SocialCompass

Client Support: Frequently Asked Questions

Support Services | support@social-compass.com

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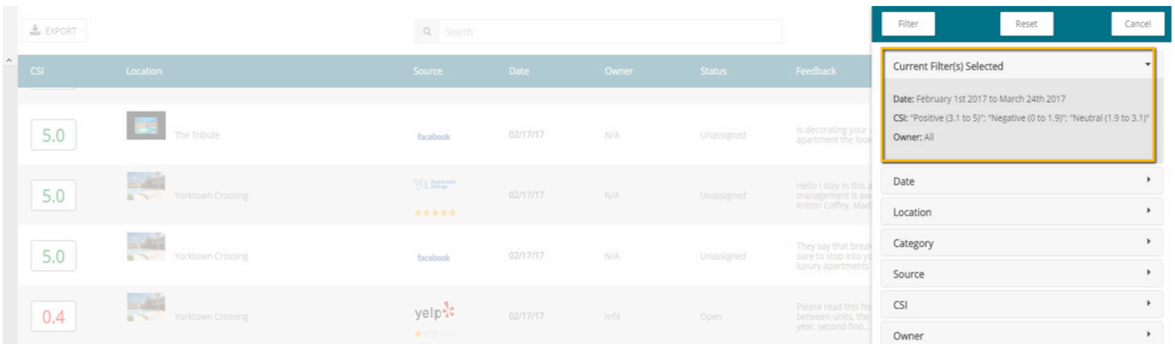
Reviews

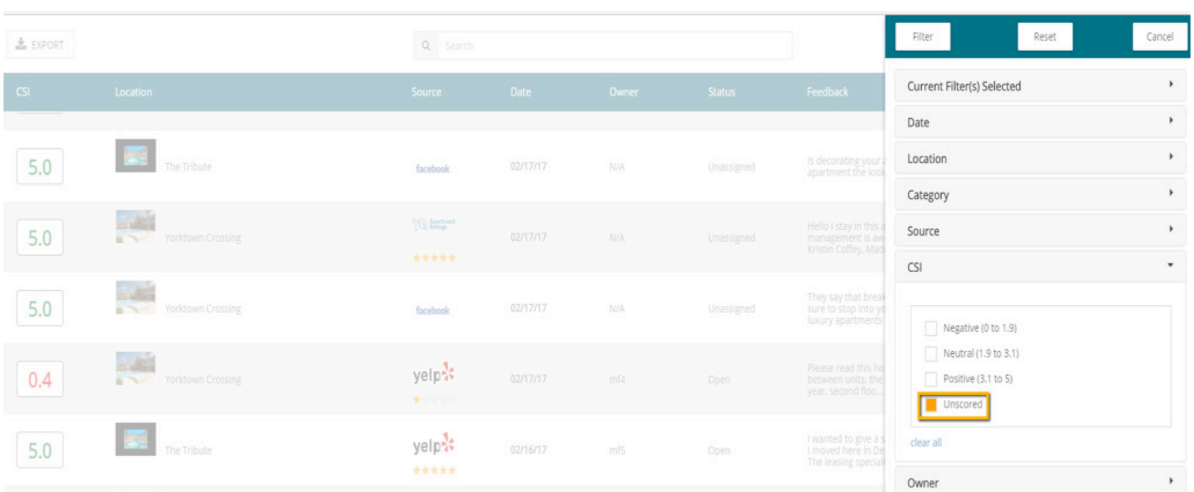
What if I see a review on a source site that's not on the dashboard?

Depending on the site it takes differing amounts of time to pull reviews into the dashboard. Most reviews should be available in the dashboard within 24 hours. The best place to see all your reviews is the listen tab. If any reviews are missing, click on filter in the top right and check that you do not have filters selected that would prevent you from seeing the review.



I have checked my filters and still do not see the review – where can I find it?

If you still do not see the review, check unscored under the CSI drop-down menu. This will show all untagged data. If the review is listed, it has not gone through the Natural Language Processing (NLP) or contains no customer experience information. If the review is still not available, please contact support@social-compass.com. We will investigate the issue.



Reviews

How do I delete reviews from the dashboard?

We recommend keeping a review in the dashboard if it has not been deleted from the source site (e.g. Google Plus, Apartments.com, Facebook, etc.). If there is content in the review that violates the source site's policies, you can contact the source site to remove the review.

