A large, light blue geometric shape, resembling a stylized arrow or a mountain peak, is positioned in the upper half of the page. It is composed of several triangular and quadrilateral sections meeting at various angles.

Industrial CRM
**Customer Survey
Management**

USER GUIDE

Updated June 20, 2019

UPTAKE

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Disclaimer

We update the Customer Survey Management application frequently. This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates. Please review the most current version of this guide regularly and with care.

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Introduction

Welcome to Customer Survey Management. This application is a survey response collection and reporting tool that cofunctions with SalesLink to search for customers and report activities and issues.

NOTE: Customer Survey Management currently only supports the Google Chrome™ browser.

Customization

This user guide will show you how to use Customer Survey Management with the assumption that your dealership has made the migration to CloudLink and your application has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

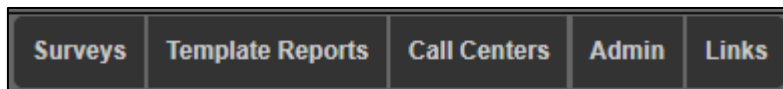
NOTE: This user guide is continuously being updated. Please check back frequently for the most recent version.

Customer Survey Management

Log in to CloudLink with your Username and Password, then click the **[Enter]** button under **Customer Survey Management**. You will be taken to the Survey Lists page.

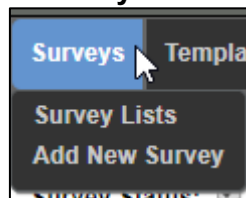
Navigation Bar

At the top of the screen is a navigation bar that can be accessed from anywhere in the Application.



Surveys

View and manage the surveys using the **Surveys** menu.



Survey Lists

Survey	Template	Survey Status	Call Center	Total Customers	Records	Assigned Yes	Assigned No	Not Started	In Progress	Call Status No Response	Asked to Call Later	Completed	Issues
Northeast Survey		In Progress	The Survey Group	3426	0007	0	0007	0	0	0	0	0	0
Western Survey	Survey A	In Progress	The Smith Group										
Total: 2 survey(s)				3431	8109	0	8109	12	0	0	0	0	610

View and filter for both in progress and completed surveys on the Survey Lists page. This page allows you to filter surveys by date range, call center, and status. Click on a Survey name to view the survey’s details.

Survey Details

Survey No: 253 - Survey Details

Survey Header Save

Survey Name: test

Description: test survey

Survey Status: In Progress Call Center: CAT Template: CAT - CSA Survey

[CAT Loyalty Summary](#)
[Target List](#)
[Template Questions](#)
Common Tasks

Details Invoice Master Lists Customer Master Lists

Completed From: Jun 20, 2018 To Date: Jun 20, 2019

Call Status: Not Started No Response Asked to Call Later In Progress Completed Pending Resolved

Assigned: All Issues: All

There is no data available

The Survey Details page provides in-depth information on a survey including an overview, question results, promoter score, target list, and survey questions. Filter by date, division, store, or status to view more specific information.

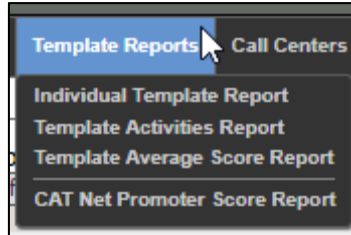
Add New Survey

To add a new survey:

1. In the **Surveys** menu, select **[Add New Survey]**.
2. Fill out and select the following fields:
 - a. Survey Name
 - b. Survey Description
 - c. Survey Status
 - d. Call Center
 - e. Template
3. Click **[Save]**.

Please note that **Survey Name** is the only required field.

Template Reports



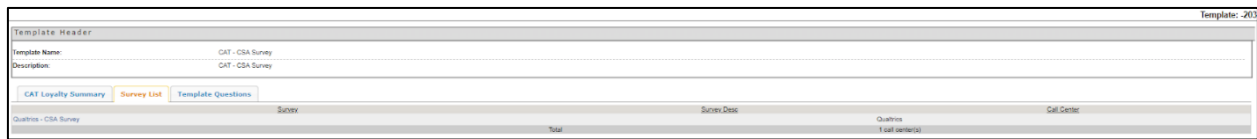
Gain insights into templates and their activity in the **Template Reports** menu.

