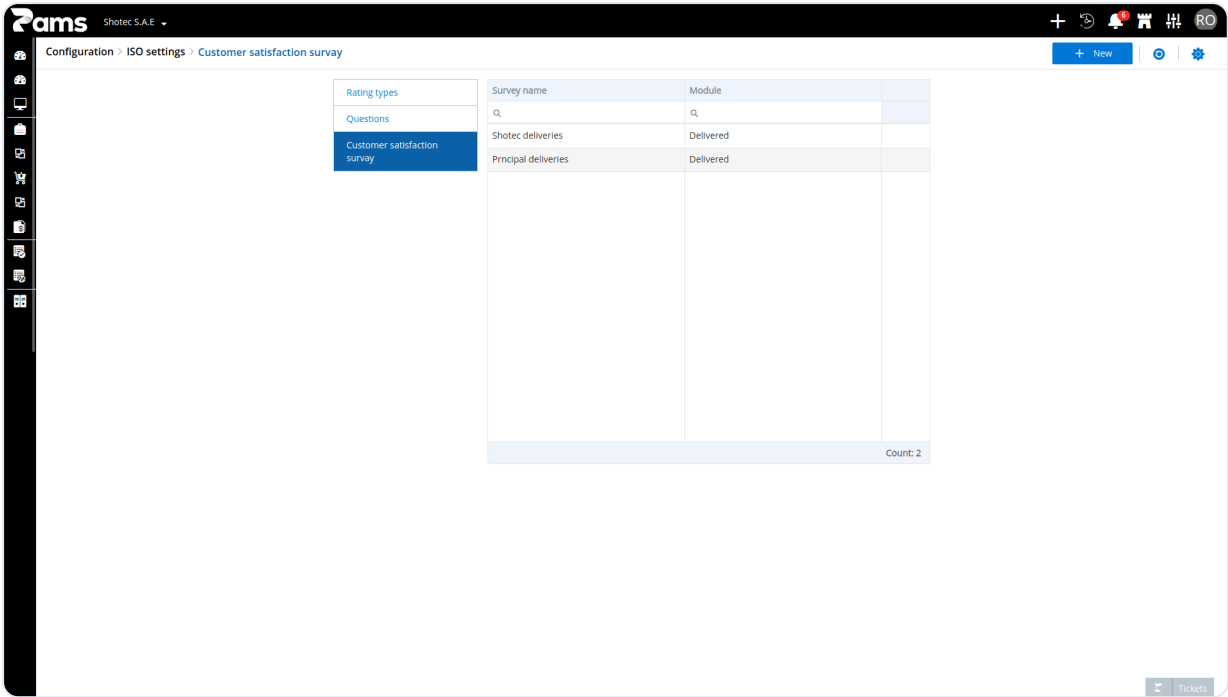


Customer Satisfaction Survey

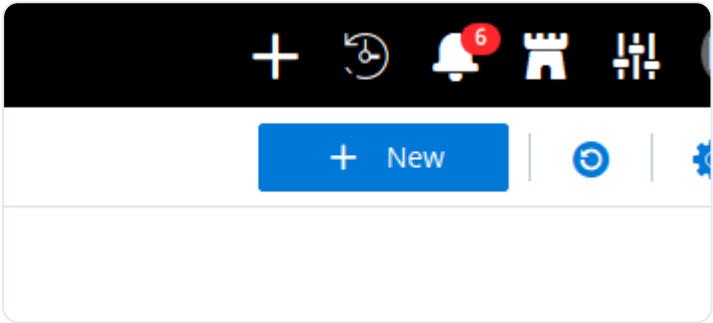
July 29, 2026

Customer Satisfaction Survey

Applications > Configurations > ISOSettings



Customer Satisfaction Survey — Configurations > ISOSettings > Customer Satisfaction Survey



Overview

Customer Satisfaction Survey is used to maintain survey records and the related question set within ISO settings. Sales representatives, account managers, project managers, and quality-focused users can use it when they need to locate an existing survey, review its questions, or prepare a new survey record for customer feedback activities.

