



Experts in Microsoft Dynamics

Site Assessment Survey
 Woodford Development Guide
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Prerequisites

Install RESCO Mobile CRM Woodford in PC using following link

- Use Internet Explorer to download Woodford because it need Silverlight installed in the computer

<https://resco.net/mobilecrm/woodfordhistory.html>

- Click on Version 10.0.3.0
- Download standalone installation and it will install desktop client of RESCO Woodford

Resco MobileCRM Woodford v10.0.3.0

Microsoft Dynamics CRM 2011, 2013 & 2015 Integration

Download for 2011

Download for 2013, 2015 & 2016

Standalone application

Install

To integrate the MobileCRM Woodford application to the Microsoft Dynamics CRM environment, please download the...

Please press the install button to install the MobileCRM Woodford application to your desktop computer.

Required minimal Mobile CRM version 10.0+

Please before installing the new version of the Woodford make a backup of your current mobile project with the installed version.

Woodford Version History

- Please verify the installed version of the Woodford solution in CRM is compatible with standalone application.
 - If Woodford standalone application is in version 10+ then Woodford solution in CRM should have the same 10+ version (not 9+ solution).

Name	Display Name	Version	Installed On ↓	Package Typ...	Publisher	Description
CRMRESTBuilder	CRM REST Builder	2.5.0.0	8/28/2017	Managed	Jason Lattimer	https://github.com/jlattimer/CRMRESTBuilder v2.5.0.0 for...
eBECSiteSurvey	eBECS Site Survey	2.2.0	8/28/2017	Unmanaged	eBECS Survey Solution	2.2.0 - Implement licensing 2.1.4 - minor bug fixes 2.1.3 -...
RibbonWorkbench2016	Ribbon Workbench 2016	3.0.25	7/7/2017	Managed	Develop 1 Ltd	3.0.25 LocLabels correctly displayed when base Icid is not...
Woodford	Resco MobileCRM Woodf...	10.1.0.0	6/5/2017	Managed	Resco spol. s r.o.	Customization tool for Resco MobileCRM.
SurveyUnlicensedCompon...	Survey Unlicensed Compo...	1.0	5/30/2017	Unmanaged	eBECS Survey Solution	
eBECSurvey	eBECS Survey	2.1.6	5/28/2017	Unmanaged	eBECS Survey Solution	2.1.6 - Bug fixes after removing XrmSvcToolkit references...

- Otherwise install latest solution in CRM



Resco MobileCRM Woodford v10.0.3.0

Microsoft Dynamics CRM 2011, 2013 & 2015 Integration

Download for 2011

Download for 2013, 2015 & 2016

Standalone application

Install

Please press the install button to install the MobileCRM Woodford application to your desktop computer.

Required minimal Mobile CRM version 10.0+

Please before installing the new version of the Woodford make a backup of your current mobile project with the installed version.

Woodford Version History

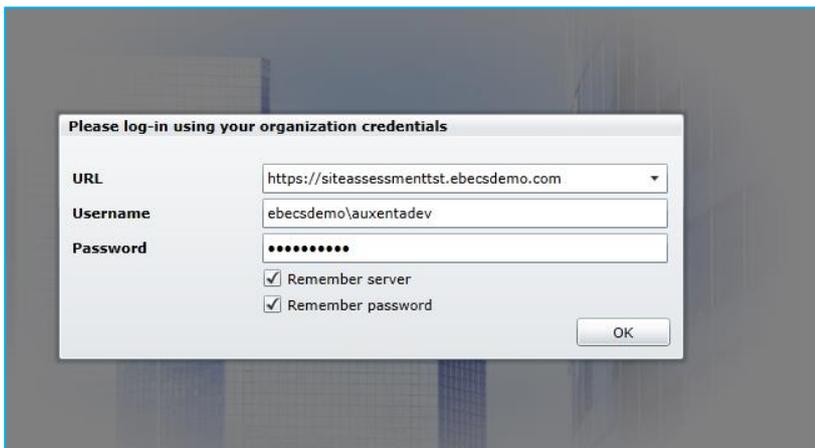
- Import latest solution of Site Assessment Survey in to target environment

1 Getting Start with Configuring RESCO Mobile CRM Project

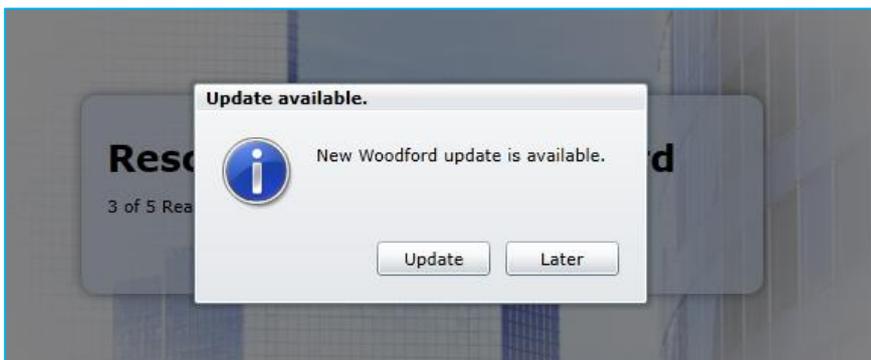
1.1.1 Connect to Dynamic 365 Solution

Open installed Woodford desktop client

Enter CRM environment details to connection wizard



If Woodford solution proposed update solution you can skip it

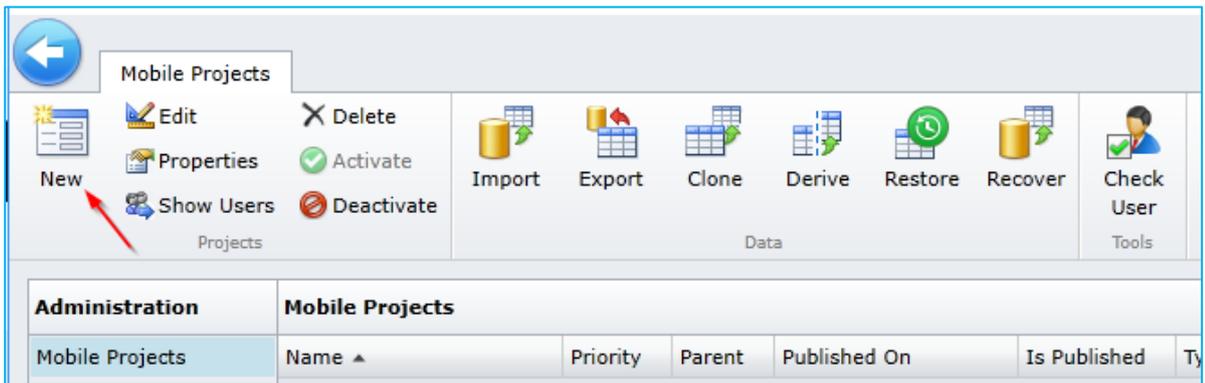


1.1.2 Create New Mobile Solution

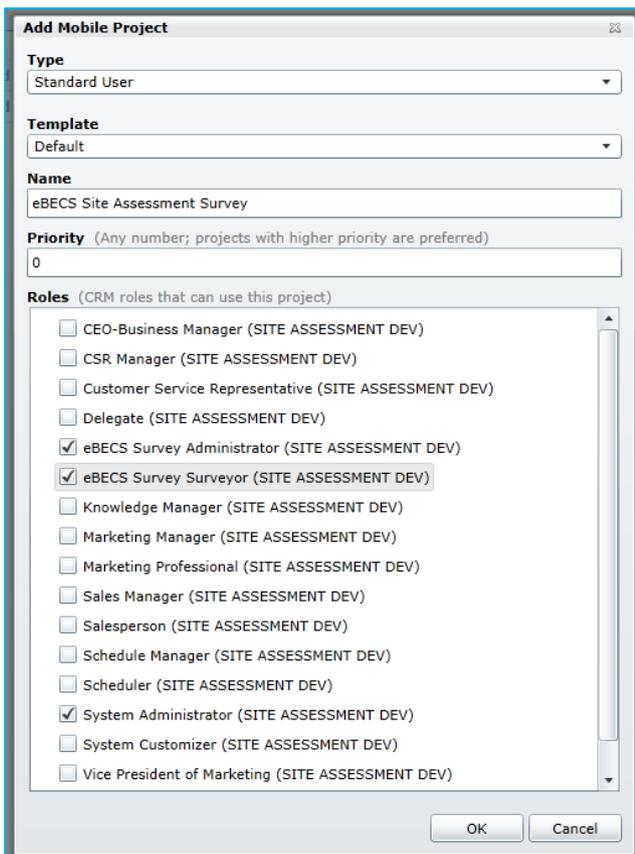
If there were no existing mobile project then create new mobile project.

Refer Woodford Guide for more details: https://www.resco.net/downloads/Woodford_Guide.pdf

Click on New button to create new solution

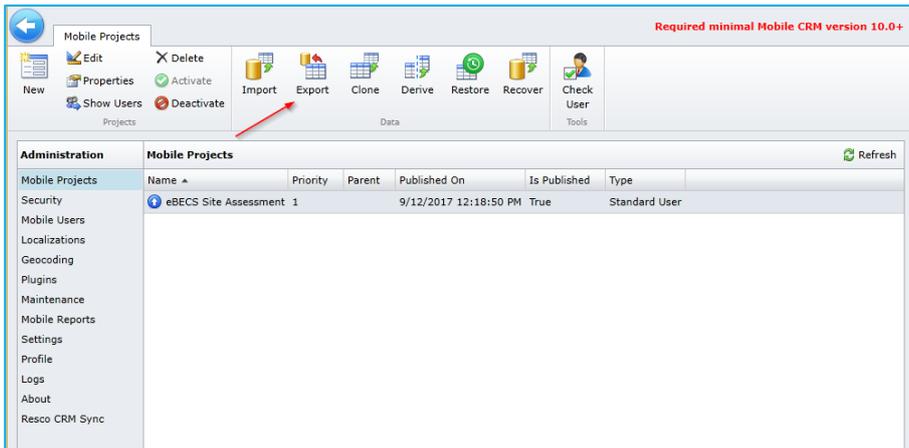


Add the name for project and select relevant security roles



1.1.3 Backup Existing Project

It should be mandatory action to backup existing solution before applying new changes. Using export button user can export the existing project easily.

