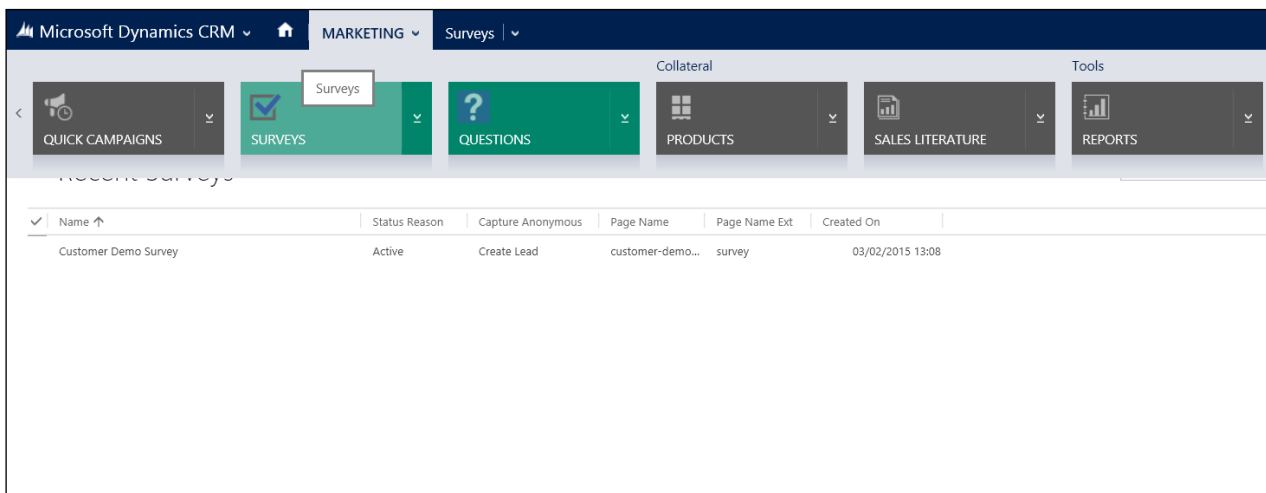


# eSurvey 2013-2015

## eSurvey for Microsoft Dynamics CRM 2013-2015

The latest version of our popular eSurvey solution now supports Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM 2015. Furthermore the solution is now available on subscription as a per user, per month cost with cloud based services included.

eSurvey extends the marketing capability of Microsoft CRM even further. Delivering a fully integrated Survey tool by providing above and beyond functions of standard solutions. eSurvey offers not only surveys for Accounts, Contacts and Leads with CRM, but the ability to create surveys against any custom entity in the system that has related activities.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'MARKETING', and 'Surveys'. Below this, there are several tabs: 'QUICK CAMPAIGNS', 'SURVEYS', 'QUESTIONS', 'PRODUCTS', 'SALES LITERATURE', and 'REPORTS'. The 'SURVEYS' tab is active, displaying a table of surveys. The table has columns for 'Name', 'Status Reason', 'Capture Anonymous', 'Page Name', 'Page Name Ext', and 'Created On'. One survey is listed: 'Customer Demo Survey' with status 'Active', capture type 'Create Lead', page name 'customer-demo...', page name extension 'survey', and creation date '03/02/2015 13:08'.

Name	Status Reason	Capture Anonymous	Page Name	Page Name Ext	Created On
Customer Demo Survey	Active	Create Lead	customer-demo...	survey	03/02/2015 13:08

The opportunity to create anonymous Surveys and Polls is included, along with the ability to capture relevant data to create a Lead or Contact record within CRM.

The anonymous survey ability extends the functionality further. This enables operators to create surveys that can be linked to social media, an example of this would be a product review on Facebook.

By doing this you can post your Survey URL to social networks like LinkedIn, Facebook or even Twitter to capture more responses and new leads, directly into your CRM.

### eSurvey Creation in Microsoft CRM

You can create as many questions and surveys in CRM as you like, and each individual response can be tracked from different sources. So as part of your campaign you may well have a Survey sent out by email, place a link on your Facebook page and include it in several LinkedIn Groups.