To remove the review that no longer appears on the source site:

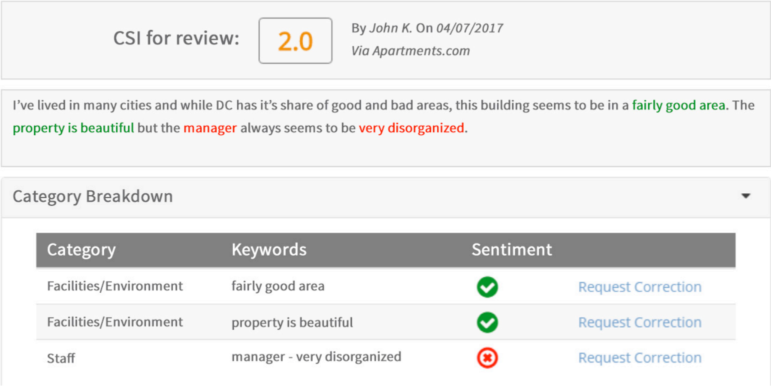
1. Email support@social-compass.com
2. In the email, include the location, the source site of the review, the date of the review, and the content of the review.
3. Once the review is removed from the Chatter Insights dashboard, you will receive a confirmation email.

I see a positive insight that is marked as negative. How can I request a review of the score?

Our NLP is 90% accurate when analyzing sentiments. Users can request a change to the score if they believe an insight is scored incorrectly and our team will review your request.

To request a change to the score:

1. Under the **listen** tab, click a review to get the **feedback details**.
2. Click category breakdown.
3. Click request correction.
4. In the pop-up box enter a reason for the request to correct sentiment.
5. Our support team will take care of your request.



Reviews

How are reviews scored?

Each review is broken down into insights, which are meaningful pieces of information found within the review.

Each insight is then assigned a category that relates to customer satisfaction. For example; "The office staff is unorganized, but the building is beautiful."

This sentence has two insights:

- One negative insight related to the category of office staff.
- One positive insight related to the facilities.

The score of each insight is used to calculate the overall score of the review.

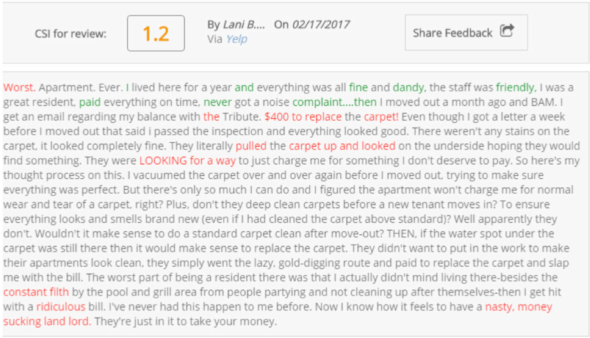
Reviews are scored on a 5-point scale from 0 to 5, 0 being most negative and 5 being most positive. This score is referred to as the Customer Satisfaction Index (CSI).

What's the difference between a review and insight?

A review is the feedback submitted by a customer. This feedback can be published on social media sites, online review sites, or surveys.

An insight is a meaningful piece of sentiment in a review that is analyzed and assigned to an operational category based on our NLP.

A review can contain one or multiple insights.



Dashboard Updates

How do I add a new location to the dashboard?

To add a location:

1. Email support@social-compass.com
2. In the email include the location's name as you would like it to appear in the dashboard.

To remove a location:

1. Email support@social-compass.com
2. In the email include the location's name as it currently appears in the dashboard.

How do I add competitors for my locations to the dashboard?

To set up competitors:

1. Email support@social-compass.com with a filled-out copy of our Phase 2 onboarding document.
2. You are allowed three competitors per location. Ask your customer success manager today about adding more competitors to your contract.

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Source Accounts

What is a source account?

A source account is the login credentials for the source of your reviews. We support engagement with third-party sites through our dashboard. We need the username and password for these source sites to post your review responses. If sources vary per location, please provide the credentials as well as the web address for each location.

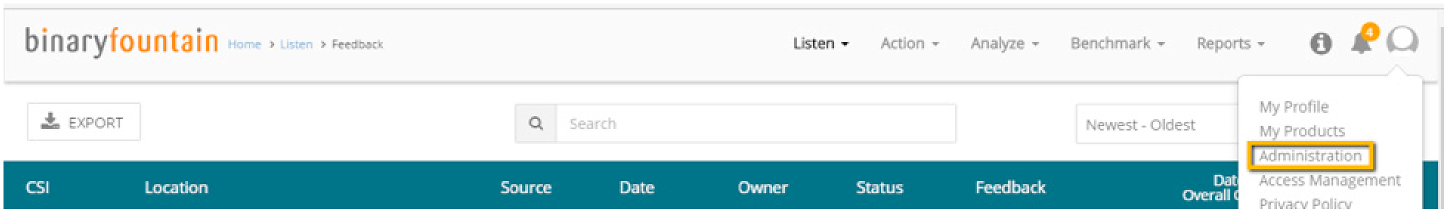
How do I set up a source account?

