

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.

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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.

4	Microsoft Dynamics CRM	~ ♠	MARKETING 🗸	Surveys 🗸	
<	QUICK CAMPAIGNS	SURVEYS	Surveys ≚	? QUESTIONS	⊂ ⊻
	✓ Name ↑ Customer Demo Survey		Status Reas	on Capture Anonymous Create Lead	Page Nam customer-

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.

🕂 NEW

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.

雄 Microsoft Dyna	mics CRM 🖌 📫 MARKETING 🗸	Questions 🛛 🖌 New	Question		🕀 Create	MyCRM Support MyCRM Demo	O,	¢	?
🔒 SAVE 📲 SAVE &	CLOSE 🕂 NEW 💷 FORM EDITOR						\uparrow	\downarrow	al.
QUESTION : INFORM	MATION								
New Qu	estion								
General									^
Question * Description									
Type *	Single Line of Text	Required *	No	Group					
CRESET ANSWERS									
Answer				Score	Properties Maximum Length	30			
					Score	1			
Status	Active								
Activo									

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

Type *		Single Line of Text
		Single Line of Text
+ Add	💼 Rer	Checkbox Multiple Checkboxes
Answer		Radio button Dropdown List
		Rating Number

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.

🊈 Microsoft Dynamics CRM 👻 🏫 MARKETING 👻 Questions 👻 What is your favouri 👻	🕀 Create	MyCRM Support MyCRM Demo	O,	۵	?
🕁 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🔓 DEACTIVATE 🍵 DELETE 🏶 ASSIGN 📿 SHARE 🚥			↑	1	яī
QUESTION : INFORMATION What is your favourite colour in the list below					
General					^
Question* What is your favourite colour in the list below Description Select a Colour Match Type* Dropdown List Required* No Group + ADD ANSWER REMOVE ANSWERS ESET ANSWERS Iteration Iteration					
Answer Score	Edit Answer				
Red 1	Answer :				
Blue 2	Score :				
Purple 0				_	
Orange 0	Order Chart Type	Always use this order Pie		•	
					~
Status Active					
Active					

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

(- L ŵ	* 🌣
	My Test Survey	Exit	
	Page 1		
	What is your Favorite Colour		
		Submit	

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.

🊈 Microsoft Dynamics CRM 🗸 👘 MARKETING 👻 Questions 👻 Enter your Business 🗸	() Create	MyCRM Support MyCRM Demo	0	۵	?
🕁 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🔓 DEACTIVATE 📋 DELETE 🏶 ASSIGN 😲 SHARE 🚥			\uparrow	\downarrow	яī
question : information Enter your Business Address					
General					^
Question * Enter your Business Address Description Registered Address					
Type Multiple Lines of Text Required No Group					
₿ RESET ANSWERS					
Answer Score	Properties No Prope	rties available.			
					~
Status Active					

My Test Survey	Exit
Page 1	
Enter you Business Address Unit14 Medina Village Medina Business Park Cowes, PO31 7LP	Ŷ
	Submit

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?'

\mu Microsoft Dyn	amics CRM 🗸 📫	MARKETIN	NG ∽ Que	stions 🗸	Is Pluto a	a Planet 🗸			() Create	MyCRM Support MyCRM Demo	0	۵	?
🕞 SAVE [SAVE	& CLOSE + NEW	DEACTIVATE	💼 DELETE	🗳 ASSIGN	🗘 SHARE						\uparrow	ψ	al.
QUESTION : INFOR	a Planet												
General													^
Question * Description	ls Pluto a Planet												
Туре*	Checkbox			Required *		No		Group					
CRESET ANSWER	is and the second se												
Answer								Score	Edit Answer				
Checkbox is ticked	i							1	Answer :				
Checkbox left clea	r							0	Score :				
									Properties				ı.
									Display Text				
													~
Status	Active												
Active													

(Ø http://survey.mycrmgrc P マ 習 で Ø My Test Survey ×		× ★ \$
	My Test Survey	Exit	
	Page 1		
	Is Pluto a Planet Of Course		
		Submit	

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

🚈 Microsoft Dynamics CRM 👻 🏠 MARKETING 👻 Questions 👻 Which Download Pr 👻	() Create	MyCRM Support MyCRM Demo	0	¢	?
🖬 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🔓 DEACTIVATE 📋 DELETE 静 ASSIGN 📿 SHARE 🚥			\uparrow	\downarrow	al.
QUESTION : INFORMATION Which Download Product have you tried in the last 6 months					
General					^
Question Which Download Product have you tried in the last 6 months Description					
Type multiple Cirectadaxes Required NO Croup					
Answer Score	Edit Answer				
ePDF 0	Answer :				
eSpeil 0	Score :				
eTax 0	Properties				
	Order	Always use this order	~	9	1
					~
Status Active					
Active					