Individual Template Report

Template Name	Template Class	Next Step
CAT - CSB Survey	CAT - CSB Survey	Next Step
CAT - Field Service Survey	CAT - Field Service Survey	Next Step
CAT - Initial Purchase Survey	CAT - Initial Purchase Survey	Next Step
CAT - Parts and Service Survey	CAT - Parts and Service Survey	Next Step
CAT - Parts Purchase Survey	CAT - Parts Purchase Survey	Next Step
CAT - Product Use Survey	CAT - Product Use Survey	Next Step
CAT - Rental Survey	CAT - Rental Survey	Next Step
CAT - Sales Survey	CAT - Sales Survey	Next Step
CAT - Shop Service Survey	CAT - Shop Service Survey	Next Step
Northeast Survey	Survey in Northeast region	Next Step

A list of both active and inactive templates can be viewed on the Individual Template Report page. Click on the name of the template to view more details. Click **[Next Step]** to view the surveys associated with the selected template.

Individual Template Details Page



The Individual Template Details Page displays an overview of the template in the Template Header. Additionally, the CAT Loyalty Summary, the list of surveys associated with this template, and the template questions can be viewed by clicking the appropriate tab.

Template Activities Report

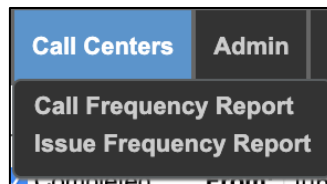
Template Activities Report

Dealer Defined Template Status: Active Inactive [Show Results](#)

Call Center	Template	Tot.Cust	Tot.Records	Not Started	In Progress	No Response	Call Later	Completed	Issue
Daniel Group	Daniel Group Survey	3425	8097	0	0	0	0	0	810
	Subtotal (Excludes duplicate)	3425	8097	0	0	0	0	0	810
Ransom	CAT - Initial Purchase Survey	2	0	0	0	0	0	0	0
	Daniel Group Survey	3	3	3	0	0	0	0	0
	Subtotal (Excludes duplicate)	5	12	12	0	0	0	0	0
All	CAT - Initial Purchase Survey	2	0	0	0	0	0	0	0
All	Daniel Group Survey	3425	8100	3	0	0	0	0	810
	Subtotal (Excludes duplicate)	3429	8106	12	0	0	0	0	810

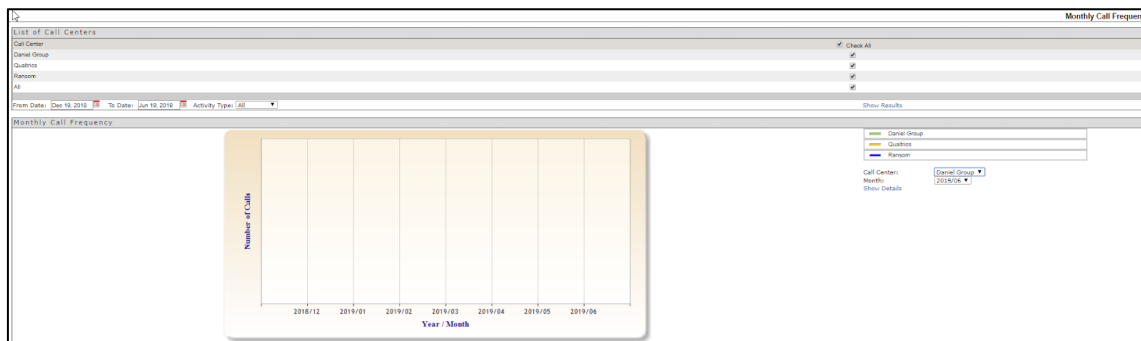
Quickly view the status and any actions taken on both inactive and active templates at a glance with the Template Activities Report.