There are two ways to setup or edit a source account:

1. Email support@social-compass.com with the login credentials for the source account you would like to respond to for reviews as well as which location(s) the login credentials are associated.
2. Add a source account through the **administration** tab in the top right drop-down menu then click **manage** on the left.

To add a social media account: Ex. Google +

1. On the top right drop down menu, click **administration**.

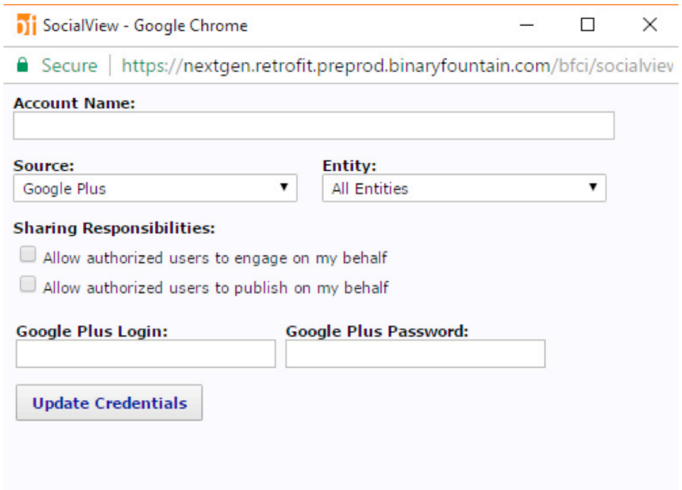


2. On the left side of the page, click **manage** then **manage source account**.

Source Accounts

3. Click **add account**.

4. Enter the required information in the pop-up window. Account Name: Ex. Google + and choose your source and entity from the drop-down menus.

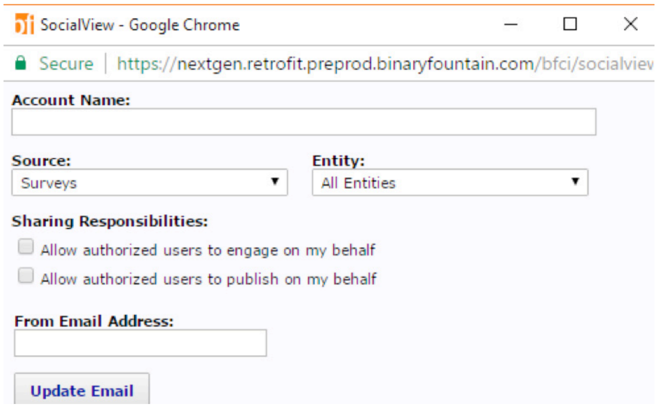


5. Check the two boxes under sharing responsibilities so our system can post your replies on the source sites.
6. Enter in login and password for source account.
7. Click **updated credentials.**

Source Accounts

How do I set up a survey source account?

1. On the top right drop-down menu, click **administration**.
2. On the left side of the page, click **manage** then **manage source account**.
3. Click **add account.**
4. Enter the required information in the pop-up window. Account Name: Ex. Name of Survey and choose the source survey and entity from the drop-down menu.
5. Check the two boxes under sharing responsibilities so our system can email your reply.
6. Add a from email address to respond to your Chatter Insights' surveys. This is the email address that will appear as the from address when you reply to a customer's survey response.
7. Click **update email**.



Source Accounts

To edit your existing source account information:

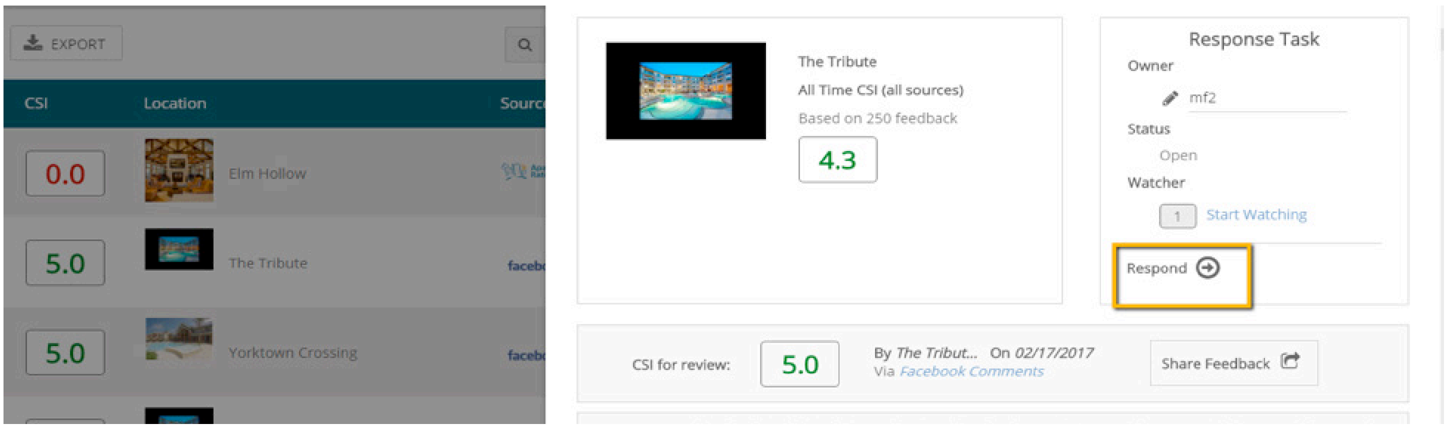
1. Click **manage source account**.
2. Click on the name of the source account from the list.
3. Go to the gear symbol and click the drop-down arrow next to **manage**.
4. Click **edit selected account**.

5. Edit information in the pop-up window to make your changes.
6. Click **update record**, **update email** or **update credentials** depending on source account.

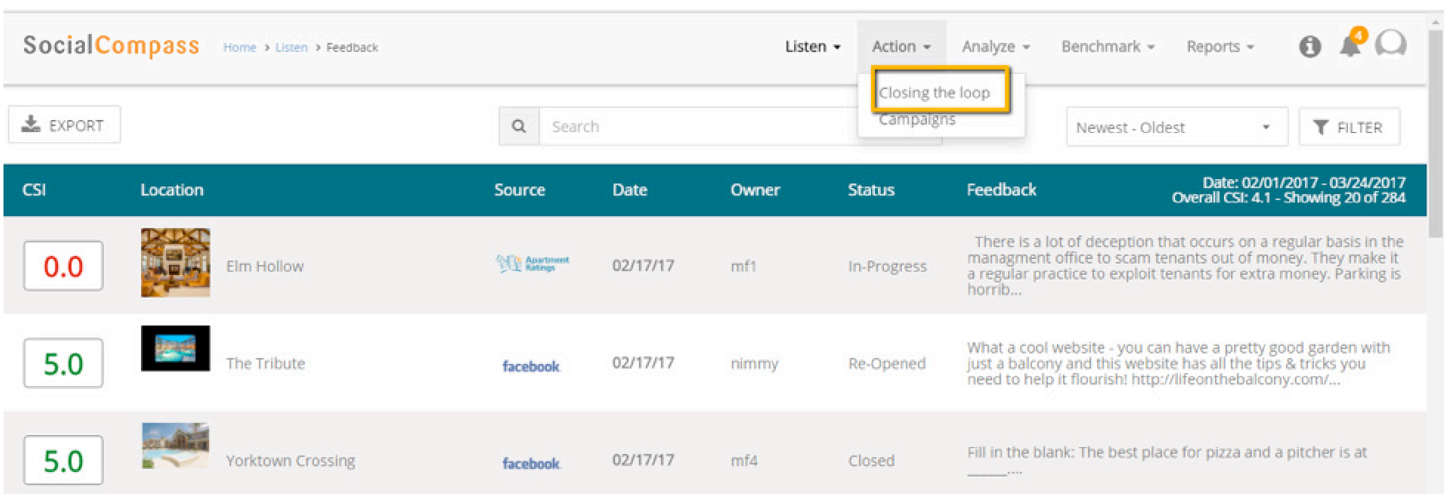
Closing the Loop

How do I access closing the loop?

You can access **closing the loop** by clicking on a review on the landing page, then **respond** on the feedback detail pop-up box.



Or by clicking **action > closing the loop**.



Closing the Loop

What does the "Owner" represent in Closing the Loop?

The owner will generally be the default assignee. This is a user who has a task enabled rule which atomically makes them responsible for tasks for a location. Owners will receive email alerts depending on their rule setup and will have tasks assigned to them. Their user name will populate on the task details and also on the feedback and closing the loop pages next to the task/review.

