

DYNAMICSCON PRESENTATION

DYNAMICSCON

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DynamicsCon.com



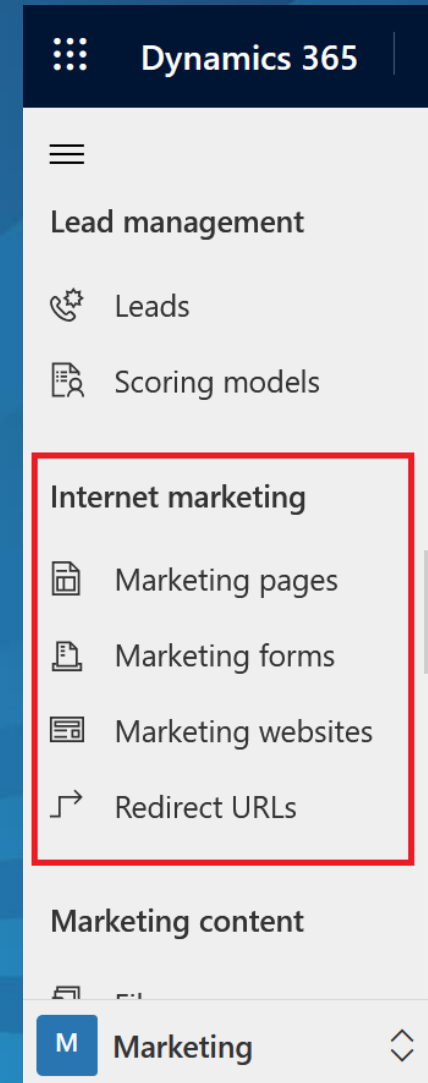
Forms to Integrate D365 CRM with Your Website!

Agenda

- ★ About Marketing Forms
 - Capture external forms data
 - Different templates for different purpose
 - Creating scripts for forms to embed in site
- ★ About - Segments and Customer Journey
- ★ Quick Demo
- ★ Q&A

Marketing Forms

- ★ Available inside Internet Marketing Section
- ★ Ready to use templates available
- ★ Multiple forms templates for different purpose
- ★ Design your own Custom form
- ★ Capture external form
- ★ Direct integration with Contact and Lead entity



Capture external forms data

- ★ Capture your already created form
- ★ Map Dynamics fields data with external form fields
- ★ View submitted data directly from the insights
- ★ Use forms in customer journey
- ★ Add script to your page to
- ★ enable form capture.

Capture a form

Enter the form location

Check for the tracking script

Choose a form

Map the fields

Enter the form location

To capture the form, we need to access the tracking script on the webpage. Enter the complete website URL and we'll check for the script.

Enter a URL

Once you have entered the URL, the tracking verification process will continue in a new tab.

Next

Cancel

Different templates for different purpose

- ★ Design your own custom form with custom HTML design.
- ★ Use readymade templates available for different purpose of the marketing.
- ★ Use forms in customer journey for more reach of the form.

Purpose

--Select--

--Select--

Contact capture

Newsletter subscription

Lead generation

Collateral download

Event registration

Event feedback

Structural

Double Opt-In, Email based confirmation

Update contacts/leads

--Select--

--Select--

Contacts and leads

Only contacts

Only leads

No update

Creating scripts for forms to embed in site

- ★ Create script for forms using Form Page options
- ★ Select hosting as script or iframe to embed in site
- ★ Add Success and Error messages to display on form submission
- ★ Add redirection url on successful submission of the form
- ★ Add Success and Error image URL for the form

External Hosting
Format

I want to host it as a script

ⓘ Please choose the format of the external hosting. By choosing host as a script option, marketing form will uptake styles of the hosting website, the form becomes a part of the website layout, also the form will track clicks made on the website. By choosing host as an iframe option, marketing form will stay isolated from the layout of the website, styles of the form will be sandboxed, also the form will not be tracking clicks made on the website.

