

SOP: Keying a Customer Review

Customer Service > Reviews · Oct 26, 2026 · @Ivy

Purpose

Use this SOP to give a therapist credit for a customer review (Google, Facebook, Instagram, or a compliment letter). The admin keys each review **once**, in **Customer Service > Reviews**. That one entry feeds the Sales Hub, the review incentive, payroll and HR together, so nothing is typed again anywhere else. The pictures use made-up sample staff and customers.

Who does what

Role	What they do
Admin	Keys every review with the customer's name, fixes a wrongly keyed review, and checks the Sales Hub list each month.
Manager	Looks at the Sales Hub Reviews by customer list and tells the admin if a customer is missing.
Therapist	Checks the monthly picture and tells the admin the customer's name if one of hers is missing.

Before you start

- You are signed in to the ERP with **edit** access to Customer Service, Sales Hub or Manager Hub. Without it the review is **not saved** and a red message says so.
- You have the **customer's name**, where the review was posted (Google, Facebook, Instagram, letter), the stars, and which therapist is named.

Steps

Step 1 — Open Customer Service > Reviews

Go to **Customer Service** and press the ★ **Reviews** tab. The page lists one row per therapist who is on the roster this month.

The screenshot shows the 'Reviews' page interface. At the top, there's a header with a star icon and the word 'Reviews'. Below it, a subtitle reads: 'Fast-entry grid for admin · log Google/FB/IG reviews · auto-syncs to Sales Hub leaderboard + flows to staff payroll'. To the right of the subtitle are five callouts: 1 (Month filter: 2026-10), 2 (Outlet filter: All outlets), 3 (SOP Guide button), 4 (CSV button), and 5 (Bulk Add Review button). Below the header are three summary cards: 6 (Total Reviews: 8, 2026-10 · all outlets), 7 (Absent Days: 0, 2026-10 · floor count), and 8 (Complaints: 0, 2026-10 · client cases). Below these is a 'Per-Staff Quick Keying' section with a search bar and a table. The table has columns: STAFF, OUTLET, ★ REVIEWS, QUICK + REVIEW, ABSENT, COMPLAINT, and LAST LOGGED. The table lists six therapists with their respective review counts, quick review buttons, and last logged times. Callouts 9-11 point to specific elements in the table: 9 (star +1 button), 10 (set... button), and 11 (last logged time and review link).

★ **Reviews**
Fast-entry grid for admin · log Google/FB/IG reviews · auto-syncs to Sales Hub leaderboard + flows to staff payroll

1 2026-10 2 All outlets 3 SOP Guide 4 CSV 5 Bulk Add Review

6 TOTAL REVIEWS
8
2026-10 · all outlets

7 ABSENT DAYS
0
2026-10 · floor count

8 COMPLAINTS
0
2026-10 · client cases

⚡ **Per-Staff Quick Keying**
Click ★ to add a review · changes save instantly & reflect on Sales Hub

Search staff name...

STAFF	OUTLET	★ REVIEWS	QUICK + REVIEW	ABSENT	COMPLAINT	LAST LOGGED
7 Sample Therapist D Senior Therapist · click to view audit log	Aljunied	8 1	9 ★ +1 10 set...	0	0	11 25 Oct, 12:22 pm · ★ Review
Sample Therapist F Therapist · click to view audit log	Choa Chu Kang	1	★ +1 set...	0	0	25 Oct, 6:22 am · ★ Review
Sample Therapist A Senior Therapist · click to view audit log	Cuppage	3	★ +1 set...	0	0	25 Oct, 9:22 pm · ★ Review
Sample Therapist B Therapist · click to view audit log	Cuppage	1	★ +1 set...	0	0	25 Oct, 6:22 pm · ★ Review
Sample Therapist E Therapist · click to view audit log	Eng Kong Terrace	0	★ +1 set...	0	0	—
Sample Therapist C Therapist · click to view audit log	Kovan	2	★ +1 set...	0	0	25 Oct, 3:22 pm · ★ Review

1 **Month:** reviews are keyed into the month shown here. It opens on the current month, so change it only for a review that belongs to an earlier month. 2 **Outlet** filter. 3 **SOP Guide** opens this guide. 4 **CSV** downloads the log of reviews keyed. 5 **★ Bulk Add Review** is for a whole outlet (Step 6). 6 Total reviews, absent days and complaints for the month. 7 Click a therapist's name to see her audit log (Step 4). 8 Her review count for the month. 9 ★ +1 adds one review. 10 **set...** types an exact total (Step 5). 11 When and what was last keyed for her.

Step 2 — Add one review: ★ +1

Find the therapist the customer named and press ★ +1. A box asks for the **reason**. The reason is required: it is the proof of the review.

★ Add 1 review for Sample Therapist A (Cuppage)

Reason / source REQUIRED:
(e.g. "Google review from Mrs Wong · 5★ · Hydra facial"
"FB review from Tom · 5★ · service quality"
"Direct compliment letter from Ms Lee")

Cancel OK

Type it in this order: **where** it was posted, **from** <customer name>, the **stars**, and the **service**. Write the customer's name right after the word **from**, because the Sales Hub reads the name from there. Press **OK**. The count goes up by 1 and the entry shows under **Recent entries**.

