POWER OBJECTS

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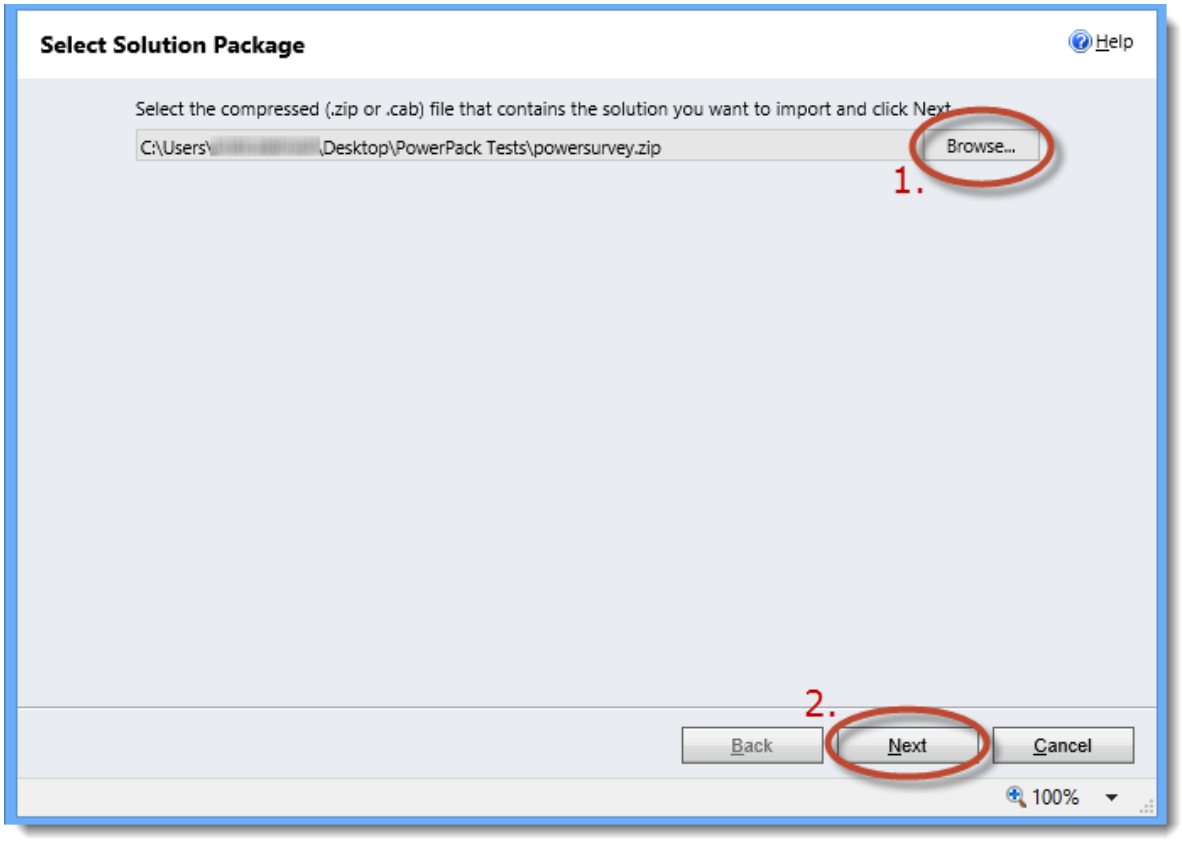
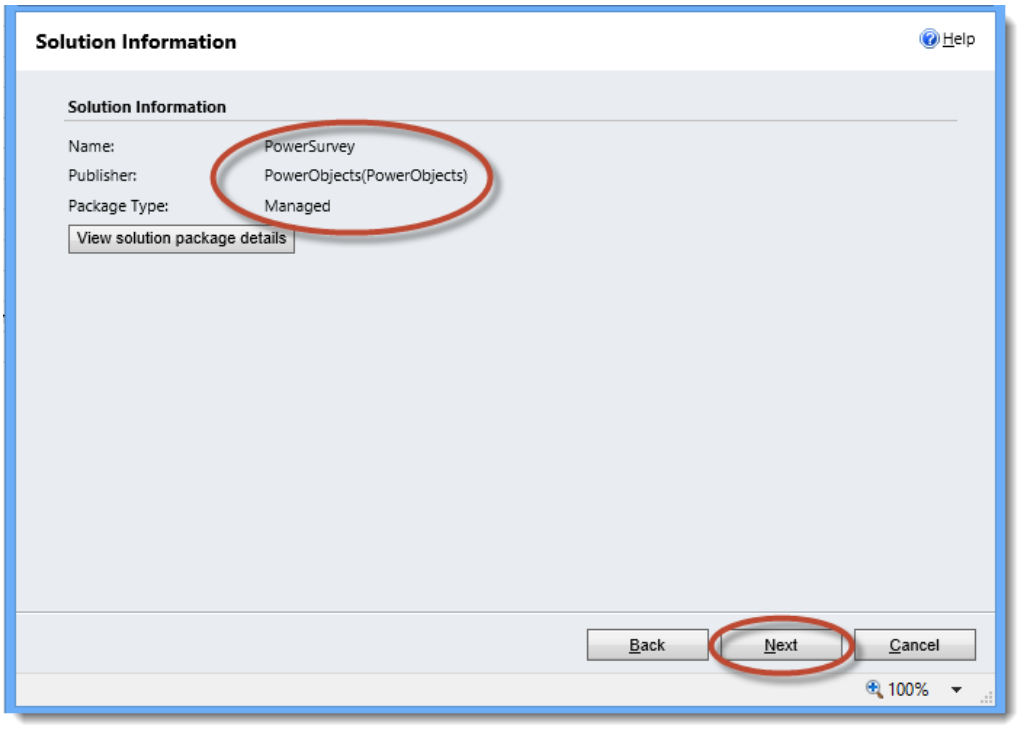
Import

