How-to…

Create effective surveys with eSurvey solution

Once fully configured, Microsoft Dynamics CRM is an intuitive yet powerful toolkit that will support your organisation's CRM business methodology. It is extremely flexible and has many advanced features including automation of repetitive or complex processes, ability to integrate with external applications and capacity to enforce business logic.

This document has been produced to help introduce you to some of the functionality that is available when using eSurvey solution with Dynamics CRM 2013/2015.

Should you require further information on specific aspects of the application, there are a number of options available. Please see the last page of this guide for more details.

Contents

Document Overview

The purpose of this document is to give a clear and concise overview of how to work with the MyCRM eSurvey tool set and solution for Microsoft Dynamics CRM 2013/2015.

eSurvey is one of the latest solutions from MyCRM and includes a number of unique features extending the marketing capability even further in Microsoft CRM.

The eSurvey solution incorporates a number of new entities in CRM which record the actual survey, and the questions that are to be used in one or more surveys for customers and / or prospects.

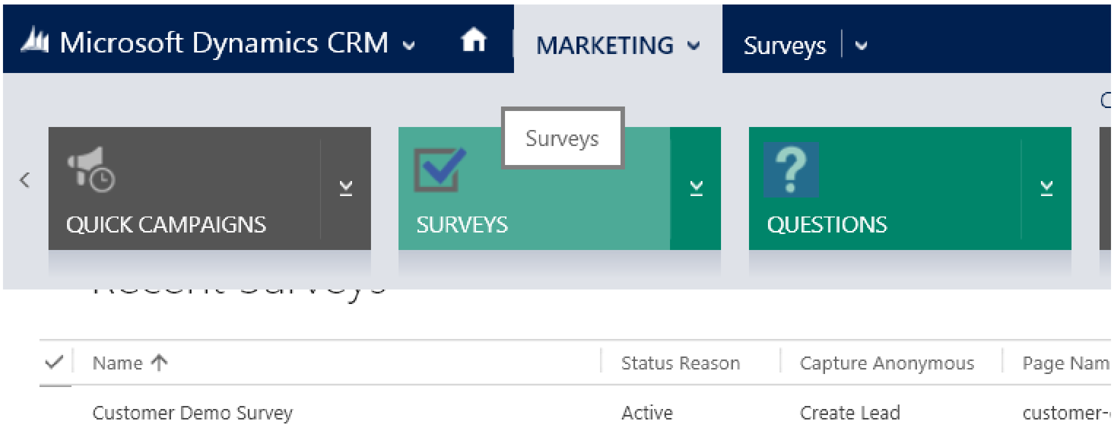
Responses can be recorded against any activity enabled record type including Account, Contact or the Lead records as a “Survey Response” which in turn creates an activity which appears in the closed activities section of CRM on the individual related record.

Included with eSurvey are a number of configurations that can be made to the survey landing page and the results page, to give the right look, feel and experience for when an end user completes the related questions online.

In the first part of this document we look at creating new questions that can be used as part of a survey and review all the different options available.

Creating Survey Questions

From within Microsoft CRM open the Marketing section and navigate to the Questions area on the left navigation.

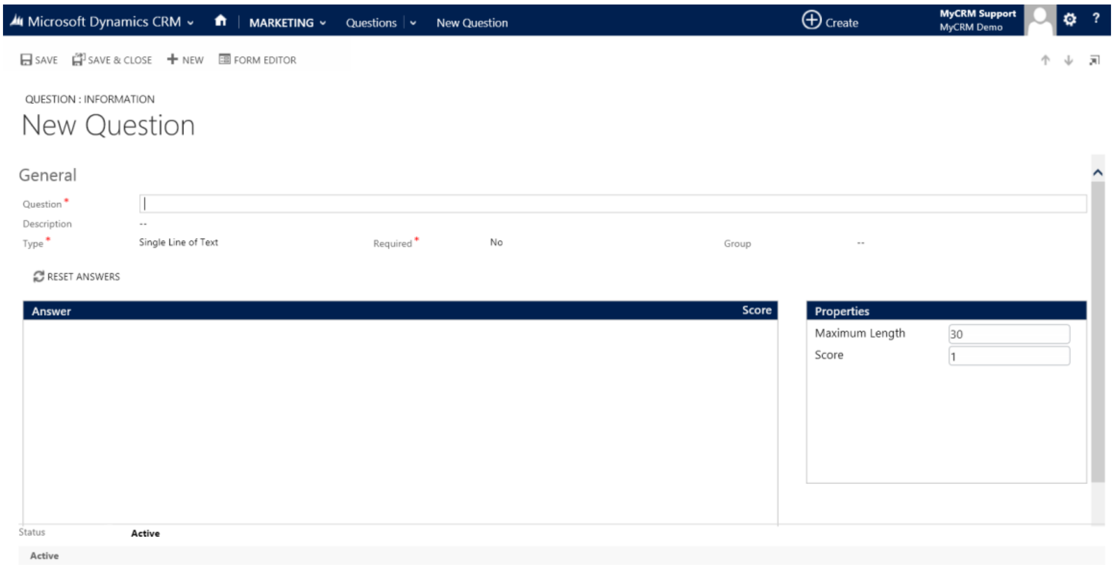


From here you can create new survey questions, it should be noted that questions can be used in one or many surveys, and it is the response to the individual question for the related survey that is recorded.

An example of this may be a quiz question that gets used more than once, over a period of time in many different surveys.

After selecting New from the ribbon, enter your question.

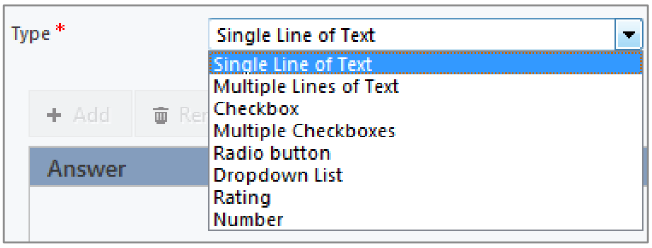
An example of the new Question record is below and is explained in further detail as a Question can have many different types of answer formats.



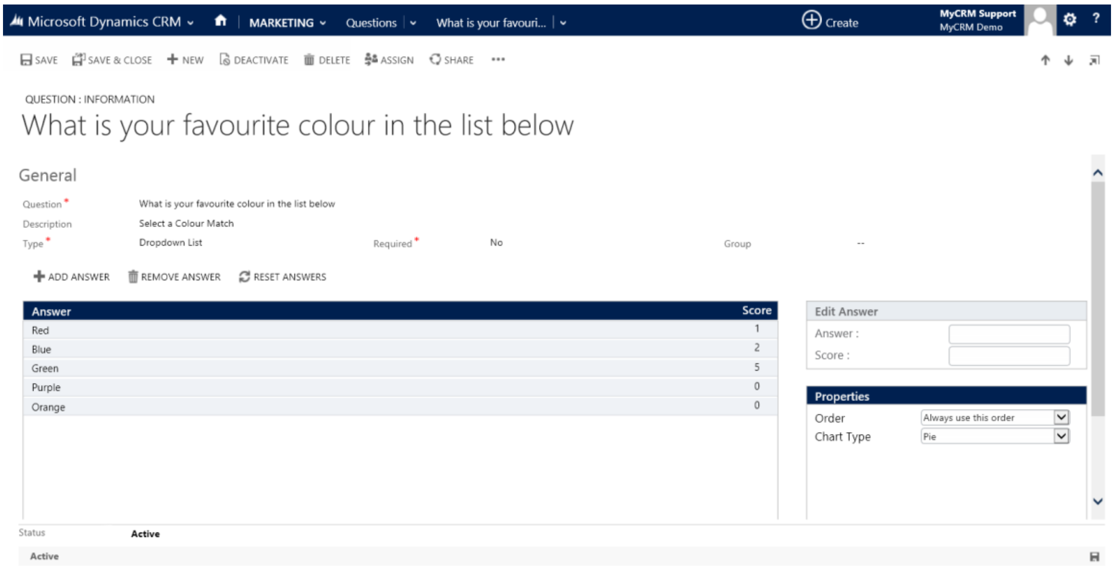
The text for the question is entered in the question box, and this is the narrative that you are asking the individual recipient of the Survey request.

Optionally a description can also be added and this will be displayed under the Question to give additional narrative.

The type of response can be 1 of 8 different types and these are

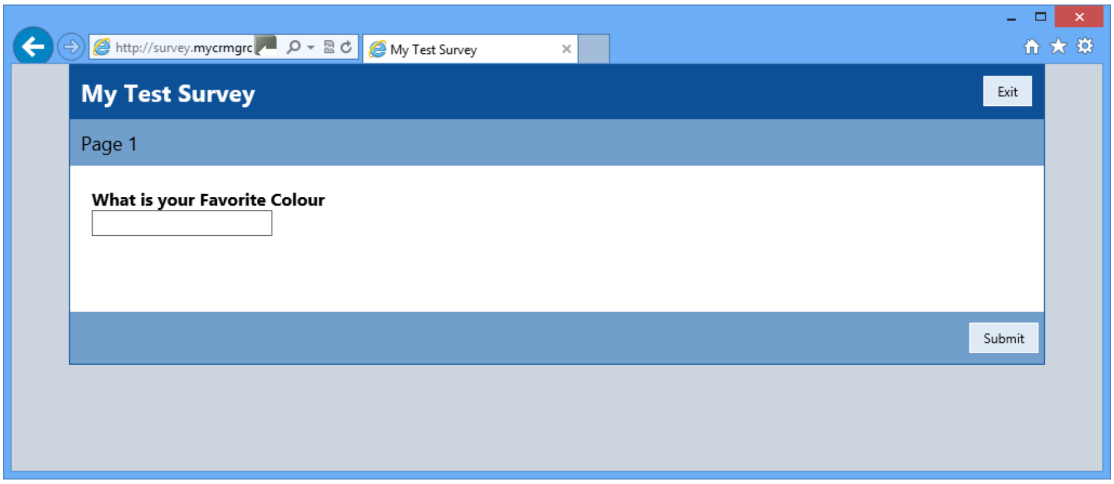


By selecting the "**Single Line of Text**" option an end recipient, will have the option to enter a typed response to the question being asked.

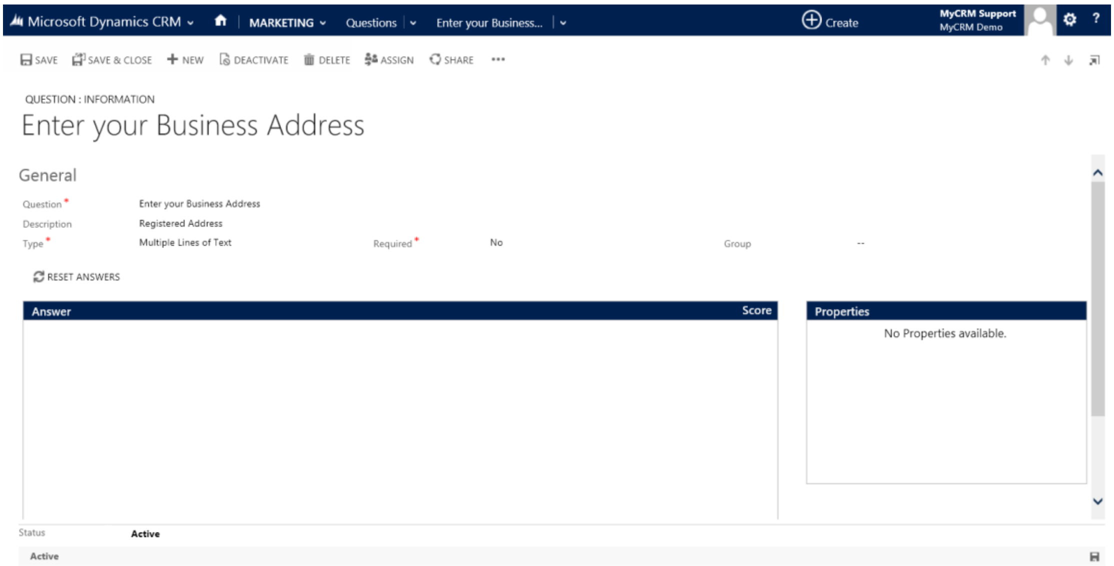


The score can also be set for this question if being used and the length of the text that is to be recorded can also be set. The score will be set if the question is answered, and not the validity of the typed answer.

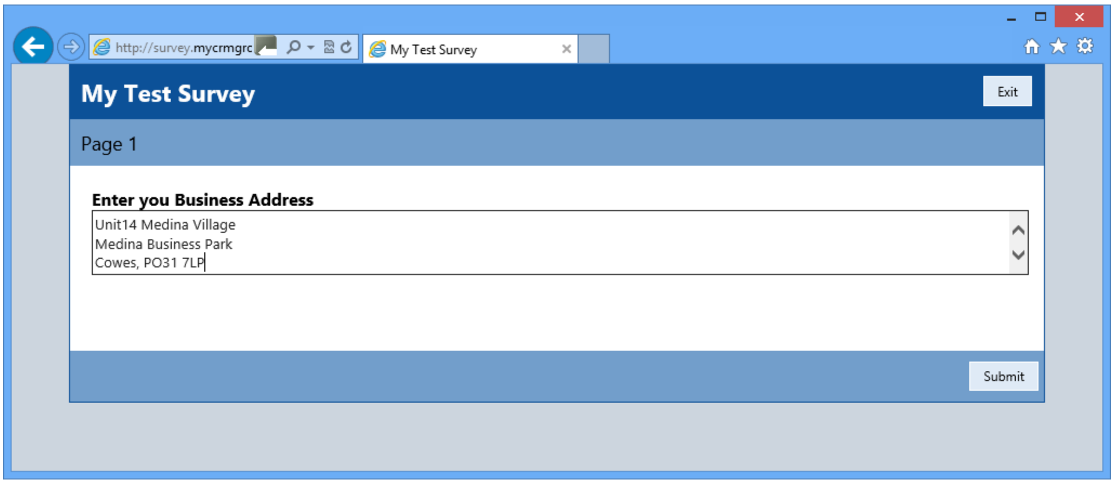
This question type is then displayed on the survey as



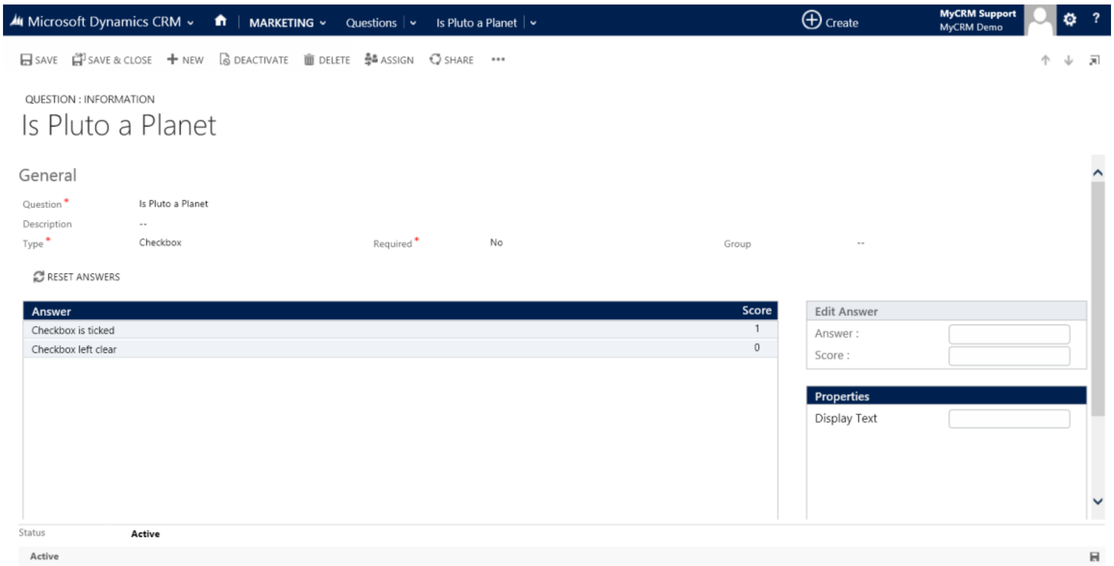
By Selecting the “**Multiple Lines of Text**” option an end recipient will have the option to record multiple lines of text; an example of this may be recording some notes or an address. This type of text field is a memo field and can contain up to 2000 characters.



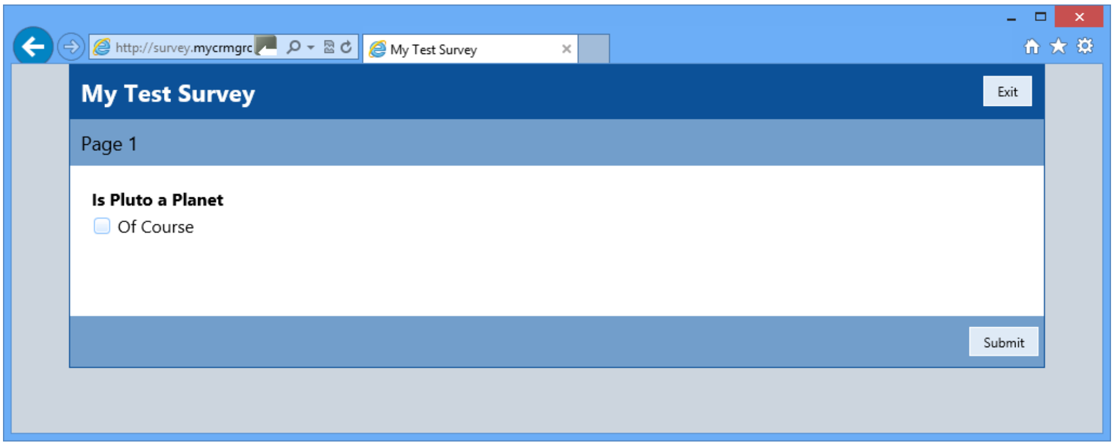
This question type is then displayed on the survey as



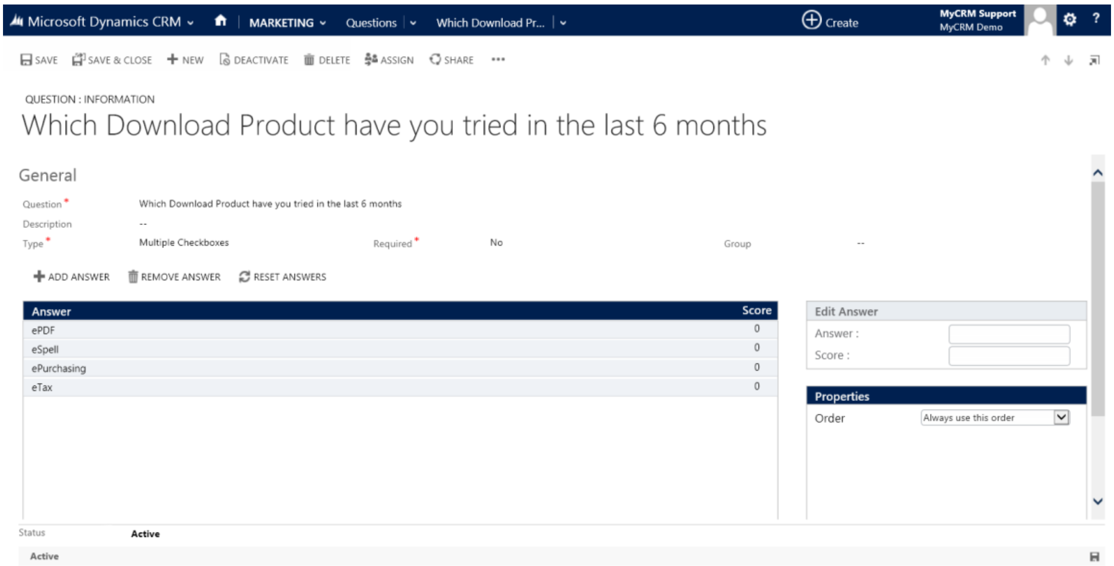
By Selecting the "**Checkbox**" option an end recipient will have the option of ticking a single box, this is a great option if you want to ask questions for validation i.e. 'Would you would like to hear from one of our customer service team?'



