

# User Guide



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## Product Overview

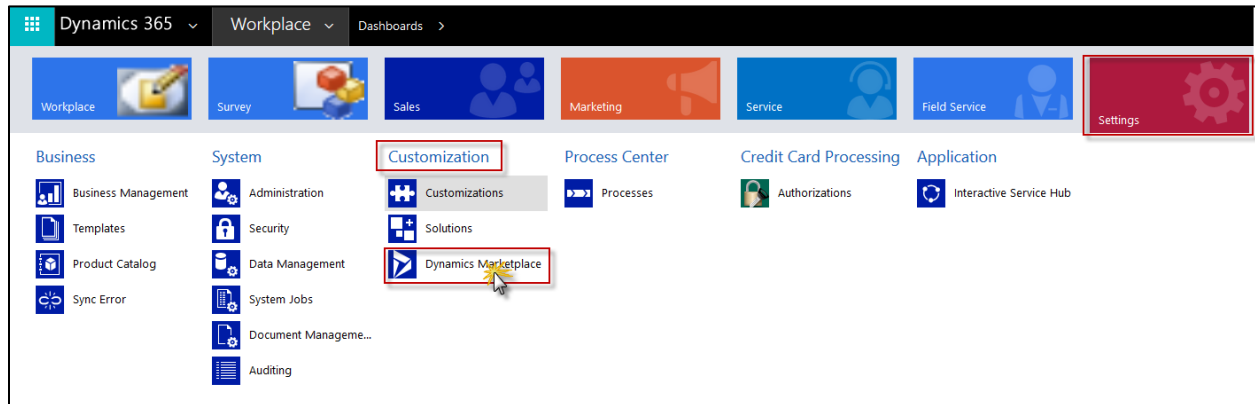
Customer Satisfaction Survey is a Microsoft Dynamics 365/CRM add-on solution that allows you to create surveys on your own from within CRM and reach out to your target audience for tracking their feedback. Responses/feedback are tracked back graphically into your CRM for quick analysis.

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

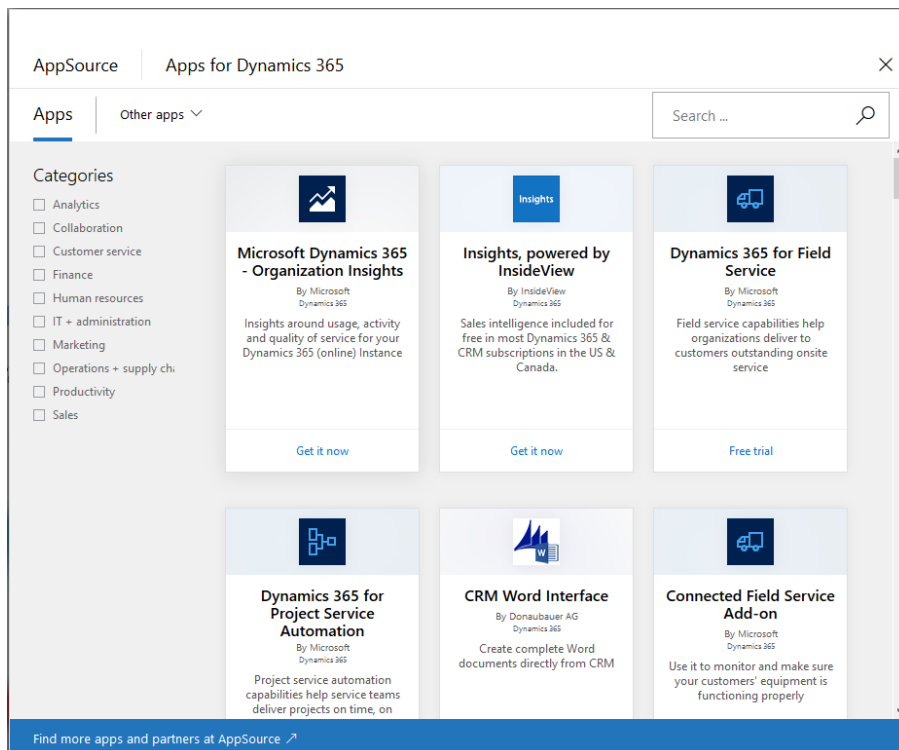
## How to Install and Activate Customer Satisfaction Survey Solution?

To install MTC's Customer Satisfaction Survey solution from Microsoft AppSource on your D365 instance, please follow the below steps.

