



IMPORT GUIDE

PowerScore

CRM 2011



Service



Support



Education



Add-ons

Contents

Import

Registration

Configuration

Freshness

Period

Check Freshness

Process Top

Security Roles

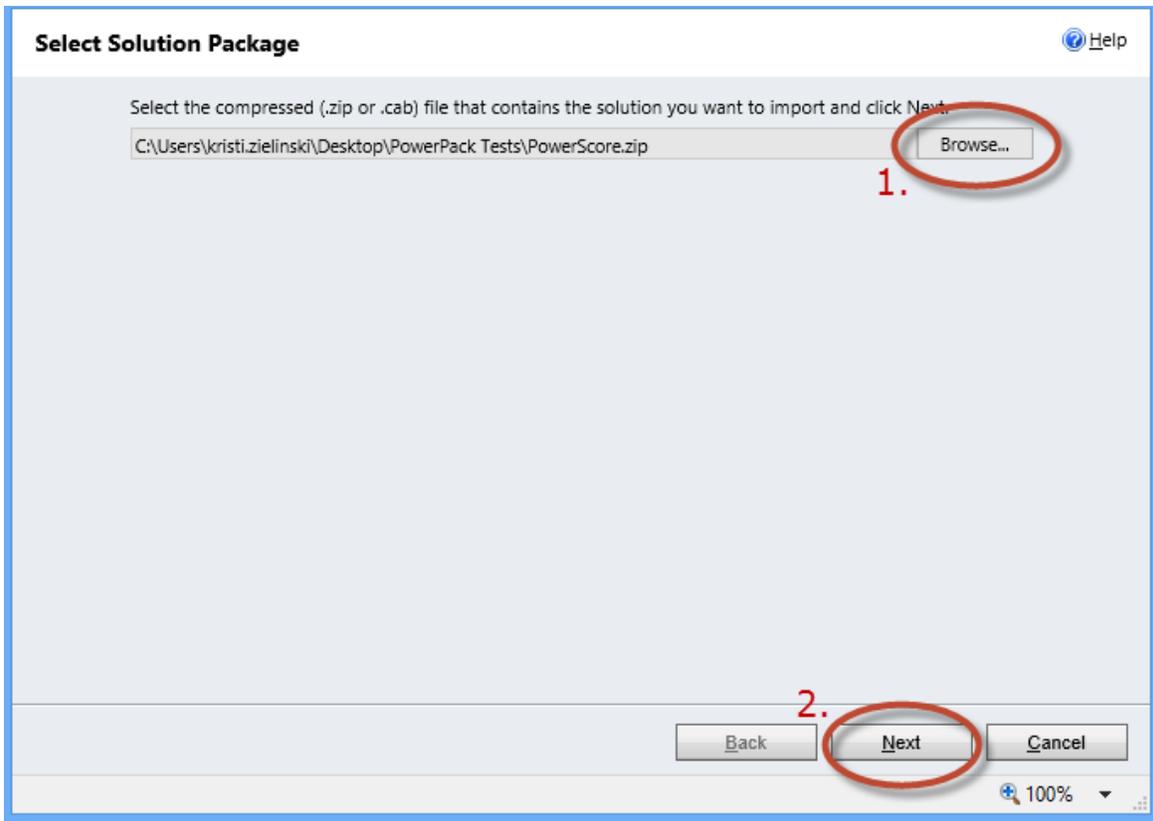
Uninstalling PowerScore



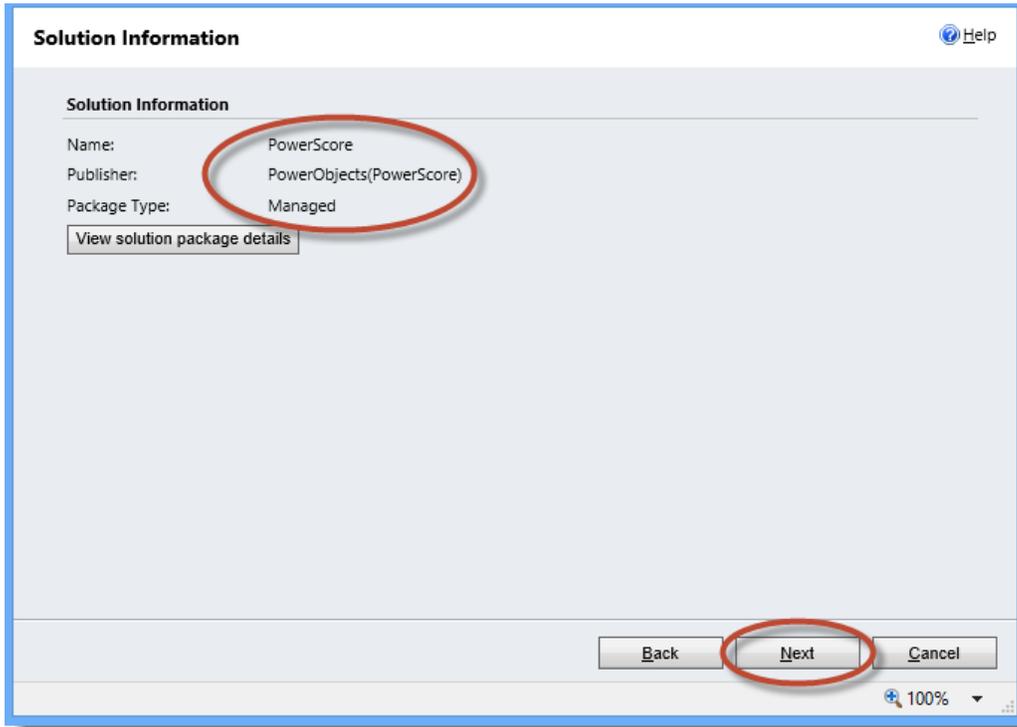
Import

The first step to installing any managed solution in Microsoft Dynamics CRM is to locate the file you want to install, download it and place it on your computer. In this instance, you would go to the PowerScore webpage, click on Download Solution and save the file in a convenient place on your computer.

