User Guide

MTC

THE CRM SERVICES VALUE SOURCE

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Product Overview

Customer Satisfaction Survey is a Microsoft Dynamics 365/CRM add-on solution that allows you to create surveys on your own from within CRM and reach out to your target audience for tracking their feedback. Responses/feedback are tracked back graphically into your CRM for quick analysis.

The survey solution extends the capability of creating wide variety of surveys including that for products and services industries.

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How to Install and Activate Customer Satisfaction Survey Solution?

To install MTC's Customer Satisfaction Survey solution from Microsoft AppSource on your D365 instance, please follow the below steps.
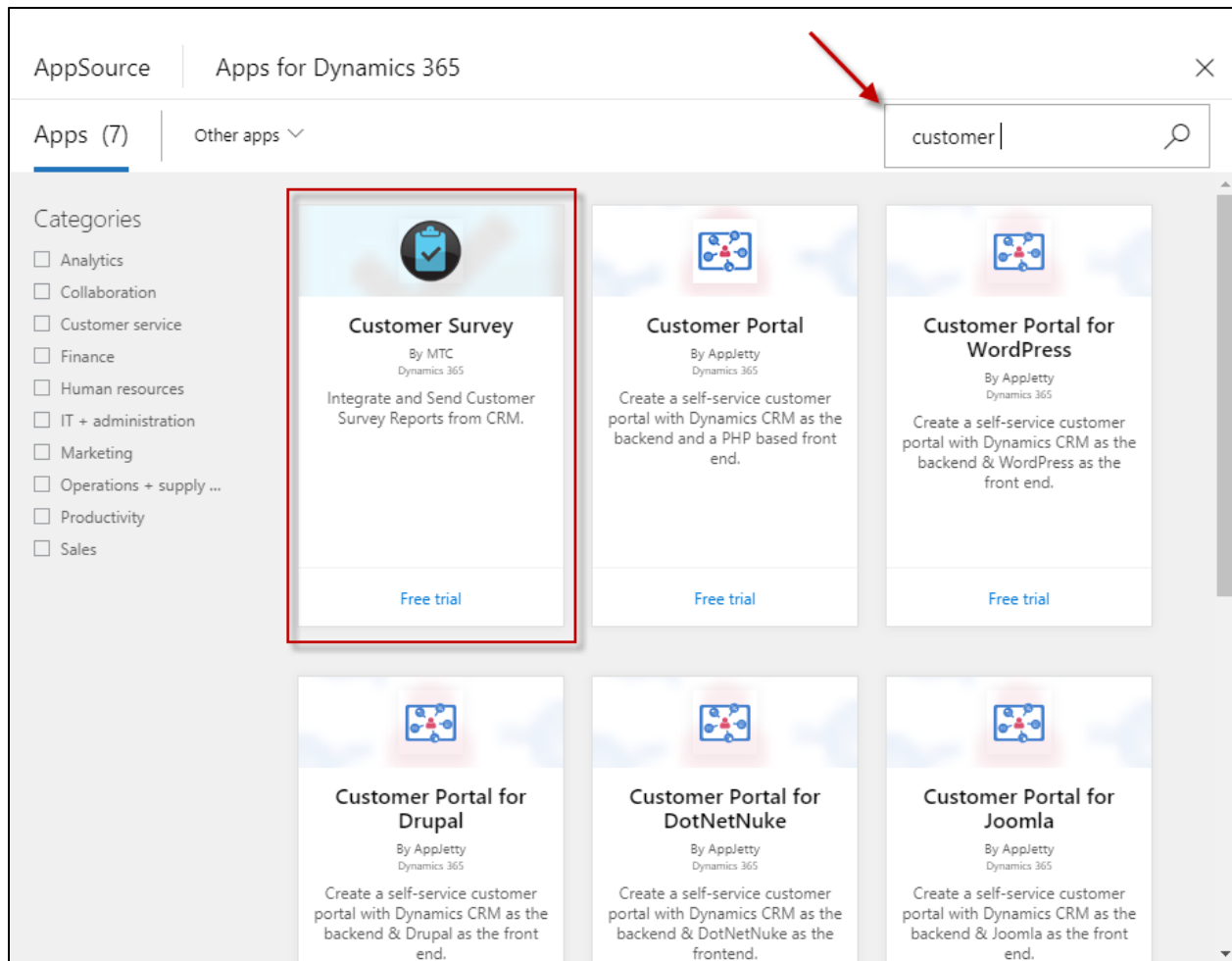
1. From your D365 instance, go to **Settings** and click on **Dynamics Marketplace** under **Customization.**
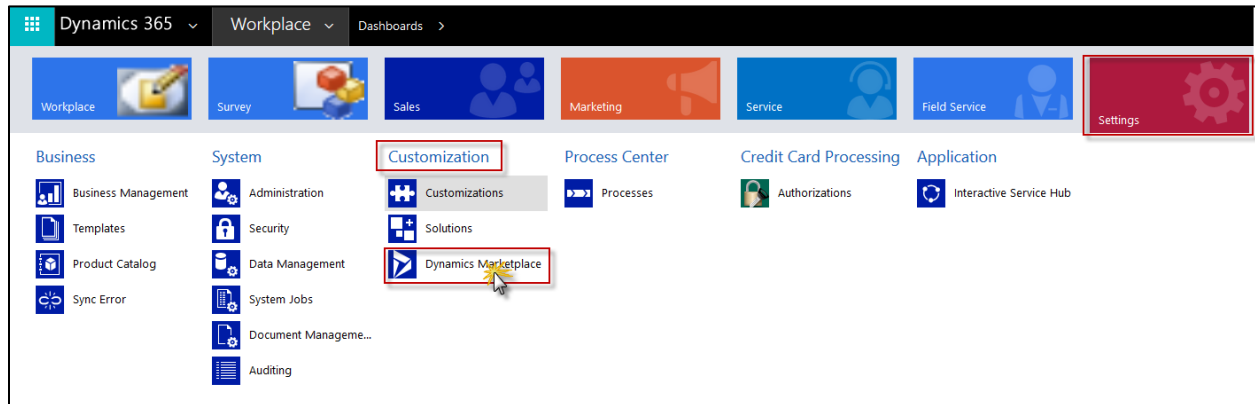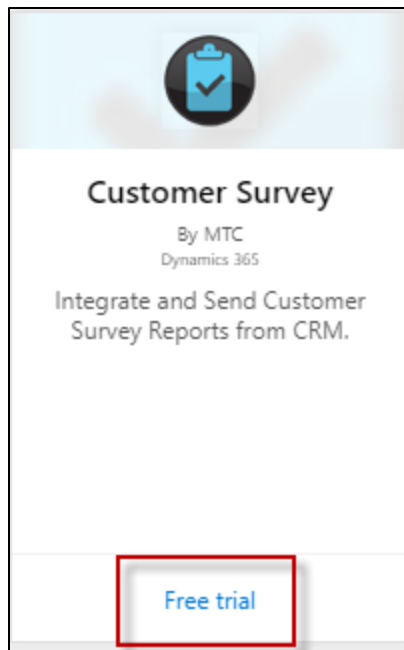