Define Alert, Rule, and Task

Alert: Email alerts notify a user when a comment is received that has a **feedback score** falling within a certain range. The scale for the **feedback score** is from 0 to 5 with 0 being most negative and 5 being most positive. You can customize the score range and type of alert you wish to receive. You can also enable a task for closing the loop and add an escalation matrix when setting up an alert.

Rule: A rule is the user-specific criteria setup for receiving email alerts.

Task: A task is an assignment that involves responding to a review. Tasks are set up through rules in **closing the loop**. Tasks can have escalation matrices attached to hold users accountable.

What are my options to respond to the review and close the task?

Respond Online: This option allows you to directly respond to reviews from the dashboard. This option will auto-populate on the task details page. To respond, a source account will need to be set up for the specific source.

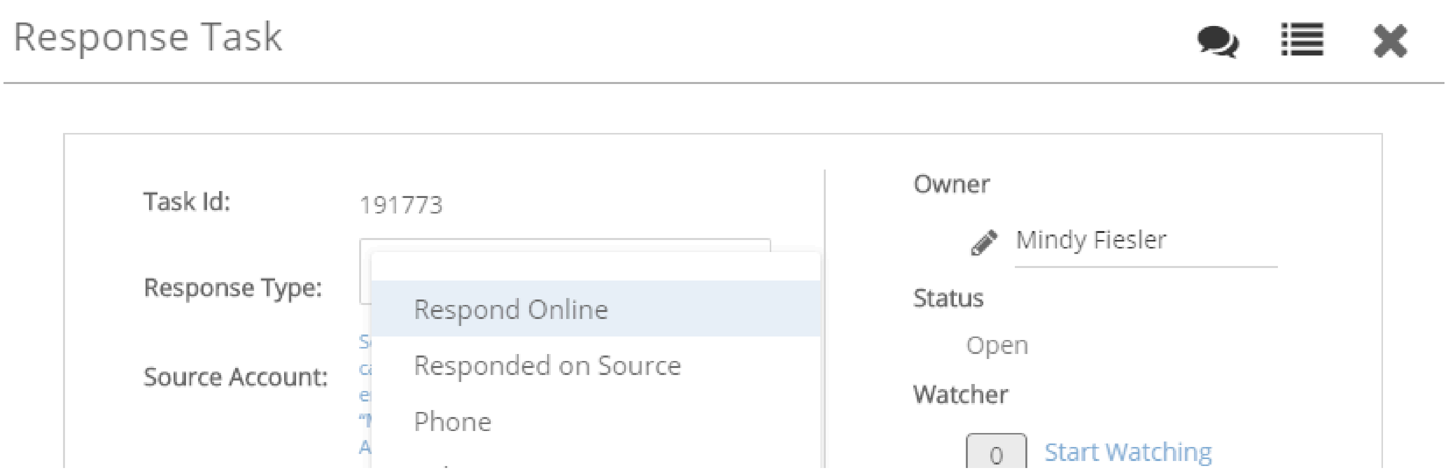
Responded on Source: This option is used when you respond to a review directly through a source site, not through the dashboard.

Phone: This option can be used when you take direct action offline through a phone call with the resident or prospect and you want to have that action tracked. You will be required to leave a note to explain the details of your actions to close the task with phone.

Closing the Loop

Other: This option is for all other engagement methods like letters and in-person conversations. You will be required to leave a note to explain the details of your actions to close the task with other.

No Response: This option should be used when you do not want or need to respond online or note any other correspondence/action on a review/task. This can be used when a comment contains sensitive information that should not be responded to directly. You will be required to leave a note to close the task with "No Response".

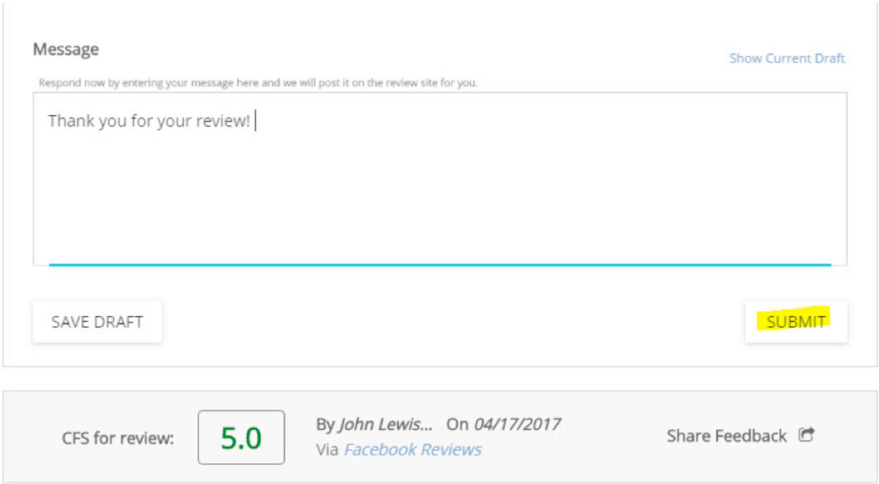


How do I close open tasks?