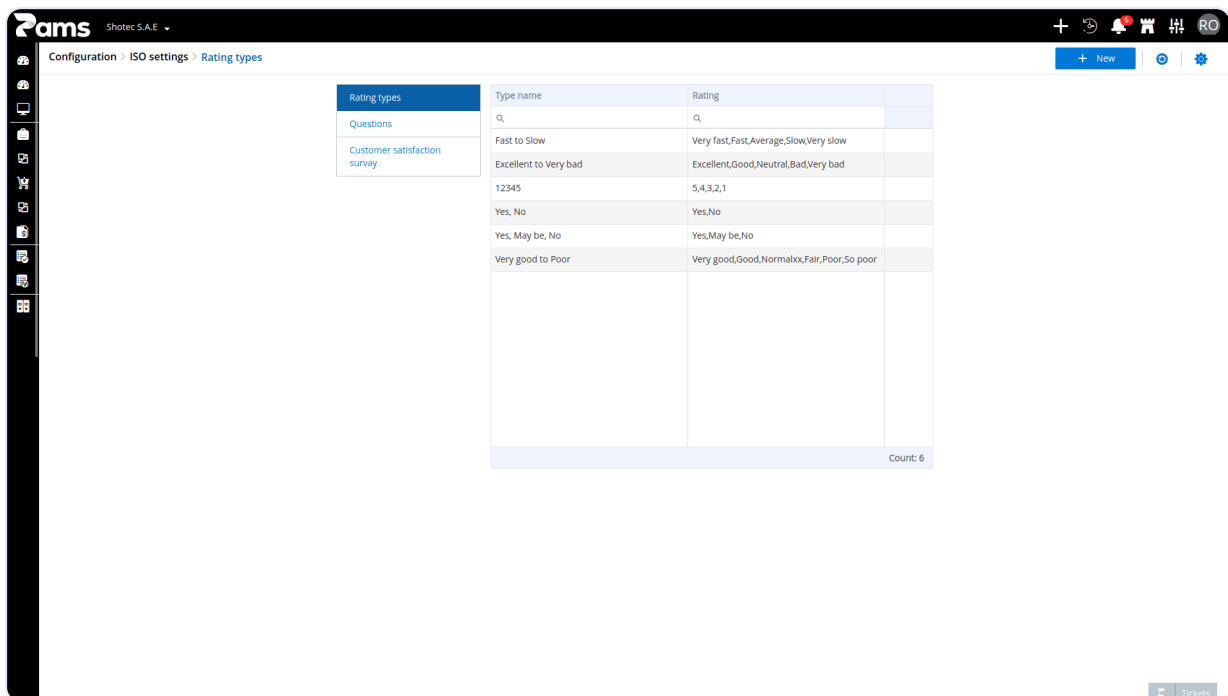
Open the feature from **Configurations > ISOSettings > Customer Satisfaction Survey**.

Settings

Before working with survey records, review the available configuration areas on the Customer Satisfaction Survey screen. The screen provides separate areas for ISO settings and survey questions, allowing you to maintain the survey record and then review the questions associated with it.

Note: The available screen does not show individual ISO setting fields. Use the **iso settings** tab to review the settings available for the selected survey record.

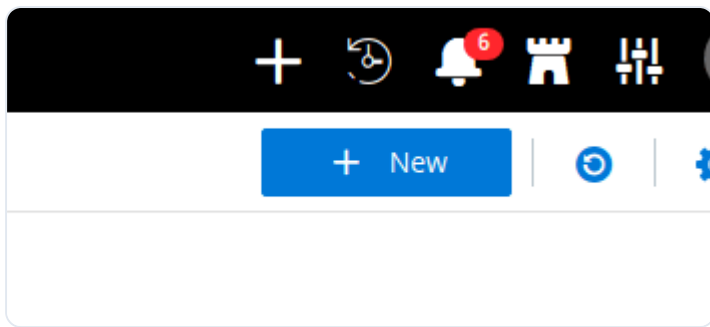
ISO Settings



Type name	Rating
Q	Q
Fast to Slow	Very fast, Fast, Average, Slow, Very slow
Excellent to Very bad	Excellent, Good, Neutral, Bad, Very bad
12345	5, 4, 3, 2, 1
Yes, No	Yes, No
Yes, May be, No	Yes, May be, No
Very good to Poor	Very good, Good, Normal, Fair, Poor, So poor