2. Apps for Dynamics 365 window box pops up as shown below.
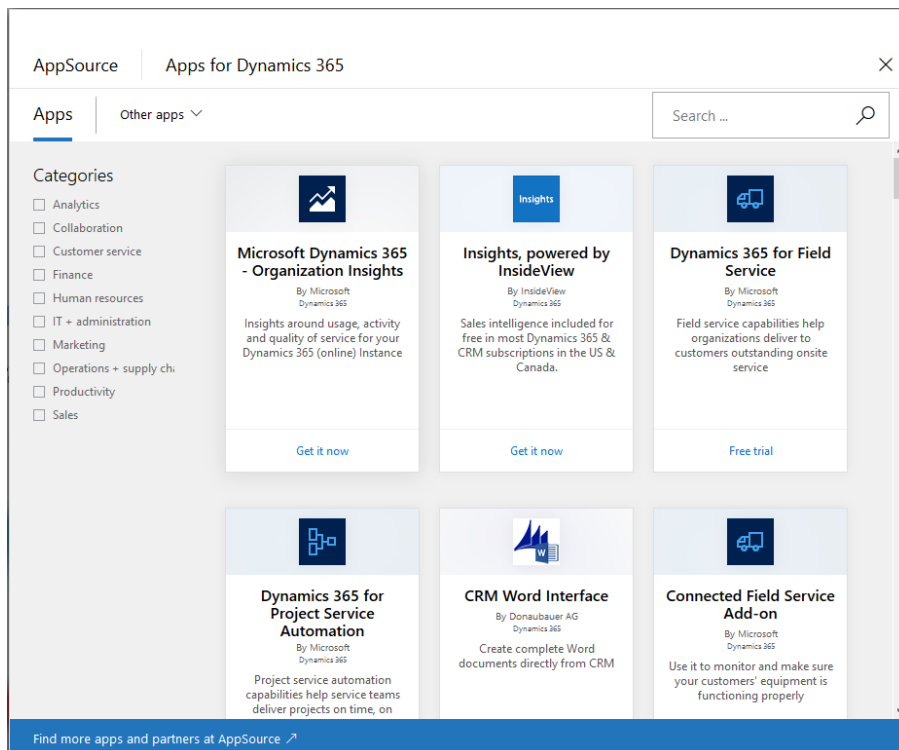
3. Enter MTC's Customer Satisfaction Survey product name in the search box and click on the SEARCH icon.