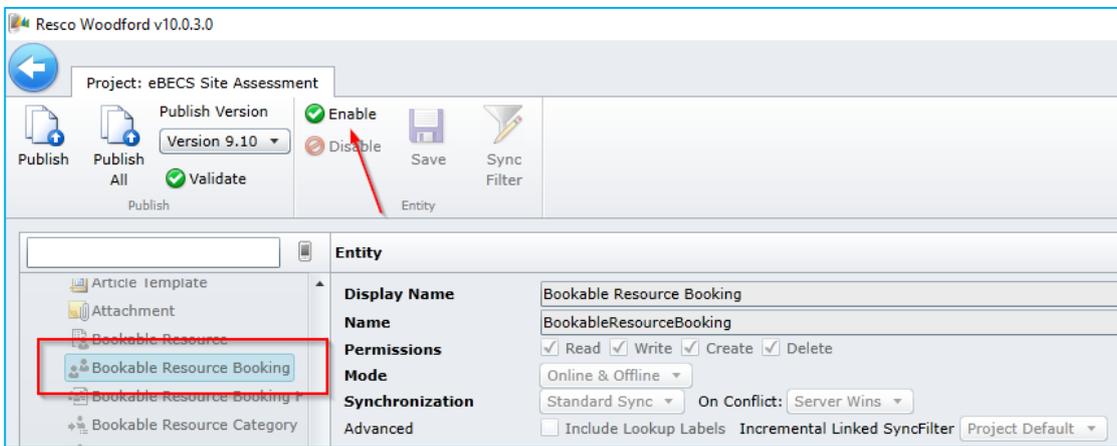


2 Perform Entity Customizations

Before proceeding with customizations need to enable survey related entities in mobile project.

2.1.1 Enable Entities

To enable entities, select the relevant entity and click on enable button then entity will be added to the solution.



2.1.2 Enable Entity Field

After enable entity need to add necessary fields of that entity to solution. After selecting relevant fields click on Save icon and it will save changes.

Warning:

Selecting fields and click on save button while system in saving mode, sometime will not save new changes.

Project: eBECS Site Assessment

Entity

Display Name: Conducted Survey
Name: ebecssvy_conductedsurvey
Permissions: Read Write Create Delete
Mode: Online & Offline
Synchronization: Standard Sync On Conflict: Server Wins
 Include Lookup Labels Incremental Linked SyncFilter

Fields

Display Name	Name	Type	Permissions
<input checked="" type="checkbox"/> Conducted Survey	ebecssvy_conductedsurveyId	Primary Key	RC-
<input checked="" type="checkbox"/> Created By	CreatedBy	Lookup	R--
<input checked="" type="checkbox"/> Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/> Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/> Creator	ebecssvy_Creator	Lookup	RCU
<input checked="" type="checkbox"/> Date	ebecssvy_Date	Date and Time	RCU
<input checked="" type="checkbox"/> Date Completed	ebecssvy_DateCompleted	Date and Time	RCU
<input checked="" type="checkbox"/> FinalScore	ebecssvy_FinalScore	Decimal Number	RCU
<input type="checkbox"/> Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input checked="" type="checkbox"/> Last Seen Survey Tab Index	ebecssvy_LastSeenSurveyTabIndex	Whole Number	RCU
<input checked="" type="checkbox"/> Modified By	ModifiedBy	Lookup	R--
<input checked="" type="checkbox"/> Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/> Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/> Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/> Order	ebecssvy_Order	Single Line of Text	RCU
<input checked="" type="checkbox"/> Owner	OwnerId	Owner	RCU

2.1.3 Entity and Field Dictionary

Following entities and fields need to be enable.

Entity: **Conducted Survey**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input checked="" type="checkbox"/>	Conducted Survey	ebecssvy_conductedsurveyId	Primary Key	RC-
<input checked="" type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input checked="" type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Creator	ebecssvy_Creator	Lookup	RCU
<input checked="" type="checkbox"/>	Date	ebecssvy_Date	Date and Time	RCU
<input checked="" type="checkbox"/>	Date Completed	ebecssvy_DateCompleted	Date and Time	RCU
<input checked="" type="checkbox"/>	FinalScore	ebecssvy_FinalScore	Decimal Number	RCU
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input checked="" type="checkbox"/>	Last Seen Survey Tab Index	ebecssvy_LastSeenSurveyTabIndex	Whole Number	RCU
<input checked="" type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Order	ebecssvy_Order	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input checked="" type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input checked="" type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input checked="" type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input checked="" type="checkbox"/>	Parent Conducted Survey	ebecssvy_ParentConductedSurvey	Lookup	RCU
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input checked="" type="checkbox"/>	Response GUID	ebecssvy_ResponseGUID	Single Line of Text	RCU
<input type="checkbox"/>	SelectImageTab	ebecssvy_SelectImageTab	Two Options	RCU
<input type="checkbox"/>	SelectSurveyTab	ebecssvy_SelectSurveyTab	Two Options	RCU
<input checked="" type="checkbox"/>	Status	StateCode	Status	R-U
<input checked="" type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	SurveyTemplate	ebecssvy_SurveyTemplateId	Lookup	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--
23/30 Selected				

Entity: **Designer Image**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/>	EntityImageId	EntityImageId	Unique Identifier	R--
<input checked="" type="checkbox"/>	Frame	ebecssvy_Frame	Lookup	RCU
<input checked="" type="checkbox"/>	Image	EntityImage	Image	RCU
<input checked="" type="checkbox"/>	Image Reference	ebecssvy_ImageReference	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Images	ebecssvy_imagesId	Primary Key	RC-
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input checked="" type="checkbox"/>	Is Global Image ?	ebecssvy_IsGlobalImage	Two Options	RCU
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--

Entity: **Designer Response**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input checked="" type="checkbox"/>	Conducted Survey	ebecssvy_ConductedSurvey	Lookup	RCU
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Desiner Response	ebecssvy_desinerresponseId	Primary Key	RC-
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey Tab	ebecssvy_SurveyTab	Lookup	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--
<input checked="" type="checkbox"/>	xml Response	ebecssvy_xmlResponse	Multiple Lines of Text	RCU

Entity: **Frames**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input checked="" type="checkbox"/>	Columns	ebecssvy_Columns	Whole Number	RCU
<input checked="" type="checkbox"/>	Container Type	ebecssvy_ContainerType	Option Set	RCU
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Designer Xml	ebecssvy_DesignerXml	Multiple Lines of Text	RCU
<input checked="" type="checkbox"/>	EntityImageId	EntityImageId	Unique Identifier	R--
<input checked="" type="checkbox"/>	Frame Image	EntityImage	Image	RCU
<input checked="" type="checkbox"/>	Frame Reference	ebecssvy_FrameReference	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Frames	ebecssvy_framesId	Primary Key	RC-
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input checked="" type="checkbox"/>	Rows	ebecssvy_Rows	Whole Number	RCU
<input type="checkbox"/>	Show Border	ebecssvy_ShowBorder	Two Options	RCU
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey Question	ebecssvy_question	Lookup	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--

Entity: **Picture**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input checked="" type="checkbox"/>	Conducted Survey	ebecssvy_ConductedSurvey	Lookup	RCU
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input checked="" type="checkbox"/>	Picture	ebecssvy_pictureId	Primary Key	RC-
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey Question	ebecssvy_SurveyQuestionId	Lookup	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--

Entity: **Responses**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input checked="" type="checkbox"/>	Conducted Survey	ebecssvy_ConductedSurveyId	Lookup	RCU
<input checked="" type="checkbox"/>	Contact	ebecssvy_ContactId	Lookup	RCU
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Frame image data	ebecssvy_frameimagedata	Multiple Lines of Text	RCU
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input checked="" type="checkbox"/>	Lead	ebecssvy_LeadId	Lookup	RCU
<input checked="" type="checkbox"/>	Look Up Type	ebecssvy_LookUpType	Single Line of Text	RCU
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input checked="" type="checkbox"/>	Response Score	ebecssvy_responsescore	Decimal Number	RCU
<input checked="" type="checkbox"/>	Responses	ebecssvy_responsesId	Primary Key	RC-
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey Answer	ebecssvy_SurveyAnswer	Multiple Lines of Text	RCU
<input checked="" type="checkbox"/>	Survey Answer and Id	ebecssvy_SurveyAnswerandId	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Survey Question	ebecssvy_SurveyQuestion	Multiple Lines of Text	RCU
<input checked="" type="checkbox"/>	Survey Question	ebecssvy_QuestionId	Lookup	RCU
<input checked="" type="checkbox"/>	Survey Template	ebecssvy_SurveyId	Lookup	RCU
<input type="checkbox"/>	Target Attribute Status	ebecssvy_TargetAttributeStatus	Single Line of Text	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--
<input checked="" type="checkbox"/>	XML Response	ebecssvy_XMLResponse	Multiple Lines of Text	RCU

Entity: **Survey Action**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input checked="" type="checkbox"/>	Actions	ebecssvy_actionsId	Primary Key	RC-
<input checked="" type="checkbox"/>	Actions	ebecssvy_Actions	Option Set	RCU
<input checked="" type="checkbox"/>	Alert Message	ebecssvy_AlertMessage	Single Line of Text	RCU
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Custom Filter Condition	ebecssvy_CustomFilterCondition	Multiple Lines of Text	RCU
<input checked="" type="checkbox"/>	Custom Script	ebecssvy_CustomScript	Multiple Lines of Text	RCU
<input checked="" type="checkbox"/>	Go To Next Question	ebecssvy_GoToNextQuestion	Lookup	RCU
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey Answer	ebecssvy_SurveyAnswerId	Lookup	RCU
<input checked="" type="checkbox"/>	Survey Section	ebecssvy_SurveySection	Lookup	RCU
<input checked="" type="checkbox"/>	Tab	ebecssvy_Tab	Lookup	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--

Entity: **Survey Answer**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input checked="" type="checkbox"/>	Answers	ebecssvy_answersId	Primary Key	RC-
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/>	EntityImageId	EntityImageId	Unique Identifier	R--
<input checked="" type="checkbox"/>	Image	EntityImage	Image	RCU
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input checked="" type="checkbox"/>	Max	ebecssvy_Max	Decimal Number	RCU
<input checked="" type="checkbox"/>	Min	ebecssvy_Min	Decimal Number	RCU
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Order	ebecssvy_Order	Whole Number	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input checked="" type="checkbox"/>	Score Value	ebecssvy_ScoreValue	Whole Number	RCU
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey Question	ebecssvy_QuestionsId	Lookup	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--