Count: 6

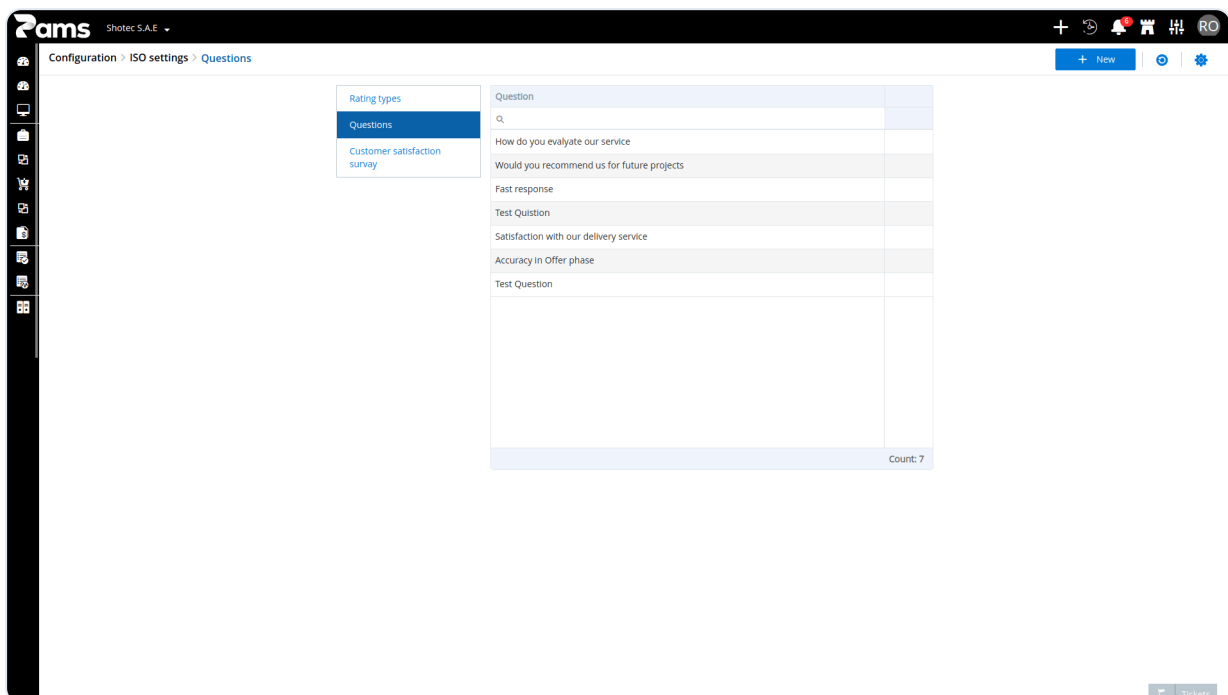
Customer Satisfaction Survey — Configurations > ISOSettings > Customer Satisfaction Survey



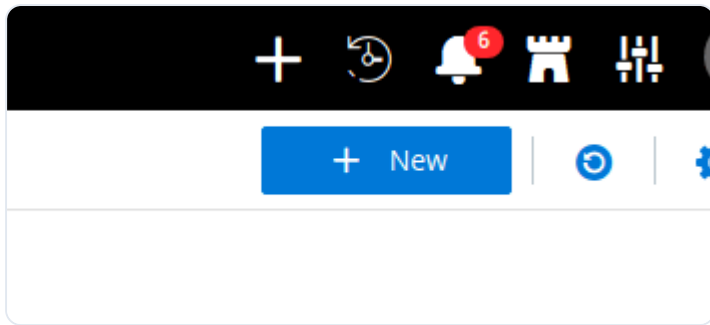
The **iso settings** tab contains Customer Satisfaction Survey records. Use this area to find and select the survey record that you need to review or maintain. The visible records represent surveys with a survey name and a related business area or status description.