ⓘ `<div data-form-block-id="faa407be-2788-ec11-93b0-000d3aca1b38"></div> <script src="https://mktdplp102cdn.azureedge.net/public/latest/js/form-loader.js?v=1.80.2009.0"></script> <div id="d9IKK-fy_3l-lwKykvIRhXUWx-F65dU1l-Ugv0D7Xf6o"></div> <script src="https://mktdplp102cdn.azureedge.net/public/latest/js/ws-tracking.js?v=1.80.2009.0"></script> <div class="d365-mkt-config" style="display:none" data-website-id="9IKK-fy_3l-lwKykvIRhXUWx-F65dU1l-Ugv0D7Xf6o" data-hostname="0a6f5cb11a7f4697809750a12257d002.svc.dynamics.com"></div>`

Segments

- ★ Collection of contacts
- ★ Use segments for marketing purpose like newsletters
- ★ Use segments in Customer Journey to send emails
- ★ Dynamic and Static type of segment for different contact collections

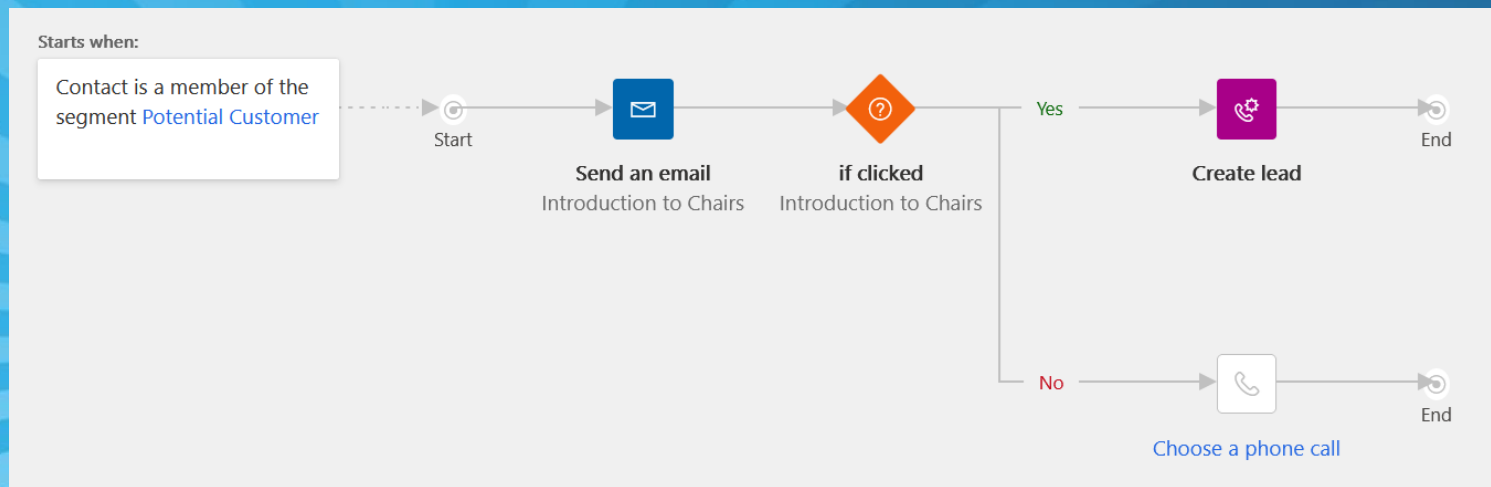
The screenshot shows a segment builder interface for a segment named "Email Delivered". The interface includes a search bar, a list of criteria, and logical connectors. The criteria are:

- Message is Select the email that the contact received
- AND Timestamp is on or after Email delivered after date, inclusive
- AND Timestamp is before Email delivered before date, exclusive

There is an "Add" button at the bottom left. The interface also includes "Undo", "Redo", and "Natural view" options.

Customer Journey

- ★ Target specific contact segments for marketing
- ★ Send emails to the segments in bulk
- ★ Add conditions for different steps for journey
- ★ View insights of the journey with KPI
- ★ Use ready to use customer journey templates



Quick Demo

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Questions and Answers

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