The first step to installing any managed solution in Microsoft Dynamic 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 PowerSurvey 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.

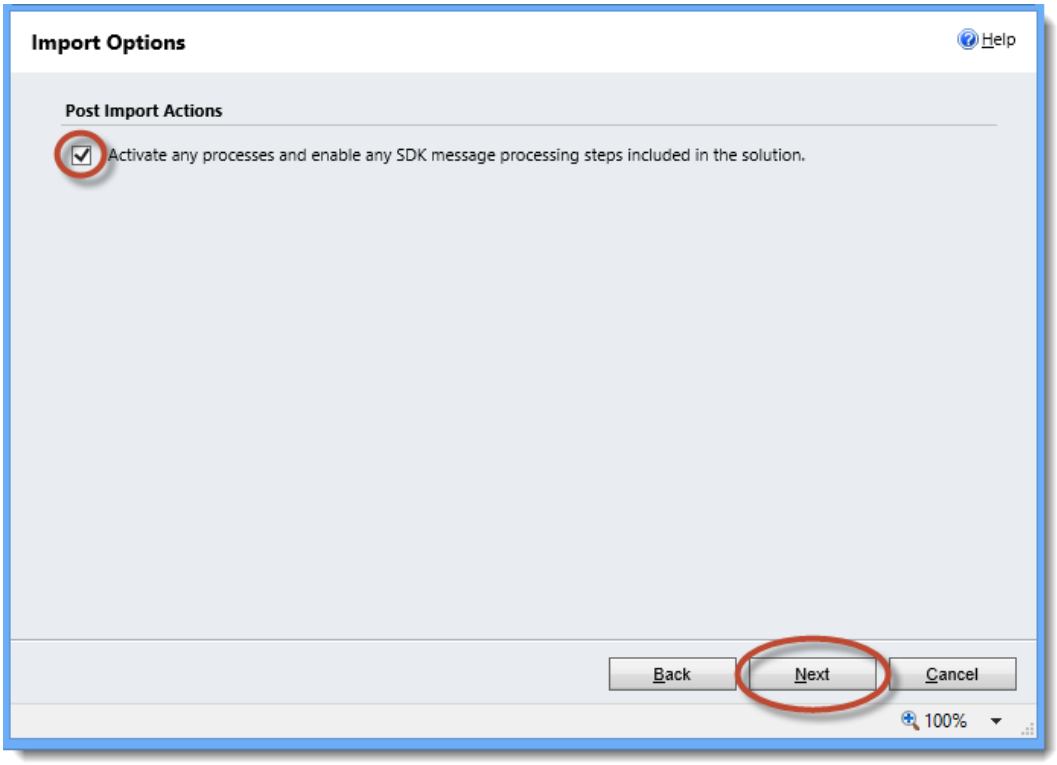


The next screen that opens up will show the Name / Publisher / Package Type of the solution you are installing. This screen should show PowerSurvey from PowerObjects.

