Feedback & Complaints

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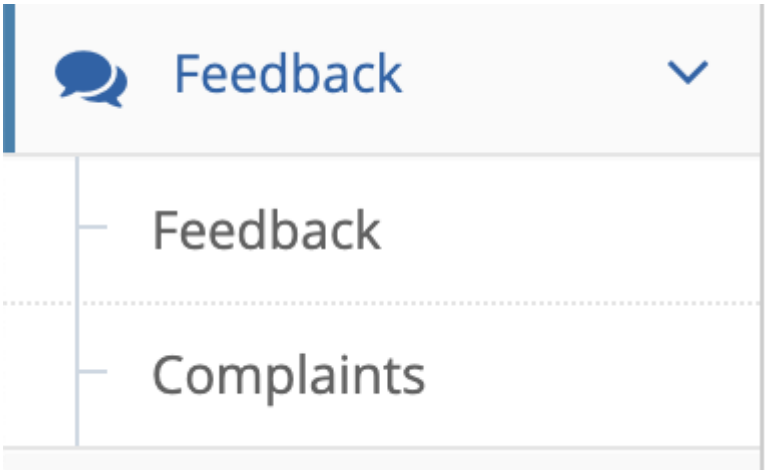
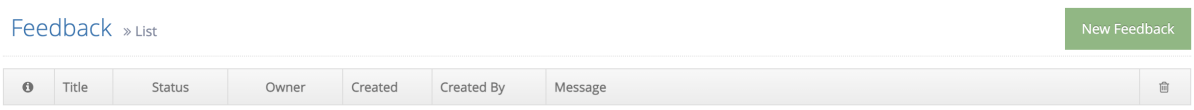
You can use Polixen to capture Feedback from your customers and action on Complaints for clients and staff.

These features are located under “Feedback” on the left-hand side menu.

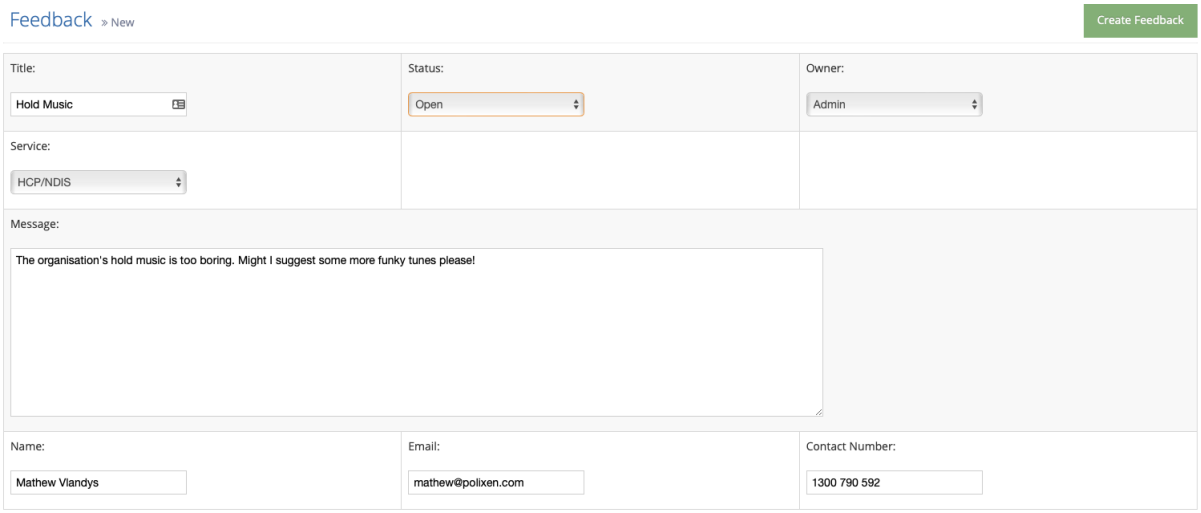


Feedback

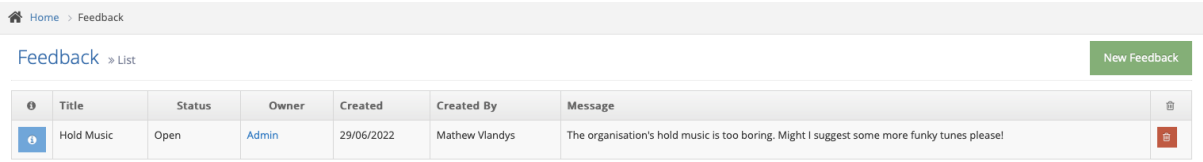
To create a new feedback item, simply click on the green “**New Feedback”** button.



