

QMATIC

CONFIGURATION AND SETUP

CUSTOMER FEEDBACK

226.F

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1. What's New

This section describes what is new in this manual, since the latest major release of Customer Feedback.

Survey Page Configuration chapter

- Added question type Rating Star
- Added question type Selection
- Added parameter Mode
- Added parameter Level
- Added parameter Config

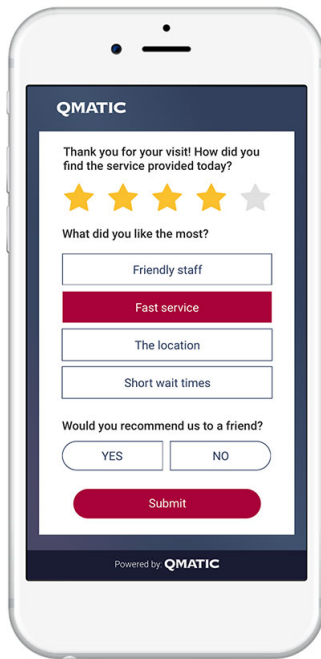
On-premise Configuration chapter

- Added instruction on manual fixes needed in order to use updated version of Customer Feedback with earlier Orchestra versions.

2. Introduction

2.1 General information

Customer Feedback provides a way for customers to share their experience of the customer journey through an easy-to-use survey. With Customer Feedback, you have the opportunity to get valuable feedback and information from customers that otherwise would have been lost.

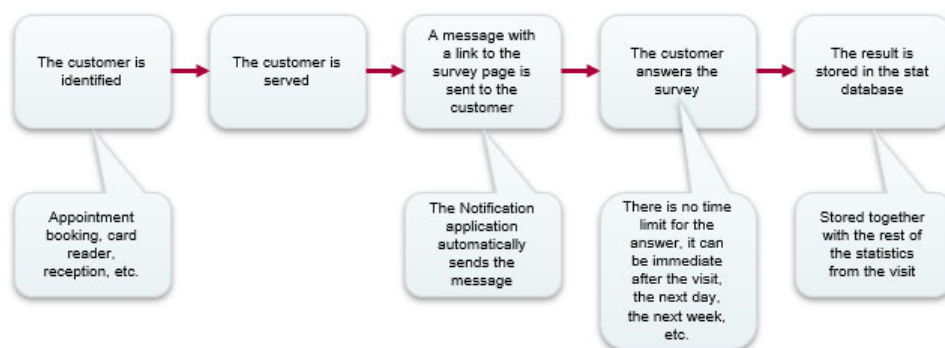


The following applies to Customer Feedback:

- Customer Feedback requires at least Orchestra 6.1
- Statistics, reports, notifications, etc are in Orchestra.
- No app is needed, the survey is a web page.

2.2 Typical use case

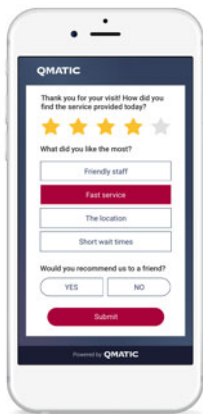
The following flow chart explains a typical scenario for how the Customer Feedback solution is used:



1. The customer is identified, or the customer's phone number is added to the visit.
2. The customer is served.
3. When the visit is ended, a link to Customer Feedback is sent to the customer via the Notification application.
4. The customer opens the link and answers the survey.
5. The answers are sent to stat and is presented in reports together with details about the visit.

3. Configure survey page

To make Customer Feedback work the way you want, you need to configure and customize the survey page.



Follow these steps to set up Customer Feedback:

1. **Configure the questions** - for example type of questions and possible follow-up questions. See “Question types” on page 10 and “Configure questions” on page 13.
2. **Customize the look and feel** - for example colors and fonts. See “Branding” on page 15.
3. **Translate the content if needed** - support for multiple languages. See “Translation” on page 16.

All configuration is done in files that are sent to support.

3.1 Question types

In Customer Feedback, there are six different question types available. The question types are described more in detail below.

