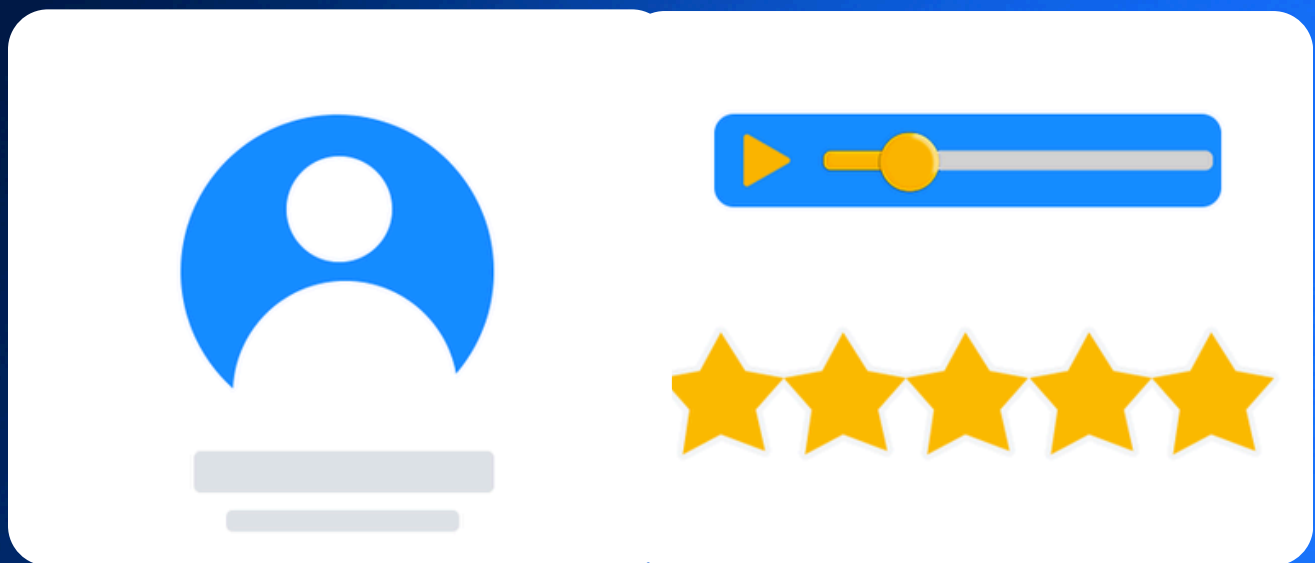


REFERENCE GUIDE

Video Testimonials

Collect, approve, and show video proof



Collectors and Responses

What It Is

Search for Video Testimonials. The Collectors tab lists your recording pages, and the Responses tab is the video inbox where customer submissions land.

How It Works For Your Business

- Search for Video Testimonials.
- The Collectors tab lists every collector you build. You can make many, such as one per service.
- The Create Collector button starts a new collector from the Welcome Page step.
- The Responses tab shows each video, and lets you watch it or download the original file.
- Customers record on a computer or phone with no app, for up to 2 minutes and 30 seconds.

Collectors and Responses – Tips & Guidelines

Tips

- A first-time account shows an empty list, and that is normal.
- Think of one collector per service as you plan.
- Use Preview on a collector to see what customers see.
- The button label may vary a little, so go by what you see.

DO

- Click both tabs to learn them
- Plan one collector per service
- Preview as a customer
- Download originals you want to keep

DON'T

- Expect Responses to fill by itself
- Ask customers to install an app
- Mix every service in one collector
- Skip the Preview

Welcome Page Setup

What It Is

The Welcome Page is the first screen a customer sees. It holds a public title, a spokesperson, a short How it Works note, and a welcome message.

