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How do I prevent satisfaction survey requests being sent to particular users?

Paul Davies - 2023-09-15 - Comments (0) - Business Rules

For a number of reasons, you might want to exclude particular users from being sent satisfaction survey requests.

In Deskpro, satisfaction survey requests are sent using an Escalation.

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As you can see, the default built-in escalation does not allow for custom criteria which are integral in allowing for selective survey requests - so it is necessary to create a custom escalation:

- 1. Under Admin > Business Rules > Escalations, click + New.
- 2. Determine the Event properties for sending the request. In this example, we've selected the same properties as the default Escalation.
- 3. Save the Escalation, so you can return to it in a moment.
- 4. Under Admin > Ticket Structure > Ticket Labels, click Add.

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1. Create a new Label, titled something like 'Do not send survey'.

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- Return to Admin > Business Rules > Escalations, and click on the unfinished Escalation.
- Under Criteria, add criteria, and select Ticket Labels does not contain 'do not send survey'
- 3. Under Actions, add action, and select Send User Email Ticket Rating Request
- 4. Click Save
- 5. Then go back and disable the default Escalation.

Now whenever you would like to exclude a ticket from being sent a Satisfaction Survey request, simply attach the "Do not send survey" label to the ticket.