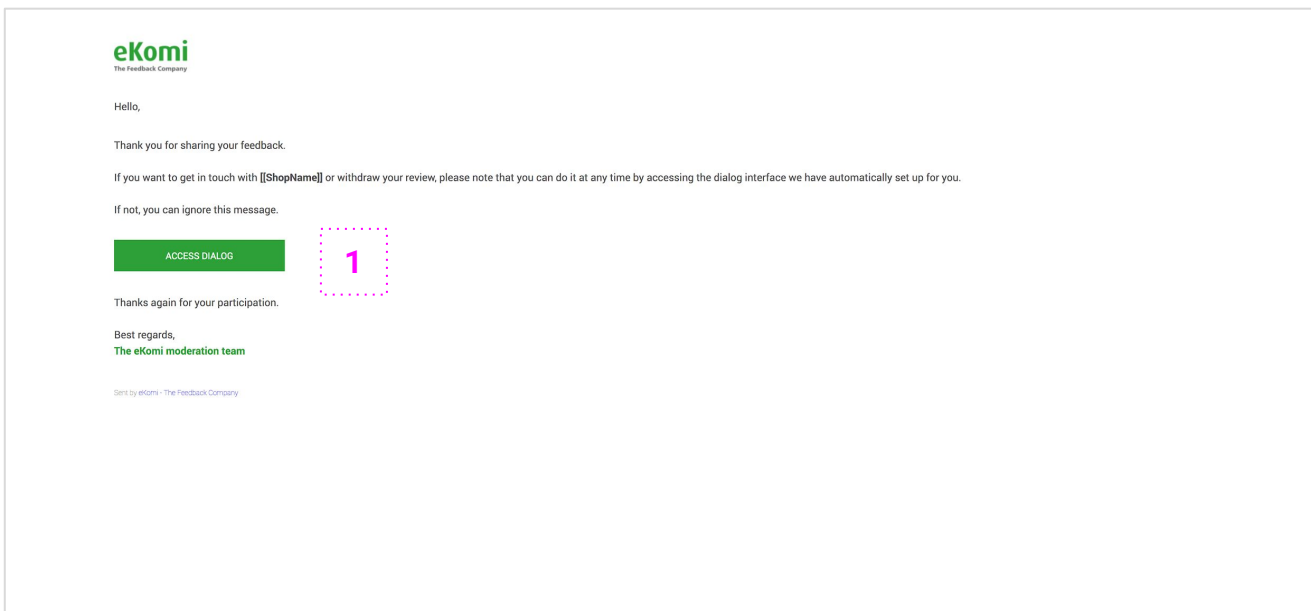
To use this, you first have to define a few comment **templates** for each types of reviews (negative, neutral, positive). Those will be posted later on according to the type.

The rules for automatic posting are currently as follow:

- Only about **50% of the incoming reviews** will be commented to avoid a spam-looking effect.
- The comments will be posted **1 day after** the review was left to avoid instant posting.
- If there is more than 1 template for a review type (e.g negative), then the comments will **randomly shuffle** with equal probability.
- This feature only applies to **seller and product** reviews.

Please note that this feature should be **enabled** for you by an eKomi support agent as it is an advanced feature.

Once enabled, you will have to create an **automated task** that will take care of posting the comments. This task is called “*Auto Comments*”, you can use it to define when the comments should be posted.



