



USER GUIDE

PowerSurvey

CRM 2013/2015



Service



Support



Education



Add-ons

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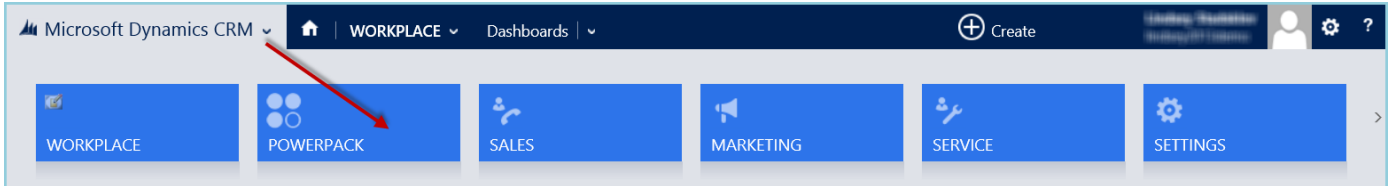
PowerSurvey Report Filtered by Contact



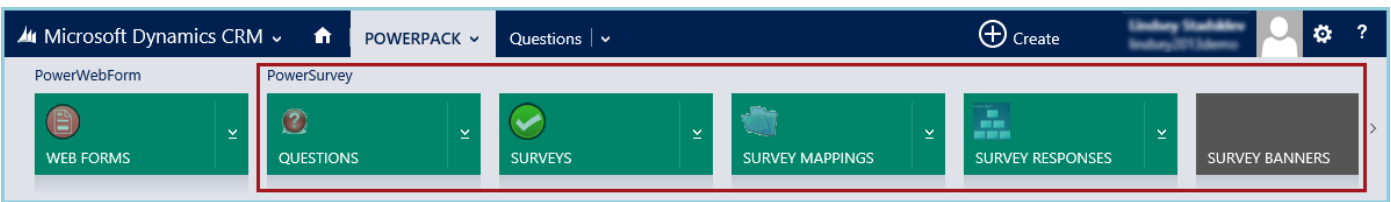
Overview

PowerSurvey has the functionality to build, configure, and send surveys from within CRM. As soon as a survey responder fills out the survey, responses are instantaneously collected back in CRM. With PowerSurvey, customers' responses can be viewed immediately. It is also possible to set up automatic notifications, so managers can be promptly notified if a low or high rating is received. This will allow for more proactive customer service, speedy response rates, and the best part is, you never have to leave CRM!

Once PowerSurvey has been installed, the PowerSurvey options can be found under the PowerPack tile.



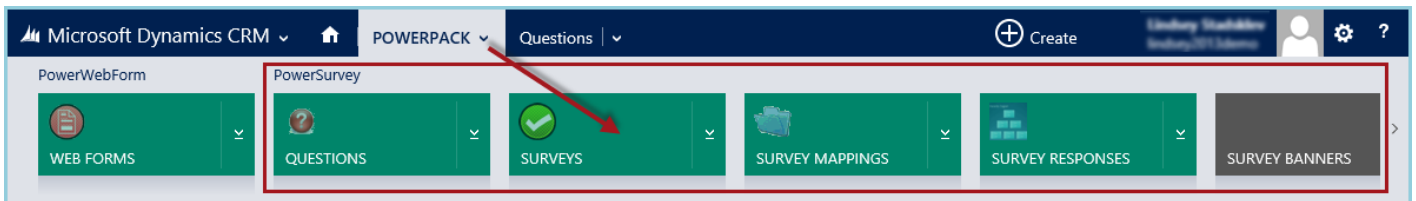
Under the PowerPack tab, new tiles have appeared under the PowerSurvey section: Questions, Surveys, Survey Mappings, Survey Responses, and Survey Banners.



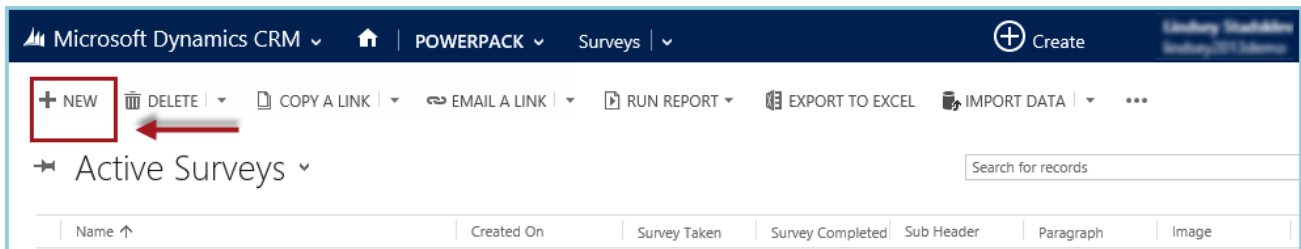
Creating a PowerSurvey

This section will go through the steps necessary to create a PowerSurvey. At any time during the creation of the survey, click on the Preview button in the upper navigation to launch a preview of the survey, and see what the end users will see when they go to fill out the survey.

First, navigate to the Surveys section of the PowerSurvey area.



Click on New.



Proceed to fill out the details of the Survey Form. When completed, press Save.

Survey Fields

Name

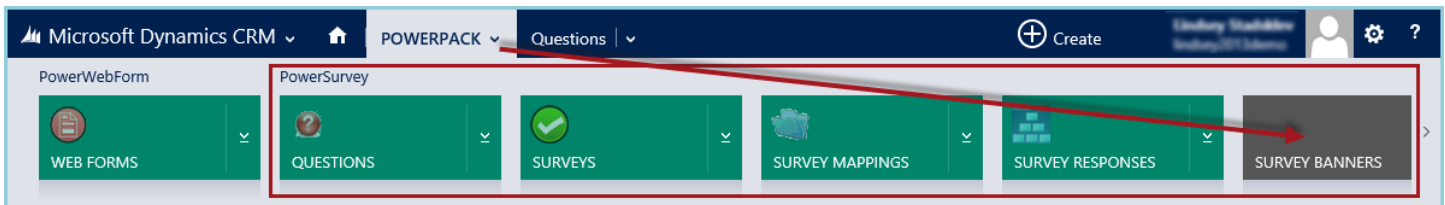
The Name field is a required field. It is the actual name of the survey in the CRM system. The survey should have a somewhat logical name as it will most likely need to be referenced in the future; it should also not be too complex as it will be used to programmatically call this survey. The name of the survey will be displayed at the top of the actual survey itself and will be seen by recipients.

Image

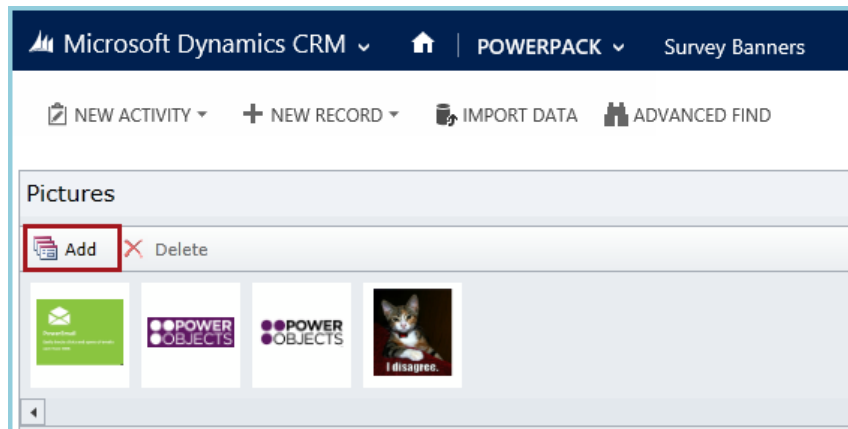
Choose a banner to add to the top portion of the survey for enhanced customization. The image will have to be already uploaded to the Survey Banners area.

Add an Image to the Banner Area

Navigate to Survey Banners.



Select Add.



Back on the Survey form, click Select Banner. Select the file to use as a banner image. The image will upload and may now be added to the body of the survey:

SURVEY : INFORMATION

PowerSurvey Add-On Survey

General

Name *	PowerSurvey Add-On Survey
Image	powerobjects-standard_1497x517.jpg
Greeting	Salutations {name}!
Header	Thank you for your interest in PowerSurvey!
Sub Header	Please tell us about your experience
Paragraph	PowerSurvey is one of our many add-ons that will increase the functionality of your CRM system.

←

Click on the photo that is to be added. A preview will be displayed in the window below the images. When the correct photo has been chosen, click Select.



Greeting

This greeting will be displayed at the top of the survey; welcoming survey takers to the survey. To insert the survey taker's name in the greeting, simply add the **{name}** token to the greeting. For example, if "Hello {name}!" is in the greeting field, it would read "Hello Joe CRM!" when Joe CRM takes the survey.

Header

To insert a header into the survey, input the desired text in this field. This will then be displayed in large font at the top of the survey, under the Greeting.

Sub-Header

This can be used for an additional title below the header; the font will render slightly smaller than the header font.

Paragraph

Any amount of lengthy text may be filled in and added at the top of the survey; beneath the Sub-Header. Often, surveys require instructions to complete; the paragraph field is a great place to put these directions.

Footer

The text entered in this field will be displayed at the very bottom of the survey.

Campaign

In order to have a campaign response created each time someone fills out a survey, choose to associate it with a campaign in this field.

Questions per Page

If left blank, by default, the survey will have 10 questions on each page; however, there may be more than 10 if desired. When a number is entered here, it will limit the number of questions on each page of the survey to the designated number.

Style Sheet (CSS)

In this section, choose a style sheet for the survey. This will help make the survey look professional and attractive. PowerObjects provides 5 different style sheets to choose from; the style sheets are either fixed width, or resizable, depending on the size of the screen the survey is being taken on.

Survey Link

The text in this field will become the text that will be hyperlinked to the survey page by replacing the long survey URL and is sent within the survey e-mail. This is pre-populated from the configuration of the solution, but can be changed on a per survey basis here.

Survey Completed

When a survey is completed, this text is displayed when the survey has been successfully submitted. This is pre-populated from the configuration of the solution, but can be changed on a per survey basis here.

Survey Taken

If the survey has already been taken, this is the text that will be displayed if the recipient attempts to take the survey again.

Link to Website

This URL will be placed underneath the Survey Completed text upon a successful survey submission. This is pre-populated from the configuration of the solution, but can be changed on a per survey basis here.

Link to Text

This text will be displayed in place of the URL that is in the Link to Website field when a survey is submitted. This is pre-populated from the configuration of the solution, but can be changed on a per survey basis here.

E-mail Submitted Survey To

To have the survey responses sent to a specific e-mail when they are received, enter the e-mail addresses in this field. The e-mail will look similar to the e-mail below:



Wed 9/17/2014 1:57 PM

Lindsey Stadskev <lindsey.stadskev@powerobjects.com>

PowerSurvey PowerObjects:00040045

To Lindsey Stadskev

Survey: Customer Service Survey

Regarding: Buffy Summers

Company Name: The Watcher's Council

Subject: PowerSurvey

Questions	Answers
What is your experience with CRM?	I have used it daily at work but haven't gone much beyond that.
Where did you hear about PowerSurvey?	I am a PowerSuccess subscriber. Add-ons are included for free and our PowerSuccess engineer recommended it as a solution to a business problem.
How has PowerSurvey benefited your business?	We are able to collect necessary feedback and information from the recipients of the surveys; it is quick and easily. Before, we had to call everyone.
Have you tried other add-ons?	Yes
How would you rate the usability of PowerSurvey?	10
Would you like someone to contact you with more information regarding PowerSurvey or other PowerPacks?	Yes



Note: An e-mail router must be configured in CRM in order for the survey response e-mails to be sent out.

Navigation Text

If there is more than one page to the survey, a Prior and Next button will be displayed. All surveys will have a Submit button. If left blank, the default options will be displayed on the survey (Prior, Next, and Submit); to change the displayed text, enter the preferred text in these fields.



POWERPACK Surveys PowerSurvey Add-...

Lindsey Stadsklev lindsey2013demo

+ NEW DEACTIVATE DELETE PREVIEW ASSIGN SHARE EMAIL A LINK

SURVEY : INFORMATION

PowerSurvey Add-On Survey

General

Name*	PowerSurvey Add-On Survey
Image	powerobjects-standard_1497x517.jpg Select Banner
Greeting	Salutations (name)!
Header	Thank you for your interest in PowerSurvey!
Sub Header	Please tell us about your experience
Paragraph	PowerSurvey is one of our many add-ons that will increase the functionality of your CRM system. Contact us if you need more information!
Footer	612-339-3355
Campaign	Join Us at PowerUp!
Question Per Page	10
Style Sheet(CSS)	Glitter (Fix)
Survey Link	Please click here to take an Awesome Survey!

Survey Completed

Survey Completed	Your satisfaction survey was successfully submitted - Thanks.
Survey Taken	You have already taken this survey - Thanks.
Link To Website	http://www.powerobjects.com/
Link To Text	Jump To PowerObjects
Email Submitted Sur	lindsey.stadsklev@powerobjects.com

Navigation Text

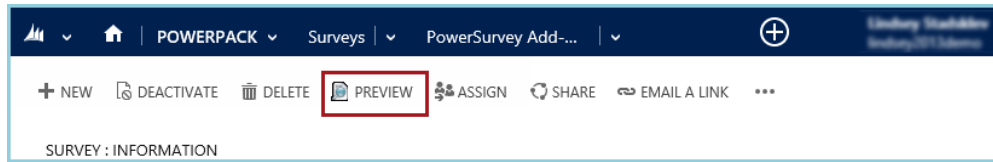
Prior	Back	Next	Forward
Submit	I'm Done!		

CSS

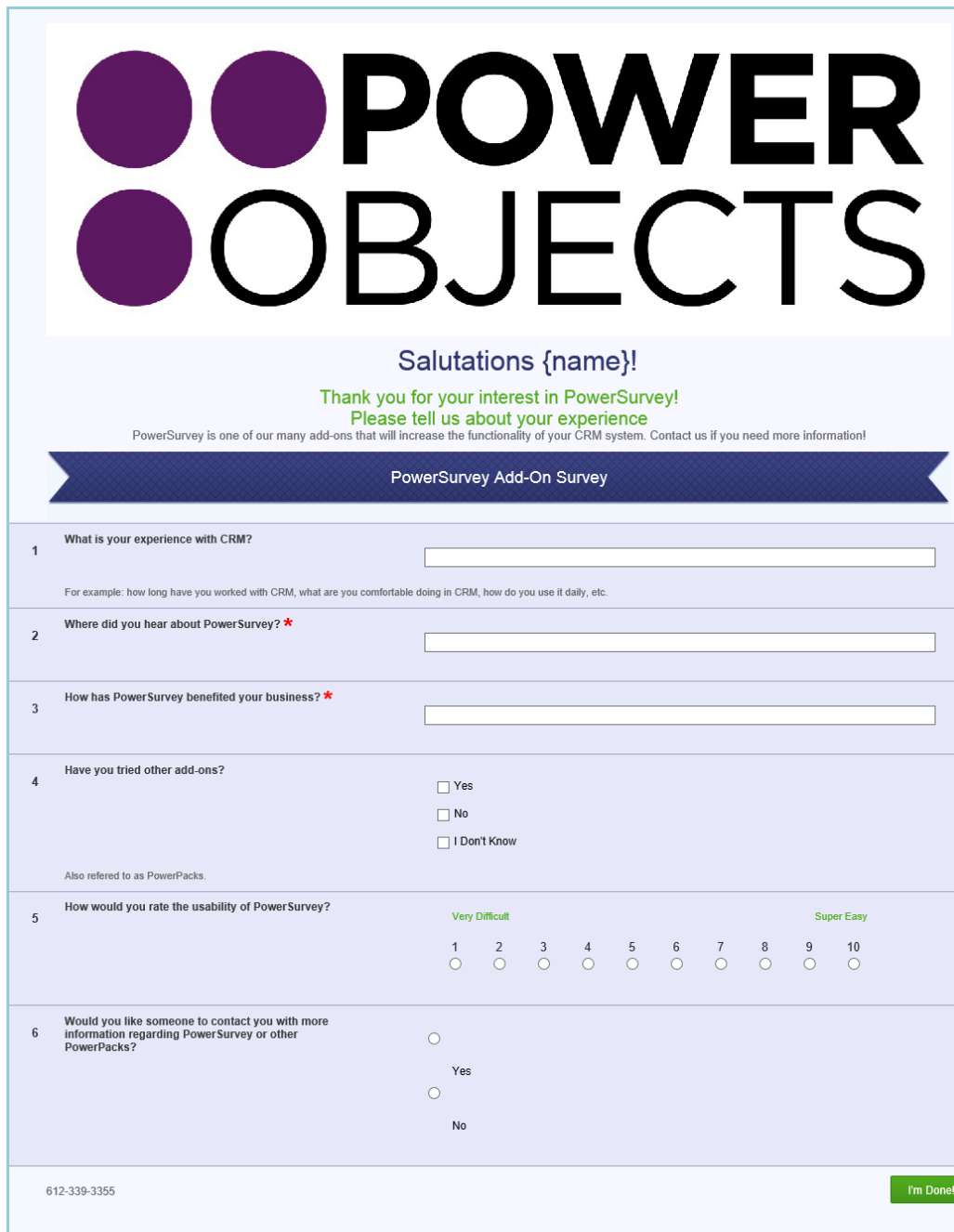
Upload a custom CSS here, or override parts of the default CSS that were selected a little further up on the form. This allows for further customization to the survey!

Preview

Once all the information has been entered and the survey has been saved, for your survey, it may be previewed. Click Preview to see how the survey webpage will be rendered.



Here is an example of a preview of the survey above:

A preview of a survey titled 'POWER OBJECTS'. The survey header features the logo 'POWER OBJECTS' with three purple circles to the left of the text. Below the logo, it says 'Salutations {name}!' and 'Thank you for your interest in PowerSurvey! Please tell us about your experience'. A sub-header reads 'PowerSurvey is one of our many add-ons that will increase the functionality of your CRM system. Contact us if you need more information!'. A dark blue banner below the header says 'PowerSurvey Add-On Survey'. The survey contains six questions:

1. What is your experience with CRM? (Text input field)
2. Where did you hear about PowerSurvey? * (Text input field)
3. How has PowerSurvey benefited your business? * (Text input field)
4. Have you tried other add-ons? (Radio buttons for Yes, No, I Don't Know)
5. How would you rate the usability of PowerSurvey? (Scale from 1 to 10, with 'Very Difficult' at 1 and 'Super Easy' at 10)
6. Would you like someone to contact you with more information regarding PowerSurvey or other PowerPacks? (Radio buttons for Yes, No)

At the bottom left, the phone number '612-339-3355' is displayed. At the bottom right, there is a green button labeled 'I'm Done!'.

Note: The {name} token will be automatically populated once the survey recipients have been selected.

Adding Questions to a Survey

In order to add questions to the survey, the basic survey information must be filled out and saved. Once the basic survey information is setup, questions may now be added!

There are three different ways to add questions to surveys: through the Survey Questions sub-grid on the general survey form, through the top navigation ribbon, or through the Questions tile.

Question Types

Check Box

A checkbox is used when a question requires two or more answers. The check boxes may be left checked or unchecked. This question cannot be made required as, by default, it always starts with the "unchecked" value.

Clock Time

A Clock Time question would be used if an answer requires a.m. or p.m.; or if the answer needs to be in hours and/or minutes. The clock time question is displayed in a 12 hour format; not a 24 hour format.

Date

A date question would be used when looking for an answer that requires the entry of a particular day.

Dollar

A dollar question would be used when looking for an answer in dollars and cents. This question is, by default, asking for US dollars (Example: \$34.54).

Drop-down List

Dropdown lists are used when there are multiple choices and the respondent can only choose one. Enter one answer choice per line.

Multi-line Text Box

Multi-line text boxes are used when looking for an answer that would allow the respondent to type free form text of typically a sentence or more. If you choose a multiline textbox as the question type, respondents will have the ability to input up to 4,000 characters.

Multiple Check Box

Multiple check box question types are used when there are multiple answers and the respondent can choose more than one. For the answer choices, list one per line.

Numeric

A numeric question would be used if looking for an answer with a numeric value.

Radio Button

A radio button question is used when there are multiple answers but only 1 answer can be chosen. List the options in the Choices text box one answer per line.

Rating 1 – 10

This type of question should be used to return a numerical answer with a value of 1-10. Remember to add the Low and High description – this will minimize confusion on what a 1 means, and what a 10 means when people answer the question.

Note: PowerSurvey Rating 1-10 questions cannot be changed to 1-7 or 1-5. 1-10 is the only rating question type available within PowerSurvey.