Entity: Survey Question

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input checked="" type="checkbox"/>	AttributeName	ebecssvy_AttributeName	Single Line of Text	RCU
<input type="checkbox"/>	Clone Question	ebecssvy_CloneQuestion	Two Options	RCU
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Disable Manual Entry	ebecssvy_DisableManualEntry	Two Options	RCU
<input checked="" type="checkbox"/>	Display Image	ebecssvy_DisplayImage	Option Set	RCU
<input type="checkbox"/>	Enable Writing To Text Fields	ebecssvy_ShowTextFields	Two Options	RCU
<input checked="" type="checkbox"/>	Entity Name	ebecssvy_EntityName	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Entity View Name	ebecssvy_EntityViewName	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Fetch Xml	ebecssvy_FetchXml	Multiple Lines of Text	RCU
<input checked="" type="checkbox"/>	Image	ebecssvy_Image	Lookup	RCU
<input checked="" type="checkbox"/>	Image Height (Px)	ebecssvy_ImageHeightPx	Whole Number	RCU
<input checked="" type="checkbox"/>	Image Width (Px)	ebecssvy_ImageWidthPx	Whole Number	RCU
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input checked="" type="checkbox"/>	Input Code	ebecssvy_InputCode	Multiple Lines of Text	RCU
<input type="checkbox"/>	Is Auto Populated	ebecssvy_IsAutoPopulated	Two Options	RCU
<input type="checkbox"/>	Is Target Field String Type	ebecssvy_isTargetFieldStringType	Two Options	RCU
<input checked="" type="checkbox"/>	Lookup Entity Name	ebecssvy_LookupEntityName	Single Line of Text	RCU
<input type="checkbox"/>	Lookup Entity Primary Name	ebecssvy_LookupEntityPrimaryName	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Mandatory when visible	ebecssvy_Mandatorywhenvisible	Two Options	RCU
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input type="checkbox"/>	Next Section	ebecssvy_NextSection	Option Set	RCU
<input checked="" type="checkbox"/>	Order	ebecssvy_QuestionOrder	Whole Number	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input checked="" type="checkbox"/>	Question	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Question Order For Section	ebecssvy_QuestionOrderInSection	Whole Number	RCU
<input checked="" type="checkbox"/>	Questions	ebecssvy_questionsId	Primary Key	RC-
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input checked="" type="checkbox"/>	Scoring	ebecssvy_Scoring	Two Options	RCU
<input checked="" type="checkbox"/>	Show As Default	ebecssvy_ShowAsDefault	Two Options	RCU
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey Section	ebecssvy_SectionName	Lookup	RCU
<input checked="" type="checkbox"/>	Survey Tab	ebecssvy_TabsId	Lookup	RCU
<input type="checkbox"/>	Target Attribute Entity Name	ebecssvy_TargetAttributeEntityName	Single Line of Text	RCU
<input type="checkbox"/>	Target RelatedAttribute	ebecssvy_TargetRelatedAttribute	Single Line of Text	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input checked="" type="checkbox"/>	Type	ebecssvy_AttributeType	Option Set	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--
<input checked="" type="checkbox"/>	Weight	ebecssvy_Weight	Decimal Number	RCU

Entity: **Survey Section**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input checked="" type="checkbox"/>	Section Order	ebecssvy_SectionOrder	Whole Number	RCU
<input checked="" type="checkbox"/>	Show As Default	ebecssvy_ShowAsDefault	Two Options	RCU
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey sections	ebecssvy_surveysectionsId	Primary Key	RC-
<input checked="" type="checkbox"/>	Survey Tab	ebecssvy_Tabname	Lookup	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--

Entity: **Survey Tab**

Fields:

Fields				
	Display Name ▲	Name	Type	Permissions
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Order	ebecssvy_Order	Whole Number	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input checked="" type="checkbox"/>	Scoring	ebecssvy_Scoring	Two Options	RCU
<input checked="" type="checkbox"/>	Scoring Rule	ebecssvy_ScoringRule	Option Set	RCU
<input checked="" type="checkbox"/>	Show Designer	ebecssvy_ShowDesigner	Two Options	RCU
<input checked="" type="checkbox"/>	Show Tab Score	ebecssvy_ShowTabScore	Two Options	RCU
<input type="checkbox"/>	Status	StateCode	Status	R-U
<input type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey Template	ebecssvy_SurveyId	Lookup	RCU
<input checked="" type="checkbox"/>	Tabs	ebecssvy_tabsId	Primary Key	RC-
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--

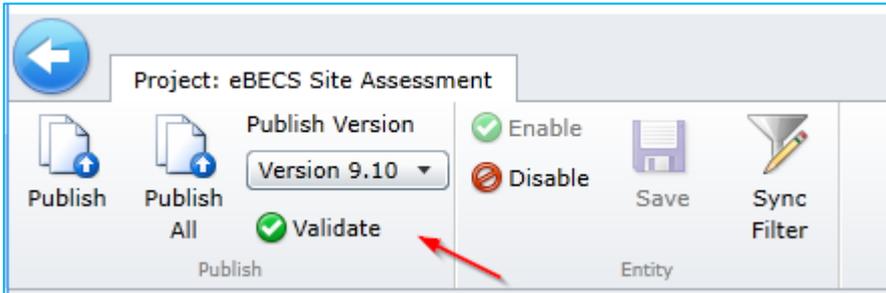
Entity: **Survey Template**

Fields:

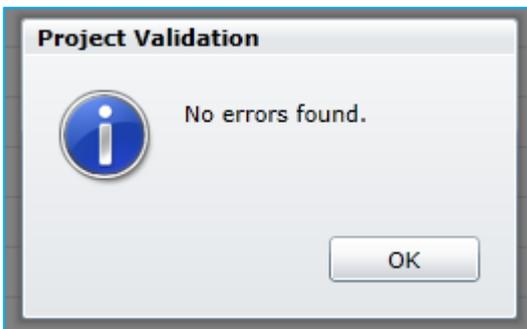
Fields				
	Display Name ▲	Name	Type	Permissions
<input type="checkbox"/>	Created By	CreatedBy	Lookup	R--
<input type="checkbox"/>	Created By (Delegate)	CreatedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Created On	CreatedOn	Date and Time	R--
<input type="checkbox"/>	Import Sequence Number	ImportSequenceNumber	Whole Number	RC-
<input type="checkbox"/>	Is Survey Response Report	ebecssvy_IsSurveyResponseReport	Two Options	RCU
<input type="checkbox"/>	IsClone?	ebecssvy_IsClone	Two Options	RCU
<input type="checkbox"/>	Modified By	ModifiedBy	Lookup	R--
<input type="checkbox"/>	Modified By (Delegate)	ModifiedOnBehalfBy	Lookup	R--
<input checked="" type="checkbox"/>	Modified On	ModifiedOn	Date and Time	R--
<input checked="" type="checkbox"/>	Name	ebecssvy_name	Single Line of Text	RCU
<input type="checkbox"/>	Order	ebecssvy_Order	Single Line of Text	RCU
<input checked="" type="checkbox"/>	Owner	OwnerId	Owner	RCU
<input type="checkbox"/>	Owning Business Unit	OwningBusinessUnit	Lookup	R--
<input type="checkbox"/>	Owning Team	OwningTeam	Lookup	R--
<input type="checkbox"/>	Owning User	OwningUser	Lookup	R--
<input type="checkbox"/>	Record Created On	OverriddenCreatedOn	Date and Time	RC-
<input type="checkbox"/>	Score Divisor	ebecssvy_scoredivisor	Whole Number	RCU
<input checked="" type="checkbox"/>	Scoring	ebecssvy_Scoring	Two Options	RCU
<input checked="" type="checkbox"/>	Scoring Rule	ebecssvy_ScoringRule	Option Set	RCU
<input checked="" type="checkbox"/>	Show Signature On Survey	ebecssvy_ShowSignatureOnSurvey	Two Options	RCU
<input checked="" type="checkbox"/>	Status	StateCode	Status	R-U
<input checked="" type="checkbox"/>	Status Reason	StatusCode	Status Reason	RCU
<input checked="" type="checkbox"/>	Survey	ebecssvy_surveyId	Primary Key	RC-
<input type="checkbox"/>	SurveyTempDuplicateCreationPlugin	ebecssvy_SurveyTempDuplicateCreationPlugin	Two Options	RCU
<input type="checkbox"/>	Time Zone Rule Version Number	TimeZoneRuleVersionNumber	Whole Number	RCU
<input type="checkbox"/>	UTC Conversion Time Zone Code	UTCConversionTimeZoneCode	Whole Number	RCU
<input type="checkbox"/>	Version Number	VersionNumber	Version Number	R--

2.1.4 Validate Customizations

After performing the customization user can validate performed customizations using inbuilt validate function.

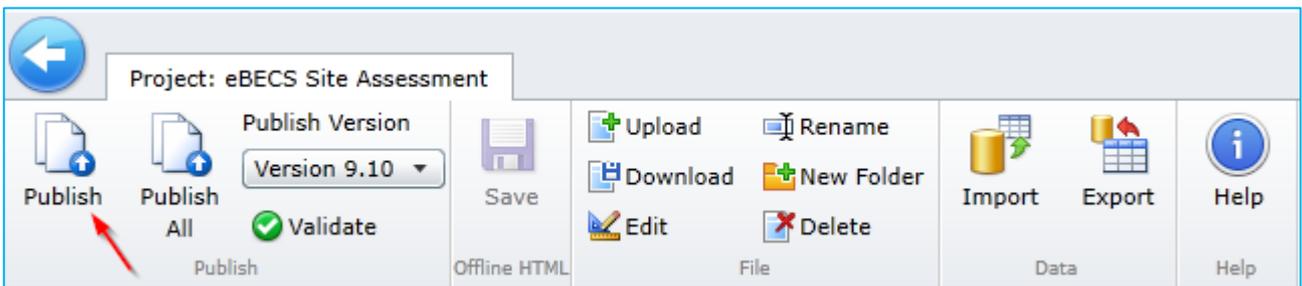


If all customizations are valid then it will show no error found message.



