MICROSOFT DYNAMICS MARKETING

TRIAL GUIDE

Microsoft Dynamics Marketing Trial Guide
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Contents

Introduction

This trial guide is intended to give you a first impression of Microsoft Dynamics Marketing. You will learn how to create a 30 day trial, setup your company, create contacts, marketing lists, emails, build and execute a campaign and more.

Setting up your free 30 day trial

To setup your free 30 day trial follow these easy steps

1. Start your browser in Private/Incognito mode
2. Enter this URL: http://go.microsoft.com/fwlink/?LinkId=399078&clcid=0x409
3. You are presented with our "Welcome" guide

4. Select your country and provide your name, email, phone number, and company name

5. Type your preferred user name and the name you will use for your Office 365 tenant (must be unique)
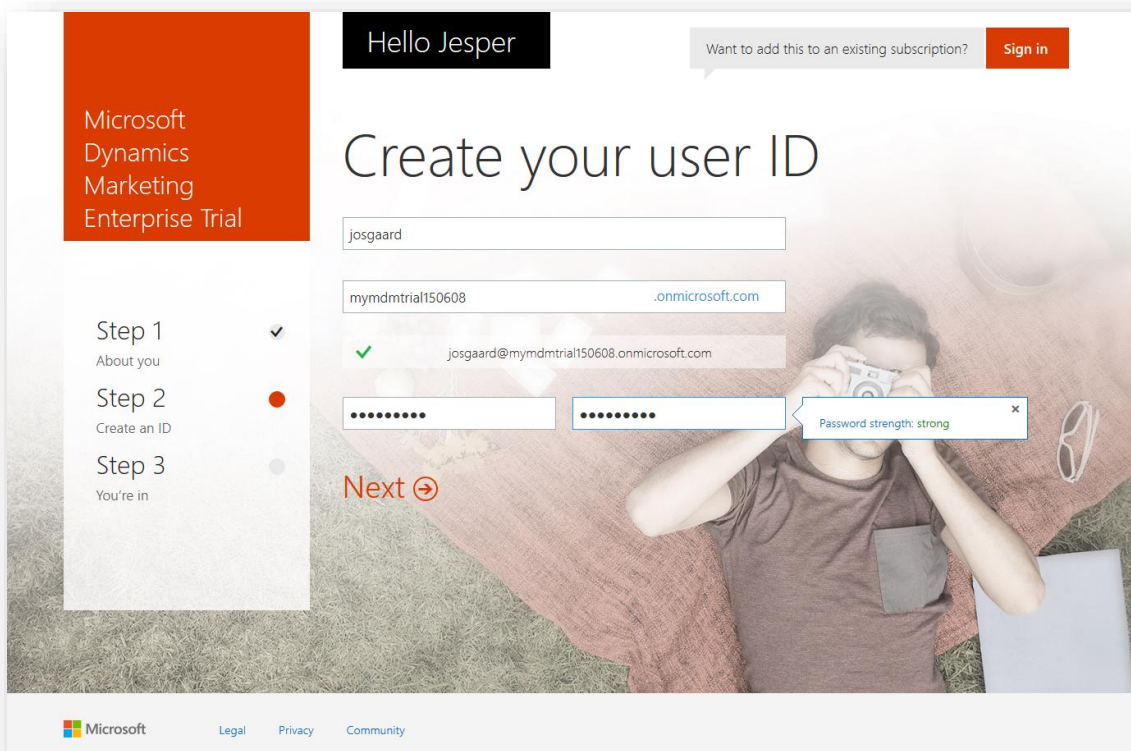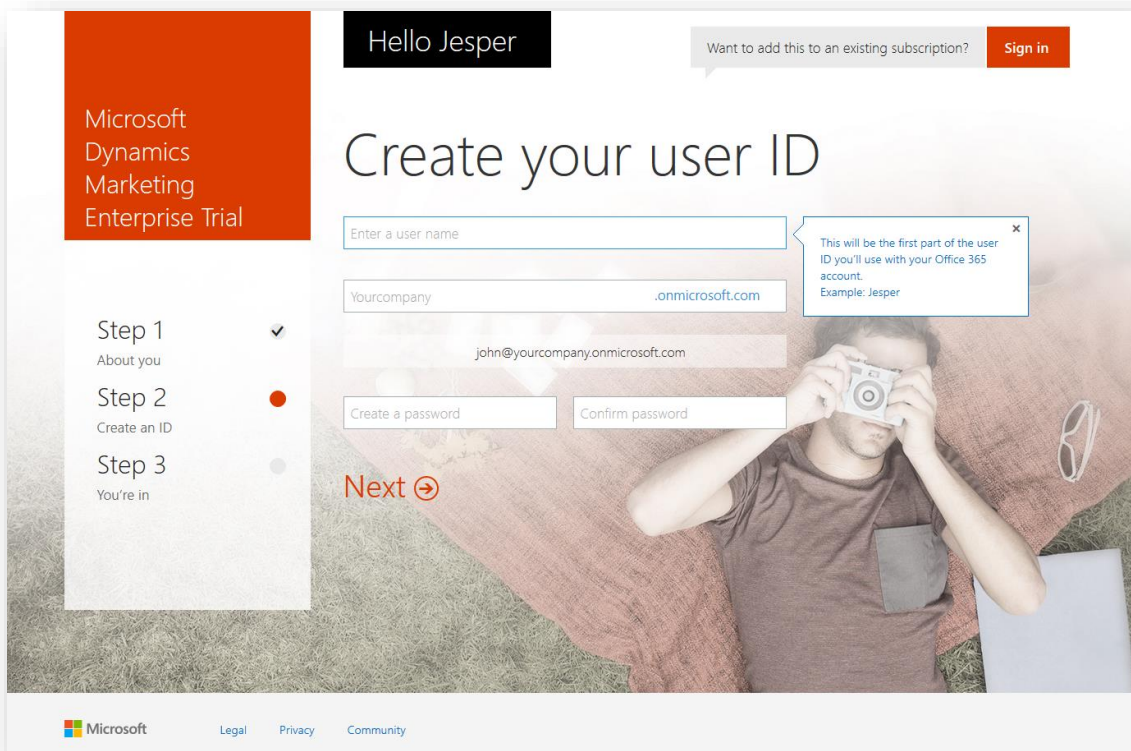
6. Provide your mobile phone for two factor authentication

7. Creating the account

8. We will land you in the Office 365 Admin page – click the menu in the upper left corner
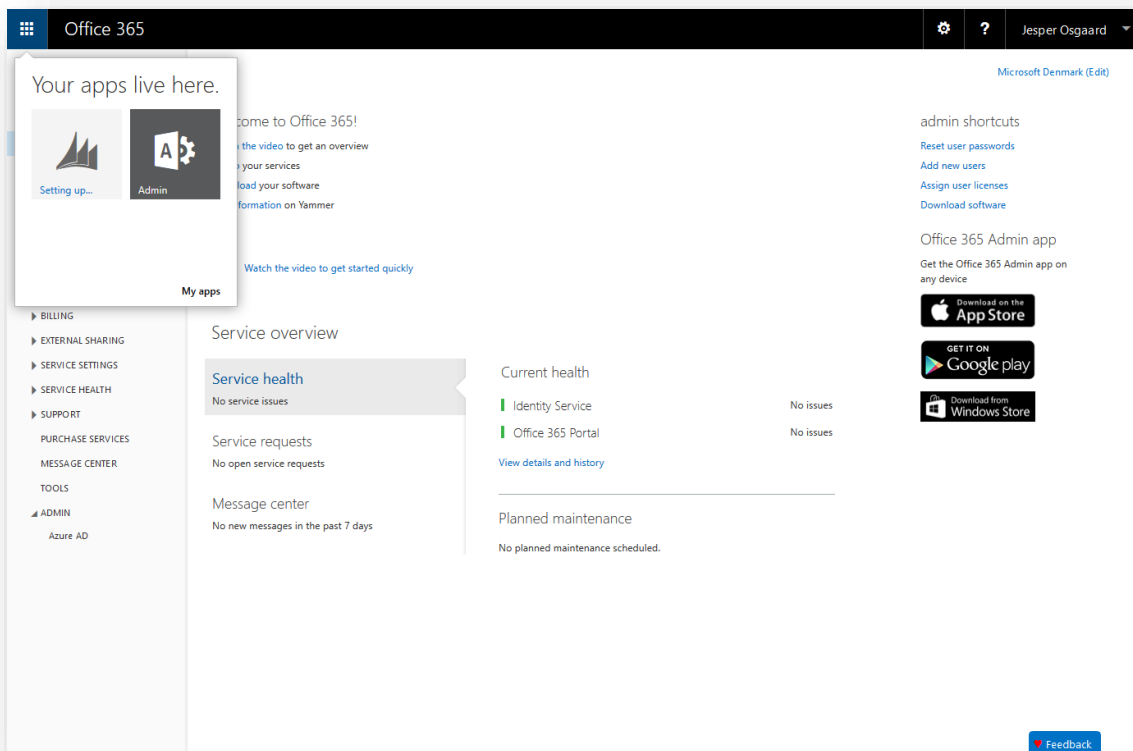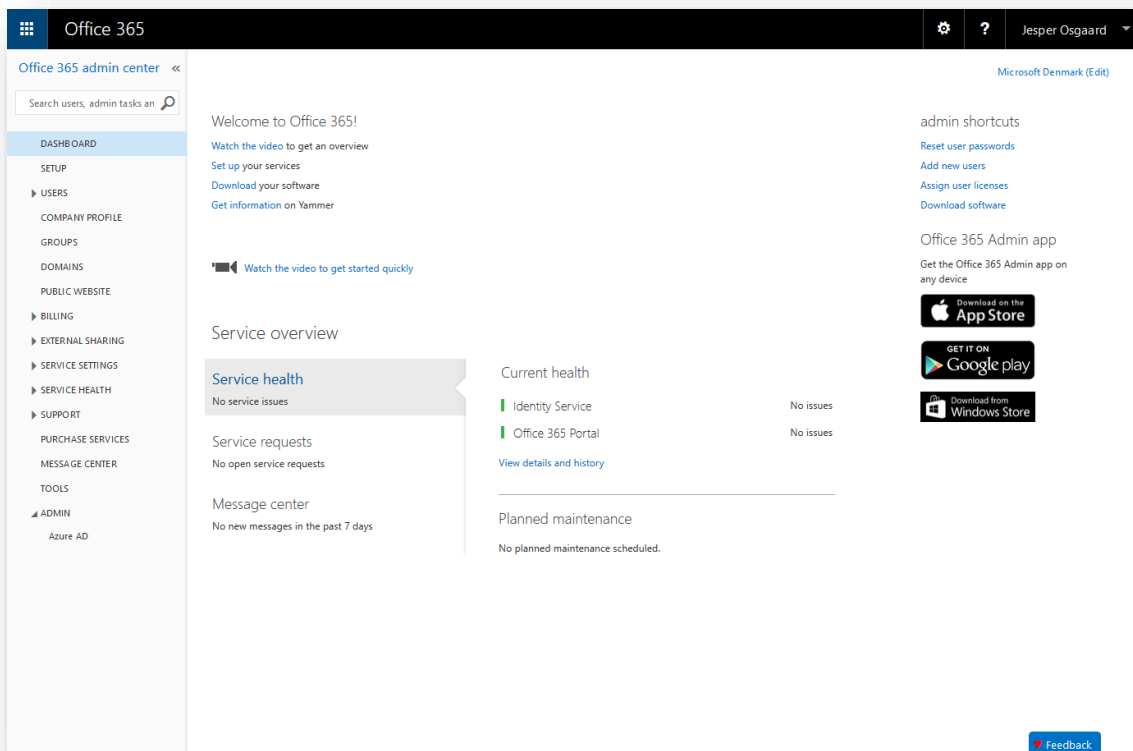
9. A minute or two and Dynamics Marketing is ready
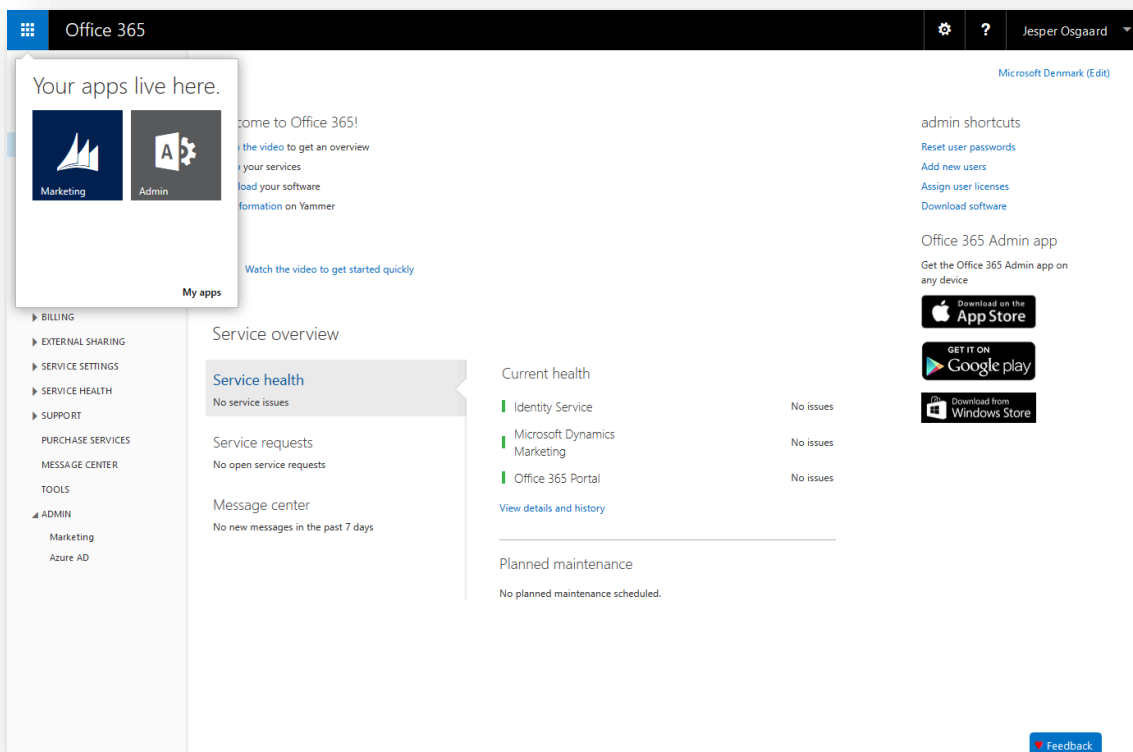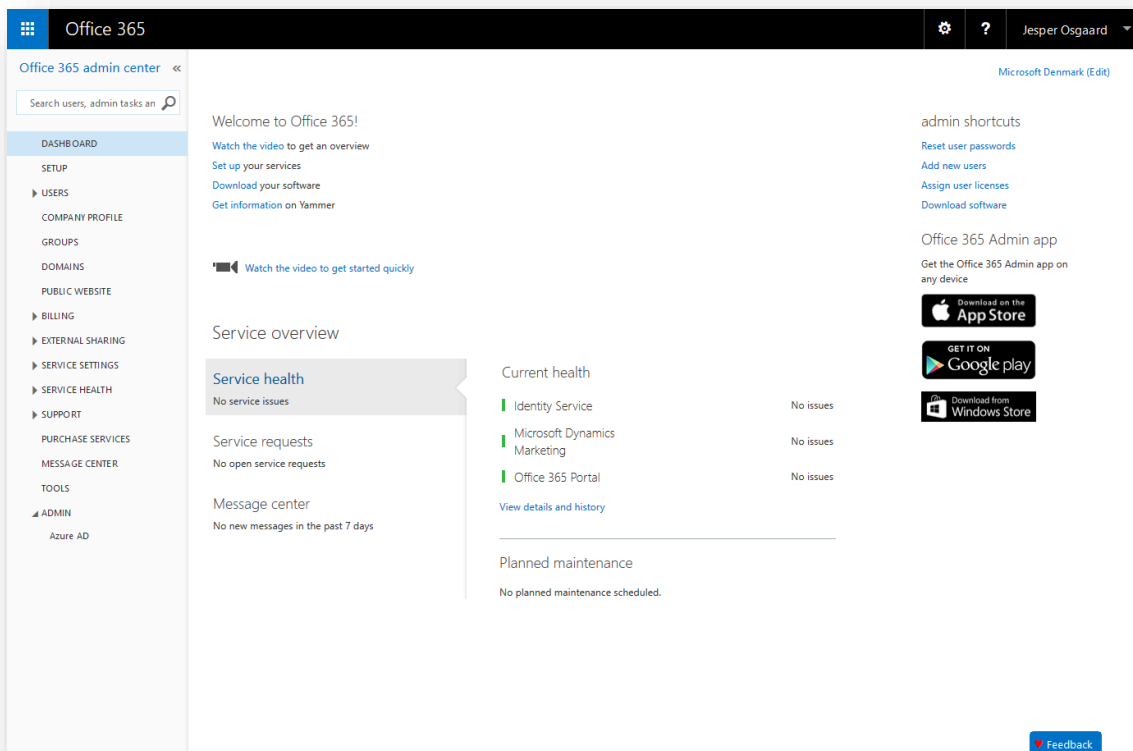
10. First things first – select your currency, accept the license agreement, and click Submit