1. Go to **action > closing the loop**. The list of tasks assigned to you will appear.
2. Click on a **task** to **open response task window**.
3. Select your response type. (Respond Online will pre-populate which should remain if you wish to post your response online.)
4. Select from the template you'd like to use or just type your engagement in the message box. **Note:** Templates will only be applicable to the Respond Online response type.
5. The source account will be pre-populated based on the source of the review.
6. Click **submit.** The task will now be closed.
7. You can select Save Draft if you need to save your response and come back later to close the task. The status of the task will change to in-progress and your engagement draft will be saved.

Closing the Loop

Note: If you have an approver who will review your engagements. Once you hit submit, you will see a message that your engagement was sent to the approver. The status will update to **pending approval**.



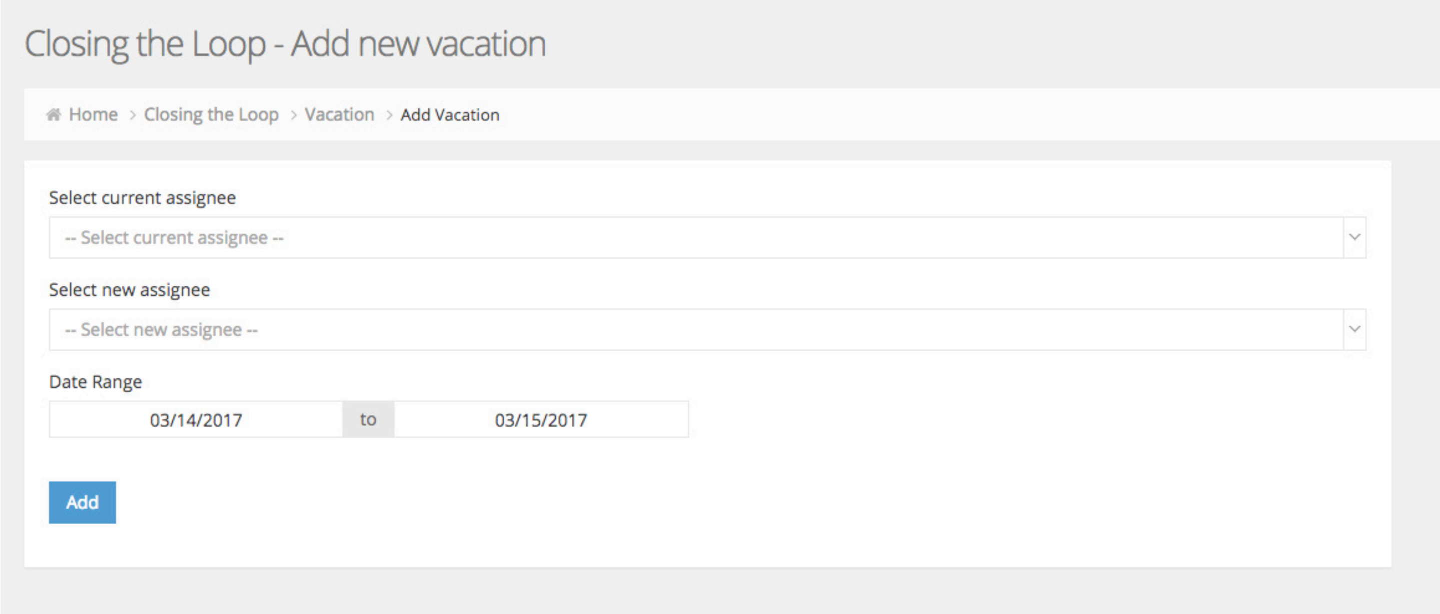
Closing the Loop

How does vacation management work?

Vacation management allows you to assign your tasks to another user while you are out of the office.