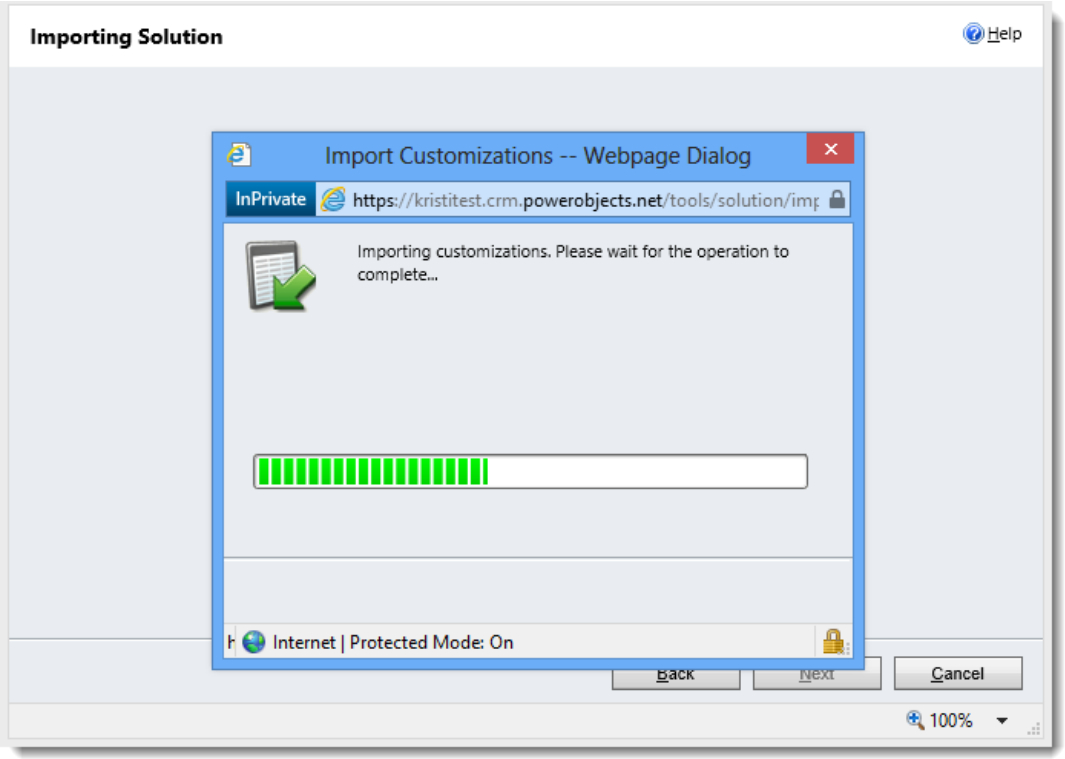


Click Next, and make sure to check the "Activate all processes…" checkbox, and click Next

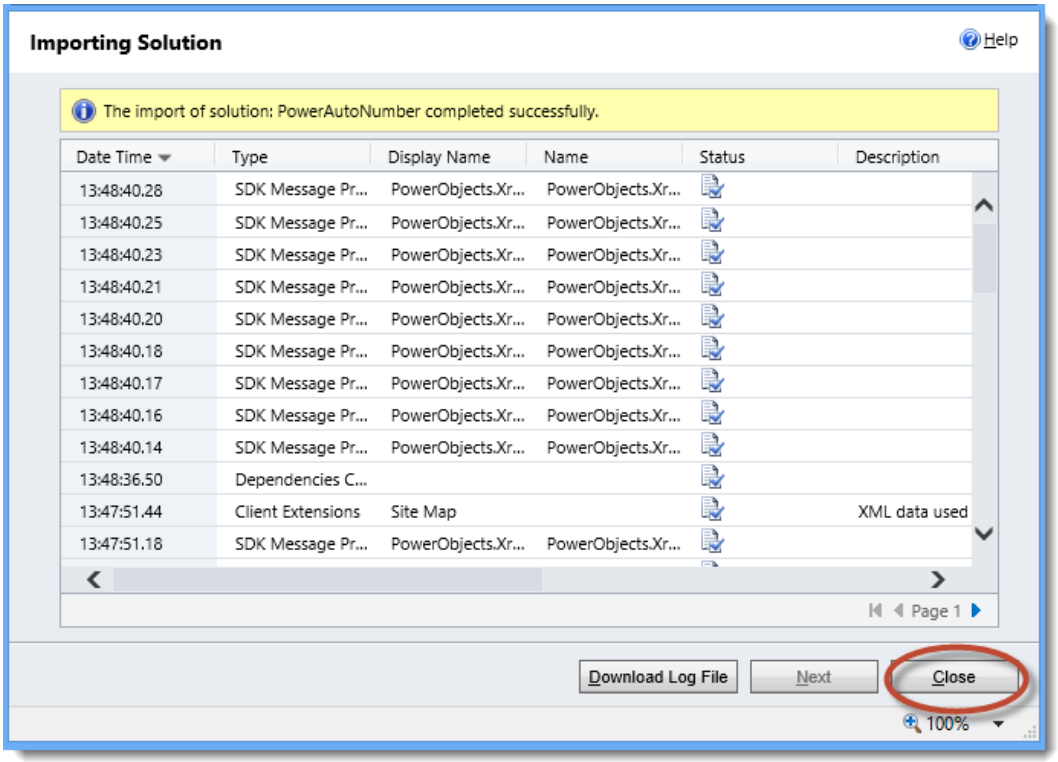
<u>IMPORTANT:</u> *If you do not check this box, the add-on* **WILL NOT FUNCTION CORRECTLY!**



