POWER OBJECTS

USER GUIDE

PowerSurveyPlus

CRM 2013 | 2015

Service Support Education Add-ons

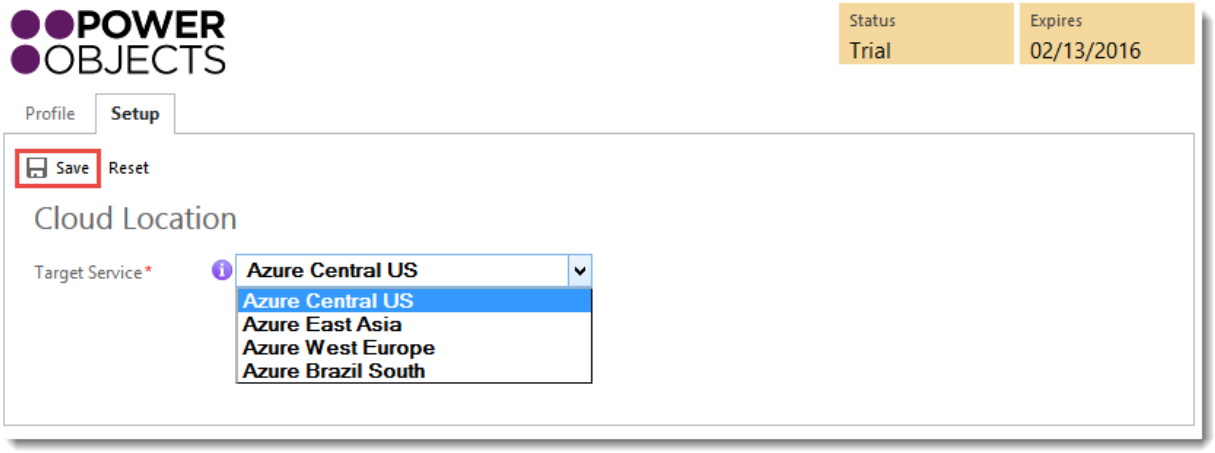
Contents

Overview

With PowerObjects' surveying solution Microsoft Dynamics CRM users can easily build robust surveys right from within their CRM system and send them directly to their Accounts, Contacts, and Lead records. Once a survey recipient has filled out the survey it will create a survey activity in CRM, regarding the recipient, with the answers that were given during the survey.

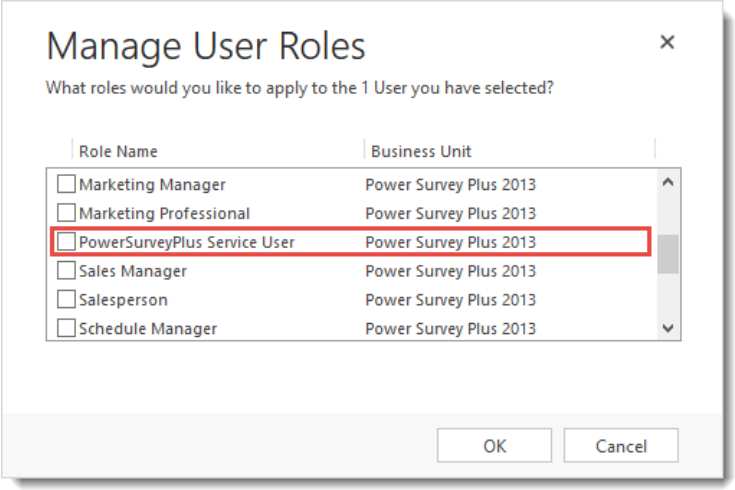
Configuring PowerSurveyPlus

Once PowerSurveyPlus has been imported and registered you will have to choose the Target Service you would like PowerSurveyPlus to be hosted through. PowerSurveyPlus users have the option to choose from four different Azure clouds; Central US, East Asia, West Europe, and Southern Brazil. Once you have selected your target service make sure that you select Save before navigating away from the screen.



Security Roles

The user who is entered in the PowerSurveyPlus configuration will need to be a system admin or have the PowerSurveyPlus Service User role assigned to them. This user is used to write survey activities back into CRM.



Creating a Survey with PowerSurveyPlus

This section will go through the steps necessary to create a Survey with PowerSurveyPlus' designer. First, navigate to the **Surveys** section of the PowerSurveyPlus area and select **New**. Proceed to fill out the details of the Survey Form, when completed press **Save**.

Survey Information

Name

The Name field is a required field, which allows users in CRM to differentiate each survey created. The survey should have a 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.

Survey Link Text

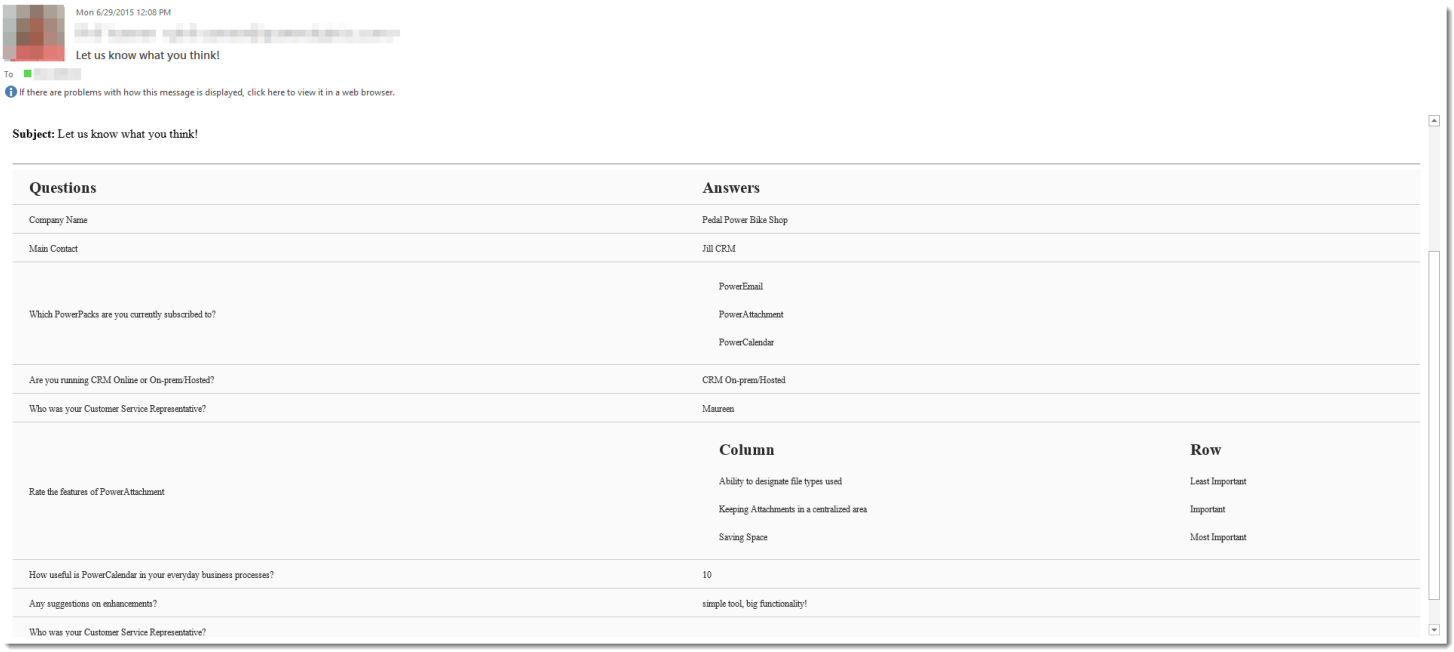
The text entered here will be displayed in place of the URL that is entered in the **Jump to URL** field.

Campaign

In order to have a campaign response created each time someone fills out a survey, choose to associate the Survey record to a campaign.

Email Submitted Survey To

Use this field to denote a specific email address or distribution list to have a survey's responses sent directly to their inboxes. The notification email will look similar to the email below:



Mon 6/29/2015 12:08 PM

Let us know what you think!

To

If there are problems with how this message is displayed, click here to view it in a web browser.

Subject: Let us know what you think!

Questions	Answers	
Company Name	Pedal Power Bike Shop	
Main Contact	Jill CRM	
Which PowerPacks are you currently subscribed to?	PowerEmail PowerAttachment PowerCalendar	
Are you running CRM Online or On-prem/Hosted?	CRM On-prem/Hosted	
Who was your Customer Service Representative?	Maureen	
Rate the features of PowerAttachment	**Column**	**Row**
	Ability to designate file types used	Least Important
	Keeping Attachments in a centralized area	Important
	Saving Space	Most Important
How useful is PowerCalendar in your everyday business processes?	10	
Any suggestions on enhancements?	simple tool, big functionality!	
Who was your Customer Service Representative?		

Configurable Text

Navigation

Prior Text

If you have a multiple page survey and you do not wish to use the default "prior" button, you can choose what the button says, such as "back."

Next Text

If you have a multiple page survey and you do not wish to use the default "next" button, you can choose what the button says, such as "next page."

Submit Text

If you would like the "submit" button to say something else, enter the new text in this field.

Expired or Already Completed Survey

Expiration Date

If you would like to put a time limit on when a survey must be answered by you can use the Expiration Date field. Whichever date is denoted in this field will become the survey's expiration.

Expired Survey Message

If you have setup a survey with an expiration date, you will need to enter an Expired Survey Message. This message will be displayed when a respondent clicks on a survey after the expiration has passed.

Survey Already Completed

If a survey has already been responded to and the respondent forwards or tries to click the survey link again the text entered in this field – letting the respondent know that they have already completed the survey.

Survey Completed

Completed Message

When a respondent submits a survey, they solution will automatically refresh their page that informs the respondent that the survey has been completed and successfully submitted. You will want to use this field to write out that messaging.

Jump to URL

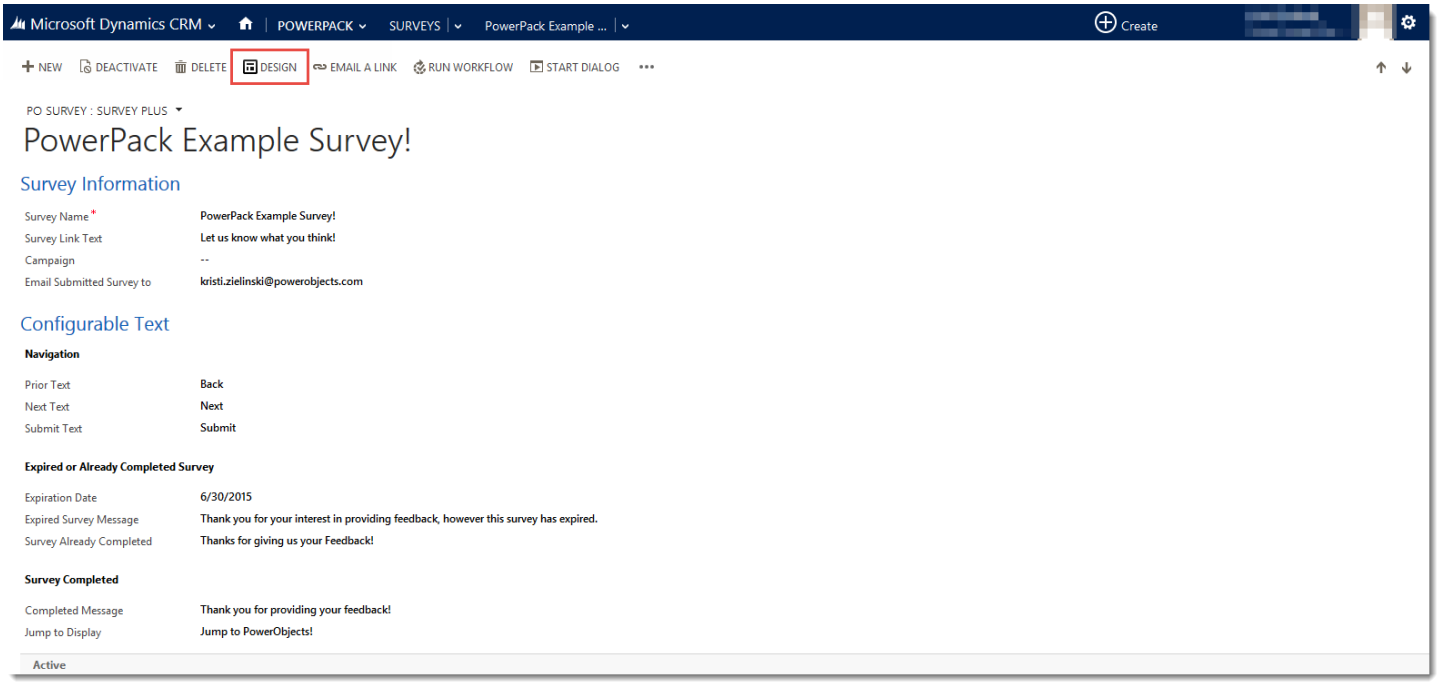
The URL entered in this field will be placed on the **Survey Completed** screen, the actual URL will be hidden behind the Survey Link Text.

CSS

Under the CSS section CRM users are able to copy and paste their own CSS. Adding CSS will make the survey look more custom and fit the organization's branding. If you choose not to use CSS the survey created in the designer will have default styling.

The Designer

After a survey has been saved, a button labeled **Design** will appear on the ribbon allowing you to open the designer.



Selecting the **Design** button will open a new tab in your browser and display a blank survey. Before you begin building your survey it will be helpful to understand the individual parts of a survey in PowerSurveyPlus.

Pages

All surveys must have at least one page, if users would like to create multiple page surveys they can do so by adding additional pages. Pages contain sections, which contain the actual questions. When creating a page users have the following options:

Name

The name field will be displayed at the top of the designer as a tab. This field just simply serves the purpose of being an identifier of the page you are working on in the designer. It will not be shown on the actual survey being taken by respondents.

Header

The header field is a section where you can add a label or title to the top of the page, by default this text is centered and bold.

Sub Header

The sub header gives more space for text. The sub header is displayed directly underneath the header field and is centered by default.

Paragraph

The paragraph section gives users the ability to add multiple lines of text to the top of the page. The paragraph is displayed under the sub header field and is aligned to the left by default.

Footer

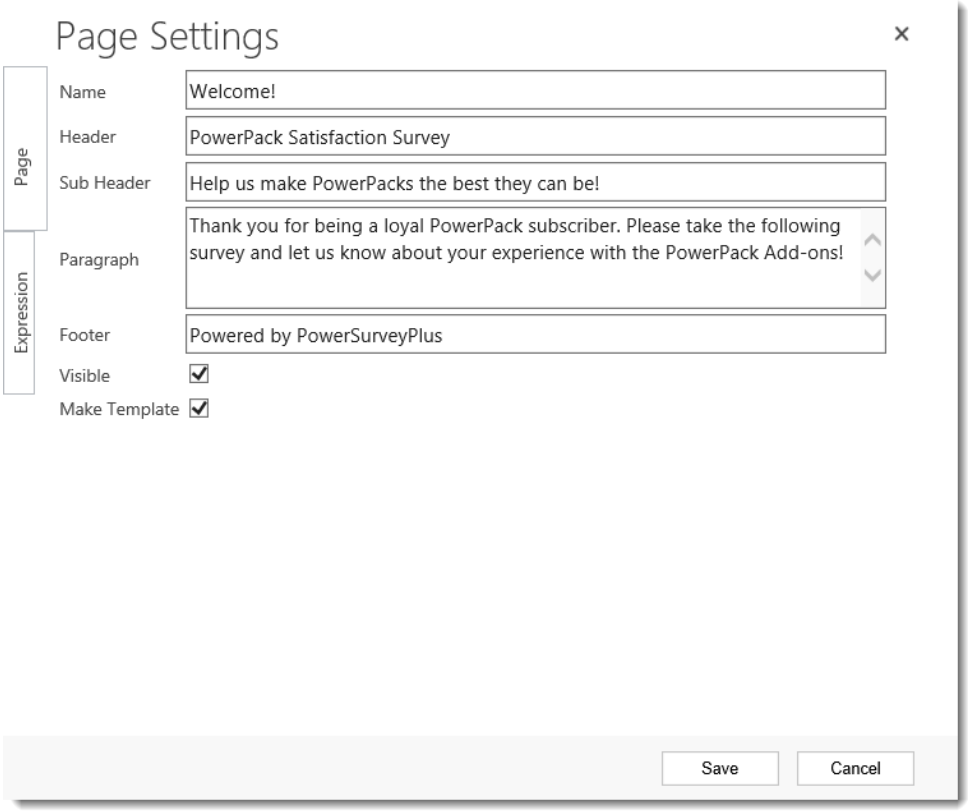
To add a footer to the bottom of the page use the footer field. The footer text is displayed at the very bottom of the page and the text is aligned to the left by default.

Visible

If you would like the page to be visible by default you will want to make sure the **Visible** check box is checked. If you are using the page with an expression you will want to have the visible check box unchecked. For more information on expressions please jump to the Expressions section.

