March 11, 2020

DXC Intelligent Survey

Powerful extended functionality for Dynamics 365

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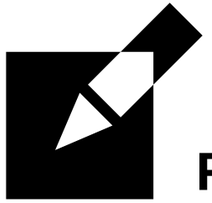
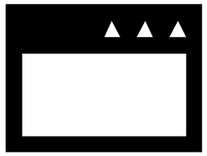
Key Benefits



Reduce Cost

Replace paper-based forms with guided template-driven surveys for a wide variety of business processes, including:

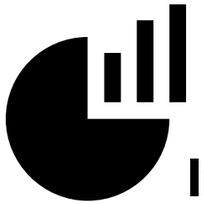
- Risk and Site Assessments
- Inspections
- Call Scripting
- Sales Visits
- Health and Safety Assessments



Quick and Flexible

Complex survey templates can be created by Dynamics 365 users without having to use the configuration tool.

Empower your people in the field with interactive surveys and assessments that they can fill in when offline at the customer site.



Increase Efficiency

Increase customer satisfaction by following a scripted, structured approach for capturing information.

Automatically create a report of the completed survey which is emailed to the customer.

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Key Concepts

Survey Execution

Run surveys directly from Dynamics 365, on a mobile or tablet client, from a Microsoft Portal or Azure Web App.

Survey Templates

Quick and flexible Survey template creation using an intuitive drag and drop designer. Versioning and Auditing provides control.

Allocation Rules

Automatically create Surveys off any entity when new records are created.

Reporting

Generate a HTML5 PDF report or report off a custom entity using Word Mail Merge.

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Survey Execution

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Survey Execution Options

- Field Service Mobile and Tablet App
- Resco Mobile CRM Mobile and Tablet App
- Inside Dynamics 365 Customer Engagement
- Run Inside a Microsoft Portal
- Inside an Azure Web App

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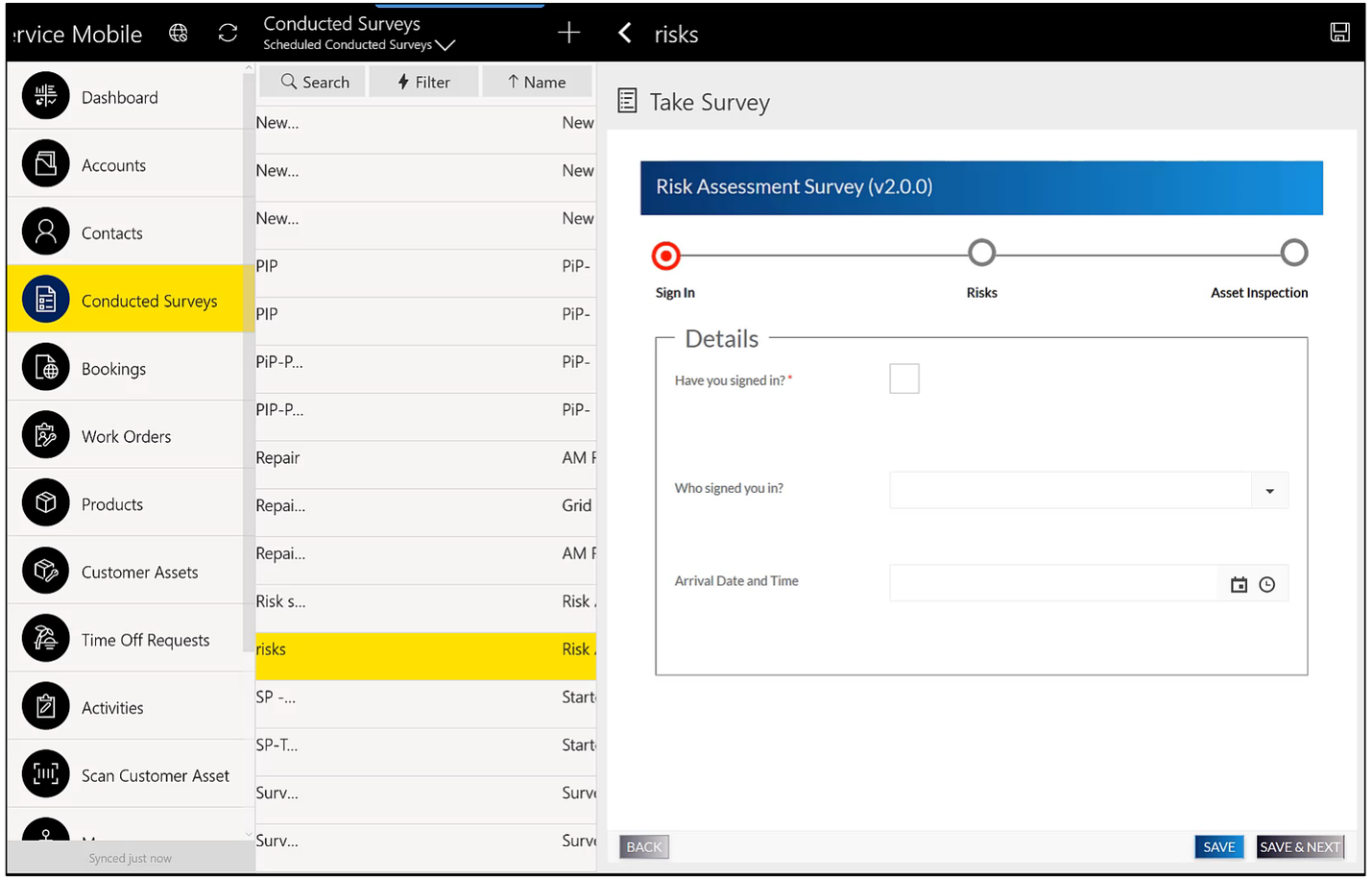
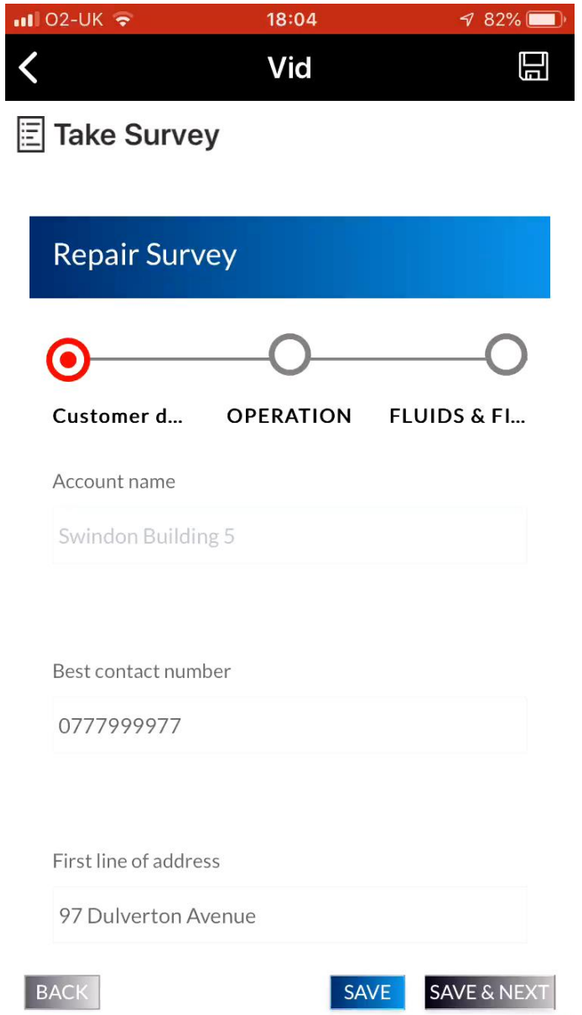
Microsoft Field Service Mobile/Tablet app

Execute Surveys on iOS, Android or Windows Mobile/Tablet devices in Online or Offline Mode.





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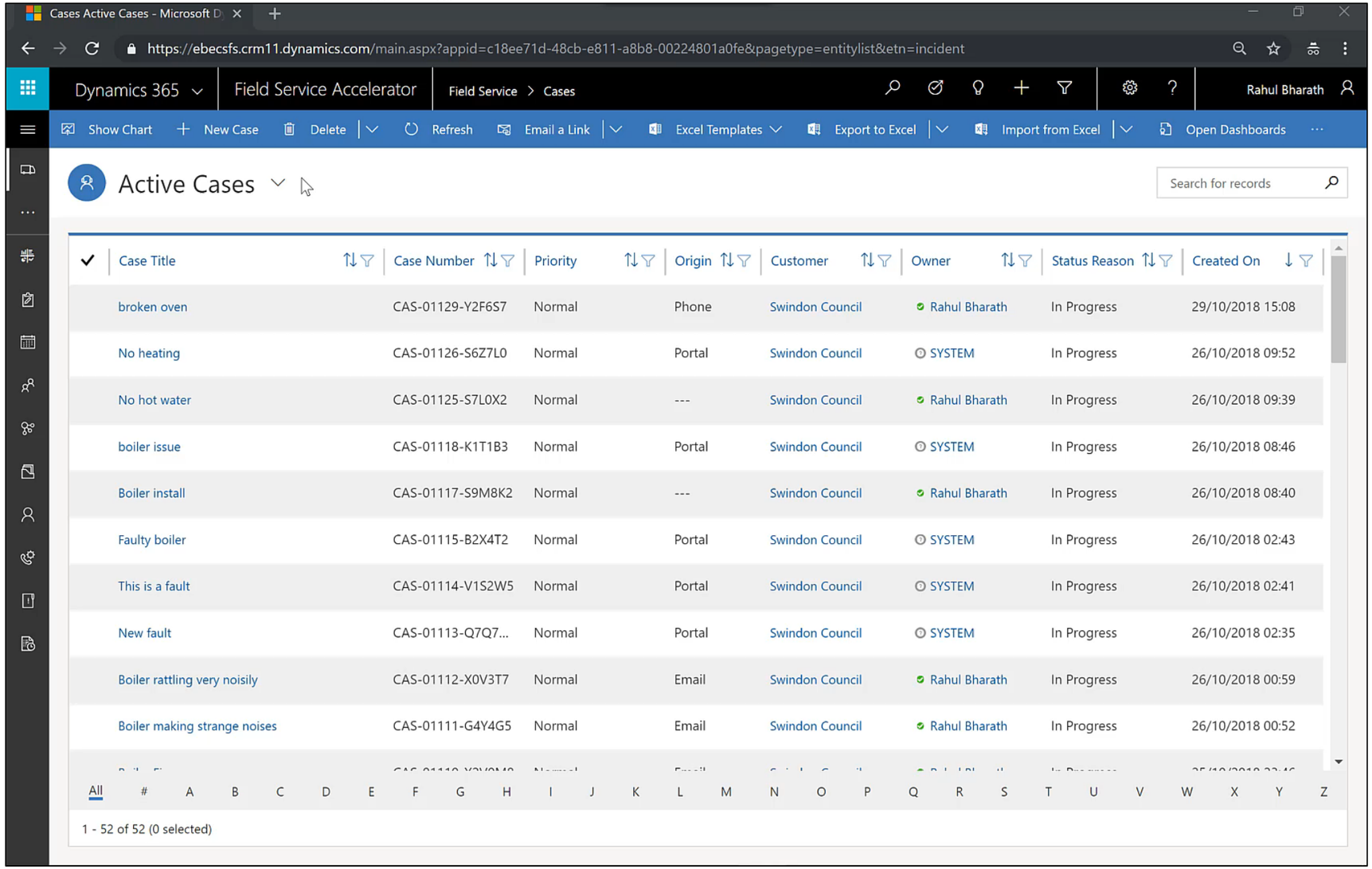
Inside Dynamics 365 Customer Engagement

Flexible Execute Surveys off any D365 entity.

Intuitive Enable all centre users to be guided through a workflow/dialog.

Efficient Streamline processes to drive efficiency.



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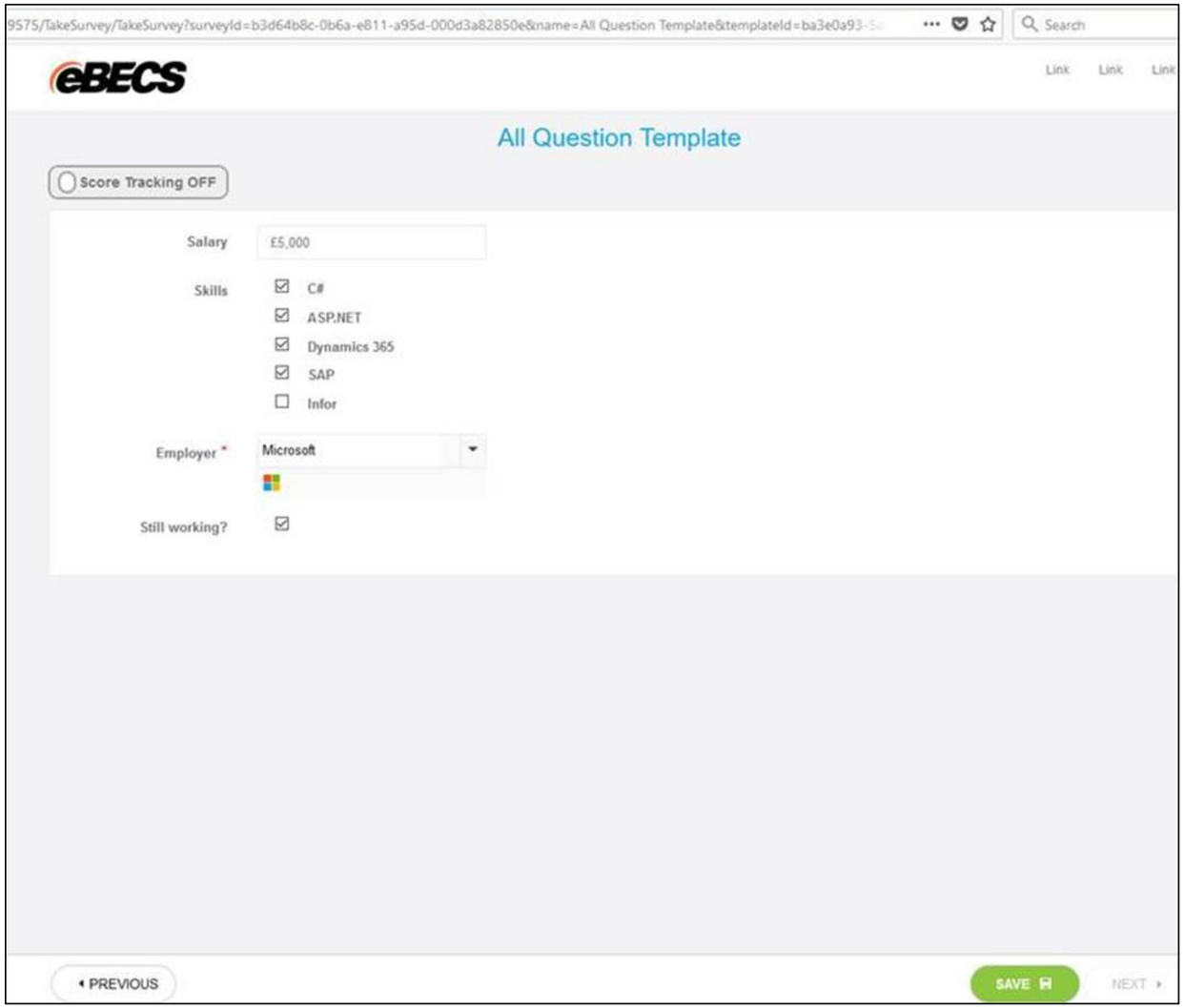
Inside a Microsoft Portal or Standalone in an Azure Web App

External	Enables Customers or external contacts to be guided through a survey template.
Portal	Runs inside a Microsoft Portal, using an Azure Web App.
Azure Web App	Can run standalone within an Azure Web App.



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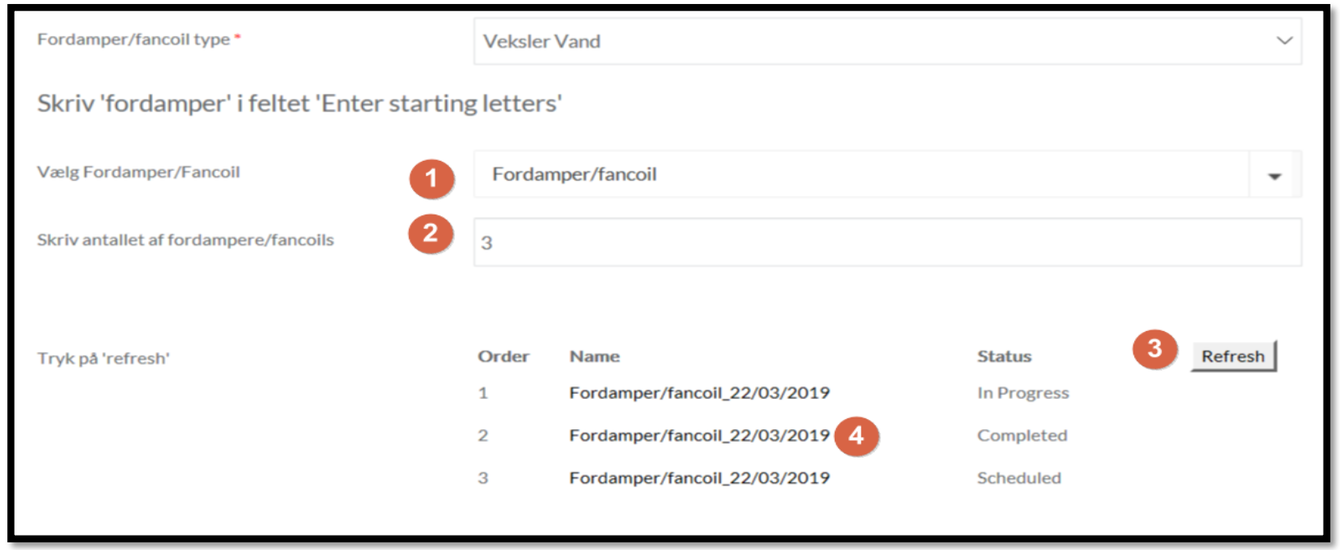
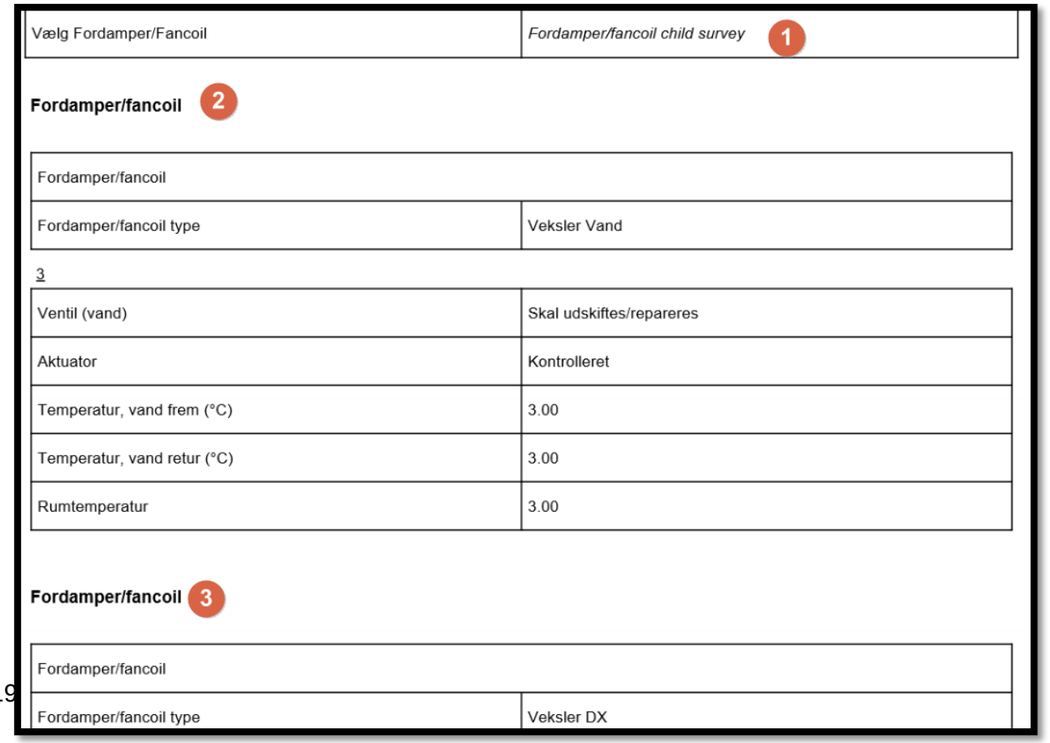
Child Surveys

Efficient	Combine multiple survey templates into one.
Parent/ Child	Creates a Parent and Child relationship between the survey templates.
Streamline	Easily link surveys together to reduce the number of separate surveys.





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Survey Templates

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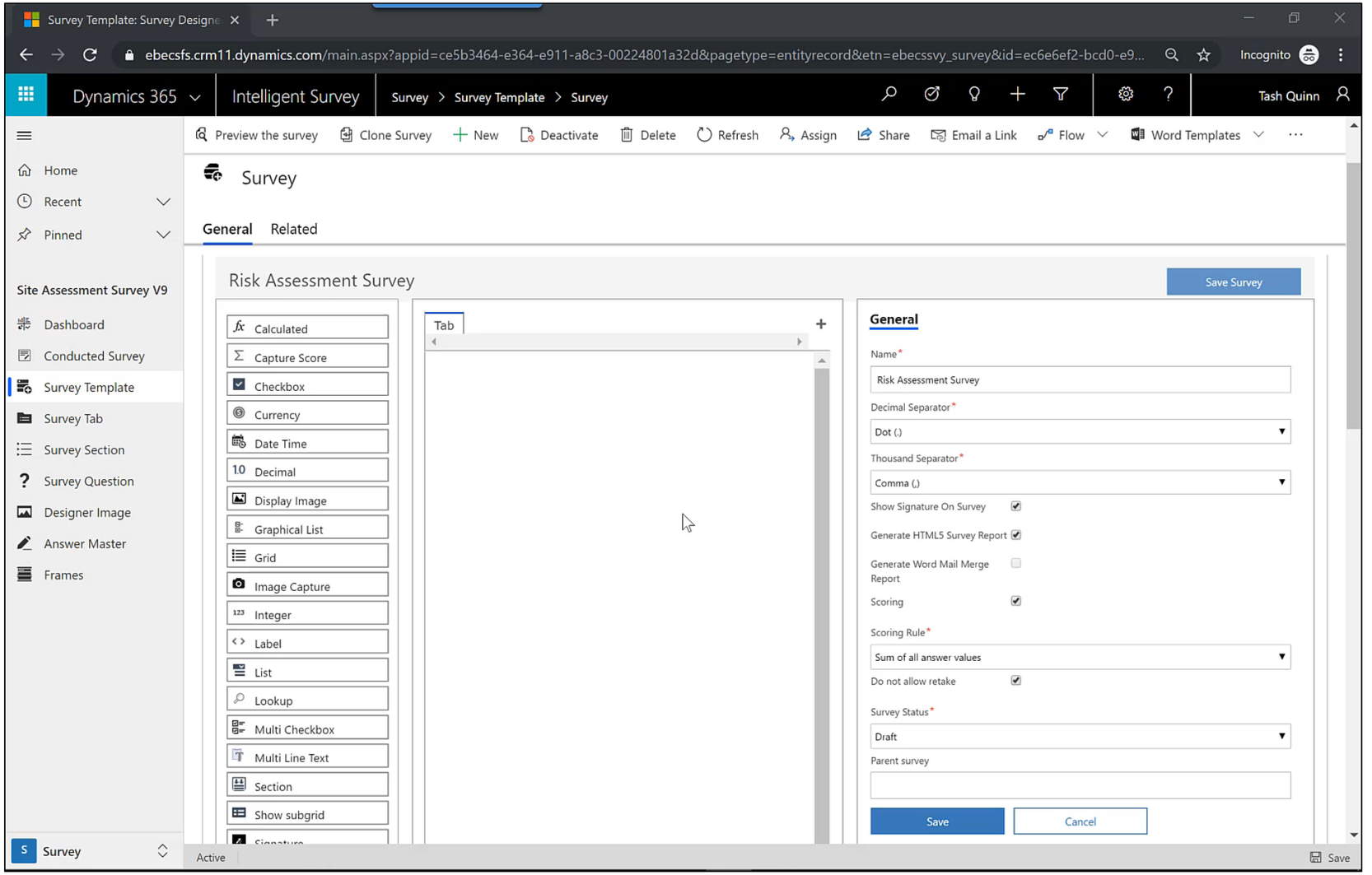
Survey Template

Tabs Create Tabs to define the survey screens.

Sections Multiple Sections can be created per Tab to group Questions.

Questions Multiple question types with configurable scoring and actions.



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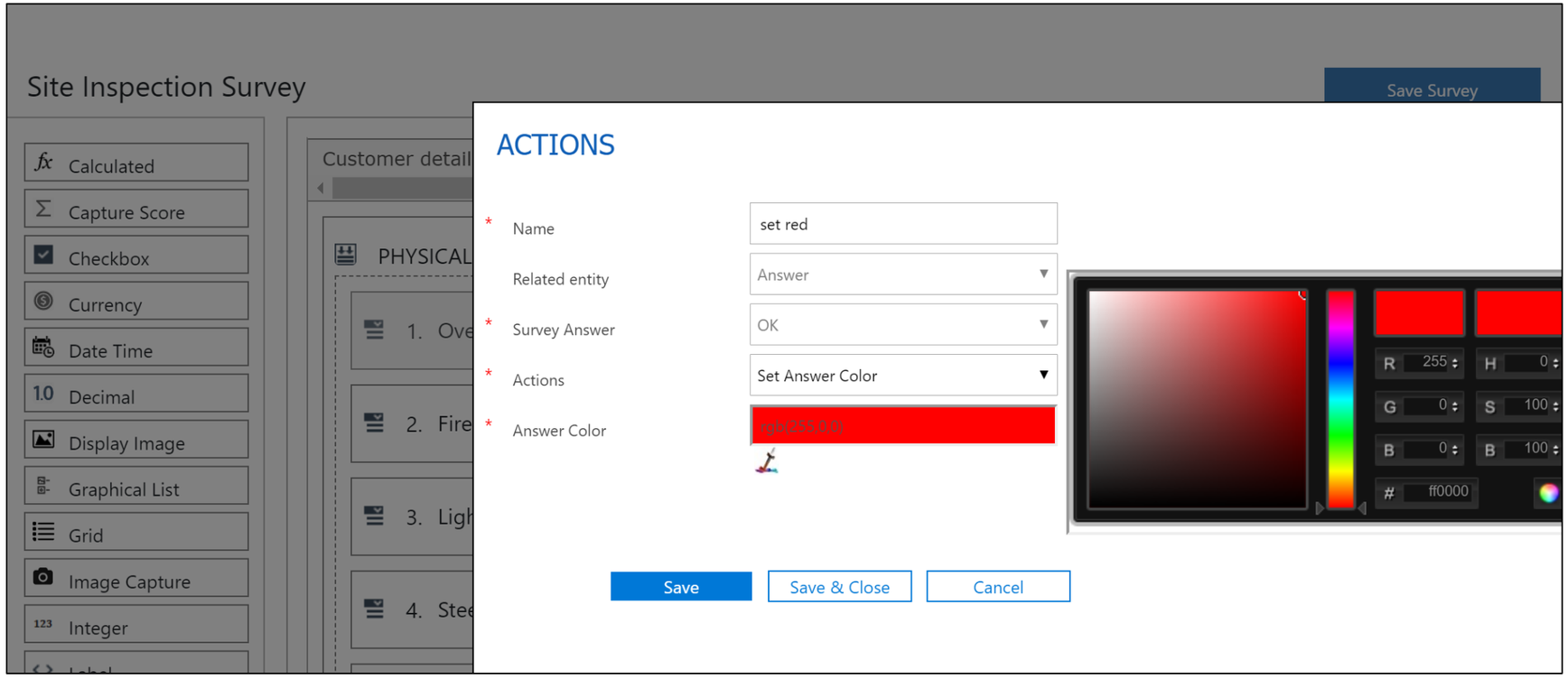
Survey Actions

Dynamic Trigger actions whilst running the survey.

Logic Guide the survey down a process based on the answers to questions.

Flexible Various Action Types that can be leveraged.



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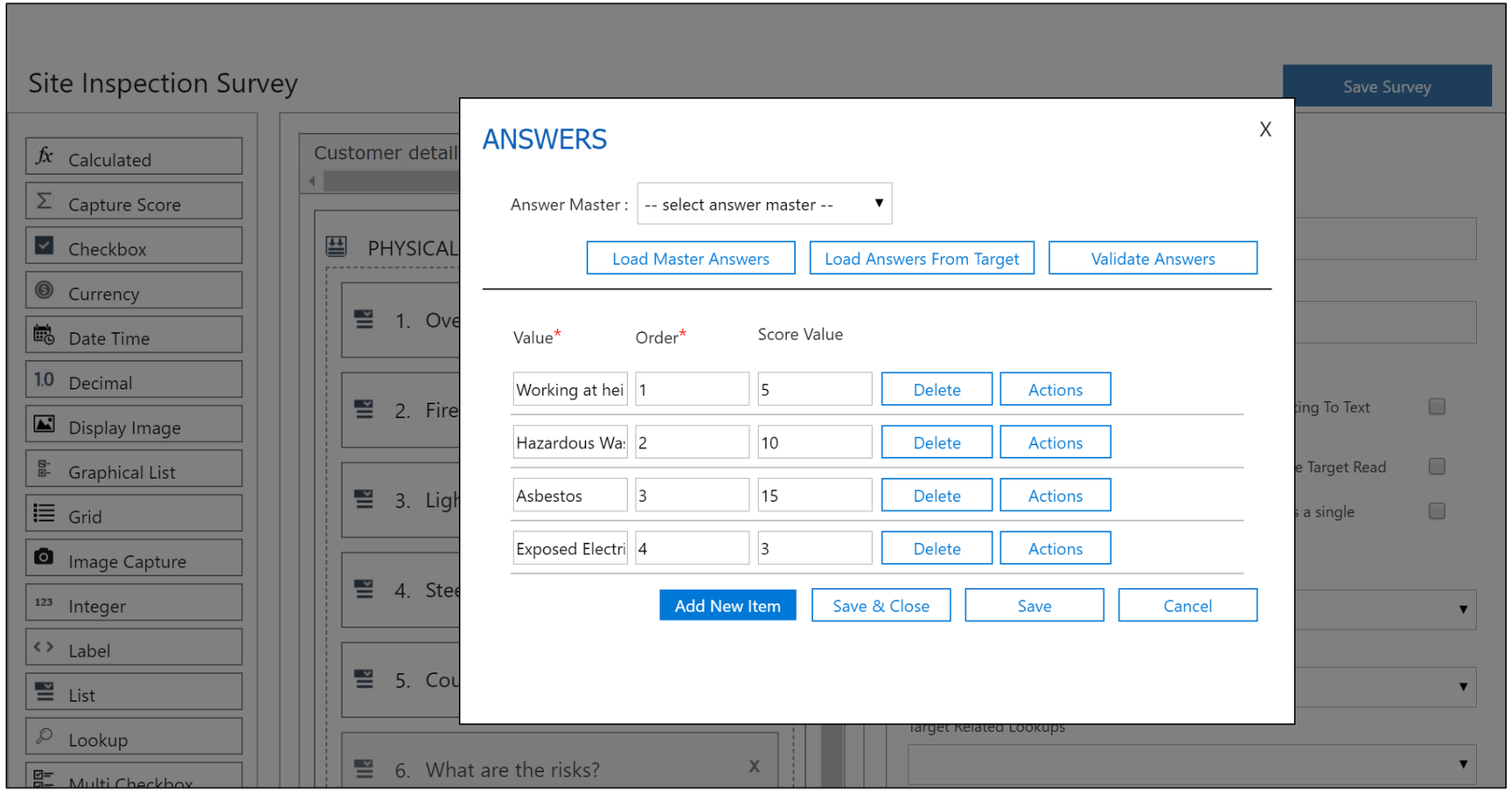
Configurable Scoring

Configurable Create a Score per Answer to a Question.

Weighted Enable all centre users to be guided through a workflow/dialog.

Efficient Streamline processes to drive efficiency.



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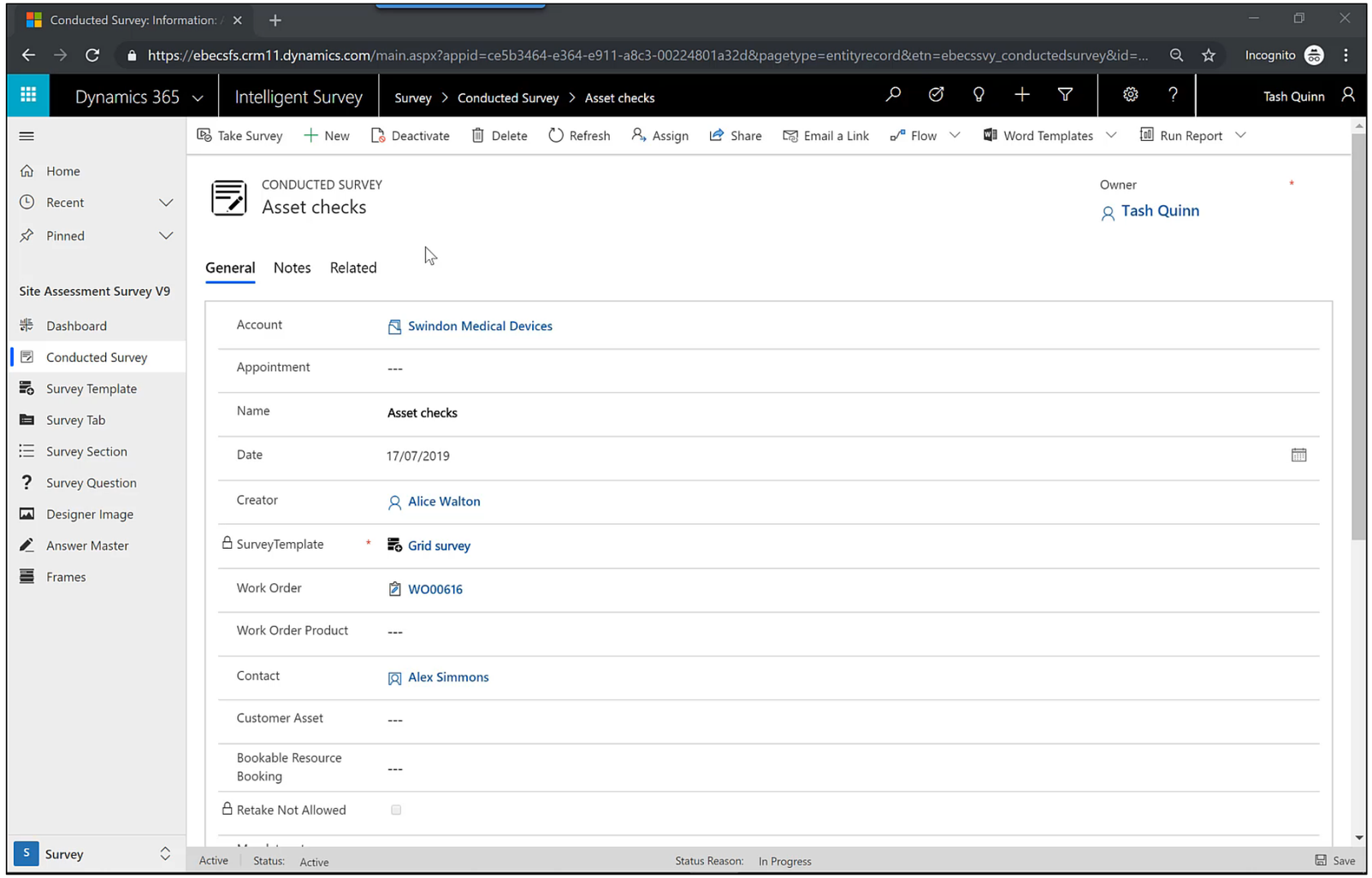
Grids and Repeat Sections

Editable Grids Quickly and easily input data into a grid.

Repeat Section Duplicate sections with questions for easy data input.

Record Creation Automatically create new records off data inputted into the Grid.



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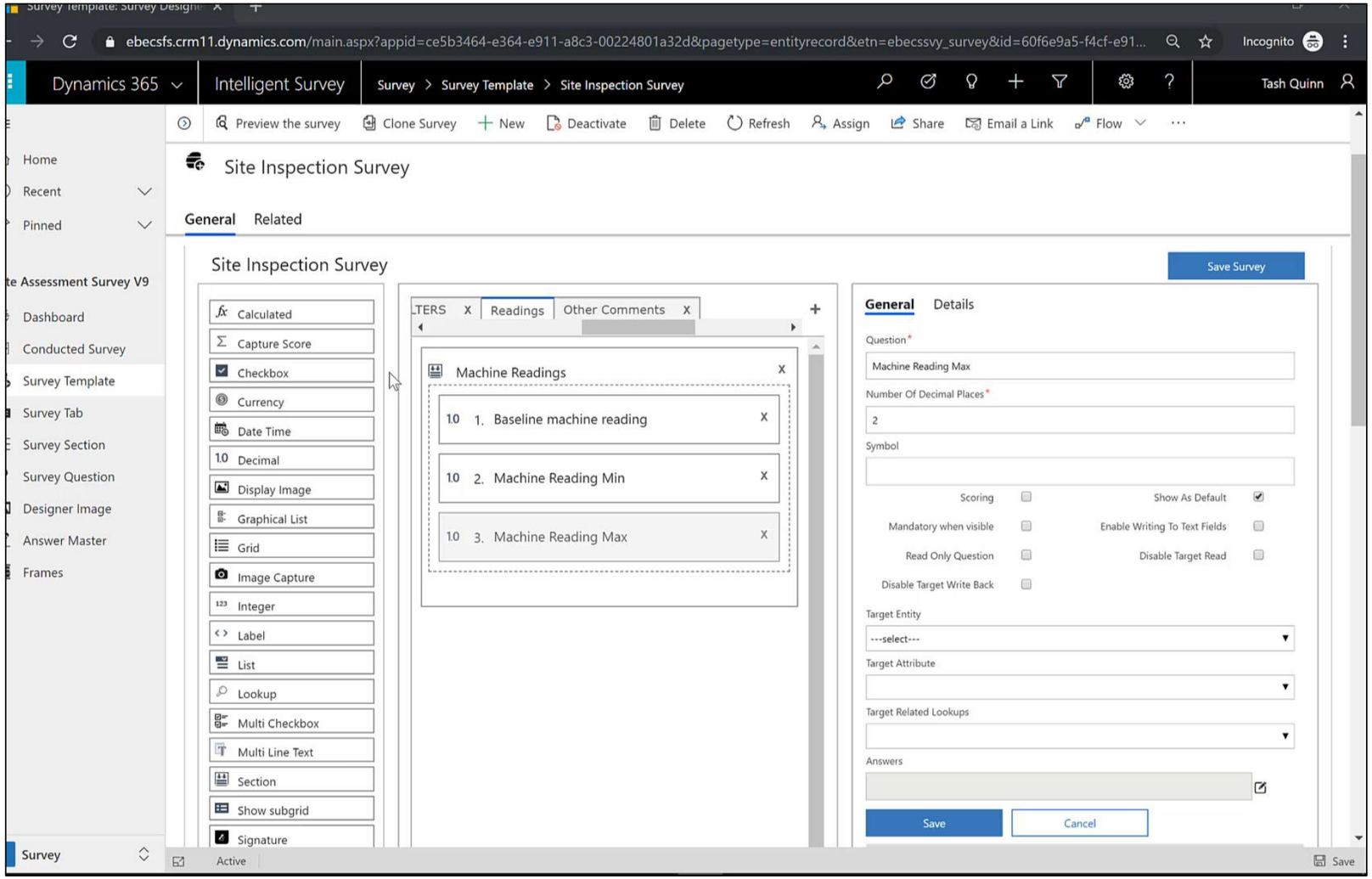
Calculations

Simple — Perform simple calculations between two or more Integer or Decimal fields.

Quick — Calculations are triggered in real-time whilst running the survey.

Easy — Make updates to the calculated formula easily.



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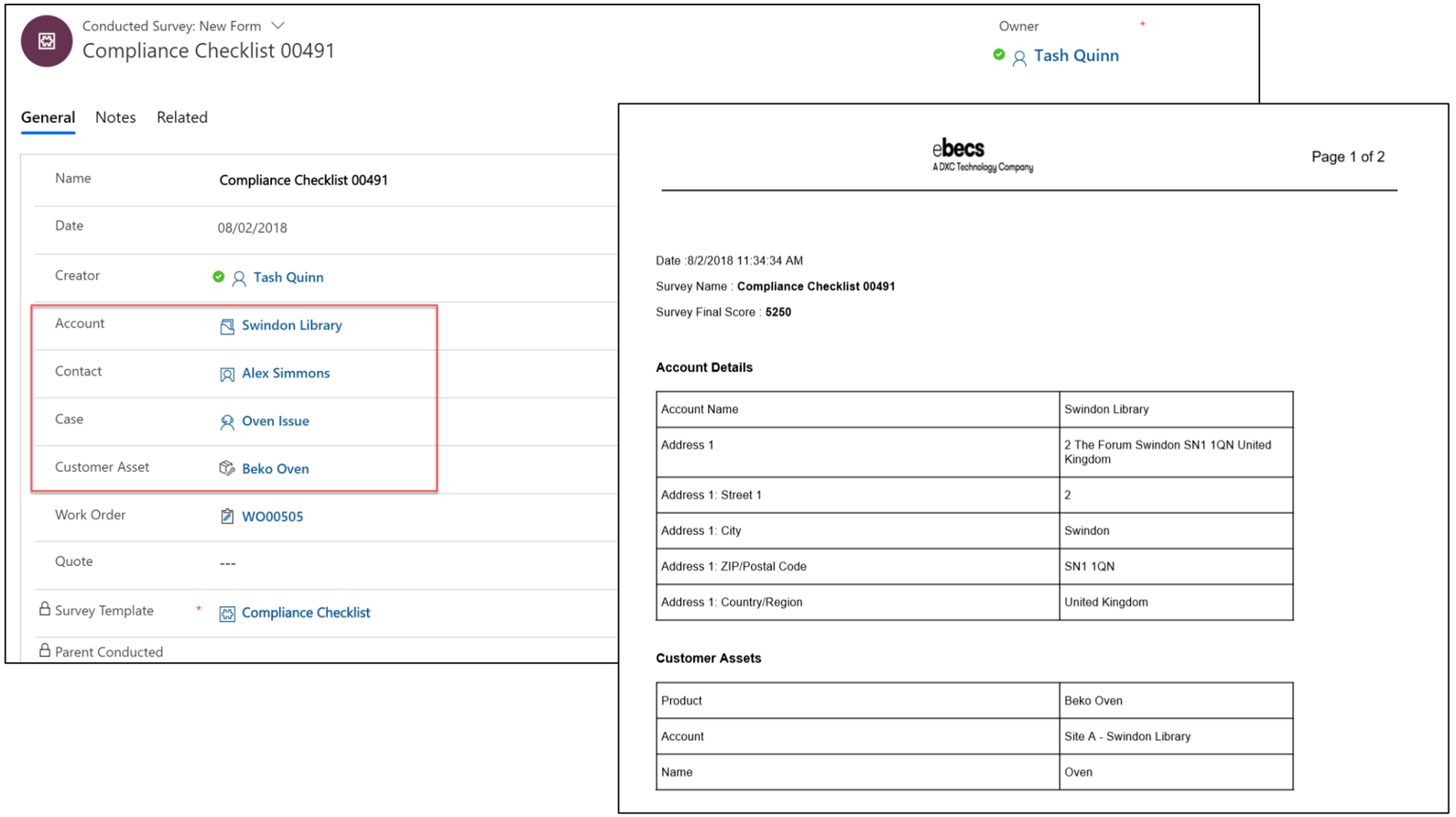
Lookup Data against the Conducted Survey Entity

Create Lookups to other entities in order to:

- Run a Survey from a particular entity in Dynamics 365 CE.
- Write or read data from a particular entity.
- Display data on the cover page of the Report produced.
- enforce Survey Allocation Rules based on an entity or its attributes.



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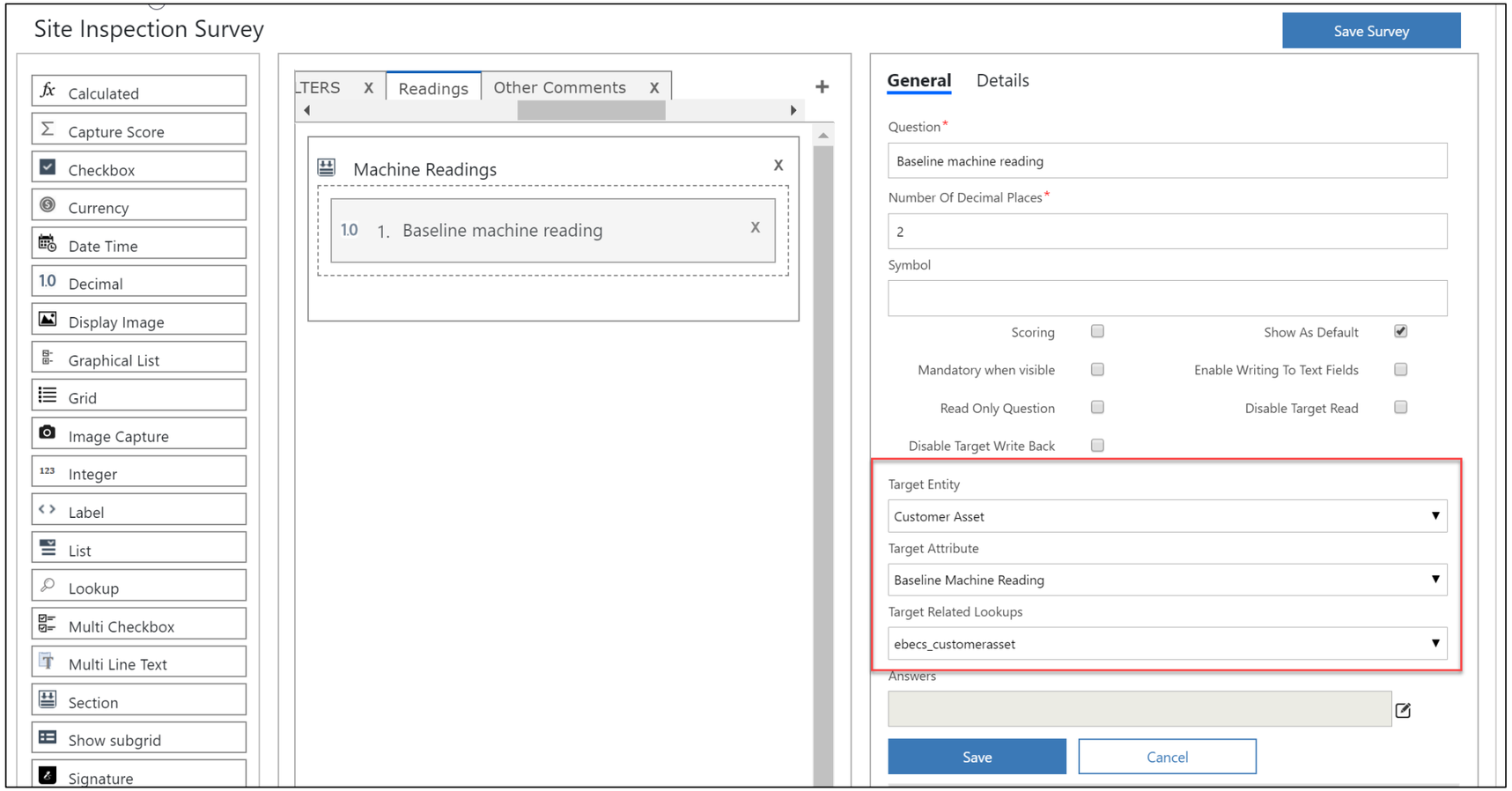
Read and Write Survey Data back to Dynamics 365

Read — Pull data into the survey as editable or read-only.

Write — Update fields on records based on the data captured.

Baseline — Perfect for baselining data where values previously captured are displayed.



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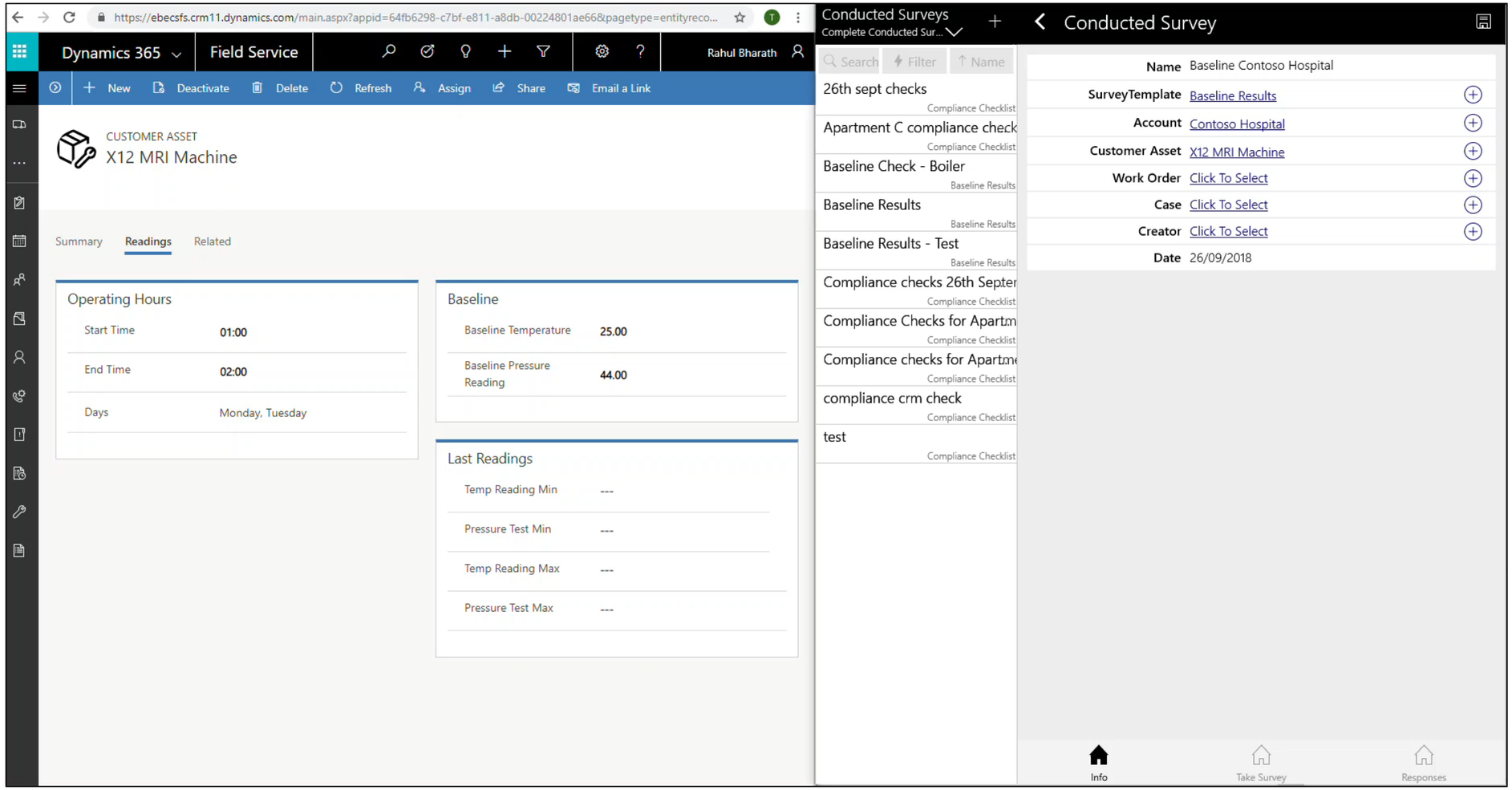
Baseline Survey - Example



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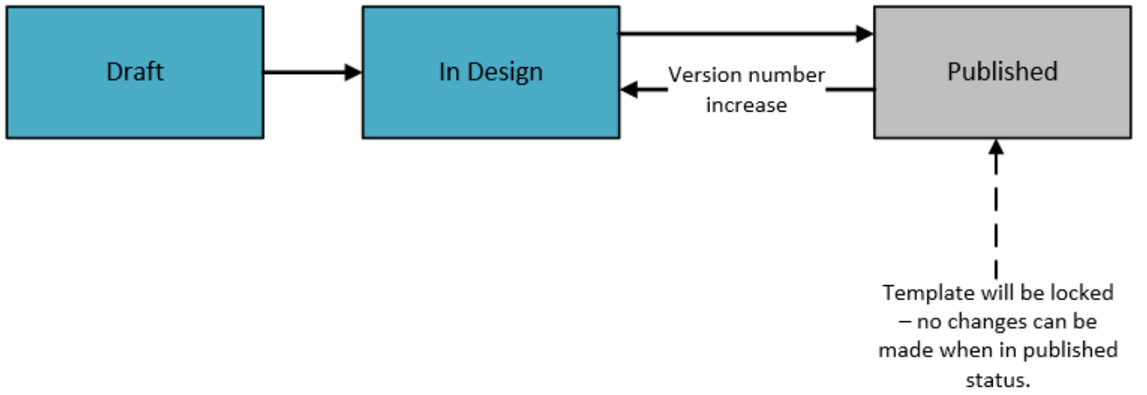
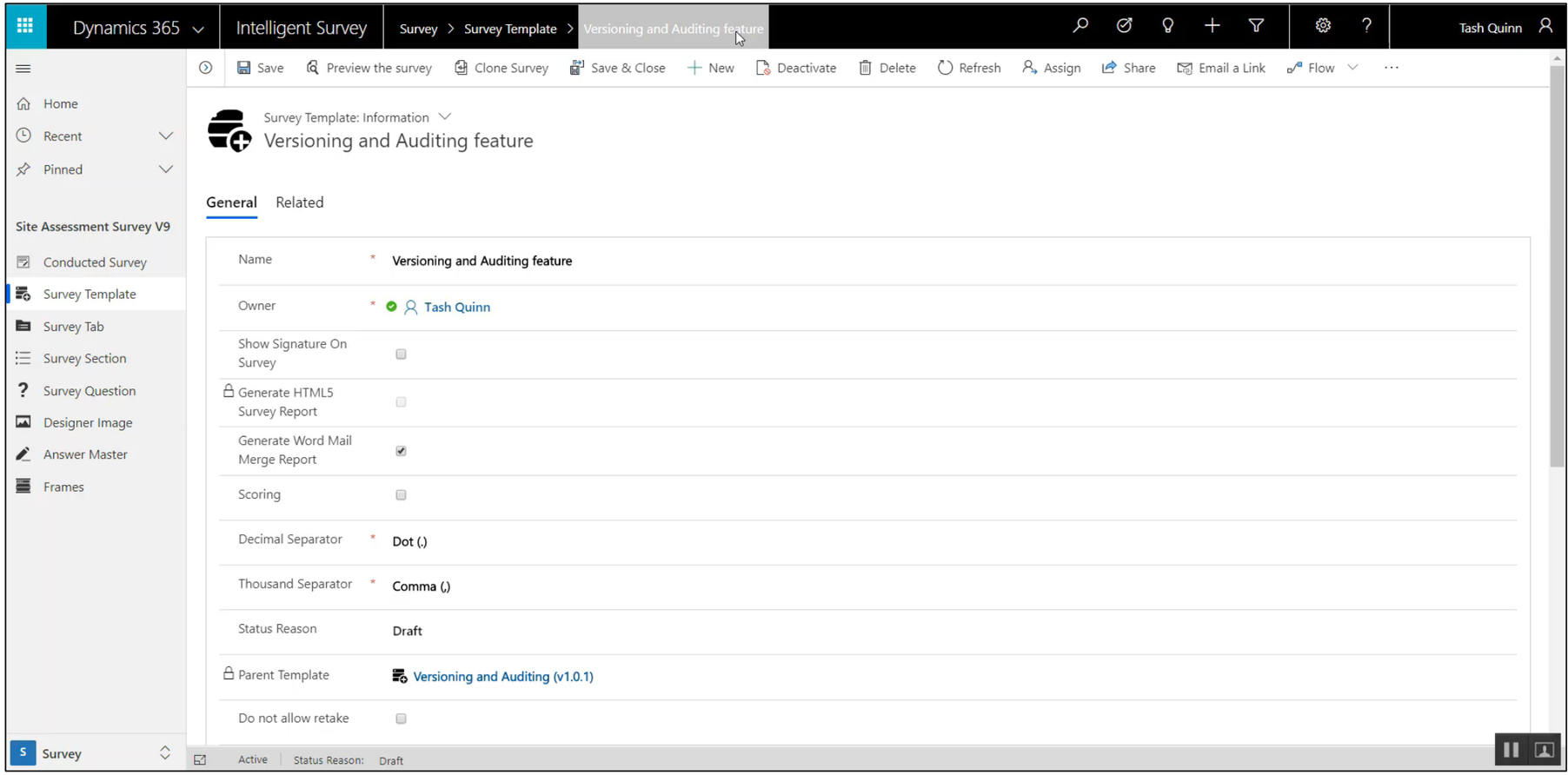
Versioning and Auditing



Control — Lock down changes to Published Templates.

Tracking — Track changes to Survey Template versions.

Revisions — Revise Major and Minor options available for revising Survey Templates.



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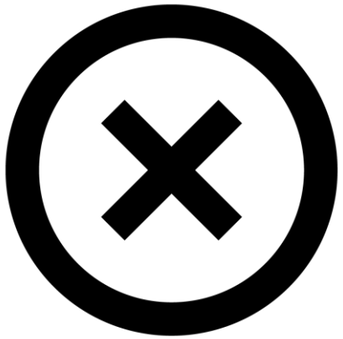
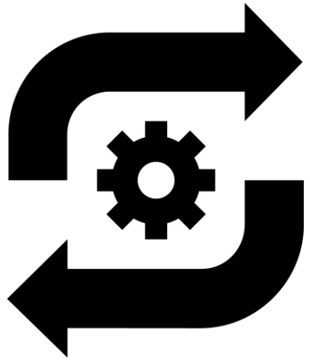
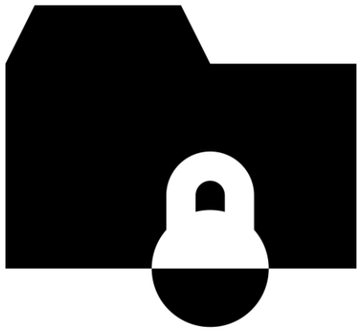
Intelligent Survey Migration Tool



Removes the process of manually re-creating Survey Templates in multiple environments



Perfect for moving surveys from Dev, to UAT and Production Environments



All Survey data is pulled across and linked to the relevant Parent Survey Template.

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Survey Allocation Rules

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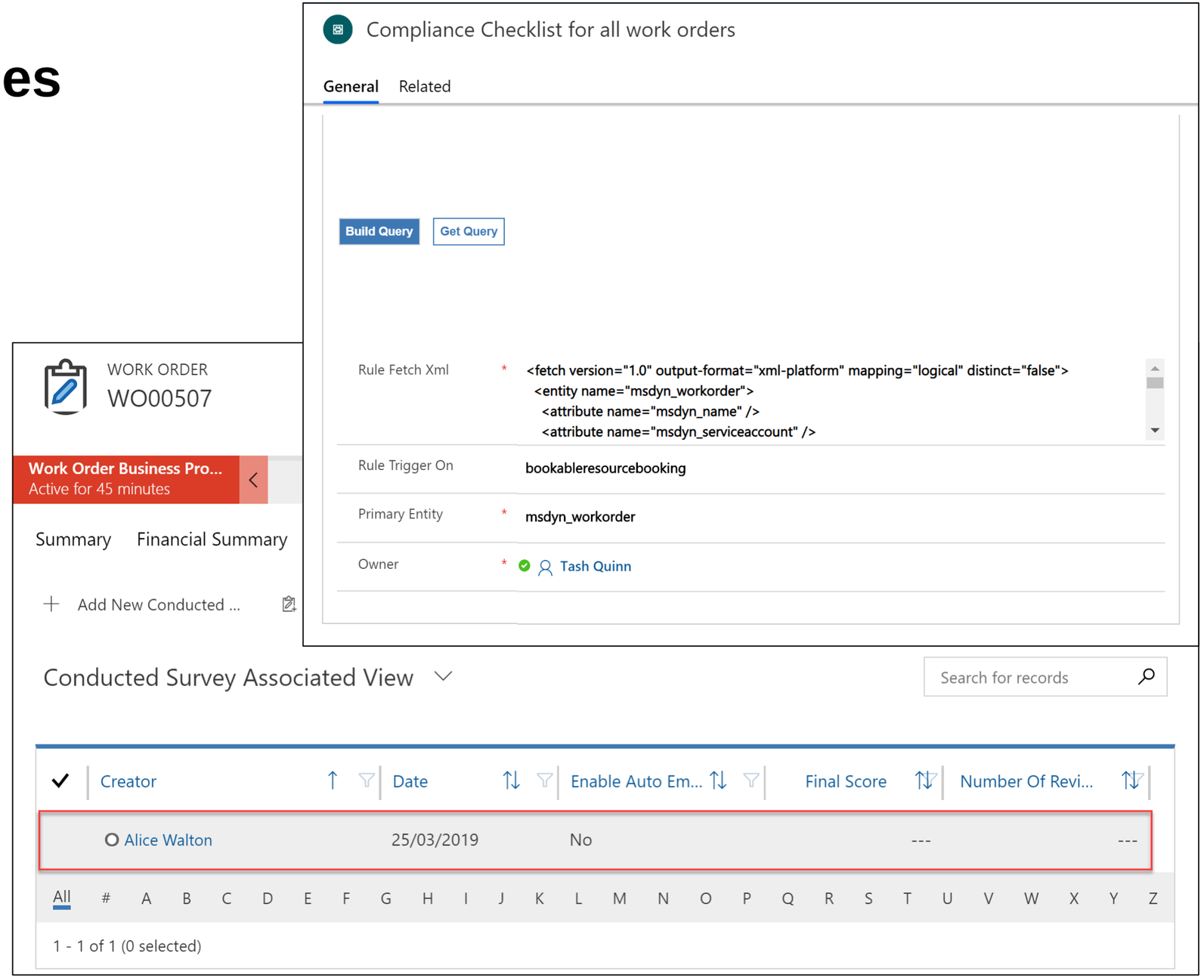
Survey Allocation Rules

Automated — Automatically generate surveys when new records are created.

Rules — Allocate surveys based on queries per Survey Template.

Flexible — Survey allocations and the rules are easy to update.



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Reporting

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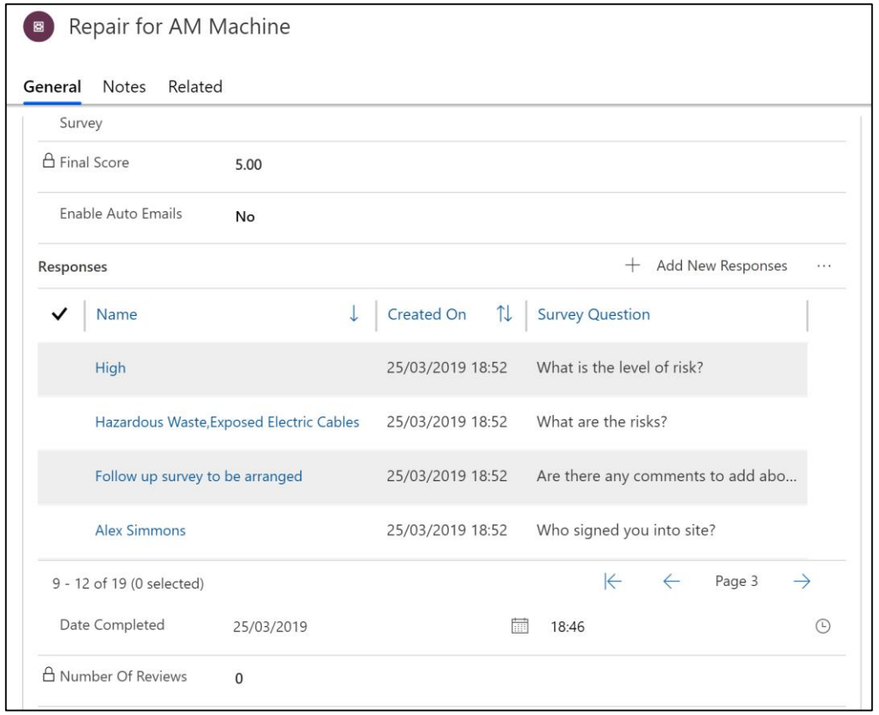
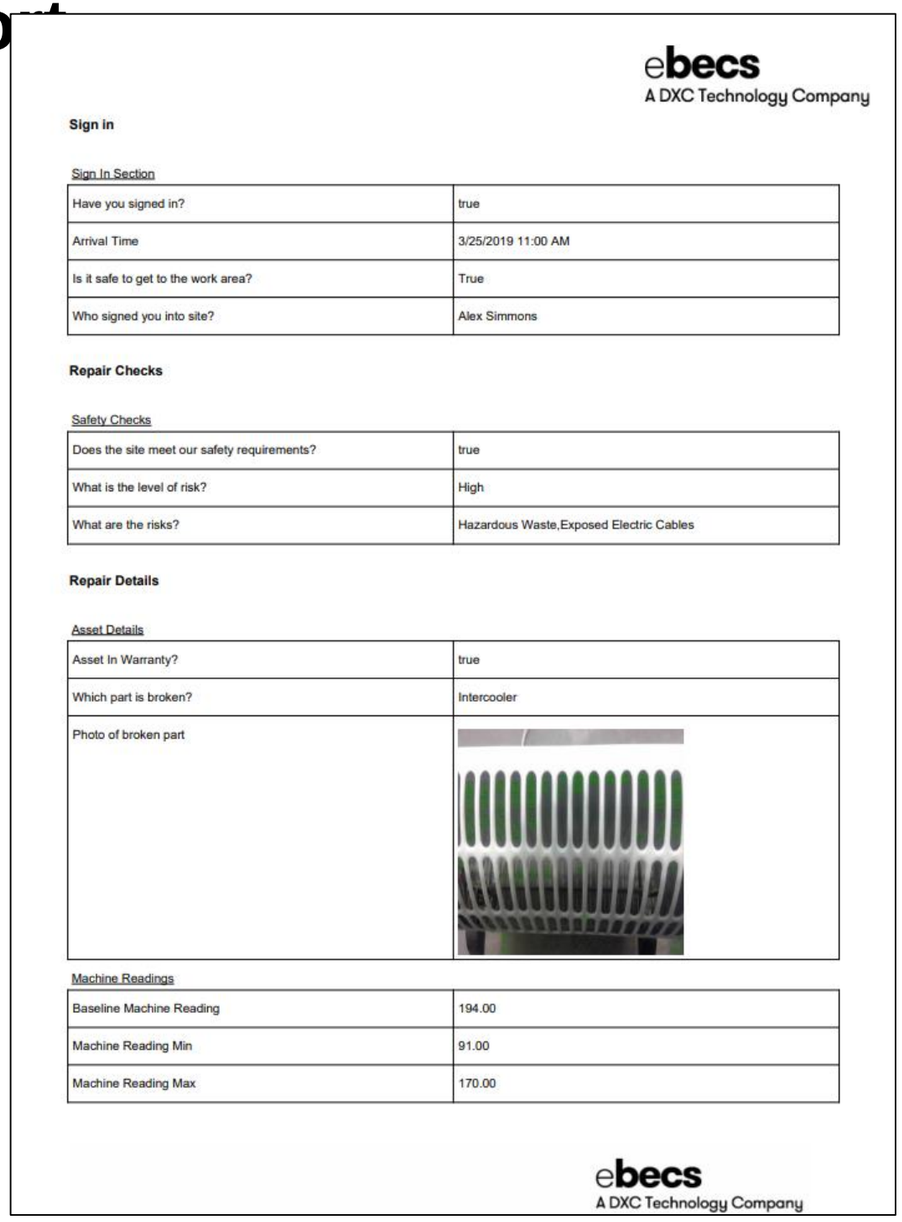
Completed Survey Records and HTML5 Report

Audit — View all survey answers, signatures and images in Dynamics 365.

Traceable — Provides full traceability of the survey to be provided to the customer.

Automated — Automatically generates a PDF of the completed survey.





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Sign in

Sign In Section

Have you signed in?	true
Arrival Time	3/25/2019 11:00 AM
Is it safe to get to the work area?	True
Who signed you into site?	Alex Simmons

Repair Checks

Safety Checks

Does the site meet our safety requirements?	true
What is the level of risk?	High
What are the risks?	Hazardous Waste,Exposed Electric Cables

Repair Details

Asset Details

Asset In Warranty?	true
Which part is broken?	Intercooler
Photo of broken part	

Machine Readings

Baseline Machine Reading	194.00
Machine Reading Min	91.00
Machine Reading Max	170.00

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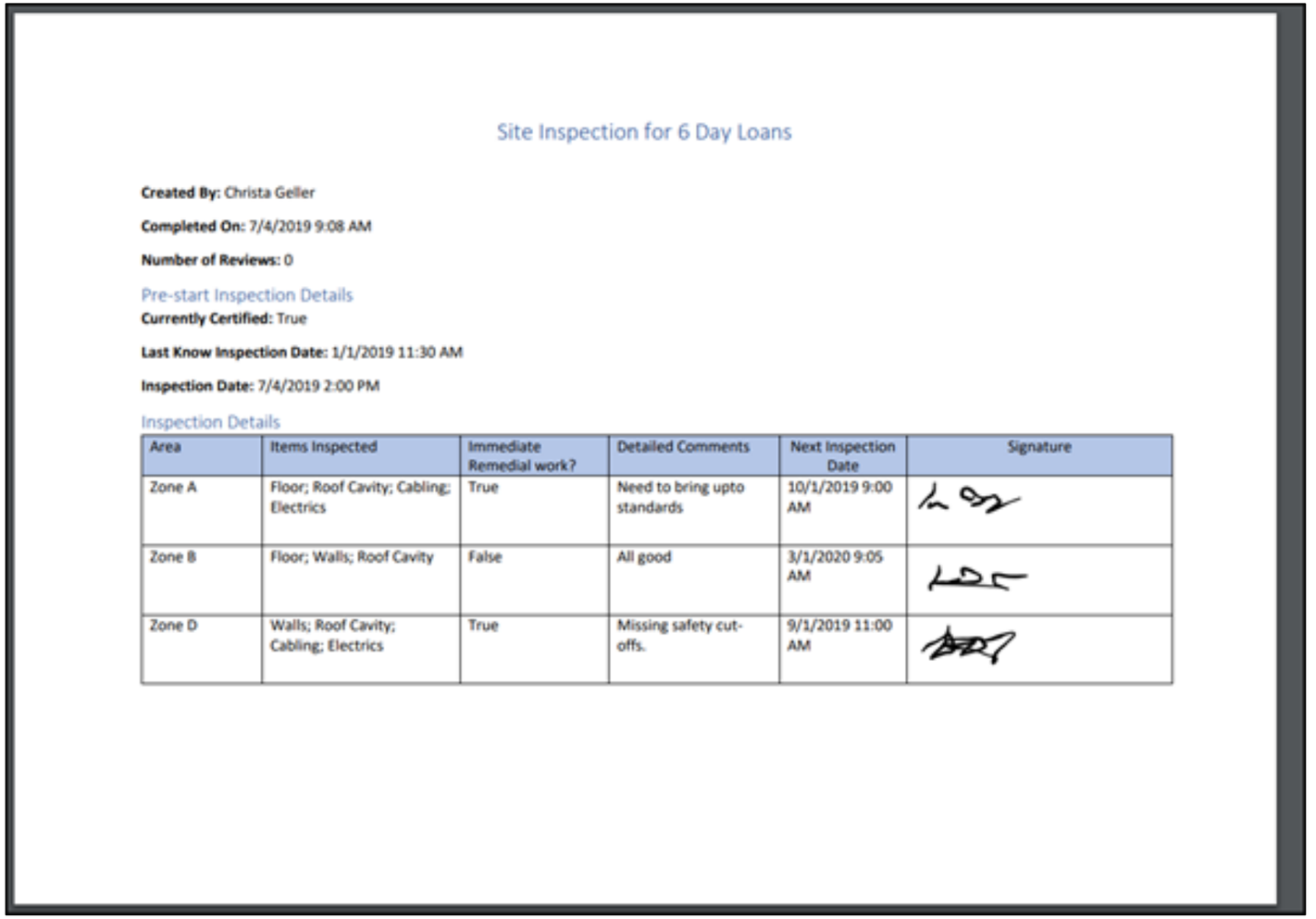
Reporting off Custom Entity using Mail Merge

Flexible	Easily build survey reports and interrogate survey responses.
Traceable	Generates tables in the CDS to mirror the questions in the survey template.
Automated	Automatically generates a PDF of the completed survey.



Site Inspection for 6 Day Loans

Created By: Christa Geller

Completed On: 7/4/2019 9:08 AM

Number of Reviews: 0

Pre-start Inspection Details

Currently Certified: True

Last Know Inspection Date: 1/1/2019 11:30 AM

Inspection Date: 7/4/2019 2:00 PM

Inspection Details

Area	Items Inspected	Immediate Remedial work?	Detailed Comments	Next Inspection Date	Signature
Zone A	Floor; Roof Cavity; Cabling; Electrics	True	Need to bring upto standards	10/1/2019 9:00 AM	
Zone B	Floor; Walls; Roof Cavity	False	All good	3/1/2020 9:05 AM	
Zone D	Walls; Roof Cavity; Cabling; Electrics	True	Missing safety cut-offs.	9/1/2019 11:00 AM	

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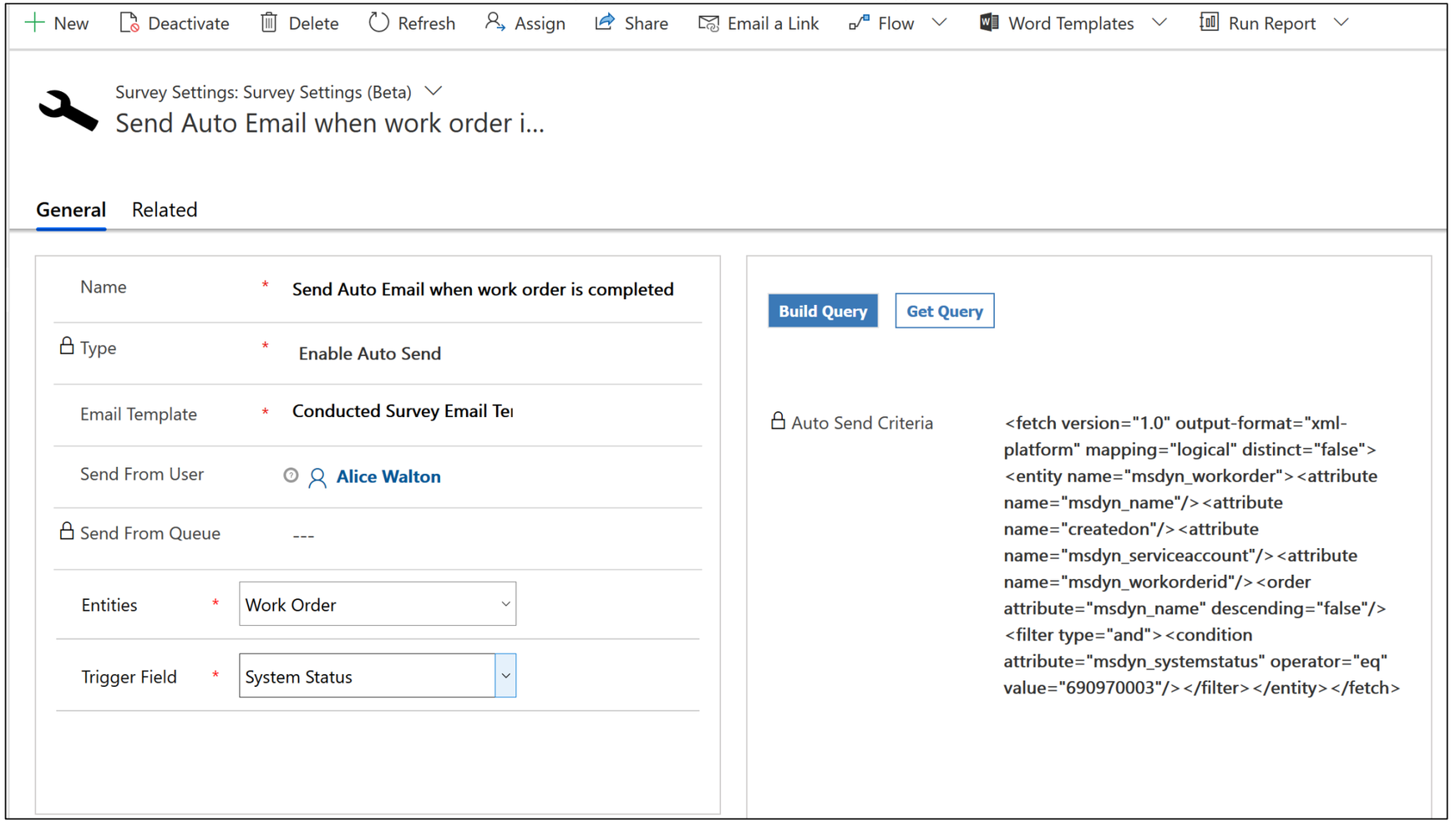
Emailing a Completed Survey

The Completed Survey PDF can be automatically emailed upon completion to various email recipients, e.g. the Primary Contact at the Billing Account.



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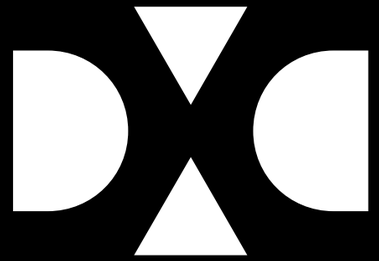

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