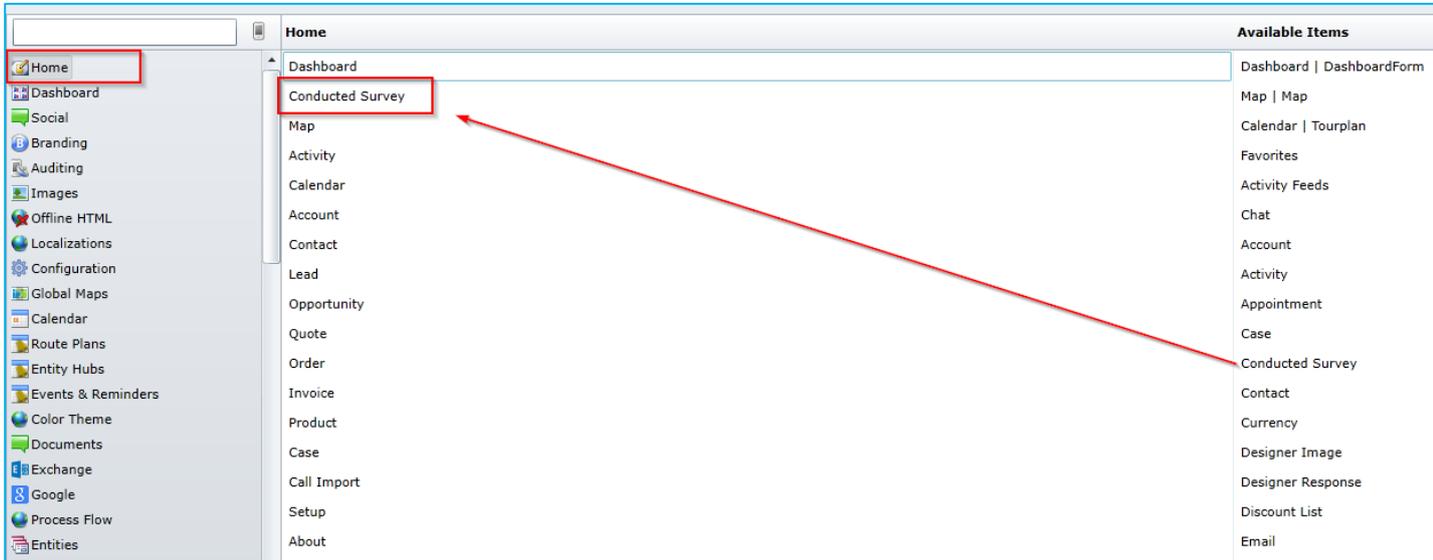
2.1.5 Publish Customizations

After validating customizations then need to publish them.



2.1.6 Home Menu Customization

To show conducted survey in the RESCO Mobile CRM menu, need to add conducted survey entity to home. In the Home it shows all available entities and only thing need to do is drag and drop Conducted Survey item to correct place in the Home menu.



2.1.7 Adding Views

To view existing conducted surveys, need to create filtered views for the conducted survey entity

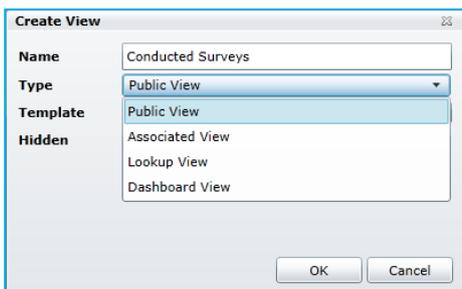
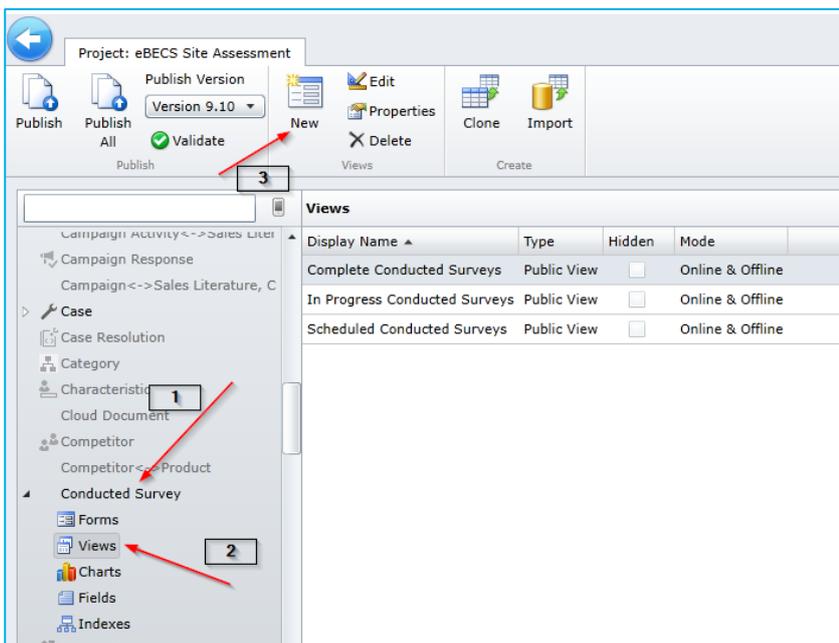
Following 3 views need to be created

1. Scheduled Conducted Surveys
2. In Progress Conducted Surveys
3. Completed Conducted Surveys

2.1.8 How to create view

To create views, need to follow following steps

1. Navigate to entity
2. Click on views
3. Click on New
4. Give the name of the view and set Type to Public



2.1.9 Create Scheduled Conducted Surveys View

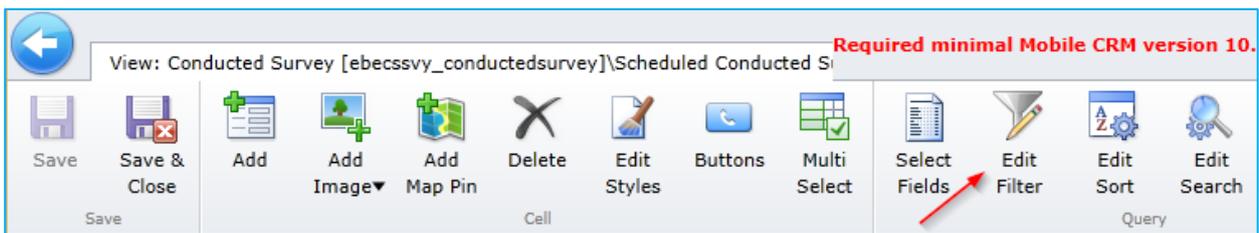
Any field available in the Fields Explorer can drag and drop in to the view. Using properties can change the text properties.

The screenshot shows the Designer tool interface. On the left is the Properties panel, in the middle is the Designer canvas, and on the right is the Fields Explorer. The Properties panel is expanded to the 'Cell' section, showing the following values: Left: 8, Top: 2, Width: 227, Height: 24, Kind: Text, Style: primary, Binding: ebecssvy_name. The Designer canvas shows a text field with the text 'Name' and a blue selection box around it. The Fields Explorer on the right lists various fields, with 'Name' highlighted in blue. The 'SurveyTemplate' field is also visible in the list.

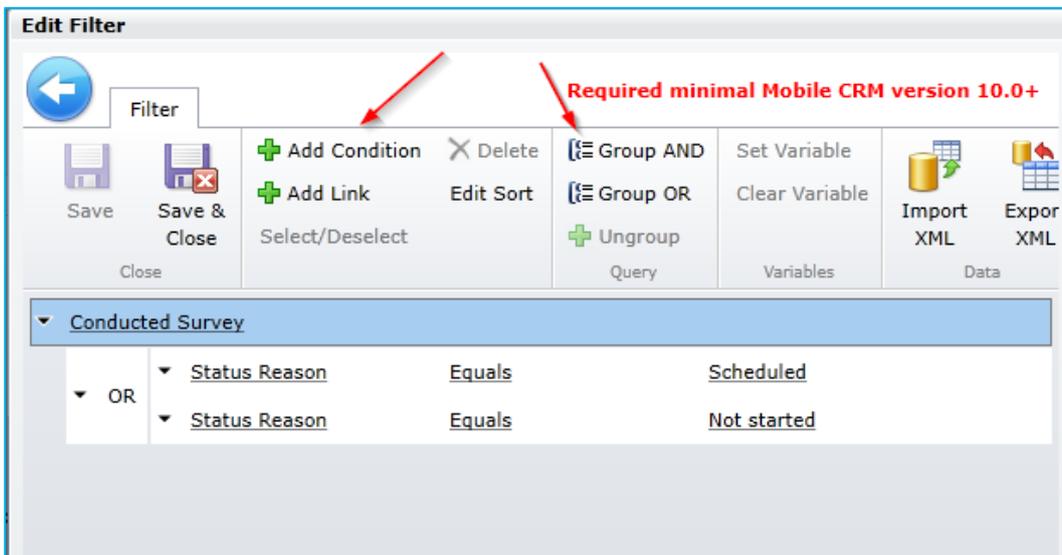
The screenshot shows the Designer tool interface. On the left is the Properties panel, in the middle is the Designer canvas, and on the right is the Fields Explorer. The Properties panel is expanded to the 'Cell' section, showing the following values: Left: 122, Top: 21, Width: 118, Height: 18, Kind: Text, Style: r_gray, Binding: ebecssvy_surveyt. The Designer canvas shows a text field with the text 'Name' and a blue selection box around it. The Fields Explorer on the right lists various fields, with 'Name' highlighted in blue. The 'SurveyTemplate' field is also visible in the list.

Adding Filter to the view

Click on the Filter Editor in the ribbon then it will appear the filter popup window. Using filter conditions can set the records which should be show in the view.

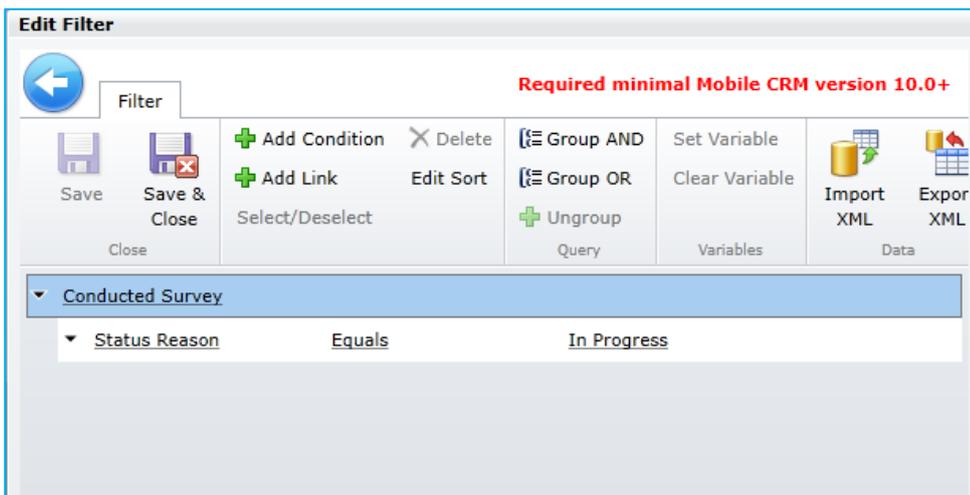


Using Group option can group multiple conditions together



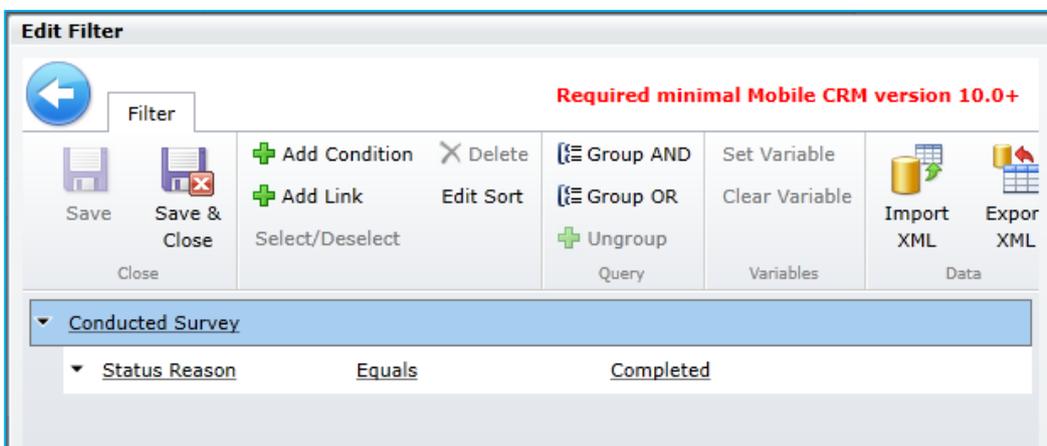
2.1.10 Create In-Progress Conducted Surveys View

This view use same fields like Scheduled Conducted Surveys View but with different filter conditions.