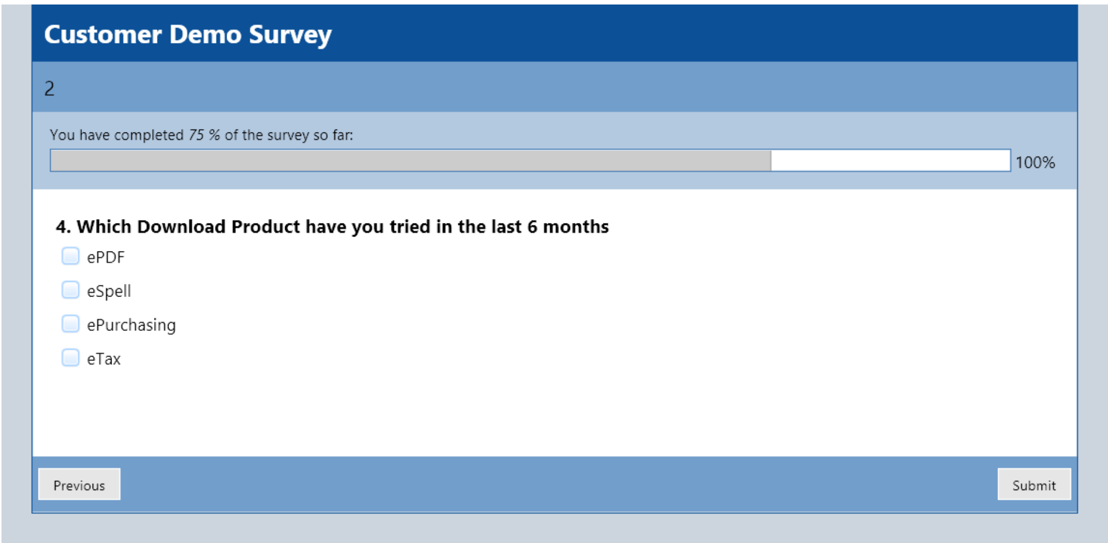
This question type is then displayed on the survey as



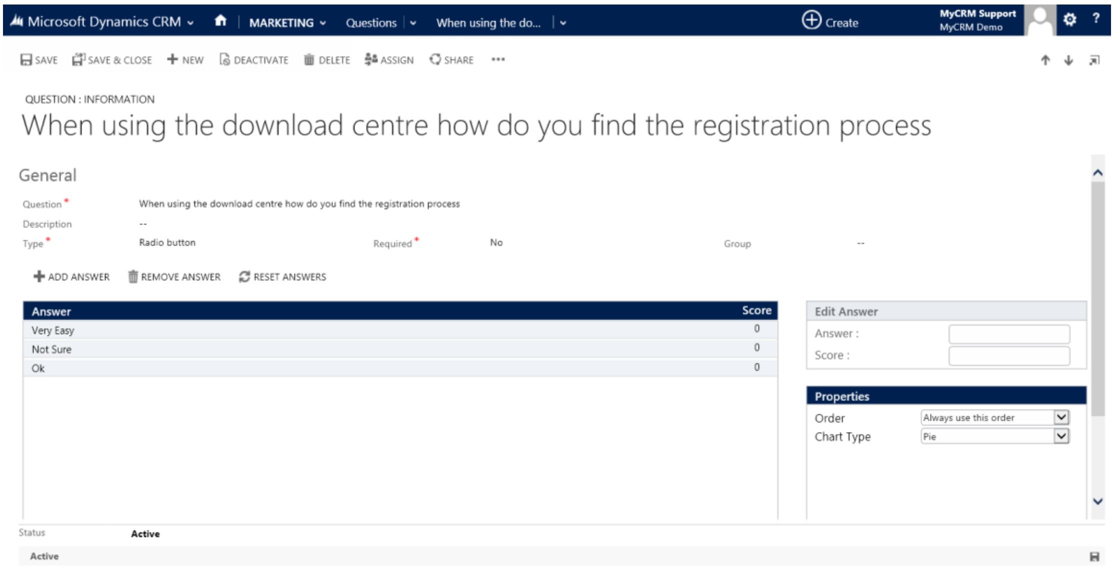
By selecting the “**Multiple Checkboxes**” option a question can be crafted to have multiple responses.



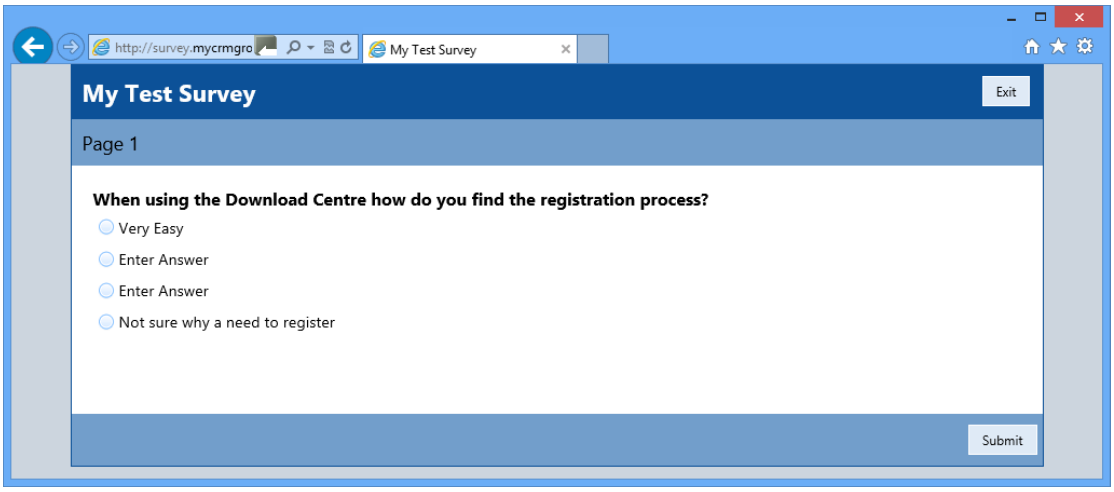
This question type is then displayed on the survey as



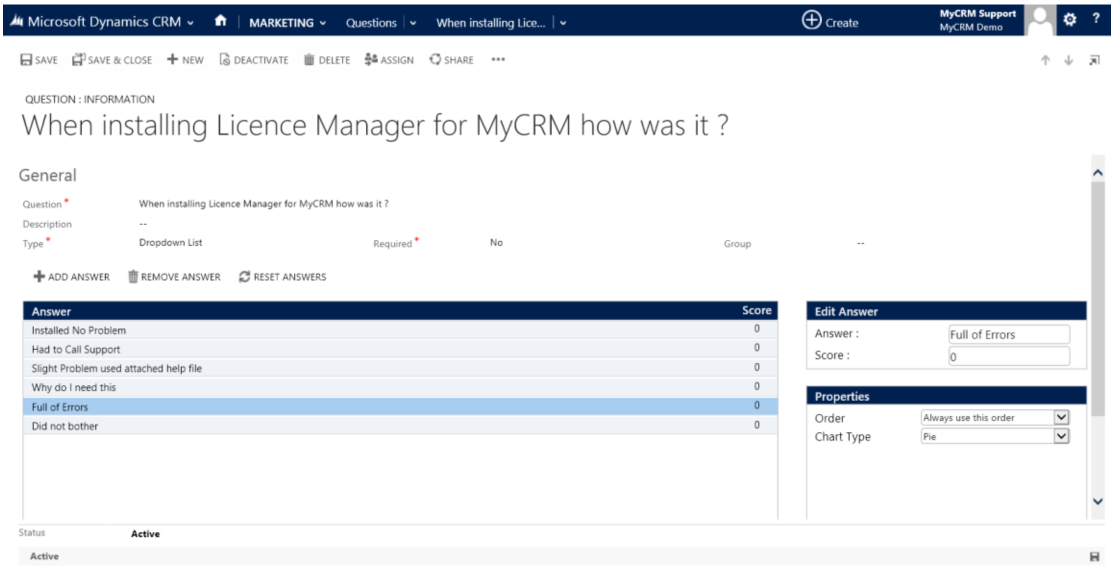
By selecting the “**Radio Button**” option a question can be asked with multiple answers, but only one of the answers is selectable.



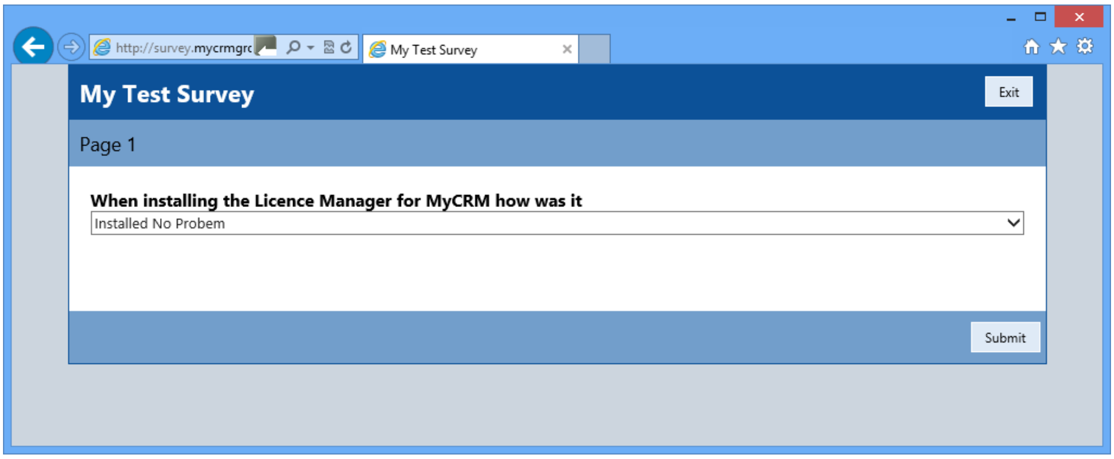
This question type is then displayed on the survey as



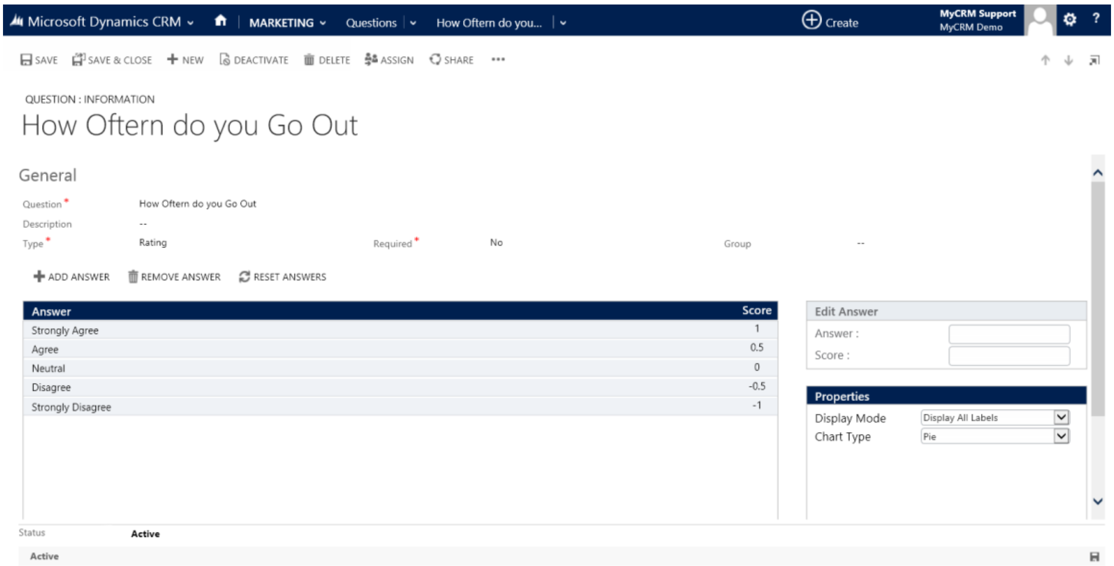
By selecting the "**Dropdown List**" option a question can have one or more answers, but only one answer can be selected in response to the question.



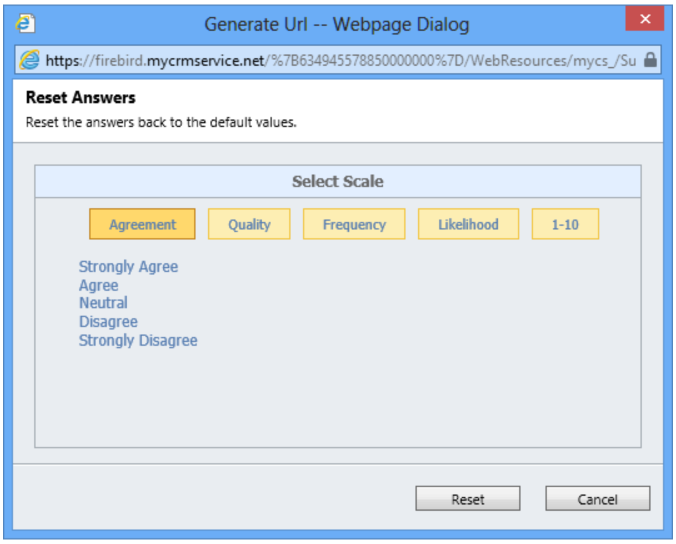
This question type is then displayed on the survey as



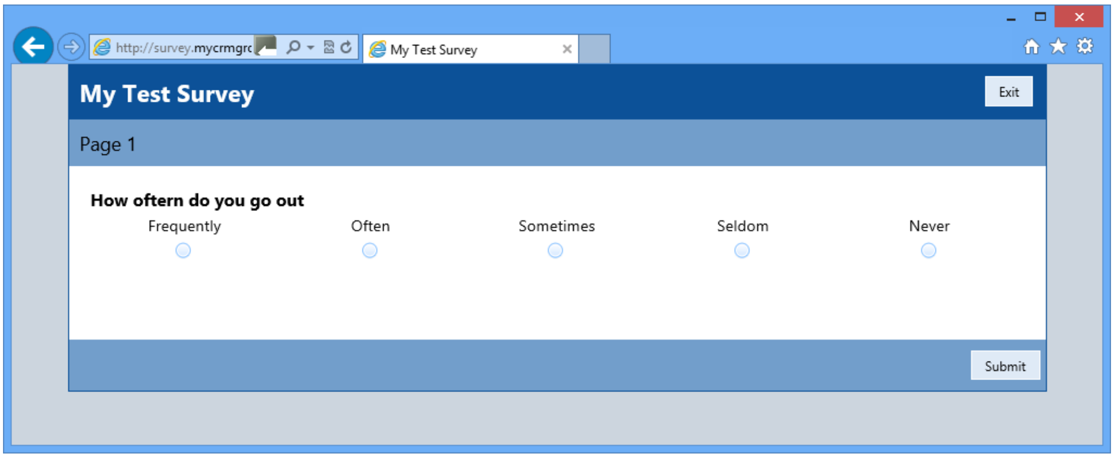
By selecting the "**Rating**" option you can give a question a value and allow an end recipient to select a rate between 0 and n.



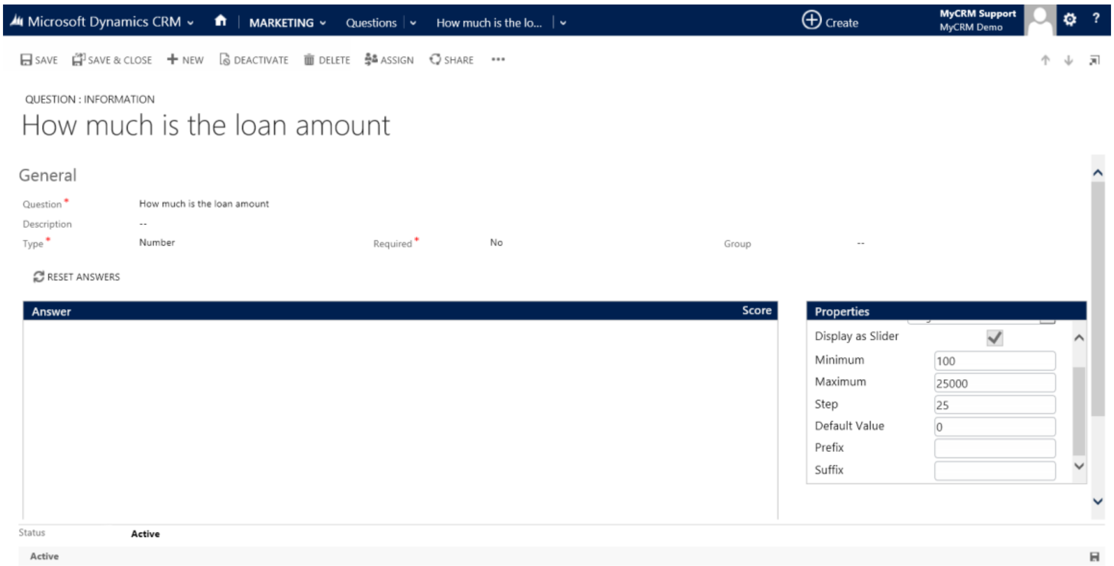
This question type has a number of default settings, these can be set by using the reset button on the main ribbon of the survey, but bespoke answers can also be configured.