Call Centers



Utilize the **Call Center** menu to access visualized call center reporting.

Call Frequency Report

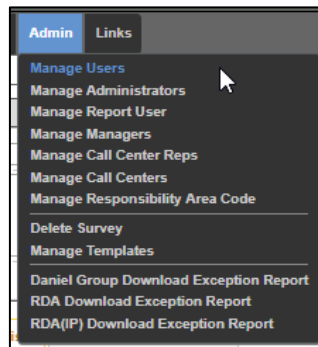


Visualize the monthly call frequency with the Call Frequency Report. Select the checkboxes of the desired call center or check **Select all** and click **[Show Results]** to view the results. Filter by date range and call center for more detailed results.

Issue Frequency Report

Gain insight into trends in Issue reporting with the Issue Frequency Report. Select the checkboxes of the desired call center or check **Select all** and click **[Show Results]** to view the results.

Admin



Roles are assigned by administrators and each user can have multiple roles. The links within the application will vary depending on the role(s) of the user. The user's assigned roles will be listed beside their username.

Customer Survey Management also serves as a Survey Hub. Dealerships have the ability to add configurable third-party surveys and run reports from within Customer Survey Management. These can be run from the Admin Tab at the bottom.

Manage Users

User Administration									(Secured)
Flag	Name	Title	Login Name	Office	Company	Comments	Last Access	Changed By	Add
	Kori		CloudLink\Wallace620	R/E Hampton			Apr 27, 2016 12:18 PM	Andrew454 on Feb 22, 2012	
	Ayers, Diana	Development Consultant	CloudLink\Frank983		Canam Solutions Inc		Jan 26, 2016 6:39 PM	Danny646 on Jan 26, 2016	
	Beck, Zachery		CloudLink\Kandrick185				Dec 18, 2012 3:29 PM	Andrew454 on Feb 22, 2012	
	Blevins, Carr		CloudLink\Olivia522				Aug 3, 2016 2:26 PM	Andrew454 on Jul 26, 2012	
	Booth, Athena		CloudLink\Jeffrey740				Sep 6, 2016 3:27 PM	Andrew454 on Sep 20, 2011	
	Cantu, Coy		CloudLink\Zachary341	Bensalem			Apr 4, 2017 1:46 PM	Jennifer238 on Aug 10, 2012	
	Charles, Wanda		CloudLink\Wendy837				Dec 19, 2017 12:30 PM	Jennifer238 on Jun 18, 2013	
	CLMonitor, cloudlinkmonitor		CloudLink\cloudlinkmonitor			Lorem ipsum dolor sit amet	Sep 17, 2016 6:01 PM	demouse2 on Jun 6, 2018	
	CLMonitor, cloudlinksoo		CloudLink\cloudlinksoo			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Jun 6, 2018	
	Compton, Theron		CloudLink\Daphne914				<Never Access>	Jennifer238 on Mar 7, 2014	
	Daniels, Elisa		CloudLink\Jesus121	Bensalem			Jun 26, 2017 3:22 PM	Jennifer238 on Sep 18, 2013	
	Daniels, Leslie		CloudLink\Eugene771				Oct 31, 2016 3:53 PM	Suzanne168 on May 31, 2007	
	Davila, Marion		CloudLink\Abraham728				Feb 25, 2016 8:24 AM	Andrew454 on Sep 20, 2011	
	De Leon, Tarik		CloudLink\Clayton556				<Never Access>	Deanna513 on Sep 2, 2011	
	Decker, Erika		CloudLink\Ernest103				Apr 14, 2016 4:11 PM	Andrew454 on Nov 11, 2011	
	Demo, aclay		CloudLink\aclay			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Jan 22, 2019	
	Demo, adait		CloudLink\adait			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Jun 21, 2016	
	Demo, adistler		CloudLink\adistler			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Jan 22, 2019	
	Demo, ahmeds		CloudLink\ahmeds			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Jul 3, 2018	
	Demo, ajanderson		CloudLink\ajanderson			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Nov 6, 2018	
	Demo, alice.hultquist		CloudLink\alice.hultquist			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Aug 29, 2018	
	Demo, alilarj		CloudLink\alilarj				<Never Access>	demouse2 on May 3, 2018	
	Demo, amessaoudi		CloudLink\amessaoudi			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Jan 22, 2019	
	Demo, andy.debrun		CloudLink\andy.debrun			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Aug 29, 2018	
	Demo, elutite		CloudLink\elutite			Lorem ipsum dolor sit amet	<Never Access>	demouse2 on Jan 22, 2019	

