Feedback +Issues

10/24/2024 4:14 pm CDT

Overview

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."



Video Tutorial

(Coming soon!)

Settings and Navigation

The main controls for the Feedback module is in **Control Panel > Feedback**. Here you can set the threshold for the rating (1-5) at which you would like an alert. 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.

	Feedback+Issues Manage Feedback+Issues settings.
Feedback Page Setting	S
Negative Feedback Threshold	3
Request Feedback On	If a contact submits feedback equal to or less than this threshold, an Issue will automatically be opened All Annual Maintenance Assuel Maintenance

You will find individual user-level permissions in **Control Panel > User > Permissions** > look for settings around **Feedback**.

In the Notification tab, look for Feedback Received to turn off/on. This setting is default to off.

The "Header" section will substitute whatever you put in here for the verbiage on the Ranking URL page, that is, where the customer can rank the agent and add comments.

Feedback

Feedback is a triggered email/text for selected services, requesting feedback (on a scale of 1-5) after an appointment is completed. The Organization owner/admin will be able to set a "threshold" feedback number (say, 3 or less) to flag this customer and create an Issue when the ranking is low.

By clicking on the link provided, the customer is directed to a URL, where feedback is captured:

bob's handyman	Home	Portfolio	Blog	Schedule	Account
Questions? Give us a call at (860) 78	36-4121				
Leave Feedback					
Thanks so much for having Bob's Handyman - appreciate your business!	Plano out to help v	with your Honey Ba	dger Remova	l on Wed, Apr 24, 20	24. We
If you have a moment, please give us feedback satisfied and "1" being very dissatisfied with th	on the work perfo e job done. 2	ormed by Karen Libł	by, your servi	ce technician, with '	5" being very very
	Would you like	e us to contact you? No			
	Would you	like to leave a tip?			
	Yes	No			
Please provide any comments you'd like to sha	re here*:				
comments here					

The Feedback request also allows for Comments, a "Do you want a call back?" and the ability to leave a tip (if your Org has tip functionality enabled.) If a customer leaves a comment, that comment may not be edited by a user.

Issue Management Grid

The **Issue Management Grid is** found in the left-hand side Navigation Panel under Snapshots. The Issues Grid is where these flagged rankings live. The grid is meant to be managed manually, with various statuses assigned to an Issue such as **New, Open, Resolved,** and **Closed**.



A User can create an issue directly from the screen of a Contact, an Invoice, a Proposal or an Appointment. All of these issues will appear on the Issues Grid.

In the top menu of the Issues page, you can filter by the status of the tickets (Resolved for instance). Or **Download** the full list of issues.

sues				S	ort —	New	Open Resolved C	losed All Downlo	bod
						Column		Q. Search	
	Status	Issue Type	Contact	Rework Created	Created At	1 -	Service	Agent	
	(All)	•		(All)	• Q			Q	
Edit Close	New	Invoice	Bodie Kahuna	No	4/11/2024	02:29:49 PM			
Edit Close	New	Appointment	Desdemona Newf	No	4/11/2024	02:23:26 PM	Honey Badger Removal	Karen Libby	
Edit Close	New	Invoice	Bodie Kahuna	No	4/8/2024	01:43:00 PM			
Edit Close	New	Appointment	Desdemona Newf	No	4/8/2024	01:40:28 PM	Honey Badger Removal	Karen Libby	

Clicking the three dots on the far right of an issue allows a drop down to quickly display the details of that issue.

Edit Close	New	Appointment	Desdemona Newf	No	4/11/2024 02:23:26 PM	Honey Badger Removal	Karen Libby	•••
Summary:	You stole my chev	w bone. Give it back						
Updated At:	4/11/2024 02:23:2	26 PM				-		
Score:	2							

When an Issue status is changed to **Resolved**, you'll get a pop-up asking if you'd like to send a follow-up Feedback request (optional.) This is a separate email and URL. This way, an Organization can find out how satisfied a customer is with the resolution of an issue.

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.

Bob Vance Issue Detail	Issue Notes				
Contact Name	Page 1 of 1 (1 items) (4) (5) (5) (5)				
Proposal	38131089	<u>Add</u>	Date	Ву	Note
Opened	9/4/2024 8:29a	Edit	9/22/2024 4:08	Karen Libby	Notes added here
Summary	I want to move forward , but want 45w bulbs instead	<u>Delete</u>	PM	noren cloby	
Status*	New V				
Assigned To	None 🔻				
Updated	9/4/2024 8:29a				
	Save Cancel				

An Issue may also be "assigned" to another user. In User permissions, the ability to view all Issues or just "Assigned to Me" issues can be set. When a user is assigned an issue, they will receive a notification (email) if that setting is turned on for that user.



Depending on permissions, a user will see either ALL issues or just the issues assigned to them. Owner/Franchise Admin will have full access.