How It Works For Your Business

- Click Create a Video Collector to land on the Welcome Page step.
- Fill in the Public Collector Title. It is the only required field and customers see it.
- Turn on Spokesperson Image, upload a photo, and add a name, role, and short description.
- Add a short How it Works note and a Welcome Message from the spokesperson.
- Click Save, then Preview to read the page as a customer.

Welcome Page Setup – Tips & Guidelines

Tips

- Write the title like you are speaking to one person.
- Pick a photo where you look at the camera in good light.
- Two short sentences is plenty for a welcome message.
- The title is public, so write it for customers, not for yourself.

DO

- Use a warm, clear title
- Use a real face
- Keep text short
- Preview after every change

DON'T

- Sound like a form
- Use a blurry photo
- Write a long paragraph
- Skip saving

Questions, Attribution and Thank You

What It Is

After the Welcome Page, the Questionnaire guides the video, the Attribution Page captures who your customer is, and the Thank You Page closes the experience.

How It Works For Your Business

- On the Questionnaire step, add up to three questions and put them in order.
- Start with an easy question and end with the big payoff.
- On the Attribution Page, fill in a Headline and Message that explain why you ask who they are.
- Check on screen whether a marketing consent option appears and how it is worded.
- On the Thank You Page, add a Headline, Message, and Spokesperson's Email, then Save.

Questions, Attribution and Thank You – Tips & Guidelines

Tips

- Three questions is the limit and a good one.
- Write questions like you would ask over coffee.
- A video with a name is much easier to use and thank.
- Step names and order can differ slightly, so use what you see.

DO

- Keep questions plain
- Order them easy to hard
- Explain why you ask for a name
- Offer a contact email

DON'T

- Add jargon
- Ask long questions
- Skip the Attribution wording
- Write a cold thank you

Branding and Preview

What It Is

The Branding step makes your collector look like your business. You add a logo, set colors, preview on desktop and mobile, then save.

How It Works For Your Business

- Open the Branding step and upload a clear logo.
- Use the white background option if a see-through logo looks bad on the page.
- Set the background, text, secondary text, accent, and button colors.
- Switch between desktop and mobile views to check how it looks.
- Click the final button, which may read Save or Publish, when it looks right.

Branding and Preview – Tips & Guidelines

Tips

- Most customers record on a phone, so check mobile first.
- Dark on light or light on dark keeps text readable.
- Copy your website colors for a matching look.
- Fix problems before you send the link to anyone.

DO

- Use a clear logo
- Check phone view
- Match your website
- Save when happy

DON'T

- Use low contrast text
- Upload a tiny logo
- Skip mobile preview
- Send the link first

Sharing the Collector Link

What It Is

Every collector has a link you can send anywhere. You can paste it into an email, a text, or a social post, or turn it into a QR code.

How It Works For Your Business

- Use Copy Link on a collector to get its address.
- Paste the link into an email, a text conversation, or a social post.
- Generate a QR code so people can scan and record from a phone.
- Customers open the link, then record or upload a video from a computer or phone.
- Videos are capped at 2 minutes and 30 seconds, and no app is needed.

Sharing the Collector Link – Tips & Guidelines

Tips

- Tell customers it takes about two minutes.
- Test the link on your own phone first.
- Use the right collector for each service.
- Look for the QR code option on the collector.

DO

- Test the link yourself
- Say it is quick and easy
- Use one link per service
- Share it where customers already are

DON'T

- Send an untested link
- Hide what it is for
- Reuse the wrong collector
- Promise longer videos

Requesting by Email, SMS or WhatsApp

What It Is

Send Review Request can point customers to your video collector. You choose Email, SMS, or WhatsApp, edit the template text, and track the request.

How It Works For Your Business

- Use Send Review Request and choose the video collector as the destination.
- Pick the channel: Email, SMS, or WhatsApp.
- Edit the request template so it sounds like you.
- Send it to the customer, then track it in Reputation, Requests.
- A video request in a workflow action may not be available in every account, so check yours.

