Contents

1 MB-220-Dynamics365forMarketing

- **Download Latest Student Handbook and AllFiles Content**
- **Are you a MCT?** - Have a look at our GitHub User Guide for MCTs
- **Need to manually build the lab instructions?** - Instructions are available in the MicrosoftLearning/Docker-Build repository

1.1 What are we doing?

- To support this course, we will need to make frequent updates to the course content to keep it current with the Power Platform services used in the course. We are publishing the lab instructions and lab files on GitHub to allow for open contributions between the course authors and MCTs to keep the content current with changes in the Power Platform.

- We hope that this brings a sense of collaboration to the labs like we've never had before - when the Power Platform changes and you find it first during a live delivery, go ahead and make an enhancement right in the lab source. Help your fellow MCTs.

1.2 How should I use these files relative to the released MOC files?

- The instructor handbook and PowerPoints are still going to be your primary source for teaching the course content.

- These files on GitHub are designed to be used in conjunction with the student handbook, but are in GitHub as a central repository so MCTs and course authors can have a shared source for the latest lab files.

- It will be recommended that for every delivery, trainers check GitHub for any changes that may have been made to support the latest Power Platform services, and get the latest files for their delivery.

1.3 What about changes to the student handbook?

- We will review the student handbook on a quarterly basis and update through the normal MOC release channels as needed.

1.4 How do I contribute?

- Any MCT can submit a pull request to the code or content in the GitHub repro, Microsoft and the course author will triage and include content and lab code changes as needed.

- You can submit bugs, changes, improvement and ideas. Find a new Azure feature before we have? Submit a new demo!

1.5 Notes

1.5.1 Classroom Materials

1.6 It is strongly recommended that MCTs and Partners access these materials and in turn, provide them separately to students. Pointing students directly to GitHub to access Lab steps as part of an ongoing class will require them to access yet another UI as part of the course, contributing to a confusing experience for the student. An explanation to the student regarding why they are receiving separate Lab instructions can highlight the nature of an always-changing cloud-based interface and platform. Microsoft Learning support for accessing files on GitHub and support for navigation of the GitHub site is limited to MCTs teaching this course only.

1.7 title: Online Hosted Instructions permalink: index.html layout: home

2 Content Directory

Hyperlinks to each of the lab exercises and demos are listed below.

2.1 Labs

{% assign labs = site.pages | where_exp:"page", "page.url contains '/Instructions/Labs'" %} | Module | Lab | | --- | --- | {% for activity in labs %}| {{ activity.lab.module }} | [{{ activity.lab.title }}{% if activity.lab.type %} - {{ activity.lab.type }}{% endif %}](/home/ll/Azure_clone/Azure_new/MB-220-Dynamics365forMarketing/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

2.2 Demos

2.3 {% assign demos = site.pages | where_exp:"page", "page.url contains '/Instructions/Demos'" %} | Module | Demo | | --- | --- | {% for activity in demos %}| {{ activity.demo.module }} | [{{ activity.demo.title }}](/home/ll/Azure_clone/Azure_new/MB-220-Dynamics365forMarketing/{{ site.github.url }}{{ activity.url }}) | {% endfor %} Starter

2.4 demo: title: 'Demo 1.1: Prepare Marketing environment' module: 'Module 1: Configure Dynamics 365 Marketing'

3 Module 1: Configure Dynamics 365 Marketing

3.1 Demo 1.1: Prepare Marketing Environment

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4 Demo Overview

4.1 Scenario

Contoso is an insurance company that has outgrown their single-send marketing software and is looking to obtain a more holistic view of their marketing efforts to help facilitate sales.

Contoso already has Dynamics 365 customer engagement apps. Because of its seamless integration, the marketing department decides to move forward with Dynamics 365 Marketing.

Contoso already has email templates they have been using in their previous software. They want to transfer their marketing assets along with their contact list to the new system.

4.2 Lab Overview

This lab compromises of two exercises:

1. In the first exercise, you will upload image files to be used in marketing pages and emails.
2. In the second exercise, you will import accounts and contacts to Dynamics 365 Marketing from csv files.

4.3 What you'll need:

- A computer or VM with a Dynamics 365 Marketing environment
- 10 image files to be used in marketing content and 2 csv files containing Contoso contact and account data. These can be found in the AllFiles folder on GitHub, or may be distributed directly by your MCT.
  - briefcase.png
  - contosologo.png
  - facebook.png
  - flood.png
  - heroemail.jpg
  - heropage.jpg
  - linkedin.png
  - safebox.png

- travel.png
- twitter.png
- Contoso Accounts.csv
- Contoso Contacts.csv

5 Exercise 1: Upload marketing content

Contoso wants to use the same images from their current system. To so do, you will need to upload the marketing assets to Dynamics 365 Marketing.

1. Download the image files from the resource documents. Extract the files to a folder on your desktop.
2. Navigate to <office.com> and sign in with your **admin** credentials.