Customer Demo Survey	
2	
You have completed 75 % of the survey so far:	
	100%
 4. Which Download Product have you tried in the last 6 months ePDF eSpell ePurchasing eTax 	
Previous	Submit

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



) 🍘 http://survey.mycrmgro 🏴 P - 習 C 🥔 My Test Survey 🛛 🗙	Ĥ
My Test Survey	Exit
Page 1	
When using the Download Centre how do you find the registration process?	
○ Very Easy	
🔘 Enter Answer	
🔘 Enter Answer	
Not sure why a need to register	
	Submit

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.

🌬 Microsoft Dynamics CRM 🗸 👘 MARKETING 🗸 Questions 🗸 When installing Lice 🗸	Create	MyCRM Support MyCRM Demo	0	¢	?
🕁 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🔓 DEACTIVATE 📋 DELETE 静 ASSIGN 🗘 SHARE 🚥			\uparrow	Ψ	71
QUESTION : INFORMATION When installing Licence Manager for MyCRM how was it ?					
General					^
Question* When installing Licence Manager for MyCRM how was it ? Description					
Type [*] Dropdown List Required [*] No Group					
ADD ANSWER TREMOVE ANSWER CRESET ANSWERS Answer Score Control of the first of	Edit Answer				
Had to Call Support 0	Answer :	Full of Errors			
Slight Problem used attached help file 0	Score :	0			
Why do I need this 0	Description				
Full of Errors 0	Properties	Abusus use this series		2	
Did not bother 0	Chart Type	Pie		3	
Status Active				-	~
Active					H

🔁 🧭 http://survey.mycrmgrc 🟴 🔎 🗟 🖒 🏈 My Test Survey 🛛 🗙	۵ 🖈
My Test Survey	Exit
Page 1	
When installing the Licence Manager for MyCRM how was it	
Installed No Probem	
	Submit

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.

🖊 Microsoft Dynamics CRM 🗸 👘 MARKETING 🖌 Questions 🖌 How Oftern do you 🗸	⊕ Create	MyCRM Support MyCRM Demo		¢	?
🖬 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🔓 DEACTIVATE 🍵 DELETE 🏶 ASSIGN 📿 SHARE 🚥			\uparrow	Ψ	яī
question : information How Oftern do you Go Out					
General					^
Question How Oftern do you Go Out Description Type* Rating Required* No Group					
ADD ANSWER ■ REMOVE ANSWER RESET ANSWERS Answer Score	Edit Answer				
Strongly Agree 1	Answer :				
Agree 0.5	Score :				
Disagree -0.5					
Strongly Disagree -1	Properties		_		
	Display Mode	isplay All Labels	~		
	charcippe	10			~
Status Active					R

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.

Generate Url Webpage Dialog
https://firebird.mycrmservice.net/%7B63494557885000000%7D/WebResources/mycs_/Su
Reset Answers Reset the answers back to the default values.
Select Scale
Agreement Quality Frequency Likelihood 1-10 Strongly Agree Agree Agree Neutral Disagree Strongly Disagree Strongly Disagree Strongly Disagree
Reset Cancel

My Test Survey				Exit
Page 1				
How oftern do you go o	out			
Frequently	Often	Sometimes	Seldom	Never
Ŭ	Ŭ	Ŭ	<u> </u>	Ŭ

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.

🗯 Microsoft Dynamics CRM 👻 🏦 MARKETING 👻 Questions 👻 How much is the Io 🗸	🕀 Create	MyCRM Support MyCRM Demo	0	۵	?
🛱 SAVE 🛱 SAVE & CLOSE 🕂 NEW 🔓 DEACTIVATE 🍵 DELETE 🏶 ASSIGN 😲 SHARE 🚥			\uparrow	\downarrow	яī
question : INFORMATION How much is the loan amount					
General					^
Question* How much is the loan amount Description					
Type [*] Number Required [*] No Gro	up				
Answer	Score Properties				L
	Display as Slide	r 🗸		^	
	Minimum	100			
	Maximum	25000			
	Step	25			
	Default Value	0			
	Prefix			~	1
	Sullix				
					~
Status Active					
Active					

This question type is then displayed on the survey as

() 🧭 http://survey.mycrmgrc 🏴 の 👻 🖉 🌈 My Test Survey 🛛 🗙	ŵ	★ 🌣
	My Test Survey	Exit	
	Page 1		
	How much is the Loan amount? 1000 - 11275		
		Submit	