That will open a page where you can fill out the relevant fields, such as Title, Status, Owner, Service and Message. Hit **“Create Feedback”** to save it.



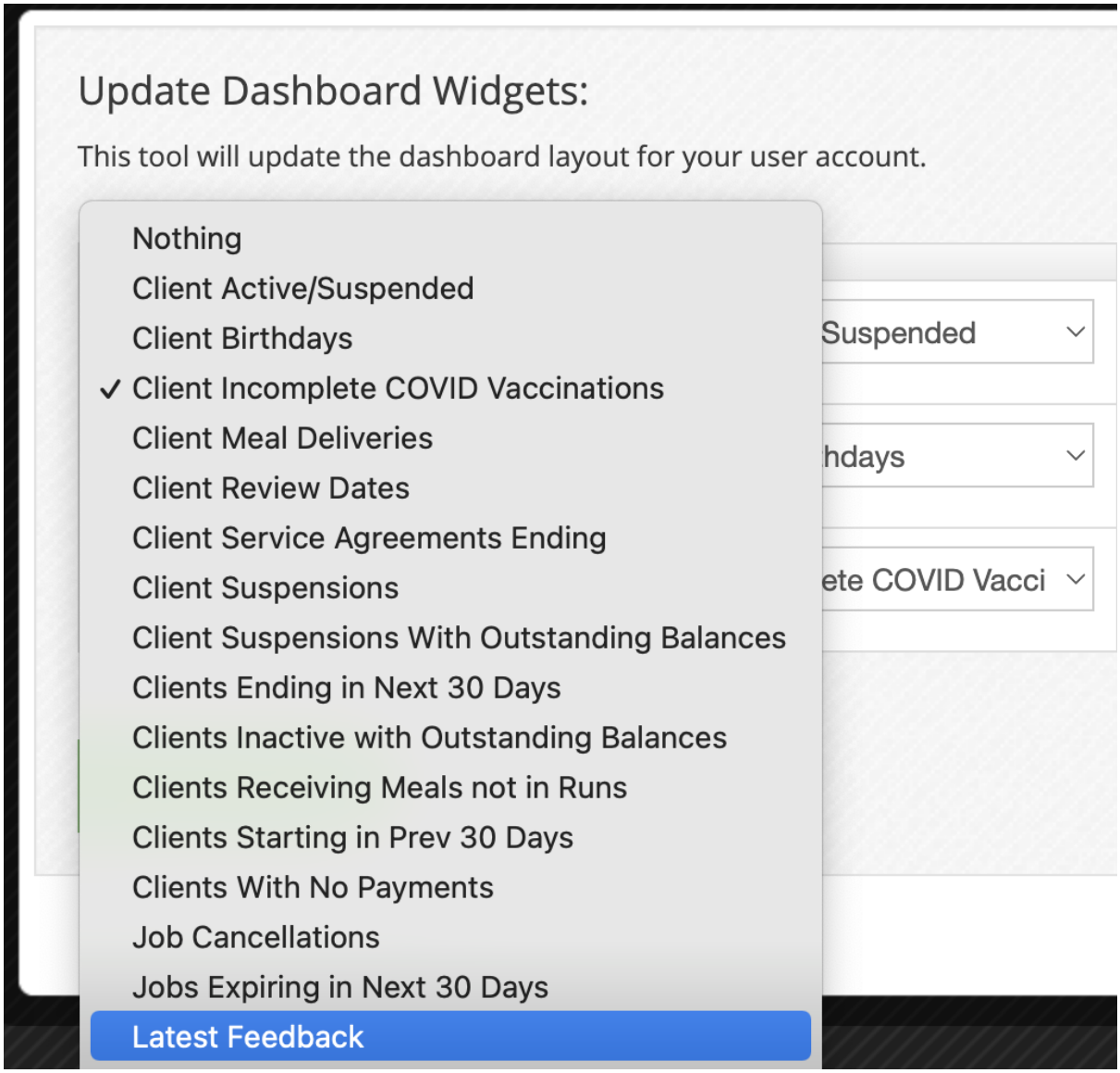
Once you've done that, the feedback will be added to the Feedback list.