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Rating by stars

Multiple choice question

This is the accent color

This is the hover effect

Selection no state and no

This is a long line of selection that brakes over two lines

Rating by smiley x5

Rating by smiley x4

NPS Rating

0

1

2

3

4

5

6

7

8

9

10

YES/NO question

YES

NO

Free-text question

Your text here

Submit

Powered by QMATIC

Star rating question with follow-up Selection question

Rating question with 2-5 smileys as answer options

NPS question

Yes/No question

Question with free-text answer

ⓘ Max number of questions is 7.

3.1.1 Rating question



Example question: How did you experience our service today?

- 2–5 answer alternatives. presented as icons (the icons can be changed)
- There are three images per icon; one selected, one hovered, and one unselected
- The images are SVG format, to be scalable and possible to display properly on different screen sizes.

3.1.2 Rating Star question



Example question: How did you experience our service today?

- 3–10 answer alternatives presented as stars (can be changed).
- Supports up to 4 conditional follow-up questions.
- The images are SVG format, to be scalable and possible to display properly on different screen sizes.

3.1.3 Selection question

Example question: Please indicate the reason for your rating.

- Multiple-choice questions
- 2–6 answer alternatives
- Possibility to set a maximum number of answers that can be selected
- Supports follow-up questions

3.1.4 Yes-No question



Example question: Would you recommend us to a friend?

- Yes/No types of questions
- No icons
- Always two alternatives
- Supports follow-up questions

3.1.5 Scale (NPS)

Example question: How likely are you to recommend our services to a friend?

- NPS types of questions
- Always 0–10

3.1.6 String (free-text) question

Example question: Any other comments?

- Free text answers
- Maximum of one per survey
- Maximum of 255 characters

3.2 Configure questions

The configuration of the questions is managed in the `questions.json` file.

The following is configured:

- Number of questions
- Icons to be used
- Questions that are to be saved in stat.

Example of a questions.json file:

```
{
  "Mode": 2,
  "Questions": [
    {
      "question_key": "question_1",
      "question_stat_text": "Rate the quality of service in the branch",
      "type": "RatingStar",
      "no_answers": 5,
      "icon_folder": "assets",
      "mandatory": 1,
      "level": 0,
      "config": {
        "star5": ["question_2", "question_5"],
        "star4": ["question_3", "question_5"],
        "star3": ["question_3", "question_5"],
        "star2": ["question_4", "question_6"],
        "star1": ["question_4", "question_6"]
      }
    },
    {
      "question_key": "question_2",
      "question_stat_text": "What did you like most in service?",
      "type": "Selection",
      "max_no_answers": 3,
      "mandatory": 1,
      "level": 1,
      "answers": {
        "answer_1": "Competent work of the manager",
        "answer_2": "Fast service",
        "answer_3": "Pleasant atmosphere in the branch",
        "answer_4": "Solution of the problem"
      }
    }
  ]
}
```

Explanation of the parameters in the `questions.json` file:

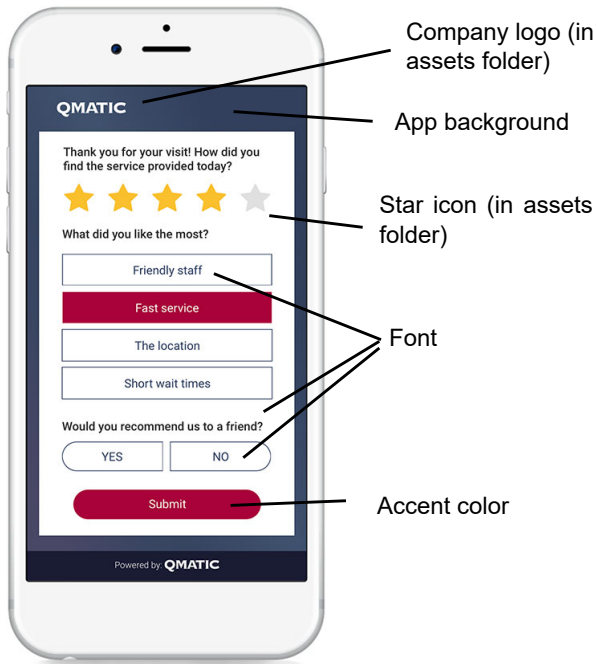
- **Mode:** sets which mode to run. Enter **"2"** to be able to use follow-up questions and the new question types (RatingStar and Selection). Otherwise use **"1"**.
- **question_key:** indicates which question this is, e.g. `"question_1"` is the first question.
- **question_stat_text:** sets the text stored as the question in stat. This text is *not* the one shown on the page (even if it *can* be identical). The purpose is to always have the same text in stat, even if the survey page is available in different languages.
- **type:** specifies the type of question. See "Question types" on page 10.