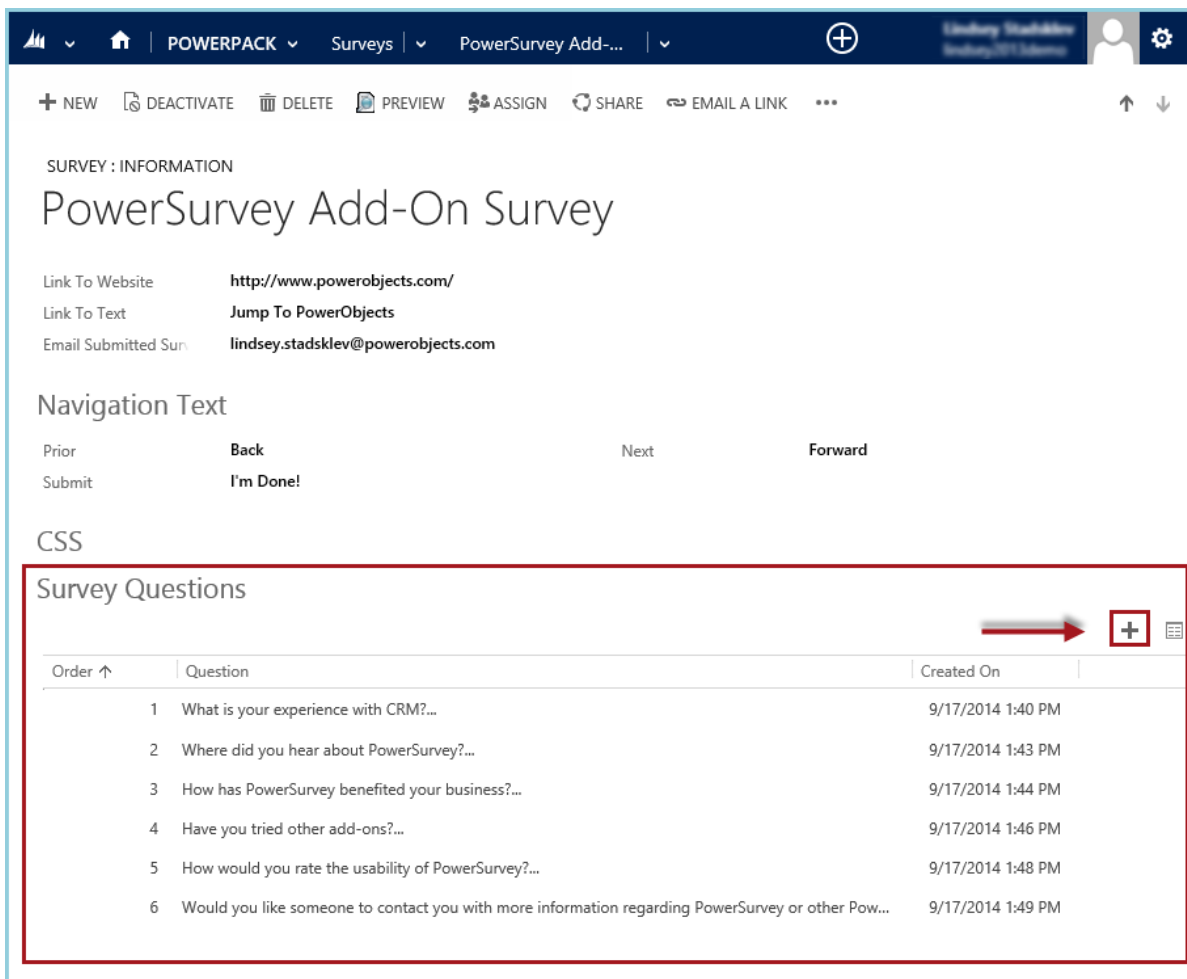
Stop Watch

The stop watch time question would be used when looking for an answer in hours, minutes and seconds. (Similar to the display of a stop watch).

Text Box

Use a text box when looking for a short free text answer to a question.

Add a Survey Question through the Survey Sub-Grid from Survey Form
In order to add questions to the Survey, open the particular survey that the questions will be added to.
Scroll down the survey form to Survey Questions. To add a new question, click the plus sign.



The screenshot shows the 'PowerSurvey Add-On Survey' interface. At the top, there is a navigation bar with 'POWERPACK', 'Surveys', and 'PowerSurvey Add-...' dropdowns. Below the navigation bar, there are action buttons: '+ NEW', 'DEACTIVATE', 'DELETE', 'PREVIEW', 'ASSIGN', 'SHARE', and 'EMAIL A LINK'. The main content area is titled 'SURVEY : INFORMATION' and 'PowerSurvey Add-On Survey'. It includes fields for 'Link To Website' (http://www.powerobjects.com/), 'Link To Text' (Jump To PowerObjects), and 'Email Submitted Sur...' (lindsey.stadsklev@powerobjects.com). Below this is a 'Navigation Text' section with buttons for 'Prior', 'Back', 'Next', 'Forward', and 'Submit' (I'm Done!). The 'CSS' section is empty. The 'Survey Questions' section is highlighted with a red box and contains a table with 6 rows of questions. A red arrow points to a plus sign icon in the top right corner of the table, indicating where to click to add a new question.

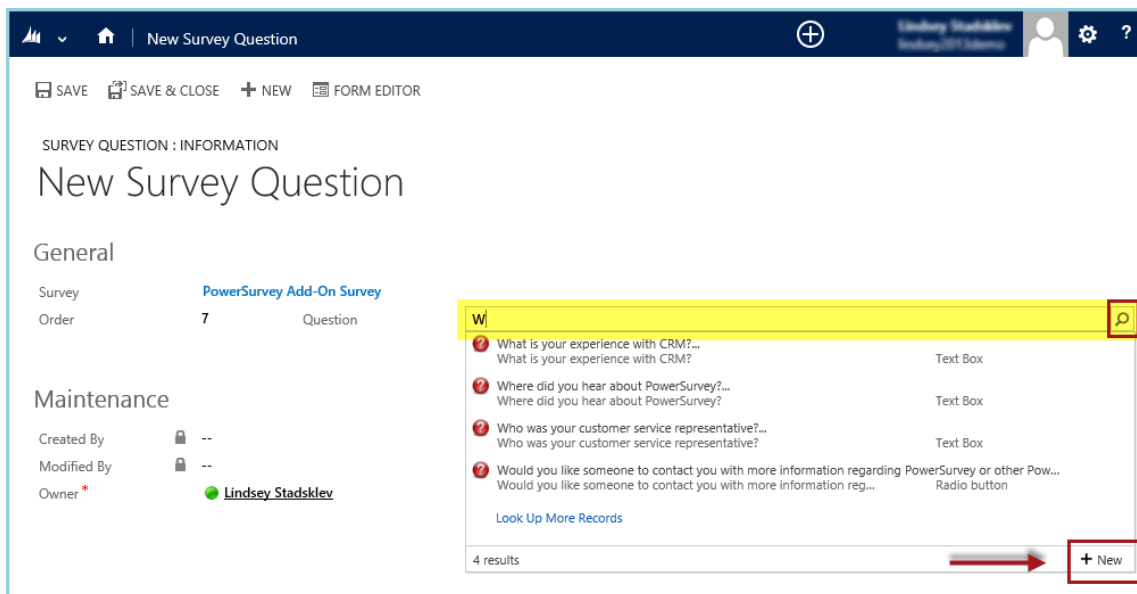
Order ↑	Question	Created On
1	What is your experience with CRM?...	9/17/2014 1:40 PM
2	Where did you hear about PowerSurvey?...	9/17/2014 1:43 PM
3	How has PowerSurvey benefited your business?...	9/17/2014 1:44 PM
4	Have you tried other add-ons?...	9/17/2014 1:46 PM
5	How would you rate the usability of PowerSurvey?...	9/17/2014 1:48 PM
6	Would you like someone to contact you with more information regarding PowerSurvey or other Pow...	9/17/2014 1:49 PM

A new window will appear to add a question to a survey. By default, when opened from the Survey Questions sub-grid, the questions will be added to the survey that is currently open. To change this, click on the magnifying glass on the Survey field.

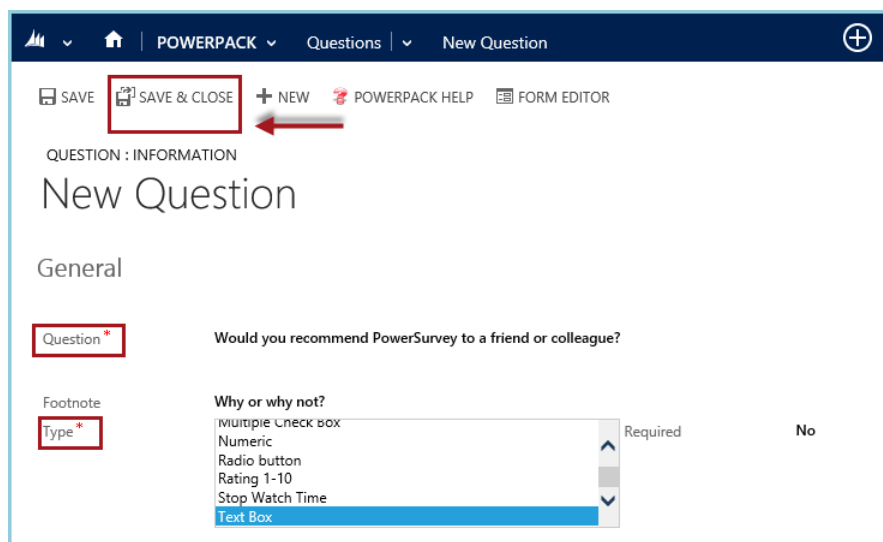


Set the Order the question will read on the survey; these numbers just need to be in chronological order. The lowest number will be the first question displayed on the survey.

In the Question field, there are two options: To add a question that has been previously created in the Questions section (under the PowerPack tile) or create a new question right now. All questions created either directly through the questions section or by creating a new question on the fly will be saved in the Question Bank for future use on any survey. In this example, a new question will be created; Select New.



Within the question window, a number of fields will be displayed – Question, Footnote, Type, and Required. Fill in the details as necessary. Save & Close.



The initial question window will appear after the question has been added. PowerSurvey has now filled in the question field with the newly created question. From this screen, hit Save and Close.

SAVE **SAVE & CLOSE** **+ NEW** **FORM EDITOR**

SURVEY QUESTION : INFORMATION

New Survey Question

General

Survey	PowerSurvey Add-On Survey
Order	7
Question	Would you recommend PowerSurvey to a friend or colleague?...

Maintenance

Created By	🔒 --	Created On	🔒 --
Modified By	🔒 --	Modified On	🔒 --
Owner*	Lindsey Stadsklev		

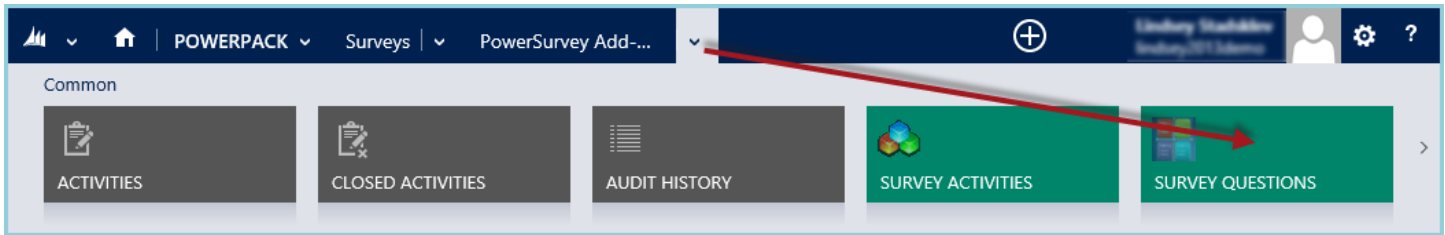
The Question has now been added to the survey and will be displayed in the Survey Questions view.

Survey Questions

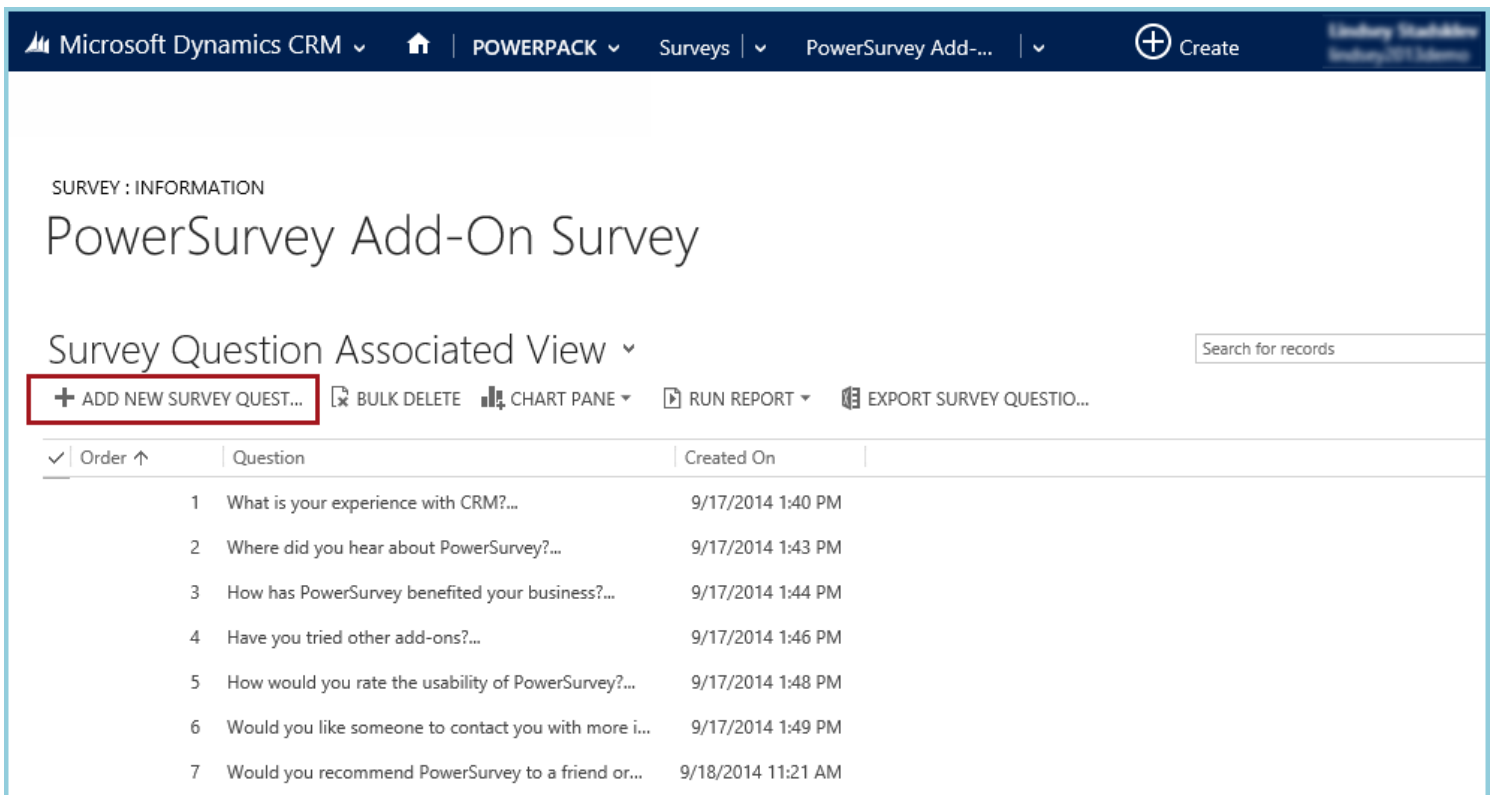
Order ↑	Question	Created On
1	What is your experience with CRM?...	9/17/2014 1:40...
2	Where did you hear about PowerSurvey?...	9/17/2014 1:43...
3	How has PowerSurvey benefited your business?...	9/17/2014 1:44...
4	Have you tried other add-ons?...	9/17/2014 1:46...
5	How would you rate the usability of PowerSurvey?...	9/17/2014 1:48...
6	Would you like someone to contact you with more information regarding PowerSurvey or other Pow...	9/17/2014 1:49...
7	Would you recommend PowerSurvey to a friend or colleague?...	9/18/2014 11:2...

Add a Survey Question via Navigation Ribbon from Survey Form

In order to add questions to a Survey, open the particular survey that needs questions. Hover over the drop down arrow next to the Survey and select Survey Questions.



Click Add New Survey Question.



A new window will appear to add a question to a survey. By default, when opened from the Survey Questions via the navigation ribbon, the questions will be added to the survey that is currently open. To change this, click on the magnifying glass on the Survey field.



Set the order the question will read on the survey. These numbers just need to be in chronological order to be ordered. The lowest number will be the first question displayed on the survey.

In the Question field, there are two options: To add a question that has been previously created in the Questions section (under the PowerPack tile) or create a new question right now. All questions created either directly through the questions section or by creating a new question on the fly will be saved in the Question Bank for future use on any survey.

SAVE SAVE & CLOSE + NEW FORM EDITOR

SURVEY QUESTION : INFORMATION

New Survey Question

General

Survey **PowerSurvey Add-On Survey**

Order 8 Question

Maintenance

Created By --

Modified By --

Is there

Is there other functionality you would like added to PowerSurvey? If so, what?...

Is there other functionality you would like added to PowerSurvey? If... Multiline Textbox

Look Up More Records

1 result + New

Modified On --

Begin by typing the question text in the Question field. Select the desired question from the list. If the question is not there, it is possible to create a new one at this time. Reference Adding a Question via Question Sub-Grid to create a new question. After the correct question has been selected, hit Save & Close.

SAVE SAVE & CLOSE + NEW FORM EDITOR

SURVEY QUESTION : INFORMATION

New Survey Question

General

Survey **PowerSurvey Add-On Survey**

Order 8 Question **Is there other functionality you would like added to PowerSurvey? If so, what?...**

Maintenance

The question will be added to the survey and will also show up on the Survey Question Associated View under the Survey Questions tile.

Survey Question Associated View

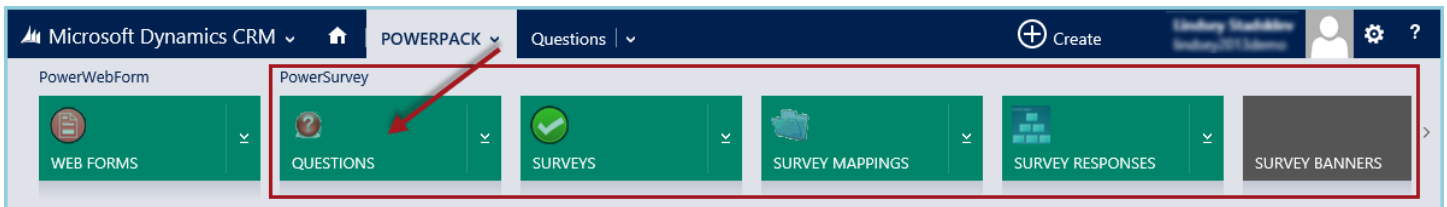
[+ ADD NEW SURVEY QUEST...](#)
[BULK DELETE](#)
[CHART PANE](#)
[RUN REPORT](#)
[EXPORT SURVEY QUESTIO...](#)

Order	Question	Created On
1	What is your experience with CRM?...	9/17/2014 1:40 PM
2	Where did you hear about PowerSurvey?...	9/17/2014 1:43 PM
3	How has PowerSurvey benefited your business?...	9/17/2014 1:44 PM
4	Have you tried other add-ons?...	9/17/2014 1:46 PM
5	How would you rate the usability of PowerSurvey?...	9/17/2014 1:48 PM
6	Would you like someone to contact you with more information regarding PowerSurvey?...	9/17/2014 1:49 PM
7	Would you recommend PowerSurvey to a friend or colleague?...	9/18/2014 11:21...
8	Is there other functionality you would like added to PowerSurvey? If so, what?...	9/18/2014 2:21 PM

Add a Survey Question through the Question Tile

We will not be adding this question from the survey form. We must navigate to a different section of PowerSurvey: Questions.

Navigate to Questions.



This view will display all active questions that have been created in CRM. This is a bank of all questions that have been created. It is possible to create multiple questions here for different surveys. They can be reused and used across different surveys.

To create a question, select New.

The screenshot shows the 'Active Survey Questions' view. The '+ NEW' button is highlighted with a red box and a red arrow. The table below lists various survey questions with their details.

Question	Type	Choices	Allow...	Display...	Footnote	High Number...	Low Number...	Required	Created On...
Who was your customer service representative?	Text Box		No					Yes	8/22/2014...
How would you rate your experience dealing with your representative?	Dropdown list	1 2 3 4 5 6 7 8 9...	No		On a scale of 1 t...			Yes	8/22/2014...
What is your experience with CRM?	Text Box		No		For example: ho...			No	9/16/2014...
How would you rate the experience you had at our restaurant?	Rating 1-10		No			AWEEEEESOME	BAD	No	9/17/2014...
Where did you hear about PowerSurvey?	Text Box		No					Yes	9/17/2014...
How has PowerSurvey benefited your business?	Text Box		No					Yes	9/17/2014...
Have you tried other add-ons?	Multiple Check...	Yes No I Don't K...	No		Also referred to a...			No	9/17/2014...
How would you rate the usability of PowerSurvey?	Rating 1-10		No			Super Easy	Very Difficult	No	9/17/2014...
Would you like someone to contact you with more information regarding Powe...	Radio button	Yes No	No					No	9/17/2014...
Would you recommend PowerSurvey to a friend or colleague?	Text Box		No		Why or why not?			No	9/18/2014...
Is there other functionality you would like added to PowerSurvey? If so, what?	Multiline Textbox		No		what more woul...			No	9/18/2014...

Proceed to fill out the details: Question, Footnote, Type, Choices, and Required. When satisfied with the question, select Save & Close.

POWERPACK Questions New Question

SAVE SAVE & CLOSE NEW POWERPACK HELP FORM EDITOR

QUESTION : INFORMATION

New Question

General

Question * **Did you know you can associate the PowerSurvey to a campaign?**

Footnote **Or create a new one on the fly!**

Type * **Radio button** Required **No**

Choices **Yes**
No

The question will now appear in the Question Bank of the Questions section.