Latest Feedback Dashboard Widget

There's also a dashboard widget you can use to view feedback items created in the last 14 days. This widget is named "**Latest Feedback".**

To add this widget to your system, simply click in the top right corner of Polixen where it says "Welcome <your name>", then click on "Settings" and "Change User's Dashboard Widgets".



Feedback Permissions

All staff members in your Polixen system will have access to read and create feedback items. The ability to update or delete feedback items requires the following permissions:

- **Feedback-update**
- **Feedback-delete.**

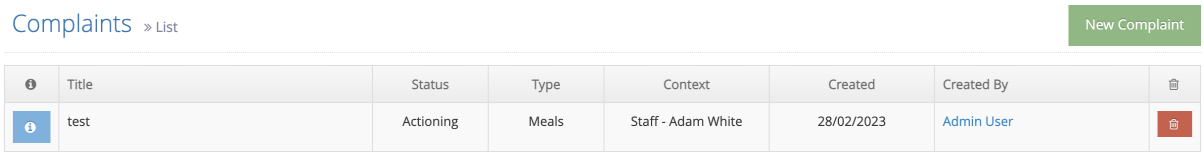
Please head to Staff Privileges to check how to add permissions to staff.

Complaints

To go alongside the Feedback module, we also have the **Complaints** module; a place for actionable items to follow up on and record an investigation.

This module is found under the **Feedback > Complaints** menu item.

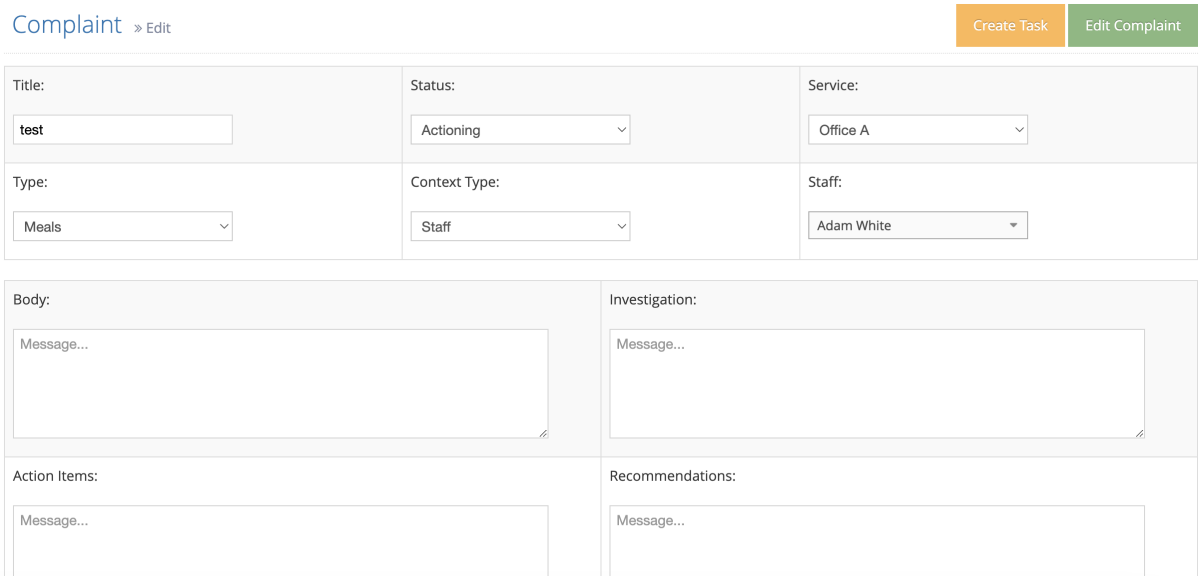
The main page lists all of the complaints in the system. Here, you can view or delete an existing complaint entry.



To create a complaint, go to **“New Complaint”** on the top right. When creating a new complaint, there are several drop-down fields.

For example, the **context type** lets you link the complaint item to a client or staff member. There are also text fields to record the outcomes of the complaint, including “Investigations”, “Action Items” and “Recommendations”.

You can also select a status for the complaint, including “Open”, “Investigating”, “Actioning” and “Resolved”.

