



Setting up Customer Happiness Rating

Listen to the voice of your customers by enabling customer happiness ratings in Zoho Desk. Happiness rating helps you get a glimpse of what your customers think about the support they receive at the end of each response or closing their ticket. The built-in analytics will also help you keep track of the ratings received by the agents or left by your contacts and accounts over different time periods.

Note: The customer happiness rating is available only from the *Standard Edition* and above.

Permission Required

Users with the **Customer Happiness Ratings** administrative permission can access this feature.

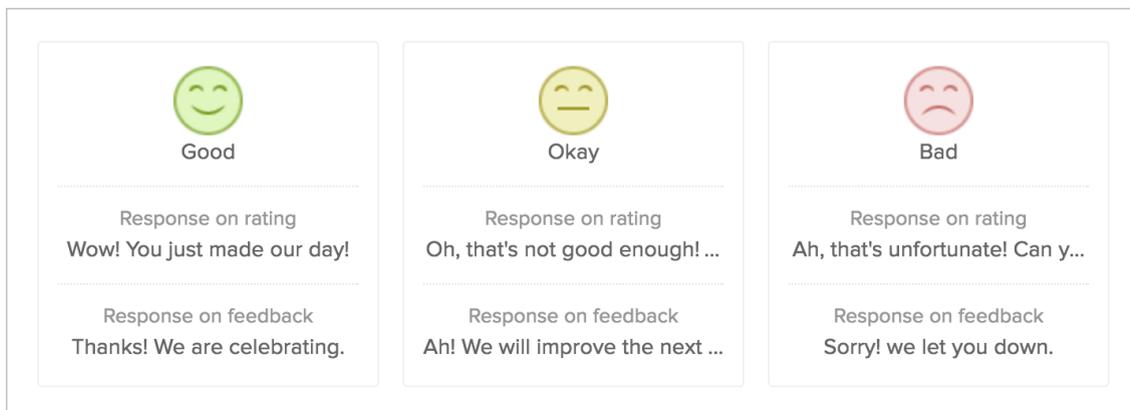
[Check Feature Availability and Limits](#)

Enabling Happiness Ratings

You must enable happiness ratings to receive feedback from your customers.

To enable happiness ratings:

1. Go to **Setup** () > **Organization** > **Customer Happiness**.
2. In the *Customer Happiness* page, click **Get Started**.
3. In the *Rating Configuration* page, provide the following:
 - **Rating Question:** Enter a question you like to pose to customers to describe how satisfied they are with your customer service.
 - **Ratings:** These are the options your customers choose to describe their experience. You are provided with three rating options, namely: **Good**, **Bad**, and **Okay**. You can disable the 'Okay' rating if you don't want your customers to be neutral.



- **Add Rating Link:** This is the link that your customers should click to leave a rating. You can choose to add the link -

- **To every response sent:** The link is added to the ticket responses sent by your agents
 - **When a ticket is closed:** The link is sent over a notification template (Ticket Closed) on closing the tickets
- **Rating Link:** You can choose to show or hide the smileys in the rating link. Choose one amongst the following options -
 - **Will have rating question alone:** The link displays only the question
 - **Will have rating question with smileys:** The link displays the smileys under the question
- **Rating link accessible to:** Select who can rate tickets and where. Choose one amongst the following options -
 - **Anyone on the internet:** Anyone on the internet with the rating link can view and rate the ticket. This is the default accessibility option for happiness ratings
 - **Requesters and cc'd users:** Requestors and cc'd users can access the rating link on email replies, but not on the Help Center. This option can be an ideal choice if you want to conceal the link from your agents
 - **End users:** End users can access the rating link while others will be prompted to sign up for your help center. End users will include the ticket's original requestor, cc'd users, and other users of the requestor's organization
- **Display Widget in the Help Center:** Enable this option if you'd like to display the ratings in your Help Center.
- **Show Agent Photo:** Enable this option to add the picture of the agent in the rating form.
- **Reopen Ticket:** You can choose to reopen a ticket when it receives a rating. A ticket can be reopened only on having received a negative rating or for all ratings.
- **Enable Survey:** You can enable happiness ratings for one or more of your departments. Specify the departments from the drop-down menu.
- **Notify Ticket Owner For:** You can notify the ticket owners when they receive ratings from the customers. You can choose to be notified only having received a negative rating or for all ratings.
- You can notify the Supervisors or the Support Managers about the negative ratings received in your help desk. Specify the other users from the list view.

4. Click **Save**.

Note:

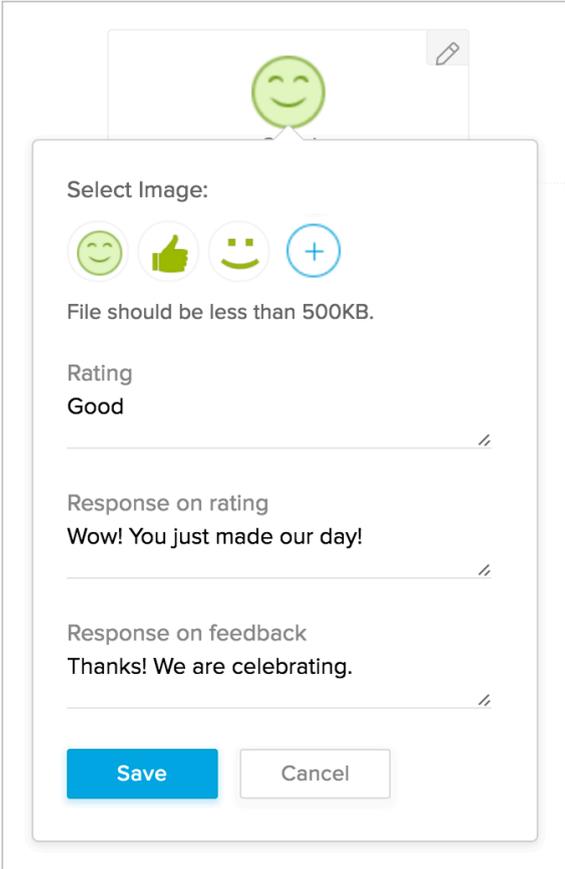
- Customers cannot opt-out of receiving rating requests.
- Happiness rating is per response or ticket, and not per customer.
- The rating link is a one-time URL, so customers can't change their rating by re-accessing it from their email.

Customizing Rating Options

Personalize the default rating options provided in Zoho Desk. You can customize the smileys, rating text, and the response displayed after rating a ticket.

To personalize rating options:

1. Go to **Setup** () > **Organization** > **Customer Happiness**.
2. In the *Customer Happiness* page, do the following:
 - o Click the **Edit** icon () over a rating.
 - o In the *Edit Rating* window, select a **smiley** from the options provided. You can click the **Add** icon () to browse and select an image from your machine.
 - o Customize the text for rating; response shown on selecting a rating and on providing feedback.
 - o Click **Save** within the window.
3. In the *Customer Happiness* page, click **Save**.



Select Image:

File should be less than 500KB.

Rating
Good

Response on rating
Wow! You just made our day!

Response on feedback
Thanks! We are celebrating.

Save Cancel

You can follow the above steps to customize the other rating options provided in Zoho Desk.

Customizing Place Holder for Ratings

The location of the rating placeholder can be customized according to your business requirements. However, its default location depends upon the option you chose, while enabling happiness ratings.

1. When you opt to add the rating link in all of the ticket responses, the link is displayed just below the agent's signature. An agent, while replying to a ticket, can copy-paste the link anywhere within the reply editor.

Dear Gordon,
The issue is temporary. Can you try doing a factory reset?
That should reset everything to defaults. You shouldn't have any problems after that!
Cheers,
Warren
[How would you rate our customer service?](#)

2. When you opt to send the rating link only on closing a ticket, the link is displayed above the agent's signature in the email notification sent for a closed ticket. You can customize its location in 'Closing a Ticket' notification email under Setup. Please note that the system will automatically enable the closed ticket notifications on selecting this option. You can disable the closed ticket notification, but make sure you've set up a workflow trigger to ask for ratings.

Dear Gordon,
Your request numbered 251113 has been closed. We hope we've addressed your question/issue to your satisfaction.
Please feel free to reach out to us if you need any help.
In the meantime, we'd like to know:
[How would you rate our customer service?](#)

Leaving a Feedback

Customers can access the rating link to rate their most recent support experience. In the rating page, they can select a rating option and leave a short description of their experience. The feedback page also displays the agent's picture and the business logo to add some personality to your feedback management system.

Viewing Ratings on Tickets

Ratings left by your customers are threaded to the relevant tickets in Zoho Desk. You can view the ratings and its associated feedback by selecting the thread in a ticket.

Displaying Ratings in Help Center

Show off how good you are in customer service by displaying the rating widget in your Help Center. Your customers can view the overall percentage of Good, Okay, and Bad ratings received in your help desk. They can also view the last 100 ratings received. The widget is dynamic that the data is recalculated every time you receive a new rating.

The widget can be displayed by enabling the '**Display Widget in the Help Center**' option under Customer Happiness settings.

Rating for Tickets Created Over Phone

Measuring customer happiness for tickets created over the phone is as important as those received via email. Zoho Desk allows you to send a rating link when a ticket created over the phone is closed.

To send the rating link:

1. Go to **Setup** () > **Workflows** > **Automation**.
2. In the *Workflow Rules* page, click **Create Rule** in the upper right corner.
3. In the *New Workflow* page, create a workflow rule, as suggested below:
 - o **Module** - Tickets
 - o Enter a **Rule Name**
 - o **Execute on** - Create
 - o **Rule Criteria** - Status <contains> Closed & Channel <contains> Phone
 - o Under the *Actions* menu, click the icon to add a **New Alert**
 - o In the *New Alert* window, select the **email template** for customer happiness rating
 - o Under *Notify*, check the **Contact** option
 - o Click **Save**
4. Click **Save** on the New Workflow page.

This workflow rule triggers the email containing the rating link when tickets are closed.

Ratings for Chat

Visitors can rate their chat experience as good or bad. The chat feedback received from customers will help you improve your chat support channel. You can also find agents who are most successful in providing quality chat support.

The departments that are enabled for chat support will, by default, display the rating options at the end of the chat sessions.

Disabling Happiness Ratings

You can disable the happiness rating question from being sent to your customers at any point in time.

To disable ratings:

1. Go to **Setup** () > **Organization** > **Customer Happiness**.
2. In the *Customer Happiness* page, click on the **toggle** at the top of the page.

You have now disabled happiness ratings for your Zoho Desk.