Make Template

If you would like to reuse the current page for other surveys you will want to make sure the **Make Template** check box is checked. If you do not plan on reusing the page you will leave the check box unchecked. For more information on templates please see the Template section of this guide.

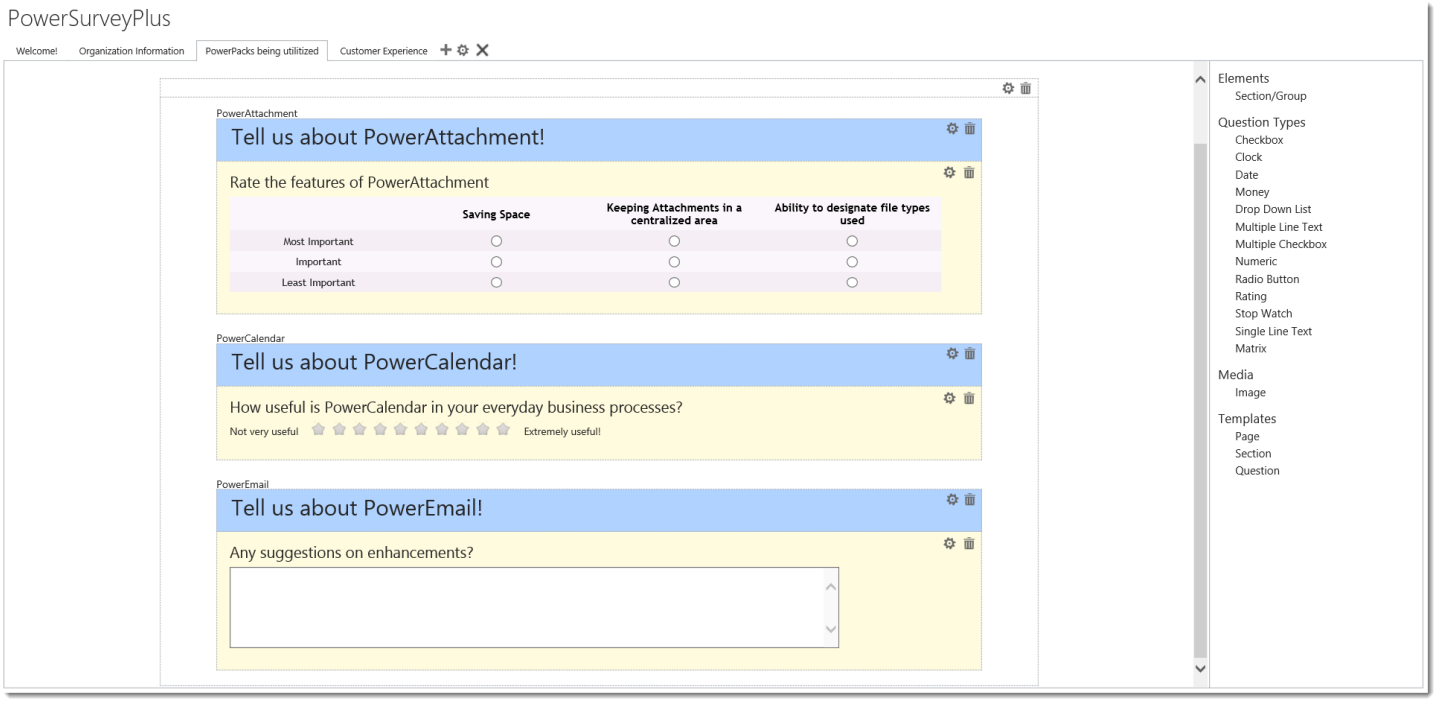


Once you have selected **Save** the following fields will look like such on your Survey Page:

Sections

Sections are an important part of PowerSurveyPlus; this is where users will create their questions. Sections can be useful for grouping questions by subject matter and can be made visible or hidden based on the answers previously answered. For more information on how to make sections visible or hidden please see the expressions section of the guide.

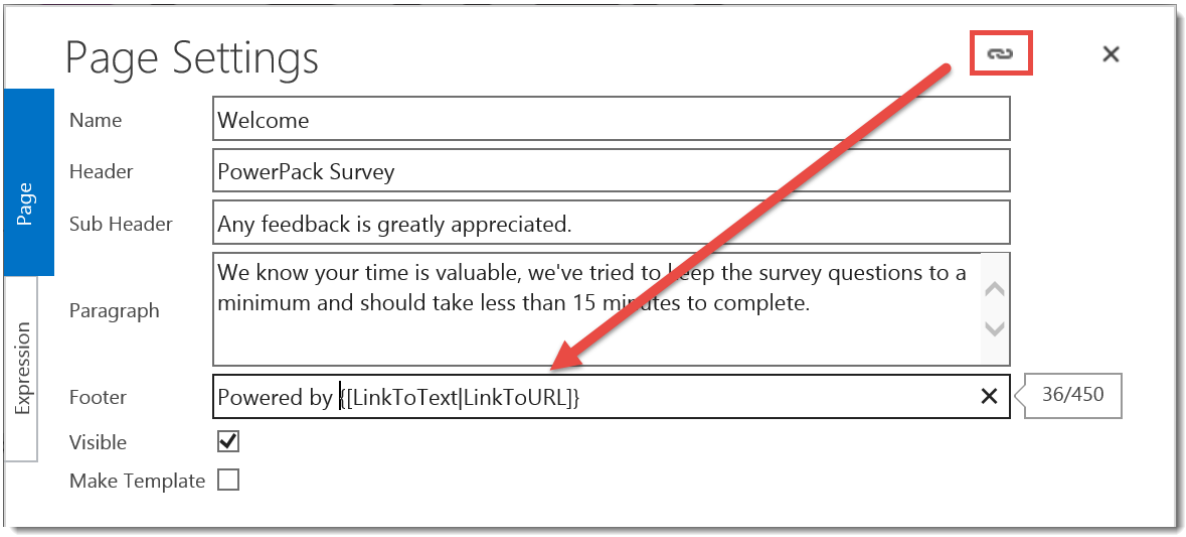
A survey can have multiple sections on one page as shown in the screen shot below:

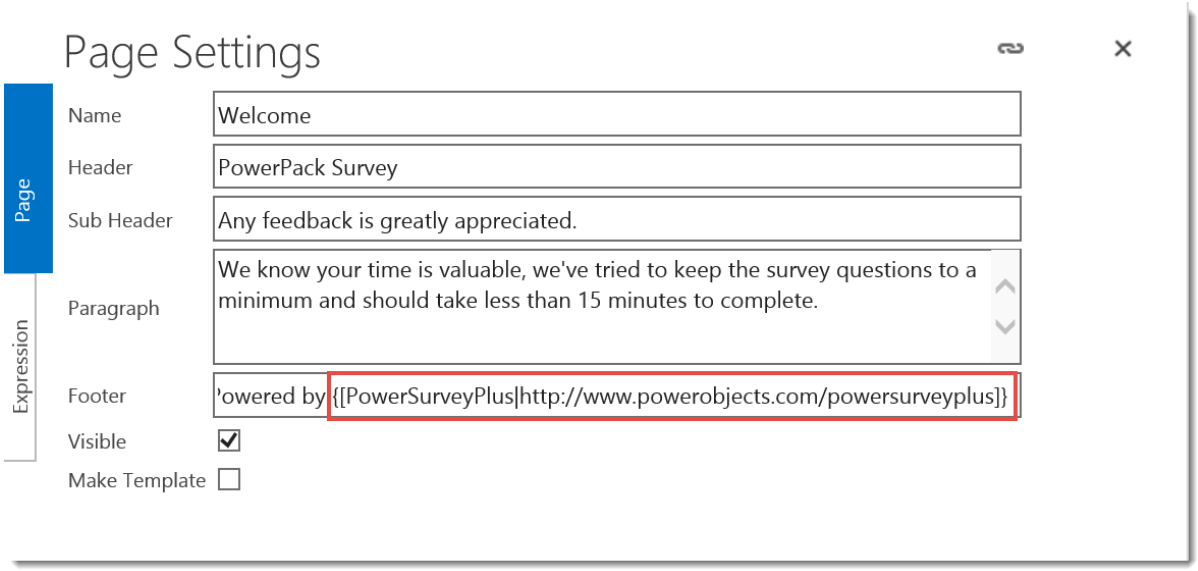


Another useful piece of functionality for sections is that they can be made **repeatable.** A repeatable section allows users to copy the section repeatedly throughout the survey, so they can add additional information for the same question. An example of this would be "Job Experience," people will likely have had multiple jobs in the past, by making the section repeatable they can enter each Job Experience without the survey designer having to denote how many Job Experiences they want the survey respondent to be able to enter. All the questions within a repeatable section will appear again in the new section. Repeatable functionality is only available for sections.

Adding a hyperlink

Users can add hyperlinks to the text fields of the page, section, or question settings by selecting the link icon in the upper right corner. The hyperlink token {[LinkToText|LinkToURL]} will be added to the location of the curser and user will need to replace the words "LinkToText" with the hyperlink text and the words "LinkToURL" with the website URL they'd like to add.





Question Types

Questions are the heart of the survey. Questions can only be placed inside sections, they are not placed on pages directly. Like Pages and Sections, Questions can be made visible or hidden based on the answers to previous questions in the survey. For more information on visible and hidden questions, please see the Expressions section of this guide.

Check Box

A checkbox is used when a question requires one of two possible answers. The check boxes may be left checked or unchecked. If the question is set as required, by default, it will be displayed as the "unchecked" value.

Clock

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.

Money

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.

Multiple Line Text

Multi-line text boxes are used when looking for an answer that would allow the respondent to type free form text; 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 Checkbox

Multiple checkbox 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

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. There are 3 types of rating displays to choose from, radio buttons, stars, or smiley faces.

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).

Single Line Text

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

Matrix

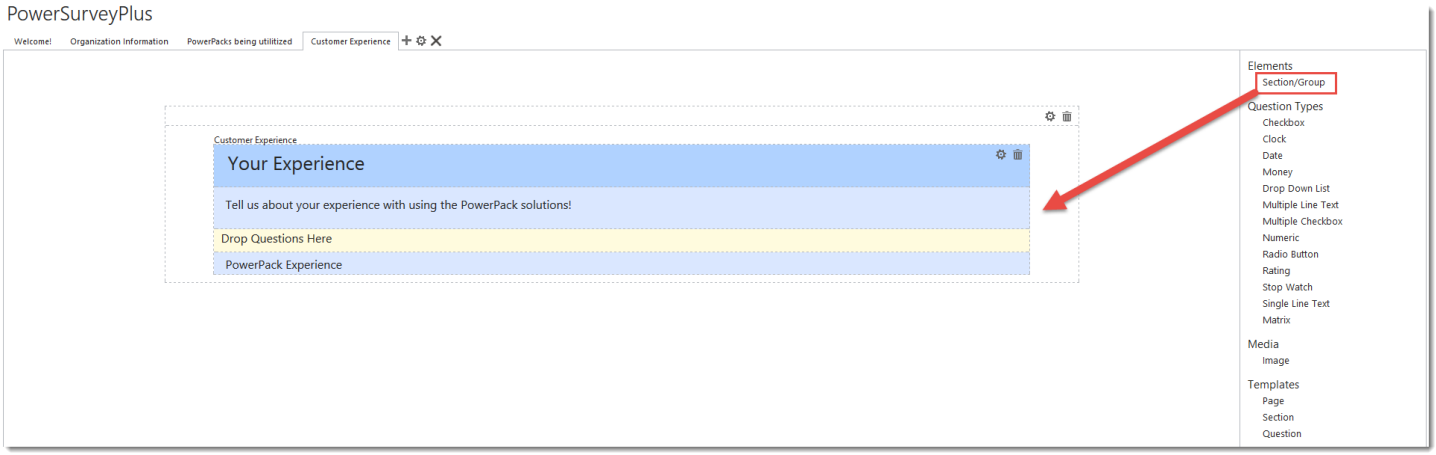
Matrix questions have rows and columns of possible responses, allowing respondents to rate multiple options in order of importance.

Creating, Editing, & Deleting Pages

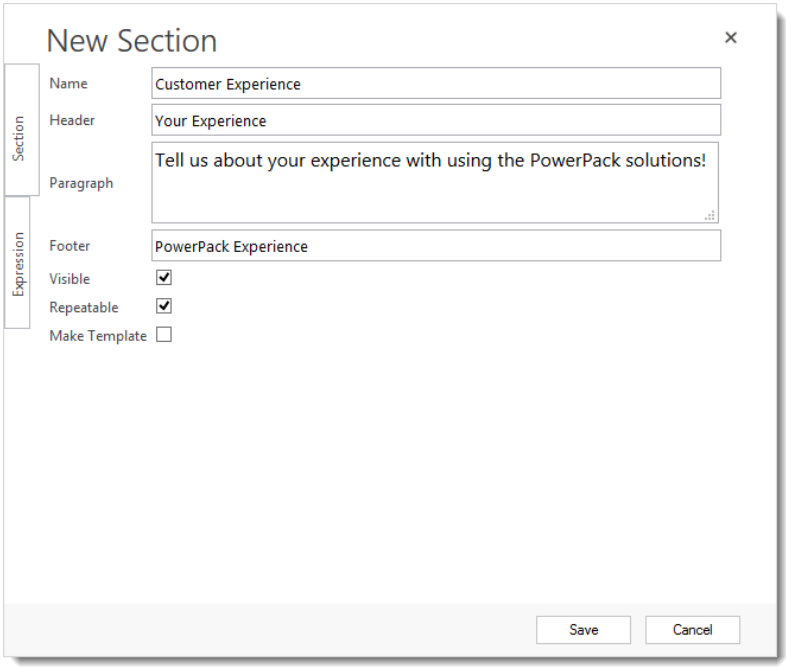
To add a page to the survey click on the plus sign shown in the top left corner of the designer. You can edit the data on a page by selecting the page tab that needs to be edited and clicking on the gear icon. If you need to delete a page select the page tab that you want to delete and select the X icon.

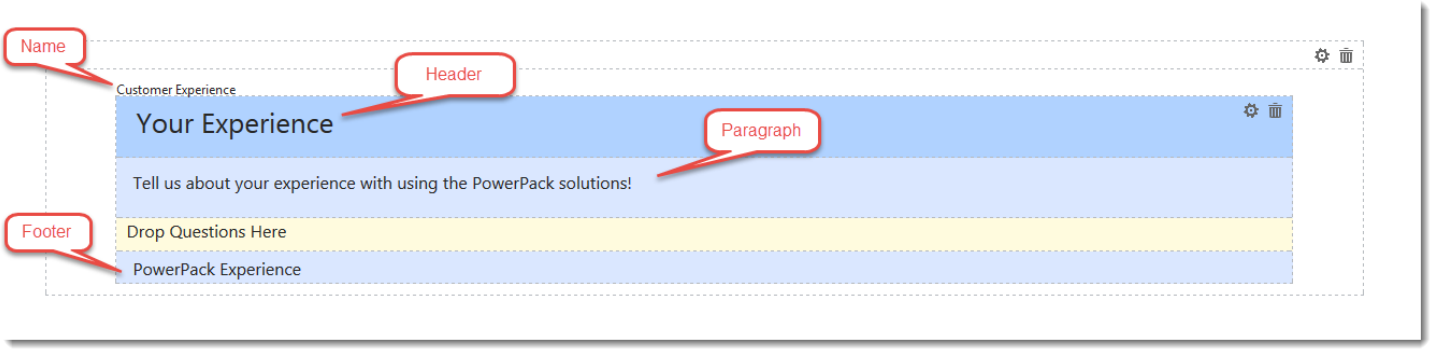
Adding Sections to a Page

Once you have created your pages, you can add sections to each page. To add a section simply select Section/Group from the right side pane and drag the section onto the page and drop it.