- **no_answers**: determines the number of answers used. For example, if the question type is “Rating” and you enter “5” in this setting, then you will have five icons (for example smileys).
- **max_no_answers**: determines how many answers the respondent can select. Only used for the question type “Selection”
- **icon_folder**: specifies the folder where the icons are stored. This makes it possible to replace the icons on the survey page.
- **mandatory**: determines if the question is mandatory or not. If this setting is set to “1”, the question is mandatory and if it is set to “0”, it is optional.
- **level**: Comes into effect when configuring follow-up questions. All questions on the same level will be shown at the same time.
- **config**: indicates which questions that should come with a certain answer. Used for follow-up questions.
- **answers**: here is where you enter your answers for the question type Selection. Minimum is two answers, maximum is six. This is what is saved as answers in stat, not what is shown on the survey page. The answers also needs to be defined in the language file(s), for example en.json.

3.3 Branding

Branding is configured in a file called `themes.css`, located in the **themes** folder. In this file, you specify the look of the survey page, when it comes to, fonts, logotype, colors, etc.

In the image you can see some of the most important parts that can be customized.



Example of the *themes.css* file:

```
14  /*Change the Accent color*/
15  :root {
16    --accent-color : #a9023b;
17    --qmaticblue : #334366;
18    --qmaticblue50 : rgba(51, 67, 102, 0.5);
19    --button-color : #ffffff;
20    --qmaticspecial: #1a1c34;
21  }
22
23  /* Edit to change app logo */
24  .custom.logo-image {
25    background-image: url('../assets/qmLogo.png') !important;
26  }
27
28  /* Edit to change app background */
29  #app-bg {
30    background-image: linear-gradient(221deg, #32405c, #40526e 35%,
31    . . . . . #374561 63%, #394561 77%, #484766) !important;
32  }
33
34  /* Edit to change font */
35  .custom.font{
36    color: #2e2e2e !important;
37    font-family: "Roboto-Medium";
38  }
39
40  /* Edit to change font of buttons */
41  .custom.btn-font{
42    color: var(--qmaticblue) !important;
43    font-family: "Roboto-Regular";
44  }
```

All files referred to in the *themes.css* file must be provided together with the *css* file. They are then placed in the *assets* folder, specified in the file.

3.4 Translation

Translations are stored in one JSON file per language, for example *en.json* for English. Customer Feedback supports the use of multiple languages, in parallel. The language is decided by the set browser language.

To translate Customer Feedback:

1. Open *en.json*
2. Translate questions, answers (if needed) and other texts.
3. Save as *xx.json*, use language codes according to ISO 639-1.

Example of a language file:

```

1  {
2    "app-title": "Feedback",
3    "question": {
4      "question_1": "Rate the quality of service in the branch",
5      "question_2": "What did you like most in service?",
6      "question_3": "Indicate what influenced your rating",
7      "question_4": "Indicate the reason for the low rating",
8      "question_5": "Comment",
9      "question_6": "Tell us more about what caused the low rating"
10   },
11   "question_2": {
12     "answer_1": "Competent work of the manager",
13     "answer_2": "Fast service",
14     "answer_3": "Pleasant atmosphere in the branch",
15     "answer_4": "Solution of the problem"
16   },
17   },
18   "thank-you-page-message-title": "Thank you!",
19   "thank-you-page-message": "Optional text",
20   "error-page-message": "Invalid URL!",
21   "browser-not-support-message": "Customer Feedback is not compatible",
22   "validation-alert-message-all": "Please answer the questions",
23   "validation-alert-message-single": "Please answer the question",
24   "validation-alert-Q%": "Q%",
25   "add-comment": "Add comment...",
26   "radio-label": {
27     "yes": "Yes",
28     "no": "No"
29   },
30   "submit-button": "Submit"
31 }

```

Explanation of the parameters in the language file:

- `question_<number>` - The same question key as in the `questions.json` file.
- `answer_<number>` - Answers for question type Selection.