11. Select what role you want to try – select **All**
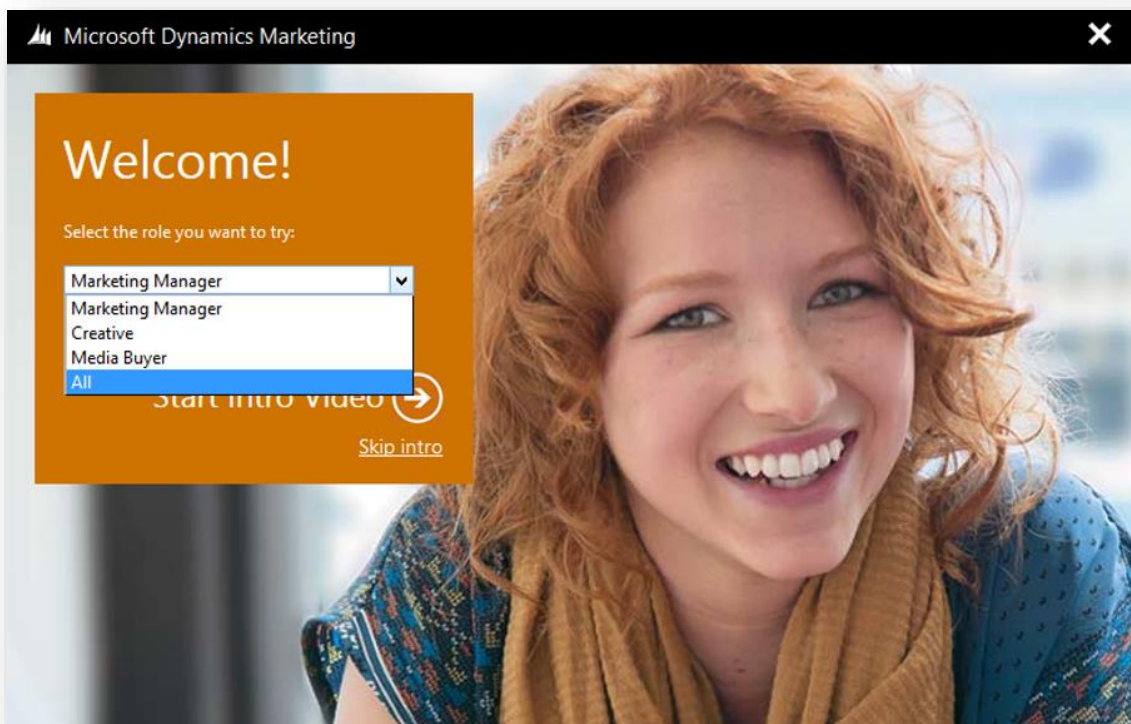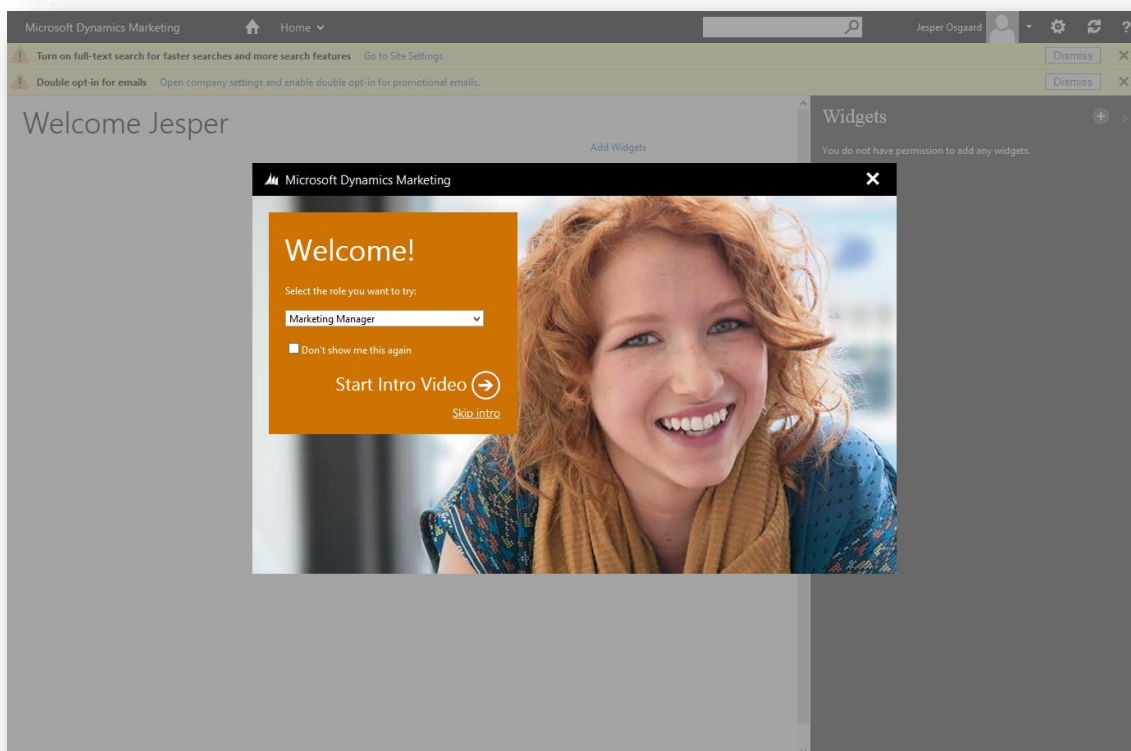
12. Click either "Start intro video" or jump right in by clicking "Skip intro

13. Dismiss the prompts (not important for this trial)
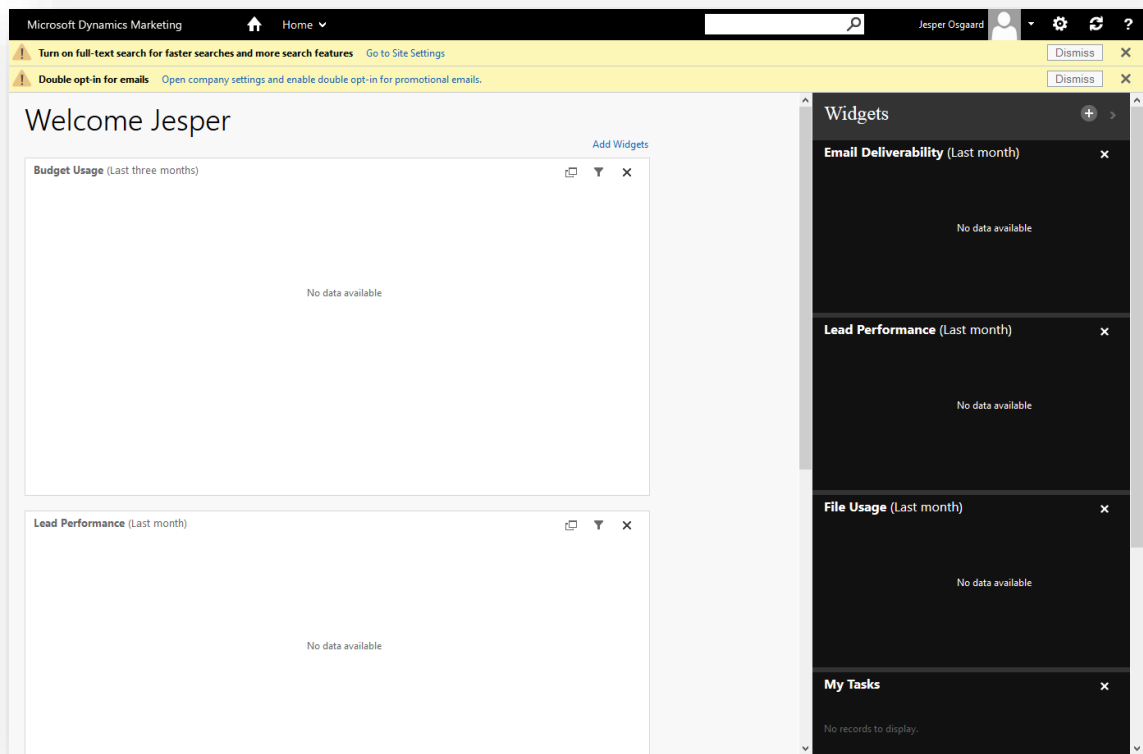
14. You now have a cristine instance of Microsoft Dynamics Marketing (you *can* "Enable sample data for trials" if you prefer so – see https://www.microsoft.com/en-us/dynamics/marketing-customer-center/enable-sample-data-for-trials.aspx for more)
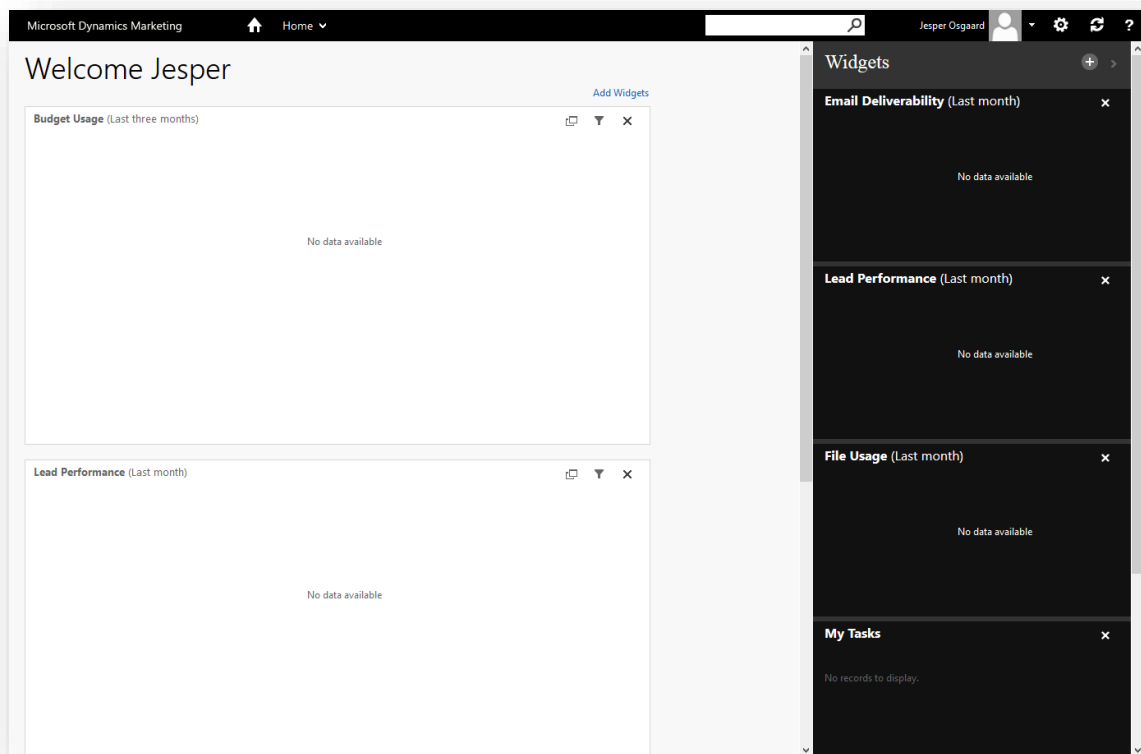
Note

For information on how to navigate the application please see "Appendix A:
Learn how to work and get around in Microsoft Dynamics Marketing", page 126.

Digging In

Having setup your trial, you are now ready to try a few walktroughs to explore some of the features of Microsoft Dynamics Marketing, going from basic to advanced features.

Walkthrough 1: Create marketing contacts and lists

Microsoft Dynamics Marketing provides a marketing database where you can store contact details for all of the people and companies that will be the recipients of your marketing communications. Once they're in your database, you can collect these records into static and dynamic lists that you can use for targeting email marketing messages, automated campaigns, direct mailings, telephone campaigns, event invitations and more. As you engage with your contacts, and as they engage with your automated campaigns, Dynamics Marketing will collect both manually entered and auto-generated records, and associate these with each contact. You can then use this information to gauge interest and link contacts to leads and opportunities, so salespeople can follow up with them.

In this walkthrough, you'll explore this fundamental feature of Dynamics Marketing while also reviewing the basics of how to get around in the system. You'll also generate sample data for use in later walkthroughs.

Step 1: Create a fictional client company

Dynamics Marketing supports both in-house marketing and marketing agencies. For in-house marketing, all marketing initiatives will be associated with the company that has licensed the Dynamics Marketing instance; while at an agency, the agency company owns the Dynamics Marketing instance and uses it to support marketing activities on behalf of their clients. In this walkthrough, the term *site company* refers to the company that owns the Dynamics Marketing instance and the term *client company* refers to a customer of a marketing agency. For in-house marketing, there might be no clients at all, just the site company. For some, especially large, organizational structures, administrators might choose to set up global marketing as the site company and assign individual chain stores, dealerships, or franchises as clients. Alternatively, these may be set up as divisions of the site company, depending on your organization's financial and management structure.

To support this range of scenarios, Dynamics Marketing enforces a *belongs to* concept throughout the application, which assigns various types of marketing entities (such as marketing contacts, leads, jobs, campaigns, marketing emails, and marketing lists) to a specific client or site company. Entities that have a "belongs to" assignment will only be available for use with other entities that also belong to that same client or site company. This ensures confidentiality, fairness, and good business practices because it ensures that expensive and jealously guarded intellectual properties, including contacts and leads, are reserved for those organizations that own them.
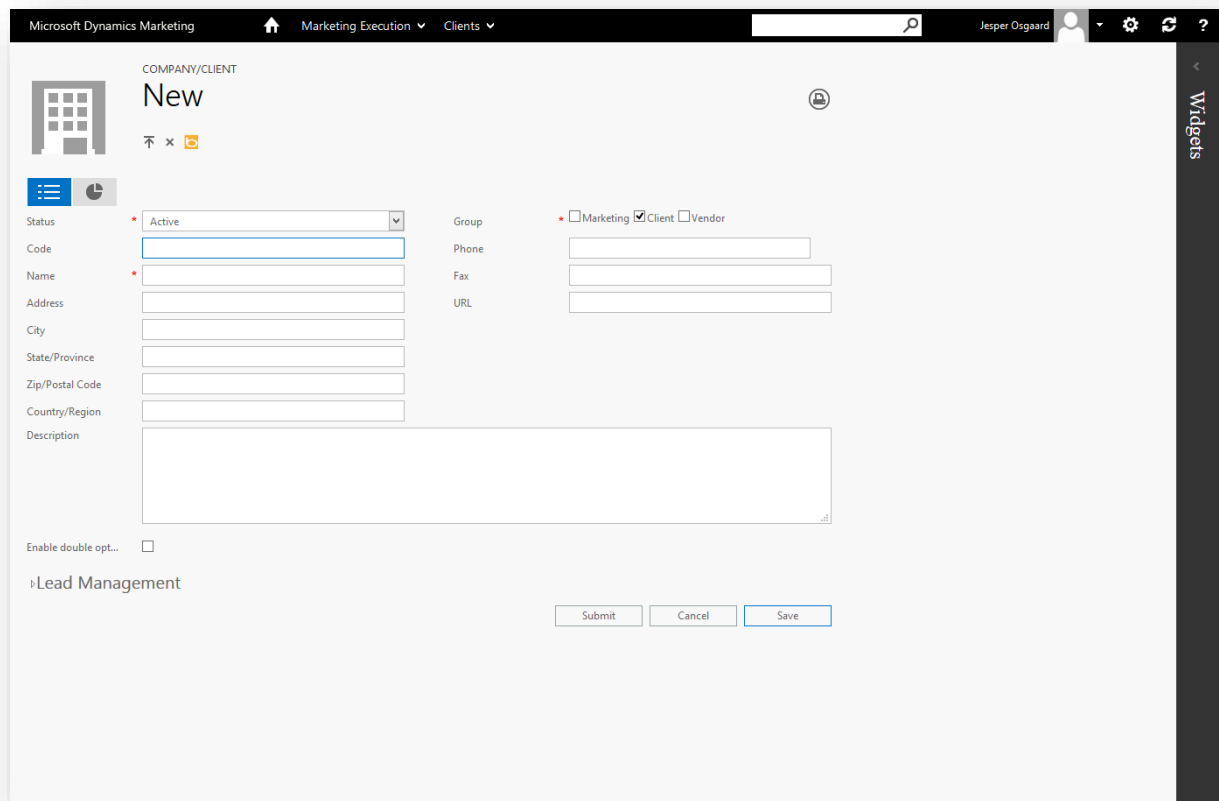
Regardless of the situation at your organization, you'll create a fictional client company for this walkthrough, and will continue to use this company for the other walkthroughs included in the online help. This will let you create marketing entities and initiatives for this fictional client without disrupting any site-wide policies that may already be planned or in place at your organization. All of the elements created in this walkthrough will be configured as belonging to this fictional client.

Create a fictional client company:

1. Go to **Marketing Execution** > **Clients** > **Client Companies**.
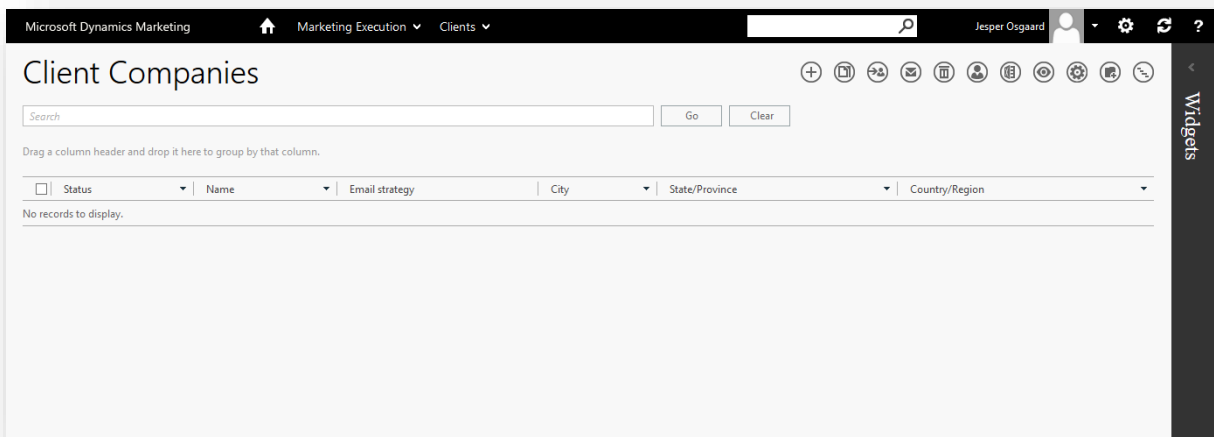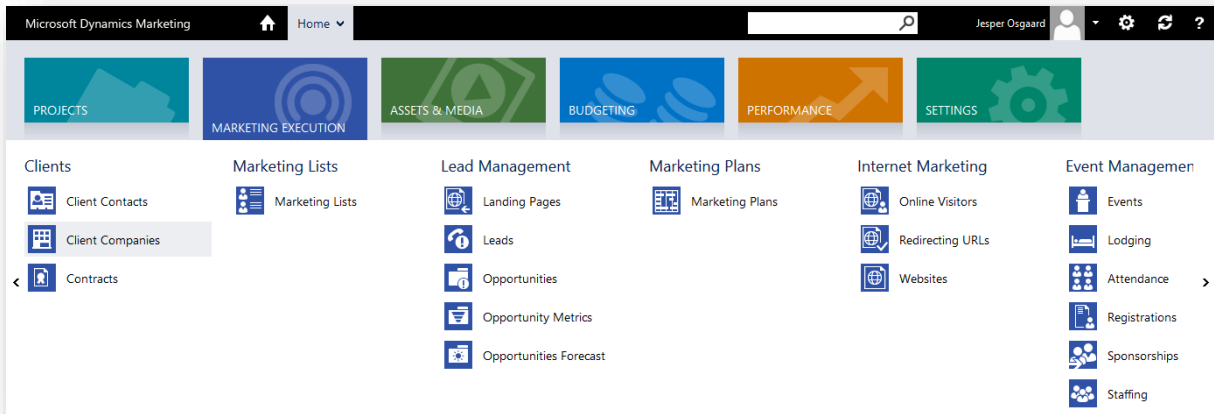
2. Choose the **New** button ⊕ from the **Client Companies** list-page toolbar to open the **New Client Company** page.