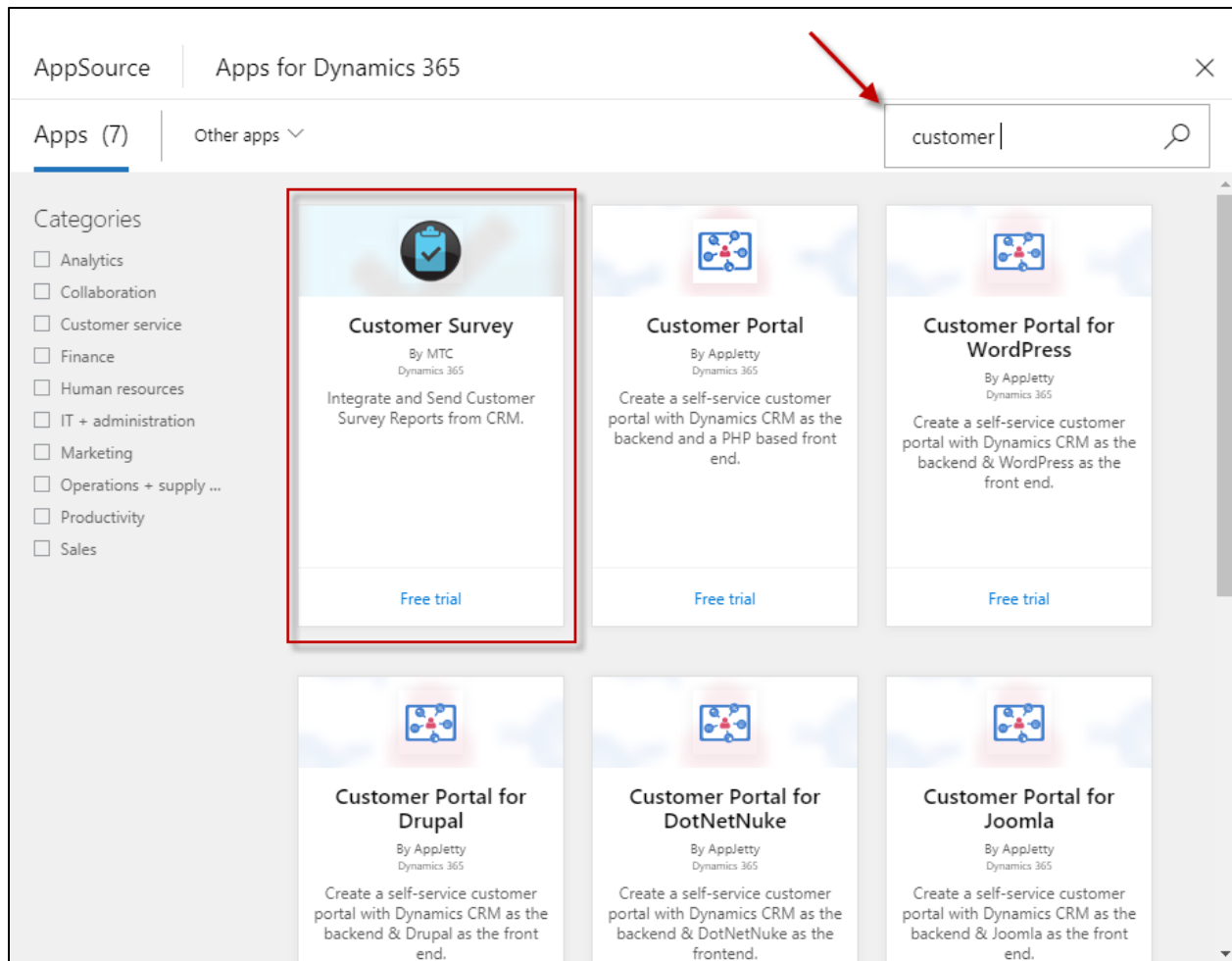
1. From your D365 instance, go to **Settings** and click on **Dynamics Marketplace** under **Customization**.



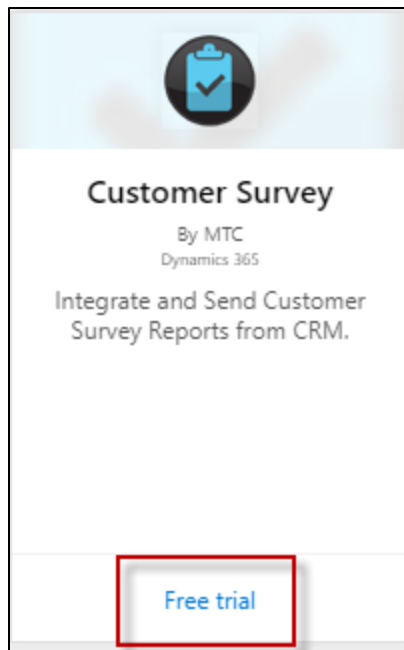
2. Apps for Dynamics 365 window box pops up as shown below.