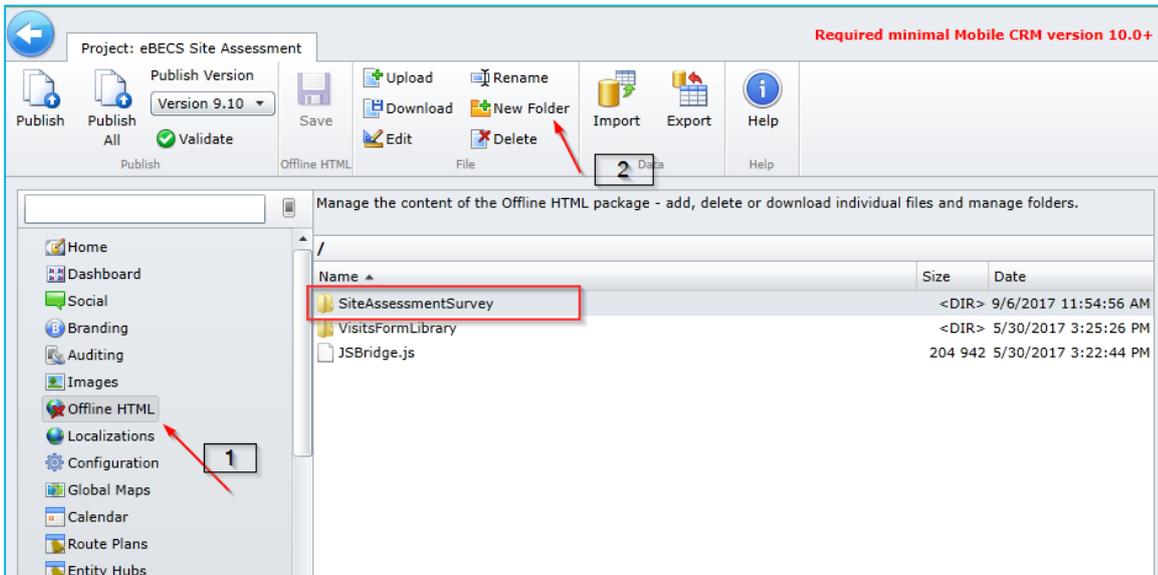
2.1.11 Create Completed Conducted Surveys View

This view use same fields like Scheduled Conducted Surveys View but with different filter conditions.

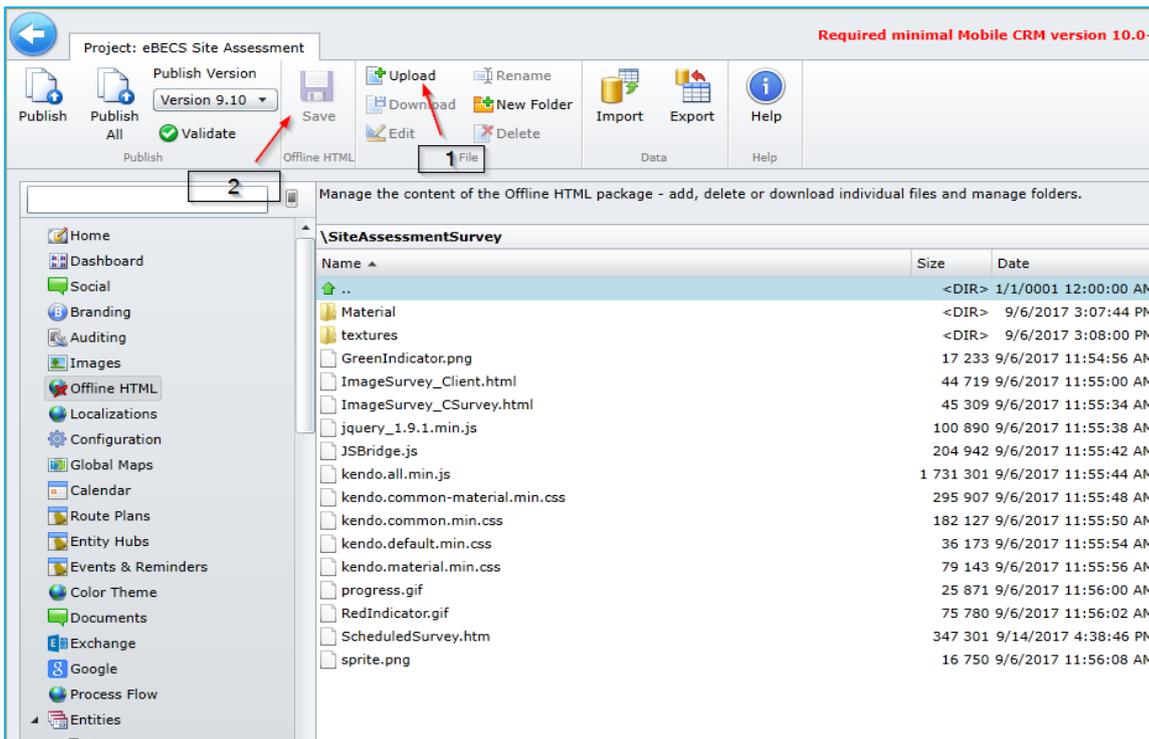


3 Setting-up Offline HTML Pages

Go to Offline HTML then create folder name called “SiteAssessmentSurvey”. Upload necessary components which taken from correct TFS branch.



Double click on the newly created folder and open it. Then upload the following content taken from TFS. Finally save the modifications.

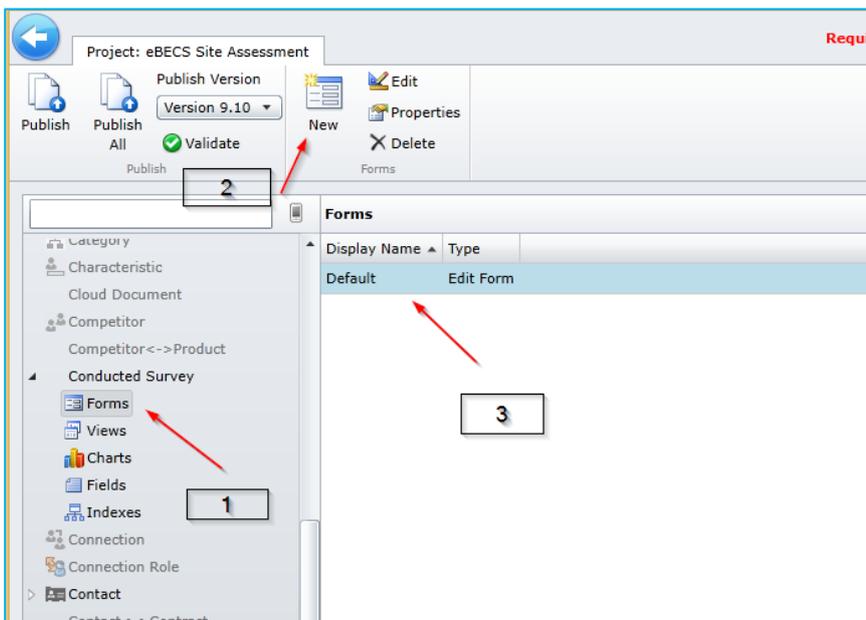


4 Create Survey Form and Setting Up

4.1.1 Create Survey Form

Follow following steps to create Conducted Survey form

1. Click on Conducted Survey and open the Menu
2. Click on Forms
3. Click on New
4. Set “Default” as name of the view



To complete Survey form need to perform following tasks

1. Create tab with survey details
2. Create iFrame tab for Take Survey
3. Create iFrame tab Image Survey
4. Create Signature tab (Media Tab)
5. Create List tab for Responses

For more details how to create iFrame tab, Media Tab and Detail List refer the Woodford reference guide.

This is how completed form looks like

Form: Conducted Survey [ebecssvy_conductedsurvey]\Default Required minimal Mobile CRM version 10.0+

Save **Save & Close** **Add Field** **Add Image** **Add Spacer** **Edit Styles** **Add Detail** **Add List** **Add IFrame** **Add Map** **Add Media** **Add Wall** **Move Up** **Move Down** **Delete** **Rename** **Properties** **Layout** **On Load** **On Change** **On Save** **Edit**

Properties **Designer** **Fields** Search

Binding: General
Side: Left
Header: Icon & Label
Width: Normal
Height: 2

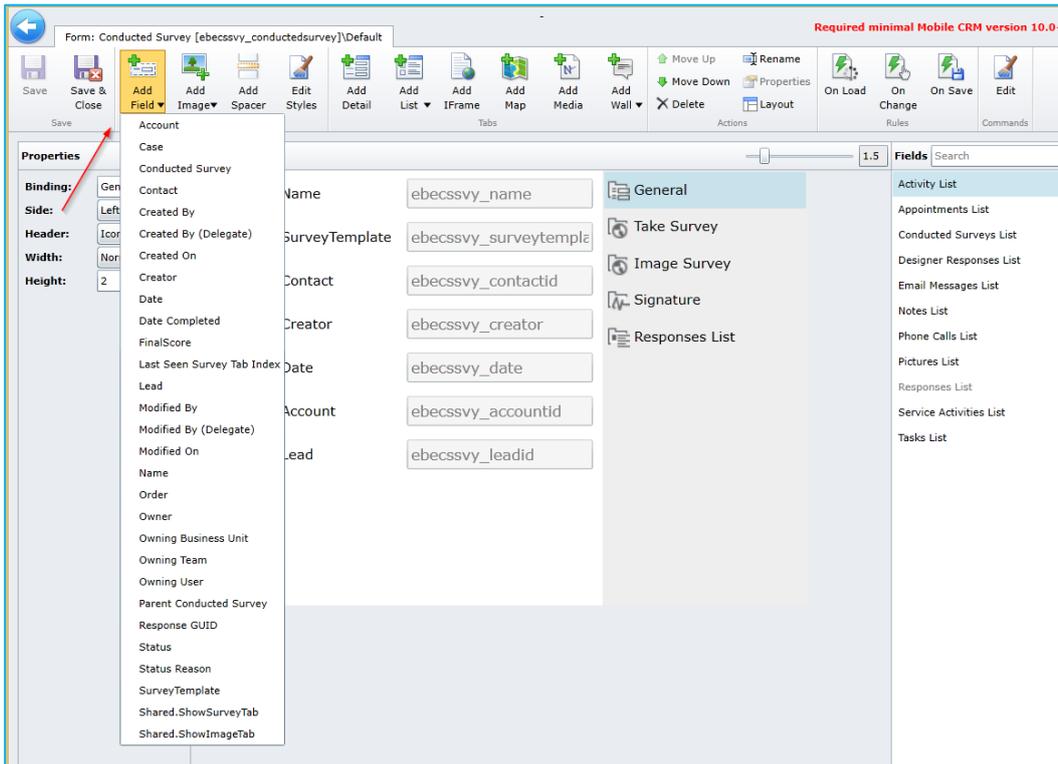
Name	ebecssvy_name
SurveyTemplate	ebecssvy_surveytempl
Contact	ebecssvy_contactid
Creator	ebecssvy_creator
Date	ebecssvy_date
Account	ebecssvy_accountid
Lead	ebecssvy_leadid