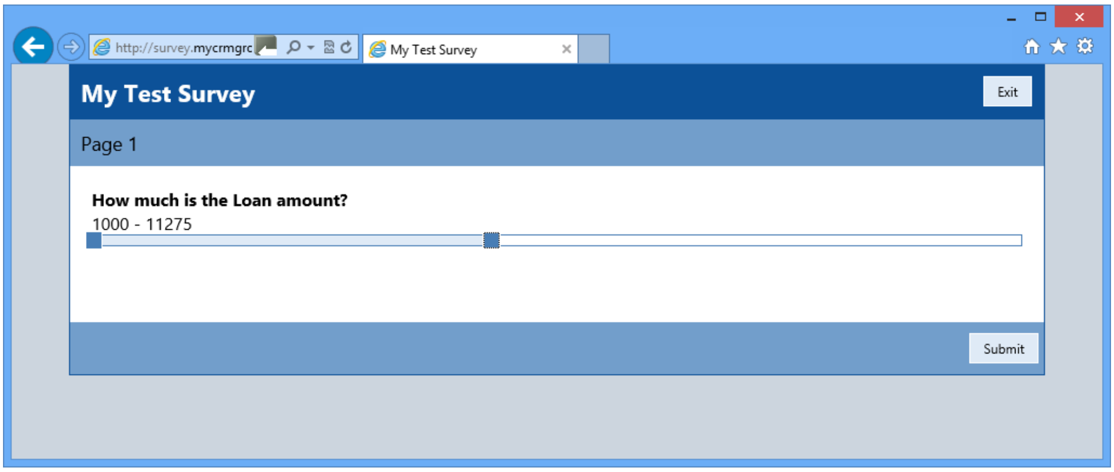
This question type is then displayed on the survey as


http://survey.mycrmgrc
My Test Survey
My Test Survey
Exit
Page 1
How oftern do you go out
Frequently
Often
Sometimes
Seldom
Never
Submit

By Selecting the "**Number**" option, this enables a pre-formatted number field to be selected for the question being asked, this can then be displayed as a slider.



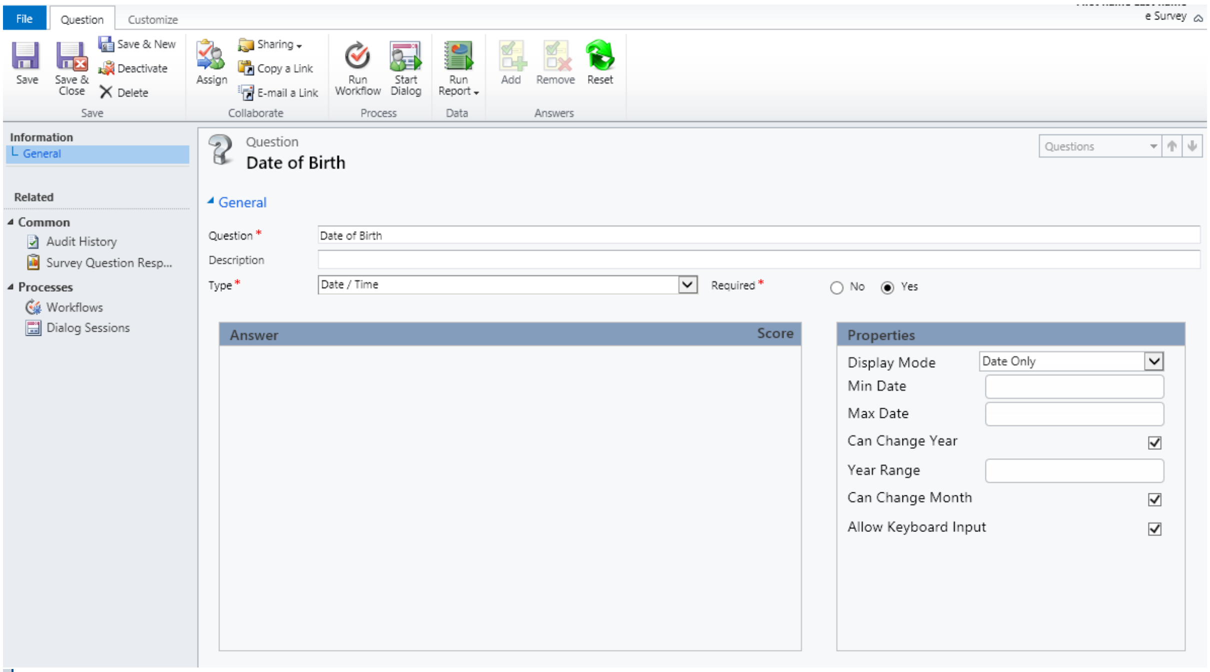
This question type is then displayed on the survey as

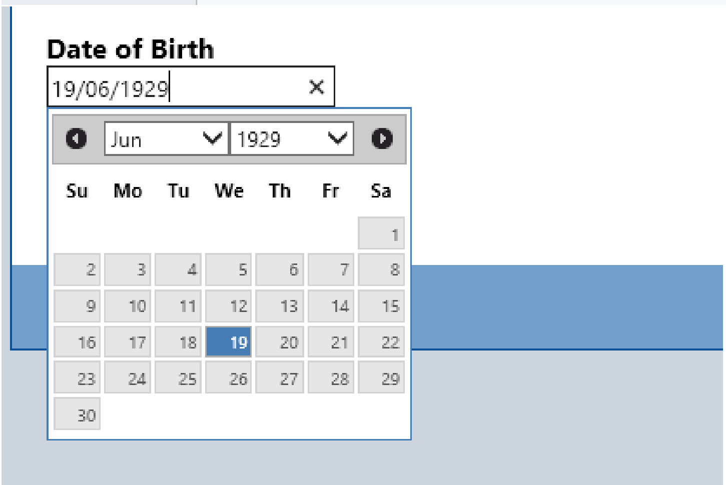


When creating questions to be used there is also the option to make the question required, i.e. must be completed by the end recipient.

New Question Type: Date/Time

A new Question Type has been added to eSurvey to accommodate the capture of Date / Time information.


File
Question
Customize
Save
Save & Close
Save & New
Deactivate
Delete
Assign
Sharing
Copy a Link
E-mail a Link
Run Workflow
Start Dialog
Run Report
Add
Remove
Reset
Save
Collaborate
Process
Data
Answers
e Survey
Information
General
Related
Common
Audit History
Survey Question Resp...
Processes
Workflows
Dialog Sessions
Question
Date of Birth
Questions
General
Question *
Date of Birth
Description
Type *
Date / Time
Required *
No
Yes
Answer
Score
Properties
Display Mode
Date Only
Min Date
Max Date
Can Change Year
Year Range
Can Change Month
Allow Keyboard Input


Date of Birth
19/06/1929
Jun
1929
Su Mo Tu We Th Fr Sa
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30

The Properties for the Date Question type can be used to control the date picker and validation settings on the Survey.

Display Mode : Use to determine what information is collected from the Question.

- **Date Only –** Capture only Date information.
- **Time Only –** Capture only Time information.
- **Date and Time –** Capture both Date and Time Information.

When Display Mode is in **Date Only** or **Date and Time** the result is saved into CRM as a Date/Time field.

Min Date : Select a date here that will be used as the Minimum Date that the user can select from. Leaving it blank will allow any date to be selected.

Max Date : Select a date here that will be used as the Maximum Date that the use can select from. Leaving it blank will allow any date to be selected.

Can Change Year : Selecting this checkbox renders a drop down box on the date picker control to allow you to directly jump to a selected year. If this checkbox is left clear, you would need to select click through the months to change the year. The “years” available for selection can be determined from the **Min Date** or **Max Date** properties and the Year Range property. If those are all left blank then it will by default load the previous 10 years and next 10 years of the currently selected year.

Year Range : This is only available if the **Can Change Year** option is selected and will set the “years” that will be loaded into the drop down box. This should be entered in the format of **year:year**, so **1970:2013** will load the years from and including 1970 up to and including 2013. If you have entered a **Min Date** or **Max Date** then the **Year Range** will not be used.

Can Change Month : Selecting the checkbox renders a drop down box on the date picker control to allow you to directly jump to the desired month. If the **Min Date** or

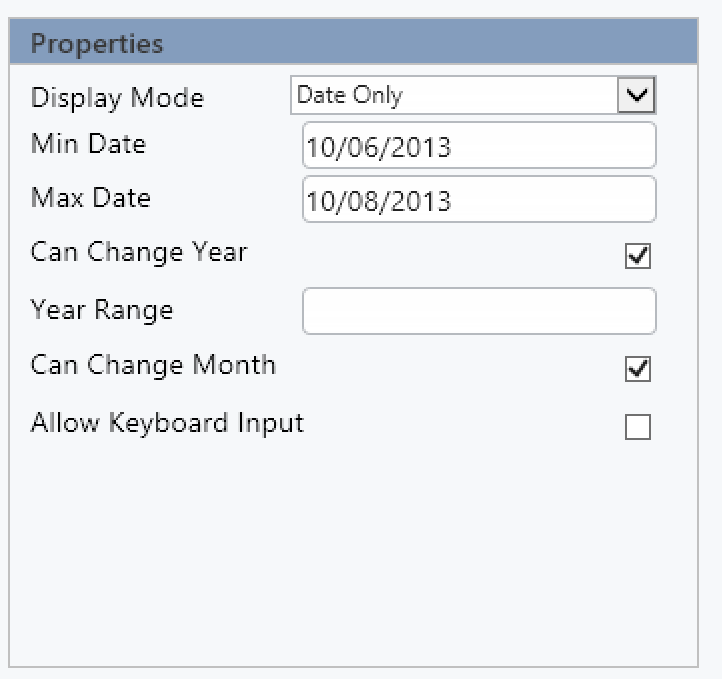
Max Date properties are set to a range that excludes some months, only the available months are shown.

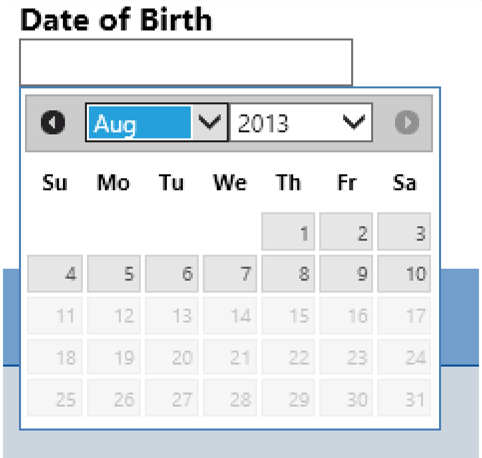
Allow Keyboard Input : Selecting this checkbox allows the user to type in the date. If the checkbox is left clear then they will only be able to set the date using the date picker.

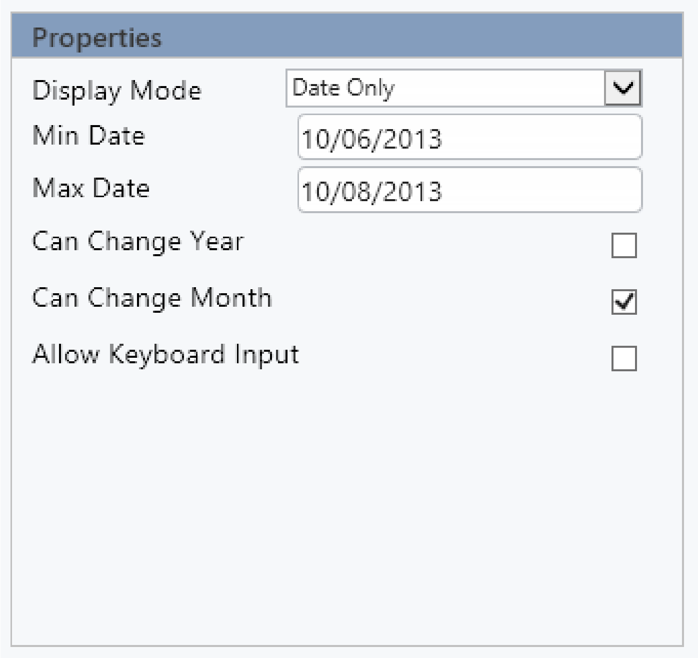
Time Format : Allows you to select the format that the time is displayed in on the datepicker. This can either be 12 Hour or 24 Hour.

Time Display Mode : You can either choose the time using slider controls or drop down lists with the available times in.

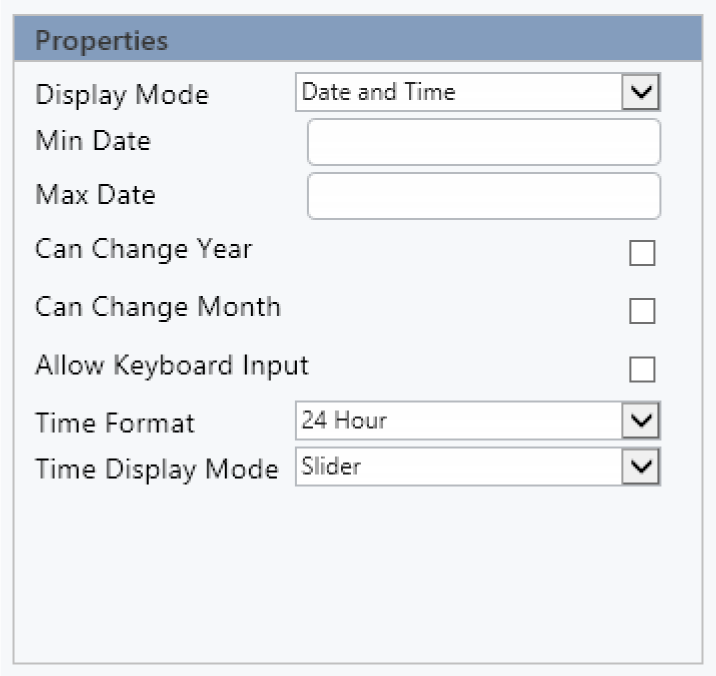
Below are some examples of the Properties and how the date picker is rendered.

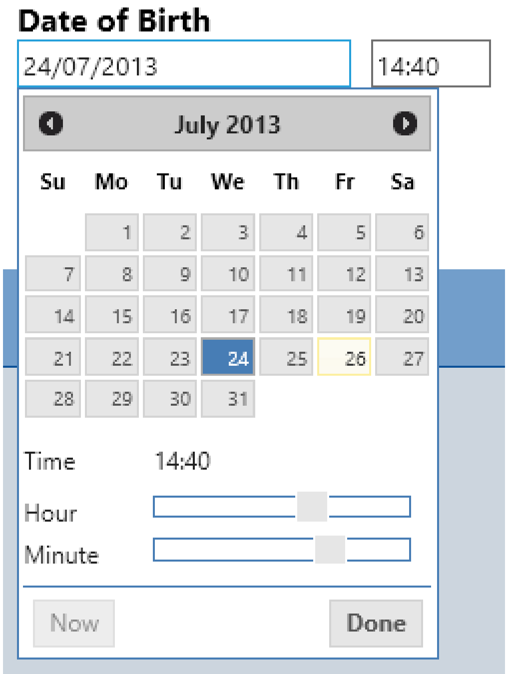


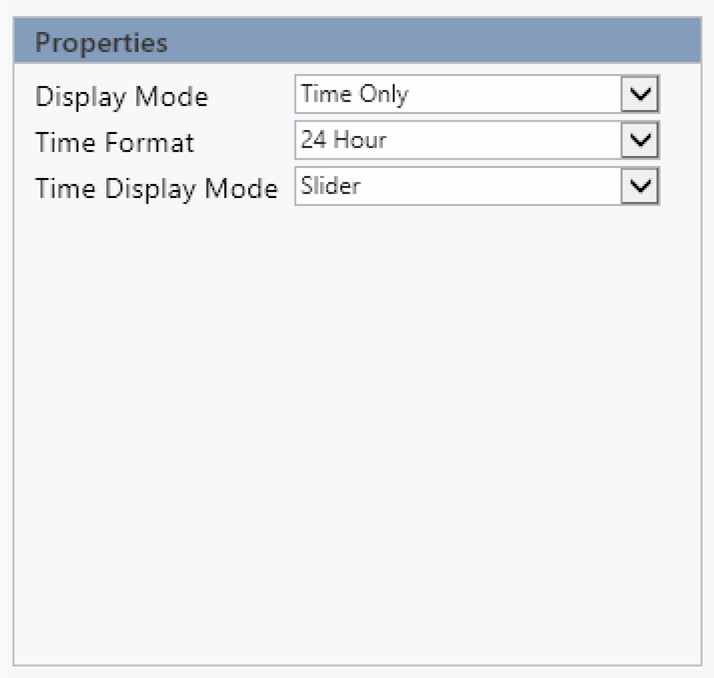


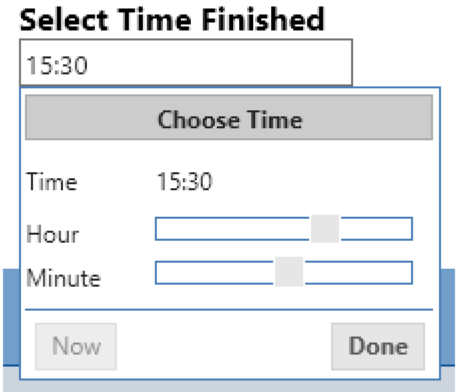

Properties
Display Mode
Date Only
Min Date
10/06/2013
Max Date
10/08/2013
Can Change Year
Can Change Month
Allow Keyboard Input


Date of Birth
Jun
Jul
Aug
2013
Su Mo Th Fr Sa
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30


Properties
Display Mode
Date and Time
Min Date
Max Date
Can Change Year
Can Change Month
Allow Keyboard Input
Time Format
24 Hour
Time Display Mode
Slider


Date of Birth
24/07/2013
14:40
July 2013
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31
Time 14:40
Hour
Minute
Now
Done


Properties
Display Mode
Time Only
Time Format
24 Hour
Time Display Mode
Slider


Select Time Finished
15:30
Choose Time
Time
15:30
Hour
Minute
Now
Done

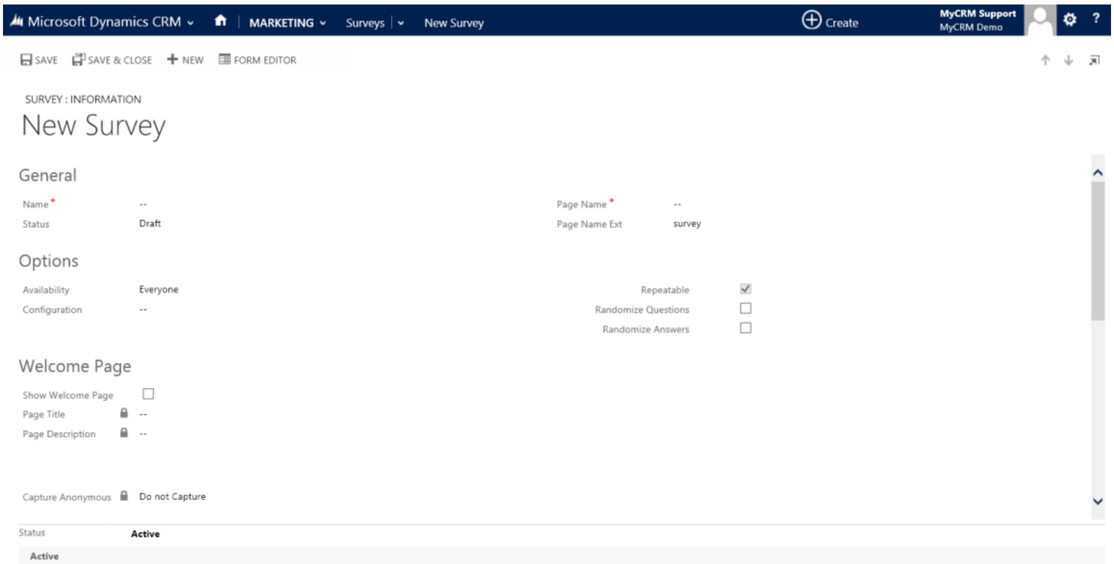
Creating a Survey

In this section we cover creating the actual survey directly in CRM, and selecting the questions that are to be asked as part of the survey campaign / or single survey request.

eSurvey in CRM can be used in many different ways from running a customer service survey, competitions, polls or even scored tests.