Use **Search** to locate a survey by the information shown in the list. If you need to reduce the results further, select **Apply filter**. No control is provided that explicitly moves a survey record into or out of this tab; the tab displays the available ISO survey settings records.

Questions



Customer Satisfaction Survey — Configurations > ISOSettings > Customer Satisfaction Survey

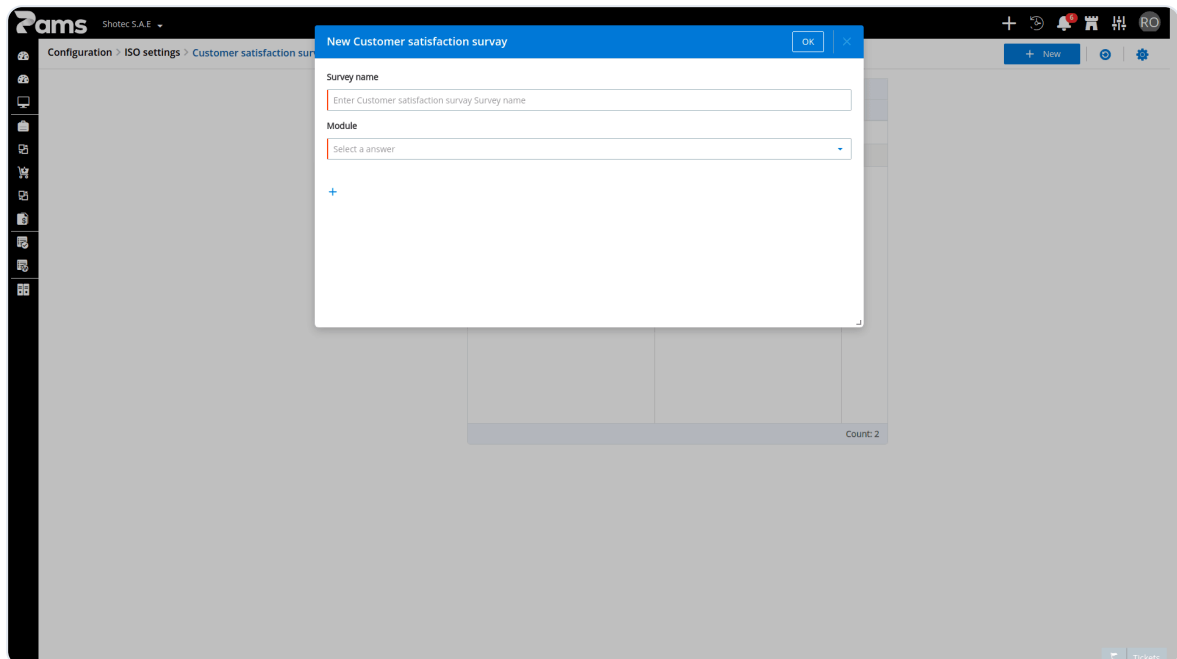


The **questions** tab is used to review the questions available for the selected Customer Satisfaction Survey record. Use this tab after selecting the relevant survey in the ISO settings area to verify that its question content is available for review.

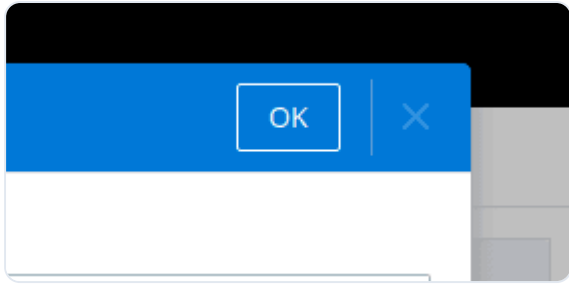
The available screen does not show a control that explicitly moves a record between the **iso settings** and **questions** tabs. Use the tabs to switch between the survey record and its related question view.