After you're done with that, log in to your Microsoft Dynamics CRM 2011 as a System Administrator or System Customizer – you must have administrative privileges. Navigate to Settings > Solutions and click on Import. The next window that opens will let you browse for the solution you are importing – navigate to the file, select it and click Next.

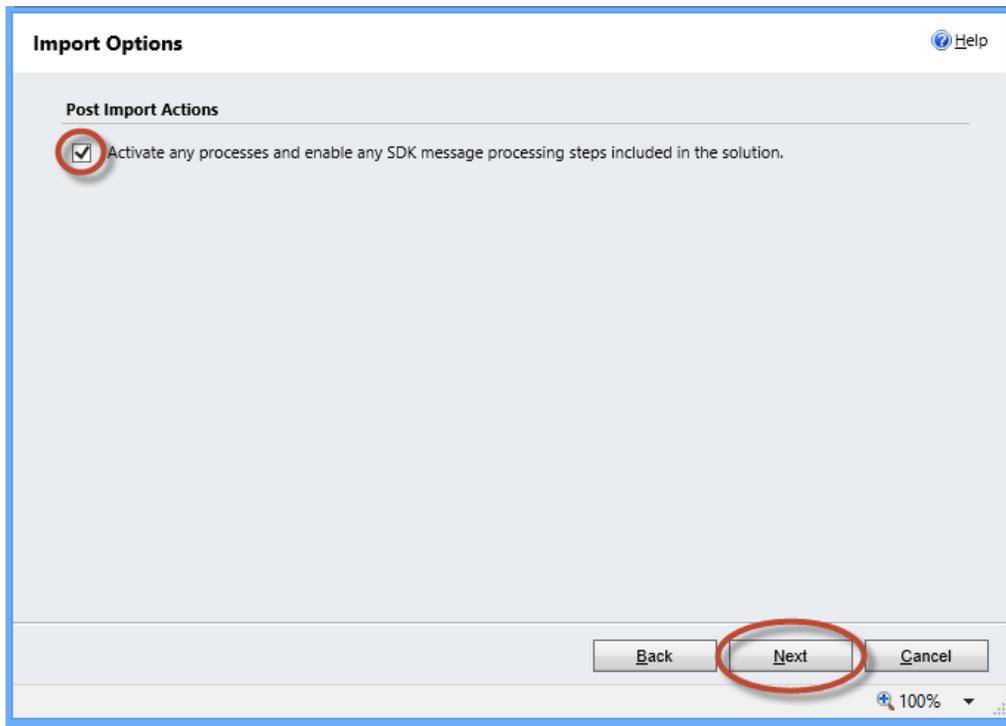


The next screen that opens up will show the Name / Publisher / Package Type of the solution you are installing. This screen should show PowerScore from PowerObjects.