To get started select the Survey section under Marketing in CRM, and select the new icon from the main ribbon.

This will open a new blank Survey.



Below we cover the different sections on how the page should be populated with survey data.

General

Under the general section, populate the name of the survey as this will generate the automatic page name. Set the status of the Survey to draft, and select what type of survey this is going to be with the options of Survey, Poll and quiz found in the Page Name Extension.

Options

Under the options section is the ability to set the availability of the survey, and these options can be set so the survey is invitation only, or available to everyone.

The survey also has the ability to create a configuration page, which can be selected when setting the survey up (Configuration pages are covered later in this document).

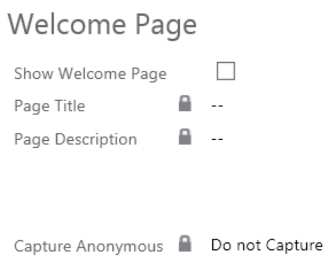
There are also additional options to set the survey as repeatable, meaning an individual can take it more than once. Also you have the option to randomise the sequence in which the questions and answers will appear for each question block.

Welcome Page

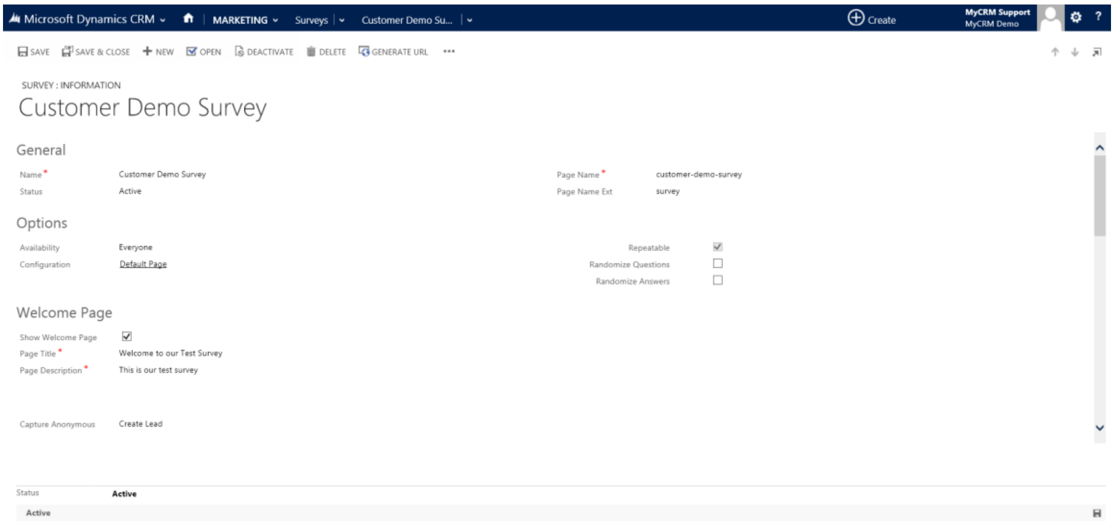
In this section there is the option to show a welcome page which may have relevant information about the survey detailing its purpose. If you select to show the welcome page, the details in the Page Title field and the Page Description field will be shown at the start of the Survey.

Also as part of the welcome page settings, there are 3 options to set the way information from the survey is captured. These are Do Not Capture (Meaning the survey will be answered anonymously and will be related to an anonymous contact in CRM), or there is the option to create a lead or contract for individuals answering the survey.

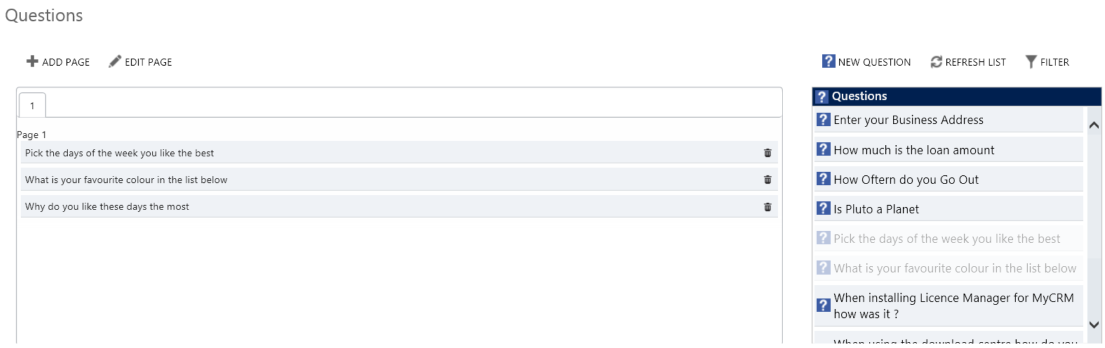
If the survey is invite only then the Capture Anonymous is removed as an option and greyed out.



Once the above has been completed with the relevant information the survey should be saved, once saved, proceed to add questions to the survey.



After saving the survey for the first time the available questions will appear at the bottom of the screen. Then using the drag and drop interface, questions can be added to the survey.



With a survey there is the option to have one or more pages of questions that can be asked, and you can see from the example above two pages have been used.

It is possible to have up to 10 pages and these can be added via the tools on the main ribbon, but it should be noted very long surveys can put people off, unless they are aware of the extent and duration required for completion.

To add extra question pages use the buttons on the ribbons under the pages section.

Questions can also be created directly from the open survey page, by using the buttons on the ribbon.

Thank You Page

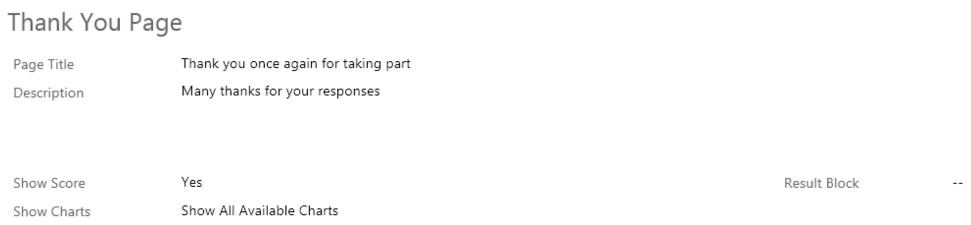
Just like the welcome page there are options to create a Thank You Page which will be displayed once the survey is completed by a recipient.

In this section information can be added like a Page Title and Page Description which is displayed to the end recipient along with some additional settings.

The show score option can either be switched on or off, and this will display to the end recipient the result they got, this is especially useful when running quizzes with eSurvey.

Result blocks are covered in more detail later in the document, but various result blocks can be created to show relevant information based on the value of a score.

Finally in this section there is the option to display all or random result charts that have been created for individual questions. This will show the results so far for the survey, again this is a useful tool when running polls with a single question.



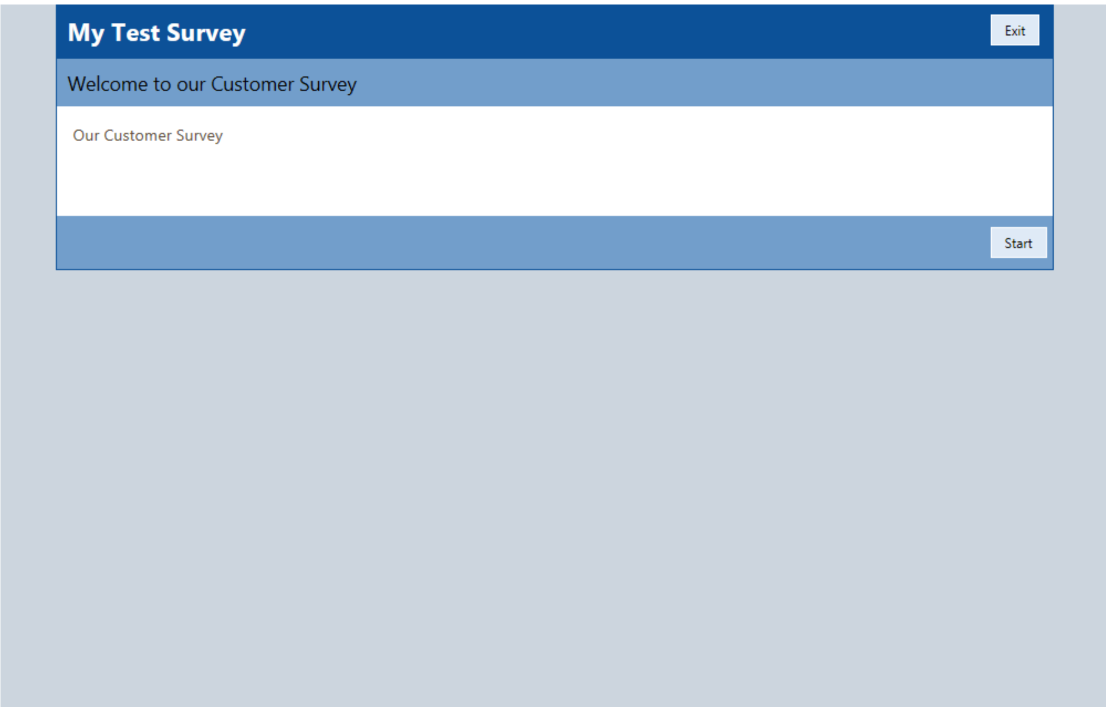
Other options exist to allow the switching of the charts.

Testing Your Survey

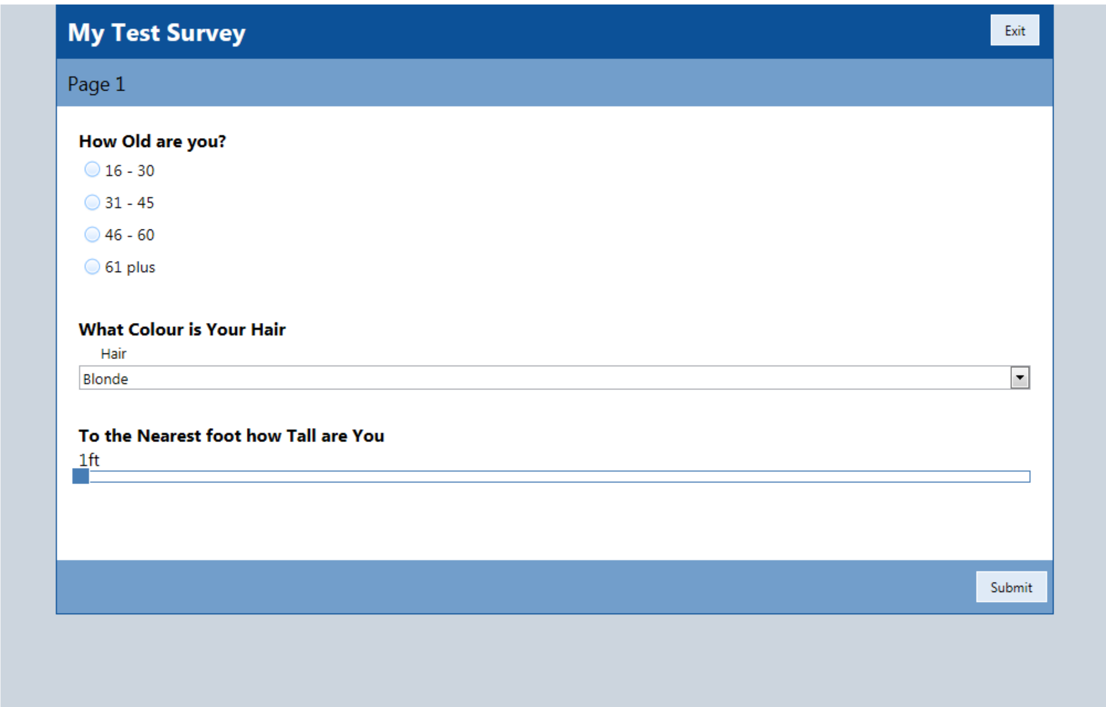
Once all the data and questions have been added to the survey, the survey can be saved and then tested.

From the Survey ribbon select the Open button; this will open the survey as the end user will see it, in a web browser. Note leave the Survey as Draft until you are ready to release this for public use.

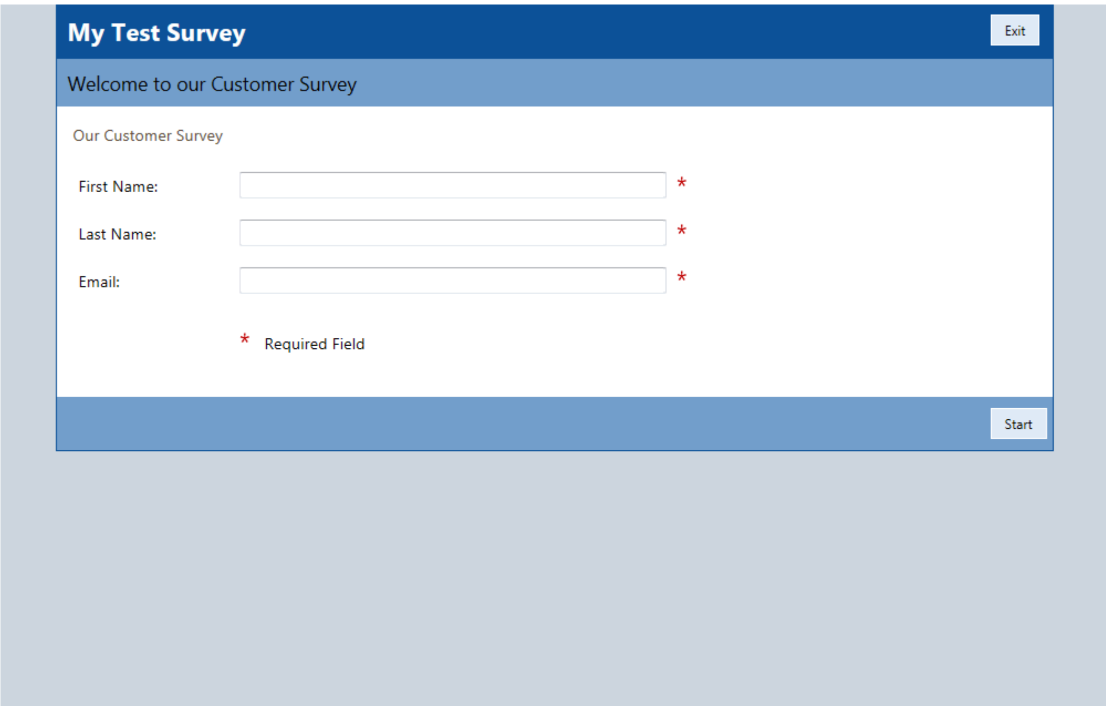
Depending on the configuration page used, and if the welcome page is active the following will be displayed.



If there is no Welcome page then the first page loaded will be the first page of Questions for the survey.

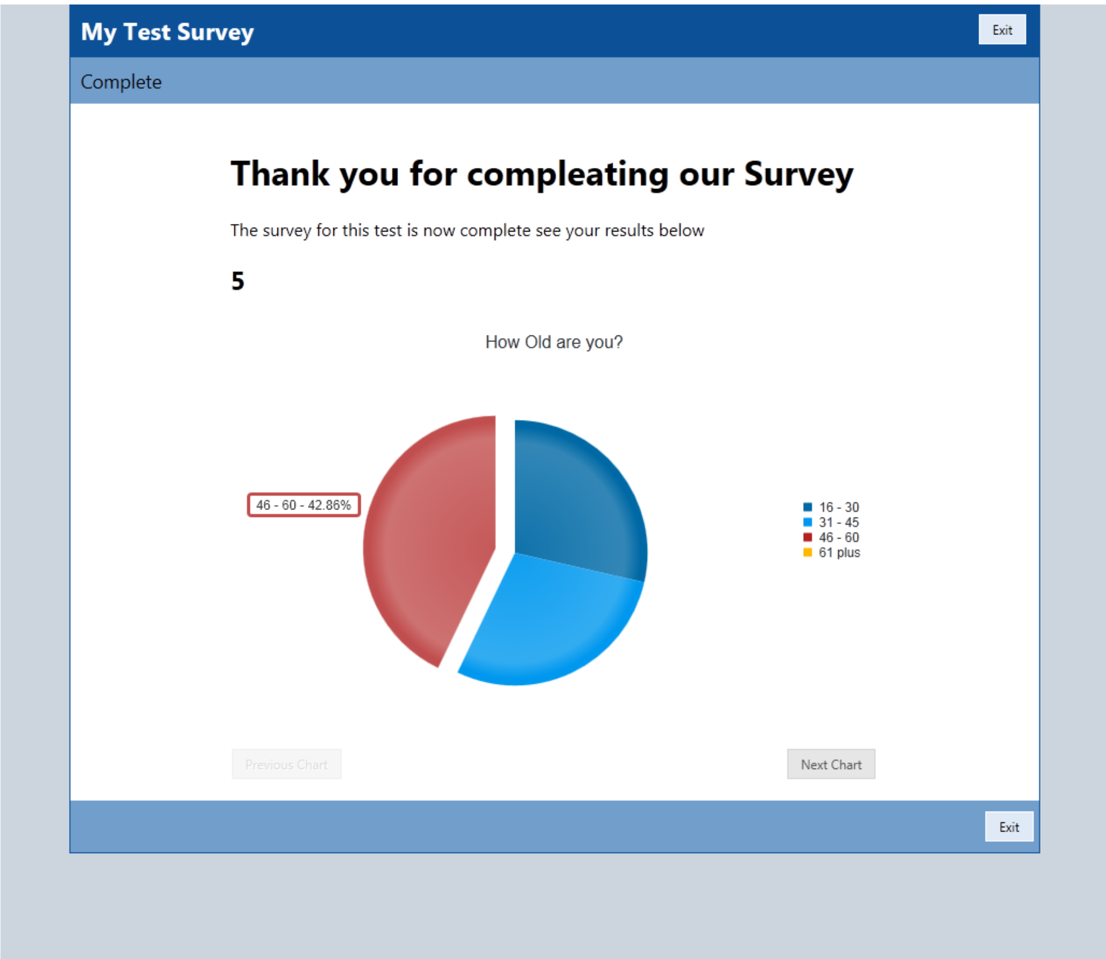


If the survey has been set to capture either lead or contact details, then the first interaction will require the completion of personal information.



