

Setup and Process Surveys



1 Setup

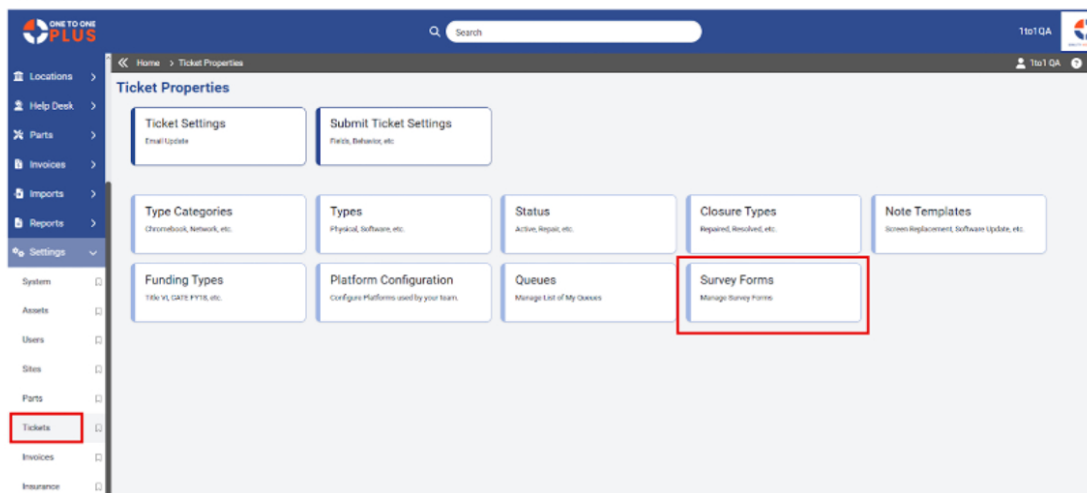
Surveys

A new feature has been introduced in the Help Desk section to track surveys sent when a ticket is marked as "closed" for users with a staff or support-related role. The ticket must be closed by a technician for the survey to be triggered.

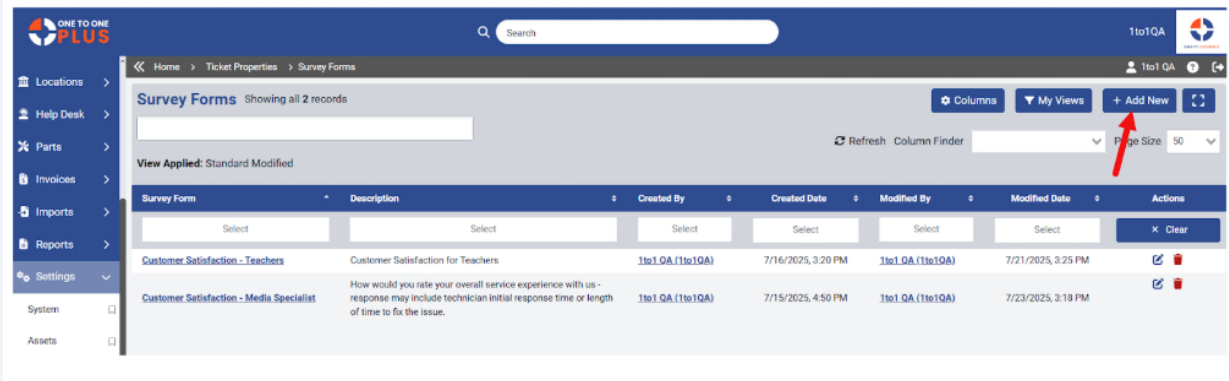
Use the instructions below to configure this new feature.

Setup

- **Survey Forms** - To use this feature, a survey form must be set up. You can create or manage survey forms by navigating to **Settings > Tickets > Survey Forms**.



2 Add new survey form



3 Survey form fields will appear as follows:

The screenshot shows the 'Edit Survey Form' page. It includes a sidebar with navigation links and a main content area with a 'Survey Settings' section. Red numbers 1, 2, and 3 highlight specific fields: 1 points to the 'Title' field, 2 points to the 'Description' field, and 3 points to the 'Comments and Concerns' field.

Customer Satisfaction Survey

1 How would you rate your overall service experience with us - response may include technician initial response time or length of time to fix the issue. Please rate your technician with 1-5 stars and add any additional comments or concerns.