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		e Survey 🔈
Save & Save & New Save & Save & Close X Delete Save	Image: Sharing - Image: Sharing - Image: Sharing -	
Information		
L General	Pate of Birth	Questions 👻 🛧 🔱
Related	4 General	
Common Audit History	Question * Date of Birth	
Survey Question Resp	Description	
4 Processes	Type* Date / Time Required *	○ No ● Yes
🎯 Workflows		
📰 Dialog Sessions	Answer Score	Properties
		Display Mode Date Only
		Min Date
		Max Date
		Can Change Year 🗸
		Year Range
		Can Change Month
		Allow Keyboard Input

	19/06	5/192	9			×	
	0	Jun		✓ 19	29	~	0
	Su	Мо	Tu	We	Th	Fr	Sa
							1
	2	3	4	5	б	7	8
	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
l	30						

MyCRM Extended – Working With eSurvey

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	\checkmark
Min Date	10/06/2013	
Max Date	10/08/2013	
Can Change Year		\checkmark
Year Range		
Can Change Month	I.	\checkmark
Allow Keyboard Inp	out	

Date of Birth

	Aug		✓ 20	13	 ~	0
u	Мо	Tu	We	Th	Fr	Sa
				1	2	3
4	5	б	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

Properties		
Display Mode	Date Only	\checkmark
Min Date	10/06/2013	
Max Date	10/08/2013	
Can Change Year		
Can Change Mont	'n	\checkmark
Allow Keyboard In	put	

Date of Birth

0		n		201	3	D
Su	Mc A	ug Ug		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						
	© Su 2 9 16 23 30	Image: Constraint of the second sec	Jun Jul Su Mc 2 3 4 9 10 11 16 17 18 23 24 25 30 5 5	Jun Jul Su Mc 2 3 4 5 9 10 11 12 16 17 18 19 23 24 25 26	Jun 2013 Jul Jul Jul Th Su Mc Aug Th 2 3 4 5 6 9 10 11 12 13 16 17 18 19 20 23 24 25 26 27	Jun 2013 Jul Th Fr Jul Th Fr 2 3 4 5 6 7 9 10 11 12 13 14 16 17 18 19 20 21 23 24 25 26 27 28

Properties		
Display Mode	Date and Time	\checkmark
Min Date		
Max Date		
Can Change Year		
Can Change Month		
Allow Keyboard Inp	ut	
Time Format	24 Hour	\checkmark
Time Display Mode	Slider	\checkmark

Date of Birth

24/07	7/201	3				14:40
0		Ju	ly 20 ⁻	13		0
Su	Мо	Tu	We	Th	Fr	Sa
	1	2	3	4	5	δ
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			
me		14:4	0			
our						
/linut	te					
No	w				Do	ne

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.

+ NEW

This will open a new blank Survey.

🛎 Microsoft Dynamics CRM 🗸 🏦 MARKETING 🗸 Surveys 🗸 New Survey	🕀 Create	MyCRM Support AyCRM Demo
☐ SAVE ∯ SAVE & CLOSE 🕂 NEW 🗐 FORM EDITOR		↑ ↓ ⊼
survey:information New Survey		
General		^
Name Page Name Status Draft Page Name Ext survey		
Options		
Availability Everyone Repeatable Configuration Randomize Questions Randomize Answers		
Welcome Page		
Show Welcome Page Page Title Page Description A Page Description		
Capture Anonymous 🔒 Do not Capture		~
Status Active		

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.

General			
Name *		Page Name *	
Status	Draft	Page Name Ext	survey

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.

Options			
Availability	Everyone	Repeatable	\checkmark
Configuration		Randomize Questions	
		Bandomize Answers	

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 <u>Page Title</u> field and the <u>Page Description</u> 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 <u>Do Not Capture</u> (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.

Welcome Page

Show Welcome Page
Page Title
Page Description

Capture Anonymous 🔒 Do not Capture

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

🗯 Microsoft Dyna	rnics CRM 👻 🏠 MARKETING 👻 Surveys 👻 Customer Demo Su 👻		() Create	MyCRM Support 🛛 🖨 ? MyCRM Demo	ĺ
🖶 SAVE 🛱 SAVE &	CLOSE 🕂 NEW 🗹 OPEN 🔓 DEACTIVATE 🍵 DELETE 😼 GENERATE URL 🚥			原 ↓ ↑	
survey : informat	er Demo Survey				
General				^	
Name*	Customer Demo Survey	Page Name customer-demo-survey			
Status	Active	Page Name txt survey			
Options					
Availability	Everyone	Repeatable 🗹			
Configuration	Default Page	Randomize Questions			
Welcome Pag	e				
Show Welcome Page					
Page Title *	Welcome to our Test Survey				
Page Description *	This is our test survey				
Capture Anonymous	Create Lead			v	
Status	Active				
Active				8	

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.