A green progress indicator will display while the solution imports.

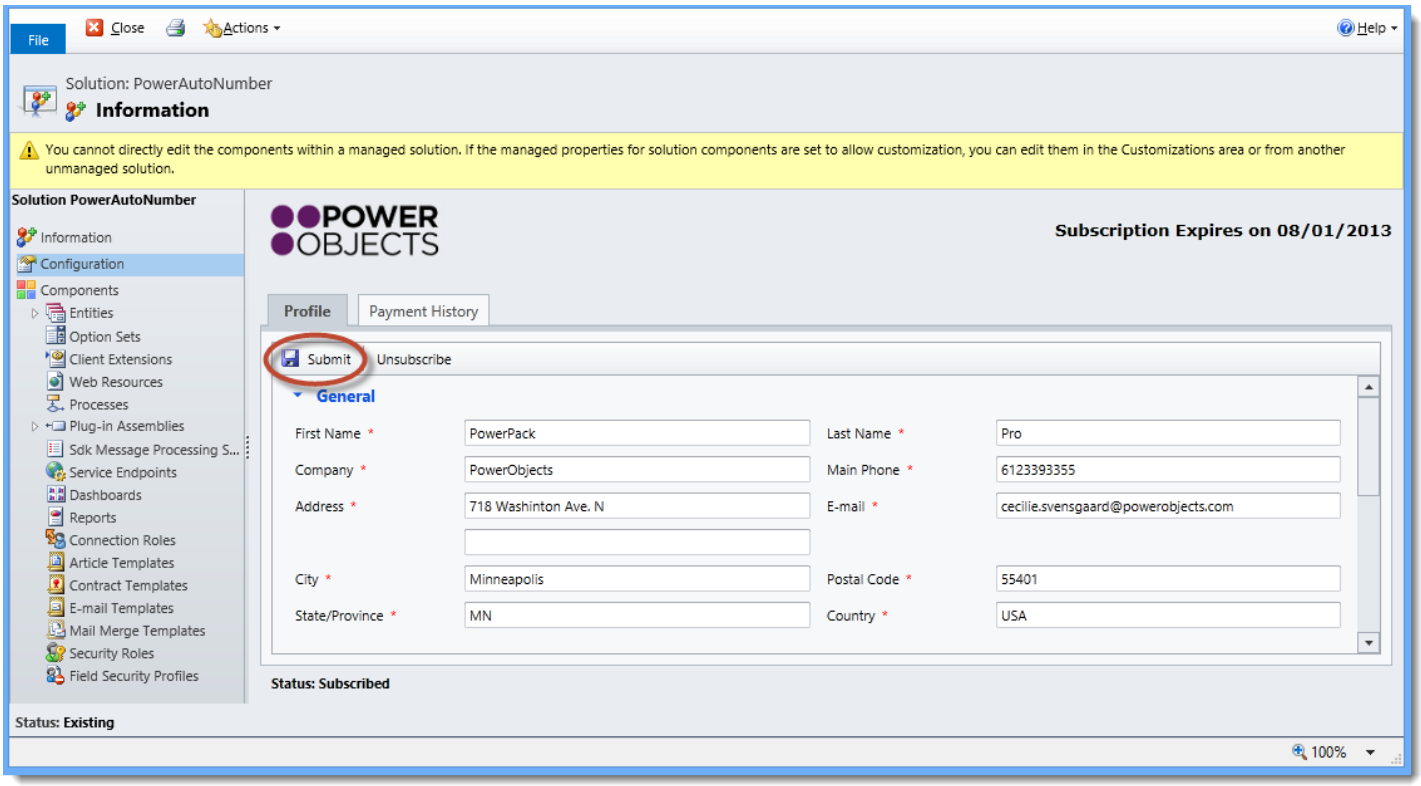


Once the solution is done importing, you will see a screen like the one below. The yellow bar along the top indicates that your solution has imported successfully. Click Close.



