Feedback & Issues

10/29/2025 3:39 pm CDT

Overview

Feedback & Issue Management is an add-on feature. To purchase this, go to MarketPlace. Please note that not all Users can access the market place section of service**minder**. If you are a franchise owner, your brand may subscribe to this feature for all organizations

This feature is all about providing customer care, creating a premium customer experience, and managing issues all in one place - so nothing and nobody "falls through the cracks."

This article will review:

- Settings and Navigation
- About Feedback
- Feedback Email Templates
- Feedback Drip Trigger
- Issue Management Grid
- Tracking and Reporting
- FAQs

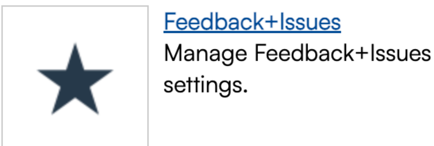
Settings and Navigation

To grant a user access to Feedback and Issues, you will find individual user-level permissions in **Control Panel > User > Permissions** > look for settings around **Feedback**. Depending on permissions, a user will see either ALL issues or just the issues assigned to them. Owner/Organization Admins will have full access.

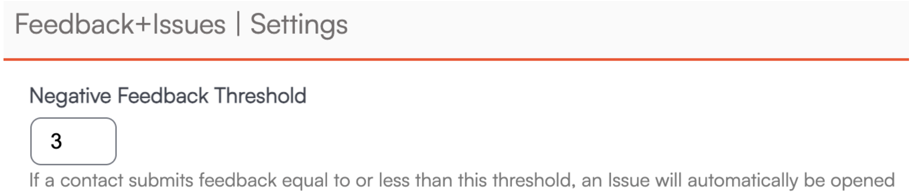
To enable notifications **Control Panel > Notifications**, look for the following notifications that you can enable:

- **Feedback Received:** You can enable this notification for Contacts.
- **Feedback Requested:** You can enable this notification for Users.

The main controls for the Feedback module is in **Control Panel > Feedback + Issues**.

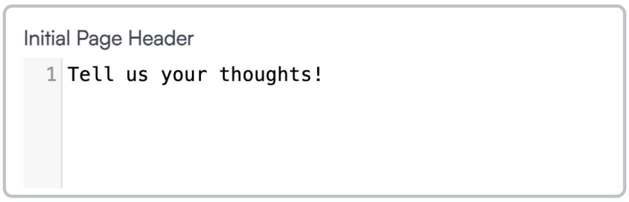


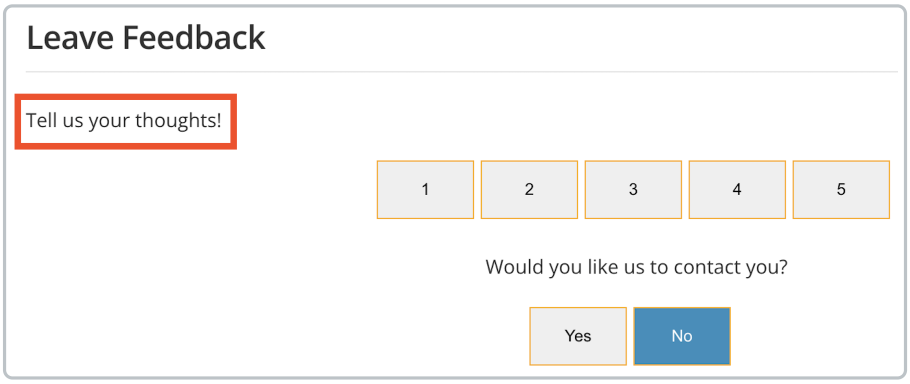
Here you can set the threshold for the rating (1-5) at which you would like an alert. Any score equal to or less than this value will create an alert and open an **Issue**.



Also in this section is where a user selects what services to trigger Feedback when an appointment for that service completes. Additionally, if the organization uses our tips/gratuities feature, services where tips are solicited (in the Feedback message) can be selected.

The "Header" section allows you to customize the verbiage on the Ranking URL page, that is, where the customer can rank the agent and add comments.





