

TOOL USER GUIDE

CUSTOMER COMPLAINT MANAGER



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1. HOW TO ACCESS CUSTOMER COMPLAINTS

Step 1: Sign in and go to *Customer Complaints Manager* under Supplier Approval

The screenshot shows the Foods Connected dashboard. The top navigation bar includes 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and a user profile 'Steve'. The 'Supplier Approval' dropdown menu is open, showing options: 'Specification Manager', 'Product Check Manager', 'Customer Complaint Manager' (highlighted with a red box), 'Internal Document Manager', 'Internal Check Manager', and 'Workflow Manager'. The main content area shows 'Latest News' with articles about sustainability and gut health. On the right, there's a 'My Tasks' section with 88 outstanding tasks, including 'Elaine Rogers responded to a questionnaire' and 'Kevin Smyth responded to a supplier check'. At the bottom, there's an 'Activity Feed' section with a filter for 'Showing: Site Activity' and a list of recent activities.

Step 2: This is your Customer Complaints tool

The screenshot shows the 'Customer Complaint Manager' interface. It has a top navigation bar with 'Complaint Templates', 'Received Customer Complaints', 'Activity Overview', 'Reports', and 'Admin'. Below this, there's a section for 'Currently viewing ALL SITES Customer Complaint Templates' with a 'Change Site' button. There are buttons for 'Add New', 'Duplicate Selected', and 'Delete Selected'. The main part of the interface is a table with the following data:

Last Modified	Title	Created By	Recorded	
01/04/2020 11:03:59	SB Customer Complaints Log	Steve Jones	3 Recorded	Record New
11/03/2020 11:06:14	Complaints Log	Steve Jones	21 Recorded	Record New

At the bottom, there's a pagination bar showing '25 50 100' and navigation links: '<< first', '< previous', 'next >', and 'last >>'.

1.1 HOW TO VIEW COMPLETED CUSTOMER COMPLAINTS

Step 1: Once a check is complete, go back to the Customer Complaints Manager and select *view recorded* on the form that you used

Customer Complaint Manager

[Complaint Templates](#)
[← Received Customer Complaints](#)
[Activity Overview](#)
[Reports](#)
[Admin](#)

 Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#)

Viewing 3 results | Page 1 of 1

[Add New](#)
[Duplicate Selected](#)
[Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input type="checkbox"/>	05/05/2020 10:06:34	New Check	Steve Jones	0 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	22 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	22 Recorded	Record New	

 25 50 100 | [<< first](#) [< previous](#) [next >](#) [last >>](#)

Step 2: A list of all the completed & pending checks will show

Customer Complaint Manager

Recorded - Complaints Log

[← Back to Customer Complaint Templates](#)

Customer Complaint has been successfully shared

Between Dates	Customer	Product	Status	Sent To	
<input type="text"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	Filter
<input type="text"/>					Clear Filters

[Delete Selected](#)
[Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Product	Recorded By	Sent To	Status	
<input type="checkbox"/>	05/05/2020 10:41:08	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Lauren Bush	Requires Your Action	
<input type="checkbox"/>	05/05/2020 10:00:45	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Steve Jones	Closed	
<input type="checkbox"/>	11/03/2020 11:10:52	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	---	In Progress	
<input type="checkbox"/>	10/10/2019 13:00:09	Supermarket 1	10009876 - Potato wrap prawns	Steve Jones	Eric Knowles	Awaiting Response	
<input type="checkbox"/>	15/04/2019 16:05:16	Supermarket 4	1000245 - Aromatic Crispy Duck	Steve Jones	Lauren Bush	Closed	

Step 3: You can view each Complaint by selecting **View Complaint**. From here you can also edit the check, share it, request more info or Close complaint

Customer Complaint Manager

Recorded - Complaints Log

[← Back to Customer Complaint Templates](#)

Between Dates:

Customer:

Product:

Status:

Sent To:

[Filter](#) [Clear Filters](#)

[Delete Selected](#) [Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Product	Recorded By	Sent To	Status	
<input type="checkbox"/>	05/05/2020 10:00:45	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Steve Jones	Closed	View Complaint
<input type="checkbox"/>	11/03/2020 11:10:52	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	---	In Progress	Edit Details
<input type="checkbox"/>	10/10/2019 13:00:09	Supermarket 1	10009876 - Potato wrap prawns	Steve Jones	Eric Knowles	Awaiting Response	Send PDF Report
<input type="checkbox"/>	15/04/2019 16:05:16	Supermarket 4	1000245 - Aromatic Crispy Duck	Steve Jones	Lauren Bush	Closed	Share
<input type="checkbox"/>	15/04/2019 16:03:01	Supermarket 4	1000457 - Dim Sum selection	Steve Jones	Lauren Bush	Awaiting Response	Recall Complaint
							Request More Info
							Close Complaint

Step 4: The completed check with investigation details will look like this below



Demo Co

100 Patrick Street
Derry
BT48 7EL
United Kingdom

Supermarket 2

Falcon Way
Shire Park
Welwyn Garden City
London
Hertfordshire
AL7 1TW
United Kingdom
Date: 05/05/2020

Title	Complaints Log
Customer	Supermarket 2
Product	10009876 - Potato wrap prawns
Date Recorded	05/05/2020 10:00:45
Recorded By	Steve Jones

Complaint details

Demo Foods reference	123456
Date Demo Foods received	05/05/2020
Customer REF	54321
Response required	Yes
Product Category	Frozen
Factory Code	EC010101
Finished product name	10009876 - Potato wrap prawns
Raw material code	ASFPWP002
Product	10009876 - Potato wrap prawns
Trace code	UB: 17 Dec 2016, LF341 09:16 093
Complaint Type	FB-Hair
Complaint Category	Foreign Body

Complaint Detail

Hair found in food

Response

Investigation details

Demo REF	Ref
Investigation start date	04/05/2020
Investigation end date	05/05/2020
Comments & Investigation details	Enter comments here
Root cause of issue	Root cause here
Preventative action taken	Preventative actio here

Updates History

Delete Selected

<input type="checkbox"/>	Date	Update By	Update Description
<input type="checkbox"/>	05/05/2020	Steve Jones	Responded to Customer Complaint
<input type="checkbox"/>	05/05/2020	Steve Jones	Shared customer complaint form with Steve Jones
<input type="checkbox"/>	05/05/2020	Steve Jones	Recorded Customer Complaint

1.2 HOW TO VIEW CUSTOMER COMPLAINTS AWAITING INVESTIGATION

Step 1: Once a check is awaiting investigation, go back to the Customer Complaints Manager and select **view recorded** on the form that you used


Customer Complaint Manager					
<div>Complaint Templates</div> <div>← Received Customer Complaints</div> <div>Activity Overview</div> <div>Reports</div> <div>Admin</div>					
<div>Currently viewing ALL SITES Customer Complaint Templates Change Site</div> <div>Viewing 2 results Page 1 of 1</div>					
<div>Add New Duplicate Selected Delete Selected</div>					
<input type="checkbox"/>	Last Modified	Title	Created By		
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	<div>Click to view recorded</div> <div>4 Recorded</div>	Record Now
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record Now

Step 2: A list of all the completed, Awaiting Response & Requires Your Action checks will show

Customer Complaint Manager

Recorded - SB Customer Complaints Log

[← Back to Customer Complaint Templates](#)

Between Dates:  

Customer:

Product:

Status:

Sent To:

Complaint details:

[Filter](#) [Clear Filters](#)

[Delete Selected](#) [Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Complaint details	Product	Recorded By	Sent To	Response Required By	Status	
<input type="checkbox"/>	26/06/2020 12:35:04	Supermarket 2		None	Steve Jones	Steve Jones	---	Awaiting Response	
<input type="checkbox"/>	01/04/2020 10:35:13	Supermarket 2	Quality	111112 - Tesco all day breakfast	Steve Jones	---	---	In Progress	
<input type="checkbox"/>	01/04/2020 10:17:35	Supermarket 2	Quality	1111 - Scrambled egg	Steve Jones	Eric Knowles	---	Closed	
<input type="checkbox"/>	01/04/2020 10:03:08	Supermarket 1	Quality	10005678 - Coconut Prawn Mang	Steve Jones	Eric Knowles	---	Requires Your Action	

Step 3: You can view each Awaiting Response Complaint by selecting *View Complaint*.

Customer Complaint Manager

Recorded - SB Customer Complaints Log

[← Back to Customer Complaint Templates](#)

Between Dates:  

Customer:

Product:

Status:

Sent To:

Complaint details:

[Filter](#) [Clear Filters](#)

[Delete Selected](#) [Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Complaint details	Product	Recorded By	Sent To	Response Required By	Status	
<input type="checkbox"/>	26/06/2020 12:35:04	Supermarket 2		None	Steve Jones	Steve Jones	---	Awaiting Response	
<input type="checkbox"/>	01/04/2020 10:35:13	Supermarket 2	Quality	111112 - Tesco all day breakfast	Steve Jones	---	---	In Progress	
<input type="checkbox"/>	01/04/2020 10:17:35	Supermarket 2	Quality	1111 - Scrambled egg	Steve Jones	Eric Knowles	---	Closed	

[View Complaint](#)[Edit Details](#)[Send PDF Report](#)[Share](#)**Step 4:** It will show like this below

Demo Co

100 Patrick Street
Derry
BT48 7EL
United Kingdom

Supermarket 2

Falcon Way
Shire Park
Welwyn Garden City
London
Hertfordshire
AL7 1TW
United Kingdom
Date: 05/05/2020

Title	Complaints Log
Customer	Supermarket 2
Product	10009876 - Potato wrap prawns
Date Recorded	05/05/2020 10:00:45
Recorded By	Steve Jones

Complaint details

Demo Foods reference	123456
Date Demo Foods received	05/05/2020
Customer REF	54321
Response required	Yes
Product Category	Frozen
Factory Code	EC010101
Finished product name	10009876 - Potato wrap prawns
Raw material code	ASFPWP002
Product	10009876 - Potato wrap prawns
Trace code	UB: 17 Dec 2016, LF341 09:16 093
Complaint Type	FB-Hair
Complaint Category	Foreign Body

1.3. HOW TO CHANGE THE SITE YOU ARE VIEWING CUSTOMER COMPLAINTS FOR



Step 1: At the top of the page you can see what sites you are viewing

Customer Complaint Manager

[Complaint Templates](#)
[Received Customer Complaints](#)
[Activity Overview](#)
[Reports](#)
[Admin](#)

Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#)
Viewing 2 results | Page 1 of 1

[Add New](#)
[Duplicate Selected](#)
[Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New 
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New 

Step 2: To change this, simply select **Change Site**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#) Viewing 2 results | Page 1 of 1

[Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New

Step 3: Select the site from the dropdown box and the view in the table below will change. Simply follow the steps above to set your favoured view.

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

All Sites ☐ **All Sites** ☒ **IPL (Group)** ☐ [Duplicate Selected](#) [Delete Selected](#) Viewing 2 results | Page 1 of 1

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New

2. SETUP

2.1 HOW TO CREATE A COMPLAINT TEMPLATE

Step 1: Sign in and go to **Customer Complaints Manager** under Supplier Approval

The screenshot shows the 'Supplier Approval' dropdown menu open. The 'Customer Complaint Manager' option is highlighted with a red box. Other options in the menu include 'Specification Manager', 'Product Check Manager', 'Internal Document Manager', 'Internal Check Manager', and 'Workflow Manager'. The background shows the 'Home' page with 'Latest News' and 'My Tasks' sections.