Important: Please be aware that this tenant and the Dynamics 365 organization will be shared with the students in your classroom, like employees would share a tenant when using the Dynamics 365 instance belonging to their organization. Discourage students from using any PII (personally identifiable information) when creating records. This exercise should **only be completed by the MCT using the admin credential.**

3. Expand the side menu and select **Dynamics 365.** From the list of available apps, select **Marketing** to open the Dynamics 365 Marketing app.
4. The Marketing app will open. In the left menu, navigate to **Files** in the Marketing Content section. Click the **+ Upload** button to open the upload files window. Click **+ Add files**, locate the files on your local computer, and select them.
5. While the upload window is open, add the keywords "logo" and "contoso" to the contosologo image file. Since this is a new system, keywords will need to be created instead of selected. When you're done adding keywords, finish the upload.
6. Ensure 10 images files uploaded.
7. Using the search bar, type "con" and hit enter. Ensure the Contoso logo appears in the search results.
8. These files will now be available for all the users to incorporate into their marketing operations.

5.1 lab: title: 'Lab 1.1: Validate lab environment' module: 'Module 1: Configure Dynamics 365 Marketing'

6 Module 1: Configure Dynamics 365 Marketing

6.1 Practice Lab 1.1 - Validate lab environment

6.2 Scenario

In this Module 0 lab, you will validate that your classroom tenant is working as expected. You will access your individual credentials, record your "alias", and open the Dynamics 365 model-driven application that we will be using throughout the course.

Important Note: This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. Please be aware that the Power Platform is evolving all the time. The instructions in this document may be different from what you experience in your actual tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

6.3 Exercise 1 - Access the Dynamics 365 application

6.3.1 Task 1 – Log into the admin center

1. Access **office.com** and log in with your user credentials.
2. Record your user credential up to the @ symbol on a scratch piece of paper or in Notepad. This will be your lab alias that you will use to differentiate the data you create within the shared Dynamics 365 organization.

Important: Please be aware that this tenant and the Dynamics 365 organization will be shared with the other students in your classroom, like employees would share a tenant when using the Dynamics 365 instance belonging to their organization. Do not use any PII (personally identifiable information) when creating records. It is also good practice to use your username prefix (ex., **mollyc**) in front of all records, data, apps, flows, etc. you create.

3. Feel free to explore the Power Platform admin center but **do not make any changes.**

6.3.2 Task 2 – Access the Dynamics 365 application

1. Expand the grid button at the top left of the screen. Scroll to the bottom of the list.
2. From the list of available applications, select **Marketing.**
3. The Dynamics 365 Marketing application will open.
4. Spend a few minutes exploring the application but do not make any changes.

6.4 lab: title: 'Lab 2.1: Work with segments' module: 'Module 2: Manage segments and lists'

7 Module 2: Manage segments and lists

7.1 Practice Lab 2.1 - Work with segments

8 Lab Overview

8.1 Scenario

As Contoso continues preparing their nurture campaign, they need to define the audience that will participate in the customer journey.

8.2 Lab Overview

This lab compromises of three exercises:

1. In exercise one, you will create a contact and create a dynamic segment that will pull those contacts.
2. In exercise two, you will create two segments – one of your competitors and another one to pull in all contacts from the southwest except your competitors.
3. In exercise three, you will create and configure a subscription center page and update the system content settings.

8.3 What you'll need:

- A computer with a Dynamics 365 Marketing environment

9 Exercise 1: Create a dynamic segment

Contoso wants to target contacts who live in the southwest. You previously uploaded a list of contacts into the system. Now you need to create a segment pulling in specific contacts. The segment is what will be used in the customer journey to interact with your intended audience.

1. Log into Dynamics 365 Marketing.
2. Navigate to **Contacts** in the left menu, in the **Customers** group. Click **+New.** For **First Name**, enter your alias. For **Last Name**, enter **Test.**
3. In **Address 1: State/Province**, enter California, Arizona, or Texas. Fill in the other fields with fictional information (as many as you'd like). Do not enter any personally identifiable information.
4. Click **Save and close.** You should be able to see your new contact record in the view.

5. Navigate to **Segments** in the left menu, in the **Customers** group. Select **+New** and choose **+New Dynamic Segment.**
6. When prompted to select a Segment Template, click **Skip.**
7. In the **Definition** tab, name the segment [**my prefix**] **Contoso Southwest Segment**.
8. Select **Add Query Block.** (If a pop-up appears, close it.) In the first field, the entity **Contact** should be selected. If it is not, change the query entity to Contact. Add the following statements:
   - Address 1: State/Province **equals** California
   - Click +Add and select **Add condition to Contact** using **OR**
   - Address 1: State/Province **equals** Arizona
   - Click +Add and select **Add contion to Contact** using **OR**
   - Address 1: State/Province **equals** Texas
9. Save and check for errors. Correct any if needed.
10. Go live.
11. Give the system time and refresh if needed. After a few minutes, reopen the segment and navigate to the **Members** tab. Ensure the contact you created earlier in the exercise is listed in the view.