2 How do you rate your overall experience with your technician and was the issue resolved in a timely manner? *

3 Comments and Concerns *

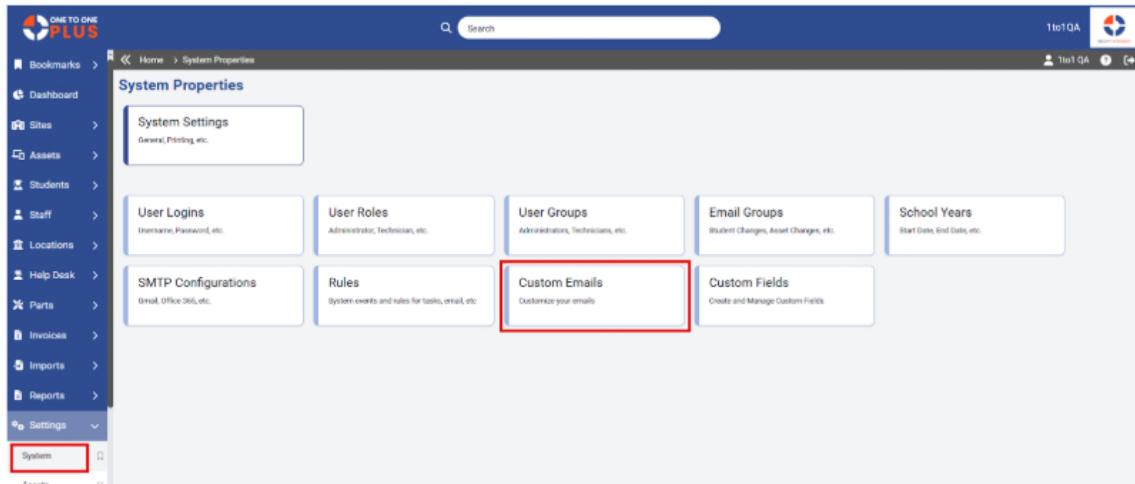
Submit Survey

Title can be a generic name of the type of survey form. **Description** will print on the survey that is sent to the related user. This can be a detailed explanation of the type of responses you are looking for.

The section on the right hand side can be customized with your question that will be displayed beside the star rating. The comments question will display a box beside the question for users to provide additional comments.

4 Custom Email has to be setup to use surveys

- **Custom Emails** - A custom email will need to be created for the survey form and link the form to the email.



5

Below outlines where each part of the email is created. Subject is automatically set to a default subject line.

The **subject** line will automatically be populated when a survey form is selected with text that will identify a survey email. The **body** will display in the body of the email.

The screenshot displays the 'Edit Custom Email' interface for 'ONE TO ONE PLUS'. The interface includes a sidebar with navigation options like Bookmarks, Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, and Imports. The main area shows fields for Name, Subject, Description, and Body. The Subject field is highlighted with a red circle and the number 1, containing the text 'Your Feedback on (Ticket #) Matters - Help Us Imp'. The Body field is highlighted with a red circle and the number 2, containing the text 'Your support ticket has been successfully closed. We strive to provide the best service, and we would love to hear your thoughts.' To the right, a 'Survey' dropdown menu is shown, with 'Customer Satisfaction - Media Specialist' selected. Below the interface, a preview of the email in a Gmail inbox is shown. The email subject is 'Your Feedback on (Ticket TSK-5009898) Matters - Help Us Improve!'. The body of the email includes the 'ONE TO ONE PLUS' logo, the same body text as the edit interface, and a red 'Survey' button. A note at the bottom states 'Note: Link will expire in 7 days'.

6 Rules must be set for each custom email survey form.

- **Rules** - A rule will need to be set up to trigger the custom email to be sent at the time a ticket is closed.

There are four key things that must be set in the rule.

1. **Event** must be set to "ticket is updated"
2. **Condition** must contain "status is one of closed"
3. **Notification** must contain action of "send survey email to related user" and survey email template must be survey form name.

7 Status of closed is required for the rule but you can also add ticket type as a condition. You must select "Send Survey Email to Related User" action.

8 Process

Process

- **Edit/Add Staff** - A Survey will be sent to staff with Type set to “Employee” or “Support” only.

The screenshot shows the 'Edit Staff' form for a user named Mary Ingles. The 'Type' field is set to 'Employee' and is highlighted with a red box. Other fields include Staff ID (M123), First Name (Mary), Middle Name, Last Name (Ingles), and Status (Active).

9 When ticket meets the rule criteria and saved, a survey will be triggered to email the related user.

- **Edit Ticket** - When a ticket that meets the rule criteria and is closed by a technician, it will then automatically send a survey email to the related user when the ticket is saved.

The screenshot shows the 'Edit Ticket' form for ticket TSK-5009897. The 'Status' field is set to 'Closed' and is highlighted with a red box. Other fields include Description (Cracked Screen), Closure Type, and Closure Notes. The form also shows a list of ticket categories and types.

