Dynamics 365 Marketing

GETTING STARTED GUIDE

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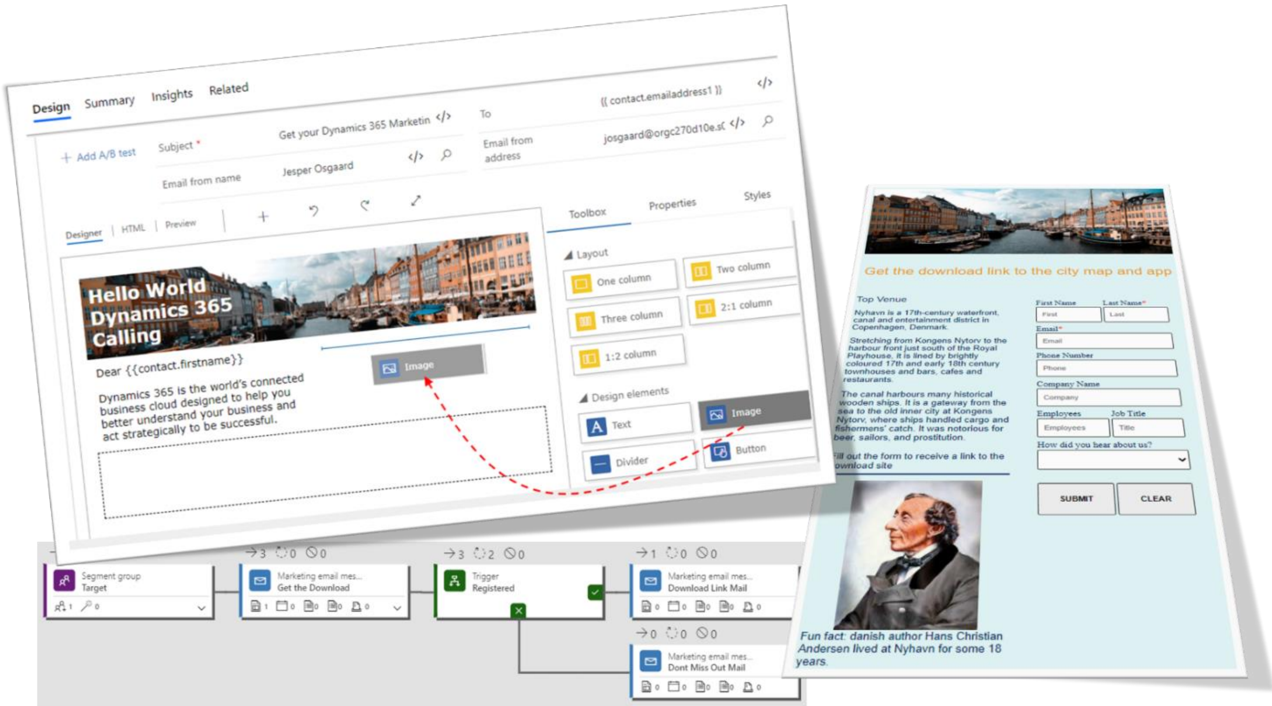
Intro

This guide is intended to walk you through a series of exercises helping you to get started with the Dynamics 365 Marketing app.



Dynamics 365 Marketing

Growing businesses need more than basic email marketing tools to turn their prospects into business relationships.

Dynamics 365 Marketing is available for organizations seeking a marketing automation solution that tightly integrates with your Dynamics 365 system to allow transfer of lead information seamlessly between marketing and sales, ensuring you present the right messages at the right time and guide leads to the next best action.

Dynamics 365 Marketing is designed to help companies nurture more sales-ready leads, align sales and marketing and make smarter decisions. Most importantly, Dynamics 365 Marketing works together with Dynamics 365 Sales on the same platform which aligns teams with common data, connected processes and Office 365 collaboration tools.

With Dynamics 365 Marketing, marketers can seamlessly:

- Generate more leads from multi-channel campaigns across email, marketing pages, webinars, phone calls, in person events, LinkedIn and more. New customizable templates for emails and marketing pages help you create campaign content quickly. And with a dedicated email marketing service, you can get the word out reliably.
- Target the right audience using embedded intelligence capabilities like dynamic segmentation. With multiple lead scoring models, you can prioritize the leads that are ready to buy. Automated insights can help you track how your leads are engaging during your campaigns.
- Organize events with ease using the event portal to manage in-person events and integration with webinar providers.
- And more…..

See also	https://dynamics.microsoft.com/en-us/marketing/overview

Documentation and Learning

For reference you can find an extensive set of documentation and learning paths on docs.microsoft.com

Documentation

Guides for users, administrators, and developers – and more:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/marketing/help-hub

Learning

Learn new skills and discover the power of Dynamics 365 Marketing with step-by-step guidance:
https://docs.microsoft.com/en-us/learn/browse/?products=dynamics-marketing

Trial

If you need to spin up a Dynamics 365 Marketing trial (e.g. for working with the exercises in this guide) please refer to the steps in "Appendix A: How to Trial" at page 107

Introduction to the labs

In the first three labs we will build the required components to do an initial test of Dynamics 365 Marketing – send out a marketing email to specific contacts.

- Dynamic Segment
- Marketing Email
- Customer Journey

In the fourth lab we will look at how Dynamics 365 Marketing can generate leads via a marketing page with an embedded marketing form.

- Marketing form
- Marketing page

In the fifth lab we will focus a more on the automation capabilities of Dynamics 365 Marketing, build a slightly more complex customer journey that branches, using the flow control elements of customer journey.

- Trigger

In the sixth lab we will introduce a way of evaluating the leads we generate with our marketing activities using lead scoring

- Lead Scoring Model
- Sales Ready flag

In the seventh lab we will look at how we can author, schedule and post to e.g. Twitter from Dynamics 365 Marketing using Social posts

- Author
- Schedule

In the eight lab we will set up a simple event and publish it to enable potential participants to register for the event

- Buildings and rooms
- Speakers
- Sessions
- Portal

In many of the chapters we will also look at the rich insights generated by Dynamics 365 Marketing helping us to understand the effect our our efforts

Note	All exercises in this document reflect the version of Dynamics 365 Marketing at the time of writing (February 2020) – version 1.35.10057.1055

Lab 1: Create dynamic segments

One of the first and most important decisions you'll make when you design any marketing piece is to choose the right audience. Only after you know this will you be able to tailor your message to best appeal to that group of people.

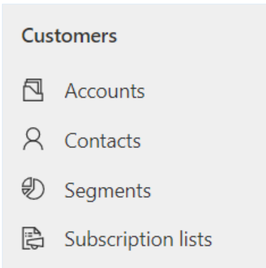
In Dynamics 365, you'll set up a collection of segments, which you'll define by using terms that resemble those you already use to describe groups of customers, such as "female wine enthusiasts over 40 living in San Francisco" or "craft beer fans from North Carolina who visited our booth at the festival."

Then you'll use these segments to target marketing initiatives like email-marketing campaigns and customer journeys. Segments like these, which you define by using a set of rules and conditions, are called *dynamic segments* because membership in these segments changes constantly and automatically based on information in your customer engagement database. (Static segments are populated by adding contacts explicitly, one at a time.)

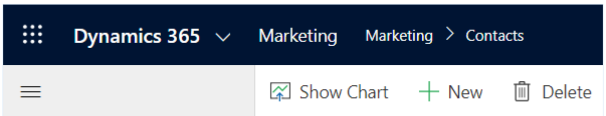
Exercise: Create contacts

In this exercise, you'll create a couple of fictional contacts with email addresses that you can receive mail from, and then set up a test segment that includes those contacts. This test segment will be useful later when you begin to experiment with customer journeys.

In the sitemap go to **Customers** > **Contacts** to open the list of existing contacts

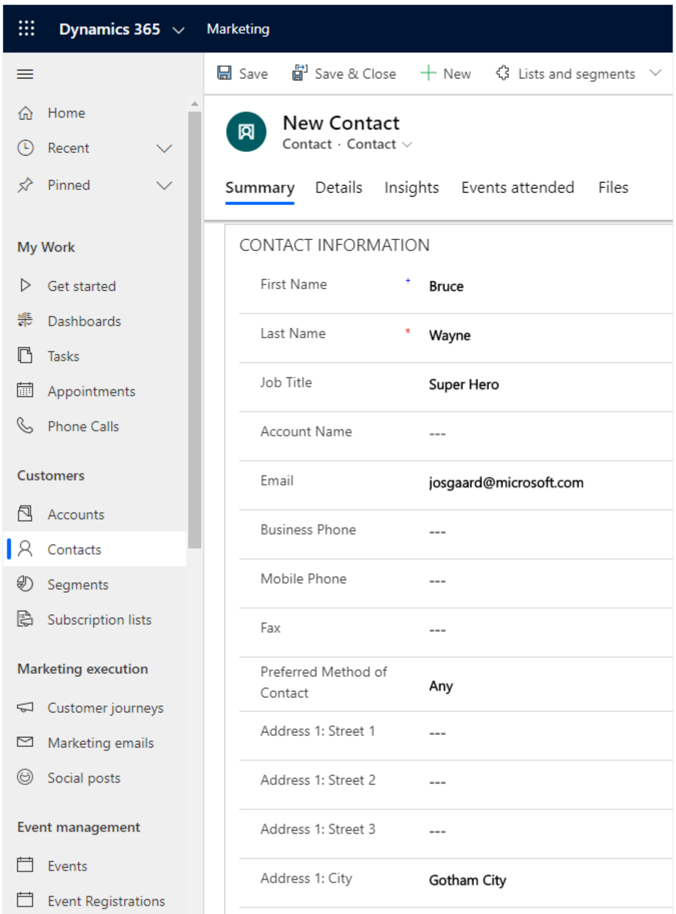


On the command bar, click + **New** to open the **New Contact** form

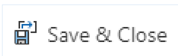


On the **New Contact** form fill out the fields

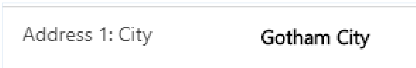
- **First Name**: Enter a fictional first name
- **Last Name**: Enter a fictional last name
- **Email**: Enter your own email address (or one that you can receive mail from)
- **Address 1: City**: Enter a city (for this example, we use Gotham City). This will make it easy to create a segment that only includes fictional contacts



On the command bar, click **Save & Close**



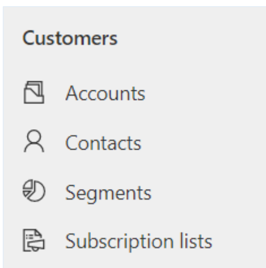
Create a one or more contact(s) like the one you just made. Enter the same city used above for the new contacts for use in the subsequent segment definition.



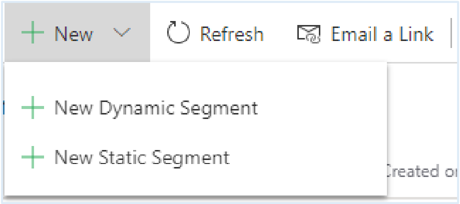
Exercise: Create a simple segment

In this exercise you will create a segment of contacts with the city you specified above

In the sitemap go to **Customers** > **Segments** to open the list of active segments

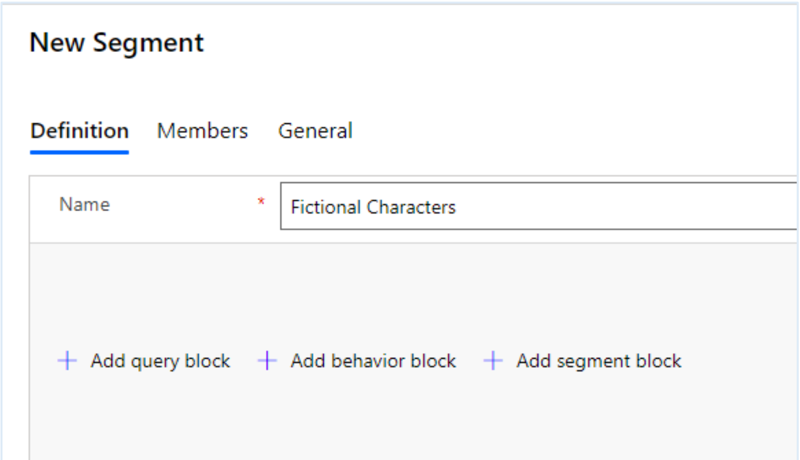


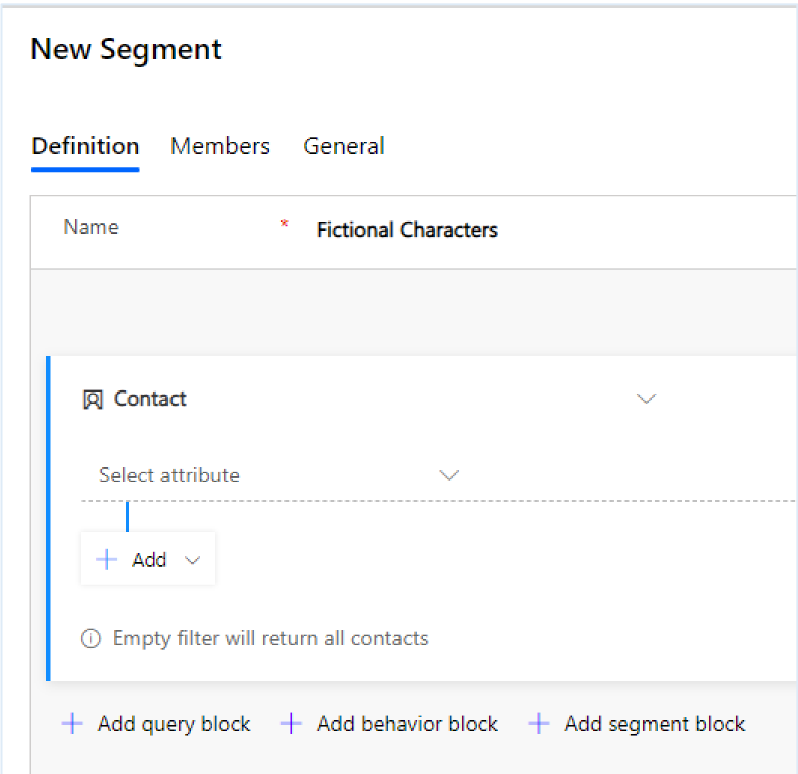
On the command bar, click **New** and then click **New Dynamic Segment** to open the **New Segment** form



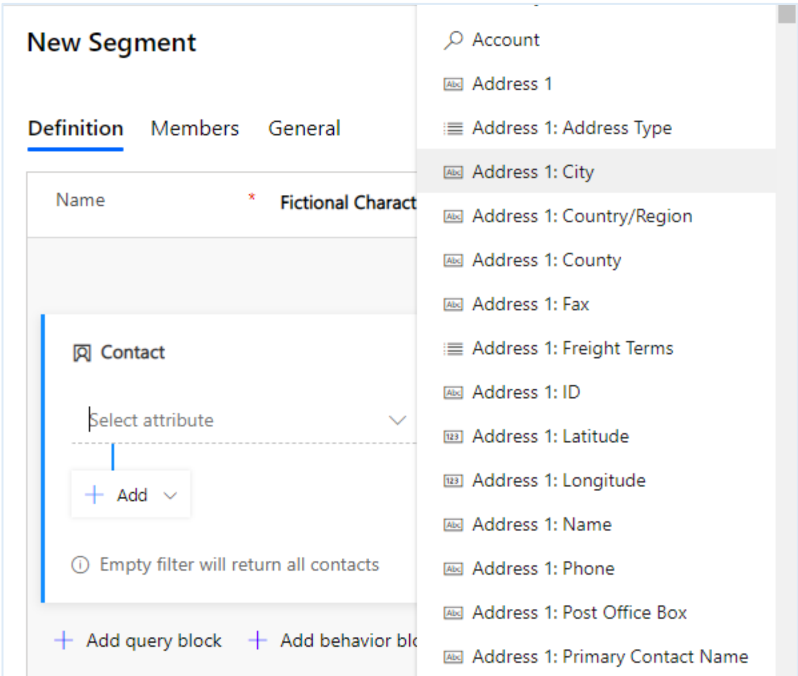
If the **Select Templates** dialog opens, click **Cancel** (this dialog is not important for this exercise)

In the **New Segment** form on the **Definition** tab type a name for your new segment, e.g. “Fictional Characters” and then click **Add query block** to display a new query block

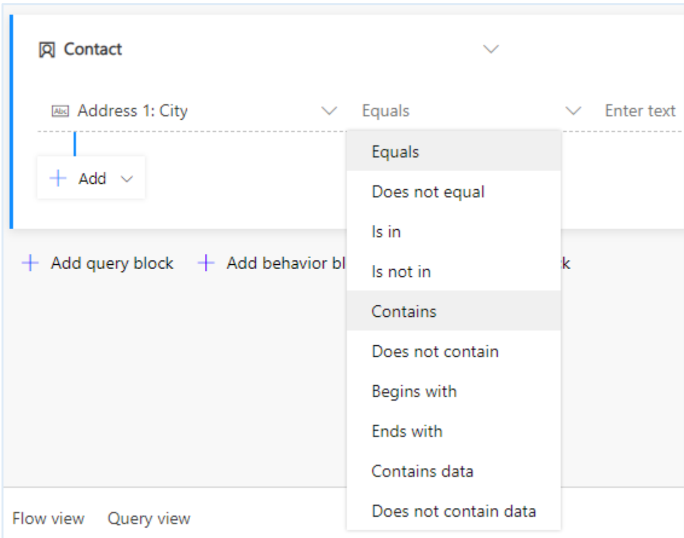




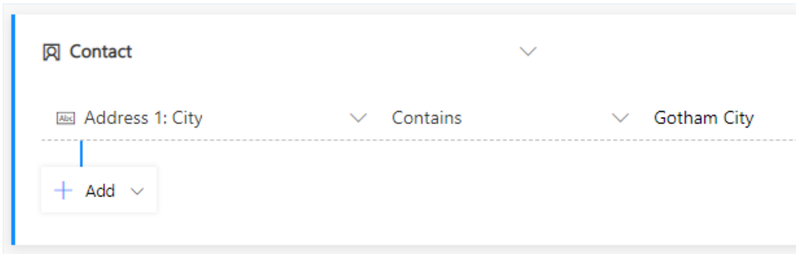
Expand the **Select attribute** drop-down and then click **Address 1: City**



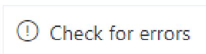
Expand the operator drop-down and click **Contains**



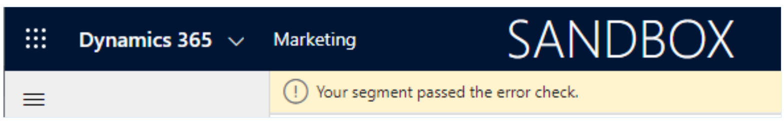
In the **Enter text** textbox type the name of the city you entered for your contacts, e.g. “Gotham City”



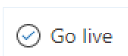
In the command bar click **Check for errors**



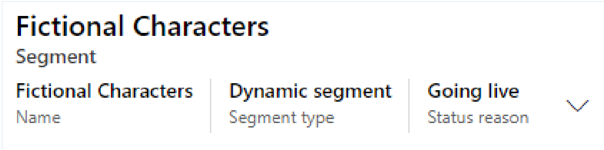
In the notification bar a status will be displayed



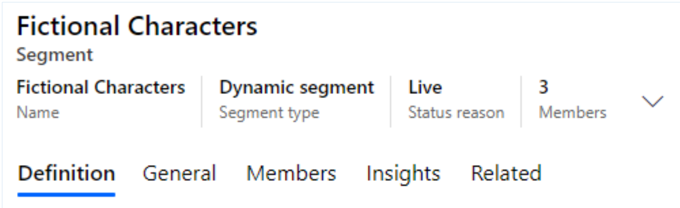
In the command bar click **Go live**



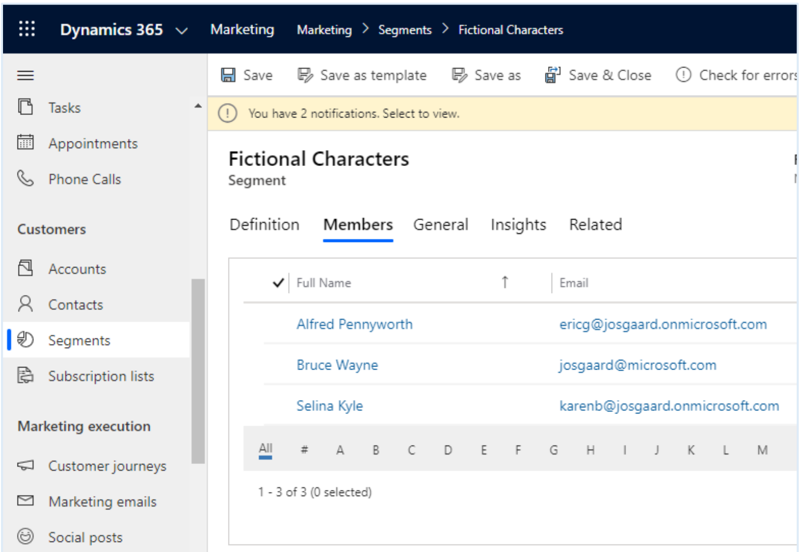
The status reason of the segment will be "Going live" for a few seconds



*After a few seconds, the segment is Live, the member count is listed, and two new sub-tabs (**Members** and **Insights**) are displayed*



Click the **Members** sub-tab to see a list of the members



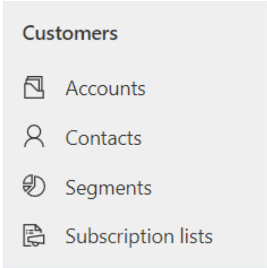
See also	"Working with Segments" https://docs.microsoft.com/en-us/dynamics365/marketing/segmentation-lists-subscriptions

Exercise: Create a Dynamic Segment of Primary Contacts

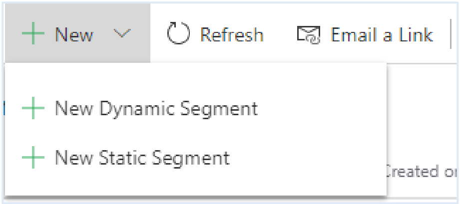
Now that you know how to build a simple segment we will create a new segment based on one of the predefined relationships in Dynamics 365, the relationship between contacts related to accounts and primary contacts.

In this exercise we will leverage the relationship: Contacts (Account -> Contact (Primary Contact)) which will enable us to query for all primary contacts of accounts we define

In the sitemap go to **Customers** > **Segments** to open the list of active segments

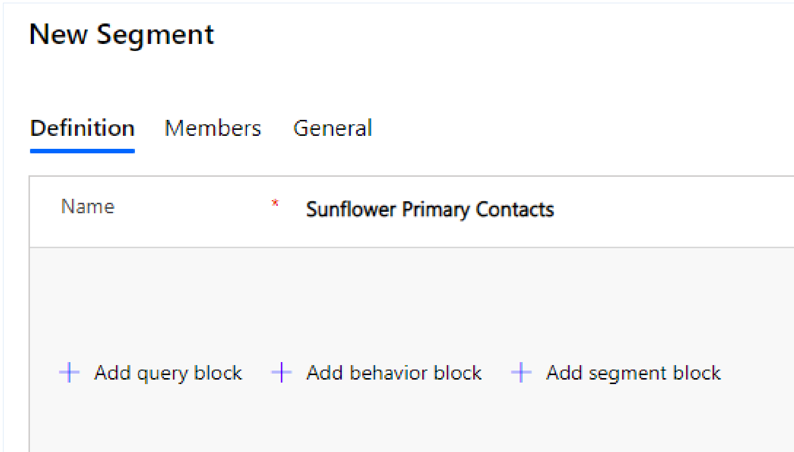


On the command bar, click **New** and then click **New Dynamic Segment** to open the **New Segment** form



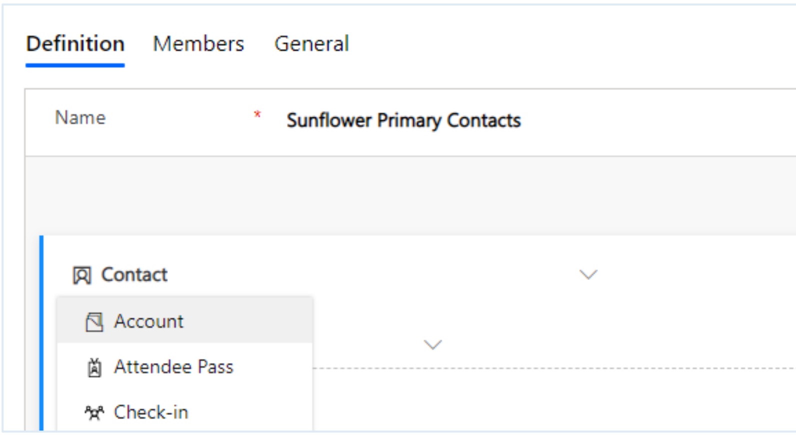
If the **Select Templates** dialog opens, click **Cancel** (this dialog is not important for this exercise)

In the **New Segment** form on the **Definition** tab type a name for your new segment, e.g. “Sunflower Primary Contacts”, **Save** the segment, and then click **Add query block** to display a new query block

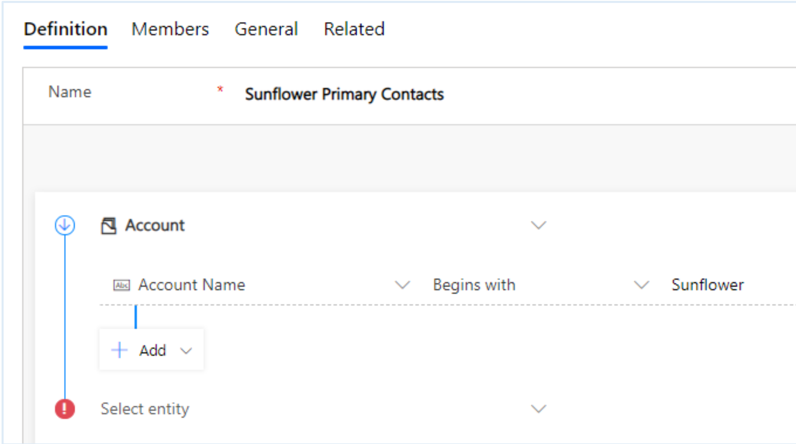


In the new query block change the target entity from Contact to **Account**

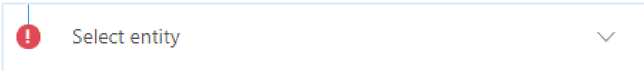
This will allow us to leverage the relationships between accounts and contacts



In the row under the target entry build a query to find the accounts where **Account Name** Begins With "Sunflower"

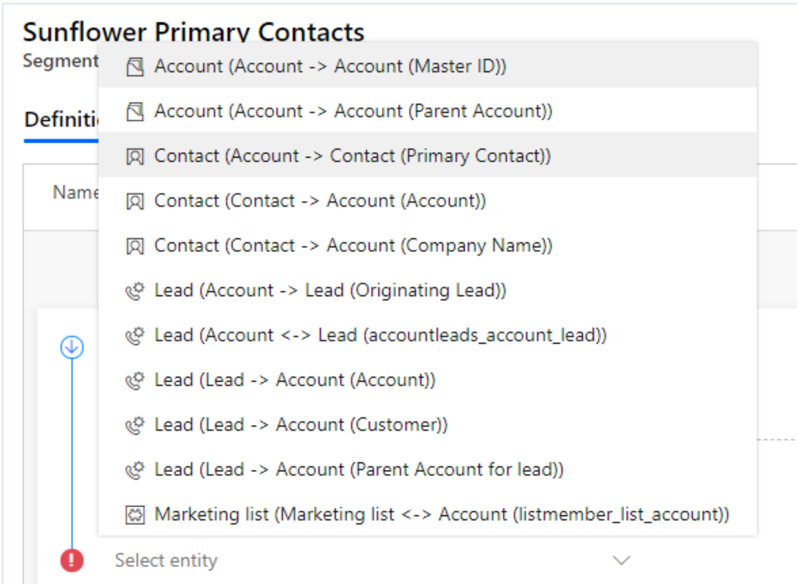


Expand the **Select entity** drop-down (which in this case is really a relationship picker)

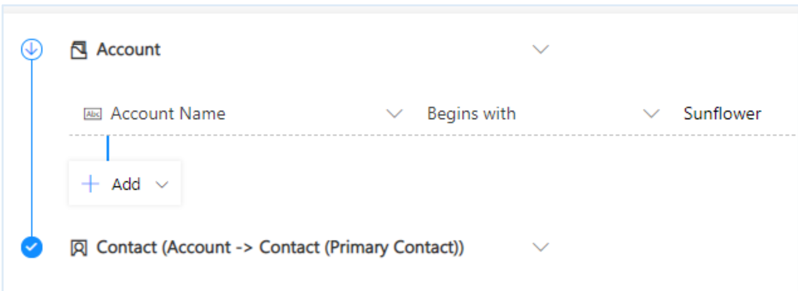


In the **Select entity** drop-down click the relationship:

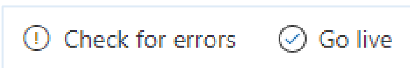
Contact (Account -> Contact(Primary Contact))



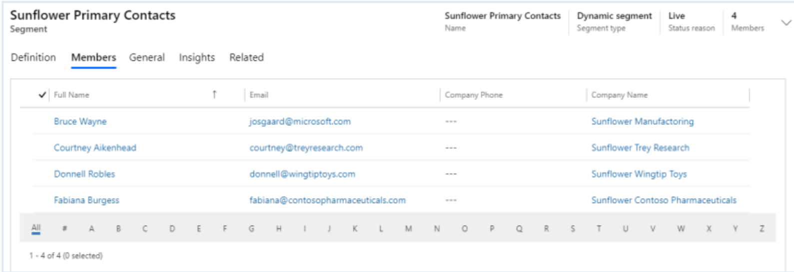
The query should look like this



Click **Check for errors** and then click **Go live**



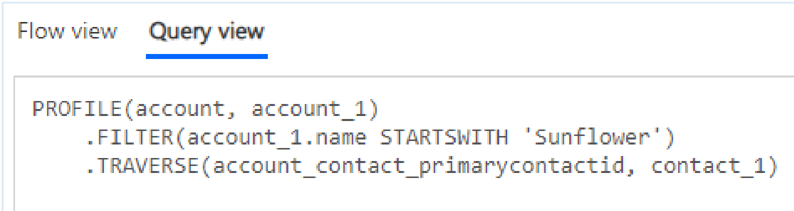
After a few seconds click the **Members** tab to verify your segment has members



You won't be able to use segments in a customer journey until the segment is live, even though you've saved it.

Dynamics 365 checks the segment for errors and reports any problems it finds. If an error is reported, fix it and try again. If no error is found, your segment is copied to the Dynamics 365 email marketing service, which makes it available for use by a customer journey.

Note: you can verify (and even edit) the segment definition in the ***Query view*** *sub tab*



See also	"Design dynamic demographic or firmographic segments" https://docs.microsoft.com/en-us/dynamics365/marketing/segments-profile "Segment Query definition" https://docs.microsoft.com/en-us/dynamics365/marketing/developer/segment-query-definition

Lab 2: Create a marketing email and go live

Email is a vital marketing channel for most modern organizations. It's also a core feature of Dynamics 365 Marketing, which provides tools for creating graphically rich marketing emails with dynamic, personalized content.

Dynamics 365 can send large volumes of personalized marketing emails, monitor how each recipient interacts with them, drive customer-journey automation based on these interactions, and present results both for individual contacts and with aggregate statistical analytics.

Process overview—to set up and execute a simple email campaign, we must do the following:

1. Create an email design that delivers our email message and includes required elements
   - Subscription-center link
   - Physical address
   - Subject (email)
   - From address (email address)

2. Publish the email design (Go live)

   This copies the design to the Dynamics 365 email marketing service, which makes the email message available for use by a customer journey (but doesn't deliver any email messages yet).

   The go-live process also activates any dynamic code and replaces links with trackable versions that are redirected through Dynamics 365.

3. Set up a customer journey

   A customer journey must, at a minimum, identify a published target segment and a published email message to deliver to that segment

4. Activate the customer journey (Go Live)

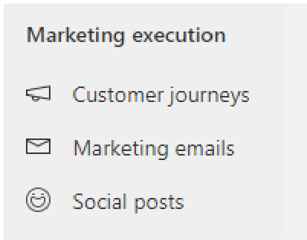
   The journey then drives the email-delivery process and other automation features.

   It personalizes and sends each individual email message, collects interaction data, and can follow up with additional processes based on those interactions.

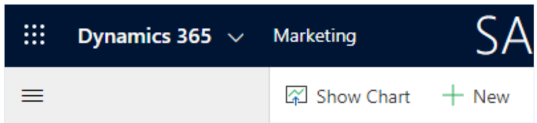
Exercise: Create a blank marketing email

In this exercise you will create a blank email with different section layouts – and add text, dynamic fields, images, a link, your physical address and subscription center to the email.

In the sitemap go to **Marketing Execution** > **Marketing Emails** to open the list of **Active Marketing Emails**



In the list of **Active Marketing Emails** click **New** to open the **New Marketing Email** designer

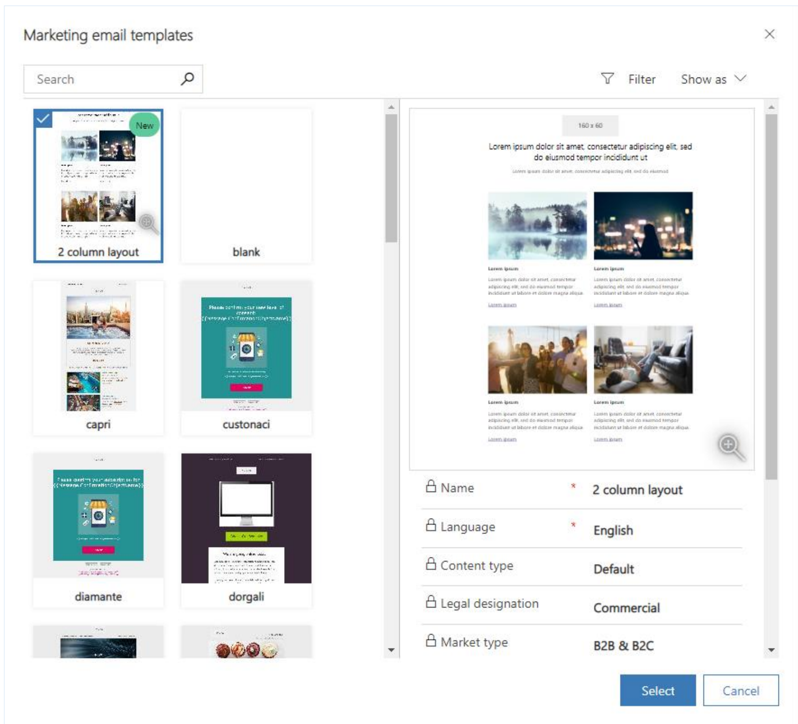


In the **New marketing email** designer, the **Marketing email templates** dialog opens automatically

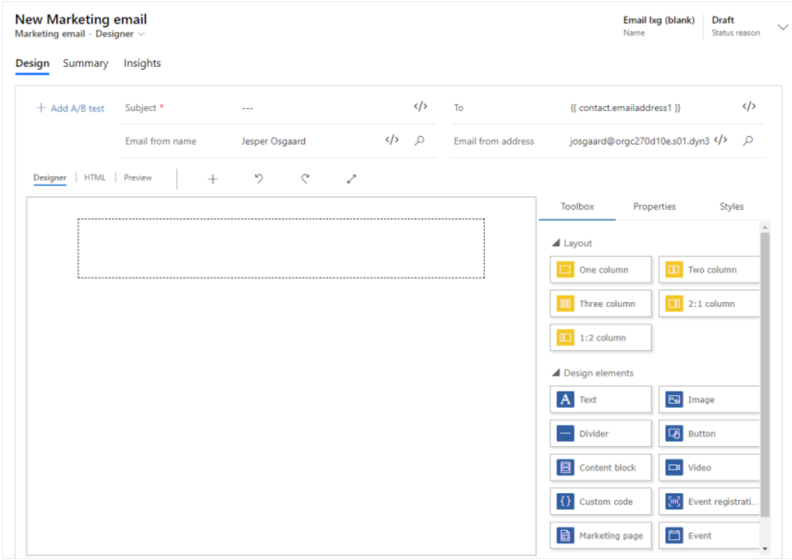
In the **Marketing email templates** dialog select the **Blank** template and then click **Select** to apply the template to your new email message

For this exercise, you select the blank template to allow for you to step manually through setting up the required content

Each template provides a starting point for designing a particular type of email message. The template dialog box provides tools for searching, browsing, and previewing your template collection.



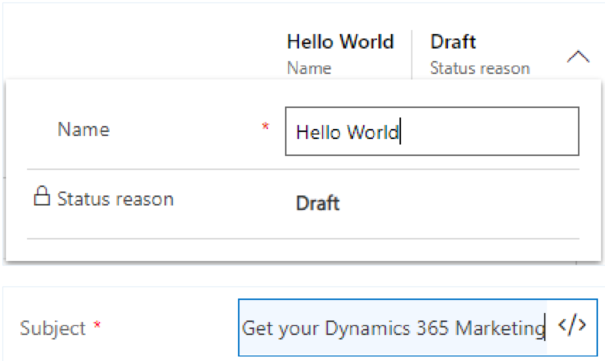
*The **Marketing email templates** dialog box closes and the content (if any) from your selected template is copied to your design.*



Type or change the **Name** of the email, and the **Subject** of the email

***Name**: This is an internal name for your email message. Enter any name that you will easily recognize later.*

***Subject**: This is the subject that email recipients will see when they receive the email message.*

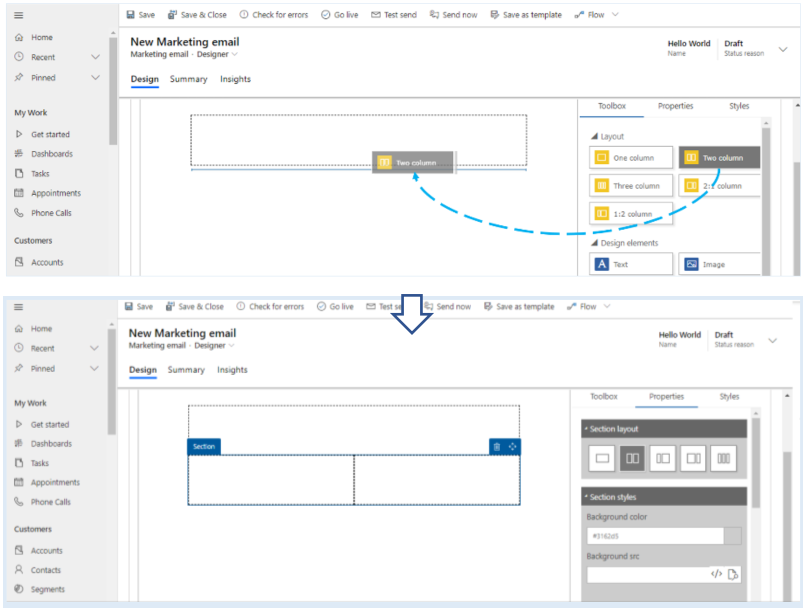


Exercise: Add Section Elements to the email

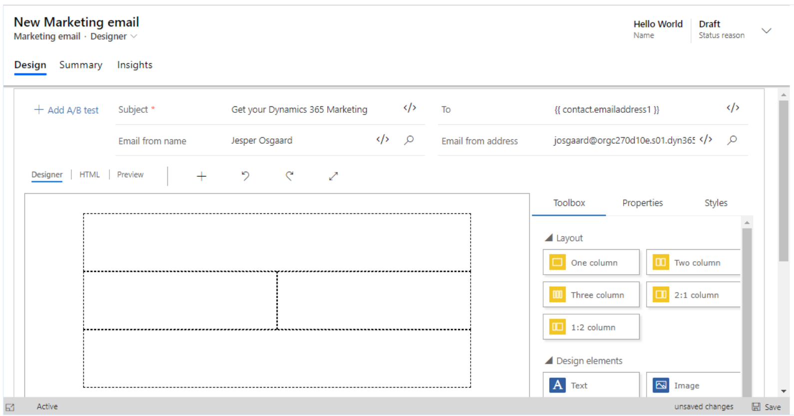
When you're designing an email, page, or form starting with the blank template (or a custom template based on the blank template), all design elements (other than section elements) must be placed into a section element. Section elements are provided in the Toolbox panel under the Layout heading.

The blank templates provide a one-column section by default, but you can edit its column layout and/or add more section elements as needed.

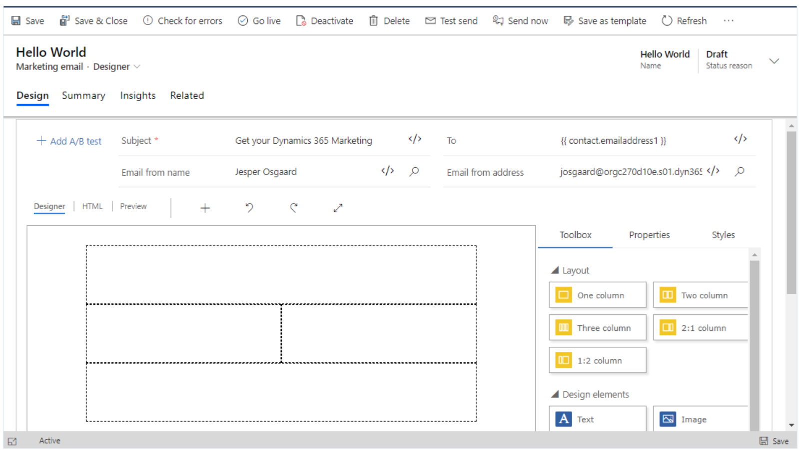
To add a section element, open the **Toolbox** panel, choose the section element that provides the column layout you'd like to start with and drag it into position above or below any existing section element in your design.



Repeat the above to end up with a layout you like – e.g. like the one to the right



At this point you might want to click **Save** to save your work so far



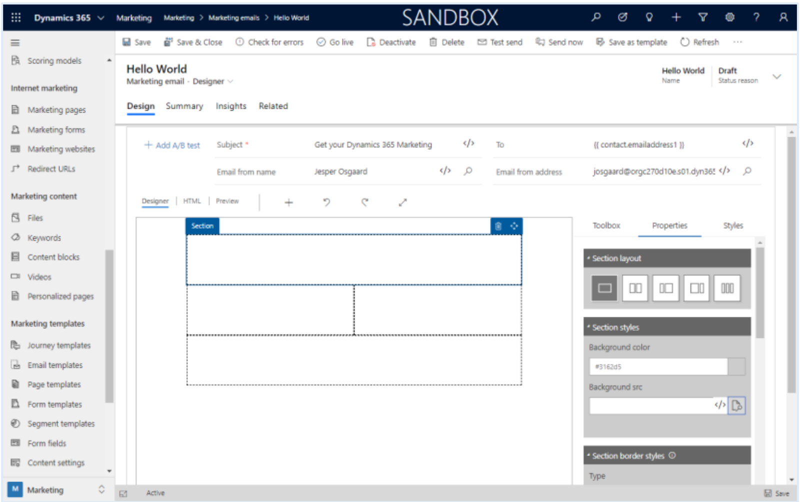
See also	"Add section elements to layout your design" https://docs.microsoft.com/en-us/dynamics365/marketing/design-digital-content#add-section-elements-to-layout-your-design

Exercise: Set background picture of section

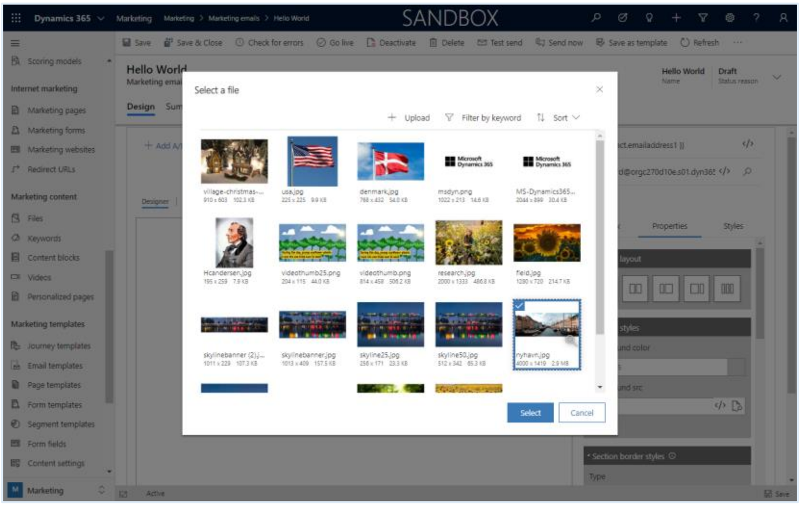
Note: this exercise leverages files (pictures) uploaded to Dynamics 365 Marketing. To upload files just navigate to **Marketing Content** > **Files** and upload files (pictures) from your computer

Select the upper section in the canvas and then click the **Properties** pane in the task pane.