To setup vacation management:

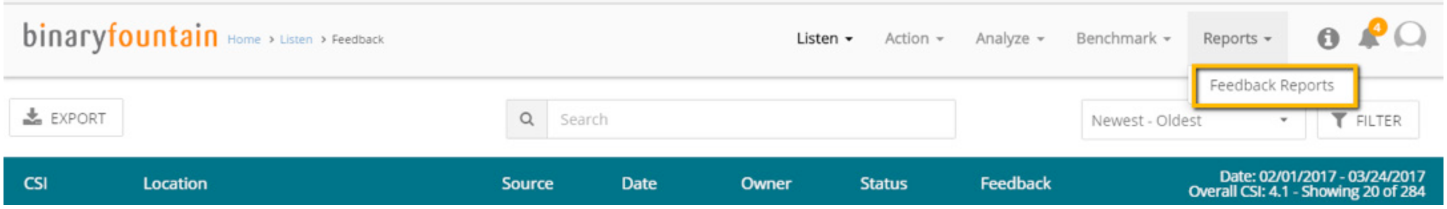
1. Click **administration** from the drop-down menu underneath the user icon in the top-right corner of the page.
2. Click **manage** on the left-hand side.
3. Click vacation management.
4. Click add vacation.
5. Select **current assignee** (e.g. either you or whoever will be out of the office for a period of time).
6. Select **new assignee** (e.g. another employee that will handle new tasks in the absence of the other employee).
7. Select the **date range** of when you or the employee will be out of the office.
8. Click **add**.



Reports

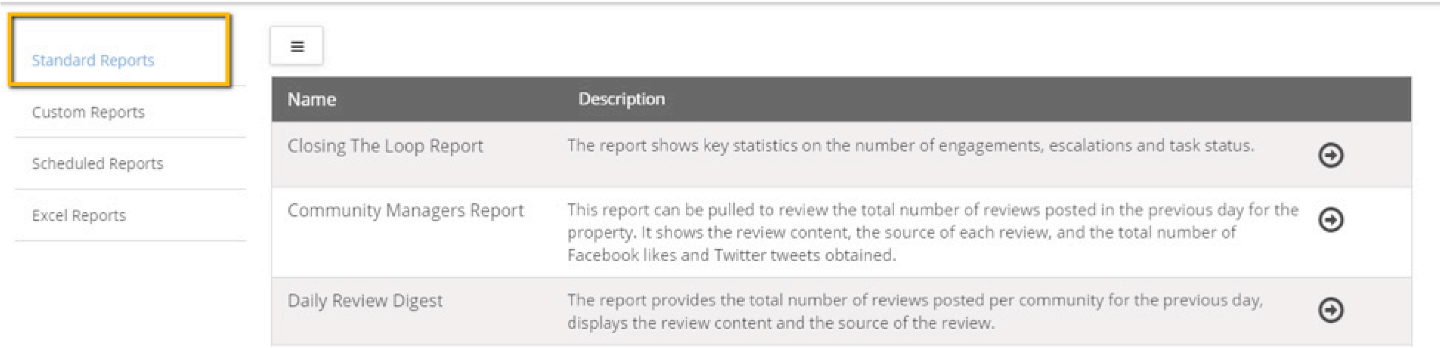
How do I get to the reports page?

To access the reports page, you must be logged into the dashboard. At the top of the dashboard select **reports** then **feedback reports**.

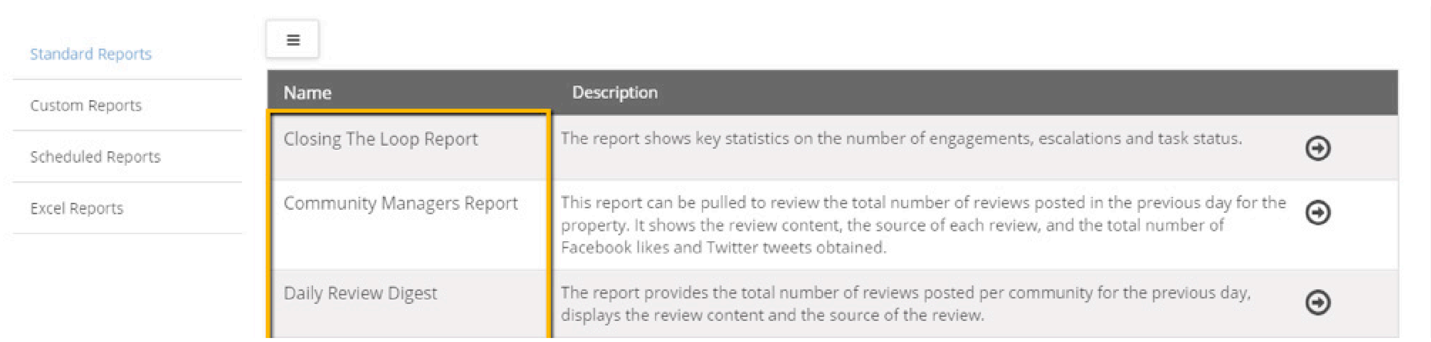


How do I schedule a report?