10 Exercise 2: Create a segment using union, exclude, or intersect logic

During further analysis of the contacts, it was found that a few are from a competitive company, Relecloud. You will want to create a dynamic query pulling in anyone that comes from Relecloud. You then want to create a new segment using the exclude logic to make sure these contacts are not included in your customer journey.

2. Click **Segments** in the left menu to return to the main segment view.
   - Create a new segment by clicking **+New** and selecting **+New Dynamic Segment.**
   - When prompted to select a template, click **Skip.**
   - Name the segment [**my prefix**] **Relecloud Suppression Segment.**
3. Generate a statement so that the Contact's Account is Relecloud And Contacts All.
   - Click **Add Query Block.** (If a pop-up appears, close it.)
   - **Contact** should be selected as the query entity.
   - Create the following condition: Company Name **equals** Relecloud.
   - Save and check for errors. Correct any if needed.
   - Go live.
4. Create a segment for all your southwest contacts except your competitors.
   - Return to the main segment view by clicking **Segments** in the left menu. Create a new segment by clicking **+New** and selecting **+New Dynamic Segment.**
   - When prompted to select a template, click **Skip.**
   - Name the segment [**my prefix**] **Contoso Southwest Excluding Competitors Segment**.
   - Select **Add segment block.**
   - Start by typing your prefix into the Segment field. Select the [**my prefix**] **Contoso Southwest Segment** segment from Exercise 1.
   - Click **Add Segment Block** again. Change the modifier to **but not**. Start typing your prefix into the field and select the [**my prefix**] **Relecloud Suppression Segment** segment.
   - Save and check for errors. Correct any if needed.
   - Click on the **Members** tab. You should see contacts from the selected states, but no members of the Relecloud company.

11 Exercise 3: Create subscription center page and update system content settings

Since Contoso is new to Dynamics 365 Marketing, you will need to create a subscription center page for anyone to be able to opt out of communications from Contoso.

1. From the left menu, select **Subscription lists** from the **Customers** group.
2. Select **+New subscription list.**
   - Name the list **[my prefix] Contoso Subscription List**.
   - Click **Save.**
3. Add the subscription list to a subscription form.
   - Navigate to **Marketing Forms** under the **Internet marketing** group. Create a new form using the heraklion template.
   - Click the **Summary** tab. Name the form **[my prefix] Contoso Subscription Form**. From the header, ensure the type is subscription center and that only contacts are updated.
   - Return to the **Designer** tab. Update the header to: "Please update your preferences below." Center align and change the font to Segoe UI.
   - Update the font for First Name, Last Name, Phone, and Email to Segoe UI.
   - Make First Name, Last Name, and Email required.
   - From the Toolbox, drag the **[my prefix]] Contoso Subscription List** above Do not email. Change the Label to Contoso Newsletter and select prefill. Change the font of Contoso newsletter and do not email to Segoe UI.
   - Remove [Update subscriptions heading].
   - Save and check for errors. Correct any if needed.
   - Go live.
4. Create a new marketing page.
   - Navigate to **Marketing pages** from the Internet marketing group. Click **+New**. When prompted to select a template, click **Skip.**
   - Click the dropdown in the upper right corner. Name the page **[my prefix] Contoso Subscription Page** with a type of subscription center and enter the partial URL as **[myprefix]subscription**. It should look like the following: **mollycsubscription.**
   - Drag and drop an Image block. With the image block selected, click the magnifying glass icon under **Image source** in the Properties tab. Select **Contoso logo** and ensure that **Center** is selected for **Alignment**.
   - Return to the **Toolbox** tab. Drag and drop a Form block below the image. Start by typing in your prefix into the search box and select the **[my prefix] Contoso Subscription Form** you just created. Input the following:
     1. Success notification: Thank you. Your submission has been received.
     2. Error message: Something went wrong. Please try again.
     3. Redirecting URL: http://www.contoso.com
   - Save and check for errors. Correct any if needed.
   - Go live. (If you recieve a pop-up, click OK.)
5. Update content settings.
   - Navigate to **Content Settings** in the Templates group and select the default content settings record. You will need to stop the entity record before you can update. Add the following:
     1. Address main: 4567 Main St. Seattle, WA 98052
     2. LinkedIn URL: https://www.linkedin.com/company/contoso12345/about/

3. Twitter URL: https://twitter.com/ContosoInc
4. Facebook URL: https://www.facebook.com/Contoso-102137176602590/
5. Subscription center: Use the edit assist option to select the Contoso Subscription Page you just created. Be sure to select the FullPageURL.

- Save and check for errors. Correct any if needed.
- Go live.