#### For Additional Information

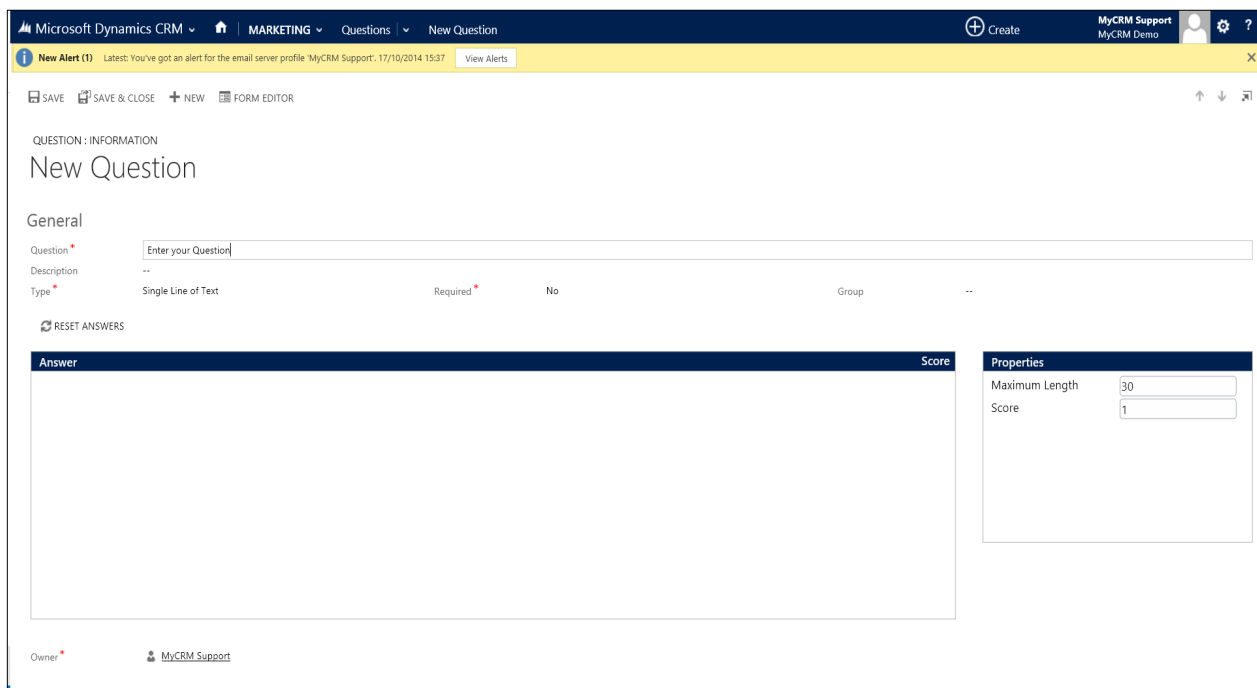
Contact : [Alistair Dickinson](#)  
Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
Phone : [01983 245245](tel:01983 245245)  
Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)

# eSurvey 2013-2015

## Creating a list of questions for one or more Surveys

As part of the eSurvey solution you can create a range of different questions with different answer types. These can be used in one or more surveys and remain separate to the overall survey.

A question can have different answer types including checkboxes, text area's or radio buttons. Each having its own properties that can be set.



Microsoft Dynamics CRM | MARKETING | Questions | New Question | Create | MyCRM Support | MyCRM Demo

New Alert (1) Latest: You've got an alert for the email server profile 'MyCRM Support'. 17/10/2014 15:37 | View Alerts

SAVE | SAVE & CLOSE | NEW | FORM EDITOR

QUESTION : INFORMATION  
New Question

General

Question \*

Description ..

Type \* Single Line of Text Required \* No Group ..

RESET ANSWERS

Answer	Score

Properties

Maximum Length

Score

Owner \* MyCRM Support

## Scoring of Survey Answers.

Each question answer that is created can also be given a value so that an individual completing a survey will obtain a score. This creates the option for using eSurvey for simple tests or creating online quizzes for customers and prospects.

For Additional Information

Contact : [Alistair Dickinson](#)

Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)