1 Automatic dialogs

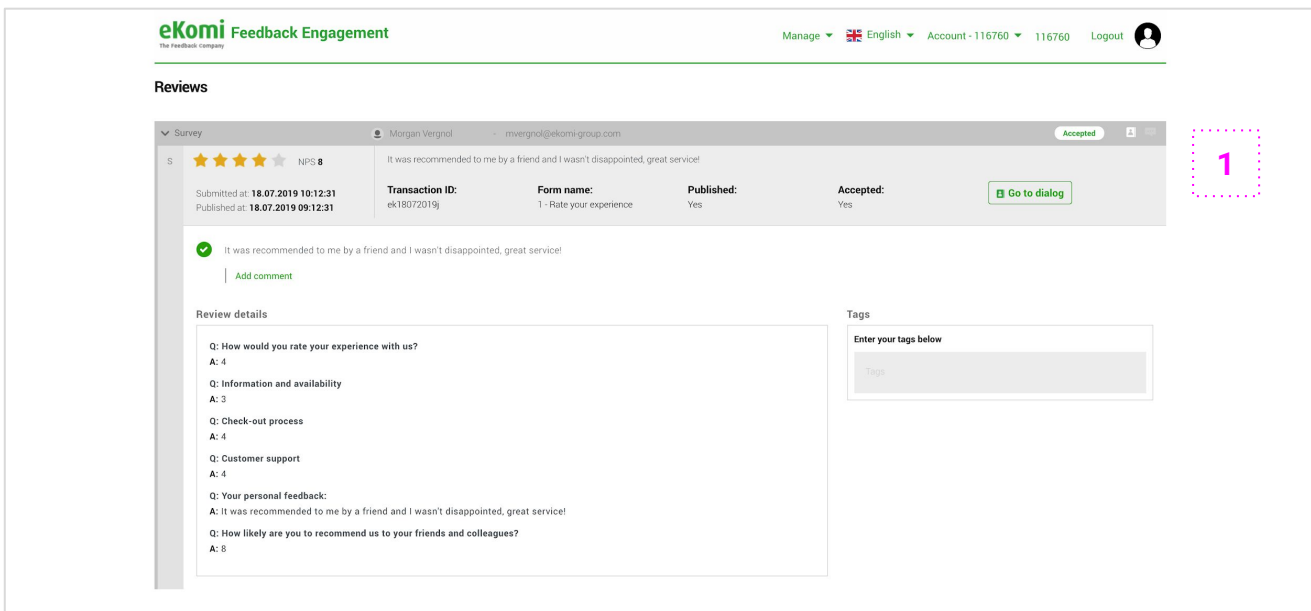
To go a bit further, you can also automate the **dialog opening** process if need be. The idea is to let the end-customers reach out to you directly if they want to instead of having to do it yourself systematically.

If automatic dialogs are enabled, an **invitation email** will be sent to all reviewers (for which we have the email address) when importing their reviews - based on the “*Review import (SFF)*” automated task.

This email will contain a thank you message and a link to **open a dialog** with you if the end-customer wants to reach out for any reason.

If and when that happens, you will be notified by email as soon as the first message is posted. You are then free to jump in and proceed with the dialog flow **as usual** - based on the steps we described earlier.

Please note that this feature should be **enabled** for you by an eKomi support agent as it is an advanced feature.



1 Direct review access

Lastly, if you have specific workflow needs that require **direct access** to each review please note that we offer a unique URL access per review. If you want to open a review directly, simply use the URL scheme showed on the left.

Please note that this link will only take you to the review if you are logged in with a user that has appropriate roles.

You will have to populate the following fields:

- **SHOP_ID**: your account identifier
- **ORDER_ID**: the transaction ID associated to the review

A practical use case for this would be to setup a direct link to the review from the **eKomi Workflow** app notifications.

In this case, the flow would be:

1. The end-customer leaves a review.
2. You get notified by receiving a notification from the eKomi Workflow app.
3. In this notification email, you set up the link shown on the left so that you can directly access the review (based on the Shop and Order IDs).
4. When clicking on this link, you will be taken to the individual review page on the Feedback Engagement app and be able to engage.

URL scheme:

[https://engage.ekomiapps.de/review?shop=*\[SHOP_ID\]*&order=*\[ORDER_ID\]*](https://engage.ekomiapps.de/review?shop=*[SHOP_ID]*&order=*[ORDER_ID]*)



Thanks!

If you have any questions, please get in touch with our support team.

support@ekomi.com