Questions	
🕂 ADD PAGE 🛛 🖍 EDIT PAGE	2 NEW QUESTION
	? Questions
	Enter your Business Address
Pick the days of the week you like the best	How much is the loan amount
What is your favourite colour in the list below	How Oftern do you Go Out
Why do you like these days the most	a Is Pluto a Planet
	Pick the days of the week you like the best
	2 What is your favourite colour in the list below
	When installing Licence Manager for MyCRM how was it ?
	When using the download sector how do you

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.

🕂 AD	D PAGE	ø	EDIT	PAGE
		~		

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 <u>Thank You Page</u> which will be displayed once the survey is completed by a recipient.

In this section information can be added like a <u>Page Title</u> and <u>Page Description</u> 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.

4 Microsoft Dynamics CRM 🗸		🗙 МА	RKETING ~	Surveys 🗸	Customer Demo	Su 🗸	
RAVE	🛱 SAVE & CLOSE	+ NEW	🗹 OPEN	🗟 DEACTIVATE	<u> </u> DELETE	GENERATE URL	•••

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

My Test Survey			Exit
Welcome to our Customer Sun	/ey		
Our Customer Survey			
			Start

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

My Test Survey				Exit
Page 1				
How Old are you?				
16 - 30				
31 - 45				
0 46 - 60				
🔵 61 plus				
What Colour is Your I	lair			
What Colour is Your I Hair Blonde	lair			•
What Colour is Your I Hair Blonde To the Nearest foot h 1ft	lair ow Tall are You	 	 	•
What Colour is Your Hair Hair Blonde To the Nearest foot h 1ft	lair ow Tall are You			•
What Colour is Your Hair Hair Blonde To the Nearest foot h 1ft	lair ow Tall are You		 	
What Colour is Your Hair Hair Blonde To the Nearest foot h 1ft	lair ow Tall are You	 	 	•

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

My Test Su	vey	Exit
Welcome to ou	Customer Survey	
Our Customer Sur	rey	
First Name:	*	
Last Name:	*	
Email:	*	
	* Required Field	
		Start

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.

🚈 Micro	soft Dynamics C	RM v	♠ ма	RKETING - S	Surveys 🗸	Customer Demo S	Su 🗸
R SAVE	🚰 SAVE & CLOSE	╋ NEW	🗹 OPEN	🗟 DEACTIVATE	<u> </u> DELETE	GENERATE URL	•••

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

Generate Url

Generate the Url for the selected Survey.

Direct Url	http://surveytest.mycrmgroup.com/custo	tp://surveytest.mycrmgroup.com/customer-demo-survey.survey					
	CRM E-Mail	Other					

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.

Direct Url	http://surveytest.mycrmgroup.co	tp://surveytest.mycrmgroup.com/customer-demo-survey.survey					
CRM E-Mail Use this option to generate a Url to use in CRM E-Mails.							
Link Display Text :		(Leave this blank to show the survey url.)					
Source Use this to identify where the url is coming from (ie. facebool linkedin, crm)							
facebook	linkedin twitter	crm					
Generated Url	{survey[survey=customer-demo-	-survey.survey]}	6				

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.

🚈 Microsoft Dyr	namics CRM 🗸 🏦 SALES 🗸 Dashboards 🖌 Customer Survey 🗸	
💌 send 🛛 🔒 sav	e 🛱 save & close 🕘 attach file 📮 insert template 📑 insert article 🚦 convert to 👻 🚥	
EMAIL 🔻		
Custor	ner Survey	Priority Normal
From	🍰 MyCRM Support	
То	Alistair Dickinson:	Q
Cc		
Bcc	**	
Subject	Customer Survey	
Attachments		
		+
File Name 🛧	File Size (Bytes)	
No Email Attachme	nt records found.	
3 🖻 🛍 🗌	3 / U 臣 吾 冨 註 译 译 🦺 🗛 🖧 A. 🧕 Insert Template 🖺 Insert Article	
Hi Alistair		
Please take our su	rvey {survey[survey=customer-demo-survey&source=crm]}	
Support		

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.