General
Take Survey
Image Survey
Signature
Responses List

- Activity List
- Appointments List
- Conducted Surveys List
- Designer Responses List
- Email Messages List
- Notes List
- Phone Calls List
- Pictures List
- Responses List
- Service Activities List
- Tasks List

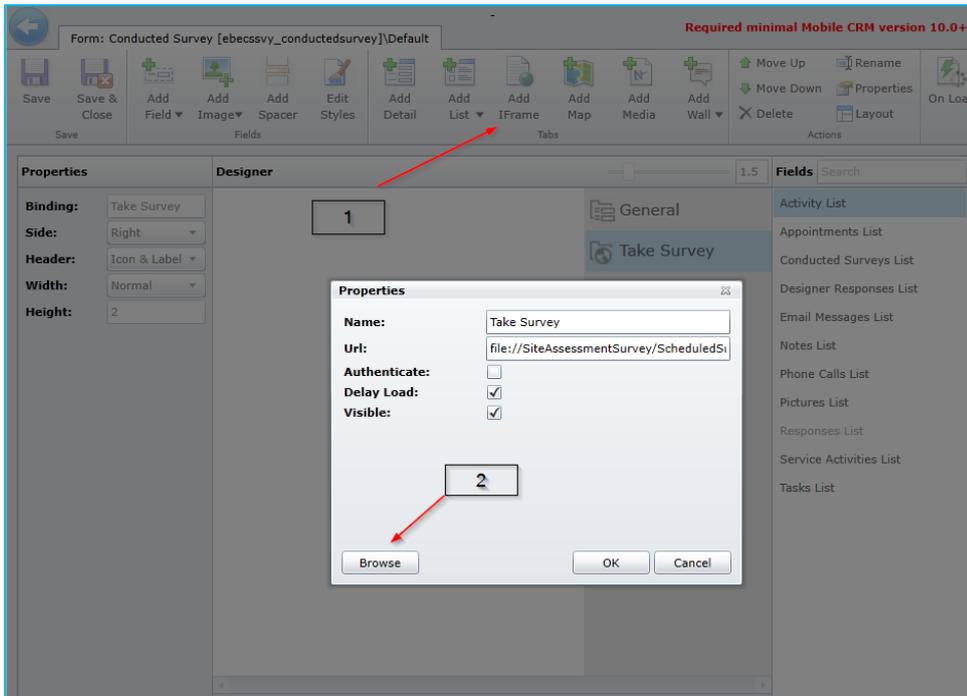
4.1.2 Create Tab with Survey Details

To add fields to general tab select the general tab and click on Add Field button. Then user can add the field to the tab. If user need to delete the field from the tab, select the field first then click on delete. If user need to re arrange the order of the fields, select relevant field then drag and drop to new position.



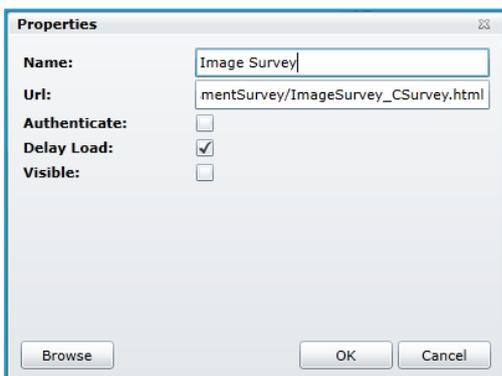
4.1.3 Adding Take Survey iFrame

First click on Add iFrame button and link “ScheduleSurvey.html” file using browser action.



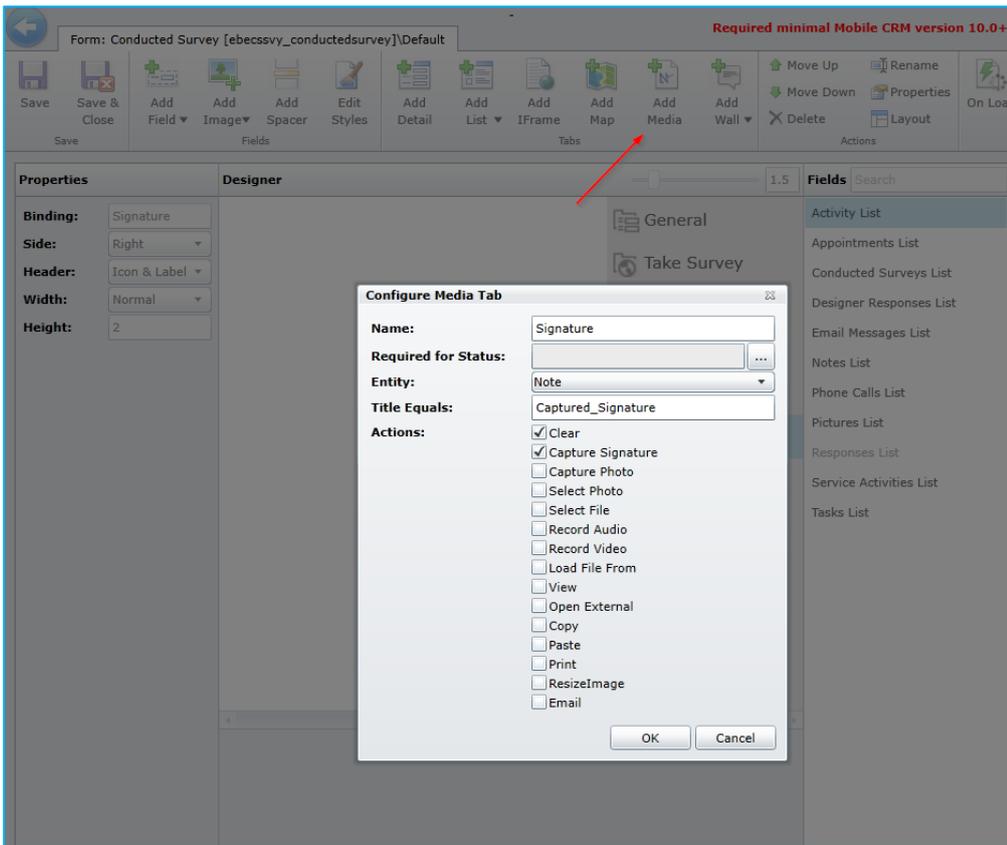
4.1.4 Adding Image Survey iFrame

Click on Add iFrame button and link “ImageSurvey_CSurvey.html” file using browser action.



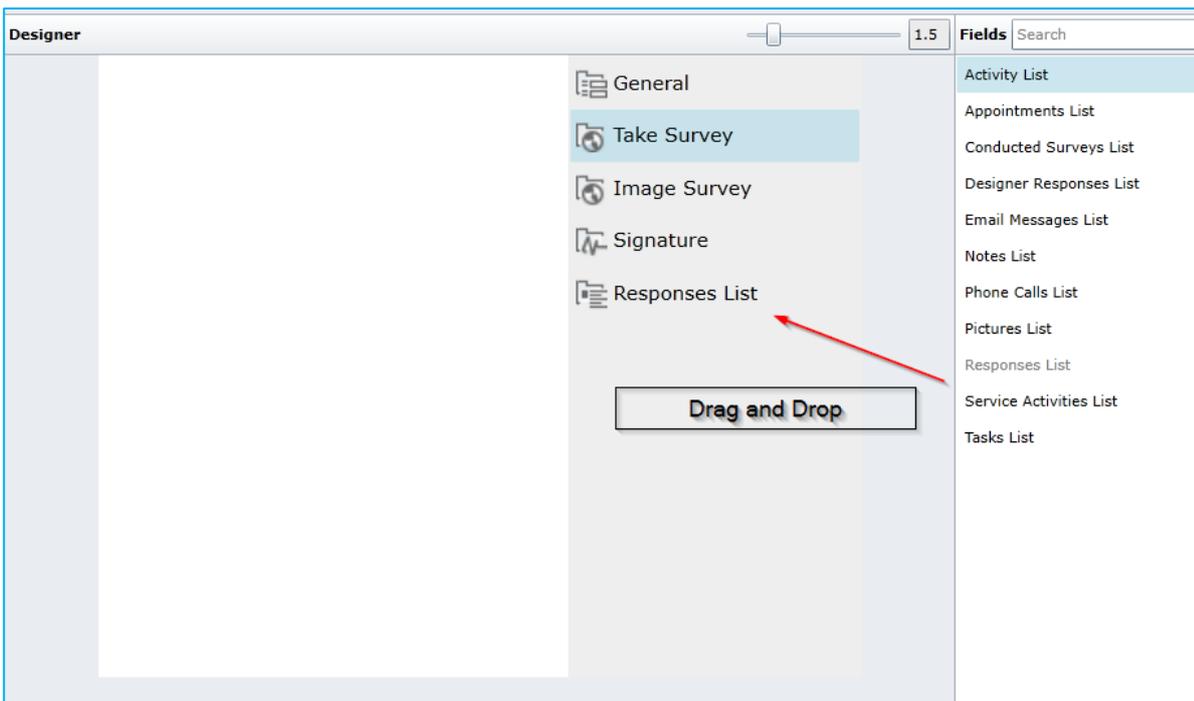
4.1.5 Adding Signature Tab

Click on Add media tab, then it will show up property window then fill it with following setting



4.1.6 Create Response List Tab

There are lists available for Conducted Survey entity based on the relationship. Use list pane to drag and drop list to the form.