4. All relevant search results would be displayed.
5. Choose **Customer Satisfaction Survey by MTC** and click on **Free trial** to initiate a 15 day free product evaluation.

6. A Microsoft permission window pops up as shown below. Read and check the box and then click on Continue button.
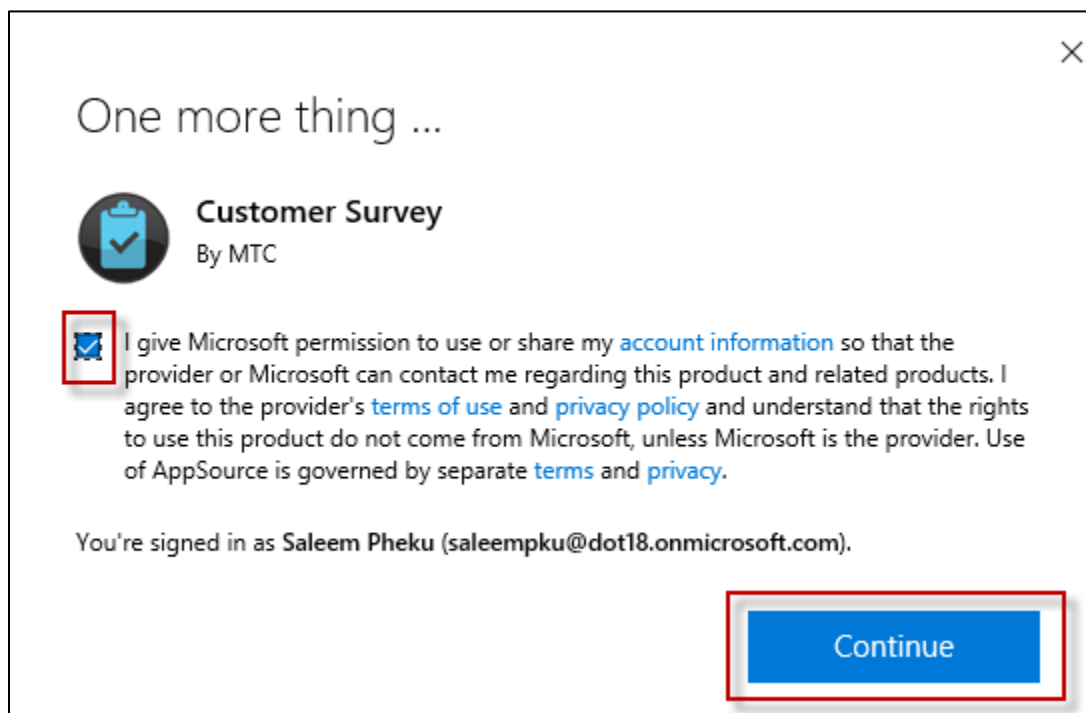
7. Add the application to Dynamics 365 page opens in another tab along with the product details. The page automatically picks the Organization Name of your D365 instance from which you are trying to install the product. Check both the boxes as shown below and click on Agree button.

8. You will be directed to Dynamics 365 Administration Center where you can track the product installation status.

9. After the status reads **Installed**, go back to your D365 Solutions Page under Settings and activate trial license following the instructions listed in this URL:

https://www.mtccrm.com/PLI

Alternatively, for installing MTC Products from Microsoft AppSource - <u>click here</u> and follow the above process listed from step 5.

Security Roles in Customer Satisfaction Survey Solution

In order to access Customer Satisfaction Survey solution, a CRM user (other than System Administrator or System Customizer) should be assigned **Survey Security Role** and **MTC License** security roles in D365 by CRM Administrator.

How to assign Security Roles for Customer Satisfaction Survey Solution in D365?

Below are the simple steps to assign **Security Roles** for Customer Satisfaction Survey Solution in D365.

