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MS CRM Gamification Tool

Administrator Reference Guide

Microsoft Dynamics CRM 2011 Compatible



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Overview

This document outlines the installation and configuration process for MS CRM Gamification Tool.

Microsoft CRM Compatibility

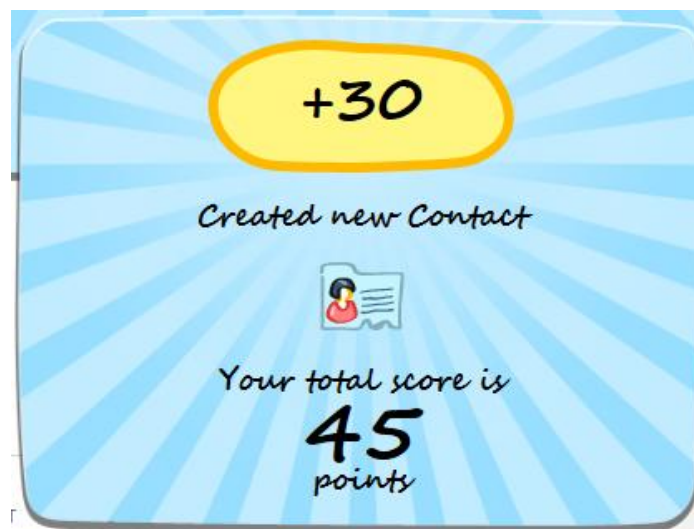
MS CRM Gamification Tool is compatible with Microsoft Dynamics CRM 2011 online/on-premise/IFD.

About MS CRM Gamification Tool

MS CRM Gamification Tool is CRM add-on that enables managers to increase user adoption and to motivate sales teams by adding game elements to everyday routine operations.

People who participate in this endeavor take part in the contest that is regulated by the following rules:

- A user gets points for each “create” or “update” operation in CRM (create a lead – get points, complete a task – get points and so on) that are immediately displayed in a special balloon in browser



- Top 5 players are displayed on a special Leaders Board.



- This leaders' board also displays the user's score compared to the closest player.
- Ranks: Earned points bring users respect and special ranks. They can progress from novices to grand masters. The ranks are depicted on the leaders' board in front of the users' names. ★ 🌟 🌟 🌟 🌟 🌟
- Customizable set-up allows you to encourage and reward what you want (For example if your sales team isn't making enough phone calls you can assign a high point value to making phone calls).

CRM Gamification Configuration

Please, fill in the table with the points for each entity. These points will be used to measure user activities and will be displayed in User's score and when a certain activity is created or updated.

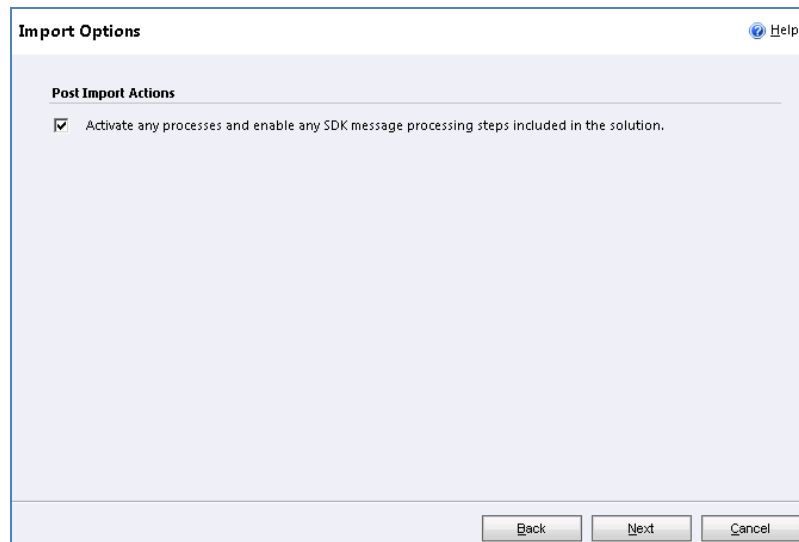
Entity	Create	Update	State 1	State 2	St
Account	15	1	1	0	
Address	5	1	1	0	
Appointment	10	1	1	5	
Article	0	0	0	0	Completed

- You can pick and choose the 'players' – the highly competitive sales team members can be in the game, and you can leave the rest out! Or you can try this approach for a small group of the people first, tune the system for your company and then turn on the gamification for everybody in your sales organization

Installation Instructions

1. Open Microsoft CRM as a user who has System Administrator role.
2. Go to Settings / Solutions and import CRM Gamification Solution

Important Note! Tick the “**Activate any processes and enable any SDK message processing steps included in the solution**” option on the **Post Import Actions** tab.



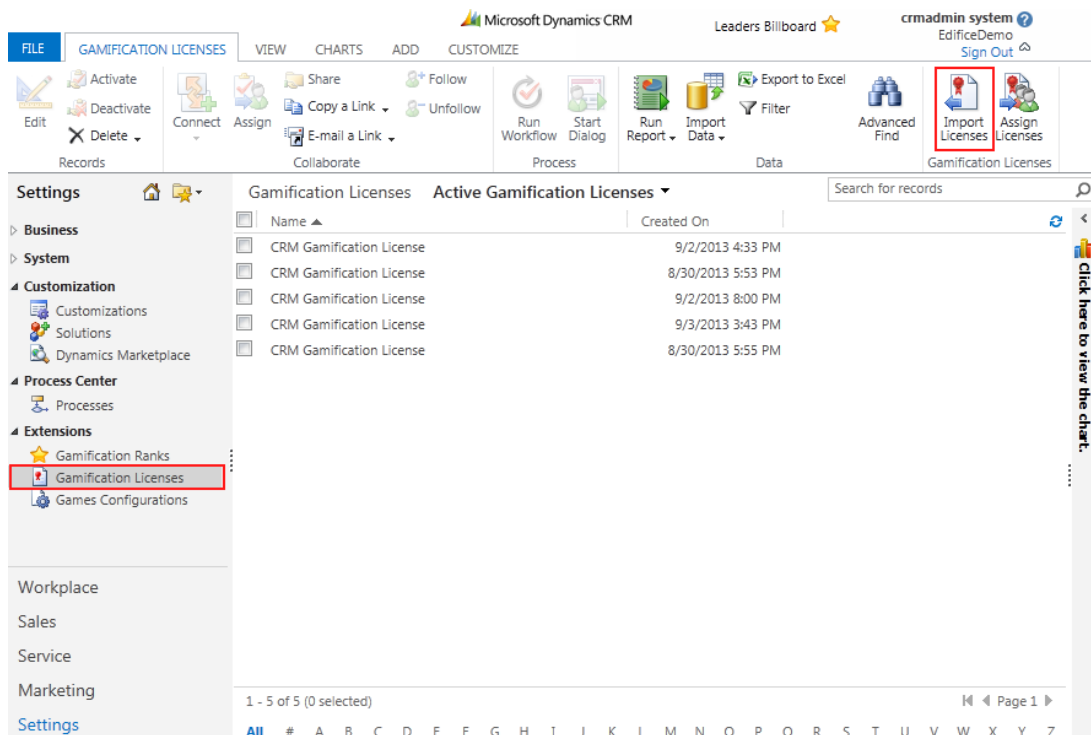
Import Options

Post Import Actions

☒ Activate any processes and enable any SDK message processing steps included in the solution.

Back Next Cancel

After installation, go to **Settings/ Extensions/Gamification Licenses** and click **Import Licenses**



Microsoft Dynamics CRM

Leaders Billboard

crmadmin system EdificeDemo Sign Out

GAMIFICATION LICENSES VIEW CHARTS ADD CUSTOMIZE

FILE

Activate Deactivate Edit Delete Connect Assign Share Copy a Link E-mail a Link Follow Unfollow Collaborate Run Workflow Start Dialog Run Report Import Data Export to Excel Filter Advanced Find Import Licenses Assign Licenses

Settings

Business

System

Customization

Customizations

Solutions

Dynamics Marketplace

Process Center

Processes

Extensions

Gamification Ranks

Gamification Licenses

Games Configurations

Workplace

Sales

Service

Marketing

Settings

Gamification Licenses Active Gamification Licenses

Search for records

Name	Created On
CRM Gamification License	9/2/2013 4:33 PM
CRM Gamification License	8/30/2013 5:53 PM
CRM Gamification License	9/2/2013 8:00 PM
CRM Gamification License	9/3/2013 3:43 PM
CRM Gamification License	8/30/2013 5:55 PM

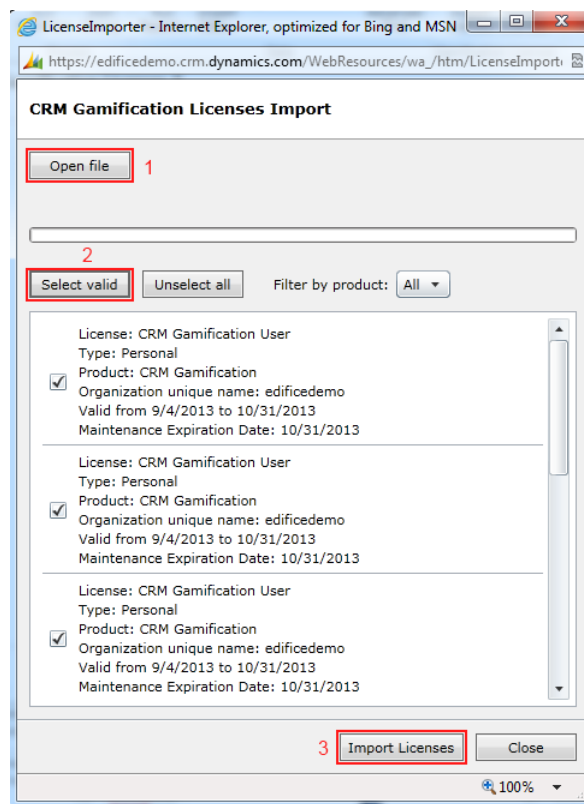
1 - 5 of 5 (0 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Page 1

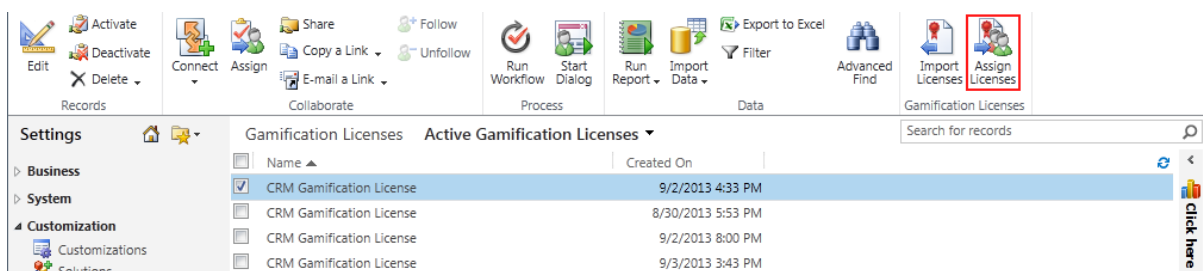
Click here to view the chart.

Click **Open file** and then **Select Valid** licenses. After that click **Import licenses**.



By default all licenses are assigned to the person who imported them. CRM Administrator can select users that will participate in MS CRM Gamification.

Select the license you want to assign and click **Assign License**.



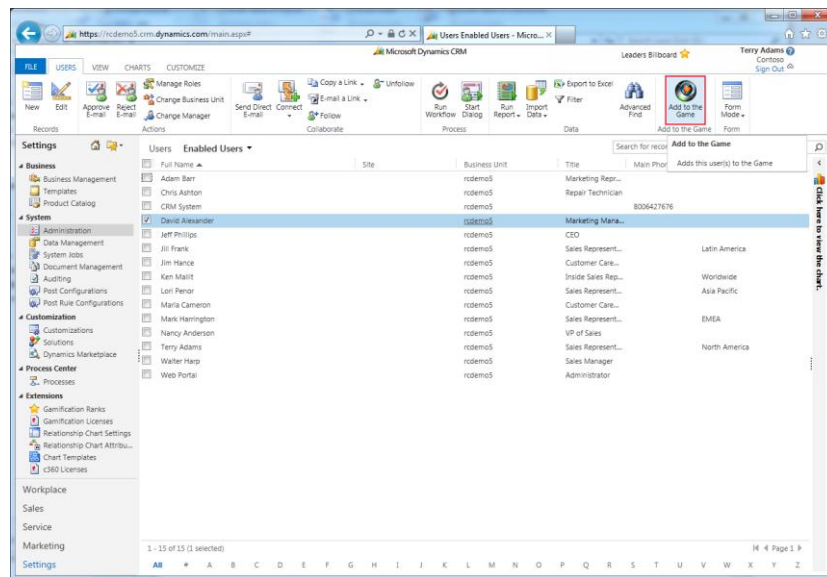
By default CRMGamifierAdministrator role is assigned to the person who imported the licenses. At least one user in CRM organization should have CRMGamifierAdministrator role. This role allows customizing Gamification points and levels and should be assigned to Gamification Tool Administrators.

Adding Users to the Game

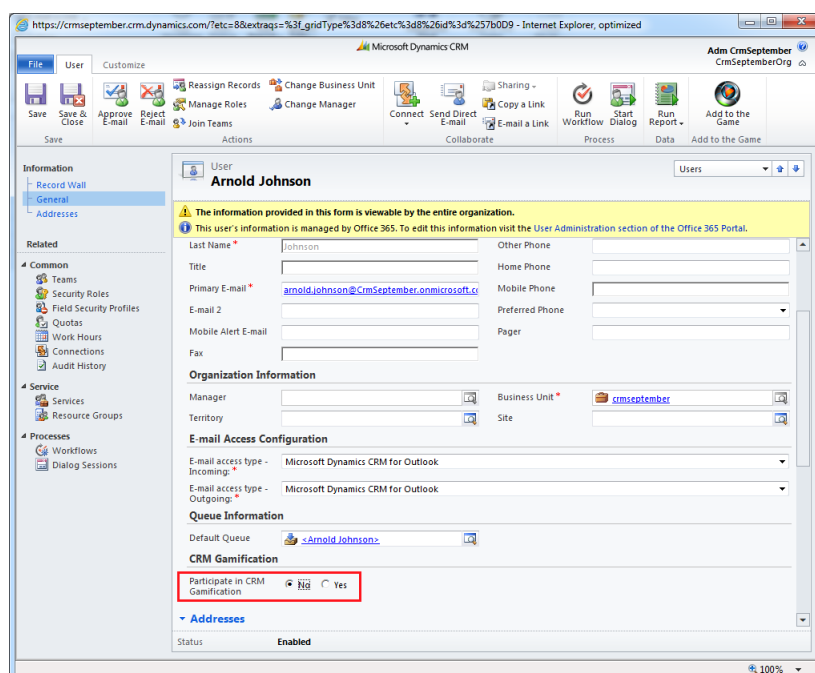
CRM Administrator can select users that will participate in MS CRM Gamification. Only those users that have been added to the Game, can get points and can see the Leaders Billboard.

To add users to the game, do the following:


1. Go to **Setting/Administration/Users**.
2. Select Users you want to add and click **Add to the Game**.



3. To remove user from the Game, double click on the user, scroll down to the CRM Gamification Section and select "No".



After you added all users, clear your IE cache using Ctrl+F5 and after that Leaders Billboard will appear next to User's name at the top of the screen

To open/hide Billboard, click on the star .

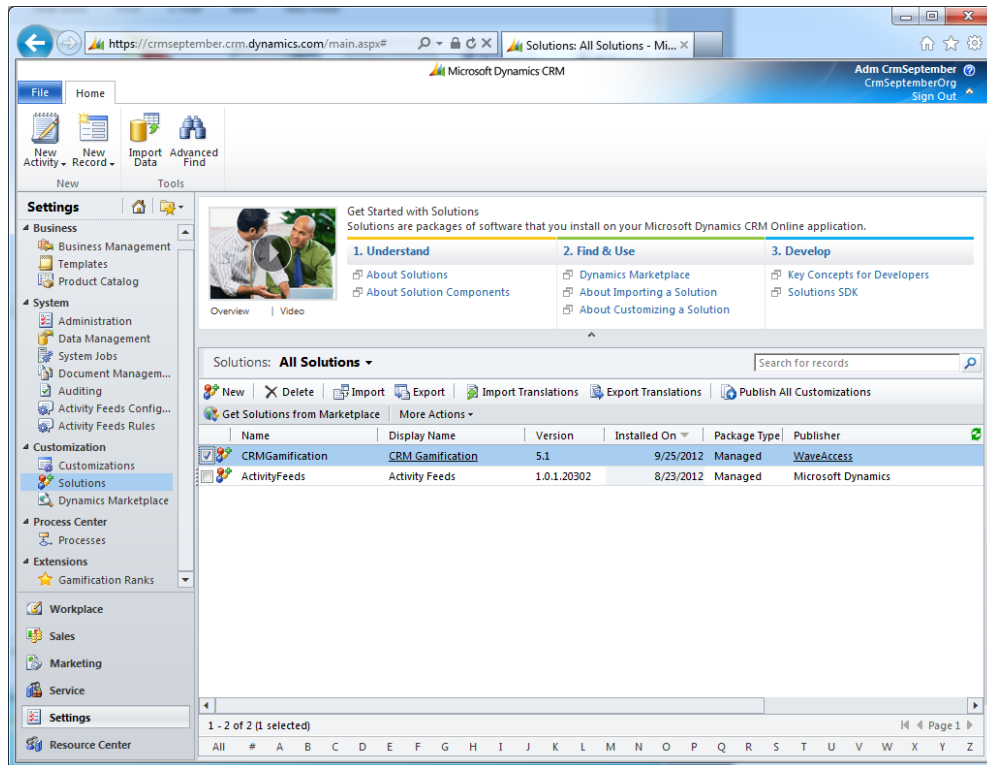


Configuration

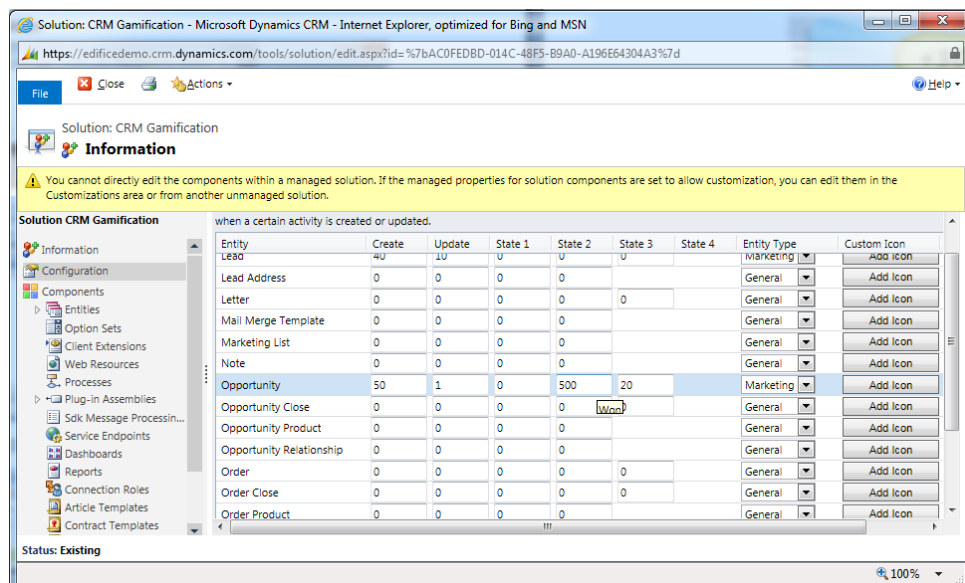
1.1 How to manage and modify points

The system allows CRM administrator to assign arbitrary number of points for performing any create or update operation in MS CRM.

1. Go to Settings / Solutions



2. Double click on the CRM Gamification Solution to set the number of points

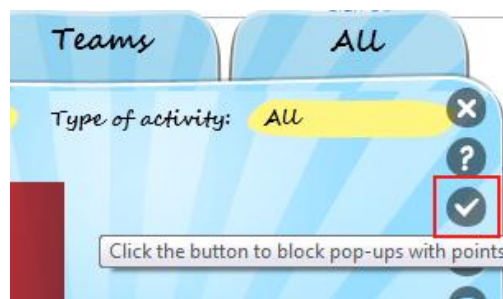


You can set the points for each “create” or “update” operation as well as for changing the status of the entity. The state for each entity can be seen on mouse over.

Once the entity status has been changed or a record has been created, user gets the predefined amount of points.



To see the notifications of points being awarded, click  on the Leaders Billboard.



1.2 Setup Gamification Ranks

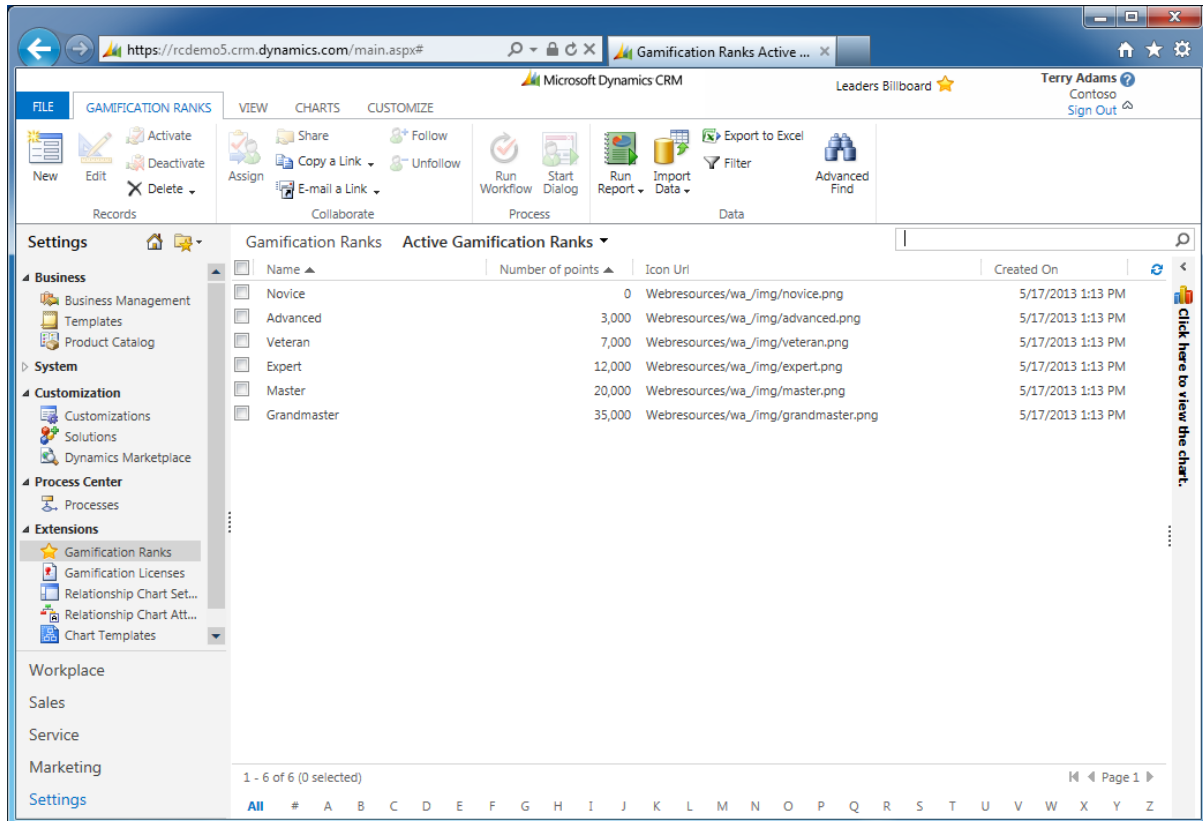
Every user who participates in CRM Gamification has a Rank. The rank depends on the number of earned points and as soon as the user reaches the next level, he gets the higher rank.

By default the ranks are the following:

- ★ Novice
- ★ Advanced
- ★ Veteran
- 🏆 Expert
- 🏆 Master
- 🏆 Grandmaster

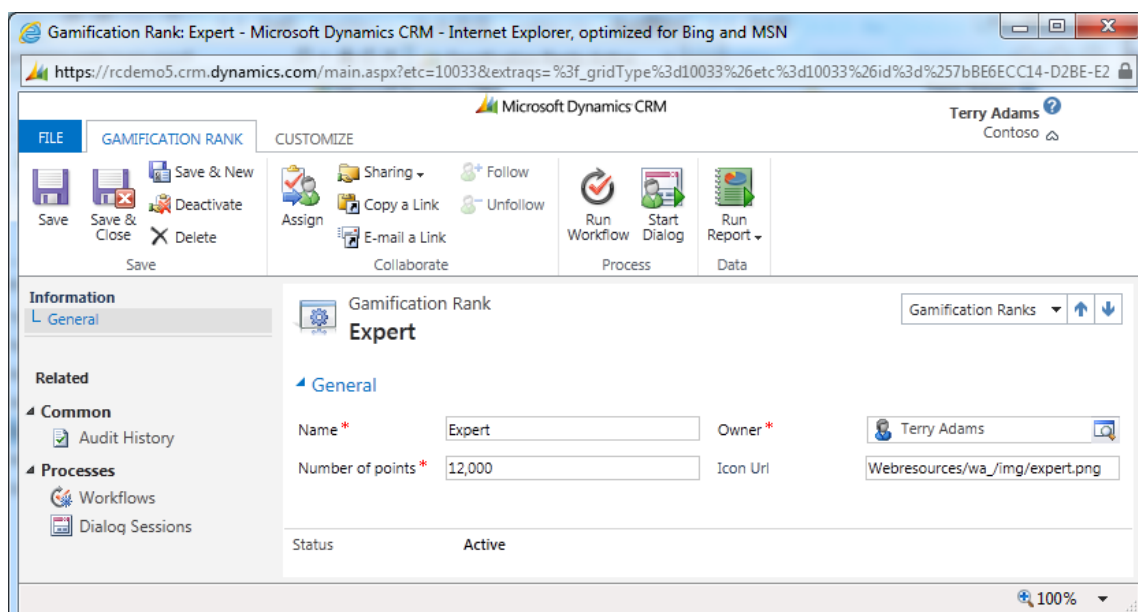
But you can easily change the name of the ranks as well as the number of points.

For this go to **Settings/Gamification Ranks**

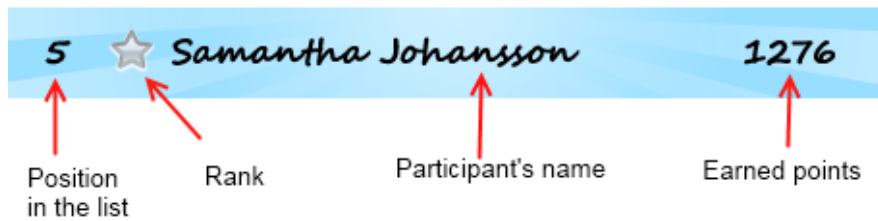


Double click on the rank, if you want to change it.

Click **New** if you want to add a new rank. Enter Name and Minimum Rating. Click Save and Close.

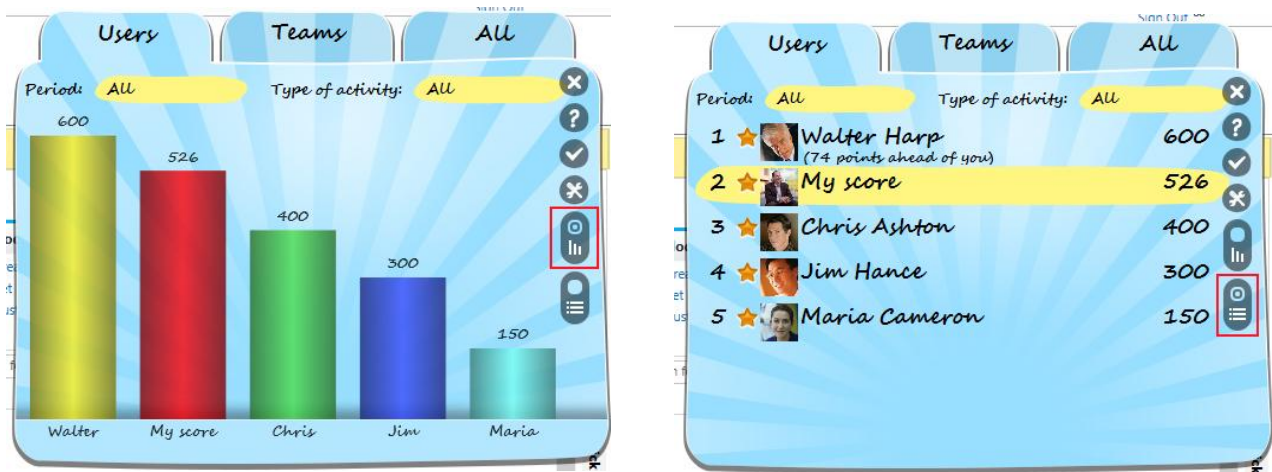


The rank is displayed on the Leaders Board next to the participant's name.



1.3 How to display results

The results can be displayed either as text or as a bar chart. Select one of the radio buttons:



You can also display both boards at the same time.



1.4 How to filter results

You can filter results by the type of activity and the period. Click the Setting button and select the option you prefer. After that, click “OK”.



1.5 Teams

You can also track results of CRM Teams. If you are a member of a particular CRM team, your points will be added to the points of this team.



To see all results (users & teams), select “All” tab.



	Users	Teams	All
Period:	All	Type of activity:	All
1	★		My score 1682
2	★		Walter Harp 600
3	★		Sales Team #1 507
4	★		Chris Ashton 400
5	★		Jim Hance 300