

SOP: Handling a Complaint Case

Customer Service > Complaint Cases · Oct 26, 2026 · @Ivy

Purpose

Use this SOP to log a customer complaint in the ERP, move it step by step from the first message to closing, and make sure nobody is left waiting. Every complaint is **one case**. The case sheet shows the next step, who owns it, and what is still open, so nothing depends on remembering. The pictures use made-up sample customers.

Who does what

Role	What they do on a case
Admin	Logs the case, tells the CS Team Leader and the managers, books the recovery (redo) or adds the Fresha staff alert for a discount.
CS Team Leader	Acknowledges the customer, sends the offer, follows up after the recovery, and closes the case.
Area Outlet Manager / General Manager	Decides the offer or resolution. The General Manager is brought in with Escalate to GM .
Customer	Accepts or declines the offer (the case waits for this).
Finance	Processes any refund or credit that was sent to them.
Head Trainer	Coaching or training for the therapist when the case needs it.

Before you start

- You are signed in to the ERP and can open **Customer Service**.
- You have the customer's name, the outlet, what happened, and any photos or screenshots.

Steps

Step 1 — Open the Complaint Cases board

Go to **Customer Service > Complaint Cases**. The board has one column for **who acts next** (Admin, CS Team Leader, Managers, Waiting on customer, Closed).

Complaint Cases
The complaint SOP, from the Teams Complaint Case Report. Open a case for the thread, photos, money and who acts next.

1 5 All cases Showing everything

2 CS Team Leader queue Steps 2, 5 and 9

1 Managers queue Step 4: offer, and anything escalated to the GM

0 Training queue Head Trainer to decide

1 GM involved GM called or escalated

1 Waiting on customer Step 6

3 Overdue at step Past the limits above

0 Can close? Thread says close; tag still #OPEN

0 Refund with Finance Pushed, not processed yet

0 Closed Step 10

► Red-flag limits (days)

Board Table Insights 5 shown · 5 open

Teams tag: Open and closed | Posted: Any date | Outlet: All outlets | Therapist: All therapists | Channel: All channels | Assigned to: Anyone | Search threads: Customer, phone, words in the thread

4 Admin Steps 1, 3, 7-8: log, tag managers, book recovery, Fresha alert

1 CS Team Leader Steps 2, 5, 9: acknowledge, send offer, follow up

2 Managers Step 4: offer or resolution, and cases escalated to the GM

1 Waiting on customer Step 6: accepts or declines

0 Closed Step 10 No cases here.

5 Sample Customer A WhatsApp #OPEN Step 1 New Entered here Cuppage · Therapist: Therapist A · WhatsApp Customer says the polish chipped after two days and asks for a redo. Posted 25 Oct 1 replies Last 25 Oct Staff: Area Outlet Manager to handle

Sample Customer B WhatsApp #OPEN Step 2 Ack Entered here Kovan · Therapist: Therapist A · WhatsApp Skin irritation after the facial. Customer sent photos. Posted 24 Oct 1 replies Last 24 Oct Flag: Stuck 2 days at step 2 (limit 1) Staff: Area Outlet Manager to handle

Sample Customer C WhatsApp #OPEN Step 4 Mgr GM involved Entered here Aljunied · Therapist: Therapist A · WhatsApp Appointment was started 30 minutes late and the lashes were uneven. Posted 23 Oct 1 replies Last 23 Oct Flag: Stuck 3 days at step 4 (limit 2) Staff: Area Outlet Manager to handle

Sample Customer D WhatsApp #OPEN Step 6 Accept Entered here Eng Kong Terrace · Therapist: Therapist A · WhatsApp Offer sent: free touch-up. Waiting for the customer to reply. Posted 22 Oct 1 replies Last 22 Oct Staff: Area Outlet Manager to handle

Sample Customer E WhatsApp #OPEN Step 9 Follow Entered here Choa Chu Kang · Therapist: Therapist A · WhatsApp Redo booked. CS Team Leader to check with the customer after the visit. Posted 21 Oct 1 replies Last 21 Oct

1 The tiles count cases by queue: CS Team Leader queue, Managers queue (also holds cases escalated to the GM), Waiting on customer, Overdue, Can close, Refund with Finance, Closed. Press a tile to show only those cases, and press **All cases** to go back. **2** **SOP Guide** opens this guide. **3** **+ New case** logs a complaint. **4** Each column shows the SOP steps it covers. **5** A card with a **red outline** has sat too long at its step: act on it first.

Step 2 — Log the complaint: + New case

Press + **New case**. Fill in the boxes and press **Create case**.