MyCRM Support	12:40	□ 🍸
Please Take our Customer Survey CRM:0001315		- `
CRM Support FW: eSurvey	12:37	۵Ÿ
CRM Support	12:27 ຟ	٥Ÿ

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

Please Take our Customer Survey CRM:0001315

MyCRM Support <support@mycrmgroup.com>

Follow up. Start by 07 February 2013. Due by 07 February 2013.
 Sent: Thu 07/02/2013 12:40

To: 🔲 Alistair Dickinson

Dear Alistair

Please take our Customer Survey

Click Here

WIth kind regards

Customer Services

My Test Company

MyCRM Support

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.

🗯 Microsoft Dynamics CRM 🗸 👘	SETTINGS - Ten	nplates	
Email Templates	rt Dialog More Action	15 ¥	
✓ Title ↑	Template Type	Viewable By	Language
Account Reconnect	Account	Organization	English(1033)
Bulk Deletion Task Completed With Failure Template	System Job	Organization	English(1033)
Bulk Deletion Task Completion Template	System Job	Organization	English(1033)
Rulk Deletion Task Failed Template	System Joh	Organization	Fnalish(1033)

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

🥖 🛛 Email Template Typ	be Webpage Dialog			
Attps://demo.mycrmhosted.ne	et/Tools/EmailTemplateEditor/Di 🔒			
Email Template Type Select a template type to use for this new email template.				
Template Type	Global			
	OK Cancel			
🔮 Internet Protected Mode: On	₽			

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

<i>e</i> E-mail Template	e: Customer Test Survey - Windows Internet Explorer	Х
🏄 https://firebird	mycrmservice.net/tools/emailtemplateeditor/emailtemplateeditor.aspx?id=%7bA28C5B1D-1975-E211-AD7F-B8AC6F16	₽ 2
File 🖬 🕅	Save and Close 🔹 Insert/Update 🔯 Delete 🐴 Actions 🗸 🔞 🖉	<u>⊣</u> elp +
E-mail T	emplate: Customer Test Survey Working on solution: Default Sol	ution
Type *	Contact Template Language English	
Title *	Customer Test Survey	
Description		
Subject *	Please let us know how we are doing and take our Customer Survey	
χ 🖻 💼	B / U ≣ ≣ ≣ ∰ H A. A. M. Unsubscribe	
Hi <mark>{!Contact</mark> We would lil {survey[survey	:First Name;} ke you to take our short customer survey to let us know what you think about the MyCRM products and Services. r=my-test-survey.survey&text=Take%20Survey&source=feb2013]}	
Kim Thomps	son	
Customer Si	ervices, MyCRM	
Attachmente		•
	R _100%	•

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.

/	州 Microsoft Dynamics CRM 🗸 📫 MARKETING 🖌 Contacts 🗸				
+	NEW 🖋 EDIT 🗸 ACTIVATE 🗋 DEACTIVATE	🗑 delete 🔹 🖏 detect	T DUPLICATES 👻 🗹 SENE	DIRECT EMAIL	
Ŧ	➡ My Active Contacts ◄				
\checkmark	Full Name 🔨	Email	Company Name	Business Phone	
~	Jim Glynn (sample)	someone_j@example.com	Coho Winery (sample)	555-0109	
	Maria Campbell (sample)	someone_d@example.com	Fabrikam, Inc. (sample)	555-0103	
	Nancy Anderson (sample)	someone_c@example.com	Adventure Works (sample)	555-0102	
~	Patrick Sands (sample)	someone_k@example.com	Alpine Ski House (sample)	555-0110	
~	Paul Cannon (sample)	jeremy@mycrmgroup.com	Alpine Ski House (sample)	555-0107	
~	Rene Valdes (sample)	someone_i@example.com	A. Datum Corporation (sa	555-0108	
	Robert Lyon (sample)	someone_g@example.com	Contoso Pharmaceuticals (555-0106	

