

Customer ratings can be sent out in 4 ways:

1. On completing a job card in lead to receipt. (This needs to be enabled in sales setup.)
2. On closing a helpdesk ticket. (This needs to be enabled in helpdesk settings.)
3. Customer can add a service rating at any time from their customer portal. (This can be enabled in sales setup.)
4. An admin user of the system can request a service rating from a customer from the Edit Customer screen.

This post only looks at service ratings sent out on closure of helpdesk tickets.

Include service rating in “ticket has been closed” email:

Email sent to customer that notifies them that their helpdesk ticket has been closed. This email can include the service rating feature if it has been enabled.

View Message #12670

Type Email to [redacted] Sent 2017-09-21 14:42:30 Customer [redacted]

Subject Your Helpdesk ticket has been closed Status Delivered User [redacted]

Ticket Details [redacted]

Resolution [redacted]

Closed [redacted]

You can rate our service provided on this ticket by clicking on [this](#) link or by clicking on the stars below.

☆☆☆☆☆

Why not try our new social media logins?
Did you know you can now link your Facebook, Twitter, Google or LinkedIn account to your DataTill account, making it easy to login automatically.

Close

How to view ratings:

Go to Sales -> Sales Leads and click on Ratings.

Here you will be able to see and acknowledge ratings received from various sources.

Workflow September 21, 2016 - September 21, 2017 + Add Refresh

Ratings > New

All Mine 10 records per page Copy Columns Clipboard Export Columns CSV Export Columns Excel Show / Hide Columns Search:

	Date	Status	Customer	Address	Contact Mobile	Rating	Rating Comment	
Leads 42	2017-06-09 17:06:06	Rating Submitted 3 months ago				★★★★★		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Surveys 8	2017-06-09 17:07:21	Rating Submitted 3 months ago				★★★★★		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Quotes 3	2017-06-12 11:20:54	Rating Submitted 3 months ago				★★★★☆		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Customers 8	2017-06-12 11:48:27	Rating Submitted 3 months ago				★★★★☆		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Job Cards 27	2017-06-12 11:55:50	Rating Submitted 3 months ago				★★★☆☆		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Invoicing 28								
Quality Control 16								
★ Ratings 22								
+ New								
✓ Acknowledged								

How to enable the ticket service ratings:

Go to Setup -> System Settings -> Helpdesk

Then turn the “Enable Ticket Service Ratings” on.

Helpdesk Setup

Helpdesk Settings

Helpdesk Active for Internal Use ON
Turns helpdesk functionality on or off globally

Helpdesk Active for Customer use ON
If disabled, customers will not be able to submit or view helpdesk tickets

Allow Public ticket Viewing ON
If enabled, a public random url will be generated to share the ticket details with customers. If enabled, customers will not need to be logged in to view their ticket or add notes.

Enable Customer Notifications ON
When turned on notifications will be sent to customers when their helpdesk tickets are updated

Send SMS notifications to Staff OFF
If enabled, a sms will be sent to staff when a ticket is assigned to them, but only if allowed by their notification settings.

Enable Ticket Service Ratings ON
If enabled, a link allowing the customer to rate our service will be included in the email sent on ticket closure