Using the open button to run the survey means you can complete a test of the survey and follow the process through to completion, answering each survey question in turn.

On completion the results will be displayed along with any charts that have been selected for display.



Sending out your Survey.

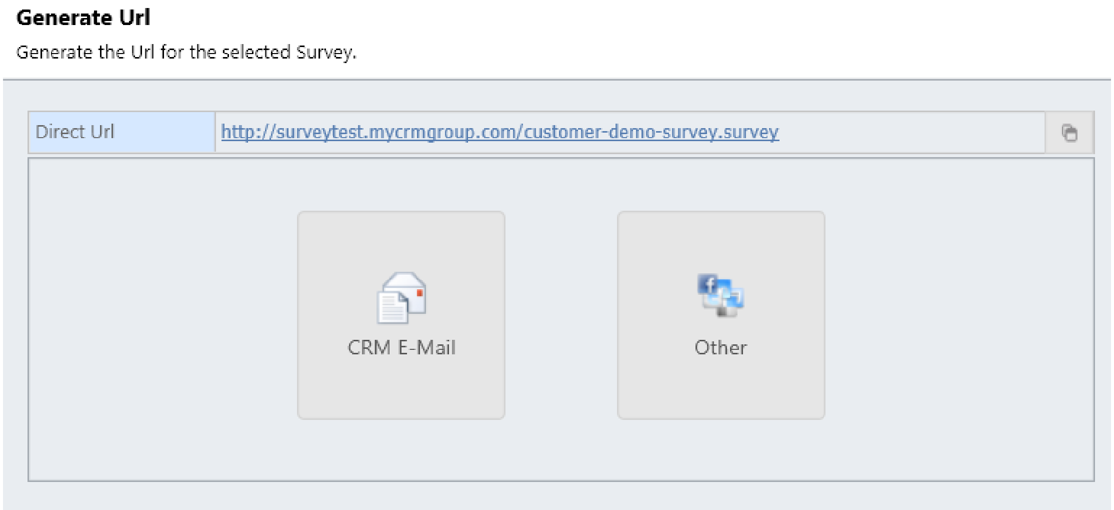
The eSurvey solution extends the CRM platform and enables the sending of a survey to records with an email address in CRM.

In this section we look at the different ways that surveys can be sent.

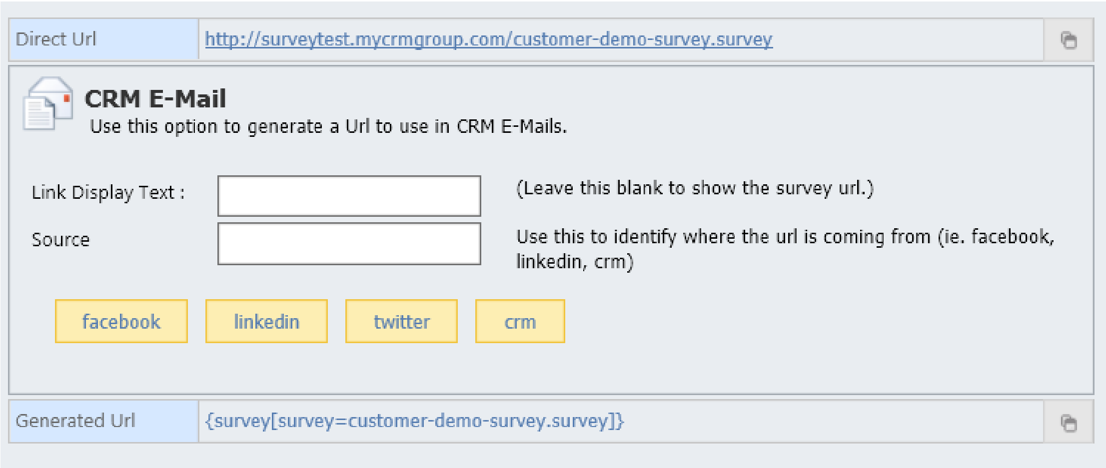
Sending a single survey request

The easiest way to send an email from CRM with a Survey link is to use the generate URL option from the survey screen, this can be found on the main CRM ribbon.

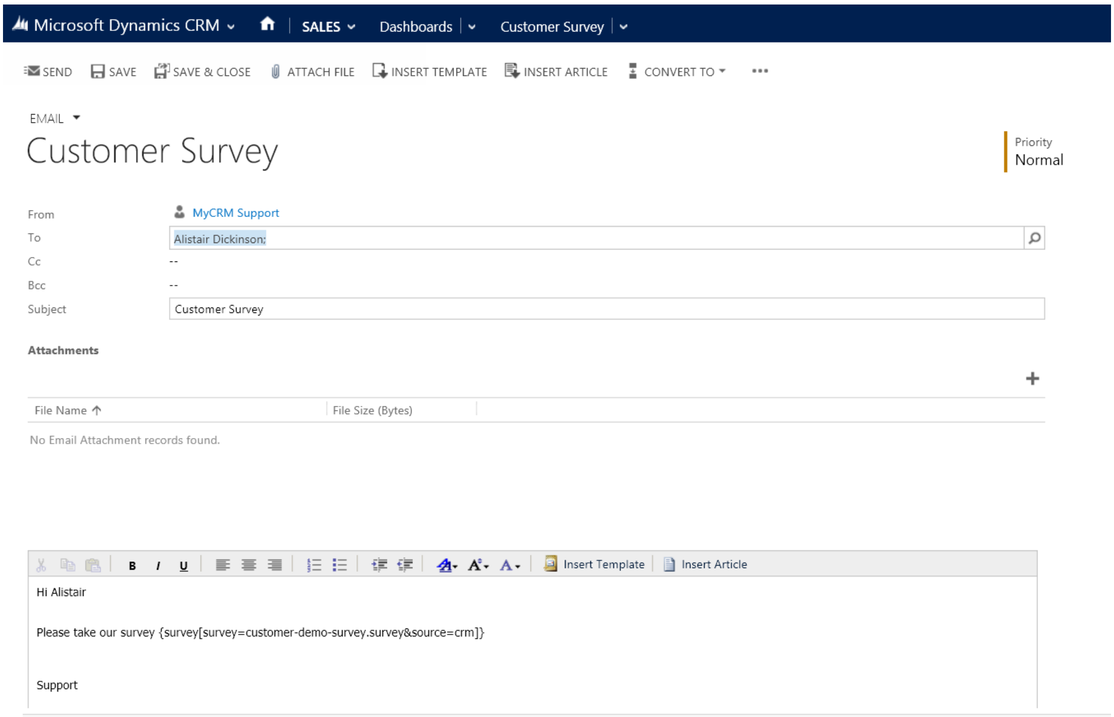
By selecting the generate URL button the following option screen will be displayed



Select the CRM E-mail option, populate the text fields on the screen and then right click and copy the Generated URL for this Survey.

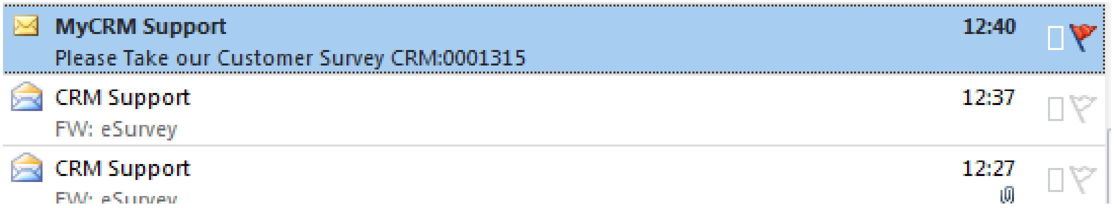


By selecting the copy option you can then create a new email activity in CRM and paste the URL for the survey directly into the body of the email message. When you send or save the email activity the URL is reformatted to a link in the email that end recipients can open.

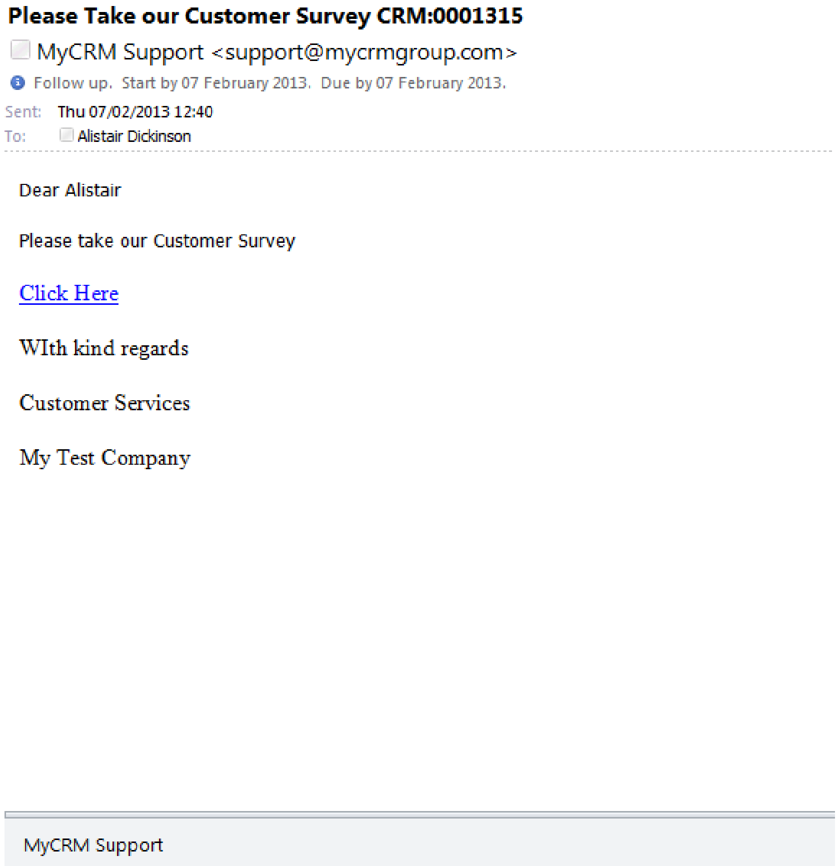


Note; upon sending the email the URL text is transformed into a link using the text entered into the link generator screen above.

The email will arrive in the email client as a standard email.



And when displayed is a window or reading pane will be shown as follows.



Once a recipient receives an email they will be able to click the embedded link and complete the survey in full, recording related responses directly in CRM.

Sending a Survey by Quick Campaign

As the eSurvey solution extends Microsoft Dynamics CRM, this means a survey request can be sent by email. Quick campaigns is one of the standard features that can be used to create bulk email to be sent from CRM.

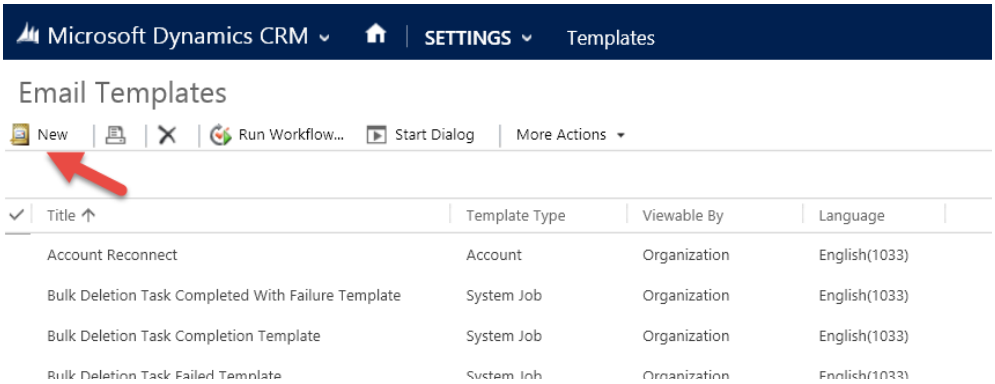
In this section we look at using eSurvey with Quick Campaign to load a template, to be used when sending an email with a survey request to more than one person.

With all solutions from MyCRM we endeavour to extend capability and make use of existing standard functions within CRM, in this example we use Templates and the standard Quick campaign function.

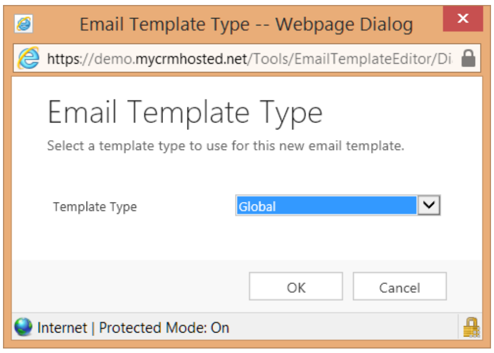
Create a Template

The first step is to create a new email template in CRM, this can be done by following the steps below.

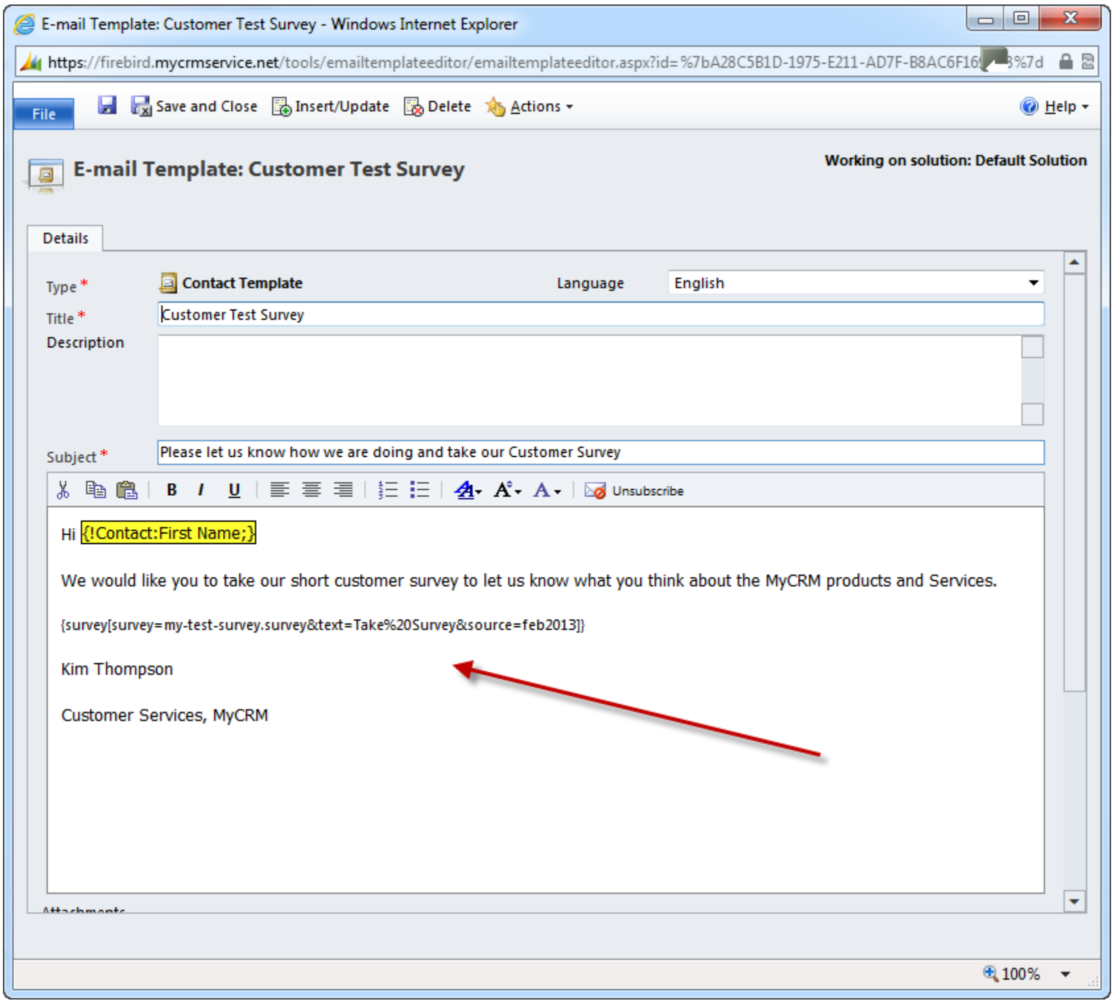
In CRM open your personal options and navigate to email templates, create a new template for the selected entity type or as a global template. It should be noted that if the email template is not going to be re-used for future campaigns that the information for the template can be created as part of the Quick Campaign.



Select the entity or record type that is to be used.