Step 2: Select **Add New**

Customer Complaint Manager

[Complaint Templates](#)
[← Received Customer Complaints](#)
[Activity Overview](#)
[Reports](#)
[Admin](#)

 Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#)

Viewing 2 results | Page 1 of 1

[Add New](#)[Duplicate Selected](#)[Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input type="checkbox"/>	01/04/2020 11:03:59	SB Customer Complaints Log	Steve Jones	3 Recorded	Record New	List
<input type="checkbox"/>	11/03/2020 11:06:14	Complaints Log	Steve Jones	21 Recorded	Record New	List

25 50 100 | << first < previous next > last >>

Step 3: This is where you setup the details for that *Customer Complaint Check*

Customer Complaint Manager

Edit Customer Complaint Template

[← Back to Customer Complaint Templates](#)

Site

☒ Demo Co (Group)

☒ Factory 1

☒ Factory 2

☒ Factory 3

 Title
[Save & Edit](#)[Save & Exit](#)[Cancel](#)

Customer Complaint Form

Investigation Form

Confirmation Form

Set your check to a site.

Name your check.

Step 4: Once done above select *Save & edit* then select *Customer Complaint Form***Step 5:** Build your check using the form builder to suit your needs. To add a new section select *Add New Section*.

Customer Complaint Manager - Update Form

[← Back](#)

Template Name

[Save Title](#)

Edit Options

[Add New Section](#)

Form Preview

i You have not added any elements to your form yet. To get started, click 'Add New Section'.

New Section looks like this below

Customer Complaint Manager - Update Form

← Back

Template Name

New Check

Save Title

Edit Options

Add New

Reorder

Triggers

Form Preview

New section

Step 6: To add a new field or question select **Add New – Standard Field**

Customer Complaint Manager - Update Form

← Back

Template Name

New Check

Save Title

Edit Options

Add New

Reorder

Triggers

Form Preview

New section

 Section
Standard Field

Step 7: Now add in the details of the question & how you want it answered using the field types.

Add New Field

Field Label

What is the question?

Show

Section

New section

Field Type

Standard Dropdown - Single

Options

↑ Yes

↑ No

Add

Help Text

Guide your users with help text

Help Image

Choose file No file chosen

Required

☒ **N**
☐ Always
 ☐ Condition Based

Visible

☒ Always
 ☐ Condition Based

Cancel

Add Field

Enter your question here

Choose the field type or way to answer question

Choose the answers or options for the question

Help text is good to guide the user

Select if this question is required to be answered by the user

Select if this question is conditionally based on the answer of another question.

Select if this questions visibility on the check is conditionally based on the answer of another question.

Step 8: Once done select **Add Field**

Add New Field

Field Label: [Show](#)

Section:

Field Type:

Options:

- [✎](#) [✕](#)
- [✎](#) [✕](#)

[Add](#)

Help Text:

Help Image: No file chosen

Required: ☒ No ☐ Always ☐ Condition Based

Visible: ☒ Always ☐ Condition Based

[Cancel](#) [Add Field](#)

New Field looks like this below

Customer Complaint Manager - Update Form [← Back](#)

Template Name: [Save Title](#)

Edit Options: [Add New](#) [Reorder](#) [Triggers](#)

Form Preview

[✎](#) **New section** [✎](#) [↺](#) [↻](#)

[✎](#) **What is the question?** [✎](#)

Step 9: Repeat steps to build up your check, it might look like this below

Customer Complaint Manager - Update Form

[← Back](#)

Template Name

Complaints Log

[Save Title](#)

Edit Options

[Add New](#)[Reorder](#)[Triggers](#)

Form Preview


[✎](#) Complaint details [+](#) [↺](#)

[✎](#)

Demo Foods reference

[✎](#)

Date Demo Foods received



[✎](#)

Customer REF

[✎](#)

Response required

--Please Select--

▼

Enter a comment

[✎](#)

Product Category

--Please Select--

▼

[✎](#)

Factory Code

[✎](#)

Finished product name

--Please Select--

▼

[✎](#)

Raw material code

[✎](#)

Product

--Please Select--

▼

[✎](#)

Category

--Please Select--

▼

[✎](#)

Trace code

[✎](#)

Complaint Type

--Please Select--

▼

[✎](#)

Complaint Category

--Please Select--

▼

[✎](#)

Complaint Detail

2.1.1 HOW TO ADD EMAIL TRIGGERS

Email alerts are a feature that allows you to create a trigger when a certain answer is given to a question. This will then send an email to someone to notify them of the answer to the question.

Step 1: As you go along you can create **Email Alerts** & from the answers that have been chosen. To do this select **Triggers** & **Email Alerts**.

Customer Complaint Manager - Update Form

Template Name: Complaints Log [Save Title]

Edit Options: Add New, Reorder, Triggers, Email Alerts

Form Preview

- Complaint details
 - Demo Foods reference
 - Date Demo Foods received
 - Customer REF
 - Response required: --Please Select-- (comment box: Enter a comment)
 - Product Category: --Please Select--

Step 2: Now select **Add Alert**

Customer Complaint Manager - Update Form - New Check - Email Alerts

To add a new alert click the 'Add Alert' button below. When you are finished click the 'Done' button to return to the Form.

Add Alert

Field	Alert Rules	Recipients
You have not added any alerts..		

Cancel Done

Step 3: Now setup your alert. So what you are saying/dong here is if someone answers a question a certain way that answer will trigger an alert to a user.

Step 4: Select from **Field** the question

Customer Complaint Manager - New Check - Email Alerts

Field: New section - What is the question?

Field Option: Yes

Recipients: -- Please Select -- (Add to list)

Technical

Cancel Save

Step 5: Then select the answer from **Field Option** that will raise the trigger/alert

Customer Complaint Manager - New Check - Email Alerts [← Back to List](#)

Field: New section - What is the question?

Field Option: Yes

Recipients: -- Please Select -- [Add to list](#)

Technical [×](#)

[Cancel](#) [Save](#)

Step 6: Now add the user or team from **Recipients** that will receive the notification and select **Add to list**. Once done select **Save**.

Customer Complaint Manager - New Check - Email Alerts [← Back to List](#)

Field: New section - What is the question?

Field Option: Yes

Recipients: -- Please Select -- [Add to list](#)

Technical [×](#)

[Cancel](#) [Save](#)

Trigger setup will look like this below

Customer Complaint Manager - Update Form - New Check - Email Alerts [← Back](#)

To add a new alert click the 'Add Alert' button below. When you are finished click the 'Done' button to return to the Form.

[+ Add Alert](#) [Cancel](#) [Done](#)

Field	Alert Rules	Recipients	
New section - What is the question?	Option equal to Yes	Technical	Update ✖

Step 7: Repeat steps to add triggers to any question.

2.1.2 HOW TO DUPLICATE A COMPLAINT TEMPLATE

Step 1: Select the template you want to duplicate by ticking it

Customer Complaint Manager

[Complaint Templates](#) [← Received Customer Complaints](#) [Activity Overview](#) [Reports](#) [Admin](#)

Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#) Viewing 2 results | Page 1 of 1

[+ Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input checked="" type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New	⋮
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New	⋮

Step 2: Then select **Duplicate Selected**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Currently viewing ALL SITES Customer Complaint Templates Change Site Viewing 2 results | Page 1 of 1

Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input checked="" type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New	

Step 3: Your duplicate template will now show, ready to edit or use.

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Selected items have been successfully duplicated.

Currently viewing ALL SITES Customer Complaint Templates Change Site Viewing 3 results | Page 1 of 1

Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input type="checkbox"/>	21/08/2020 14:33:53	SB Customer Complaints Log - Copy	Steve Jones	0 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New	

2.1.3 HOW TO DELETE A COMPLAINT TEMPLATE

Step 1: Select the template you want to duplicate by ticking it

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Currently viewing ALL SITES Customer Complaint Templates Change Site Viewing 2 results | Page 1 of 1

Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input checked="" type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New	

Step 2: The choose *Delete Selected*

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Currently viewing ALL SITES Customer Complaint Templates Change Site Viewing 2 results | Page 1 of 1

Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input checked="" type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New	

Step 3: The template will now be deleted & it's history

2.1.4 HOW TO SETUP PRE-SET FIELDS FOR USE IN A COMPLAINT TEMPLATE

Pre-set fields allow you to create your own set of options or answers to questions so that you don't have to manually create them each time when building the template. So for this example, say you want to have, Yes, No & N/A as a dropdown option for your users to use.

Step 1: Go to the **Admin** section of the Customer complaints manager

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports **Admin**

Currently viewing **ALL SITES** Customer Complaint Templates Change Site Viewing 2 results | Page 1 of 1

+ Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	27 Recorded	Record New

25 50 100 | << first < previous next > last >>

Step 2: If there is already Pre-set fields created by your company they will look like this below. This is where they are managed.

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports **Admin**

Preset Fields Add/Manage preset fields which can be used when creating/editing a Customer Issue.

Uncategorised **Uncategorised** Add New Preset Field Manage Categories

Internal Description: Business Unit Default Label: Business Unit Field Type: Standard Dropdown - Single selection from custom options	2 Options [Show...]	Edit Delete
Internal Description: Categories Default Label: Category Field Type: Standard Dropdown - Single selection from custom options	7 Options [Show...]	Edit Delete
Internal Description: Complaint Category Default Label: Complaint Category Field Type: Standard Dropdown - Single selection from custom options	6 Options [Show...]	Edit Delete
Internal Description: Complaint Type Default Label: Complaint Type Field Type: Standard Dropdown - Single selection from custom options	9 Options [Show...]	Edit Delete

Step 3: To create a new set select **Add New Preset Field**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports ▾ Admin

Preset Fields

Add/Manage preset fields which can be used when creating/editing a Customer Issue.

Uncategorised

Uncategorised

Add New Preset Field

Manage Categories

Internal Description: Business Unit

2 Options [\[Show...\]](#)

Edit

Delete

Default Label: Business Unit

Field Type: Standard Dropdown - Single selection from custom options

Step 4: Give the Pre-set field an **Internal description**. That is Yes/No/N/A. Then choose the **Type** of field it will be.

Add New Preset Field

Internal Description

Yes/No/N/A

Default Label

Type

Dropdown - Single selection from ▾

Dropdown - Single selection from custom options

Dropdown with Quantity - single selection option with number

Checkbox - Multiple selection from custom options

Textbox Grid - Simple Grid populated with textboxes

Checkbox Grid - Simple Grid populated with checkboxes

Category

Options

Cancel

Add Field

Step 5: If you have categories setup for these pre-set fields choose the **Category** it should sit under. Then add the pre-set field **Options** which in this instance are Yes, No, N/A.

Add New Preset Field

Internal Description

Default Label

Type

Category

Options

Step 6: If you need to edit or delete an option, choose edit icon or delete icon to do so.

Add New Preset Field

Internal Description

Default Label

Type

Category

Options

Step 7: Once done select **Add Field**

Add New Preset Field

Internal Description

Yes/No/N/A

Default Label

Type

Dropdown - Single selection from

Category

Standard

Options

↑ Yes

✎ ✕

↑ No

✎ ✕

↑ N/A

✎ ✕

Add

Cancel

Add Field

Step 8: It will look like this in the *Standard* category.

Customer Complaint Manager

Complaint Templates

← Received Customer Complaints

Activity Overview

Reports

Admin

Customer Complaint Manager has been successfully updated.

Preset Fields

Add/Manage preset fields which can be used when creating/editing a Customer Issue.

Uncategorised

Standard

Add New Preset Field

Manage Categories

Internal Description: Yes/No/N/A

Default Label:

Field Type: Standard Dropdown - Single selection from custom options

3 Options

[Hide...]