Then in the section "Section Styles" click the icon to the far right of the "Background src" text box to display the **Select a file** dialog

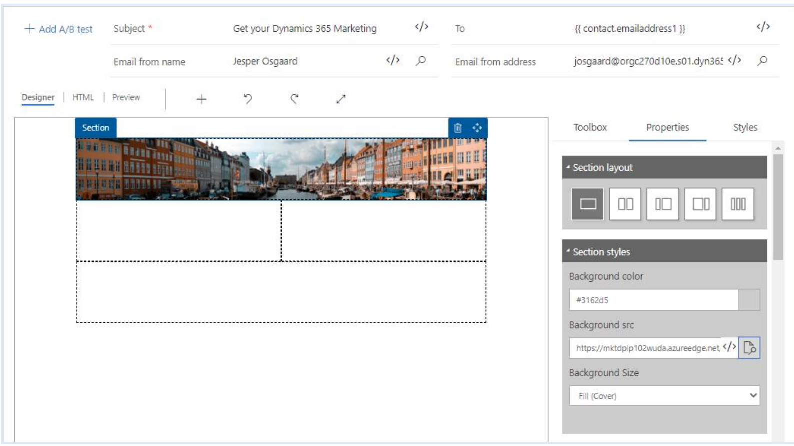


In the **Select a file** dialog select a picture and then click **Select**



The picture is added to the section as background image

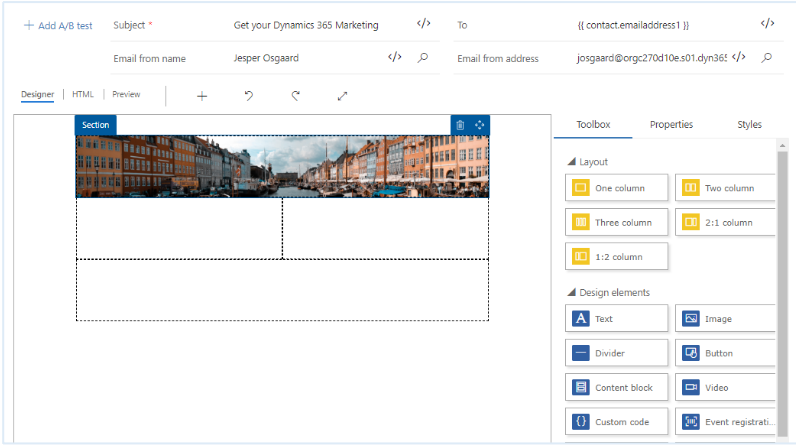
(Note: to change dimensions of the section/picture navigate to the HTML tab in the canvas and edit the parameters)



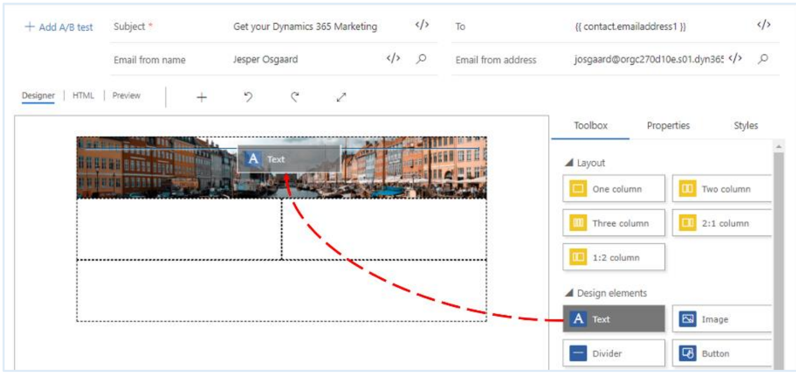
Exercise: Add Text on top of a background picture

In this exercise we will add and format text on top of the background picture (to serve as a headline for the email)

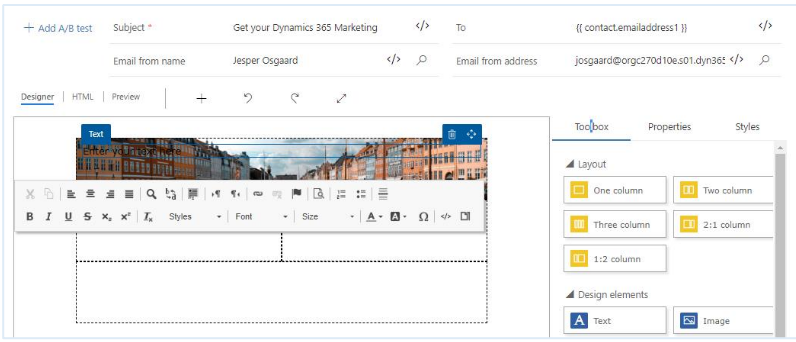
Switch to the **Toolbox** pane



Drag a **Text** control on top of the section with the background image

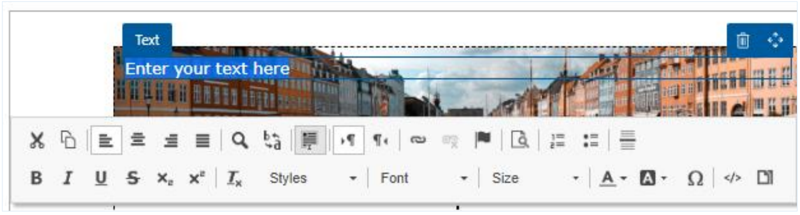


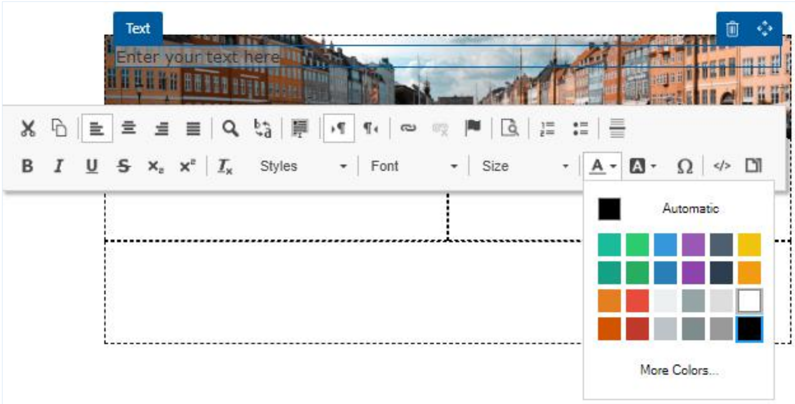
A toolbar is displayed (and a placeholder text in the text control)



Leverage the toolbar controls to style the text (font size, color, justification etc.)

Click the **Select All** button to select the text and work from there.





Exercise: Add Text

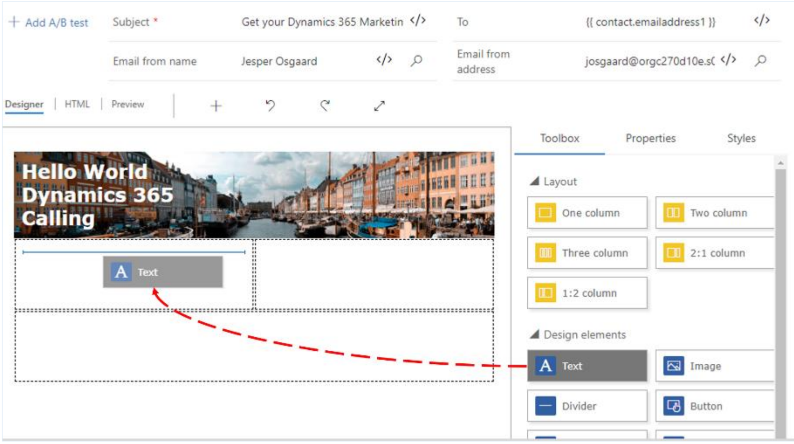
In this exercise we will add static as well as dynamic (personalized) text to the two-column section below the headline section.

The dynamic text is intended to insert the first name of the recipient to make the mail more personal. Dynamic texts can be inserted in other places too, e.g. subject, sender name, sender address etc.

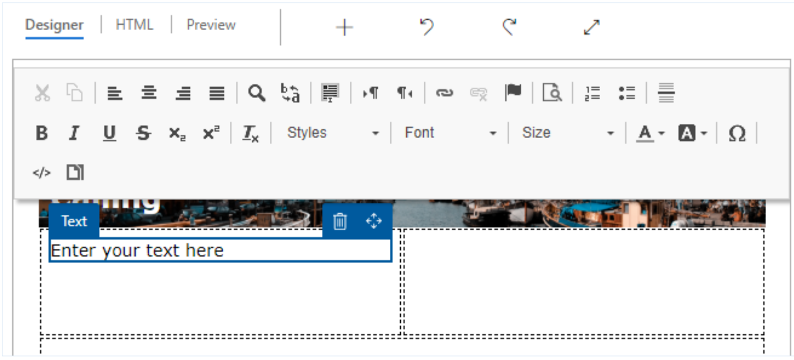
Drag a **Text** block from the **Toolbox** tab over to the target section in the canvas.

When you have dragged the block to a suitable location, a blue shaded region appears.

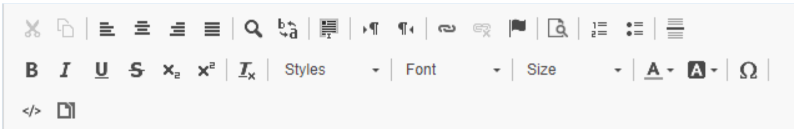
Release the mouse button to drop the block at that location.



After releasing the mouse button, you see a text placeholder and the floating toolbar you worked with in the previous exercise just above it



Select and remove the placeholder text, and then add your own.

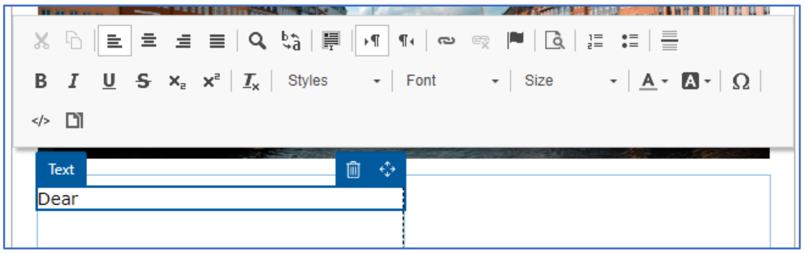


Use the toolbar buttons to style your text as you would in a text editor like Microsoft Word (point to any toolbar button to see what it does).

Most of the buttons are for styling text and paragraphs, but there are also buttons for creating links, entering dynamic text (the so called ***Assist Edit*** *button), and moving, copying, or deleting the entire text block.*

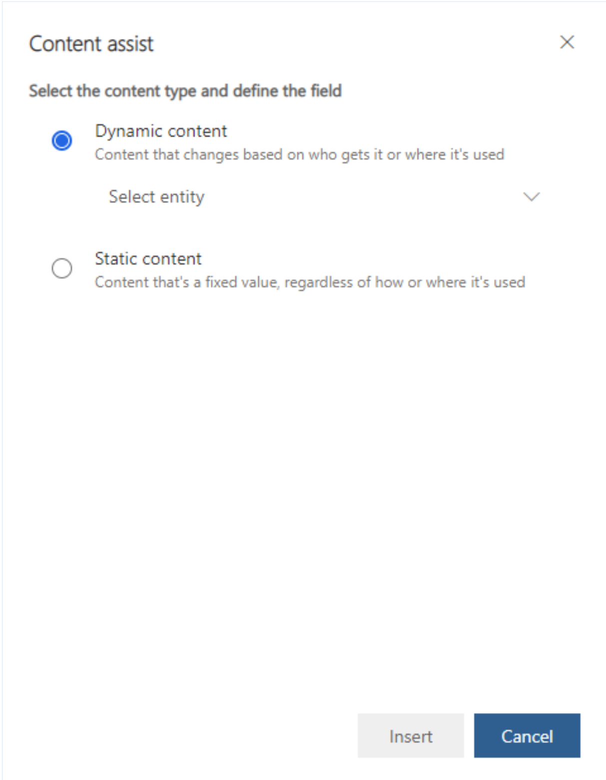
An easy way to personalize the email message is to include the name of the recipient in the greeting.

Working in the text block you just added, enter a suitable opening such as **Dear**.

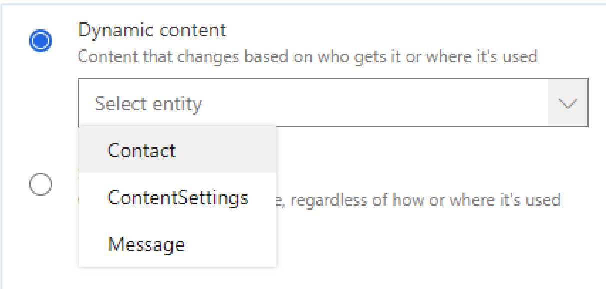


Insert a space after "Dear" and then on pop-up toolbar, click the **assist-edit** button.

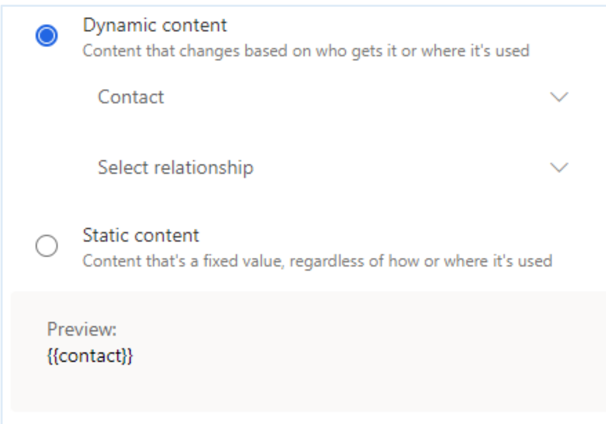
*This opens the **Content assist** dialog to assist you in building and adding a dynamic field to the text block.*



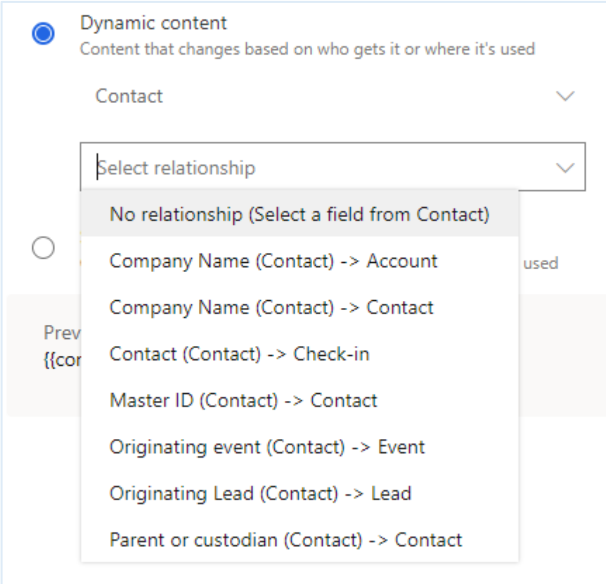
In the **Dynamic content** section expand the **Select entity** drop-down list, and then click **Contact**



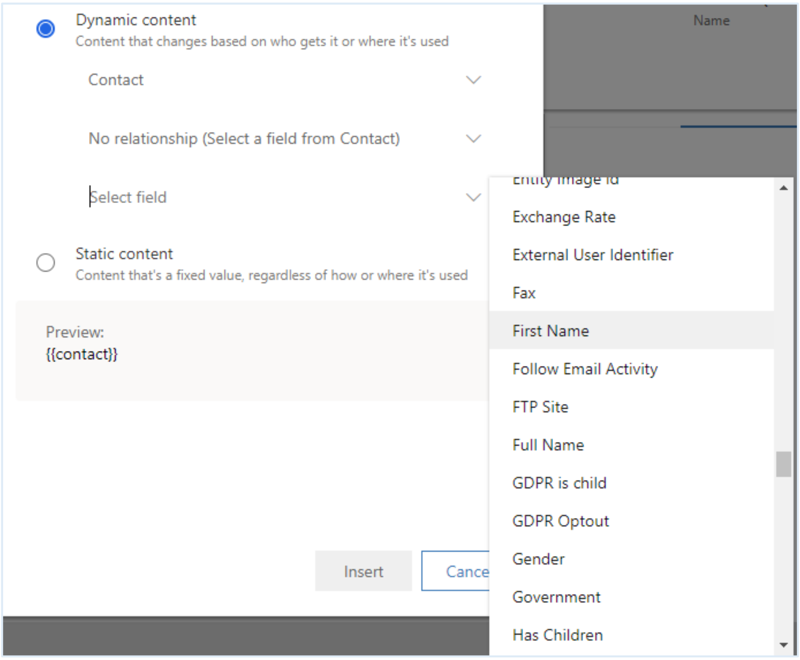
Note in the grey box below how the assist-edit tool enters code that references the contact entity



Expand the **Select relationship** drop-down and click the "No relationship (Select a field from Contact" entry at the top

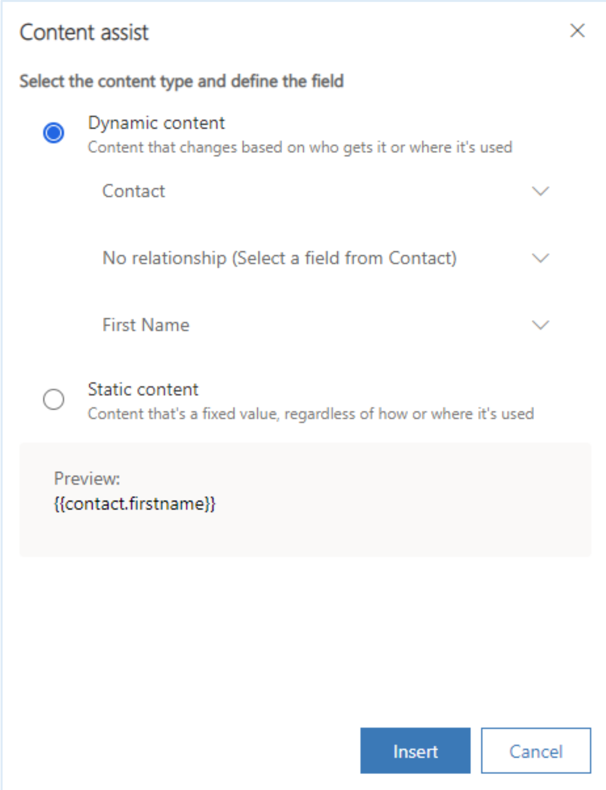


Expand the **Select field** drop-down and click the "First Name" entry

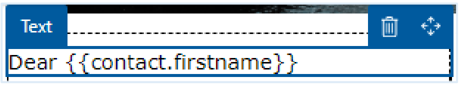


Click **Insert** to insert the dynamic field into your text placeholder

The Content assist tool finishes the code so that it references the first-name field from the contact entity.



The full salutation now looks something like this: ***Dear {{contact.firstname}}****. (If you prefer, you could have entered the code field directly without using the assist-edit.)*



Finish the text box by adding text and (optionally) line breaks, formatting etc.

See also	"Use assist edit to place dynamic field values" https://docs.microsoft.com/en-us/dynamics365/marketing/dynamic-email-content#use-assist-edit-to-place-dynamic-field-values "Use custom attributes to enable designer features in emails, pages, and forms" https://docs.microsoft.com/en-us/dynamics365/marketing/custom-template-attributes

Exercise: Add an Image

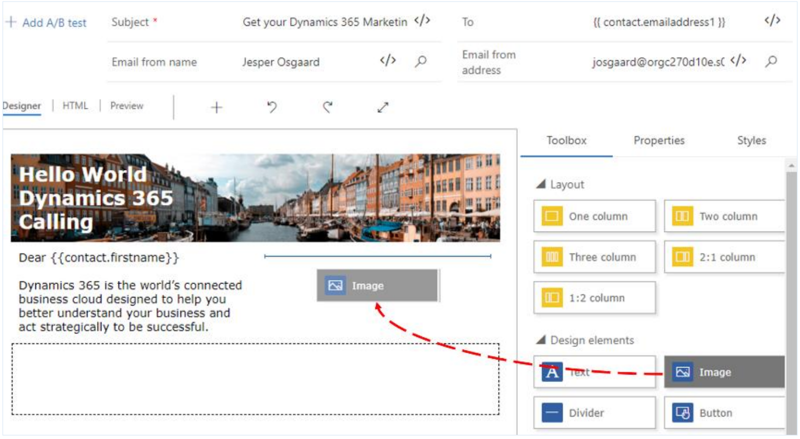
You should usually include at least one visible image in your design because this will invite recipients to load images, which is required for Dynamics 365 to log the message-open event. Also, images make the email more compelling for the reader.

In this exercise we will add an image to the two-column section below the headline section.

Drag an **Image** block from the **Toolbox** tab over to the target section in the canvas.

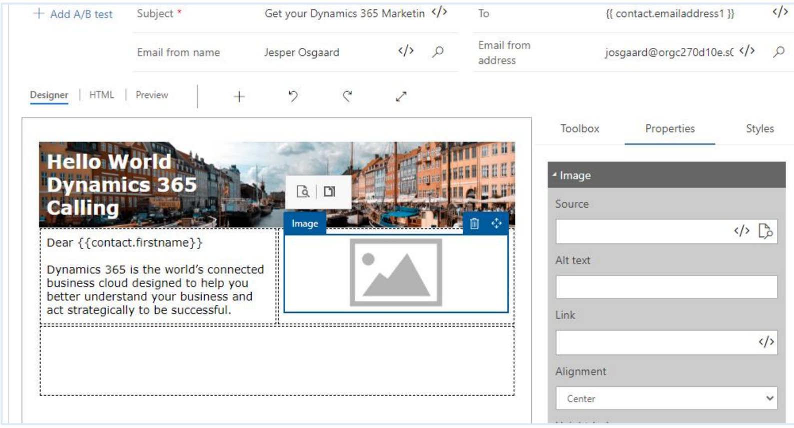
When you have dragged the block to a suitable location, a blue shaded region appears.

Release the mouse button to drop the block at that location.



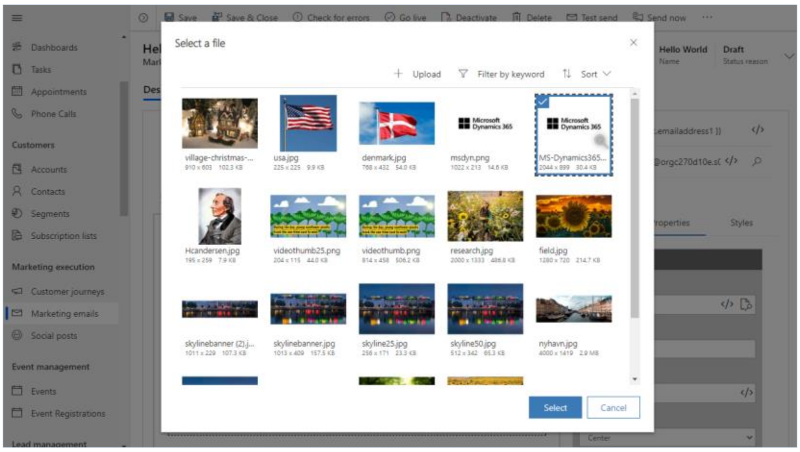
After releasing the mouse button, you see an image placeholder and a two-icon floating toolbar just above it

Also, the Properties pane is opened in the task pane

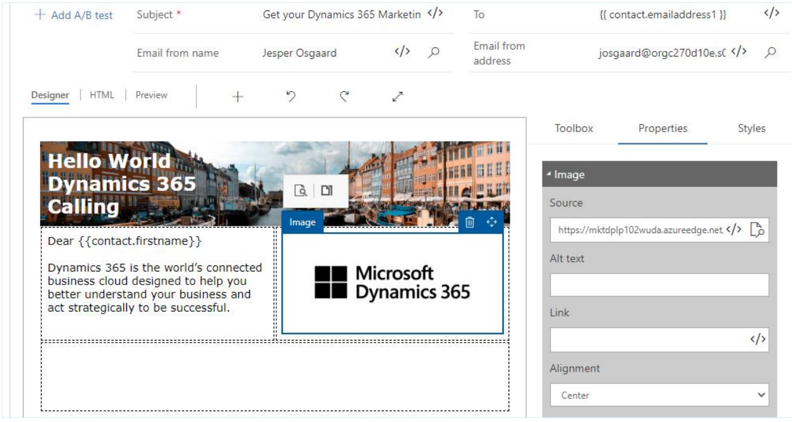


Click the **Image Gallery** button in the toolbar or in the task pane to display the **Select a file** dialog

Select a picture and then click Select to insert the picture into the placeholder in the mail



The image is displayed in the image placeholder in the email message



Tip	When an email message goes live, Dynamics 365 uploads all relevant images from your library to its content-delivery network, where they become available as a single source to all recipients. The images aren't attached to each email message, but instead are included as links that are redirected through Dynamics 365 for tracking purposes. Recipients won't download any images until they open the email message, which saves bandwidth both for you and them. When a recipient's email client requests the images, Dynamics 365 knows that the email message has been opened, and by whom.

Exercise: Add a Link

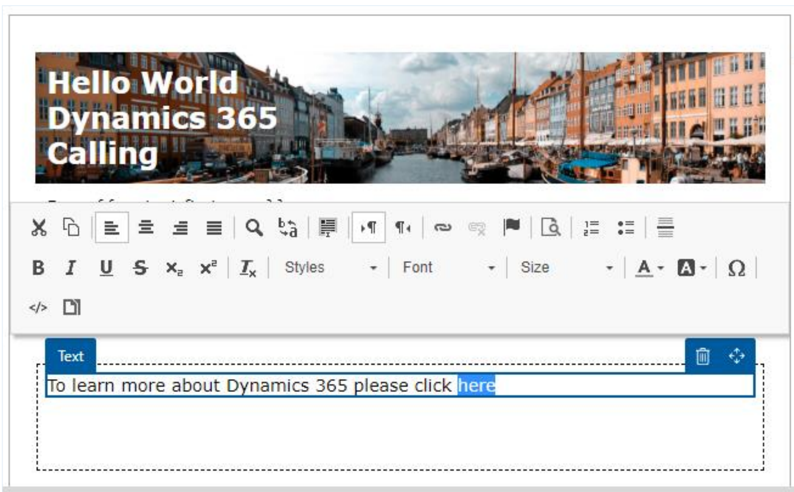
You can insert links to websites you'd like the recipients to navigate to for more information (or Marketing Pages with Forms you'd like the recipients for fill out – more on that later).

When the recipient clicks the link, Dynamics 365 Marketing records the click (this insight can be leveraged for Lead Scoring and other things)

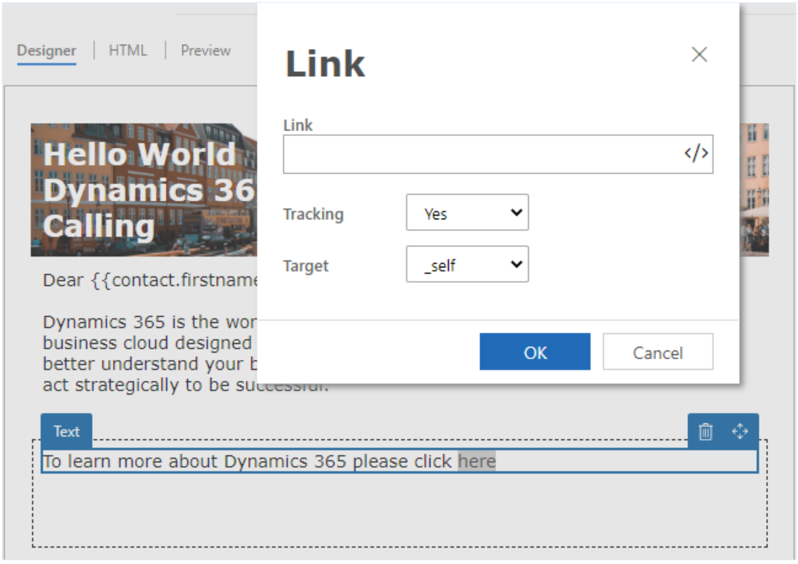
In this exercise we will add a text to the lower section of the email with a link to a website

Choose a suitable location in the text block for the link, and then enter an anchor text there (such as "To learn more about Dynamics 365 please click here")

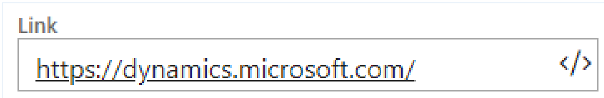
Select the text you wish to use as the anchor text (in this example the last word – "here")



Click the **Link** button in the floating toolbar to open the **Link** dialog box



Paste/type a website URL into the **Link** box and then click **OK**



The anchor text is now hyperlinked, and when a recipient clicks this link in a mail, he/she will be taken to the webpage

Exercise: Add Physical Address and Subscription Center

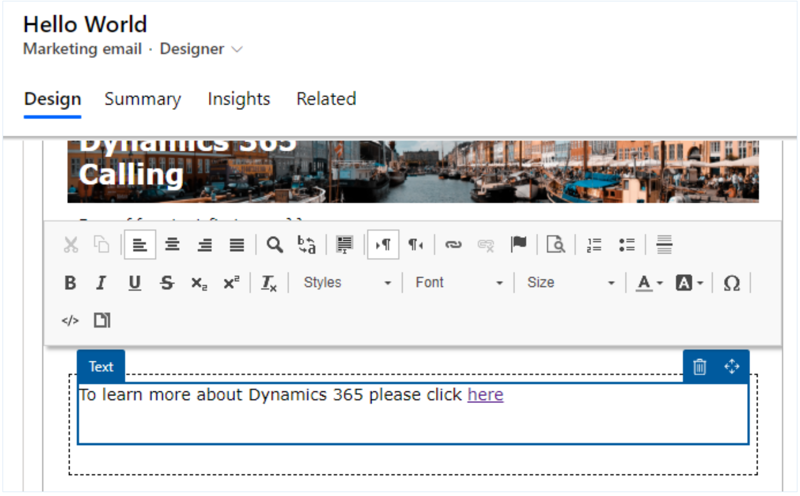
The body of all email messages must include both a subscription-center link and your organization's physical address.

These are required by law in many jurisdictions, and Dynamics 365 won't let you publish any marketing email that doesn't have them. Most email templates in Dynamics 365 Marketing includes them already, but when you're working with a blank template you must add them yourself.

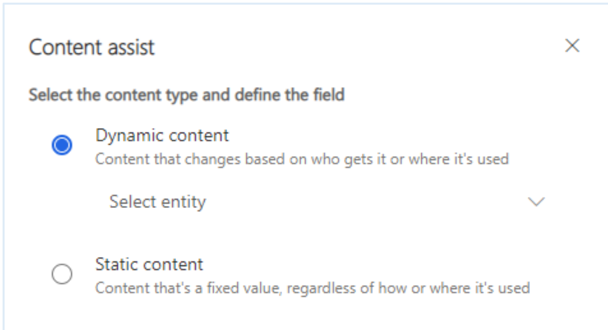
Like you did when you inserted a dynamic field for the recipient's first name in the previous exercise, you will insert the dynamics field for the physical address using the **Assist Edit** dialog

Insert link to a physical address

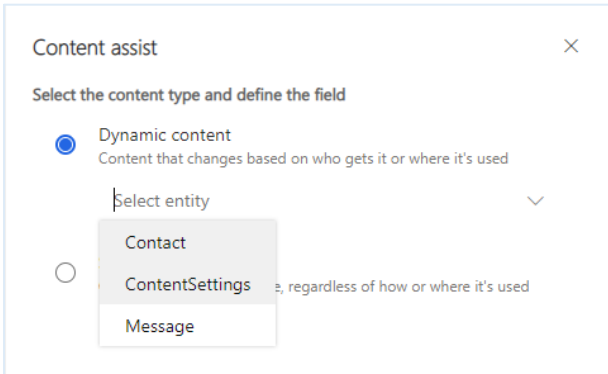
Choose a suitable location for your physical address, and then use assist-edit to place it



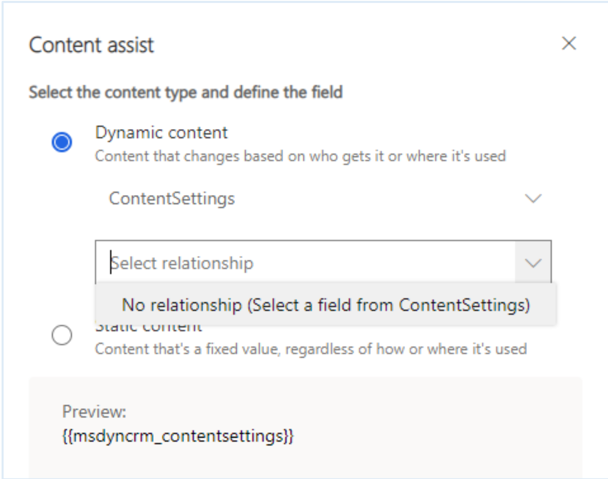
Click the **Assist-Edit** button in the floating toolbar to open the **Content assist** dialog



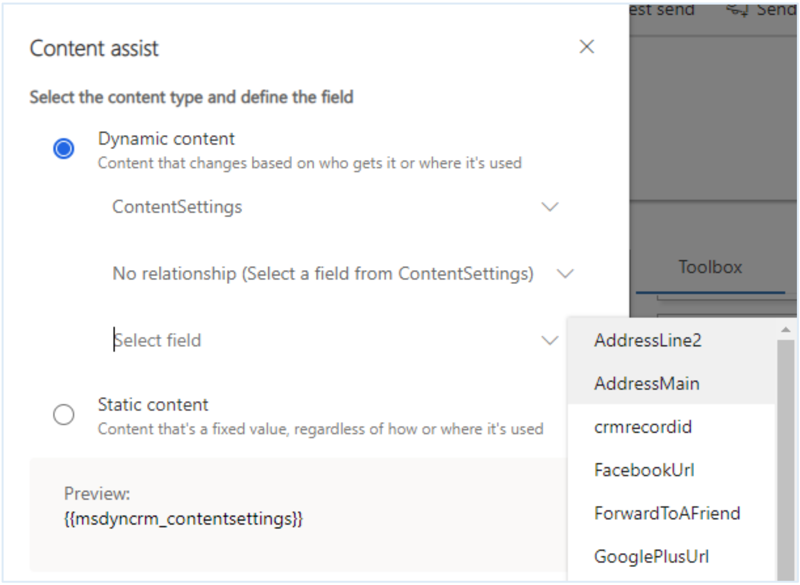
In the **Dynamic content** section expand the **Select entity** drop-down list, and then click **ContentSettings**



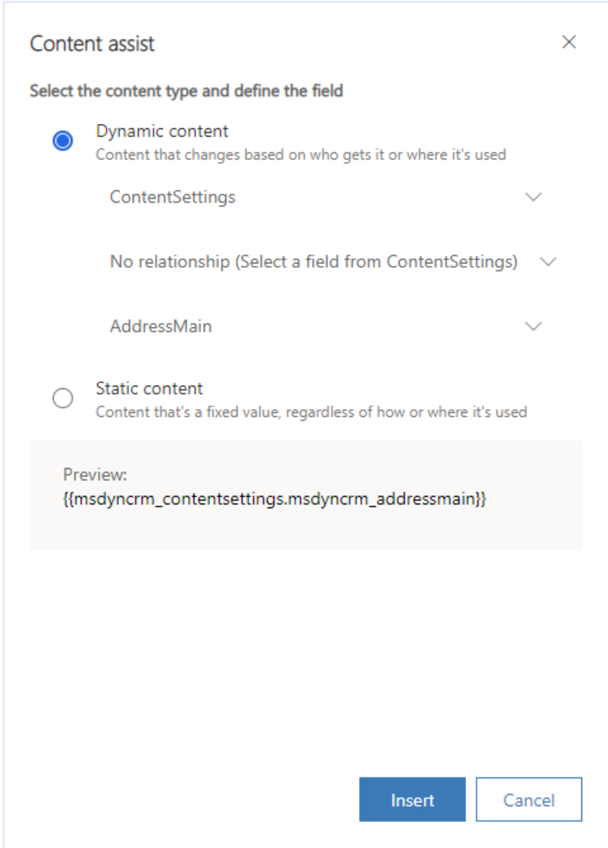
Expand the **Select relationship** drop-down and click the "No relationship (Select a field from ContentSettings)" entry



Expand the **Select field** drop-down and click the "AddressMain" entry

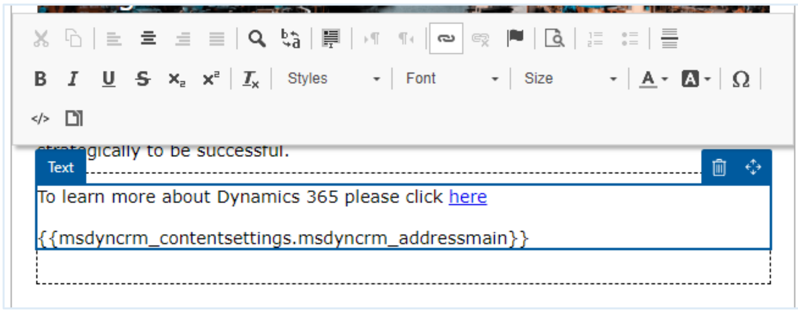


Click **Insert** to insert the dynamic field into your text placeholder

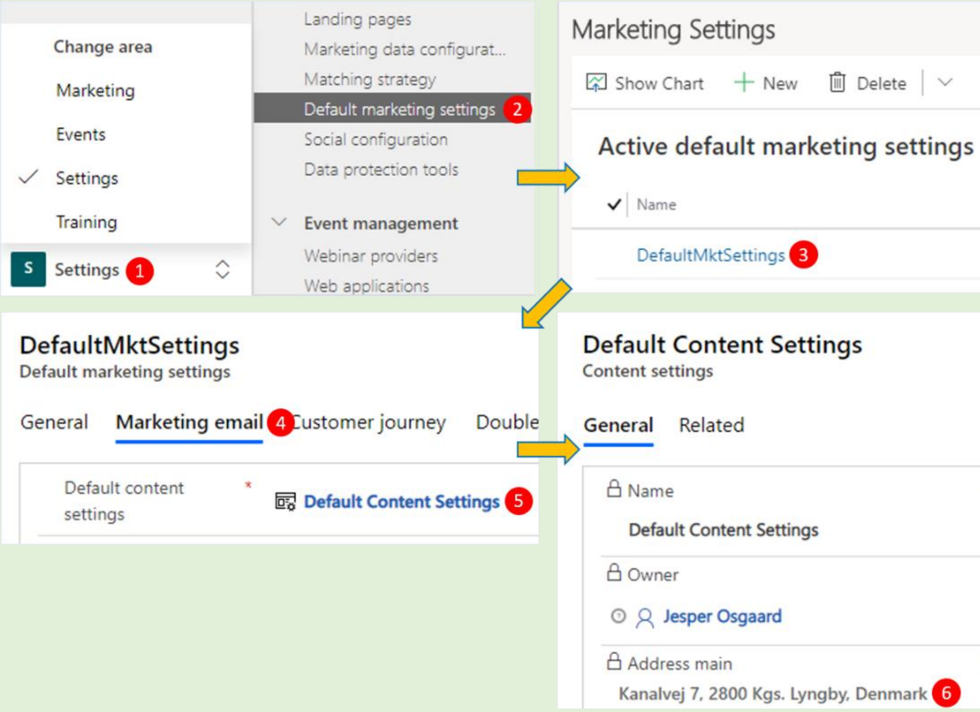


The dynamic field is inserted at the cursor position

This field will resolve to your physical address when the email is delivered



Tip	When emails are sent, the **AddressMain** field is resolved to the address that you or the tenant administrator entered during the initial setup of Dynamics 365 Marketing. To change the address navigate to **Settings** (1) > Advanced Settings > Marketing Settings > **Default Marketing Settings** (2) > **DefaultMktSettings** (3) > **Marketing email** (4) > **Default Content Settings** (5) > **Address Main** (6)

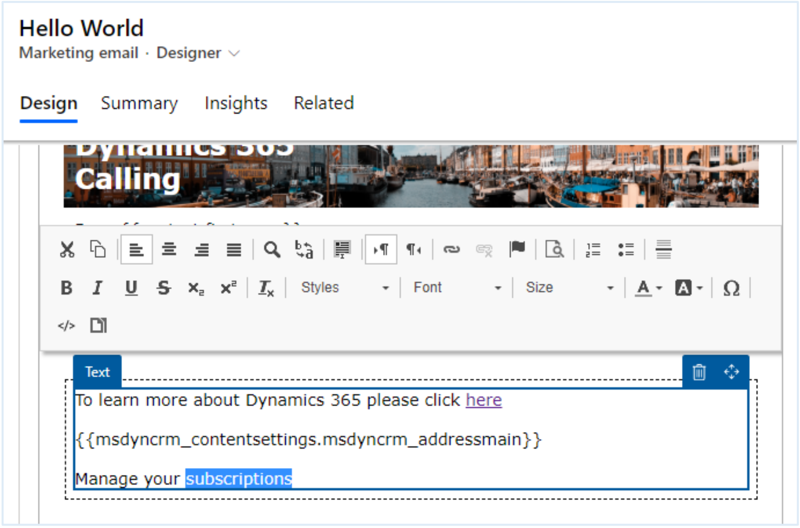


See also	“Use content settings to set up repositories of standard and required values for email messages” https://docs.microsoft.com/en-us/dynamics365/marketing/dynamic-email-content#use-content-settings-to-set-up-repositories-of-standard-and-required-values-for-email-messages

Insert link to Subscription Center

Like you did when you inserted a link to a website a previous exercise (▶Exercise: Add a Link), you will insert the link for the subscription center using the **Link** dialog

Choose a suitable location for the subscription-center link

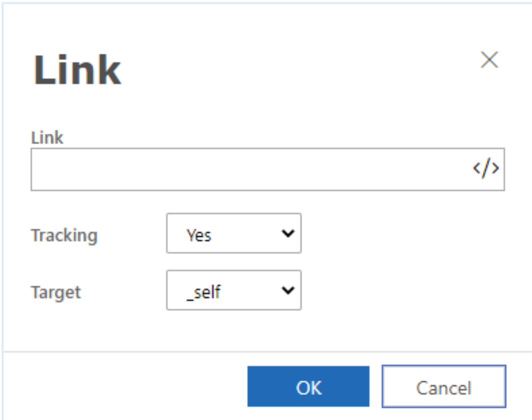


Enter some anchor text there (such as "Manage your subscriptions")

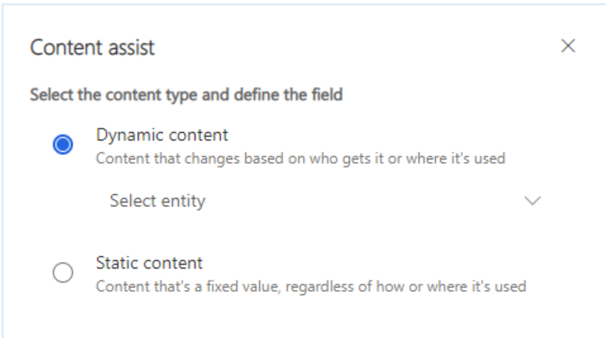
Select the anchor text, e.g. "subscriptions"

The selected word(s) will be hyperlinked to take the recipient to a personalized subscription center

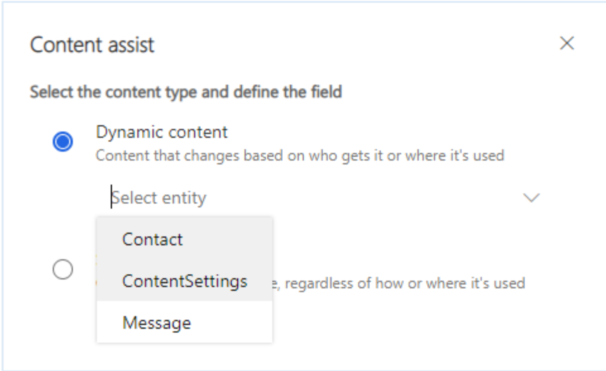
In the floating toolbar click the **Link** button to open the **Link** dialog box



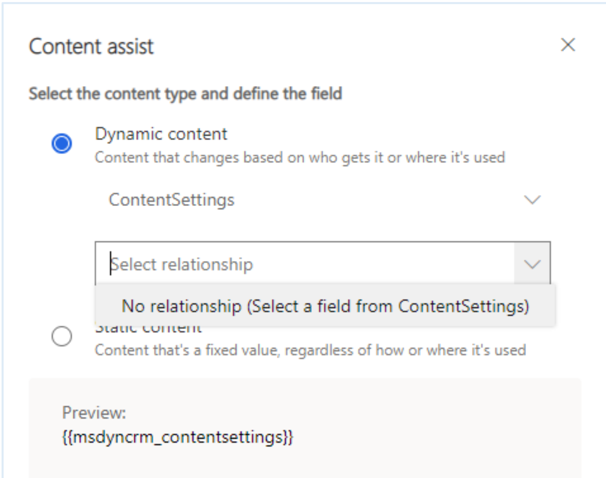
Click the **assist-edit** button at the end of the **Link** text box to open the **Content assist** dialog box