Active Survey Questions Search for records

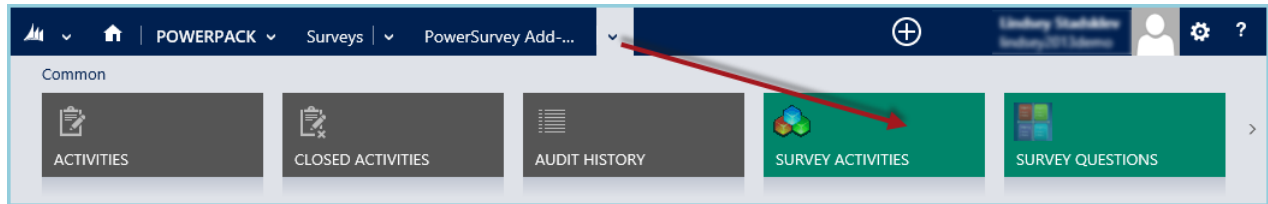
Question	Type	Choices	Allow...	Display...	Footnote	High Number...	Low Number...	Required
Who was your customer service representative?	Text Box		No					Yes
How would you rate your experience dealing with your representative?	Dropdown list	1 2 3 4 5 6 7 8 9...	No		On a scale of 1 t...			Yes
What is your experience with CRM?	Text Box		No		For example: ho...			No
How would you rate the experience you had at our restaurant?	Rating 1-10		No			AWEEEEESOME	BAD	No
Where did you hear about PowerSurvey?	Text Box		No					Yes
How has PowerSurvey benefited your business?	Text Box		No					Yes
Have you tried other add-ons?	Multiple Check...	Yes No I Don't K...	No		Also referred to a...			No
How would you rate the usability of PowerSurvey?	Rating 1-10		No			Super Easy	Very Difficult	No
Would you like someone to contact you with more information regarding Powe...	Radio button	Yes No	No					No
Would you recommend PowerSurvey to a friend or colleague?	Text Box		No		Why or why not?			No
Is there other functionality you would like added to PowerSurvey? If so, what?	Multiline Textbox		No		what more woul...			No
Did you know you can associate the PowerSurvey to a campaign?	Radio button	Yes No	No		Or create a new...			No

Sending PowerSurveys

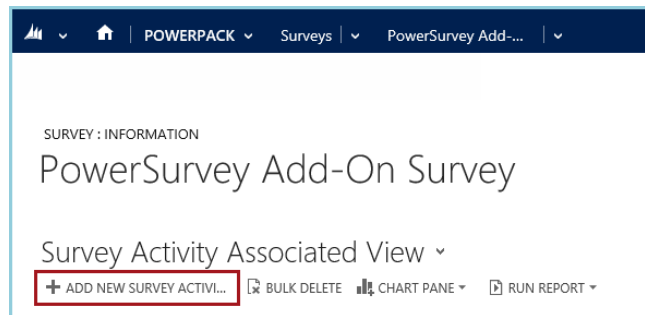
PowerObjects has attempted to make PowerSurvey as robust as possible to accommodate all possible scenarios for sending surveys. Typically surveys will either be sent to one individual at a time, sent to a group, or filled out over the phone. The options are all listed in this section.

Individual –Via Survey Activity

Navigate to Survey Activities from the dropdown arrow on the Survey form.



Select Add New Survey Activity.



This will bring up a window to create a New Survey Activity. It is the essentially the equivalent of sending an e-mail but you will have to define the regarding field. Once this field is defined the fields for Name, E-mail, and the Survey link will be automatically populated.

From there you will need to fill out the necessary details of the e-mail. The fields Subject field and Email Body. Please note that if you would like the survey link to render in a specific spot within the email body, you will have to type the token `|powersurvey|`, this will then be converted to a hyperlink once the email is sent. If you do not define a token within the body of the email, the link to the survey will be at the end of the email (shown in the example below).

New Survey Activity

SAVE SAVE & CLOSE POWERPACK HELP FORM EDITOR

SURVEY ACTIVITY : INFORMATION

New Survey Activity

General

Regarding **Buffy Summers**

Survey **PowerSurvey Add-On Survey**

Survey Sent -- Survey Completed --

Email

To Email **lindsey.stadsklev@powerobjects.com** To Name **Buffy Summers**

Subject **Tell us why you love PowerSurvey!**

B *I* U ABC Paragraph Font family Font size

Good Afternoon Buffy!

We hope you are enjoying PowerSurvey! We would appreciate your feedback in regards to your experience with this product and your success and troubles along the way. If you need any assistance or have any questions, shoot us an email at powerpackpro@powerobjects.com. Thank you for your help and have a wonderful day!

Jill CRM

The e-mail will appear similar to as follows:

Thu 9/18/2014 5:19 PM

Lindsey Stadsklev <lindsey.stadsklev@powerobjects.com>

Tell us why you love PowerSurvey! PowerObjects:00040046

To **Lindsey Stadsklev**

Good Afternoon Buffy!

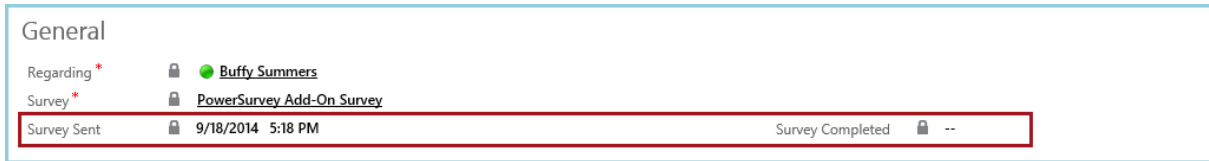
We hope you are enjoying PowerSurvey! We would appreciate your feedback in regards to your experience with this product and your success and troubles along the way. If you need any assistance or have any questions, shoot us an email at powerpackpro@powerobjects.com. Thank you for your help and have a wonderful day!

Jill CRM

Please click here to take an Awesome Survey! ←

POWER OBJECTS

When the Survey Activity is opened again, there will be added data to reflect the details regarding the recipient:



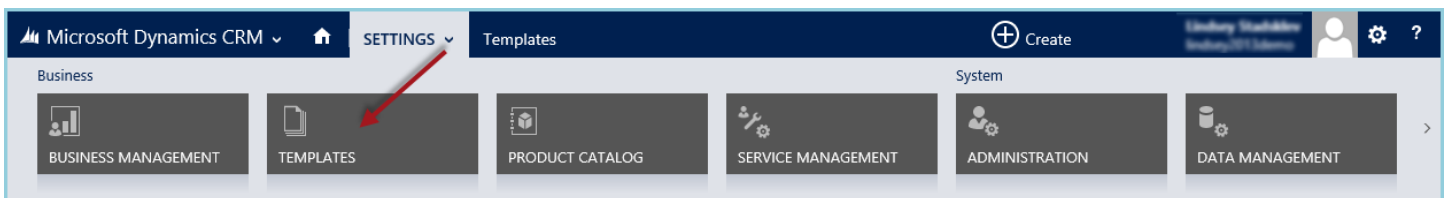
Group – via E-mail Template

In order to send the survey to a number of people at once, an e-mail template need to be created. When using an e-mail template, a specific token must be used so the system will pull the correct survey. The syntax and spelling of the token are very important.

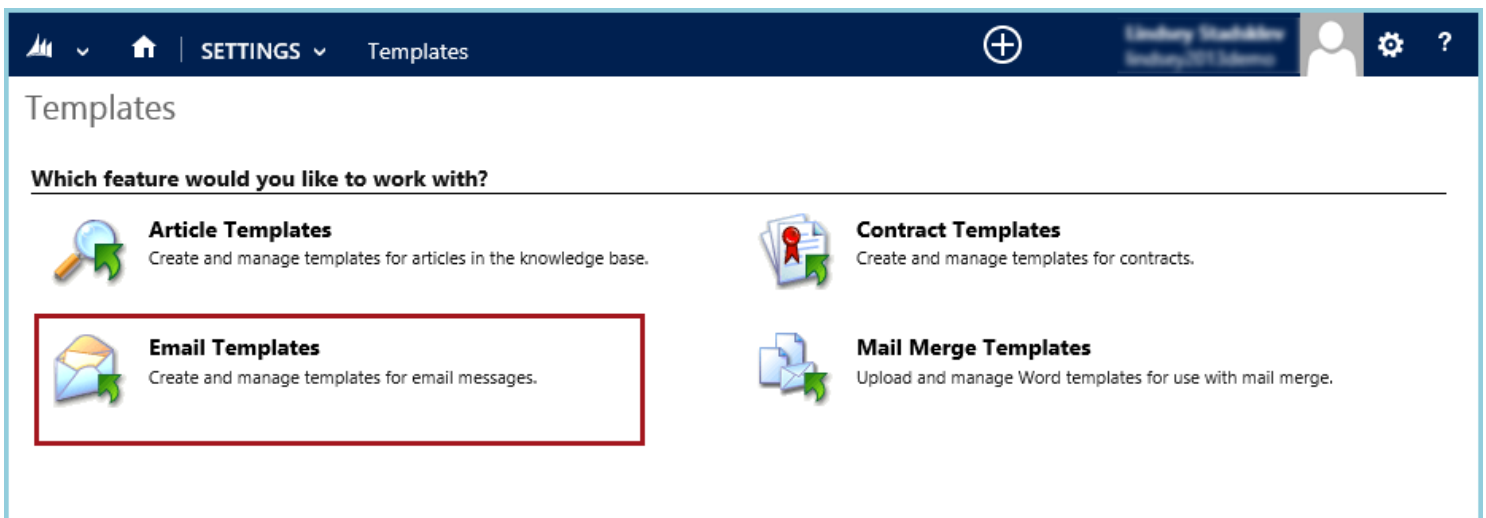
Navigate to Settings.



Navigate to Templates.

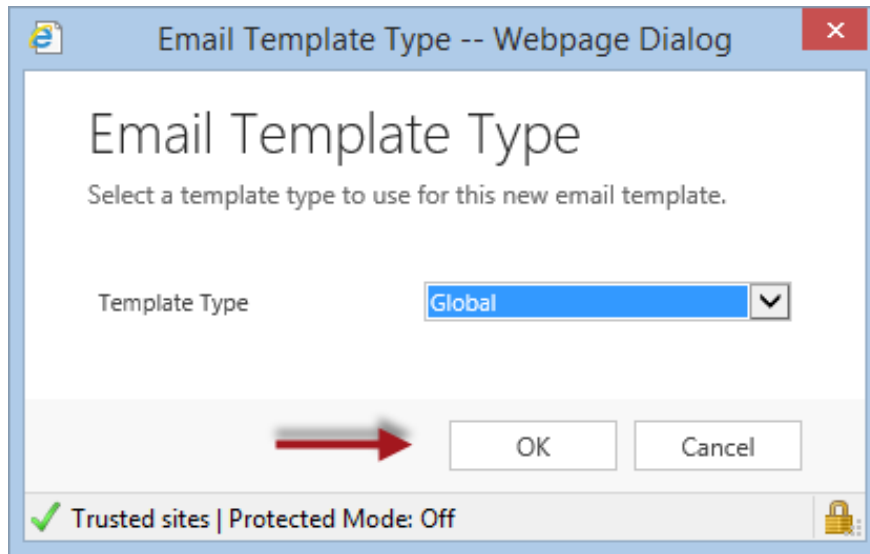


Select E-mail Templates.

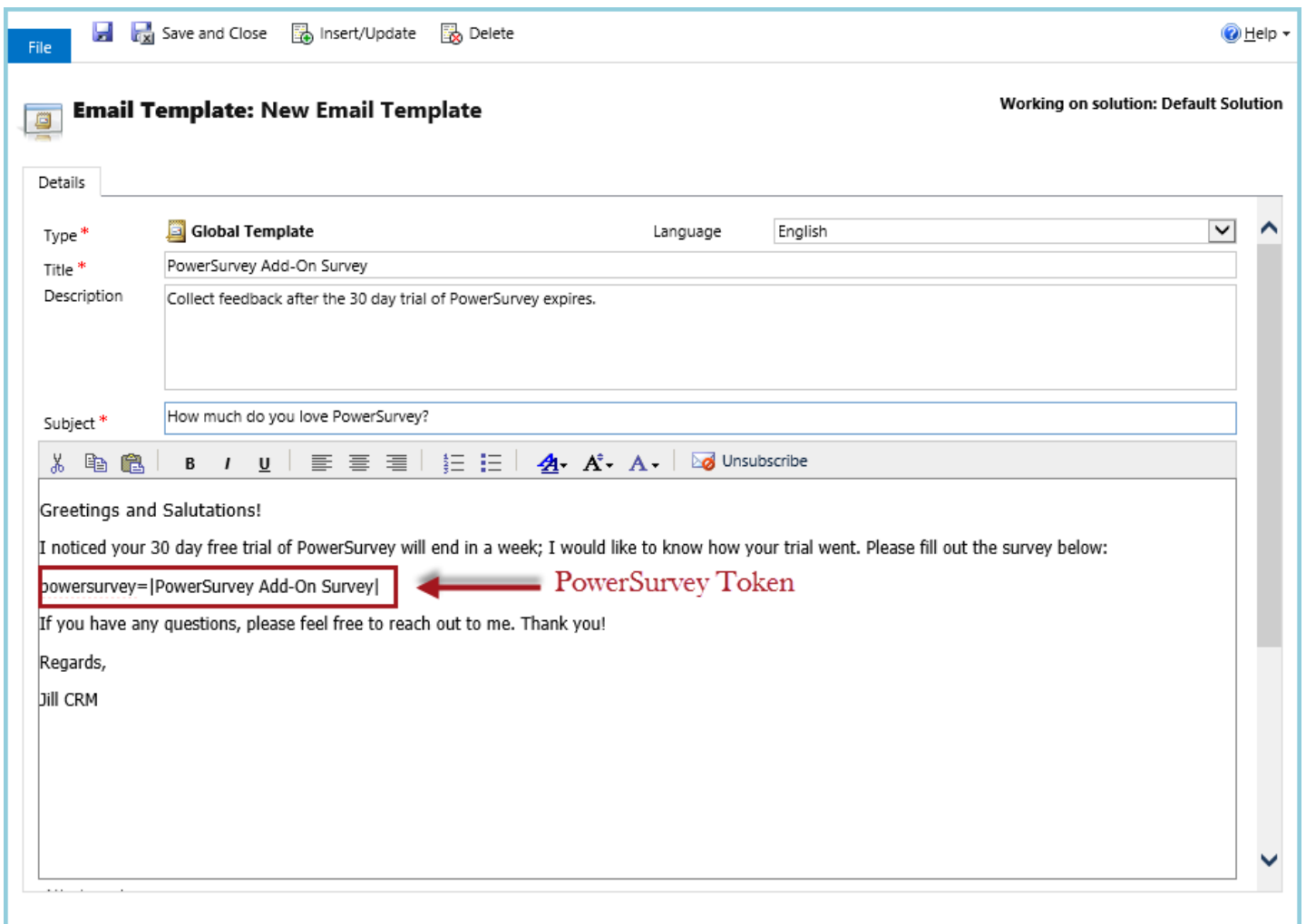


Select New.

Select the E-mail Template Type.



Fill out the Template and Save & Close.



The token can be in any of the following formats

powersurvey=[Exact Name of Survey]

powersurvey=(Exact Name of Survey)

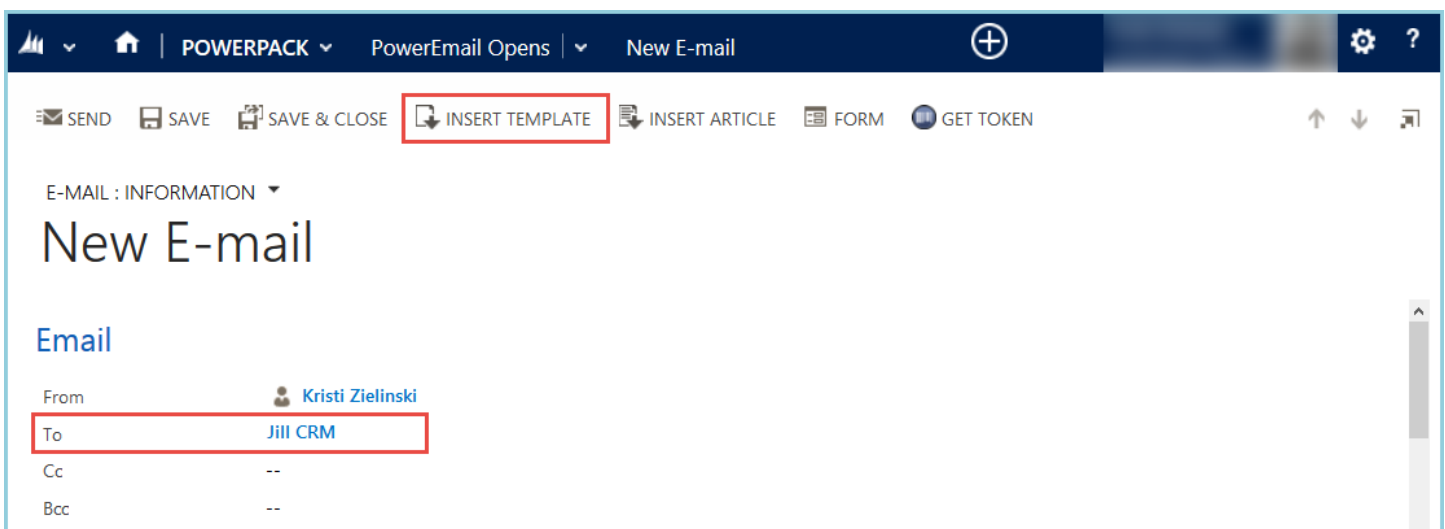
powersurvey="Exact Name of Survey"

powersurvey=|Exact Name of Survey|

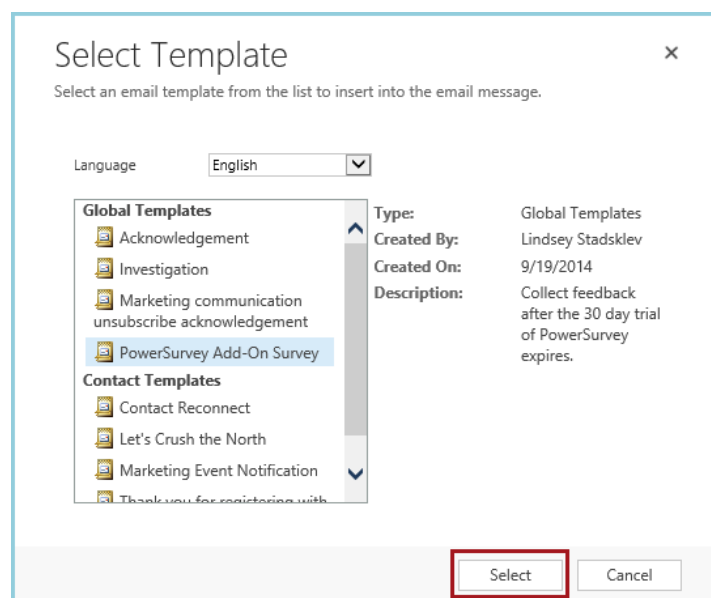
Note: The spelling and case are important when typing in the exact name of survey. These tokens may not be inserted elsewhere in CRM (such as individual e-mail activities) as the activity is not associated with the Survey.

Once this template is saved, you will be able to add it to an e-mail. Simply add your recipient(s); at least one recipient must be added before you may insert the template.

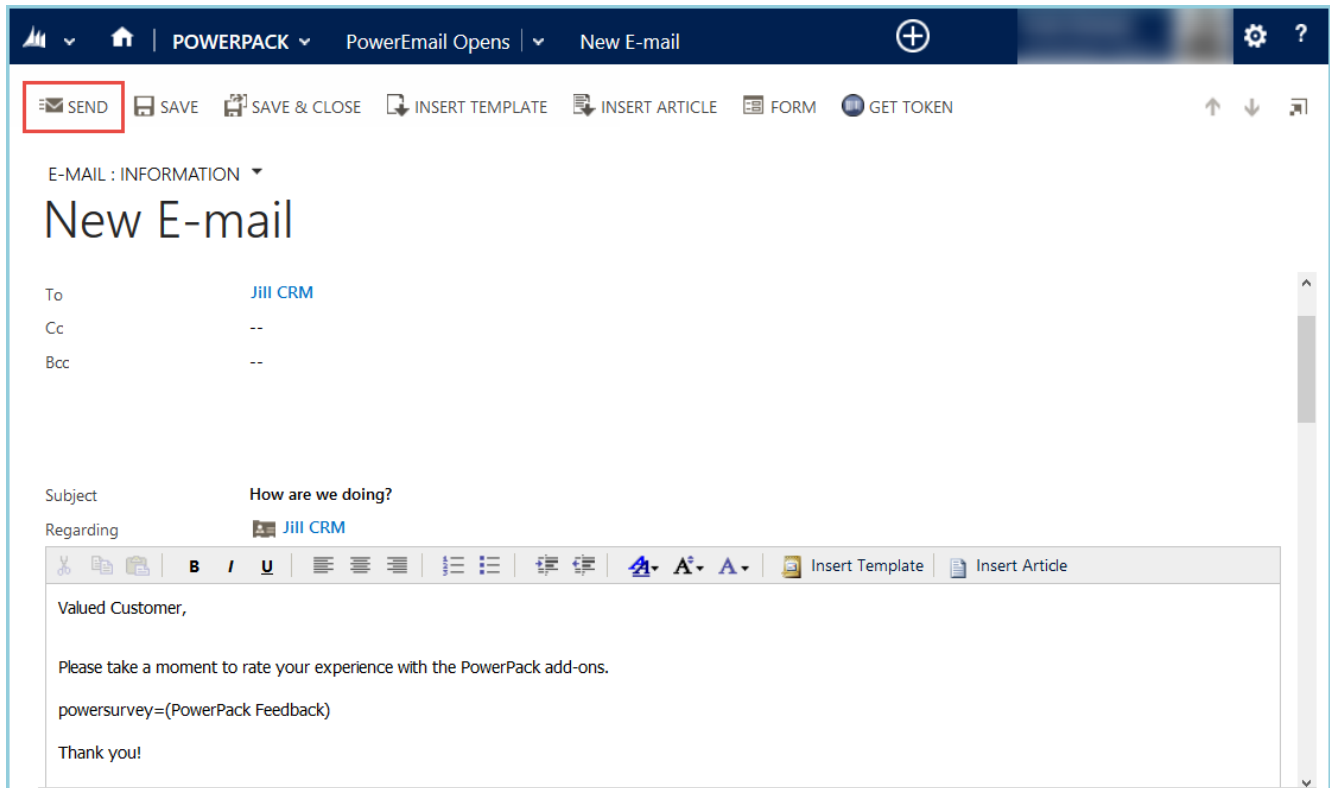
Now, select Insert Template.