Reports may be scheduled for delivery by frequency and the day of the month.

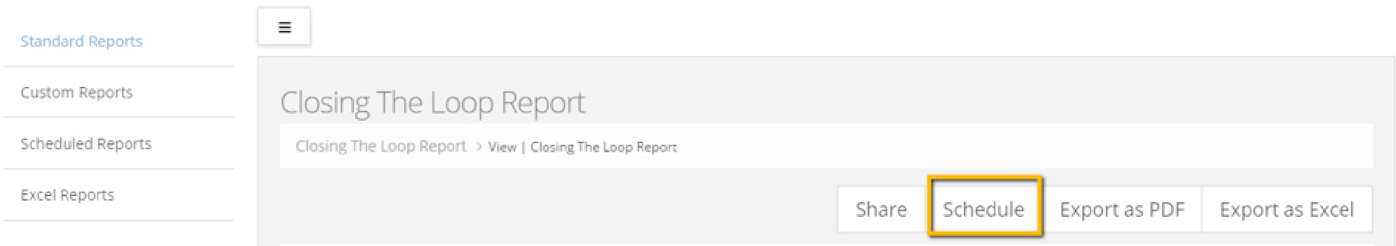


1. Click **report name** from the list of options.

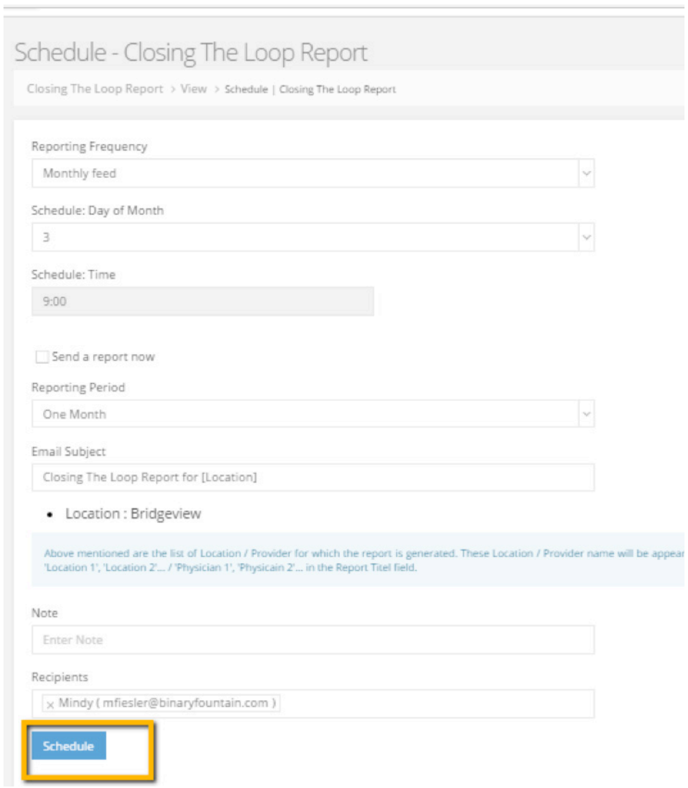


Reports

2. Choose criteria and click **generate**.
3. Click **schedule**.



4. Enter parameters for scheduling the report.
5. Click **schedule**.



Can I schedule a report for other people in the organization?

Yes, but the individual must first be set up as a user in the system before a report can be scheduled.

Reports

What are the different types of reports?

We offer a wide array of reports. The reports page in the dashboard has a brief description of each report type. We have listed our most popular reports below.

Daily Review Report: The report provides the total number of reviews posted per community for the previous day, displays the review content and the source of the review.

Overall Performance Report: This is the most comprehensive report. The report includes overall CSI scores, scores per category, 12 month trends, key statistics, and a list of all reviews and/or survey data that was pulled into the dashboard for the time period selected.

Closing the Loop Report: The report shows key statistics on the number of engagements, escalations, and task status.

Survey Report: This report shows and analysis of the number of surveys submitted as well as the CSI score over time. The report also includes an analysis of structured questions and unstructured questions.

User Activity Report: This report shows which users have logged into the platform, which users have not logged in, the number of times they have logged in, and the time spent on the dashboard.

SocialCompass

About Us

Social Compass is a leading social intelligence company that extracts operational feedback from online conversations and distills the results into actionable insights.

The company's enterprise SaaS platform, Social Compass, integrates all forms of resident feedback and leverages state-of-the-art multifamily specific natural language processing to help organizations understand and act on millions of conversations in real-time.

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