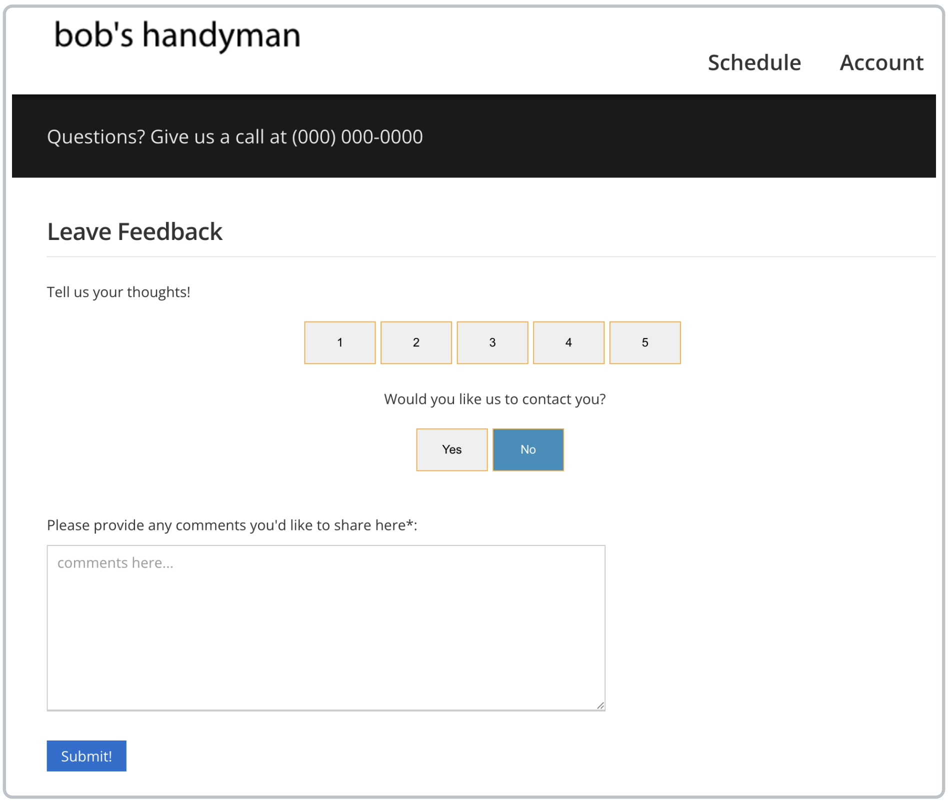
About Feedback

Feedback is a triggered email or text sent after selected services are completed, asking customers to rate their experience on a scale of 1–5.

Customers click the link in the request to access the feedback form, where they can:

- Provide a rating and comments
- Request a call back
- Leave a tip (if enabled)

This is for rating agent performance internally and ***does not*** push to Google Reviews or any other review site.



Feedback Email Templates

Two Feedback email templates are located in **Control Panel > Automated Email Templates**:

1. **Feedback Request -** Sent to all customers (based on the service they received) asking, "How was your experience working with us?"

2. **Feedback Followup Request** - Sent to customers after a negative review was addressed, asking “We’ve resolved your problem, will you give us a new rating?”

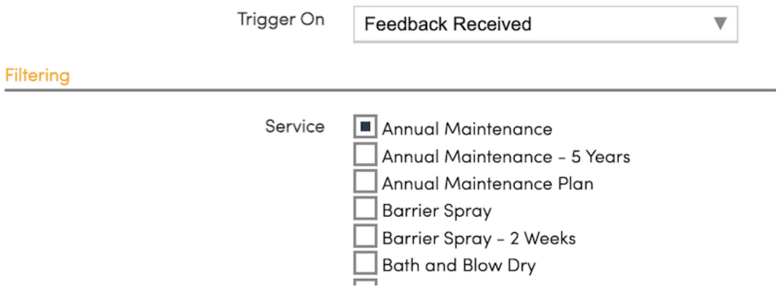
These email templates can be used in conjunction with Drip Triggers and Drip Campaigns if you utilize that Add-On feature.

> These emails are visible to all organizations, even if the org has not purchased Feedback+Issues as a Feature Add-On. We cannot hide it for specific locations or brands. If this email is sent without the Feedback+Issues add-on, nothing will happen. The customer will not be directed to the ranking page.

Feedback Drip Trigger

If you use Drip Triggers and Drip Campaigns, you’ll see the option to trigger actions based on **Feedback Received**.

When creating a trigger or campaign, you can filter by Service or Feedback ranking to narrow down when the action fires. For example, you could restrict the drip trigger to fire only when rating of 5 is given, then set it to send a follow-up email prompting the customer to post a public review.



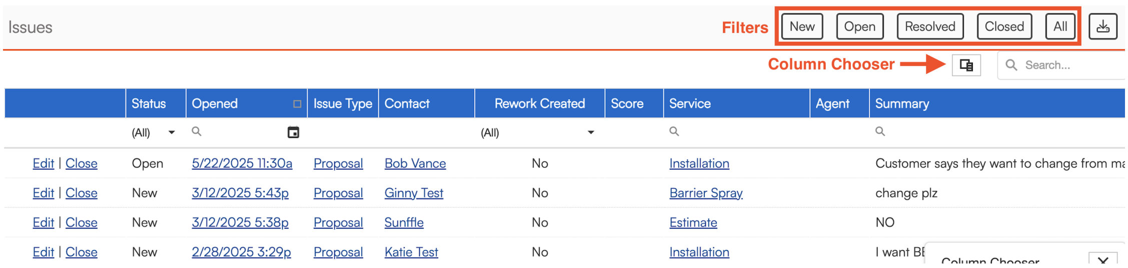
Even if you have not purchased the Feedback module as a Feature Add-On, you will still see this trigger. If you attempt to use it, nothing will happen if you have not purchased the add-on.