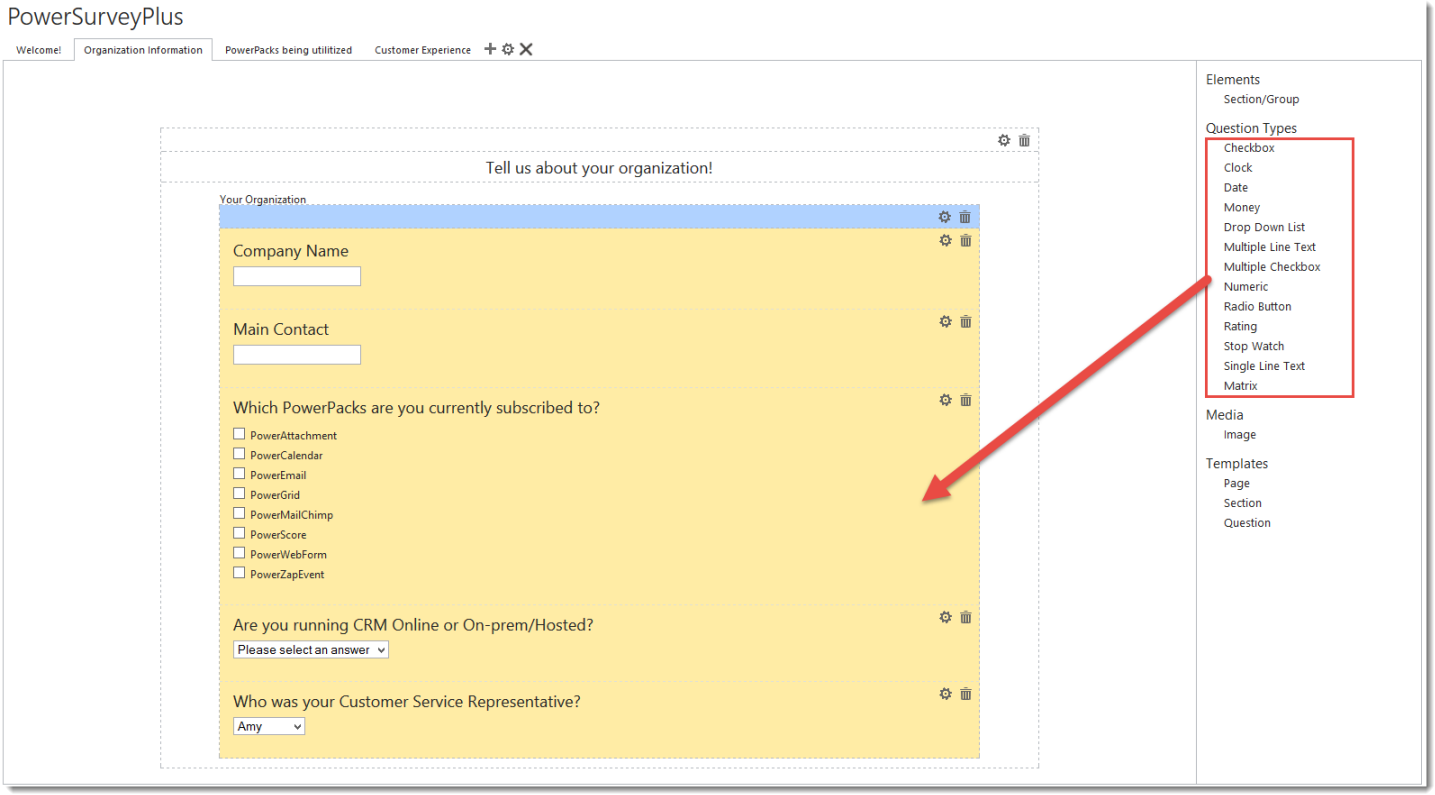
When you drop the section on the page you will get a pop-up that you will have to define before the section will be added to the page. This is the same setup presented with the Page, only you now have the option to for making the section **Repeatable**.



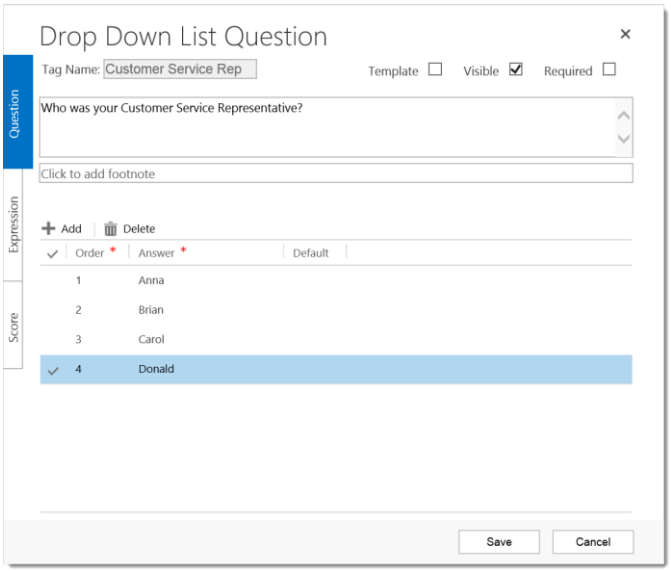


Adding Questions to a Section

To add a question to a section you will have to select the question type in the side navigation and drag the it to the section where you would like it to be displayed.



Upon dropping the question type in the section a pop-up will appear for you to create the actual question. In this pop-up you will define the question being asked and depending on the type the choices that the respondent can answer. In the example below we are asking a drop down question. When the client is asked, "Who was your Customer Service Representative?" they will be able to select one response from the four options listed (Anna, Brian, Carol, or Donald).



Templates

Any Page, Section, or Question that you create can be marked as a template. After you mark it as a template it is available for use on any Survey in your solution.

Please Note: *Templates will not show up in the templates section until you re-load the designer page.*

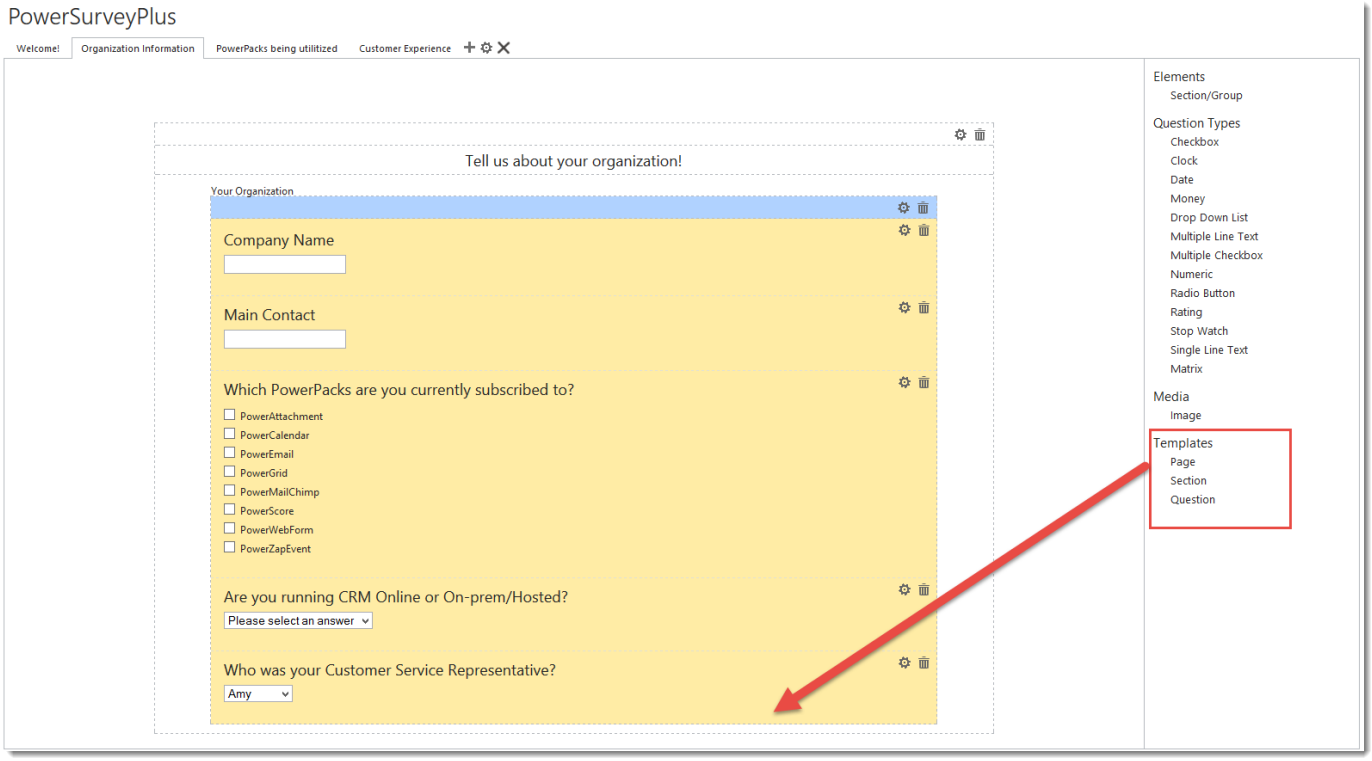
If you choose to use a Page Template please note that all sections and questions on the orignial page that was marked as a template, will show-up in the new page. This is true even if the sections and questions within the "Template Page," are not marked as templates themselves. If the sections and questions within a page are marked as templates it means that they are also available to be used individually in other areas of the survey.

When a template is used, it is a copy of the original element (page, section, or question) as it is at the time the template is selected to be used, not when the user checks the template field. Changes made to either the orginal element or the copied element, will not be reflected in the other related element.

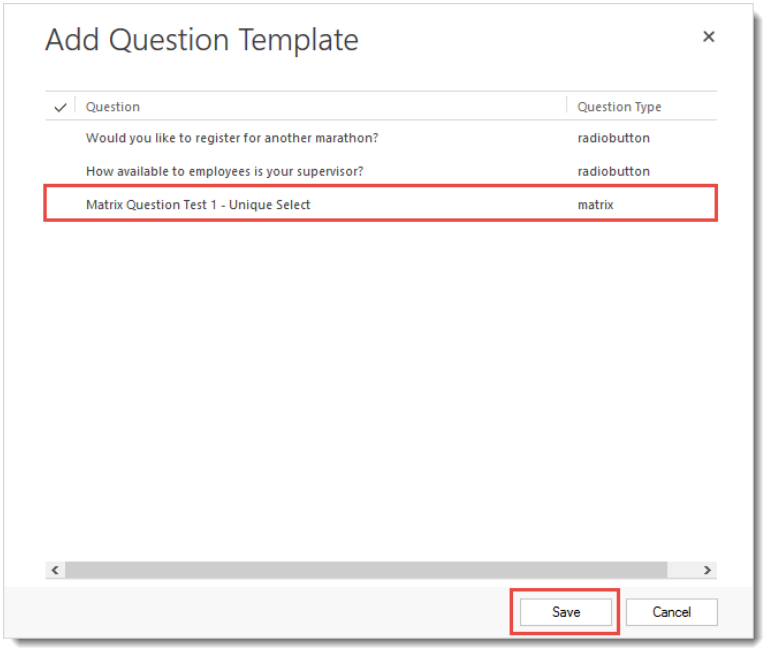
Pages , sections, and questions made from Templates **DO NOT** contain any of the expressions or Tag Names that the orginal element had setup. It is not possible to ensure that the tags referenced by those expressions are present in the survey that the template was used in or that any tag values associated with the template questions will be unique.

Adding a Template to a Survey

To add a template to your survey, select an element (page, section, or question) from the Templates area and drag it onto your survey.



Once you drop the element a pop-up will appear (related to the element you initially selected) asking you to select with template you would like to use. Simply select the template you would like to use and click Save. This will prompt the solution to add the template to your survey.



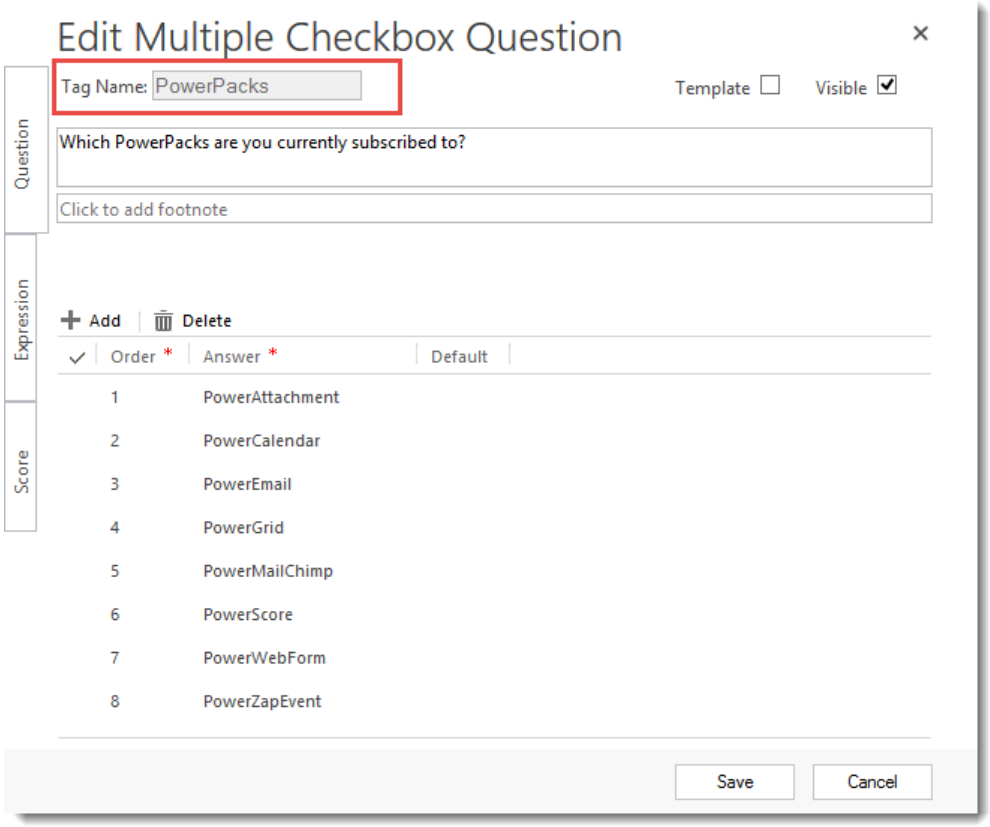
Expressions

Expressions are key to the Show/hide functionality in PowerSurveyPlus. A page, section or question may have expressions associated to it. An expression references a previous question on the survey by the "Question TagName." It can only reference tags that appear before it on the survey.

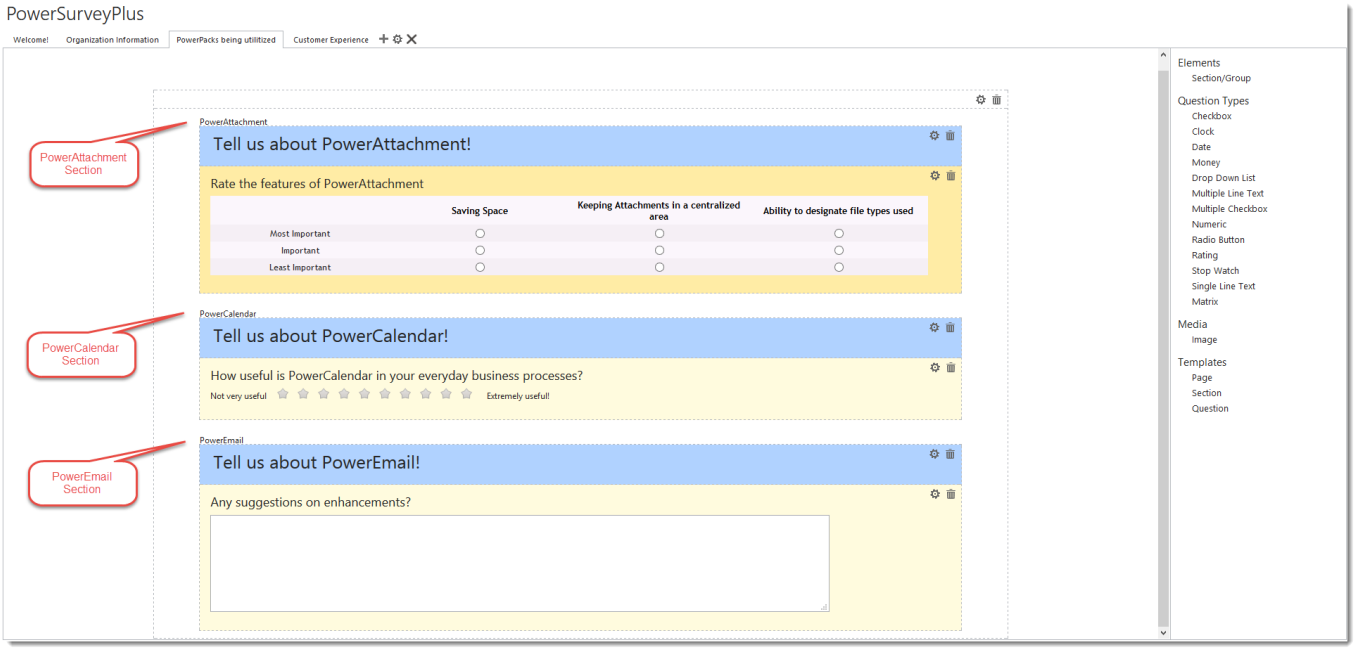
An example of using expressions to make other sections on a survey visible or hidden, based on an answer could be:

The survey question is "Which PowerPacks are you currently subscribed to?" This is a multiple checkbox question and depending on which PowerPack options are selected, we have setup expression to make corresponding sections available to the respondent.

Here is the original question, which we have given the **tag name** "PowerPacks."