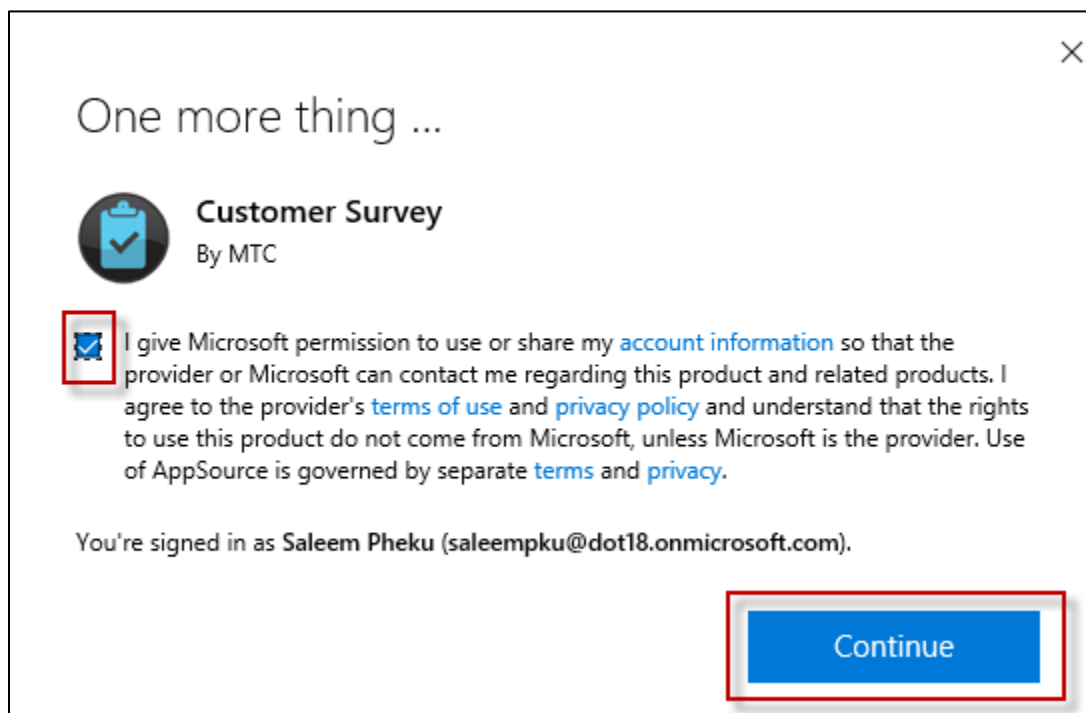
3. Enter MTC's Customer Satisfaction Survey product name in the search box and click on the SEARCH icon.




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.



MTC



Customer Survey

Customer polling to identify their level of satisfaction with an existing product, and to discover their express and hidden needs and expectations for new or proposed product(s). MTC's Survey integrates easily with Microsoft Dynamics CRM. This lets you maximize workplace efficiency and ensure accuracy of your customer data, helps you to bridge a critical gap in CRM by adding customer satisfaction to your list to Microsoft Dynamics CRM. This will allow for more proactive customer service, speedy response rates and you never leave your CRM!

How does it benefit an Organization?

- Choose from many different question types, including: check box, text box, radio

Publisher: MTC

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: MTC (orge03d5402)

☒ Agree to Microsoft's [Legal Terms and Privacy Statement](#)
  
☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

Agree

Cancel

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

All Solutions ▾

New
Delete
Import
Export
Clone a Patch
Clone Solution
Apply Solution Upgrade
Import Translations
Export Translations
Publish All Customizations

Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
CalendarUIPro	Calendar Pro	365.062017...	8/15/2017	Managed	Management Technology Consulting	It Displays Records in The Calendar Format And We Have...
CoffeeSender	CoffeeSender	20152016.0...	8/15/2017	Managed	Publisher for CoffeeSender	You can use Microsoft Dynamics CRM to Send Coffees .
CrmSurvey	Crm Survey	20152016.0...	8/15/2017	Managed	Management Technology Consultanc...	When a customer contacts your customer service team, a...
CRMStarterPack	CRM Starter Pack	2016.06201...	8/15/2017	Managed	Management Technology Consulting	

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 - [click here](#) and follow the above process listed from step 5.

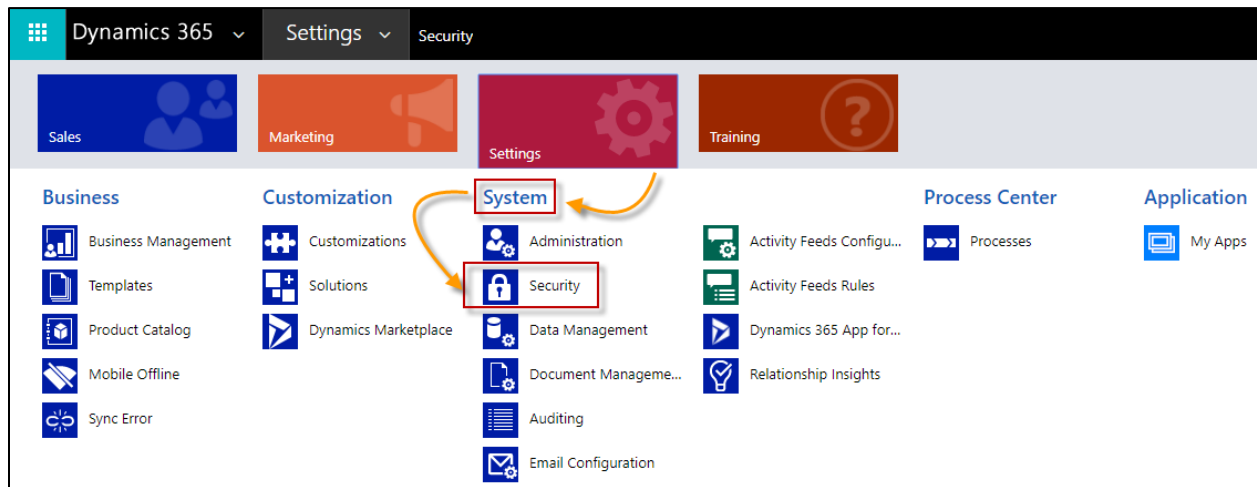
## Security Roles in Customer Satisfaction Survey Solution

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.