Issue Management Grid

The **Issue Management Grid is** found in the left-hand side Navigation Panel under Snapshots. This grid displays all issues flagged by Feedback or created manually. Issues can have the following statuses: **New, Open, Resolved,** or **Closed**.

In the top menu of the Issues page, you can:

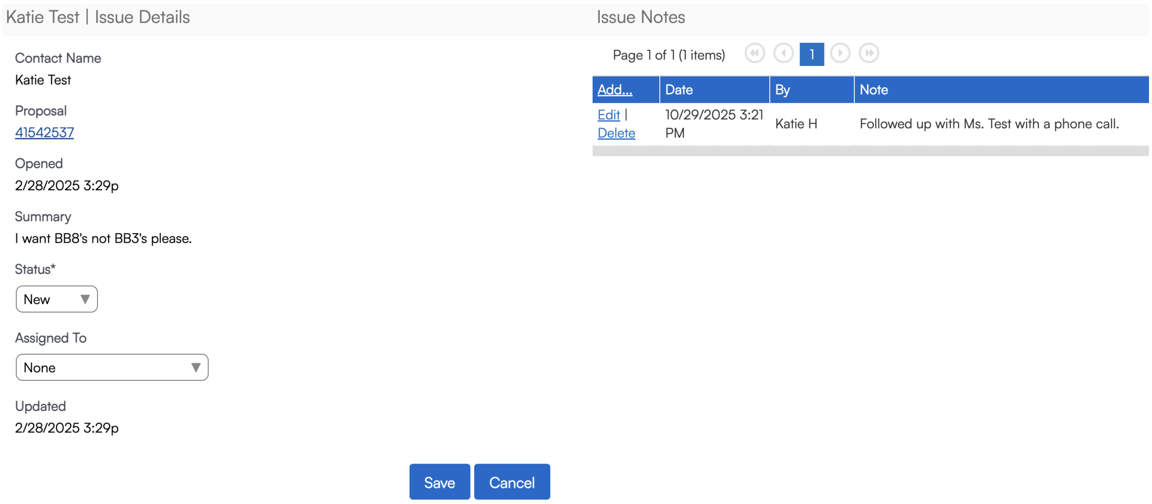
- Filter issues by status (e.g., Resolved)
- Download a full list of issues
- Select which columns you want to display on the grid



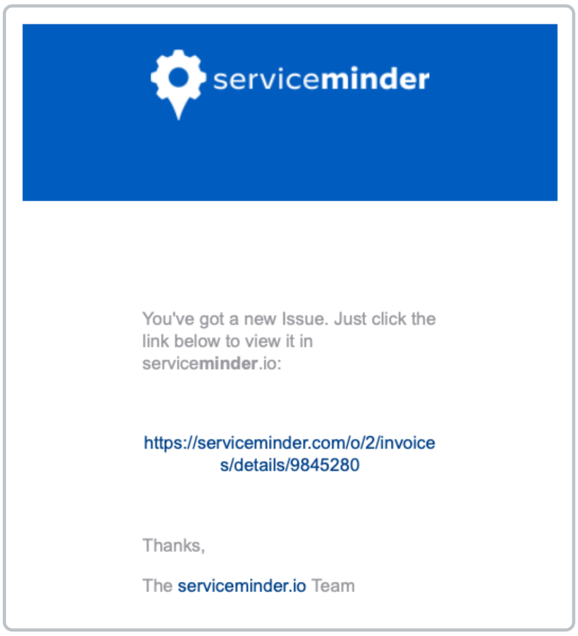
Add and Edit an Issue

Click on the "Opened" date/time link to edit and add notes to an issue. Status will never automatically change. The statuses are "New," "Open," "Resolved" and "Closed."

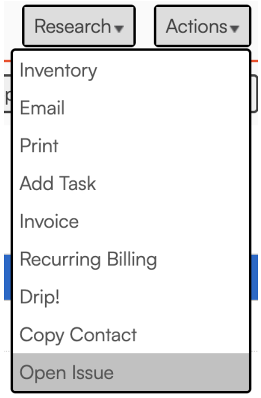
"Edit" also allows you change the status and review the comment/description.



