

## Lesson - Logging Feedback

This lesson looks at how to log new Feedback.

### Logging Feedback

- Go to the **Go To** menu
- Select **Feedback**
- From the Feedback sub-menu select the **Log a new Feedback item** button.

### Details

- Select the **Feedback Type**

**Note:** Your reference ID and Due Date are set in line with the Feedback Type configuration.

The Opened Date is set to today's date.

- Change the **Opened Date** to yesterday
- Enter the **Title**: TEST Supplier has found error with printed materials [your initials].
- Enter the **Description**: The phone number supplied to suppliers is incorrect on printed materials.
- Select the **Source** from the drop down menu
- Click **Contacts** on the left-hand side.

### Contacts

If the contact for this complaint has contacted us before, then you can search for them using the search field, but let's add a new one for this complaint.

- Click the **Create a new Contact** button; this will open a pop-up window.
  - Type in a Title, First Name, Surname: Mr Matthew Mouse

This will compile the full name for you.

- Enter an email address: mattey.mouse@hotmail.com
- Click the **Address** tab at the top of the pop-up window.
- Enter an address: 10 High Street [your initials]
- Click the **Equality** tab at the top of the pop-up window.
- Select the **Gender** from the drop down list

- Select the **Ethnicity** from the drop down list
  - Click the **Save and Close** button to save the contact's details.
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- Open the **Contact Type** drop down list (in the table at the top of the main window).
  - Select the contact type from the list
  - Click **Confirm** on the left-hand side.

### **Confirm**

A summary of the Feedback is displayed.

- Click the **Save & Create Another** button.

### **Creating another Feedback item**

- Enter the **Title**: TEST Not very efficient service [your initials].
- Enter the **Description**: Everyone was very unhelpful.
- Select the **Source** from the drop down menu
- Click **Contacts**

### **Find the contact that you added earlier:**

- Type part of their name or address in the **Search for an Existing Contact** field: Mouse
- Click the **Search** button.

A list of matching contacts is displayed.

- Select the contact - or contacts - to add by putting a tick next to their name: Mr Matthew Mouse
- Click the **Add Selected** button.

The contacts are added to the Feedback.

- Open the **Contact Type** drop down list (in the table at the top of the main window).
- Select the contact type from the list
- Click **Confirm**

A summary of the Feedback is displayed.

- Click the **Finish & Save** button.

The Feedback opens.

- Go to the **Go To** menu and select **Home**.