3. Enter a **Name** for the new client company. Choose a distinctive name that will make this company easy to recognize later, for example, "WalkthroughClient". For this trial guide I'll name my fictional company "Pop Up

Art"

Tip

Consider naming your client company after your favorite series of movies, books or TV shows; you could then use this as a theme to liven up the other fictional data you'll be entering during the various walkthroughs. Either way, make note of this client-company name because you need to associate it with each of the other elements that you'll create during this and other walkthroughs.

Choose **Save** to save your new client. The page refreshes to include related-information tabs below a dotted line near the bottom of the page. Use the drop-down list just below the dotted line to choose which related-

information tab to show. This user-interface mechanism is common throughout Dynamics Marketing.

4. Choose the **Details** related-information tab from the drop-down list below the dotted line.

5. Check the **Email strategy** setting at the bottom of the **Details** tab. Make sure it is set to "Send one email per contact." This means that if more than one contact shares the same email address, Dynamics Marketing will send a copy of a given marketing email to each of these contacts. As a result, more than one mail may be sent to the same address.

6. Click **Submit** to save and close

Tip

Many organizations prefer to filter outgoing mails to ensure that only one mail is sent to each address, even if that address is shared by more than one contact (this is the way it will work if you choose the "Send one email per email ID" option here). However, for this walkthrough, you'll be creating several different contacts that all use your same email address. This is convenient because you'll be able to see the mails arrive in your own inbox and interact with each mail in a different way to see how Dynamics Marketing records and scores various types of interactions.

For more information about the other settings in the "Client – Company" dialog, see the online help topic Company settings and configuration.

Step 2: Create a set of marketing contacts that belong to the new client

There are four types of contacts in Dynamics Marketing: *marketing*, *vendors*, *clients* and *staff*.

Of these, only marketing contacts have (and must have) a belongs-to company. Marketing contacts are people you target your campaigns and other marketing initiatives to. Each marketing contact can be associated with a marketing company, such as their employer), but this isn't required.

Tip
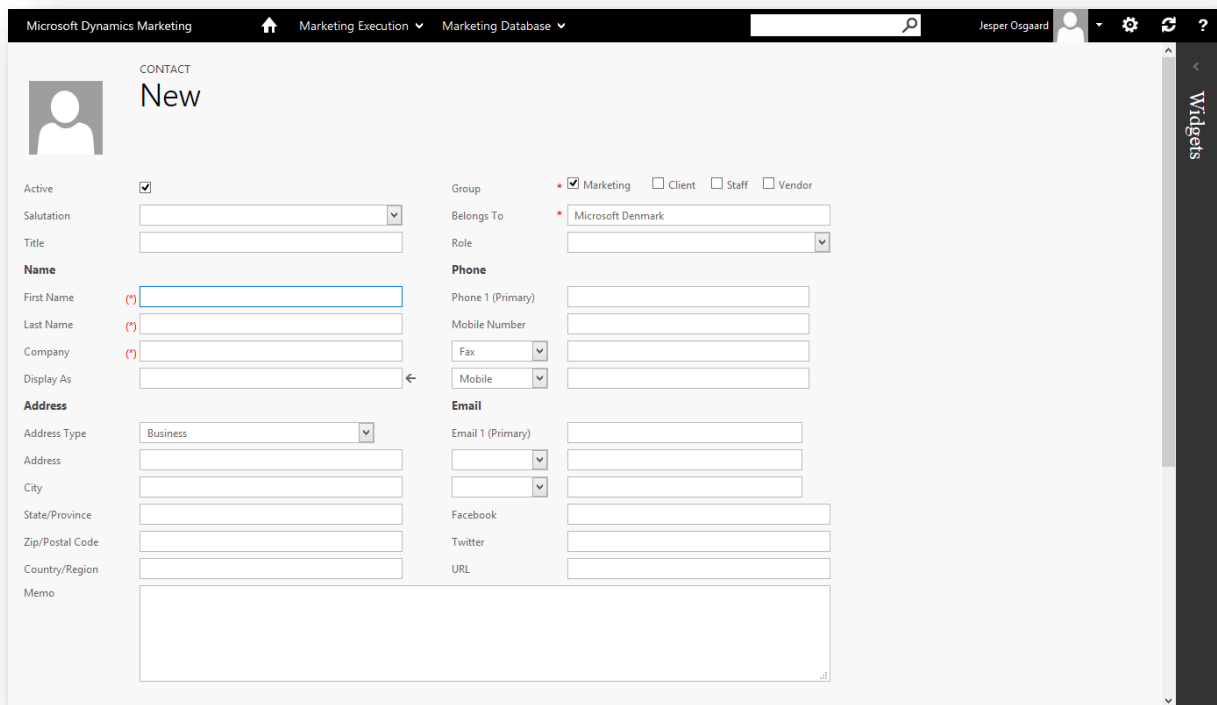
Marketing companies, like marketing contacts, are prospective customers for a marketing campaign. They represent accounts for B2B marketing and, like marketing contacts, must have a belongs-to company. Also like marketing contacts, marketing companies can be associated with leads and opportunities. For these walkthrough exercises, you'll treat all of our marketing contacts as individuals, so you can ignore the marketing companies for now.

In this trial we will create five marketing contacts, each with an email address and account that you can read and each belonging to the fictional client that you just created:

1. Go to **Marketing Execution** > **Marketing Database** > **Marketing Contacts**. This brings you to the **Marketing Contacts** list page.
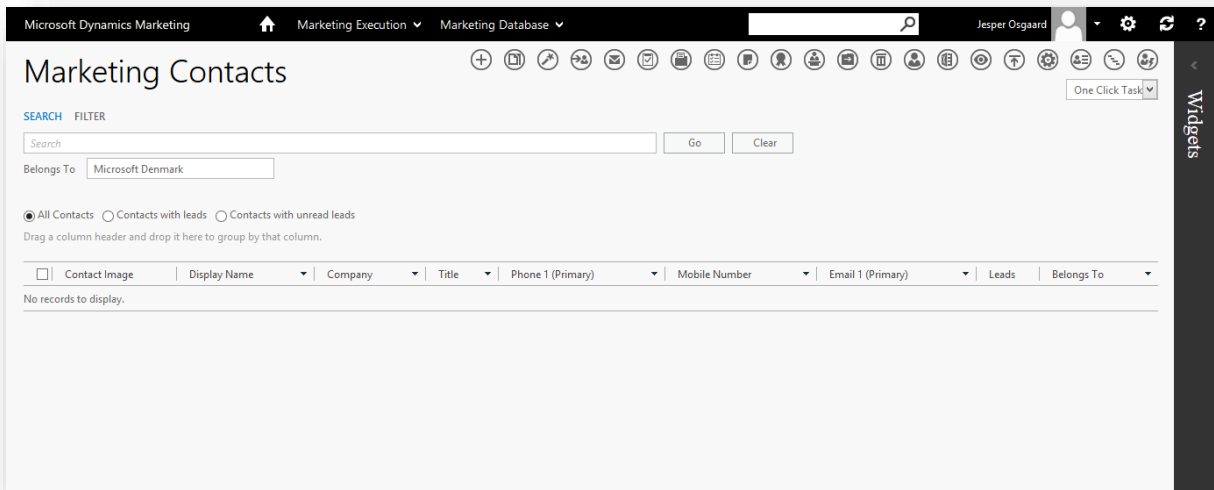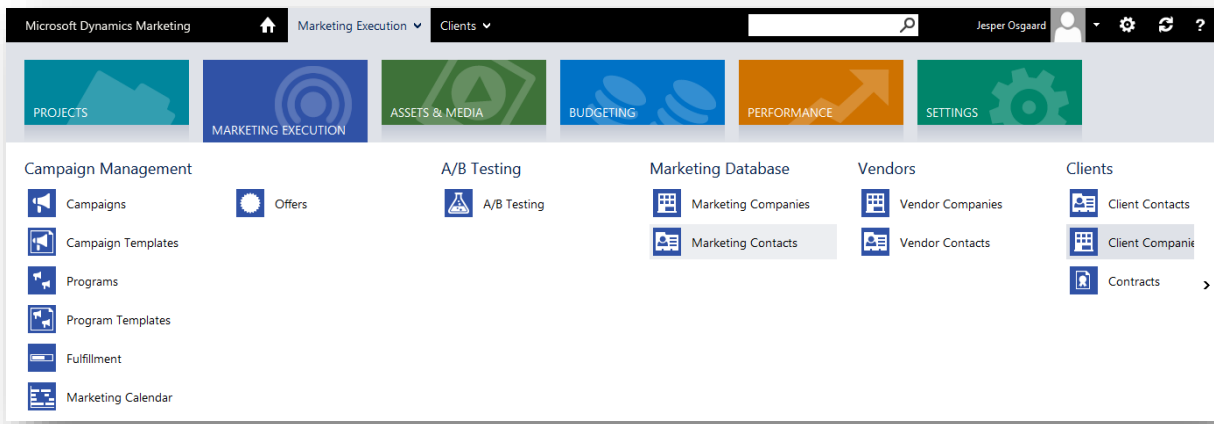
2. Choose the **New** button ⊕ in the toolbar. The **New Contact** maintenance page opens.

3. Make the following settings:

   o **Group**: Make sure that only the **Marketing** box is selected (it should be by default).

   o **Belongs to**: Enter the name of the fictional client company that you just created. This is a type-ahead field, so after you type the first few letters of the name, you'll be able to select the company name from a drop-down list (or enter "%%" as a wildcard to choose from a list of all available companies.)

   o **First Name** and **Last Name**: Enter any names that you like. Try to pick a name that gives some kind of meaning to you so you will recognize it later, for example, by following a theme, as mentioned previously for the client company.

   o **City**: Enter any city name, for example, New York or Paris.

   o **Email 1 (Primary)**: Enter a valid email address with an inbox that you can read, for example, your own address. Usually, any number of contacts can share the same email address; you'll reuse this address for all of the contacts and emails you create during this and other walkthroughs.

For more information about the settings here, see the online help topic Manage contacts.

4. Choose **Submit** to save your new contact and close the page.

5. Repeat this procedure four more times to create five contacts in all. When it comes to the City, let three contacts come from city 1 and two from city 2, for example, three from New York and two from Chicago). Be sure to set the **Email 1 (Primary)** address for all five contacts to an email address that you can read (they can all be the same if needed). Make a note of the name of each contact that you create; you'll need these later.
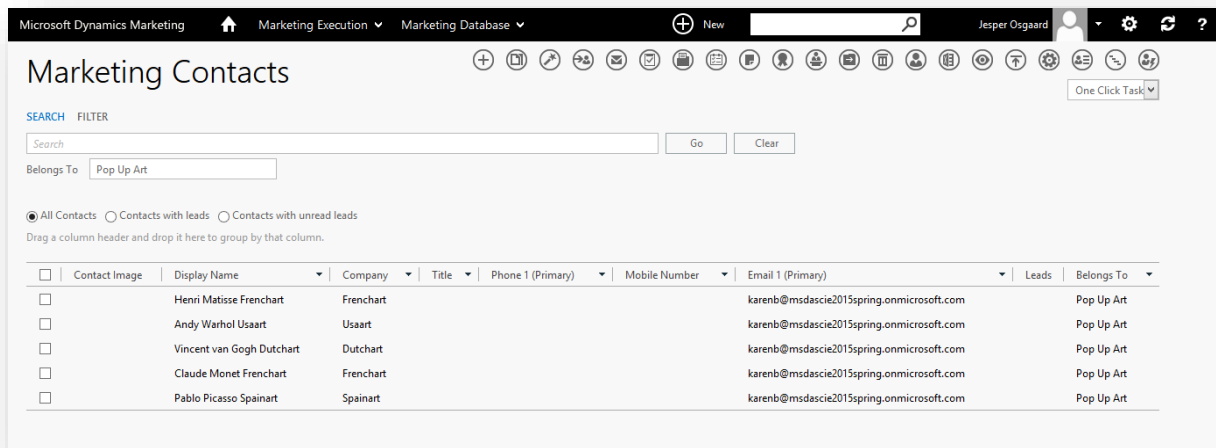
Important

By default, the Dynamics Marketing database will accept multiple contacts that share the same email address, but it is possible to configure the system to prevent this as part of its duplicate-detection algorithm. If your system is configured to disallow shared email addresses, then you will be prevented from saving a new contact with an existing email address (as suggested here). If this is true for you, then instead use or set up several different email accounts that you can read. For details about how to configure the duplicate detection option in Dynamics Marketing, see the online help topic Configure site settings.

Step 3: Create a static marketing list

Marketing lists enable you to collect contacts into a group and then to target the group with marketing emails and automated campaigns. You will typically establish a marketing list for each segment in your marketing strategy. There are two types of lists: *static* and *dynamic*. Static lists are maintained manually, so they can contain an arbitrary collection of marketing contacts (though all members must belong to the same client as the list itself). Marketing contacts can even be allowed to join and leave static lists themselves via the Dynamics Marketing subscription-center feature; use this, for example, to enable contacts to opt-in to various mailing lists. We will return to the concept of dynamic lists in the next step.

Create a static marketing list:

1. Go to **Marketing Execution** > **Marketing Lists** > **Marketing Lists**. This brings you to the **Lists/Queries** list page. Both static lists (lists) and dynamic lists (queries) are listed here.
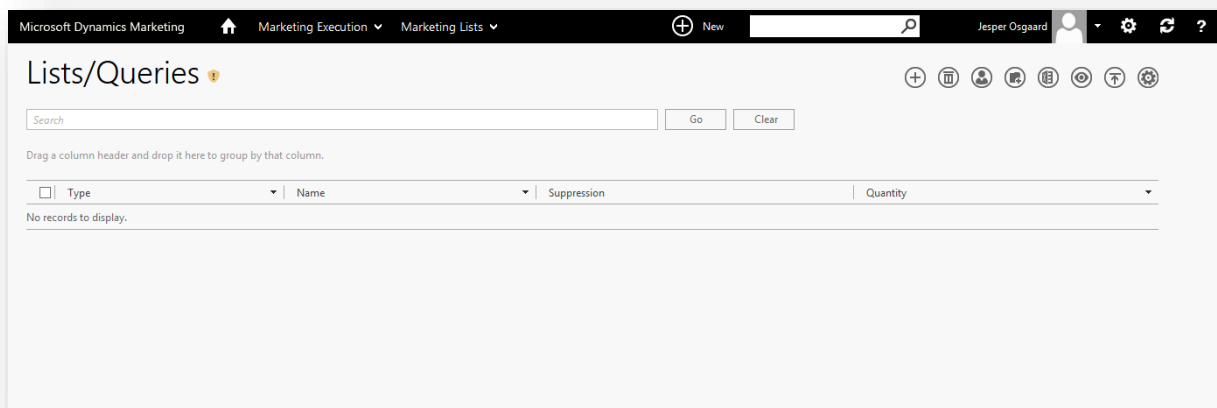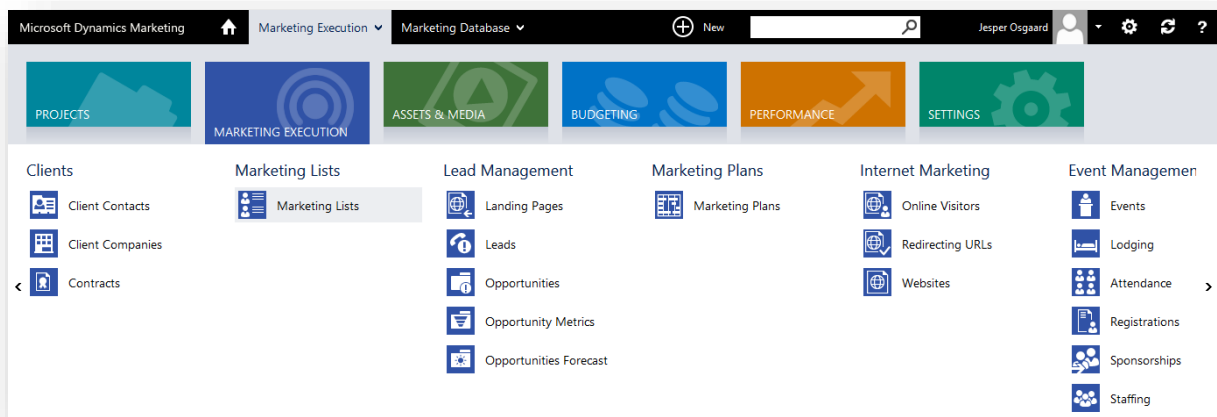
2. Choose the **New** button ⊕ in the toolbar. The Type page opens.
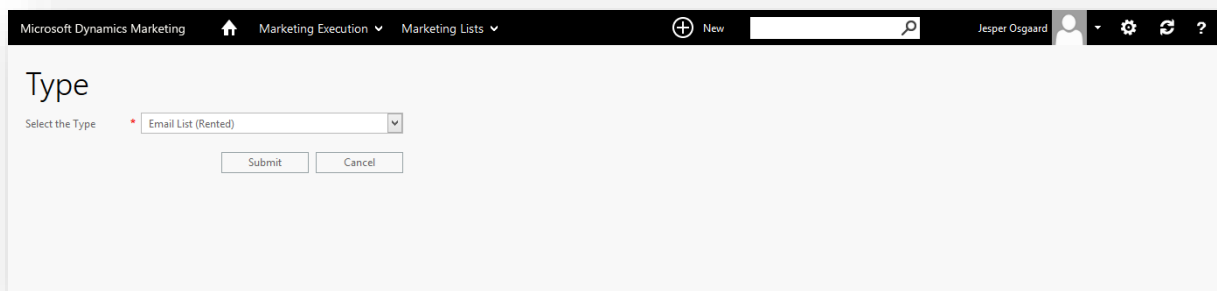
3. Select "List" from the **Select the Type** drop-down list and then click on **Submit** to continue to the **New List** maintenance page.
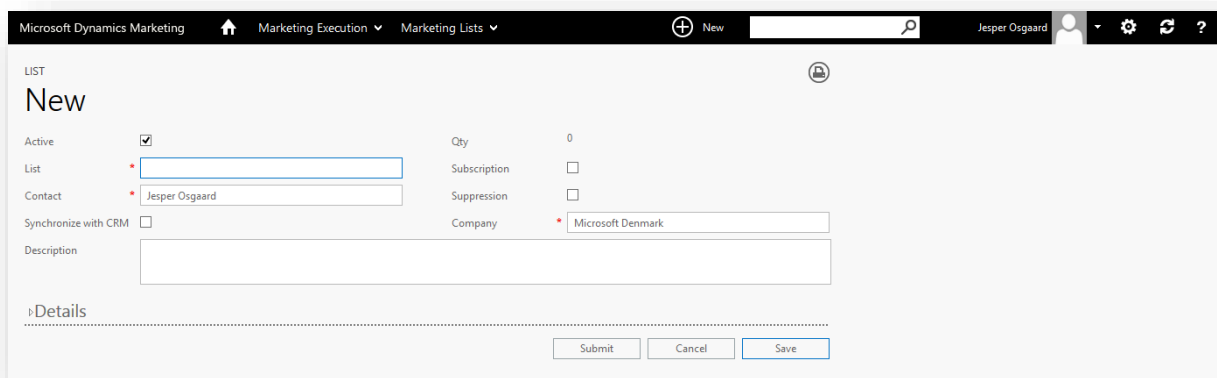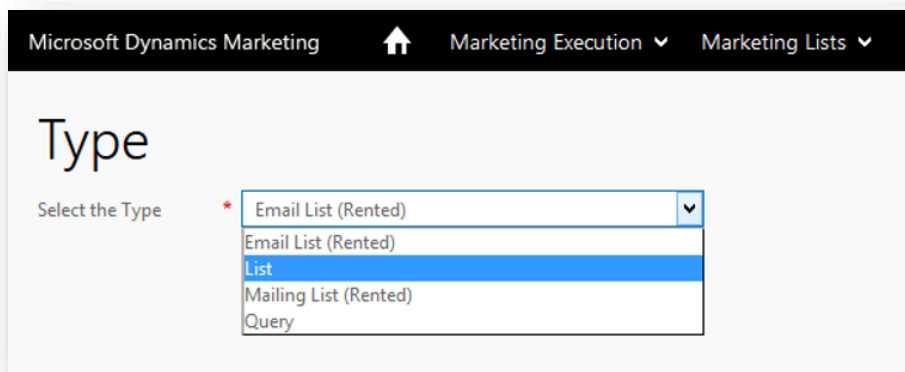
4. Make the following settings:

   o **Active**: Make sure this box is marked. Inactive lists aren't available for use elsewhere in Dynamics Marketing, but you can reactivate them at any time.

   o **List**: Enter a descriptive name for the list that you will easily recognize later, for example, "FamousList".

   o **Contact**: This is the contact who owns the list; by default, this will be you since you are creating it. Just leave your name here. Depending on the security settings your administrator has made, this setting might limit the visibility of the list. For example, it might be available only to you and other people on your team.

   o **Company**: This is equivalent to the "belongs to" setting for marketing contacts; the list will only accept marketing contacts that belong to this same company, and the list can only be used with emails and automated campaigns that also belong to this company. Enter the name of the fictional client company that you created for this walkthrough (type-ahead assistance is provided).

o **Subscription**: Select this check box. This setting will cause the current list to appear on the subscription center, thus enabling marketing contacts to add or remove themselves from the list.
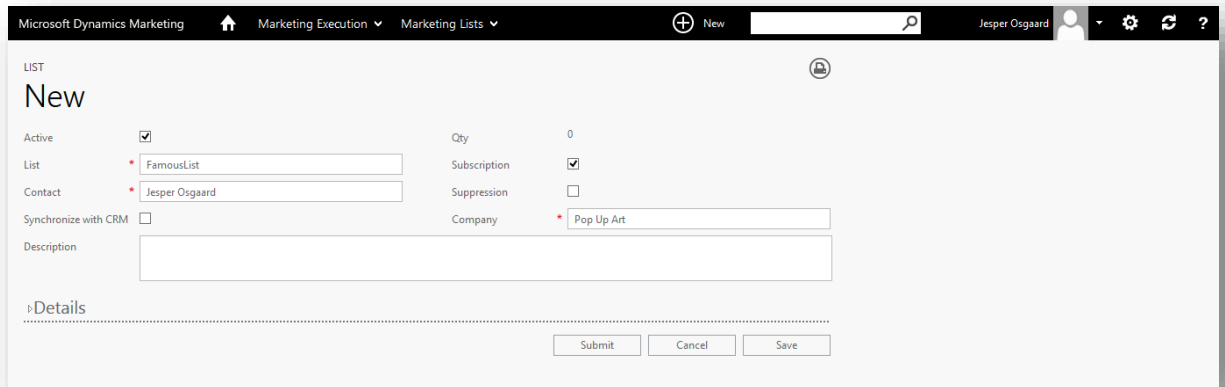
For more information about the settings here, see also List management and segmentation.

5. Choose **Save** to save your new list. The page refreshes to include related-information tabs below a dotted line near the bottom of the page.
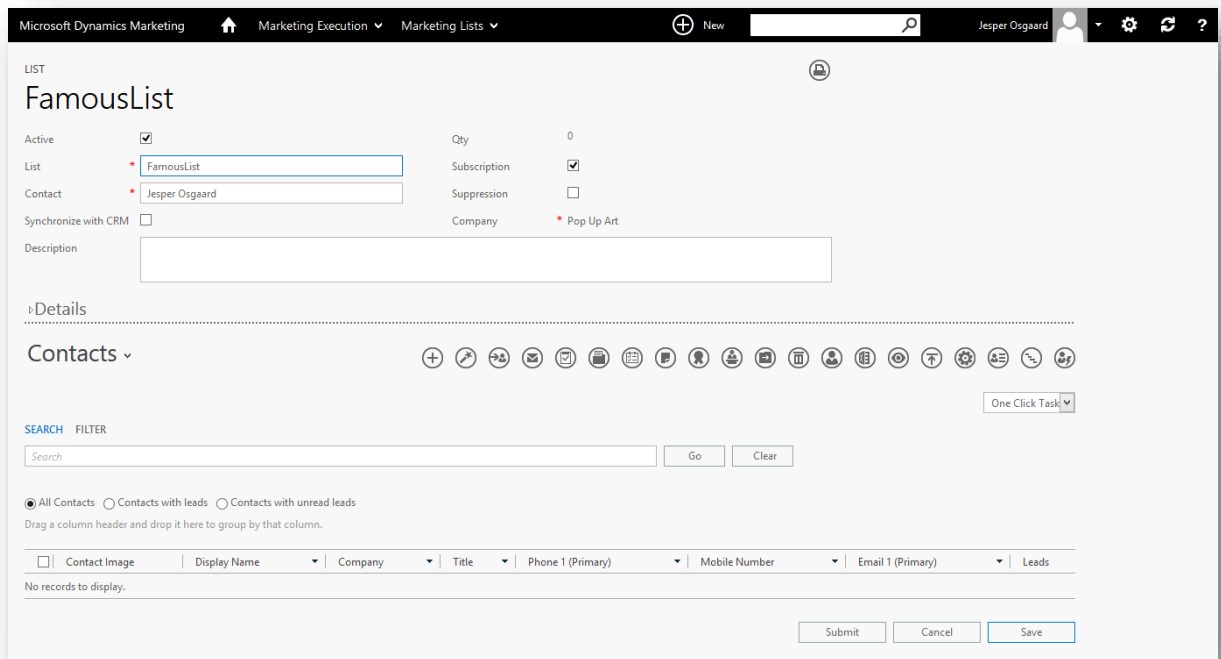
6. If it's not already shown, select the **Contacts** related-information tab from the drop-down list below the dotted line.

7. Choose the **New** button ⊕ in the toolbar at the top of the **Contacts** tab. The **Add Contact** pop-up opens.
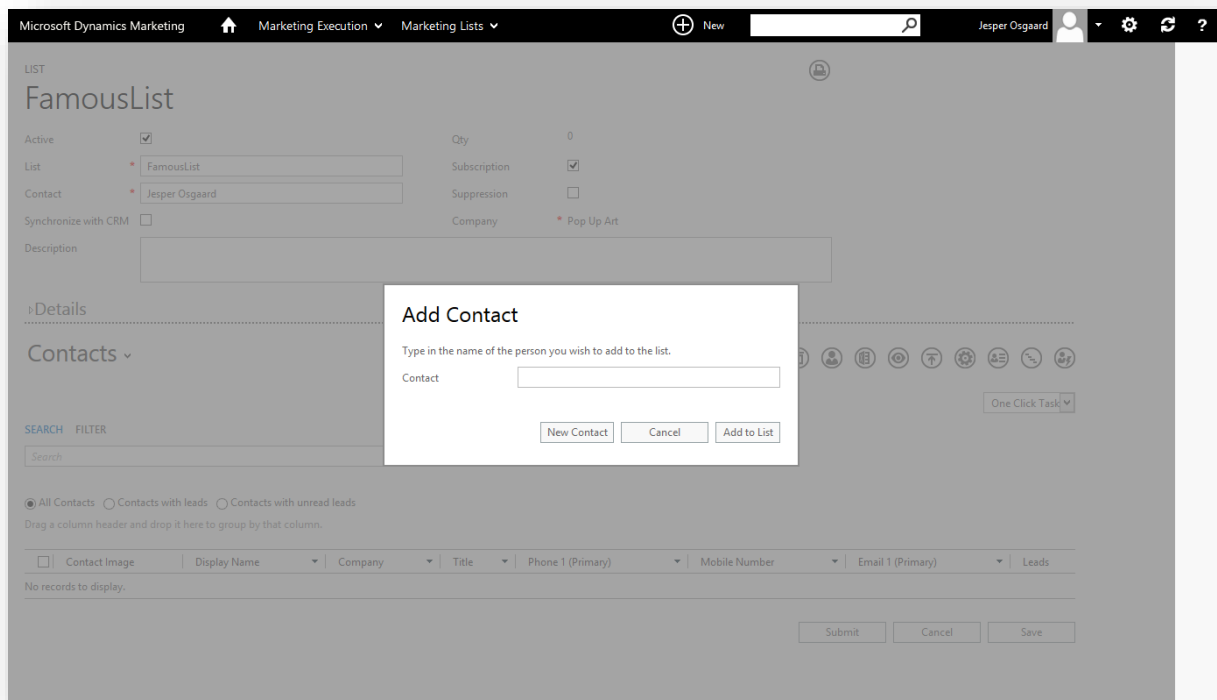
8. Enter the first name of one of the contacts that you just created for this walkthrough. The type-ahead feature quickly provides a list of full names of matching contacts; select the right one and then choose **Add to List**.

Add Contact

Type in the name of the person you wish to add to the list.

Contact

pab

Pablo Picasso Spainart

Microsoft Dynamics Marketing | Marketing Execution ⌄ | Marketing Lists ⌄ | ⊕ New | Jesper Osgaard | ⚙ 🔄 ?

LIST

FamousList

Active	☑		Qty	1
List	* FamousList		Subscription	☑
Contact	* Jesper Osgaard		Suppression	☐
Synchronize with CRM	☐		Company	* Pop Up Art
Description				

▷ Details

Contacts ⌄   ⊕ ✏ 👥 ✉ 📇 🗄 📋 🏳 ⊙ 👤 🗃 🗑 👤 📇 ◉ ⬆ ⚙ 📇 🔗 👥

One Click Task ⌄

SEARCH   FILTER

Search [   ] Go   Clear

◉ All Contacts ○ Contacts with leads ○ Contacts with unread leads

Drag a column header and drop it here to group by that column.

☐	Contact I...	Display Name ▼	Company ▼	Title ▼	Phone 1 (Pri... ▼	Mobile Nu... ▼	Email 1 (Primary) ▼	Leads
☐		Pablo Picasso Sp...	Spainart				karenb@msdascie2015spring.onmicrosoft.c...	

Submit   Cancel   Save

9. Repeat the previous two steps to add any three of your new, fictional contacts to the list.

10. Once you have added three names to the list, choose **Submit** to save your settings and close the page.

Step 4: Create a dynamic marketing list (query)

Queries are dynamic marketing lists whose membership is determined by logical rules rather than individual assignments. Dynamics Marketing provides a wide selection of criteria for defining query membership, including demographic (age, gender, location, income), behavioral (event attendance, email interactions, web visits) and structural (membership in other lists). Queries enable you to create large lists very quickly and to establish logic that matches your marketing segmentation strategy.

Create a query based on contact location:

1. Go to **Marketing Execution** > **Marketing Lists** > **Marketing Lists**.

2. Choose the **New** ⊕ button in the toolbar. The **Type** page opens.

3. Select "Query" from the **Select the Type** drop-down list and then click on **Submit** to continue to the **New Query** maintenance page.
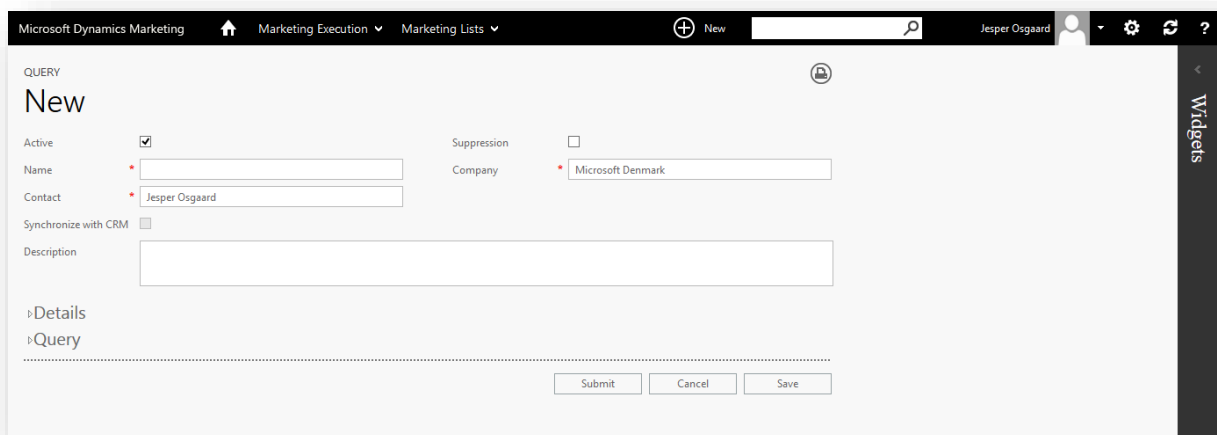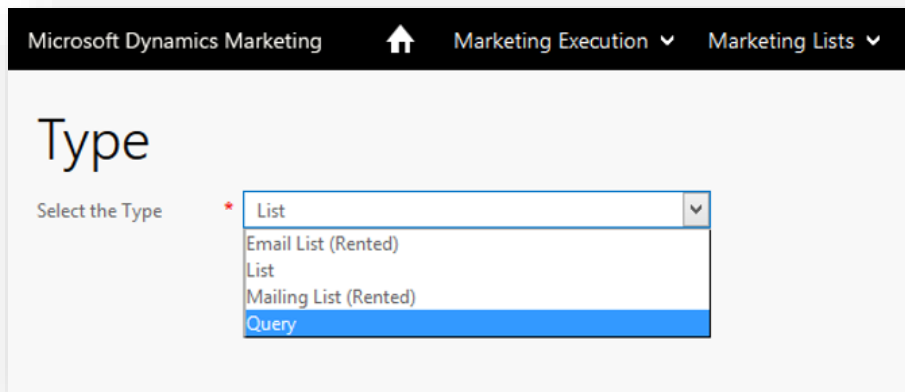
4. Make the following settings:

    o **Active**: Make sure this check box is selected. Inactive lists aren't available for use elsewhere in Dynamics Marketing, but you can reactivate them at any time.

    o **Name**: Enter a descriptive name for the query that you'll easily recognize later, for example, "FamousQueryRoskilde".

    o **Contact**: Just leave your own name, as before.

o **Company**: Enter the name of the fictional client company that you created for this walkthrough (type-ahead assistance is provided).

See also List management and segmentation for more information about the settings here.

5. Expand the **Query** heading if it is not already open. This is where you will establish the membership criteria for the list.