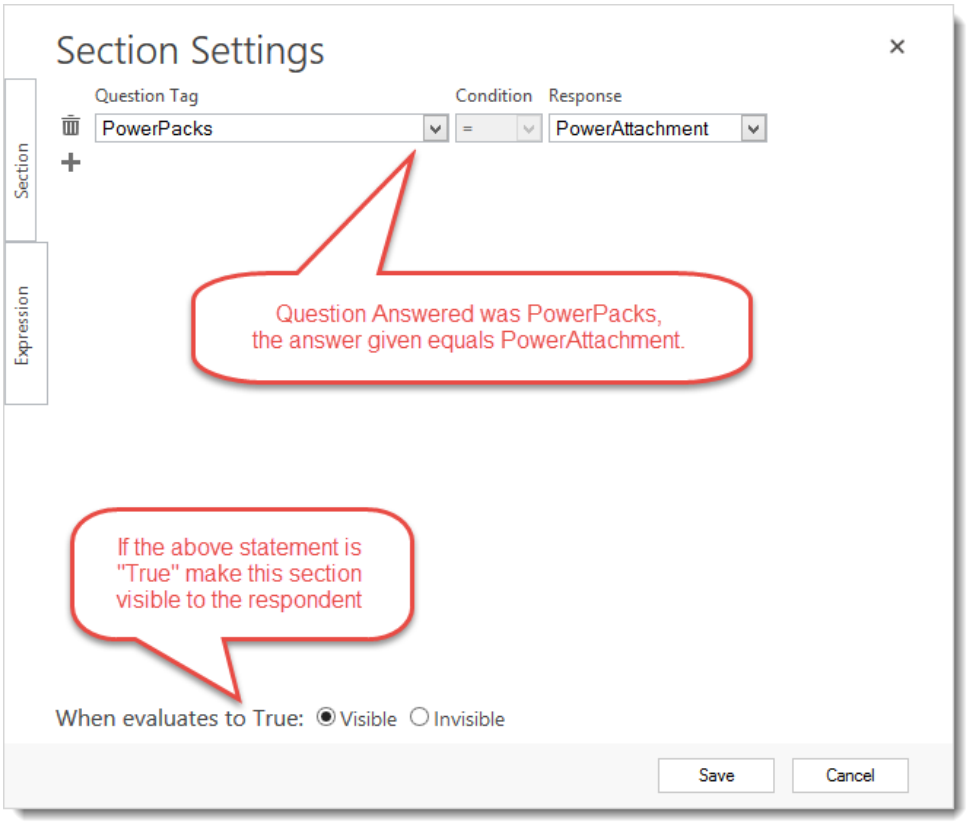


On a new page of my survey I have created sections for each of the PowerPacks listed in my question, "Which PowerPacks are you currently subscribed to?"



In the setup of each of these sections under the Expression Tab, I have added a question tag. In the screen shot below we are looking at the Section Settings for PowerAttachment. In the expression I am saying if the

Question Tag “PowerPacks” = “PowerAttachment” (so the respondent has checked the PowerAttachment checkbox) make this section visible.



Please Note: *It is important to use smart **tag names** so you know which questions they refer to.*

If the expression evaluates as false the item will remain in its default state:

Item Default State	True Value in Exp	Expression Result	End State
Visible	Visible	True	Visible
Visible	Visible	False	Visible
Visible	Hidden	True	Hidden
Visible	Hidden	False	Visible
Hidden	Visible	True	Visible
Hidden	Visible	False	HIdden
Hidden	Hidden	True	Hidden
Hidden	Hidden	False	HIdden

If a page is hidden all of its sections and their questions will be hidden; regardless of how any expressions on those items might evaluate to visible, that same is true for sections. Any expressions that refers to tags on hidden questions are not evaluated and have no effect – the question will remain in whatever it’s default state was – hidden or visible.

Tags cannot be placed on Matrix or Multiline text questions, so expressions cannot reference those types of questions to show or hide other items on the survey.

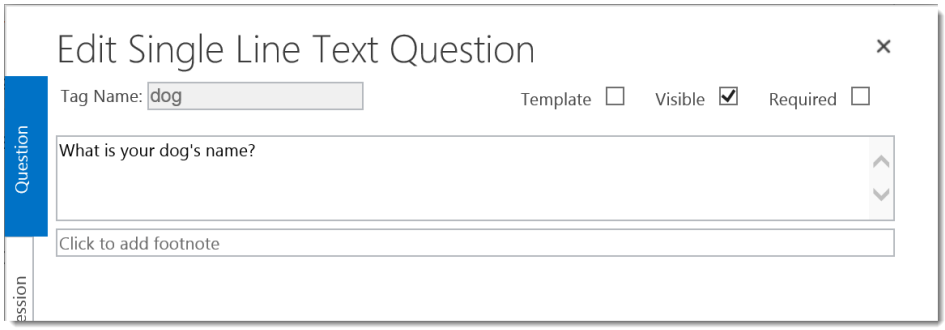
If you have multiple Expressions on an item they must all implement either AND or OR logic, Either all are true to evaluate the Expression as true or any are true to evaluate as true. You **cannot** mix **"and/or"** expressions.

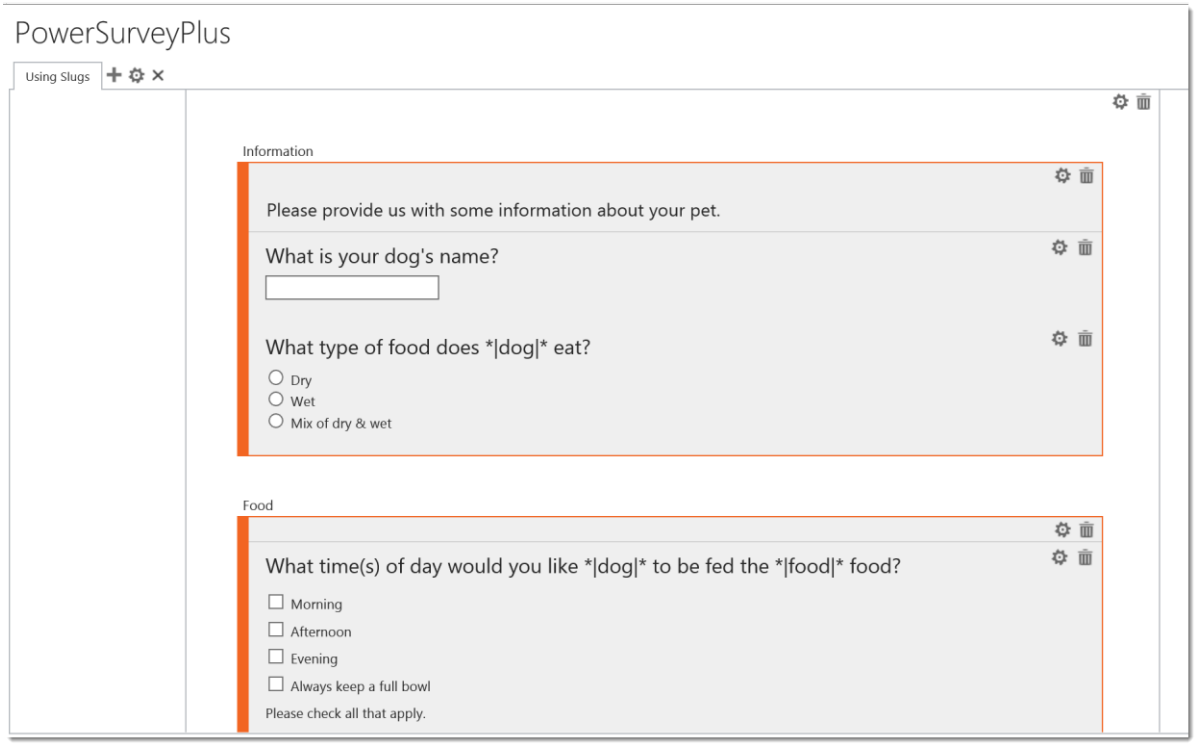
Slugs

Slugs are tags that can be added to questions or sections that display information from CRM or answers to previous questions. Slug tags need to encased by *| |* in order to work properly.

Populating slugs with answers

Slugs can be populated with answers from previous questions, by placing the question's Tag Name between the *| |*.

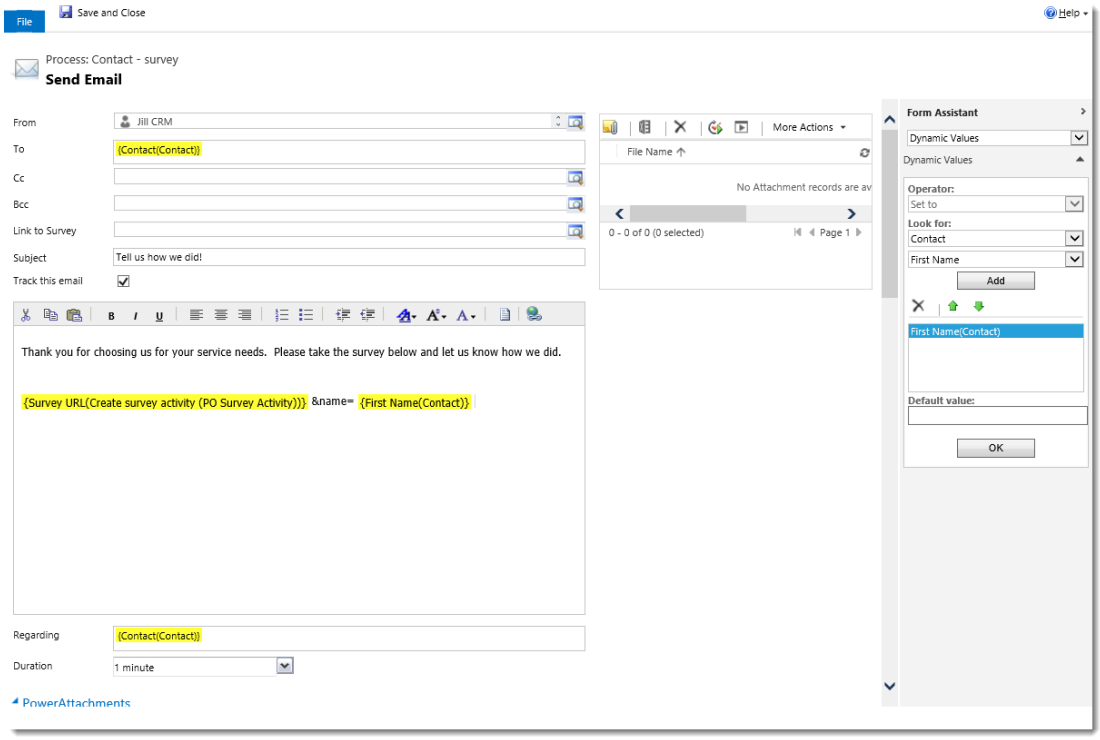


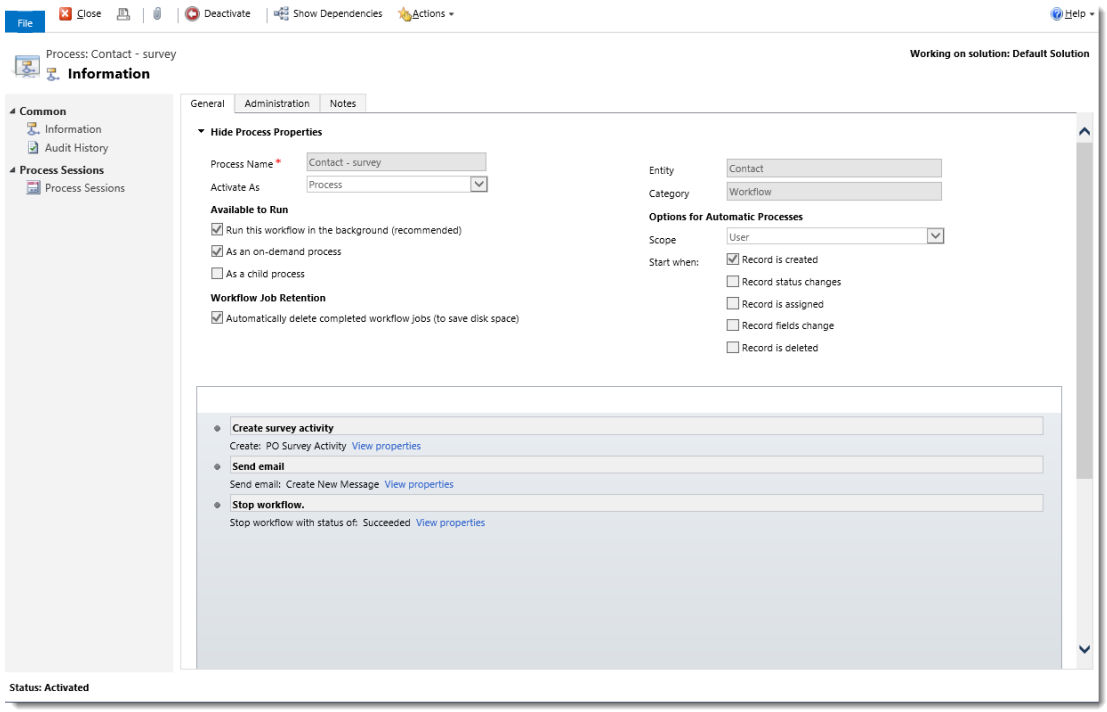


Populating slugs with CRM data

You can use values from CRM to populate slugs in the survey by adding &{slugname}={value}. For example, if the survey has a slug for first name (*|firstname|*) then adding *&firstname=Anna* to then end of the survey URL

would populate the slugs with the name Anna. The example below shows how a user would append the values using a workflow.