Register

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

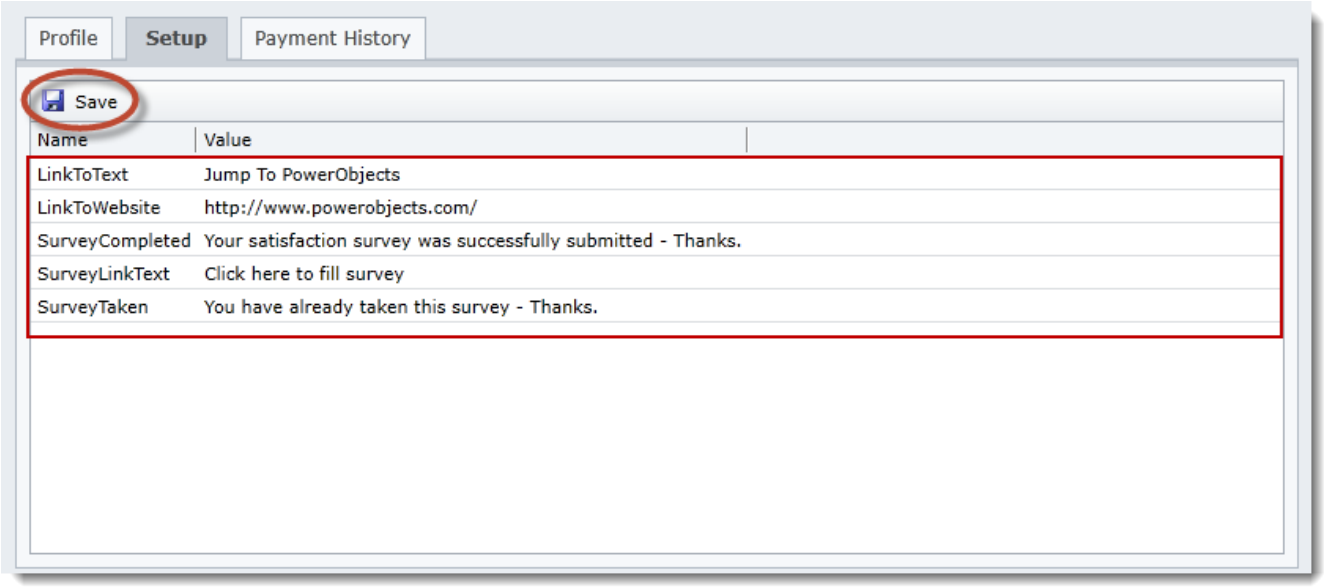


Configuring PowerSurvey

Next go to the setup tab and edit the default values of the following items, if you wish:

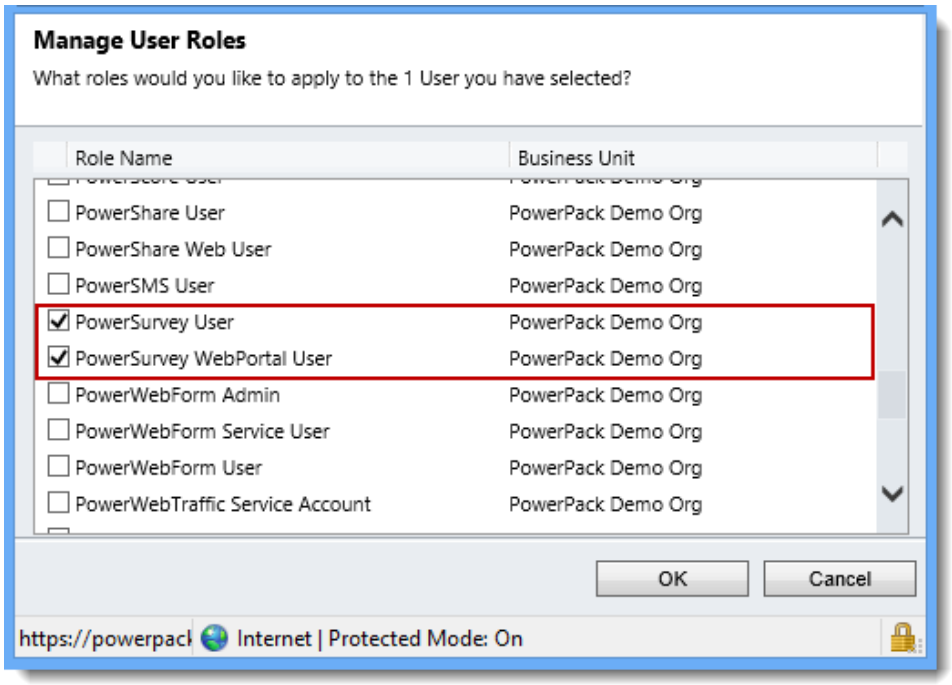
- Link To Text - Message on the button that is displayed once the survey is completed
- Link To Website - URL to go to if the button that displays after taking the survey is clicked
- SurveyCompleted - Message displayed once survey is submitted
- SurveyLinkText - Text for the hyper link in your email messages, that the survey submitter clicks to take the survey
- SurveyTaken - Message displayed if they click on the link in the email, and try to take the survey that's already been submitted, again