1. Go to **Settings** in your CRM and Click on **Security** under **System menu**.
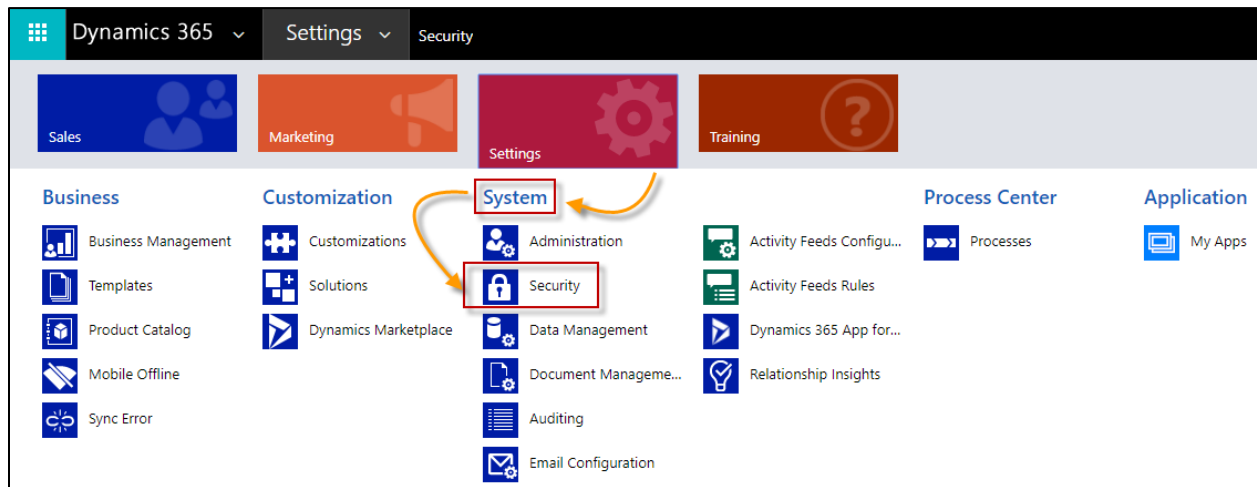
2. Security page appears as shown below.
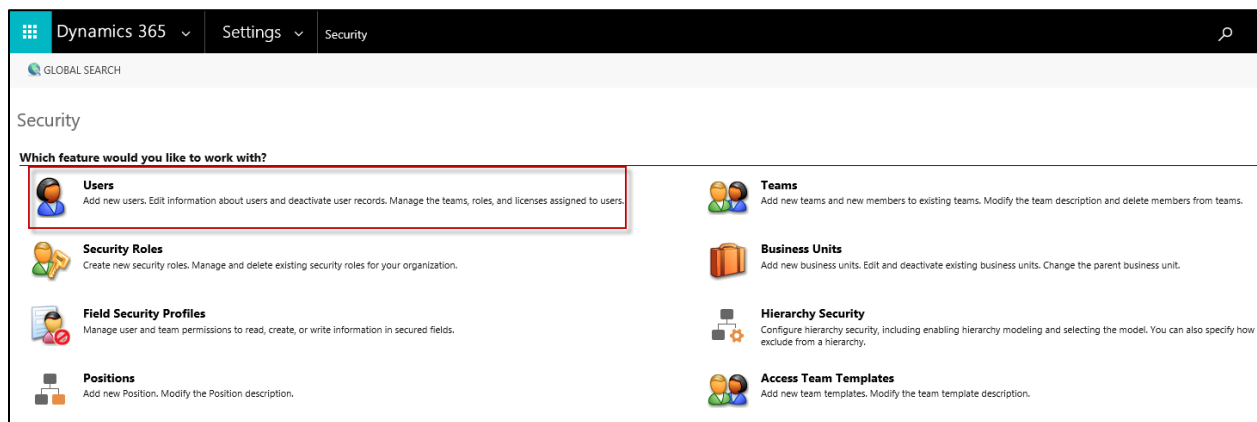
3. Click on Users. All the users available in your CRM will be displayed.

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4. Now select the User that you would like to give access to Customer Satisfaction Survey solution and click on **MANAGE ROLES** from ribbon.

5. A window pops up with all the security roles available in your CRM.

6. Select the **Survey Security Role** and **MTC License** from it and click on OK.

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7. The selected User will now be able to access the Customer Satisfaction Survey solution.
8. You can repeat the same process for assigning these security roles for other users as well.

Configuration Settings in Customer Satisfaction Survey

To start using Customer Satisfaction Survey solution, you are required to do some basic configuration settings inside your D365 as explained below.