• Yes

• No

• N/A

Edit

Delete

Step 9: To *Edit* select edit & follow steps above. And to delete simply select *Delete*

FOODS

CONNECTED

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Customer Complaint Manager has been successfully updated.

Preset Fields

Add/Manage preset fields which can be used when creating/editing a Customer Issue.

Uncategorised

Standard

Add New Preset Field

Manage Categories

Standard

Internal Description: Yes/No/N/A

3 Options [Hide...]

Edit

Delete

Default Label:

• Yes

Field Type: Standard Dropdown - Single selection from custom options

• No

• N/A

2.2 HOW TO CREATE AN INVESTIGATION TEMPLATE

An Investigation form is the form that is used for your users to answer any queries that have been raised during the complaint. After you build the initial complaint form follow the steps below

Step 1: Go back to the main table and select the radio button to the right of your check & select **Edit Investigation Template**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Currently viewing ALL SITES Customer Complaint Templates Change Site

Viewing 3 results | Page 1 of 1

Add New

Duplicate Selected

Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 10:06:34	New Check	Steve Jones	0 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	3 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	21 Recorded	Record New

25 50 100 | << first < previous next > last

FOODS
CONNECTED

Quick Links

Supported By

View Recorded
Analyse Recorded
Completed Snapshot Report
Edit Details
Edit Complaint Template
Edit Investigation Template

Step 2: Follow the steps above that you used to build the actual Complaint Template to build the Investigation Template. The same functions are used. Your form may end up looking like this example.

Investigation Details

☒ Investigation

☒ Corrective Action / Comments

☒ Immediate Action / Comments

☒ Root Cause / Control Measures

☒ Preventative Action / Comments

☒ Evidence

No file chosen

No file chosen

No file chosen

☒ Policies

No file chosen

2.3 HOW TO CREATE A CONFIRMATION FORM

A confirmation form is a form you can create to help you with verification and checking that the Complaint has been fully & adequately completed. It is a list of questions you might ask yourself to check before confirmation. You can choose to use this or not.

Step 1: Select dropdown beside the Complaint & select **Edit Confirmation Template**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Currently viewing ALL SITES Customer Complaint Templates Change Site

Viewing 3 results | Page 1 of 1

Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 10:06:34	New Check	Steve Jones	0 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	3 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	21 Recorded	Record New

25 50 100 | << first < previous next > last

Quick Links

Supported By

[View Recorded](#)
[Analyse Recorded](#)
[Completed Snapshot Report](#)
[Edit Details](#)
[Edit Complaint Template](#)
[Edit Investigation Template](#)

Step 2: From here you follow the same steps 5 to 7 in Creating a customer complaints template to create your confirmation template.

Step 3: It might end up looking like this

Customer Complaint Manager - Update Form

Back

Edit Options

Add New Reorder

Complaints Log - Confirmation Template - Form Preview

☒ Confirmations

☒ Has the issue been investigated?

--Please Select--

☒ Was the root cause discovered?

--Please Select--

☒ Has action been taken to prevent?

--Please Select--

☒ Are you happy with the result?

--Please Select--

☒ Response time in days

☒ Has the customer been notified?

--Please Select--

☒ What date where they notified?

3. CUSTOMER COMPLAINT USAGE

3.1 HOW TO RECORD A CUSTOMER COMPLAINT

Step 1: Go to Customer Complaints Manager

The screenshot shows the Foods Connected dashboard. The top navigation bar includes 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'Steve'. The 'Quality Management' dropdown menu is open, showing options: 'Specification Manager', 'Product Check Manager', 'Customer Complaint Manager' (highlighted with a red box), 'Internal Document Manager', 'Internal Check Manager', and 'Workflow Manager'. The main content area shows 'Latest News' with articles about sustainability, digestive health, and Beyond Meat. A 'My Tasks' sidebar on the right shows 88 outstanding tasks. At the bottom, an 'Activity Feed' shows a recent internal check completion.

Step 2: Select **Record New** beside the form you want to use

The screenshot shows the 'Customer Complaint Manager' interface. It includes a top bar with 'Complaint Templates', 'Received Customer Complaints', 'Activity Overview', 'Reports', and 'Admin'. Below this is a filter bar showing 'Currently viewing ALL SITES' and 'Customer Complaint Templates'. A table lists three complaint templates, each with a 'Record New' button highlighted with a red box.

	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 10:06:34	New Check	Steve Jones	0 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	3 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	21 Recorded	Record New

At the bottom, there is a pagination bar showing '25 50 100' and navigation links: '<< first', '< previous', 'next >', and 'last >>'.

Step 3: Select the customer if you have a subscription to the customer Customer Manager tool. If not then on **Product Site** select the site the complaint relates too. Then on **Find Product** add the product that the complaint is about.

Customer Complaint Manager Complaints Log

← Back

Cancel Save

Customer	Supermarket 2
Product Site	Demo Co (Group)
Find Product	<input type="text" value="prawn"/> <div> 10005678 - Coconut Prawn Mang </div>
Show Unique Id	10009876 - Potato wrap prawns

Complaint details

Demo Foods reference	<input type="text"/>
Date Demo Foods received	<input type="text"/>
Customer REF	<input type="text"/>
Response required	--Please Select-- <input type="text" value="Enter a comment"/>
Product Category	--Please Select--
Factory Code	<input type="text"/>
Finished product name	--Please Select--
Raw material code	<input type="text"/>
Product	--Please Select--
Category	--Please Select--
Trace code	<input type="text"/>
Complaint Type	--Please Select--

Complaint Category	--Please Select--
Complaint Detail	<input type="text"/>
Images/Evidence	<div> <input type="button" value="Choose file"/> No file chosen <input type="text" value="Enter image description"/> </div> <div> <input type="button" value="Choose file"/> No file chosen <input type="text" value="Enter image 2 description"/> </div> <div> <input type="button" value="Choose file"/> No file chosen <input type="text" value="Enter image 3 description"/> </div>
Supplier Responsible	--Please Select--
Business Unit	--Please Select--
Upload files	<input type="button" value="Choose file"/> No file chosen <input type="text" value="Enter document description"/>

Cancel Save

Save Progress
Save Progress & Exit
Save & Share

Step 4: Fill in your answers and complete then select **Save** then **Save & Share**. This will then allow you to send the investigation template to a user within the business to complete.

3.1.1 HOW TO SHARE WITH A USER FOR INVESTIGATION

Step 1: After you select Save & Share above, Select a **Company User** to share with who will complete the investigation, then select a **Respond By Date**. once done select **Share**

Share Customer Complaint Form

Share With

☒ Company User
 ☐ Email Address

Company User

-- Select --

Response Required By

dd/mm/yyyy

Include Message

Message...

Cancel

Share

Step 2: The **Status** will revert to **Awaiting Response** ready for the user to complete the investigation template

Customer Complaint Manager

Recorded - Complaints Log

Customer Complaint has been successfully shared

Between Dates

Customer

Product

Status

Sent To

Filter

Clear Filters

Delete Selected

Export to PDF

	Date Recorded	Customer	Product	Recorded By	Sent To	Status	
<input type="checkbox"/>	05/05/2020 10:00:45	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Steve Jones	Awaiting Response	

3.1.2 HOW TO RECALL A COMPLAINT

Step 1: Select **View Recorded** on the template of the check you want to recall.

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports ▾ Admin

Currently viewing ALL SITES Customer Complaint Templates Change Site Viewing 2 results | Page 1 of 1

Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By		
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New

Step 2: Select the check you want to recall on the right, then select **Recall Complaint**

Customer Complaint Manager

Recorded - SB Customer Complaints Log

← Back to Customer Complaint Templates

Between Dates:

Customer:

Product:

Status:

Sent To:

[Filter](#) [Clear Filters](#)

Complaint details:

Delete Selected Export to PDF

<input type="checkbox"/>	Date Recorded	Customer	Complaint details	Product	Recorded By	Sent To	Response Required By	Status	
<input type="checkbox"/>	26/06/2020 12:35:04	Supermarket 2		None	Steve Jones	Steve Jones	---	Aw...	View Complaint
<input type="checkbox"/>	01/04/2020 10:35:13	Supermarket 2	Quality	111112 - Tesco all day breakfast	Steve Jones	---	---		Edit Details
<input type="checkbox"/>	01/04/2020 10:17:35	Supermarket 2	Quality	1111 - Scrambled egg	Steve Jones	Eric Knowles	---		Send PDF Report
<input type="checkbox"/>	01/04/2020 10:03:08	Supermarket 1	Quality	10005678 - Coconut Prawn Mang	Steve Jones	Eric Knowles	---	Re...	Share
									Recall Complaint
									Request More Info
									Close Complaint

Viewing 4 results | Page 1 of 1

25 50 100 | << first last >>

Step 3: Add a recall comment to notify the user, then select **Save**

Add Note/Comment

Enter note/comment... (optional)

[Cancel](#) [Save](#)

Step 4: The check is now recalled, and the status reverts to **In Progress**

Customer Complaint Manager

Recorded - SB Customer Complaints Log

[← Back to Customer Complaint Templates](#)

Between Dates:

Customer:

Product:

Status:

Sent To:

Complaint details:

[Filter](#) [Clear Filters](#)

[Delete Selected](#) [Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Complaint details	Product	Recorded By	Sent To	Response Required By	Status	
<input type="checkbox"/>	26/06/2020 12:35:04	Supermarket 2		None	Steve Jones	---	---	In Progress	
<input type="checkbox"/>	01/04/2020 10:35:13	Supermarket 2	Quality	111112 - Tesco all day breakfast	Steve Jones	---	---	In Progress	
<input type="checkbox"/>	01/04/2020 10:17:35	Supermarket 2	Quality	1111 - Scrambled egg	Steve Jones	Eric Knowles	---	Closed	
<input type="checkbox"/>	01/04/2020 10:03:08	Supermarket 1	Quality	10005678 - Coconut Prawn Mang	Steve Jones	Eric Knowles	---	Requires Your Action	

3.1.3 HOW TO SEND A PDF REPORT OF A CUSTOMER COMPLAINT

Step 1: On the Complaints Manager, select view recorded of the check you want to send the PDF report of.

Customer Complaint Manager

[Complaint Templates](#) [← Received Customer Complaints](#) [Activity Overview](#) [Reports](#) [Admin](#)

Currently viewing [ALL SITES](#) Customer Complaint Templates [Change Site](#) Viewing 2 results | Page 1 of 1

[Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By		
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	Click to view recorded 4 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New

Step 2: Now select the check you want to send the report of then select **Send PDF Report**

Customer Complaint Manager

Recorded - SB Customer Complaints Log

[← Back to Customer Complaint Templates](#)

Between Dates:

Customer:

Product:

Status:

Sent To:

Complaint details:

[Filter](#) [Clear Filters](#)

[Delete Selected](#) [Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Complaint details	Product	Recorded By	Sent To	Response Required By	Status	
<input type="checkbox"/>	26/06/2020 12:35:04	Supermarket 2		None	Steve Jones	---	---	In	
<input type="checkbox"/>	01/04/2020 10:35:13	Supermarket 2	Quality	111112 - Tesco all day breakfast	Steve Jones	---	---	In	
<input type="checkbox"/>	01/04/2020 10:17:35	Supermarket 2	Quality	1111 - Scrambled egg	Steve Jones	Eric Knowles	---		

View Complaint
Edit Details
Send PDF Report
Share

Step 3: Add an email address, any notes. Once done select **Send**

Send PDF Report

Email Address

user@democo.com

Comments/Notes

Add notes here

Copy

☒ Send copy to me

Cancel

Send

3.2 HOW TO RESPOND TO A CUSTOMER COMPLAINT ASSIGNED TO YOU

3.2.1 HOW TO VIEW THE COMPLAINT DETAILS

Step 1: The user who has to complete the investigation will get an email notification and a notification in their task manager like this. Select this task

News & Statistics

Supplier Approval

Quality Management

Trading & Planning

More

Steve

Home | Customer Complaints (Looker) | More

Latest News

It would require a 'monumental shift' for sustainability to top the corporate agenda
Significant commitments on issues like food waste or plastic pollution would suggest that sustainability is moving up the corporate priority list. However, with consumer sentiment sliding and upward pricing pressure on the horizon, it would require a 'monumental shift' for sustainability to continue its ascent in the boardroom.