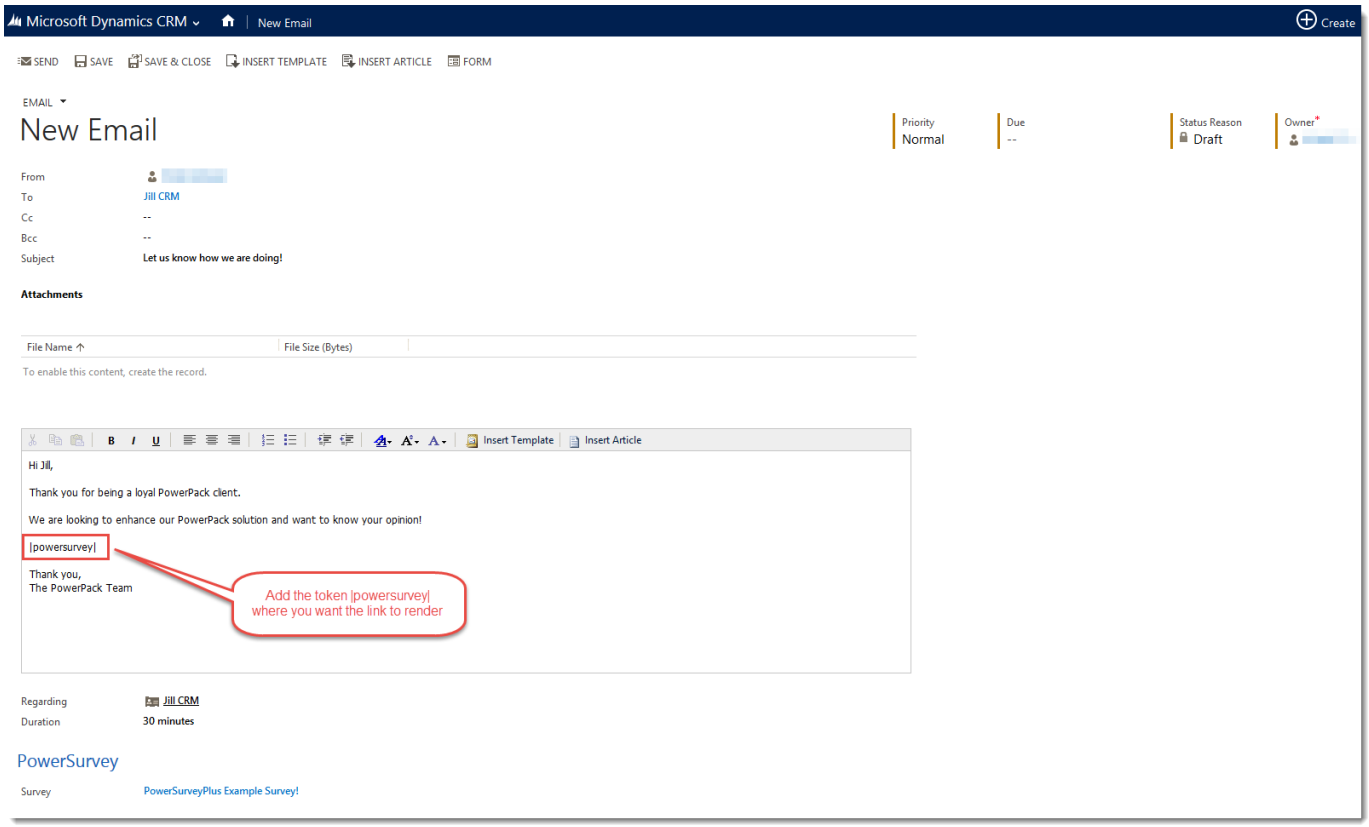


Sending a Survey through PowerSurveyPlus

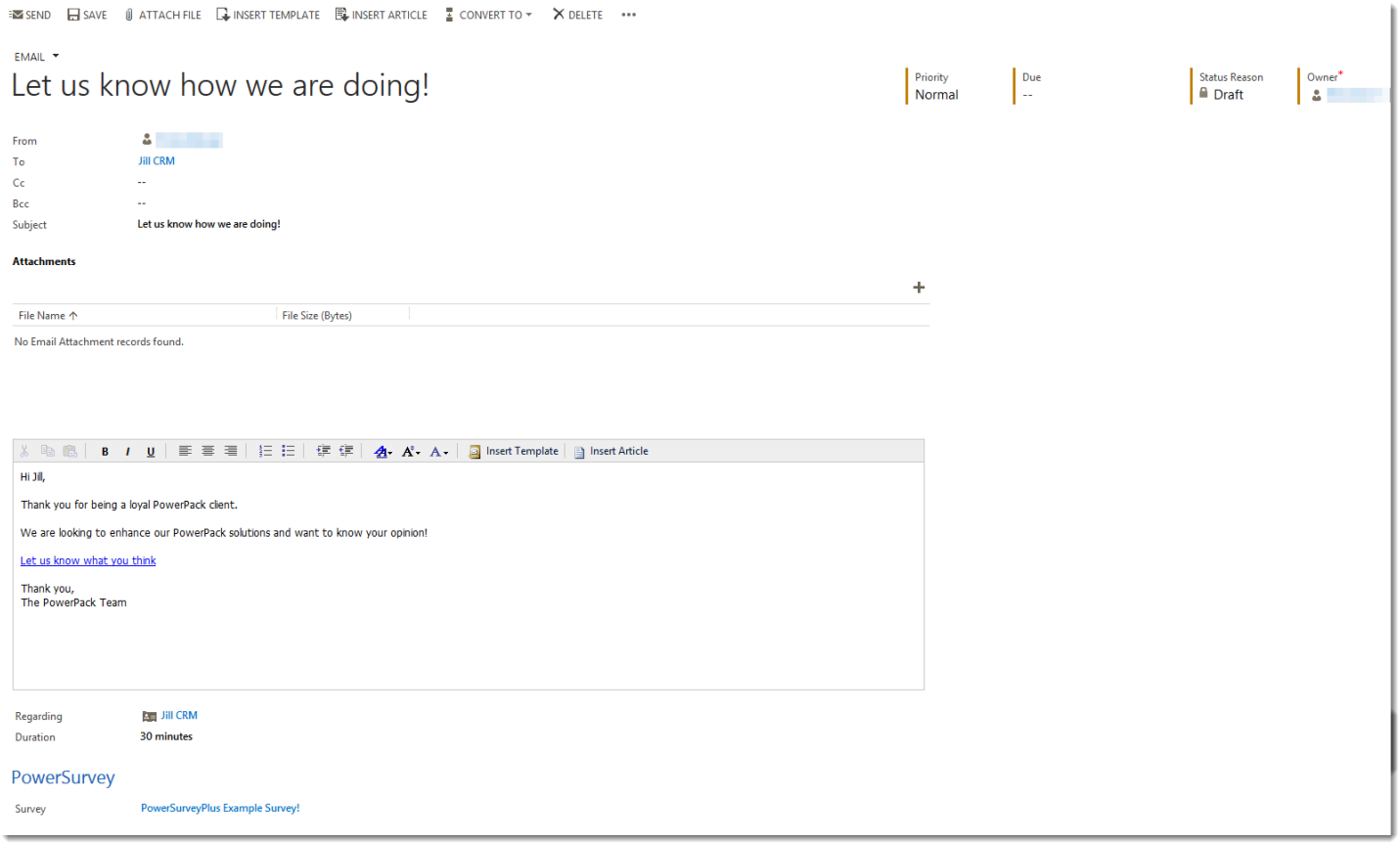
PowerObjects has made PowerSurveyPlus as robust as possible to accommodate all possible scenarios for sending surveys. Typically surveys will either be sent to one individual at a time (manually or automated), sent to a group, or filled out over the phone. The options are all listed in this section.

Individual – Via Email Activity

Navigate to the record that the email/survey will be sent from. Once on the record create a new email activity. You will notice that the email activity form has not been drastically changed, but we have added a PowerSurvey section at the bottom of the form. Simply fill out the email activity as normal and denote the Survey you would like to send. Within the body of the email you will want to enter the token **|powersurvey|** where you would like the link to appear. If you do not add the **|powersurvey|** token to the email the link will automatically render at the bottom of the email.

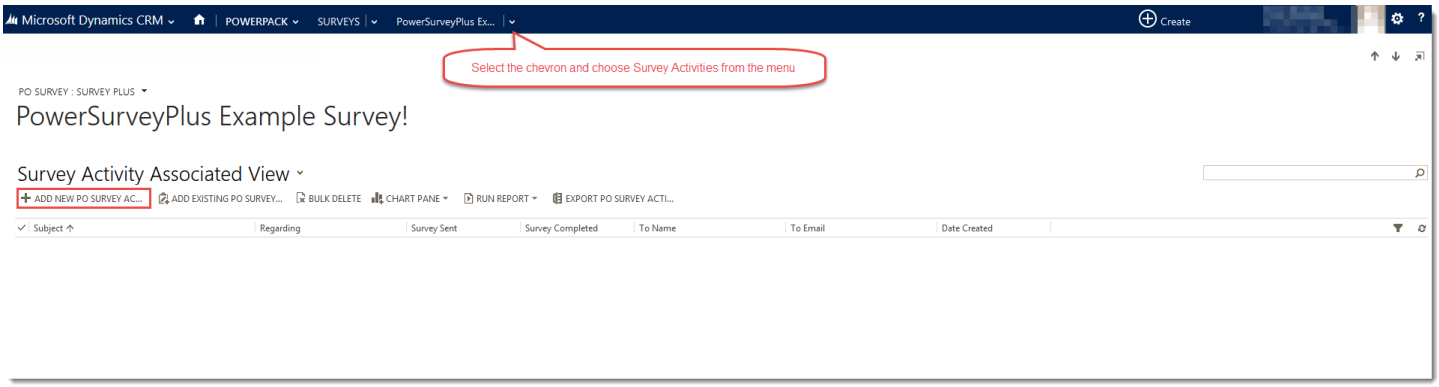


Once you send the email activity you will notice that the survey token will convert to a link.

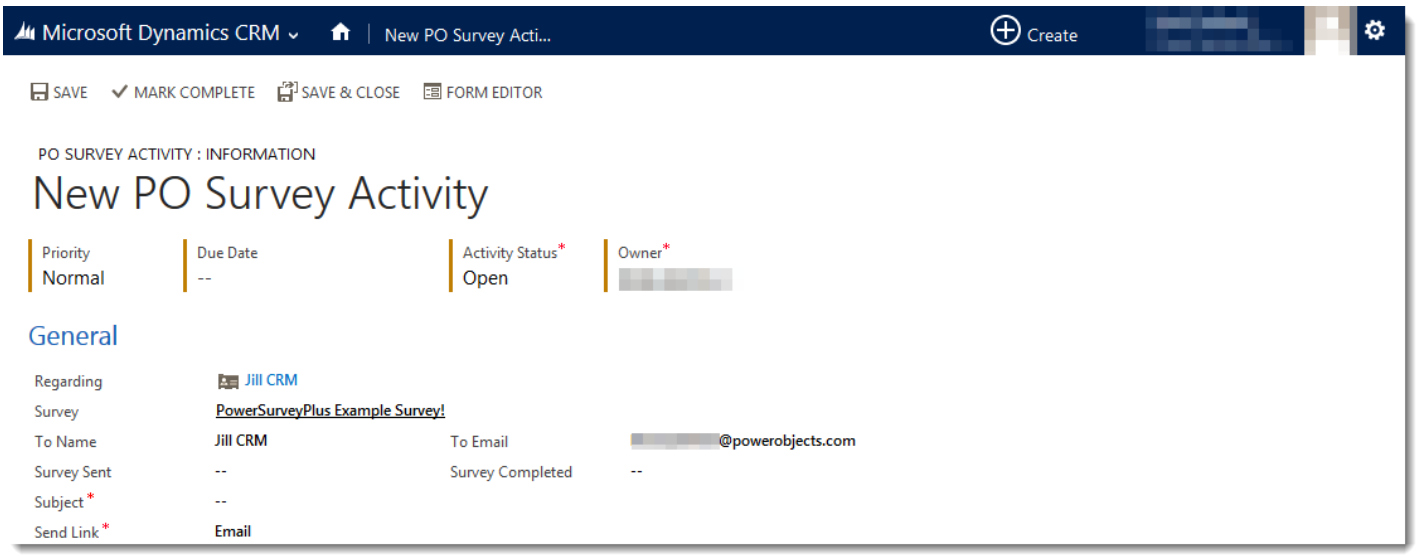


Individual –Via Survey Activity

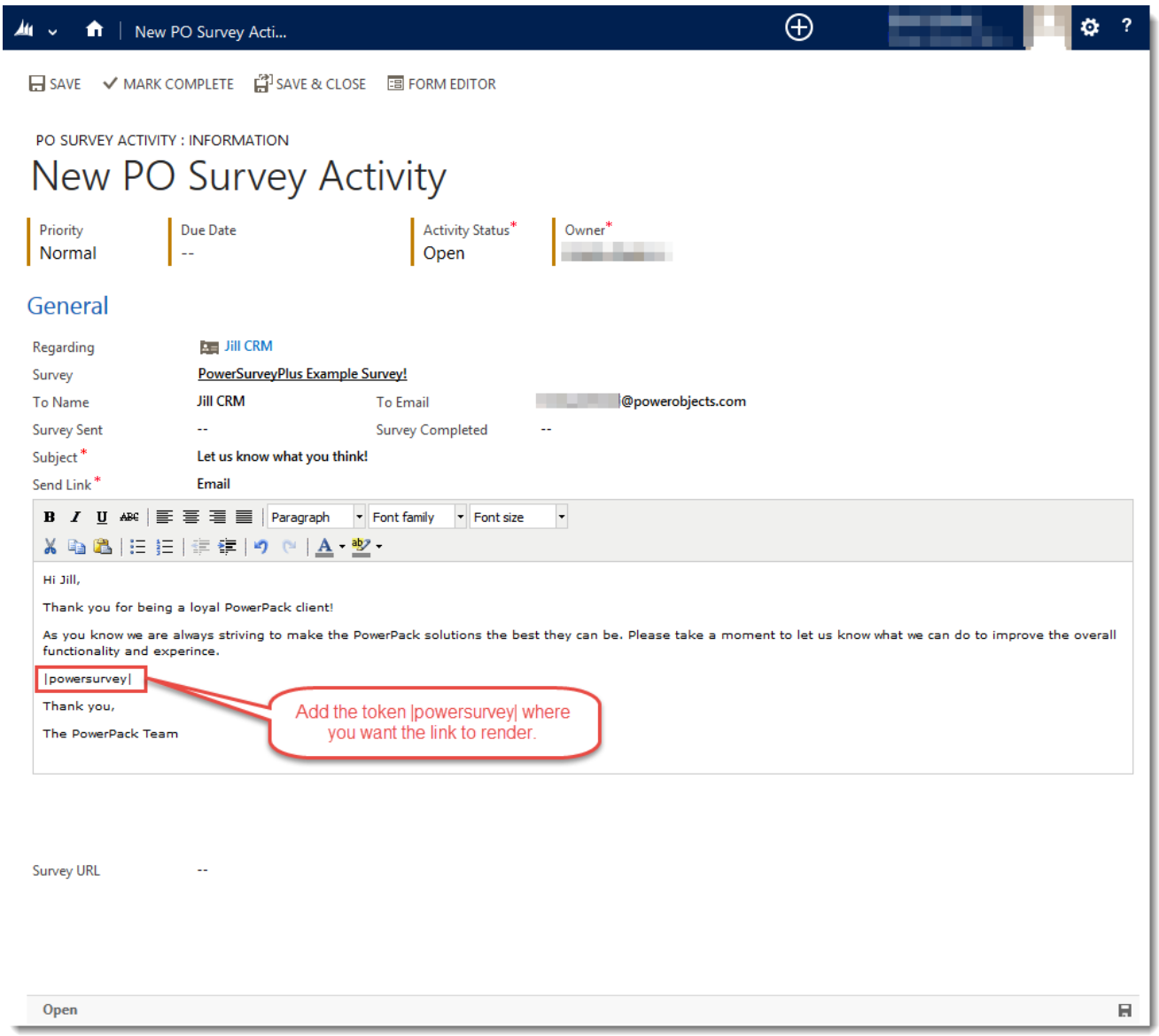
Navigate to **Survey Activities** by clicking on the chevron next to the survey name in the top menu. Select **Add New PO Survey Activity**.



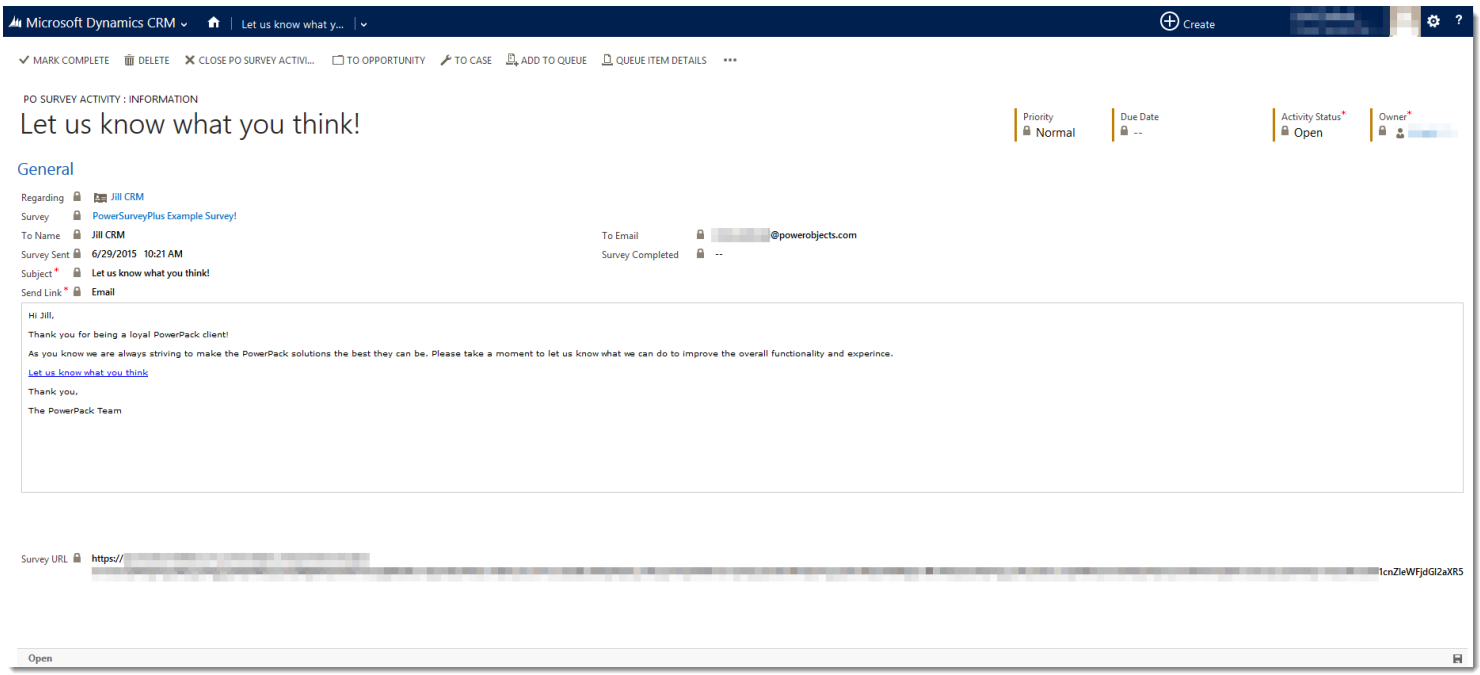
This will open a new window where you can define the details of the survey activity. Creating and sending a Survey Activity is the equivalent of sending an email except that when filling out a Survey Activity you will have to define the regarding field. Once you have filled in the regarding field and set the Send Link field to 'Email' the To Name and To Email field will appear populated.



From there you will simply have to build out the email, giving it a subject and content. If you want the survey link to render in a specific spot within the body of the email, you will have to enter the token **|powersurvey|**. Once the email is sent this token will be converted to a hyperlink. If you do not define a token within the body of the email, the link to the survey will render at the end of your email.