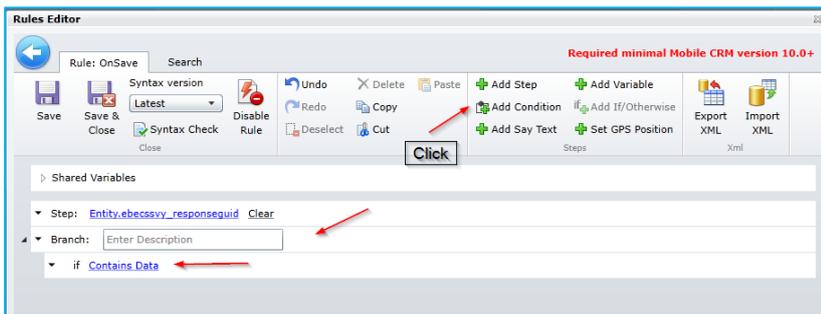


4.1.7 Configuring On-Load, On-Change and On-Save events for Take Survey

To view already configured tabs based on the status of the survey, need to configure on load, on change and on save events.

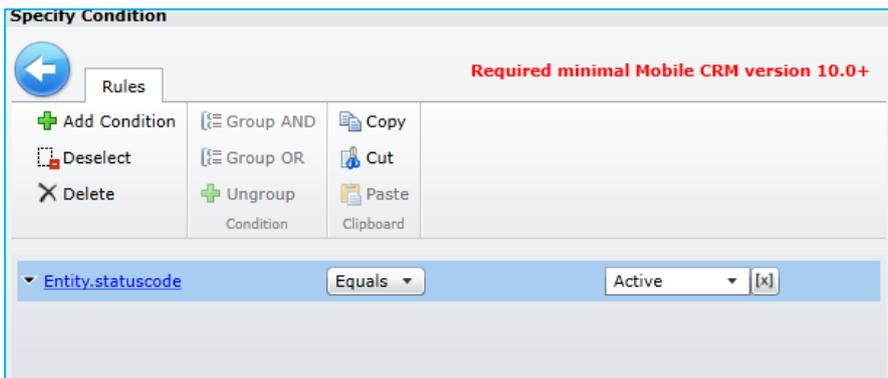
4.1.8 How to Add Condition

To add condition click on Add Condition button and setup if condition like following.



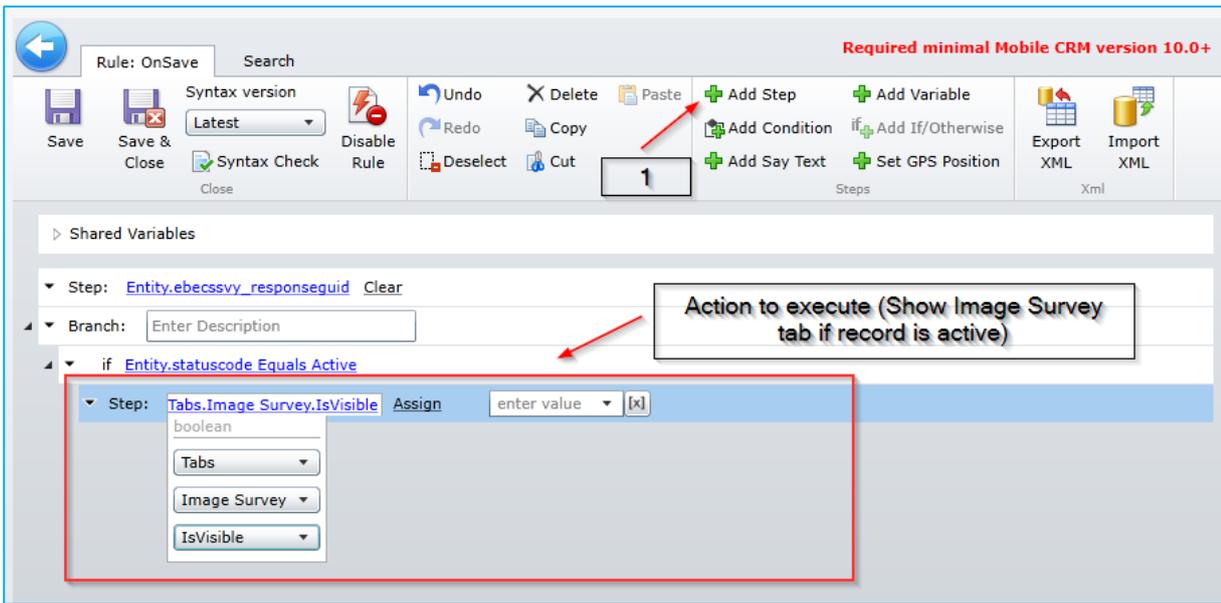
4.1.9 Configure If statement

Click on condition already added by Woodford and it will pop up a window which can configure IF condition based on user preference.



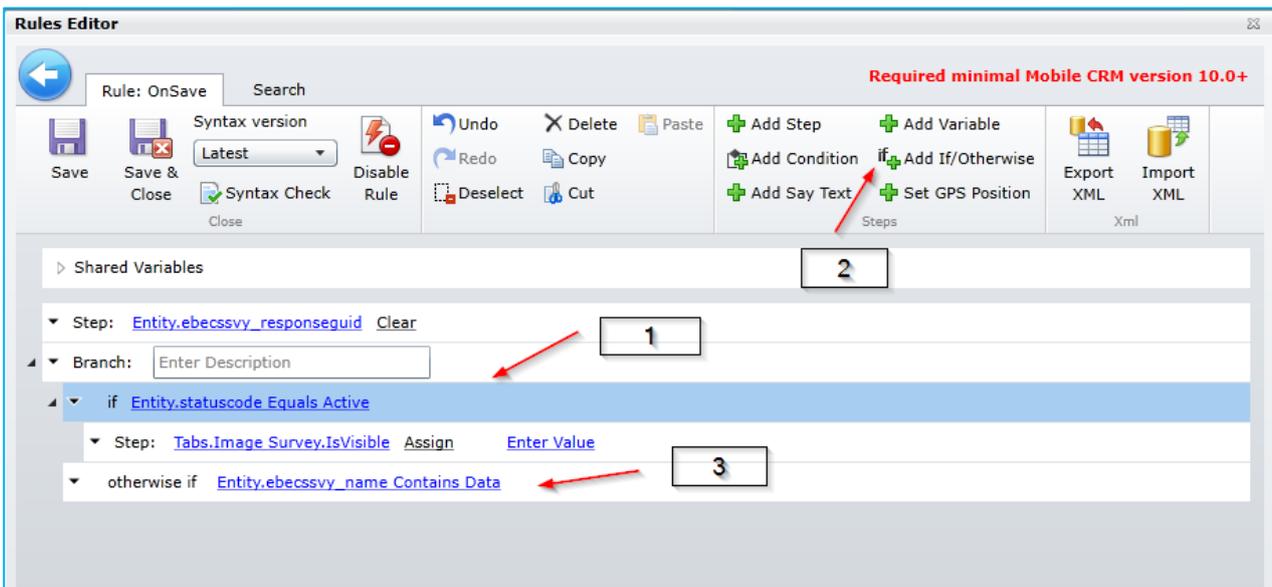
4.1.10 Add Step

After configure the IF condition user can add Step which contains the action which execute after meet the criteria of IF condition.



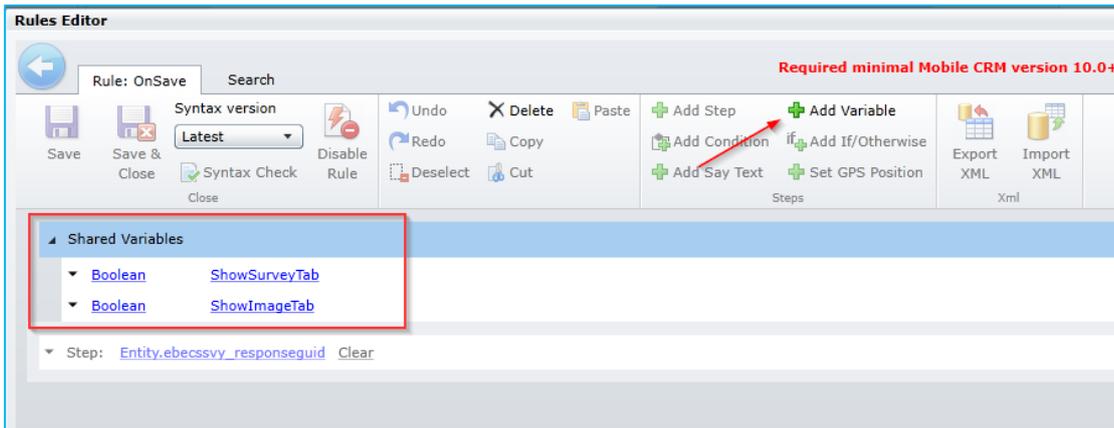
4.1.11 Add If/Otherwise

To add Otherwise if need to select exiting If condition or Otherwise if condition. Then click on Add If/Otherwise and it will add otherwise condition to the rule edition. Use can configure the otherwise if condition like If condition or leave it like an else condition.



4.1.12 Adding Shared Variables

Woodford projects allow users to create shared variables and use them among any events in the form. Can configure shared variables like following.