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

/	^M Microsoft Dynamics CRM ~ 🏫 MARKETING ~ Contacts ~							
+	NEW 🖋 EDIT 🗸 ACTIVATE 🔓 DEACTIVATE	🛅 DELETE 💌 🖏 DETEC	T DUPLICATES 👻 🔤 S	SEND DIRECT EMAIL	•••			
					Add to Marketing List			
+	→ My Active Contacts →							
~	Full Name A	Email	Company Name	Business Phone	🗘 Share			
Ť.	lim Glupp (sample)	comeono i@ovamplo.com	Coho Winony (cample)	555-0100	🗋 Copy a Link 🔹 🕨			
Ŷ	Jin Gynn (sample)	someonej@example.com	cono winery (sample)	555-0109	🖘 Email a Link 🔹 🕨			
	Maria Campbell (sample)	someone_d@example.com	Fabrikam, Inc. (sample)	555-0103	☆ Follow			
	Nancy Anderson (sample)	someone_c@example.com	Adventure Works (sample	e) 555-0102	🛨 Unfollow			
~	Patrick Sands (sample)	someone_k@example.com	Alpine Ski House (sample	<u>a)</u> 555-0110	🗟 Run Workflow			
~	Paul Cannon (sample)	jeremy@mycrmgroup.com	Alpine Ski House (sam	Ouick Campaign				
~	Rene Valdes (sample)	someone_i@example.com	A. Datum Corporation	Create a quick compai	an to porform an activity on colocto	-1		
	Robert Lyon (sample)	someone_g@example.com	Contoso Pharmaceutic	tiq records.		u		
	Scott Konersmann (sample)	someone_f@example.com	City Power & Light (sa	A quick campaign crea	ates a single activity, such as an ema	il blast,		
	Sidney Higa (sample)	someone_e@example.com	Blue Yonder Airlines (s	for distribution to mul	tiple recipients.			
	Susan Burk (sample)	someone_l@example.com	A. Datum Corporation (sa	a 555-0111	Quick Campaign			
	Susanna Stubberod (sample)	someone_b@example.com	Litware, Inc. (sample)	555-0101	Relationshin			

From the Quick Campaign screen follow the wizard style process

Specify the Campaign Name				
Specify the name for this Quick C	ampaign. The maximum nur	mber of characters is 200.		
Name:				
MyTest Customer Survey				

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

🕻 Phone Call		
🗂 Appointment		
📄 Letter		
🕞 Fax		
🔀 Email		×
Me The owners of the rec Accient to contherence	cords that are included in the quick campaign	
Assign to another us	er or team	0
Add the created activ	ities to a queue	
Add the created activ	ities to a queue	[

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

pecify the details of	the quick campaign by f	illing out the availab	e fields in the a	ctivity. When yo	ou are done, click Nex	t.
Use Template						
Header						~
From	🍰 MyCRM Support					े 🗔
Subject						
X 🖻 🛍 🛛	в и <u>и</u> 🗐 🧮 🗐			4 · A · A ·	😡 Unsubscribe	

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

	vicrosoft Dynamics CRM	🗸 🏚 MARKETING ~	Quick Campaigns 🗸					⊕cı
	SALES	SERVICE		Ö SETTINGS		MYCRM	? HELP	
~	Subject MyTest Customer Survey	Activity Type Email	Total Members	No. of Successes	No. of Failure	25 Status Reason 0 Pending	Created On Owner 05/02/2015 15:19 MyCRM 1	Support

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

4 Microsoft Dynam	nics CRM 🗸 🚹 MARKETING 🖌 Quick Campaigns 🗸 MyTest Customer S 🗸		
Common			
1		:	
	CAMPAIGN RESPONSES MEMBERS SELECTED MEMBERS EXCLUD	ED AUDIT HISTORY	
,	, ,		
General			
Subject *	MyTest Customer Survey		
Bulk Operation Num	BO-01000	Actual Start	05/02/2015 15:20
Regarding		Actual End	05/02/2015 15:20
Operation	Quick Campaign		
No. of Successes	4	No. of Failures	0
Status Reason	Completed	Error Number	

,

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.

	Status	Active raye non	in La
	▼ Options		
	Availability	Everyone 🔻	
ties	Configuration	📓 <u>Blue</u>	Ran
1			Ri
ion Respo			
	▼ Welcome Page		
	Show Welcome Page	v	
ons	Page Title *	Welcome to our Customer Survey	_
	Page Description *	Our Customer Survey	_
	Capture Anonymous	Create Lead 🖌 🗸	

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.

Micro:	soft Dynamics C	RM v	🕅 МА	RKETING ~	Surveys 🗸	Customer Demo	Su 🗸
🔒 SAVE	😭 SAVE & CLOSE	+ NEW	🗹 OPEN	🗟 deactivate	<u> </u> Delete	GENERATE URL	

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.

Generate Url

Generate the Url for the selected Survey.

http://surveytest.mycrmgroup.com/customer-demo-survey.survey			
CRM E-Mail	Other		
	http://surveytest.mycrmgroup.com/custor	http://surveytest.mycrmgroup.com/customer-demo-survey.survey	

Then select the source that you want to use.

Direct Url	http://surveytest.mycrmgroup.com/customer-demo-survey.survey	6			
• Other Use this option to generate a Url that can be distributed through other sources.					
Source Use this to identify where the url is coming from (ie. facebook, linkedin, crm)					
facebook linkedin twitter crm					
Generated Url	http://surveytest.mycrmgroup.com/customer-demo-survey.survey	6			

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



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.