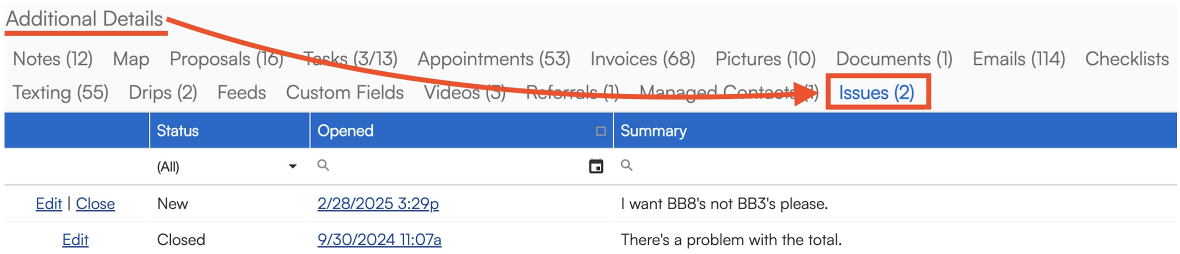
When an issue is assigned, the assignee receives an email notification if that setting is enabled.



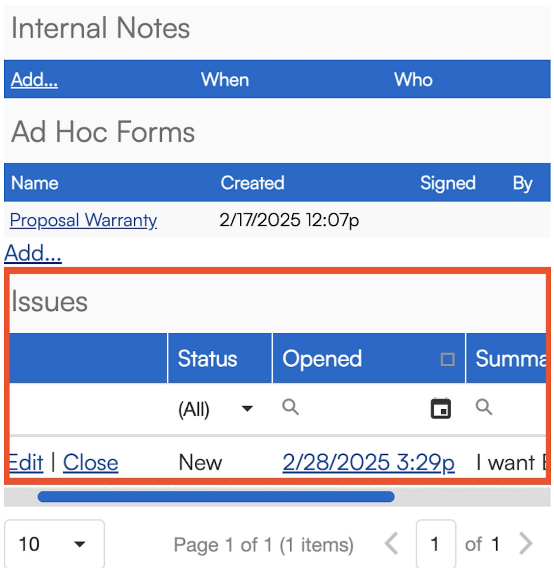
In addition to feedback-triggered issues, users can manually create new issues from the Action menu on any **Contact, Appointment, Invoice,** or **Proposal** page. Unlike customer feedback comments, these manually added issue comments *can* be edited with proper permissions.



All Issues connected to a Contact appear in the **Additional Details** section under the **Issues** tab.



If an individual Proposal, Invoice or Appointment has an issue attached to it, those will appear along the side as well.

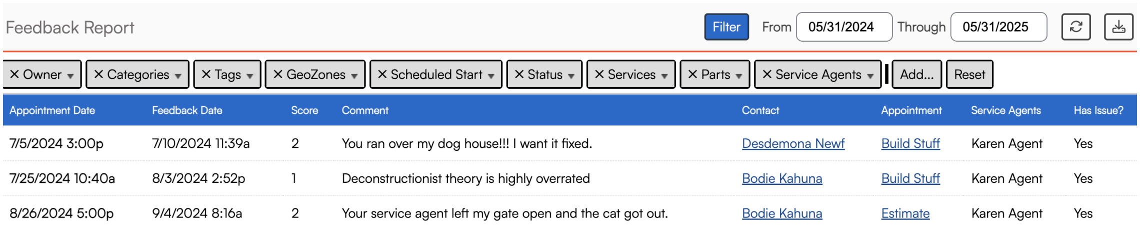


Tracking and Reporting

All ratings, the good, the bad and the ugly, are found in the **Feedback Report**, located in the Reports section. It details the following information:

- Appointment Date
- Feedback Date
- Score given by customer
- Comment

- Contact
- Associated Appointment
- Service Agents assigned to the appointment
- Has issue? (Yes = score was below the Negative Feedback Threshold)



Appointment Date	Feedback Date	Score	Comment	Contact	Appointment	Service Agents	Has Issue?
7/5/2024 3:00p	7/10/2024 11:39a	2	You ran over my dog house!!! I want it fixed.	Desdemona Newf	Build Stuff	Karen Agent	Yes
7/25/2024 10:40a	8/3/2024 2:52p	1	Deconstructionist theory is highly overrated	Bodie Kahuna	Build Stuff	Karen Agent	Yes
8/26/2024 5:00p	9/4/2024 8:16a	2	Your service agent left my gate open and the cat got out.	Bodie Kahuna	Estimate	Karen Agent	Yes

You can filter by Agent or Date as well as other data points (i.e., contact categories, appointment status, service agents, etc.). This report is also downloadable to a .csv file.

> If you schedule jobs with Teams (not individual agents), then Feedback will be tied to the "lead agent". You may choose to schedule an "equipment" type service agent as your lead agent, i.e. Van 1, Van 2, so it will be clear that the Feedback is for a Team, overall.

FAQs

If the issue is Resolved or Closed, it disappears from the grid. Is there a way I can see old issue?

Yes, you can still see resolved and closed issues on the individual Contact's Details page under the tab "Issues", and by using the grid filters.