1. Go to **Settings → Solutions**.
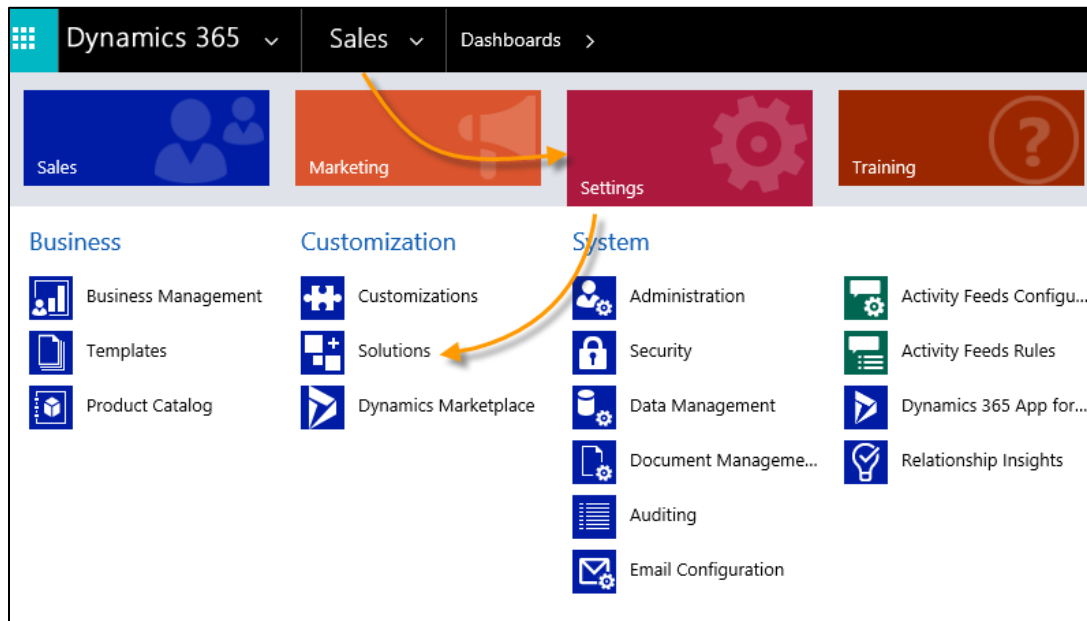
2. All the solutions installed in your D365 will show up. Click on Customer Satisfaction Survey Solution.
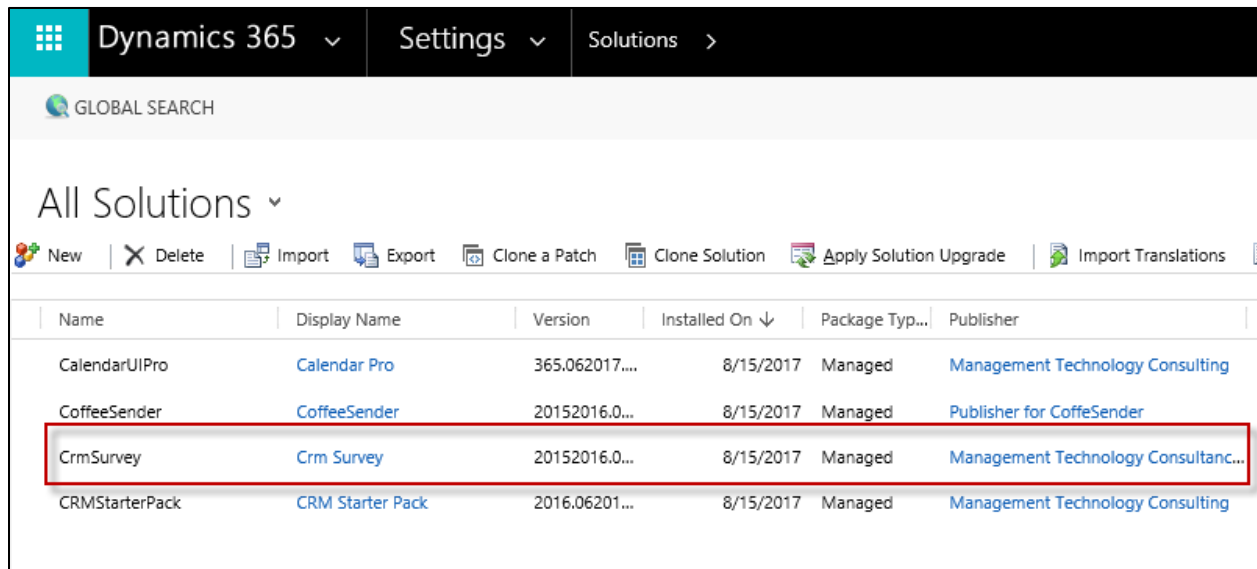
3. Customer Satisfaction Survey Settings window pops up. In here, you can see Verifying, Change Password and Upload Images.