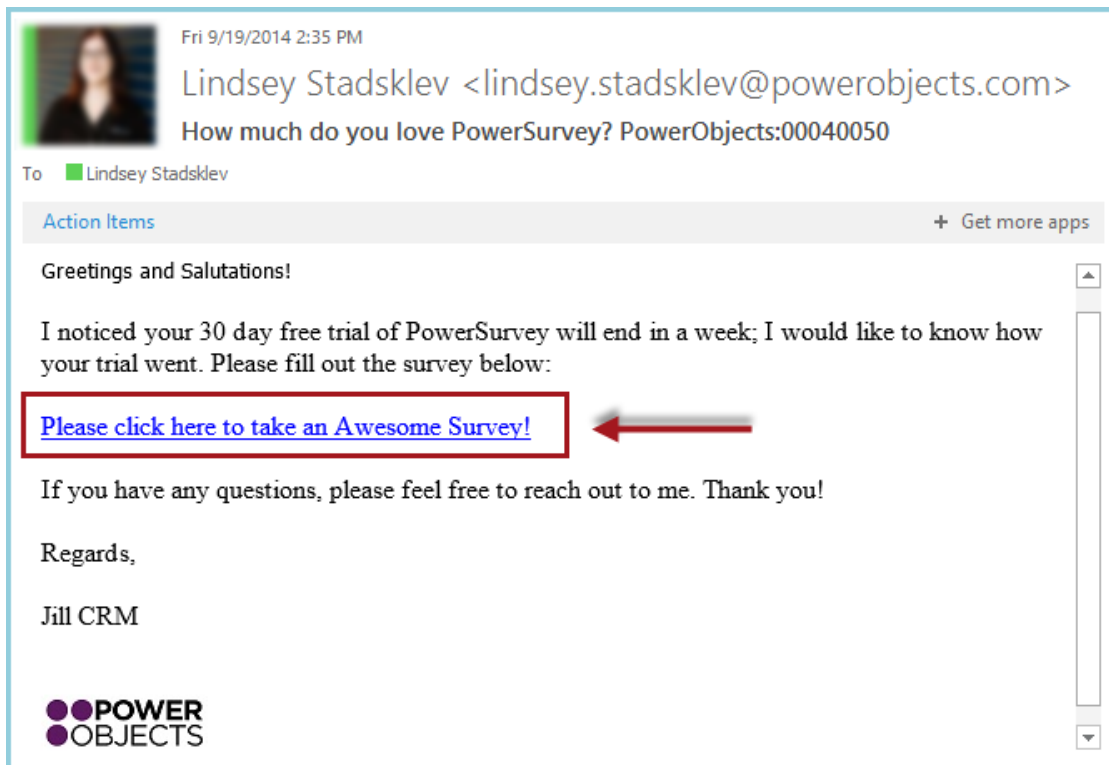
Pick the correct template and click Select.



Notice the Subject and body of the e-mail have been filled in. Now, the e-mail may be sent.



The PowerSurvey token will be replaced with a link to the survey. The e-mail will look like this:



This template may now be used over and over again. This will save time when sending out surveys.

Group/Individual - Sending to a Marketing List via E-mail Template

To send the survey to a marketing list, use the survey template created above. An Advanced Find will need to be created that pulls in all of the marketing list members. If the marketing list is created based on leads, look for leads. If your marketing list is created based on contacts, look for contacts.

There are two scenarios below to use a marketing list to send surveys via Advanced Find: either select the members to be added to a new marketing list and create the view, or go off of a previously created Marketing List.

1. Previously created Marketing List via Quick Campaign:

Open Advanced Find. Set the Look For field to Marketing Lists and the Use Saved View to Active Marketing Lists. To search for the specific Marketing List, click on the Select below Status. Set that row as follows: 'Marketing List' 'Equals' 'insert specific marketing list name'.

The screenshot shows the Microsoft Dynamics CRM Advanced Find interface. The ribbon is set to 'ADVANCED FIND'. The 'Look for:' dropdown is set to 'Marketing Lists' and 'Use Saved View:' is set to 'Active Marketing Lists'. The 'Status' field is set to 'Active' and the 'Marketing List' field is set to 'My PowerUp Con...'. The 'Results' tab is highlighted in the ribbon.

Select the desired Marketing list. Then select Create Quick Campaign.

The screenshot shows the Microsoft Dynamics CRM LIST TOOLS interface. The ribbon is set to 'LIST TOOLS' and 'MARKETING LISTS'. The 'Create Quick Campaign' button is highlighted in the ribbon. Below the ribbon, a table shows a list of marketing lists with columns for Name, Type, Marketing List M..., Last Used On, and Purpose. The row 'My PowerUp Contacts' is selected.

Name ↑	Type	Marketing List M...	Last Used On	Purpose
My PowerUp Contacts	Static	Contact	9/22/2014	

Name the Campaign and click Next:

The screenshot shows a dialog box titled "Create a Quick Campaign" with a close button (X) in the top right corner. Below the title is the instruction "Specify the Campaign Name". A text input field contains the text "My PowerUp Contacts to Email". Below the input field is a "Name:" label. At the bottom of the dialog, there are three buttons: "<Back", "Next>", and "Cancel". The "Next>" button is highlighted with a red rectangle.

Select the Activity Type: E-mail. Assign to the appropriate user. Click Next.


The screenshot shows the same dialog box, now at the "Select the Activity Type and Owners" step. The "Activity Type:" section contains a list of options: Phone Call, Appointment, Scroll, Fax, and E-mail. The "E-mail" option is selected and highlighted with a blue background, and a red rectangle is drawn around it. Below this, the section "Select who will own these new activities." has the instruction "Assign these activities to:". There are three radio button options: "Me" (selected and highlighted with a red rectangle), "The owners of the records that are included in the quick campaign", and "Assign to another user or team" (with a search icon). There are also two checkboxes: "Add the created activities to a queue" (unchecked) and "Mark email messages to be sent and close corresponding email activities." (checked). At the bottom, there are three buttons: "<Back", "Next>", and "Cancel". The "Next>" button is highlighted with a red rectangle.

Check the Use Template box. Click the *template icon* to the right of the Use Template field.

Create a Quick Campaign

Specify the Content of the Activity

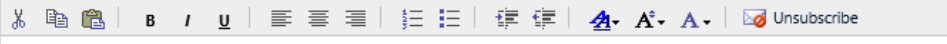
Specify the details of the quick campaign by filling out the available fields in the activity. When you are done, click Next.

Use Template 

▶ Header

From: Lindsey Stadslev

Subject:

Rich text editor toolbar: 

<Back Next> Cancel

Select the desired Template. We will use the template created earlier in this guide.

Select Template

Select an email template from the list to insert into the email message.

Language: English

Global Templates

- Acknowledgement
- Investigation
- Marketing communication unsubscribe acknowledgement
- PowerSurvey Add-On Survey**

Contact Templates

- Contact Reconnect

Type: Global Templates
Created By: Lindsey Stadslev
Created On: 9/19/2014
Description: Collect feedback after the 30 day trial of PowerSurvey expires.

Select Cancel

Note that the Template has been added to the e-mail. Select Next. The subject and body are now locked. The From field may still be edited.

Create a Quick Campaign

Specify the Content of the Activity

Specify the details of the quick campaign by filling out the available fields in the activity. When you are done, click Next.

Use Template PowerSurvey Add-On Survey

▶ Header

From: Lindsey Stadslev

Subject:

Rich text editor toolbar: **B** *I* U [List icons] [Link icon] [Unsubscribe icon]

<Back **Next>** Cancel

Click Create. Clicking Create will now push out the e-mail blast to everyone on the Marketing list.

Create a Quick Campaign

Completing the Create Quick Campaign Wizard

You have successfully completed the wizard. Review the information for your campaign. If you want to make changes, click Back.

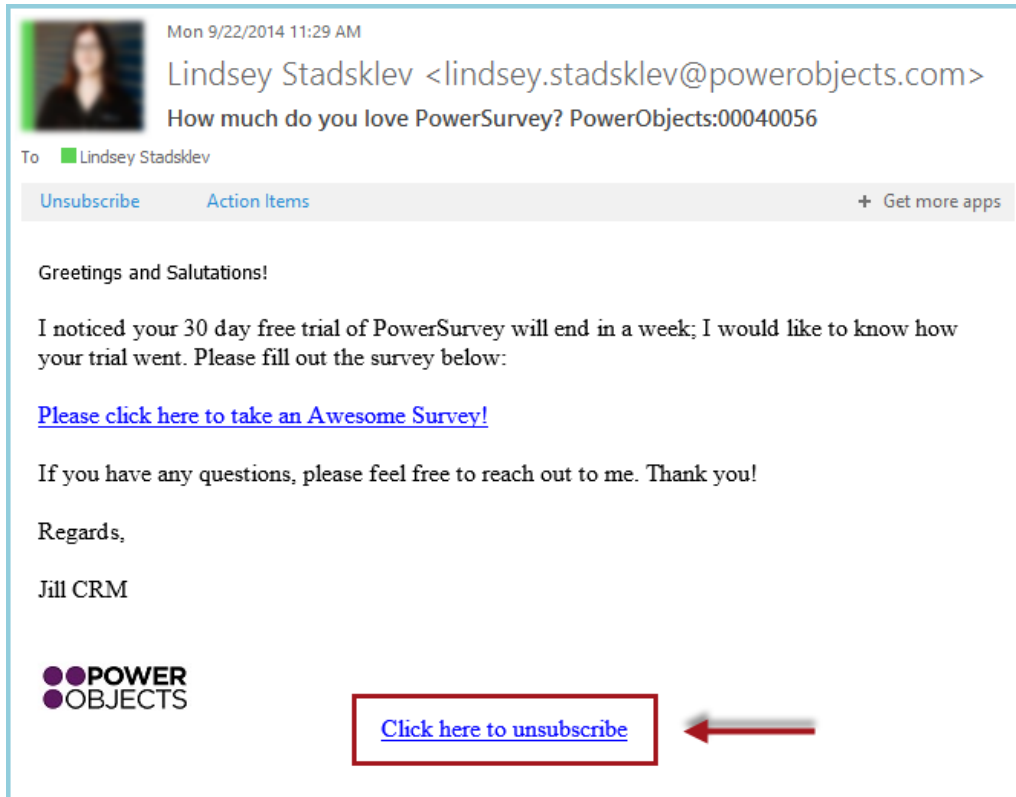
Name: My PowerUp Contacts to Email
Activity: E-mail
Scope: For Selected Records (1)
Owner: Me

After you create this quick campaign, it will be located in the Sales and Marketing pane, under Quick Campaigns.

To create the quick campaign and its activities, click Create.

<Back **Create** Cancel

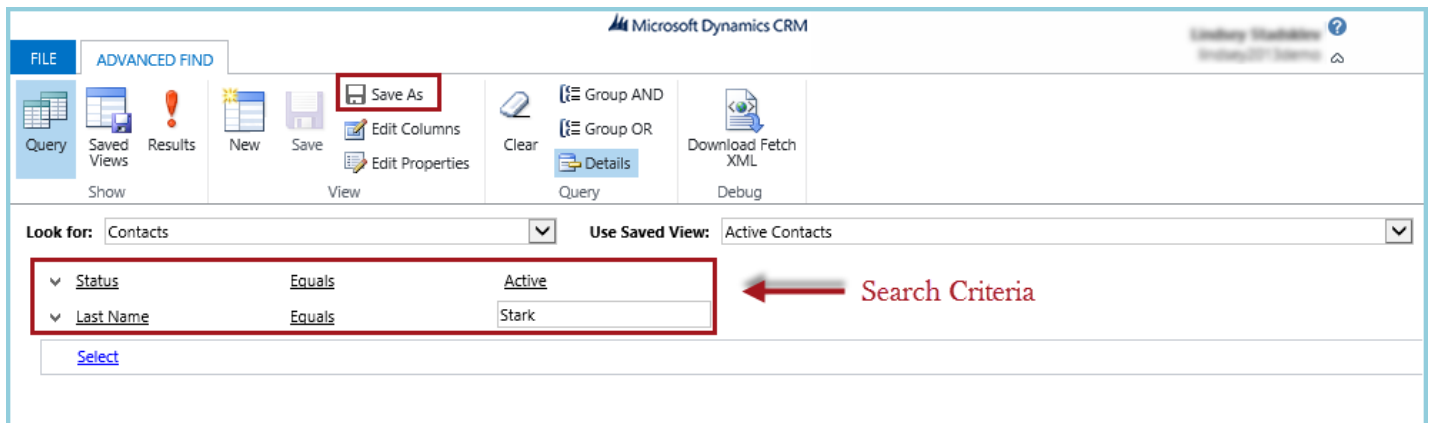
The bulk e-mail will look the same as an individual e-mail except there is an option to unsubscribe at the bottom. This is necessary when sending bulk e-mails to Marketing Lists.



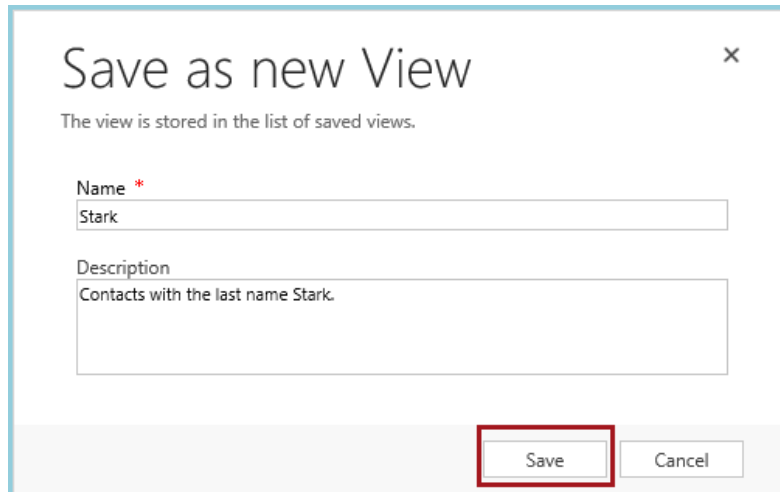
Note: If sending the survey to the marketing list by creating a quick campaign, the survey activities will be set regarding the quick campaign instead of the individual it was sent to, so the answers won't belong to a specific person but instead, the Quick Campaign.

2. Group – Via Advanced Find

Navigate to the Advanced Find. Here, the view of members to be added to the Marketing List will be created. Enter in the necessary criteria to make the custom view. In the below example, a view of all active contacts that have the last name Stark will be created. The criteria can be checked by clicking Results. When the list members are correct, select Save As.



Name the list. By saving this view, it will be easily accessible and may be referenced for future use.



Save as new View

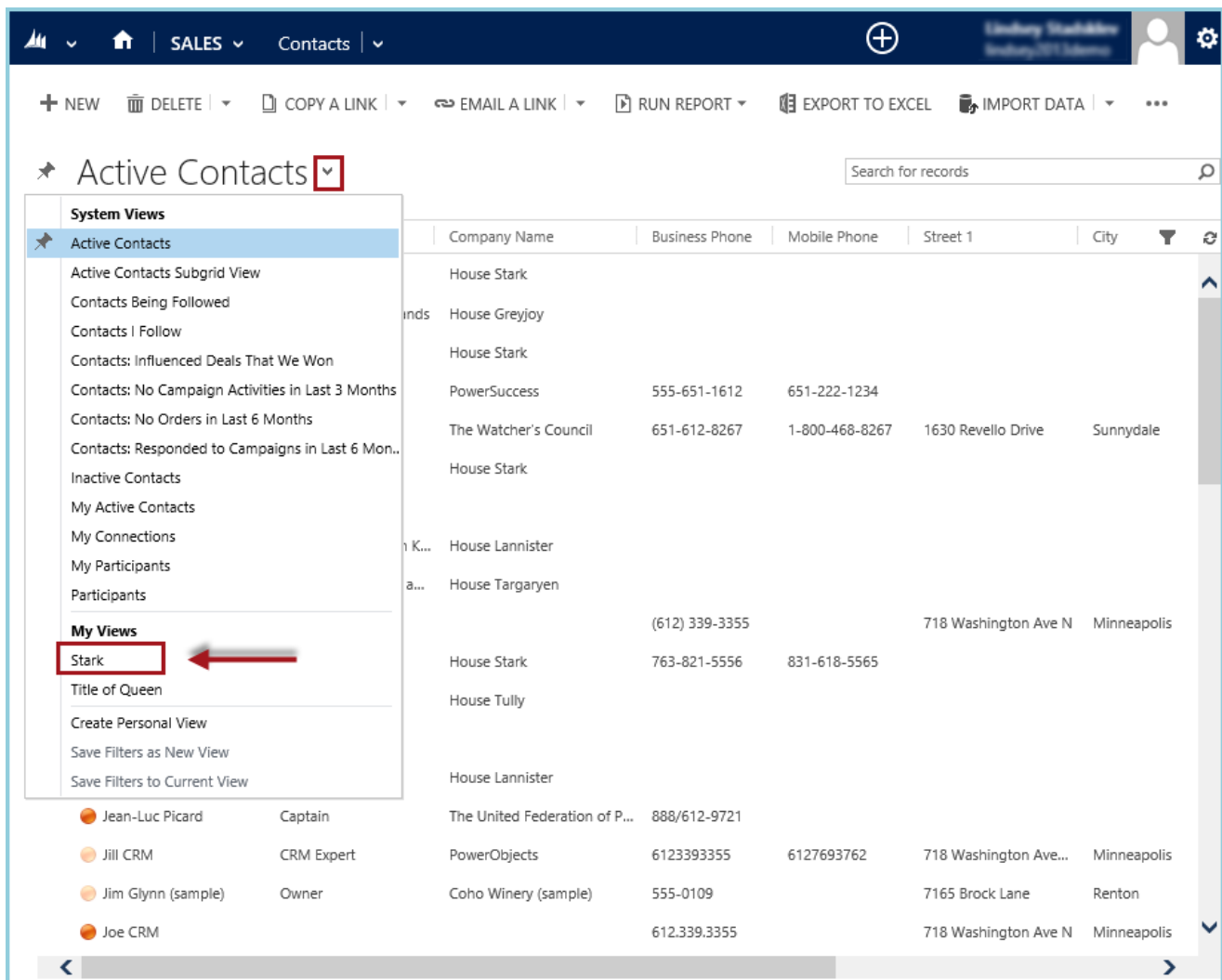
The view is stored in the list of saved views.

Name *
Stark

Description
Contacts with the last name Stark.

Save Cancel

Navigate out of Advanced Find and to the target entity used in the Look For lookup field. In this example, the target will be Contacts. Once on the entity, click on the chevron next to the select view (in this case, Active Contacts). Under My Views, select the view that was just created.



SALES Contacts

NEW DELETE COPY A LINK EMAIL A LINK RUN REPORT EXPORT TO EXCEL IMPORT DATA

Active Contacts

Search for records

System Views

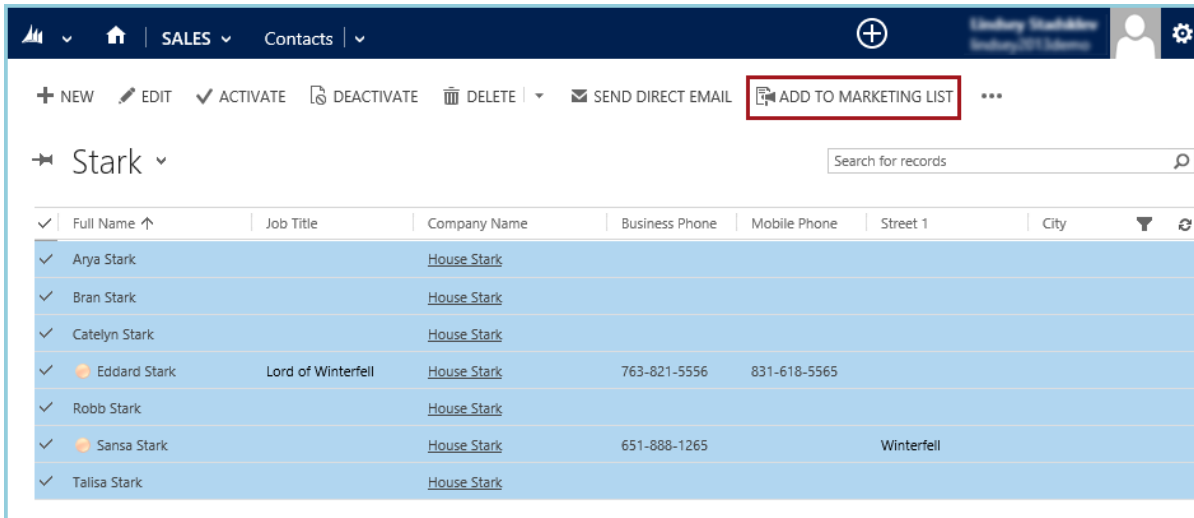
- Active Contacts
- Active Contacts Subgrid View
- Contacts Being Followed
- Contacts I Follow
- Contacts: Influenced Deals That We Won
- Contacts: No Campaign Activities in Last 3 Months
- Contacts: No Orders in Last 6 Months
- Contacts: Responded to Campaigns in Last 6 Mon..
- Inactive Contacts
- My Active Contacts
- My Connections
- My Participants
- Participants

My Views

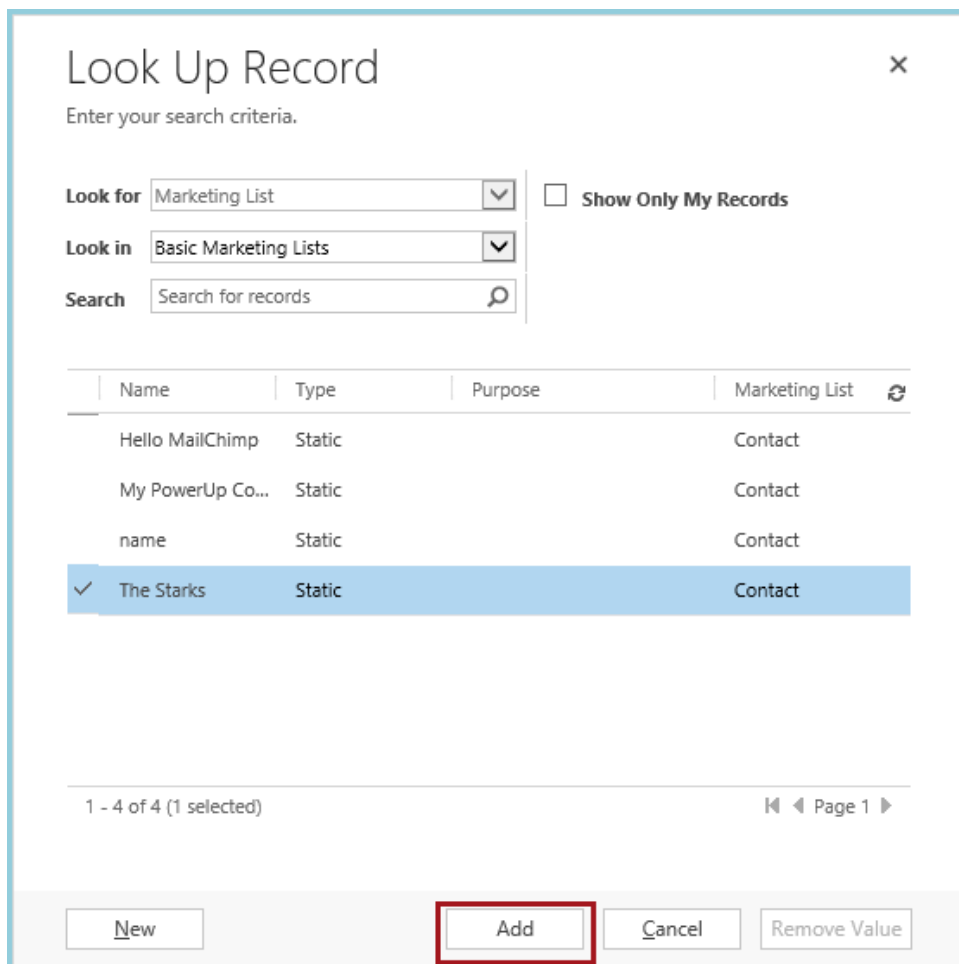
- Stark
- Title of Queen
- Create Personal View
- Save Filters as New View
- Save Filters to Current View

Company Name	Business Phone	Mobile Phone	Street 1	City
House Stark				
House Greyjoy				
House Stark				
PowerSuccess	555-651-1612	651-222-1234		
The Watcher's Council	651-612-8267	1-800-468-8267	1630 Revello Drive	Sunnydale
House Stark				
House Lannister				
House Targaryen				
	(612) 339-3355		718 Washington Ave N	Minneapolis
House Stark	763-821-5556	831-618-5565		
House Tully				
House Lannister				
The United Federation of P...	888/612-9721			
PowerObjects	6123393355	6127693762	718 Washington Ave...	Minneapolis
Coho Winery (sample)	555-0109		7165 Brock Lane	Renton
	612.339.3355		718 Washington Ave N	Minneapolis

To add these members to a marketing list or to create a new marketing list, select the desired members, and click Add to Marketing List.