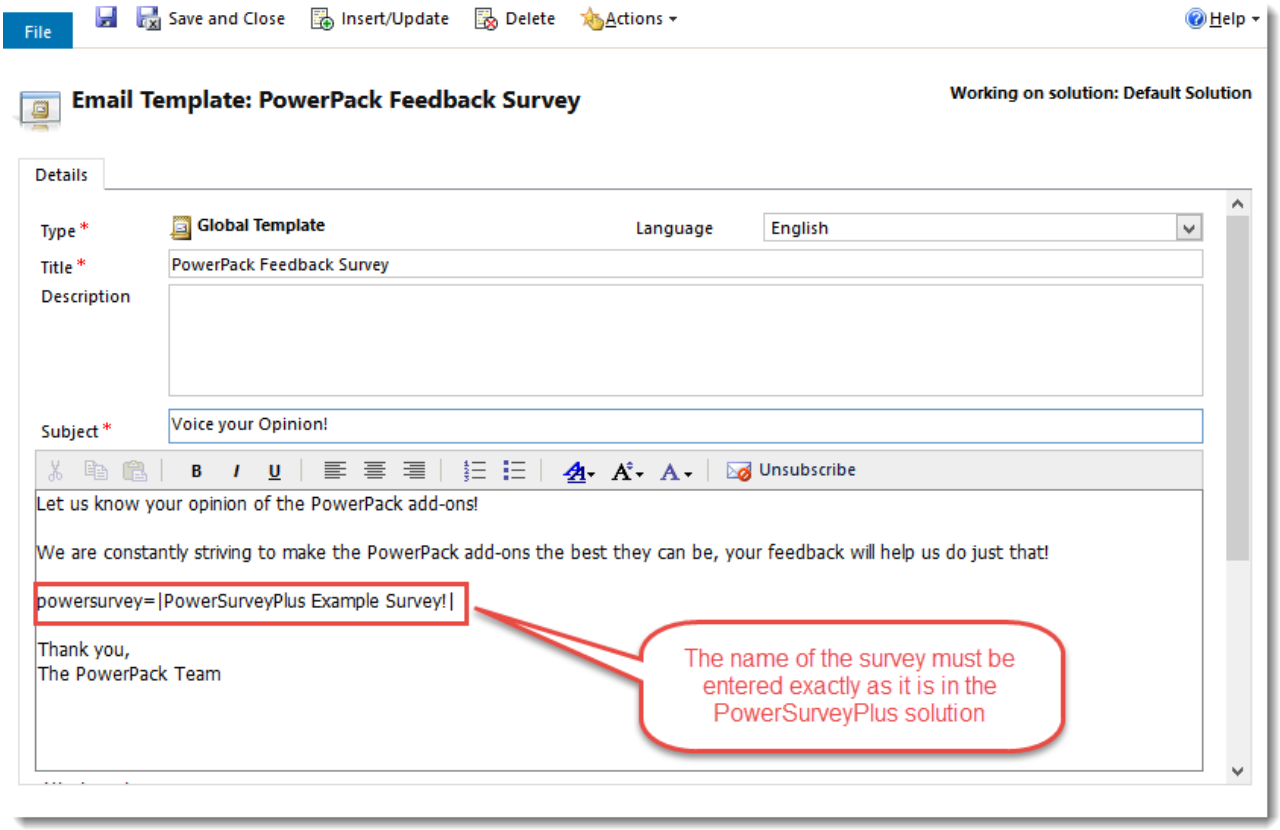


Once you save the Survey Activity, the email will be sent to the recipient defined. Additionally, the Survey Activity itself will automatically populate the Survey Sent and Survey URL fields and the **|powersurvey|** token will show as converted.



Group – via Email Template

In order to send a survey to a number of people at once, you will have to create an email template. Navigate to the templates area of CRM and create a new Email Template. Within the email template content you will have to add a PowerSurvey token so the solution will pull the correct survey.



The token can be in any of the following formats

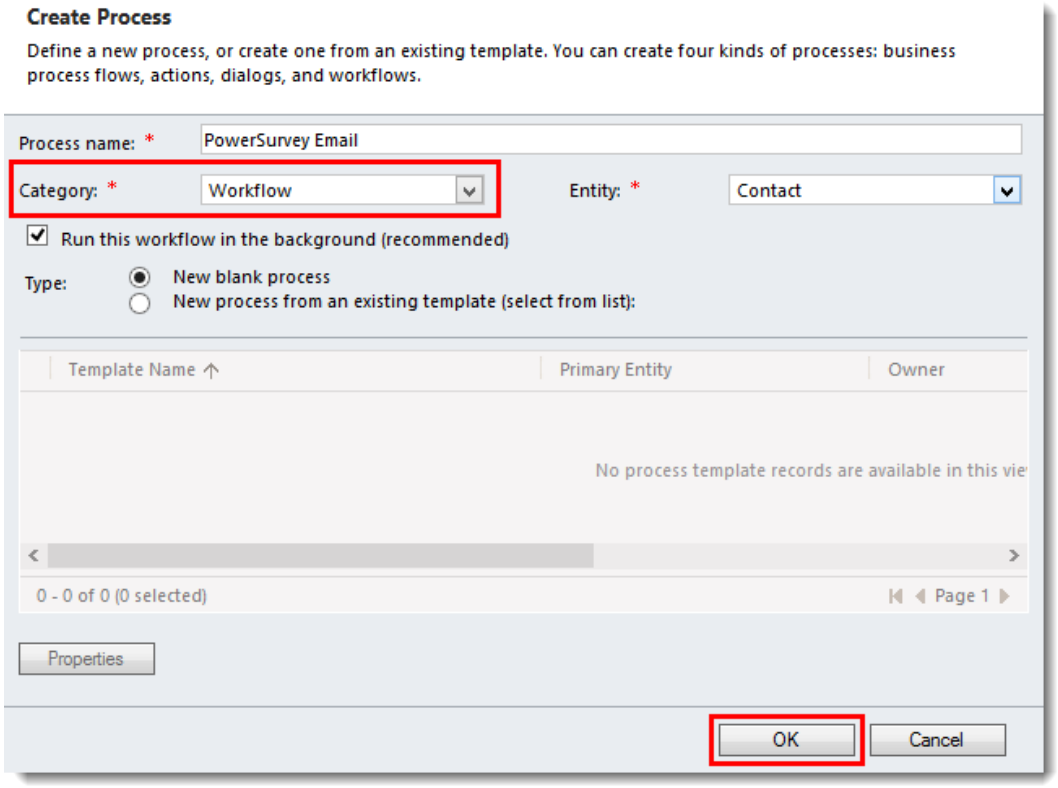
powersurvey=[Exact Name of Survey]
powersurvey=(Exact Name of Survey)
powersurvey="Exact Name of Survey"
powersurvey=|Exact Name of Survey|

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 utilize it when sending through quick campaigns, individual emails, workflows, etc.

Group – Via Workflow

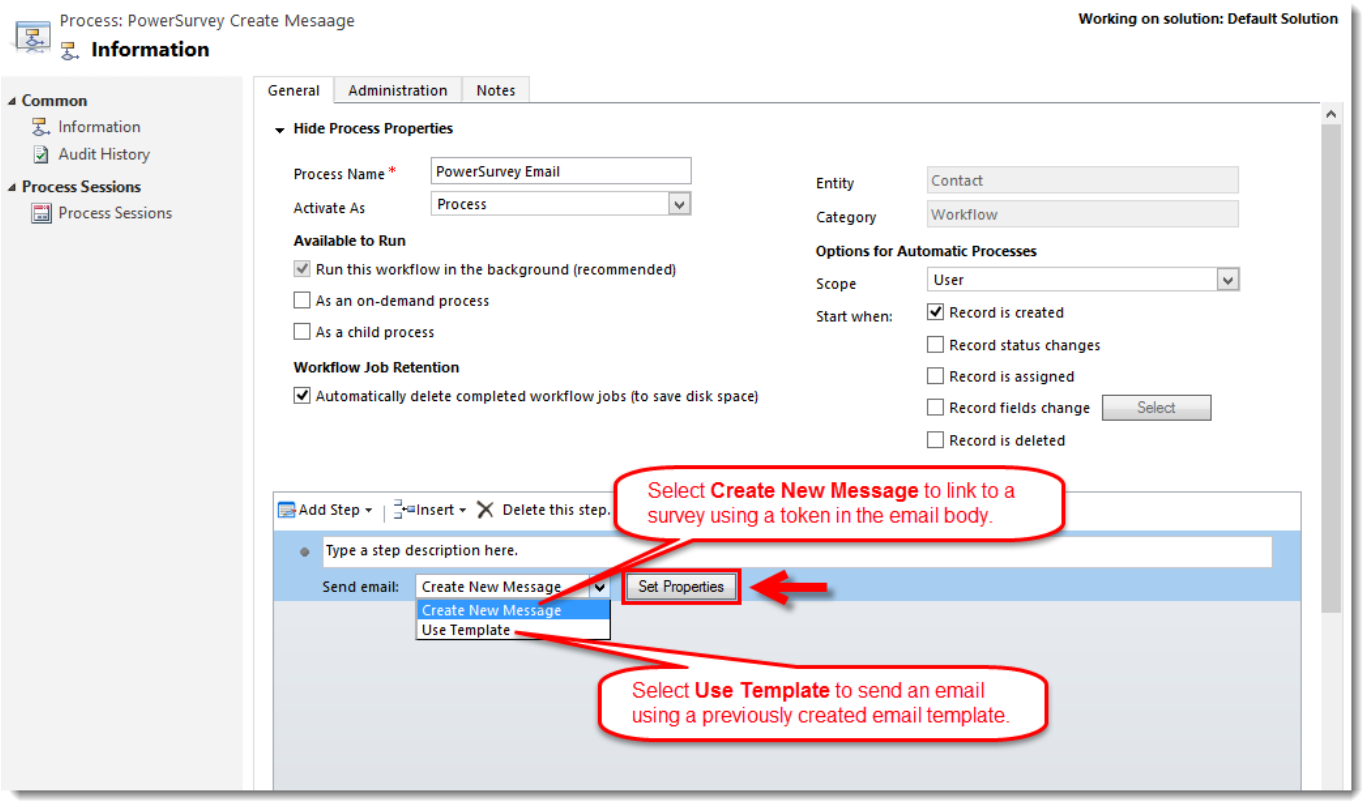
Navigate in CRM to Settings > Processes > New. Type the name of your workflow into the Process name field. Choose workflow from the Category dropdown. Select the desired Target Entity from the Entity dropdown and click OK.



Note: *This example only shows the e-mail step and is **not** a complete workflow. The e-mail will be sent from a previously created E-mail template or from a brand new e-mail message.*

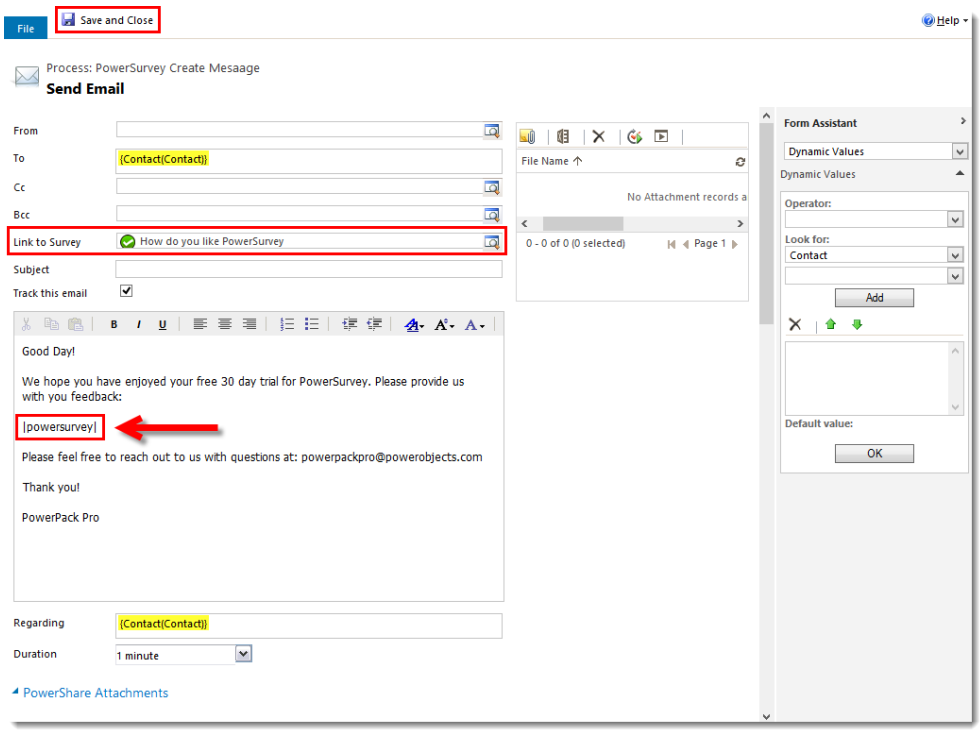
Sending E-mail Via Template/New Message

Choose Use Template or Create New Message from the Send Email dropdown and click Set Properties.



If selecting Use Template simply choose the template you want to use and click Save and Close.

If Create New Message was selected 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 and Close.



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.

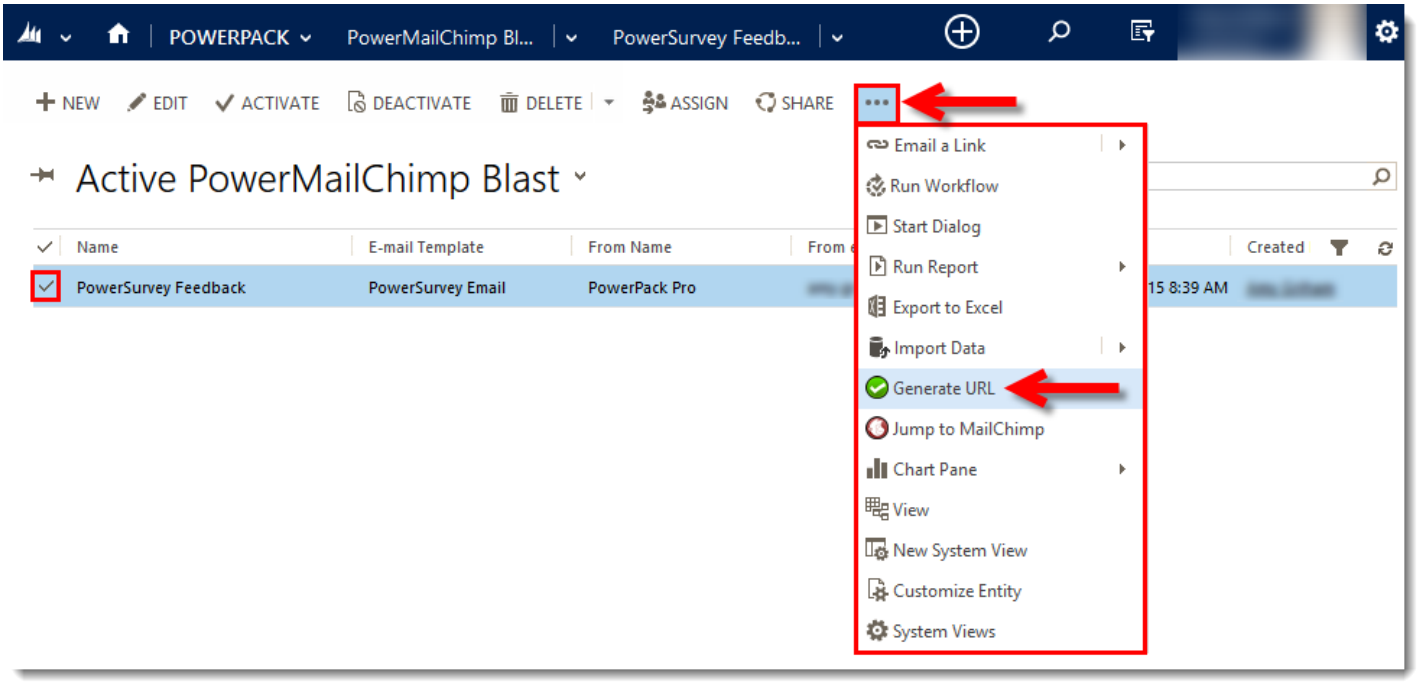
Group – Via PowerMailChimp

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.

