



Collect Testimonial Via Email Instructions

How to Collect a Testimonial Via Email

Here is how you can collect a Testimonial via email

Step 1:

The image shows two side-by-side "Sign In" forms. The left form is titled "Sign In" and has the subtitle "Sign in using your registered account:". It contains two input fields: "Username or Email Address" and "Password", each with a small eye icon to its right. Below these fields is a checkbox labeled "Remember me next time." and a green "Log In" button. At the bottom of the form, there are two links: "Forgot your password? click here" and "Want to create a free account? click here". The right form is also titled "Sign In" and has the subtitle "Sign in using Social Media:". It contains a "Sign in" button with a Google logo to its left, a "Sign in with Facebook" button with a Facebook logo to its left, and a "Sign in with MoxiWorks" button with a MoxiWorks logo to its left.

Step 2: Locate the left-hand navigation column, click on Testimonial.

Step 3: A drop down box will open, click on Collect

The screenshot shows the Testimonial Tree dashboard. On the left sidebar, the 'Testimonials' menu is expanded, showing options: 'Manage Testimonials', 'Add Testimonial', and 'Collect'. A black arrow points to the 'Collect' option. The main content area displays a summary of testimonials: 'Testimonials' with a count of 1 and 'Average Rating' with a count of 5. Below this is a 'Recent Testimonials' section with a 'View All' button. A sample testimonial is shown with the text 'Test'.

The Collect Testimonial Page will now open

Step 4: Click on the Send Via Email button

The screenshot shows the 'Collect Testimonial' page. The sidebar on the left is the same as in the previous screenshot. The main content area is titled 'Collect Testimonial' and contains two sections: 'Send A Request From Testimonial Tree' and 'Send A Request From Your Email'. In the first section, the 'Send Via Email' button is highlighted with a black arrow. The second section provides instructions on how to use email services to send a testimonial request and includes a sample URL: <https://testimonialtree.com/?uid=164258>. A 'Click Here to Submit a Testimonial!' link is also present.

The Send a Testimonial Request Via Email page will open

Step 5: Enter your Customer's Name, Customer's Email Address in the required fields

The screenshot shows the 'Send a Testimonial Request Via Email' form in a Zoho CRM interface. The form includes the following fields and elements:

- Your Customer's Name:** A required text field with an asterisk (*).
- Email Address of Your Customer:** A required text field with an asterisk (*).
- Your Customer's Position, Company, or their relationship to you:** A text field with a placeholder example: "(Example: Happy Customer, CEO of Coca Cola, Director of Marketing at Company XYZ, Client, etc. This will show next to your client's name if being displayed anywhere.)".
- Email Template:** A dropdown menu currently showing "Testimonial Request #1".
- Suggested Testimonial (Optional):** A large text area for optional feedback.
- Send yourself a copy:** A checkbox option.
- * Denotes a required field.** A note at the bottom left.
- Cancel** and **Send Request** buttons at the bottom.

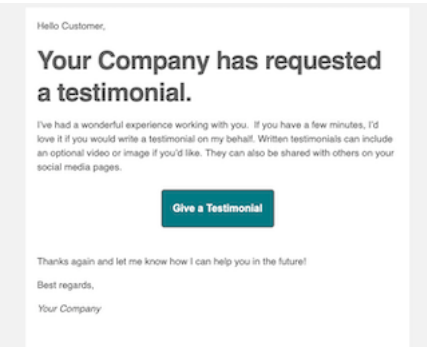
Arrows in the image point to the 'Your Customer's Name' and 'Email Address of Your Customer' fields, the 'Send yourself a copy' checkbox, and the 'Send Request' button.

Step 6: You can include the name of your Customer's company, or position, if you would like

Step 8: Check the box 'Send yourself a copy' if you would like a copy of the email you send to your customer

Step 9: Click the Send Request button in the bottom right hand side

Here is what your customers will receive:



<https://desk.zoho.com/portal/testimonialtree/en/kb/articles/collect-testimonial-via-email-instructions>