Once you have completed made your changes, click Save and close the window.



Security Roles

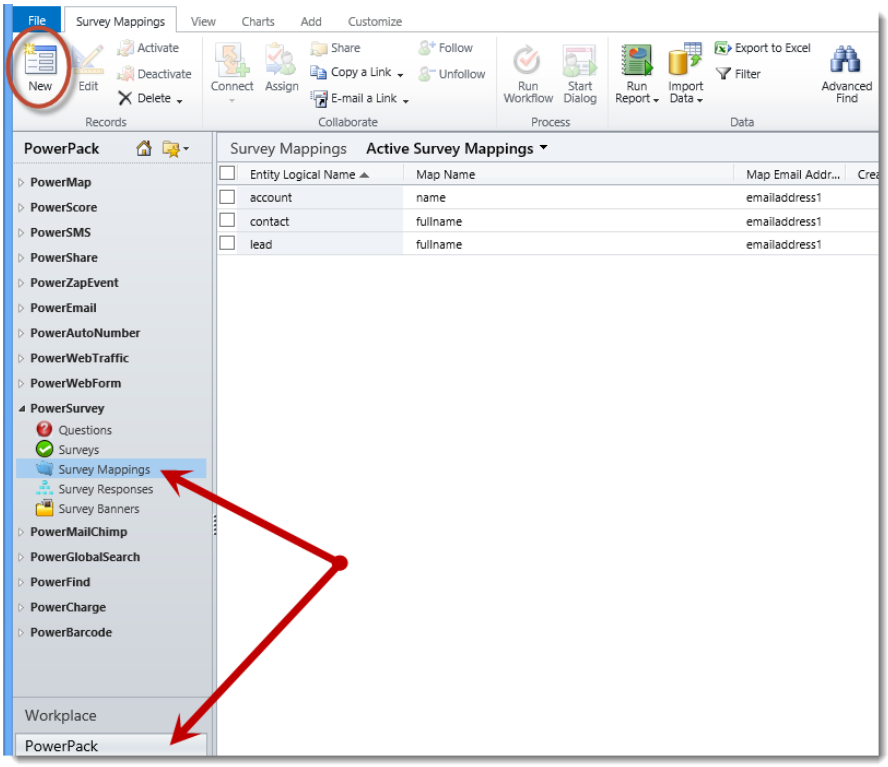
Every user who would like to have access to PowerSurvey will need the PowerSurvey User security role assigned to them. System Administrators will automatically see PowerSurvey in their left navigation, even without having the security role assigned. The PowerSurvey WebPortal User is meant to be assigned to the user that is entered in the PowerSurvey configuration screen, if that user is not a system admin.