11.1 lab: title: 'Lab 3.1: Create marketing forms and pages' module: 'Module 3: Manage marketing forms and pages'

12 Module 3: Manage marketing forms and pages

12.1 Practice Lab 3.1 - Create marketing forms and pages

13 Lab Overview

13.1 Scenario

Contoso would like to set up a nurture campaign to entice current and potential customer to request a quote. In order to do so, they must start by creating the components that make up the nurture campaign.

The nurture campaign will include sending an email outlining the company's expertise to increase their contacts' knowledge of what Contoso has to offer. The goal is to get them to request an insurance quote.

In order for them to request a quote, Contoso needs a form for current and potential customers to fill out and a page to host the form.

13.2 Lab Overview

This lab compromises of three exercises:

1. In exerise one, you will create a marketing form.
2. In exercise two, you will create a marketing page and embed the marketing form on the page.

13.3 What you'll need:

- A computer with a Dynamics 365 Marketing environment

14 Exercise 1: Create a marketing form

You need to start by creating a form for leads to fill out in order to request an insurance quote. This form will be hosted on a marketing page.

2. Navigate to **Marketing forms** in the left menu in the **Internet marketing** group. Create a new form.
3. From the template gallery, select **argos**.
4. Click the **Summary** tab. Name the form [**my prefix**] **Contoso Request a Quote Form**. In the upper right corner, confirm the Form Type is **Landing page** and that it is set to update **Contacts and leads.**
5. Save your changes.
6. Return to the **Designer** tab. In the form heading, type "Please fill out this form for an agent to contact you." and change the font size to **20**.
7. Since we already know where these leads came from, you can delete the "How did you hear about us?" field by selecting the field and clicking the **trash** icon. In its place we want to add an Industry field to know which agent to assign to the lead. Select the field from **Toolbox** on the right and drag and drop it above the submit button.
8. Make the following updates:

- First Name: required / prefill / change font to Segoe UI
- Last Name: required / prefill / change font to Segoe UI
- Email: required / prefill / change font to Segoe UI
- Phone Number: required / prefill / change font to Segoe UI
- Company Name: required / change font to Segoe UI
- Number of Employees: required / change font to Segoe UI
- Job Title: required / change font to Segoe UI
- Industry: required / set the default value to Consumer Services / change font to Segoe UI

9. Preview the form by sleecting the **Preview** button at the top of the form designer underneath the tabs.
10. Save and check for errors. Correct any if needed.
11. Go live.

15 Exercise 2: Create a marketing page and embed a form

Next, you need to create a marketing page to host the form you created in Exercise 1. This is where you will direct leads to request a quote.

2. Navigate to **Files** from the **Marketing content** group in the left menu.
3. Open the heropage.jpg image by selecting the file name. Locate the URL field. Copy the URL and paste in a place you can access later.
4. Navigate to **Marketing pages** from the **Internet marketing** group and create a new page.
5. From the template gallery, select **marbella.**
6. Click the **Summary** tab. Name the page **[my prefix] Contoso Request a Quote Page**. Expand the carrot next to **Draft** in the upper right corner. Confirm this page is designated as a landing page and enter **[myprefix]quote** in the partial URL field. (It should look like the following: **mollycquote**.)
7. Save your changes.
8. Return to the **Designer** tab. Select the top image block. Navigate to the Image Gallery, which is located in the two icons that pops up as you select the image. Locate and select the contosologo image. In the properties, set the width to 250px.
9. Select the background of the marketing page to deselect the image and return to the general Properties tab.
10. In the Hero image field, paste the URL you copied for heropage.jpg. Click out of the field and ensure the hero image now appears instead of the placeholder.
11. In the same tab, change Color 1 to #E2E2E2 and Color 5 to #666666. Change Inner background and Form background color to #F5F5ED.
12. Remove Book Pro 360 from the page by selecting the text block and selecting the **trash** button.
13. Add a divider where the Book Pro 360 text block was by dragging the **Divider** box from the **Toolbox**. Once the divider is placed and selected, switch to the **Properties** tab. Change the color to #F5F5ED and the **padding top** to 20.
14. Change "Content of the Guide" to "Things to Consider When Buying Business Insurance:".
15. Replace the bullets with the following:
    - Do you create and sell a product?
    - Do you have employees?
    - Do you have one or more company vehicles?
    - Do you have one or more office locations?
    - Do you offer a service to customers?