This will now walk through the steps to create a new list or add to a current marketing list. Choose or create the list to add the selected members to and then click **Add**. To use this marketing list (now or in the future) navigate to marketing lists (reference above for how to send an e-mail through the marketing list via quick campaign). In this example, the e-mail will be sent via the target entity screen.



Select all members that need to be included on the e-mail. Click Send Direct E-mail.

The screenshot shows the PowerSurvey interface for a contact list. The top navigation bar includes 'SALES' and 'Contacts'. Below the navigation bar, there are action buttons: '+ NEW', 'EDIT', 'ACTIVATE', 'DEACTIVATE', 'DELETE', 'SEND DIRECT EMAIL' (highlighted with a red box), and 'ADD TO MARKETING LIST'. The contact list is titled 'Stark' and has a search bar. The list contains the following records:

Full Name	Job Title	Company Name	Business Phone	Mobile Phone	Street 1	City
Arya Stark		House Stark				
Bran Stark		House Stark				
Catelyn Stark		House Stark				
Eddard Stark	Lord of Winterfell	House Stark	763-821-5556	831-618-5565		
Robb Stark		House Stark				
Sansa Stark		House Stark	651-888-1265		Winterfell	
Talisa Stark		House Stark				

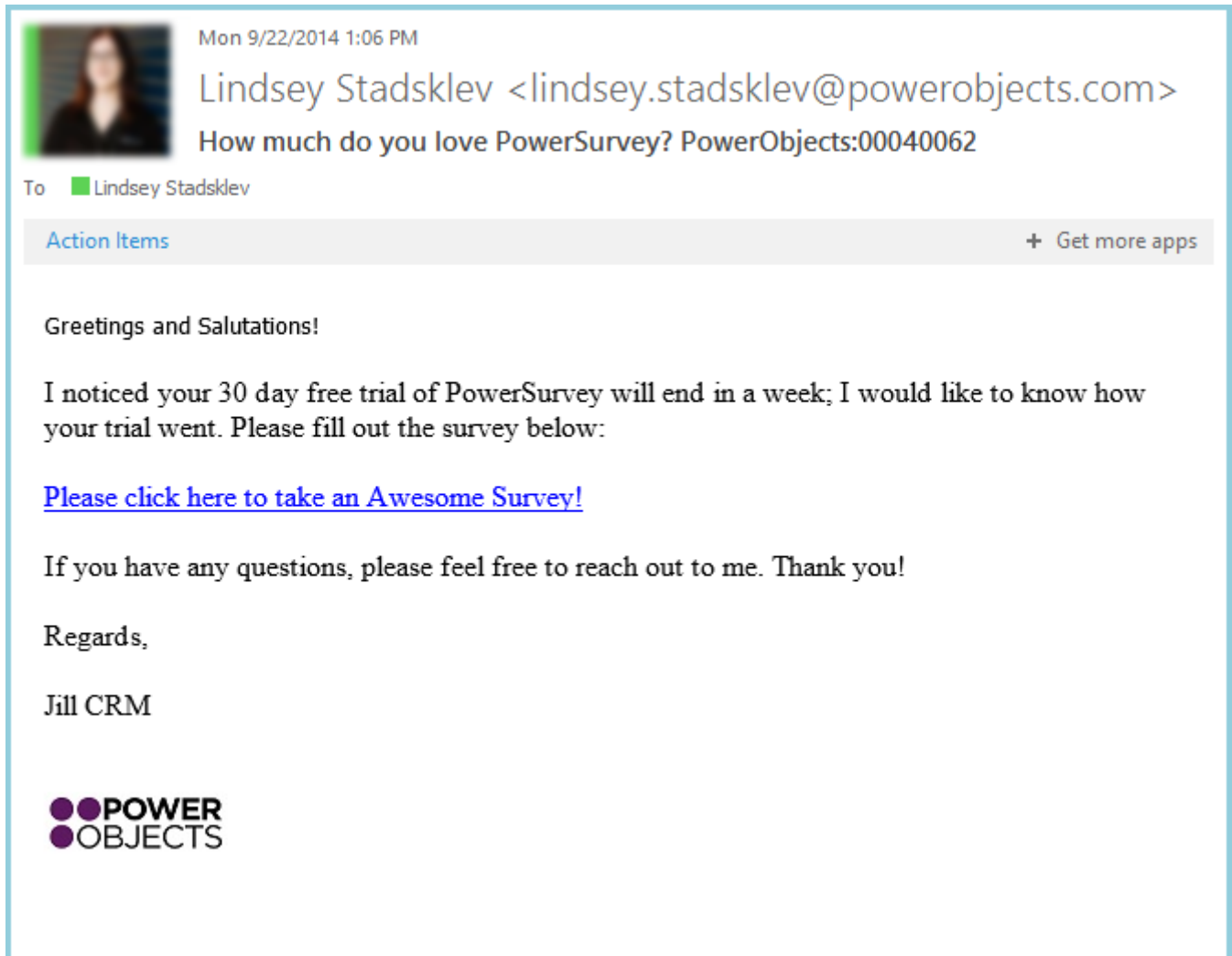
Select the E-mail Template to use for this particular e-mail. The Template created earlier in the guide will be used. Click Send.

The 'Send Direct Email' dialog box is shown. It prompts the user to 'Select an email template to use and which records to send to from the following options.' The 'Language' is set to 'English'. Under 'Global Templates', the 'PowerSurvey Add-On Survey' template is selected and highlighted with a red box. To the right, the template details are displayed:

- Type: Global Templates
- Created By: Lindsey Stadskev
- Created On: 9/19/2014
- Description: Collect feedback after the 30 day trial of PowerSurvey expires.

Under 'Send direct email to:', the 'Selected records on current page' option is selected. Under 'Send direct email from:', the 'User or Queue' is set to 'Lindsey Stadskev'. At the bottom, the 'Send' button is highlighted with a red box.

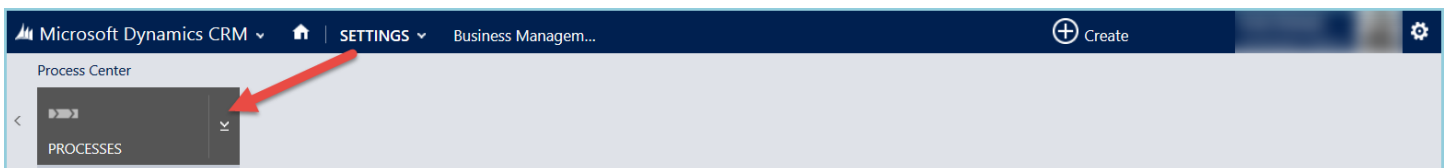
The E-mail will appear similar to below:



Group – Via Workflow
Navigate to Settings.



Select Processes.



This will display your 'My Processes' list. Simply select New.

Choose the name of the workflow. Select the correct Target entity for the workflow. Next, under Category, select Workflow. Hit OK.

Create Process
Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: * PowerSurvey Email

Category: * Workflow Entity: * Contact

Run this workflow in the background (recommended)

Type: New blank process
 New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owner
No process template records are available in this view.		

0 - 0 of 0 (0 selected) Page 1

Properties

OK Cancel

Set the workflow up to run the way it is intend to in order to fire an e-mail under the correct conditions. This example only shows the e-mail step and is *not* a complete workflow. The e-mail be sent from a previously created E-mail template or from a brand new e-mail message.

1. Via E-mail Template

Choose Use Template and select Properties.

Process: PowerSurvey Email Working on solution: Default Solution

Information

General Administration Notes

▼ Hide Process Properties

Process Name * PowerSurvey Email Entity Contact

Activate As Process Category Workflow

Available to Run

Run this workflow in the background (recommended)
 As an on-demand process
 As a child process

Workflow Job Retention

Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope User

Start when: Record is created
 Record status changes
 Record is assigned
 Record fields change Select
 Record is deleted

Add Step ▼ Insert ▼ Delete this step.

✖ Email the Survey

Send email: Use Template Contact Set Properties

Choose the Template and select Save & Close.

Process: PowerSurvey Email
Send Email Using Template

E-mail

From:

To:

Cc:

Bcc:

Link to Survey:

Track this email:

Template Type: Global Template

Regarding:

Email Templates All Language Email Templates

Search for records

Run Workflow... | Start Dialog

Title	Template Type	Viewable By	Language
Acknowledgement	Global	Organization	English(1033)
Investigation	Global	Organization	English(1033)
Marketing communication unsubscribe acknowledgement	Global	Organization	English(1033)
<input checked="" type="checkbox"/> PowerSurvey Add-On Survey	Global	Organization	English(1033)

Form Assistant

Dynamic Values

Operator:

Look for: Contact

Add

Default value: OK

2. Via New E-mail (Create New Message)

Select Create New Message and then click Properties.

Process: PowerSurvey Email
Information

Working on solution: Default Solution

General Administration Notes

Hide Process Properties

Process Name*: PowerSurvey Email

Activate As: Process

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Workflow Job Retention

Automatically delete completed workflow jobs (to save disk space)

Entity: Contact

Category: Workflow

Options for Automatic Processes

Scope: User

Start when: Record is created

Record status changes

Record is assigned

Record fields change

Record is deleted

Add Step | Insert | Delete this step.

Email the Survey

Send email: Create New Message

Set up the e-mail as preferred. Make sure the Link to Survey is populated with the correct survey. Then, anywhere in the body of the e-mail, insert the PowerSurvey token, [powersurvey]. If the token is not inserted into the e-mail, it will appear at the bottom. Click Save & Close.

The screenshot shows the 'Send Email' configuration window for a 'PowerSurvey Email' process. The 'Link to Survey' dropdown is highlighted with a red box and contains 'PowerSurvey Add-On Survey'. The email body text is: 'Good Day! We hope you have enjoyed your free 30 day trial of PowerSurvey. Please provide us with your feedback: [powersurvey] Please feel free to reach out to us with questions at: powerpackpro@powerobjects.com Thank you! Jill CRM'. The token '[powersurvey]' is highlighted with a red box and a red arrow. The 'Form Assistant' panel on the right shows 'Dynamic Values' configuration with 'Operator: Set to', 'Look for: Contact', and 'Address 1'.

Note: Make sure the "Regarding" field of the e-mail is set to an entity that has a survey mapping created for it. If the regarding is not set, the survey link will not be inserted.

Individual – Via E-mail Activity

Navigate to the record the e-mail/survey will be sent from. Once on the record, make sure the Activities tab is displayed. Click the Ellipse next to Add Task. From the drop down list, select E-mail.

The screenshot shows the Microsoft Dynamics CRM interface for a contact named Buffy Summers. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Contacts', and 'Buffy Summers'. Below the navigation bar, there are action buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', and 'DELETE'. The contact's name 'Buffy Summers' is displayed prominently. Under the 'Summary' section, there is a 'CONTACT INFORMATION' table with fields like Full Name, Contact ID, Job Title, Company Name, Email, Business Phone, Mobile Phone, and Reward Code. To the right, the 'ACTIVITIES' tab is active, showing a list of activities. A dropdown menu is open next to the 'Add Task' button, with 'E-mail' selected and highlighted by a red arrow. Other options in the menu include Appointment, ACH Transaction, Credit Card Transaction, PowerMailChimp Activity, SMS Message, Survey Activity, and Web Form Activity.

Create the e-mail as desired. A previously created template may be used by selecting Insert Template at the top of the page; or, create a completely unique e-mail. If not using a template, make sure the Link to Survey field is tied to a survey or the Token in the e-mail will not be replaced. When satisfied with the e-mail, Send it!

POWERPACK | PowerEmail Opens | New E-mail

SEND SAVE SAVE & CLOSE INSERT TEMPLATE INSERT ARTICLE FORM GET TOKEN

E-MAIL : INFORMATION

New E-mail

E-mail

From **Lindsey Stadsklev**

To **Buffy Summers**

Cc --

Bcc --

Link to Survey **PowerSurvey Add-On Survey**

Track this email

Subject --

Regarding **Buffy Summers**

Hi Buffy,

Your trial for PowerSurvey is now expired. Please fill out the below survey:

`|powersurvey|` ← **PowerSurvey Token**

Email me with any questions or if you wish to subscribe to PowerSurvey.

Thank you!

Jill CRM

Status Reason **Draft**

Activity Status **Draft**

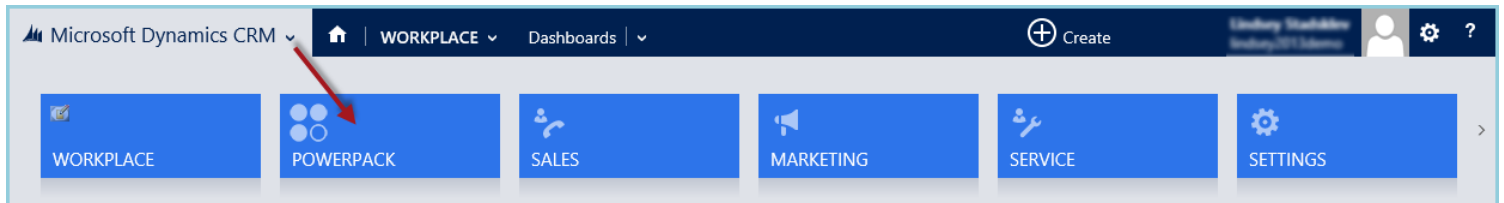
Note: The link to the survey will be inserted at the very end of the e-mail by default. If you would like the link to be somewhere else in the body of the e-mail, you can place the token `|powersurvey|` where you would like the hyperlink to be placed.

Group – Via PowerMailChimp

PowerMailChimp works within CRM as well as with MailChimp. Before sending the survey using PowerMailChimp, it is preferable to make sure the template that will be attached is ready when the e-mail blast is created. The template does not need to be finished in order to attach it. The order of this guide is meant to provide a better flow for this process. The template may be edited any time before the blast is sent; even after the template has been added to the blast. Edits to the template will sync over to the e-mail blast from MailChimp.

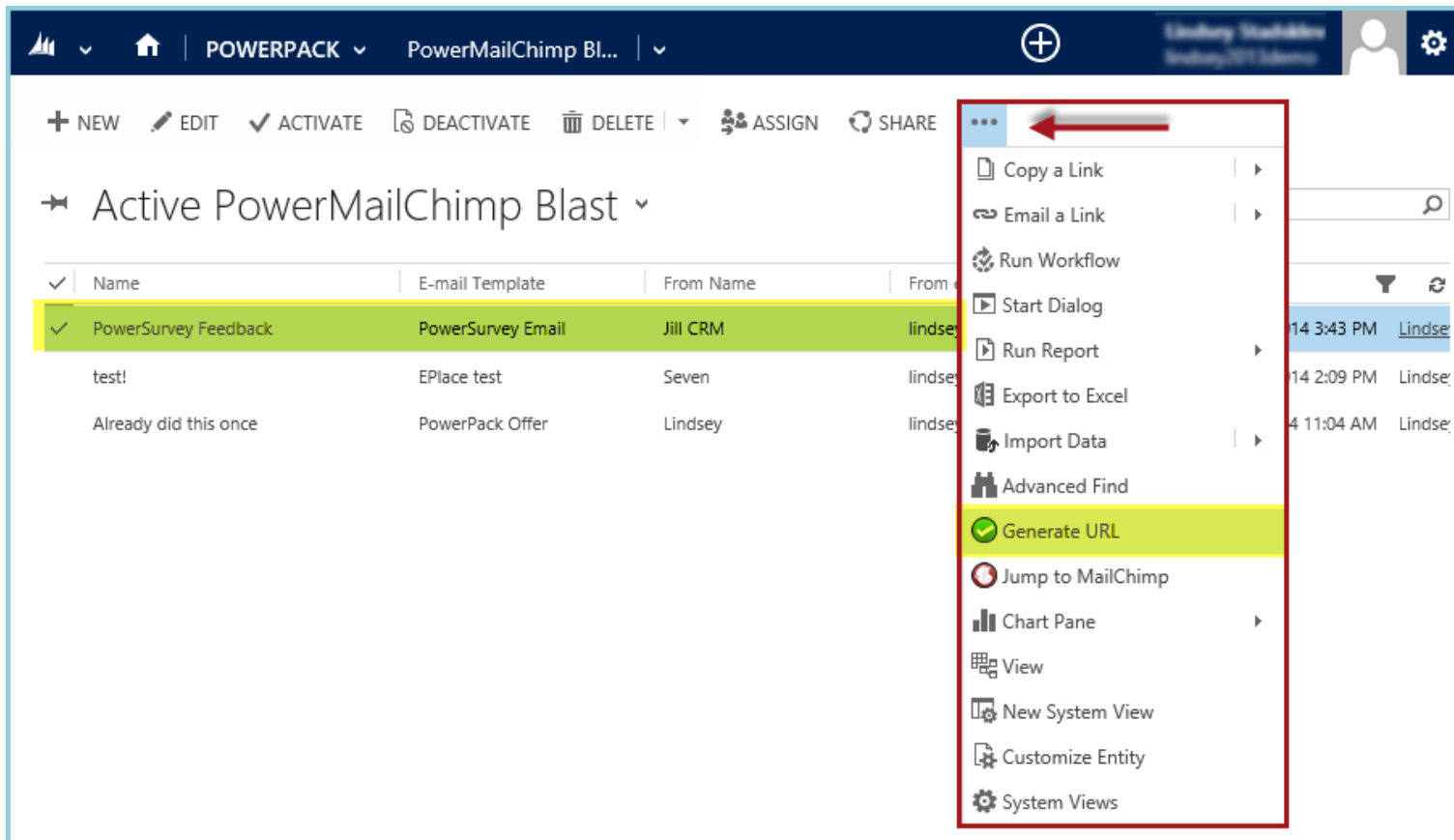
To begin this process, start by acquiring the Survey URL to insert into the MailChimp Template.

Navigate to PowerPack.



Navigate to PowerMailChimp Blasts.

Select the Blast that the Survey Link is needed. Click the Ellipse. From the drop down menu, select Generate URL.



Select the desired Survey. Click Copy to Clipboard.

Survey URL

Select Survey name to generate Survey URL

Survey **PowerSurvey Add-On Survey** ▼

URL **https://cloud.crm.powerobjects.net/powerSurveyV3/Generate.aspx** 🔒

Copy to Clipboard

Now, Jump to the MailChimp site (reference the PowerMailChimp User Guide for help creating Template in MailChimp). Open the template to insert the survey link. Click in the area of the template the link will be inserted. Type the text you want survey recipients to click to be routed to the survey; for example, click here. Highlight the text and click the Link button.

PowerSurvey Email | Rename | Preview and Test

POWER OBJECTS
The CRM Experts

Increase the Functionality of your CRM
PowerSurvey
An Add-On from PowerObjects

I noticed your free trial of PowerSurvey is about to expire. I hope you have enjoyed using PowerSurvey. Please let us know what you think by taking the survey below.

Click here to take our Awesome Survey!

If you have any questions, please feel free to reach out to us at PowerPackPro@powerobjects.com.

Thank you!
Jill CRM

Text | Content | Style | Settings

Link | Styles | Font | Size | Merge Tags

Click here to take our Awesome Survey! ← Highlighted Text to be Linked to Survey

Highlighted Text to be Linked to Survey

Save & Close | autosaved 9:08AM Central Daylight Time 9/24/14

Save and Exit

Paste the URL generated in CRM into the Web Address (URL) field. Then click Insert.

Insert or Edit Link

Link to:
Web Address

Web Address (URL)

393e-e411-941a-00155dcfc126&oid=*&otype=*&otj

> Advanced Options | Remove Link

Insert Cancel

The Text typed earlier should now be linked to the designated survey. When satisfied, hit Save and Exit.

PowerSurvey Email | Rename

Preview and Test

POWER OBJECTS
The CRM Experts

Increase the Functionality of your CRM
PowerSurvey
An Add-On from PowerObjects

I noticed your free trial of PowerSurvey is about to expire. I hope you have enjoyed using PowerSurvey. Please let us know what you think by taking the survey below.