▼ General			
Name*	Blue	Owner*	🖁 MyCRM Support
Display Informati	on		
Theme	Blue	Full Width	
Show Progress	None	 Image Url 	
Question Numbers			
Question Separator	€ Hide C Show		

The page is made up of a number of fields that allow configuration, including the name of the configuration page, the colour theme, progress avaiibility, 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.

Messages		
Survey Not Active (Survey is not yet available)		
Please try later		
Survey Already Taken (You've already taken this s	urvey. Thank you for you're input though)	
Thank you you have already completed this surv	2y	
Thank you you have already completed this sun Survey Is Invitation Only (You are not invited to p	ey articipate in this survey)	
Thank you you have already completed this sun Survey Is Invitation Only (You are not invited to ; Sorry this is invite only	ey articipate in this survey)	
Thank you you have already completed this sun Survey Is Invitation Only (You are not invited to p Sorry this is invite only Required Text (Some questions on this page nee	ey articipate in this survey) d your attention.)	

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.

Button Label Text						
Start		Exit				
Previous		Next				
Submit						
Previous Chart		Next Chart				

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.

🚈 🤟 🤺 🛉 МУСКІ	M 👻 Survey Result Blocks 🛛 👻 New Survey Result	\oplus	MyCRM Support AyrCRM Demo
🖬 SAVE 📲 SAVE & C	LOSE + NEW I FORM EDITOR		
survey result bloc New Surv	r: information /ey Result Block		Parent
General			
Name *			
Result Blocks			
Title 🛧	Lower Score 🔨 Upper Score		
To enable this content, c	reate the record.		

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

🍇 🗸 🏦 MYCRM	M 👻 Survey Result Blocks 👻	Test Block 2 🗸	\oplus	MyCRM Support Age ?
Recently Viewed				
Test Block 2	Test Block 1			
l est Bloc	КZ			arent
General				
Name *	Test Block 2			
Result Blocks				+ 🗉
Title 🛧	Lower Score 🛧 Upper Score			

No Survey Result Block records found.

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.

🚧 🗸 🏫 мүсг	RM 👻 Survey Result Blocks 🛛 👻 New Survey Result	\oplus	MyCRM Support MyCRM Demo
🖬 SAVE 🛛 🛱 SAVE &	CLOSE 🕂 NEW 🗐 FORM EDITOR		
survey result blo New Sur	vey Result Block		Parent
General			
Name *			
Result Blocks			
Title ↑	Lower Score 🛧 Upper Score		
To enable this content,	create the record.		

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.

📑 Add Step ▾ 📑 ज Insert ▾ 🗙 Delete this step.
 Generate the Url syntax to use in the email.
MyCRM.Extended.Surveys:Generate Url Set Properties
 Update Our Generated Response with our custom information.
Update: Generate the Url syntax 1 💌 Set Properties
Send the Email for Survey
Send e-mail: Create New Message 👻 Set Properties

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.

Process: Send Out Questionnaire Set Custom Step Input Properties							
Property Name	Data Type	Value					
Survey	Lookup	Customer Satisfaction					
🔊 Link Text	Single Line of Text	Please fill out Survey					
Create Response	Two Options	🔿 False 🔎 True					
Source	Single Line of Text						

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.

Process: Send Out Questionna Update Survey Respon	aire Se					
					Form Assistant	>
				-	Dynamic Values	•
•				•	Dynamic Values	
0 - 0 of 0 (0 selected)			N N Page	1 🕨	Operator:	
- Additional Fields					Set to	•
Additional Fields					Look for:	
Actual Duration	v	Actual End			Case	-
					Owner	•
BCC	Q	CC		Q	Add	
Customers	Q	Engineer {Ow	vner(Case)}		X 🖈 🐥	
Description					Owner(Case)	
					Default value:	
Optional Attendees	Q	Organizer		Q		цц.
Outsource Vendors		Priority		•	ОК	

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.

Form Assistant	>
Dynamic Values	•
Dynamic Values	
Operator:	
Set to	-
Look for:	_
Generate the Url syntax to use ir	•
Survey Link	•
Add	

Process: Send Out Su Set Custom Step	rvey Link Input Properties		Working on solution: Default Solution
Property Name	Data Type	Value	Form Assistant >
🔊 Survey	Lookup	-{Survey(Select Survey (Survey))}	Dynamic Values
🔊 Link Text	Single Line of Text	Click Here	
🔊 Create Response	Two Options	False C True	Dynamic Values
🔊 Source	Single Line of Text	{Response Text(Select Source)}	Operator:
			Look for: Select Survey (Survey) Survey Add

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.