4. Enter http://survey.mtccrm.com in you **can change the URL field** and click on Verifying link.
5. A CRM Settings window pops up. Select the radio button for (On premise, Office 365, IFDS) your CRM instance and enter CRM URL, User name and Password and click on Submit.

6. A validation check runs and displays the CRM key if the validation is successful.

CRM Settings

○ Onpremise ○ Office 365 ○ IFDS

CRM Url   [   ]

User Name   [   ]

Password   [   ]

Domain   [   ]

[Submit]

Successfully registered with this CRM Key ' 0bb7c925-dbc3-4c03-803e-bf044ffe84d9 'having following details.

CRM Url: https://dot18.crm8.dynamics.com

UserName: saleempku@dot18.onmicrosoft.com

Domain:

Crm Type: office365

7. You can now go ahead and start using the Customer Satisfaction Survey functionality.
8. At any point of time you can go ahead and change the password by simply clicking on Change Password on Customer Satisfaction Survey Settings window page.

Change Password

Old Password   [   ]

New Password   [   ]

Confirm NewPassword   [   ]

[Submit]

9. You can also upload images by clicking on Upload Images link on Customer Satisfaction Survey Settings window page.

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Note: These images could be used in the Header and Footer section of the survey form that you create.

Customer Satisfaction Survey Functionality

Considering that all the recommended Customer Satisfaction Survey configuration settings are being done, let us check Customer Satisfaction Survey Functionality.

- Click on Survey from the Sitemap of your D365 instance as shown below.
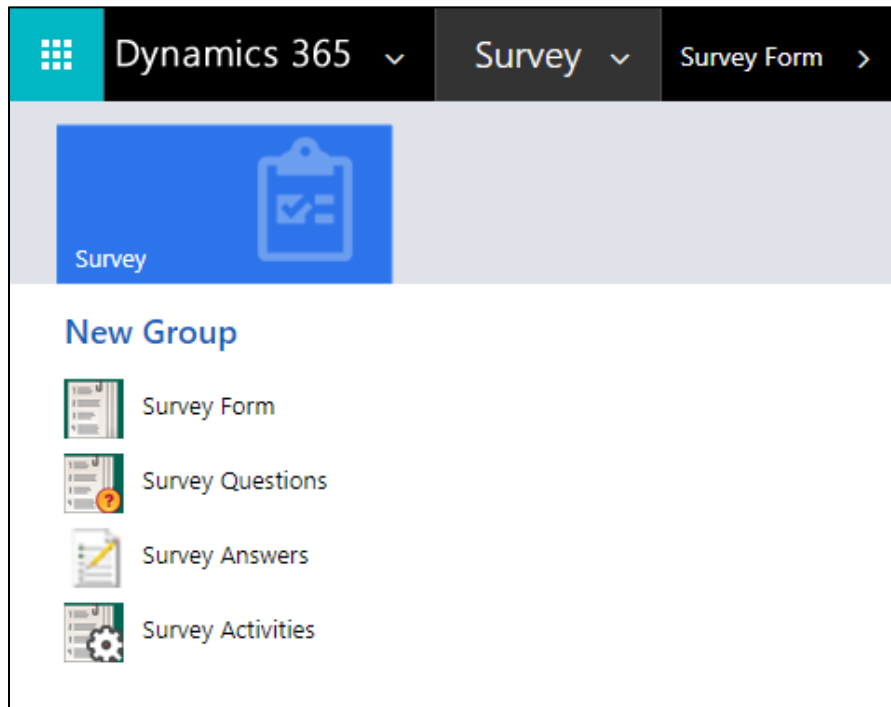
- o **Survey Form** – This form will help you to create your desired survey for targeted customers.
- o **Survey Questions** – All the survey questions that you prepare for survey forms can be seen here.
- o **Survey Answers** – All the survey answers that you provide for respective survey questions can be seen here.
- o **Survey Activities** – The summary of your survey activities can be seen here.