Experts weigh in on digestive health in Kerry Health and Nutrition Institute webinar
Gut health is becoming increasingly popular among consumers. In this wide-ranging health area, the gut-brain axis (GBA) is a key area of interest, along with the sort of probiotic bacteria that aid wider gut health. Dairy & Food Culture Technologies Consultant, Dr. Mary Ellen Sanders, tells NutritionInsight.

The Beyond Burger finally goes on sale in Tesco
US-based alternative protein business Beyond Meat has revealed its Beyond Burger is now available to purchase at UK retailer Tesco, following a lengthy delay.

My Tasks 89 outstanding

Steve Jones sent you a customer complaint form to complete

Elaine Rogers responded to a questionnaire

Elaine Rogers responded to a questionnaire

Elaine Rogers responded to a questionnaire

Kevin Smyth responded to a supplier check

View All Tasks

Or they can go to **Received Customer Complaints** in the **Customer Complaints Manager** and see that a complaint requires their action

Step 2: Select View to review & close when done

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Between Dates Company Sent To Status [Filter](#) [Clear Filters](#)

Viewing 23 results | Page 1 of 1

Date	Company	Title	Sent By	Sent To	Status	
05/05/2020 10:00:45	Supermarket 2	Complaints Log	Steve Jones	Steve Jones	Requires Your Action	Respond View

Step 3: The complaint details will now show. Close when done.



Demo Co

100 Patrick Street
Derry
BT48 7EL
United Kingdom

Supermarket 2

Falcon Way
Shire Park
Welwyn Garden City
London
Hertfordshire
AL7 1TW
United Kingdom
Date: 05/05/2020

Title	Complaints Log
Customer	Supermarket 2
Product	10009876 - Potato wrap prawns
Date Recorded	05/05/2020 10:00:45
Recorded By	Steve Jones

Complaint details

Demo Foods reference	123456
Date Demo Foods received	05/05/2020
Customer REF	54321
Response required	Yes
Product Category	Frozen
Factory Code	EC010101
Finished product name	10009876 - Potato wrap prawns
Raw material code	ASFPWP002
Product	10009876 - Potato wrap prawns
Trace code	UB: 17 Dec 2016, LF341 09:16 093
Complaint Type	FB-Hair
Complaint Category	Foreign Body

3.2.2 HOW TO COMPLETE THE INVESTIGATION TEMPLATE

Completing the investigation is down to the user who is responsible for that area

Step 1: The user who has to complete the investigation will get an email notification and a notification in their task manager like this

The screenshot shows a user interface with a top navigation bar containing links like 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'Steve'. Below this is a breadcrumb trail: 'Home | Customer Complaints (Looker) | More'. The main content area is divided into two sections. On the left, 'Latest News' features three articles with images and headlines. On the right, a 'My Tasks' sidebar shows '89 outstanding' tasks. The first task, 'Steve Jones sent you a customer complaint form to complete', is highlighted with a red box. Other tasks listed include 'Elaine Rogers responded to a questionnaire' and 'Kevin Smyth responded to a supplier check'.

Or they can go to **Received Customer Complaints** in the **Customer Complaints Manager** and see that a complaint requires their action

The screenshot shows the 'Customer Complaint Manager' interface. It has a top navigation bar with 'Complaint Templates', 'Received Customer Complaints', 'Activity Overview', 'Reports', and 'Admin'. Below this is a filter section with 'Between Dates', 'Company', 'Sent To', and 'Status' dropdowns, and 'Filter' and 'Clear Filters' buttons. The main content is a table with the following data:

Date	Company	Title	Sent By	Sent To	Status		
05/05/2020 10:00:45	Supermarket 2	Complaints Log	Steve Jones	Steve Jones	Requires Your Action	Respond	View

At the bottom right of the table, it says 'Viewing 23 results | Page 1 of 1'.

Step 2: Then select **Respond**

This screenshot is identical to the previous one, showing the 'Customer Complaint Manager' interface. The 'Respond' button in the first row of the table is highlighted with a red box.

Step 3: Fill in details then select **Save & Save Progress**

Customer Complaint Manager Complaints Log ← Back

Cancel Save

Investigation details

Demo REF

Investigation start date

Investigation end date

Comments & Investigation details

Evidence

No file chosen

No file chosen

No file chosen

Files No file chosen

Root cause of issue

Preventative action taken

Cancel Save

Save Progress
Save Progress & Exit
Save & Send Response

FOODS Quick Links Support

Step 4: The status stays at *Requires Your Attention* as it needs to be sent

Customer Complaint Manager

Complaint Templates **← Received Customer Complaints** Activity Overview Reports Admin

Between Dates Company Sent To Status Filter Clear Filters

Viewing 28 results | Page 1 of 1

Date	Company	Title	Sent By	Sent To	Response Required By	Status		
24/08/2020 13:41:18	Supermarket 2	SB Customer Complaints Log	Steve Jones	Steve Jones	24/08/2020	Requires Your Action	→ Respond	View
23/07/2020 10:24:25	Supermarket 2	Complaints Log	Steve Jones	Steve Jones	---	Requires Your Action	→ Respond	View

3.2.3 HOW TO SAVE A DRAFT TO COMPLETE LATER

Step 1: The user who has to complete the investigation will get an email notification and a notification in their task manager like this

News & Statistics ▾

Supplier Approval ▾

Quality Management ▾

Trading & Planning ▾

More ▾


Steve ▾

Home | Customer Complaints (Looker) | More ▾


Latest News

« Previous


Next »



It would require a 'monumental shift' for sustainability to top the corporate agenda
Significant commitments on issues like food waste or plastic pollution would suggest that sustainability is moving up the corporate priority list. However, with consumer sentiment sliding and upward pricing pressure on the horizon, it would require a "monumental shift" for sustainability to continue its ascent in the boardroom.



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The Beyond Burger finally goes on sale in Tesco
US-based alternative protein business Beyond Meat has revealed its Beyond Burger is now available to purchase at UK retailer Tesco, following a lengthy delay.

My Tasks 89 outstanding

Steve Jones sent you a customer complaint form to complete

Elaine Rogers responded to a questionnaire

Elaine Rogers responded to a questionnaire

Elaine Rogers responded to a questionnaire

Kevin Smyth responded to a supplier check

View All Tasks

Or they can go to **Received Customer Complaints** in the **Customer Complaints Manager** and see that a complaint requires their action

Customer Complaint Manager

Complaint Templates

← Received Customer Complaints

Activity Overview

Reports ▾

Admin

Between Dates

Company

Sent To

Status

Filter

Clear Filters

Viewing 23 results | Page 1 of 1

Date	Company	Title	Sent By	Sent To	Status		
05/05/2020 10:00:45	Supermarket 2	Complaints Log	Steve Jones	Steve Jones	Requires Your Action	→ Respond	View

Step 2: Then select **Respond**

Customer Complaint Manager

Complaint Templates

← Received Customer Complaints

Activity Overview

Reports ▾

Admin

Between Dates

Company

Sent To

Status

Filter

Clear Filters

Viewing 23 results | Page 1 of 1

Date	Company	Title	Sent By	Sent To	Status		
05/05/2020 10:00:45	Supermarket 2	Complaints Log	Steve Jones	Steve Jones	Requires Your Action	→ Respond	View

Step 3: Fill in details then select **Save & Save Progress & Exit**

Customer Complaint Manager Complaints Log ← Back

Cancel Save

Investigation details

Demo REF

Investigation start date

Investigation end date

Comments & Investigation details

Evidence

Choose file No file chosen

Choose file No file chosen

Choose file No file chosen

Files Choose file No file chosen

Root cause of issue

Preventative action taken

Cancel Save

Save Progress
Save Progress & Exit
Save & Send Response

FOODS Quick Links Support

Step 4: The status stays at *Requires Your Attention* as it needs to be sent

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports Admin

Between Dates Company Sent To Status Filter Clear Filters

Viewing 28 results | Page 1 of 1

Date	Company	Title	Sent By	Sent To	Response Required By	Status		
24/08/2020 13:41:18	Supermarket 2	SB Customer Complaints Log	Steve Jones	Steve Jones	24/08/2020	Requires Your Action	→ Respond	View
23/07/2020 10:24:25	Supermarket 2	Complaints Log	Steve Jones	Steve Jones	---	Requires Your Action	→ Respond	View

3.2.4 HOW TO SEND A COMPLETED INVESTIGATION BACK FOR APPROVAL

Step 1: Go to **Received Customer Complaints** in the **Customer Complaints Manager** and you can see that a complaint requires your attention. Select **Respond**

Customer Complaint Manager

Complaint Templates ← **Received Customer Complaints** Activity Overview Reports Admin

Between Dates: [Calendar Icon] [Calendar Icon] Company: All Sent To: All Status: All [Filter] [Clear Filters]

Viewing 23 results | Page 1 of 1

Date	Company	Title	Sent By	Sent To	Status		
05/05/2020 10:00:45	Supermarket 2	Complaints Log	Steve Jones	Steve Jones	Requires Your Action	Respond	View

Step 2: Fill in details then select **Save & Save & Send Response**

Customer Complaint Manager Complaints Log [Back]

[Cancel] [Save]

Investigation details

Demo REF: [Ref]

Investigation start date: 04/05/2020 [Calendar Icon]

Investigation end date: 05/05/2020 [Calendar Icon]

Comments & Investigation details: [Enter comments here]

Evidence:

[Choose file] No file chosen [Enter image description]

[Choose file] No file chosen [Enter image 2 description]

[Choose file] No file chosen [Enter image 3 description]

Files: [Choose file] No file chosen [Enter document description]

Root cause of issue: [Root cause here]

Preventative action taken: [Preventative action here]

[Cancel] [Save]

Save Progress
Save Progress & Exit
Save & Send Response

Step 3: The status now reverts to **Awaiting Response**

14/05/2020 07:36:28	Supermarket 6	Complaints Log	Steve Jones	Eugene Delacroix	---	Awaiting Response	Respond	View
---------------------	---------------	----------------	-------------	------------------	-----	-------------------	---------	------

3.3 HOW TO APPROVE A COMPLAINT INVESTIGATION

3.3.1 HOW TO REQUEST MORE INFORMATION ON AN INVESTIGATION

Step 1: To Request More Info if you are not happy you can do this at Step 3 in 5.1. Simply select **Request More Info**

Customer Complaint Manager

Recorded - Complaints Log [← Back to Customer Complaint Templates](#)

Customer Complaint has been successfully shared

Between Dates: Customer: Product: Status: Sent To: [Filter](#) [Clear Filters](#)

[Delete Selected](#) [Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Product	Recorded By	Sent To	Status	
<input type="checkbox"/>	05/05/2020 10:41:08	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Lauren Bush	Requires Your Action	
<input type="checkbox"/>	05/05/2020 10:00:45	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Steve Jones	Closed	
<input type="checkbox"/>	11/03/2020 11:10:52	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	---	In Progress	
<input type="checkbox"/>	10/10/2019 13:00:09	Supermarket 1	10009876 - Potato wrap prawns	Steve Jones	Eric Knowles	Awaiting Response	
<input type="checkbox"/>	15/04/2019 16:05:16	Supermarket 4	1000245 - Aromatic Crispy Duck	Steve Jones	Lauren Bush	Closed	<ul style="list-style-type: none"> View Complaint Edit Details Send PDF Report Share Recall Complaint Request More Info Close Complaint
<input type="checkbox"/>	15/04/2019 16:03:01	Supermarket 4	1000457 - Dim Sum selection	Steve Jones	Lauren Bush	Awaiting Response	

Step 2: Add a note then select **Save**

Add Note/Comment ×

Request more info

[Cancel](#) [Save](#)

Step 3: Once sent to the user the status will change to **Awaiting Response** again and will follow the steps above

3.3.2 HOW TO CONFIRM & CLOSE A COMPLAINT

Once you have finished the steps above and are happy with the responses, your next steps are now to confirm and close the complaint

Step 1: After the above the status changes to *Requires Your Action*.

