Customer Satisfaction

You can collect customer's feedback regarding their satisfaction of your service.

Go to HelpDesk Administration menu/ Customer Satisfaction.
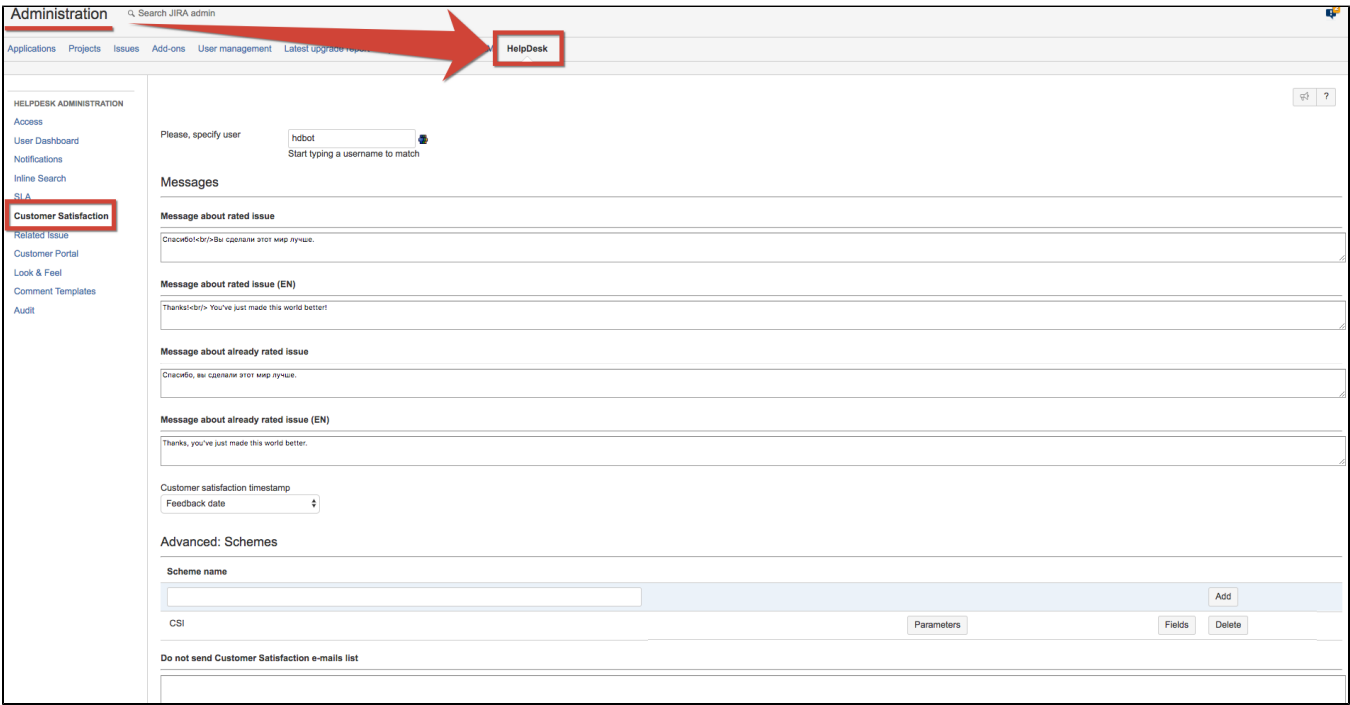
User

Specify user with administrators permissions on behalf of whom issues will be edited with survey's results.

Messages

Input messages which will be shown to users after completing the survey:

Field	Description
Message about rated issue	Create a message for users to be shown after the survey is finished on system's default language
Message about rated issue (EN)	Create a message for users to be shown after the survey is finished on English (is sent to users who's profile language is not system's default language)
Message about already rated issue	If the issue is already rated and rating fields were not discarded by post-function during transaction, this message is shown to user on system's default language

Message about already rated issue (EN)	If the issue is already rated and rating fields were not discarded by post-function during transaction, this message is shown to user on on English (for users who's profile language is not system's default language)

Customer Satisfaction Timestamp

To add the field with the date when customer answered the survey select Date or Date TIme custom field from the dropdown in HelpDesk administrator menu / Customer Satisfaction:

Message about already rated issue (EN)

Thanks, you've already made this world better.