6. From the **How do you wish to query contacts?** drop-down list, choose "Filter on contacts", which means that we will test against the demographic data recorded on each individual contact's maintenance page.
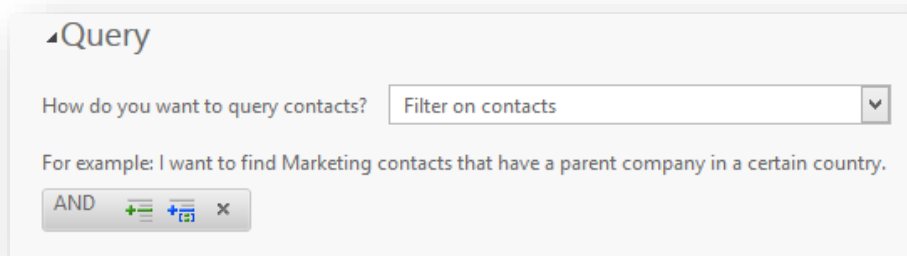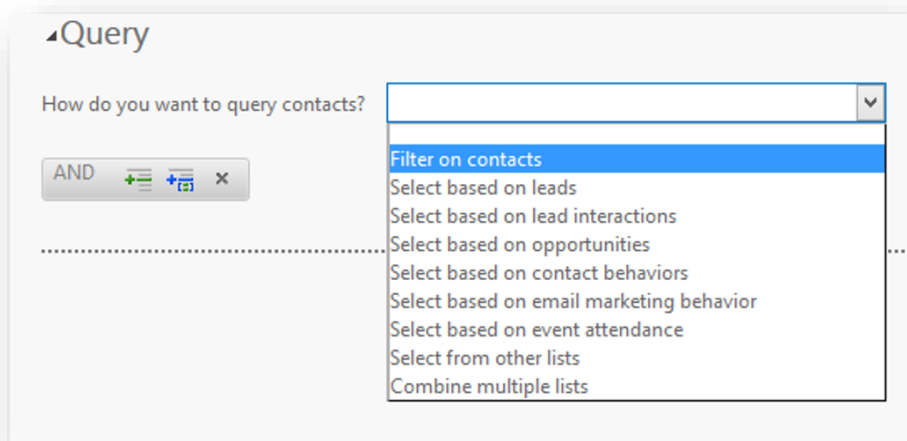
7. Choose the **Add Expression** button from the toolbar in the **Query** area. A new expression is added to the query; use the various drop-downs and fields to set it to: "Contact City | Equal To | Roskilde". (Change the city name as needed, depending on the cities you used for your contacts.) The result should resemble the following image:

8. Choose **Save** to save your query. The page refreshes to include related-information tabs.

9. If it's not already shown, choose the **Contacts** related-information tab. You should now see a list that includes all of the marketing contacts that *belong to* the same **Company** as the current query and who live in the city

that you specified.

10. If you like, spend some time playing with the **Query** controls and use the **Apply** button to see how your settings affect the selection of **Contacts** included in the list. Note that you can create quite complex queries with grouped expressions and a mix of AND, OR, and NOT operators.

11. Click **Submit** to save and close the query (dynamics list) and return to the Lists/Queries page. You now have two marketing lists

Walkthrough 2: Create, send and monitor a marketing email

Marketing emails are commercial messages sent out to a large number of recipients. With Microsoft Dynamics Marketing, you can create email marketing messages, deliver them to all of the contacts from one or more marketing lists, and measure the response.

Microsoft works closely with regulators, ISPs, large email providers, and other interested parties to help ensure that Dynamics Marketing emails will get past spam filters while keeping your organization off email blacklists.

Dynamics Marketing emails are fully CAN-SPAM compliant, which means that they <u>must</u> always include the following:

- An subscribe/unsubscribe link (subscription center)

- The physical address of the sending company

- Plain-text content that is equivalent to the styled (HTML) content

- A valid sender address

- A subject

Step 1: Prerequisites: one client, some contacts, and a list

For this walkthrough, you'll need the following items in your Dynamics Marketing database:

- A fictional client company configured to allow shared email addresses.

- A small collection of fictional marketing contacts that belong to the fictional client company and whose email you're able to read (they can all share your email address).

- A static marketing list that includes two to five marketing contacts (both the list itself and all of its contacts must belong to the same fictional client). Select the **Subscription** check box for the list, which will make the list visible on the subscription center page.

You should already have all of these items if you did the marketing-database walkthrough. See "**Walkthrough 1: Create marketing contacts and lists**", page 11 for instructions.

Step 2: Set up the required plug-ins

Email marketing plug-ins help to automate several important aspects of your marketing emails, including CAN-SPAM compliance and other best practices. Usually you will only create a small number of plug-ins and reuse these with all of your various mailings and campaigns.

Step 2.1: Create a subscription center plug-in

The subscription center is a webpage hosted by Dynamics Marketing that enables contacts to add or remove themselves from various mailing lists.

Each subscription-center plug-in creates the required webpage and provides a managed link to that page to be included with your marketing emails.

Dynamics Marketing won't send marketing emails that don't include a subscription-center plug-in.

1. Go to **Settings** > **Campaign Management** > **Email Marketing Plug-ins**. The **Plug-Ins** list page opens.
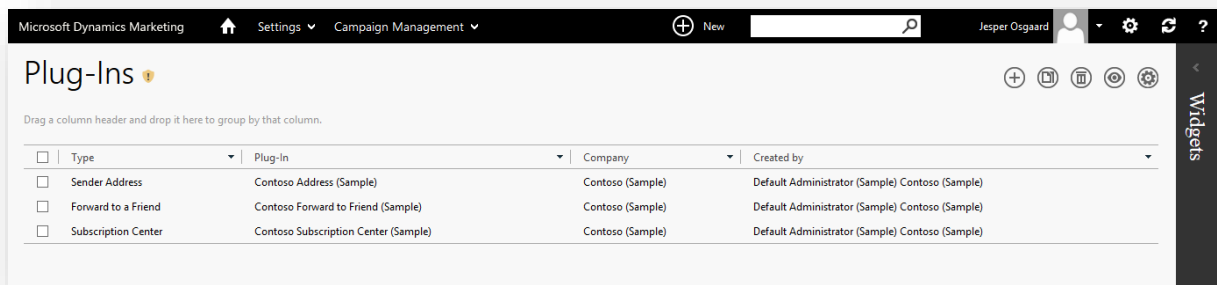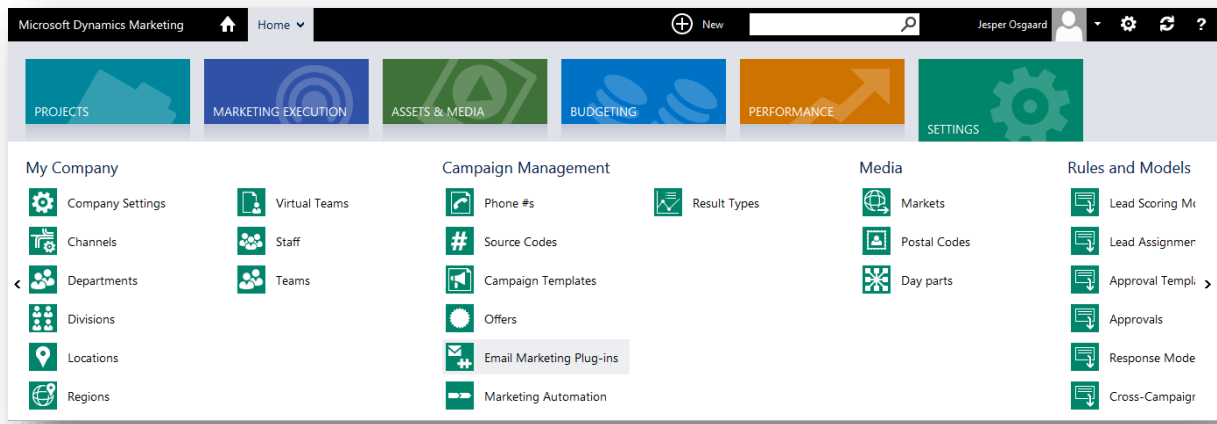
2. Choose the **New** button ⊕ in the toolbar. The **Plug-In Type** pop-up opens.
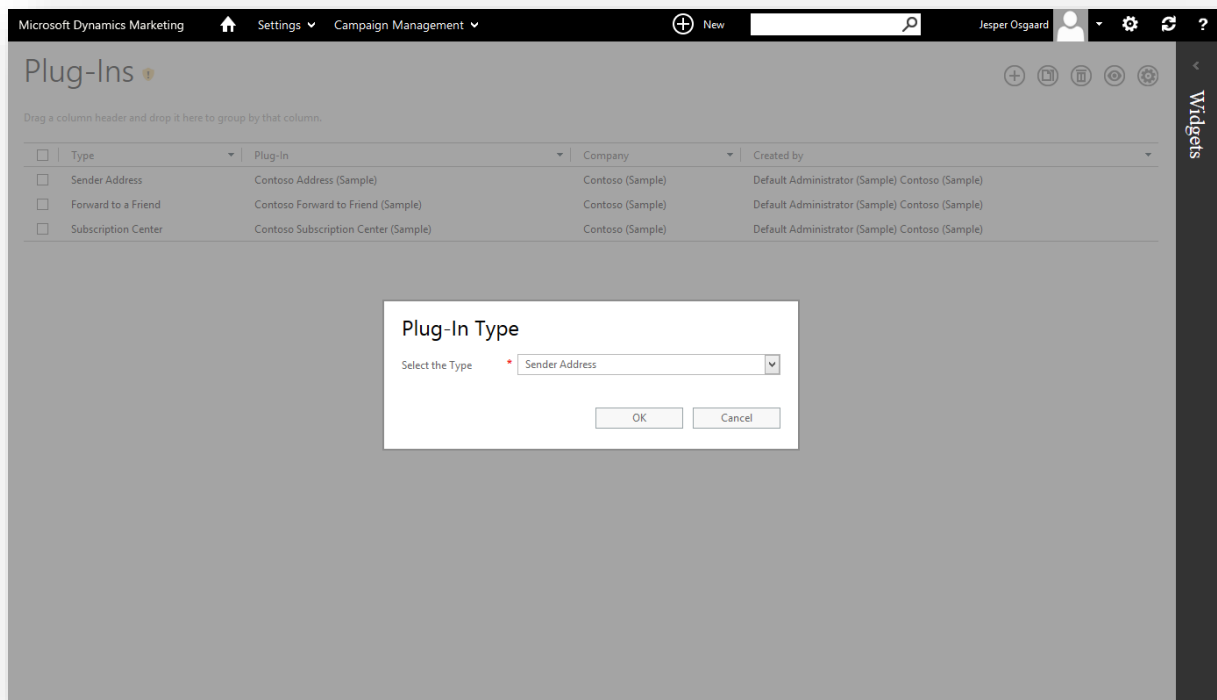
3. Choose "Subscription Center" from the **Select the Type** drop-down list and choose **OK** to continue to the **New Subscription Center** page.
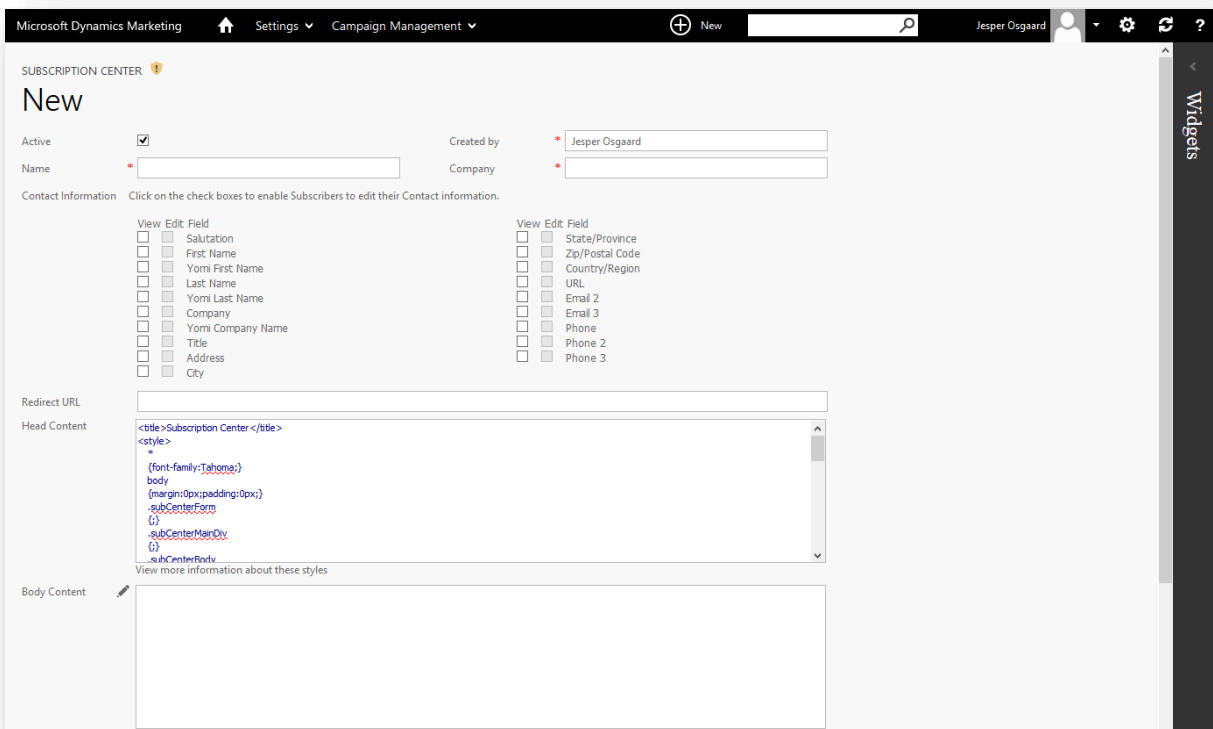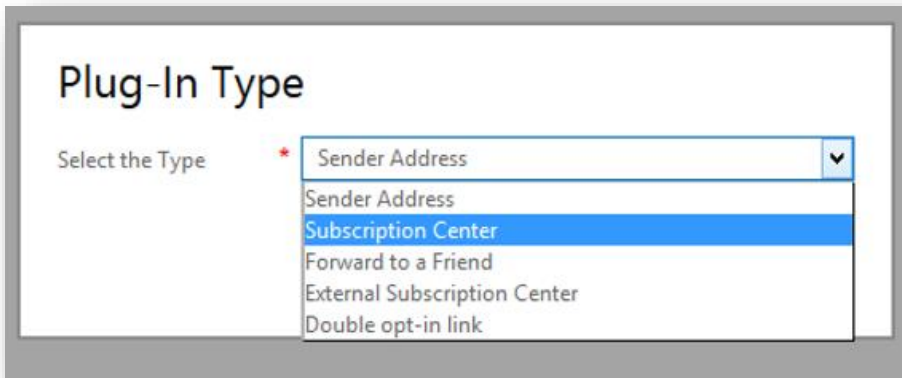
4. At minimum, enter the following:

   o **Name**: Enter a descriptive name for the plug-in that will be easy for you and other users to recognize, for example. "WalkthroughSubCenter".

   o **Company**: Enter the name of the fictional client company mentioned in the prerequisites for this walkthrough. The current plug-in will only be available for use with marketing emails also designed for this same company. The subscription center itself will enable contacts to join or leave lists that are associated

with this company *and* configured as subscription lists.
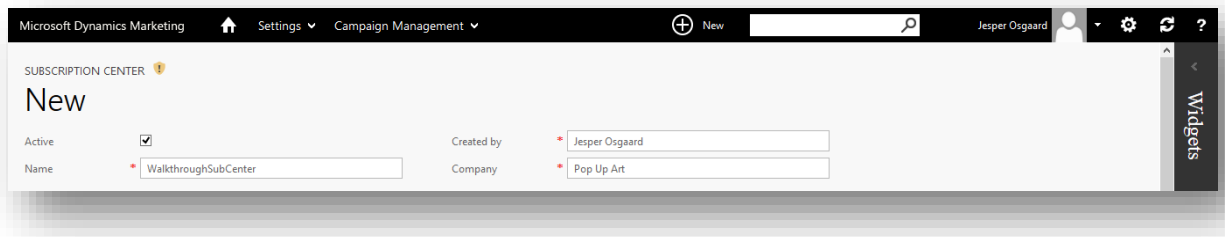
For more information about the other settings on this page, see the online help topic Create a Subscription Center page using a plug-in.

5. Choose **Submit** to save your new plug-in and close the page.
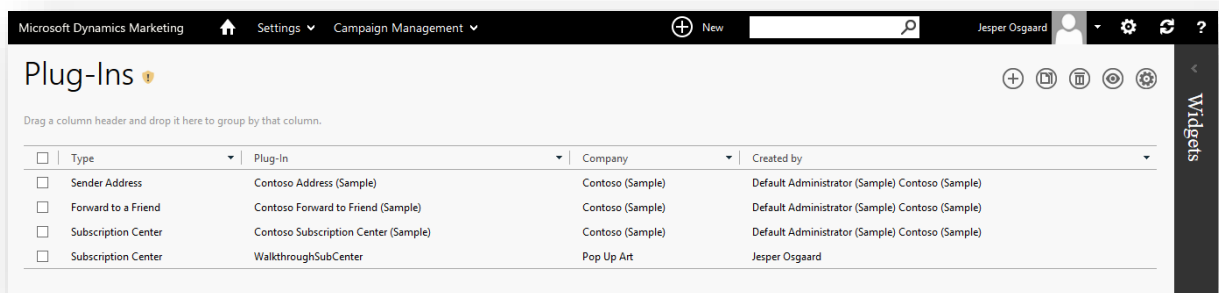
Step 2.2: Create a sender-address plug-in

Anti-spam regulations and systems require that all marketing emails include the physical street address of the sender. Dynamics Marketing won't send marketing emails that don't include a sender-address plug-in. The plug-in will generate both horizontal and vertical layouts based on your specified address; you will be able to choose either layout to include in your email design.

1. If you're not already on the **Plug-Ins** list page, go to **Settings** > **Campaign Management** > **Email Marketing Plug-ins**.

2. Choose the **New** button ⊕ in the toolbar. The **Plug-In Type** pop-up opens.

3. Choose "Sender Address" from the **Select the Type** drop-down list and choose **OK** to continue to the **New Sender Address** page.

4. Enter your physical address using the fields provided.

    o As with the subscription center, choose a descriptive **Name** like
       "WalkthroughSenderAddress" and set the **Company** to your fictional client (the same one you chose for the
       subscription center). Note that many of the address fields may be filled in automatically to match the
       contact record for the **Company** you specify.

o Fill in all required fields (which are marked with a red asterisk).

For more information about the other settings on this page, see the online help topic Sender Address plug-ins.

5. Choose **Save** to see the previews (how the addresses will appear in your mails)

6. Choose **Submit** to save your new plug-in and close the page.

Step 3: Create a simple, valid email template

All marketing emails must include the following elements in order to be sent by Dynamics Marketing:

- A subscription-center plug-in

- A sender-address plug-in

- A subject

- A from address

Now that you have set up all of the plug-ins you'll need, you will create an email template that assembles all of these minimum required elements. Having this template available as a baseline will make it fast and easy to go on to create new, valid email designs (as will be required for the various walkthrough exercises going forward).