- **Good:** "Google review from Mrs Tan · 5★ · Hydra facial"
- **Not enough:** "review" or "good" (no customer name, so nobody can check it)

Step 3 — If the customer is already credited

If the same customer was already credited this month, a red message shows who keyed it and when, and asks **"Same customer already credited on ... Add anyway?"**. Press **Cancel** if it is the same review. Press **OK** only when it is truly a different review from the same customer (for example a second visit). The extra line is marked as an override in the log.

Step 4 — Check or fix a therapist's reviews (audit log)

Click the therapist's name, or her review count. A panel opens on the right with every review keyed for her this month.

AUDIT LOG · 2026-10

×

Close

Sample Therapist A

Cuppage · all reasons logged for review · absent · complaint

★ REVIEWS
3

🕒 ABSENT
0

📄 COMPLAINT
0

1 ★ REVIEW REASONS 3

+1 review 25/10/2026, 9:22:14 pm · Admin Delete 2

Google review from Mrs Tan · 5★ · Hydri 3 al

+1 review 25/10/2026, 2:22:14 pm · Admin Delete

Google review from Ms Lim · 5★ · Gel manicure

+1 review 25/10/2026, 7:22:14 am · Admin Delete

FB review from Sarah Wong · 5★ · service quality

🕒 ABSENCE RECORDS 0

No absences logged for this period.

📄 COMPLAINT CASES 0

No complaint cases linked for this period.

1 Review reasons: one line per review, with the date, time and who keyed it. **2 🗑 Delete** removes a line that was keyed wrongly (wrong therapist, wrong month, keyed twice). The count goes down by the same amount. **3** The reason you typed, so anyone can see where each review came from. Press **Close** when done.

Step 5 — Recent entries and set...

Recent Bulk Entries						
Last 30 reviews logged through this tab · click to undo						
TIME	TYPE	STAFF	OUTLET	DETAIL	BY	
25 Oct, 9:21 pm	★ Review	Sample Therapist A	Cuppage	2 Google review from Mrs Tan · 5★ · Hydra facial	Admin	undo 1
25 Oct, 6:21 pm	★ Review	Sample Therapist B	Cuppage	Google review from Mr Lee · 5★ · Lash lift	Admin	undo
25 Oct, 3:21 pm	★ Review	Sample Therapist C	Kovan	Google review from Jenny Ho · 5★ · Facial	Admin	undo
25 Oct, 2:21 pm	★ Review	Sample Therapist A	Cuppage	Google review from Ms Lim · 5★ · Gel manicure	Admin	undo
25 Oct, 12:21 pm	★ Review	Sample Therapist D	Aljunied	IG review from Amy Goh · 5★ · Nails	Admin	undo
25 Oct, 8:21 am	★ Review	Sample Therapist C	Kovan	Direct compliment letter from Ms Chan	Admin	undo
25 Oct, 7:21 am	★ Review	Sample Therapist A	Cuppage	FB review from Sarah Wong · 5★ · service quality	Admin	undo
25 Oct, 6:21 am	★ Review	Sample Therapist F	Choa Chu Kang	Google review from Mdm Teo · 5★ · Pedicure	Admin	undo

1 ↶ **undo** takes back an entry you just keyed by mistake, after a confirmation. 2 The detail is the same reason you typed. The last 30 reviews keyed through this page are listed here with the time and who keyed them.

set... next to ★ +1 types an exact total for the month. Use it only to correct a total. A review added with set... has no customer name, so it cannot be checked later. Always prefer ★ +1 with a reason.

Step 6 — Bulk Add Review (a whole outlet)

Use ★ **Bulk Add Review** only when the whole outlet shares the credit, for example a team appreciation week. It asks, one by one: the **outlet** (type its name or number), **how many reviews** to add to each therapist, and the **reason** (required). It then asks you to confirm the number of staff. Every therapist at that outlet gets the same count, and each line is marked **[BULK]** in the log. For a single customer's review, use ★ +1 instead.

Step 7 — Check the Sales Hub: Reviews by customer

Every review you key shows in **Sales Hub > ★ Reviews by customer**, grouped by outlet, with the customer's name. Do not key anything there: it only shows what the admin keyed.

1 One block per outlet with its review count. 2 Each therapist's count. 3 One chip per review with the customer's name, the stars and service, and the date. 4 Switch between **Whole month** and **One day**, and filter by outlet. 5 Move to another month. 📷 **Save picture** makes a picture to send to the staff. A therapist who is missing a customer tells the admin the name, and the admin adds it in Step 2.

What the review is worth

Each review counts on the Sales Hub, and the review incentive is **\$5 each** unless the person has a personal rate (set in Sales Hub > 👤 Staff Allocation). The same count flows into commission, payroll and HR. Nothing is keyed twice.

Checks and tips

One review, one key. Key it here only. Never also type it in the Sales Hub or in a payroll sheet.

Always name the customer. Write "from <name>" in the reason so the Sales Hub shows the name and nobody is credited twice.

Check the month. The month box at the top decides which month gets the review.

Wrong person or wrong month? Open her audit log, press 🗑 Delete on that line, then key it again on the right person or month.

Month-end check. Before payroll, open the Sales Hub list, compare it with the Google, Facebook and Instagram reviews posted that month, and key anything missing.