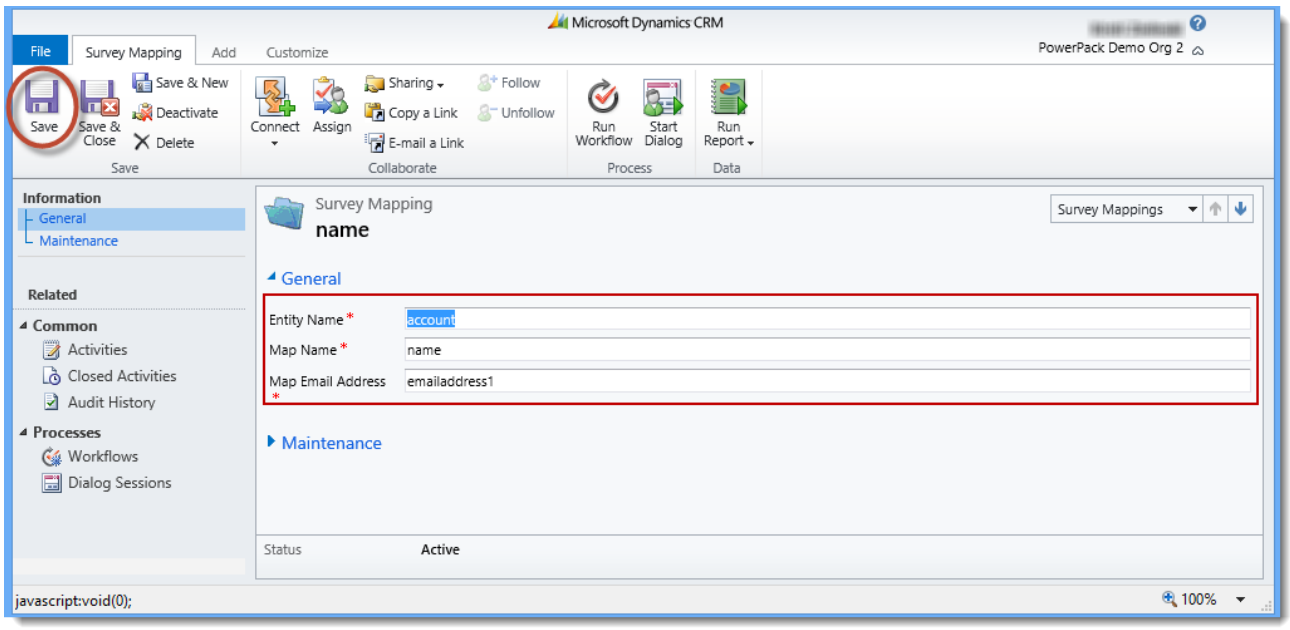
Survey Mappings

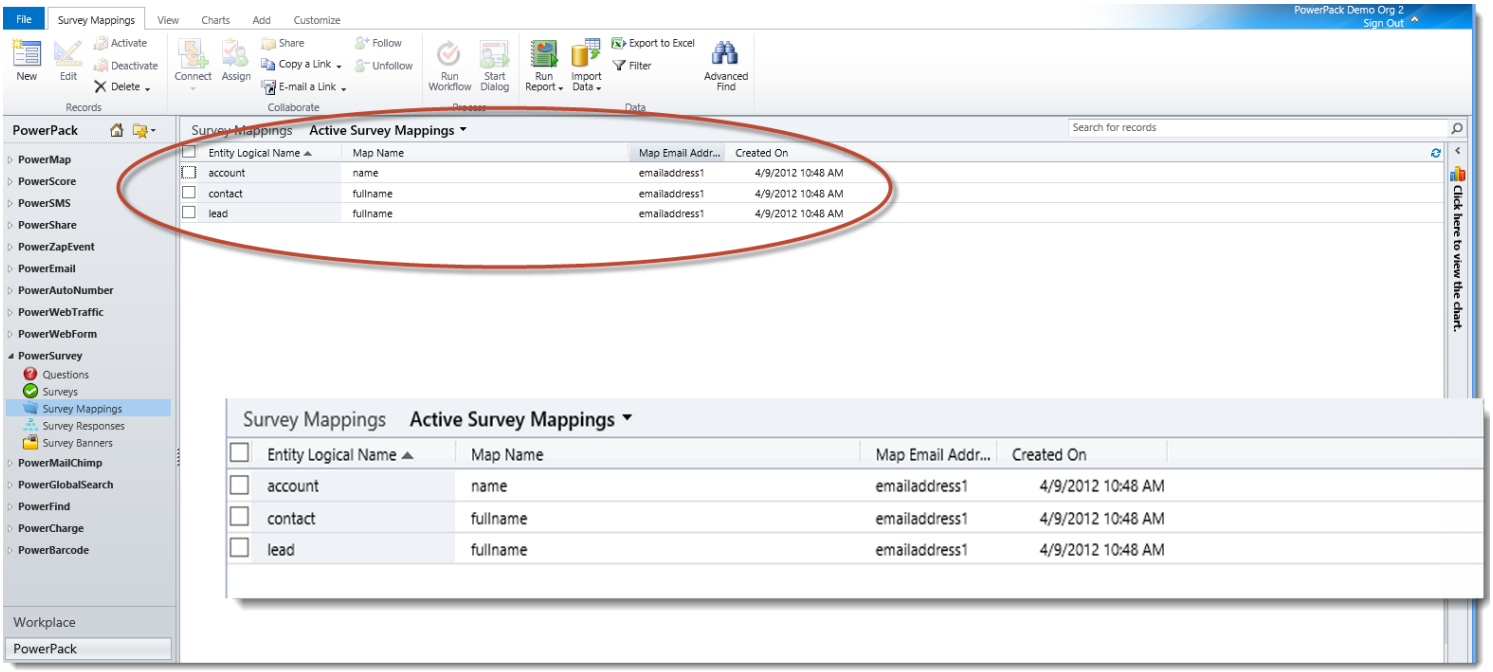
Next, refresh you CRM and go to the PowerPack tab. There you will see the new set of menu options for PowerSurvey. Choose Survey Mappings to finish your PowerSurvey configurations. If you would like to send surveys to any entity other than an Account, Contact or Lead, you will need to set up a Survey Mapping for that entity, so that PowerSurvey knows where to grab the email address from on that entity.