10 A record of the survey is updated to the Surveys manage page

- **Survey Email** - Once the survey email is sent, it will immediately update the Survey Manage screen as an incomplete survey.

Survey ID	Ticket ID	Ticket Types	Related User	Technician	Is Completed	Rating	Comments	Queue Name	Collaborators
SVY-3517VFS3MFBQ	TSK-5009897	Chromebook	Mary Ingles	Joey Cole	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	☆☆☆☆☆			
SVY-49EC54P1MXX2	TSK-5009898	Chromebook	Zac Coggins	Ben Zuber	No	☆☆☆☆☆			
SVY-6JVLZ2Q885	TSK-5009718	Chromebook	Mary Ingles	Ben Zuber	No	☆☆☆☆☆			
SVY-RSOLJL5ZZJD	TSK-5009745	Chromebook	Mary Ingles	Ben Zuber	No	☆☆☆☆☆			

11 The link will expire in 7 days.

The survey email will contain a “Survey” button that the related user can click on to take them to the survey questions. This link will expire in 7 days.

ONE TO ONE PLUS

Your support ticket has been successfully closed. We strive to provide the best service, and we would love to hear your thoughts.

[Survey](#)

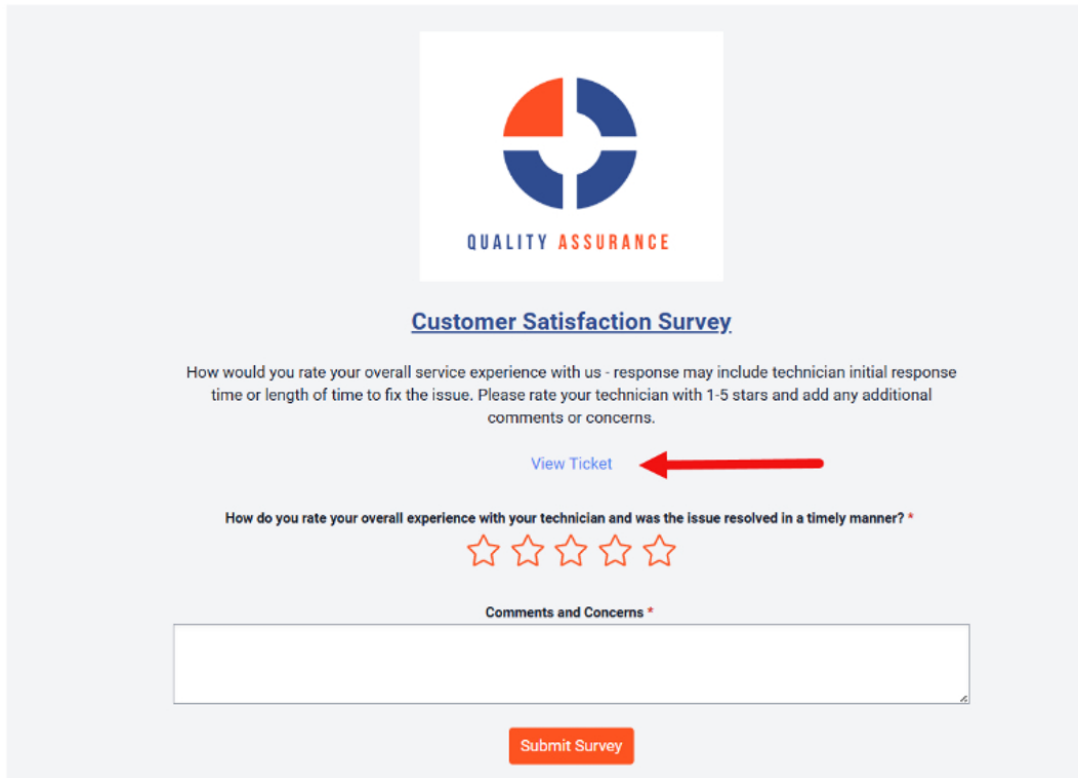
Note: Link will expire in 7 days

Ticket ID	TSK-5009897
Ticket Description	Cracked Screen
Ticket Type	Chromebook
Related User	Mary Ingles
Technician	Joey Cole
Site	QAHS

Survey links can also be opened on a phone or ipad.