[Click here to take our Awesome Survey!](#)

If you have any questions, please feel free to reach out to us at PowerPackPro@powerobjects.com.

Thank you!
Jill CRM

Text

Content Style Settings

B I U Clear Styles

Styles - Font - Size - Merge Tags -

I noticed your free trial of PowerSurvey is about to expire. I hope you have enjoyed using PowerSurvey. Please let us know what you think by taking the survey below.

[Click here to take our Awesome Survey!](#) **Linked text**

If you have any questions, please feel free to reach out to us at PowerPackPro@powerobjects.com.

Thank you!
Jill CRM

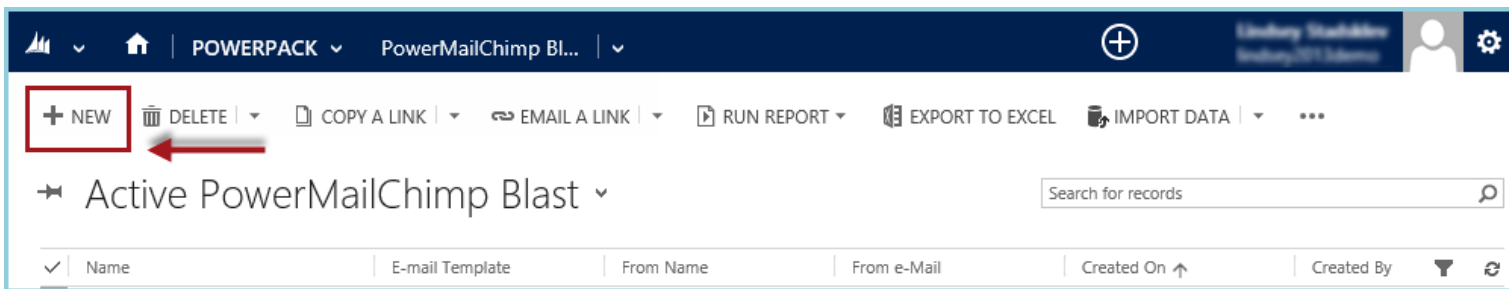
Save & Close autosaved 9:08AM Central Daylight Time 9/24/14

Save and Exit >

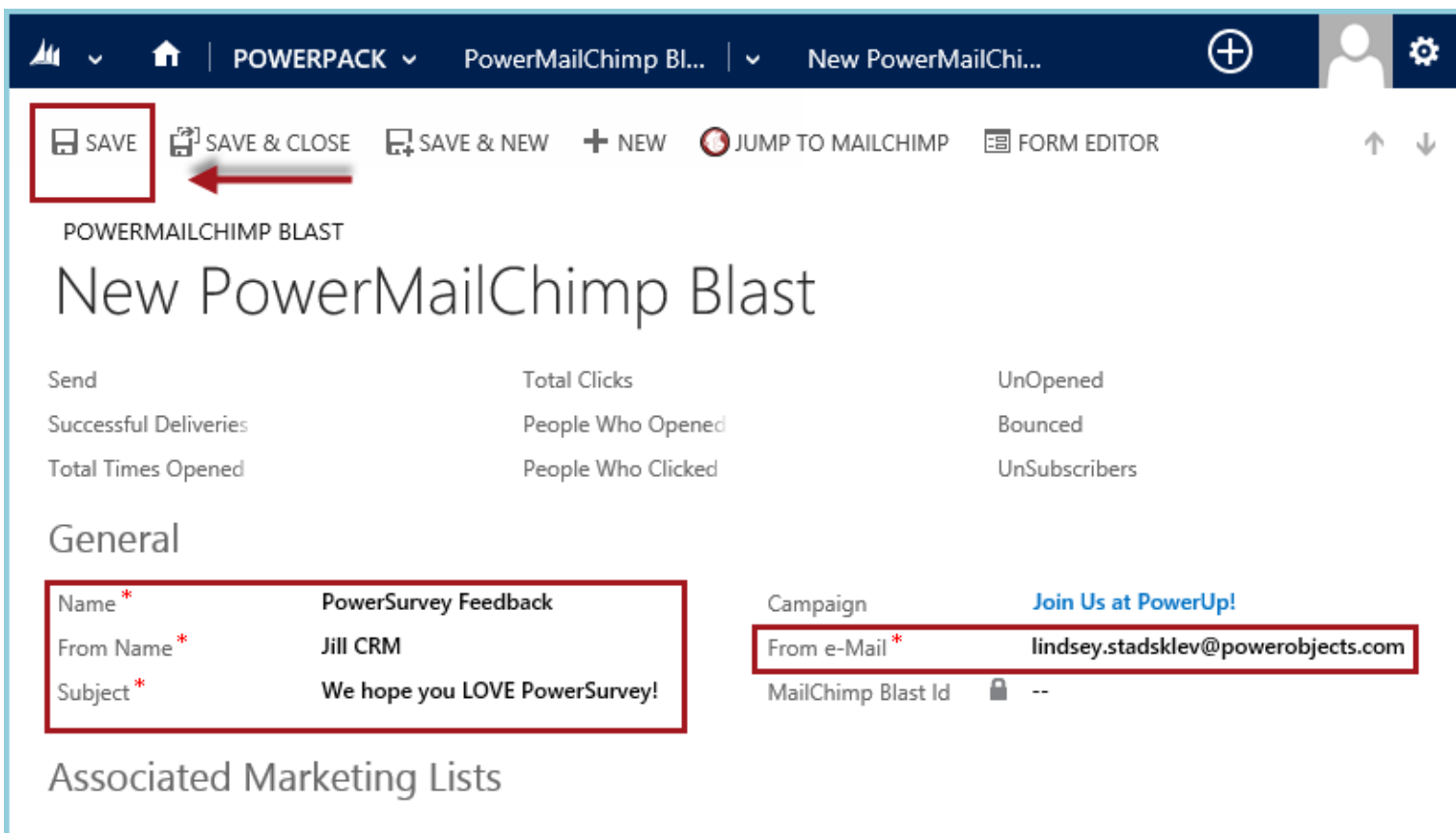
Now, Jump back into CRM to create the Survey E-mail Blast.

Navigate back to PowerMailChimp Blasts, under the PowerPack tile.

Select New.



Fill out the necessary details and Save the record.



Once the record has been *saved*, now add the PowerMailChimp Marketing list (refer to PowerMailChimp user guide for help creating and syncing the Marketing List with MailChimp). Click the Plus to add the Marketing List.

General

Name* **PowerSurvey Feedback** Campaign **Join Us at PowerUp!**
 From Name* **Jill CRM** From e-Mail* **lindsey.stadsklev@powerobjects.com**
 Subject* **We hope you LOVE PowerSurvey!** MailChimp Blast Id **--**

Associated Marketing Lists

→ +

Name ↑	Type	Marketing List Mem...	MailChimp List	Purpose
No Marketing List records found.				

← →

Select the list so it appears in the selected record box. Then hit Add.

Look Up Records

Enter your search criteria.

Look for: Show Only My Records
 Look in:
 Search:

✓	Name ↑	Type	Marketing List M...	MailChimp List	↻
✓	Hello MailChimp	Static	Contact	PowerSurvey Contacts	

← →

1 - 1 of 1 (1 selected) Page 1

Selected records:

Hello MailChimp

Select Remove

New → Add Cancel

The will now display in the Associated Marketing Lists view.

Associated Marketing Lists

Name ↑	Type	Marketing List Mem...	MailChimp List	Purpose
Hello MailChimp	Static	Contact	PowerSurvey Contacts	



Now add the PowerMailChimp E-mail Template (please refer to the PowerMailChimp User Guide for help creating a template from MailChimp). Click Select MailChimp Template.

Associated Marketing Lists

Name ↑	Type	Marketing List Mem...	MailChimp List	Purpose
Hello MailChimp	Static	Contact	PowerSurvey Contacts	

Email Tracking
Advanced Tracking

Email Contents

E-mail Template  -- 


Select the template. Then select OK.

Templates List

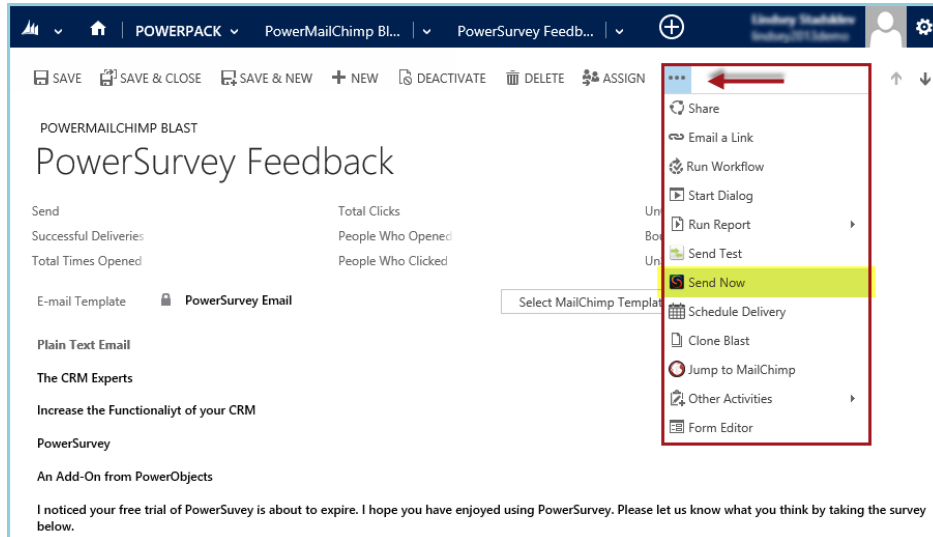
Select a Template and click OK or double click a row.

✓	Name	Created On
✓	PowerSurvey Email	9/23/2014

1 - 1 (1 selected) Page 1



Now the e-mail is ready to go! Click the Ellipse at the top. Then from the drop down menu, click Send Now.



Confirm it is okay to send the Blast.

A message confirming the success of the Blast will be displayed upon successfully sending the Blast to the marketing list.

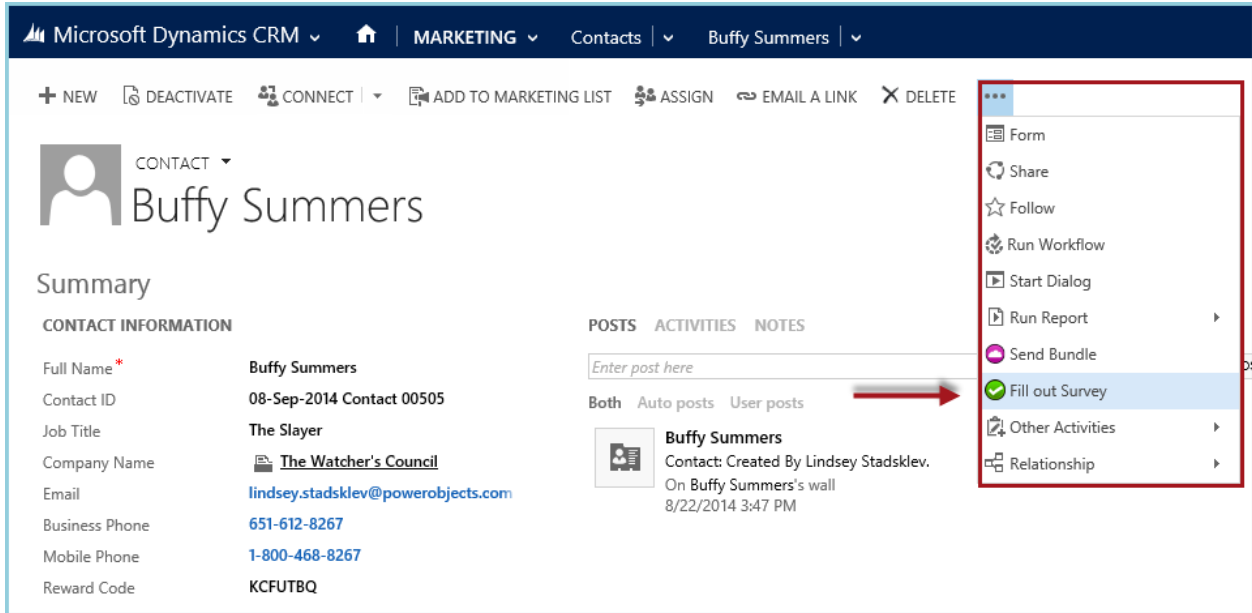
Example E-mail:



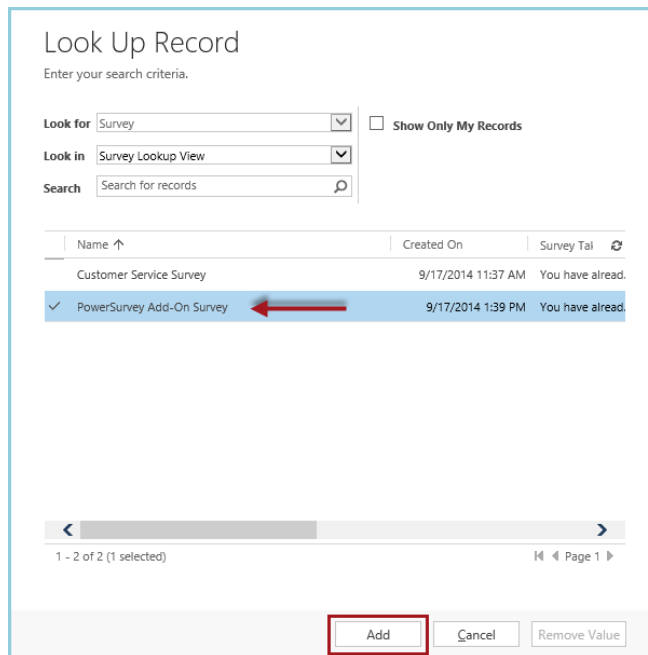
“Fill Out Survey” Button on Contact/Lead Record

Another option for filling out a survey would be to open a contact or lead record and click on Fill out Survey. This way, it is possible to fill out the survey for that contact or lead on the spot, instead of having to e-mail them the survey. This may be useful in a situation where someone is on the phone and needs to fill out a survey. Once a survey is generated by clicking on this button, a survey activity is created and appended to that person’s record, along with their responses (just as it would be if the survey had been sent to them in an e-mail with a survey link).

Navigate to the Contact/Lead record in question. Click the Ellipse at the top. From the drop down menu, select Fill Out Survey.



Choose the necessary Survey.

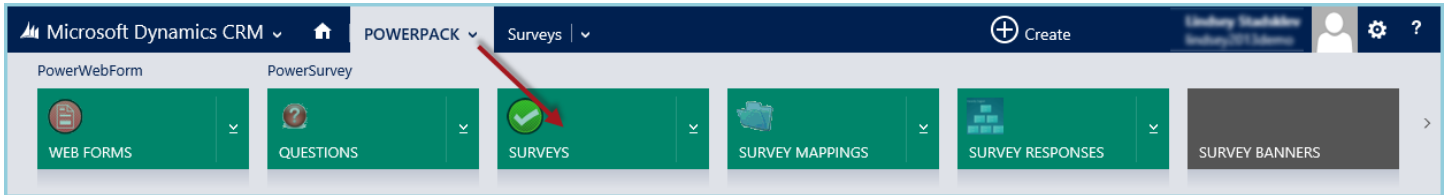


This will pull the survey as it would appear if someone had clicked on the link to take the survey.

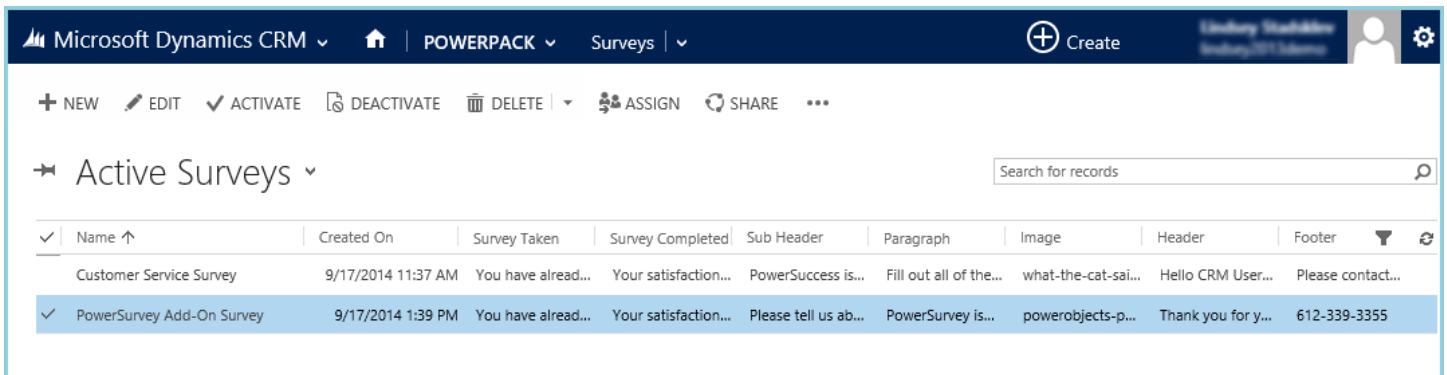
Anonymous PowerSurveys

Some users may find it useful to have the ability to post surveys to a webpage for visitors to fill out anonymously.

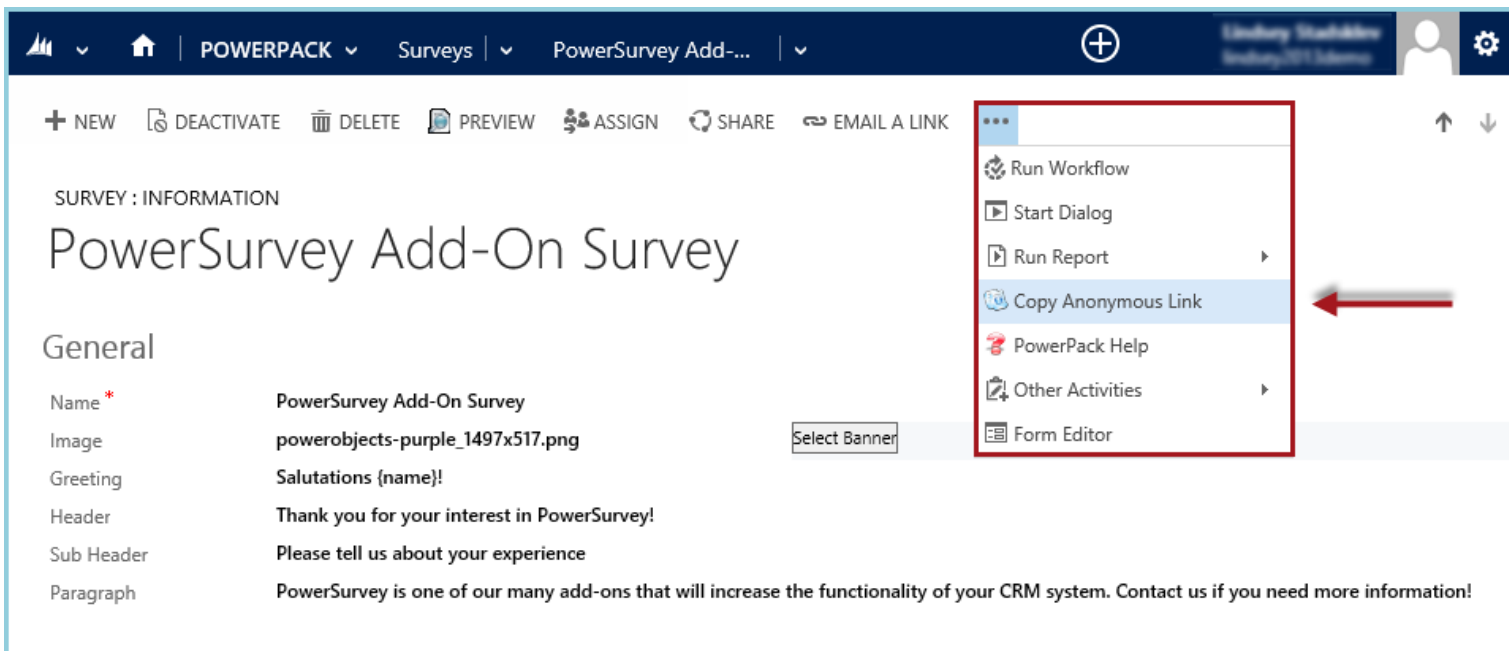
Navigate to Surveys.



Open the desired Survey.



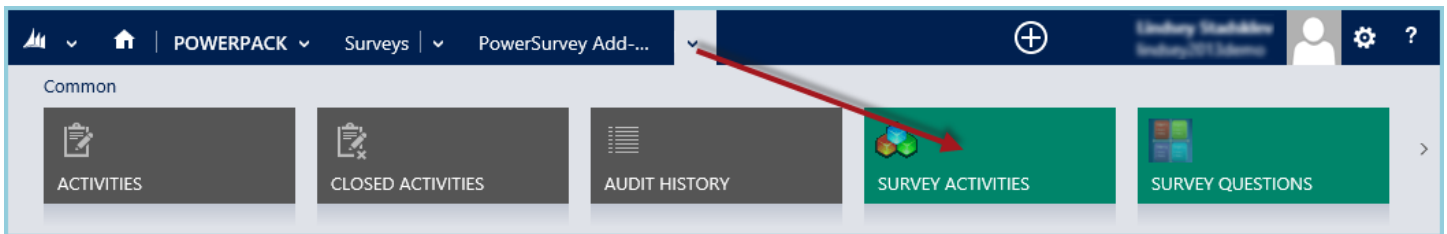
Click on the Ellipse at the top. From the drop down, select Copy Anonymous Link.