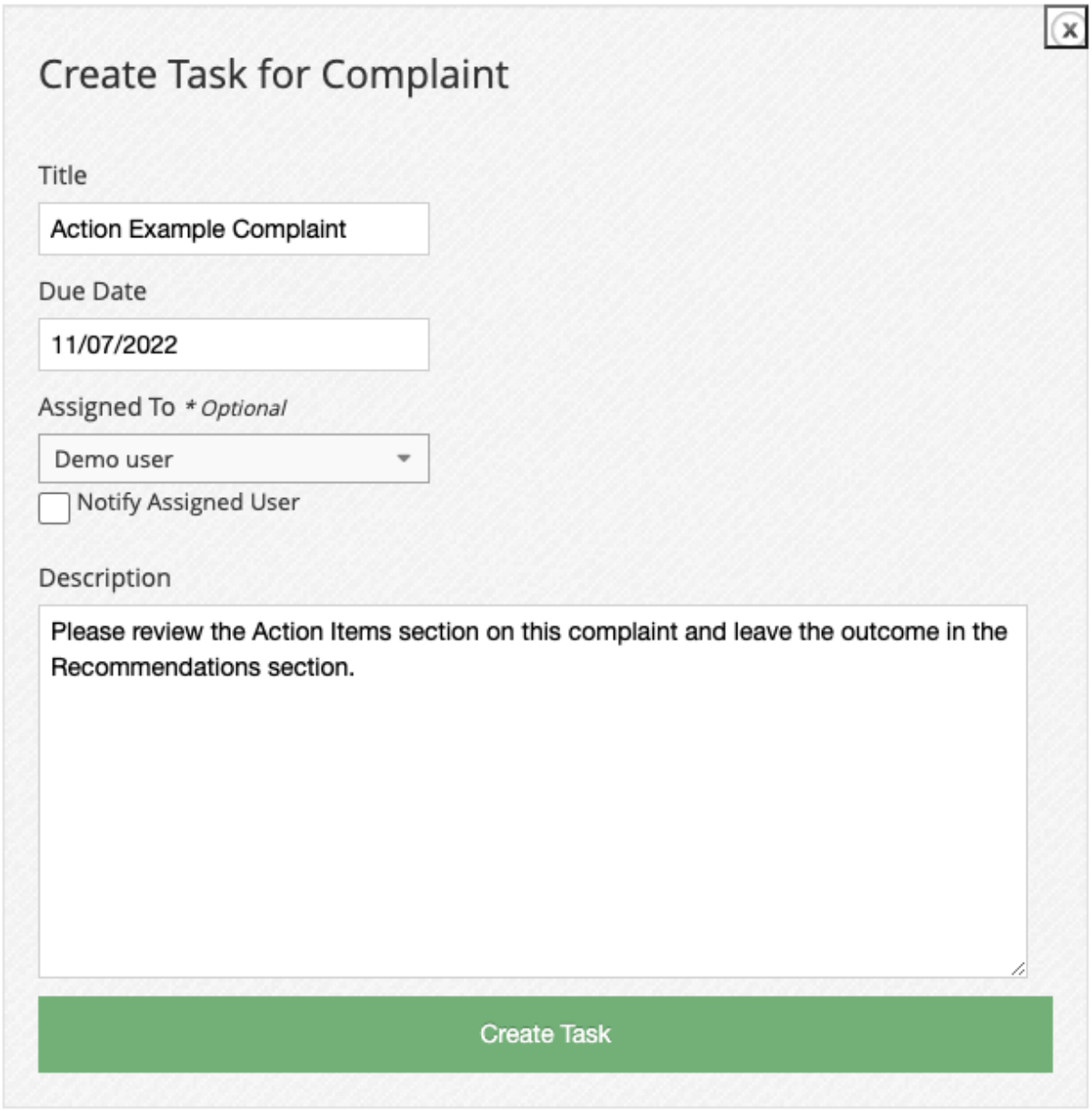


Create Task

The complaints module also has the option to create tasks for a complaint. To do that, click on the “Create Task” button on the top right-hand side.

A pop-up message will appear where you can add the task title, due date and description. There is also the option to assign a task to a user and notify them about it.