Customer satisfaction timestamp

CSI Date time ▲▼

Advanced: Schemes

Scheme name

This field will be filled in automatically in the Dates section at the right when the customer leaves the feedback.

People

Assignee	Dmitri Abrosov
Reporter	jiratst test (test)
Votes:	0 Vote for this issue
Watchers:	1 Stop watching this issue

Dates

Created	03/Apr/18 2:23 PM
Updated	05/Apr/18 4:57 PM
CSI Date time	05/Apr/18 4:34 PM

Advanced

Custom Fields

Create custom fields to store the results of customer's feedback. These fields could be Select List (single choice) type for one mark rating and Text or HTML types for comments. If you have several ratings create custom fields for each of them. Add those fields to the scheme in HelpDesk administration / Customer Satisfaction, then use this scheme in Post-Function 'Sending Feedback to Reporter'.

In configuration of Select List (single choice) field create options which would be the marks (it could be numeric rating or text like 'excellent', 'good', 'bad' - whatever you want):

Configure Custom Field: Feedback

Below are the Custom Field Configuration schemes for this custom field. Schemes are applicable for various issues types in a particular context. You can configure a custom field differently for each project context or in a global context. Moreover, project level schemes will over-ride global ones.

- Add new context
- View Custom Fields

Default Configuration Scheme for Feedback

Default configuration scheme generated by JIRA

Applicable contexts for scheme: Edit Configuration

                                      Issue type(s):
                                              Global (all issues)

Default Value: Edit Default Value

Options: Edit Options
- -5
- -4
- -3
- -2
- -1
- 0
- 1
- 2
- 3
- 4
- 5

The reporter will receive email with feedback link when Post-Function 'Sending feedback to reporter' is set up.

After the user (issue reporter) submits the survey the issue updates and rating with comment will be saved in selected fields above:

Schemes

You can create different schemes for customer satisfaction surveys and use them in different workflows or in different transitions.

Add new scheme and click on "Fields" button to add custom fields to it.

Fields

Attribute name	Attribute name (En)	Jira custom field	Option for which the comment will be required		
[ ]	[ ]	CRM Com ⇕	My Region LLC ⇕		Add
Оцените нашу работу	Rate our work	Rating	-2	Options	Delete
Комментарий	Comment	CSI Comment			Delete

Close

Item	Description
Attribute name	This name will be displayed as a field name in the survey (default system language)
Attribute name (En)	This name will be displayed as a field name in the survey (if the system language is English)
Jira custom field	Select a field created for the customer satisfaction from the dropdown list of available fields (Select Single choice, Text or HTML types)
Option for which the comment will be required	When Select (single choice) field is selected you can require a comment for one of the field's options. Don't forget to add a Comment (Text or HTML field) to the scheme in this case.
Options	Open the dialog window to customize the options (only for Select fields). See below.
Delete	Delete the attribute from the scheme

Customize Options

You can set the colors for each option in the feedback letter and use the colors in the gadget.

Click on "Options" button to open the dialog:

Options

Option name	Name	Color	Use in gadget	Use on page
-2	-2	▭ red ▾	☑	☑
-1	-1	▭ orange ▾	☑	☑
0	0	▭ purple ▾	☑	☑
1	1	▭ blue ▾	☑	☑
2	2	▭ green ▾	☑	☑

Close

Item	Description
Option name	Option name as it is saved in the custom field
Name	Create your own option's name to display it in the letter and gadget
Color	Select the color for the option
Use in gadget	When checked the selected color will be displayed for the option in the gadget (see below)
Use on page	When checked the selected color will be displayed for the option in the feedback lett

Customers Satisfaction Gadget
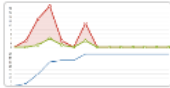
You can create HelpDesk Satisfaction Pie Chart Gadget based on received data from customers.