The screenshot shows a web form titled "New complaint case · logged by Staff" with a close button (X) in the top right. The main heading is "Open a case". The form is divided into several sections, each with a numbered red circle on the left margin:

- 1 Customer name ***: A text input field containing "e.g. Mrs Tan Mei Ling".
- 2 What happened ***: A large text area for the complaint details.
- 3 How serious**: Three buttons labeled "Normal", "Serious", and "Urgent". The "Normal" button is highlighted in black.
- 4 Therapist**: A dropdown menu with the text "+ add from the ERP staff list". Below it is a small note: "Optional. The outlet is filled in from the therapist if you leave it empty. Handlers are filled in automatically by role."
- 5 Photos**: A section with a "Choose Files" button and the text "No file chosen".
- 6 Create case**: Two buttons at the bottom, "Create case" and "Cancel".

At the bottom of the form, there is a note: "After you create it, the case has its SOP steps as actions (each Open or Done), and everything in it can be changed."

1 Customer name (required). Phone and how it came in (WhatsApp, call, walk-in...). **2 What happened** (required): what the customer said, in plain words. Appointment date, time and service help the manager decide. **3 How serious**: Normal, Serious or Urgent. **4 Therapist**: pick her from the ERP staff list. The outlet is filled in from her, and the Sales Hub complaint count follows from this. **5 Photos**: attach the customer's photos. **6 Create case**. The case now has all the SOP steps as rows, each Open or Done.

Step 3 — Open the case and read the NEXT bar

Click the case card. The case sheet opens on the right. Every box on it can be edited, and changes save as you go (there is no Save button).

CASE-03 · logged by Admin

Sample Customer C

#OPEN Aljunied Normal GM involved Saves as you go

NEXT
Manager decides the offer or resolution
Step 4 of 9 · Acts: Area Outlet Manager / GM — Xindy / Ee Lin · day 3 in this step
✓ Mark done
[not needed](#)

What we are giving Refund / credit + Add...
Nothing yet. Add a refund, credit, redo or discount if the customer is being offered something.
[View history](#)

What happened
Appointment was started 30 minutes late and the lashes were uneven.

Outcome

Who owns which step 3 of 9 done · next: Xindy / Ee Lin

☒ Admin informs the CS Team Leader	Admin	Done
☒ CS Team Leader acknowledges the customer	CS Team Leader	Done
☒ Admin informs the managers of the new case update	Admin	Done
☐ Manager decides the offer or resolution	Area Outlet Manager / GM Xindy / Ee Lin	not needed
☐ Send the offer to the customer	CS Team Leader	not needed
☐ Customer accepts the offer	Customer	not needed
☐ Book the recovery, or add the Fresha staff alert for a discount	Admin	not needed
☐ CS Team Leader follows up after the recovery	CS Team Leader	not needed
☐ Close the case	CS Team Leader	

Customer and visit 9123 4562 · WhatsApp · Aljunied

Therapist and handlers Therapist: Therapist A

Notes and money

Photos none

Replies and thread 0 messages

Add a reply... (paste a screenshot or file here with Ctrl+V)

8 Reply

1 Escalate to GM (top right) brings the General Manager in: the case moves to the Managers column and shows **GM involved**. **Undo GM** takes it back. **2** The black **NEXT** bar says which step is next, who owns it, and how many days it has been there. When that step is finished press ✓ **Mark done**. If a step does not apply, press **not needed**. **3 What we are giving**: the offer to the customer (Step 5). **4 Who owns which step**: the checklist below. **5** Notes, photos, replies and the history of the case.

Step 4 — Work through the steps in order

#	Step	Owner
1	Admin informs the CS Team Leader	Admin
2	CS Team Leader acknowledges the customer	CS Team Leader
3	Admin informs the managers of the new case update	Admin
4	Manager decides the offer or resolution	Area Outlet Manager / GM
5	Send the offer to the customer	CS Team Leader
6	Customer accepts the offer	Customer
7–8	Book the recovery, or add the Fresha staff alert for a discount	Admin
9	CS Team Leader follows up after the recovery	CS Team Leader
10	Close the case	CS Team Leader

Tick each step when it is really done. Whoever ticks it is recorded with the date, and the case moves to the next owner's column.

Step 5 — Record what we are giving the customer

In **What we are giving** press + **Add...** and choose the action. Each one becomes a row with an owner that stays Open until it is done.

CASE-03 · logged by Admin Undo GM ×

Sample Customer C

#OPEN Aljunied Normal GM involved Saved ✓ 16:51

NEXT
Manager decides the offer or resolution ✓ Mark done
Step 4 of 9 · Acts: Area Outlet Manager / GM — Xindy / Ee Lin · day 3 in this step [not needed](#)

What we are giving Refund / credit + Add... 1

☐ **Refund or credit to the customer** Open Owner: Finance [remove](#)

☐ Offered to customer

Payment proof
 Click here, then **Ctrl+V** to paste a screenshot or file · or drop a PDF / photo / document · or [choose](#)

▼ Details

Give back as Request type Amount (\$)