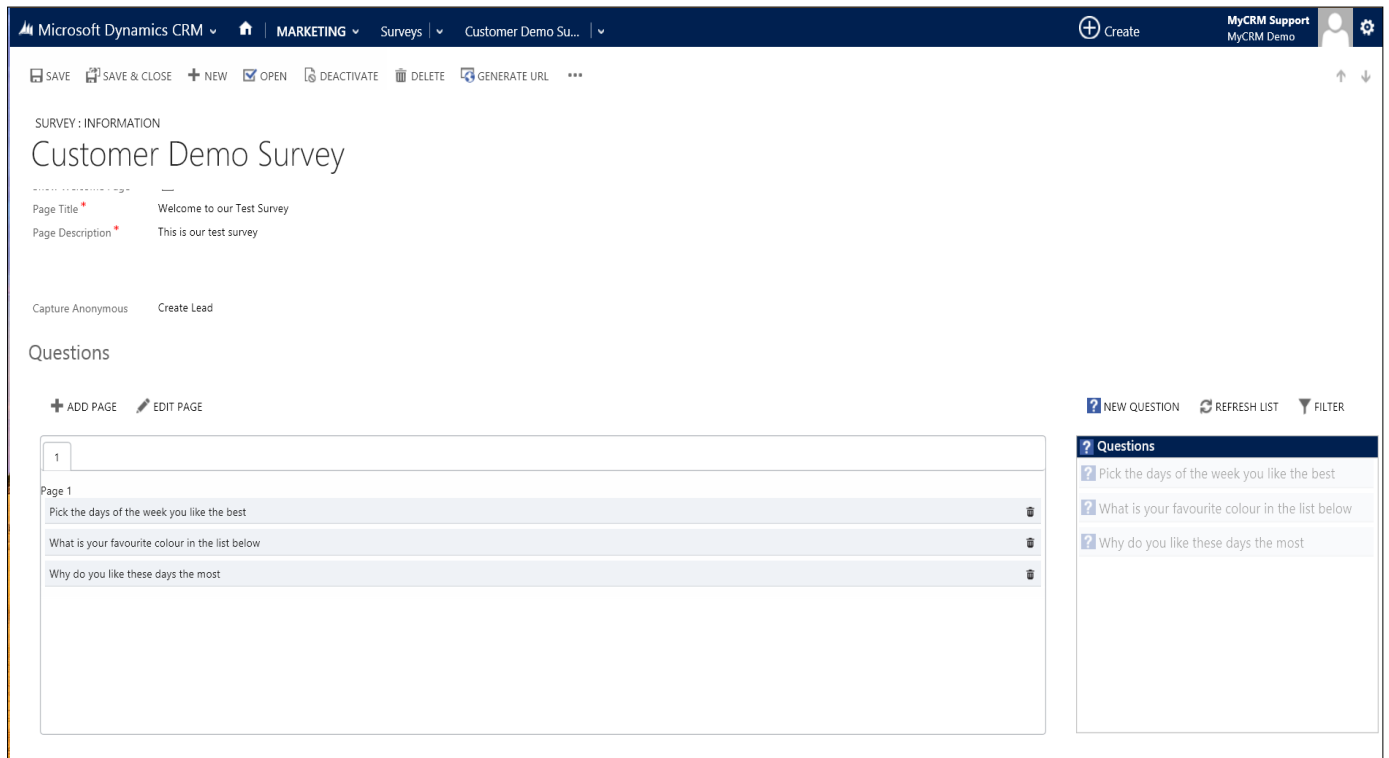
Phone : [01983 245245](tel:01983 245245)

Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)

# eSurvey 2013-2015

## Creating a Survey in Microsoft CRM.

By having integrated surveys in CRM, you can create as many surveys as are required, and reuse questions and answers over and over again.



The screenshot shows the Microsoft Dynamics CRM interface for configuring a survey. The breadcrumb trail is: Microsoft Dynamics CRM > MARKETING > Surveys > Customer Demo Su... The page title is "Customer Demo Survey". Under "SURVEY: INFORMATION", the "Page Title" is "Welcome to our Test Survey" and the "Page Description" is "This is our test survey". There are checkboxes for "Capture Anonymous" and "Create Lead". The "Questions" section shows a list of three questions on "Page 1": "Pick the days of the week you like the best", "What is your favourite colour in the list below", and "Why do you like these days the most". A right-hand panel titled "Questions" contains the same three questions, with options for "NEW QUESTION", "REFRESH LIST", and "FILTER".

Questions can be dragged onto several different survey pages, and all questions that are active are available for each survey.

A survey can have one or more pages of questions with various configurations, to show how the survey is delivered to the end user.

### For Additional Information

Contact : [Alistair Dickinson](#)  
Email : [sales@mycrmgroup.com](mailto:sales@mycrmgroup.com)  
Phone : [01983 245245](tel:01983 245245)  
Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)

# eSurvey 2013-2015

## From an end user point of view on the web

When a survey recipient completes a survey they will be taken to a web page that lists the questions to be answered. Depending how the survey has been set up the questions will be on one or more pages, and the recipient may be requested to enter additional user data.