For example:
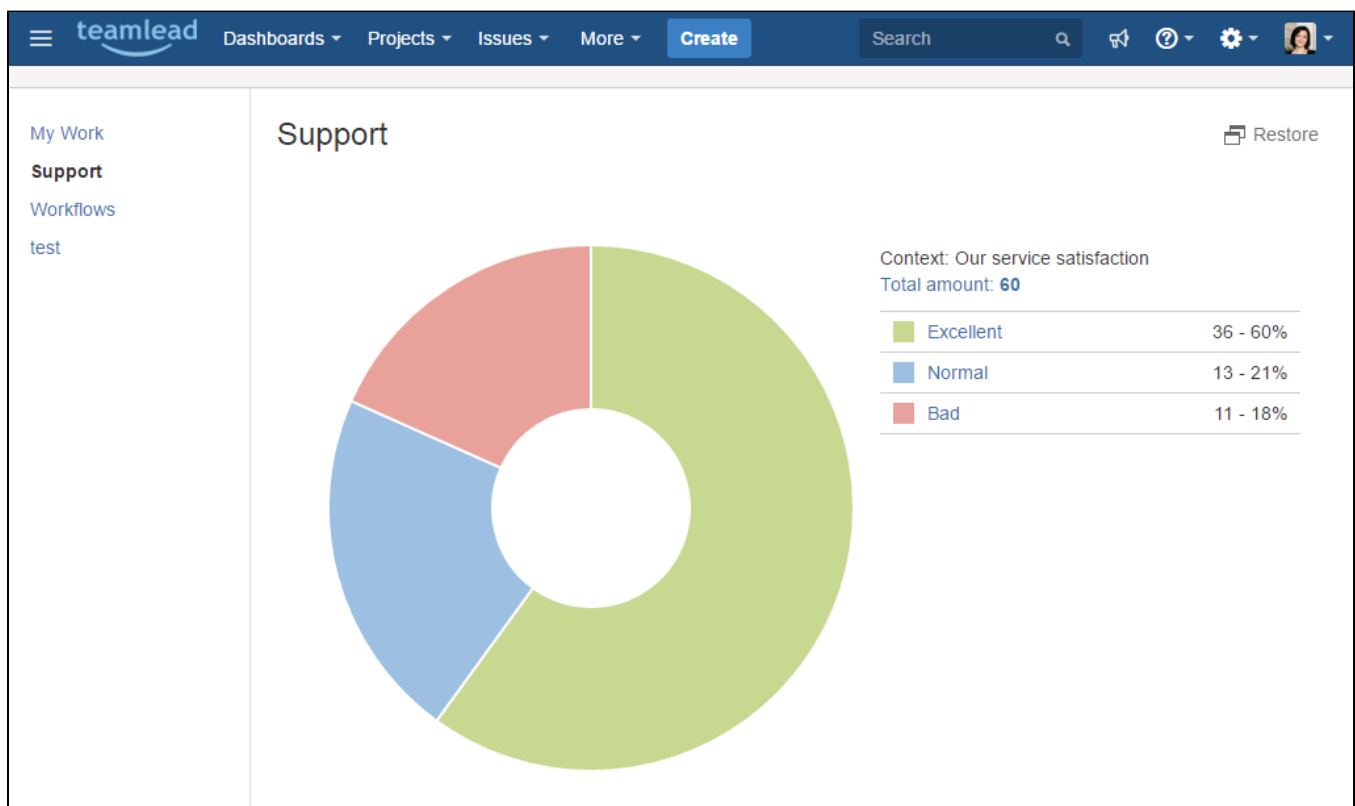
Because of rounding, totals can not add up to 100.