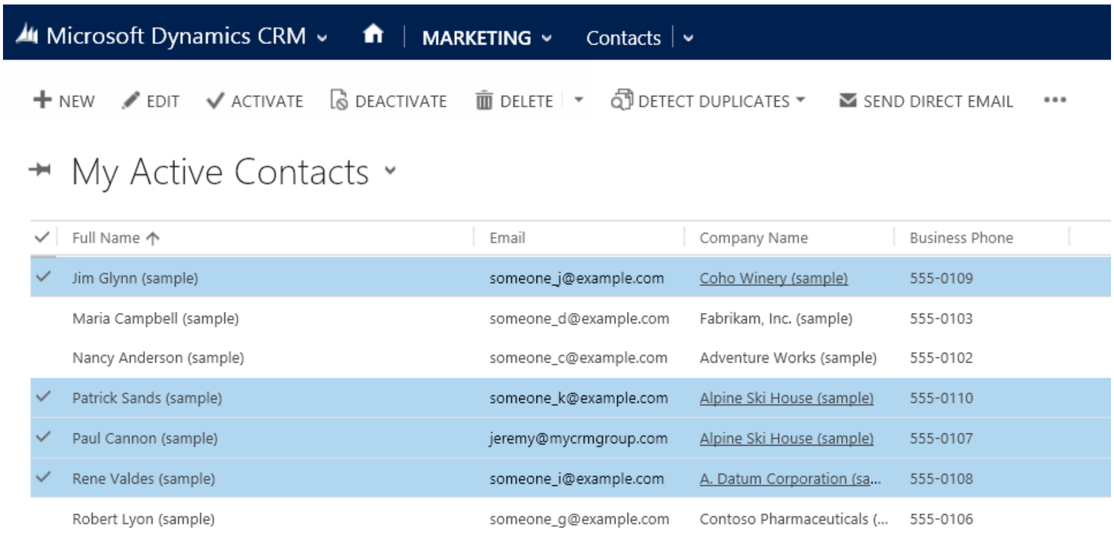
Then go on to populate the survey email with the relevant information and the URL generated for the Survey.



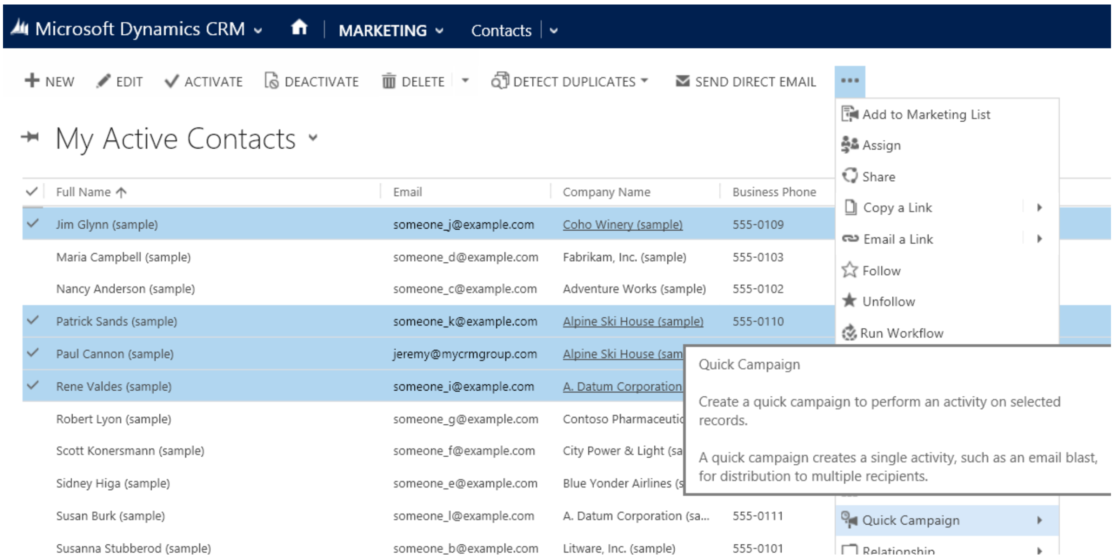
Note the email URL for the survey was generated in the same way as sending to a single recipient.

Create a Quick Campaign

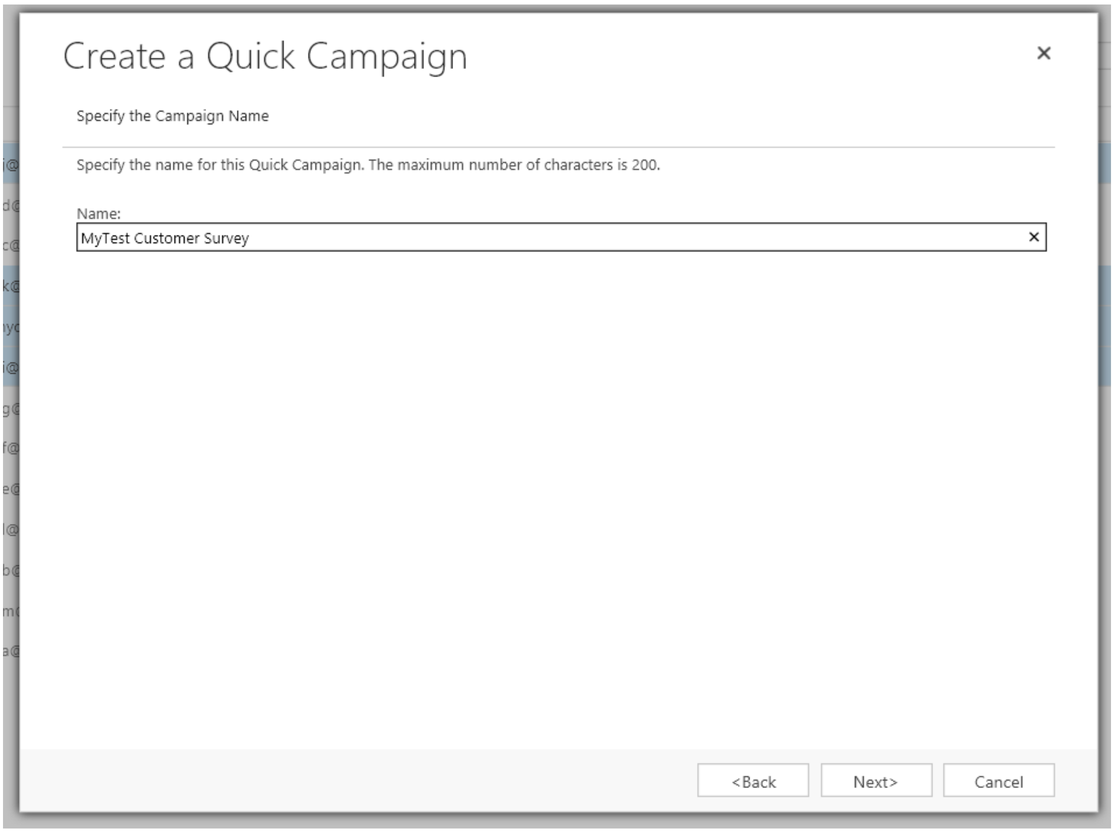
Quick campaigns can be run from many areas in CRM. In this example we highlight a number of contact records in CRM, and a run a Quick campaign to send emails based on the template created in the above section.



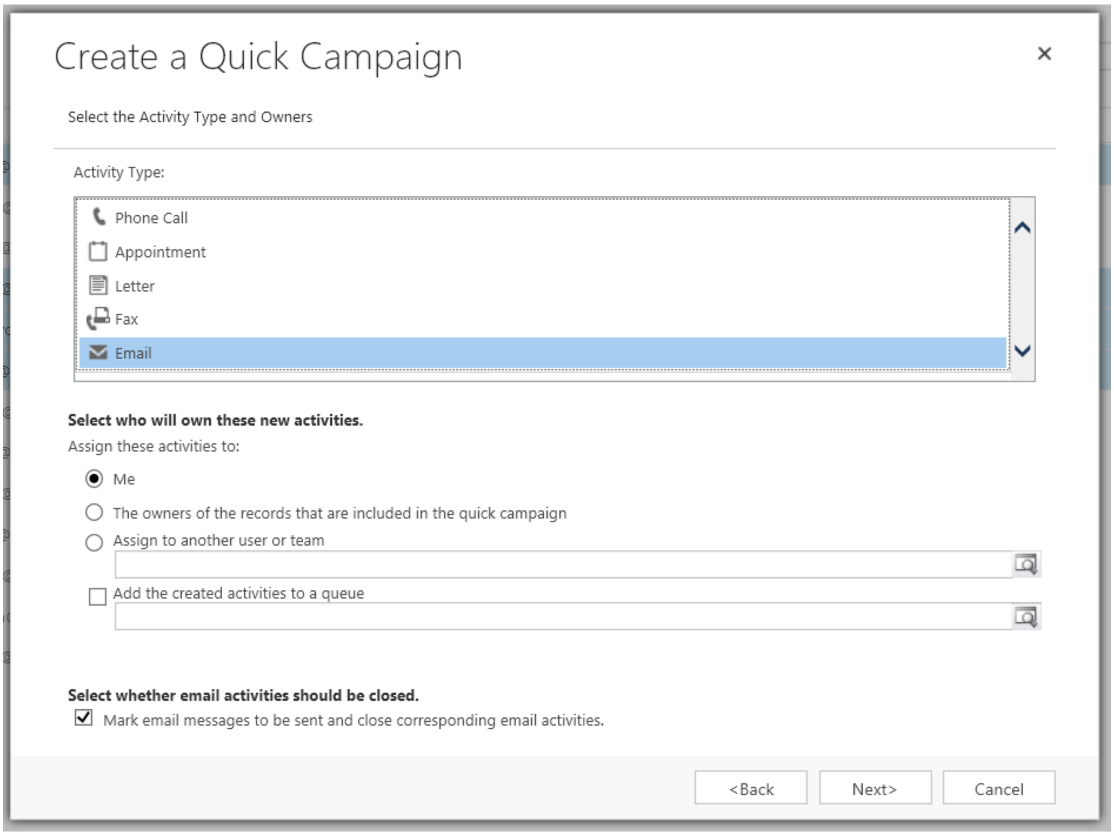
Select the quick campaign option from the main tool bar to setup and run the campaign.



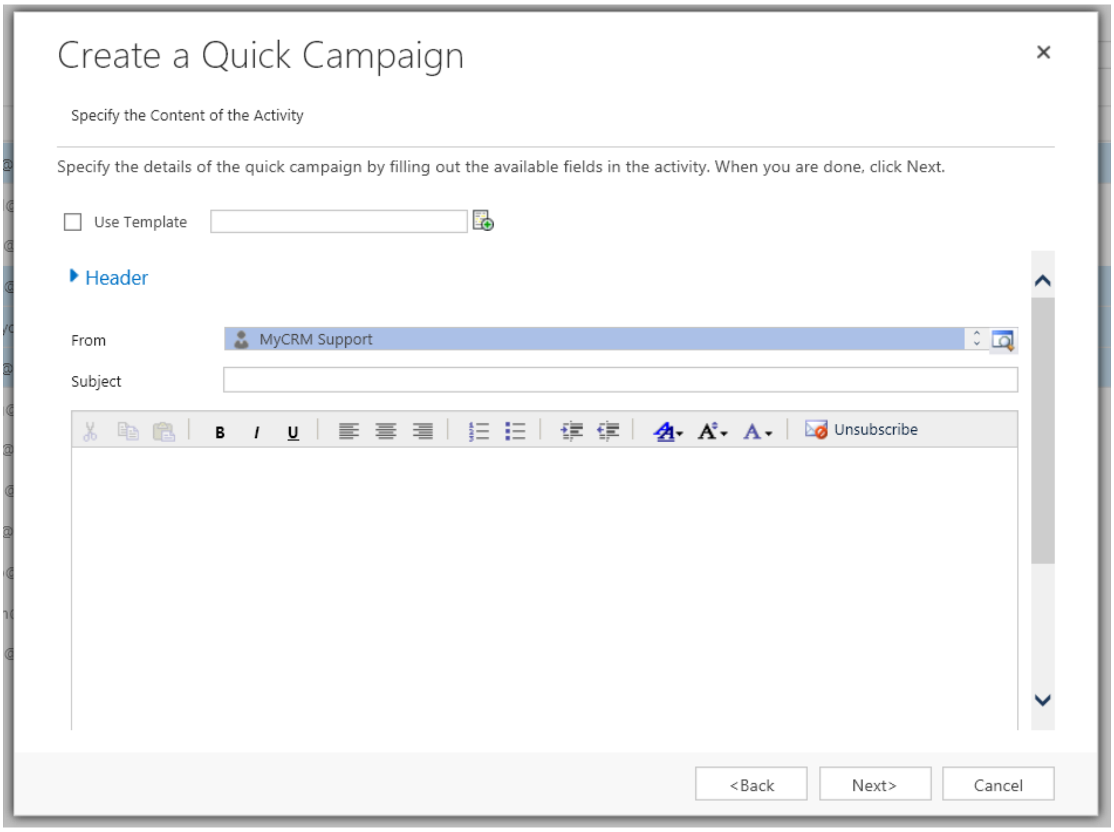
From the Quick Campaign screen follow the wizard style process



Select next, then select email from the list of activity types.

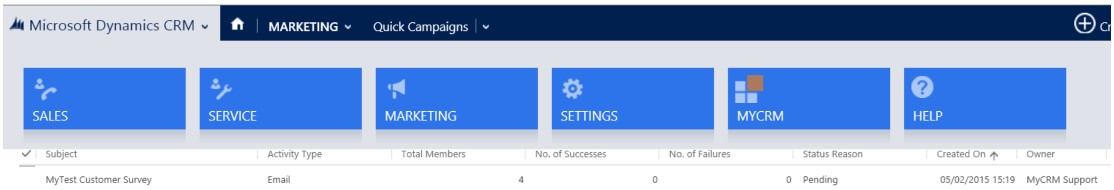


Select next again to populate the email, either with text or select the template created above.

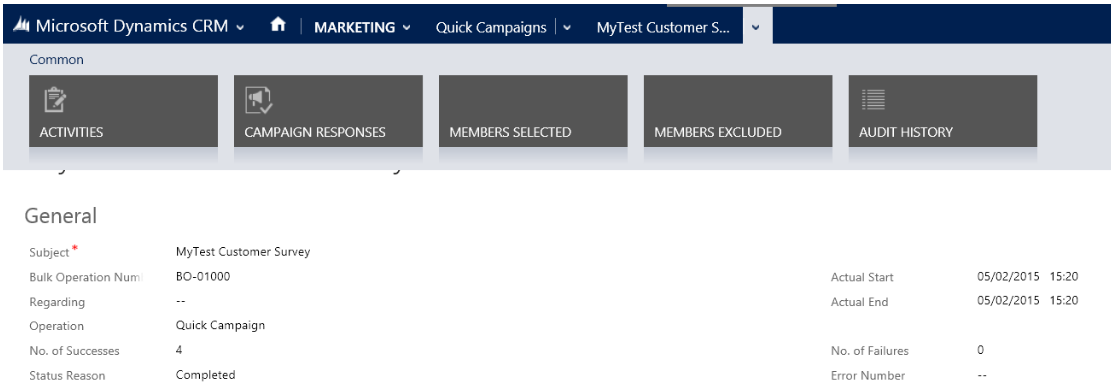


To complete the process, select next and then review the screen, and select next again to create and process the campaign.

The Quick Campaign will appear in the standard area under Marketing



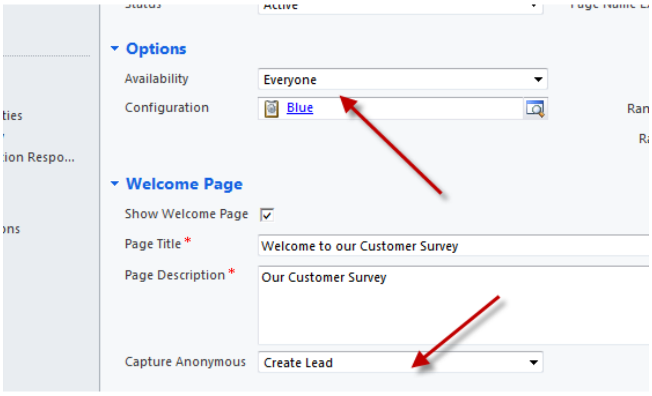
From this area you can open up the campaign and see the emails that have been created and sent.



Using Surveys on a Web Site or as part of Social Marketing

One of the great flexible features of having embedded surveys within CRM is that you do not actually need to send surveys out; links to surveys can be embedded into your website, Facebook pages or LinkedIn groups.

If you're using surveys in this manner then the survey will have to be set to everyone, so that anyone who visits the link can have the option to complete it.

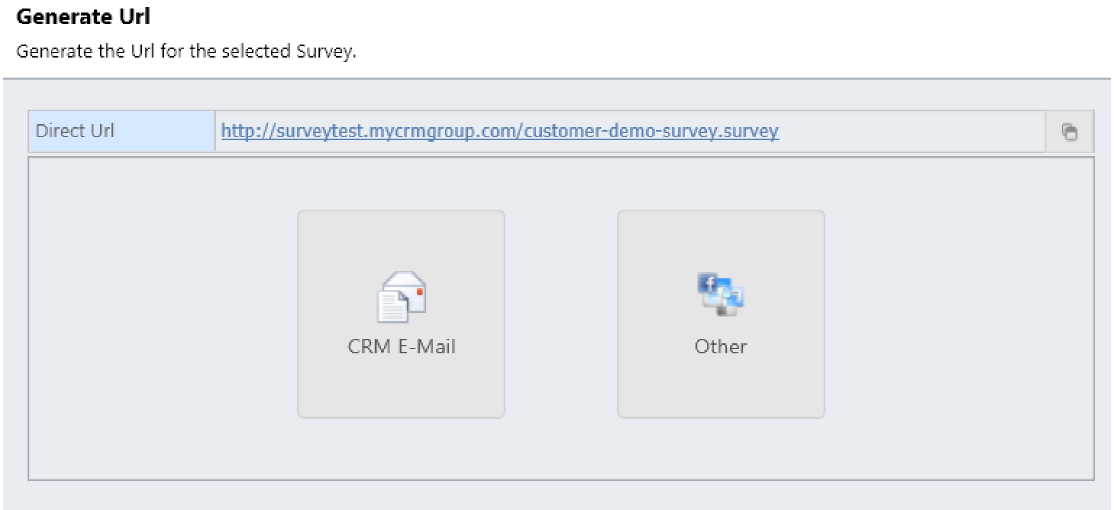


We would also recommend that you set the survey to create a lead record in CRM, so that anyone who completes your Poll or Short Survey can be registered as a lead in the CRM system.