Add, remove, and edit users on the Manage Users page.

To add a new user, click **[Add]** and search for the user using their last name. If the user will need the ability to add more users to the application, select the **User Admin** checkbox. Click **[Add]** to add the new user.

Edit a user by clicking on the pencil column in the far-right column of the user. To remove access, select the red X in the far-right column of the user.

Manage Administrators

Name	Title	Login Name	Add
Demo, Demouser1		demouser1	[Add] [Pencil] [X]
Demo, Demouser2		demouser2	[Add] [Pencil] [X]
Smith, James		Monica@144	[Add] [Pencil] [X]
Marshall, Janet		Charm@113	[Add] [Pencil] [X]
Hodsdon, Marie		Mindy050	[Add] [Pencil] [X]
Nguyen, Binh		Mark@231	[Add] [Pencil] [X]
Parks, Caryn		Jenni@238	[Add] [Pencil] [X]

Administrators have the capabilities to all the functions in Customer Survey Management including granting the Administrator role to other users. In addition, their roles will include adding users of all roles as well as managing Call Centers and Surveys.

Add and remove Administrators on the Manage Administrators page. Click **[Add]** and search for the user using their last name. Click **[Find]** and click **[Select]** next to the user you wish to make an Administrator.

Manage Report User

Name	Title	Login Name	Add
Smith, James		Jeff@710	[Add] [Pencil] [X]
Smith, James		Abraham720	[Add] [Pencil] [X]
Hoek, Benjamin		Vernon227	[Add] [Pencil] [X]
Gardner, Cassandra		Andrew@154	[Add] [Pencil] [X]
Harris, Charles		Joseph@055	[Add] [Pencil] [X]
Harrington, Guadalupe		Shanna154	[Add] [Pencil] [X]
Ingram, Shayne		Lashna768	[Add] [Pencil] [X]
Madison, Michael		Chrysal@095	[Add] [Pencil] [X]
Marshall, Janet		Sharon@113	[Add] [Pencil] [X]
Michael, Rachel		Darlene@445	[Add] [Pencil] [X]
Parks, Caryn		Jenni@238	[Add] [Pencil] [X]
Popler, Dennis		Colby@817	[Add] [Pencil] [X]
Newton, Jim		Isabel@551	[Add] [Pencil] [X]
Stone, Rory		Theodore@885	[Add] [Pencil] [X]
Webster, James		Opal714	[Add] [Pencil] [X]

Report Users have access to the reports in Customer Survey Management. They can be assigned to one or more reports.

Add and remove Report Users on the Manage Report Users page. Click **[Add]** and search for the user using their last name. Click **[Find]** and click **[Select]** next to the user you wish to make a Report User.

After adding the Report User, one or more reports will need to be assigned. The administrator will need to assign the call center by clicking on the pencil icon next to the user's name, selecting the report(s) that the user is assigned to, and clicking on **[Assign]**.

Manage Managers

Name	Title	Login Name	Actions
Gomez, Thad		Play273	<input type="button" value="Add"/> <input type="button" value="Find"/> <input type="button" value="X"/>

Managers in Customer Survey Management have access to assign call center reps to surveys and reports pertaining to their assigned surveys. They can be assigned to more than one call center and more than one survey.