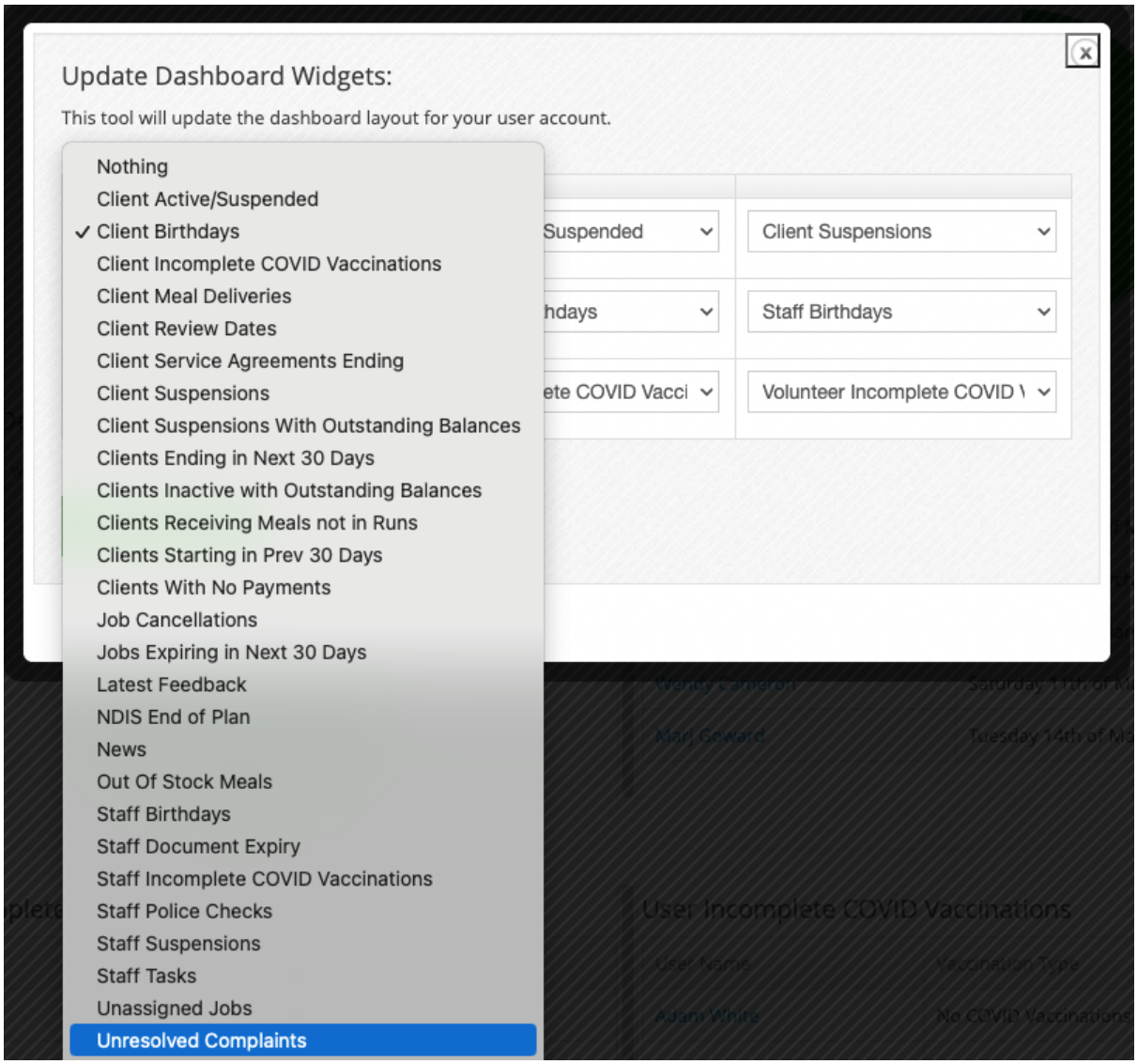
Hit “Create Task” to save it and add it to the task list.



Unresolved Complaints Dashboard Widget

There is a dashboard widget you can use to view all unresolved complaints. This widget is named

Unresolved Complaints. To add it to your system, simply click on the top right corner of Polixen where it says "Welcome <your name>", then click on “Settings”, then click on “Change User's Dashboard Widgets”.



Complaints Permissions:

No staff members in your Polixen system will have access to the complaints module. You will need to assign one or more of the following permissions:

- **Complaint-create**
- **Complaint-read**

- **Complaint-update**
- **Complaint-delete**

Please head to Staff Privileges to check how to add permissions to staff.