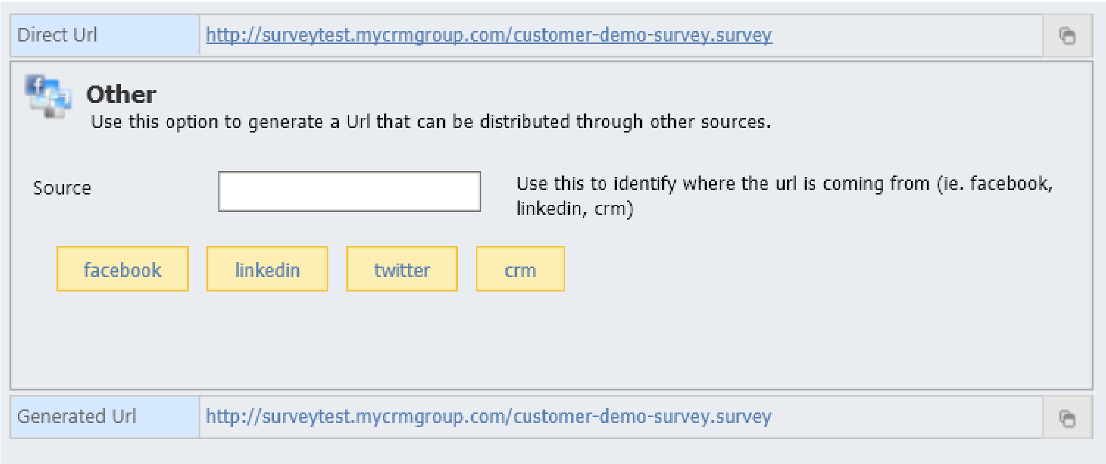
You can create a URL for the Survey as you did above, using the Generate URL button on the ribbon of the survey.

This time set the source to Website, Facebook or LinkedIn, or even Twitter, so that when an individual responds you can track the source from where the lead came from. This is especially beneficial when you are using the same Survey on many different sources.

To do this from the generate URL window select the “Other” option.

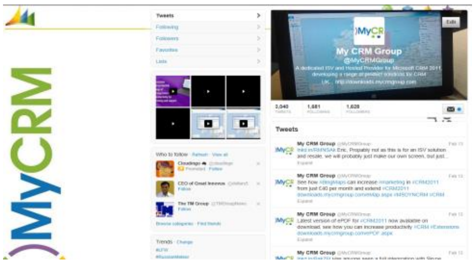


Then select the source that you want to use.



You can then copy the URL for the Survey and place this in your nominated location.

FaceBook

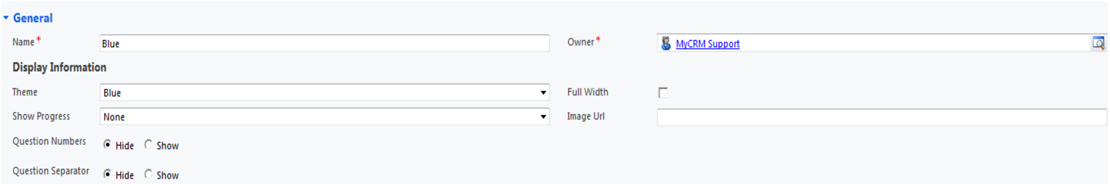


Twitter

Using Surveys in this way can be a great resource for runing marketing competitions i.e. “Complete a Survey to Win a ??”

Survey Configuration Pages.

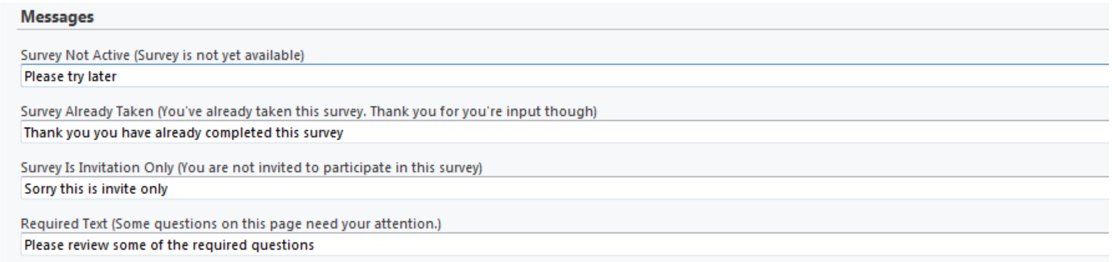
With eSurvey for Microsoft CRM you have the ability to create *Configuration Pages* which is used to override the default setting, changing the way the Survey is rendered to recipients.



The page is made up of a number of fields that allow configuration, including the name of the configuration page, the colour theme, progress avalibility, how the survey is to display and a URL that can be used to display a company image at the top of the Survey.

You also have the option to show or hide the question numbers, along with the ability to show or hide the question separator on the survey page view.

The configuration page also contains a number of messages that can be configured.

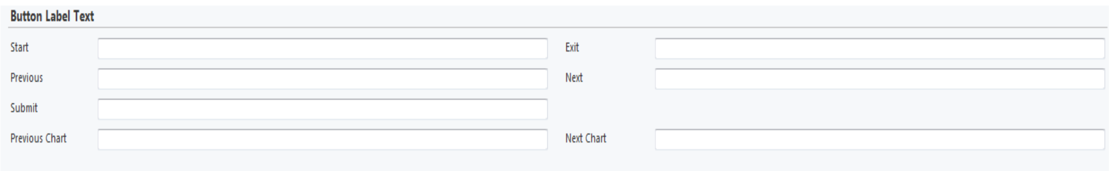


This includes a message if a link is tried before the survey is active, a message to an individual that has already responded and tries a second time, a message to inform a visitor that the survey is invite only, and a message to ask a recipiant to review uncompleted questions.

Each of these messages have default values, but any message placed in the configuration page will override the default messge.

Also on the configuration page there is the option to change the text on any of the other survey buttons that are displayed, making it easy to change a lauguage if using surveys in different regions.

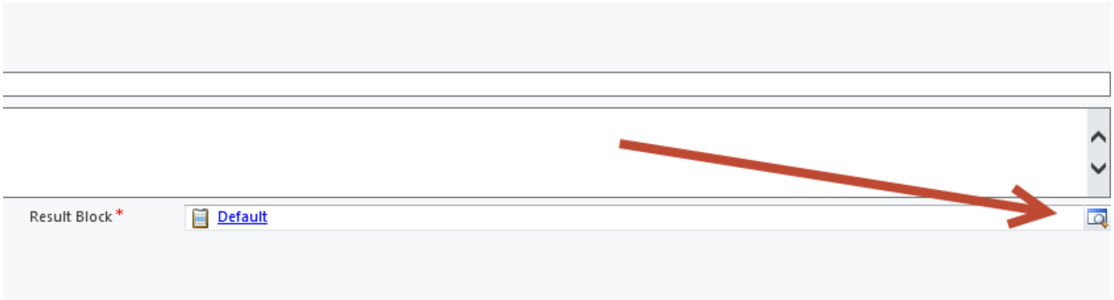
Each button has a default label text and the option to have that value changed.



Survey Results Pages

As part of the Thank You page configuration, result blocks can be added and displayed to the end recipient, a result block is based on the score value of the survey and works on a lower and upper score limit. Result blocks might not be appropriate in all survey circumstances so a default with no result blocks may be required.

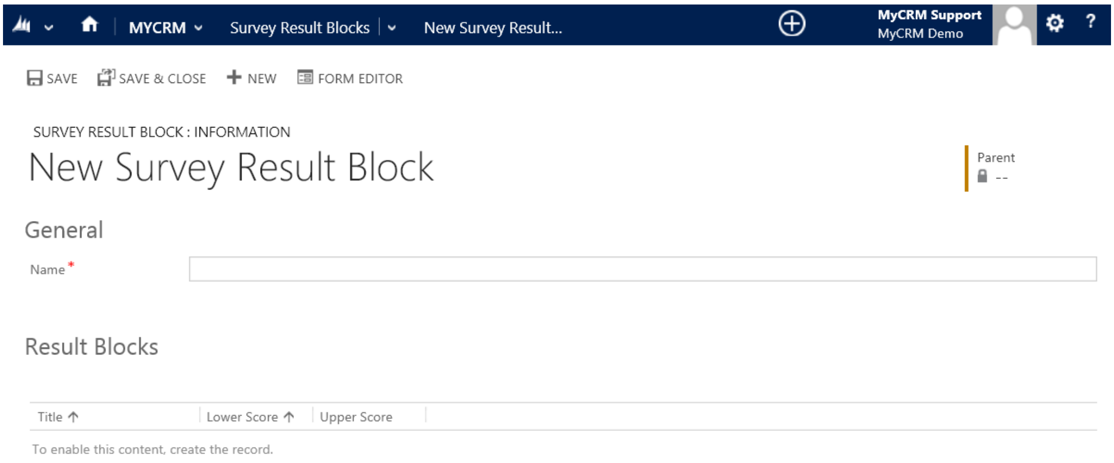
To set up result blocks use the look up on the survey form and select New



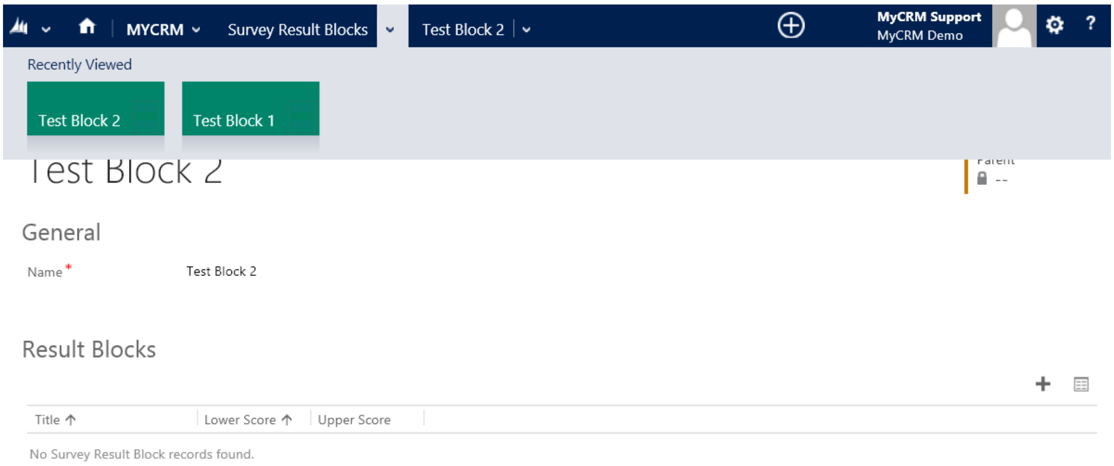
Then from the standard CRM popup window select new

Configuration of the result blocks can also be achieved from the settings area "Survey Tools" within CRM.

This will load the new result block record window.

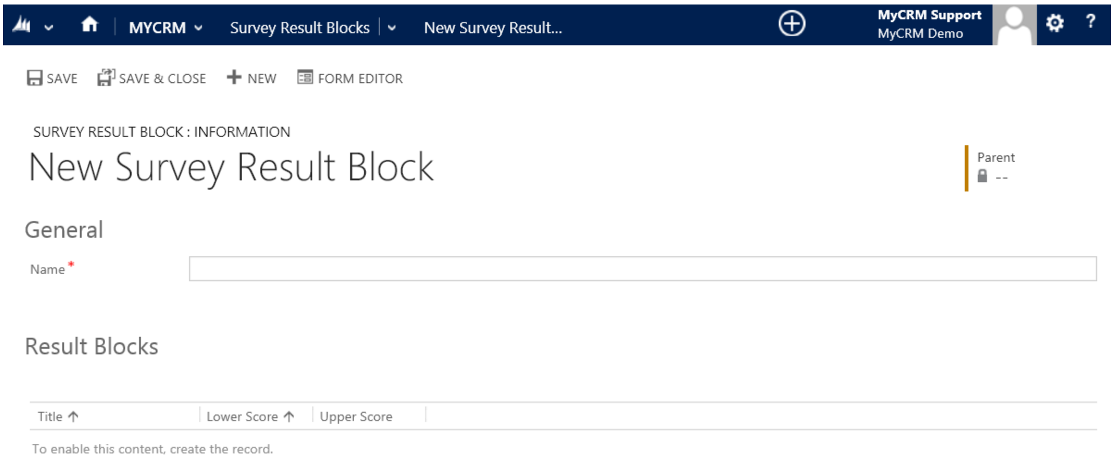


Give the new result block a name that is unique and save the record, once saved sub result blocks can be added.



From the menu, select the result blocks and add a new record from the main ribbon tool bar.

The following record is then displayed, and can be completed as an individual result block with related information.



Note; the result block works based on the score level achieved, so if multiple result blocks are to be used these should be given relevant score thresholds for both lower and higher margins.

By using the result block, the information displayed to the end recipient will be highlighted relating to the score they have achieved.

Using Surveys in Workflow / Dialogs

Standard Workflow

A survey can also be sent from the standard CRM workflow as this will send an email from the workflow. The body of the email can either use a template or a defined URL for a given survey.

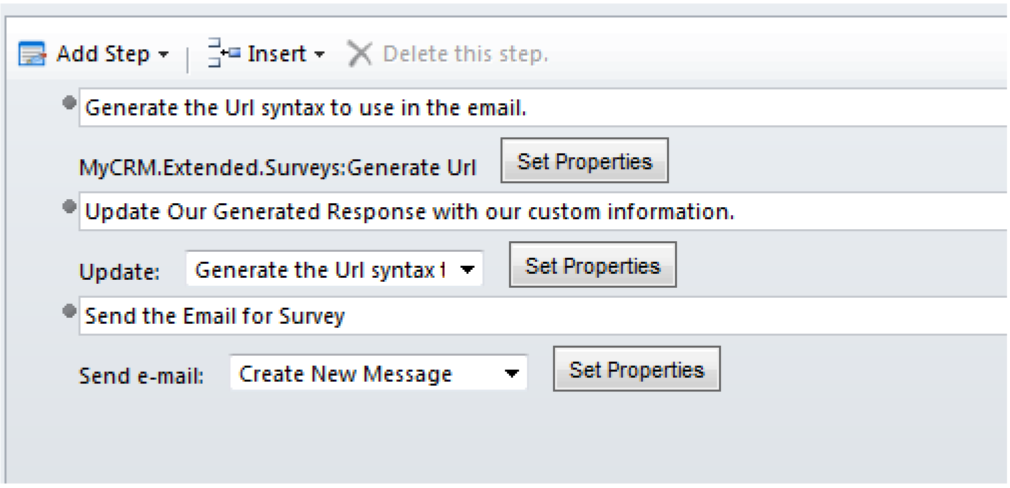
If using a workflow, there are likely to be actions that cause the email to be set. So the workflow process for your related business will need to be defined, as sending the email is likely to be only one part of the process.

Variations of how to use a workflow from CRM to send the survey are endless, but examples may include creating an action on the back of an account update, or when a case is closed.

Below is a given example of create a URL in a workflow for a Survey.

Open the workflow process as below and you can quickly see that we have some new MyCRM functions.

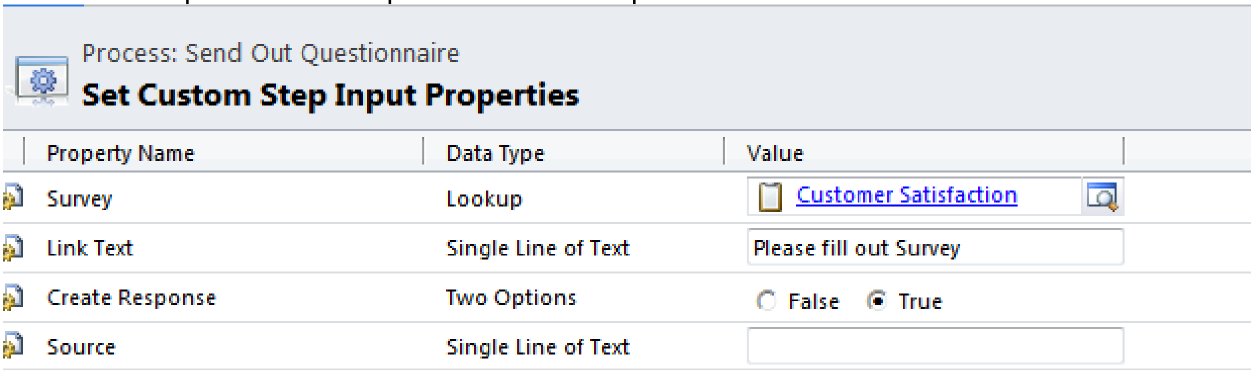
Here we detail how to use the Workflow Plugin in a **Workflow** process within CRM. The steps required for the Workflow Plugin are the same when creating for a **Dialog** as they are when creating a **Workflow**. In this section we look at using the workflow in the next section we show how a Dialog can be created.



The above screenshot show an example of Using the Workflow Plugin.

First step is to add the Workflow Plugin step to your workflow, click on **Add Step** and select from the menu **MyCRM.Extended.Surveys** > **Generate Url**.

Enter a description for the step and click Set Properties.



From the Set Properties windows you can set the Input Properties for the Workflow Plugin to generate the URL link format for the email.

Survey, Link Text and **Source** are all used to Generate the URL in the same way that you would use the Generate URL screen from the Survey form.

Setting **Create Response** to **True** will create a Survey Response activity record (This is the record that is created when someone completes the Survey) and also passes the Id of this record in the URL.

This means when the user completes the Survey, the Survey Response is updated instead of a new one being created.

This allows you to, as is done in the example above, add additional information to the Survey Response.

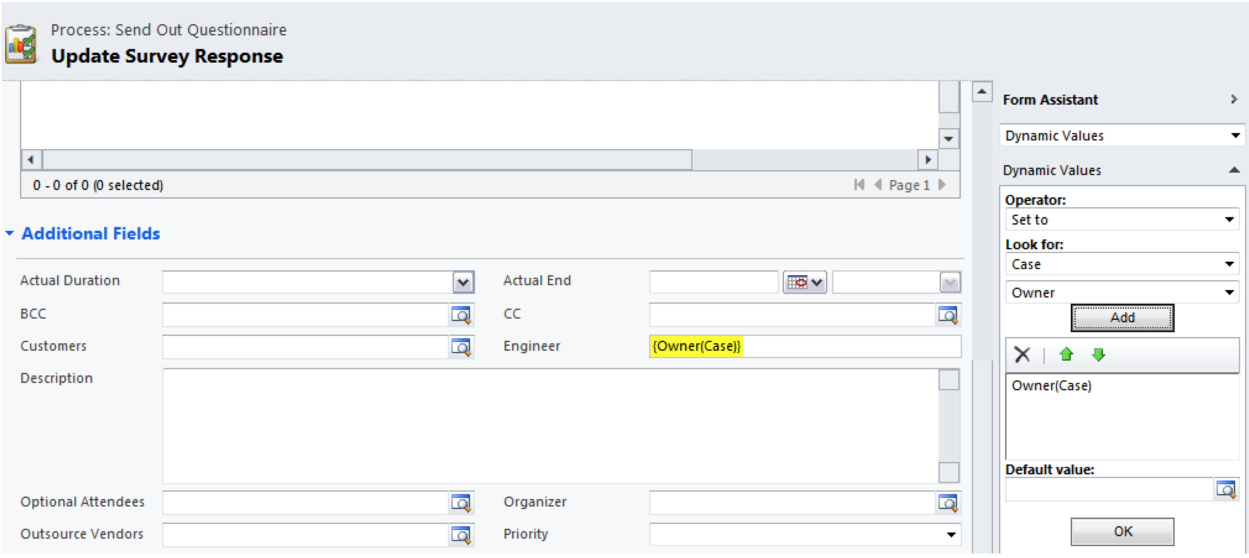
If the Survey has been complete and the same link is used (with the Survey Response Id) to complete the Survey again, then this time instead of updating the Survey Response a **new** Survey Response is created.