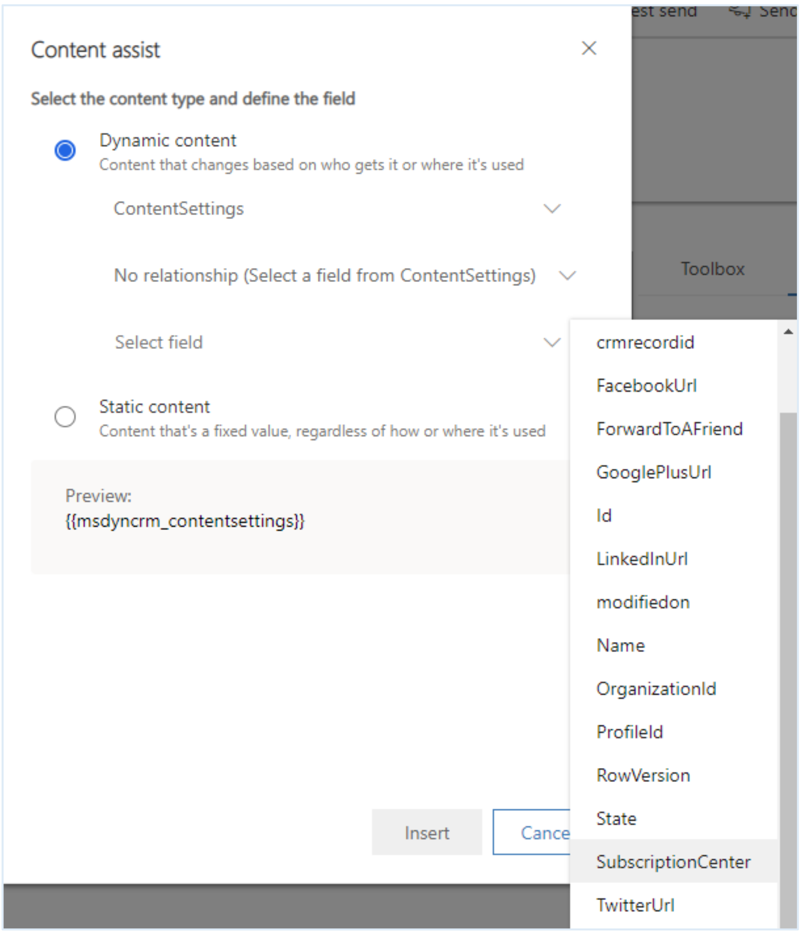
In the **Dynamic content** section expand the **Select entity** drop-down list, and then click **ContentSettings**



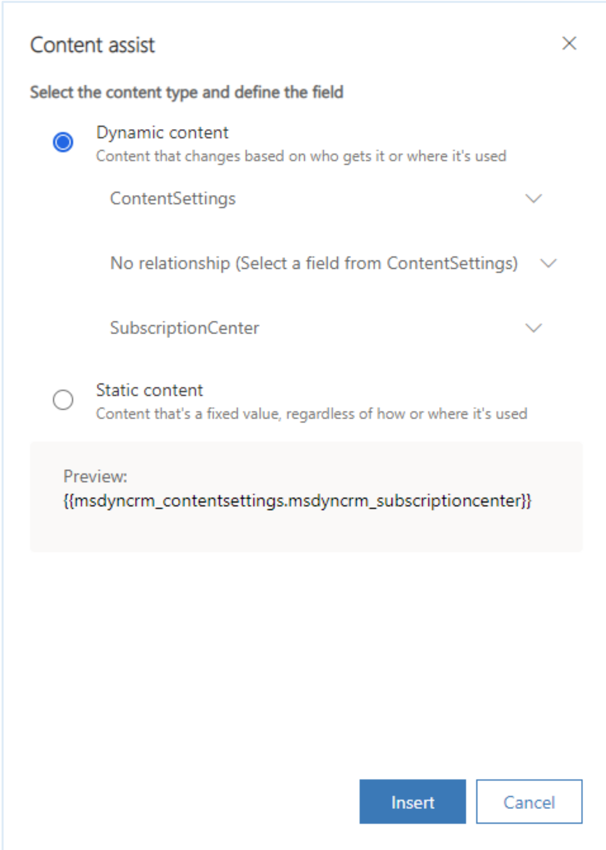
Expand the **Select relationship** drop-down and click the "No relationship (Select a field from ContentSettings)" entry



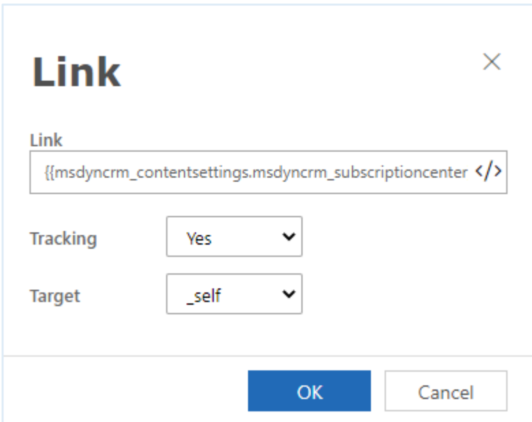
Expand the **Select field** drop-down and click the "SubscriptionCenter" entry



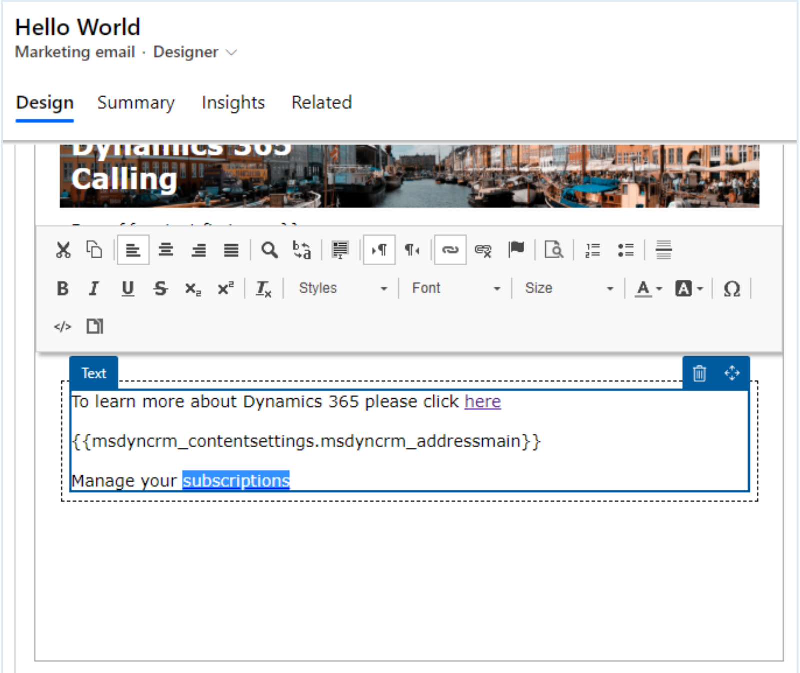
Click **Insert** to insert the dynamic field into your **Link** dialog



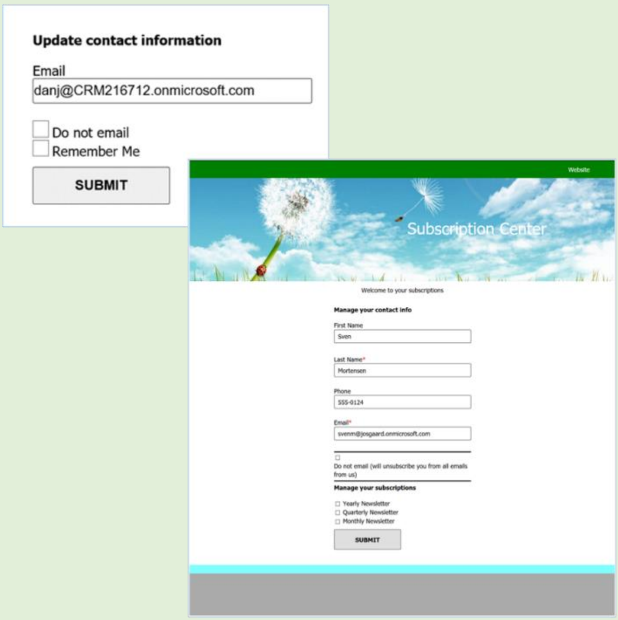
Click OK to close dialog and insert the link

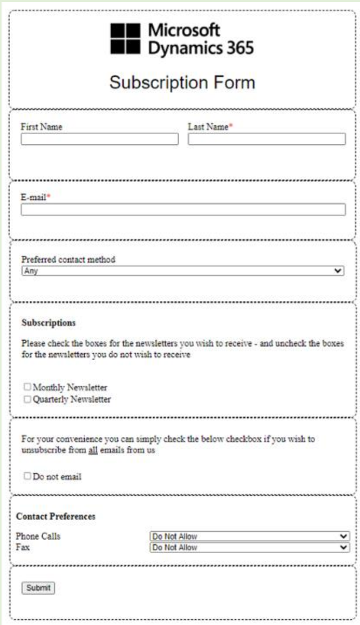


The anchor text is now hyperlinked



Tip	When a recipient clicks the subscription center link in an email the recipient will be taken to a webpage (the subscription center) in which the recipient can opt out of emails and more. You can leverage the built-in (simple) webpage or design your own.





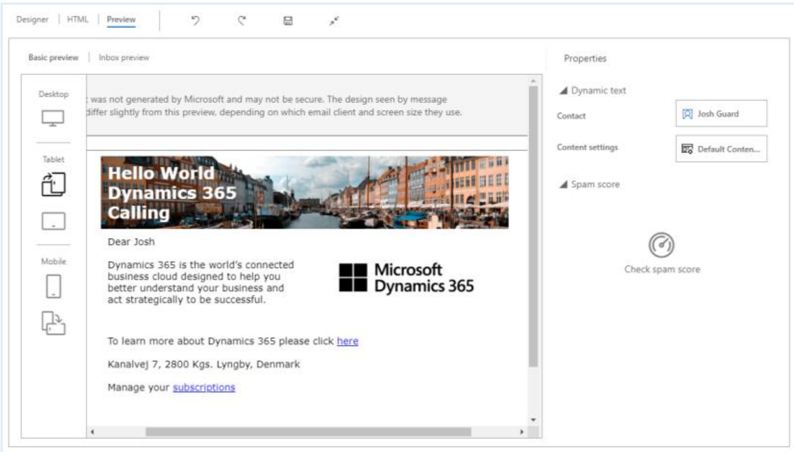
Tip	Values that you use often, including required content like the subscription-center link and physical address, are stored in Dynamics 365 as content settings. That's why you chose the content settings entity when placing these values by using assist-edit. Content settings provide a central location where you can store and update information that you use in most or all your messages. You can have as many Content Settings records as you like, but many organizations use just one. When you set up a customer journey, you'll also pick the Content Settings record used by all messages sent by that journey. This means that you can reuse the same marketing email in different customer journeys, but dynamic values taken from the Content Settings record can vary based on which customer journey sends the message.

Exercise: Preview and Test Send

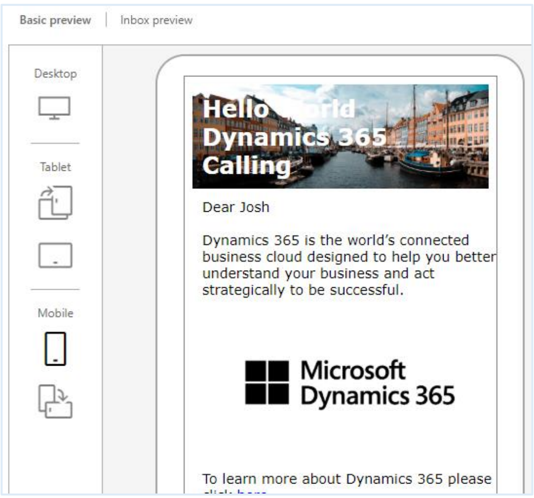
In this exercise you will preview your message and then perform a test send (i.e. send the message to yourself)

Your message now includes all the minimal required and recommended content

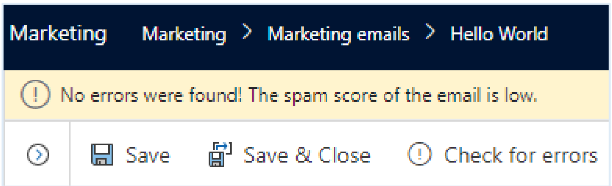
Go to the **Preview** tab to see an *approximation* of how the email will be rendered on various screen sizes and how its dynamic content will get resolved.



Use the buttons in the leftmost column to choose a device and orientation to preview



To make sure your message includes all required content and is ready to send, click **Check for Errors** in the command bar.



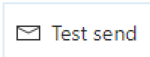
Dynamics 365 Marketing checks your message, and then displays results in the notification bar.

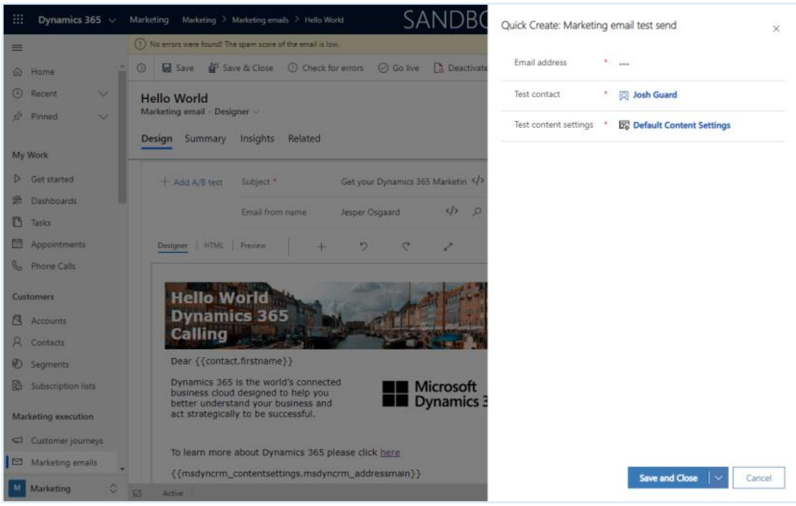
If errors, expand the notification bar to read the results.

If you followed this procedure, your message should pass the error check. If it doesn't, read the error message, fix the reported issue, and try again until it passes.

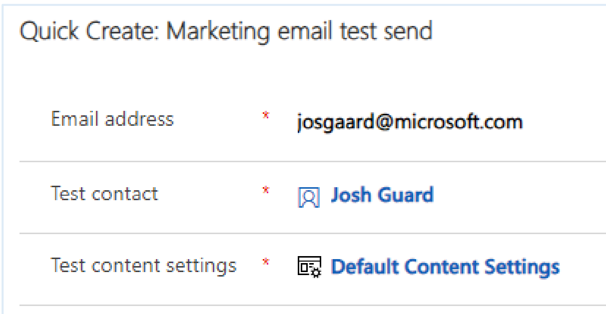
Until now, your previews and error checks have been simulated. The final test is to deliver the message to yourself, open it in your email program, and inspect the results.

On the command bar, click **Test Send** to open the **Quick Create: Marketing email test send** form



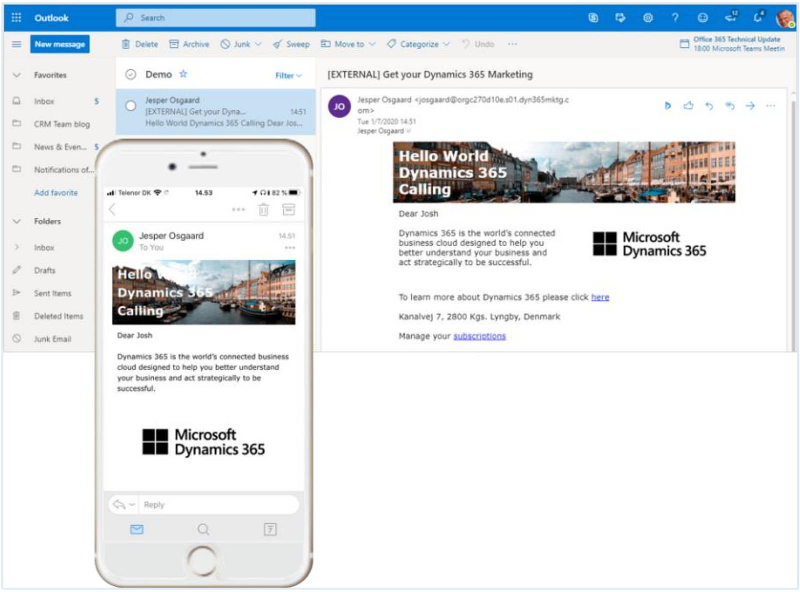


Enter your own **Email Address** in the field provided, and optionally select a contact for the **Test Contact** and Default Content Settings for **Test content settings** (test contact and test content settings are preselected and you can just use those)



Select **Save and Close** to close the form and send yourself the message.

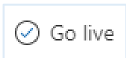
Check your inbox on your device(s) to verify the looks of the email is as expected. If not edit and repeat.



Exercise: Go Live

In this exercise you will publish the message (i.e. Go Live)

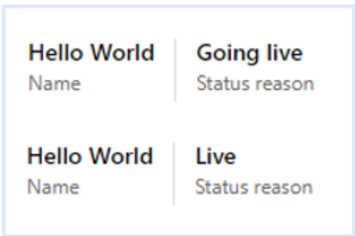
If your email message still looks good after you receive it in your inbox and open it, you're ready to publish it



Click **Go Live** on the command bar

Dynamics 365 Marketing copies your design to the email marketing service, which makes the email message available for use by a customer journey (but doesn't deliver any email messages yet).

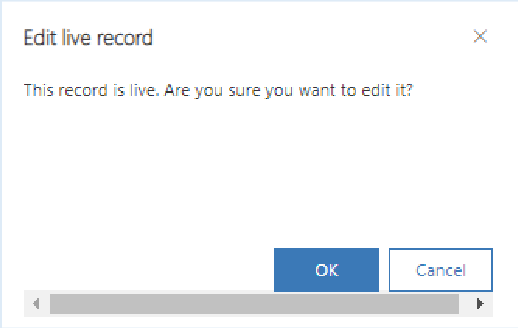
*The **Status Reason** of you email is updated from **Draft** to **Going Live** to **Live**.*



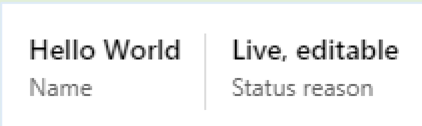
Tip

While the email message is live, it's locked for editing in Dynamics 365 Marketing.

If you need to edit a live email message, you must first open it in Dynamics 365 Marketing, then click **Edit** in the command bar, and confirm the edit.



If you confirm the edit prompt, the **Status reason** will change to **Live, editable** – and the email is editable until you click **Save**



See also

"Check your work using **previews** and **test sends**"
https://docs.microsoft.com/en-us/dynamics365/marketing/email-preview

"Quickly design and deliver a marketing email with **send now**"
https://docs.microsoft.com/en-us/dynamics365/marketing/email-send-now

"Design and run **A/B tests** on your email designs"
https://docs.microsoft.com/en-us/dynamics365/marketing/email-a-b-testing

"Preview: Check the **spam score** of your email content"
https://docs.microsoft.com/en-us/dynamics365/marketing/spam-score

"Use custom attributes to enable designer features in emails, pages, and forms"
https://docs.microsoft.com/en-us/dynamics365/marketing/custom-template-attributes

Lab 3: Create a simple customer journey

As you engage potential customers, they start by discovering your product, evaluate whether it meets their needs, look for a good offer, and finally make a purchase. We call this process the *customer journey*. Use Dynamics 365 Marketing customer journeys to create a model that helps you guide the members of a selected marketing segment through this process by using automated messaging, activity generation, interactive decision points, and more.

A simple customer journey can include just two steps:

1. identifying the target segment
   - and -
2. creating an activity that addresses the members of that segment

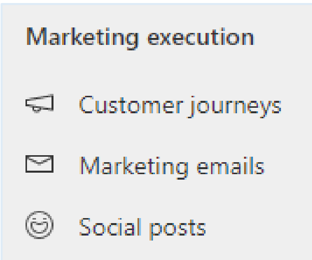
In the following exercise, you'll set up a simple customer journey that sends an email message to all the members of a target segment.

Before you start, you'll need:

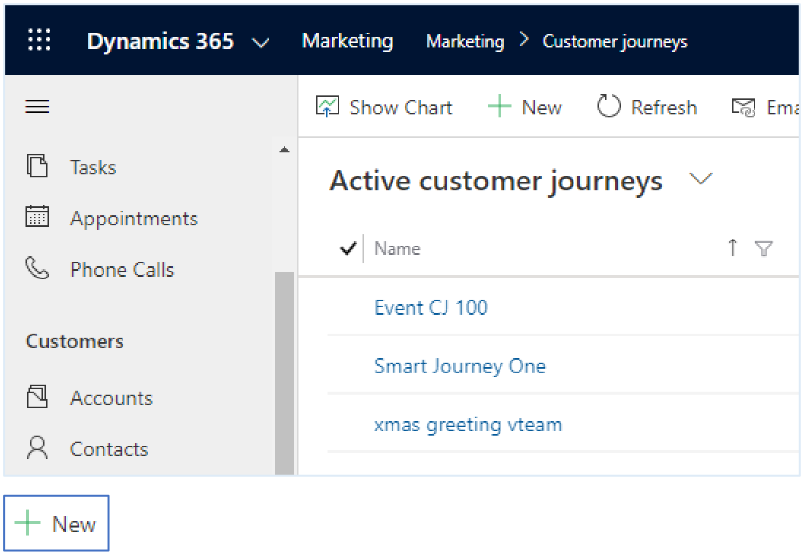
- A **segment** containing the contacts you will send your email to.
  Your segment should include just one or two fictional contacts with valid email addresses that you can receive mail from, like one of those you set up in the exercises above.
- A **marketing email** that is both valid and live.
  You should be able to use the email message you designed and published above

Exercise: Design a customer journey

Click **Marketing Execution** > **Customer Journeys** to open a list of existing customer journeys.



In the list of **Active Customer Journeys** click **New** to open the **New Customer Journey** form

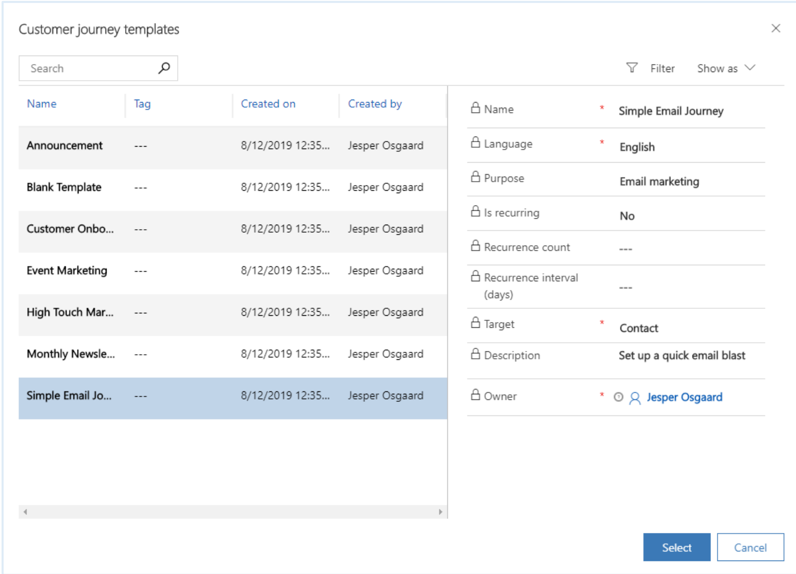


The **New Customer Journey** page opens with the **Select a Customer Journey Template** dialog box shown.

Each template provides a starting point for designing a particular type of customer journey. The template dialog box provides tools for searching, browsing, and previewing your template collection.

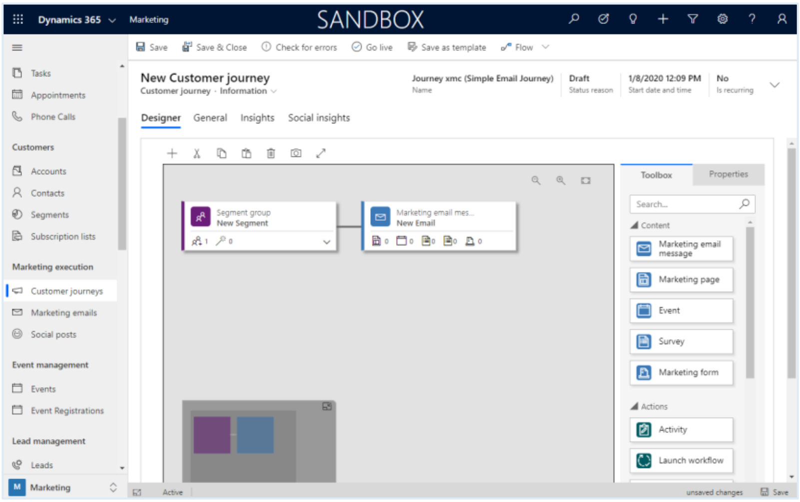
Select **Simple Email Journey** template, and then click **Select**.

The dialog box closes, and your selected template is copied to your new journey.



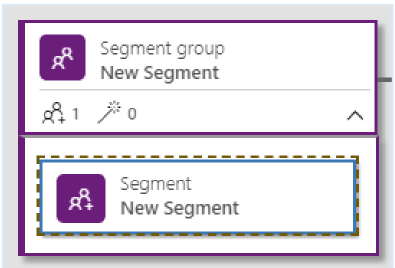
Now you are looking at the customer journey designer, where you will define each step of the journey.

You could add additional components to the customer journey by dragging and dropping them from the toolbox onto the canvas, but for this exercise we will stick with the two components added to the customer journey by the temple; a segment component and an email component

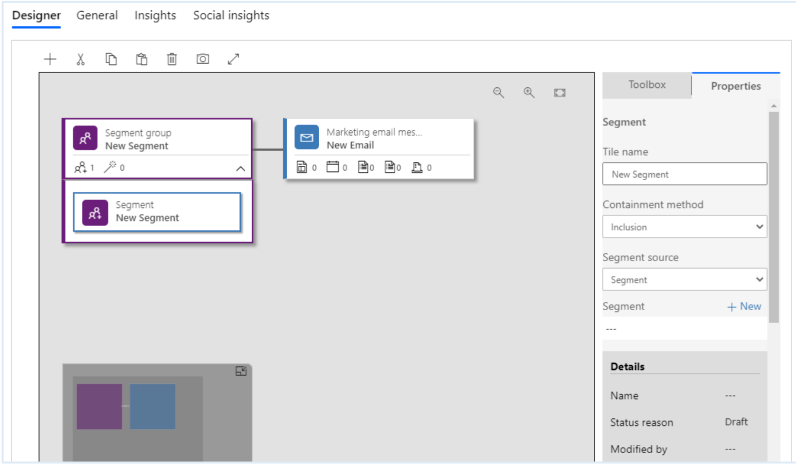


All customer journeys start with the participants, who in this case are the people you specify as part of a market segment

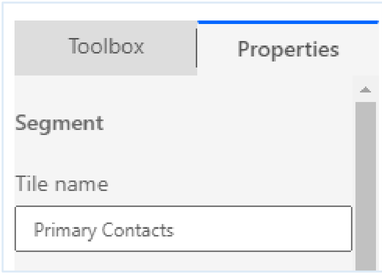
Expand the **Segment Group** tile and select the Child segment **New Segment**



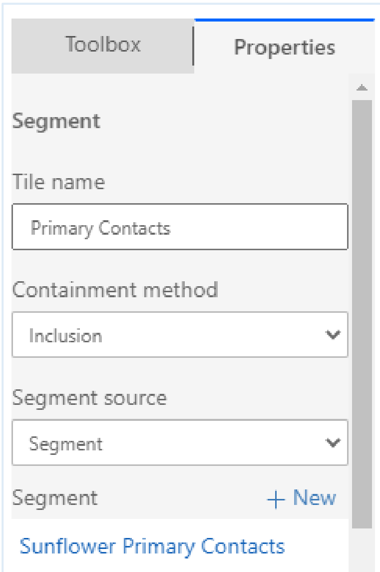
Select the **Properties** tab

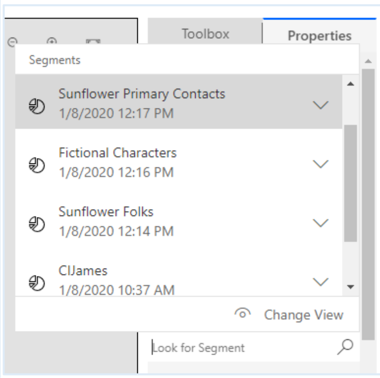


Type a name for your Segment in the **Tile name** textbox



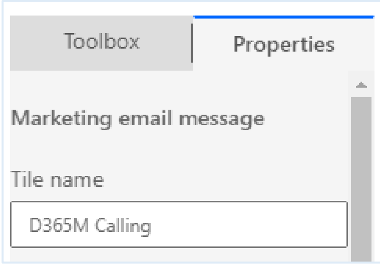
Select your segment in the **Segment** drop-down



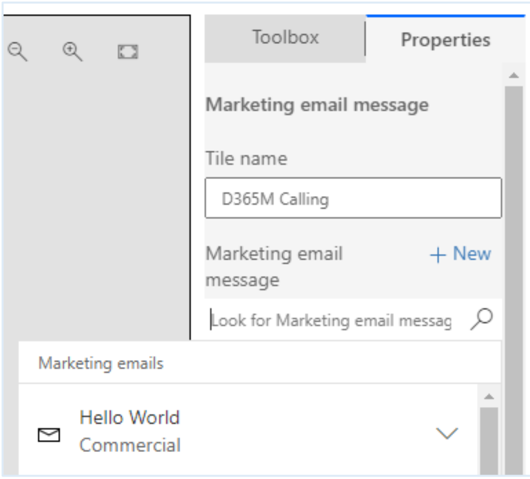


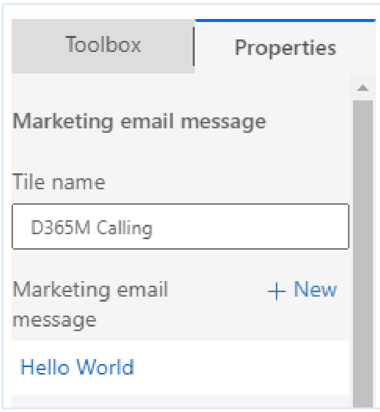
Select the **Marketing email message** tile

Type a name for your email in the **Tile name** box

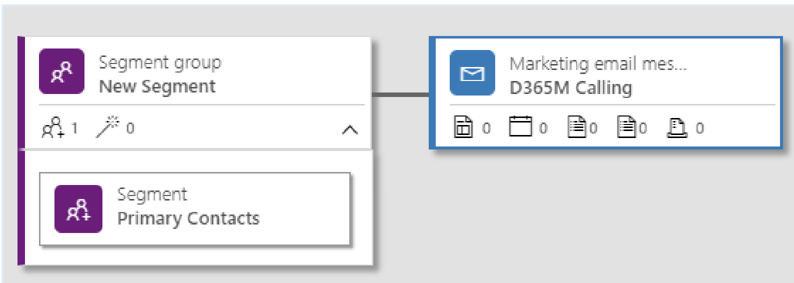


Select your email in the **Marketing email message** drop-down





Your customer journey tile now reflects the selections you made.

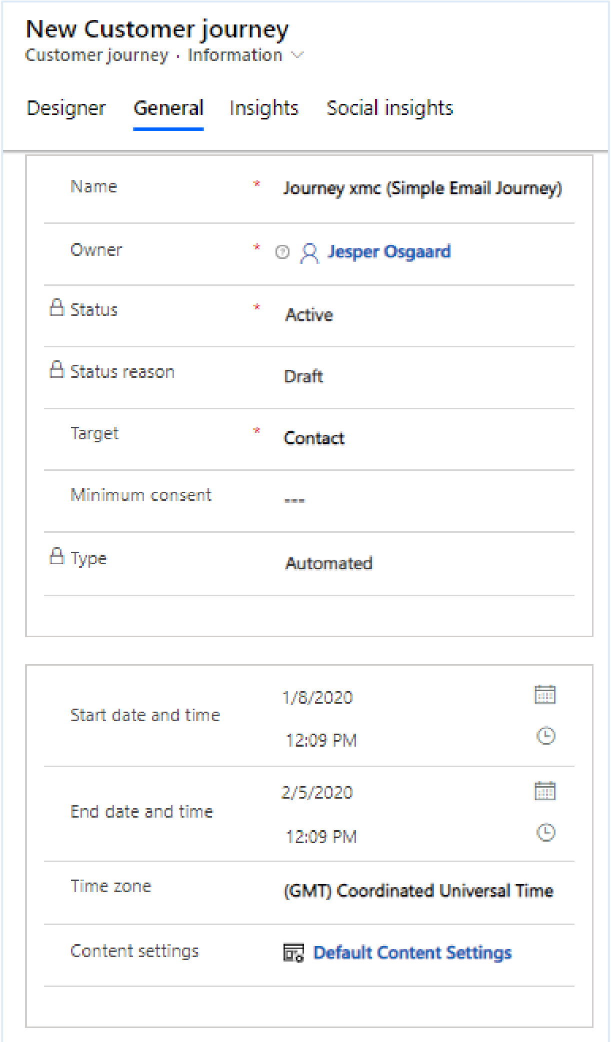


Tip	All the segments and email messages that you reference in your customer journey must be live before you can go live with the customer journey itself.

Exercise: Configure Run Schedule

In this exercise we will configure when our customer journey should begin processing contacts

Click the **General** tab to name your journey and configure its run schedule.



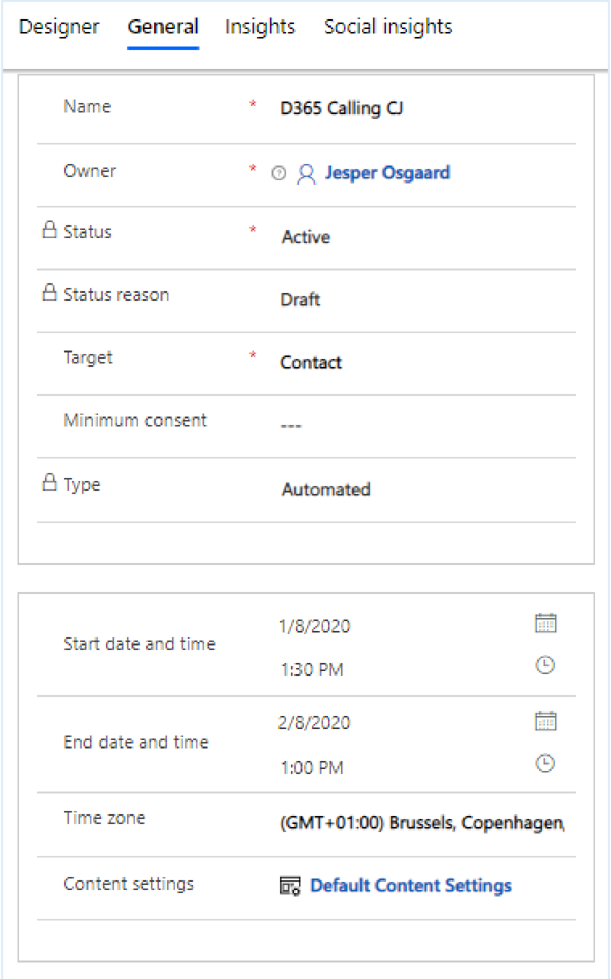
Make the following settings here:

Name: Enter a name for the customer journey that you can easily recognize later. This name is internal-only.

Time Zone: Select your local time zone (if needed). The other dates and times on the page will be displayed relative to this zone.

Start Date Time: Enter the time when the journey should begin processing contacts. When you select the field, a suggested default time is provided.

End Date Time: Enter the time at which the journey should stop processing contacts. All actions will stop at this time, even if some contacts are still in the middle of the journey. If you're just testing, allow a couple of weeks.

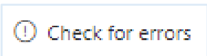


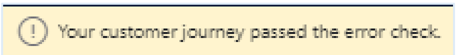
On the command bar, select **Save** to save the work you've done so far.

Exercise: Check for Errors and Go Live

In this exercise we will check the customer journey for errors and publish it (go live)

To make sure your journey includes all required content and settings, select **Check for Errors** in the command bar.





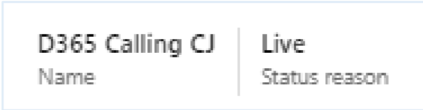
Dynamics 365 checks it and then displays results in the notification bar. Expand the notification bar to read the results.

If you followed this procedure and your email message is live, your journey should pass the error check. If it doesn't, read the error message, fix the reported issue, and try again until it passes.

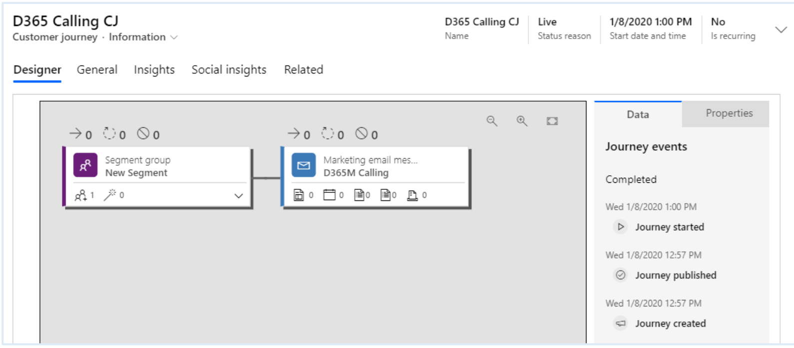
Your journey is now ready to go.

To start it running, publish it by selecting **Go Live** on the command bar.

*Dynamics 365 copies the journey to its email marketing service, which executes the journey by processing contacts, performing actions, and collecting results during the time it is set to run. The journey's **Status Reason** is updated to **Live**.*



*Note that the **Toolbox** pane changes name to **Data** and displays information about the journeys publishing status.*

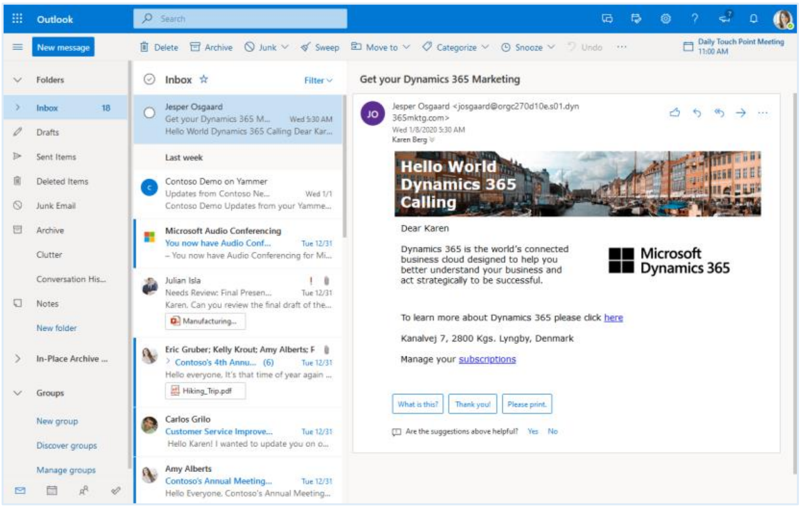


Exercise: Insights

Dynamics 365 Marketing keeps track of the way your contacts react to your various marketing initiatives and provides detailed analytical views to help you understand your impact and learn what works best.

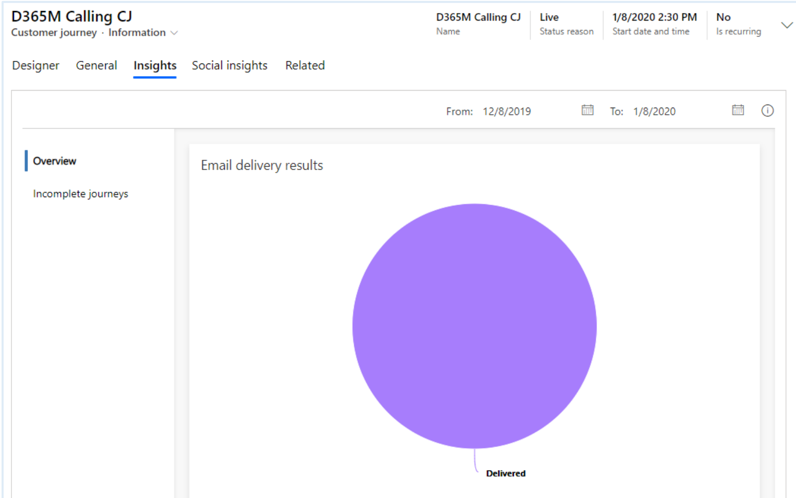
In this exercise we will look at the insights generated from the customer journey we launched above

After your marketing emails are delivered to your recipient inboxes, open (at least one of) them and load the images.

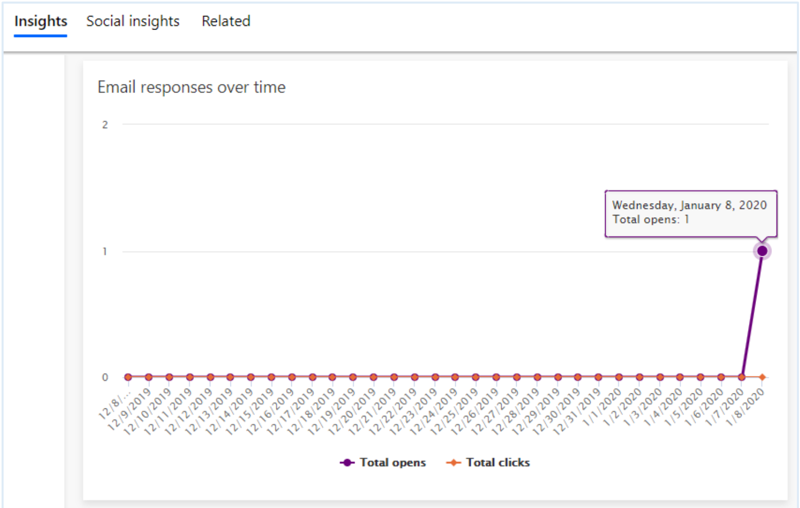


Open your customer journey in Dynamics 365 Marketing and switch to the **Insights** tab.

In the **Email delivery results** widget, you can check the percentage of your emails delivered (full pie equals 100%)

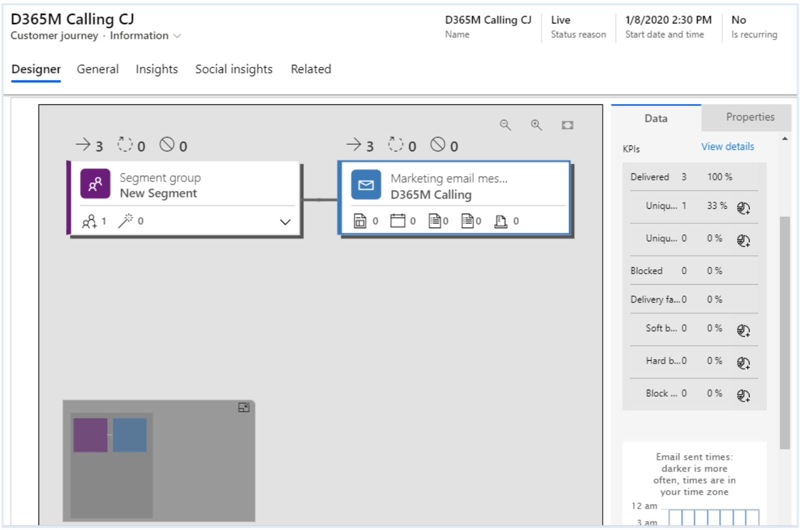


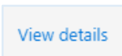
Scroll down to see the **Email responses over time** widget. Here you can see a timeline over responses.