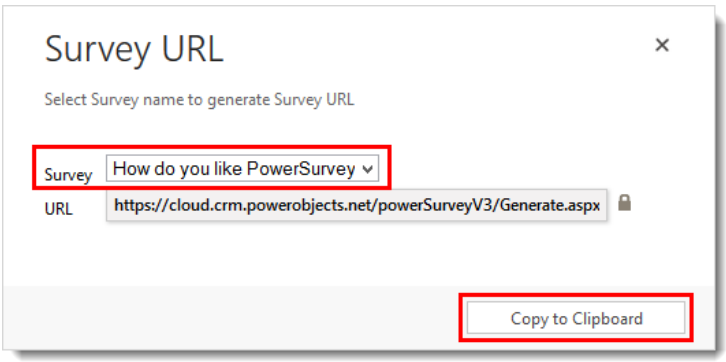
To begin this process, start by acquiring the Survey URL to insert into the MailChimp Template.

Navigate to PowerPack > PowerMailChimp Blasts.

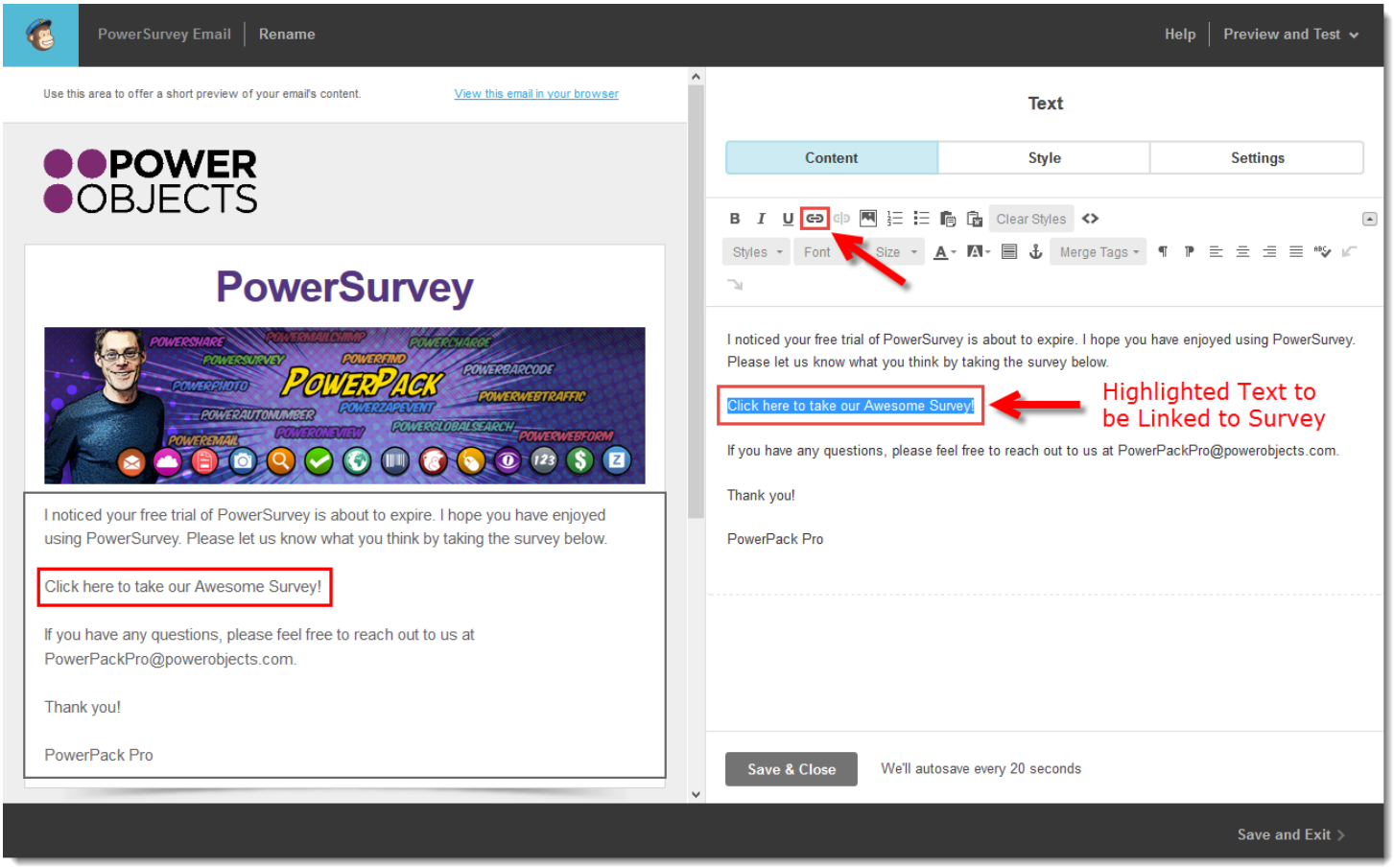
Select the Blast where the Survey Link is needed. Click the Ellipse. From the drop down menu, select Generate URL.



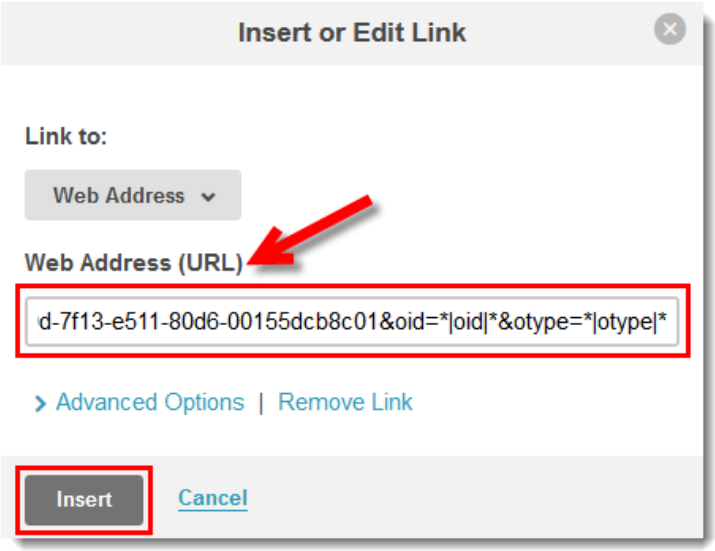
Select the desired Survey. Click Copy to Clipboard.



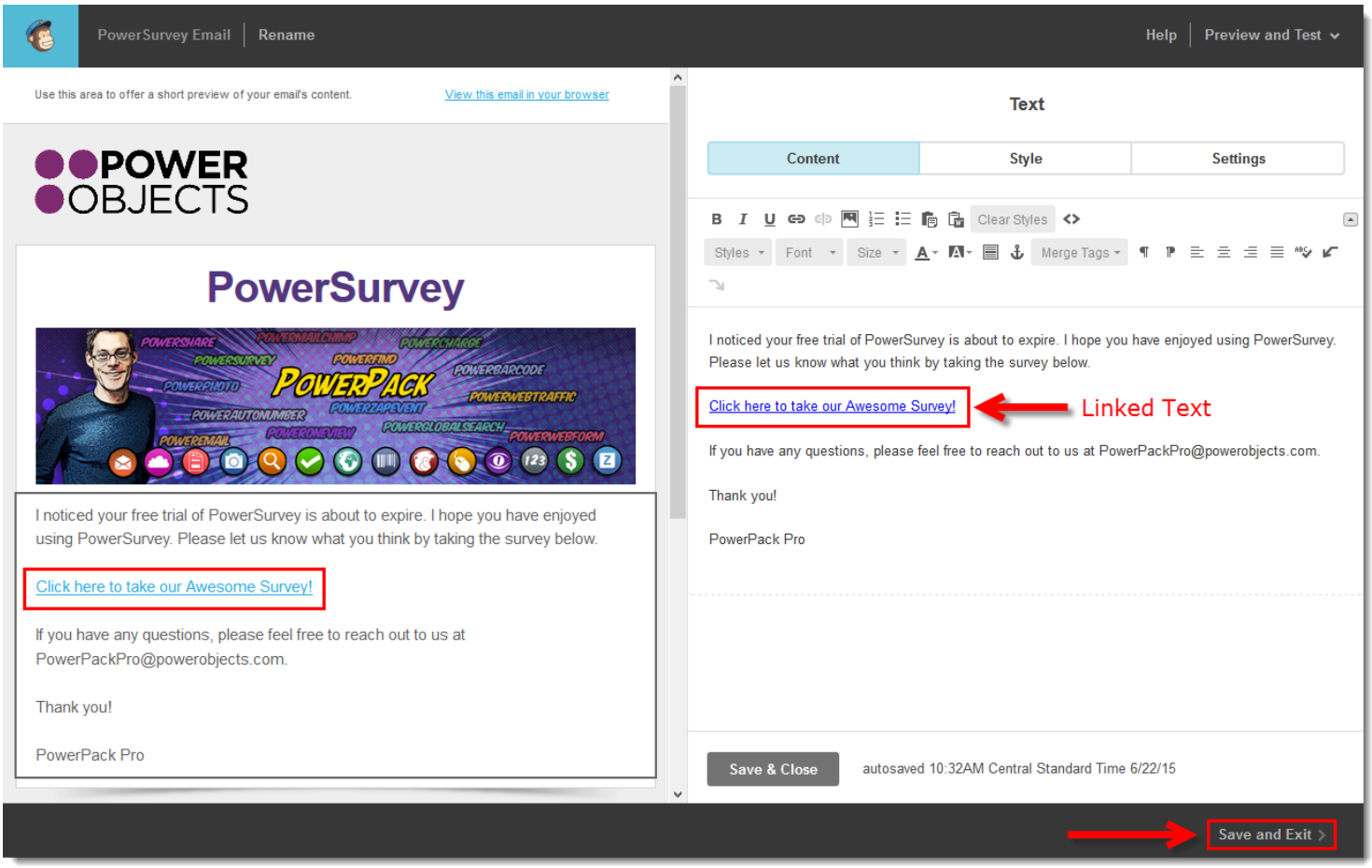
Now, Jump to the MailChimp site (reference the PowerMailChimp User Guide for help creating Template in MailChimp). Open the template to insert the survey link. Click in the area of the template the link will be inserted. Type the text you want survey recipients to click to be routed to the survey; for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



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



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

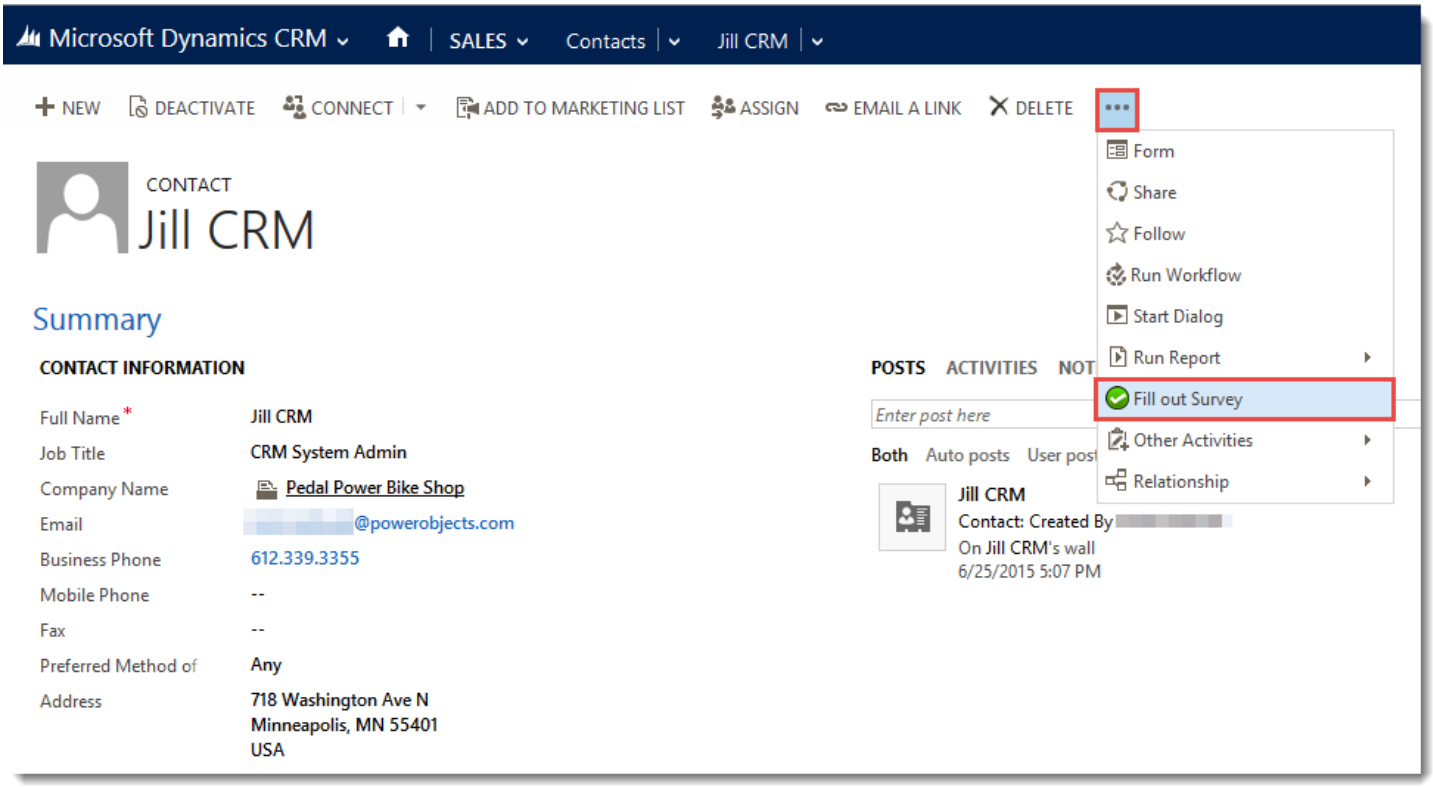


Once you have added the survey link to the template you can send out your PowerMailChimp Blast as normal. For a refresher on how to send a PowerMailChimp Blast, please check out the PowerMailChimp User Guide.

"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. It is great for people who are conducting calls with contacts and leads.

Navigate to the record you would like to work with, select the ellipse from the ribbon and select **Fill Out Survey**.



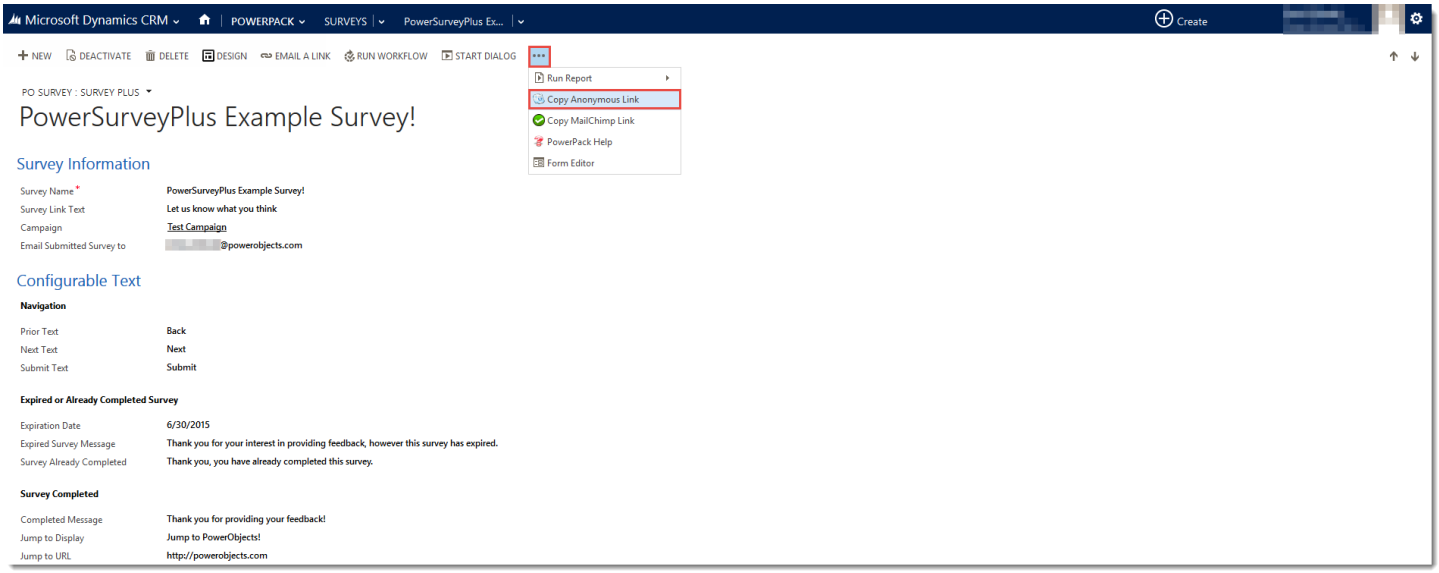
This will open a look-up where you can select which Survey you would like to fill out for the record. Once you select the survey and select add, the solution will automatically pull up the survey for you to fill out.

Anonymous Surveys with PowerSurveyPlus

With PowerSurveyPlus, users have the ability to send out anonymous surveys whether it is through an email or being posted on a website.

To grab the anonymous link navigate to PowerPack > Surveys and open the survey you want to use.

Click on the Ellipse and select Copy Anonymous Link from the drop down.