Customer Complaint Manager

Recorded - Complaints Log [← Back to Customer Complaint Templates](#)

Customer Complaint has been successfully shared

Between Dates: Customer: Product: Status: Sent To: [Filter](#) [Clear Filters](#)

[Delete Selected](#) [Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Product	Recorded By	Sent To	Status	
<input type="checkbox"/>	05/05/2020 10:41:08	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Lauren Bush	Requires Your Action	
<input type="checkbox"/>	05/05/2020 10:00:45	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Steve Jones	Closed	
<input type="checkbox"/>	11/03/2020 11:10:52	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	---	In Progress	
<input type="checkbox"/>	10/10/2019 13:00:09	Supermarket 1	10009876 - Potato wrap prawns	Steve Jones	Eric Knowles	Awaiting Response	
<input type="checkbox"/>	15/04/2019 16:05:16	Supermarket 4	1000245 - Aromatic Crispy Duck	Steve Jones	Lauren Bush	Closed	

Step 2: Click on the check to open the options and select *Close Complaint*

Customer Complaint Manager

Recorded - Complaints Log [← Back to Customer Complaint Templates](#)

Customer Complaint has been successfully shared

Between Dates: Customer: Product: Status: Sent To: [Filter](#) [Clear Filters](#)

[Delete Selected](#) [Export to PDF](#)

<input type="checkbox"/>	Date Recorded	Customer	Product	Recorded By	Sent To	Status	
<input type="checkbox"/>	05/05/2020 10:41:08	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Lauren Bush	Requires Your Action	
<input type="checkbox"/>	05/05/2020 10:00:45	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Steve Jones	Closed	
<input type="checkbox"/>	11/03/2020 11:10:52	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	---	In Progress	
<input type="checkbox"/>	10/10/2019 13:00:09	Supermarket 1	10009876 - Potato wrap prawns	Steve Jones	Eric Knowles	Awaiting Response	
<input type="checkbox"/>	15/04/2019 16:05:16	Supermarket 4	1000245 - Aromatic Crispy Duck	Steve Jones	Lauren Bush	Closed	
<input type="checkbox"/>	15/04/2019 16:03:01	Supermarket 4	1000457 - Dim Sum selection	Steve Jones	Lauren Bush	Awaiting Response	

[View Complaint](#)
[Edit Details](#)
[Send PDF Report](#)
[Share](#)
[Recall Complaint](#)
[Request More Info](#)
[Close Complaint](#)

Step 3: This will then open the Confirmation template if you are using it. Answer the questions, then select *Save & Save & Confirm*

Customer Complaint Manager Complaints Log

← Back

Cancel Save

Confirmations

Has the issue been investigated?

Yes

Enter a comment

Was the root cause discovered?

Yes

Enter a comment

Has action been taken to prevent?

Yes

Enter a comment

Are you happy with the result?

Yes

Enter a comment

Response time in days

Has the customer been notified?

Yes

Enter a comment

What date were they notified?

05/05/2020



Cancel Save

Save Progress
Save Progress & Exit
Save & Confirm

FOODS

Quick Links

Support

Step 4: That is the check complete and the **Status** reverts to **Closed**

Customer Complaint Manager

Recorded - Complaints Log

← Back to Customer Complaint Templates

Between Dates



Customer

All

Product

All

Status

All

Sent To

All

Filter

Clear Filters

Delete Selected

Export to PDF

<input type="checkbox"/>	Date Recorded	Customer	Product	Recorded By	Sent To	Status	
<input type="checkbox"/>	05/05/2020 10:41:08	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Lauren Bush	Closed	
<input type="checkbox"/>	05/05/2020 10:00:45	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	Steve Jones	Closed	
<input type="checkbox"/>	11/03/2020 11:10:52	Supermarket 2	10009876 - Potato wrap prawns	Steve Jones	---	In Progress	
<input type="checkbox"/>	10/10/2019 13:00:09	Supermarket 1	10009876 - Potato wrap prawns	Steve Jones	Eric Knowles	Awaiting Response	
<input type="checkbox"/>	15/04/2019 16:05:16	Supermarket 4	1000245 - Aromatic Crispy Duck	Steve Jones	Lauren Bush	Closed	

3.4 HOW TO IMPORT COMPLAINTS INTO FOODS CONNECTED IN BULK

If you have a large volume of complaints to record on Foods Connected, instead of recording each complaint individually you can download a template to fill in and import the data in bulk into the system.

Step 1: From the **Complaint Templates** section of the Customer Complaint Manager, click on the menu button beside your template and select **Generate Import Template**.

The screenshot shows the 'Customer Complaint Manager' interface. At the top, there are navigation tabs: News & Statistics, Supplier Approval, Quality Management, Trading & Planning, and More. Below these is the 'Customer Complaint Manager' header. Underneath, there are sub-tabs: Complaint Templates (selected), Received Customer Complaints, Activity Overview, Reports, and Admin. A filter dropdown shows 'Foods Connected (Group)' and the page is 'Page 1 of 1'. There are buttons for 'Add New', 'Duplicate Selected', and 'Delete Selected'. A table lists templates with columns: Last Modified, Title, Created By, and Recorded. One template is listed: 'Customer Complaint Template' by 'Bethany McDowell', recorded '0 Recorded'. A menu button next to the template is open, showing options: View Recorded, Analyse Recorded, Completed Snapshot Report, Edit Details, Edit Complaint Template, Edit Investigation Template, Edit Confirmation Template, Preview, **Generate Import Template** (highlighted with a red box), Import, and View Edit History. The 'FOODS CONNECTED' logo is at the bottom left.

This will download a excel spreadsheet with a column for every field in your template (excluding file and image fields). Fields that are mandatory for the template will have a grey column, for example in this case columns A-C are required fields. Each line of the spreadsheet will import as a separate complaint.

The screenshot shows an Excel spreadsheet template. The ribbon at the top includes File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, and Help. The active cell is J7. The spreadsheet has columns A through E. Column A is 'Customer', B is 'Product', and C is 'Product Site'. These columns are shaded grey, indicating they are mandatory fields. Column D is 'Complaint Details - Issue Type' and Column E is 'Complaint Details - Issue Details'. The first row (row 1) contains the headers for these columns. Rows 2 through 7 are empty for data entry.

	A	B	C	D	E
1	Customer	Product	Product Site	Complaint Details - Issue Type	Complaint Details - Issue Details
2					
3					
4					
5					
6					
7					

Step 2: Once you have filled data into your excel spreadsheet return to the **Complaint Templates** section of the Customer Complaint Manager, click on the menu button beside your template and select **Import**.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports ▾ Admin

Foods Connected (Group) ▾ Viewing 4 results | Page 1 of 1

[Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded
<input type="checkbox"/>	19/10/2021 14:16:58	Customer Complaint Template	Bethany McDowell	0 Recorded

25 50 100

FOODS CONNECTED

- View Recorded
- Analyse Recorded
- Completed Snapshot Report
- Edit Details
- Edit Complaint Template
- Edit Investigation Template
- Edit Confirmation Template
- Preview
- Generate Import Template
- Import**
- View Edit History

Step 3: A page will load with an option to choose a file, click on **Choose File** and upload your completed template. Then click on **Import Forms**, you will have the opportunity to validate your data before it is imported into the system.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾

Customer Complaint Manager - Import Form

Import File 1 [Choose file](#) Custome...plate.xlsx

2 [Import Forms](#)

Step 4: A page will load displaying a count of how many valid and invalid forms have been imported and the table below show red symbols to identify where data is invalid for the template. The forms with invalid data will show at the top and you can use the search box if required.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾

Customer Complaint Manager - Import Form

[Back](#)

Valid Form Count: 1 Invalid Form Count: 2 [Import Valid Forms](#)

[Search...](#)

	Product Site	Product	Customer	Form Data	
⚠	Foods Connected (Group) ✓	FC10178 !	Demo Customer ✓	Complaint Details - Issue Type has an invalid value: Plastic !	Edit
⚠	Foods Connected (Group) ✓	B1234 ✓	Demo Customer ✓	Complaint Details - Issue Type has an invalid value: Too much fat !	Edit
✓	Foods Connected (Group) ✓	001397-0 ✓	Demo Customer ✓	All form values are valid ✓	Edit

Reasons for invalid data:

- Product Site > the product site input into the spreadsheet does not match any of the sites set up for your company.
- Product > the product input into the spreadsheet does not match any of the products in your product file.

- Customer > the customer input into the spreadsheet does not match any of the customers set up in the Customer Manager (the same format of the name is required to match).
- Form Data > this will list any data that does not match the field setup, for example, the input option doesn't match one of the dropdown/checkbox options or text has been input for a numeric field.

Step 5: To correct the invalid data, click on the **Edit** button beside each form and this will open up the complaint for you to make the correction. Then when you have saved and completed it will update the validity.

Customer Complaint Manager - Import

Import Form

Customer: Demo Customer

Product Site: Foods Connected (Group)

Find Product: B1234

Start typing to search your [product file](#) for the product by Product Name or Code.

Cancel Save

Save Progress

Save & Exit

Complaint Details

Issue Type: Too Fatty

Issue Details: The steak was too fatty

Customer Complaint Manager - Import Form

Valid Form Count: 2 Invalid Form Count: 1 Import Valid Forms

Search...

	Product Site	Product	Customer	Form Data	
▲	Foods Connected (Group) ✓	FC10178 !	Demo Customer ✓	Complaint Details - Issue Type has an invalid value: Plastic !	Edit
✓	Foods Connected (Group) ✓	001397-0 ✓	Demo Customer ✓	All form values are valid ✓	Edit
✓	Foods Connected (Group) ✓	B1234 ✓	Demo Customer ✓	All form values are valid ✓	Edit

Step 6: To import the valid data, click on **Import Valid Forms** and the complaints will be imported in against the template. Actions for these complaints can be completed in the same way as complaints recorded individually without the import.

Customer Complaint Manager - Import Form

Valid Form Count: 3 Invalid Form Count: 0 Import Valid Forms

Search...