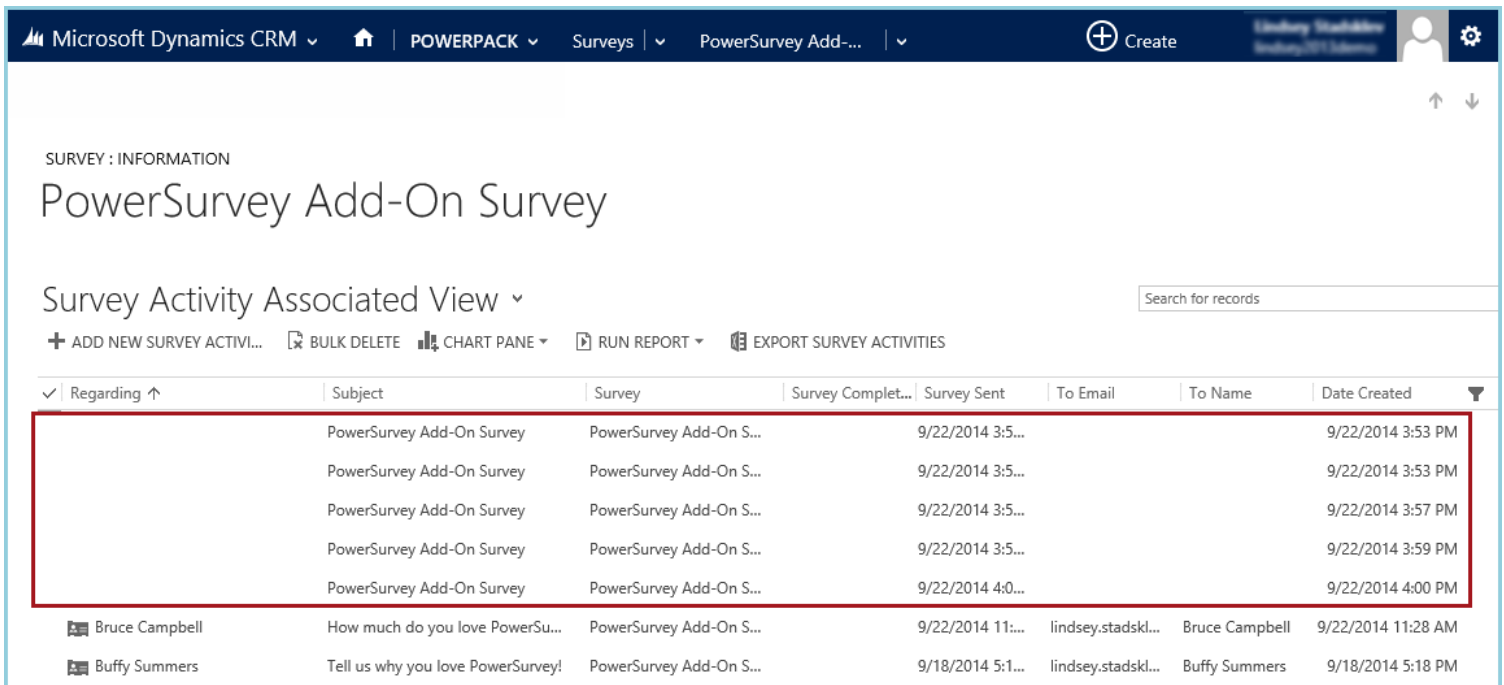
The URL of the anonymous survey has now been copied to the Clipboard. Now, navigate to the web page and insert that link wherever. The anonymous survey can be associated with an image or text, by adjusting the html around the link.

Every time someone clicks on the link, an anonymous survey activity will be created. If the survey is filled out, a completed date will appear. If the survey is not filled out and the respondent had simply left the page, a completed date populate. These anonymous survey activities can be viewed under the Survey Activities of the survey itself.

Once on the Survey, navigate to Survey Activities.



The View should appear similar to as follows:

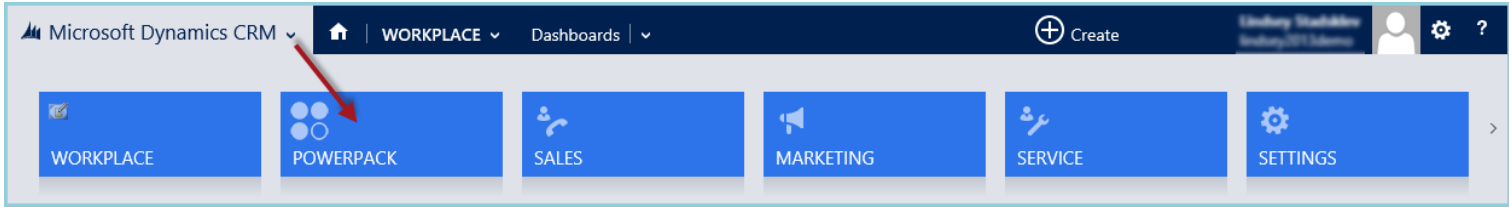


Viewing Survey Responses

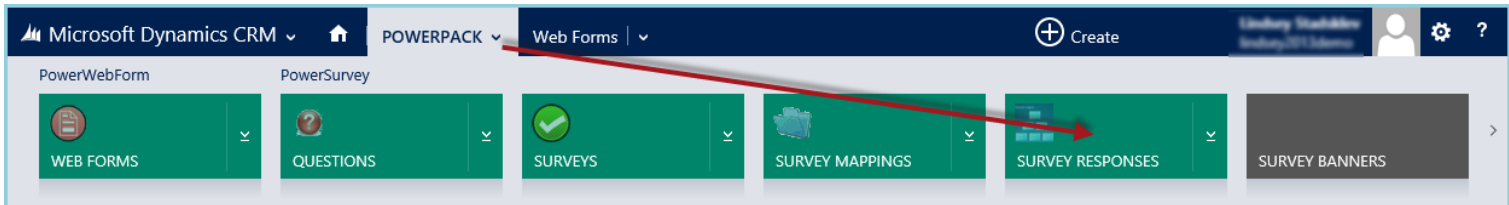
Survey responses can be found in a few different places in CRM:

1. Via PowerSurvey

Navigate to PowerPack.



Navigate to Survey Responses.



This view will display: The PowerSurvey, what that Survey Activity is regarding, the Question, the Question Answer, and the Created On date. This view shows all responses to surveys that have been sent out.

The screenshot shows the Microsoft Dynamics CRM Survey Responses view. The table displays the following data:

Survey (Survey Activity)	Regarding (Survey Activity)	Question	Answer	Created On
Customer Service Survey	Lindsey Stadsklev	How would you rate the experience you had at our restau...	10	9/17/2014 1:31 PM
Customer Service Survey	Lindsey Stadsklev	What is your experience with CRM?...	TOOONS!	9/17/2014 1:31 PM
PowerSurvey Add-On Survey	Buffy Summers	What is your experience with CRM?...	I have used it daily at work but haven't gone much beyon...	9/17/2014 1:57 PM
PowerSurvey Add-On Survey	Buffy Summers	Where did you hear about PowerSurvey?...	I am a PowerSuccess subscriber. Add-ons are included for...	9/17/2014 1:57 PM
PowerSurvey Add-On Survey	Buffy Summers	How has PowerSurvey benefited your business?...	We are able to collect necessary feedback and informatio...	9/17/2014 1:57 PM
PowerSurvey Add-On Survey	Buffy Summers	Have you tried other add-ons?...	Yes	9/17/2014 1:57 PM
PowerSurvey Add-On Survey	Buffy Summers	How would you rate the usability of PowerSurvey?...	10	9/17/2014 1:57 PM
PowerSurvey Add-On Survey	Buffy Summers	Would you like someone to contact you with more inform...	Yes	9/17/2014 1:57 PM
PowerSurvey Add-On Survey	Buffy Summers	What is your experience with CRM?...	Mucho	9/22/2014 3:56 PM
PowerSurvey Add-On Survey	Buffy Summers	Where did you hear about PowerSurvey?...	From the PowerObjects website.	9/22/2014 3:56 PM
PowerSurvey Add-On Survey	Buffy Summers	How has PowerSurvey benefited your business?...	We can easily collect feedback on customer service and c...	9/22/2014 3:56 PM
PowerSurvey Add-On Survey	Buffy Summers	Have you tried other add-ons?...	Yes	9/22/2014 3:56 PM
PowerSurvey Add-On Survey	Buffy Summers	How would you rate the usability of PowerSurvey?...	10	9/22/2014 3:56 PM
PowerSurvey Add-On Survey	Buffy Summers	Would you like someone to contact you with more inform...	Yes	9/22/2014 3:56 PM
PowerSurvey Add-On Survey	Buffy Summers	Would you recommend PowerSurvey to a friend or collea...	yep yep	9/22/2014 3:56 PM
PowerSurvey Add-On Survey	Buffy Summers	Is there other functionality you would like added to Powe...	More templates	9/22/2014 3:56 PM
PowerSurvey Add-On Survey	Buffy Summers	What is your experience with CRM?...	I love CRM	9/22/2014 3:57 PM
PowerSurvey Add-On Survey	Buffy Summers	Where did you hear about PowerSurvey?...	PowerUP	9/22/2014 3:57 PM

2. Via the Record in CRM

Once a survey has been sent to someone, a survey activity will now be associated with their record in CRM. If the survey is set regarding a contact, the survey activity will appear on the contact record. If you set the survey regarding a case, the survey activity will appear on the case record.

a. On the Record

When the record in question is opened, activities may be viewed from here. Click the Activities tab. This will display all recent activities related to the record. Open the Activity to view responses and details in regards to the Survey.

The screenshot displays a CRM record for a contact named Buffy Summers. The record is divided into two main sections: 'CONTACT INFORMATION' and 'ACTIVITIES'.

CONTACT INFORMATION:

- Full Name*: Buffy Summers
- Contact ID: 08-Sep-2014 Contact 00505
- Job Title: The Slayer
- Company Name: The Watcher's Council
- Email: lindsey.stadsklev@powerobje...
- Business Phone: 651-612-8267
- Mobile Phone: 1-800-468-8267
- Reward Code: KCFUTBQ

ACTIVITIES:

- Activity 1: Lindsey Stadsklev, Tell us why you love PowerSurvey! PowerObjects:00040046, Yesterday. (Block icon)
- Activity 2: Lindsey Stadsklev, Tell us why you love PowerSurvey! PowerObjects:00040079, Yesterday. (Block icon)
- Activity 3: Lindsey Stadsklev, PowerObjects:00040064, Yesterday. (Block icon)
- Activity 4: Lindsey Stadsklev, Tell us why you love PowerSurvey! PowerObjects:00040046, Yesterday. (Block icon)
- Activity 5: Tell us why you love PowerSurvey! <p>Good Afternoon Buffy!</p> Completed by Lindsey Stadsklev, Yesterday. (Colorful icon)
- Activity 6: Lindsey Stadsklev, Anonymously take this Survey PowerObjects:00040072, Yesterday. (Block icon)
- Activity 7: PowerSurvey Add-On Survey, COMPLETE, Modified by Lindsev Stadsklev, Yesterday. (Colorful icon)

The 'ACTIVITIES' tab is highlighted with a red box, and the entire list of activities is enclosed in a red border. The 'COMPLETE' status of the final activity is also highlighted with a red box.

Note: The Survey Activities will can be identified by the block icon to the left of the activity.

The responses will be available near the bottom of the Activity under Responses.

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation ribbon shows 'Microsoft Dynamics CRM', 'SALES', 'Contacts', and 'PowerSurvey'. The user is identified as 'Lindsey Stadskev' with the email 'lindsey2013demo'. Below the ribbon, there are action buttons: DELETE, ADD TO QUEUE, QUEUE ITEM DETAILS, SHARE, EMAIL A LINK, RUN WORKFLOW, and START DIALOG. The main content area is titled 'SURVEY ACTIVITY : INFORMATION' and 'PowerSurvey'. It shows details for a survey by 'Buffy Summers' titled 'PowerSurvey Add-On Survey', sent on 9/17/2014 at 1:52 PM and completed on 9/17/2014 at 1:57 PM. An email section shows the recipient as 'lindsey.stadsklev@powerobjects.com' and the subject as 'PowerSurvey'. The email body contains a link: 'Please click here to take an Awesome Survey!'. Below this, a 'Responses' section is highlighted with a red border, containing a table of survey responses.

Survey (Survey Activity)	Regarding (Survey Activity)	Question	Answer	Created On ↑
PowerSurvey Add-On S...	Buffy Summers	Would you like someone to contact you with more i...	Yes	9/17/2014 1:57 PM
PowerSurvey Add-On S...	Buffy Summers	What is your experience with CRM?...	I have used it daily at work but haven't gone much...	9/17/2014 1:57 PM
PowerSurvey Add-On S...	Buffy Summers	Where did you hear about PowerSurvey?...	I am a PowerSuccess subscriber. Add-ons are includ...	9/17/2014 1:57 PM
PowerSurvey Add-On S...	Buffy Summers	How has PowerSurvey benefited your business?...	We are able to collect necessary feedback and infor...	9/17/2014 1:57 PM
PowerSurvey Add-On S...	Buffy Summers	Have you tried other add-ons?...	Yes	9/17/2014 1:57 PM
PowerSurvey Add-On S...	Buffy Summers	How would you rate the usability of PowerSurvey?...	10	9/17/2014 1:57 PM

At the bottom of the responses section, the status is 'Completed'.

b. Via the Navigation Ribbon

Navigate to the record in question. Once on the record, navigate to Activities.

The screenshot shows the Microsoft Dynamics CRM navigation ribbon. The user is currently viewing the 'Buffy Summers' record. The ribbon includes buttons for 'Common', 'ACTIVITIES', 'ENTITLEMENTS', 'SOCIAL PROFILES', 'CONNECTIONS', and 'AUDIT HISTORY'. A red arrow points from the 'Buffy Summers' record in the navigation pane to the 'ACTIVITIES' button on the ribbon.

Set the criteria to view the time frame needed. This view displays all activities in the set up parameters. Notice that the type of activity is identified, as well as if the activity is open or completed. When the Survey Activity is complete, the responses will be available by opening the record.

Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date	Due Date
TEST!!!	Buffy Sum...	Survey Activity	Open	Lindsey Stads	Normal		
PowerSurvey	Buffy Sum...	Survey Activity	Completed	Lindsey Stads	Normal		
Tell us why you love PowerS...	Buffy Sum...	Survey Activity	Completed	Lindsey Stads	Normal		
PowerSurvey Add-On Survey	Buffy Sum...	Survey Activity	Open	Lindsey Stads	Normal		
How much do you love Powe...	Buffy Sum...	Survey Activity	Open	Lindsey Stads	Normal		
I Love CRM!	PowerObjec...	E-mail	Completed	Lindsey Stads	Normal		
We Love CRM! CRM:00040001	PowerObjec...	E-mail	Completed	Lindsey Stads	Normal		
PowerSuccess Rocks! Power...	PowerObjec...	E-mail	Completed	Lindsey Stads	Normal		
PowerUp is almost here! Po...	PowerObjec...	E-mail	Completed	Lindsey Stads	Normal		
PowerUp is almost here! Pow...	PowerObjec...	E-mail	Completed	Lindsey Stads	Normal		
come on... PowerObjects:000...	PowerObjec...	E-mail	Completed	Lindsey Stads	Normal		
test PowerObjects:00040006	PowerObjec...	E-mail	Completed	Lindsey Stads	Normal		
PowerObjects:00040018	PowerSucc...	E-mail	Completed	Lindsey Stads	Normal		
PowerObjects:00040020	PowerSucc...	E-mail	Completed	Lindsey Stads	Normal		
We Love CRM! PowerObjects...	PowerObjec...	E-mail	Completed	Lindsey Stads	Normal		

Open the desired record to review the Survey Responses.

SURVEY ACTIVITY : INFORMATION

Tell us why you love PowerSurvey!

Regarding **Buffy Summers**
 Survey **PowerSurvey Add-On Survey**
 Survey Sent **9/18/2014 5:18 PM** Survey Completed **9/22/2014 4:30 PM**

Email

To Email **lindsey.stadsklev@powerobjects.com** To Name **Buffy Summers**
 Subject **Tell us why you love PowerSurvey!**

Good Afternoon Buffy!
 We hope you are enjoying PowerSurvey! We would appreciate your feedback in regards to your experience with this product and your success and troubles along the way. If you need any assistance or have any questions, shoot us an email at powerpacksupport@powerobjects.com. Thank you for your help and have a wonderful day!
 CRM
[Please click here to take an Awesome Survey!](#)

Survey (Survey Activity)	Regarding (Survey Activity)	Question	Answer	Created On ↑
PowerSurvey Add-On S...	Buffy Summers	Would you recommend PowerSurvey to a friend or...	duh	9/22/2014 4:30 PM
PowerSurvey Add-On S...	Buffy Summers	Is there other functionality you would like added to...	:)	9/22/2014 4:30 PM
PowerSurvey Add-On S...	Buffy Summers	Where did you hear about PowerSurvey?...	Vamps	9/22/2014 4:30 PM
PowerSurvey Add-On S...	Buffy Summers	How has PowerSurvey benefited your business?...	more dead vamps	9/22/2014 4:30 PM
PowerSurvey Add-On S...	Buffy Summers	Have you tried other add-ons?...	Yes	9/22/2014 4:30 PM
PowerSurvey Add-On S...	Buffy Summers	How would you rate the usability of PowerSurvey?...	10	9/22/2014 4:30 PM

Status Reason **Completed**

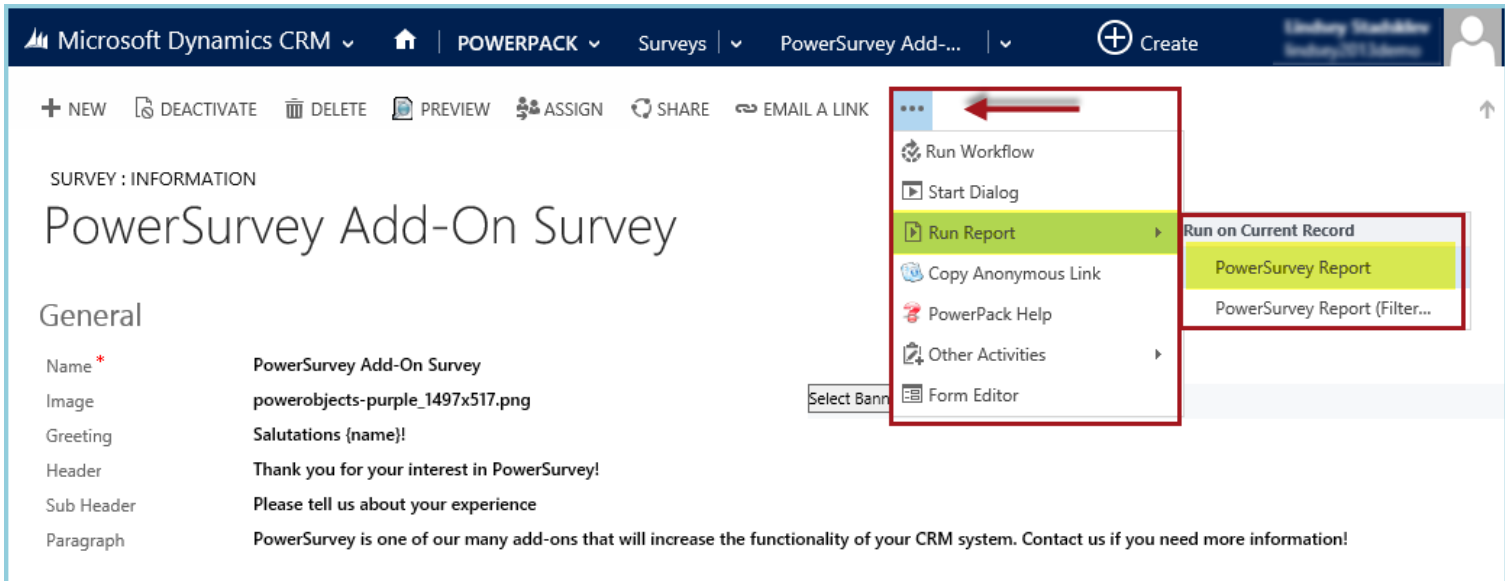
3. Reports

There are two reports that are imported into CRM when the PowerSurvey solution is imported.

a. PowerSurvey Report

This report will provide a summary of how the survey questions were answered (Responses). The type of graph displayed will depend on the type of survey question.

Navigate to the survey that needs a report to summarize responses. Once on the correct Survey record, click the Ellipse. From the drop down, click on Run Report. Select PowerSurvey Report.



The report may take a little bit of time to load. If the report doesn't seem to be generating, try to edit the filter and run the report again. Even if the criteria is not changed, it will push the report to generate if it had been stalling before the filter had been selected for edit.