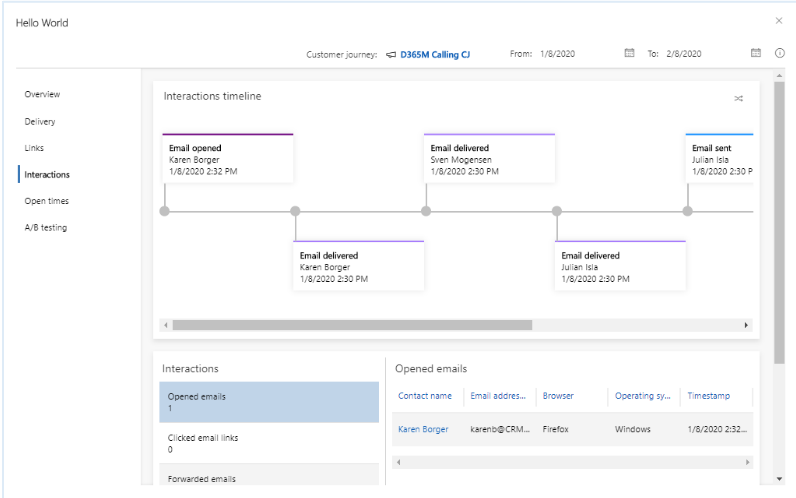
Switch back to the **Designer** tab and click the email tile top open all the KPIs for the email in the **Data** pane.

Click the **View details** link in the **Data** pane to open detailed statistics for the email in a separate window

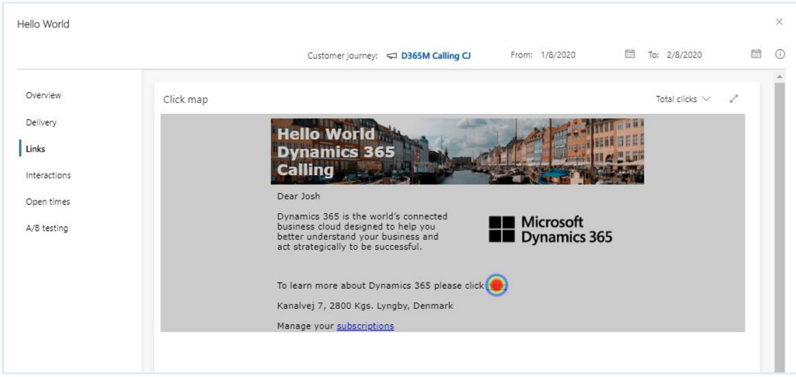




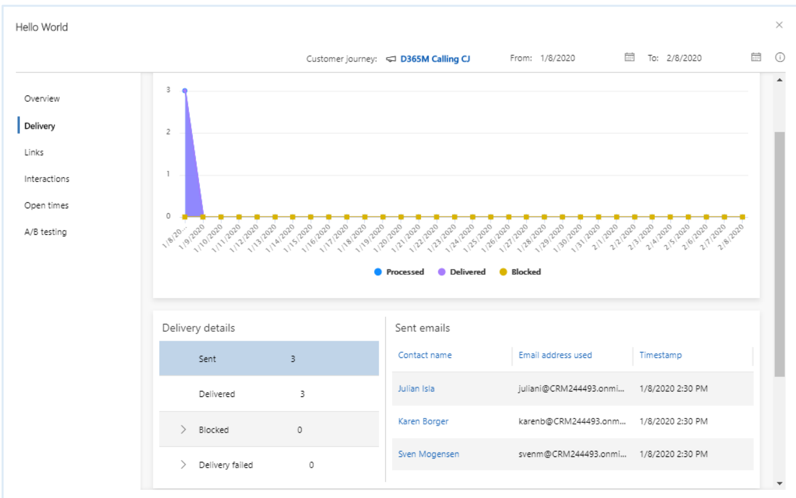
Click the **Interactions** tab to open an **Interaction timeline**, a grid of **Interactions**, and a grid listing the names of the contacts who **Opened emails**



Click the **Links** tab to open a **Click map** showing a heatmap of the links in the email



Click the **Delivery** tab to open a **Delivery progress**, a grid of **Delivery details**, and a grid listing the names of the contacts who where **Sent mails** to

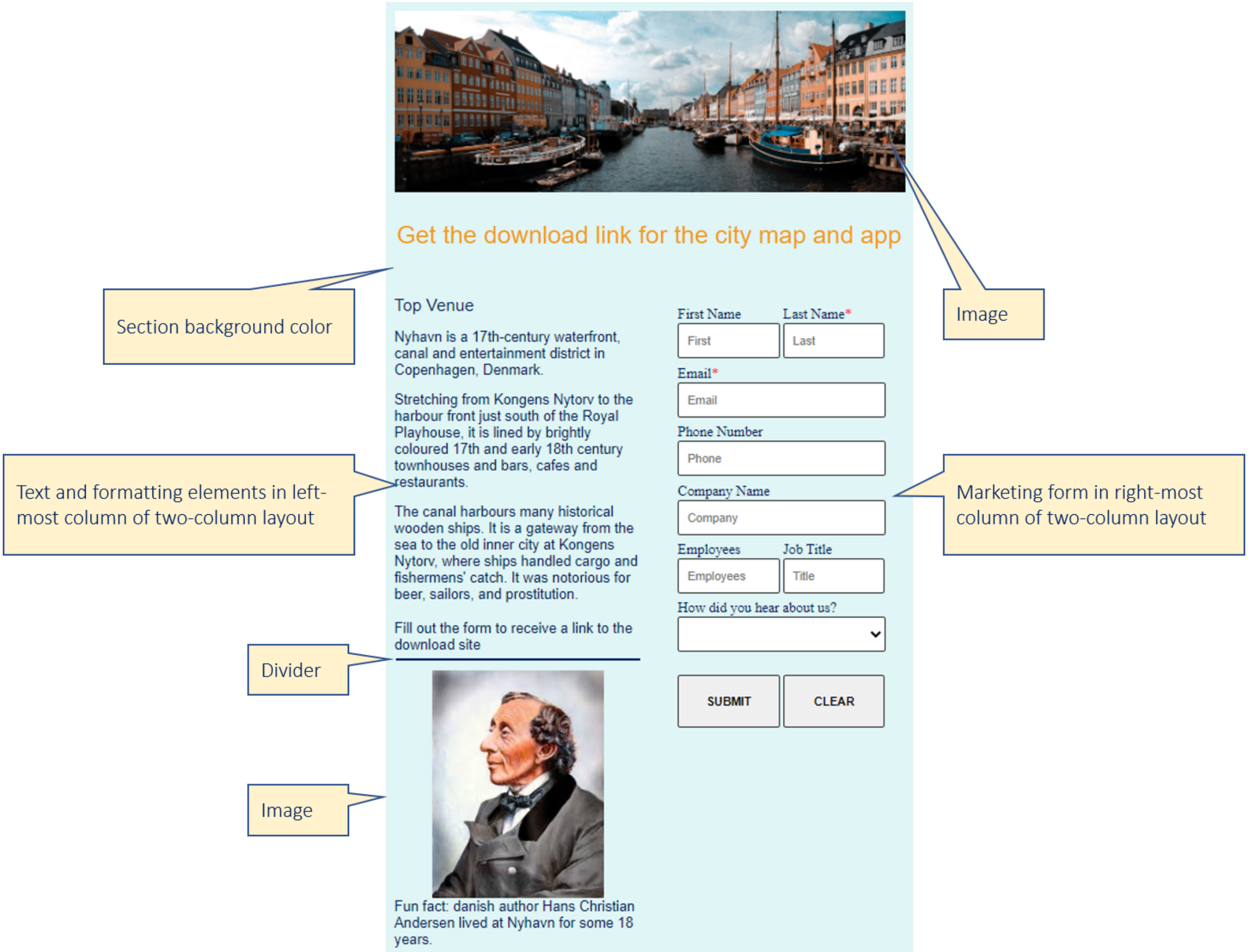


See also	"Analyze results to gain insights from your marketing activities" https://docs.microsoft.com/en-us/dynamics365/marketing/insights

Lab 4: Create a marketing page with a form

A marketing page is a webpage that includes a form where people can register for an offer, update their contact information, manage mailing list subscriptions, and more. All the information submitted through a marketing page is automatically captured by Dynamics 365 Marketing and applied immediately to your customer database.

Marketing pages integrate with—and provide expanded functionality for—many other Dynamics 365 Marketing features, including email marketing, customer journeys, behavior analysis, lead scoring, and result analytics In this exercise we will build a marketing page with several elements in it, most notably a marketing form to capture information about visitors to the page.

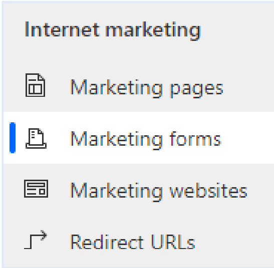


Exercise: Create an input form

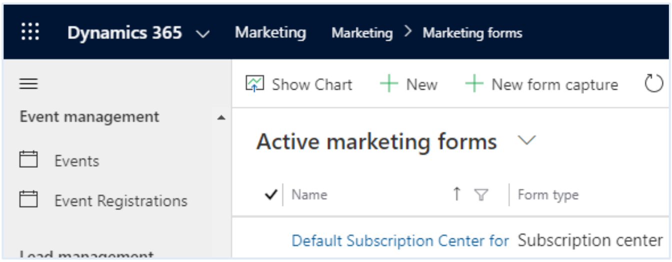
We will start out by building a marketing form to add to the marketing page. A marketing form is made from a collection of fields, buttons, graphical elements, and a few configuration settings

In this exercise we will select a built-in template and modify it a bit.

Navigate to **Internet Marketing** > **Marketing forms** to open the list of **Active marketing forms**

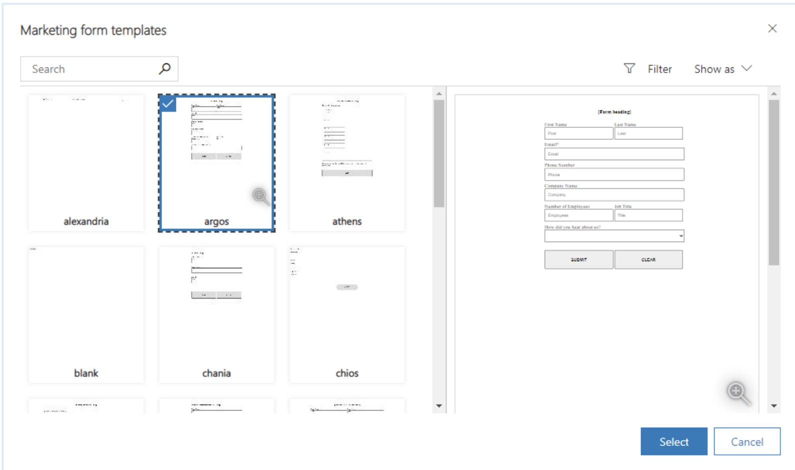


In the list of **Active marketing forms** click **New** to open the **New Marketing Form** page



*The **New Marketing Form** page opens with the **Marketing form Templates** dialog box shown.*

Select the **argos** template, and then click **Select**.



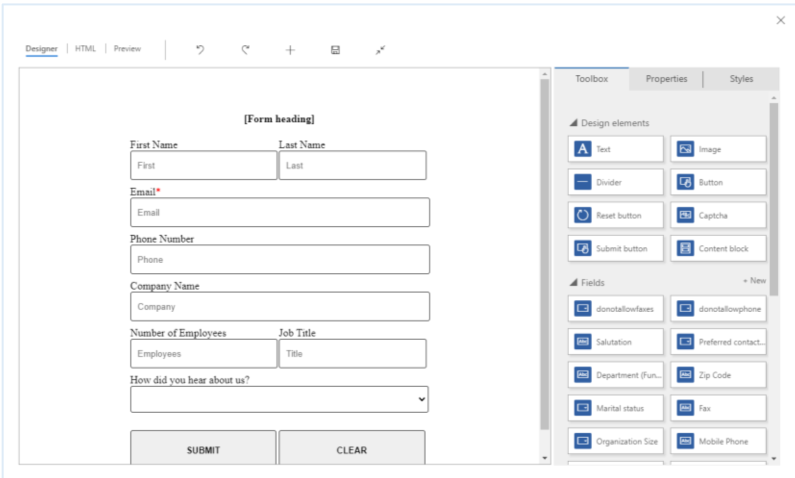
The template dialog box closes, and your selected template is copied to your new form.

You are now looking at the form designer, which works like the email designer.

You can drag components from the Toolbox pane on to the canvas if needed (just like when you designed your email in the exercise above)

For this exercise we got all the fields we need though.

We will get rid of the [Form heading] placeholder, and we will make the Last Name field required

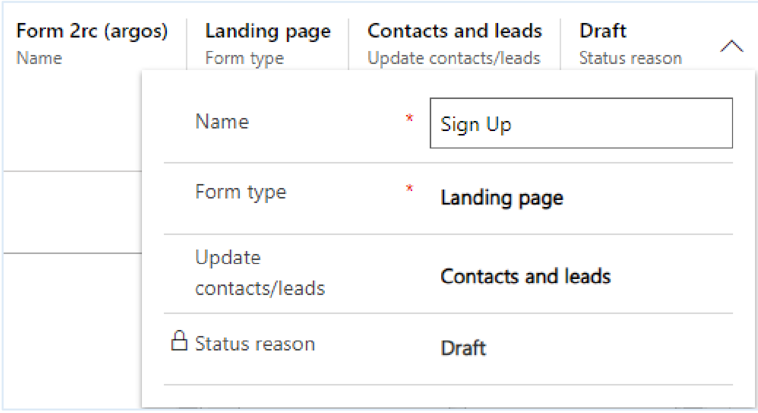


*In the top right corner, you can accept or edit the required fields (**Name** and **Form type**), as well as select what records the form will update.*

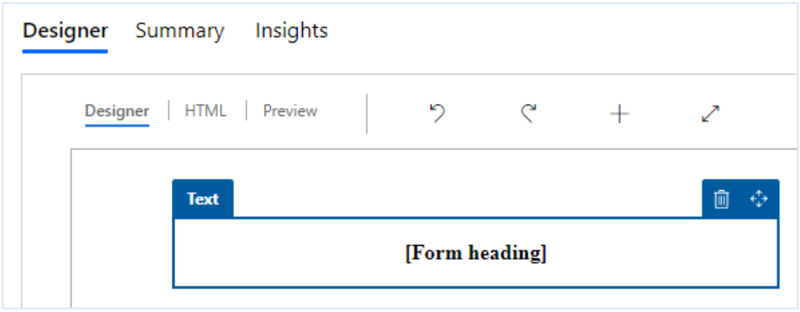
Name: This is an internal name for your form. Type a name of your choice.

Form Type: Different types of marketing pages require different types of forms. You're making a marketing page, so set this (or leave it set) to **Marketing page**.

Update Contacts/Leads: Set this (or leave it set) to **Contacts and Leads**. This means that Dynamics 365 Marketing looks for existing contacts and leads that match submissions from this form and will update any existing contacts and leads or create new ones.



Select the form heading placeholder and click the delete icon to delete the placeholder

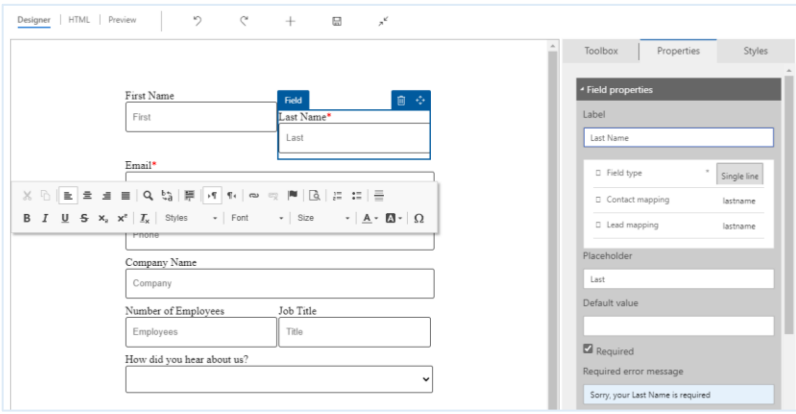


Select the **Last Name** field on the canvas to open the **Properties** pane.

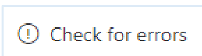
Check the **Required** checkbox.

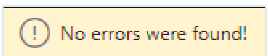
Provide a **Required error message** in the textbox below the checkbox

Note that the red asterisk appears next to the Last Name label in the canvas when the box is selected and goes away when it's cleared. Make sure the email field is marked as required too.

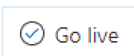


On the command bar, select **Check for Errors**, and then fix any problems that are reported just as you did with the email message and customer journey.





On the command bar, select **Go live**



The marketing form is now published and ready to be add to marketing pages

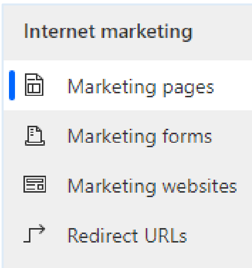
Tip	You can embed your Dynamics 365 Marketing Forms on your own CMS, e.g. Sitecore. An embedded form is a marketing form that you design using the Dynamics 365 Marketing form designer, and which you then embed on an external page using JavaScript code generated for you “Embed a Dynamics 365 Marketing form on an external page” https://docs.microsoft.com/en-us/dynamics365/marketing/embed-forms#embed-a-dynamics-365-marketing-form-on-an-external-page

See also	“Create, view, and manage marketing forms” https://docs.microsoft.com/en-us/dynamics365/marketing/marketing-forms

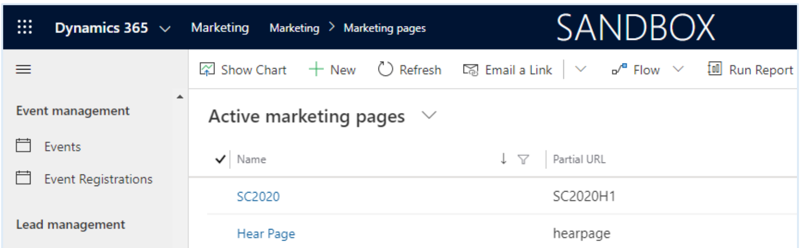
Exercise: Create marketing page

Now you're ready to use your new form on a marketing page.

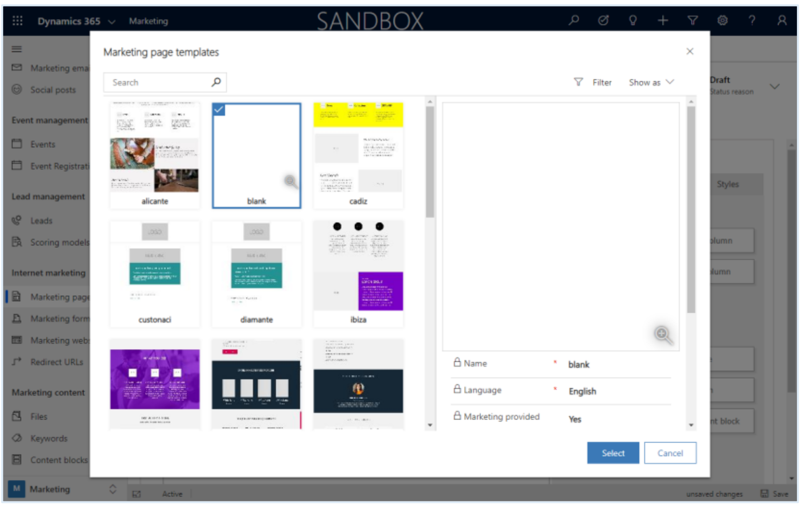
Navigate to **Internet Marketing** > **Marketing Pages** to open the list **Active Marketing Pages**



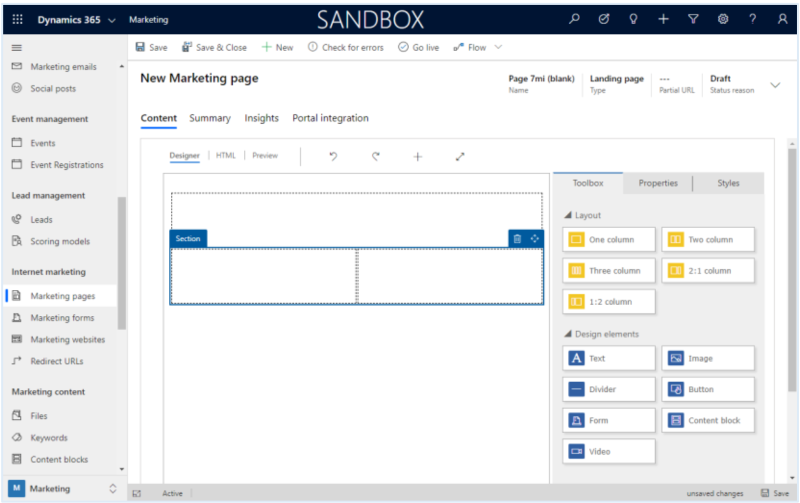
In the list **Active marketing pages** click **New** on the command bar to open the **New marketing page** page.



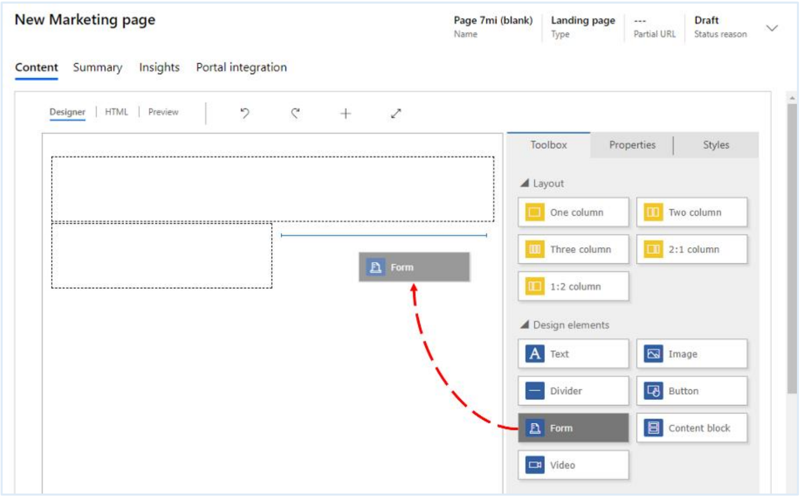
In the **New marketing page** page, the **Marketing page templates** dialog box opens automatically



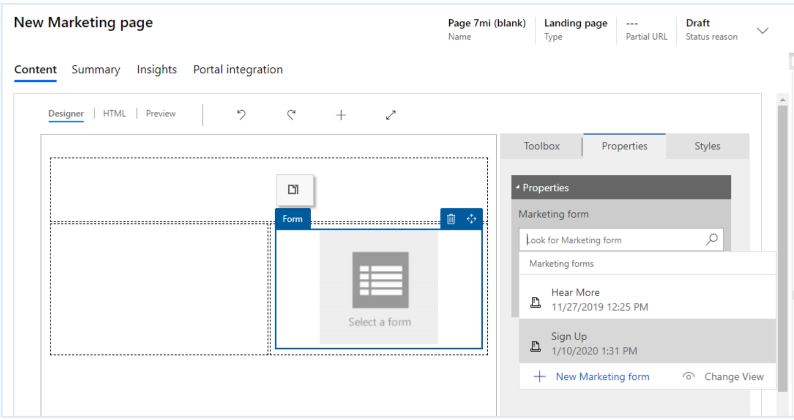
Drag a two-column section onto the canvas



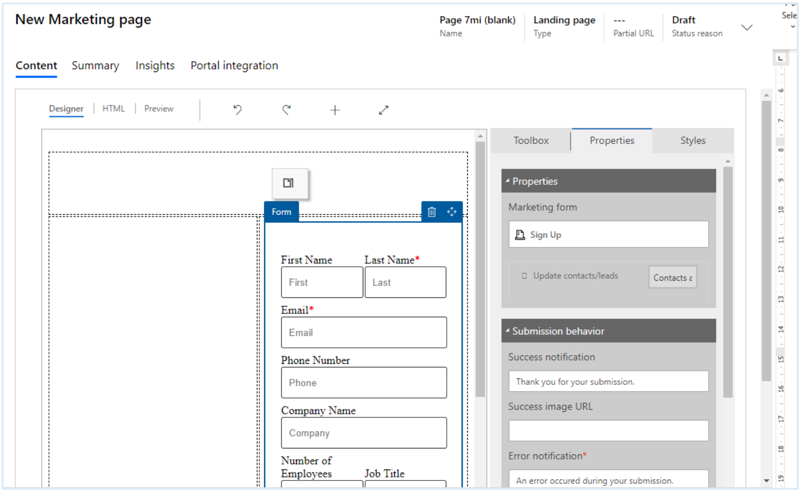
Drag a **Form** design element onto the canvas in the right most column



In the **Properties** pane select your marketing form



The form is inserted into the page



As with the form designer, there are required fields at the top of the page.

Enter the following:

Name: Enter a name for the page that you can easily recognize later. This name is internal-only

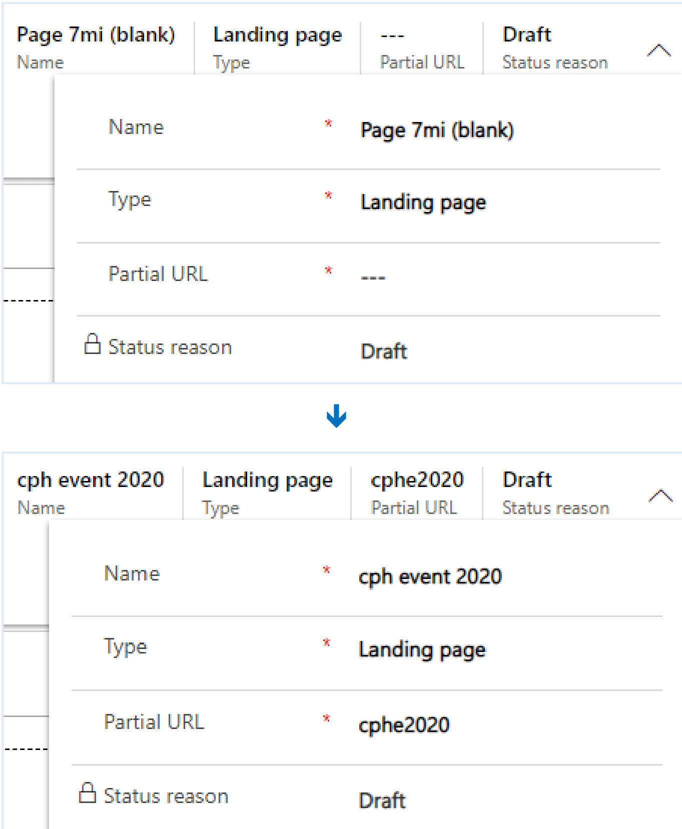
Type: Make sure this is set to **Marketing page**

***Partial URL**: When you publish the page, this value you type here becomes part of the marketing pages URL. The marketing page will be published on your Dynamics 365 Portal Server (microsoftcrmportals.com), so the final URL for the page will have the form:*

https://<*YourOrg*>.microsoftcrmportals.com/*<PartialURL>*.

Enter a suitable **Partial URL**, e.g. **cphe2020**

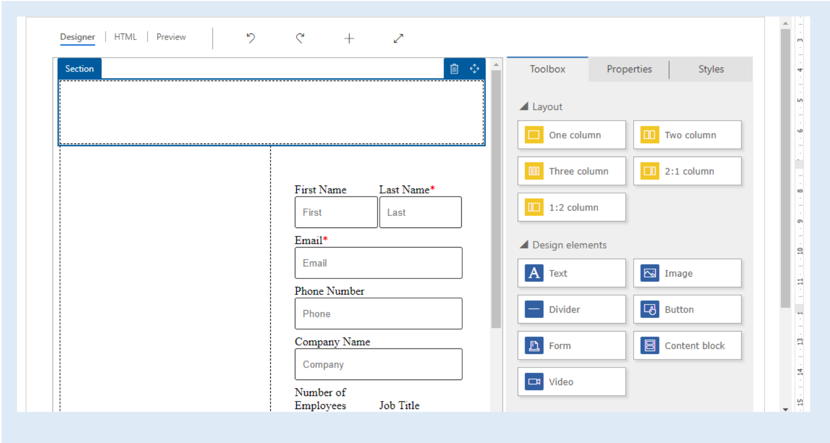
(note that contacts might notice this text when they load your page).



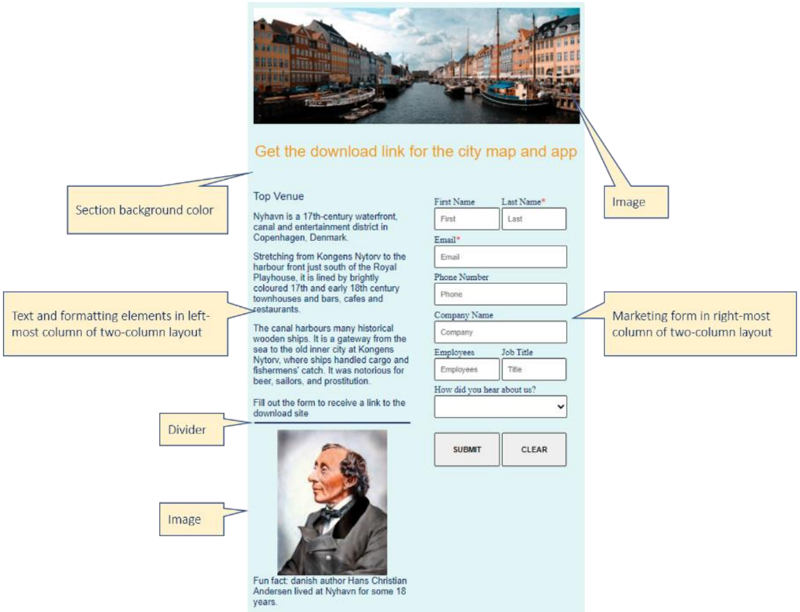
Exercise: Design marketing page

The marketing page designer resembles the form and email designers. As with email messages, you can add new sections, design elements, edit text directly on the canvas, and configure blocks by selecting them and using the **Properties** pane. In a real project, you would spend time now working with all these settings to create and style your content.

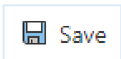
Design the marketing page using the same techniques you used when designing your email



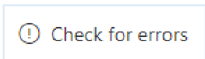
- *Drag an image design element onto the canvas in the top section*
- *Drag a Text design element onto the canvas in the top section below the image (to hold the header text)*
- *Drag one or more design onto the canvas in the leftmost column (texts, images, dividers etc.) to suit your desired design*
- *Change the background color of the sections*



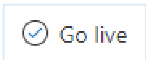
As you did with the other items you created, select **Save** on the command bar.



Then select **Check for Errors** and read the results in the notification area. Address any issues and recheck until your design passes.



Finally, choose **Go Live**. If the command is successful, your page will be published and available on the internet.

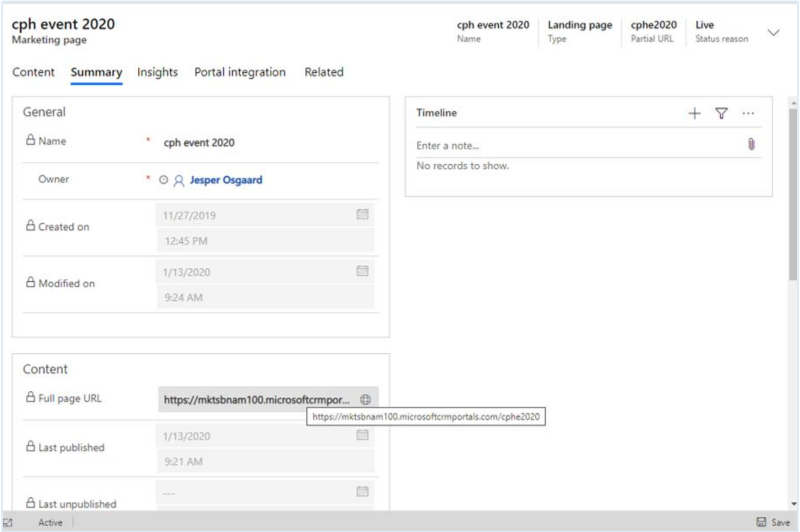


Exercise: Submissions and Insights

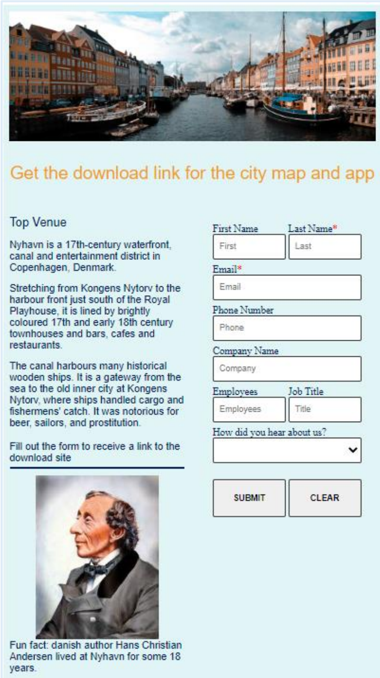
On the marketing page click the **Summary** tab.

*Here you'll find information about your page, a **Timeline** where you can add notes and track its development, and links to various related records.*

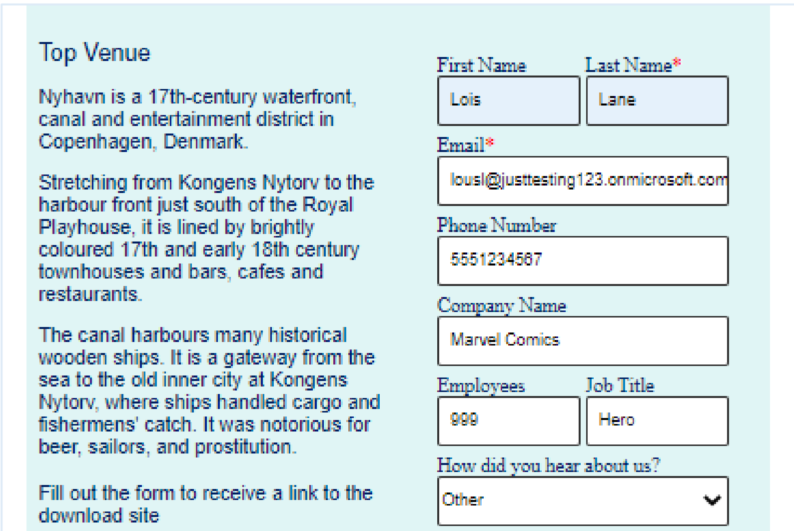
*You'll also find the **Full Page URL** in the **Content** section.*



Select the preview button at the right side of the **Full Page URL** field to open the page.

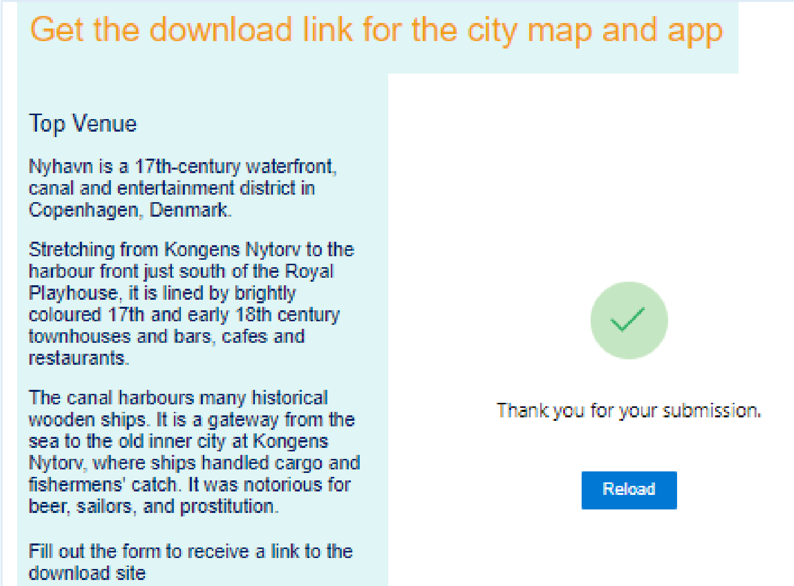


To test the contact and lead generation capabilities of the marketing page and form, enter information in the form fields and click the **Submit** button to submit the information.

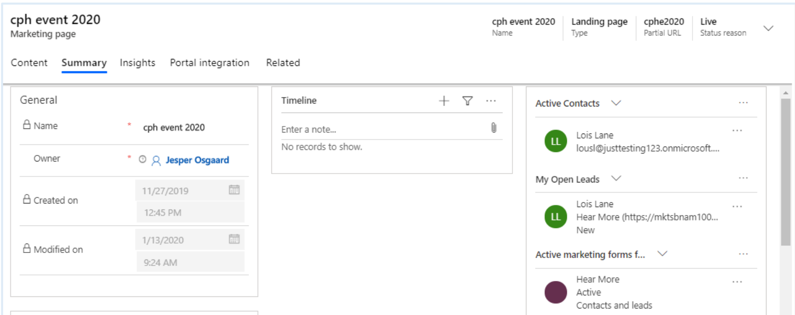


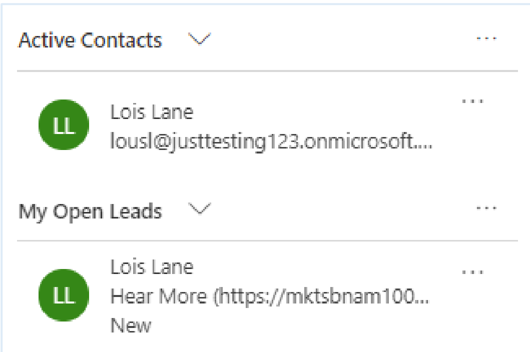
The form displays the submission message to acknowledge the submission

You can define this message in the ***Submission behavior*** *widget in on the* ***Summary*** *tab of the form*



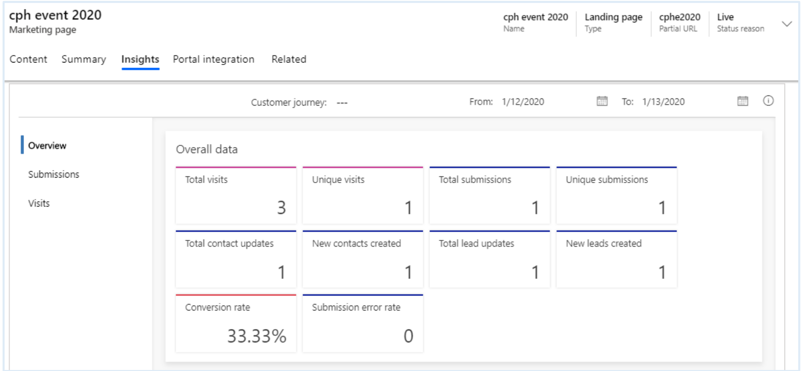
On the **Summary** tab of the marketing page we now see a new entry under **All Leads**

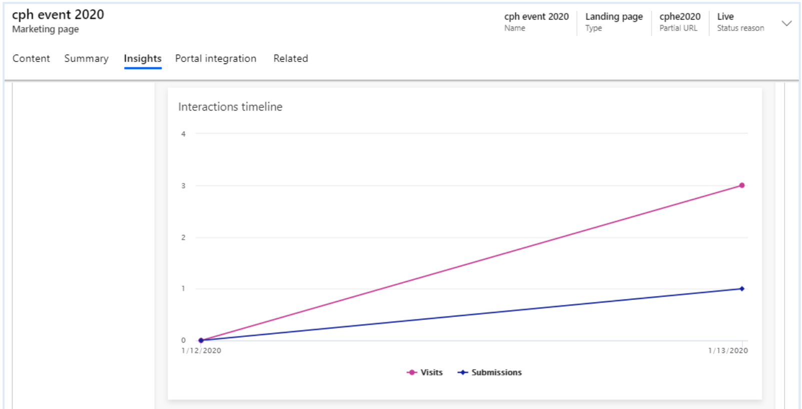




*As people interact with your page, information will become available on the **Insights** tab, including lists of contacts who visited and submitted the form on the page and analytics about its performance.*

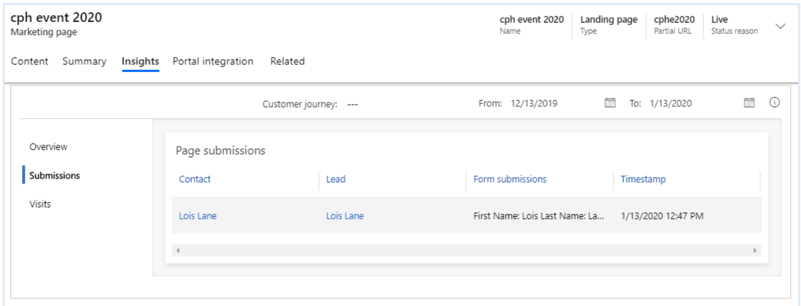
Click the **Insights** tab to see more insights



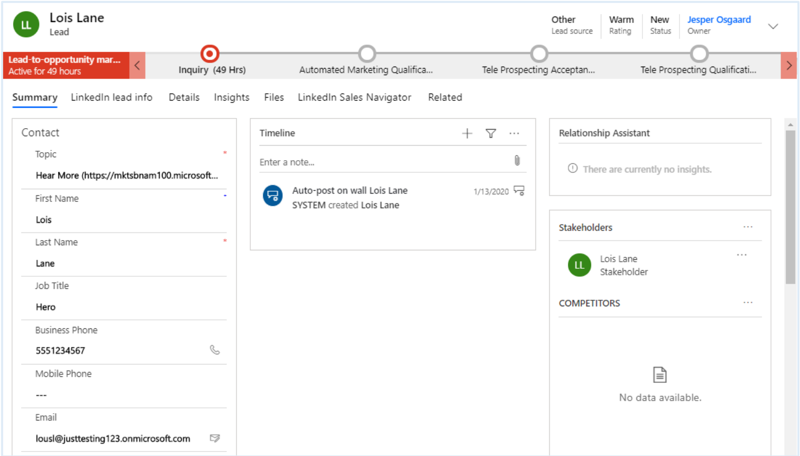


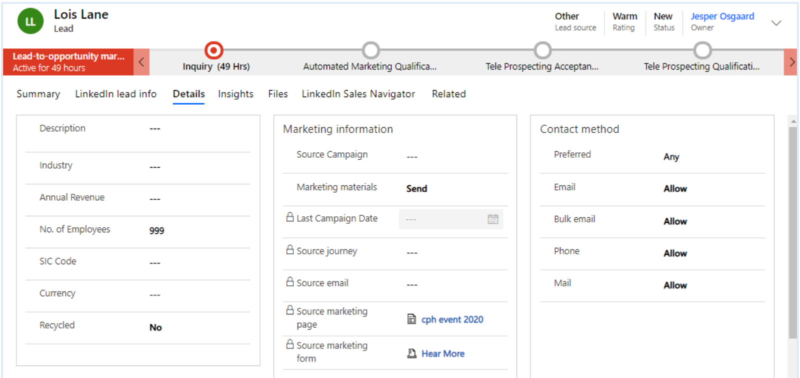
Click the **Submissions** sub tab

You should see your test submission on the Submissions tab here



Finally we can verify the form also created a lead with the metadata from the form (including "number of employees", "lead source" etc.) as per the setting of the marketing form (Update contacts/leads)





Important	The marketing-page feature described in this exercise requires that you have a Dynamics 365 Portal associated with your Dynamics 365 Marketing instance

See also	"Create and deploy marketing pages" https://docs.microsoft.com/en-us/dynamics365/marketing/create-deploy-marketing-pages

Lab 5: Create an interactive customer journey with triggers and signup

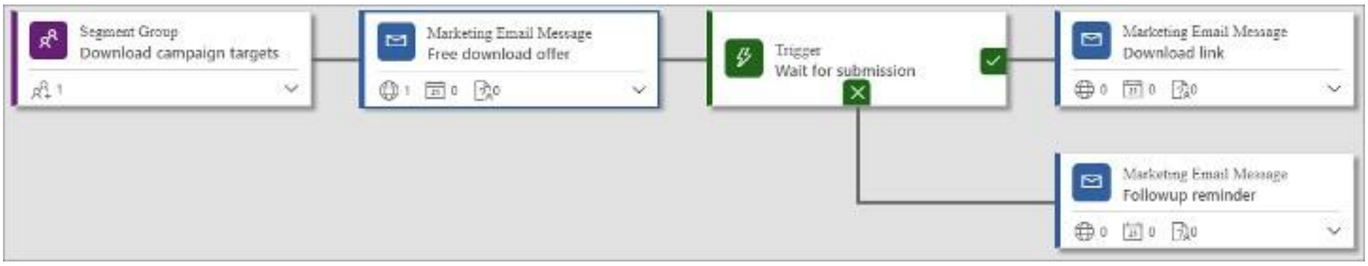
In a previous exercise we created the simplest possible customer journey, which simply sends an email message to all contacts in a segment.

Now we'll go a bit deeper into customer journeys to see how to add interactive features and decision points by including multiple emails, a marketing page, and a trigger in the design.

The journey starts with an email and a trigger, and then branches after the trigger. The initial email will invite recipients to pick up a free download from our website

The top branch handles the ‘positive’ outcome; recipients who clicks the link a marketing page and requests a download link. Those recipients we will send a download link email message after the request is submitted and received.