Workflow

1. Open **Customer Satisfaction Survey** from **Configurations > ISOSettings**. Review the existing survey records before creating or changing a record.



Customer Satisfaction Survey — Configurations > ISOSettings > Customer Satisfaction Survey



2. **Need to find an existing survey?** Enter relevant search text in **Search**, then select **Apply filter**. Review the filtered survey list and select the record you need to work with.

Tip: Search before creating a new record to avoid maintaining duplicate survey records for the same customer satisfaction activity.

3. **Need to create a survey record?** Select **New**. Complete the information made available in the new-record view, then use **Ok** when it is available to confirm the entry. Select **Cancel** instead if you decide not to continue.
4. **Need to review the survey configuration?** Select the **iso settings** tab. Confirm that you are working with the intended survey record before reviewing its questions.
5. **Need to review related survey questions?** Select the **questions** tab. Use this view to review the questions associated with the survey record you selected.
6. **Need to include a file with the survey record?** Use **Attach** and review the **files[]** field to confirm that the file is available on the record. If an attachment action opens a confirmation window, use **Ok** to proceed or **Cancel** to stop without confirming.
7. **Need an extract of the displayed records?** Apply any required search or filter criteria first, then select **Export**. Export only the records currently relevant to your review.
8. **Need to refresh or adjust the screen view?** Use **icn-update** to update the displayed information, or select **icn icn-settings** where additional screen settings are required. Because the available screen does not identify the options behind these icons, verify the result before continuing.

Warning: The available screen does not provide a survey status field or an approval, sending, or completion action. Do not assume that creating a record,

attaching a file, or reviewing questions sends a survey to a customer.

Examples

A project manager needs to review the customer satisfaction survey used for a completed delivery activity.

1. The project manager opens **Configurations > ISOSettings > Customer Satisfaction Survey**.
2. In **Search**, the project manager enters a relevant term from the delivery or survey name and selects **Apply filter**.
3. The project manager selects the matching survey record and opens the **iso settings** tab to confirm that the correct Customer Satisfaction Survey record is being reviewed.
4. The project manager selects the **questions** tab to review the questions maintained for that survey.
5. If the project manager has a supporting customer document, they select **Attach** and confirm that it is shown in **files[]**. If the attachment process presents a confirmation option, they select **Ok** to complete it.
6. To provide the filtered survey list to the quality team, the project manager selects **Export**.

The result is a reviewed survey record, with its related questions checked and any available supporting file attached to the record.

Tips

Tip: Use **Apply filter** before **Export** so that the exported output is limited to the survey records relevant to the current review.

Note: Use **Cancel** whenever you decide not to confirm an action in an open dialog or entry process.

Warning: **Tickets** is available on the screen, but the available information does not describe its effect. Use it only when your internal process requires it.

Troubleshooting

Symptom	Likely Cause	Fix
The required survey record is not visible.	The list contains more records than the current view shows, or the search criteria are too broad.	Enter a more specific value in Search and select Apply filter .
The survey questions are not displayed.	The wrong survey record may be selected, or the questions tab has not been opened.	Return to iso settings , select the intended survey record, and then open questions .
A file is not visible after attempting to add it.	The attachment may not have been confirmed or may not have been added to the selected record.	Use Attach again, complete the available confirmation with Ok , and check files[] .
Exported information is broader than expected.	No search or filter was applied before exporting.	Use Search and Apply filter , verify the displayed records, then select Export again.

Related pages

- [Rating Types](#)
- [Configurations — Overview](#)
- [Configurations — Learning Path](#)
- [2 Factor Authentication](#)
- [Account Managers](#)
- [Branches](#)
- [Flags](#)
- [Frequent Currencies](#)
- [Products](#)
- [Custom Fields](#)
- [Dashboard Settings](#)
- [Dynamic Validation](#)
- [Banks](#)
- [Invoice Settings](#)
- [Activity Purpose](#)