Microsoft Dynan	nics CRM 🖌 👘 MARKETING 🗸	Surveys 👻 Customer Demo	5 Su 🗸				(+) Create	MyCRM Support MyCRM Demo	0 🗘 ?
Common			Survey Question Respons	es cess Sessions					
	CLOSED ACTIVITIES		SURVEY QUESTION RESPO		PROCESSES	C* REAL-TIME PROCESSES			
General	,		1						^
Name*	Customer Demo Survey		Pag	je Name *	customer-dem	to-survey			
Status	Active		Pag	je Name Ext	survey				
Options									
Availability	Everyone			Rep	eatable	×			
Configuration	Default Page			Randomize Qu	restions				
				Randomize A	Answers				
Welcome Page	2								
Show Welcome Page	\checkmark								
Page Title *	Welcome to our Test Survey								
Page Description *	This is our test survey								
Capture Anonymous	Create Lead								
Ouestions									
									~
Status	Active								
Active									в

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.

Microsoft Dynamics CRM 🗸 👘 MARKETING 🖌 Surveys 🗸	Customer Demo Su 🗸	① Create	MyCRM Support AyrCRM Demo
			↑ ↓ J
SURVEY : INFORMATION			
Customer Demo Survey			
Survey Question Response Associ •		Search for record	ds Q
🕂 ADD NEW SURVEY QUEST 🕼 BULK DELETE 📲 CHART PANE 👻 🗈 RUN REPOR	RT 🔻 🗓 EXPORT SURVEY QUESTIO		
✓ Question (Question) Name Sc	ore Required (Q Type (Question) Created On ↑		T 0
Pick the days of the we Monday	0.00 No Multiple Chec 03/02/2015 1		
Pick the days of the we Thursday	0.00 No Multiple Chec 03/02/2015 1		
Pick the days of the we Friday	0.00 No Multiple Chec 03/02/2015 1		
What is your favourite c Blue	2.00 No Dropdown List 03/02/2015 1		
Why do you like these Start and end of the week	0.00 No Multiple Lines 03/02/2015 1		
Pick the days of the we Monday	0.00 No Multiple Chec 06/02/2015 1		
Pick the days of the we Wednesday	0.00 No Multiple Chec 06/02/2015 1		
Pick the days of the we Saturday	0.00 No Multiple Chec 06/02/2015 1		
What is your favourite c Blue	2.00 No Dropdown List 06/02/2015 1		
Why do you like these Best days	0.00 No Multiple Lines 06/02/2015 1		
1 - 10 of 10			III 4 Page 1 ▶
All # A B C D E F C	SHIJKLMNOPQ	R S T U V	W X Y Z
Status Active			
Active			B

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

🖊 Microsoft Dynamics CRM 🖌 👘	MARKETING v Contacts v Anonymous Survey v	() Create	MyCRM Support NyCRM Demo
			R
	urvev Jser		Owner*
			MyCRM Suppo
Closed Activities ~		Search for re	cords D
Filter on: All	lude: Related "Regarding" Records		
🖄 ADD NEW ACTIVITY 👻 🔀 ADD EXISTING AC	tivity 🙀 Bulk delete 📲 chart pane * 🕑 run report * 📲 export activities		
✓ Subject ↑	Activity Type Activity Status Priority Actual End		T 0
Customer Demo Survey	Survey Response Completed Normal 06/02/2015 12:37		
1 - 1 of 1			H ∢ Page 1 ▶
All # A B C	DEFGHIJKLMNOPQ.	R S T U V	W X Y Z
Active			

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

Advanced Find - Microsoft Dynamics CRM - Windows Internet Explorer	- 🗆 🗙
// https://firebird.mycrmservice.net/main.aspx?extraqs=&pagetype=advancedfind	A 📕
File Advanced Find	MyCRM Support ⑦ Firebird 🔺
Query Saved Saved	
Look for: Survey Responses V Use Saved View: [new]	\checkmark
Select	
✓ Regarding (Survey)	
✓ <u>Survey</u> <u>Equals</u> <u>My Test Survey</u> 0 □	
Select	
	🔍 100% 🔻 🦽

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

Its all about You Date Created Advanced Find Survey Response Share Shar	https://firel	bird.mycrms	ervice.net/main.aspx?	extraqs=&paget	ype=advancedfind							
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Getting Help

you are currently working on.

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.



<u>MyCRM Extended – Working With eSurvey</u>