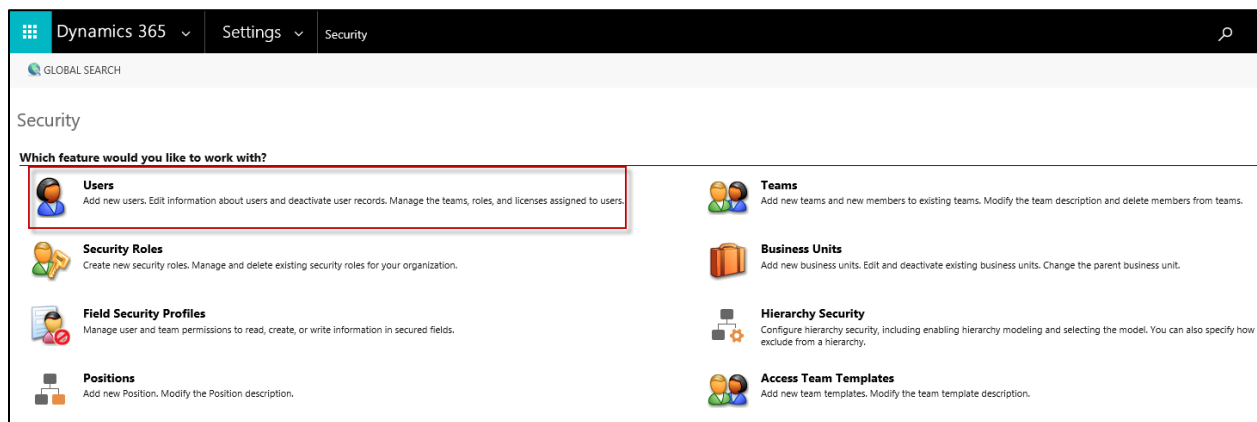
### How to assign Security Roles for Customer Satisfaction Survey Solution in D365?

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.



Dynamics 365 Settings Security

NEW PROMOTE TO ADMIN EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE

Enabled Users

Full Name	Site	Business Unit	Title	Position	Main Phone
mohit marothia		mtccrm18			1234567891
Raghav Chary		mtccrm18			
Rohit Varma		mtccrm18			

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

Dynamics 365 Settings Security

NEW EDIT APPROVE EMAIL REJECT EMAIL PROMOTE TO ADMIN **MANAGE ROLES** CHANGE BUSINESS UNIT CHANGE MANAGER

Enabled Users

Full Name	Site	Business Unit	Title	Position	Main Phone
mohit marothia		mtccrm18			1234567891
Raghav Chary		mtccrm18			
Rohit Varma		mtccrm18			

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

Manage User Roles

What roles would you like to apply to the 1 User you have selected?

Role Name	Business Unit
<input type="checkbox"/> Schedule Manager	mtccrm18
<input type="checkbox"/> Scheduler	mtccrm18
<input checked="" type="checkbox"/> SurveySecurityRole	mtccrm18
<input type="checkbox"/> System Administrator	mtccrm18
<input type="checkbox"/> System Customizer	mtccrm18

OK Cancel

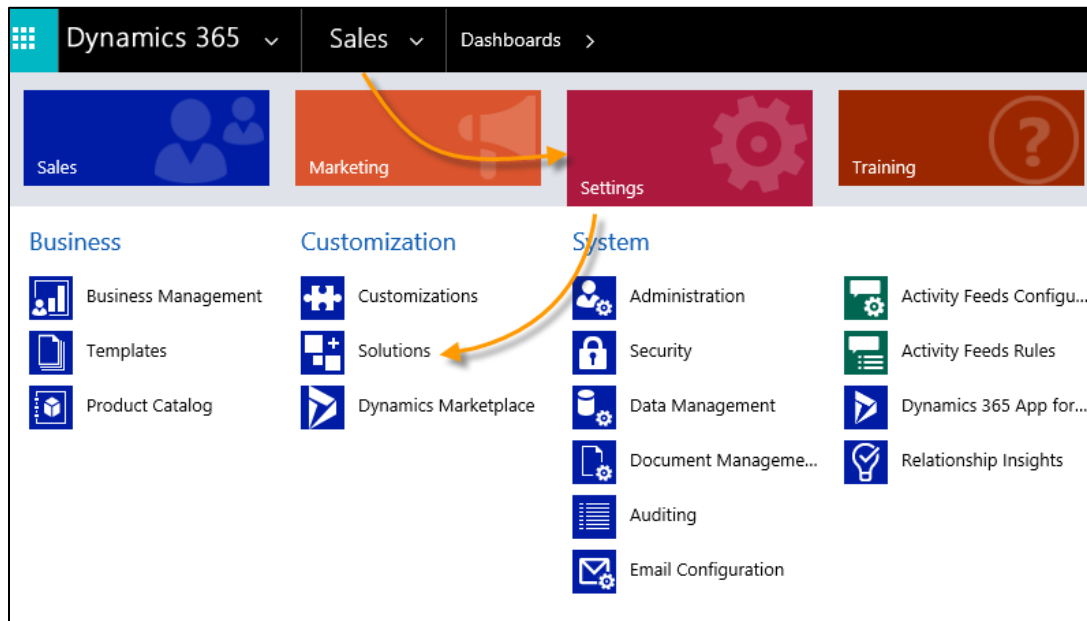
6. Select the **Survey Security Role** and **MTC License** from it and click on OK.