Requesting by Email, SMS or WhatsApp – Tips & Guidelines

Tips

- Keep the message short and personal.
- Name the person and the service in the text.
- Check Requests to see what went out.
- Look for the option labeled Send Review Request if the label differs.

DO

- Personalize the template
- Pick the best channel
- Track every request
- Keep it short

DON'T

- Send a generic blast
- Skip the template
- Forget to check Requests
- Write a long message

Reviewing and Approving Responses

What It Is

The Responses tab is where you watch each video and decide what shows. You can see details, filter by collector, and turn one testimonial on or off.

How It Works For Your Business

- Open the Responses tab and play a video.
- Look for details such as name, consent status, collector name, and date.
- Look for a setting for auto-publish or manual approval.
- Toggle one testimonial's visibility without editing anything else.
- Filter responses by collector to find videos for one service.

Reviewing and Approving Responses – Tips & Guidelines

Tips

- Watch a video before you turn it on.
- Check the consent status before you show a video.
- Manual approval gives you the final say.
- Which details show can vary, so use what you see.

DO

- Watch before showing
- Check consent
- Filter by collector
- Use manual approval if unsure

DON'T

- Show videos unseen
- Ignore consent
- Mix up collectors
- Edit when a toggle will do

Showing Testimonials in a Widget

What It Is

A review widget can display your approved videos on a funnel or website. You choose Video Testimonials as the type and pick which collectors feed it.

How It Works For Your Business

- Search for Reputation, open Widgets, or use Create a Video Widget.
- Choose Video Testimonials as the review type.
- Pick the collectors the widget should pull from.
- Adjust the layout and appearance settings.
- Click Copy Code and paste it into a custom HTML block on a funnel or website.

Showing Testimonials in a Widget – Tips & Guidelines

Tips

- Point each widget at the collectors that fit the page.
- Preview the widget before you publish the page.
- Only approved, visible videos should appear.
- Settings names can vary, so use what you see.

DO

- Choose the right collectors
- Preview the widget
- Paste the full code
- Approve videos first

DON'T

- Pull every collector everywhere
- Paste half the code
- Skip the page test
- Forget to approve

Workflows and Multiple Collectors

What It Is

The Video Testimonial Received trigger starts a workflow when a video arrives. You can also run several collectors and keep responses sorted by collector.

How It Works For Your Business

- Search for Workflows and choose the trigger Video Testimonial Received.
- Use filters such as Marketing Consent (Granted or Not Granted) and Video Collector.
- Add actions like Send Internal Notification, a thank-you SMS or email, Add Task, or Add Note.
- Test with a real submission and check Enrollment History.
- Create a second collector for another offer, and edit or manage collectors from the list.

Workflows and Multiple Collectors – Tips & Guidelines

Tips

- Filter by consent so the right message goes out.
- Use the video link custom value in notes and messages.
- Test before you rely on it.
- Duplicate and delete options can vary, so look for them in the list.

DO

- Test with a real video
- Use the filters
- Notify your team
- Name collectors clearly

DON'T

- Skip Enrollment History
- Leave filters blank by mistake
- Thank without checking consent
- Delete a busy collector

Key Terms Glossary

Collector

Your branded page where customers record or upload a video.

Responses

The tab where customer videos arrive.

Spokesperson

The person customers feel they are talking to.

Public Collector Title

The title customers see on the Welcome Page.

Questionnaire

The step where you add up to three questions.

Attribution Page

The page that captures who your customer is.

Marketing consent

Whether a customer allows you to share their video.

Branding

Your logo and colors on the collector.

Copy Link

The option that gives you a collector's web address.

Review widget

A display that shows your videos on a page.

Trigger

The event that starts a workflow.

Enrollment History

The log that shows which contacts a workflow ran for.

Getting Help

Your software changes over time, so a button or setting may look a little different from this guide. If something does not match, check the in-app help for Video Testimonials and Reputation, and look for the option with the closest name.