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."

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

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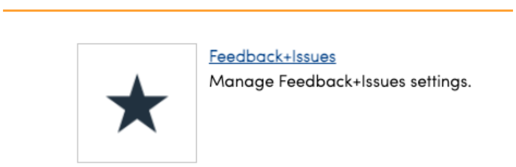
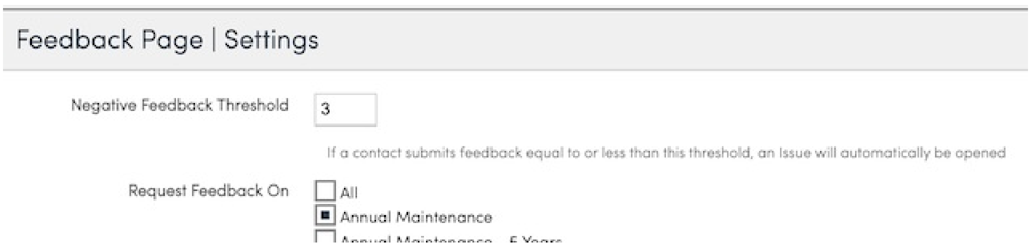
Video Tutorial

(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.





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

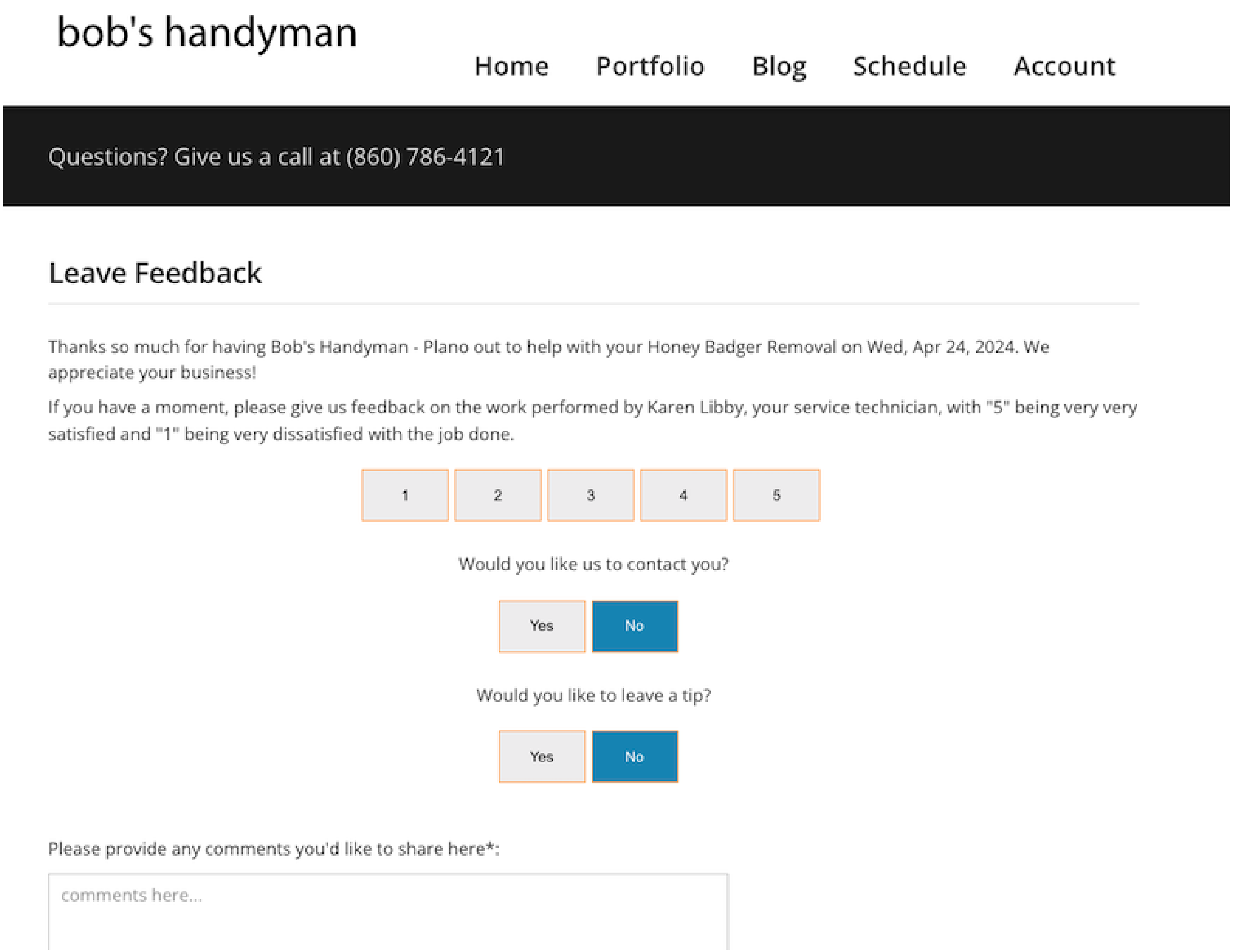
In the **Notification** tab, look for **Feedback Received** to turn off/on. This setting is default to off.