16. Select the button block and delete.
17. Click the form block. In the Marketing form field, begin typing **your prefix** and select the form you created in Exercise 1. If your form does not appear, save your marketing page and navigate to your form to ensure it is in live status.
18. Input the following:
    - Success notification: Thank you. Your submission has been received.
    - Error notification: Something went wrong. Please try again.
    - Redirect URL: http://www.contoso.com (You must include this full URL.)
19. Scroll down to the next section. Change “In this complete guide you’ll see” to “Contoso offers insurance for all your business needs”.
20. In the four image boxes below, add the following images that we uploaded in Lab 1 along with alt text describing the image:
    - safebox.png / alt text: cyber liability insurance
    - flood.png / alt text: flood insurance
    - briefcase.png / alt text: business income insurance
    - travel.png / alt text: travel insurance
21. Update the @ Title Name below each image to the following:
    - Cyber Liability
    - Flood
    - Business Income
    - Travel
22. Delete all $ xx.xx text boxes.
23. Save your changes.
24. Below Frequently **Asked Questions,** replace the questions and sample text with the following:
    - How much does business insurance cost?
    - There is no one-size-fits all answer, but we can offer ballpark ranges. Click through to find out what similar businesses typically pay.
    - What does General Liability Insurance cover?
    - General Liability Insurance can help cover legal expenses when your business is sued over third-party bodily injuries, property damage, and more.
    - Why do I need Professional Liability Insurance?
    - Unhappy clients may bring frivolous lawsuits against your company. And even if your client doesn’t win, the cost of defending yourself can be prohibitive.
25. In the bottom footer area, select the left image block. Add the contosologo. Change the width to 150.
26. In the three social link image blocks, add social media image icons and link them to your social media profiles. Note: You will need to double click the social link boxes to be able to select the image and edit the details. After you have added the image and details, click each image to locate the link option.
    - 1st social link box will be Facebook. Source: facebook.png / Alt text: Facebook logo / Width: 50 / Height: 50. Click Ok. Update the link to: https://www.facebook.com/Contoso-102137176602590/. Click OK.
    - 2nd social link box will be Twitter. Source: twitter.png / Alt text: Twitter logo / Width: 50 / Height: 50 / . Click OK. Update the link to: https://twitter.com/ContosoInc and click OK.
    - 3rd social link box will be LinkedIn. Source: linkedin.png / Alt text: LinkedIn logo / Width: 50 / Height: 50 / . Click Ok. Update the link to: https://www.linkedin.com/company/contoso12345/about/ Click OK.

27. Change the copyright information at the bottom to the current year and Contoso.
28. Preview the page.
29. Save and check for errors. Correct any if needed.
30. Go live.
31. Navigate to the Summary tab and open the full page URL to view your page. It may take a moment for all content to appear.
32. If you would like to make changes, stop the page, make your updates, check for errors and go live again.
33. Fill out the form using the following details. After you submit, ensure your confirmation message appears and your redirecting URL works.
    - First Name: [my prefix]
    - Last Name: Stark
    - Email: [my prefix]@adventureworkscycles.com
    - Phone: 555-123-9876
    - Company: Adventure Works Cycles
    - Number of Employees: 150
    - Title: Marketing Manager
    - Industry: Entertainment Retail
    - Submit
34. After you submit, ensure your redirecting URL works based on the details you added in step 19.
35. Return to Dynamics 365 Marketing and select **Leads** from the **Lead management** group. You should see the **[my prefix] Stark** lead in the view. (It may take a few minutes to show up. Refresh the page after a few minutes if your lead is not showing.)

15.1 lab: title: 'Lab 4.1: Lead scoring' module: 'Module 4: Manage leads, accounts, and contacts'

16 Module 4: Manage leads, accounts, and contacts

16.1 Practice Lab 4.1: Lead scoring

17 Lab Overview

17.1 Scenario

Contoso has several new marketing initiatives for the year. One of those includes upselling insurance to existing customers. In order to target their audience and send the appropriate customers to sales, they want to create a lead scoring model based on demographic data.

17.2 Lab Overview

This lab compromises of one exercise:

1. In this exercise you will create a lead scoring model to score leads based on demographic data.

17.3 What you'll need:

- A computer with a Dynamics 365 Marketing environment

18 Exercise 1: Create a lead scoring model for demographic data

Contoso is interested in expanding their services to specific industries in the southwest region. You will need to create a lead scoring model that will increase scores based on industry and state.

The scoring model will be on a grading scale of 1-100 as follows:

- 0-24 - Cool
- 25-59 - Warm
- 60-99 - Hot

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1. Log into Dynamics 365 Marketing.
2. Navigate to the Lead Management section in the left menu and select **Scoring Models**. Click +New.
3. Switch to the **Summary** tab. Name the model **[my prefix] Contoso Southwest Outreach Model**. Set the target to **Contact** and save.
4. Switch back to the Design tab. On the right, navigate to **Grades**. Input 100 as your sales ready score. Add three new grades:
   - **Cool:** 0-24
   - **Warm:** 25-59
   - **Hot:** 60-99
5. Navigate to the **Toolbox**. Drag a **Condition** onto the canvas. Name the condition **Industry Demographic.**
6. On the condition tile, select the arrow down button to expose the child condition. Select the child condition and name it Industry. In the entity field, select Lead. Add the following expression:
   - Industry = Business Services
   - **Note:** You may have the option to select from two Industry fields. Pick the one that has Values as option sets, not empty fields.
7. Navigate back to the toolbox and add an Action to the right of the Industry Demographic condition. In the action, increase the score by 15.
8. In the toolbox, drag a new condition below Industry Demographic and name it Texas Demographic.
9. On the condition tile, select the arrow down button to expose the child condition. Select the child condition and name it Texas State.
10. Since our state field lives on the contact level, we will have to make a transcendental jump from lead to contact. In the entity field, type Lead and select it. Add a period and then select Parent contact. Your entity field will look like this: **Lead.Parent contact**. Add the following expression:
    1. Address 1: State/Province = Texas
11. Navigate back to the toolbox and add an Action to the right of the Texas Demographic condition. In the action, increase the score by 25.
12. Save and check for errors. Correct any as needed.
13. Go live.

18.1 lab: title: 'Lab 5.1: Create and distribute a marketing email' module: 'Module 5: Manage marketing emails and customer journeys'

19 Module 5: Manage marketing emails and customer journeys

19.1 Practice Lab 5.1

20 Lab Overview

20.1 Scenario

Contoso wants to send an email to their current contacts in hopes of enticing them to request a quote for a new service. They want to encourage them to visit their marketing page and fill out the request a quote form.

20.2 Lab Overview

This lab compromises of one exercise:

1. In this exercise you will create an email that encourages recipients to visit your marketing page and request a quote for insurance.

20.3 What you'll need:

- A computer with a Dynamics 365 Marketing environment

21 Exercise 1: Create an email from a template

1. Log into Dynamics 365 Marketing.
2. Navigate to **Marketing emails** in the **Marketing execution** group. Create a new email using the gairo template.
3. In the upper right corner, select the dropdown carrot and name the email [**my prefifx**] **Contoso Request a Quote Email**. Type the following in the subject line: "Contoso offers your business protection when you need it".
4. From the designer, change the text in the preheader at the top left from "Thanks for joining us!" to "Request a quote today!"
5. Select the main image on the designer. Open Image Gallery and select the heroemail image.
6. Select the 200 x 80 image block below the hero image. Navigate to the Image Gallery and select the contosologo. Change the height to 70 and center align.
7. Change the header in the body of the email to "Business protection when you need it." Change the font size to 24 and center align. Note: If you copy and paste, the formatting may change. You may want to type the new text instead of copy and paste.
8. Change the body to "We can help you build and protect your business by providing customized insurance solutions to support you and your budget." Change the font size to 20 and center align. Reminder: If you copy and paste, the formatting may change. You may want to type the new text instead of copy and paste.
9. Select the button and change the text to "Request a Quote".
   - In the properties, change the background color to #31459c, center align and change the width to 220.
   - In the link field, select the </> icon and click **Static content** in the pop-up.
   - Select **MarketingPage** as the entity.
   - In the field, start typing your prefix. Select [**my prefix**] **Request a Quote Page.**
   - Select **No relationship (select a field from MarketingPage)** and choose **msdyncrm__full__page__url.**
   - Finally, press **Insert.**

10. Remove the text below the button.
11. Update the copyright to this year and change the company to Contoso.
12. Preview the email.
13. Save and check for errors. Correct any if needed.
14. Go live.

21.1 lab: title: 'Lab 5.2: Create and launch a customer journey' module: 'Module 5: Manage marketing emails and customer journeys'

22 Module 5: Manage marketing emails and customer journeys

22.1 Practice Lab 5.2

23 Lab Overview

23.1 Scenario

Now that all the components have been created, Contoso is ready to execute their marketing campaign to nurture their existing contacts and acquire new customers. You now need to create a customer journey and bring in all the marketing elements created in previous labs. You will also update the lead scoring model you created earlier to also score on interaction data.

23.2 Lab Overview

This lab compromises of three exercises:

1. In exercise one, you will create an outbound customer journey utilizing all the marketing components you created in the previous labs.
2. In exercise two, you will update the lead scoring model created in Lab 4 to include interaction data.
3. In exercise three, you will launch your outbound customer journey.

23.3 What you'll need:

- A computer with a Dynamics 365 Marketing environment

24 Exercise 1: Create an outbound customer journey

You will need to create a new customer journey. Within the customer journey, you will add a segment, which defines the audience that will be targeting by journey along with the marketing email that directs contacts to the marketing form and page you created.

1. Log into Dynamics 365 Marketing.
2. Navigate to **Customer journeys** from the **Marketing execution** group. Click **+New**. When prompted to select a template, click **Skip.**
3. Click the dorpdown carrot in the upper right corner. Name the journey **[my prefix] Contoso Request a Quote Journey**. Select today as a start date and 4:00 PM as the time. Set recurring as no.
4. Switch to the General tab. Ensure target is set to contact. Select an end date as a month from the start date.
5. Save your changes.
6. Switch back to the Designer tab.
7. Define the audience for the journey.