Add and remove Managers on the Manage Managers page. Click **[Add]** and search for the user using their last name. Click **[Find]** and click **[Select]** next to the user you wish to make a Manager.

After adding the manager, one or more call centers will need to be assigned. The administrator will need to assign the call center by clicking on the pencil icon next to the user’s name, selecting the call center(s) that the manager is assigned to, and clicking on **[Assign]**.

Manage Call Center Reps

Name	Title	Login Name	Manager Name	Actions
Watson, Joyce		Tina700		<input type="button" value="Add"/> <input type="button" value="Find"/> <input type="button" value="X"/>

Call Center Reps are to complete the surveys by contacting the customer. Add and remove Call Center Reps on the Manage Call Center Reps page. Click **[Add]** and search for the user using their last name. Click **[Find]** and click **[Select]** next to the user you wish to make a Call Center Rep.

Manage Call Centers

Call Center Name	CAT	Name Group	Qualities	Name	Actions
					<input type="button" value="Add"/> <input type="button" value="Find"/>

Call Centers represent a group of individuals who are tasked with complete the surveys that are created by the Administrators.

To add a call center name, click **[Add]**. Enter the name of the new call center and click **[Add]**.

Manage Responsibility Area Code

Responsibility Area	Service Type	
10	Field	<input type="button" value="Add"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
11	Shop	<input type="button" value="Update"/> <input type="button" value="Delete"/>
12	Field	<input type="button" value="Update"/> <input type="button" value="Delete"/>
13	Field	<input type="button" value="Update"/> <input type="button" value="Delete"/>
14	Field	<input type="button" value="Update"/> <input type="button" value="Delete"/>
15	Field	<input type="button" value="Update"/> <input type="button" value="Delete"/>
16	Field	<input type="button" value="Update"/> <input type="button" value="Delete"/>
17	Field	<input type="button" value="Update"/> <input type="button" value="Delete"/>

To add a Responsibility Area Code, click **[Add]**. Enter the desired Responsibility Area Code, select weather it is a field or shop area code. Click **[Update]** to save.

Delete Survey

Survey	Call Center	Survey Status	
Northeast Survey	Green Group	In Progress	
New Customer Survey	Smith Group	In Progress	<input type="button" value="Delete"/>
test	Green Group	In Progress	<input type="button" value="Delete"/>
Returning Customers	Green Group	In Progress	<input type="button" value="Delete"/>
Test Survey	Smith Group	In Progress	

Delete unwanted surveys on the Delete Survey page. Click the red X in the row of the survey you would like to delete. Select **[OK]** to confirm deletion.

Manage Templates

Template Name	Template Desc	Status	
Northeast Survey	Northeast region	Active Inactive Template	<input type="button" value="Add"/> <input type="button" value="Copy"/>
Parts and Service Survey	PSS	Active Inactive Template	<input type="button" value="Copy"/> <input type="button" value="Delete"/>
Spring Survey	Feb-May	Active Inactive Template	<input type="button" value="Copy"/> <input type="button" value="Delete"/>
test survey		Active Inactive Template	<input type="button" value="Copy"/> <input type="button" value="Delete"/>
West Survey	West Region	Active Inactive Template	<input type="button" value="Copy"/> <input type="button" value="Delete"/>
Copy of West Survey		Active Inactive Template	<input type="button" value="Copy"/>
Customer Loyalty Survey		Active Inactive Template	<input type="button" value="Copy"/> <input type="button" value="Delete"/>
New Customer Survey		Active Inactive Template	<input type="button" value="Copy"/>
test	test	Active Inactive Template	<input type="button" value="Copy"/> <input type="button" value="Delete"/>

Add, edit, copy, delete, and deactivate dealer templates on the Manage Templates page. To create a new template:

1. Click **[Add]**.
2. Enter the desired name of the template.
3. If desired, enter a description of the template.
4. Click **[Save]**.
5. Once saved, a question section appears. Add questions as needed.
6. Click **[Add]**.
7. Enter the question text and select a question type.
8. Click **[Save]**.