The parameters at the top of the file are for the text shown on the survey page and the parameters at the bottom are for the texts shown on the other pages, such as the thank you page, error page etc. There is also the text for the Submit button.

⚠ A change of the text string in the language file, for example `en.json` will not result in a new question stored in Stat, only the text shown on the survey page is changed.

4. On-premise Configuration

The following needs to be configured:

- If you use an earlier version than Orchestra 7 update 9, you have to do some manual steps to be able to use the updated version of Customer Feedback. See “Update instructions” below.
- The Notification Application must be configured to send notifications after the visit has ended. See “Notification Application” on page 20.
- The API Gateway must be installed and running to communicate with the survey page. See “API Gateway” on page 22.

4.1 Update instructions

ⓘ The following steps applies if you use an earlier version than Orchestra 7 update 9.

To be able to use Customer Feedback with Rating Star and follow-up questions, (“mode 2”), you have to go through some manual steps:

1. Execute the `customer_feedback_update.sql` file. This file will be named differently depending on which database you use. Files can be found in the Customer Feedback package in `dist\package\sql`, or on Qmatic World.
2. Copy `feedback_v3.ktr` to `<orchestra installation directory>\system\conf\stat-jobs\custom`

3. Edit the `stat-jobs.xml` file in `<orchestra installation directory>\system\conf\stat-jobs\` according to the following:

Update

```
<job filename="qmatic/feedback_v2.ktr" batch-limit="50000" max-time-before-processing="10" />
```

to

```
<job filename="custom/feedback_v3.ktr" batch-limit="50000" max-time-before-processing="10" />
```

4. Upload new report in Business Intelligence

4.2 Notification Application

For more information about the Notification application, see the Orchestra Administrator's Guide.

Follow these steps:

1. In the Notification application, open the SMS tab and configure your SMS Gateway, so that your system can send SMS messages. We recommend using Messaging Services.



Having an SMS provider and the cost of SMS messages is not included in the Customer Feedback solution.

2. You will receive a URL from Support that has this format:

```
https://cf.qmatic.cloud/<token_identifying_client>/index.html
```

for example:

```
https://cf.qmatic.cloud/040a4ef2-2182-45e1-abcd-bc7371b36c06/index.html
```

You need to add the parameters "branchId" and "visitId" to the url, to make it a complete url that can be used in the Notification application.

The complete url would then have this format:

```
https://cf.qmatic.cloud/<token_identifying_client>/index.html?b{{branchId}}&v={{visitId}}
```

for example:

```
https://cf.qmatic.cloud/040a4ef2-2182-45e1-abcd-bc7371b36c06/index.html?b=1&v=12
```

3. In the Visit End sub tab of the Notification application, configure the Visit End message (email and/or sms). Visit End messages are sent out after the Visit to Customers with a registered phone number and/or email address, using the url described above, as in the following example:

Email Message

Content TypeHTML

SubjectFeedback

ParameterVisit IdInsert

ServicesAll

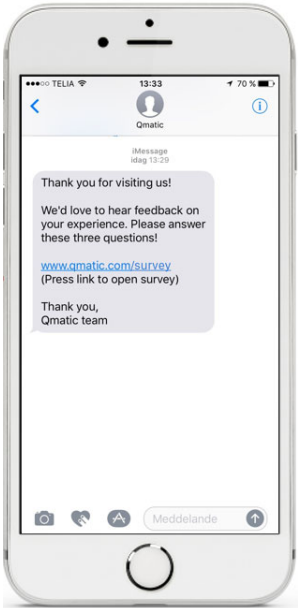
Messages

https://cf.qmatic.cloud/040a4ef2-2182-45e1-abcd-bc7371b36c06/index.html?b={{branchId}}&v={{visitId}}

ParameterVisit IdInsert

SaveCancel

The end result will then look something like this:



4.3 API Gateway

For more information about the API Gateway, please see the API Gateway Manual, found on Qmatic World.

The following is needed:

- The API Gateway must be installed and running.
- There must be an API Gateway user in Orchestra. This user needs a role with access to the endpoint connector.
- The API Gateway token must be sent to Qmatic Support, to establish a connection between Orchestra and the survey page.

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