If you want to prevent the user from taking the Survey again you will need to change the Survey Options by setting **Availability** to “Invitation Only” and clearing the **Repeatable** check box.

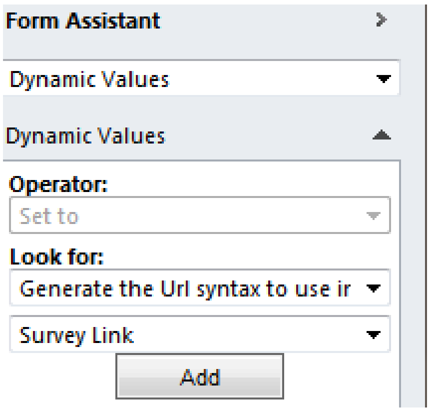
Note: If you update any of the default Survey Response fields, these may be changed when the Survey is completed.

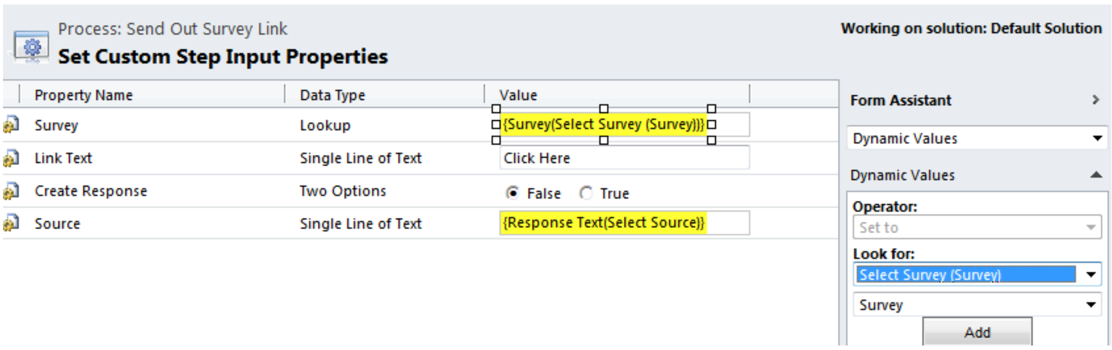
To update the Survey Response in workflow, click **Add Step** and select **Update Record**. From the step that appears, click the drop down list to select the record to update. From the list select the name of the step where you added the Workflow Plugin, this will appear under the section **Entities Created By Steps**.

Click the Set Properties button and add your additional information, in this example I have created a relationship to System User called “Engineer” and set the value to the Owner of the Case.



In the last step of the Workflow I have added a **Send e-mail** step and selected the **Survey Link** from the **Local Values** section in Dynamic Values: **Look for:**. And again selecting the Description given to the Workflow Plugin step.

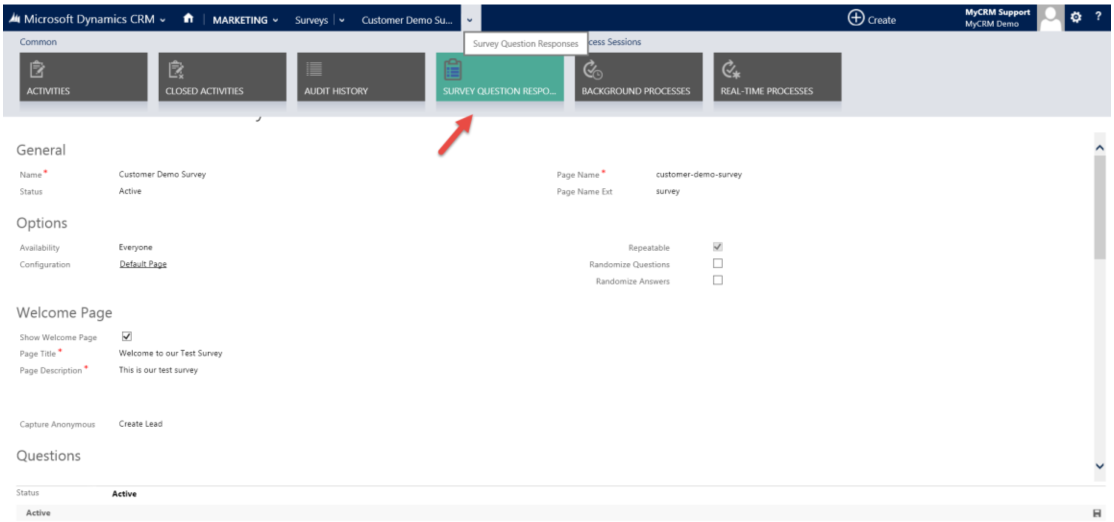




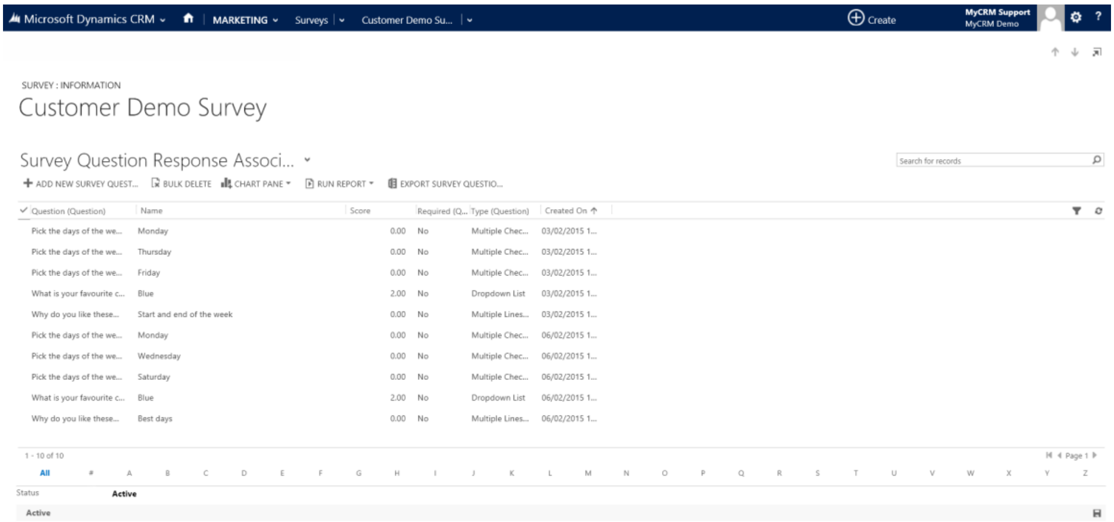
Understand Survey Results

So far we have outlined how to create and send the survey from Microsoft Dynamics CRM, in this section we look at the results that are generated and how these are presented.

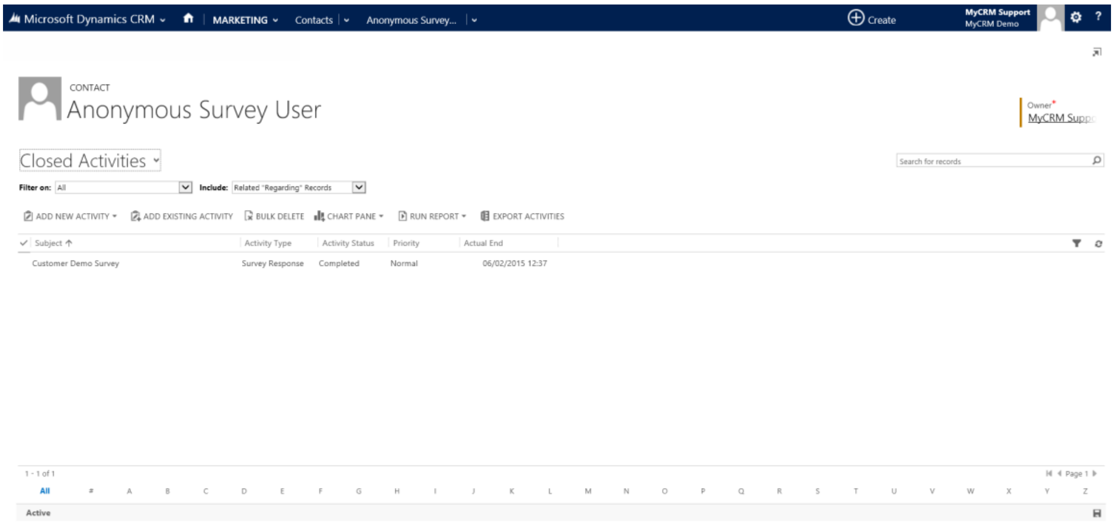
All interactions are recorded as a “Survey Question Response” and will be visible from within the survey to which they relate.



With each recipient’s response, an activity record is also created against the survey and the related recipient. The response activity will contact all the related answers as below.



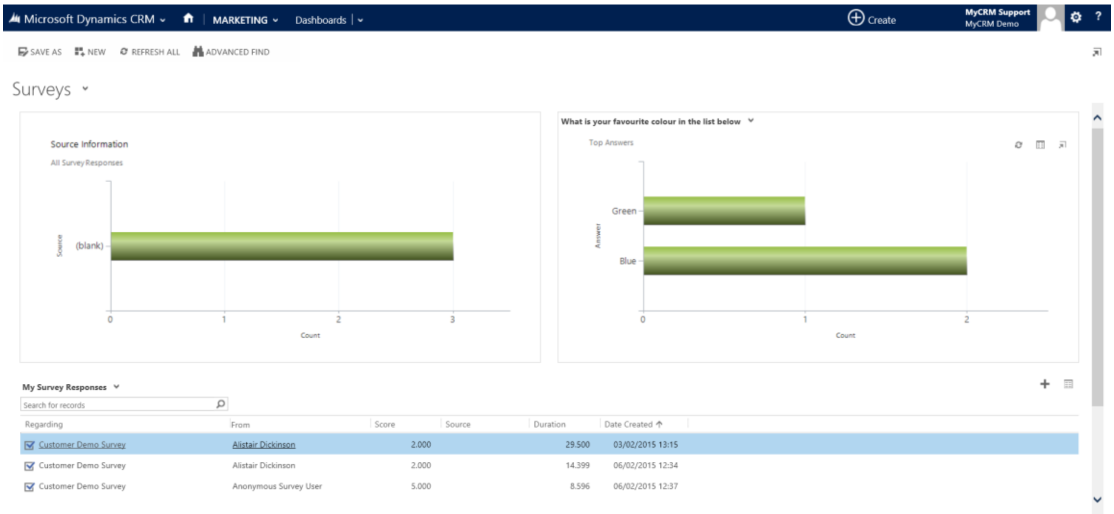
If the recipients' record is then opened, the associated response will be seen in the activity history of the related record.



As all of the data from the Survey tool is held in the CRM database, tools like advanced find and dashboards can be used to display information and data collated by the surveys.

Using Dashboards.

As part of the standard setup of eSurvey a dashboard for survey data is created.



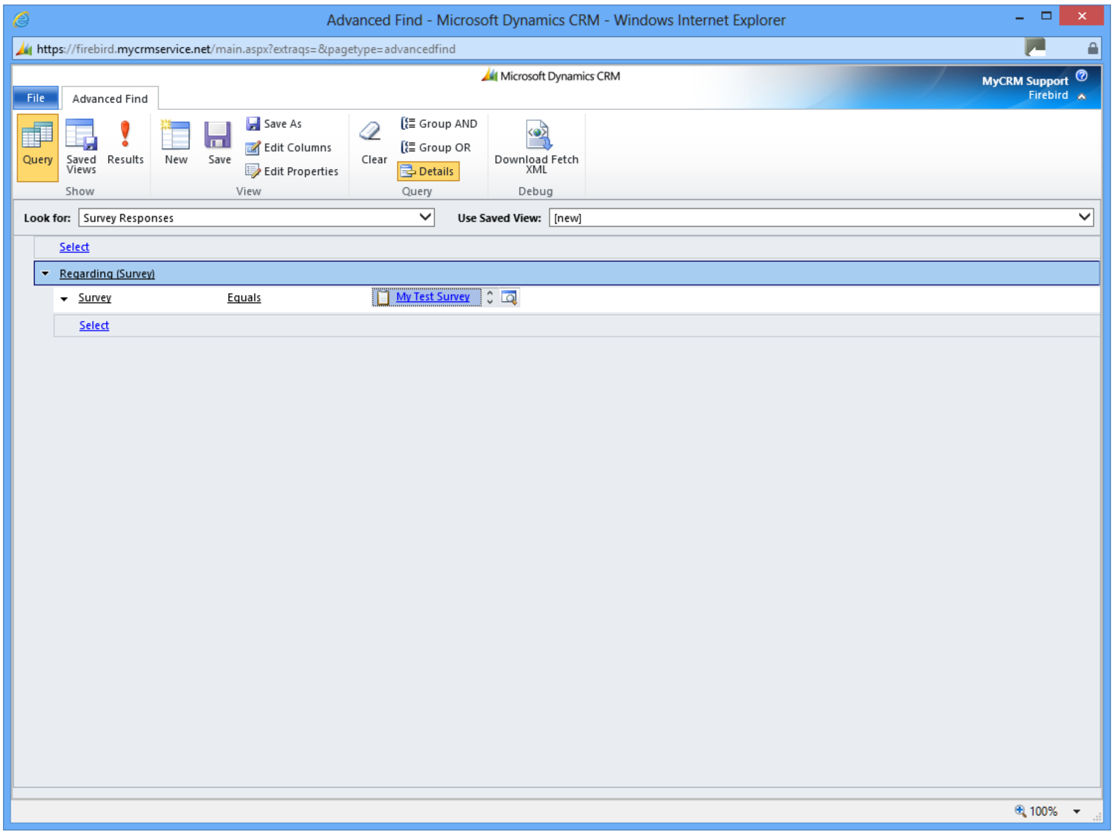
Various data and views are available and as questions are created, new views are defined within the system.

Using Advanced Find with Surveys

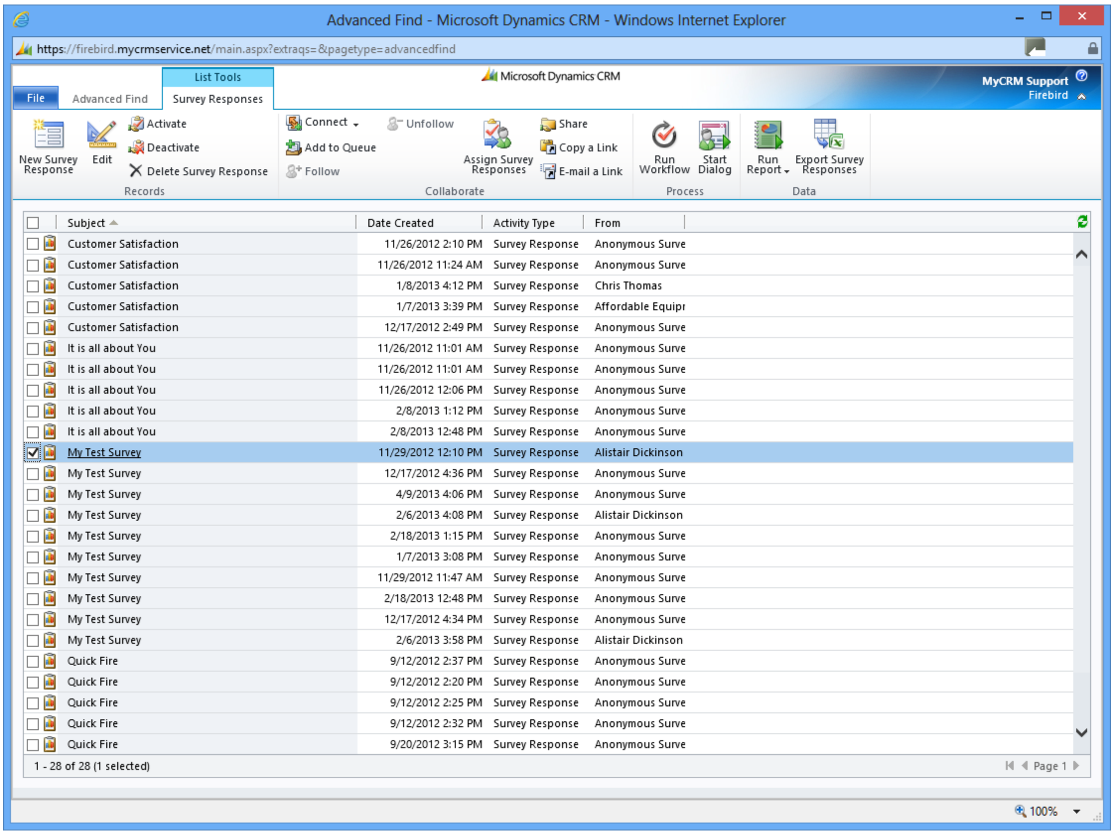
As mentioned before, all the data that is created and collected using eSurvey is held within the CRM database. Meaning that this data can be analyzed using the inbuilt Advanced Find tools.

The screen shot below shows an example of getting a list of responses created by a survey, but by using the same principal you could easily get a list of contacts that had completed a Survey.

Search Criteria for Survey Responses

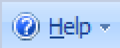


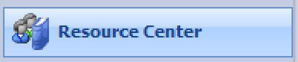
From the example below that a list of related Survey responses are returned.



Getting Help

We think Microsoft Dynamics is intuitive and straightforward to use, but we all need a little assistance at times. If you have trouble with anything during your trial, it's good to know that there are plenty of places you can turn to for help.





Online help within Microsoft CRM

- As with all Microsoft products, help is available at the click of a mouse throughout the system. Wherever you see the Help icon (usually the top right hand corner of the screen), you can view contextualised help for the task you are currently working on.

Resource Center within Microsoft CRM

- The Resource Center is a collection of guides and articles which is maintained by Microsoft themselves. Here you will find all sorts of information from beginner level right up to expert.

MyCRM Support

- Our team of specialists are on-hand throughout your free trial to help you with any queries and problems you may encounter.
- email crmsupport@mycrmgroup.com