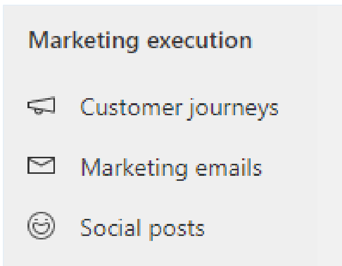
The bottom branch handles the ‘negative’ outcome (no response for a few days). In that case we will send a *A follow-up email message*: This email message will be sent if a contact does not submit the form after a few days.



Exercise: Email inviting recipients to pick up a free download from website

In this exercise the focus is not so much on the design of the email – so we will save some time and leverage on of the the built-in templates as a starting point. The important thing in this exercise is adding a button to the mail from the toolbox for recipients to click.

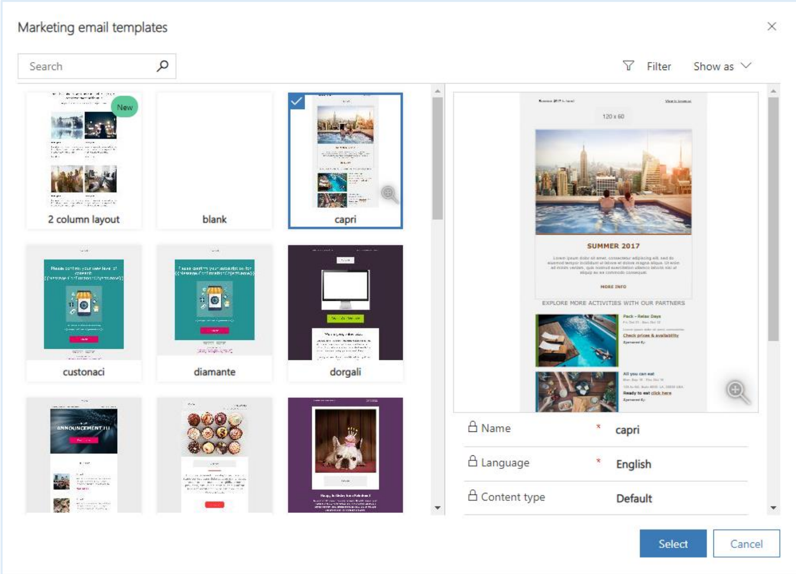
In the sitemap go to **Marketing Execution** > **Marketing Emails** to open the list of **Active Marketing Emails**



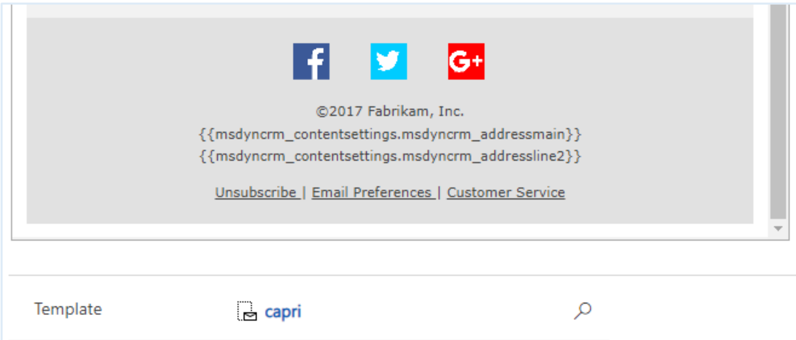
In the list of **Active Marketing Emails** click **New** to open the **Marketing email templates** dialog

This time we will start with a non-blank email template, e.g. the “capri” template.

Each template provides a starting point for designing a particular type of email message. The template dialog box provides tools for searching, browsing, and previewing your template collection



This template not only have sample content, graphics, and column layouts, but also include all mandatory elements such as the subscription center link and physical address.



This (first email message of your journey) email message will invite recipients to pick up a free download from your website.

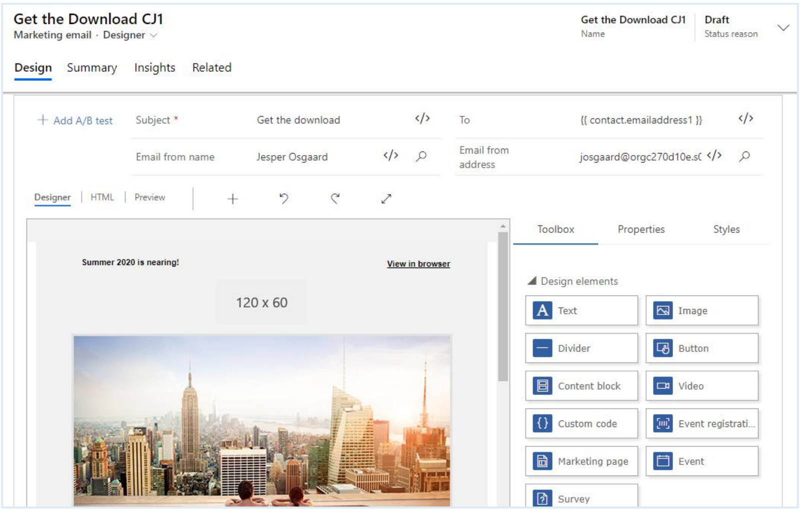
To get the free download, they'll need to visit the marketing page, submit a form, and then wait for a follow-up email that contains the download link.

Type a name for the email

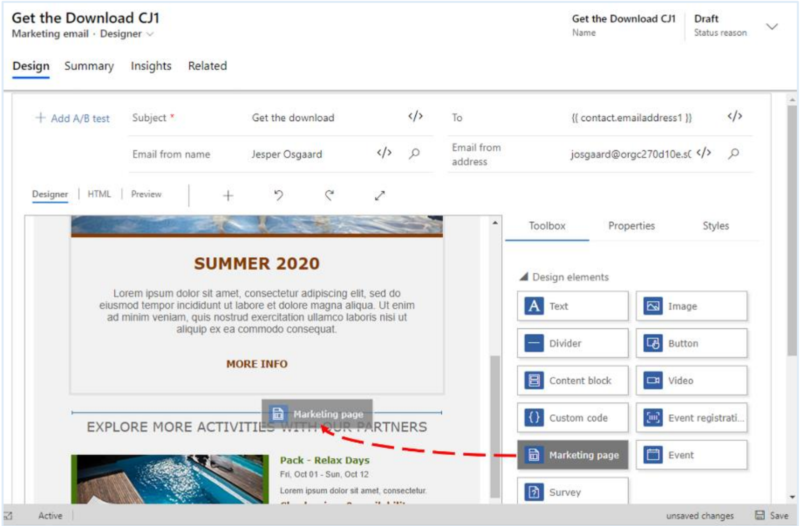
Type a Subject for the email

Add a placeholder for the contacts first name (optional)

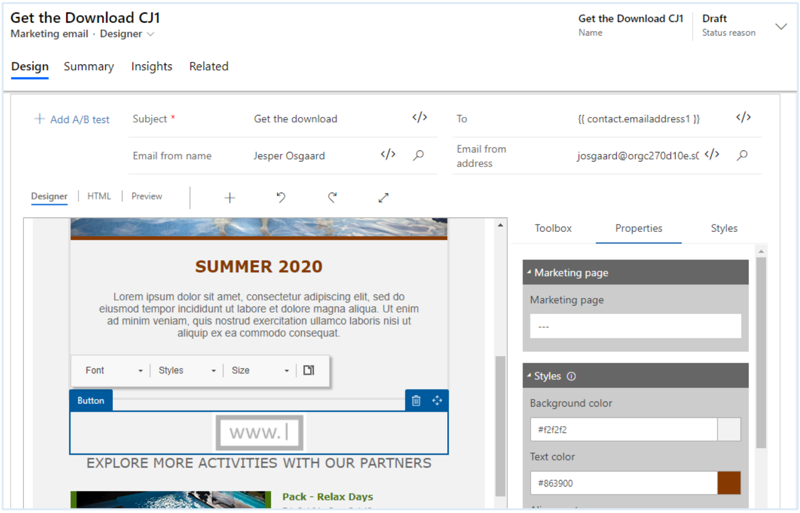
Add an instruction to download (optional)



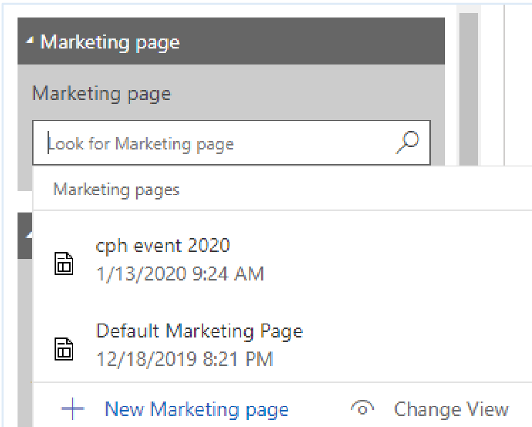
With your new email message still open, drag a **Marketing Page** design element from the **Toolbox** onto the design canvas.



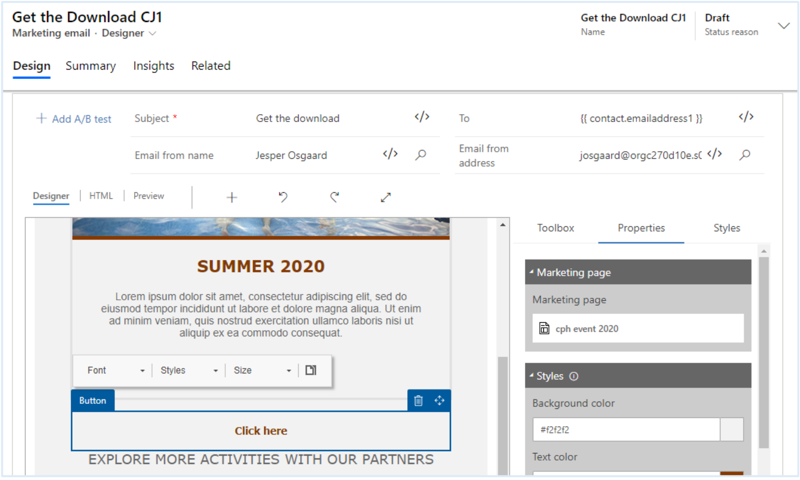
When you drop the **Marketing Page** design element in place, it's automatically selected, and the **Properties** pane opens to show its settings.



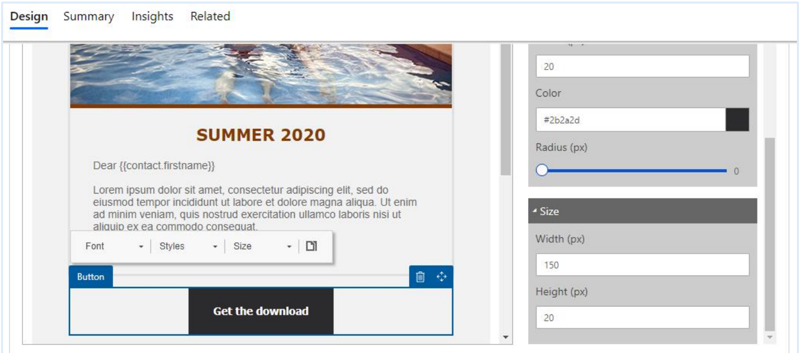
In **Marketing Page** drop-down select the marketing page you created in the exercise above (or any valid marketing page).



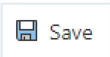
You now have a (large) button with a text saying, “Click here” (if clicked the recipient is taken to the marketing page).

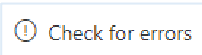


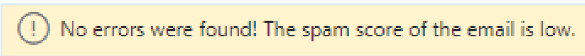
You can freely change the text of the button, as well as change its properties (width, background color etc. in the ***Properties*** *pane)*

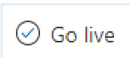


As before, **Save** your email message, click **Check for Errors**, fix any issues, and then **Go Live**









Exercise: Emails with link and follow up message

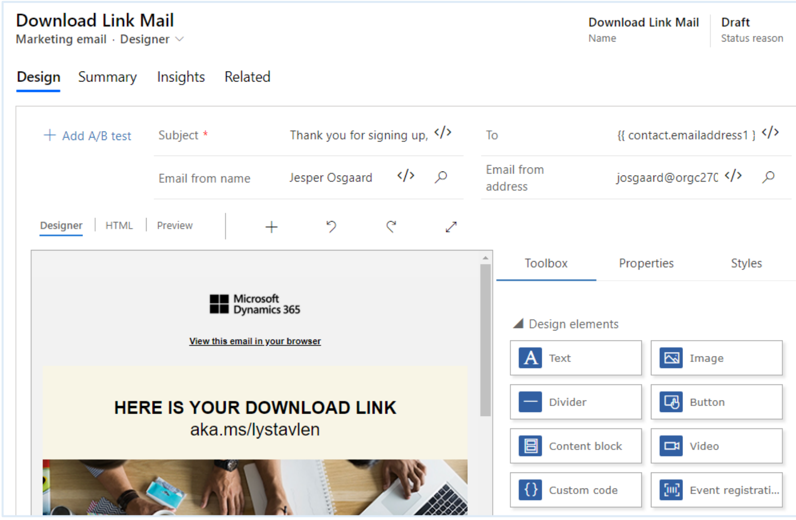
In this exercise we will quickly create two more mails using the built-in marketing mail templates. One email to send to those who fill out the form on the marketing page, and another email to send a reminder to those who haven’t submitted the form after a while. We won’t worry too much about the content of those mails for now, they are merely mails we need to test the customer journey

A download link email message: This email message will be sent after a contact submits the form on the marketing page.

Let the subject be **Thank you for signing up, here's your download link!** but don't worry too much about the content for now.

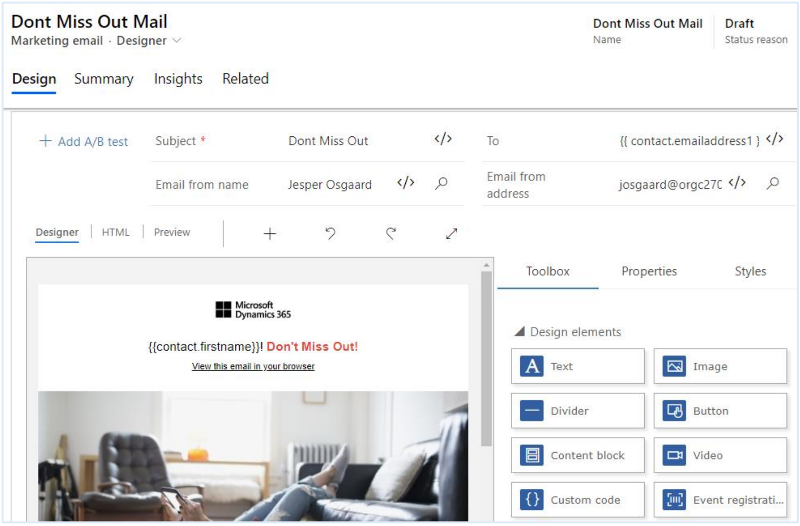
(In a real project, you would include a link to the promised download here.)

Save, Check for Errors, and Go Live



A follow-up email message: This email message will be sent if a contact does not submit the form after a few days. Let the subject be **Don't miss out!**, but don't worry too much about the content for now. (In a real project, you would repeat most of the original offer here.)

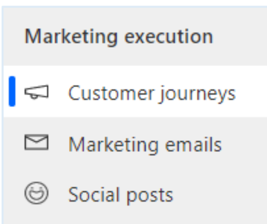
Save, Check for Errors, and Go Live



Exercise: Create customer journey

We now have the thee mails needed for the customer journey in place. Next up is to create the journey. Along with the three mails we will also leverage one of the segment we built in "Lab 1: Create dynamic segments" and the marketing page and form we built in "Lab 4: Create a marketing page with a form" - so the main task in this exercise is to compose the journey (dragging the relevant design elements onto the canvas, and subsequently configure those)

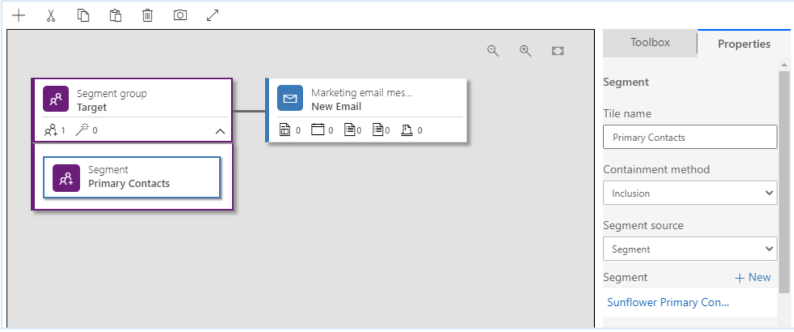
Go to **Marketing Execution** > **Customer Journeys** and create a new customer journey based on the **Simple Email Journey** template like the one you made in "Lab 3: Create a simple customer journey" above.



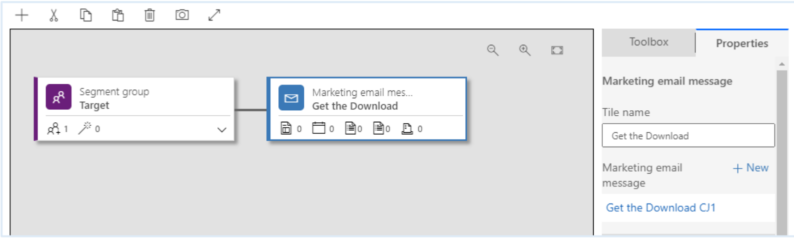
Expand the Segment Group tile and select the Child segment **New Segment**

Select the **Properties** tab

Select your segment in the **Segment** drop-down (the segment of test contacts you made in the exercise above)



Click the **Email** tile right after the **Segment Group** and configure it to reference the first email message you made for this exercise (with the marketing page button).

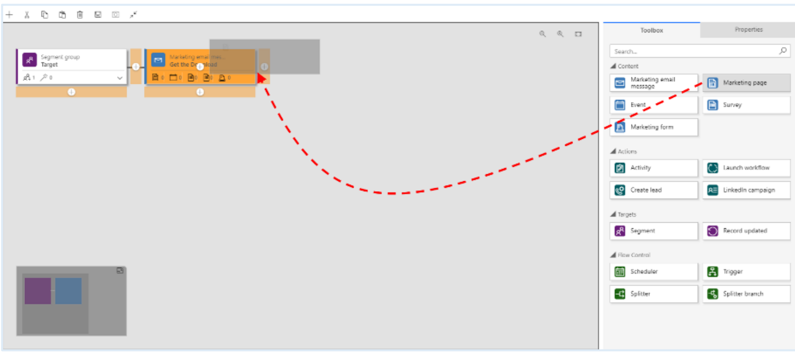


Exercise: Add a marketing page

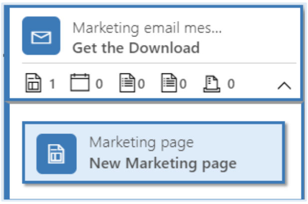
Although your email message includes a link to a marketing page, the journey is not aware of that link, nor even of the marketing page itself.

This journey should react to marketing page submissions, so you need to reference the page and link it to the email message by adding a marketing-page tile as a child to the email tile.

Drag a **Marketing Page** tile from the **Toolbox** and drop it directly on top of the **Marketing Email Message** tile.

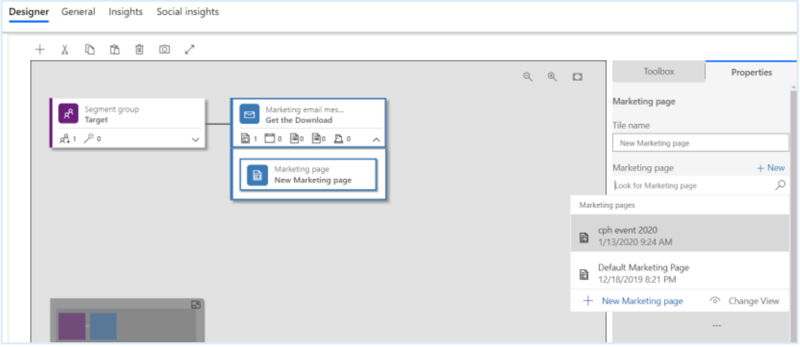


To see **Marketing Page** tile that you just added expand the **Marketing email message** tile by choosing the expansion button in its lower-right corner.



Select the **Marketing page** tile, open the **Properties** pane, and make the following settings:

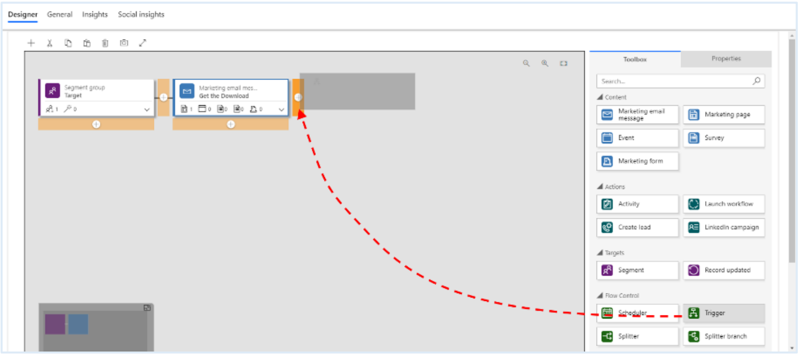
- **Marketing Page**: Select the marketing page you made in the exercise above
- **Tile name**: Type a value that you will recognize later (such as "Free download registration page").



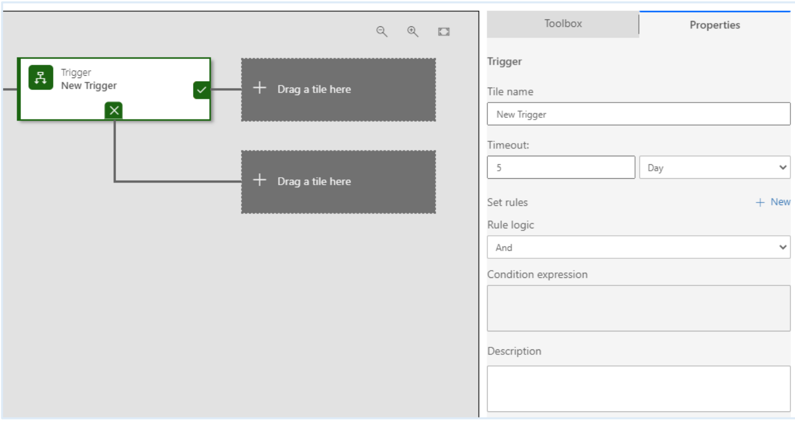
Exercise: Add a trigger tile

Trigger tiles add interactivity to the journey by splitting the pipeline and establishing logical criteria for deciding which path each contact will take.

Drag a **Trigger** tile from the **Toolbox** to the space immediately to the right of the **Marketing email message** tile.

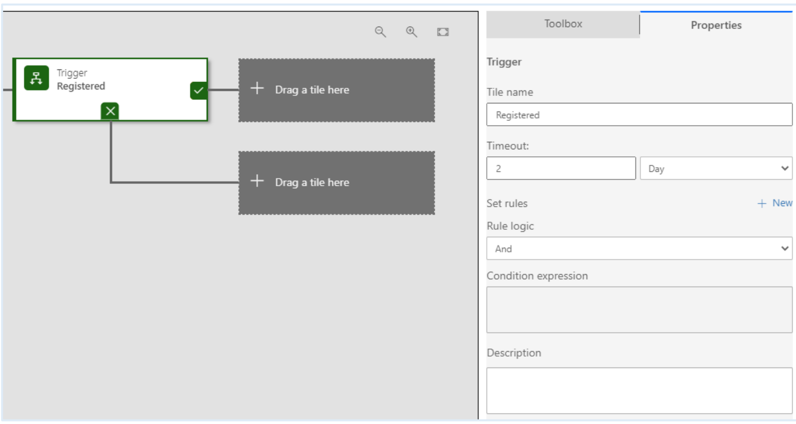


Select the new **Trigger** tile on the canvas, and then open the **Properties** pane.

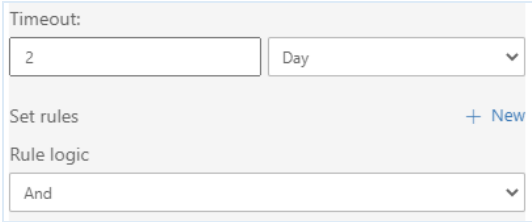


Name: Type a name that you will recognize later (such as "Registered").

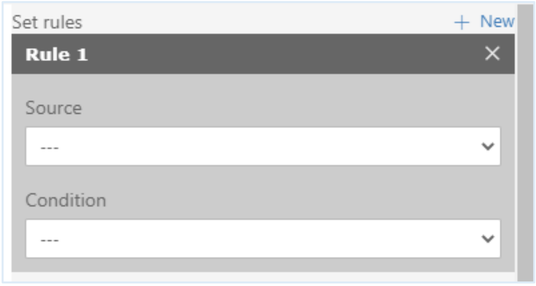
Set the **Timeout** to establish how long contacts will wait on this tile before being sent down the false (bottom) path if they don't submit the registration form.



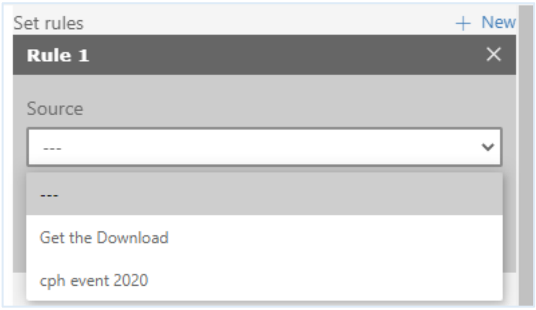
With the **Trigger** tile still selected and the **Properties** pane still open, click the **+New** next to the **Set Rules** heading.



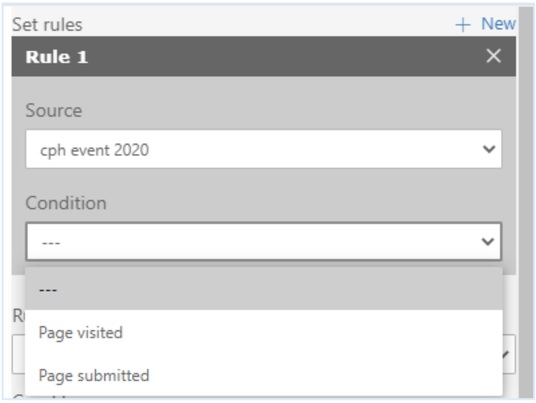
*A new rule, called **Rule 1**, is added for the trigger.*



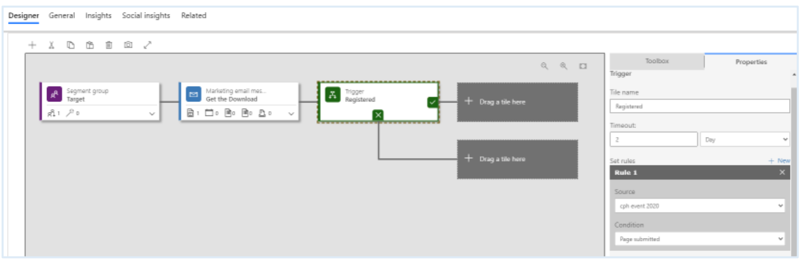
For the **Source** select the marketing page we built in "form "Lab



For the **Condition** select **Page submitted**

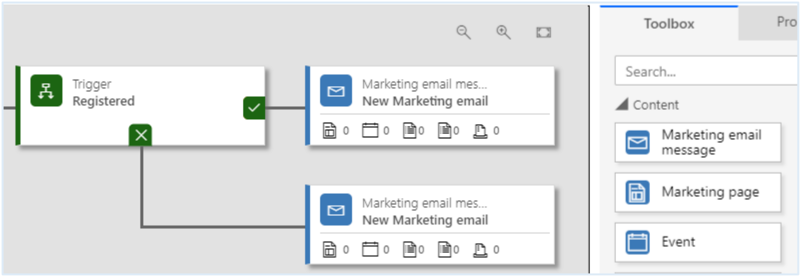


Next up is to add the two mails we built in the "Exercise: Emails with link and follow up message" to the canvas placeholders after the trigger



Exercise: Add two more marketing email tiles

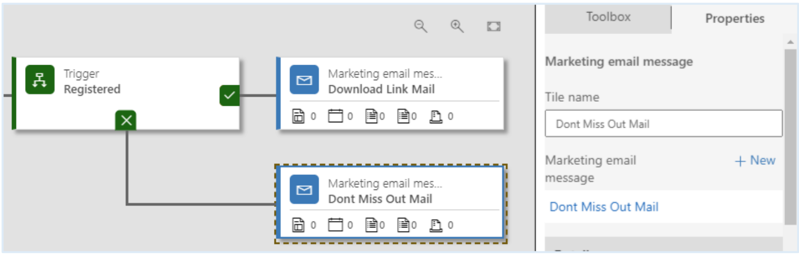
Add two more **Marketing Email Message** tiles after the trigger, one on the top path and one on the bottom path.



Configure them with the mails from the "Exercise: Emails with link and follow up message"

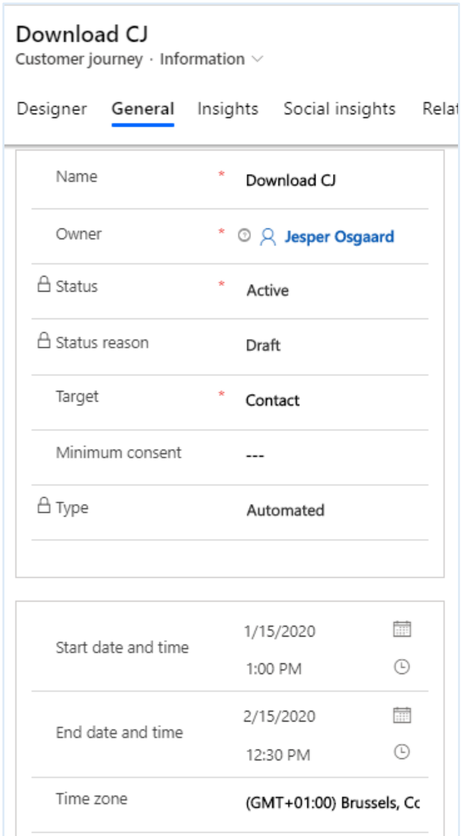
Top tile: This email message is sent to contacts who submit the form (when the trigger evaluates to true). Configure it to send the download-link-mail message

Bottom tile: This email message is sent to contacts who haven't submitted the form within two days of receiving the initial offer. Configure it to send the don't-miss-out email message

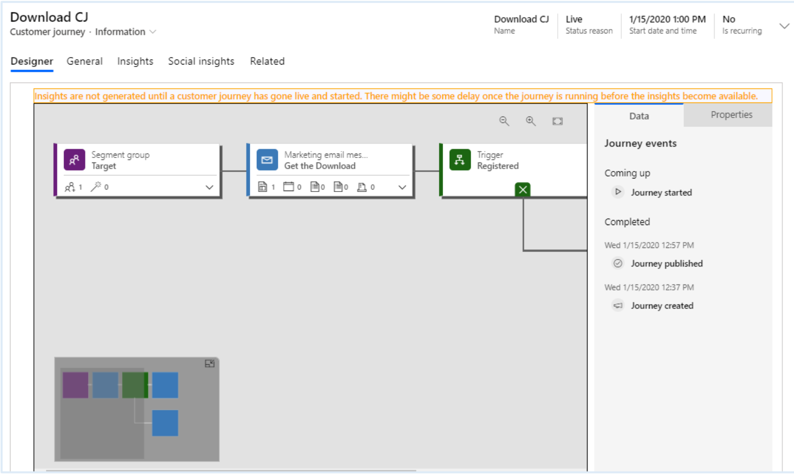


Navigate to the **General** tab and

- **Name** the journey
- Set **Start date and time**
- Set **End date and time**
- Set **Time zone**



Finally, **Check for Errors** and **Go Live**



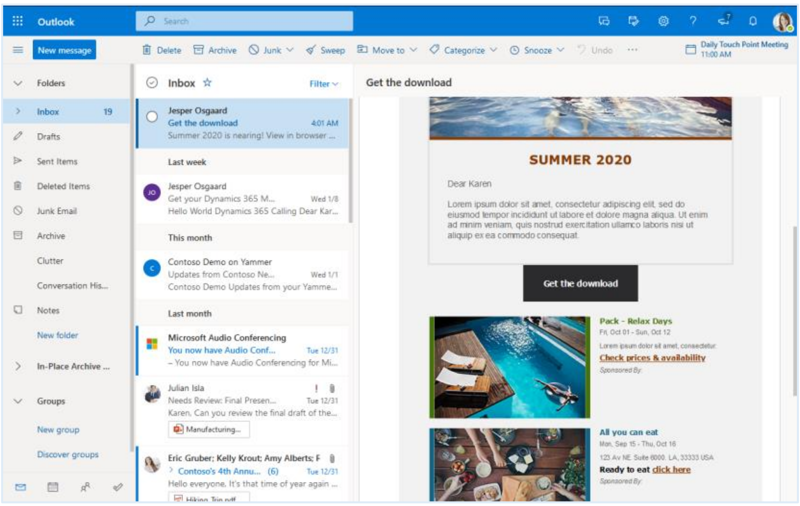
Exercise: Test the customer journey

The customer journeys sends out an email to the recipients. If a recipient opens the mail, clicks the button to open the marketing page, and fills out the form, an second mail is sent to the recipient.

In this exercise we will act as a recipient and go to the above steps.

After the journey starts open the mailbox of one of the recipients (one of the contacts of your segment) and open the mail received

Then click the **Get the download** button to navigate to the download page

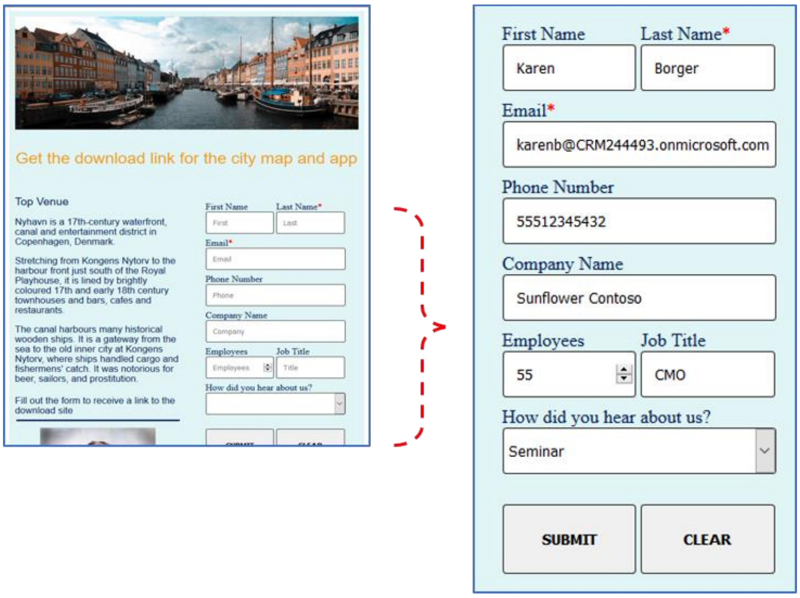


In the download page fill out the form

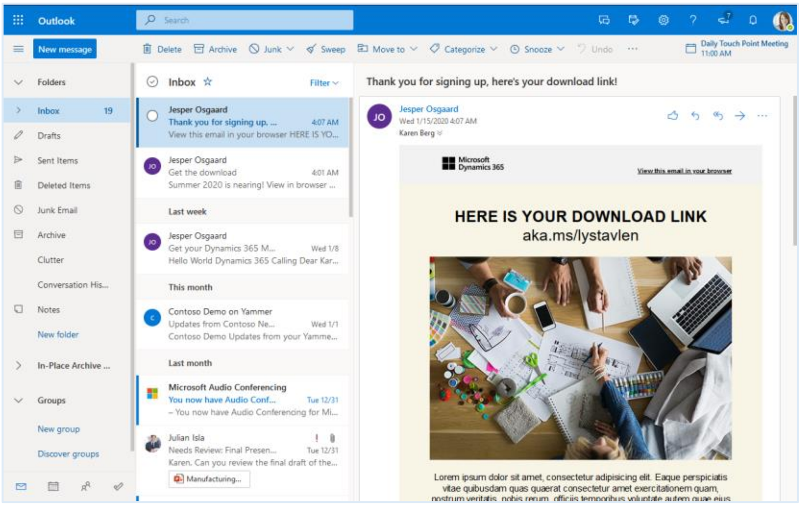
Note: make sure you fill out the required fields (Last Name and Email) with the correct information (that of the recipient)

You could have configured the form to be prefilled with the contacts data

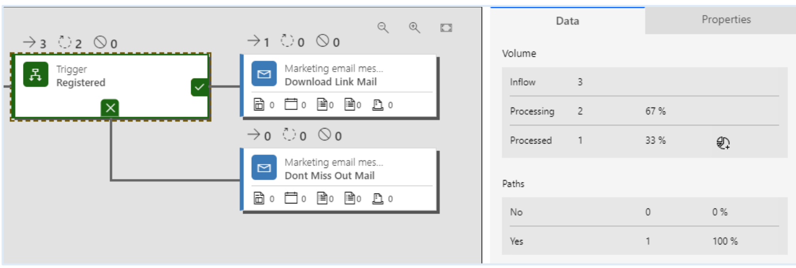
Then click **Submit** to complete the "registration" (the simulated sign up for a download)



Verify in the inbox of the recipient that the second mail (the "Download Link" mail) is received



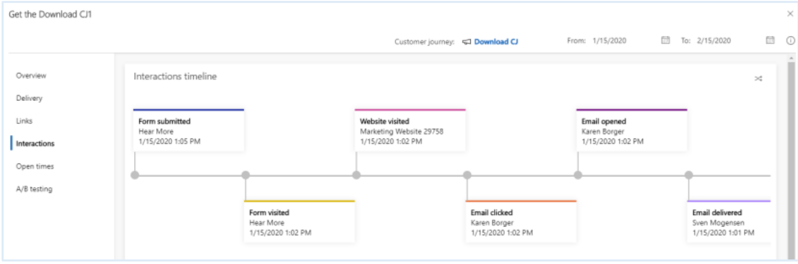
On the Customer Journey notice the statistics for the Trigger tile (one contact sent down the top/yes path so far)



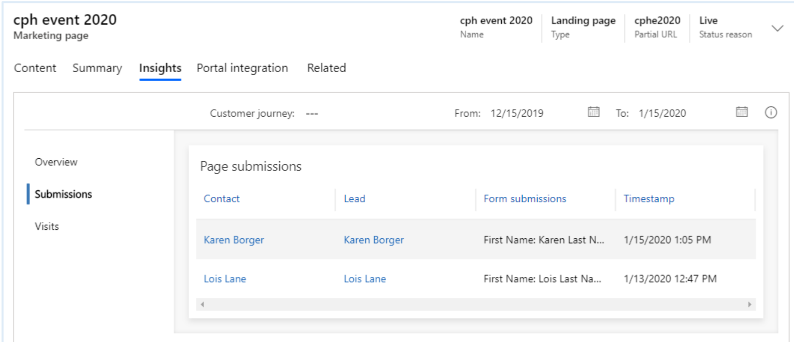
Exercise: Closer look at the insights generated

Running the above customer journey will generate a rich set of insights. In this exercise we will explore just a few of those pieces.

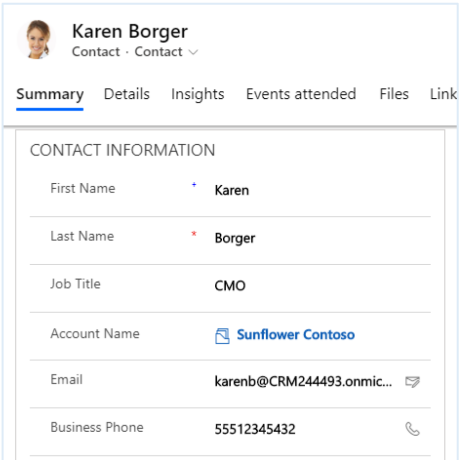
You can click into the insights for the first email to see a timeline of interactions (and more)

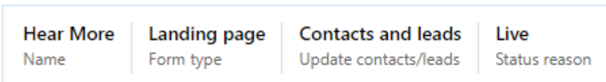


You can click into the insights for the marketing page to see the submissions



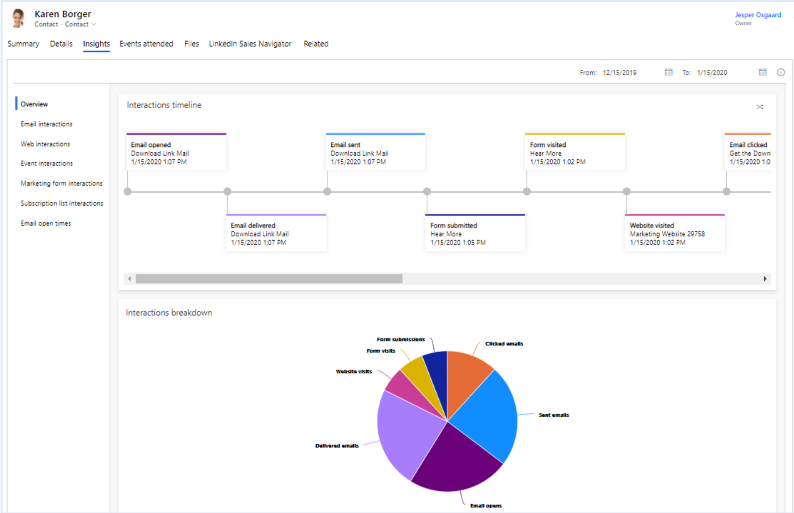
Note also that the Job Title etc. of the contact has been updated as per the setting of the marketing form (Update contacts/leads)

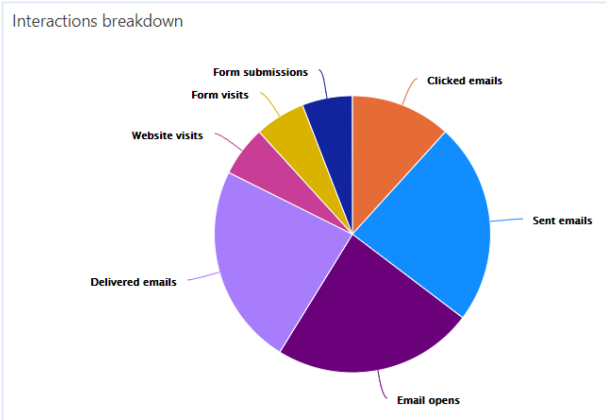




While we are at the contact why not take a look at the **Insights** tab here. On this tab you will find all the insights available for the contact.

Its important to emphasize that this information is available in all the Dynamics 365 CE apps, e.g. Sales and Customer Service. Salespeople and Customer Service Representatives can easily verify if and when a contact received/opened an email etc.





See also	"Flow-control tiles" https://docs.microsoft.com/en-us/dynamics365/marketing/customer-journey-tiles-reference#flow-control-tiles

Lab 6: Automatic lead generation and scoring

One of the common tasks for marketeers is to generate new leads, qualifying them, and then sending sales-ready leads to salespeople.

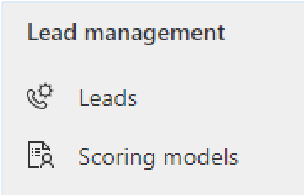
The marketing form we built in “Lab 4: Create a marketing page with a form” is configured to generate and update leads.

To help you identify the hottest leads, Dynamics 365 Marketing can score a lead based on criteria’s you define (e.g. a lead's demographic details and/or interaction records.

A lead who meets your target demographic profile and has interacted with your marketing materials (for example, by opening emails, registering for downloads, browsing your website, or attending an event) will probably get a high score, provided you've set up your scoring model correctly.