To set up a new survey mapping, click on Survey Mappings (under the PowerSurvey section).



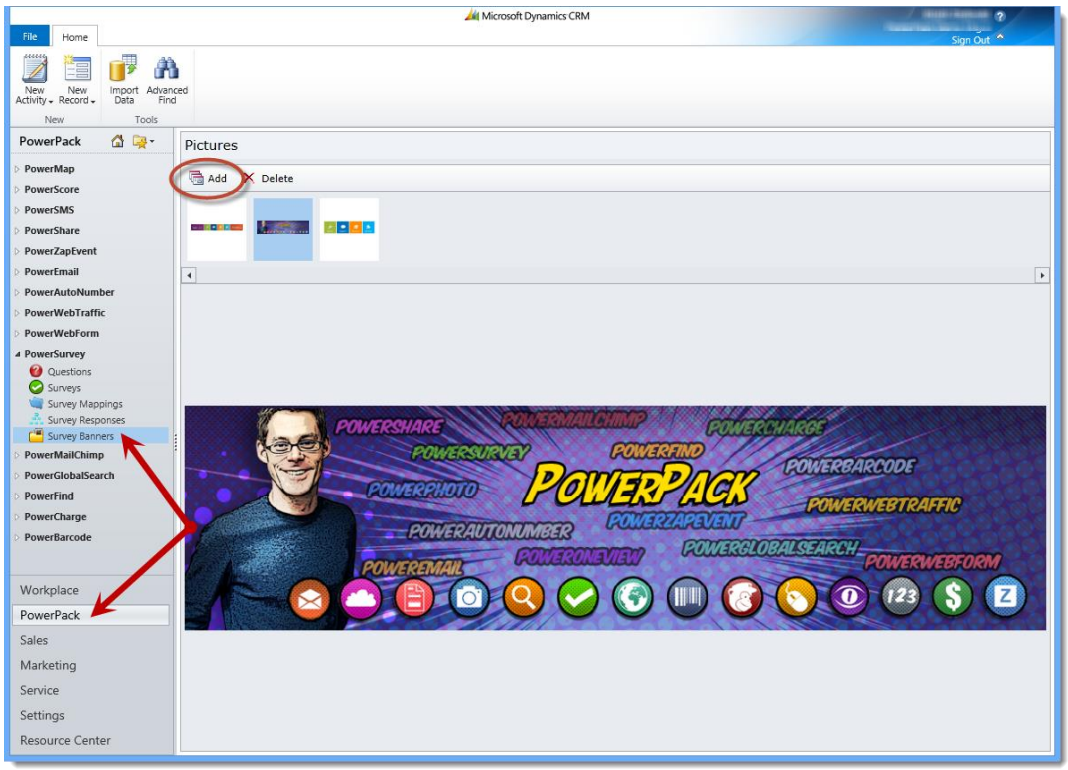
On the mapping, you will need to specify an Entity Name / Map Name / Map Email address for each mapping. These should be the technical names of the fields on the entity, not the display names.





Survey Banners

Once you've completed the survey mappings you can upload banners that will be used on your surveys. For each survey, you can choose a banner that will be displayed across the top of the survey. To add a survey banner, navigate to the "Survey Banners" area in CRM, and click "Add" at the top of the window. Then choose your survey banner. In order to display nicely at the top of the survey, the banner should be rectangular in shape.



Uninstalling PowerSurvey

To uninstall, first delete any PowerSurveys you have created. Then uninstall as usual, by deleting the solution.

Deleting the surveys and the solution will remove all surveys and survey responses from your CRM. If you would like to keep the survey data in your CRM, you can leave the PowerSurvey solution in your CRM, and simply unsubscribe from PowerSurvey.

Thanks for your interest in PowerSurvey. 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 $2/CRM user/month.

Interested in more CRM tips and tricks? Check out blog or subscribe to our newsletter.