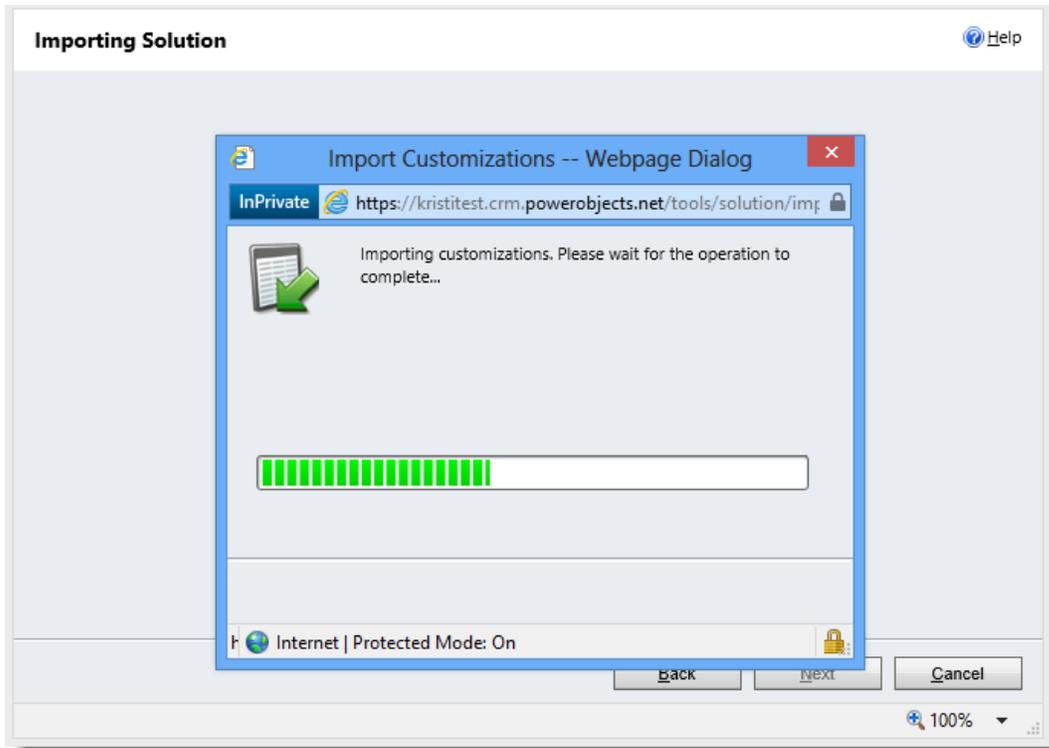


Click Next, and make sure to check the “Activate all processes...” checkbox, and click Next

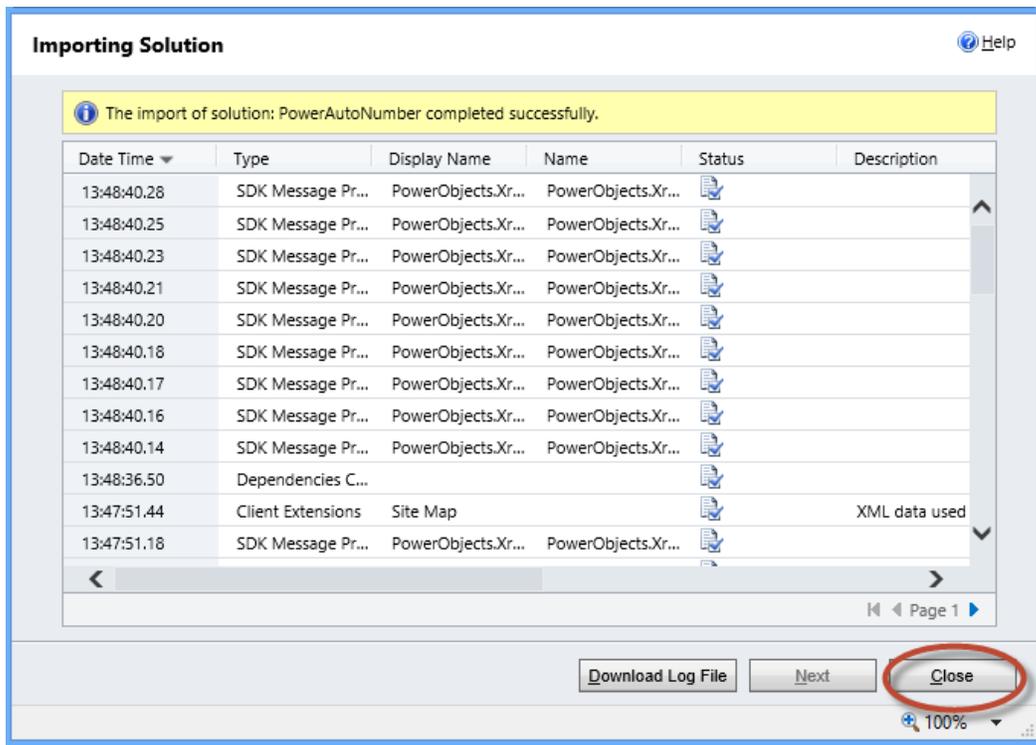
IMPORTANT: *If you do not check this box, the add-on **WILL NOT FUNCTION CORRECTLY!***



A green progress indicator will display while the solution imports.

