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CUSTOMER
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Dynamics 365 Marketing Journey and Power Automate

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Agenda

- Dynamics 365 Marketing
- Real-Time Marketing
- Real-Time marketing journey
- Power Automate
- How to connect?
- DEMO

Dynamics 365 Marketing

- Engage customers in real-time
- Personalize customer experiences with AI
- Build seamless experiences through collaboration
- Win customers and earn loyalty faster

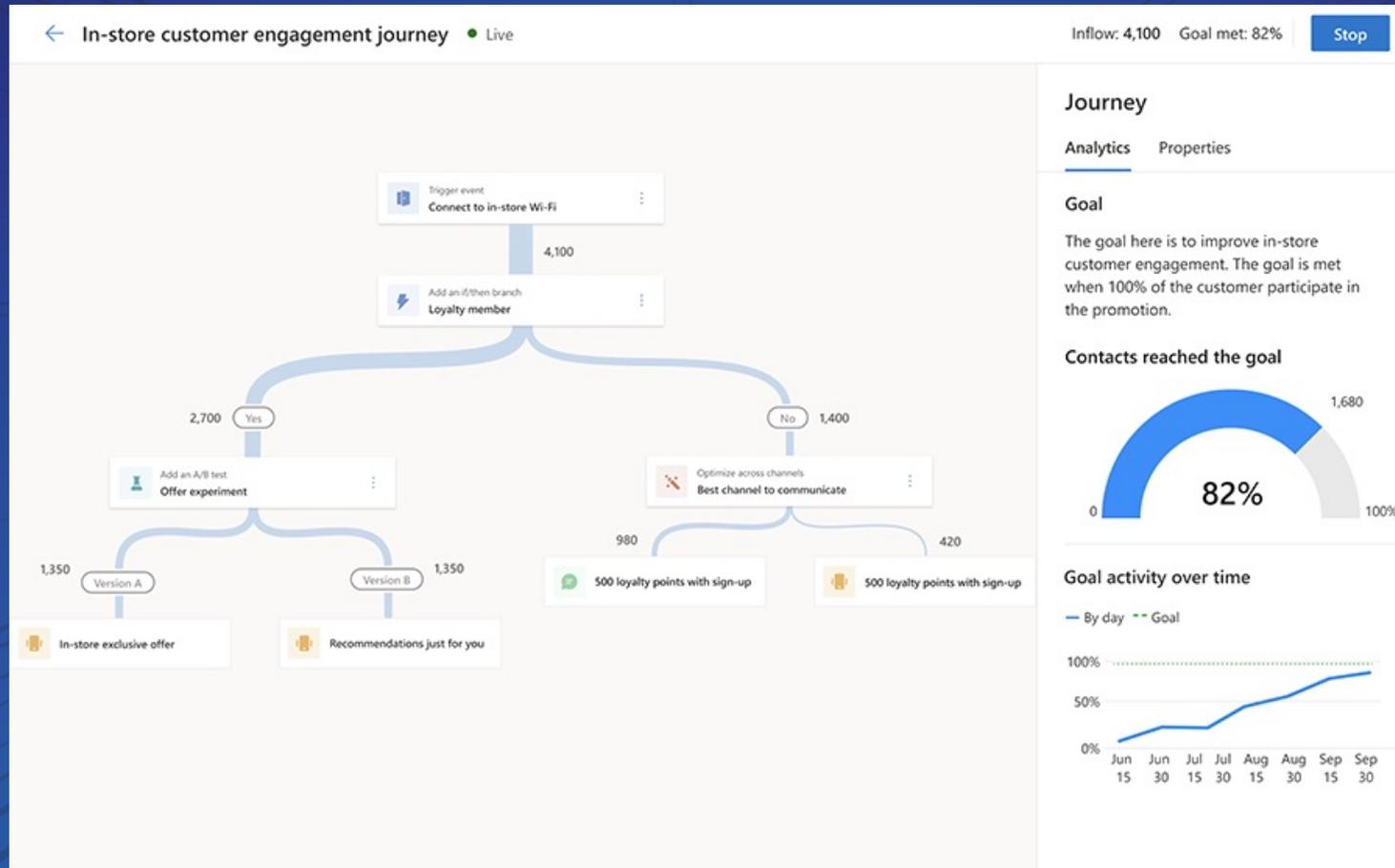
Real-Time Marketing

- Customer-led experiences
- Orchestrate real-time journeys
- Deliver one-on-one experiences
- Take advantage of real-time customer data changes
- Simplify journey management

Real-Time marketing journey

- Manage segments in real-time marketing
- Work with triggers in real-time marketing
- Journey in real-time marketing
- Business goals and measure
- Use attribute
- A/B test
- AI-driven, run-time channel optimization
- Triggers from a journey for Power Automate flow

Real-Time marketing journey



Power Automate

- Automate quickly and more securely
- Low-code / drag-and-drop
- Boost efficiency
- Enhance workflows with AI

Power Automate

The screenshot shows a Power Automate flow with the following steps:

- When a file is created (properties only)**: Trigger step.
- Get my profile (V2)**: Action step.
- Create an approval (V2)**: Action step with the following configuration:
 - Approval type: Approve/Reject - First to respond
 - Title: Review new SharePoint file ' `body/(FilenameWithExtension)` '
 - Assigned to: (Empty)
 - Details:
 - **Added to:** `body/(Path)`
 - **Created by:** `body/Author/DisplayName` < `body/Author/Email` >
 - **Created time (UTC):** `body/Created`
 - Item link: `body/(Link)`
 - Item link description: `body/(FilenameWithExtension)`
- Apply to each**: Loop step with 'Approvers' selected as the output from the previous step.
- Run a flow built with Power Automate for desktop**: Action step.
- Send an email**: Action step.