	Product Site	Product	Customer	Form Data	
✓	Foods Connected (Group) ✓	001397-0 ✓	Demo Customer ✓	All form values are valid ✓	Edit
✓	Foods Connected (Group) ✓	FC1017 ✓	Demo Customer ✓	All form values are valid ✓	Edit
✓	Foods Connected (Group) ✓	B1234 ✓	Demo Customer ✓	All form values are valid ✓	Edit

Customer Complaint Manager

Recorded - Customer Complaint Template

Between Dates: [] [] Site: All Customer: All Product: All Status: All Sent To: All Filter Clear Filters

Delete Selected Export to PDF Export to Excel

	Date Recorded	Site	Customer	Product	Recorded By	Sent To	Response Required By	Status	
<input type="checkbox"/>	19/10/2021 14:26:06	Foods Connected	Demo Customer	B1234 - Ribeye Steak	Bethany McDowell	---	---	In Progress	View
<input type="checkbox"/>	19/10/2021 14:26:06	Foods Connected	Demo Customer	FC1017 - 85VL	Bethany McDowell	---	---	In Progress	View
<input type="checkbox"/>	19/10/2021 14:26:06	Foods Connected	Demo Customer	001397-0 - Beef Burgers x2	Bethany McDowell	---	---	In Progress	View

*In cases where you do have invalid data in your forms, you can use the **Import Valid Forms** button to import the forms that are all correct. Then if you want to return later to fix the invalid options these will remain on the **Import** page (step 2) until they are all corrected and imported.

Customer Complaint Manager - Import Form

[← Back](#)
[New Import](#)

Imported File Name	Uploaded On		
Customer_Complaint_Template.xlsx	19/10/2021 14:29:17	Edit	Delete

HOW TO ACCESS THE ACTIVITY OVERVIEW FOR CUSTOMER COMPLAINTS

Step 1: In the customer complaints manager tool, select **Activity Overview**

Customer Complaint Manager

[Complaint Templates](#) [← Received Customer Complaints](#) **[Activity Overview](#)** [Reports](#) [Admin](#)

Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#)

Viewing 2 results | Page 1 of 1

[Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New	List
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	30 Recorded	Record New	List

25 50 100 | << first < previous next > last >>

Step 2: Your activity view will show like this below

Customer Complaint Manager

[Complaint Templates](#) [← Received Customer Complaints](#) **[Activity Overview](#)** [Reports](#) [Admin](#)

Between Dates:
 User: All
 Action: All
 [Filter](#)
[Clear Filters](#)

Viewing 162 results | Page 1 of 4

Date	User	Title	Action	
24/08/2020 14:41:19	Steve Jones	SB Customer Complaints Log	Shared customer complaint form with Steve Jones	List
21/08/2020 14:54:10	Steve Jones	SB Customer Complaints Log	Recalled the Customer Complaint form (Comment)	List
21/08/2020 14:50:17	Steve Jones	SB Customer Complaints Log	Deleted Customer Complaint Template	List
21/08/2020 14:44:18	Steve Jones	SB Customer Complaints Log	Recorded Customer Complaint	List
21/08/2020 14:43:45	Steve Jones	SB Customer Complaints Log - Copy	Deleted Customer Complaint Template	List
21/08/2020 14:33:53	Steve Jones	SB Customer Complaints Log	Created Customer Complaint Template	List
12/08/2020 12:41:34	Steve Jones	SB Customer Complaints Log	Deleted Customer Complaint Template	List
	Steve Jones	SB Customer Complaints Log	Recorded Customer Complaint	List
	Steve Jones	Complaints Log	Recorded Customer Complaint	List

3.5 HOW TO SEARCH FOR SPECIFIC ACTIVITY

Step 1: To search for specific activity use the filters at the top of the page. Select the **dates, users & actions**. Once done select **Filter**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints **Activity Overview** Reports ▾ Admin

Between Dates: 01/08/2020 24/08/2020 User: Steve Jones Action: Recorded **Filter** Clear Filters

Date	User	Title	Action
There are no records that match your filter criteria...			

25 50 100 | << first < previous next > last >>

Step 2: The table will show that criteria

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints **Activity Overview** Reports ▾ Admin

Between Dates: 01/08/2020 24/08/2020 User: Steve Jones Action: Recorded **Filter** Clear Filters

Viewing 5 results | Page 1 of 1

Date	User	Title	Action	
21/08/2020 14:44:18	Steve Jones	SB Customer Complaints Log	Recorded Customer Complaint	
12/08/2020 12:41:22	Steve Jones	SB Customer Complaints Log	Recorded Customer Complaint	
12/08/2020 08:42:49	Steve Jones	Complaints Log	Recorded Customer Complaint	
11/08/2020 14:27:56	Steve Jones	Complaints Log	Recorded Customer Complaint	
10/08/2020 15:54:45	Steve Jones	Complaints Log	Recorded Customer Complaint	

Step 3: Select the Eye Icon to view the complaint. Close when done

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints **Activity Overview** Reports ▾ Admin

Between Dates: 01/08/2020 24/08/2020 User: Steve Jones Action: Recorded **Filter** Clear Filters

Viewing 5 results | Page 1 of 1

Date	User	Title	Action	
21/08/2020 14:44:18	Steve Jones	SB Customer Complaints Log	Recorded Customer Complaint	View Complaint

Step 4: **Clear filters** when done to reset the activity back to normal view.

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints **Activity Overview** Reports ▾ Admin

Between Dates

01/08/2020



24/08/2020



User

Steve Jones ▾

Action

Recorded ▾

Filter

Clear Filters

Viewing 5 results | Page 1 of 1

Date	User	Title	Action	
21/08/2020 14:44:18	Steve Jones	SB Customer Complaints Log	Recorded Customer Complaint	
12/08/2020 12:41:22	Steve Jones	SB Customer Complaints Log	Recorded Customer Complaint	
12/08/2020 08:42:49	Steve Jones	Complaints Log	Recorded Customer Complaint	
11/08/2020 14:27:56	Steve Jones	Complaints Log	Recorded Customer Complaint	
10/08/2020 15:54:45	Steve Jones	Complaints Log	Recorded Customer Complaint	

4. REPORTING

4.1 HOW TO ANALYSE RECORDED CUSTOMER COMPLAINTS

Step 1: In the Customer Complaints Manager, select the complaint template that you want to analyse, then select **Analyse Recorded**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints **Activity Overview** Reports ▾ Admin

Currently viewing

ALL SITES

Customer Complaint Templates

Change Site

Viewing 2 results | Page 1 of 1

Add New

Duplicate Selected

Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	27 Recorded	

View Recorded

Analyse Recorded

Completed Snapshot Report

25 50 100

Step 2: Then choose the customer or customers you want to analyse, by ticking. Then select **Next** when done

Customer Complaint Manager

Complaint Analysis - Complaints Log

← Back to Complaint Templates

Search Customers...

<input type="checkbox"/>	Customer Name
<input checked="" type="checkbox"/>	Supermarket 1
<input type="checkbox"/>	Supermarket 2
<input type="checkbox"/>	Supermarket 4
<input type="checkbox"/>	Supermarket 6

Next >

Step 3: Then choose the product. You can use the filters provided to help you narrow the search if there's hundreds of products. Select **Next** when done

Customer Complaint Manager

Complaint Analysis - Complaints Log

[← Back to Complaint Templates](#)

Groups or Products

Individual Products

Product Type AllProduct Groups All[Filter Products](#)☐ Product☐ 10005678 - Coconut Prawn Mang☒ 10009876 - Potato wrap prawns

< Previous

[Next >](#)**Step 4:** Choose the date range, the fields that you want to analyse & what type of chart.

Customer Complaint Manager

Complaint Analysis - Complaints Log

[← Back to Complaint Templates](#)

Date Range:

09/04/2019

24/08/2020

Fields:

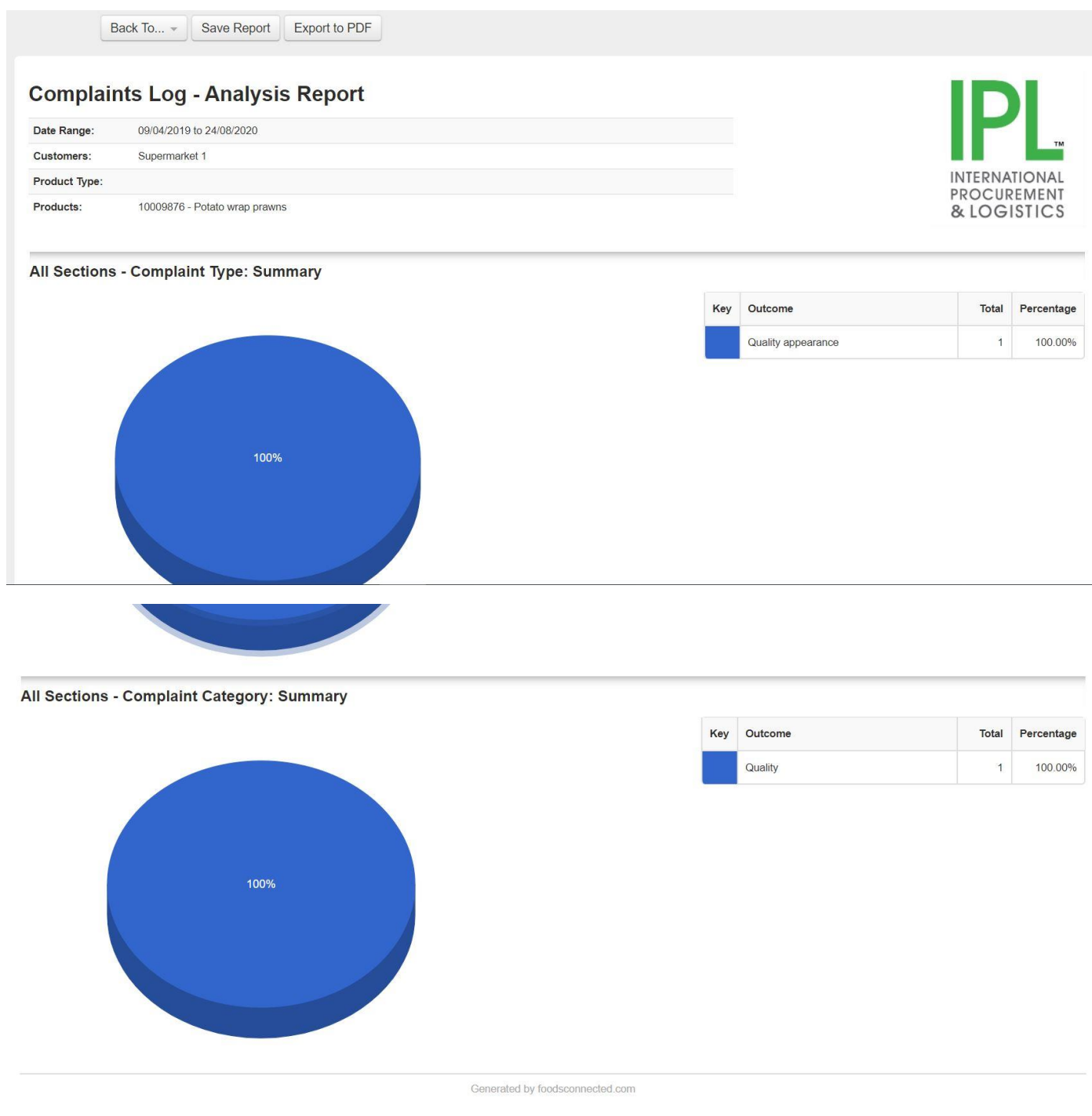


<input type="checkbox"/>	Section	Field	Chart Style
<input checked="" type="checkbox"/>	All Sections	Complaint Type: Summary	Pie Chart
<input checked="" type="checkbox"/>	All Sections	Complaint Category: Summary	Pie Chart
<input type="checkbox"/>	Complaint details	Product Category: Summary	Pie Chart

Step 5: Select **Generate Report** when done

< Previous

[Generate Report](#)**Step 6:** The report displays like this below. You can **Save** the report & **Export to PDF** if you like. Select **Back** to when done.