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:



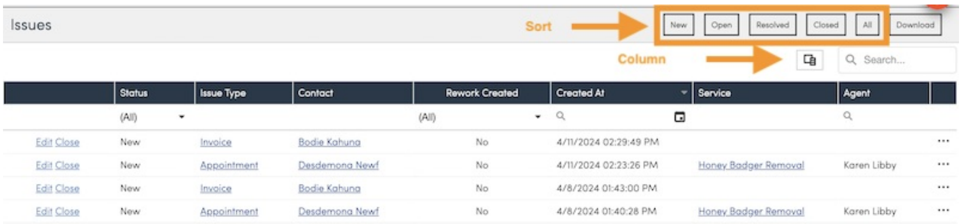
The Feedback request also allows for Comments, a "Do you want a call back?" and the ability to leave a tip (if your Org has tip functionality enabled.) If a customer leaves a comment, that comment may not be edited by a user.

Issue Management Grid

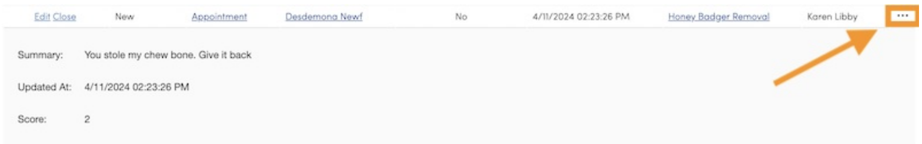
The **Issue Management Grid is** found in the left-hand side Navigation Panel under Snapshots. The Issues Grid is where these flagged rankings live. The grid is meant to be managed manually, with various statuses assigned to an Issue such as **New, Open, Resolved,** and **Closed**.

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.



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

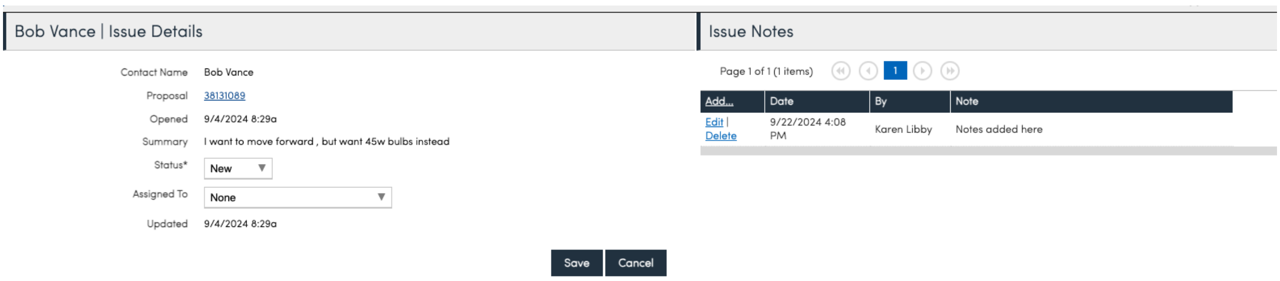


When an Issue status is changed to **Resolved**, you'll get a pop-up asking if you'd like to send a follow-up Feedback request (optional.) This is a separate email and URL. This way, an Organization can find out how satisfied a customer is with the resolution of an issue.

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.



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.

serviceminder

You've got a new Issue. Just click the link below to view it in serviceminder.io:

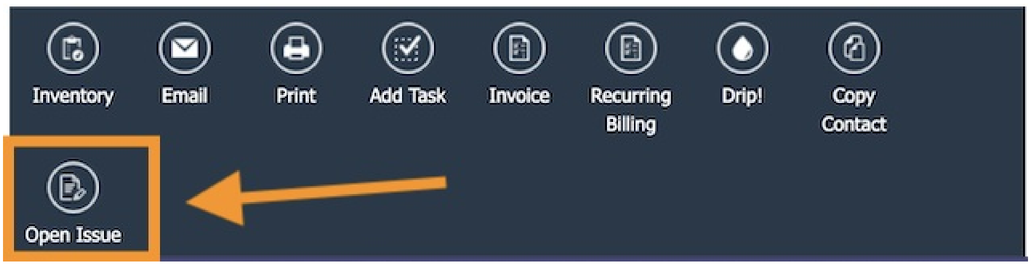
https://serviceminder.com/o/2/invoices/details/9845280

