

Customer satisfaction survey

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Customer satisfaction survey models

The **Customer satisfaction survey** tab lists and maintains customer satisfaction survey models. Survey answers and survey questions have their own configuration pages.

If you need to...	Go to
Check the available model records	Find and review survey models
Understand the fields and list	Understand the survey model screen
Add or change a model	Add or edit a survey model
Remove a model	Delete a survey model
Maintain survey answers	Customer satisfaction survey answers
Maintain survey questions	Customer satisfaction survey questions

Before you start

Prerequisites

- Confirm that your subscription includes the configuration feature. When it does not, the page shows the subscription-upgrade surface instead of the configuration grid. .
- Confirm that the action you need is available to your role. **New** is shown when creating a record is allowed; row editing and deletion depend on the corresponding permissions. .
- Start from the list when you are adding a model. Open a row when you are changing an existing model. .

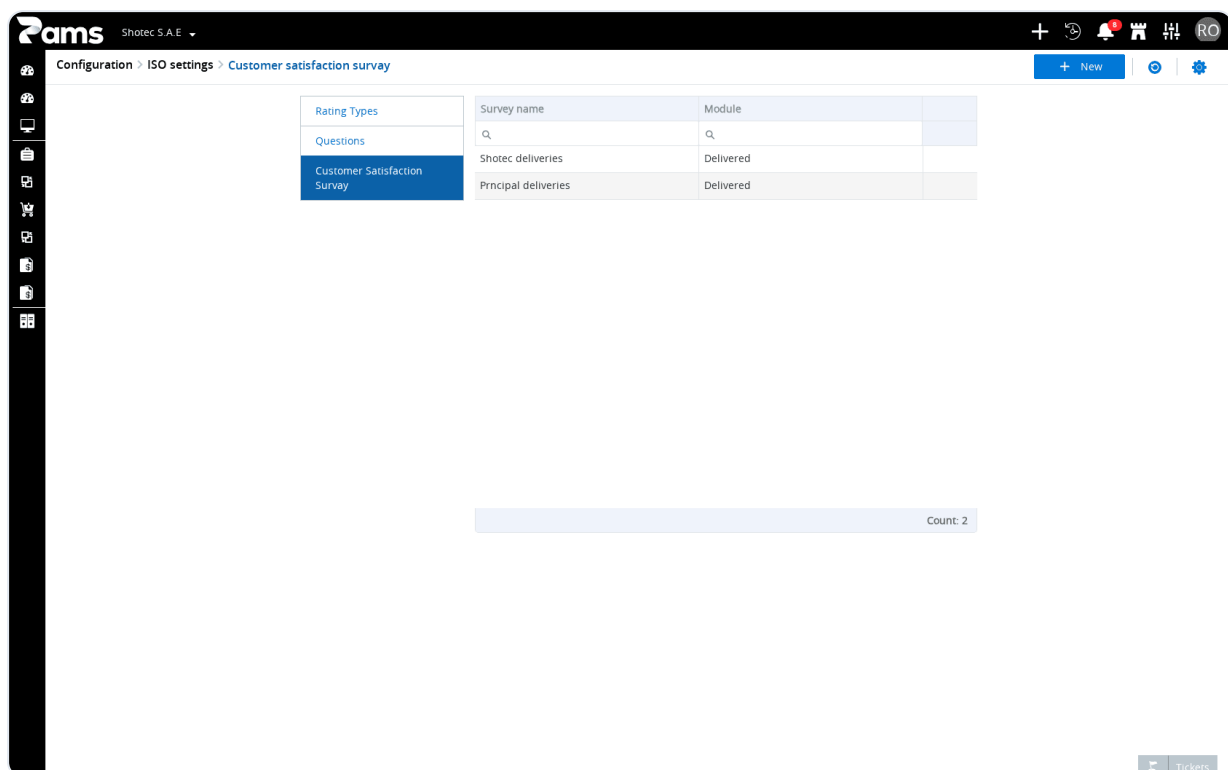
Find and review survey models

Use the list to review configured models or choose a row to maintain.

Steps

1. Open the **Customer satisfaction survey** tab.
2. Review the **Survey name** and **Module** columns.
3. Select the available action for your task:

If you need to...	Select
Add a survey model	New
Change an existing survey model	The model row



Result: You are at the customer satisfaction survey model list, with the available arrival controls and columns in view.

Understand the survey model screen

The list identifies each model by **Survey name** and **Module**. The form carries the model name, module selection, and survey details. It also carries hidden supporting values that you do not enter on the list.

Area	What to use it for	What it contains
List	Review configured models	Survey name and Module
Model name	Name the model	Survey name ; required
Module	Associate the model with a module	Module ; required in the form
Survey details	Provide the model's survey details	Required in the form

The list does not show column headers by default and does not use paging. Use the procedures below to add, edit, or delete a survey model.

You can select **Cancel** in the export or shared form dialog and **Export** to open the export-options dialog. The survey-answer, reference-list question, and question-unit fields belong to related configuration pages; maintain survey answers and survey questions on their own pages.

Add or edit a survey model

Add a new survey model or change an existing one. **Survey name**, **Module**, and the survey details are required in the model configuration; the required check is applied when you save.

Prerequisites

- You are on the survey model list.
- You have the permission required for the action.
- For an edit, the model row is already present.

Steps

1. Select the action for your task:

If you need to...	Select
Add a survey model	New
Change an existing survey model	The model row

2. Enter the model's name in **Survey name**.
3. Select the applicable value in **Module**.
4. Complete the survey details.
5. Select **Save**.

The form checks the required fields and can show `Field is required` when a required value is missing. Correct the indicated field and select **Save** again.

Result: After a successful new submission, the page shows `Data saved Successfully` .
After a successful edit, the page shows `Data updated Successfully` .

Delete a survey model

Delete a model when the model should no longer remain in the configuration list.
The delete option appears for a row only when your role has delete permission.

Prerequisites

- The model row is present in the list.
- You have delete permission.

Steps

1. Open the row's delete menu.
2. Read the confirmation message: `Are you sure you want to delete this item?`
3. Select **Delete**.

Result: The model is removed when deletion succeeds. If the action is refused, the page shows the applicable delete message.

When maintenance does not work

Use the message text on screen to choose the corrective action.

What you see	What it means	What to do
<code>Field is required</code>	A required model value is empty.	Complete the indicated field and select Save .
<code>Forbidden characters detected. Please remove them and try again.</code>	The submitted value contains forbidden characters.	Remove the forbidden characters and submit the action again.
<code>Related to Saved data, Can't be deleted</code>	The delete request was refused because the model is related to saved data.	Keep the model and review the related saved data before trying another maintenance action.
<code>Failed to Delete</code>	The delete request failed.	Do not assume the model was removed; return to the list and review the row.

What you see	What it means	What to do
Must have at least one item	The delete action cannot leave the list without an item.	Keep at least one model in the list.

Continue with related survey settings

Survey model configuration is one part of the related ISO survey settings. Survey answers and survey questions are maintained on sibling configuration pages.

Creating, changing, and deleting a survey model each has a corresponding configuration audit event.

Steps

1. Select **ISO settings**.
2. Choose the related configuration tab for your task:

If you need to...	Open
Maintain survey answers	Rating types
Maintain survey questions	Questions

Result: You are working on the related survey configuration page for the task at hand.