- Select the plus sign above **Set your audience** in the first box in the designer.

- In the audience pane on the right, ensure Source Type = **Segment**, Segment = **Segment**, and that **Inclusion** is selected. In the Segment field, start typing your prefix and select [**my prefix**] **Contoso Southwest Excluding Competitors Segment**.

8. Set the date and time for the email to send. Select the plus sign between the **Start** and **End** nodes. In the **Wait for** pane on the right, select the following:
   - Duration: One week
   - Day of week: Weekdays (can use quick select or uncheck Saturday and Sunday)
   - Time of day: Mornings
9. Set up an email to send via the journey.
   - Select the plus sign between the **Wait for** and **End** nodes.
   - From the dropdown, select **Send an email.**
   - In the **Send an email** pane on the right, type your prefix into the field and select **alans Contoso Request a Quote Email.**
   - Expand the **Email elements** tab and select **+ Add item.** Select **Page** from the dropdown.
   - Type in your prefix into the field and select [**my prefix**] **Contoso Request a Quote** page.
   - Click **+Add item** again and select **Form.**
   - Type in your prefix and select [**my prefix**] **Contoso Request a Quote** form.
   - Expand the **Schedule** tab.
   - Using Quick Select, select **Weekdays.**
   - Using Quick Select, select **Mornings.**
10. Add a condition.
    - Between the **Send an email** and the **End** node, click the plus sign.
    - Select **If/Then.**
    - In the **Select a source** field, select [**my prefix**] **Contoso Request a Quote Form.** In the **Select a condition** field, select **have registration.**
    - Ensure that 1 hour is selected in **Wait up to.**
11. Set up the Yes/No branches for the condition.
    - In the **Yes** branch, click the plus sign. Select **Phone call**.
    - In the **Phone call** field, select **+New Phone-call activity marketing template.**
    - For **Name**, write [**my prefix**] **Requested Quote Follow-up.**
    - For **Subject**, write **Customer requested a quote.**
    - Set **Schedule type** to **Delay (in days)** and enter 0 for **Start delay.**
    - For **Start time**, enter 1 for **Hour.**
    - Click **Save and close.**
12. Save the customer journey and check for errors.
13. Go live.

25 Exercise 2: Update lead scoring model with interaction data

The lead scoring module you created in Lab 2 scored contacts based on demographic data. Now that the marketing page and customer journeys have been created, you can update the scoring model to also score on interaction data.

Note: In this exercise, you will need to the record IDs for the customer journey and marketing page you created in previous exercises. You will need to navigate to each item and copy and paste the ID somewhere you can easily reference it. You can find the ID by navigating to the item and reviewing the URL. The ID follows &id= towards the end of the URL.

Example customer journey URL: https://<orgname>.crm.dynamics.com/main.aspx?appid=6fd89d4b-06b5-e811-a972-00d3af34c4b&pagetype=entityrecord&etn=msdyncrm_customerjourney&id=34e63989-683f-e911-a987-000d3af3d307

Example customer journey ID: 34e63989-683f-e911-a987-000d3af3d307

1. Log into Dynamics 365 Marketing.
2. Navigate to **Scoring Models** in the **Lead management** section of the left menu. Open the [**my prefix**] **Contoso Southwest Outreach Model** you created in Lab 2.

3. Click stop from the command bar. Click OK in the pop up. Wait until the status reason has changed from Stopping to Draft. This may take several minutes. You can check the status by clicking the **Refresh** button in the command bar.
4. Add a score for completing the customer journey.
   - Drag a condition from the Toolbox below Southwest Demographic. Name the condition Journey Completed.
   - On the condition tile, select the arrow down button to expose the child condition. Select the child condition and name it Journey Completed.
   - In the entity field, select **Customer Journey.**
   - Set the frequency to each and the date range of a lifetime.
   - Use the lookup field to select the customer journey value.
   - From the Toolbox, drag an action to the right of the Journey Completed condition and increase the score to 100.
5. Add score for opening an email.
   - From the Toolbox, drag a condition below Journey Completed. Name the condition Email Opened.
   - On the condition tile, select the arrow down button to expose the child condition. Select the child condition and name it Email Opened.
   - In the entity field, select Email opened.
   - Set the frequency to each and the date range of a lifetime.
   - Delete the expression box.
   - From the Toolbox, drag an action to the right of the Email Opened condition and increase the score to 5.
6. Add a score for clicking on an email.
   - From the Toolbox, drag a condition below Email Opened. Name the condition Email Clicked.
   - On the condition tile, select the arrow down button to expose the child condition. Select the child condition and name it Email Clicked.
   - In the entity field, select Email clicked.
   - Set the frequency to each and the date range of a lifetime.
   - Delete the expression box.
   - From the Toolbox, drag an action to the right of the Email Clicked condition and increase the score to 10.
7. Add a score for a page visit.
   - From the Toolbox, drag a condition to the canvas below Email Clicked. Name the condition Page Visited.
   - On the condition tile, select the arrow down button to expose the child condition. Select the child condition and name it Page Visited.
   - In the entity field, select Website visited.
   - Set the frequency to each and the date range of a lifetime.
   - In the Expression 1 box, set the following:
     1. Field: Page Address
     2. Operator: =
     3. Value: Copy and paste the ID of the marketing page you created in Lab 3 Exercise 2
   - From the Toolbox, drag an action to the right of the Page Visited condition and increase the score to 25.
8. Save and check for errors. Correct any as needed.