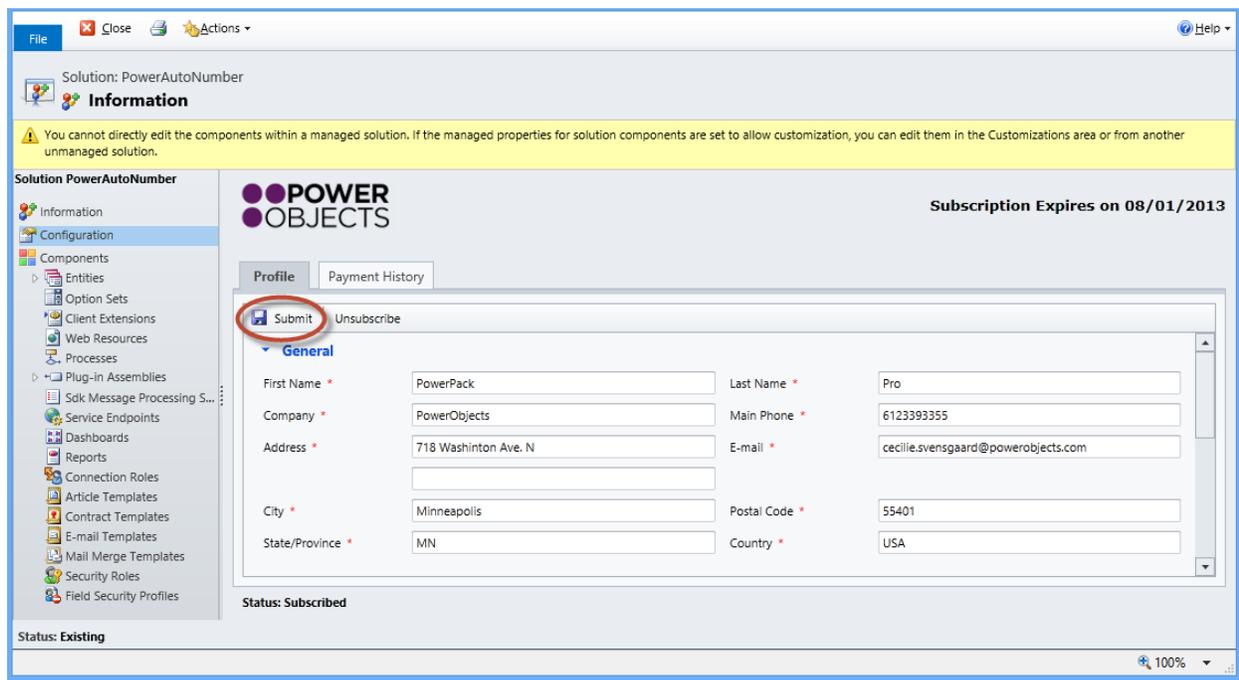


Once the solution is done importing, you will see a screen like the one below. The yellow bar along the top indicates that your solution has imported successfully. Click Close.