Thanks,

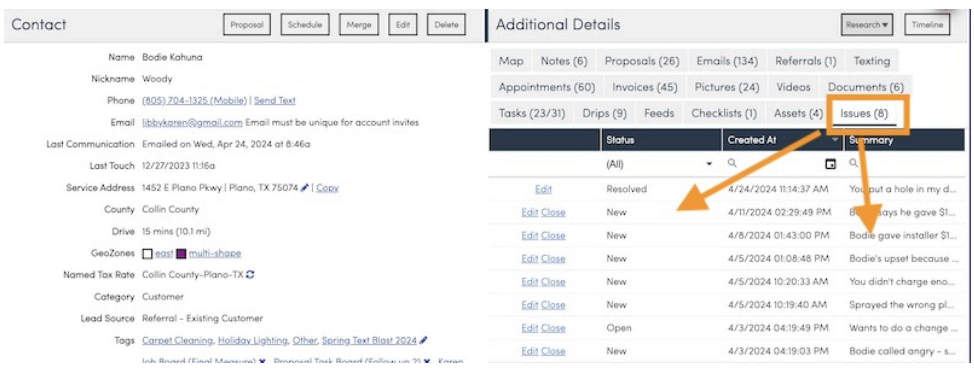
The serviceminder.io Team

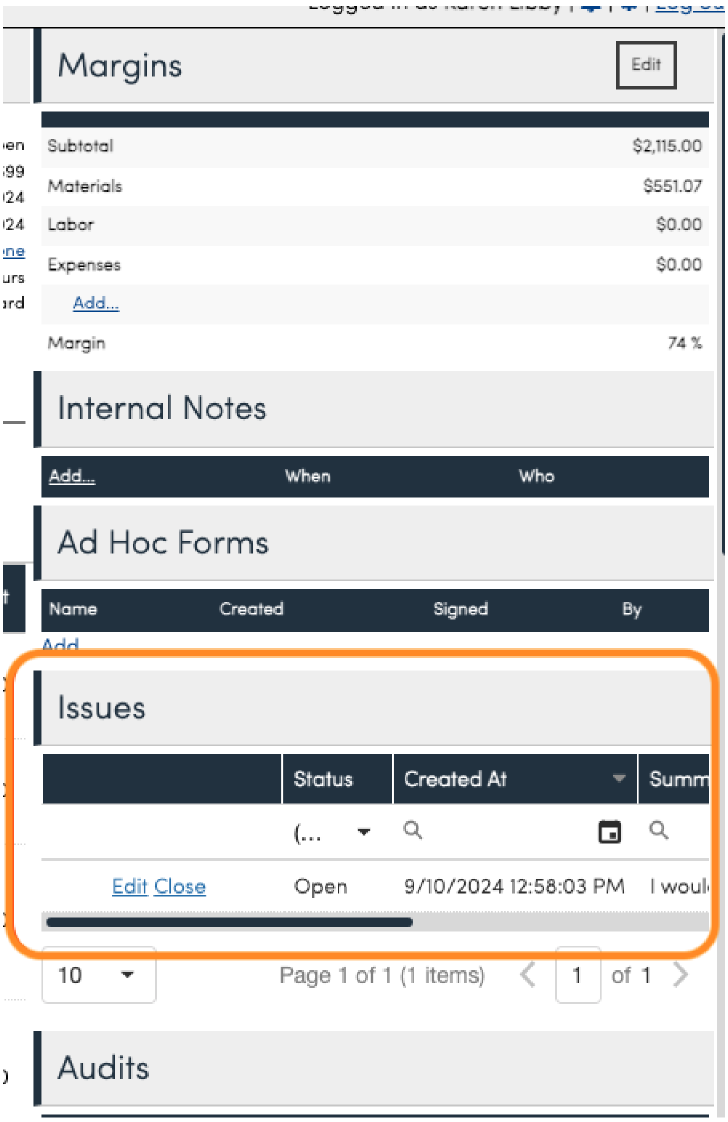
Depending on permissions, a user will see either ALL issues or just the issues assigned to them. Owner/Franchise Admin will have full access.

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.



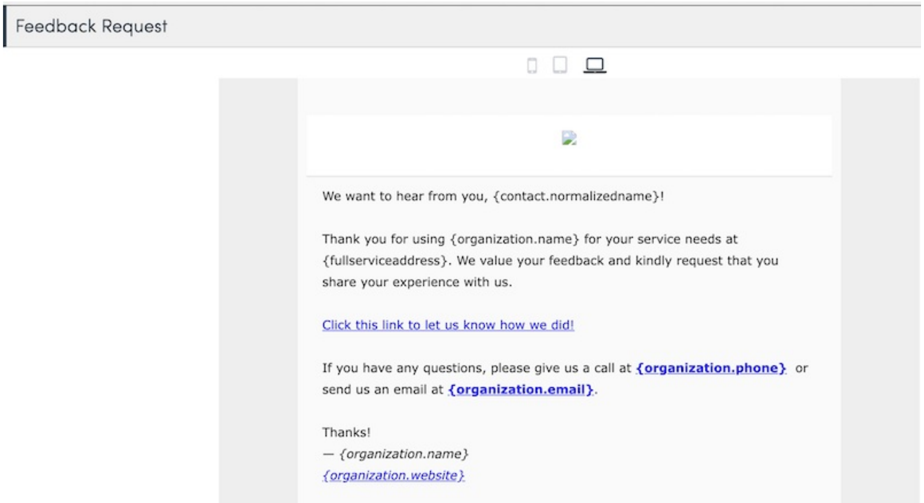
All Issues connected to a Contact appear on the side panel under "Issues". If an individual Proposal, Invoice or Appointment has an issue attached to it, those will appear along the side as well.

