

Sign Up Protocol

TARGET OUTCOME

Reviewfy.io account created and activated

STEP 1 • Sign Up Page

Enter work email and secure password

STEP 2 • Google SSO Option

Alternative one-click Sign up / Sign in with Google

STEP 3 • Country Selection

Select operating region and local country

STEP 4 • Primary Goal

Specify business objectives and feedback priorities

STEP 5 • Work Profile

Tell Reviewfy about your role, industry, or organization

STEP 6 • Account Type

Choose between Individual or Organisation account structure

Create Survey: Manual Mode

TARGET OUTCOME

Custom 5-question survey ready in draft mode

STEP 1 • Navigation

Click 'Reviews' in left panel (located below Radar)

STEP 2 • Initiate Creation

Click '+ New Survey' button

STEP 3 • Survey Modal

'Create your Survey' configuration screen appears

STEP 4 • Mode Selection

Select 'Build Manually' pathway

STEP 5 • Survey Metadata

Enter the Survey Title and core details

STEP 6 • Question Design

Manually build and configure your 5 custom questions

Create Survey: AI Builder Mode

TARGET OUTCOME

AI-generated 5-question survey created & published

STEP 1 • Navigation

Click 'Reviews' in left navigation panel

STEP 2 • Initiate Creation

Click '+ New Survey' button

STEP 3 • Survey Screen

'Create your Survey' screen opens

STEP 4 • Select AI Builder

Click 'Start AI Builder'