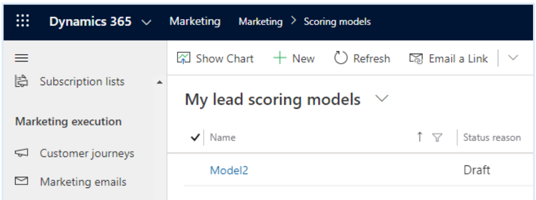
Exercise: Create a lead scoring model

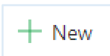
Go to **Lead Management** > **Scoring models** to open the list **My Lead Scoring Models**

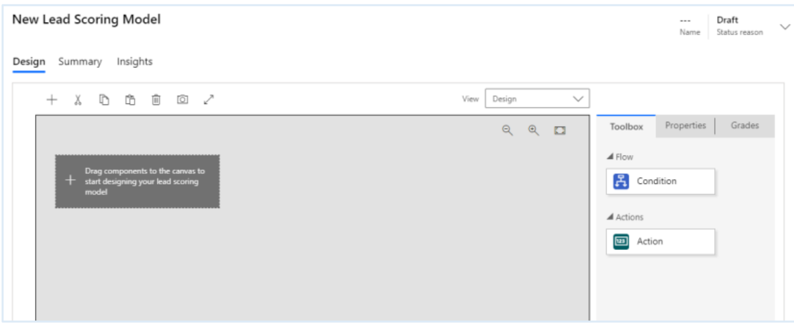


On the command bar, select **New** to open the **New Lead Scoring Model** page, with the **Design** tab selected

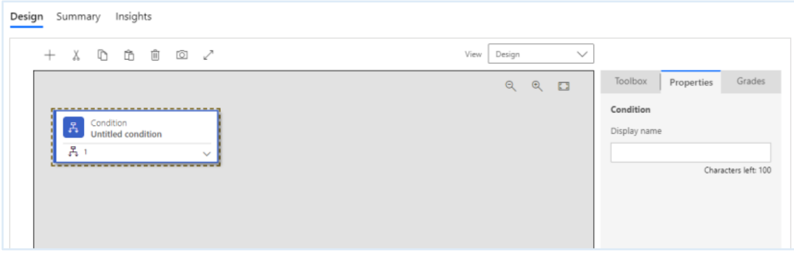
*This designer is like other designers in Dynamics 365 Marketing. You use it to build scoring models by creating a collection of condition/action tile pairs, where the **Condition** tile establishes a condition (such as **email opened**) and the **Action** tile establishes how the score should change when the condition is met (such as, **add 50 points**).*







Drag a **Condition** tile from the **Toolbox** pane to the first position on the canvas

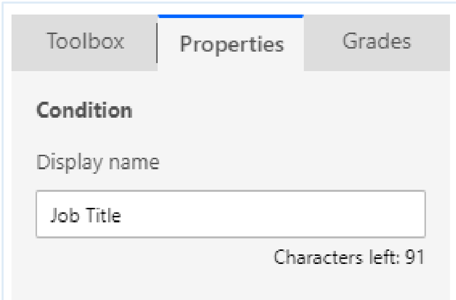


When you drop the tile, it stays selected and the ***Properties*** *pane opens to show its settings.*

In this case, the only setting is the display name for the tile.

We're going to create a condition that looks at the job title of the lead, so

Type "Job Title" for the **Display Name**

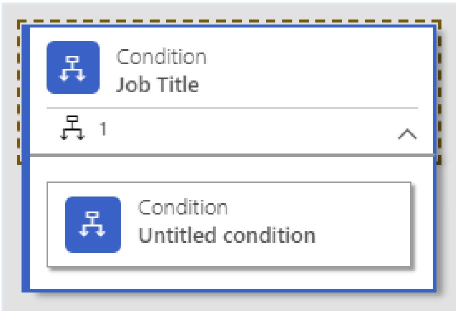


Expand the new **Condition** tile by choosing the expansion button in its lower-right corner.

Here you can see that your new ***Condition*** *tile already has a child* ***Condition*** *tile.*

The parent ***Condition*** *tile simply establishes a name for the stack, whereas the child establishes a logical condition.*

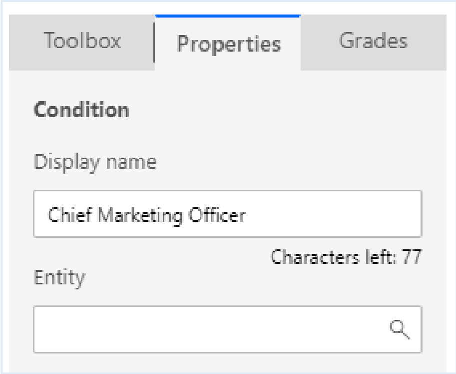
If the child condition resolves to true, the lead score will be updated as specified in the ***Action*** *tile that follows (you'll add that in a few minutes).*



Select the child **Condition** tile, open the **Properties** tab, and then enter a **Display Name** for the tile.

You're going to increase the score for leads from with a job title of CMO, so

Set **Display Name** to “Chief Marketing Officer”.

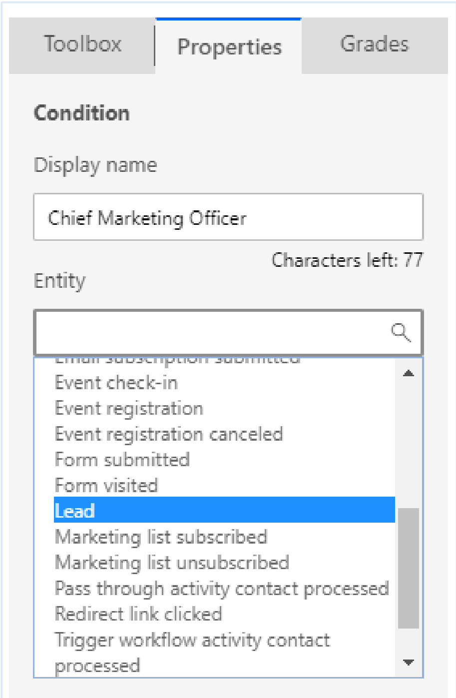


Tip	You can add more child conditions by dragging more **Condition** tiles onto the same parent. If you do this, all child conditions are combined with an AND operator, which means that all of them must evaluate to true for the following Action to be applied.

Click (place cursor) in the **Entity** field to see a drop-down of scorable entities

Dynamics 365 Marketing fetches a list of scorable entities (which can take a few seconds) and displays them as a drop-down list.

The list includes all relevant entities and actions that can be related to a lead record, plus the lead entity itself.



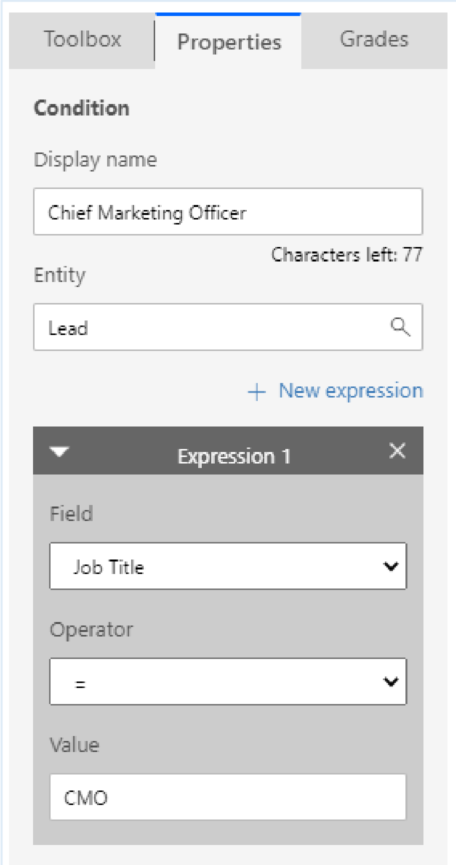
You're looking for the job title of the lead, which is recorded on the lead itself, so

Choose the **Lead** entity here.

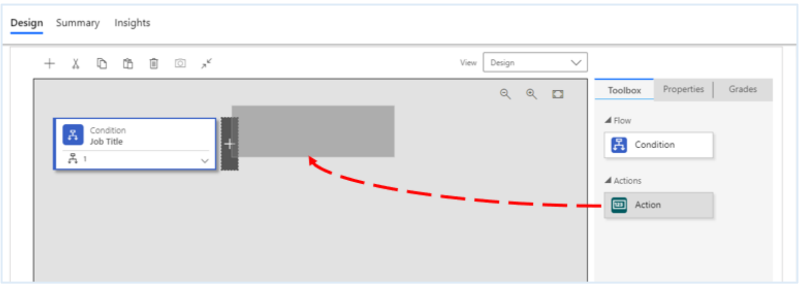
*After you've chosen an **Entity**, an **Expression** box is added that provides choices appropriate for that entity.*

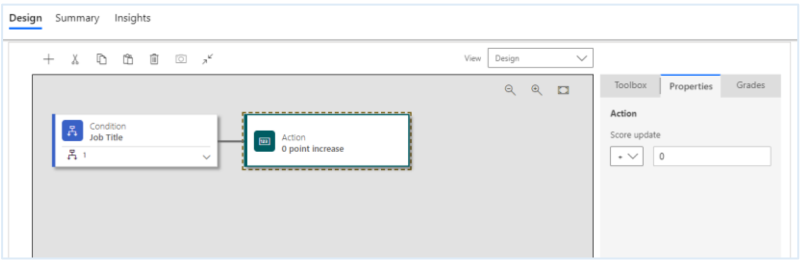
Use the **Field**, **Operator**, and **Value** fields here to establish an expression that evaluates to true where **Job Title = CMO**

- **Field** = “Job Title”
- **Operator** = “=”
- **Value** = “CMO”



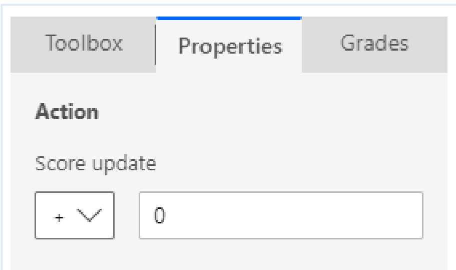
Drag an **Action** tile from the **Toolbox** pane onto the canvas to the space immediately to the right of the **Condition** tile you just set up.





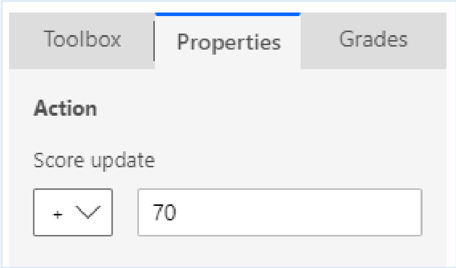
*When you drop the **Action** tile, it stays selected and the **Properties** tab opens to show its settings.*

This is where you set how a lead's score is changed when the **Condition** resolves to true (if the Lead has city = Copenhagen)

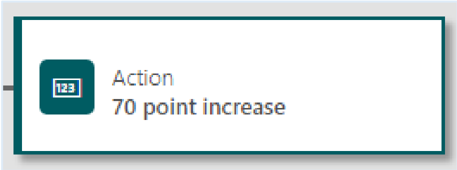


Set **Score Update** to **+70**.

The rule will now give 70 points to any lead with city = Copenhagen.

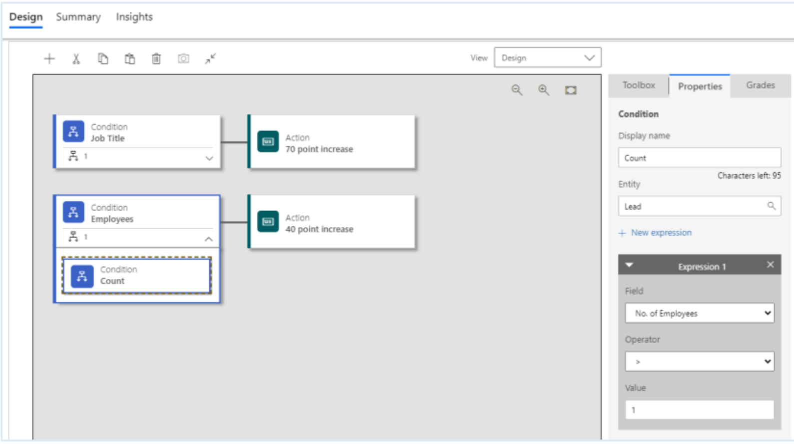


Notice the tile updates



Repeat the process to

- Add a new rule below the first one
- Set it to give +40 points to leads with more than one employee



Tip

When a model includes several rules, like this one does, each rule can affect the lead score independently.

For example, the model you built so far will increase a lead score by 110 points for leads who told us they have a job title of CMO and are more than one employee.

Likewise, leads with a job title of

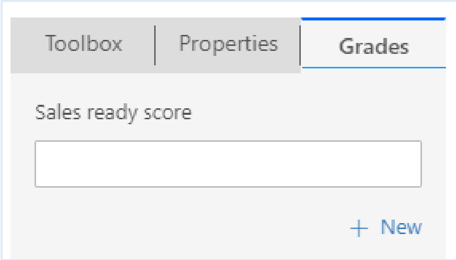
- CIO and more than one employee will get +40 points
- CMO and exactly one employee will get +70 points.

Exercise: Set Sales Ready Score

You can use **Grades** to establish a schedule of grades associated with each of several score ranges, but the most important setting here is the **Sales Ready Score**.

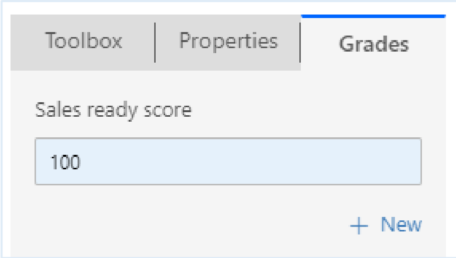
When a lead reaches this score, the system will consider it sales-ready (marketing-qualified) and therefore ready to be forwarded to a salesperson for further attention.

Open the **Grades** tab in the rightmost column



Let's suppose that any lead located in Copenhagen, Denmark is sales-ready, so set this to 100.

Set the **Sales Ready Score** = 100



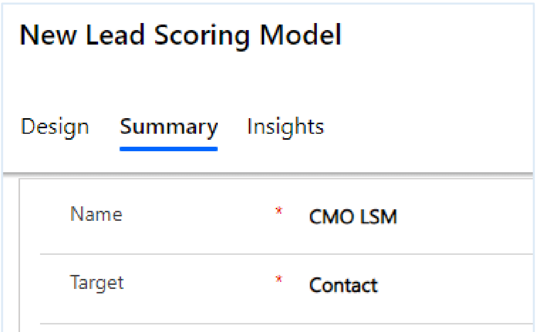
Tip	You can add any number of additional grades to help classify a lead according to its score (such as 0-25=Cold, 26-60=Warm, 61-100=Hot). Choose + New on the Grades tab to add and define each required grade.

Exercise: Go Live with Scoring Rule

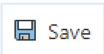
Like customer journeys, marketing pages, and email messages, your lead scoring rule must go live before it can have any effect.

Do the following to finish the model:

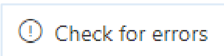
Go to the **Summary** tab and give your rule a **Name** (such as "CMO LSM")

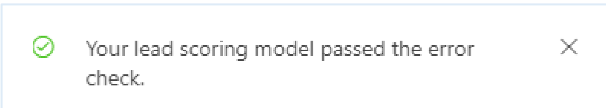


On the command bar, click **Save** to save your model.



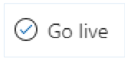
On the command bar, select **Check for Errors**, and then read the results and fix any problems reported.

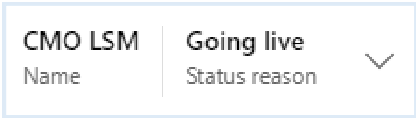




On the command bar, select **Go Live** to activate the model.

*Dynamics 365 runs a final error check, and then updates the **Status Reason** to **Going Live** and subsequently to **Live**.*





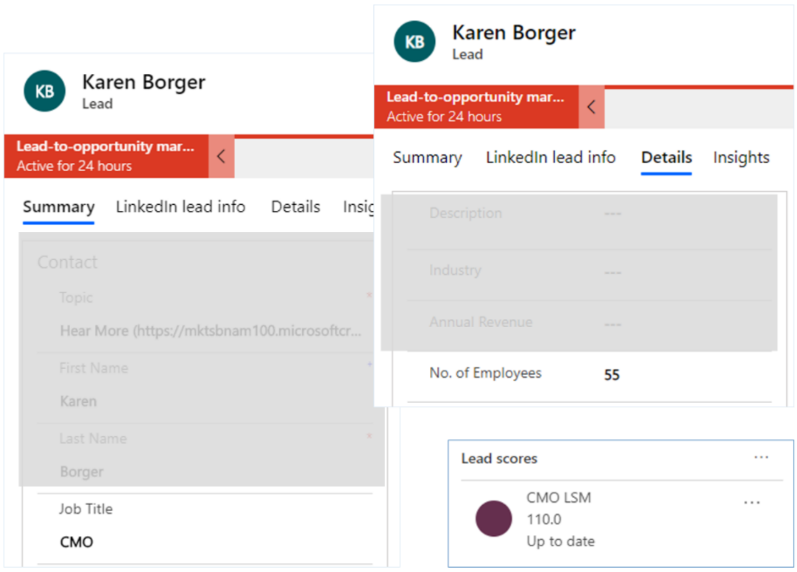
Exercise: Test the Lead Scoring Model

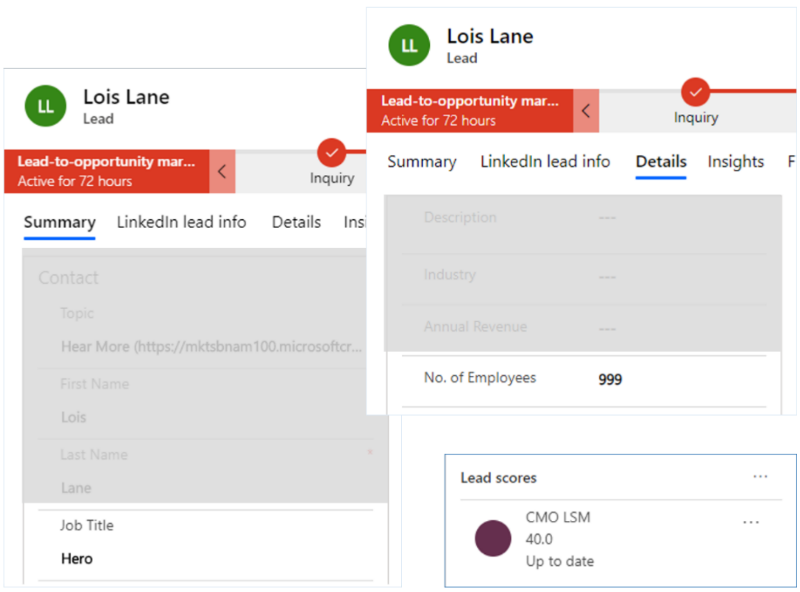
To test the lead scoring model, including the Sales Ready Score, we can look at some of the existing leads, as well as create new leads.

If you now navigate to one or more of the leads generated in the above exercises you will notice that the leads are scored with the new model

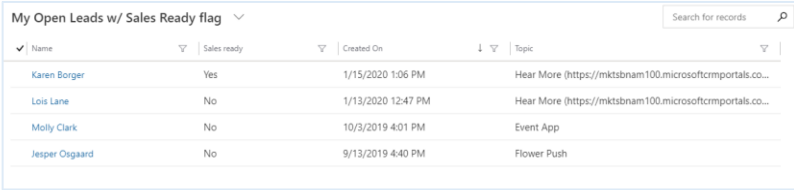
Look for the **Lead Scores** section near the lower-right corner of the page (you might need to scroll).

Each lead scoring model is listed here, including your new one.





You can add the Sales Ready field to a view to verify its set as expected



See also	"Design lead-scoring models" https://docs.microsoft.com/en-us/dynamics365/marketing/score-manage-leads

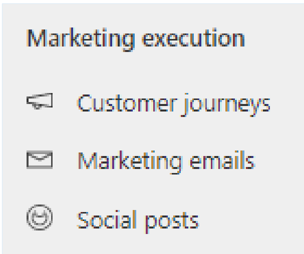
Lab 7: Social Posting

Dynamics 365 Marketing can schedule and post messages directly to your organization's accounts on social media sites. Use the Social posts settings to author and schedule your posts.

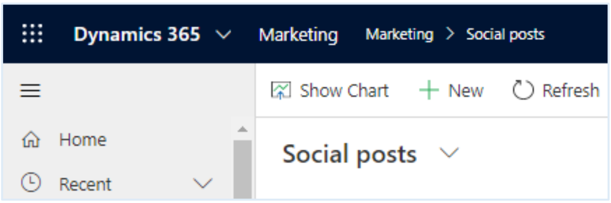
Important	Before you can start publishing messages, your administrator must configure and authenticate each social-media account that you will publish to. Configure your social media accounts: https://docs.microsoft.com/en-us/dynamics365/marketing/mkt-settings-social-media

Exercise: Author a social post

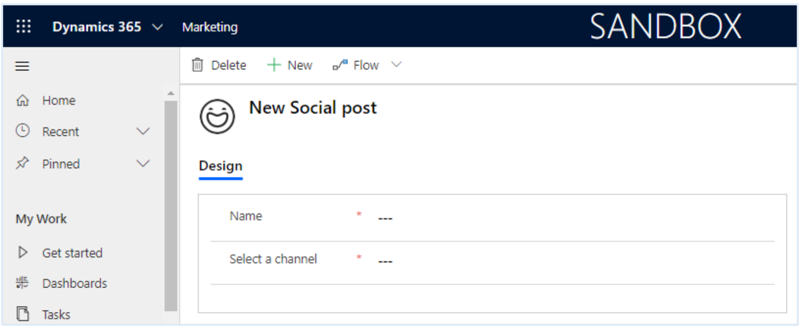
In the sitemap navigate to **Marketing execution** > **Social posts** to open the **Social posts** grid



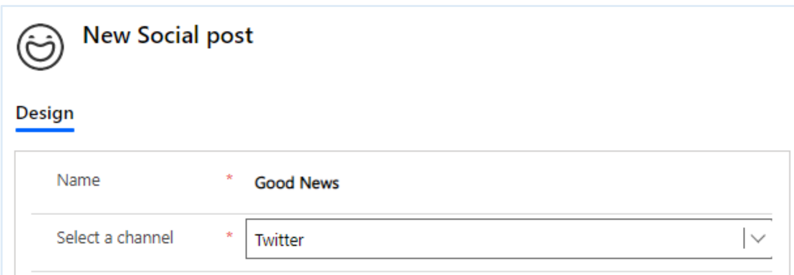
In the Social posts grid click **New** to open the **New Social post** form



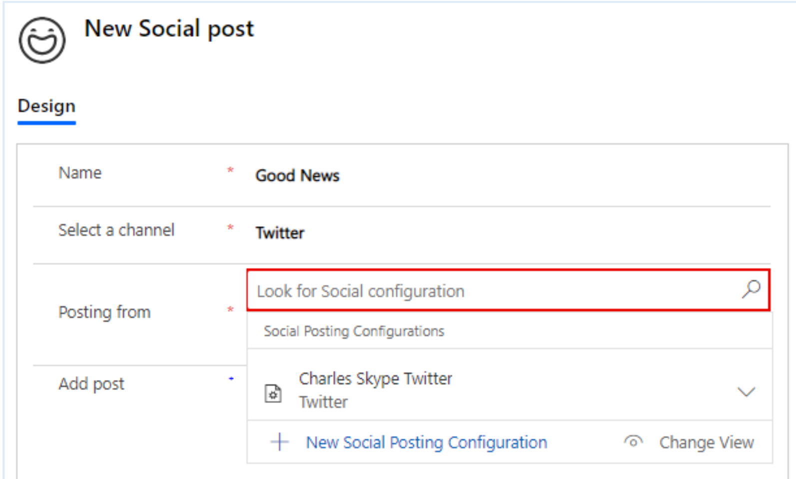
In the **New Social post** form



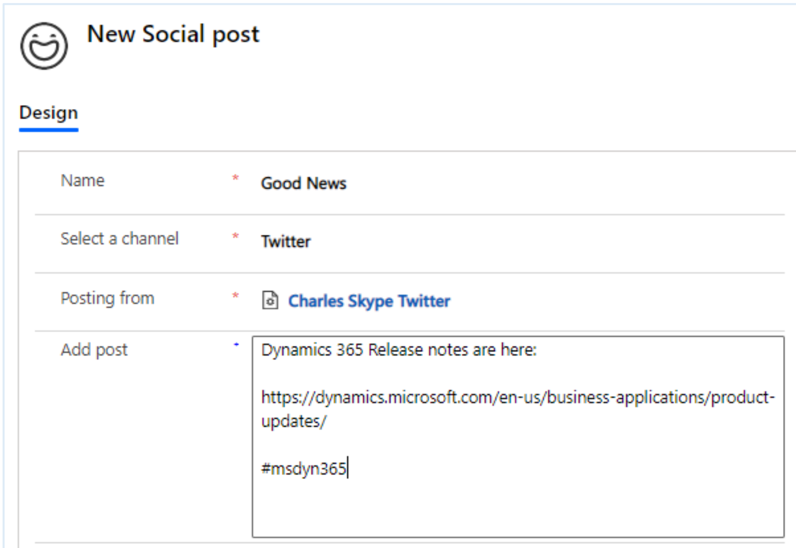
Type a **Name** and **Select a channel**, e.g. Twitter



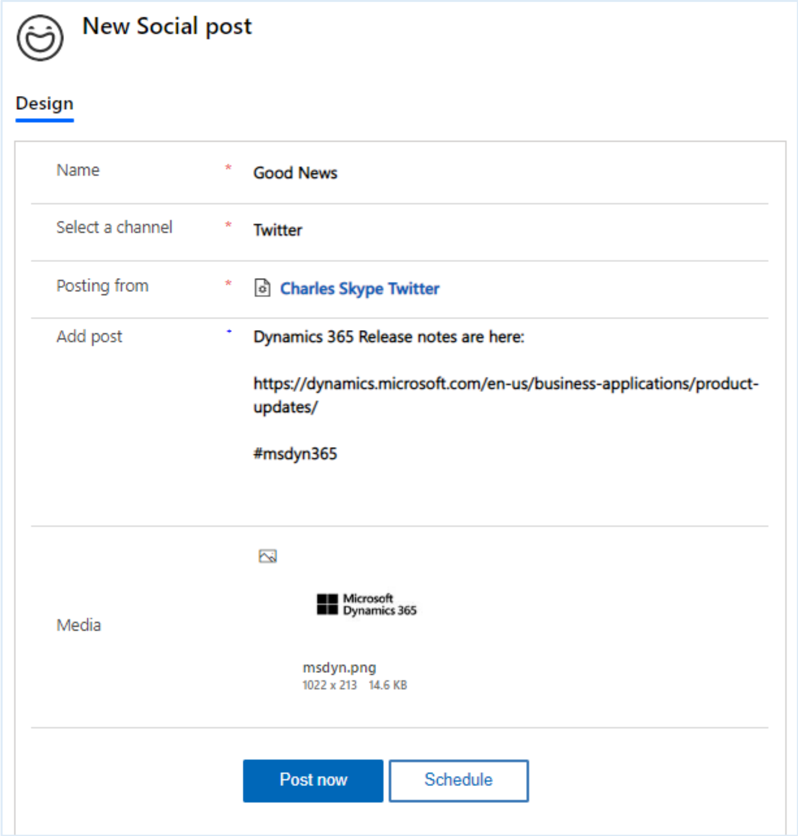
Select an already configured Social configuration (a username and credentials added via Settings) in the **Posting from** drop-down



Compose the message body text in the **Add post** text box



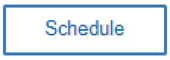
Add an image if applicable in the **Media** section



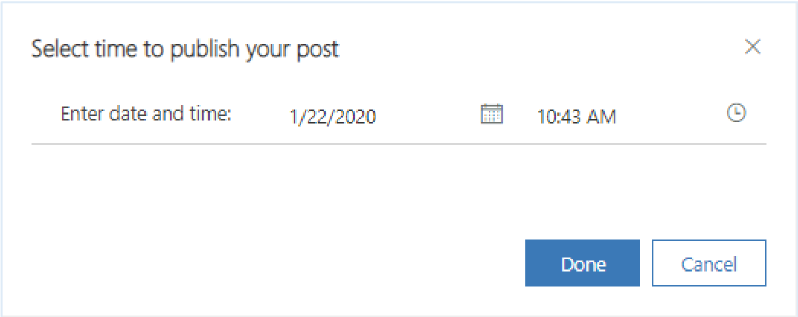
If the post should be posted now just click the **Post now** button (optional: don't click Post now, and continue to the next exercise and configure a schedule for the post)

Exercise: Schedule a social post

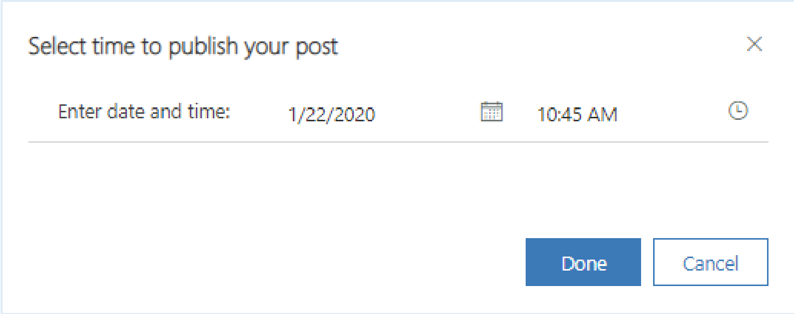
Continuing the above exercise, click Schedule to display the **Select time to publish your post** dialog



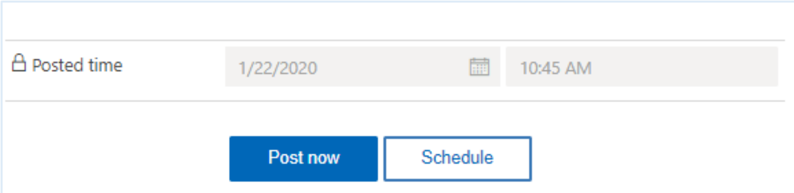
In the the **Select time to publish your post** dialog

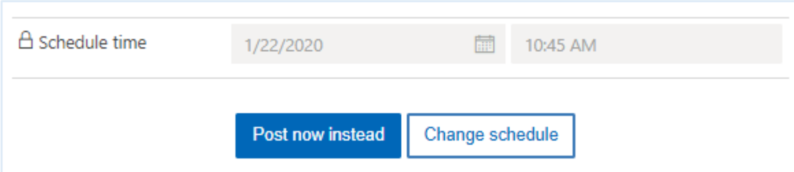


Select a date and time, and then click **Done**

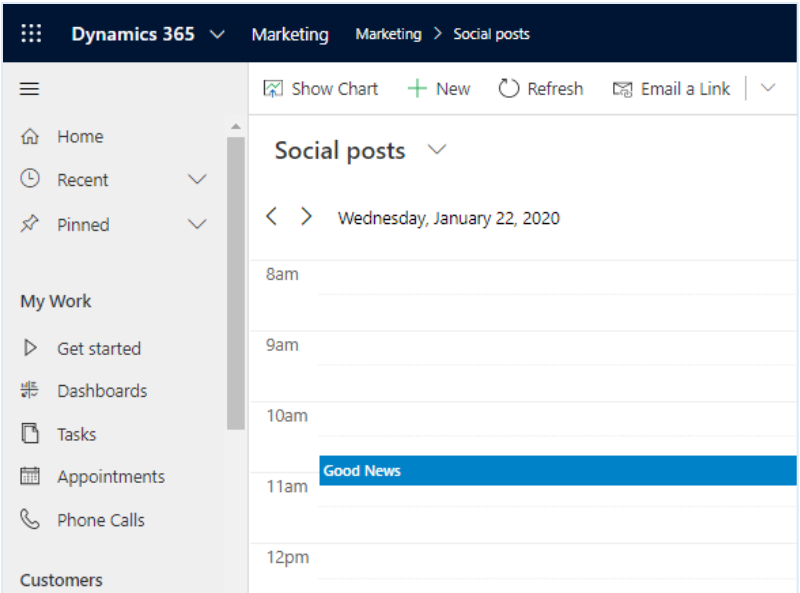


The header changes from **Posted time** to **Schedule time**

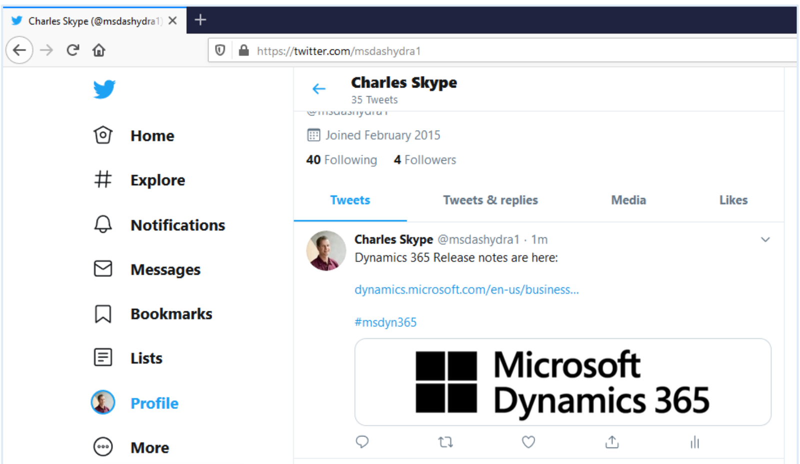




In the calendar view verify the scheduled post, and get an overview of what other posts are scheduled (if any)



When the scheduled time arrives check the selected social account and verify the posting



See also	“Schedule and post messages on social media” https://docs.microsoft.com/en-us/dynamics365/marketing/social-posting

Lab 8: Event Management

Many organizations organize events (e.g. seminars, trade shows, conferences and more) to engage with external and internal audiences.

The planning and successful execution of an event can be a fairly intricate and varied process, with a lot of details to be coordinated across various tasks. This can include creating event passes & registration, sessions, speakers, venues, sponsorships, and so on. Dynamics 365 Marketing can help you with all that and more.

See also	"Event planning and management" https://docs.microsoft.com/en-us/dynamics365/marketing/event-management

Setting up a simple seminar

In this chapter we will set up a simple seminar with two sessions (a Roadmap session and a GDPR session), taking place in our company premises.

Our company premises (building) has two rooms on the ground floor, Cust101 and Cust102 and for this event we can leverage two speakers. We will assign each session a room and a speaker.

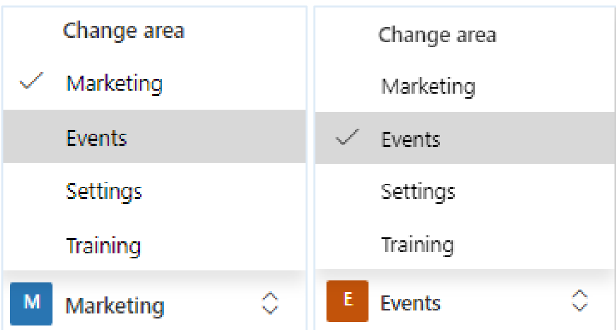
Last but not least we will publish the event to our event portal for our audience to register for the sessions.

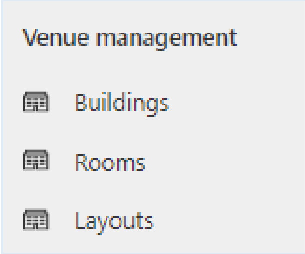
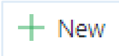
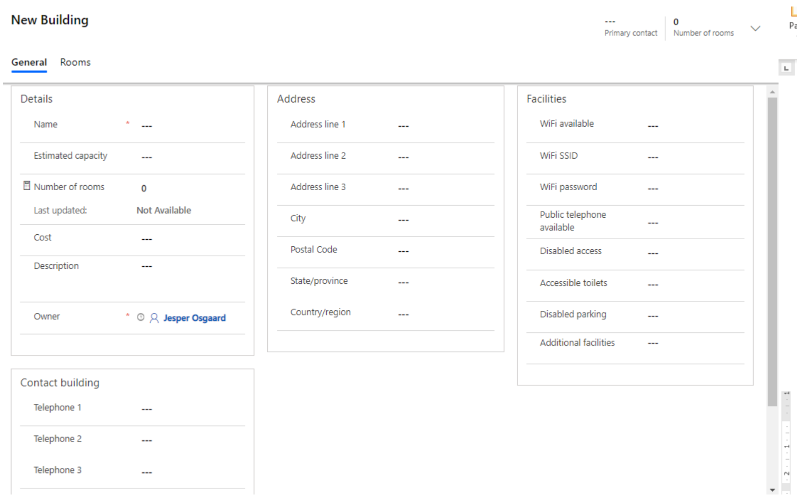
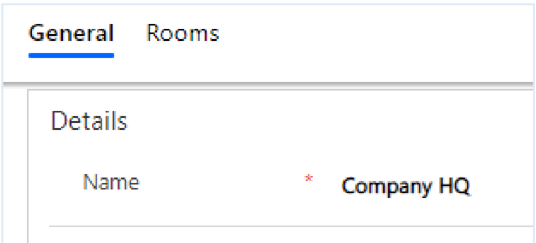
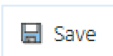
So, the setup steps are

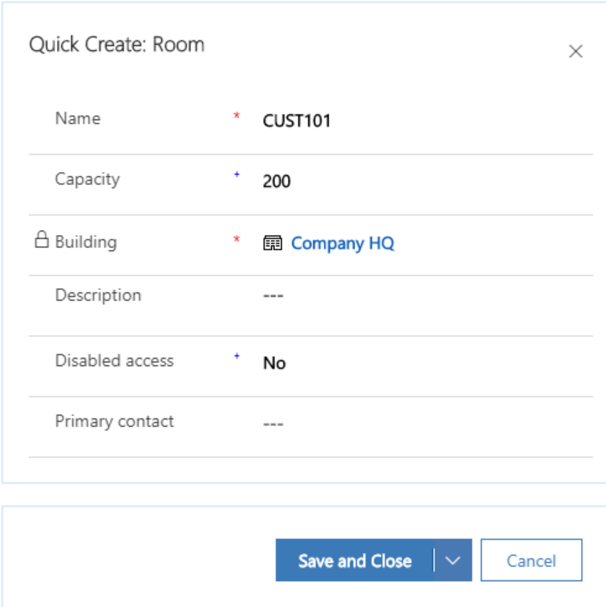
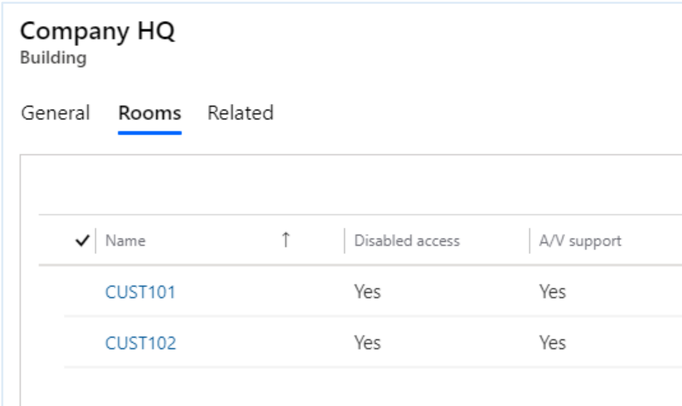
- Create building and rooms
- Create Speakers
- Create Event
- Create Session(s)
- Create Custom Registration Field
- Publish

Exercise: Crete building and rooms

For a physical event we need a venue – a building and room(s)

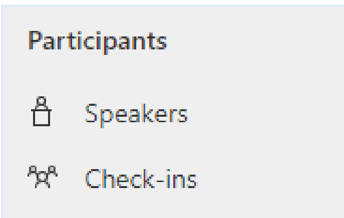
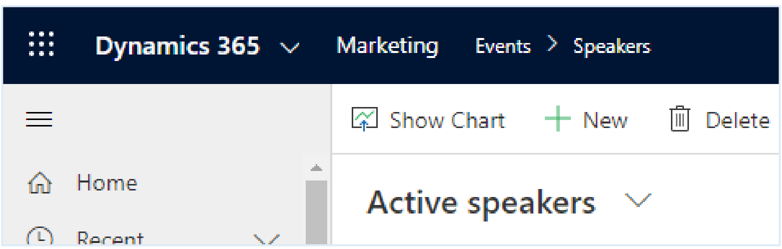
In the module selector in the lower left corner of the sitemap, select **Events** to navigate to the Event module	

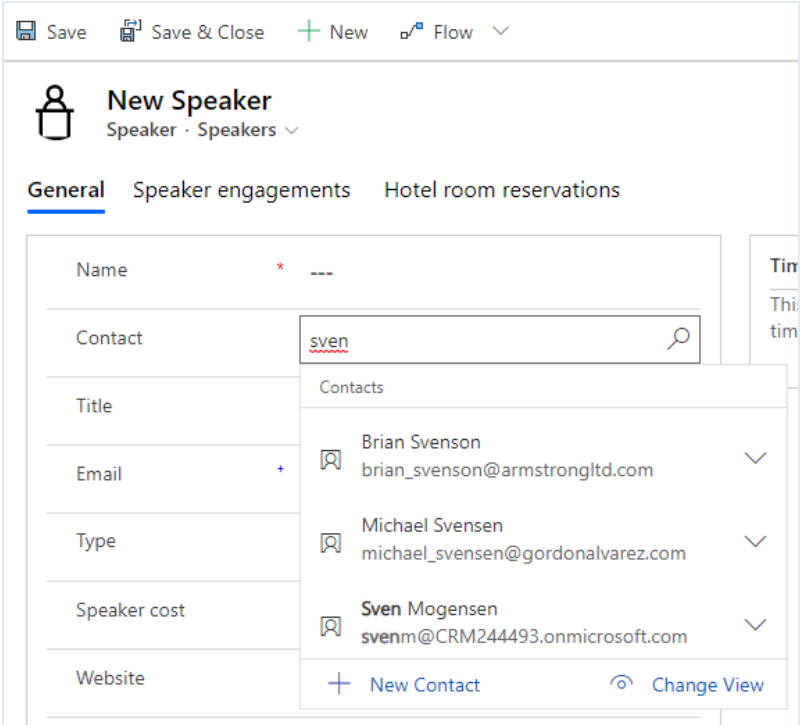
Navigate to **Venue Management** > **Buildings** to open the Active Buildings grid	
In the **Active Buildings** grid click **New** to open the **New Building** form	
In the **New Building** form fill out the required and optional information on the **General** tab	
Name is required. Fill out name and click **Save**	 
Click the **Rooms** tab and then click **New Room** in the sub grid to display the	

Type a name for the room, a capacity (optional). Create another room (using the **Save and New** button) **Save and Close**	
The two rooms now listed with the building	

Exercise: Create Speakers

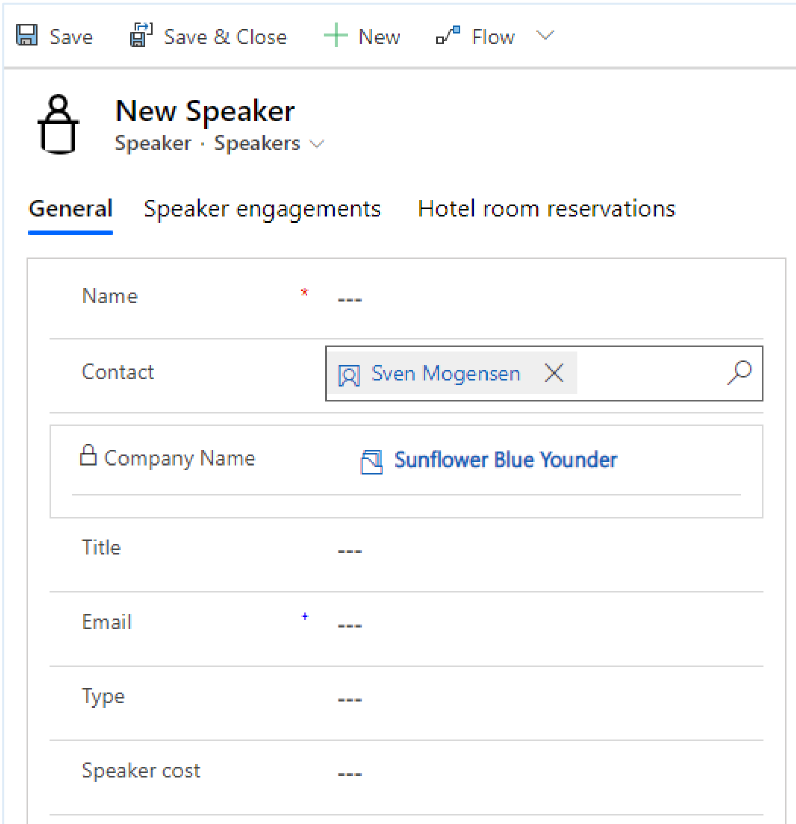
Speakers are related to contacts. In this exercise we will create to speaker records.