Money back Refund 0

Pay back by Customer originally paid by Fresha refund / sale #

— e.g. Fresha, card, Payl e.g. Refund #7861

Send to Finance 4

Owner Note

Finance

What happened [View history](#) ↓

1 The + **Add...** menu. **Offer to the customer:** complimentary redo / touch-up, discount (Fresha staff alert), refund money back, credit to wallet / sessions, product or aftercare. **Staff side:** Fresha staff alert for the therapist, incident report, coaching, warning, staff deduction. **Admin:** change the sale to the company, other action. **2** A refund row is owned by **Finance**. **3** Fill in **Give back as** (money back, wallet credit or sessions), the request type, the **amount**, how to pay back (PayNow / bank / cash) and the payee's details. Add the payment proof by pasting a screenshot (Ctrl+V) or dropping a file. **4** Press **Send to Finance**. The request appears in **Customer Service > Deposits & Refunds**. The row stays Open and turns Done only when Finance marks it Processed or Rejected. Do not mark it done yourself.

Step 6 — Escalate to the General Manager when needed

Use **Escalate to GM** for difficult customers or anything the Area Outlet Manager wants the GM to handle. The GM is told, and the case shows under **Managers** with the **GM involved** tag until **Undo GM** is pressed.

Step 7 — Follow up and close the case

After the recovery the CS Team Leader checks with the customer, then closes the case.

CASE-05 · logged by Admin

1 Escalate to GM X

Sample Customer E

#OPEN Choa Chu Kang Serious Saves as you go

NEXT

CS Team Leader follows up after the recovery

Step 8 of 9 · Acts: CS Team Leader · day 5 in this step

2 ✓ Mark done

not needed

What we are giving

Refund / credit + Add...

Nothing yet. Add a refund, credit, redo or discount if the customer is being offered something.

What happened

View history ↓

Redo booked. CS Team Leader to check with the customer after the visit.

Outcome

Who owns which step 7 of 9 done · next:

☒ Admin informs the CS Team Leader	Admin	Done
☒ CS Team Leader acknowledges the customer	CS Team Leader	Done
☒ Admin informs the managers of the new case update	Admin	Done
☒ Manager decides the offer or resolution	Area Outlet Manager / GM Xindy / Ee Lin	Done
☒ Send the offer to the customer	CS Team Leader	Done
☒ Customer accepts the offer	Customer	Done
☒ Book the recovery, or add the Fresha staff alert for a discount	Admin	Done
<div>3</div> ☐ CS Team Leader follows up after the recovery	CS Team Leader	not needed
<div>4</div> ☐ Close the case	CS Team Leader	

Customer and visit 9123 4564 · WhatsApp · Choa Chu Kang

1 Escalate to GM is still available on an open case. 2 Mark done on the NEXT bar finishes the current step (here, the follow-up). 3 The follow-up row. 4 Close the case is the last row. A case cannot be closed while any other action is still Open (for example a refund waiting for Finance). Finish or mark those not needed first. Closed cases show in the Closed column.

Step 8 — Notes, photos, replies and history

The screenshot displays a case management interface with the following sections:

- What we are giving:** Includes a "Refund / credit" button and a "+ Add..." dropdown. Below is a text area with the placeholder "Nothing yet. Add a refund, credit, redo or discount if the customer is being offered something."
- What happened:** A text area containing "Appointment was started 30 minutes late and the lashes were uneven." with a "View history" link.
- Outcome:** An empty text area.
- Who owns which step:** A progress bar showing "3 of 9 done · next: Xindy / Ee Lin". It lists tasks with checkboxes, assignees, and status (e.g., "Admin Done", "CS Team Leader Done", "Area Outlet Manager / GM Xindy / Ee Lin not needed").
- Customer and visit:** Displays "9123 4562 · WhatsApp · Aljunied".
- Therapist and handlers:** Displays "Therapist: Therapist A".
- Notes and money:** A section header.
- Photos:** Displays "none".
- Replies and thread:** Shows "0 messages" and a text input field with a "Reply" button.
- History:** Lists events with timestamps and assignees (e.g., "23 Oct 17:00 Admin Case opened", "23 Oct Admin Teams Appointment was started 30 minutes late and the lashes were uneven.").
- Delete this case:** A red button at the bottom.

1 Who owns which step shows how far the case is. **2 Photos** and **Replies and thread**: add a reply or paste a screenshot (Ctrl+V) so everyone sees the same record. **3 History** lists who did what and when. **Delete this case** is only for a case logged by mistake.

Checks and tips

One complaint, one case. Check the board before creating a new case so the same complaint is not logged twice.

Name the therapist. Each therapist's complaint count in the Sales Hub comes from the cases that name her (month of the visit). Nothing is keyed twice.

Do not leave it waiting. Red-outlined cards and the Overdue tile show cases that have sat too long at a step. The limits are under **Red-flag limits (days)** on the board.

Money goes through Finance. Never promise or pay a refund outside the case: add the refund row and press Send to Finance.

Handlers are automatic. The CS Team Leader, Area Outlet Manager, Head Trainer and GM are set once under  **Roles.** Nobody picks them per case.