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.

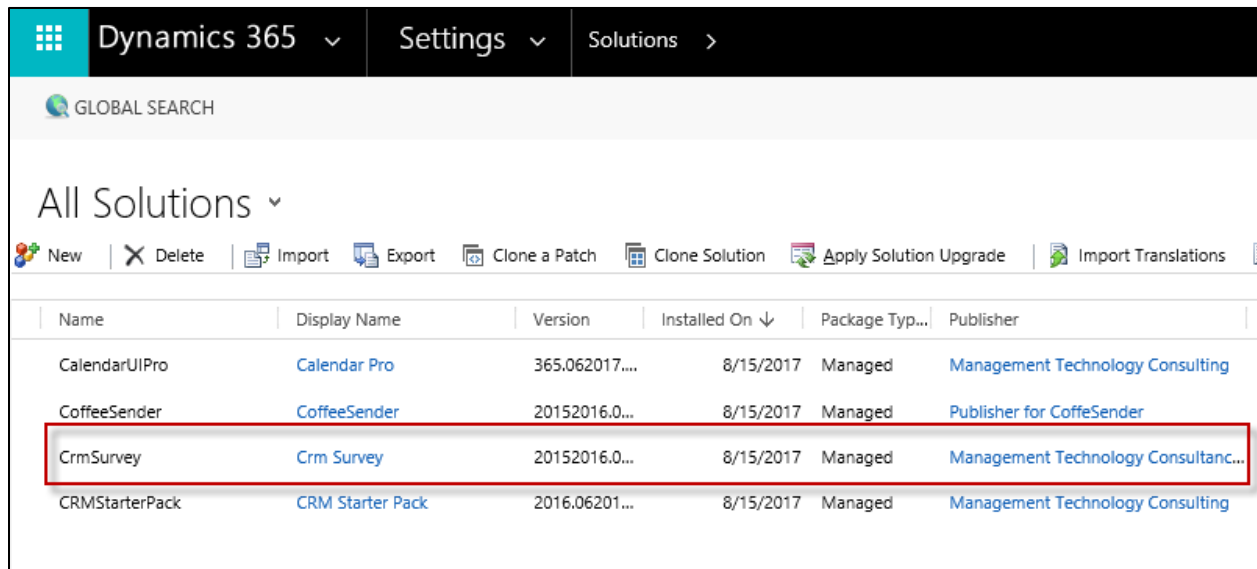
## Configuration Settings in Customer Satisfaction Survey

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.



File Close Actions

Solution: Crm Survey

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow cust from another unmanaged solution.

Solution Crm Survey

Information Configuration Components Entities Option Sets Client Extensions

Verifying Change Password Upload Images

You Can Change The URL:

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.

CRM Settings

☐ Onpremise ☒ Office 365 ☐ IFDS

CRM Uri

User Name

Password

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.



File(s) uploaded successfully

[Click here to upload more images](#)