STEP 5 • Prompt & Context

Input project context, goals, and feedback prompt

STEP 6 • Draft Generation

Reviewfy AI builds the 5-question survey; save to Draft

STEP 7 • Publish

Select 'Publish' mode to finalize survey for distribution

Survey Fine Tuning

TARGET OUTCOME

Fully branded, response-configured survey published

STEP 1 • Draft Access

Open the target survey currently in Draft state

STEP 2 • Brand Identity

Upload your organization's custom logo

STEP 3 • Question Refinement

Review, edit, or delete questions manually

STEP 4 • Visual Icons

Assign an icon to each question from the media repository

STEP 5 • Theme Styling

Choose a custom color palette for question icons

STEP 6 • Response Mapping

Define response types (Likert, rating, open-ended) per question

STEP 7 • Final Publish

Click 'Publish' to freeze changes and ready for outreach

Add Your Team

TARGET OUTCOME

Team member onboarded and permissions granted

Step 1

Team Navigation

Navigate to 'Team' management section

Step 2

Invite & Role

Enter teammate email and assign appropriate access role

Step 3

Email Notification

Teammate receives an automated invitation email

Step 4

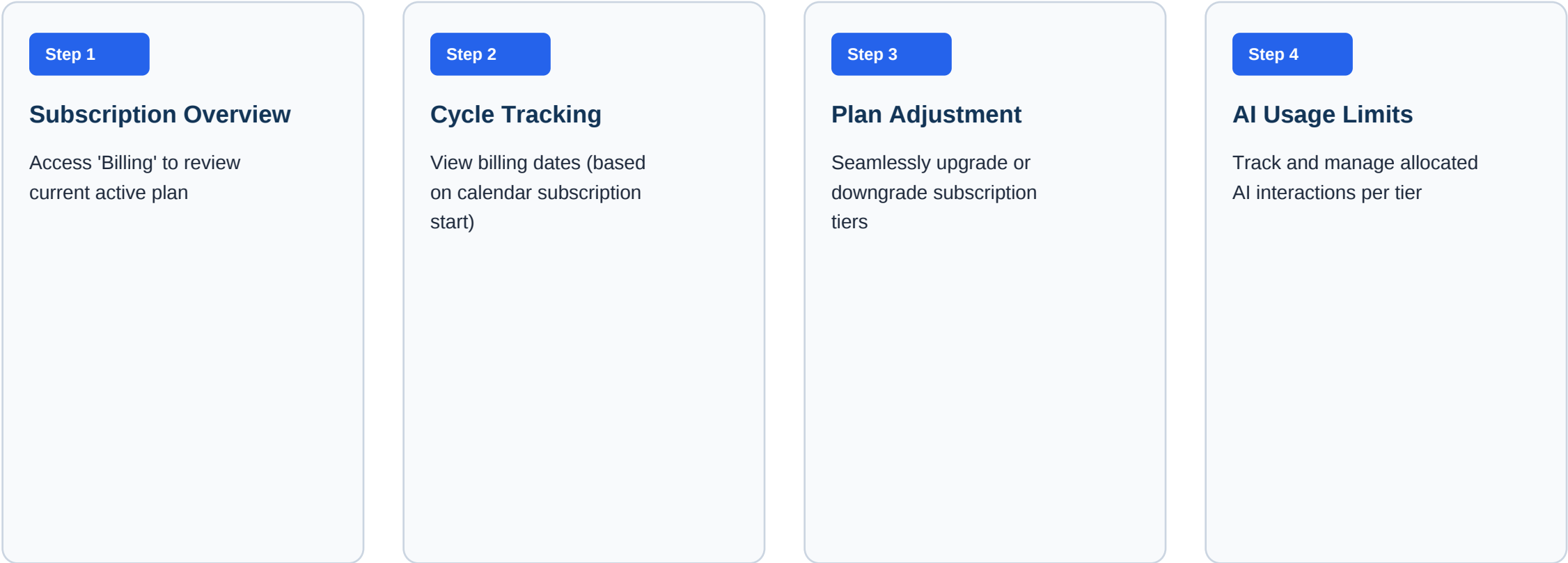
Acceptance & Access

Invitee clicks link, accepts invite, and accesses workspace

Billing & Subscriptions

TARGET OUTCOME

Active subscription tier aligned with survey needs



Pre-Dispatch Checklist

TARGET OUTCOME

Verified sender settings & live preview ready for delivery

STEP 1 • Reach Navigation

Click 'Reach' in the primary dashboard navigation

STEP 2 • SMTP Configuration

Configure custom SMTP settings or Reviewfy sender details

STEP 3 • Survey Selection

Select the published survey to dispatch

STEP 4 • Quota Verification

Check subscription delivery limits if using Reviewfy email

STEP 5 • Channel Choice

Select distribution channels (Email, QR Code, Direct URL)

STEP 6 • Live Preview Check

Inspect interactive survey form preview in the right panel

Reports & Analytics

TARGET OUTCOME

Comprehensive analytics & respondent breakdown

STEP 1 • Filter & Scope

Select target survey and adjust time scale filter (right panel)

STEP 2 • Executive Overview

Review high-level response metrics, aggregate NPS, and scores

STEP 3 • Funnel Visuals

Inspect daily submission trends and completion funnel rates

STEP 4 • Question Drilldown

Analyze response distributions for each individual question

STEP 5 • Raw Submissions

Click 'View All Responses' for granular itemized data

Create a Project

TARGET OUTCOME

New organized project folder established

Step 1

Initiate Project

Click 'New Project' button
in the top corner

Step 2

Project Identity

Assign a clear,
descriptive project name

Step 3

Project Scope

Provide a brief
description of project
scope and goals

Step 4

Access Level

Set project visibility to
Public (workspace-wide) or
Private

Dispatch Survey Form

TARGET OUTCOME

Surveys distributed across respondents with tracking active

STEP 1 • Direct Input

Option 1: Manually enter single respondent email addresses

STEP 2 • Bulk Import

Option 2: Upload respondent contact database via CSV format

STEP 3 • Project Email Hub

Navigate to Email Section under 'All Projects'

STEP 4 • Survey Mapping

Confirm selection of the target survey for this campaign

STEP 5 • Launch Delivery

Return to 'Reach' module and click 'Send Invitations'

STEP 6 • Omnichannel Share

Generate and share dynamic QR code or direct survey URL