

Appeals

Overview:

- **Appeals (Question level change request)**
 - **More configurability than original CR**

Initial Project Set up

- **Enable Q-Level CR for client**
- **Enable for survey**
- **Define permissions/
notifications**
- **Define Q Eligibility**
- **Add CR Widget to Cham Shop
View**

Enable Appeals


Question-Level Manager Change Request

Welcome to Change Request

Client:

Retail Corporation ▼

Survey Name	Status	Actions
Clothing Store (#1181)	active	Edit Change Request Settings Disable



Define Perms/Notifications

Question-Level Manager Change Request

Retail Corporation — Clothing Store

Set up your permissions and notifications below.

Survey Settings

User Access	User Type	View/Discussion Access	Receive Notifications	Initial Owner *
	Location Manager (Level 1)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
	District Manager (Level 2)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
	Region Manager (Level 3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
	Client Supervisors	<input type="checkbox"/>	<input type="checkbox"/>	n/a
	Client Masters	<input type="checkbox"/>	<input type="checkbox"/>	n/a
Additional managers				
	SurfMerchants Master <input type="button" value="x"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
<input type="button" value="+ Add additional manager"/>				

* Initial owner is the person who will receive the newly submitted requests.

Define Question Eligibility

* All questions default to Eligible

Use this tool to define the Change Request eligibility of each question.

FILTERS: All Formats ▼ All Sections ▼

<input type="checkbox"/> Question Eligibility	QID	Question	Format	Sections
<input type="checkbox"/> Eligible ▼	1	Date shop performed	Date	
<input type="checkbox"/> Eligible ▼	11	Did an associate greet you upon entering?	Yes - No	1: Greeting
<input type="checkbox"/> Eligible ▼	41	Were you offered assistance?	Yes - No - N/A	2: Service
<input type="checkbox"/> Eligible ▼	21	Were the fitting rooms clean?	Yes - No	2: Service
<input type="checkbox"/> Eligible ▼	51	Were the restrooms clean?	Yes - No - N/A	2: Service
<input type="checkbox"/> Eligible ▼	31	Did the cashier?	Multi-Checkbox	3: Purchase
<input type="checkbox"/> Eligible ▼	61	Please provide details about your visit:	Narrative	3: Purchase
<input type="checkbox"/> Eligible ▼	Apply Category to Selected Rows			

◀ Go Back to Survey-Level Configuration

Save Progress 🏠

Save and Finish 🏠

Submitting New CR

QUESTION LEVEL CHANGE REQUEST

Add

Submit New Change Request

New Change Request Details

Shop Date

2017-09-15

Select Question

Name of Team Member that greeted you upon arrival:

Grayed out questions already have a change request submitted.

Response

Morgan

Waiting on:

SurfMerchants Admin ()

Status:

New

Morgan was not working on 9/15

There are 0 attachment(s) on this message.

Submit New Change Request

Change Request Submitted

Your change request has been successfully submitted. It will reviewed by the designated handler.

Add another change request

View all change requests for this shop

Close

Reviewing CRs

Manager Report
Change Request Log ▼

Resolved Status:
Show shops with change requests waiting on: ☒ Anyone ☐ Me
Shop ID:
ADDITIONAL TEXT TO DISPLAY BENEATH REPORT

CHANGE REQUEST LOG

Companywide Report
1/1/2018 - 12/31/2018

Shop ID	SHOP DATE	LOCATION ID	LOCATION NAME	COUNTRY	% RESOLVED	ITEMS WAITING ON ME	VIEW CHANGE REQUESTS
00411733	2018-02-01	549	Reno South	United States	0/1 (0%)	1	View Change Requests

Change requests highlighted in **red** are waiting on you.

Filters:

QID	QUESTION	SUBMITTED BY	WAITING ON	DATE OPENED	DATE UPDATED	STATUS	ISSUE TYPE	DISCUSSION
--	General Change Request (No specific question)	SurfMerchants Admin	SurfMerchants Admin	2018-02-19	2018-02-19	New	Unspecified	View Discussion

Reviewing CRs Discussion

Change Request Discussion

Shop ID: 8041733 Location: 549 - Reno South

Client Shop
View

View

Review

Shop Date 2018-02-01


Question General Change Request (No specific question)

Original Response

Issue Type Unspecified ▼ **Only visible to admins**

Waiting on: Select a User ▼ *currently: SurfMerchants Admin*

Status: New ▼ ☐ Locked (once selected, users cannot make changes) **Locked - Admin Only**



Enter change request details.

Submit

There are 0 attachment(s) on this message.

SurfMerchants Admin (Admin) 2018-02-19 12:21:21

Test

Please let Us Know If
You Have Any
Questions