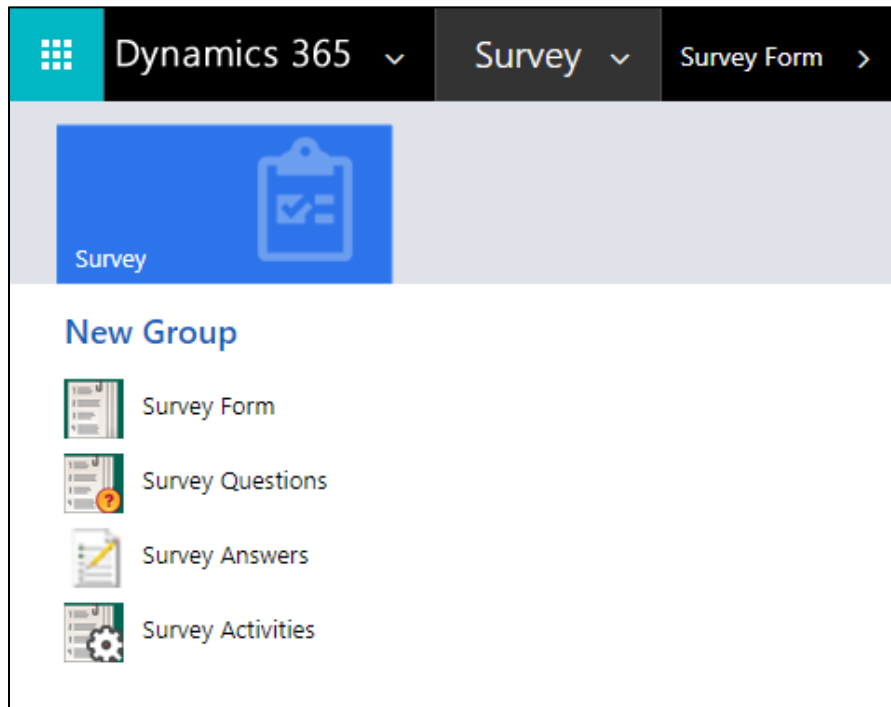
MTC Logo.png

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

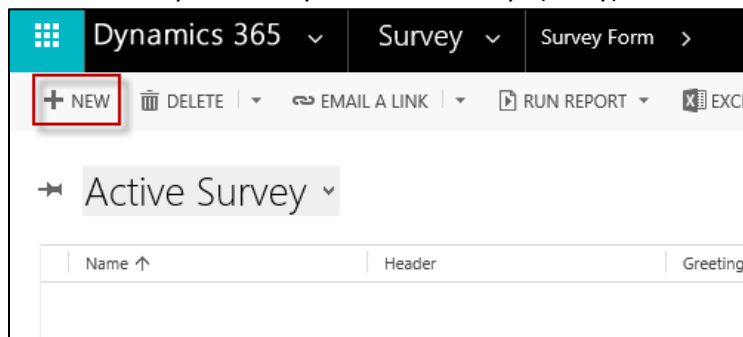
## Customer Satisfaction Survey Functionality

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.



- Survey Form** – This form will help you to create your desired survey for targeted customers.
  - Survey Questions** – All the survey questions that you prepare for survey forms can be seen here.
  - Survey Answers** – All the survey answers that you provide for respective survey questions can be seen here.
  - 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.



SURVEY FORM : INFORMATION

## MTC Product Survey

**General**

Name *	MTC Product Survey		
Header *	Take MTC Product Survey		
Greeting *	Hello		
Header Image	<a href="#">MTC Logo.png</a>	Footer Image	<a href="#">MTC Logo.png</a>
Survey Link Name *	Product Survey		
Survey Completed	Thanks for filling out the survey.		
Survey Taken	Sorry! You have already taken this survey.		
WebForm Heading	<input type="text" value="--"/>		Submit Button Text --
<b>CSS and Script</b>			
CSS Font	<input type="text" value="--"/>		Script <input type="text" value="--"/>

- Fill up the fields in survey form as explained below.
  - **Name** – Name of the survey you want to create.
  - **Header** – This is the text that will go in the subject line of your email.
  - **Greeting** – This is the greeting message that appears in your email body.
  - **Header Image** – Image that appears at the top of your survey.
  - **Footer Image** – Image that appears at the bottom of your survey.
  - **Survey Completed** – Provide text here that should appear once the survey is completed by the user (e.g., Thanks for providing the feedback).
  - **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 Questions

Order ↑	Question	Type	Survey	Required
No Survey Questions records found.				

- Survey Question form will open.

SURVEY QUESTIONS : INFORMATION

# How was your overall...

General

Existing Question	No		
Survey *	MTC Product Survey	Order	1
Question Text *	How was your overall product experience with MTC?		
Question Type *	Radio Button	Required *	No

- 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.

Survey Answers


Answer	Survey Question ↑
No Survey Answer records found.	

- Survey answer form opens up.

SURVEY ANSWER : INFORMATION

## New Survey Answer

General

Name\*  Owner\*  mohit marothia

Survey Question [How was your overall product experience with MTC?](#) Question --

- 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.

Survey Answers

Answer	Survey Question ↑
Good	How was your overall product experience with MTC?
Very Good	How was your overall product experience with MTC?
Bad	How was your overall product experience with MTC?
OK	How was your overall product experience with MTC?

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

## SurveyQuestion Responses

 Responses ▾

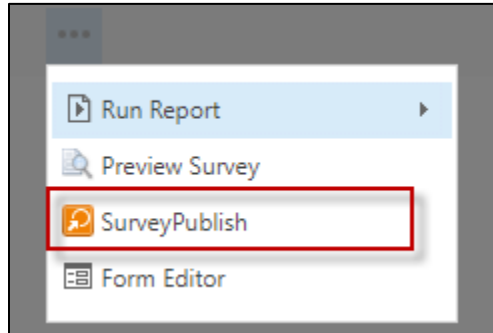
Similarly, complete the survey form by preparing all relevant questions and answers as aforementioned.

## 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

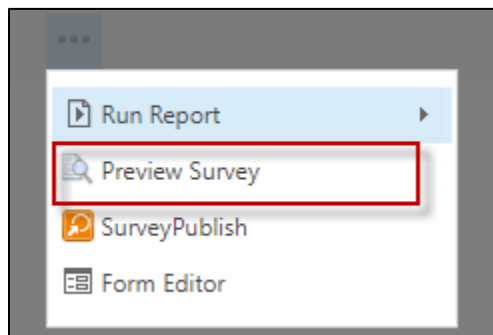
- Once the survey form is completed, click on more commands (...) button from ribbon and from the dropdown click on **Survey Publish**.



- 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.



### Take MTC Product Survey

1. How was your overall product experience with MTC?

☐ Good ☐ Very Good ☐ Bad ☐ OK

2. How likely would you recommend MTC products to other clients?

☐ Very Likely ☐ Less Likely ☐ Sometimes ☐ Never

3. Will you show interest to engage with us in future?

☐ Yes ☐ No

4. Please provide your feedback below.

Submit

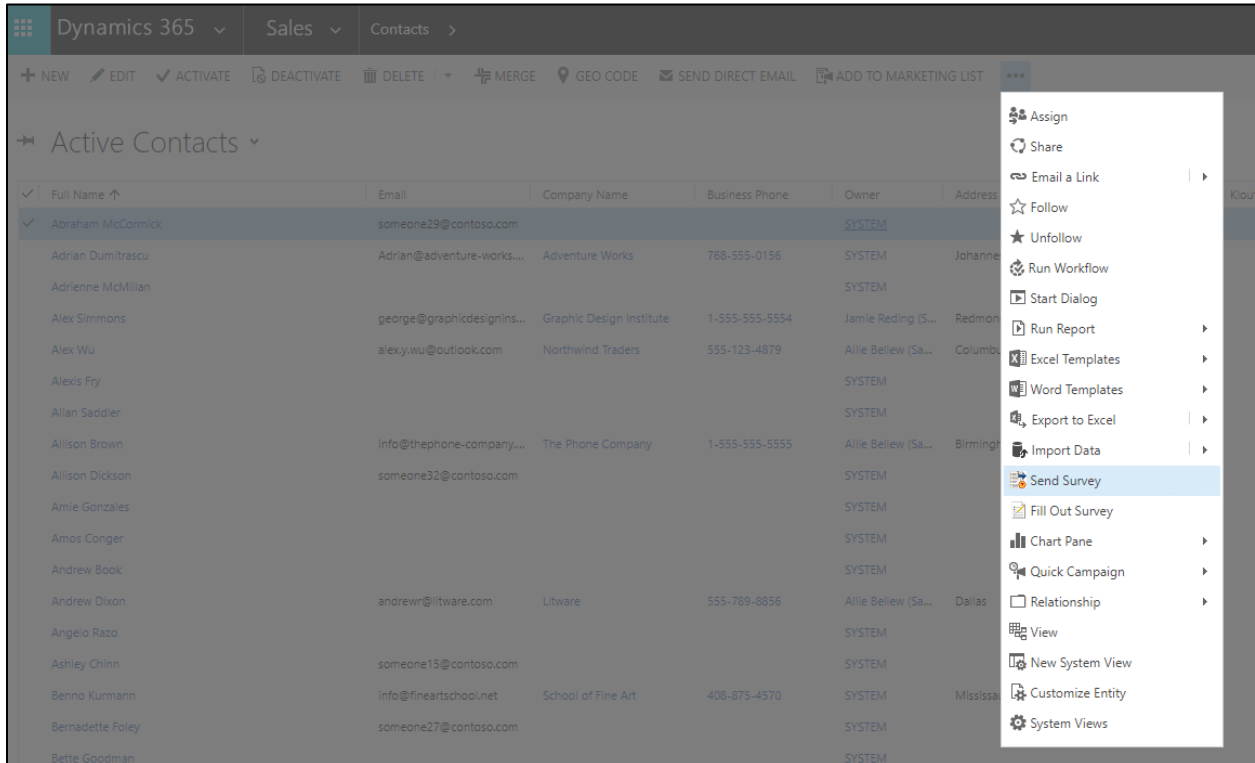


- The MTC logo on the header and footer is displayed because while creating the survey form both header image and footer image was uploaded.

*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.



The screenshot shows the Microsoft Dynamics 365 Sales interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Contacts'. Below the navigation bar, there are several action buttons: '+ NEW', 'EDIT', 'ACTIVATE', 'DEACTIVATE', 'DELETE', 'MERGE', 'GEO CODE', 'SEND DIRECT EMAIL', and 'ADD TO MARKETING LIST'. The main area displays a table of 'Active Contacts'. The first contact, 'Abraham McCormick', is selected. A dropdown menu is open for this contact, showing various actions. The 'Send Survey' option is highlighted in blue.

Full Name	Email	Company Name	Business Phone	Owner	Address
Abraham McCormick	someone29@contoso.com			SYSTEM	
Adrian Dumitrascu	Adrian@adventure-works....	Adventure Works	768-555-0156	SYSTEM	Johanne
Adrienne McMillan				SYSTEM	
Alex Simmons	george@graphicdesignins...	Graphic Design Institute	1-555-555-5554	Jamie Reding (S...	Redmon
Alex Wu	alex.y.wu@outlook.com	Northwind Traders	555-123-4879	Allie Belieu (Sa...	Columb
Alexis Fry				SYSTEM	
Allan Saddler				SYSTEM	
Allison Brown	Info@thephone-company....	The Phone Company	1-555-555-5555	Allie Belieu (Sa...	Birmingt
Allison Dickson	someone32@contoso.com			SYSTEM	
Amie Gonzales				SYSTEM	
Amos Conger				SYSTEM	
Andrew Book				SYSTEM	
Andrew Dixon	andrewr@litware.com	Litware	555-789-8856	Allie Belieu (Sa...	Dallas
Angeio Razo				SYSTEM	
Ashley Chinn	someone15@contoso.com			SYSTEM	
Benno Kurmann	info@fineartschool.net	School of Fine Art	408-875-4570	SYSTEM	Mississ
Bernadette Foley	someone27@contoso.com			SYSTEM	
Sette Goodman				SYSTEM	

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



### Look Up Record

Enter your search criteria.

Look for:  ☐ Show Only My Records

Look in:

Search:

Name ↑	Header
✓ MTC Product Survey	Take MTC Product Survey

1 - 1 of 1 (1 selected) Page 1

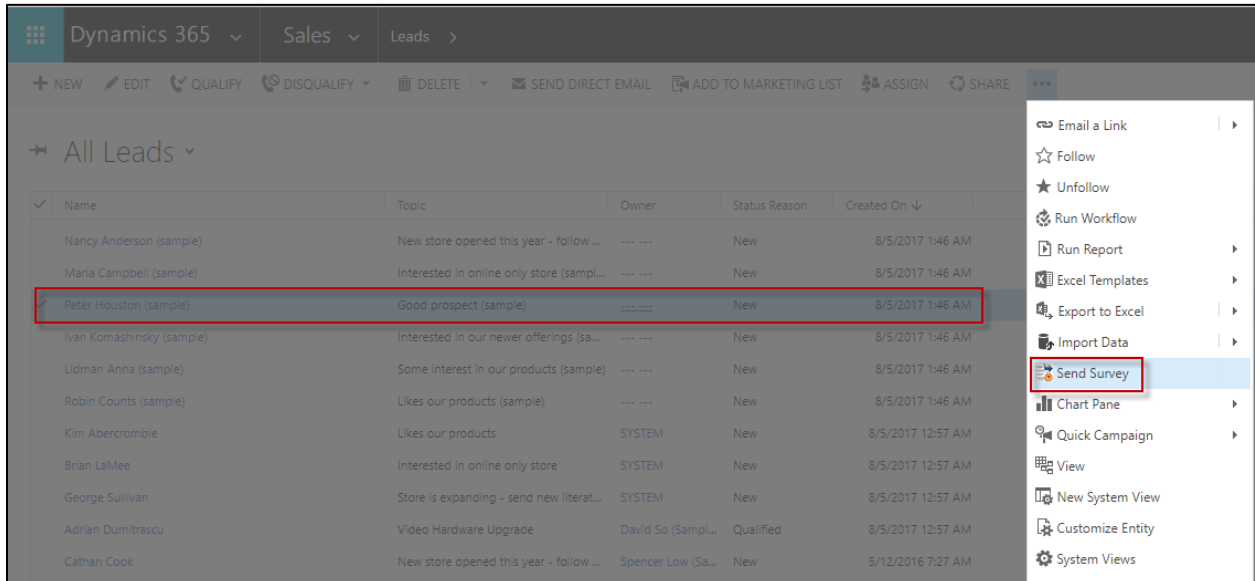
- Survey will be sent to that particular contact.

mtccrm18.crm8.dynamics.com says:

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

## 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.



The screenshot shows the Microsoft Dynamics 365 interface for the Sales Leads view. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Leads'. Below the navigation bar is a ribbon with various actions: NEW, EDIT, QUALIFY, DISQUALIFY, DELETE, SEND DIRECT EMAIL, ADD TO MARKETING LIST, ASSIGN, and SHARE. The main area displays a table of leads under the 'All Leads' view. The table has columns for Name, Topic, Owner, Status Reason, and Created On. One lead, 'Peter Houston (sample)', is selected and highlighted with a red box. A context menu is open for this lead, showing various actions. The 'Send Survey' option is highlighted with a red box.

Name	Topic	Owner	Status Reason	Created On
Nancy Anderson (sample)	New store opened this year - follow ...	---	New	8/5/2017 1:46 AM
Maria Campbell (sample)	Interested in online only store (sampl...	---	New	8/5/2017 1:46 AM
Peter Houston (sample)	Good prospect (sample)	---	New	8/5/2017 1:46 AM
Ivan Komashinsky (sample)	Interested in our newer offerings (sa...	---	New	8/5/2017 1:46 AM
Lidman Anna (sample)	Some interest in our products (sample)	---	New	8/5/2017 1:46 AM
Robin Counts (sample)	Likes our products (sample)	---	New	8/5/2017 1:46 AM
Kim Abercrombie	Likes our products	SYSTEM	New	8/5/2017 12:57 AM
Brian LaMee	Interested in online only store	SYSTEM	New	8/5/2017 12:57 AM
George Sullivan	Store is expanding - send new literat...	SYSTEM	New	8/5/2017 12:57 AM
Adrian Dumitrascu	Video Hardware Upgrade	David So (Sampl...	Qualified	8/5/2017 12:57 AM
Cathan Cook	New store opened this year - follow ...	Spencer Low (Sa...	New	5/12/2016 7:27 AM

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





### Look Up Record

Enter your search criteria.

**Look for**  ☐ **Show Only My Records**

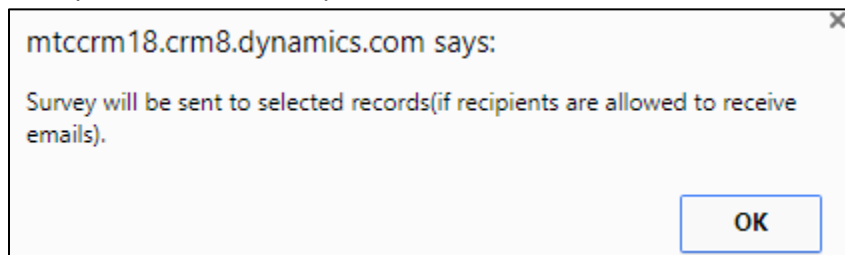
**Look in**

**Search**

Name ↑	Header
✓ MTC Product Survey	Take MTC Product Survey

1 - 1 of 1 (1 selected) Page 1

- 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.*