4.2 HOW TO CREATE A COMPLETED SNAPSHOT REPORT ON CUSTOMER COMPLAINTS

Step 1: Select the customer complaints template you want to do a report on, then select **Completed Snapshot Report**

Customer Complaint Manager

[Complaint Templates](#)
[Received Customer Complaints](#)
[Activity Overview](#)
[Reports](#)
[Admin](#)

Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#) Viewing 2 results | Page 1 of 1

[Add New](#)
[Duplicate Selected](#)
[Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	27 Recorded	Record New

25 50 100 |
 [View Recorded](#)
[Analyse Recorded](#)
[Completed Snapshot Report](#)
[Edit Details](#)

Step 2: Select all current suppliers for the report

Customer Complaint Manager

Customer Complaint Snapshot - Complaints Log

[Back to Templates](#)
[Next >](#)

Supplier Options

☒ All Current Suppliers whenever report is run
 ☐ Filtered Supplier selection from current list

[Next >](#)

Or filter your suppliers & choose. The select **Next** when done

Customer Complaint Snapshot - Complaints Log

[Back to Templates](#)
[Next >](#)

Supplier Options

☐ All Current Suppliers whenever report is run
 ☒ Filtered Supplier selection from current list

Search your Suppliers...

<input type="checkbox"/>	Supplier Name	2 Selected
<input checked="" type="checkbox"/>	Supermarket 1	
<input checked="" type="checkbox"/>	Supermarket 2	
<input type="checkbox"/>	Supermarket 4	
<input type="checkbox"/>	Supermarket 6	

[Next >](#)

Step 3: Then select all current products

Customer Complaint Manager

Customer Complaint Snapshot - Retail Pack Assessment (Dr, Ns, Calc)

[Back to Templates](#)
[Previous](#)
[Next...](#)

Product/Group Options

☒ All Current Products whenever report is run
 ☐ Filtered Products/Groups selection from current list

[Previous](#)
[Next...](#)

Or filter your products & choose. Then select **Next**

Customer Complaint Manager

Customer Complaint Snapshot - Retail Pack Assessment (Dr, Ns, Calc) [← Back to Templates](#) [Previous](#) [Next...](#)

Product/Group Options

☐ All Current Products whenever report is run ☒ Filtered Products/Groups selection from current list

Product Groups ▼

Filter Groups by Product Type Beef ▼

☐ Select Product Groups

☒ 85 VL

☒ Carcass

☐ Trim

[Previous](#) [Next...](#)

Step 4: Now choose the parameters of your report. As you can see there are many to use to create a custom report. Once done select **Next**

Customer Complaint Snapshot - Complaints Log [← Back to Templates](#) [Previous](#) [Next...](#)

Sites ☒ All Available Sites ☐ Specific Sites

Date Filtering ☒ Date Range ☐ From Set Date ☐ During Set Time Period ☐ Current Year to Date ☐ Company Period ☐ Last Period ☐ Current Period

Date Range 01/08/2019 01/08/2020

Report on Field of Type ☐ Numeric ☒ Dropdown ☐ Preset Fields ☐ Overall Count

Dropdown Fields Complaint details - ▼

Charts Type Pie Chart ▼

Legend Percentages ☒ Shown ☐ Hidden

Total/Average per Outcome ☒ Shown ☐ Hidden

Filter By ▼ [Add](#)

↑ Complaint details - Complaint Type ×

Summarize By ----- Timespans ----- ▼ [Add](#)

↑ Annually ×

Report Comments Select Language

Reporting on complaint Categories for the year

Step 5: If you have chosen to filter your report this option will show below, choose which you would like to filter by the select **Generate Report**

Customer Complaint Manager

Customer Complaint Snapshot - Complaints Log [← Back to Templates](#) [Previous](#) [Generate Report](#)

Filter	Options
Complaint details - Complaint Type	<input checked="" type="checkbox"/> FB-Hair <input checked="" type="checkbox"/> Quality appearance

[Previous](#) [Generate Report](#)

Step 6: Your report will show like this below, you can amend several parameters of the report by selecting **Amend Parameters**.

[Back To...](#)
[Amend Parameters](#)
[Save Report](#)
[Export to PDF](#)

Complaints Log - Snapshot Report

Date Range 01/08/2019 to 01/08/2020

Suppliers [Hide](#) All

Products [Hide](#) All


Dropdown Field Complaint details - Complaint Category

Overall Total 5

Average Per Outcome 2.5

Comments Reporting on complaint Categories for the year

Complaint Type: FB-Hair, Quality appearance



01/08/2019 - 31/07/2020 by Complaint details - Complaint Category [Create Dashboard Widget](#)

Key	Outcome	Total	Percentage
	Foreign Body	4	80.00%
	Quality	1	20.00%

Total: 5
Average per Outcome: 2.5

Step 7: To save the report in the Customer complaints manager select **Save Report**

Back To... Amend Parameters **Save Report** Export to PDF

Complaints Log - Snapshot Report

Date Range: 01/08/2019 to 01/08/2020

Suppliers: All

Products: All

Dropdown Field: Complaint details - Complaint Category

Overall Total: 5

Average Per Outcome: 2.5

Comments: Reporting on complaint Categories for the year

Complaint Type: FB-Hair, Quality appearance

01/08/2019 - 31/07/2020 by Complaint details - Complaint Category [Create Dashboard Widget](#)

Key	Outcome	Total	Percentage
	Foreign Body	4	80.00%
	Quality	1	20.00%

Total: 5
Average per Outcome: 2.5

Step 8: Name the report, select the site & the access level. Once done select **Save As**, then **New Report**

Save Report As...

Report Title:

Report Site:

Report Access Level:

4.3 HOW TO VIEW SAVED ANALYSIS & SNAPSHOT REPORTS

Step 1: On the main customer complaints page select **Reports**, then select **Analysis Reports** or **Snapshot Reports**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview **Reports** Admin

Currently viewing **ALL SITES** Customer Complaint Templates Change Site Analysis Reports Snapshot Reports Viewing 2 results | Page 1 of 1

Add New Duplicate Selected Delete Selected

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	27 Recorded	Record New

25 50 100 | << first < previous next > last >>

Step 2: Once there you can see all your saved reports. To view hover over the **Title** or **Report type** and select.

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview **Reports** Admin

Currently viewing **ALL SITES** Customer Complaint Snapshot Reports Change Site Viewing 1 results [View Widgets](#)

Title	Report Type	Site	Template	Access	Date Created	Creator	Last Modified	Modifier	
Snapshot Report	Customer Complaint Snapshot	IPL (Group)	Complaints Log	All Users	25/08/2020	Steve Jones	25/08/2020	Steve Jones	

Step 3: The report then opens

Back To... Amend Parameters Save Report Export to PDF

Complaints Log - Snapshot Report

Date Range 01/08/2019 to 01/08/2020

Suppliers All

Products All

Dropdown Field Complaint details - Complaint Category

Overall Total 5

Average Per Outcome 2.5

Comments Reporting on complaint Categories for the year

Complaint Type: FB-Hair, Quality appearance

01/08/2019 - 31/07/2020 by Complaint details - Complaint Category [Create Dashboard Widget](#)

Key	Outcome	Total	Percentage
	Foreign Body	4	80.00%
	Quality	1	20.00%

Total: 5
Average per Outcome: 2.5

IPL
INTERNATIONAL PROCUREMENT & LOGISTICS

Step 4: You can change the sites you view at the top by selecting change sites

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview **Reports** Admin

Currently viewing **ALL SITES** Customer Complaint Snapshot Reports Change Site Viewing 1 results [View Widgets](#)

Search Reports...


Step 5: And to delete a report simply select the **delete/trash icon**

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview **Reports** Admin

Currently viewing **ALL SITES** Customer Complaint Snapshot Reports Change Site

Viewing 1 results View Widgets


Title	Report Type	Site	Template	Access	Date Created	Creator	Last Modified	Modifier	
Snapshot Report	Customer Complaint Snapshot	IPL (Group)	Complaints Log	All Users	25/08/2020	Steve Jones	25/08/2020	Steve Jones	

5. USER ACCESS

User access is granted by the admin of the system. So if you need access please request it. If you are an admin you can grant access to other users. You do this in the settings page. This is how you do it below.

5.1 GRANT A NEW USER ACCESS

Step 1: Select the **Settings** Icon



News & Statistics Supplier Approval Quality Management Trading & Planning More Steve 

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview **Reports** Admin

Currently viewing **ALL SITES** Customer Complaint Templates Change Site Viewing 2 results | Page 1 of 1

[Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded	
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New 
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	27 Recorded	Record New 

25 50 100 | << first < previous next > last >>

Step 2: Scroll down to Company Users, Email & Security. Select **User Access – By tool**

Company Users, Email & Security



Manage Users



User Access - By User



User Access - By Tool



User Access Requests



Company Teams



Invite New User



Company Email Alerts



Company Security Settings



Company Privacy Settings

Step 3: Select the tool, then the site the person relates too. The select **Grant New User Access**

Settings **Update User Access Levels**

Please select a subscription and a site (if applicable) from the dropdowns. Click on 'Load User Roles' to refresh the table with your selected options.

Subscription Customer Complaints Manager

Site IPL (Group)

[Load User Roles](#)

5/10 user accesses for this subscription have been granted to users in your company.

[+ Grant New User\(s\) Access](#)

User	Site	View Access	Edit	Admin	Approve Documents	Customer Access	Supplier Types	
Steve Jones	IPL	All Company Sites	✓	✓	✓	-	All Supplier Types	Update
Eric Knowles	IPL	IPL (Group)	✓	✓	✓	-	All Supplier Types	Update
Sally Mitchell	IPL	IPL (Group)	✓	✓	✓	-	All Supplier Types	Update

5.1.1 GRANT VIEW ACCESS

Step 1: Select user and set **View Access** to View their site only. Select **Save** when done

User Access Levels

Subscription Customer Complaints Manager

User 1 user(s) may be granted access/allocated roles for this subscription.

☒ Lauren Bush
☐ Michelle Campbell
☐ Jim Owen
☐ Mark Ritchie
☐ Tom Stanton

View Access View their site only

Subscription Roles
☐ Record
☐ Create/Edit Template
☐ Share
☐ Admin
☐ Respond

Supplier Type ☒ All Types ☐ Selected Types Only

Notify user of role change(s) ? ☐ Email Notification

[Cancel](#) [Save](#)

5.1.1.1 VIEW ACCESS PER SITE

Step 1: Select View Specific Sites from the dropdown of View Access. Then choose the sites they can view by ticking them. Once done select **Save**

User Access Levels

Subscription

Customer Complaints Manager

User

1 user(s) may be granted access/allocated roles for this subscription.

☒ Lauren Bush
 ☐ Michelle Campbell
 ☐ Jim Owen
 ☐ Mark Ritchie
 ☐ Tom Stanton

View Access

View specific sites

View Specific Sites

☐ IPL (Group)
 ☒ Sittingbourne
 ☐ Snetterton
 ☒ Telford

Subscription Roles

☐ Record
 ☐ Create/Edit Template
 ☐ Share
 ☐ Admin
 ☐ Respond

Cancel

Save

5.1.2 GRANT RECORD ACCESS

Step 1: Select Record for the user. Then select **Save** when done

User Access Levels

Subscription

Customer Complaints Manager

User

1 user(s) may be granted access/allocated roles for this subscription.