Tip

In general, you do not need to create a new template each time you design a marketing email. You could instead create one-off designs that are based on the default, blank-message template, but in this case you would also need to add each of the required plug-ins manually every time. You can also use any existing email message as a de-facto template by creating a copy of it and then editing the copy. However the template that you will create in this step serves as an illustration of the template system and, as mentioned, will also come in handy when working with this and later walkthroughs.

---

1. Go to **Marketing Execution** > **Email Marketing** > **Templates**. The **Email Templates** list page opens.
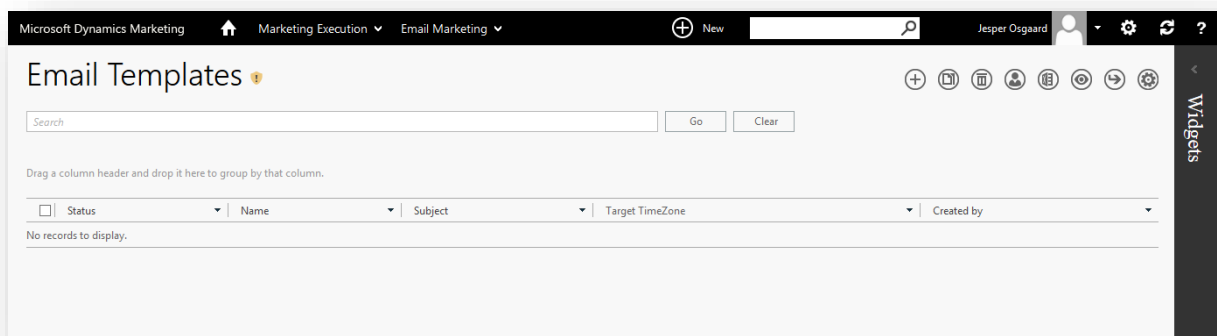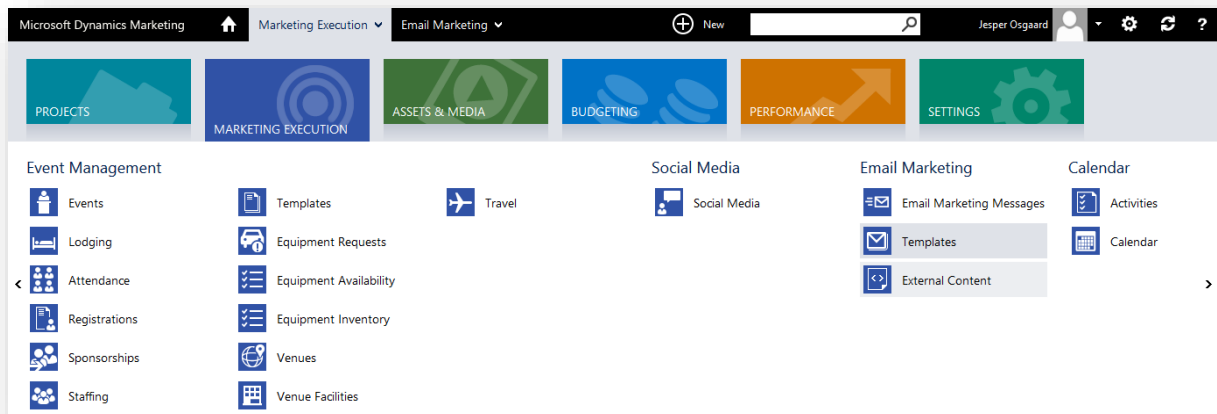
2. Choose the **New** button ⊕ in the toolbar. The **Template** page opens.
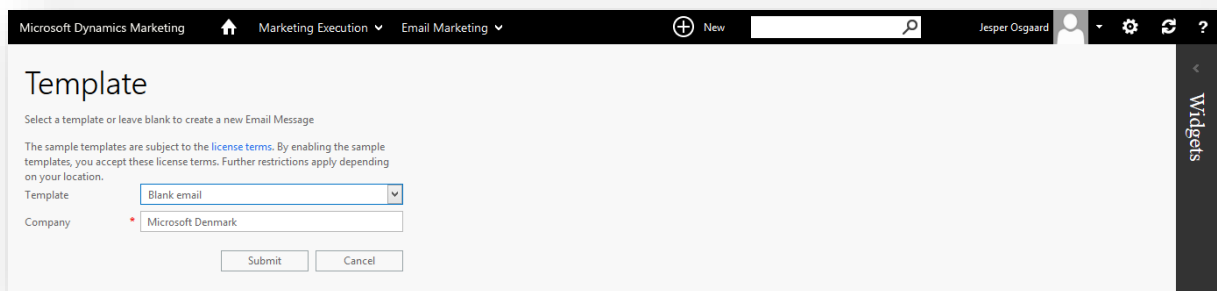
3. Make the following settings:

   o **Template**: Set to "Blank email". This template creates a blank email that uses the graphical, drag-and-drop designer interface.

   o **Company**: Set to the same fictional client that you used for your plug-ins and list.

    o **Send externally**: Leave this box unchecked (if present).

4. Choose **Submit** to go on to the **Email Marketing** maintenance page.

Enter the following values here:

    o **Name**: Enter a descriptive name that you and others will recognize like "WalkthroughTemplate".

    o **Designation**: Set to **Commercial**.

o **Subscription Center**: Select the plug-in that you created previously.

For more information about the other settings on this page, see the online help topic Create or view email marketing messages.

5. Choose **Save** to save your settings while remaining on the **Email Marketing** maintenance page.

6. Choose the **Edit Content** top-level tab icon located near the top of the page. This brings you to the graphical email designer.
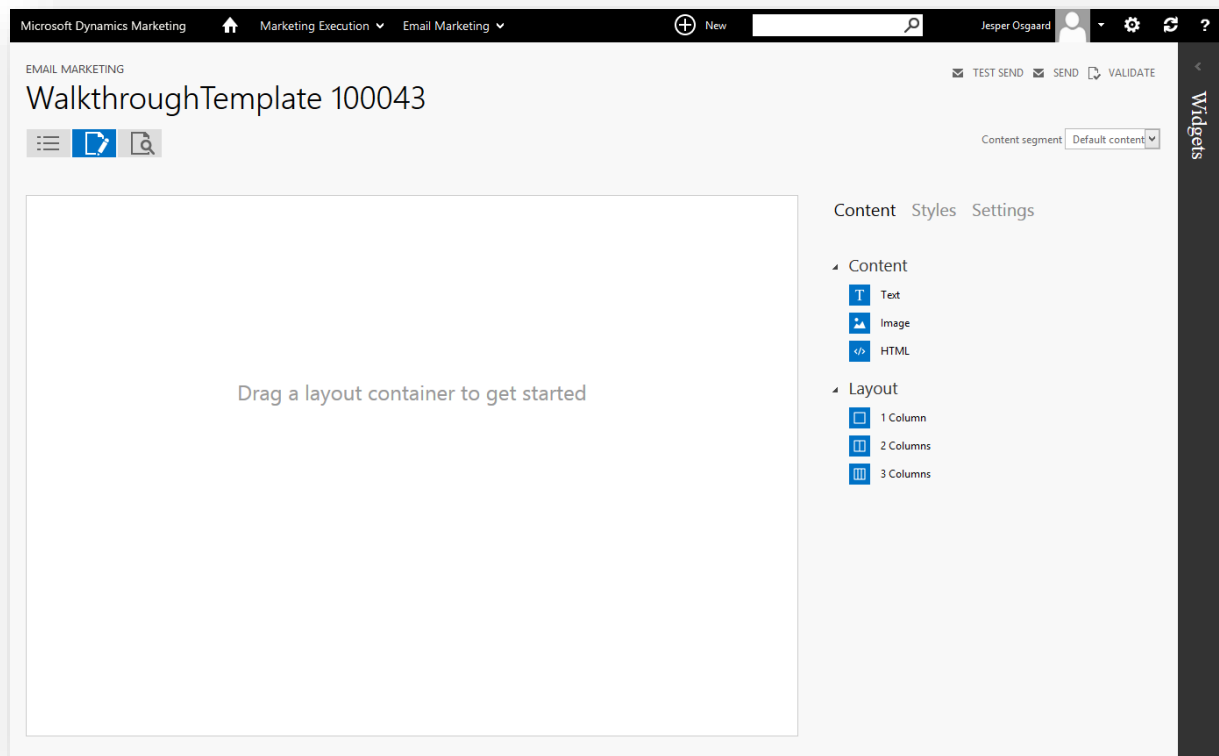
7. Drag a **1 Column** block ⬜ from the **Content** area (on the right) onto the canvas.
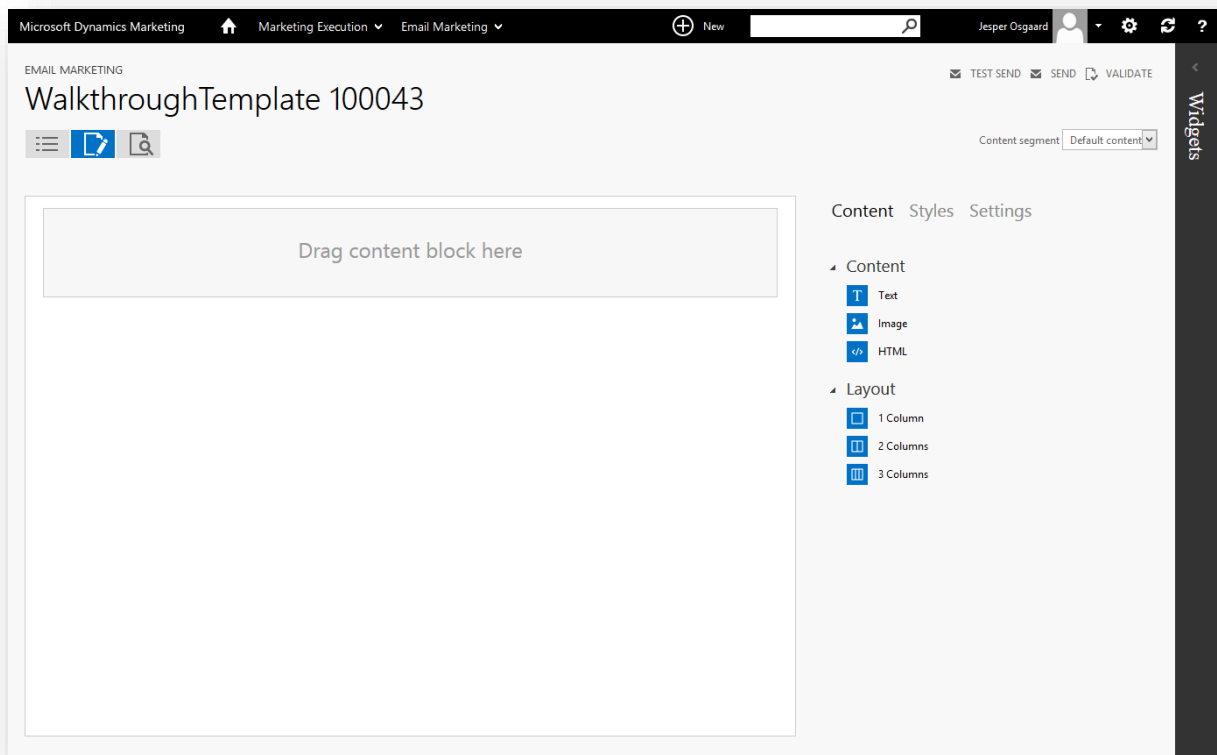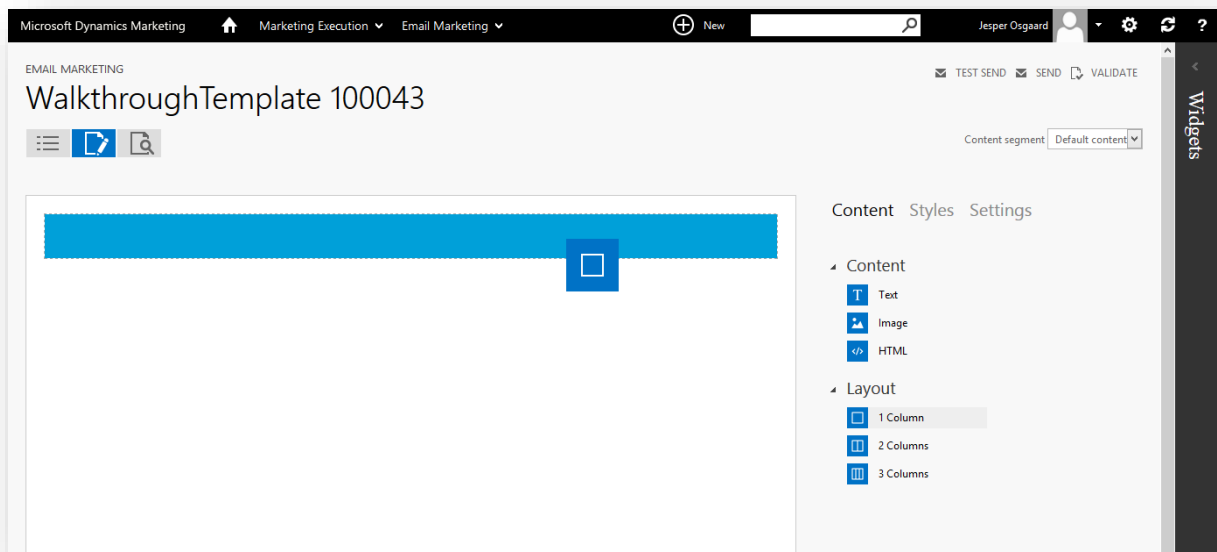
8. Drag a **Text** block T from the **Content** area onto the column that you just placed on the canvas.
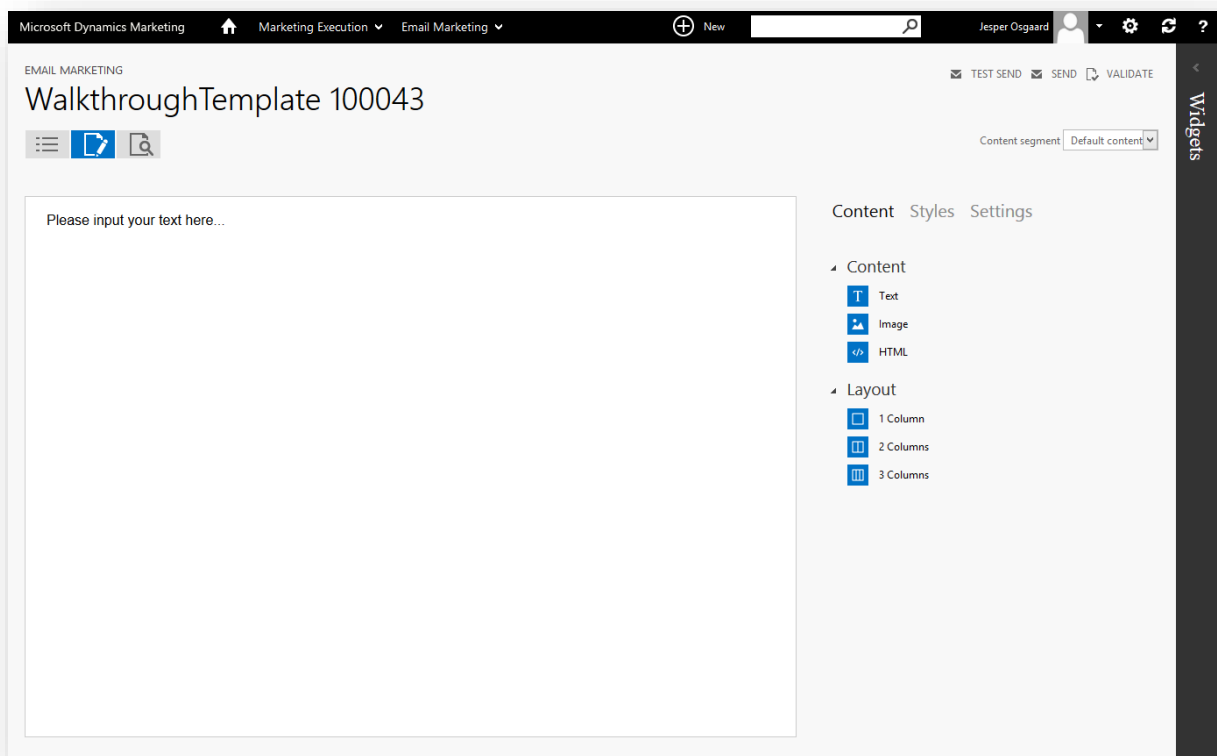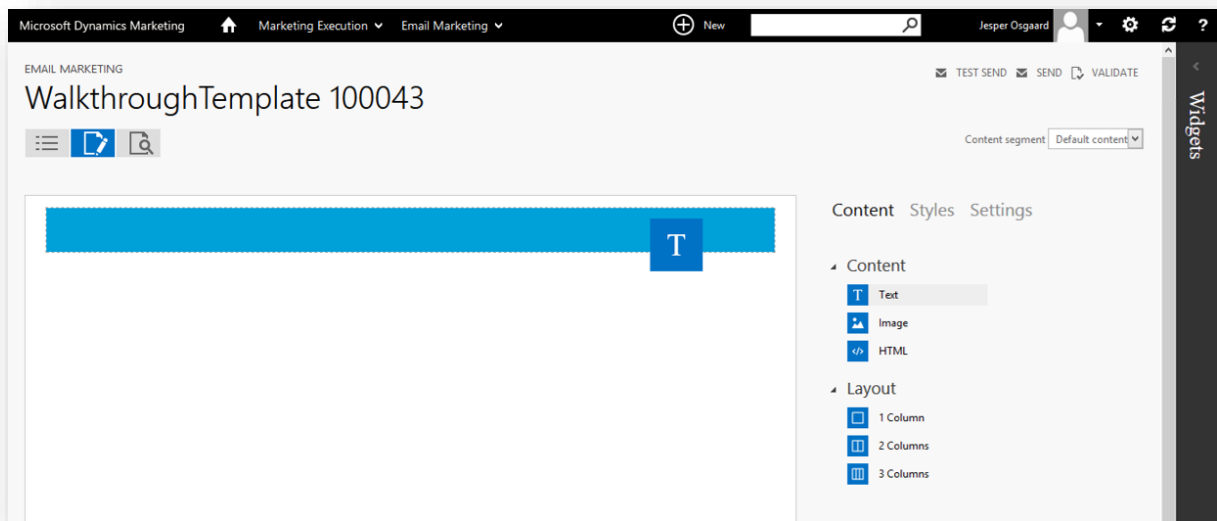
9. Choose the "Please input your text here…" text that appeared on the canvas after you dropped the **Text** block there. The <u>rich text editor</u> now opens in the <u>right-hand column</u>. It too shows the text "Please input your
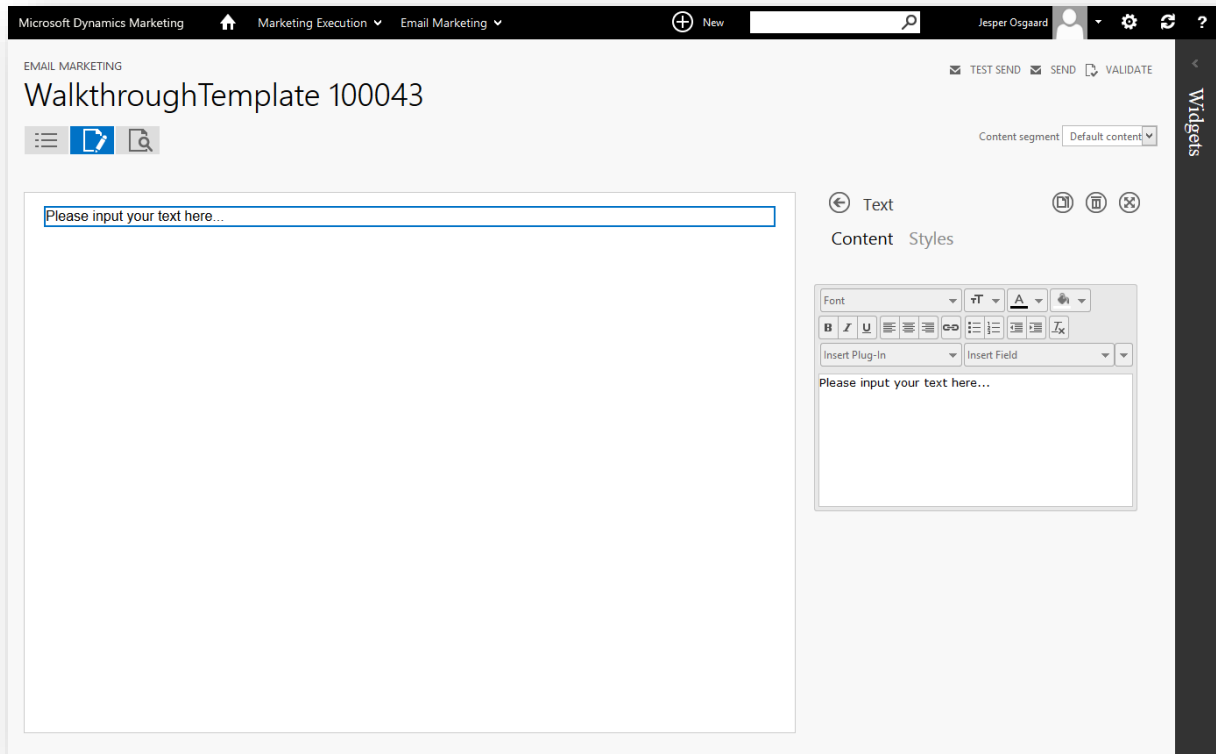
text here…"