Edit Filter

From Date NULL

To Date NULL

Survey PowerSurvey Add-On Survey

1 of 2 100% Find | Next

PowerSurvey Add-On Survey

Total Survey Activities Sent: 28

Total Survey Activities Completed: 7

1. What is your experience with CRM?

Name	Answer
Buffy Summers	I have used it daily at work but haven't gone much beyond that.
	Mucho
	I love CRM
	PowerObjects Expert
	Tons
	PowerObjects Bootcamp and other educational events, such as PowerUP.
Buffy Summers	Slaying

2. Where did you hear about PowerSurvey?

Name	Answer
Buffy Summers	I am a PowerSuccess subscriber. Add-ons are included for free and our PowerSuccess engineer recommended it as a solution sto a business problem.
	From the PowerObjects website.
	PowerUP
	From a colleague.
	PowerUP
	Through my PowerSuccess Engineer
Buffy Summers	Vamps

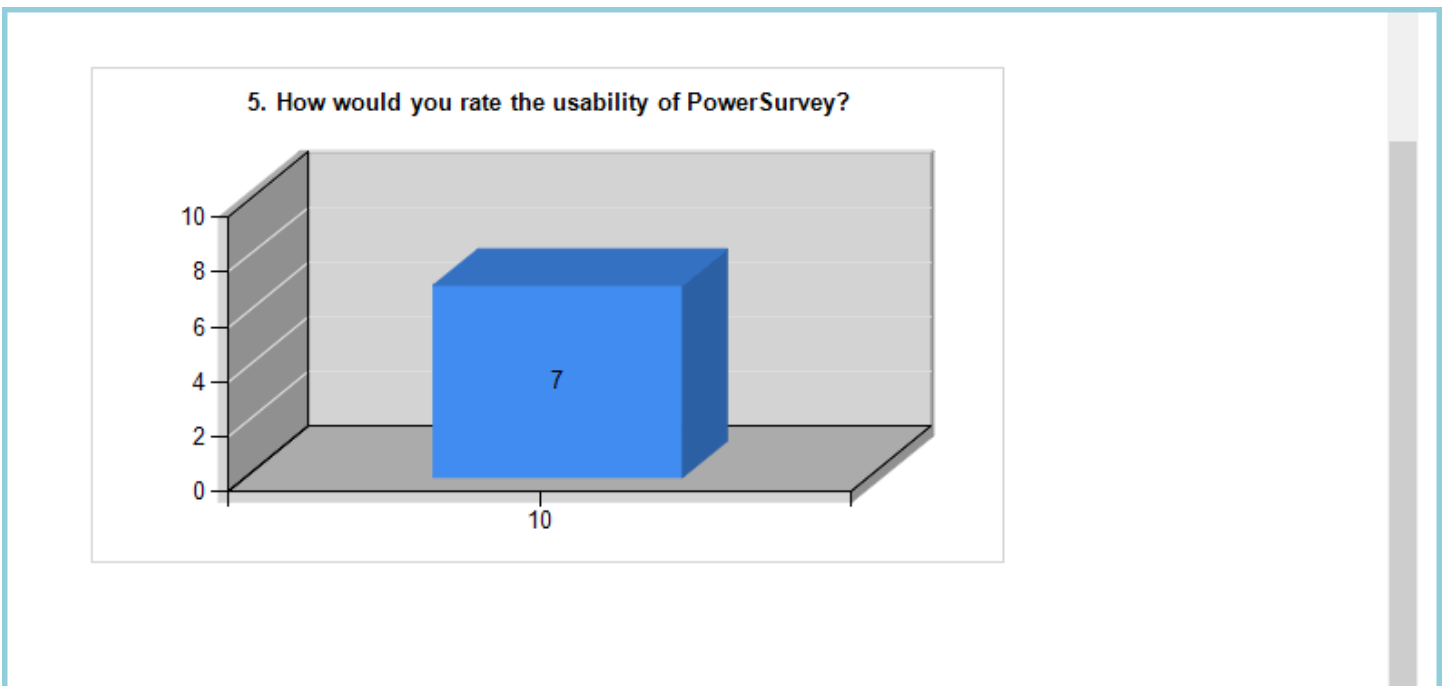
The report will summarize each question as well as provide graphical representations of the Survey Data. Again, the type of summary depends on the Type of question. In the below examples, the question types are Text Box and 1-10 Rating. The Text Box displays the answers via text while the numerical 1-10 Rating Type uses a graph.

Text Box:

3. How has PowerSurvey benefited your business?	
Name	Answer
Buffy Summers	We are able to collect necessary feedback and information from the recipients of the surveys; it is quick and easily. Before, we had to call everyone.
	We can easily collect feedback on customer service and can now track all of the responses in CRM.
	Reporting
	in many ways
	Added functionality
	Added functionality to CRM in regards to storing data related to surveys. We use to call and ask for feedback, now the process is completely automated and we have all the data in CRM!
Buffy Summers	more dead vamps

4. Have you tried other add-ons?	
Name	Answer
Buffy Summers	Yes
	Yes
	Yes
	Yes
	I Don't Know
	Yes
Buffy Summers	Yes

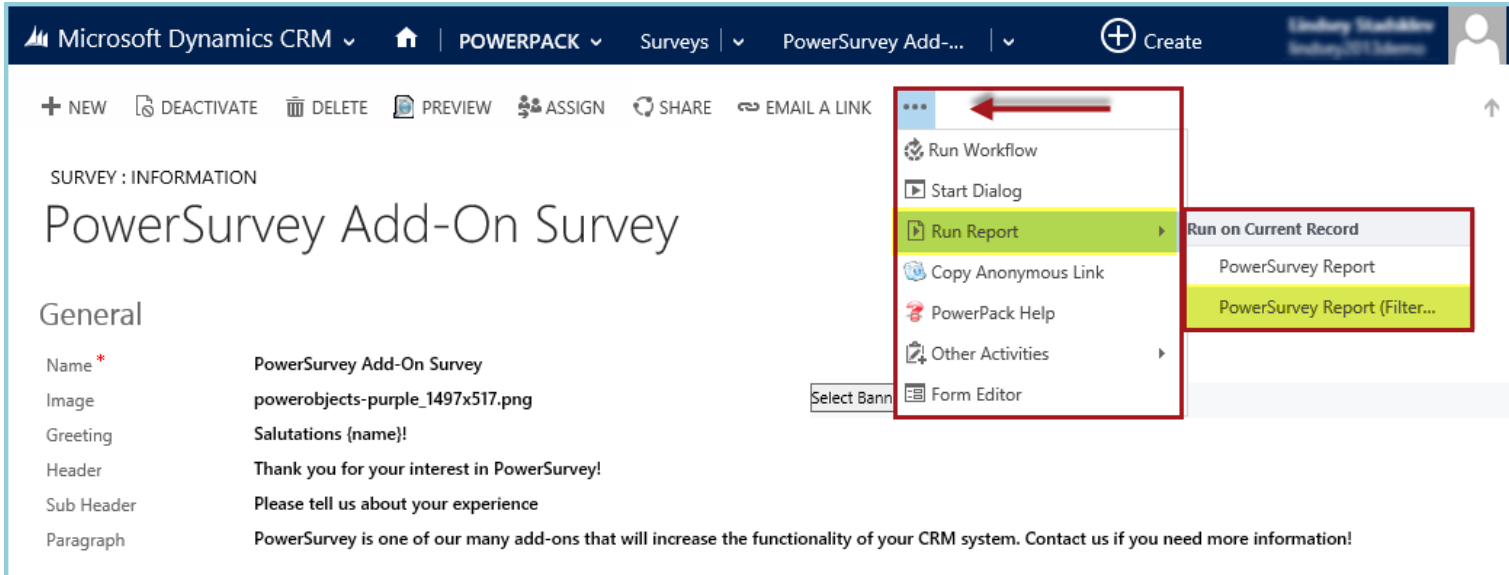
1-10 Rating:



b. PowerSurvey Report Filtered by Contact

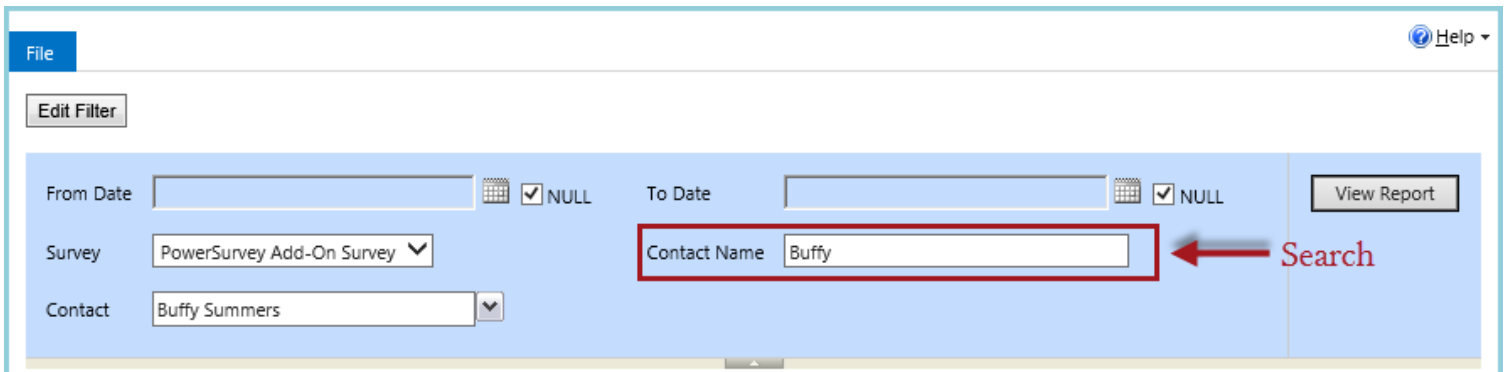
The other report that is automatically imported into CRM when the PowerSurvey solution is imported will filter survey responses by a specific contact in CRM.

Navigate to the survey that requires the contact specific report. Once on the correct Survey record, click the Ellipse. From the drop down, click on Run Report. Select PowerSurvey Report (Filtered by Contact).



The screenshot shows the Microsoft Dynamics CRM interface for a survey record titled "PowerSurvey Add-On Survey". The top navigation bar includes "Microsoft Dynamics CRM", "POWERPACK", "Surveys", and "PowerSurvey Add-...". The main content area displays the survey information, including the name "PowerSurvey Add-On Survey" and various fields like "Name", "Image", "Greeting", "Header", "Sub Header", and "Paragraph". A context menu is open over the survey record, showing options such as "Run Workflow", "Start Dialog", "Run Report", "Copy Anonymous Link", "PowerPack Help", "Other Activities", and "Form Editor". The "Run Report" option is highlighted, and a sub-menu is visible, showing "Run on Current Record", "PowerSurvey Report", and "PowerSurvey Report (Filter...)", with the latter being selected. A red arrow points to the ellipsis menu icon, and another red arrow points to the "PowerSurvey Report (Filter...)" option.

Enter in text from the contact in question in the Contact Name field. After typing the text, tab over to pull up a look up of the possible contacts in the Contact field.



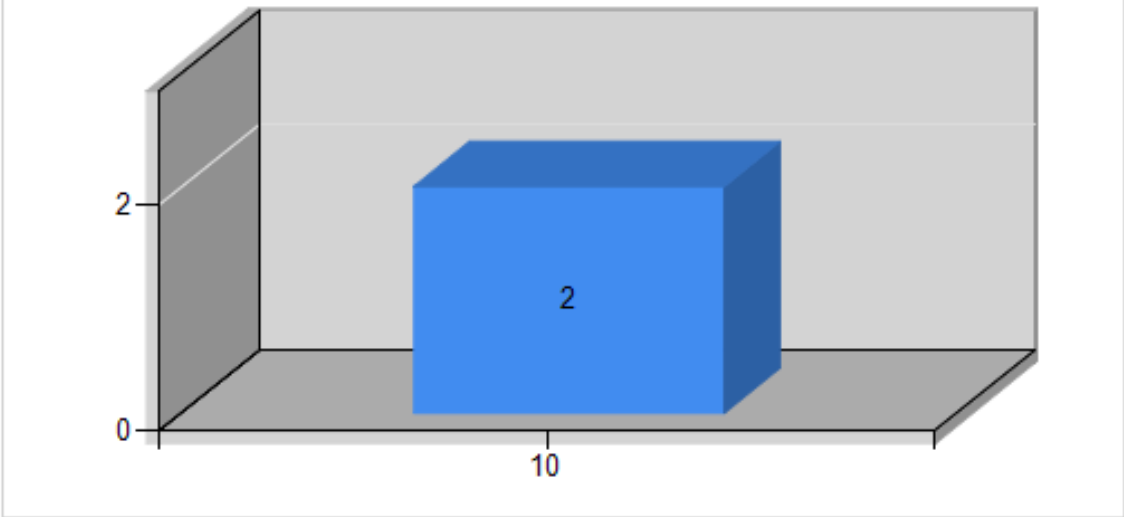
The screenshot shows the PowerSurvey report filter interface. It includes a "File" tab, an "Edit Filter" button, and a "View Report" button. The filter fields are: "From Date" (with a calendar icon and a "NULL" checkbox), "To Date" (with a calendar icon and a "NULL" checkbox), "Survey" (set to "PowerSurvey Add-On Survey"), "Contact Name" (set to "Buffy"), and "Contact" (set to "Buffy Summers"). A red box highlights the "Contact Name" field, and a red arrow points to it with the word "Search" next to it.

When the correct contact is chosen. Select View Report.

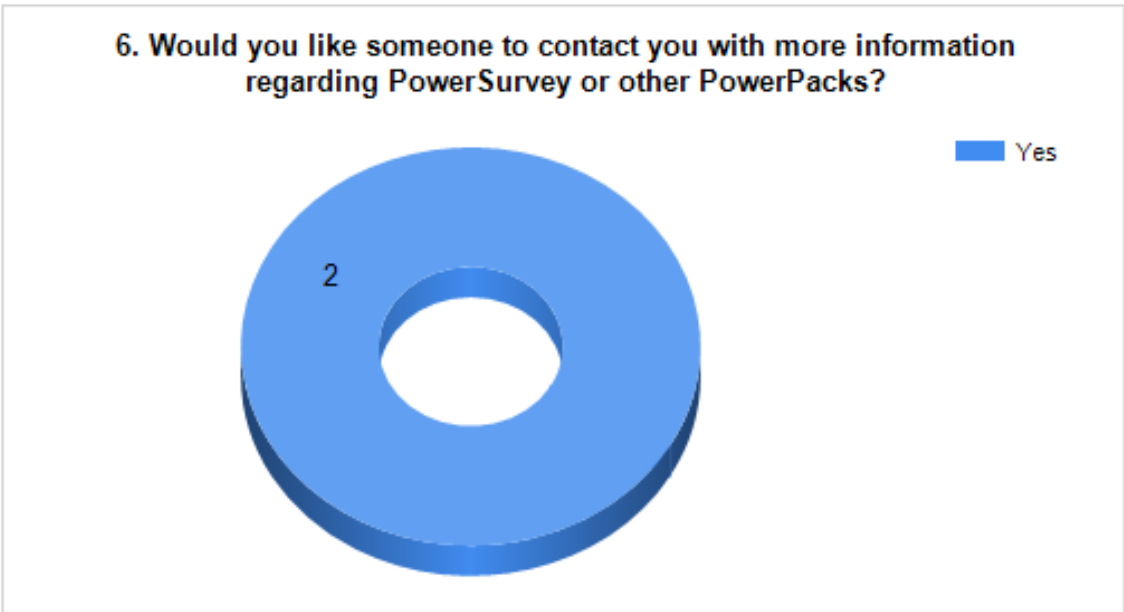
The report will look similar to below:

PowerSurvey Add-On Survey	
Total Survey Activities Sent: 5	
Total Survey Activities Completed: 2	
1. What is your experience with CRM?	
Name	Answer
Buffy Summers	I have used it daily at work but haven't gone much beyond that.
Buffy Summers	Slaying
2. Where did you hear about PowerSurvey?	
Name	Answer
Buffy Summers	I am a PowerSuccess subscriber. Add-ons are included for free and our PowerSuccess engineer recommended it as a solution to a business problem.
Buffy Summers	Vamps
3. How has PowerSurvey benefited your business?	
Name	Answer
Buffy Summers	We are able to collect necessary feedback and information from the recipients of the surveys; it is quick and easily. Before, we had to call everyone.
Buffy Summers	more dead vamps
4. Have you tried other add-ons?	
Name	Answer
Buffy Summers	Yes
Buffy Summers	Yes

5. How would you rate the usability of PowerSurvey?



6. Would you like someone to contact you with more information regarding PowerSurvey or other PowerPacks?



Note: This report will only work if you are sending surveys to a contact in your CRM (where the regarding of the survey activity is set to the contact).

Here is an example of the finished Survey that was used throughout the guide:

POWER OBJECTS

Salutations Daenerys Targaryen!

Thank you for your interest in PowerSurvey!
Please tell us about your experience

PowerSurvey is one of our many add-ons that will increase the functionality of your CRM system. Contact us if you need more information!

PowerSurvey Add-On Survey

1 What is your experience with CRM?

For example: how long have you worked with CRM, what are you comfortable doing in CRM, how do you use it daily, etc.

2 Where did you hear about PowerSurvey? *

3 How has PowerSurvey benefited your business? *

4 Have you tried other add-ons?

Yes
 No
 I Don't Know

Also referred to as PowerPacks.

5 How would you rate the usability of PowerSurvey?

Very Difficult Super Easy

1 2 3 4 5 6 7 8 9 10

6 Would you like someone to contact you with more information regarding PowerSurvey or other PowerPacks?

Yes
 No

7 Would you recommend PowerSurvey to a friend or colleague?

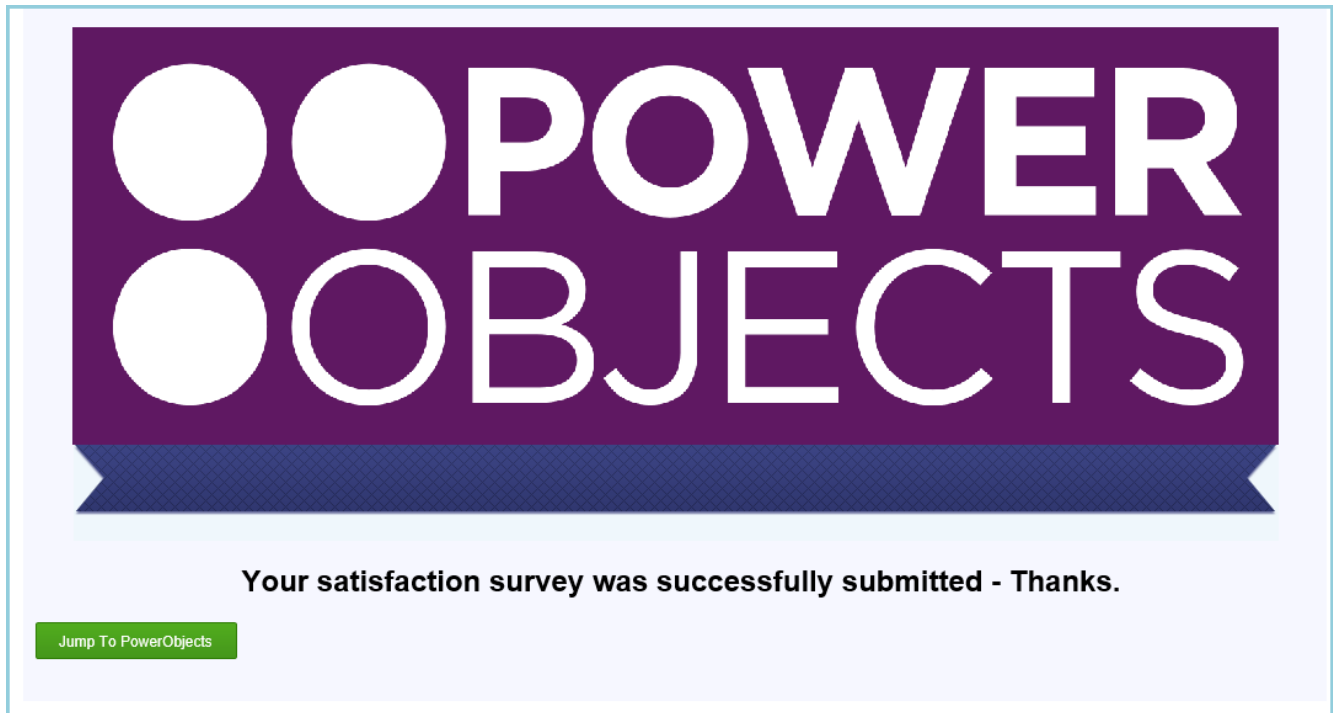
Why or why not?

8 Is there other functionality you would like added to PowerSurvey? If so, what?

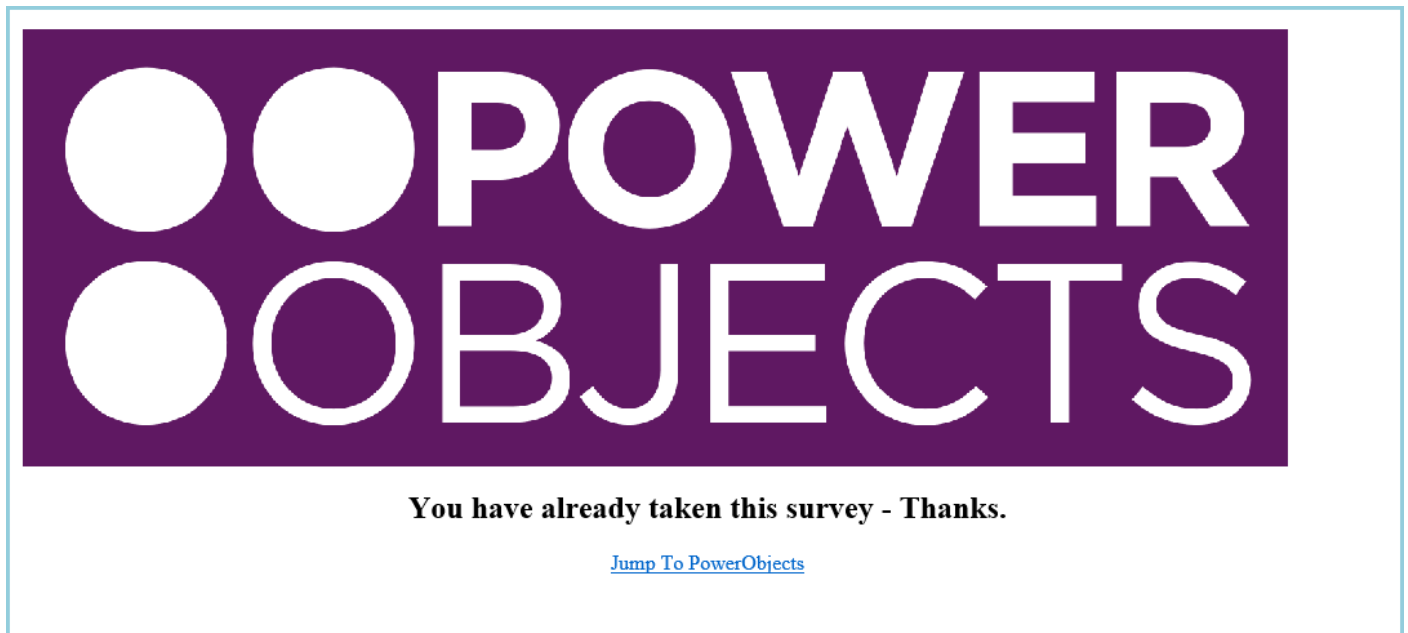
what more would you like it to do

612-339-3355

Upon completion:



If a recipient has already taken the survey:



Thanks for your interest in PowerSurvey. Should you have any questions, contact us at 612-339-3355 or e-mail powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of installation. 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 our [blog](#) or subscribe to our [newsletter](#).