The URL of the anonymous survey has now been copied to the Clipboard. Navigate to the location you would like the anonymous survey and paste. 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. These anonymous survey activities can be viewed under the **Survey Activities** of the survey itself.

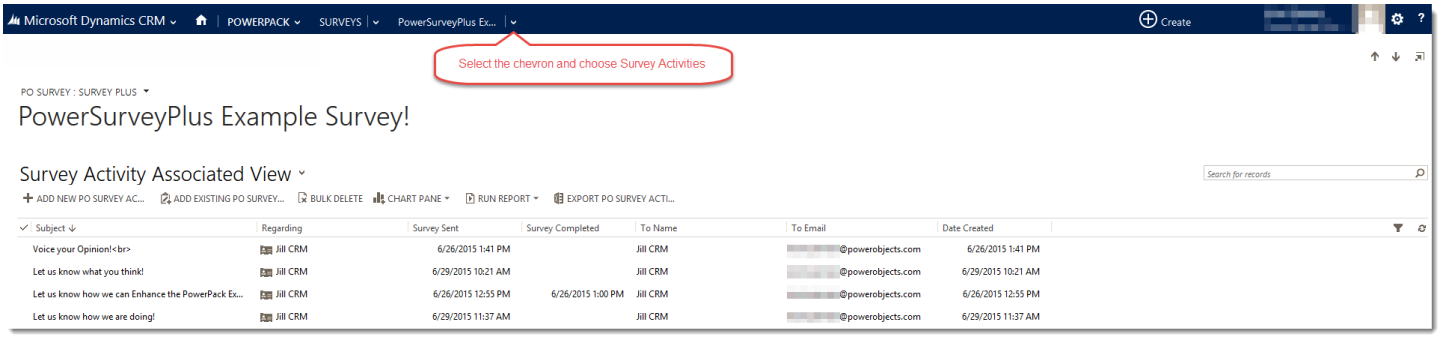
Viewing Survey Responses

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

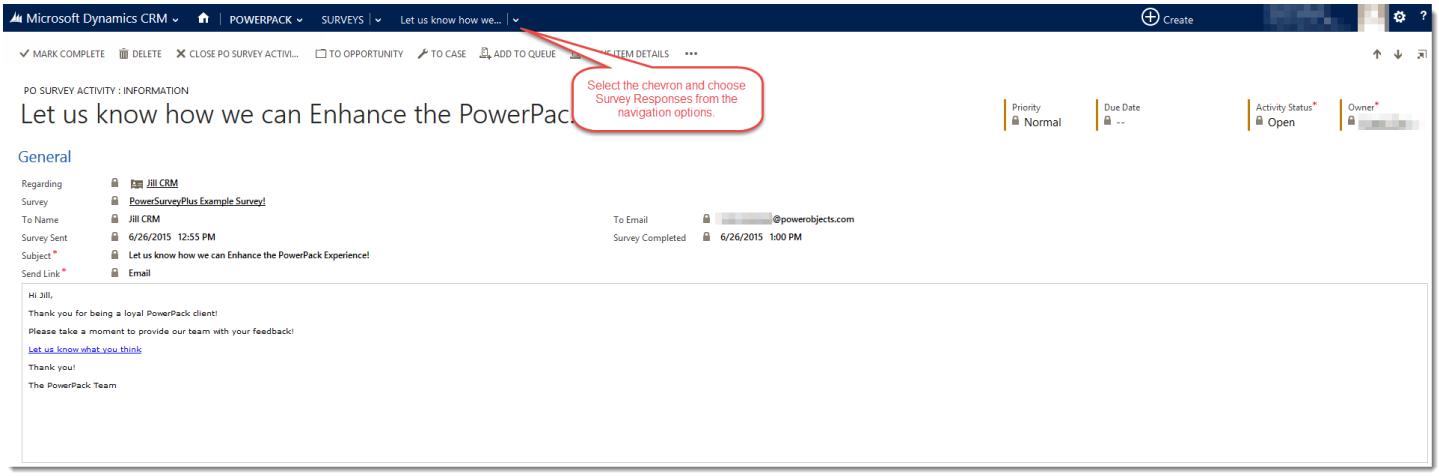
1. Via SurveyActivities

Navigate to PowerPack > Surveys > Select the Survey you want to work with and from the ribbon choose Survey Activities.

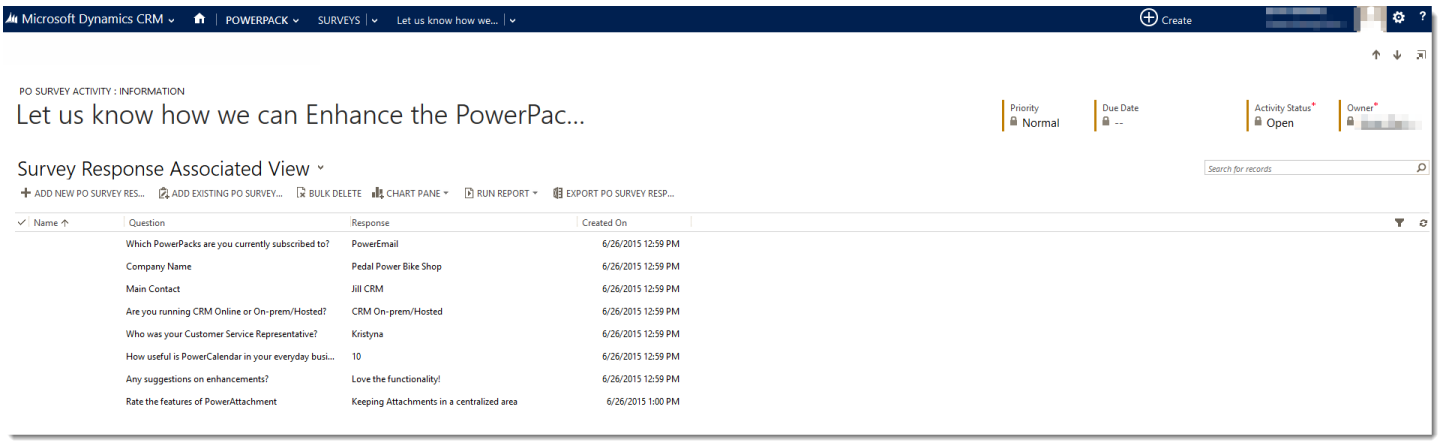
This view will list out all of the survey activities that have been recorded that are associated to the Survey record you are on.



If you double click on a Survey Activity, the main form will show you the details of the Activity including the email the survey was sent in, Survey Sent information, and the Survey Completed information. To access the actual responses recorded users will have to navigate to the Survey Responses Section from the navigation.



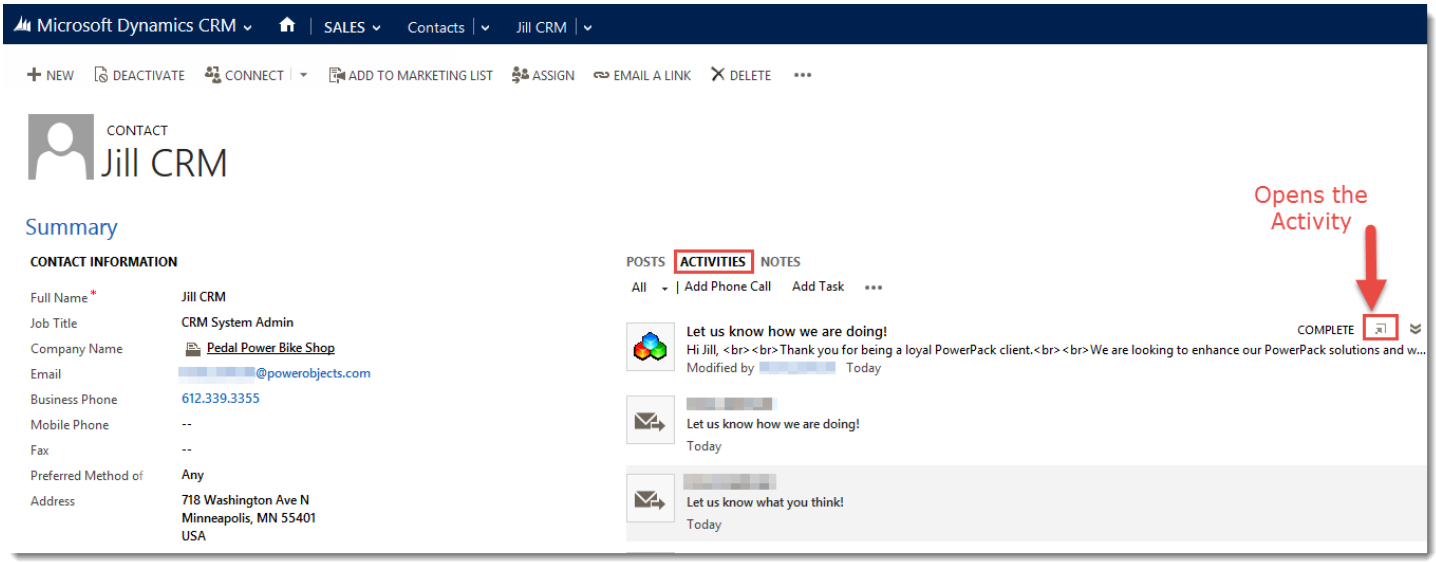
Under the Survey Responses area the view will show the questions asked, the response given, and the time and date the response was submitted.

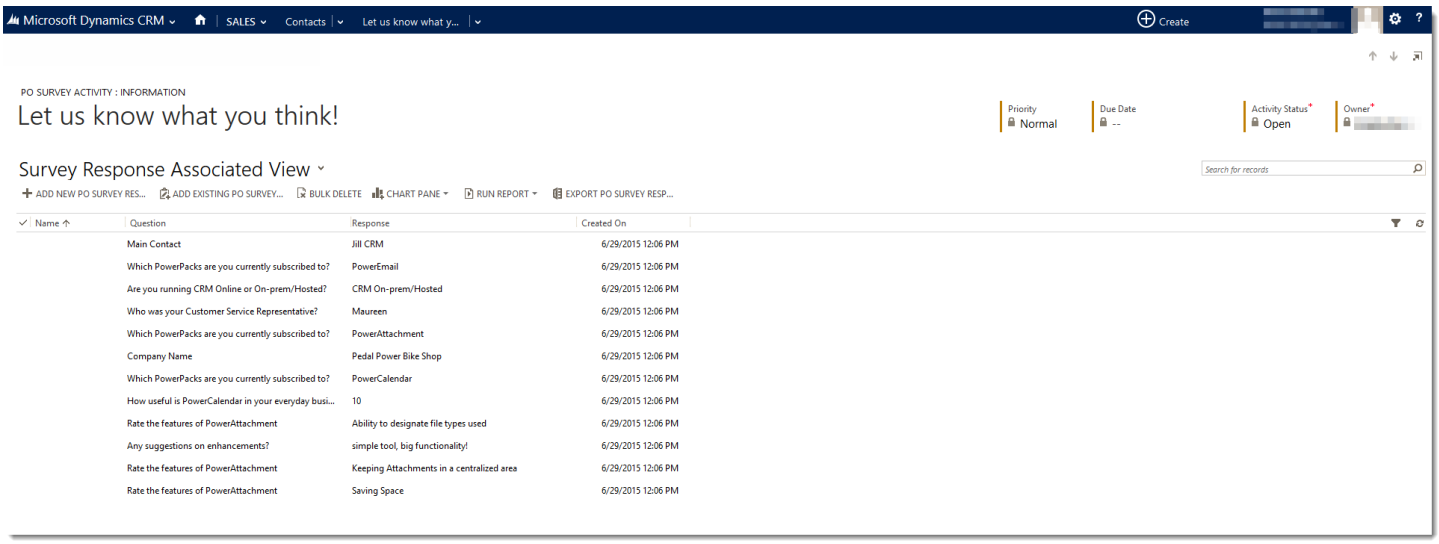


2. Via CRM Records

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.

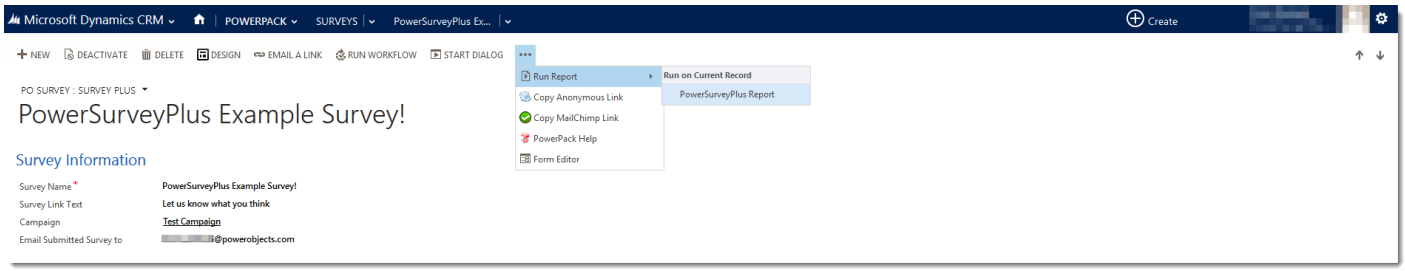
When the record is opened, activities can be viewed. Click the **Activities** tab to display all recent activities related to the record. Open the **Activity** and select Survey Responses from the navigation to view responses and details regarding the Survey.



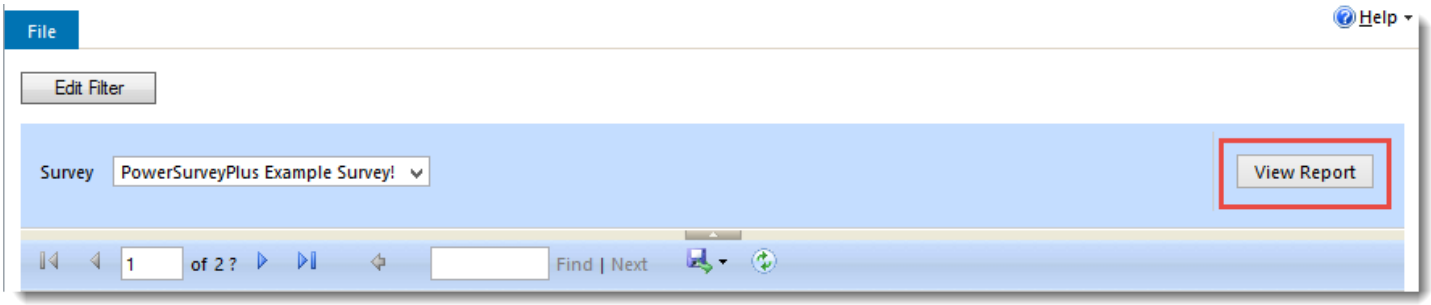


3. Reports

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 the **PowerSurveyPlus 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 question asked.



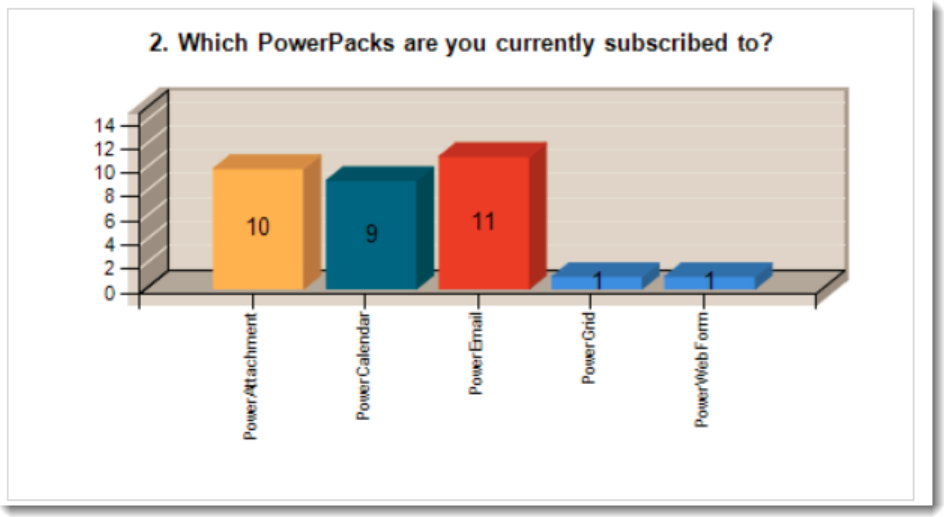
Note: *The report may take a little bit of time to load. If the report doesn't seem to be generating, try running the report again.*

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 examples below, the question types are Text Box, Multiple Checkbox, and Matrix.

Text Box:

1. What is your experience with CRM?	
Name	**Answer**
	Moderate
	New to CRM
	I have used CRM for 3 months, my comfort level is moderate.
Maria Campbell (sample)	Advanced, I use CRM on a daily basis.

Multiple Checkbox:



Matrix: