

**User Manual** 

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# Introduction

Gamifics365 is a productivity app that aims to enhance Dynamics 365 CRM productivity and adoption by creating an enriching and motivating environment for CRM users through gamification and engaging games and activities. It provides a medium to create appealing games to encourage a healthy competition between both individuals and teams combined. These games help to ignite the competitive spirit of CRM users and motivates them to achieve over and beyond their individual capability. The daily stressful routine work can be converted to something livelier and fun with this gamification app resulting in higher productivity and better business growth rate.

### **Salient Features:**

- Unique platform to create and manage engaging games within Dynamics 365 CRM
- Create fun-filled varieties of games like Challenge, Face-off and Race for players
- Make your own rules for the games
- Create customized badges and rewards for the top players and teams
- Track the performance of teams and players through mobile app
- Set criteria for participation in the games
- Copy rules of existing games to create new games
- View the performance of players live on scoreboards and leaderboards

Available for: Microsoft Dynamics 365 v9.1 and above, Dataverse (Power Apps).

Deployment: Online.

### **Security Roles**

This solution has three security roles - Gamifics365 Administrator, Gamifics365 Manager and Gamifics365 User.

- Gamifics365 Administrator The user with Gamifics365 Administrator security role is in charge of setting up of the solution. They can create games and set rules for these games. Further, they can modify any games or rules created by managers with Gamifics365 Manager security role.
- Gamifics365 Manager The user with Gamifics365 Manager security role can create games and manage games for the team members. For example Sales Manager can create games for the Sales representatives working under them.
- Gamifics365 User The user with Gamifics365 User security role can view and participate in the games.

# Prerequisite

After license registration, there are some steps to be taken to ensure the smooth functioning of the Gamifics365 app. This includes setting a time zone for the flow and activating it to ensure that all the games created in Gamifics365 start and end on time.

To set the time zone and activate the flow, follow the simple steps given below:

• Go to <u>flow.microsoft.com</u>  $\rightarrow$  Select the environment.

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	Power Automate	Search for helpful resources	Environments	
=			Environments	×
ഹ	Home	Take care of what's important. Automate the rest.		_
D	Action items 🗸 🗸	Create automated workflows with Microsoft Power Automate.	Search	
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#### • Go to Solutions.

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Ш	Learn		by Microsott				BA MIC	10	
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• Select **Gamifics365** solution  $\rightarrow$  Go to **Cloud flows**.

	Power Automate	♀ Search for helpful resources				
=	♀ Search	+ New ∨ 🕆 Add existing ∨ 📮 Publish all custor	nizations			
$\leftarrow$	Ē AII (183)	<ul> <li>You cannot directly edit the objects within a managed solution. If solution.</li> </ul>	the manage	d properties for solutio	on objects are set to al	low customization,
	P Apps (2)					
	ф Chatbots (0)	Gamifics365 > Cloud flows				
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U	♥ Connection references (2)	୍ୟ Gamifics365 Calculate Player Rank		Gamifics365 Calc	Cloud Flow	Yes
	Eustom controls (1)	ه. Gamifics365 Schedule and End Games		Gamifics365 Sch	Cloud Flow	Yes
	Email templates (2)					
	3 Plug-in assemblies (3)					

• Select 'Gamifics365 Schedule and End Games' flow → Click on 'Edit'.

	Power Automate	Search for helpful resources	
=		🖉 Edit 💪 Share 🕏 Save As 🗻 Delete ▷ Run 🗈 Send a copy 억 Submit as template	↦ Export
ώ	Home	Flows > Gamifics365 Schedule and End Games $\oplus$	
Ċ	Action items $~~$		
₀⁄°	My flows	Details	Edit
+	Create	Flow Status Gamifics365 Schedule and End Games Off	
ත්	Templates	Owner         Created           Max M         Apr 4, 10:03 PM	
¢a	Connectors	Modified May 17, 11:54 AM	
0	Data $\lor$	Туре	
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ංශ්	Al Builder $$	This flow runs on owner's	s plan

• Click on the first step 'Run every Day at 00.01 AM' → Click on 'Edit'.

← Gamifics365 Schedule and End Games	🏷 Undo 🦿 R	edo 💭 Comments 📙 Save 😲 Flow checker
	Run Every Day at 00:01 AM	(j) ····
	Please select the time zone in which you want to Run the Games	×
	Runs at 0:01 every day Edit	
	{x} Initialize timeZone	····
	{x}         Initialize yesterdayDate	····
		P a g e 5 of 40

• Now, click on 'Show advanced options'.

Run Every Day at 00:01	AM	(i)
Please select the time zone in	which you want to Run the Games	×
* Interval	* Frequency	
1	Day	$\sim$
Show advanced options 🗡		
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• Select the preferable time zone from the dropdown.

🗿 Run Every Day	Run Every Day at 00:01 AM						
면 Please select the tim	Please select the time zone in which you want to Run the Games						
* Interval		* Frequency					
1		Day	$\sim$				
Time zone	(UTC+05:30) Chennai, Ko	olkata, Mumbai, New Delhi	$\sim$				
Start time	(UTC+05:00) Astigabat, 1 (UTC+05:00) Ekaterinbur	g	•				
At these hours	(UTC+05:00) Islamabad,	Karachi	1				
At these minutes	(UTC+05:30) Chennai, Ko	1					
	(UTC+05:30) Sri Jayaward	ļ					
Preview	(UTC+05:45) Kathmandu	I					
Runs at 0:01 every day	(UTC+06:00) Astana		1				
Hide advanced options	(UTC+06:00) Dhaka	(UTC+06:00) Dhaka					
(UTC+06:00) Novosibirsk							
(UTC+06:30) Yangon (Rangoon)							
	(UTC+07:00) Bangkok, H	anoi, Jakarta					
{x}     Initialize timeZ     (UTC+07:00) Barnaul, Gorno-Altaysk							

 Next, click on the second step 'Initialize Time Zone' → Add the appropriate time zone in the 'Value' field.

{x}Initialize timeZone⑦								
Please put your time us/library/gg154758	Please put your time zone by following this link - https://msdn.microsoft.com/en- us/library/gg154758.aspx							
*Name	timeZone							
*Туре	String		$\sim$					
Value	Enter initial value							

• Click on 'Save'.

$\leftarrow$	Gamifics365 Schedule and End Games		🏷 Undo 🦿 Redo 🖵 Co	omments 📙	Save 🛂 Flow checker
			$\downarrow$		
		$\{x\}$ Initialize timeZ	one	···· ©	
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		*Name	timeZone		
		*Туре	String	$\sim$	
		Value	India Standard Time		

 Now go back to 'Gamifics365 Schedule and End Games' flow → Click on 'Turn On' to activate the flow.



## Set Game Rules

Every game has certain rules. Before creating any game, it is mandatory to set the rules based on which games will be played. In Gamifics365, users can set the game rules in 'Gamifics365 Studio'. It is a platform to create and manage game rules for different types of games within Dynamics 365 CRM.

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To set the game rules, users have to follow the simple steps given below:

• Navigate to Gamifics365 app → Administration → Gamifics365 Studio → Click on '+New Rule'.

<b>III Dynamics 365</b> G	<b>EXAMPLE : : : : : : : : : : : : : : : : : : :</b>							
=	Gamifics365 Studio							
☆ Home								
🕒 Recent 🗸 🗸	Platform to manage game rule and game for your Dynamics 365 environment. Learn More							
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My Work	Game Rules Games							
Camifics365	Create game rule by selecting the condition for each rule. Learn More							
🖧 Leaderboards	+ New rule							
Administration								
🎯 Gamifics365 Studio	Rule Name Short Name Record Type Event							
🔄 Games	Create Phone Call CPC phone call create							

- The **'Create Game Rule'** form will open. Here, user can set the conditions of rule based on which game will be played.
  - **Rule Name:** Give appropriate name to the Game Rule.
  - **Short Name:** Give short name to the rule.
  - **Description:** Give short description about the rule.
  - What type of record is this?: Select the entity to which the record belongs to.
  - Select the event for the selected type of record: Define the occasion for which the rule is created. For example – When new lead record is created, when the status of a record is updated, etc.
  - Which date should we use?: Define which date should be used as cut-off date for completing a certain task that will earn points for the players, i.e., date on which record is created, modified or won. For example Actual Close Date, Final Decision Date, etc.
  - Who should get the score: Select to whom the score should be given. In this field, multiple options can be selected.
  - Calculate score by: There are two options available Actual field value or Fixed points
    - Actual field value: The actual value will be considered here, such as Actual Revenue, Budget Amount, etc. User has to select the appropriate value from the dropdown list. For example – In a game of two players 'Actual Revenue' is selected for the actual field value. Now, player A has closed a deal worth \$10,000.00 and player B has closed a deal worth \$7500.00 then the score of

player A will be 10,000 and the score of player B will be 7500. Here the winner is player A.

- Fixed points: Here, a fixed point is defined for each deal closed by the player like 100, 200, 500, etc. For example – Suppose for each deal closed by the player will be awarded 100 points then as per the above example both player A and player B will score 100 points each for closing the sales deal. Here, it will be tie between two players.
- **Choose how to filter the record further:** Defines the criteria of the records on which the game rule will be applicable. Select either Simple or Advanced.
  - **Simple:** User can select any 'View' from the dropdown. All the records coming under this view will be considered while playing the game.
  - Advanced: User can further define and set criteria for records through fetch XML. This will restrict the rule to select few records instead of all records under a single view. For example – In a game between two sales reps, each sales rep is given a target to achieve total sales of \$5000 in a month. But a condition is given that only sales deal worth \$500 or more will be considered. So, even if the sales rep closes a deal worth \$450, it will not be counted.

<b>III</b> Dynamics 365	amifics365					ר פּ ד + ג פּ
≡ ŵ Home	Gamifics365	Studio	Create Game Rule × Set rule conditions and score to automatically calculate against the players of the			
© Recent ∨ ☆ Pinned ∨ My Work € Gamifics365	Platform to manage game i Game Rules Games Create game rule by select	rule and game for your Dy	mamics 365 environmen I rule. Learn More	t. Learn More		games.team more  Rule name* ①  Eg. Won Opportunities  Eg. WONOPP  Enter a simple description - this will be shown to individuals. ①  E.a. Opportunity where status equal to won
Leaderboards      Administration     Gamifics365 Studio	Rule Name	Short Name	Record Type	Event	Ste	What type of record is this?* ①
<ul> <li>Games</li> <li>型 Badges</li> <li>A Users</li> </ul>	Create Phone Call Win Opportunity Create Opportu	: срс : wo : со	phonecall opportunity opportunity	create win create	Ac Ac Ac	Select the event for the selected type of record* ()
<ul> <li>Error Logs</li> <li>License Registration</li> <li>Help</li> </ul>	Add Member to Qualify Lead	AMtML	list	addmember qualifylead	Ac Ac	Which date should we use?* ①
User Manual	Create Lead 1 - 10 Of 11	. CL	lead	create	Ac	wino snowia get scorer" U

<b>III Dynamics 365</b> G	amifics365					₽ ♀ + ▼ ♥ ? (
=	Gamifics365	Studio				Create Game Rule ×
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My Work	Create game rule by selec	cting the condition for ea	ich rule. Learn More			~
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	Qualified and	: 01	load	qualifylead	A.c.	⊖ Simple
Help	Quality Lead		ieau	quanyicuu	Ac	Advanced
User Manual	Create Lead	; CL	lead	create	Ac	
	1 - 10 Of 11					Create Rule Cancel

• Once the required fields are filled, click on 'Create Rule'.

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☰ 命 Home	Gamifics365	Studio				Create Game Rule × Which date should we use?* ①	
🕒 Recent 🗸 🗸	Platform to manage gam	e rule and game for your	Dynamics 365 environme	ent. Learn More		Actual Start V	
<ul> <li>✓ Pinned ✓</li> <li>My Work</li> <li>✓ Gamifics365</li> </ul>	Game Rules Games	Game Rules     Games       Create game rule by selecting the condition for each rule. Learn More         Who should get score?* ①         Created By, Modified By					
Leaderboards	+ New rule					Calculate score by * O Actual field value	
Gamifics365 Studio	Rule Name	Short Name	Record Type	Event	Sta	Fixed points	
🚱 Games	Create Phone Call	; CPC	phonecall	create	Ac	Fixed Points * ①	
Badges Badges	Win Opportunity	: WO	opportunity	win	Ac	100	
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Help	Qualify Lead	QL	lead	qualifylead	Ac	Advanced	
User Manual	Create Lead	CL	lead	create	Ac		
	1 - 10 Of 11					Create Rule Cancel	

• The new rule will be created and can be seen on Gamifics365 Studio.

	Dynamics 365 Ga	amifics365					
≡ () F ()	Home Recent V Pinned V <b>Vork</b> Gamifics365 Leaderboards	Gamifics365 S Platform to manage game ru Game Rules Games Create game rule by selectin + New rule	<b>Stu</b> ule a ng tł	<b>udio</b> and game for your Dyna he condition for each ru	mics 365 environment. Le le. Learn More	earn More	
Admi	inistration Gamifics365 Studio	Rule Name	:	Short Name	Record Type	Event	Status
( ) (	Games	Create Phone Call	:	CPC	phonecall	create	Active
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Badges	Win Opportunity	: •	WO	opportunity	win	Active
	Users Error Logs	Create Opportu	:	со	opportunity	create	Active
<b>()</b> I	License Registration	Add Member to	:	AMtML	list	addmember	Active

# How to modify existing rules?

Game Rules are not written on stone. They are always modified to suit the circumstances of the game. In Gamifics365, users are given the provision to modify existing rules as and when required. But the existing rules can only be modified by the user who has **Gamifics365 Administrator** or **Gamifics365 Manager** security role.

To modify existing game rules, follow the steps given below:

• Navigate to Gamifics365 app → Administration → Gamifics365 Studio → Go to the existing rule you want to modify → Click on the ellipses (the three small dots).

	Dynamics 365 Gamifics365						
		Gamifics365	Studio				
ណ៍	Home						
Ŀ	Recent 🗸	Platform to manage game	e rule and game <mark>f</mark> o	or your Dynamics 365 enviro	nment. Learn More		
\$	Pinned 🗸						
My	Work	Game Rules Games					
¢	Gamifics365	Create game rule by sele	cting the conditio	n for each rule. Learn More			
<u></u>	Leaderboards	+ New rule					
Adr	ninistration						
¢	Gamifics365 Studio	Rule Name	Short Nam	e Record Type	Event		
(***	Games	Create Phone Call	СРС	phonecall	create		
Ŷ	Badges	Win Opportunity	wo	opportunity	win		
8	Users						
	Error Logs	Create Opportu	: 0	opportunity	create		
0	License Registration	Add Member to	AMtML	list	addmember		

• A number of options will be displayed such as – View Rule, Clone Rule, Activate, Deactivate and Delete. Here, click on 'View Rule'.



• Make the required changes to the rule  $\rightarrow$  Click on **'Modify Rule'**.

<b>III Dynamics 365</b>	amifics365					+ ۵ ک	Y	ŵ	? (
Ⅲ 命 Home	Gamifics365	Studio				Create Game Rule			×
Recent     V	Platform to manage game	rule and game for your	Dynamics 365 environme	ent. Learn More		Actual Start 🗸			
<ul> <li>S<sup>2</sup> Pinned ∨</li> <li>My Work</li> <li>Gamifics365</li> <li>Leaderboards</li> </ul>	Game Rules Games Create game rule by select	Game Rules     Games       Create game rule by selecting the condition for each rule. Learn More							
Administration	Rule Name	Short Name	Record Type	Event	Sta	Calculate score by "     Actual field value     Fixed points			
ලේ Games	Create Phone Call	E CPC	phonecall	create	Ac	Fixed Points * ①			
<ul><li>Badges</li><li>Q Users</li></ul>	Win Opportunity	: wo	opportunity	win	Ac	100			
Error Logs	Create Opportu	: co	opportunity	create	Ac	Filter the records for which this rule must apply (optional).			
License Registration	Add Member to	AMtML	list	addmember	Ac	Simple			
Help	Qualify Lead	QL CL	lead	qualifylead	Ac	Advanced			
🕒 User Manual	1 - 10 Of 11					Modify Rule Cancel			

# Users (Set Players)

Gamers create their own unique ID and nickname for playing games on virtual platforms. A similar provision is made by Gamifics365 for Dynamics365 CRM users. Users can create their unique gaming profiles for playing games. They can also set their availability for playing games. And depending upon the availability of players (users), managers can plan ahead and create engaging games for their respective teams (sub-ordinates).

To set player (user) profile, follow the steps given below:

• Navigate to Gamifics365 app → Administration → Users.

: Dynamics 365 🕴 G	iamifics365
=	$\leftarrow$ 🖾 Show Chart 💍 Refresh 🖾 Email a Link $\mid$ $\vee$
<b>命</b> Home	Gamifics365 Enabled Users ~
🕒 Recent 🗸 🗸	
🖈 Pinned 🛛 🗸	✓ Full Name ∨
My Work	Max M
🞯 Gamifics365	Alan A
📩 Leaderboards	Ben B
	Beret B
Administration	Beverly B
🕼 Gamifics365 Studio	
🟟 Games	Brock B
🖞 Badges	Bruce B
R Users	Kate K
Error Logs	Margie M
License Registration	Mia M

- Select User  $\rightarrow$  Go to Gamifics365 tab  $\rightarrow$  Fill information in the required fields and click on Save.
  - Available for Gamifics365: Select Yes to participate in games.
  - **Player Name:** Give an alias.
  - Avatar: Upload any picture of your liking.

User Max M - S	Saved		
Summary Details	Gamifics365 Administration Related		
Available for Gamifics365	* Yes		
Player Name	* Max Merry	Avatar	
			Open Delete

The user is now ready to participate in games.

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# Badges

The game is not complete without Badges & Rewards. Gamifics365 gives provision to create customized badges and rewards for the games. Users can create unique badges/rewards for each game or they can create a standard badge/reward which can be used in all games.

To create Badges & Rewards, follow the steps given below:

• Navigate to Gamifics365 app → Administration → Badges → Click on '+New'.

🔡 Dynai	mics 365 Gamifics365
	← 🖾 Show Chart + New 🗊 Delete   ∨ 🖒 Refresh
வி Home	Active Badges ~
🕒 Recent	$\sim$
🖈 Pinned	✓ Name ✓
My Work	Gold Badge
<b>G</b> Gamifics	s365 R Silver Badge
🚠 Leaderbo	ooards 🔒 🔒 Bronze Badge
Administratio	n Platinum Badge
	Q Gold Pin
Seamifics	s365 Studio
🟟 Games	
🖞 🕅 Badges	Bronze Pin
A Users	Platinum Pin
🗟 Error Log	gs
License F	Registration

- Fill in the required details and click on **Save**.
  - **Name:** Give a name to the badge or reward.
  - **Type:** Select either Badge or Reward.
  - **Icon:** Upload the appropriate icon for the badge or reward.

なり New Ba	ıdge	
eneral		
Name this badg	ge or reward	
Name	*	
Whether you w	vant to add badge or reward?	
Туре	*Select	$ $ $\vee$
	Select	
	badge	

Gold Badge Badge	age - Saved
Name this badg	ge or reward
Name	* Gold Badge
Whether you wa	ant to add badge or reward?
Туре	* Badge
Set Badge/Rewa	ard Image
lcon	Open Delete

# **Configure Games**

Once the rules are set, the next step is creating games. In Gamifics365, users can create three different types of games at individual and team levels namely; **Challenge, Face-off,** and **Race**.

- **Challenge:** In Challenge, individual players or teams will be given a task to be achieved in a limited amount of time. The one who achieves it wins the game.
- **Face-off:** In Face-off, two players will be pitted against each other.
- **Race:** In Race, all the players will be given a common target and the one who achieves it first wins the game.

To create engaging games within Dynamics 365 CRM, users have to follow the simple steps given below:

• Navigate to Gamifics365 app → Administration → Games → Click on '+New'.

🗰 Dynamics 365 🛛 🛛	iamifics365					
=	$\leftarrow$ 🕼 Show Chart	$+$ New 🗓 Delete $ $ $\vee$	🖔 Refresh	🖾 Email a Link   🗸 🛛 🕅	> Flow 🗸 🔟 Run Repo	rt \vee 🖷 Excel Templ
<ul> <li>ᢙ Home</li> <li>⊕ Recent</li> </ul>	Active Games	~				
S Pinned ∨	$\checkmark$ Name $\uparrow$ $\checkmark$	Start Date $\checkmark$	End Date $\checkmark$	Select Type of Game $\vee$	Behaviour of Game $\checkmark$	Game Is Between $\checkmark$
My Work	Best Salesperson	of the Mont 4/7/2022	4/21/2022	Race	Public	Teams
🎯 Gamifics365	Dialing for Dollar	s 4/1/2022	4/30/2022	Race	Private	Teams
Å Leaderboards	Easter Egg Hunt	4/1/2022	4/30/2022	Race	Public	Users
Administration	Gamified cold cal	ls 4/1/2022	4/30/2022	Challenge	Public	Users
Gamifics365 Studio	Pitch scattergorie	s 4/1/2022	4/30/2022	Challenge	Public	Fantasy Teams
🖄 Games	Sales stamina	4/1/2022	4/30/2022	Race	Public	Fantasy Teams
P Badges	Selling generic pr	roducts 4/1/2022	4/30/2022	Challenge	Private	Teams
A Users	The \$2 game	5/1/2022	5/31/2022	Face-Off	Private	Users
🗟 Error Logs						

OR users can directly navigate from Gamifics365 Studio;

• In Gamifics365 Studio, click on Games → Then click on 'Manage Games' → Click on '+New'.

	Dynamics 365	G	amifics365
≡			Gamifics365 Studio
ŵ	Home		
Ŀ	Recent	$\sim$	Platform to manage game rule and game for your Dynamics 365 environment. Learn More
Ŕ	Pinned	$\sim$	
Му	Work		Game Rules Games
¢	Gamifics365		Create or manage already created games. Learn More
an An	Leaderboards		다 Manage Games
Adr	ninistration		
¢	Gamifics365 Studio		
() ()	Games		
Ŷ	Badges		

In **'New Game'** screen there are 6 different tabs – **Game Details, Game Rules, Game Badge & Rewards, Earned Points** and **Earned Badges & Rewards.** The first tab is **'Game Details'** which is further divided into 5 sections. To create a new game, fill the necessary game related information in these 5 different sections and click on **Save**.

New (	Game						
ame Details	Game Rules	Players	Game Badge & Rewards	Earned Points	Earned Ba	dges & Rewards	
Name this g	ame and prov	vide descri	ption				
Name	* -						
Description	-						
When you w	ant to start ar	nd end the	game?				
Start Date	* _			Ē	🖬 En	d Date	
Select type o	of game and t	ype of pla	yers you want to add this	in game			
Select Type	of Game * .				Ga	me Is Between	*

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Allowed Roles	Select Security Roles	~
	Allowed Roles	Allowed RolesSelect Security Roles

#### Section 1 – Name this game and provide description

In this section, user has to name the game and provide a brief description about the game.

Name this game and provide description							
Name	Dialing for Dollars						
Description	The team with highest no. of calls will be declared winner of this game.						

#### Section 2 – When you want to start and end the game?

In this section, user has to give the starting date and ending date for the game. The game will be played only for this period. And if the end date is not added then the game will go on.

When you want to start and end the game?		
合 Start Date ★ 4/1/2022	🔒 End Date	4/30/2022

#### Section 3 – Select the type of game and type of players you want to add in this game.

In this section, there are two fields:

- Select Type of Game: Select either of the game type Challenge, Face-off and Race.
  - **Challenge:** For Challenge game type **'End Date'** is mandatory.
  - **Face-off:** In Face-off game type '**Game is between'** field will be auto-populated with the value '**Users'**.
  - **Race:** In Race game type, a new target section will be added to the form where user has to define the target for the players.

Select type of game and	type of players you want to add this in game	
Select Type of Game *	Race	$\sim$
	Challenge	
	Face-Off	
	Race	

What target y	a want to set for the players to win the game?	
🔒 Target	* 200	

• Game Is Between: Here, the user can decide whether the game will be for individual players or it will be between teams. There are three options to select from – Fantasy teams, Teams and Users.

Game Is Between	*	Teams V	
		Fantasy Teams	
		Teams	
		Users	

 In Fantasy Teams, user can create their own team for playing games and determine the number of players to be added to each team. For example – A sales manager can create a fantasy team of five members which can include two persons each from the Sales and Marketing department and one person from the Accounting department.

Set maximum numb	er of	f players for each fantasy team	
Total Players	*	5	

 In Teams, users can create teams within the sales department such as Alpha Sales Team and Beta Sales Team, and set a common target for them to achieve.

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• In the Face-off game type, 'Users' will be automatically selected. This is because face-off is always between two individual players.

#### Section 4 – Who can join this game?

In this section, there are two fields:

- Behaviour of Game: Set the behavior (mode) of the game as Public or Private. Public games will be open to all those users who are allowed to join games. Who is allowed and who is not allowed to participate in games can be clearly defined in 'Allowed Roles'. Whereas, in Private games only manager can add players for the game.
- Allowed Roles: Define which roles are suitable for the game. This is to make sure that only a select few players holding a particular position in the organization are allowed to join the game in Public mode. If this field is kept blank then the game will be open to all the players. In Private mode, this field is not necessary.

Who can join this game?	?			
Behaviour of Game *	Public	$ $ $\vee$	Allowed Roles	
	Private			
	Public			

#### Section 5 – Allow players to join game if the Game is in-progress?

Select Yes or No. By default, this section is kept as 'No'. If yes is selected, then users can add players when the game is in-progress.



• Once the 'Game Details' is saved, move on to the next tab – Game Rules. Here click on '+New Game Rule'.

Dialing for Dollar Game	<b>°S</b> - Saved					Status Reason
Game Details Game Rules	Players Game Badg	e & Rewards Earr	ed Points Earned Badge	es & Rewards Related		
						+ New Game Rule 🖒 Refr
$\checkmark$ Name $\uparrow$ $\checkmark$	Entity Name $\checkmark$	Message $\vee$	User Field $\checkmark$	Date Field $\checkmark$	Points $\checkmark$	Actual Field Value $\smallsetminus$
create-Phone call	phonocall	0.0899	gragicahanar waat	. propialment tatle		· · · ·

Message *	
	Message

• Now in the 'Game Rule Template' field, select the game rule for the game. Here, users can either select existing game rules from the game rule template or create new game rule for the game on the spot.

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Gamifics365 –	User	Manual
---------------	------	--------

New Game Rule - Unsaved	1	
General Details		
Select a template to creat	e new game rule	
Game Rule Template	😫 Create Phone Call 🛛 🗙	Q
	Game Rule Templates	
Name this game rule ter	Add Member to Marketing List AMtML	~
Name *	Close Case CIC	~
Description	Create Account CA	$\sim$
	Create Campaign	$\checkmark$
	+ New Game Rule Template	Advanced lookup

• Once the game rule template is selected, the rest of the fields will be auto-populated with the required details. Now click on Save & Close.

	📓 Save & Close 🛛 🔊 Flow 🗸	
ew Game Rule	- Lineaved	
	Unsaved	
neral Details		
Select a template	to create new game rule	
Game Rule Templa	te 😤 Create Phone Call	
Name this game ri	ule template and provide description for game rule	
Name	* Create Phone Call	
Name Description	* Create Phone Call Give 10 points to user who creates a phone call	
Name Description	* Create Phone Call Give 10 points to user who creates a phone call	
Name Description	* Create Phone Call Give 10 points to user who creates a phone call	
Name Description	* Create Phone Call Give 10 points to user who creates a phone call	

The next tab is – **Players.** Users can add individual players or teams depending upon the game. Here, click on '+New Player' to add users or teams.

## For adding individual players:

$\leftarrow$	Ľ	🔚 Save	🛱 Save & Close	≫ Flow	$\sim$
Ne	ew Pl	<b>ayer</b> - Uns	aved		
Ge	neral	Details Ea	arned Points And	l Rewards	
	User		*		

P a g e 24 of 40

### For adding teams:

← 🗗 🖬 Save 🛱 Save & Close 🔊 Flow ∨	
New Player - Unsaved	
General Details Earned Points And Rewards	
Name of Team *	Team Players

# For adding fantasy teams:

w Player - Unsaved	
eral Details Earned Points And Rewards	5
Team Manager *	Team Players
Name of Team *	

In case of team, give appropriate name to the team and save it. After saving it, start adding users to the team by clicking on **'+New Player'**.

e Knytnms - Saved er					Dialing for Dollars Game	Owner
eral Details Earned Points And Rewards Relate	d					
Name of Team * The Rhythms	Team Players					
				+ New	Player 🖒 Refre	esh :
	$\checkmark$ Name of Player $\lor$	User 🗸	Total Points $\downarrow$ $\checkmark$	Parent Player $\checkmark$	Game $\checkmark$	
	Chotrem	Alan A	30	The Rhythms	Dialing for Doll	ars
	Nigokin	Ben B	20	The Rhythms	Dialing for Doll	ars
	Tharerin	Beret B	10	The Rhythms	Dialing for Doll	ars
	Adwirewin	Beverly B	0	The Rhythms	Dialing for Doll	ars
					14 4 D	

The last tab is – **Game Badge & Rewards**. Users can add Badges and Rewards that is to be conferred upon the winners of the game. Here, click on **'+New Game Badges/Rewards'** to add them to the game.

DF	Dialir <sub>Game</sub>	ng for Dolla	<b>rs</b> - Saved					
Game	Details	Game Rules	Players	Game Badge & Rewards	Earned Points	Earned Badges & Rewards	Related	
								+ New Game Badges/Re ひ
	<ul> <li>Existing</li> </ul>	g Badges/Rewards	$\sim$			Points $\checkmark$		
	🕈 B	ronze Badge						

Now, select the badges/rewards and define the points after earning which the user will get these badges/rewards. Click on **Save**. Once it is saved, additional sections - **Description and User Profile Description** - will automatically appear on screen in editable format. Here, user can edit the content as per their requirement which will be automatically reflected on the mobile app. For easy understanding, the content/descriptions can be updated in any language of users' choice.

🖬 🖬 Save	😭 Save & Close 🛛 🔊 Flow 🗸	
lew Game Bac	lges/Reward	
ieneral		
Select already c	reated badge or reward	
Existing Badges/Rewards	s	
Badge or Rewar	d will be applied when below points reached by any player	
Points	*	

<b>Platinum Badge</b> - s	aved
Game Badges/Reward	
General Related	
Select already create	d badge or reward
Existing Badges/Rewards	Platinum Badge
Badge or Reward wil	be applied when below points reached by any player
Delate	* rec
Points	<sup>°</sup> 120
Description	
Description Earn badge	
Description Earn badge Description	Earn this badge on 120 points.
Description Earn badge Description User Profile Descript	Earn this badge on 120 points.
Description Earn badge Description User Profile Descript User Profile	Earn this badge on 120 points.

The 'Earn Badge Description' will be shown under the Game Details screen in the Canvas app.

$\langle \rangle$	Dialing for Doll	lars			
Game Rules (1	l) Leaderboard	Badges To Earn			
	Bronze Badge Earn this badge on 60 pc	pints.			
	Silver Badge Earn this badge on 80 points.				
	Gold Badge Earn this badge on 100 p	points.			
	Platinum Badge Earn this badge on 120 p	points.			

While the 'User Profile Description' will be shown under the User Profile screen in the Canvas app.

$\bigotimes$	View Profile					
	+					
	Max Merry	Ľ				
3	9338	6				
Games Played	Points Earned	Badges				
Badges Earned	(6)					
Dialing for Dollars						
Gold Badge <mark>Ea</mark>	rned on 4/12/2022					
Di	aling for Dollars					
Silver Badge Fa	rned on 4/11/2022					

Once the game configuration is completed, click on the **'Go Live'** button on the ribbon bar.



After clicking on 'Go Live', if the present-day is the start date of the game then the status of the game will be changed to **'In progress'** and if the start date is a future date then the status of the game will be changed to **'Scheduled'**. Once the game is over, the status will be shown as **'Completed'**.

::	Dynamics 365	Gamific	s365						γ γ
=	:	÷	🛱 Show Chart 🕂 New	🗊 Delete   🗸	🖔 Refresh	🖾 Email a Link 🛛 🗸	🔊 Flow 🗸 🔟 Run Repo	rt \vee 📲 Excel Templa	tes \vee 🛛 🛚 🛚 Expo
ណ៍	Home		Active Games $\vee$						T, V
Ċ	) Recent 🗸 🗸								
\$	Pinned 🗸	~	• Name↑ ∨	Start Date $\checkmark$	End Date $\checkmark$	Select Type of Game	$\checkmark$ Behaviour of Game $\checkmark$	Game Is Between $\vee$	Status Reason $\checkmark$
м	y Work		Best Salesperson of the Mont	4/7/2022	4/21/2022	Race	Public	Teams	Draft
c	Gamifics365		Dialing for Dollars	4/1/2022	4/30/2022	Race	Private	Teams	In Progress
8 11	Leaderboards		Easter Egg Hunt	4/1/2022	4/30/2022	Race	Public	Users	Completed
Ac	dministration		Gamified cold calls	4/1/2022	4/30/2022	Challenge	Public	Users	In Progress
6	Gamifics365 Studio		Pitch scattergories	4/1/2022	4/30/2022	Challenge	Public	Fantasy Teams	Draft
e.	) Games		Sales stamina	4/1/2022	4/30/2022	Race	Public	Fantasy Teams	Draft
¥	' Badges		Selling generic products	4/1/2022	4/30/2022	Challenge	Private	Teams	Draft
2	Users		The \$2 game	5/1/2022	5/31/2022	Face-Off	Private	Users	Scheduled
Ð	Error Logs								

## **Clone Games**

For the ease of creating games, users can create a new game by cloning an existing game in the system. To clone the game, click on the **'Clone Game'** button available on the ribbon bar.

	Dynamics 365 G	amifics365 $ ho$ Q +
≡		E I Save & Close I Clone Game + New O Pause Game Deactivate I Delete C Refresh
ش (	Home	Dialing for Dollars - Saved Game
) \$	Pinned V	Game Details Game Rules Players Game Badge & Rewards Earned Points Earned Badges & Rewards Related
Му	Work	Name this game and provide description
¢	Gamifics365	Name * Dializa for Dallar
<u>a</u>	Leaderboards	Name Dialing for Dollars
Adr	ninistration	Description The team with highest no. of calls will be declared winner of this game.
¢	Gamifics365 Studio	
ē.	Games	

The game will be cloned and the user can make necessary changes such as the date, name, type of the game, and save it. And if the name of the game is kept as it is then the 'copy' word will be added to its suffix to differentiate it from the existing game.



# **Pause/Resume Games**

Gamifics365 gives provision to pause and resume ongoing games. Users can pause the game by clicking on the **'Pause Game'** button. After clicking this button the status of the game will be updated to **'Paused'**. Once the game is paused, the points of players will remain as it is. Any points earned during the period when the game was paused will not be added.

<b>Dynamics 3</b>	<b>365</b> G	Gamifics365							م	Q -	
≡		~ E 🗹	🔒 Save 🚦	<sup>3</sup> Save & Close	Clone Game	+ New	🕕 Pause Game	👌 Deactivate	🗊 Delete	🕐 Refresh	🔍 Check Acces
命 Home		Diali	ng for Dolla	ars - Saved							In Progress
C Recent	$\sim$	Game	-								Status Reasor
🖈 Pinned	$\sim$	Game Details	Game Rules	Players (	Game Badge & Re	wards Ea	arned Points Ea	rned Badges & F	Rewards Re	elated	
My Work		Name this	game and pro	vide descripti	ion						
Gamifics365		Name	*	Dialing for Doll	ars						
📠 Leaderboards		Descriptio	n	The team with l	highest no. of calls w	ill be declare	ed				
Administration				winner of this g	jame.		-				
Game Game Details Name this g	Gam game a	e Rules Play and provide de * Dialing	ers Game escription for Dollars	Badge & Re	wards Earne	d Points	Earned Badge	es & Rewards	Related		Status Reason
Descriptio	מח	The tea winner	n with highest of this game.	t no. of calls w	vill be declared						
									Р	age3	32 of 40

When the game is paused, the 'Pause Game' button will be replaced by the 'Resume Game' button. Users will have to click on the 'Resume Game' button to start the game. Once the game is resumed, points will be added when the points are scored by the players.

<b>EXAMPLE : Dynamics 365</b> Gami	ifics365 $P$ Q +
=	← 🗄 🗠 🔚 Save & Close 🖺 Clone Game + New 💽 Resume Game 🔓 Deactivate 🗊 Delete 🖒 Refresh
<ul> <li>G Recent</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>	Dialing for Dollars - Saved Game
My Work Gamifics365	Name     * Dialing for Dollars
Administration Gamifics365 Studio	Description The team with highest no. of calls will be declared winner of this game.
🛃 Games	

# **Earned Points, Badges & Rewards**

The points, badges, and rewards earned by each of the players in a particular game can be found in the **'Earned Points'** and **'Earned Badges & Rewards'** sections.

#### Earned Points:

ame De	etails G	ame Rules	Players	Game Badge & Rewards	Earned Points	Earned Badges & F	Rewards	Related			
									Ö	Refresh	龃
~	Player $\vee$			Game Rule $\vee$	Points $\checkmark$		Record URL	$\sim$		Player Point	Date
	Legelawer	ı		Create Phone Call		10	https://gar	nificsfeb01.crm.dynami	cs.co	4/11/2022	2
	Erirawiel			Create Phone Call		10	https://gar	nificsfeb01.crm.dynami	cs.co	4/11/2022	2
	Ererihan			Create Phone Call		10	https://gar	nificsfeb01.crm.dynami	cs.co	4/11/2022	2
	Jelitram			Create Phone Call		10	https://gar	nificsfeb01.crm.dynami	cs.co	4/11/2022	<u>)</u>

#### Earned Badges & Rewards:

Dialing for Dollars - Saved Game					
Game Details Game Rules Players	Game Badge & Rewards	Earned Points	Earned Badges & Rewards	Related	
					🕐 Refresh
✓ Player ∨			Game Badge/Reward $\smallsetminus$		
Craella			👷 Gold Badge		
Felaweth			Silver Badge		
Crirew			👷 Gold Badge		
Legelawen			Silver Badge		

The points and rewards earned by the individual users from the game can be found in the **'Earned Points & Rewards'** tab in the player profile.

Erirawiel - Saved Player	Dialing for Dollars Game	Owner V
General Details Earned Points And Rewards Related		
Player Points	Player Badge & Rewards	
🕐 Refresh 🗄	🕐 Refres	sh :
✓         Game Rule ∨         Points ∨         Record URL ∨         Player	$\checkmark$   Game Badge/Reward $\smallsetminus$	
Create Phone ( 10 https://gamificsfeb01.crm.dynamics.com:443/m 4/12,	🕈 Bronze Badge	
Create Phone C 10 https://gamificsfeb01.crm.dynamics.com:443/m 4/12,	🕈 Silver Badge	
Create Phone C 10 https://gamificsfeb01.crm.dynamics.com:443/m 4/12,	R Gold Badge	
Create Phone C 10 https://gamificsfeb01.crm.dynamics.com:443/m 4/11,		
1 - 4 of 6 K ← Page 1 →		
Total Points 60		
Last updated: 4/12/2022 11:05 AM		
		<u>_</u>

# Gamifics365 Mobile App

Users can keep track of the games, points, and rewards through the Gamifics365 mobile app. All the details of the ongoing games, scheduled games, and points scored, rewards won are recorded in this app.

To access this canvas app, the user will need to download the Power Apps app from the Play Store and log in using the CRM credentials (user Id and password).

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	Power Apps			₽ Search		
=			+ New a	pp $\lor  \mathscr{D}$ Edit $  \triangleright $ Play $ ec \!$	🕫 Add to Teams 🛛 Mon	nitor 🔄 Analytics (preview)
ώ	Home		Anns			
	Learn		, pp5			
₽	Apps		Apps	Component libraries (preview)		
+	Create		B	□ Name	Modified	Owner
۲	Dataverse	$\sim$		Customer Service admin center (preview)	··· 2 wk ago	SYSTEM
۵⁄ <sup>0</sup>	Flows		<ul> <li>Image: Control of the second se</li></ul>	Gamifics365	··· 1 mo ago	Max M
φ	Chatbots	$\sim$	C	Gamifics365	··· 1 mo ago	Max M
୶ୡ	Al Builder	$\sim$		Omnichannel for Customer Service	··· 1 mo ago	
	Solutions			Customer Service workspace	··· 1 mo ago	SYSTEM

Note: The Gamifics365 Admin will have to first go to make.powerapps.com and share the app with all those users who are going to use this app. The users should also have the security role of Gamifics365 User to access this app.

Now users can view the information of all the games in this app.

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	Gamifics365	
Max Merry (Ma Sales Manager	ax M)	Refresh 💍
Badges earned (73)		
Gold Badge Gold I	Badge Gold Badge Go	d Badge Gold Badg
Today		
Total points earned	d	40 40
My Live Games (4)		Refresh Rank 🦪
<u>ste</u>	Gamified cold calls	
(Users)	#5 2000 PTS.	
7 Players	No Target	Ends on 4/30/2022
<b>%</b>	Dialing for Dollars	
Race (Teams)	#2 210 PTS.	
5 Players	300 Target	Ends on 5/31/2022
^*		
Home	(¬¬) Games	Leaderboard

	Gar	nes	2
Scheduled	Li	ve	Completed
			Refresh 💍
My Live Ga	mes (2)	All Li	ve Games (1)
<u>K</u> Challenge	Gamified (	cold calls	i i
(Users)	#5	2000 PTS	
7 Players	No Ta	rget	Ends on 4/30/2022
<b>*</b>	<u>Dialing fo</u>	r Dollars	
(Teams)	#2	210 PTS.	
5 Players	300 Ta	arget	Ends on 5/31/2022
~	~		0
〔元〕 Home	Gam	) es	Leaderboard

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	Lead	erboard	$\bigcirc$
Gamified c	old calls		~
		Points	Rank
9	Legelawen	7000	1
<b>(</b>	Astes	5000	2
<b>@</b>	Adwirewin	3000	3
2	Tharerin	2500	4
2	Max Merry	2000	5
	Trun	1000	6
	Nigokin	1000	6
1 н	Come G	ames Leade	D

# Scoreboards & Leaderboards

Gamifics365 provides a perfect platform for players to view and review their performance in every game. Gamifics365 scoreboard gives a detailed analysis of the players starting with their Avatar Name, Total games participated in and the badges won. Further, it outlines the timeline of the games, when the badges

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were won and which badges can be won by the player. It also showcases the live games in which the player is currently participating. Further, it also shows the current position of the player in the game.

III Dynamics 365 Gamifics365			P Q + 7 @ 7 G
	Activities/Timeline	Your badges(6)	Badges to earn
· · · · · · · · · · · · · · · · · · ·	You have earned 10 points           Action - Orase there Call (Dailing for Dotang)           SA/2022	Bronze Pin Easter Egg Hunt	Platinum Badge Garrified cold calls
(Sales Manager)	Kow have earned 10 points     Action - Craws Phone Call (Dailing for Dailang)	Silver Pin Esster Egg Hunt	Gold Badge Gamified cold calls
er Earned points	Vou have earned 10 points	Platinum Badge Dialing for Dollars	Silver Badge Gamified cold calls
Games played	Action - Crease Phone Call (During for Dollars)	Bronze Badge Dialing for Dollars	
R Badges	Vou have earned 10 points Action - Grante Phone Call (Diating for 201am) 8/4/2022	Silver Badge Dialing for Dollars	
- 81	Games you are in (4)	TG Targ	the s2 came Certory the better part of two dollars. Learning how beliefs a Removal et : 15000 8 %

In Gamifics365 Leaderboard, users can search for the details of any Game created within Dynamics 365 CRM.

	Dynamics 365	G	amifics365	;				γ Q	+ 7	7 🕸
≡			Gamifie	ed cold calls	~	Filter With	In-Progress $\checkmark$	All Games		~
ନ ଜ	Home	~		Name	Points		Rank			
21	Pinned	,	<b>@</b>	Legelawen	7000		1			
MyW	Vork		<u>@</u>	Astes	5000		2			
6	Gamifics365		<b>@</b>	Adwirewin	3000		3			
<u>å</u> 1	Leaderboards		2	Tharerin	2500		4			
Admi	inistration		2	Max Merry	2000		5			
¢ (	Gamifics365 Studio			Trun	1000		6			
\$ \$	Games Badges		<b>(</b>	Nigokin	1000		6			
8	Users									
ą	Error Logs									
0	License Registratior	ı								

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