- Click on Survey form. All your active surveys (if any) will be displayed.
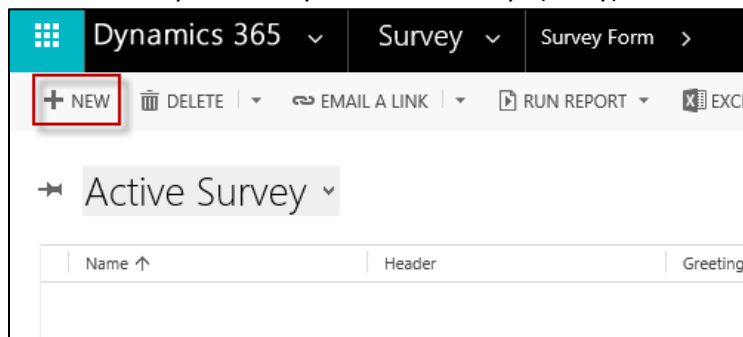
- Click on +NEW to create a new survey.

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SURVEY FORM : INFORMATION			
MTC Product Survey ⋮≡			
▲General			
Name *	**MTC Product Survey**		
Header *	**Take MTC Product Survey**		
Greeting *	**Hello**		
Header Image	**MTC Logo.png**	Footer Image	**MTC Logo.png**
Survey Link Name *	**Product Survey**		
Survey Completed	**Thanks for filling out the survey.**		
Survey Taken	**Sorry! You have already taken this survey.**		
WebForm Heading	--	Submit Button Text	--
CSS and Script			
CSS Font	--	Script	--

- Fill up the fields in survey form as explained below.

  o **Name** – Name of the survey you want to create.
  o **Header** – This is the text that will go in the subject line of your email.
  o **Greeting** – This is the greeting message that appears in your email body.
  o **Header Image** – Image that appears at the top of your survey.
  o **Footer Image** – Image that appears at the bottom of your survey.
  o **Survey Completed** – Provide text here that should appear once the survey is completed by the user (e.g., Thanks for providing the feedback).
  o **Survey Taken** – Provide text here that should appear if the user is trying to take survey more than once (e.g., Sorry. This survey has already been taken by you).

- Save the survey form. The survey form will be renamed instantaneously with the Name that you have just given.

Survey Questions & Answers

- Next, you will have to prepare Survey Questions and Answers.
- For creating a new survey question click on "+" button.

- Survey Question form will open.

- Fill up the fields as explained below.
  - **Existing Question** – If it is checked "Yes" then already present question template can be selected. If "No" then a new question has to be created.
  - **Survey** – The Survey Name will be auto-populated.
  - **Order** – It refers to the hierarchy of question that appears on the final survey form.
  - **Question Text** – It is the survey question that you need to enter.
  - **Question Type** – It can be Radio Button, Rating, Dropdown, Text, Multiple Text, and Checkbox.
  - **Required** – If selected "Yes" then it becomes a mandatory question. If selected "No" then it becomes an optional question.
- After filling the above mentioned fields, click on Save. The form gets saved and unlocks the Survey Answers part.
- Click on +NEW to create Survey Answers.

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- Survey answer form opens up.

- In here, you need to fill the fields as explained below.

  - **Name** – The survey answer has to be entered here.
  - **Survey Question** – The survey question for which the survey answer must be created should be selected here.
  - **Owner** – It refers to the person who created the survey.
  - **Question** – If in the Survey Question, Existing Question is selected as "Yes" then the question template appears here.

- Finally, save the changes.
- Likewise, all the survey answers have to be created based on the question type and the no. of options to be provided for each question.

- All the responses to this survey question can be seen graphically in the Survey Question Responses section.

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SurveyQuestion Responses

Responses ⌄

Similarly, complete the survey form by preparing all relevant questions and answers as aforementioned.

Survey Questions

Order ↑	Question	Type	Survey	Required
1	How was your overall product experience with MTC?	Radio Button	MTC Product Survey	No
2	How likely would you recommend MTC products to ot...	Radio Button	MTC Product Survey	No
3	Will you show interest to engage with us in future?	Radio Button	MTC Product Survey	No
4	Please provide your feedback below.	Multiple Text	MTC Product Survey	No

Survey Publish & Preview

- Once the survey form is completed, click on more commands (…) button from ribbon and from the dropdown click on **Survey Publish**.
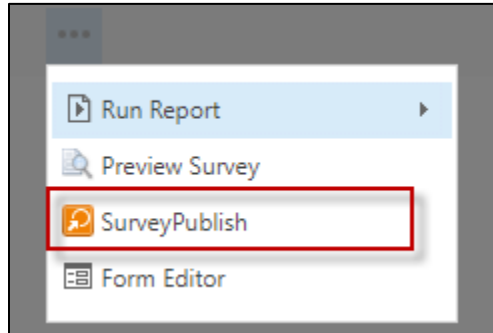
- You will receive the below message. Click on OK.