10. Do the following while working in the rich text editor:

o Select and delete the placeholder text.
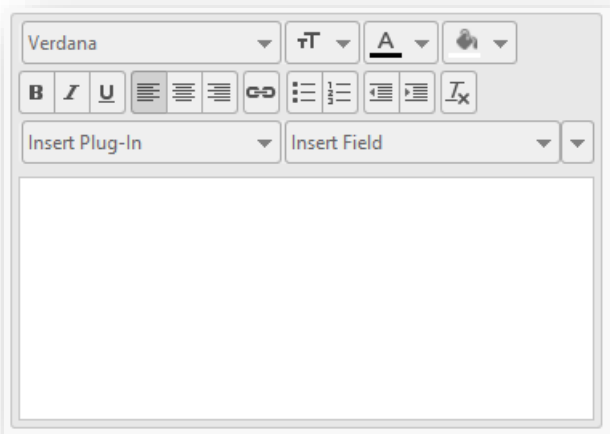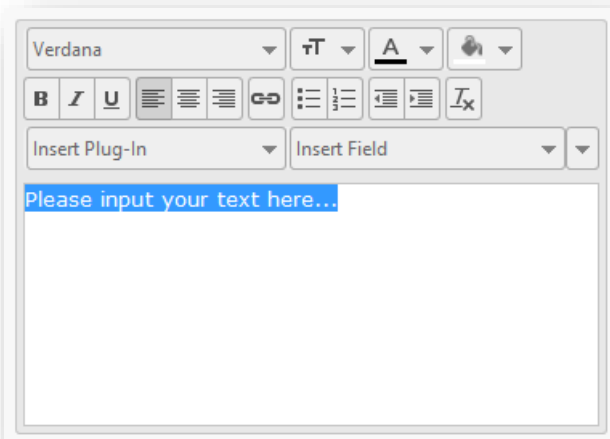
o Create a greeting by typing "Hello" in the text box, and then choose "First Name" from the **Insert Field** drop-down list. The result looks like: "Hello @Contact.FirstName" (be sure to include a space before the @). Later, when Dynamics Marketing sends the emails, it replaces the second part of this text with each contact's actual first name. You can add other fields, for example, last name, to the text as needed using this drop-down, and mix these values freely with other text, graphics, plug-ins, etc.
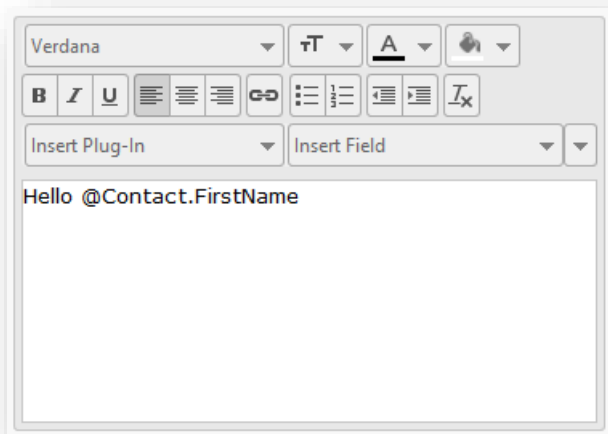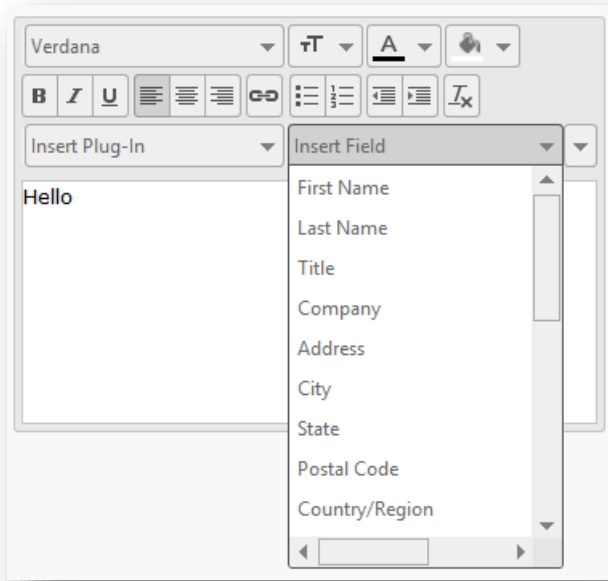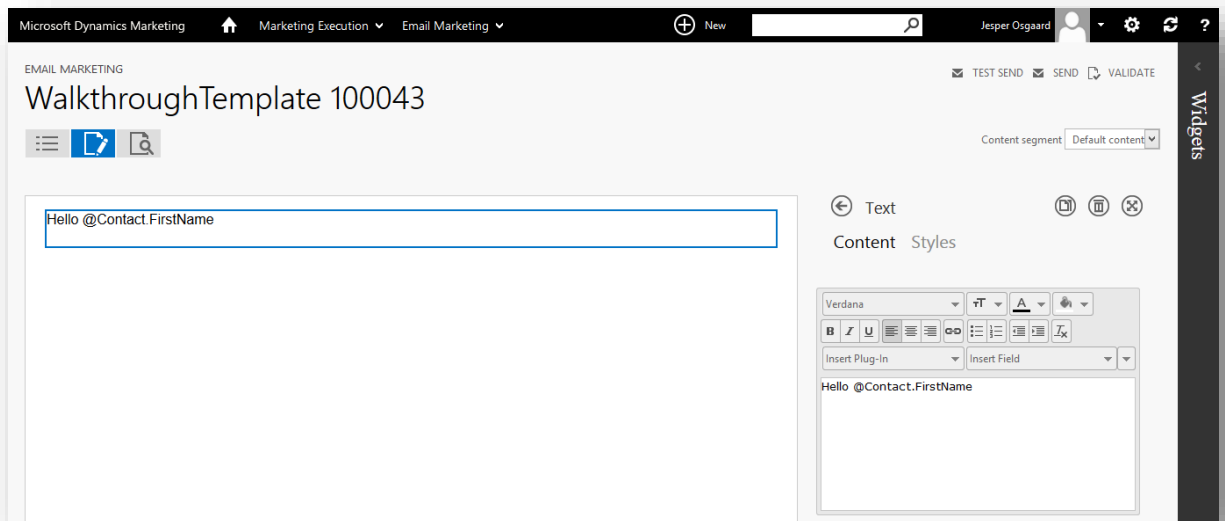
o With the cursor on a new line, choose the **Insert Link** button [link icon] to open the **Insert Link** pop-up. Enter an arbitrary **URL**, for example, "bing.com," and **Title** (display text) in the fields provided and choose **OK** to place the link.
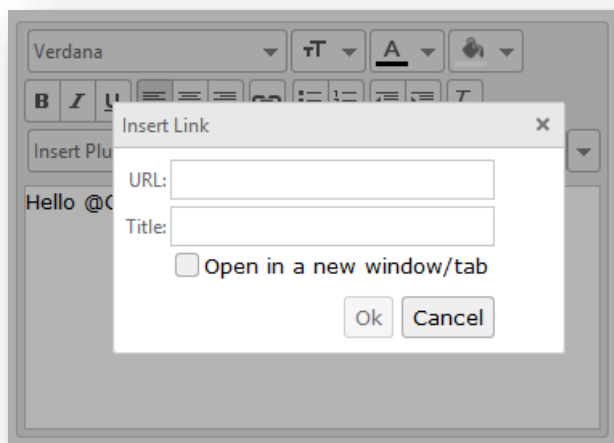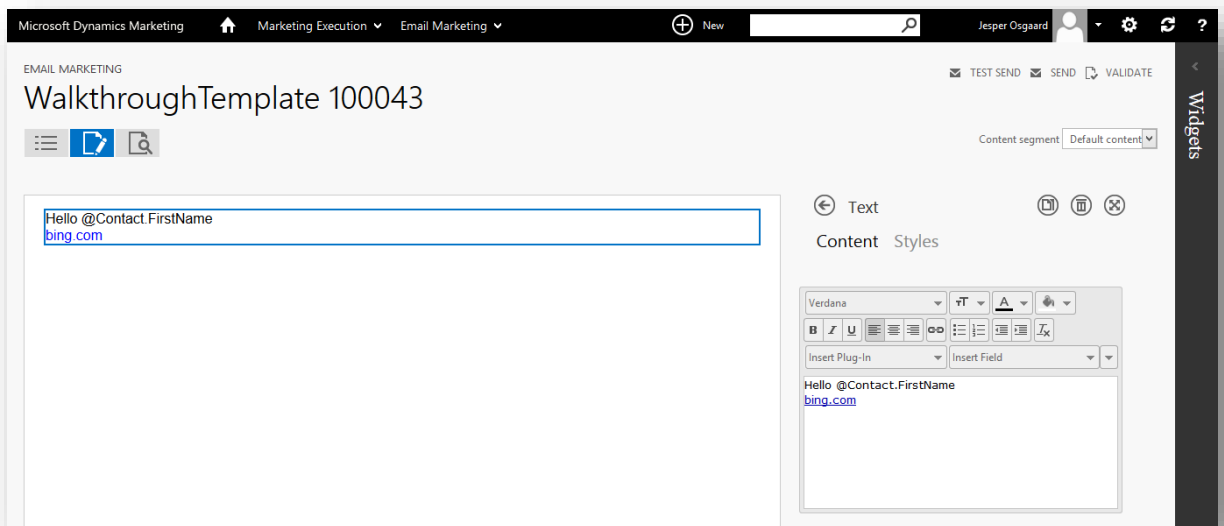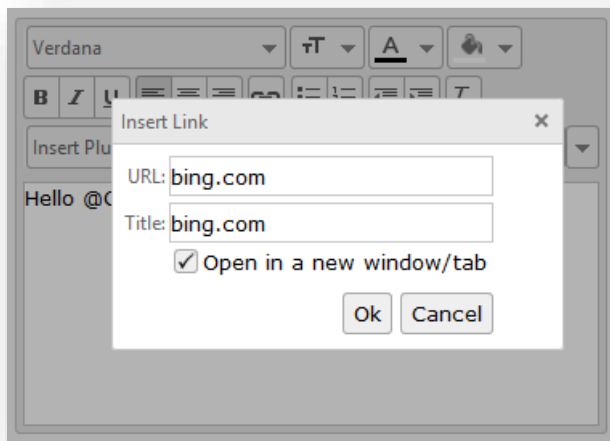
o Create a new line, then open the **Insert Plug-In** drop-down list and choose **Subscription Center**. (Note that the actual subscription-center plug-in used will be the one that you set on the **Summary** tab earlier in this procedure.)
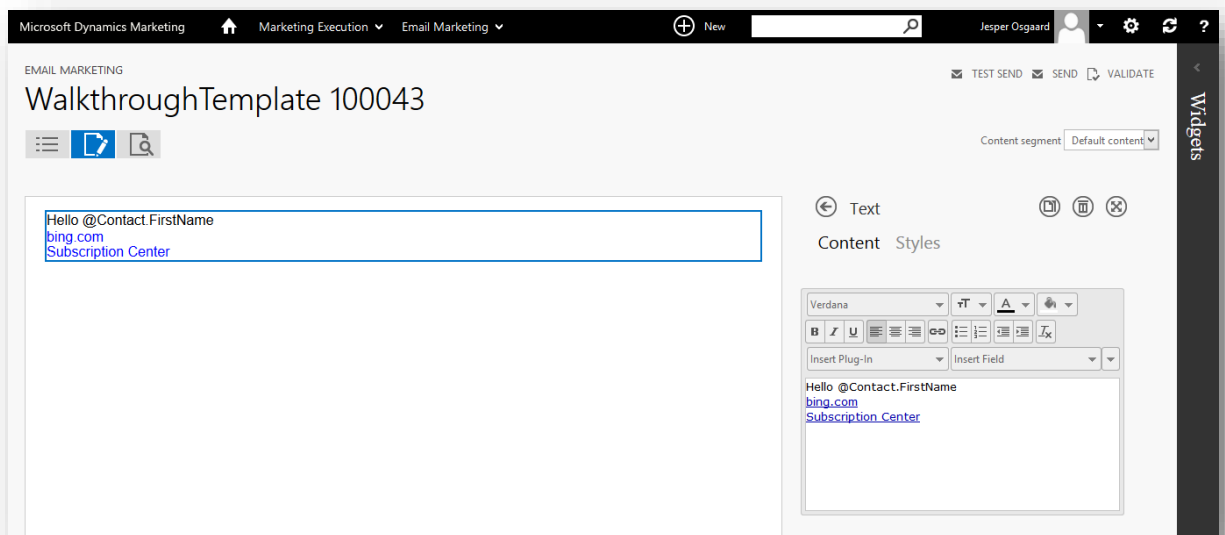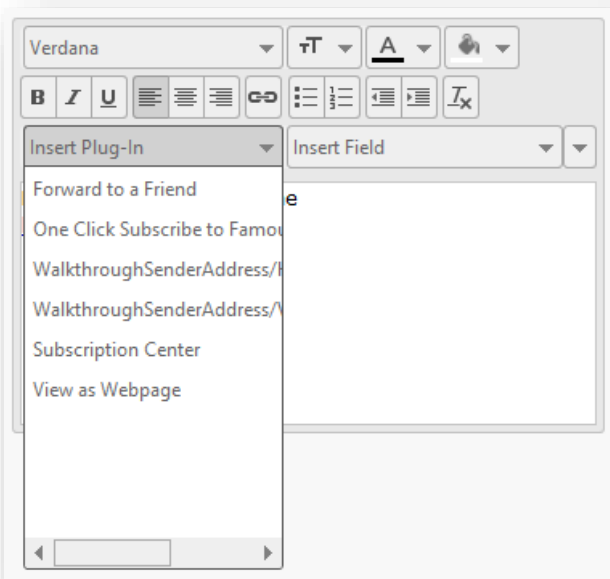
o Place the cursor at the bottom of the text and open the **Insert Plug-In** drop-down list; choose the horizontal or vertical version of the sender-address plug-in you created.
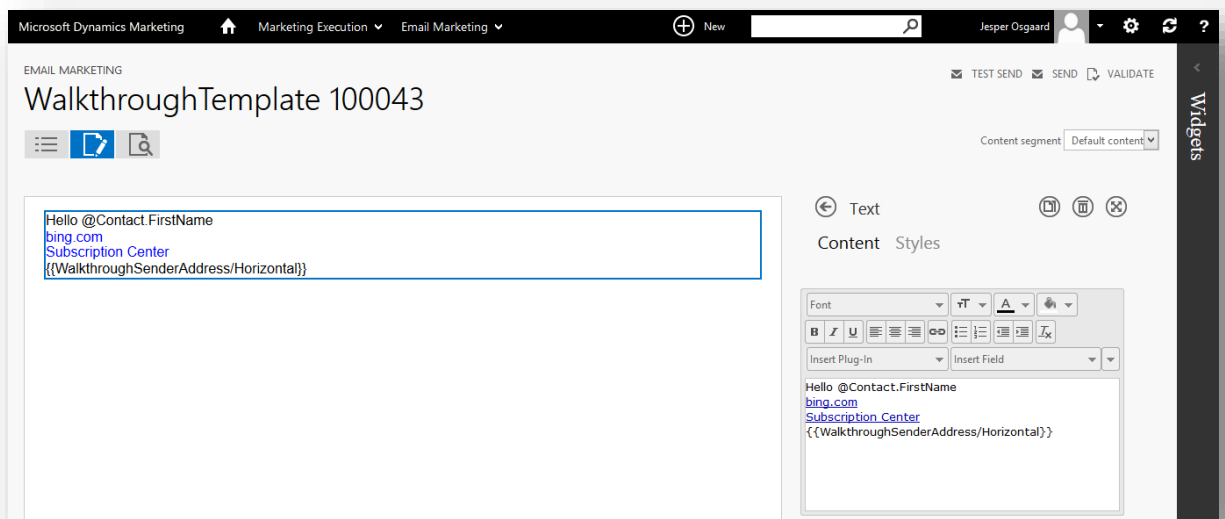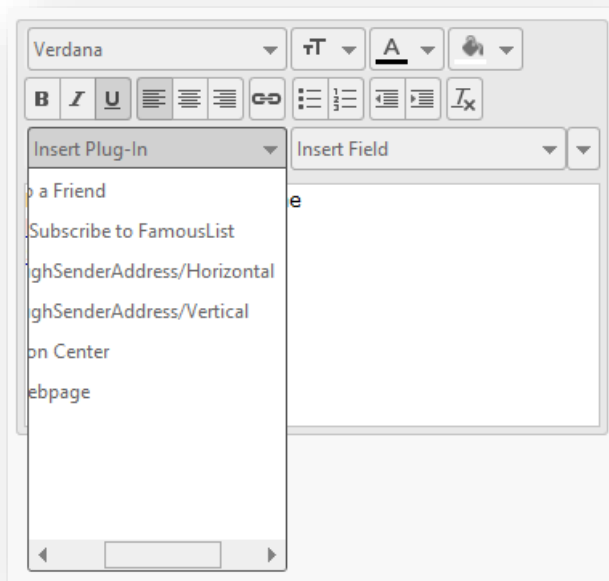
o Your text should now look something like this:

```
Hello @Contact.FirstName
Bing.com
Subscription Center
{{WalkthroughSenderAddress/Horizontal}}
```