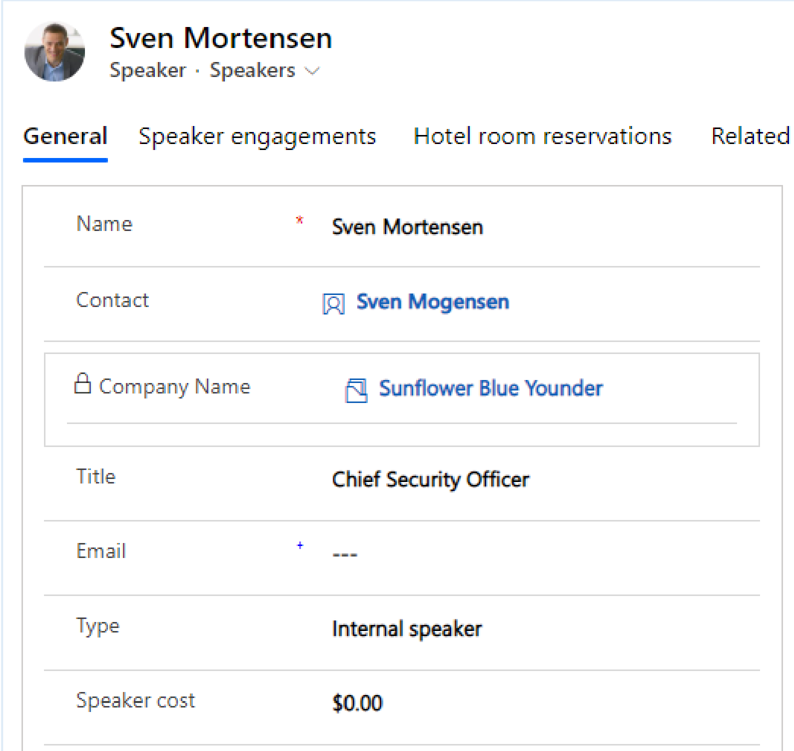
To setup speakers, in the sitemap navigate to **Participants** and click **Speakers** to open the **Active Speakers** grid	
In the **Active Speakers** grid click **New** to open the **New Speaker** form	

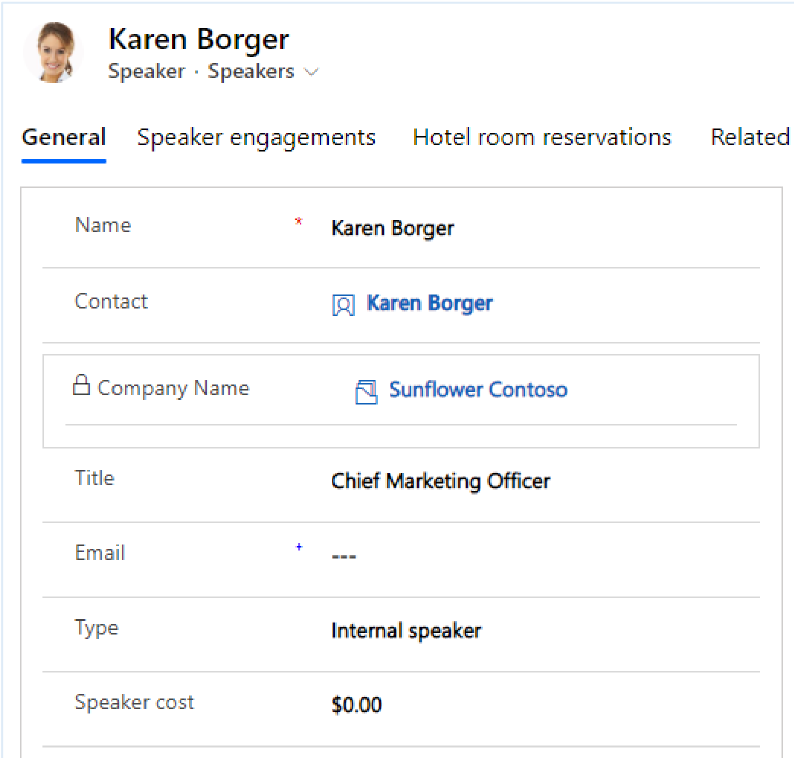
<table>
<tr>
<td></td>
<td>
</td>
</tr>
<tr>
<td>Select an existing contact in the Contact drop-down</td>
<td>
</td>
</tr>
<tr>
<td>The system relates the speaker record to the contact chosen, and the account of the contact chosen.

However, the contact and biographical information in the speaker record is independent from the contact record so

Fill out the appropriate fields on the form – Name is required

Click Save & Close to save and close the contact</td>
<td>
</td>
</tr>
</table>

<table>
<tr>
<td>When we save the contact the contacts picture is used for the speaker record as well</td>
<td>


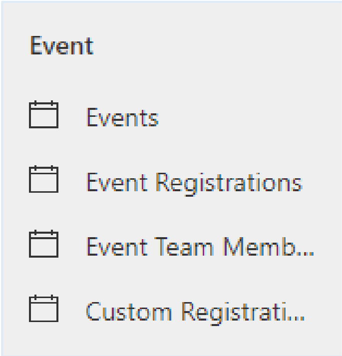
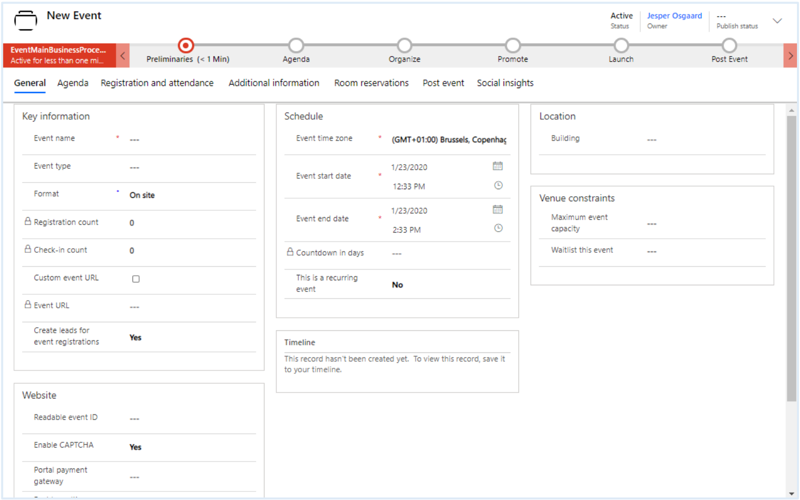
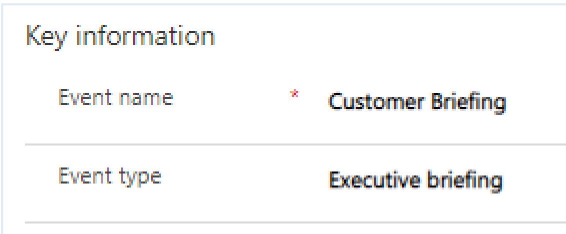
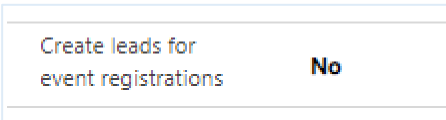
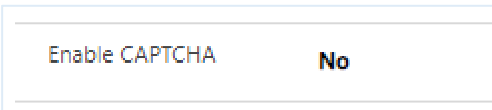
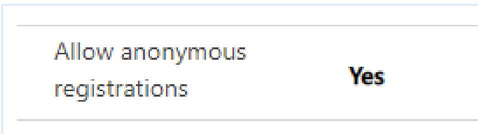
</td>
</tr>
<tr>
<td>Repeat to create one more speaker</td>
<td>


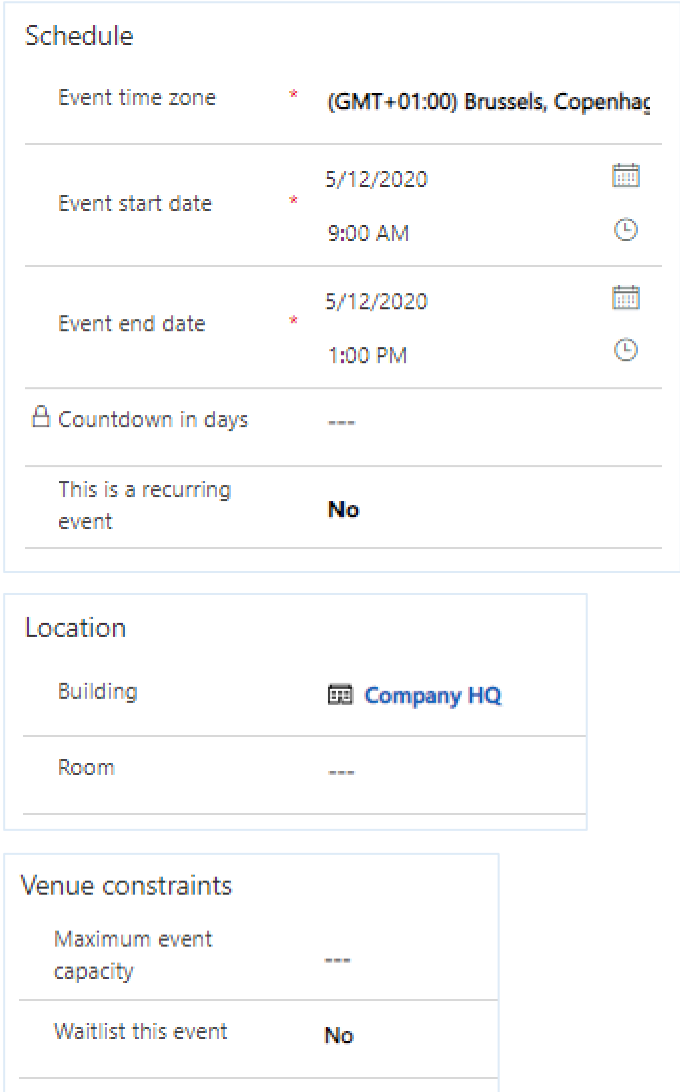
</td>
</tr>
</table>

See also	"Set up and assign session speakers" https://docs.microsoft.com/en-us/dynamics365/marketing/set-up-event#set-up-and-assign-session-speakers

Exercise: Create Event

Having setup the venue and speakers we can now setup the event.

To setup an event navigate to Event and click Events to open the **Active events** grid.	
In the **Active events** grid click **New** to open the **New Event** form	
*The **New event** form lets us define and create all the information for the event, and publish the event to the web* *It even has a well-defined process flow with the stages and steps most commonly followed when setting up an event, helping us cover all the bases.* *We will primarily work with the tabs **General**, **Agenda**, and **Registration and attendance***	
In the **New Event** form on the **General** tab fill out the required and optional information - including the location (do not select a room for the location, only a building) Set **Allow anonymous registrations** to **Yes**	   


Schedule
Event time zone *
(GMT+01:00) Brussels, Copenhag
Event start date *
5/12/2020
9:00 AM
Event end date *
5/12/2020
1:00 PM
Countdown in days

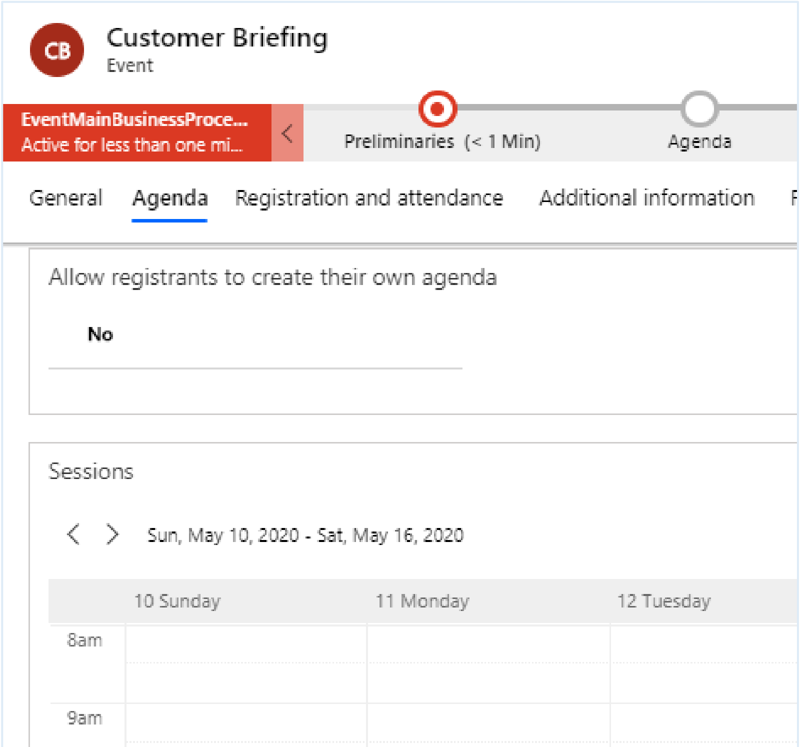
This is a recurring event
No
Location
Building
Company HQ
Room

Venue constraints
Maximum event capacity

Waitlist this event
No

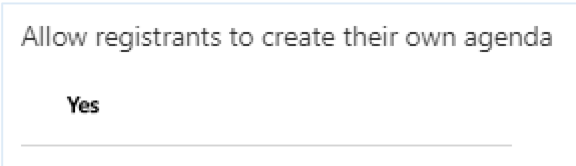
Exercise: Create Sessions

Click Save to **Save** the event and then click the **Agenda** tab

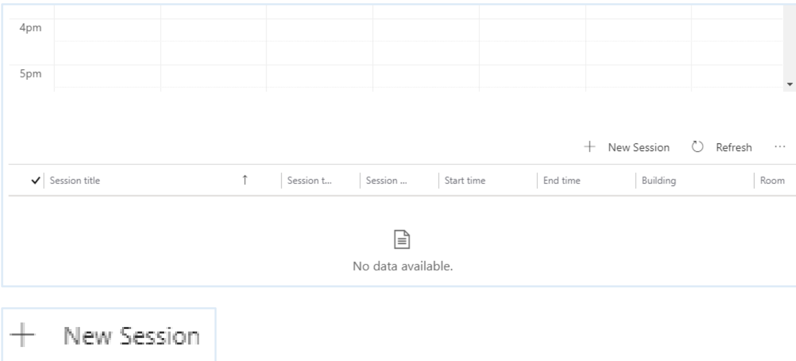


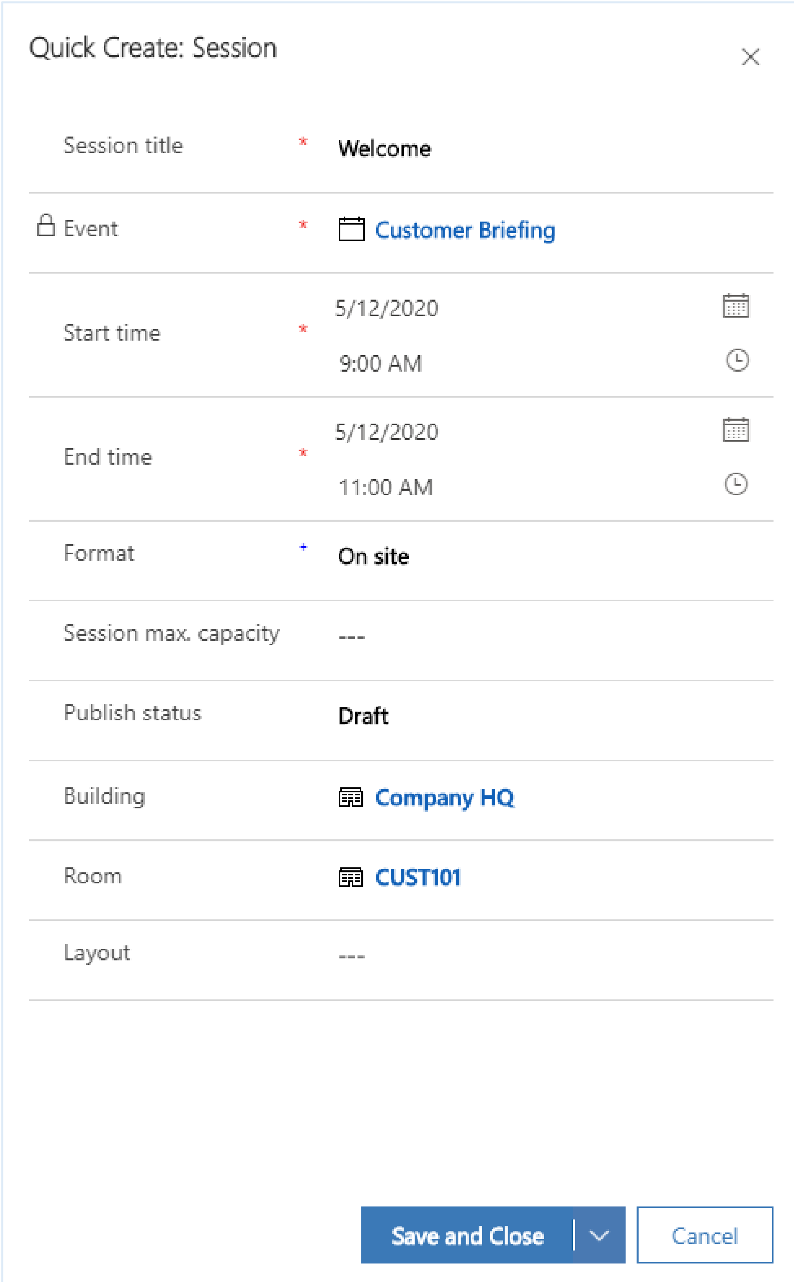
Change the **Allow registrants to create their own agenda** to Yes

This will introduce a session basket on the website and allow the registrants to register for individual sessions



Scroll down to the grid below the calendar and click **New Session** to open the **Quick Create Session** pane



In the **Quick Create Session** pane create the first session of the event E.g. Session title = "Welcome" Start/End time = (date of our event) and (first half of total time of our event) Building = (your building) Room = (one of your rooms)	
Click the drop-down next to **Save and Close** and then click **Save & Create New** to save the current session and create a new session	

In the **Quick Create Session** pane create the second session of the event

E.g.

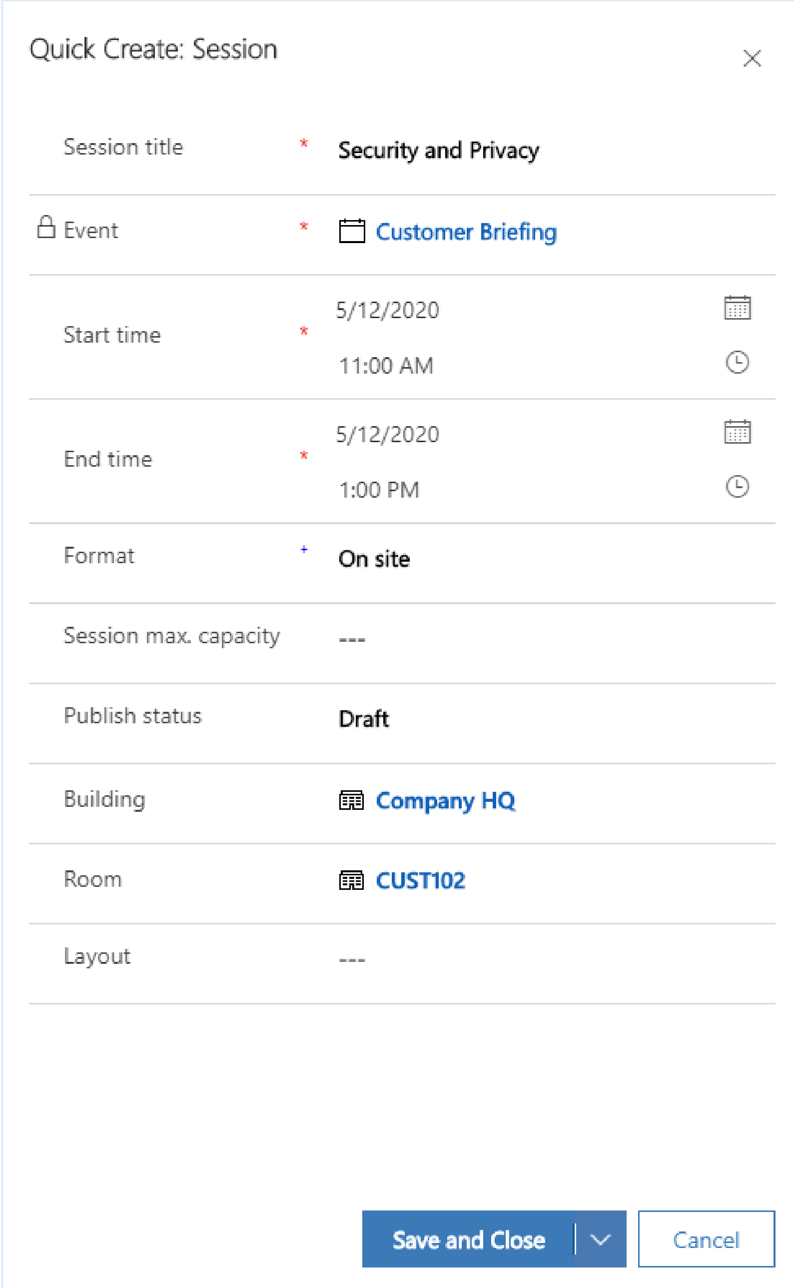
Session title = "Security and Privacy"

Start/End time = Start/End time = (date of our event) and (second half of total time of our event)

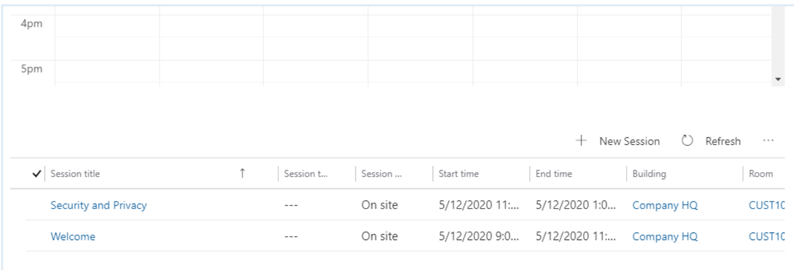
Building = (your building)

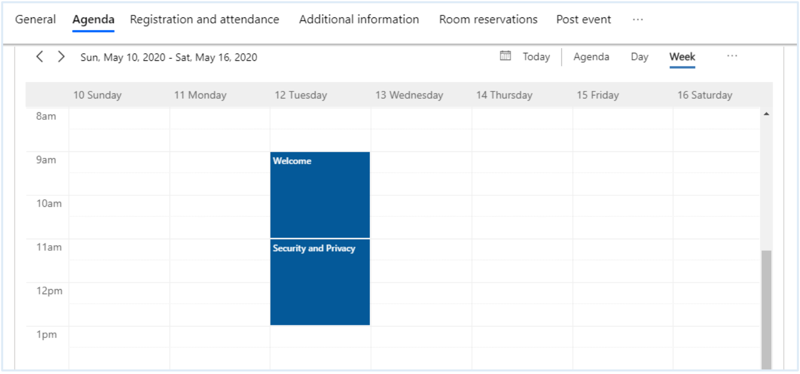
Room = (another of your rooms)

Click **Save and Close** to save and close the session



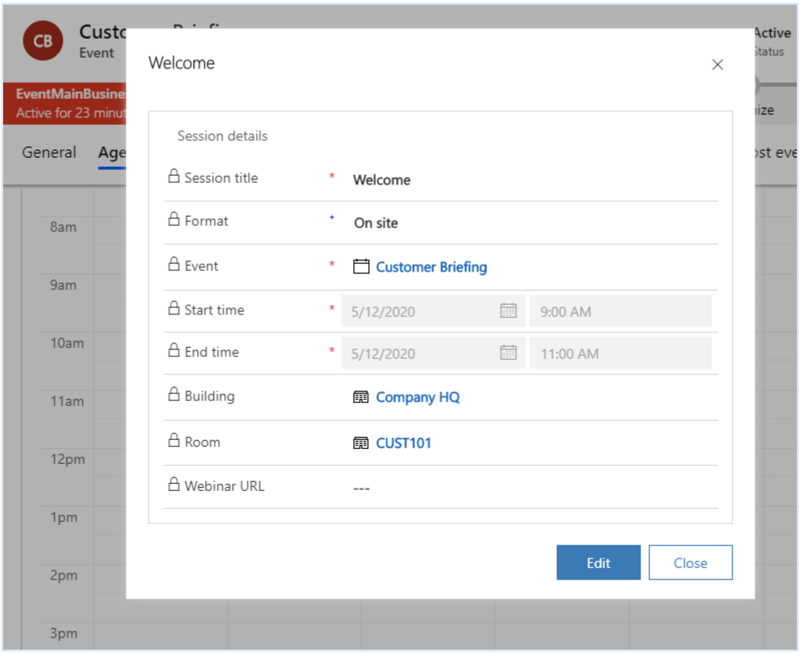
The two sessions we created are displayed in the grid and in the calendar view on the ***Agenda*** *tab*





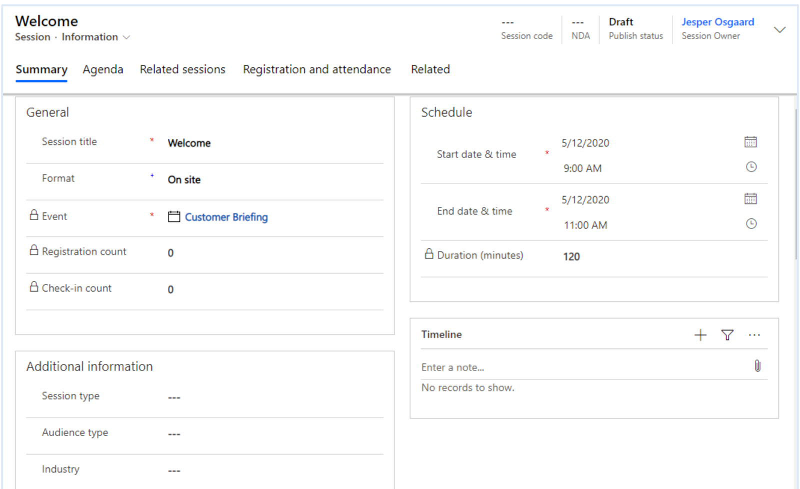
Exercise: Detail sessions and associate speaker

Click the first event in the calendar view to open a details form, and then click **Edit** to open the session form

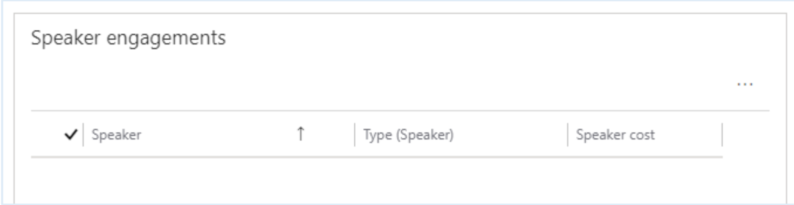


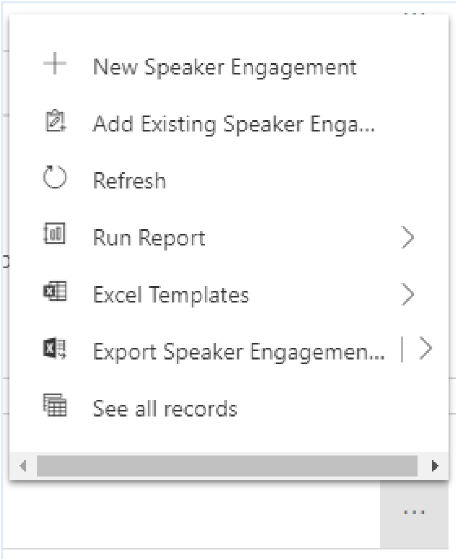
In the session form we can add additional details to the session, including a speaker

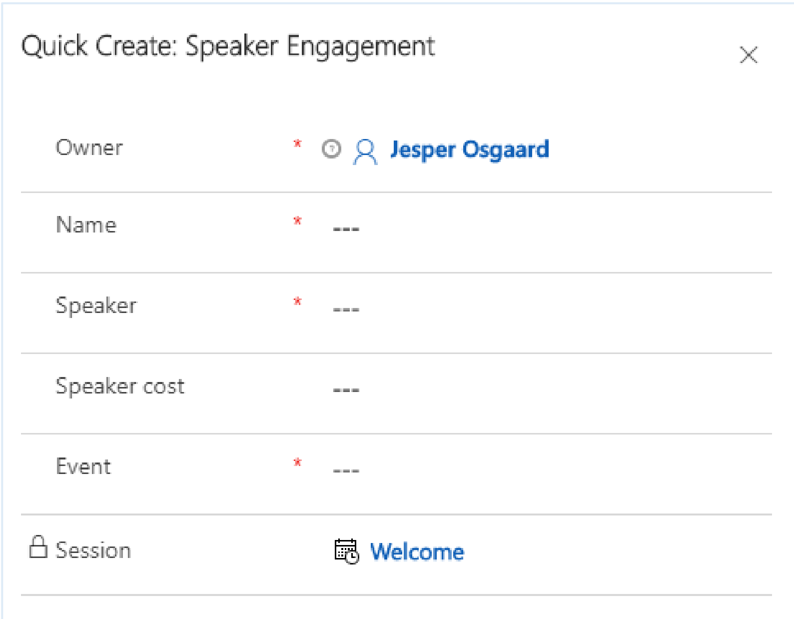
On the session form click the **Agenda** tab

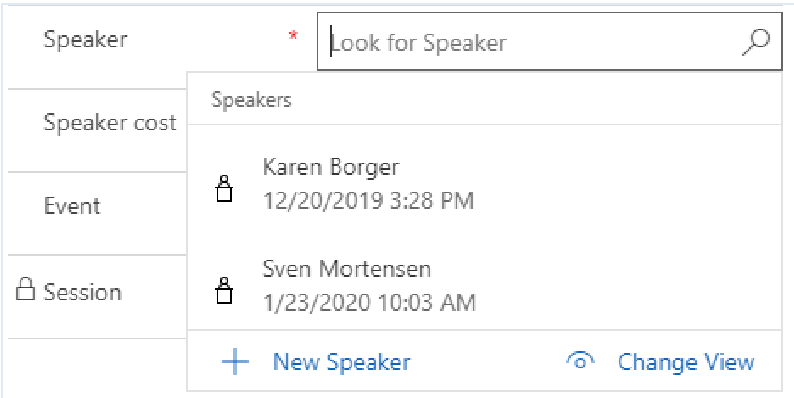


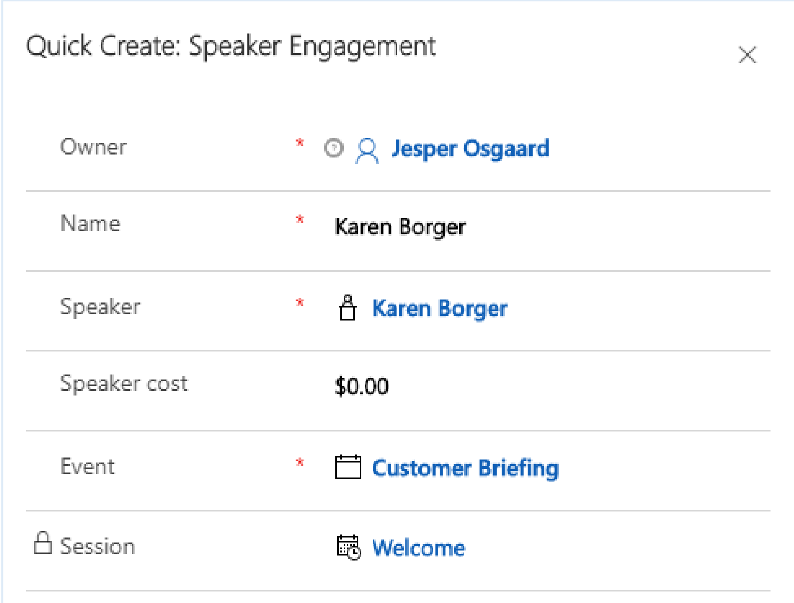
On the **Agenda** tab, in the **Speaker Engagements** section, click the three dots to the right, and then click **New Speaker Engagement** to open the **Quick Create: Speaker Engagement** pane



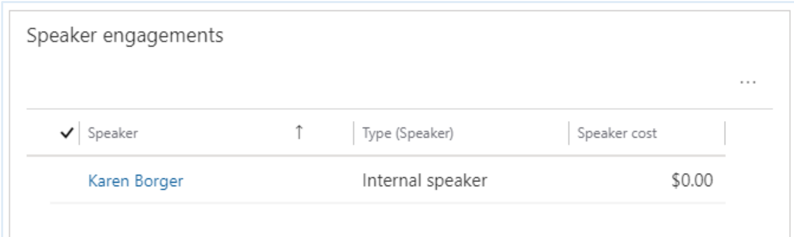


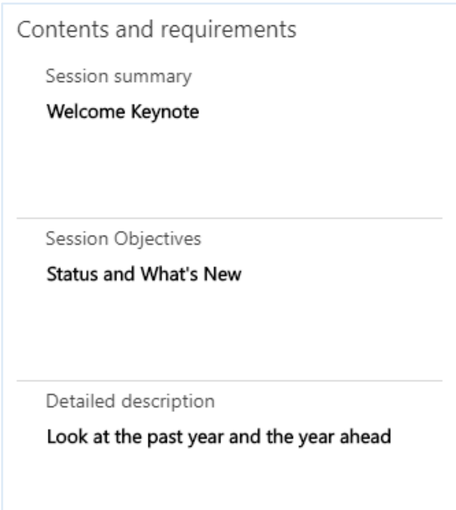


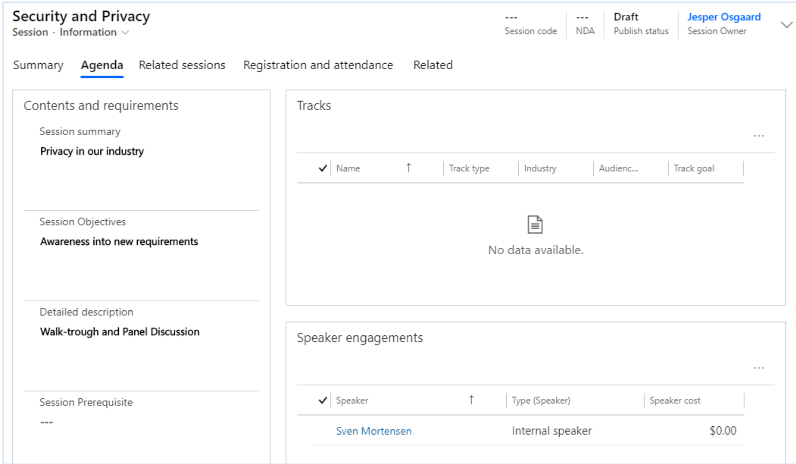



Quick Create: Speaker Engagement
Owner
Jesper Osgaard
Name
Karen Borger
Speaker
Karen Borger
Speaker cost
$0.00
Event
Customer Briefing
Session
Welcome


Save and Close

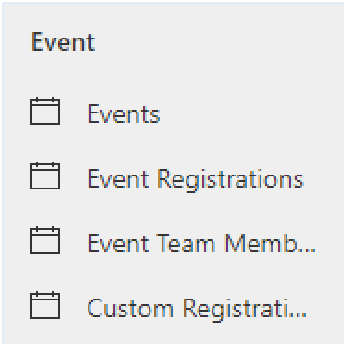
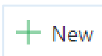
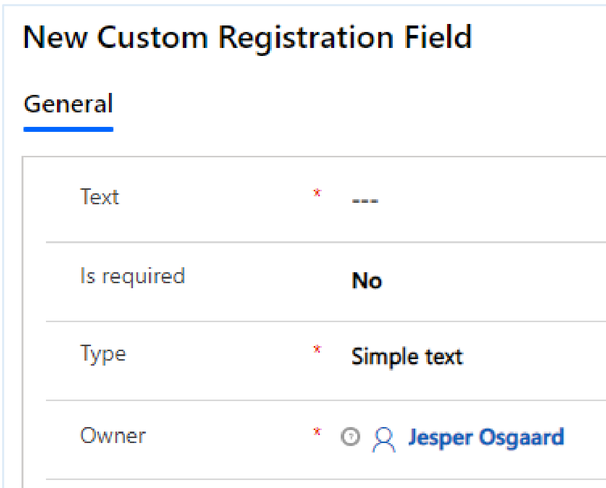

Speaker engagements
Speaker
Type (Speaker)
Speaker cost
Karen Borger
Internal speaker
$0.00

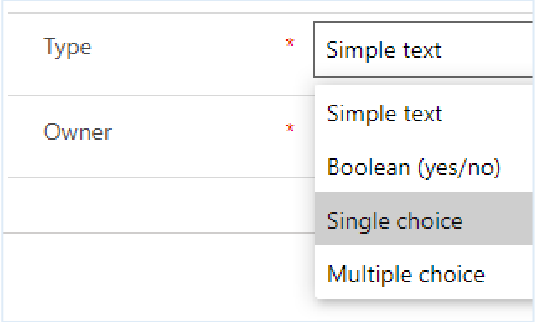

Contents and requirements
Session summary
Welcome Keynote
Session Objectives
Status and What's New
Detailed description
Look at the past year and the year ahead

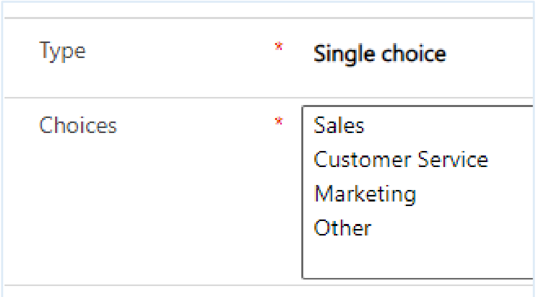
<table>
<tr><td>Repeat for the second session</td><td>
</td></tr>
</table>

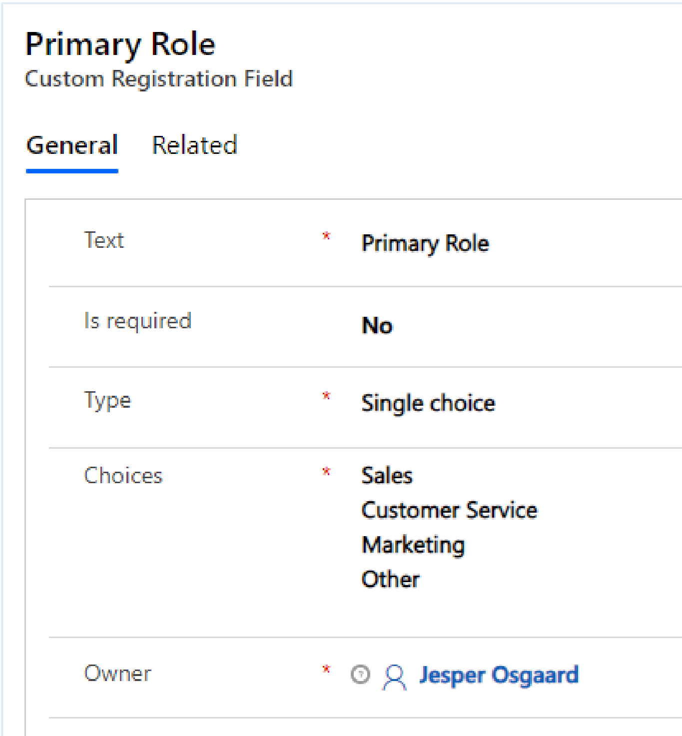
Exercise: Create Custom Registration Field

Custom registration fields lets us ask registrants for additional information when they register for the event. On common examples is meal preferences. In this exercise we will ask the registrant to select her primary (job) role

<table>
<tr><td></td><td>
</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td></td><td>
</td></tr>
</table>

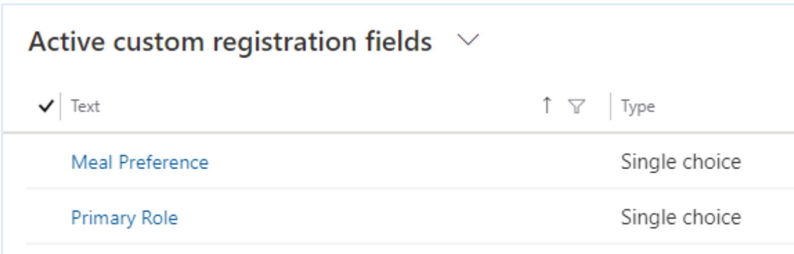




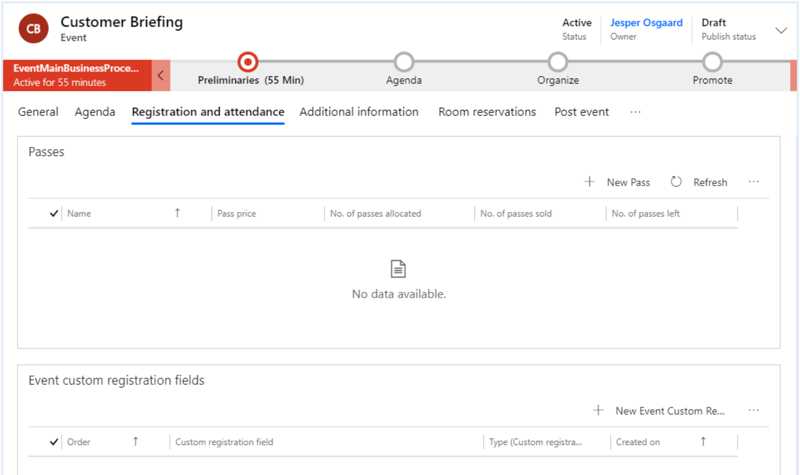


*Our new custom registration field is now listed in the **Active custom registration fields** grid*

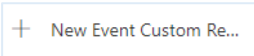
We can create as many custom registration fields we need

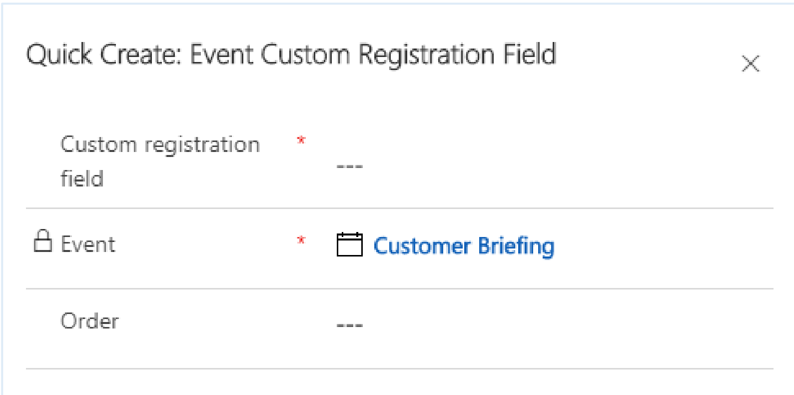


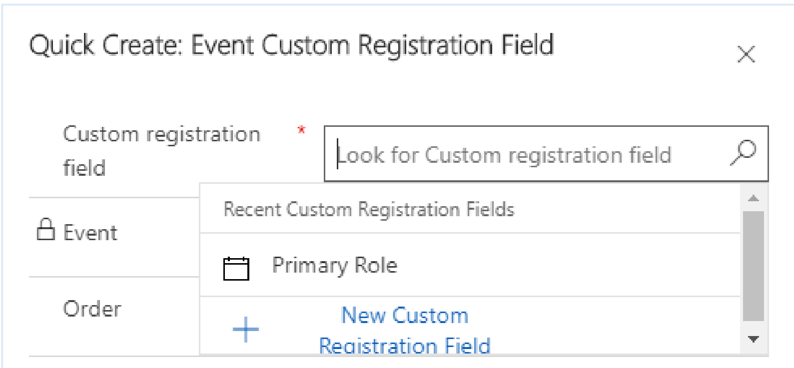
Now navigate back to the event, and click the Registration and attendance tab

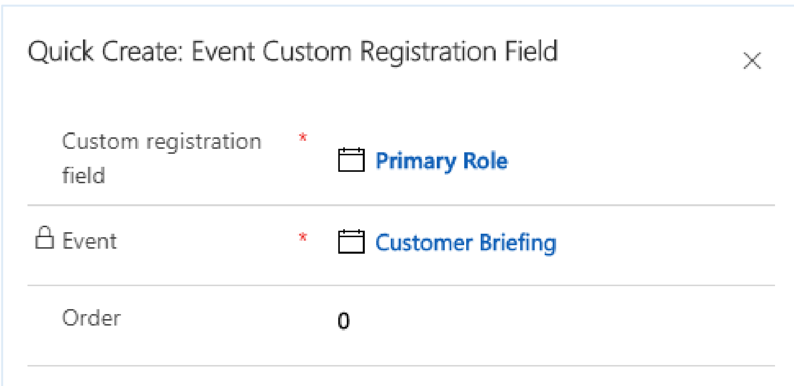


In the Event custom registration fields grid click **New Event Custom Registration Field** to open









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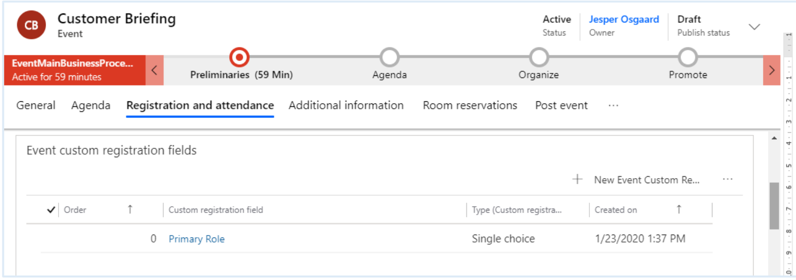
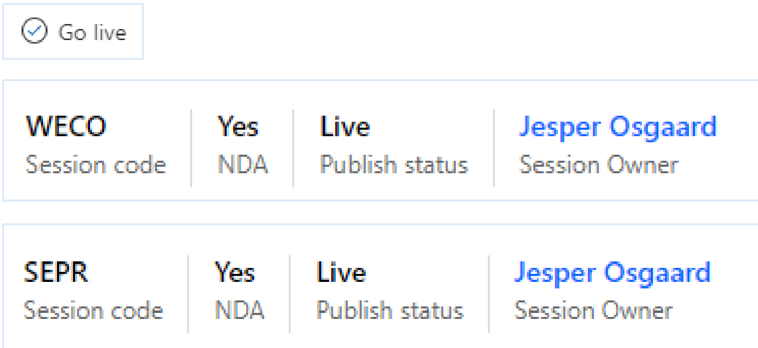
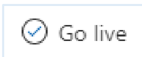
</td></tr>
<tr><td></td><td>
</td></tr>
</table>