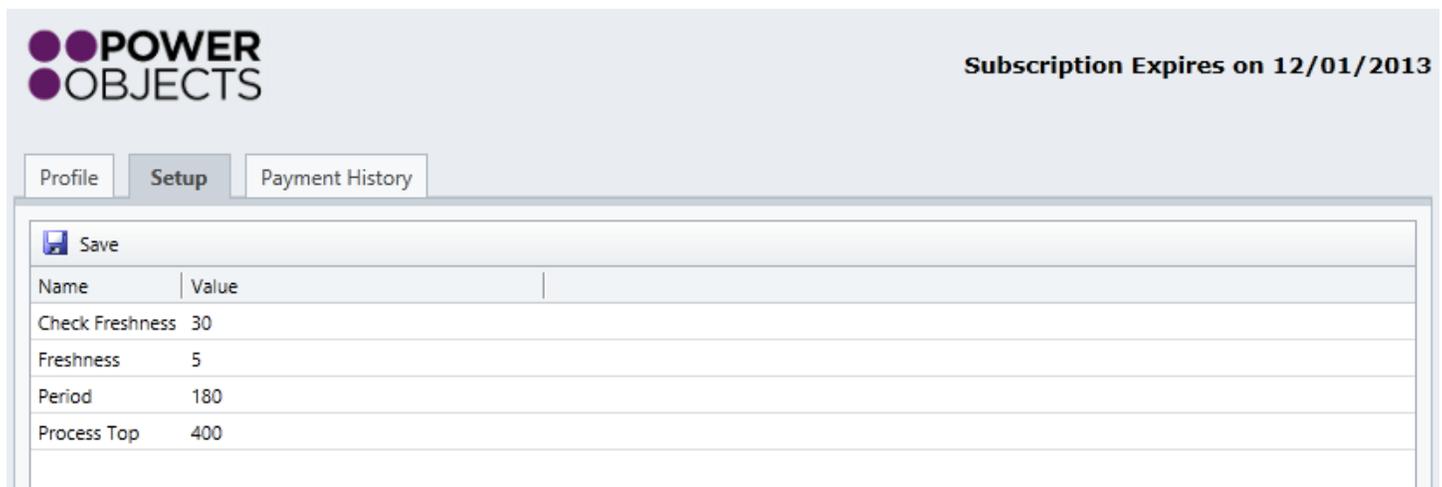
Registration

In the Solutions Window, double click on PowerScore. Fill in your information and click Submit. Be patient while the information is submitted.



Configuration

After you have filled out the profile area of PowerScore, navigate to the next tab over called Set-up.



In this tab, you will see four fields. These fields can be configured to best suit your needs.

Freshness

An individual person's score is updated each time a PowerScore is created, related to them. The contacts/leads without activity will have their score drop off over time. We don't want to check the entire database of contacts/leads for old scores every time a score-able activity happens. By setting a freshness value (in days), we know we need to check the database for old scores of those contacts/leads without recent transactions within that past x number of days. If the transactions on that record are older than the number of days defined in the "period" row, we will age them.

Period

This number (in days) tells us how long a particular score is valid. For example, if someone fills out a web form, that person gets a score. The period tells us how long that score is valid for. After the period, the score is no longer valid, and will not be included in the total score for that lead or contact.

Check Freshness

This is the number (in minutes) between freshness checks. For example, if we have not checked for records that are older than the freshness in the last 30 minutes, check now.

Process Top

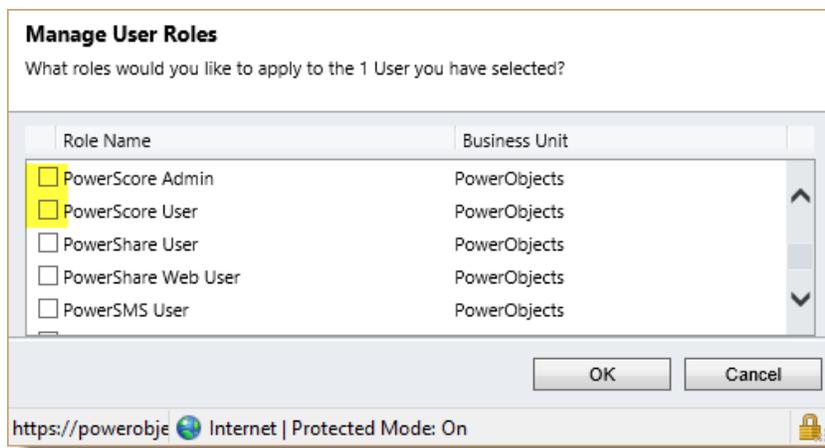
When we go through the database to update old scores (leads/contacts that haven't had any score transactions in the number of days defined in the freshness row), we may get a very large number of records. The number entered in the "process top" row, will be the number of records that are processed in each call.

Security Roles

In order for CRM users that are not system administrators to be able to use PowerScore, they will need to be assigned to one of the PowerScore security roles that are automatically imported into the CRM.

The PowerScore Admin security role will allow users to do everything related to PowerScore, including creating new scoring rules, and viewing scores.

The PowerScore User security role will allow users to view scores, but not to create new scoring rules.



Uninstalling PowerScore

To uninstall, first delete any PowerScore Rules you have created. Then uninstall as usual, by deleting the solution. Deleting the PowerScore Rules removes SDK Message Processing Steps that would otherwise block the uninstall.

Thanks for your interest in PowerScore. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of import. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged \$1/CRM user/month.

Note: PowerScore is free if you subscribe to two of any of the following add-ons: PowerMailChimp, PowerEmail, PowerSurvey, PowerWebForm, or PowerShare. To redeem your free credit for this add-on, contact the PowerPack Pro at powerpackpro@powerobjects.com.

Interested in more CRM tips and tricks? Check out [blog](#) or subscribe to our [newsletter](#).