- If you would like to preview the survey, click on more commands (…) button from ribbon and from the dropdown click on Preview Survey.
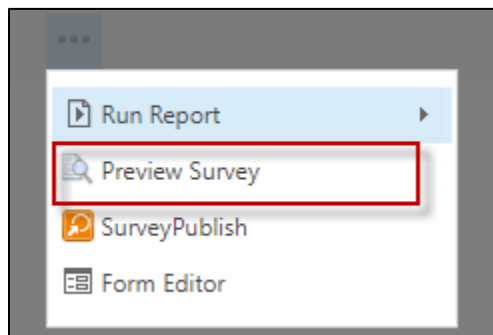
- Then you can see the survey as shown below.

- The MTC logo on the header and footer is displayed because while creating the survey form both header image and footer image was uploaded.

Note: Every survey form created must be published first; then only you will be able to view and send survey.

Sending Survey to Contacts

- In order to send survey to any contact in your CRM, simply select the contact record from the view and click on more command (…) button. From the dropdown click on Send Survey.

- A Lookup Record window pops up. Select the survey that you have created and click on **Add** button.

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Look Up Record
Enter your search criteria.

Look for	Survey Form ▼	☐ Show Only My Records
Look in	Survey Lookup View ▼	
Search		🔍

✓	Name ↑	Header	⟳
✓	MTC Product Survey	Take MTC Product Survey	

1 - 1 of 1 (1 selected) |◄ ◄ Page 1 ►

New   **Add**   Cancel   Remove Value
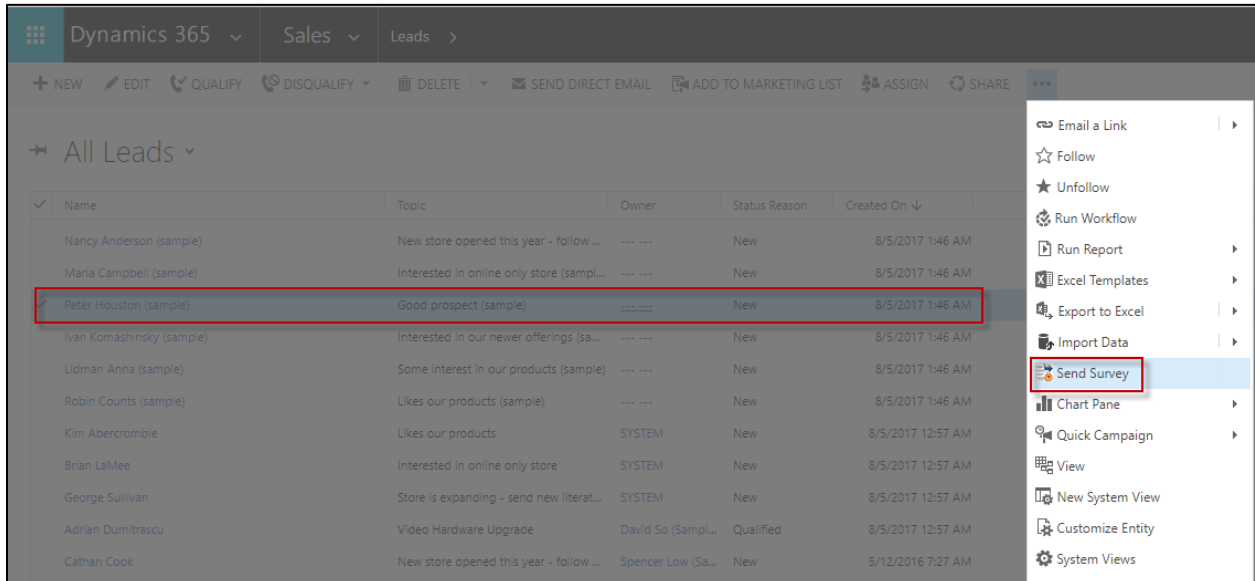
- Survey will be sent to that particular contact.

mtccrm18.crm8.dynamics.com says: ✕

Survey will be sent to selected records(if recipients are allowed to receive emails).

OK

Sending Survey to Leads

- In order to send survey to any lead in your CRM, simply select the lead record from the view and click on more command (…) button. From the dropdown click on Send Survey.

- A Lookup Record window pops up. Select the survey that you have created and click on **Add** button.

- Survey will be sent to that particular lead.

Note: For the survey to be successfully delivered, make sure your email router is configured with your CRM.