### Customer Demo Survey

Page 1

**1. Pick the days of the week you like the best**  
Day Selection

Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday  
 Sunday

---

**2. What is your favourite colour in the list below**  
Select a Colour Match

Blue

---

**3. Why do you like these days the most**  
Start and end of the week

Submit

The branding of the survey page can be set along with colour changes to meet your company colours. Each survey is recorded as a survey response activity, with each answer being recorded separately in CRM.

### For Additional Information

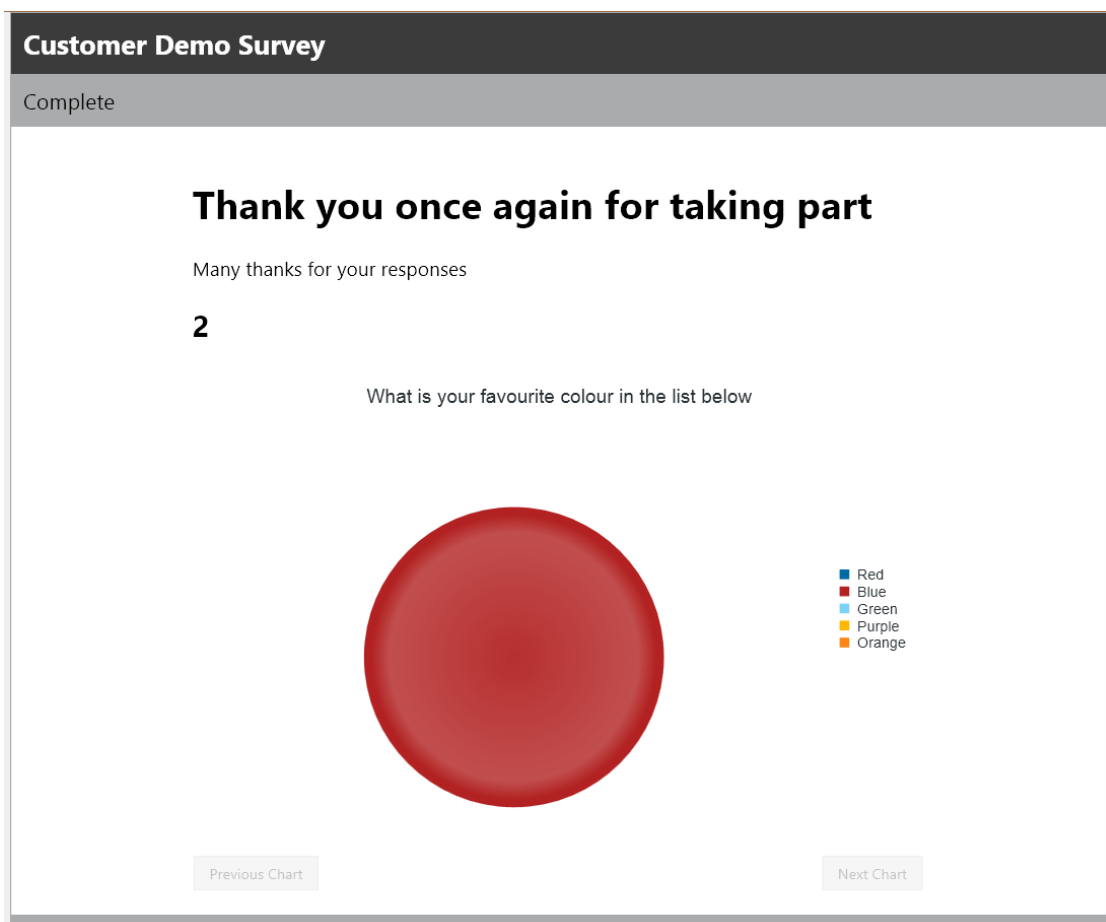
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# eSurvey 2013-2015

## The end user results page.

At the end of the survey a results page is displayed along with any charts, so the end user can see how they have answered questions related to other answers given.

Charts and end blocks of information are fully configurable and optional for end user consumption. An end user can navigate through the charts left to right. If the scoring is added to the answers then the total can also be displayed at the end of the survey.



## For Additional Information

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Phone : [01983 245245](tel:01983 245245)  
Web : [www.mycrmgroup.com](http://www.mycrmgroup.com)