9. Go live.

26 Exercise 3: Go live with the customer journey

Now that you have updated the lead scoring model, you are ready to kick off the customer journey.

1. Log into Dynamics 365 Marketing.
2. Navigate to **Customer journeys** in the **Marketing execution** section of the left menu.
3. Select the [**my prefix**] **Contoso Request a Quote** customer journey you created in Exercise 1.
4. Click go live from the command bar.

26.1 lab: title: 'Lab 6.1: Create an event' module: 'Module 6: Manage events'

27 Module 6: Manage events

27.1 Practice Lab 6.1

28 Lab Overview

28.1 Scenario

Contoso is hosting an annual conference.

You need to create an event record in Dynamics 365 Marketing and start filling out all the planning information regarding the event. The event is happening on site only and has 150 seats available. The waitlist is allowed and for each available spot, 10 invitations will be sent out. When additional seats are available, you want waitlisted contacts to be registered automatically.

There are two guest speakersn. This is a free event and guests will need to accommodate their own stays.

The event registration will be done via the event portal. You want to add pictures of the speakers. Dinner is provided so you want to add a custom registration field for meal choice. The field may be a single choice field with Chicken, Fish, and Steak options.

28.2 Lab Overview

This lab comprises of one exercise:

- In the exercise, you will create an in-person event from scratch.

28.3 What You'll Need

- A computer with a Dynamics 365 Marketing environment
- 2 image files for upload:
  - emmalowtonprofileimage
  - percybowmanprofileimage

29 Exercise 1: Create an in-person event

1. Download the image files from the resource documents.
2. Log into Dynamics 365 Marketing.
3. Create a new building.
   - Expand the menu at the bottom of the left sidebar that reads **Marketing**. Switch to the **Events** area.
   - Select **Buildings** from the **Venue management** section.

- Enter the venue name as **[my prefix] Convention Center**. Add the estimated capacity as 150.
- Add the following details on the Address section:
    1. Address line 1: 1234 Parkway Ave
    2. City: Minneapolis
    3. Postal Code: 81940
    4. State/province: Minnesota
- Save the building record.
- Click on the Rooms tab. Create a new room.
- Enter the room name as **[my prefix] North Conference Room**. Add the capacity as 150.
- Save and close the room record.

4. Create a new event.
    - Navigate to **Events** in the **Events** section of the left menu. Select **+New.**
    - From the General tab, update the following information based on the event invitation.
    - In the Key information section add the event name as **[my prefix] 10th Contoso Conference.** Specify type as **Conference**.
    - In the Schedule section, add the event time zone as **Pacific**, event start date as a month from today, and event end date as a month from today + 2 days.
    - In the Location section, add the building and room you created in step 2. (To find it easily, you can start by typing in your prefix.)
    - In the Venue constraints section, verify the capacity and update the waitlist for this event field to Yes.
    - In the Waitlist section, update the number of invitations per slot as **10** and automatically register waitlisted contacts per the invite.
    - Save the event record.
5. Add sessions and speakers to the event.
    - Navigate to the Agenda tab and add the following sessions. Note that the area you add sessions is below the session calendar. Use the outer scroll to navigate.
        1. Session 1 / 6:30 PM-8:30 PM / [my prefix] Convention Center / [my prefix] North Conference Room
        2. Session 2 / 8:30 PM-10:30 PM / [my prefix] Convention Center / [my prefix] North Conference Room
    - Create two new speaker engagements. When you create a new speaker engagement, you will need to name the record and then create a new speaker. Both speakers are external. Create the speaker records using your prefix (for example, **[my prefix] Percy Bowman.**) Percy Bowman's email is pbowman@adatum.com and Emma Lowton's email is elowton@adventure-works.com. Percy will be speaking at the first session and Emma will be speaking at the second. Be sure to associate each speaker with the appropriate session.
    - After adding the speaking engagement, open each speaker's record and add their profile images.
6. Create custom registration fields and publish the event.
    - Navigate to the Registration and attendance tab. Create a new event custom registration field with the given meal choices from the scenario.
    - Save the event record.
    - Set the event publish status to Live.
7. Navigate to the event URL. Verify the conference details are correct, the sessions are listed, and speaker images are visible.