How to connect?

- **Real-Time Marketing**
 - Select a custom trigger
 - Understand the selected trigger usage
 - Map attributes
- **Power Automate**
 - Create a cloud flow that starts with When an action is performed
 - Fill in the required fields
 - Start adding steps to the flow

Select a custom trigger

The screenshot displays the Microsoft Dynamics 365 Marketing interface for a 'Post purchase journey' in 'Draft' status. The main canvas shows a flowchart with the following steps:

- Trigger:** New purchase
- Action:** Send an email: Order Confirmation Email
- Action:** Attribute
- Decision:** A decision node with 'Yes' and 'No' paths.
- Yes Path:** Leads to an 'Exit' node.
- No Path:** Leads to an 'Activate a custom trigger: Add to Nurture Journey' node, which then leads to an 'Exit' node.

On the right side, a dialog box titled 'Activate a custom trigger' is open. It contains the following elements:

- Select a custom trigger ***: A search bar with 'Add to Nurture Journey' selected.
- Used in:** 1 live journey
- Map attributes**: A section with the instruction 'Each attribute must be mapped to a data source. To get started, select an attribute.' and a search bar containing 'Source Campaign'.

The interface includes a left-hand navigation pane with categories like Engagement, Journeys, Analytics, Triggers, Audience, Segments, Consent center, Channels, Emails, Push notifications, Text messages, Assets, Library, Templates, and Content blocks. The top bar shows 'Dynamics 365 | Marketing' and various utility icons. The bottom right corner of the canvas has a zoom control set to 100% and a 'Reset' button.

Understand the selected trigger usage

The screenshot displays the Microsoft Dynamics 365 Journey Builder interface. The main canvas shows a flowchart starting with a 'Trigger' step labeled 'New purchase'. This is followed by a 'Send an email' step labeled 'Order Confirmation Email', and then an 'Attribute' step. A decision diamond follows, with a 'Yes' path leading to an 'Exit' step and a 'No' path leading to an 'Activate a custom trigger' step labeled 'Add to Nurture Journey', which then leads to another 'Exit' step.

Overlaid on the interface are two configuration panels:

- Usage: Add to Nurture Journey**: A panel showing that when a customer activates the custom event trigger in this journey, it gets activated in these journeys too. It includes a table:

Journey	Status
Nurture Rewards Members Journey	Live
- Activate a custom trigger**: A panel for configuring the trigger. It includes a dropdown menu for 'Select a custom trigger *' with 'Add to Nurture Journey' selected. Below it, it states 'Used in: 1 live journey' and provides a tip: 'You can also use a trigger to activate a Power Automate flow. Learn more'. There is also a 'Map attributes' section with a dropdown for 'Source Campaign' and a 'Map attribute' link.

Map attributes

Set trigger fields

To map the attribute, select the corresponding data source.

Attribute

Attribute

Value

Save Cancel

Map attributes

Each attribute must be mapped to a data source. To get started, select an attribute.

Source Campaign

Map attribute

Create a cloud flow

Build an automated cloud flow



Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

Flow name:

Choose your flow's trigger * (i)

<input checked="" type="checkbox"/>	 When an action is performed Microsoft Dataverse (i)
<input type="checkbox"/>	 When a row is added, modified or d... Microsoft Dataverse (i)
<input type="checkbox"/>	 When an action is performed Microsoft Dataverse (i)
<input type="checkbox"/>	 When a row is deleted Microsoft Dataverse (legacy) (i)
<input type="checkbox"/>	 When a row is added Microsoft Dataverse (legacy) (i)
<input type="checkbox"/>	 When a row is modified Microsoft Dataverse (legacy) (i)

Start adding steps to the flow

The screenshot displays the Microsoft Power Apps interface. The top navigation bar includes 'Power Apps', a search bar, and environment information 'Environment mktcxptip05070515sq8...'. The left sidebar lists navigation options: Home, Learn, Apps, Create, Dataverse, Flows (selected), Chatbots, AI Builder, Cards, and Solutions. The main workspace shows a flow titled 'Send to sales agent to upsell rewards'. The flow consists of two steps:

- When an action is performed**:
 - Catalog: Cxp
 - Category: Custom
 - Table name: (none)
 - Action name: Send to a Sales agent
- Add a new row**:
 - Table name: Opportunities
 - Currency (Currencies): Choose the local currency for the record to make sure budgets are reported in!
 - Topic: [partially visible]

An arrow points from the 'Send to a Sales agent' action in the first step to the 'Add a new row' step in the second step. The top right of the workspace contains utility icons: Undo, Redo, Comments, Save, Flow checker, and Test.

DEMO

The image features a central, complex geometric pattern in shades of pink and purple, resembling a stylized flower or a starburst. This central pattern is surrounded by a dense field of radiating lines in bright green and yellow, creating a sense of dynamic energy and movement. The entire composition is set against a dark blue background with a fine, repeating pattern of small white dots, which adds a textured, halftone-like quality to the overall design.



Thank you!