Feedback rankings are not the only way to create issues! From a Contact, Appointment, Invoice or Proposal page, a user will see the option in the bottom blue menu to "Open Issue", meaning create a new Issue, manually. These show up on the issues grid along with Feedback-related issues. The comments here MAY be edited by a user (unlike customer feedback comments) with proper permissions.



All Issues connected to a Contact appear on the side panel under "Issues". If an individual Proposal, Invoice or Appointment has an issue attached to it, those will appear along the side as well.

Contact	Proposal Schedule Merge Edit Delete	Additional Det	tails		Research v Timeline
Name Nickname Phone Email	Bodie Kahuna Woody (805) 204-1325 (Mobile) <u>Send Text</u> <u> bbykaren@gmail.com</u> Email must be unique for account invites	Map Notes (6) Appointments (60) Tasks (23/31) Dr	Proposals (26) Invoices (45) ips (9) Feeds	Emails (134) Refe Pictures (24) Vide Checklists (1) Asse	errals (1) Texting tos Documents (6) tts (4) Issues (8)
Last Communication Last Touch	Emailed on Wed, Apr 24, 2024 at 8:46a 12/27/2023 11:16a		Status (All)	Created At	Summary
Service Address	1452 E Plano Pkwy Plano, TX 75074 ✔ <u>Copy</u>	Edit	Resolved New	4/24/2024 11:14	1:37 AM You put a hole in my d
County	Collin County	Edit Close		4/11/2024 02:25	9:49 PM Blandsays he gave \$1
Drive	15 mins (10.1 mi)	Edit Close	New	4/8/2024 01:43	:00 PM Bodie gave installer \$1
GeoZones		Edit Close	New	4/5/2024 01:08	:48 PM Bodie's upset because
Named Tax Rate	Collin County-Plano-TX 2	Edit Close	New	4/5/2024 10:20	:33 AM You didn't charge eno
Category	Customer	Edit Close	New	4/5/2024 10:19	:40 AM Sprayed the wrong pl
Lead Source	Renerral - Existing Customer Carpet Cleaning, Holiday Lighting, Other, Spring Text Blast 2024	Edit Close	Open	4/3/2024 04:19	:49 PM Wants to do a change
Tags		Edit Close	New	4/3/2024 04:19	:03 PM Bodie called angry - s

		209900		
	Margins			Edit
en	Subtotal			\$2,115.00
99 124	Materials			\$551.07
24	Labor			\$0.00
<u>ine</u> urs	Expenses			\$0.00
ard	<u>Add</u>			
	Margin			74 %
_	Internal Note	es		
	<u>Add</u>	When	Who	
	Ad Hoc Form	าร		
'	Name Cre	ated	Signed	By
ſ	lssues			
		Status	Created At	▼ Summ
		(🔻	Q	. a
	Edit Close	Open	9/10/2024 12:58:0)3 PM I woul
			_	
	10 👻	Page 1 of	1 (1 items) 🔍	1 of 1 >
,	Audits			

Request Feedback Email(s)

There are two Feedback emails located in **Control Panel > Automated Email Templates**. One is the initial feedback request, the second is meant for "We've resolved your problem, so will you give us a new rating?" As with all email templates, an organization may edit at will. These 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 utilize Drip campaigns and triggers, you will see the option to trigger on **Feedback Received**. You can also select by specific Service and filter by ranking. This allows an Organization to create drip campaigns and actions based on a Feedback ranking.

	Trigger On	Feedback Received	
Filtering			
	Service	 Annual Maintenance Annual Maintenance - 5 Years Annual Maintenance Plan Barrier Spray Barrier Spray - 2 Weeks 	

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.

This is for rating agent performance internally and *does not* push to Google Reviews or any other review site. One can, however, use the **Drips Trigger** to prompt a happy customer to post a positive review.

Tracking and Reporting

All ratings, the good, the bad and the ugly, are found in the Feedback report, located in the Reports section in the top blue menu. The "Score" is the Agent ranking given by the customer.

Feedback Re	Feedback Report			Filter From 03/25/2024 Through 04/25/2024				
Appointment Date	Feedback Date	Score	Comment	Contact	Appointment	Service Agents	Has Issue?	
4/1/2024 1:45p	4/1/2024 1:46p	2	The honey badgers are still here. In fact, three more have moved in.	Desdemona Newf	Honey Badger Removal	Karen Libby	Yes	
4/1/2024 2:00p	4/1/2024 2:10p	3	It was okay, but more honey badgers are arriving by Uber	Desdemona Newf	Honey Badger Removal	Karen Libby	Yes	
4/1/2024 2:00p	4/2/2024 12:09p	2	You ran over my dog	Desdemona Newf	Honey Badger Removal	Karen Libby	Yes	

You can filter by Agent or Date as well as other data points. 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.