Exercise: Publish

<table>
<tr><td>Only published sessions will appear on the event portal

Open each session and click Go Live</td><td>
</td></tr>
<tr><td></td><td>
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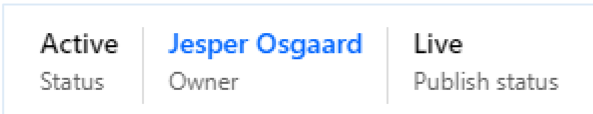
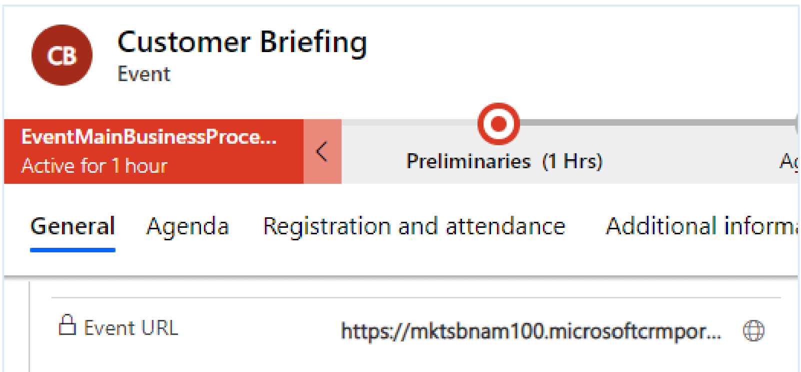
<tr><td></td><td>
</td></tr>
<tr><td></td><td>
</td></tr>
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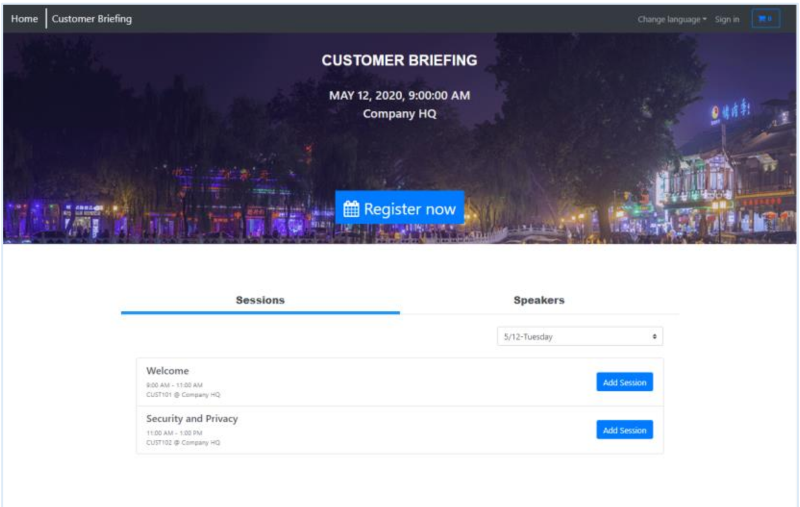
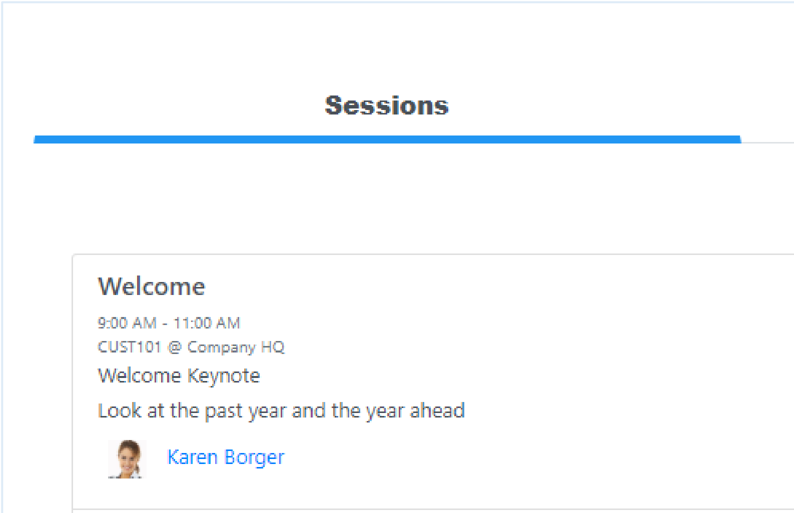
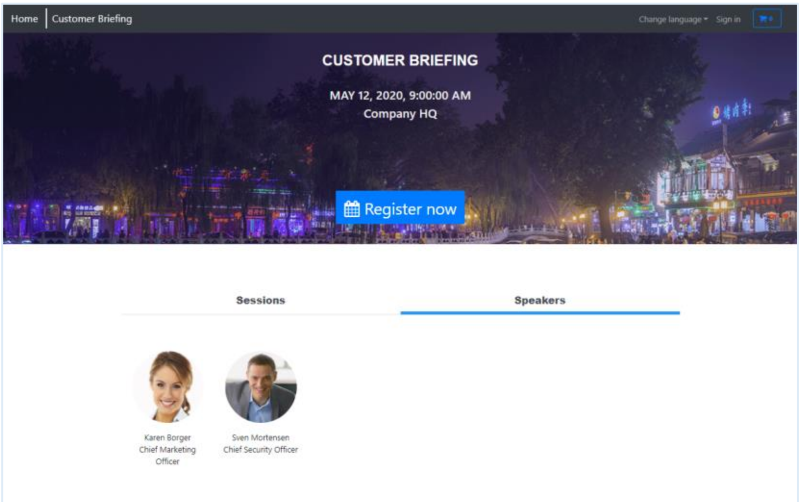
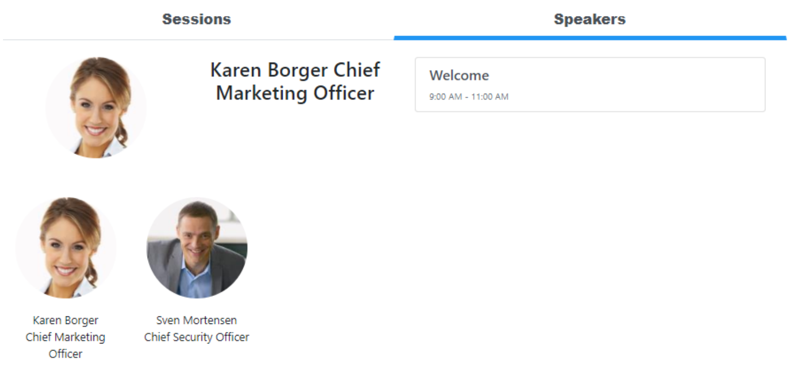
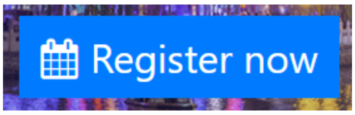
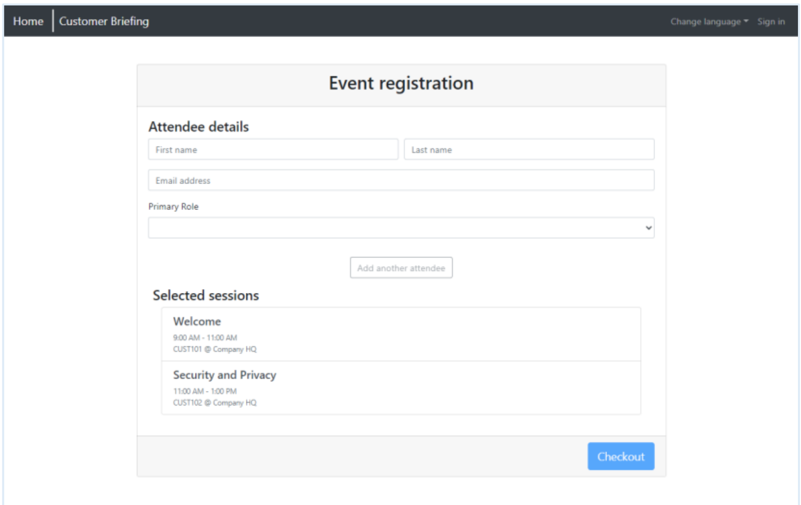
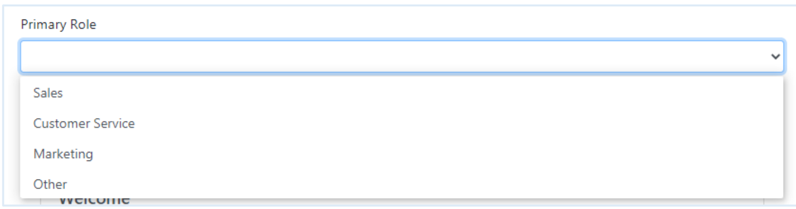

Home
Customer Briefing
Change language
Sign in
CUSTOMER BRIEFING
MAY 12, 2020, 9:00:00 AM
Company HQ
Register now
Sessions
Speakers
5/12-Tuesday
Welcome
Add Session
Security and Privacy
Add Session

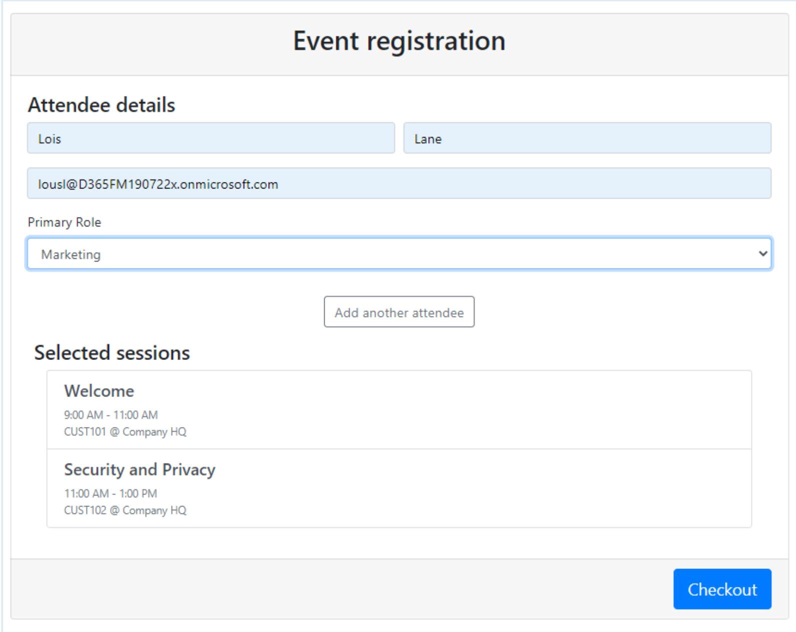

Sessions
Welcome
9:00 AM - 11:00 AM
CUST101 @ Company HQ
Welcome Keynote
Look at the past year and the year ahead
Karen Borger

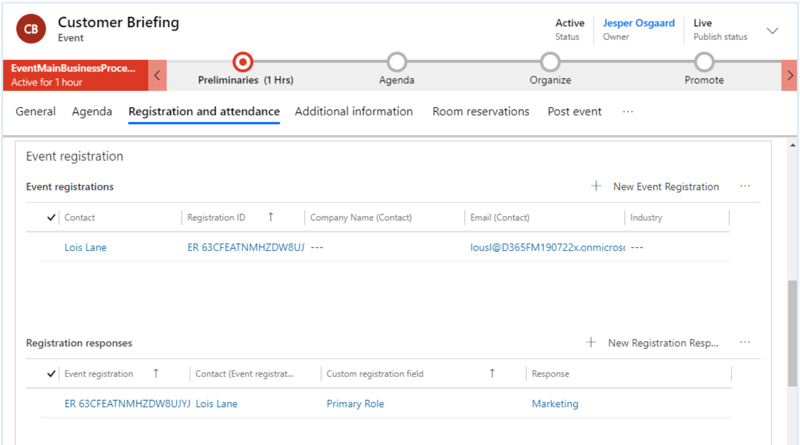

Home
Customer Briefing
Change language
Sign in
CUSTOMER BRIEFING
MAY 12, 2020, 9:00:00 AM
Company HQ
Register now
Sessions
Speakers
Karen Borger
Chief Marketing Officer
Sven Mortensen
Chief Security Officer

Exercise: Create registration


Event registration
Attendee details
Lois
Lane
lousl@D365FM190722x.onmicrosoft.com
Primary Role
Marketing
Add another attendee
Selected sessions
Welcome
9:00 AM - 11:00 AM
CUST101 @ Company HQ
Security and Privacy
11:00 AM - 1:00 PM
CUST102 @ Company HQ
Checkout


Customer Briefing
Event
Active
Status
Jesper Osgaard
Owner
Live
Publish status
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Active for 1 hour
Preliminaries (1 Hrs)
Agenda
Organize
Promote
General
Agenda
Registration and attendance
Additional information
Room reservations
Post event
Event registration
Event registrations
New Event Registration
Contact
Registration ID
Company Name (Contact)
Email (Contact)
Industry
Lois Lane
ER 63CFEATNMHZDW8UJ
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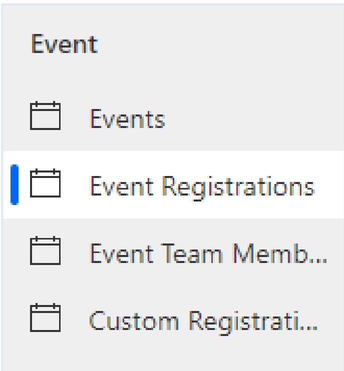
lousl@D365FM190722x.onmicros

Registration responses
New Registration Resp...
Event registration
Contact (Event registrat...
Custom registration field
Response
ER 63CFEATNMHZDW8UJYJ
Lois Lane
Primary Role
Marketing


Event
Events
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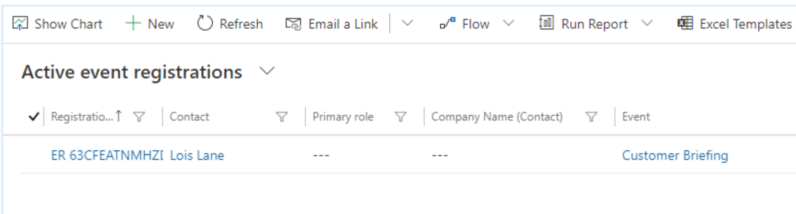

Show Chart
New
Refresh
Email a Link
Flow
Run Report
Excel Templates
Active event registrations
Registratio...
Contact
Primary role
Company Name (Contact)
Event
ER 63CFEATNMHZI
Lois Lane

Customer Briefing

Appendix A: How to Trial Dynamics 365 Marketing

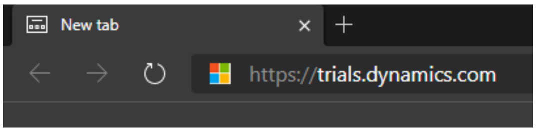
To start a 30-day free trial of Dynamics 365 Marketing, you'll need an existing Dynamics 365 tenant in which you are the admin. To obtain a tenant you can simply start a Dynamics 365 Sales trial.

Follow these steps to start a Dynamics 365 Marketing trial

1. set up a Sales trial (to obtain a tenant)
   - and then -
2. set up a Marketing trial in the new tenant

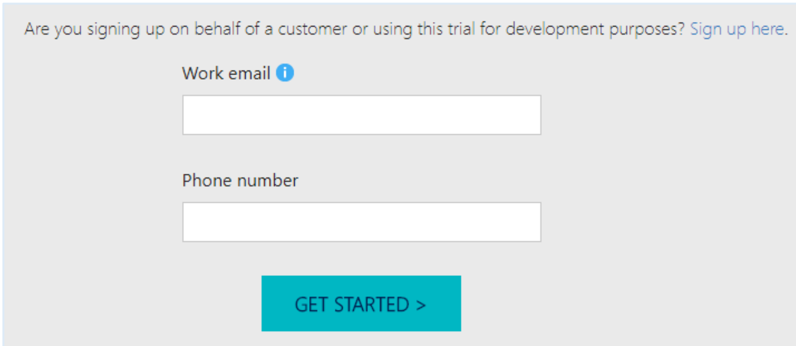
To create a Dynamics 365 Sales trial

Open a browser in private/incognito mode and navigate to https://trials.dynamics.com



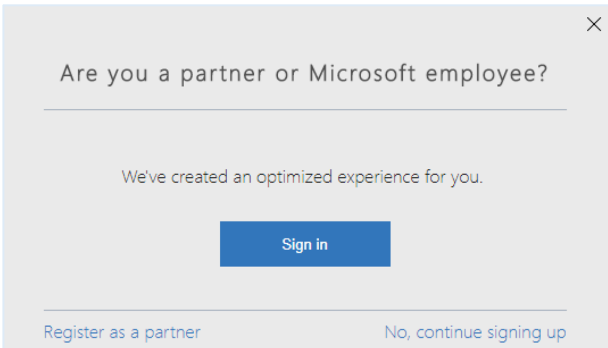
Do not fill out the textboxes or click the Get Started button.

Just click **Sign up here** in the headline "Are you signing up on behalf of a customer or using this trial for development purposes?" to open the **Are you a partner or Microsoft employee?** dialog



Do not click the Sign in button

In the **Are you a partner or Microsoft employee?** dialog click **No, continue signing up** to display the **Welcome, let's get to know you** dialog

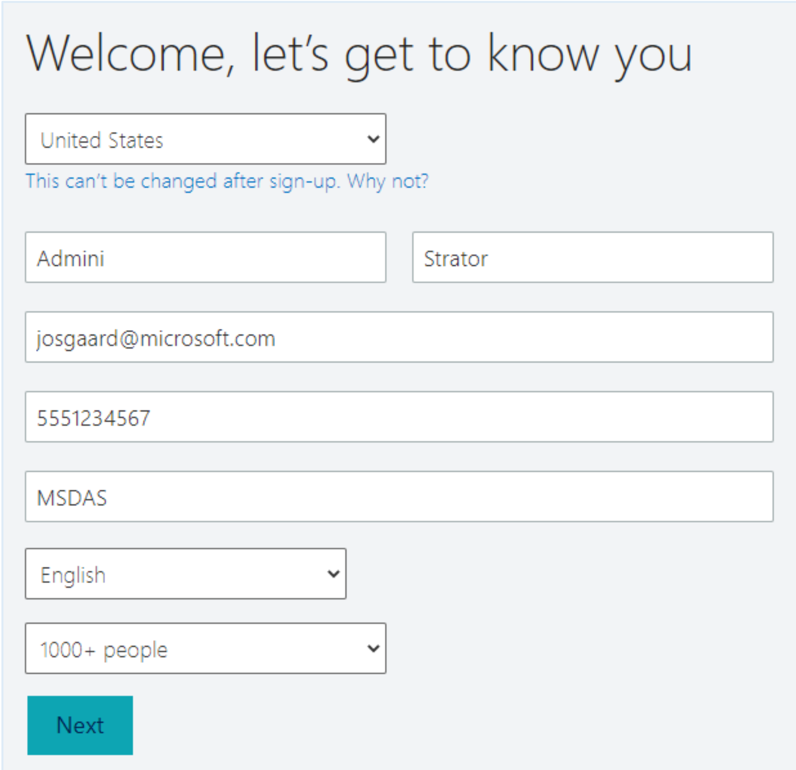


In the **Welcome, let's get to know you** dialog provide the information needed

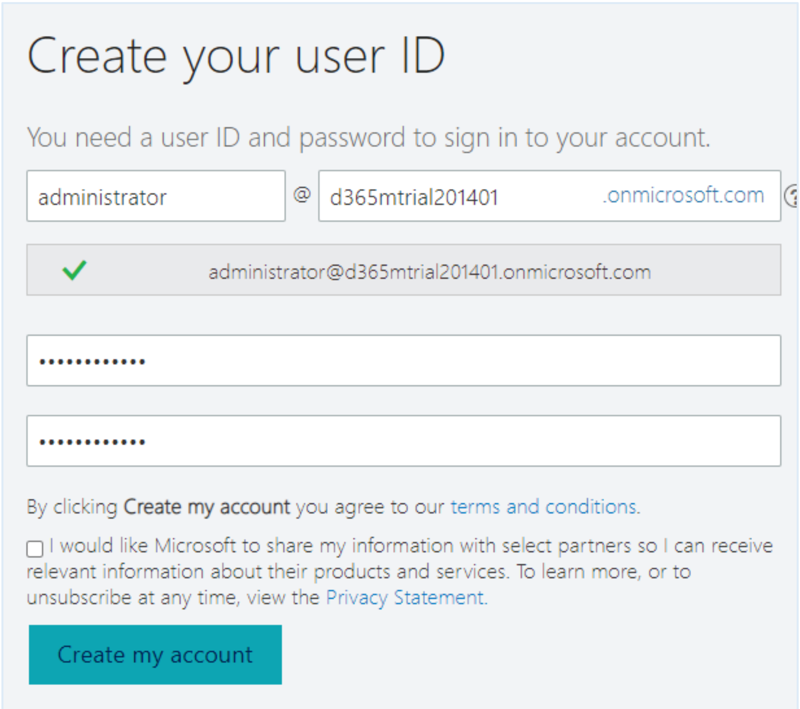
The first name and last name will be the name used for the administrator account

Your email address is needed for a confirmation mail only

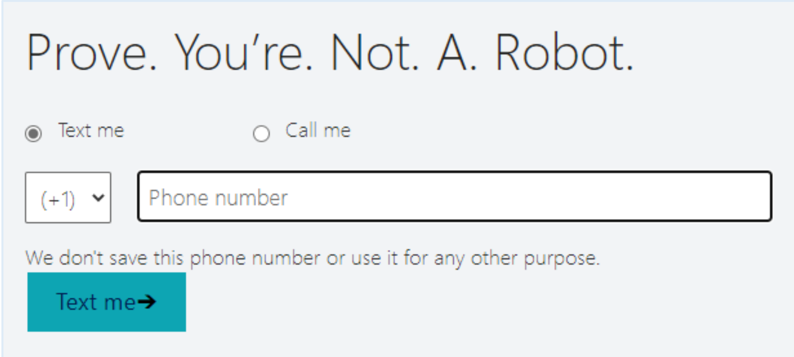
Click **Next** to open the **Create your user ID**



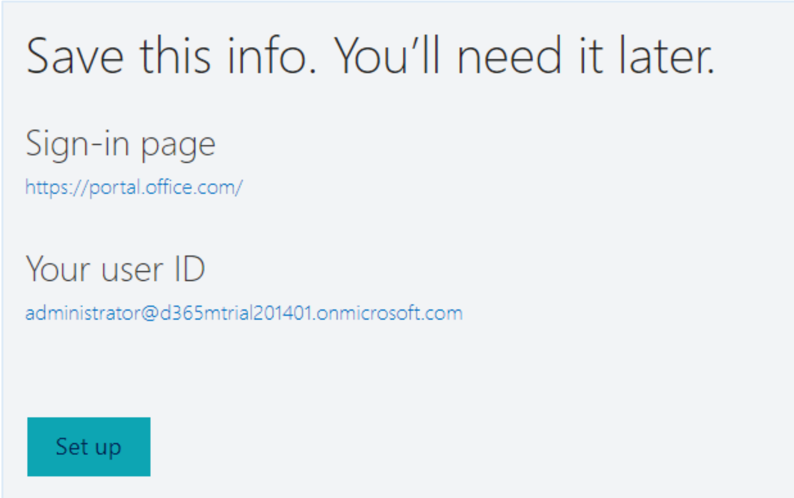
Provide a username, a unique domain name, a password and then click **Create my account**



Provide your mobile number, click **Text me**, and type the two-factor authentication code we text to you.

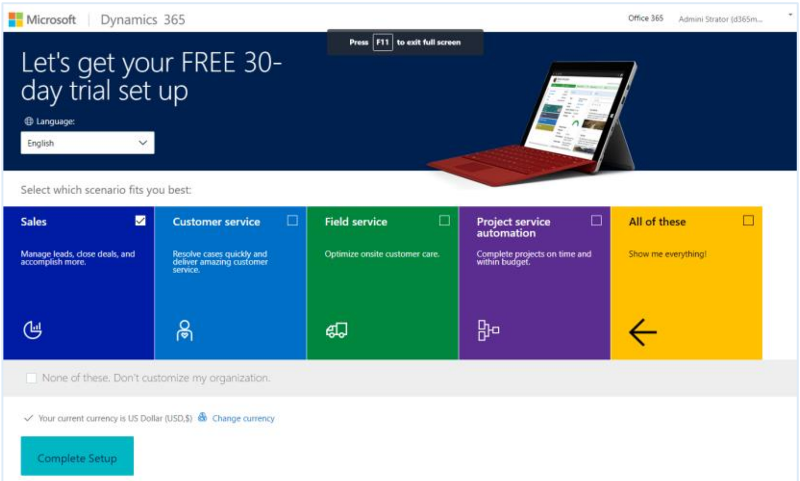


Click **Set up**

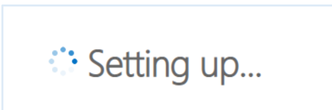


Just select to trial the Sales app – this trial is only to provide you with a tenant in which you are the admin, not necessarily trialing the Sales app.

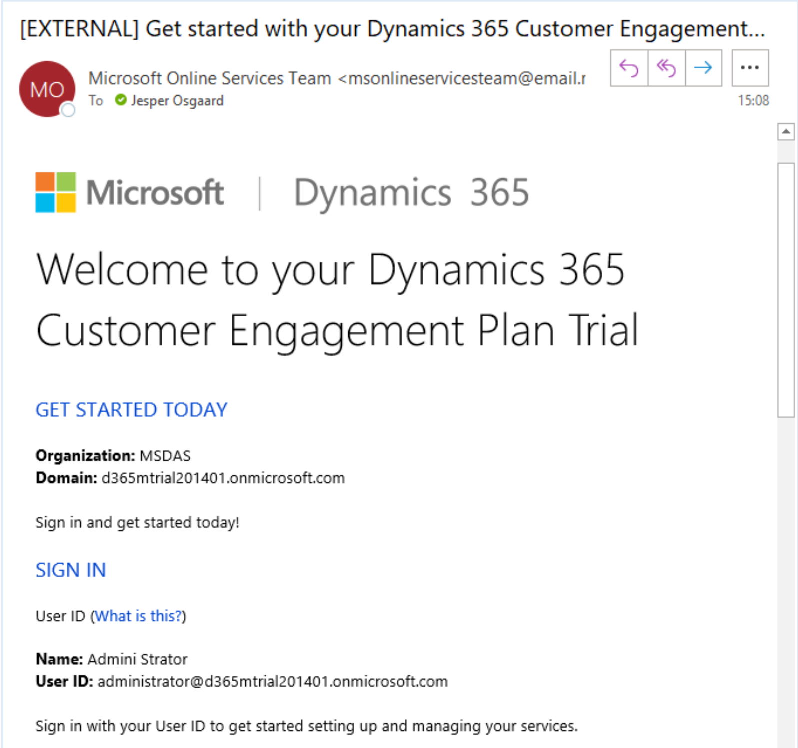
Click **Complete Setup**



Let the setup complete

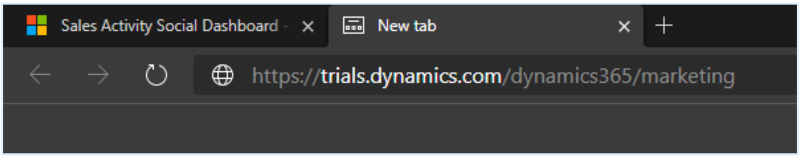


You will receive an email confirming your trial



To create the Dynamics 365 Marketing trial

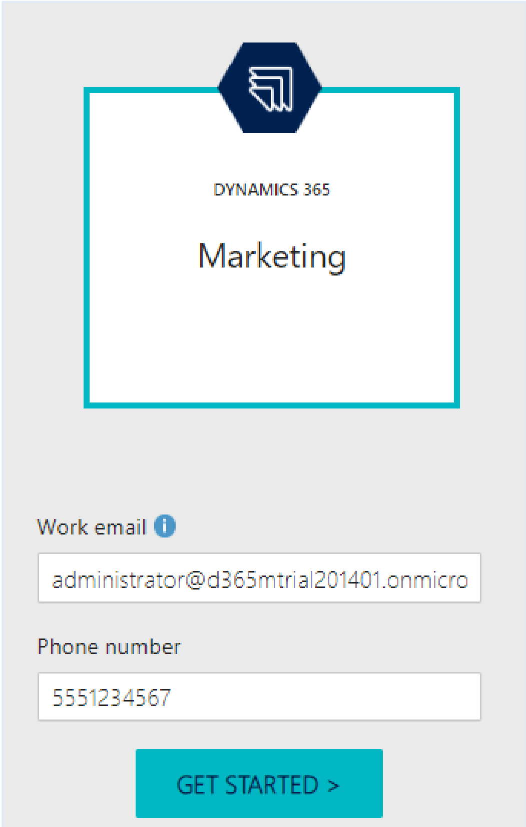
Still in the browser session (the tenant) open a new tab in the browser and navigate to https://trials.dynamics.com/dynamics365/marketing



Type the email address of your admin user from above (important)

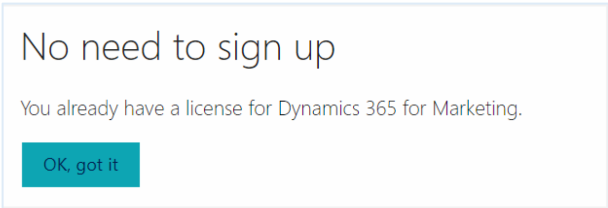
Type a phone number (any will do – not used)

Then click **Get Started**

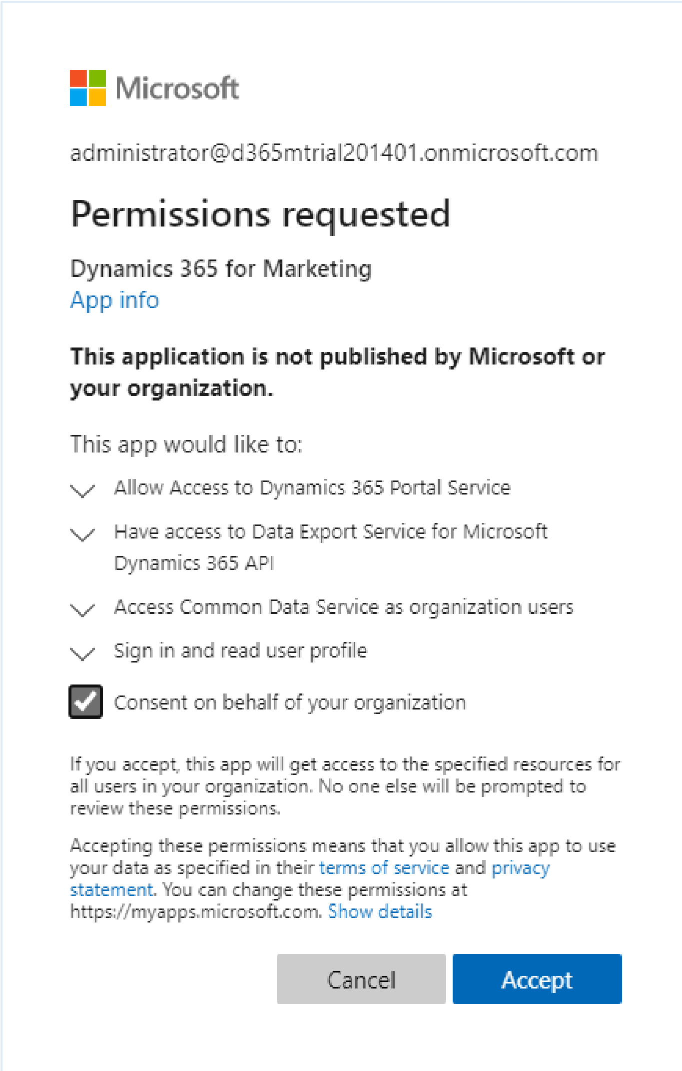


The system recognizes you have a license and a tenant to provision the Dynamics 365 Marketing in

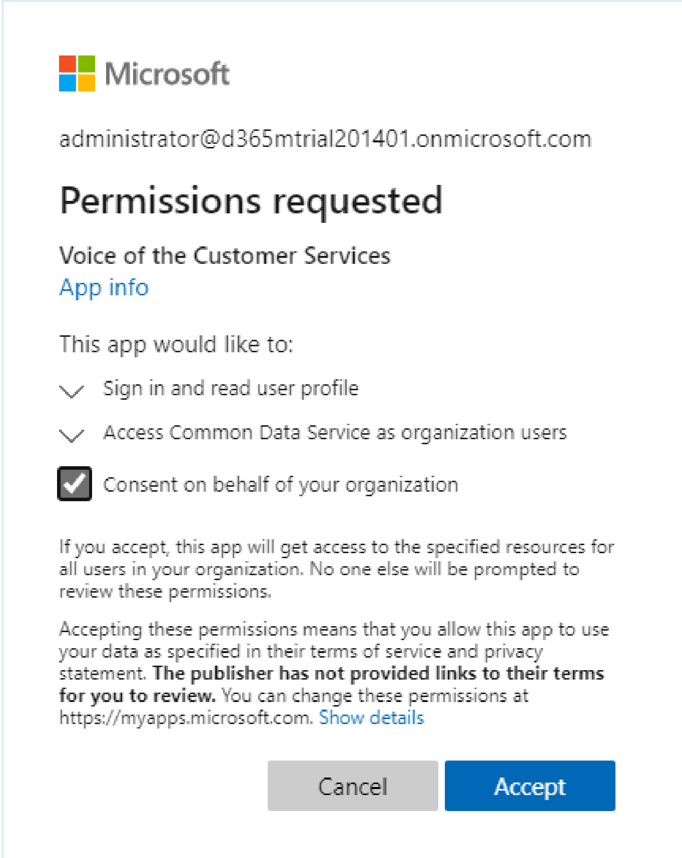
Click **OK, got it** to proceed



Follow the multi dialog Dynamics 365 Marketing provision guide and provide access to the required services

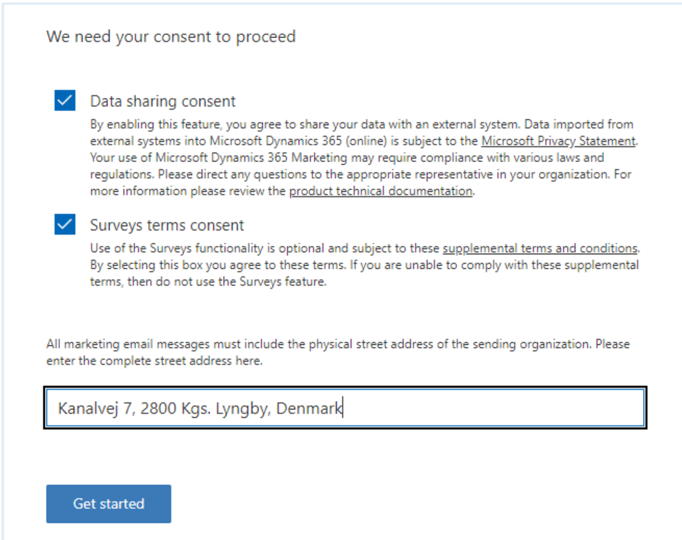


Provide permission to the survey service



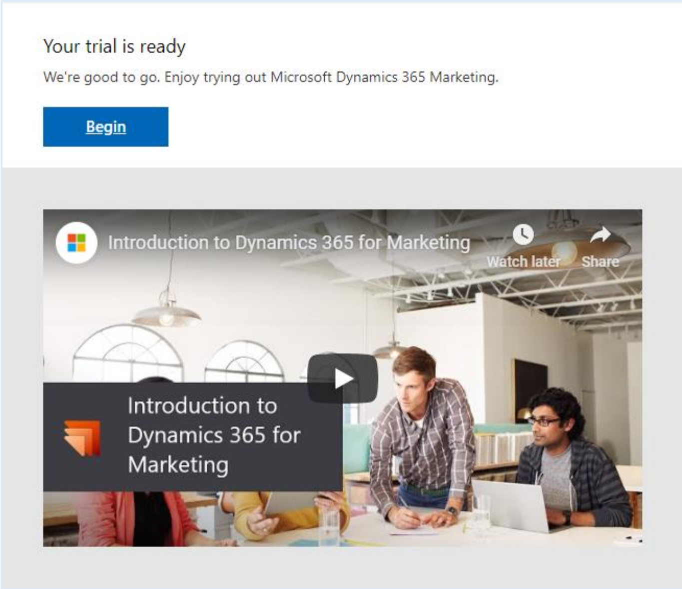
Provide consent and type your address

The address you provide here is the address used in emails as physical address (it can be edited later)



Trial is provisioned

Click **Begin** to access the app



Note the process will create a new trial org (its name will be whatever you picked for domain above with a zero appended)

Example:

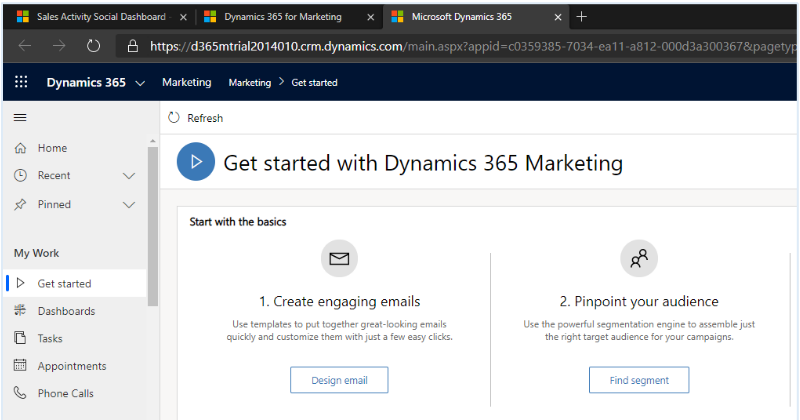
if your sales trial was

- *myhouse.crm.dynamics.com*

the name of the marketing trial will be

- *myhouse0.crm.dynamics.com*

You will not need the production instance (the Sales app trial)



See also	"Add users to a Marketing trial running on a trial tenant" https://docs.microsoft.com/en-us/dynamics365/marketing/trial-signup#add-users-to-a-marketing-trial-running-on-a-trial-tenant "Sign up for a free trial of Dynamics 365 Marketing" https://docs.microsoft.com/en-us/dynamics365/marketing/trial-signup "Dynamics 365 Marketing limits for trials" https://docs.microsoft.com/en-us/dynamics365/marketing/trial-preview-limits

Important	If you need to add users to a marketing trial you will need to create an Office 365 trial too – the admin will need to approve users. Approval mails are sent to the admins mailbox. Best practive will be to add an Office 365 E3 trial while setting up the Sales trial, and add the E3 license to the admin

Appendix B: More to Explore

Documentation

As mentioned in the beginning of this guide, there is lots of topics in the documentation (docs.microsoft.com) you can dive into to educate yourself further. You have basic tutorials, advanced tutorials, focused topics, and developer content.

Basic tutorials

- Create a dynamic segment
- Create a marketing email and go live
- Create a simple customer journey with email messaging
- Create a landing page with a form
- Create an interactive customer journey with triggers and signup
- Set up automatic lead generation and scoring

Advanced tutorials

- Generate activities from a customer journey
- Manage images for landing pages and email messages
- Create templates for emails, pages, forms, and journeys
- Track website visits, social media clicks, and banner clicks
- Set up subscription lists and subscription centers

Marketing with Dynamics 365

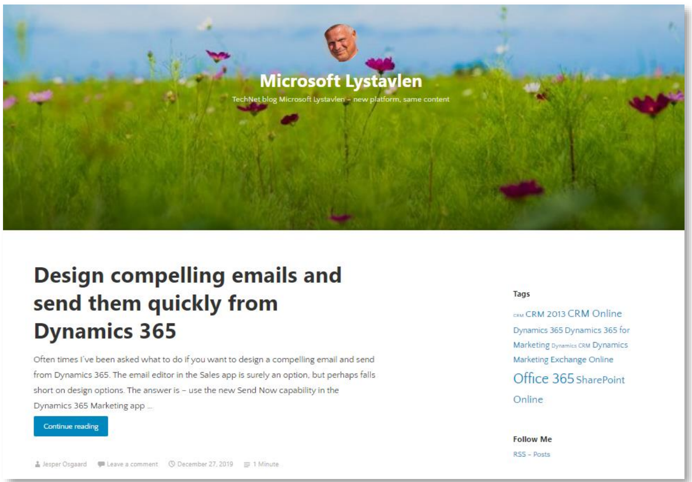
- Design digital content
- Email marketing overview
- Create and deploy marketing pages
- Integrate with landing pages on external websites
- Create automated campaigns
- Working with segments
- Market to leads
- Score and manage leads
- Plan and manage events
- Create interactive features with or without portals
- Create and run online surveys
- Integrate with LinkedIn Lead Gen

Extend the system

- Extend customer journeys using custom channels
- Create a custom channel
- Retrieve interactions for a contact
- Metadata reference for your organization

Blog Posts

You can also find a bunch of Dynamics 365 Marketing focused blog posts on the blog “Microsoft Lystavlen” (aka.ms/lystavlen) by Jesper Osgaard, Sr. Technical Specialist, Microsoft.



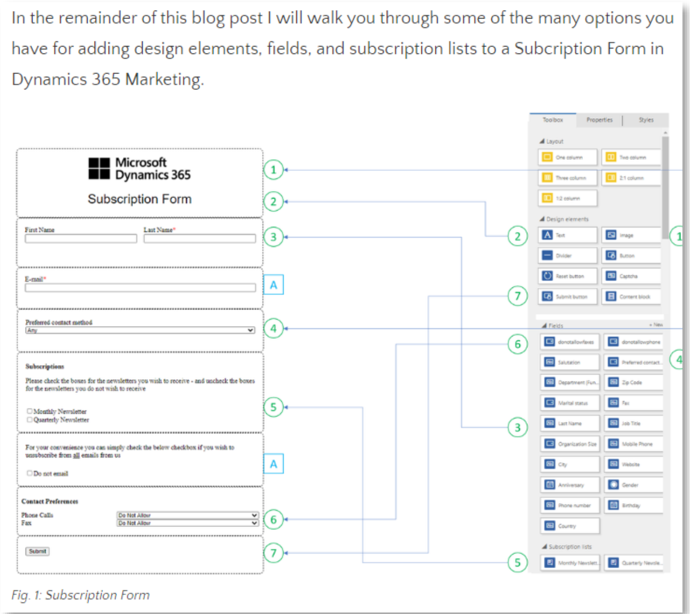


Fig. 1: Subscription Form

- ⇒ Try Dynamics 365 for Marketing
- ⇒ How to Create Marketing pages in the new Dynamics 365 for Marketing
- ⇒ Interactive Customer Journeys in Dynamics 365 for Marketing
- ⇒ Lead Scoring in Dynamics 365 for Marketing
- ⇒ Event Management in Dynamics 365 for Marketing — Quick Start Guide
- ⇒ How to Change Portal Banner Images in the Dynamics 365 for Marketing Event Portal
- ⇒ Dynamics 365 for Marketing Event Registration Experience
- ⇒ Segments in Dynamics 365 for Marketing
- ⇒ Working with Subscription Centers in Dynamics 365 for Marketing
- ⇒ Add advanced logical processing to your email design in Dynamics 365 for Marketing
- ⇒ How to embed Dynamics 365 for Marketing Forms on you own website
- ⇒ Marketing Insights for Sellers
- ⇒ GDPR compliance made easy — consent management in Dynamics 365 for Marketing
- ⇒ How to Add Waitlists to Events in Dynamics 365 for Marketing
- ⇒ How to Add Users to a Marketing Trial
- ⇒ Reusable Content Blocks — First Look
- ⇒ Avoid Messaging Overload with the New Marketing Calendar
- ⇒ How to Build a Segment of Repeat Website Visitors in Dynamics 365 for Marketing
- ⇒ Social Posting from Dynamics 365 for Marketing — First Look
- ⇒ Optimal Sending Time in Dynamics 365 for Marketing — First Look
- ⇒ Comparison: Dynamics 365 for Marketing and ClickDimensions
- ⇒ How to build a segment Off of a static marketing list
- ⇒ Session Registrations in Dynamics 365 for Marketing
- ⇒ First Look: A/B testing in Dynamics 365 for Marketing
- ⇒ First Look: The New Spam Score Prediction in Dynamics 365 for Marketing
- ⇒ How to update Dynamics 365 Marketing
- ⇒ How to build your own subscription form in Dynamics 365 Marketing
- ⇒ Design compelling emails and send them quickly from Dynamics 365