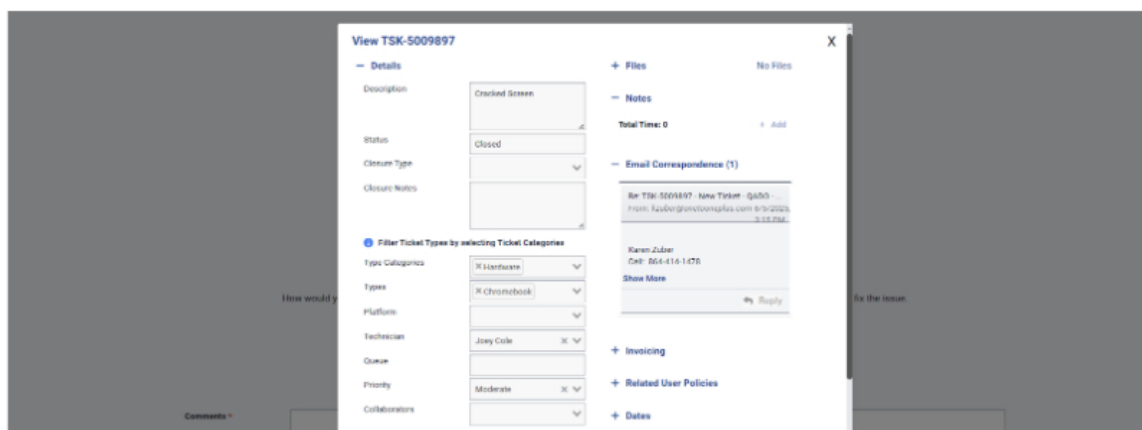
12 A "view only" modal of the ticket can be viewed in the survey.

When the related user clicks the survey link, a new tab will appear with the survey instructions, view ticket option, survey question, 5 star rating, and comment section. The view ticket option will display a view only version of the ticket that was closed.



The image shows a "Customer Satisfaction Survey" form. At the top is a logo with a blue and red circular design and the text "QUALITY ASSURANCE". Below the logo is the title "Customer Satisfaction Survey" in blue. The main text asks: "How would you rate your overall service experience with us - response may include technician initial response time or length of time to fix the issue. Please rate your technician with 1-5 stars and add any additional comments or concerns." Below this text is a "View Ticket" link in blue, with a red arrow pointing to it from the right. Underneath the link is a 5-star rating system with five empty star icons. Below the stars is a text input field labeled "Comments and Concerns *". At the bottom is a red "Submit Survey" button.

13 See below



The image shows a "View TSK-5009897" modal window. It has a dark grey background with a white content area. The content area is divided into several sections: "Details" (Description: Cracked Screen, Status: Closed, Closure Type: dropdown, Closure Notes: text area), "Filter Ticket Types by selecting Ticket Categories" (Type Categories: dropdown, Types: dropdown, Platform: dropdown, Technician: dropdown, Queue: dropdown, Priority: dropdown, Collaborators: dropdown), "Files" (No Files), "Notes" (Total Time: 0, Add button), "Email Correspondence (1)" (Email: Karen Zuber, Cell: 864-416-1476, Show More button, Reply button), "Invoicing", "Related User Policies", and "Dates".

Once the submit survey is selected, a success message will be displayed.

- 14 A "survey success" message will appear after you submit the survey



Your survey has been successfully submitted. We appreciate your feedback!

15 The survey details will then be updated to the survey manage screen.

- **Surveys Manage** - The Surveys manage page is located under Help Desk in a new section called "Surveys". This option is visible only to Admin users.

The "completed" surveys will be displayed by default.

Survey ID	Ticket ID	Ticket Type	Related User	Technician	Is Completed	Rating	Comments	Queue Name	Collaborators
SVY-3517YF3NFBQ	TSK-5009897	Chromebook	Mary Ingles	Joey Cole	Yes	★★★★★	Great experience with this technician.		07
SVY-49EC14P1NYX2	TSK-5009898	Chromebook	Zac Coggin	Ben Zuber	Yes	★★★★★	Test mobile		06
SVY-6JVLZ20085	TSK-5009718	Chromebook	Mary Ingles	Ben Zuber	Yes	★★★★☆	Response time was slow		07
SVY-30WR0KYAZ20U	TSK-5009942	Chromebook	Mary Ingles		Yes	★★★★★	Great experience	SAMS Queue	ES (Staff) Durham 06
SVY-1M1J2V0NCVLC	TSK-5009967	Laptop Missing Keys	Zac Coggin	Amy Aakhus	Yes	★★★★☆	Response time was longer than expected.		07

16 A link to the ticket can be viewed from the view survey screen.

View Survey
Created by 1to1 QA 8/8/2025, 2:42 PM Modified by 1to1 QA 8/8/2025, 2:44 PM

Survey Answers

Survey	SVY-4K55X17W98T6
Rating	5
Rating	★★★★★
Comment	great service

Ticket
[Edit Ticket \(TSK-5010050\)](#)