☒ Lauren Bush

☐ Michelle Campbell

☐ Jim Owen

☐ Mark Ritchie

☐ Tom Stanton

View Access

View their site only

Subscription Roles

☒ Record

☐ Create/Edit Template

☐ Share

☐ Admin

☐ Respond

Supplier Type

☒ All Types

☐ Selected Types Only

Notify user of role change(s) ?

☐ Email Notification

Cancel

Save

5.1.3 GRANT CREATE/EDIT TEMPLATE ACCESS

Step 1: Select Create/Edit template for the user. The select **Save** when done

User Access Levels

Subscription	Customer Complaints Manager
User	<div><div>1 user(s) may be granted access/allocated roles for this subscription.</div><div><input checked="" type="checkbox"/> Lauren Bush <input type="checkbox"/> Michelle Campbell <input type="checkbox"/> Jim Owen <input type="checkbox"/> Mark Ritchie <input type="checkbox"/> Tom Stanton</div></div>
View Access	<div>View their site only</div>
Subscription Roles	<div><input checked="" type="checkbox"/> Record <input checked="" type="checkbox"/> Create/Edit Template <input type="checkbox"/> Share <input type="checkbox"/> Admin <input type="checkbox"/> Respond</div>
Supplier Type	<div><input checked="" type="radio"/> All Types <input type="radio"/> Selected Types Only</div>
Notify user of role change(s) ?	<div><input type="checkbox"/> Email Notification</div>

Cancel

Save

5.1.4 GRANT SHARE ACCESS

Step 1: Select Share for the user. The select **Save** when done

User Access Levels

Subscription

Customer Complaints Manager

User

1 user(s) may be granted access/allocated roles for this subscription.

☒ Lauren Bush

☐ Michelle Campbell

☐ Jim Owen

☐ Mark Ritchie

☐ Tom Stanton

View Access

View their site only

Subscription Roles

☒ Record

☒ Create/Edit Template

☒ Share

☐ Admin

☐ Respond

Supplier Type

☒ All Types

☐ Selected Types Only

Notify user of role change(s) ?

☐ Email Notification

Cancel

Save

5.1.5 GRANT ADMIN ACCESS

Step 1: Select Admin for the user. The select **Save** when done

User Access Levels

Subscription

Customer Complaints Manager

User

1 user(s) may be granted access/allocated roles for this subscription.

☒ Lauren Bush

☐ Michelle Campbell

☐ Jim Owen

☐ Mark Ritchie

☐ Tom Stanton

View Access

View their site only

Subscription Roles

☒ Record

☒ Create/Edit Template

☒ Share

☒ Admin

☐ Respond

Supplier Type

☒ All Types ☐ Selected Types Only

Notify user of role change(s) ?

☐ Email Notification

Cancel

Save

5.1.6 GRANT RESPOND ACCESS

Step 1: Select Respond for the user. The select **Save** when done

User Access Levels

Subscription

Customer Complaints Manager

User

1 user(s) may be granted access/allocated roles for this subscription.

☒ Lauren Bush
 ☐ Michelle Campbell
 ☐ Jim Owen
 ☐ Mark Ritchie
 ☐ Tom Stanton

View Access

View their site only

Subscription Roles

☒ Record
 ☒ Create/Edit Template
 ☒ Share
 ☒ Admin
 ☒ Respond

Supplier Type

☒ All Types
 ☐ Selected Types Only

Notify user of role change(s) ?

☐ Email Notification

Cancel

Save

5.1.7 ACCESS LEVEL

You can restrict or grant the access level further by selecting suppliers that the user can view, respond too etc.

5.1.7.1 GRANTING SUPPLIER TYPES ACCESS

Step 1: Select All Types under **Supplier types**. This means this user can view all types of suppliers. Select **Save** when done

The screenshot shows the 'User Access Levels' configuration window for the 'Customer Complaints Manager' subscription. The window is divided into several sections:

- Subscription:** Customer Complaints Manager
- User:** A list of users with checkboxes. A blue banner indicates '1 user(s) may be granted access/allocated roles for this subscription.' The users listed are:
 - ☒ Lauren Bush
 - ☐ Michelle Campbell
 - ☐ Jim Owen
 - ☐ Mark Ritchie
 - ☐ Tom Stanton
- View Access:** A dropdown menu set to 'View their site only'.
- Subscription Roles:** A list of roles with checkboxes, all of which are selected:
 - ☒ Record
 - ☒ Create/Edit Template
 - ☒ Share
 - ☒ Admin
 - ☒ Respond
- Supplier Type:** Two radio buttons. The 'All Types' option is selected and highlighted with a red box. The 'Selected Types Only' option is unselected.
- Notify user of role change(s) ?** An unchecked checkbox for 'Email Notification'.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right. The 'Save' button is highlighted with a red box.

Step 2: If you want to restrict access, select Selected types only, under **Selected Types**

User Access Levels

Subscription

Customer Complaints Manager

User

1 user(s) may be granted access/allocated roles for this subscription.

☒ Lauren Bush

☐ Michelle Campbell

☐ Jim Owen

☐ Mark Ritchie

☐ Tom Stanton

View Access

View their site only

Subscription Roles

☒ Record

☒ Create/Edit Template

☒ Share

☒ Admin

☒ Respond

Supplier Type

☐ All Types

☒ Selected Types Only

Types

1 Selecting No supplier types defaults to All

Cancel

Save

Step 3: The supplier types options opens up for you to select which suppliers they can view. Select suppliers then select **Save** when done.

User Access Levels

Supplier Type ☐ All Types ☒ Selected Types Only

Types


Selecting No supplier types defaults to All

- ☒ Meat Processor
- ☒ Primal Processor
- ☒ Meat Retail Packer
- ☐ Internal
- ☐ Customer
- ☐ Finished Foods
- ☐ Transport
- ☐ Abattoirs
- ☐ Distribution centres
- ☐ Cold stores
- ☐ Agent / Broker
- ☐ Services
- ☐ Farm
- ☐ Fruit
- ☐ Seafood
- ☐ Oil

Cancel **Save**

5.2 HOW TO AMEND A USER'S ACCESS

Step 1: Select the **Settings** Icon



News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾ 

Customer Complaint Manager

Complaint Templates ← Received Customer Complaints Activity Overview Reports ▾ Admin

Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#) Viewing 2 results | Page 1 of 1

[Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	27 Recorded	Record New	

25 50 100 | << first < previous next > last >>

Step 2: Scroll down to Company Users, Email & Security. Select **User Access – By tool**

► Company Users, Email & Security



Manage Users



User Access
- By User



User Access
- By Tool



User Access
Requests



Company Teams



Invite New User



Company Email
Alerts



Company Security
Settings



Company Privacy
Settings

Step 3: Select the tool, then the site the person relates too. Then select **Load User Roles**

Settings **Update User Access Levels**

Please select a subscription and a site (if applicable) from the dropdowns. Click on 'Load User Roles' to refresh the table with your selected options.

Subscription **Customer Complaints Manager** ▾

Site **Telford** ▾

Load User Roles

9/10 user accesses for this subscription have been granted to users in your company.

[Grant New User\(s\) Access](#)

Q Search your Company Users...

User	Site	View Access	Record	Create/Edit Template	Share	Admin	Respond	Customer Access	Supplier Types	
Lauren Bush	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	Update
Mark Ritchie	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	Update

Step 4: Then select **Update** beside the user

Settings [Update User Access Levels](#)

Please select a subscription and a site (if applicable) from the dropdowns. Click on 'Load User Roles' to refresh the table with your selected options.

Subscription

Site

9/10 user accesses for this subscription have been granted to users in your company.

Search your Company Users...										
User	Site	View Access	Record	Create/Edit Template	Share	Admin	Respond	Customer Access	Supplier Types	
Lauren Bush	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	<input type="button" value="Update"/>
Mark Ritchie	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	<input type="button" value="Update"/>

Step 5: Change *Subscription Roles* to the new requirements, then select *Save when done*

User Access Levels

Subscription

Customer Complaints Manager

User

Lauren Bush

Site

Telford

View Access

View their site only

Subscription Roles

☐ Record
☐ Create/Edit Template
☐ Share
☒ Admin
☒ Respond

Supplier Type

☒ All Types
 ☐ Selected Types Only

Notify user of role change(s) ?

☐ Email Notification


Remove Access

Cancel





Save

5.3 HOW REMOVE A USER'S ACCESS

Step 1: Select the **Settings** Icon



News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾ 

Customer Complaint Manager

 **Complaint Templates** ← Received Customer Complaints  Activity Overview  Reports ▾  Admin

Currently viewing **ALL SITES** Customer Complaint Templates [Change Site](#) Viewing 2 results | Page 1 of 1

[Add New](#) [Duplicate Selected](#) [Delete Selected](#)

<input type="checkbox"/>	Last Modified	Title	Created By	Recorded		
<input type="checkbox"/>	05/05/2020 09:54:28	SB Customer Complaints Log	Steve Jones	4 Recorded	Record New	
<input type="checkbox"/>	05/05/2020 09:51:48	Complaints Log	Steve Jones	27 Recorded	Record New	

25 50 100 | << first < previous next > last >>

Step 2: Scroll down to Company Users, Email & Security. Select **User Access – By tool**

Company Users, Email & Security

 Manage Users

 User Access - By User

 User Access - By Tool

 User Access Requests

 Company Teams

 Invite New User

 Company Email Alerts

 Company Security Settings

 Company Privacy Settings

Step 3: Select the tool, then the site the person relates too. Then select **Load User Roles**


Settings Update User Access Levels

Please select a subscription and a site (if applicable) from the dropdowns. Click on 'Load User Roles' to refresh the table with your selected options.

Subscription **Customer Complaints Manager** ▾

Site **Telford** ▾

[Load User Roles](#)

 9/10 user accesses for this subscription have been granted to users in your company.

[Grant New User\(s\) Access](#)

 Search your Company Users...

User	Site	View Access	Record	Create/Edit Template	Share	Admin	Respond	Customer Access	Supplier Types	
Lauren Bush	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	Update
Mark Ritchie	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	Update

Step 4: Then select **Update** beside the user

Settings [Update User Access Levels](#)

Please select a subscription and a site (if applicable) from the dropdowns. Click on 'Load User Roles' to refresh the table with your selected options.

Subscription

Site

9/10 user accesses for this subscription have been granted to users in your company.

<input type="text" value="Search your Company Users..."/>										
User	Site	View Access	Record	Create/Edit Template	Share	Admin	Respond	Customer Access	Supplier Types	
Lauren Bush	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	<input type="button" value="Update"/>
Mark Ritchie	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	<input type="button" value="Update"/>

Step 5: Select **Remove Access**

User Access Levels

Subscription

Customer Complaints Manager

User

Lauren Bush

Site

Telford

View Access

View their site only

Subscription Roles

☐ Record
☐ Create/Edit Template
☐ Share
☒ Admin
☒ Respond

Supplier Type

☒ All Types
 ☐ Selected Types Only

Notify user of role change(s) ?

☐ Email Notification

Step 6: The user is now removed

Settings [Update User Access Levels](#)

Success: User roles have been updated.

Please select a subscription and a site (if applicable) from the dropdowns. Click on 'Load User Roles' to refresh the table with your selected options.

Subscription

Customer Complaints Manager

Site

Telford

Load User Roles

8/10 user accesses for this subscription have been granted to users in your company.

Grant New User(s) Access

User	Site	View Access	Record	Create/Edit Template	Share	Admin	Respond	Customer Access	Supplier Types	
Mark Ritchie	Telford	Telford	✓	✓	✓	✓	✓	-	All Supplier Types	<div>Update</div>