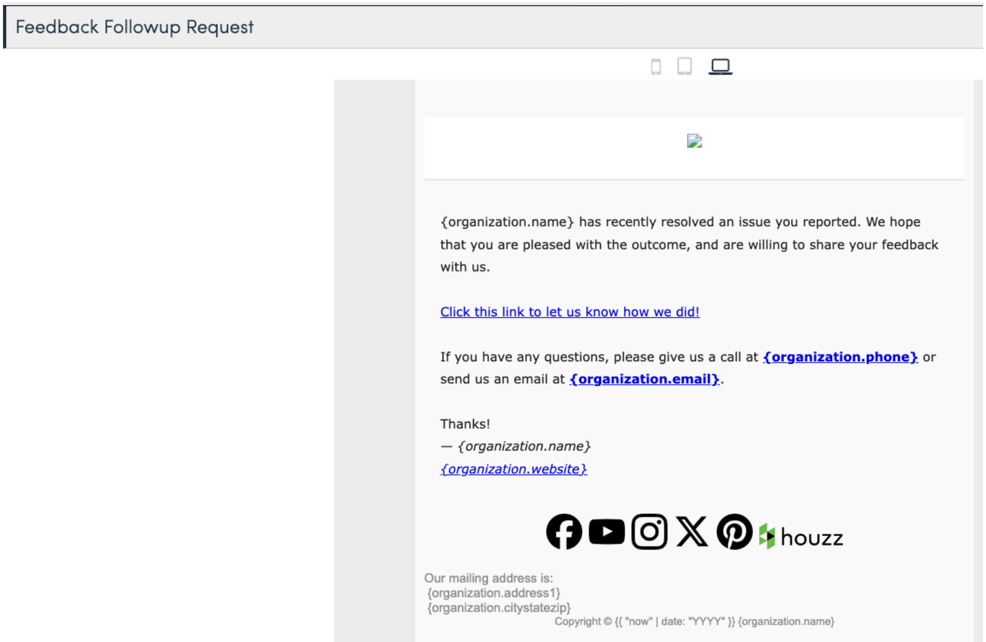




Request Feedback Email(s)

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.

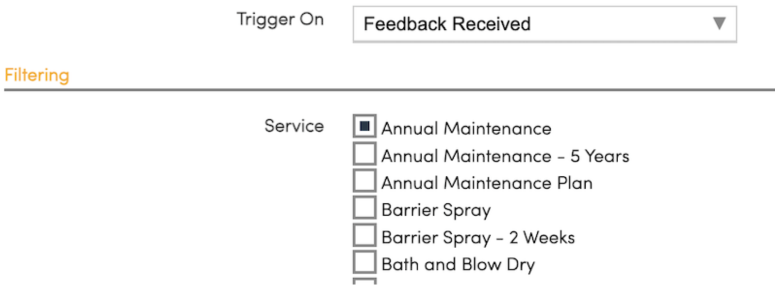




These emails are visible to all organizations, even if the org has not purchased Feedback+Issues as a Feature Add-On. We cannot hide it for specific locations or brands. If this email is sent without the Feedback+Issues add-on, nothing will happen. The customer will not be directed to the ranking page.

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.

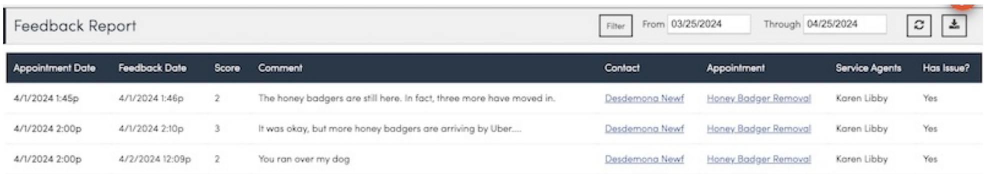


Even if you have not purchased the Feedback module as a Feature Add-On, you will still see this trigger. If you attempt to use it, nothing will happen if you have not purchased the add-on.

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.



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.