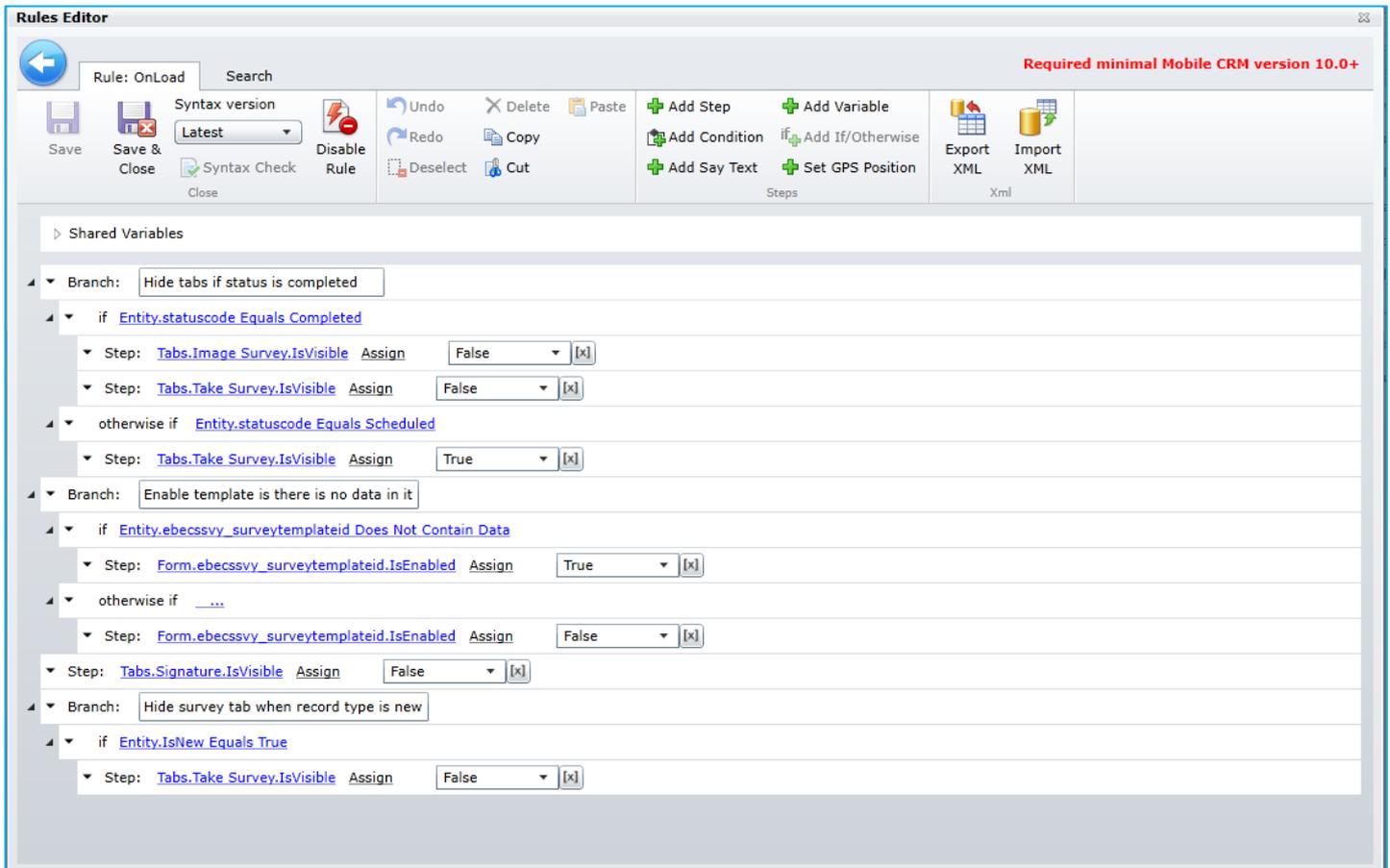


Note:

- Make sure to save after modify any of steps, condition and etc.
- Configure events after do all entity fields configurations and upload offline resources.
- Entity refer the entity record which open through the form

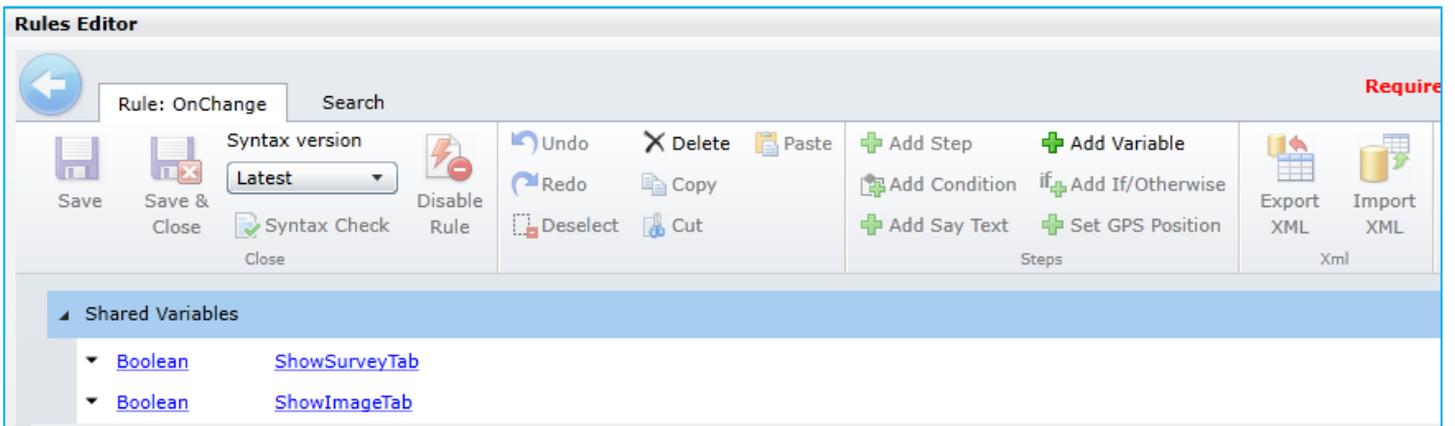
4.1.13 Configure On Load Event

Using conditions, steps and otherwise steps configure on load event like following.

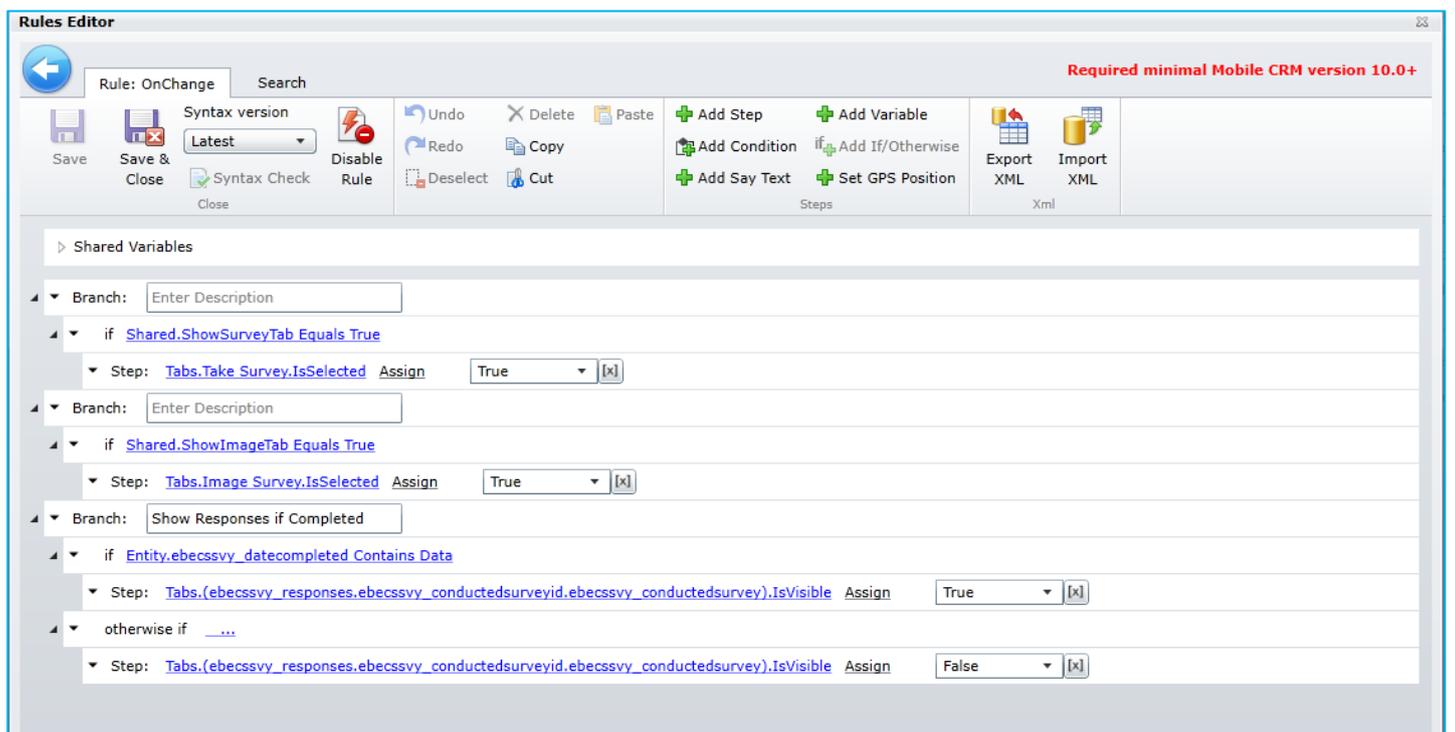


4.1.14 Configure On Change Event

Add two Boolean shared variables like following

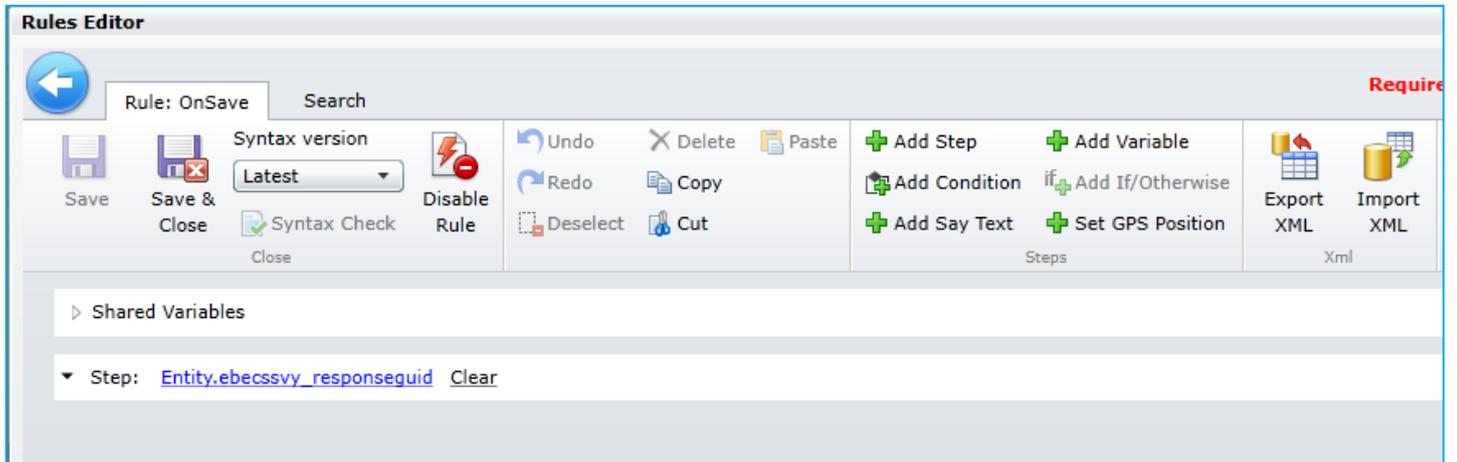


Using conditions, steps and otherwise steps configure on change event like following.



4.1.15 Configure On Save Event

Configure on save event like following,



After completing all the customizations, make sure to publish the project. Without publishing solution it won't affect the changes.