11. Optional – choose the **Validate** button at the top right corner to see the Validation Results so far. Note that amongst other things we need to provide a Subject. Click the X to close the Validation Results dialog
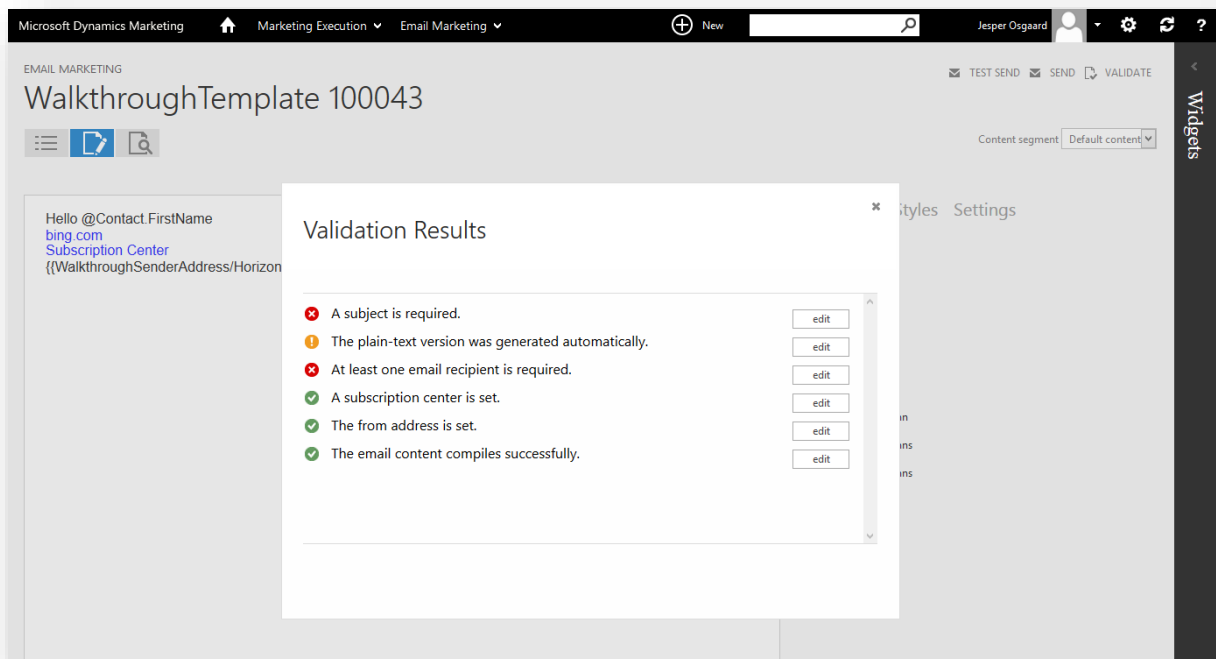
12. Click the back button above the text editor to close the editor.
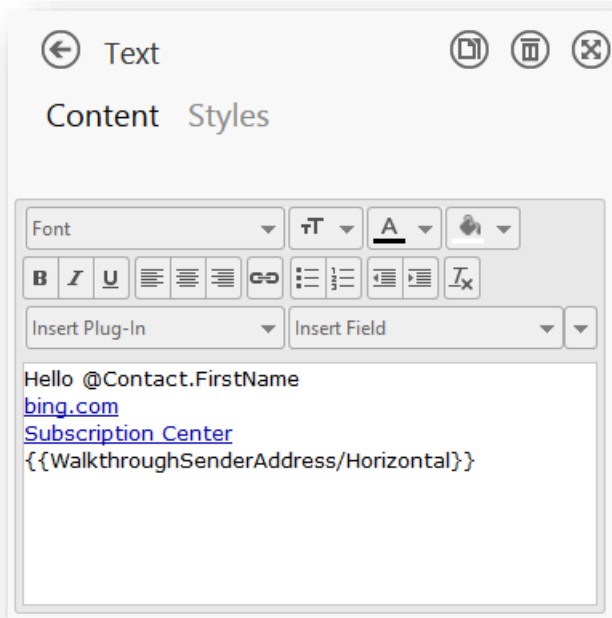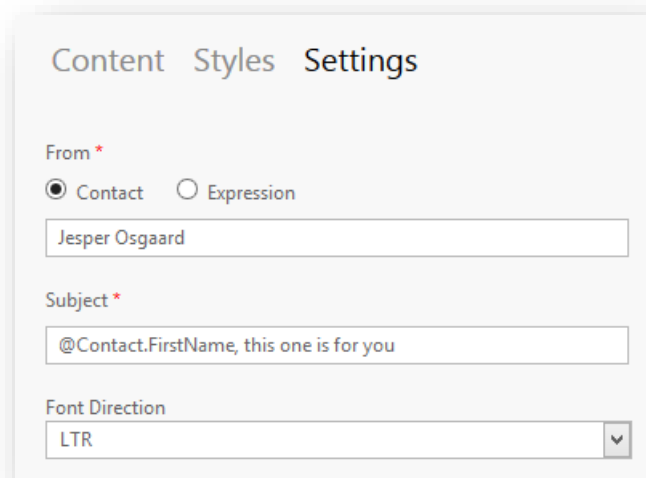
13. Choose **Settings** in the right-hand column to open the **Settings** form.
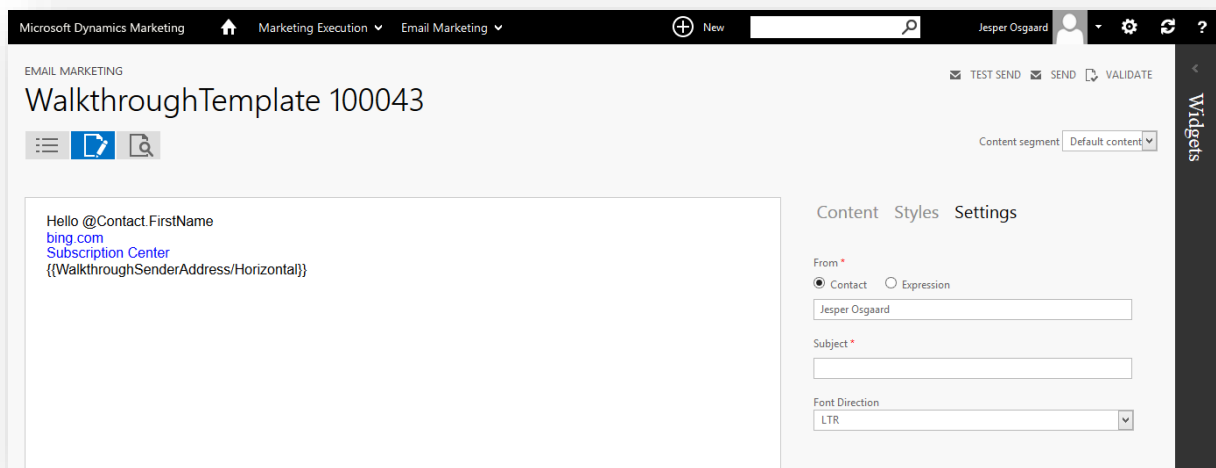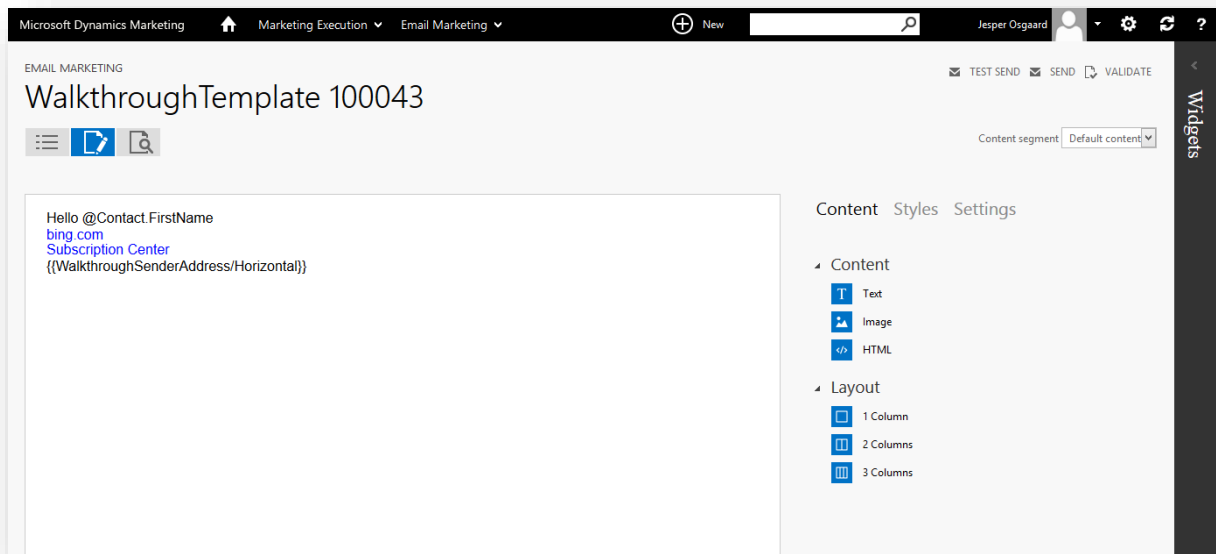
Enter the following:

o **From**: This is the address that contacts will see in the "from" field when they receive your email. By default, it is set to your user; leave this for now. Note that you can also set this to an expression if you would instead like to show, for example, each contact's own sales representative here (see the online help topic Design message content using the graphical editor for details).

o **Subject**: Enter a subject for the mail. Contacts will see this text in the "subject" field when they receive your email. Note that you can also include field values here using the same syntax as in the body text, so to add

the contact's first name to the subject, enter "@Contact.FirstName".

Tip
A familiar From address and an enticing Subject can drastically improve open rates.

14. Click [icon] to return to the summary page and then choose **Submit** to save and close your new template.
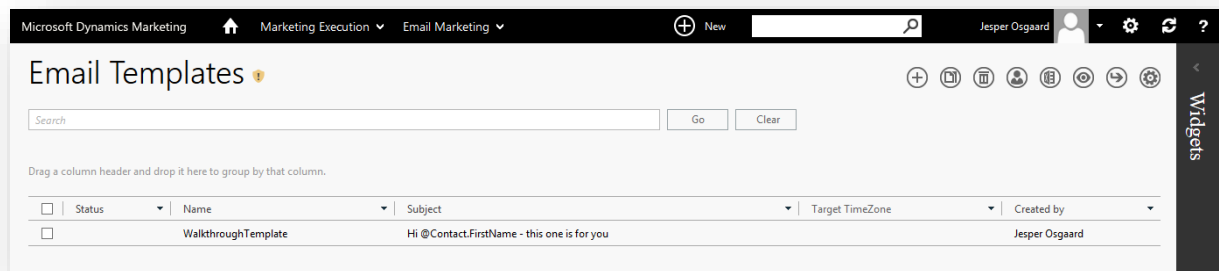
Step 4: Create, verify and send a marketing email

Now that you have created a basic template, you can use it to create a new marketing email and then verify and send the email.
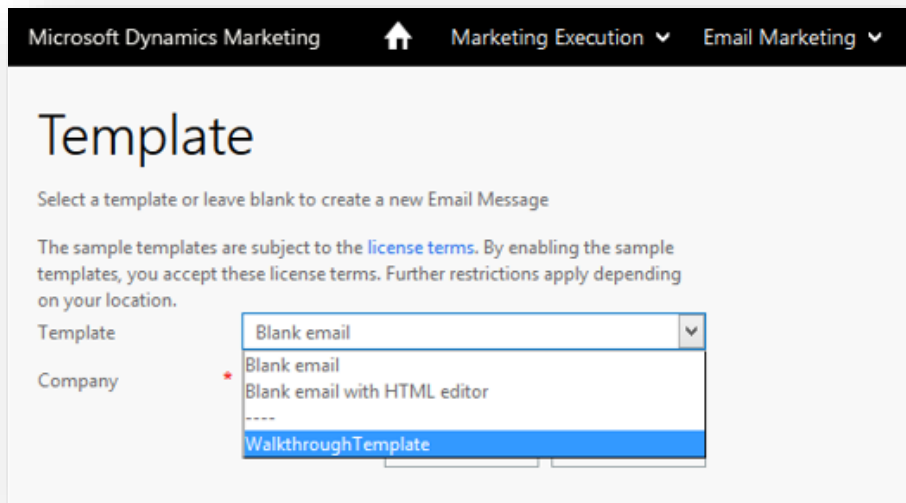
1. Go to **Marketing Execution** > **Email Marketing** > **Email Marketing Messages**. The **Messages** list page opens.
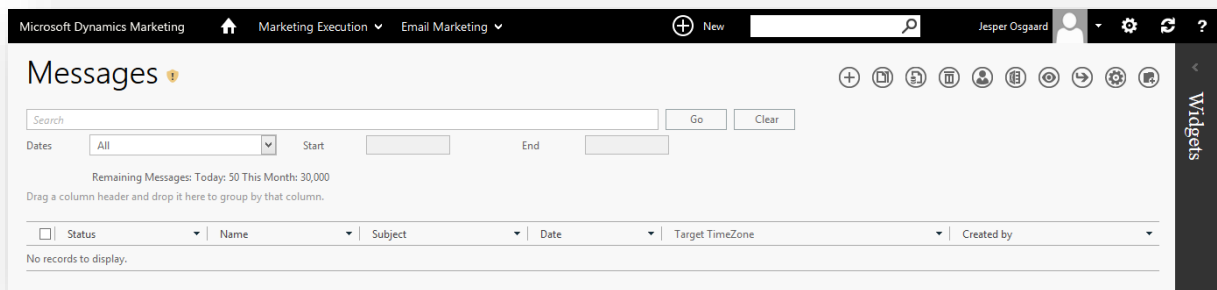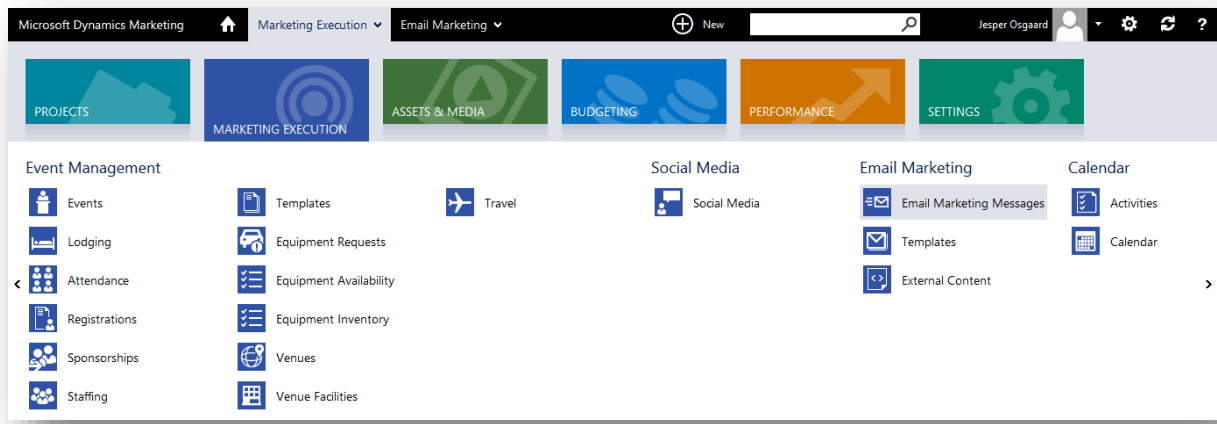
2. Choose the **New** button in the toolbar. The **Template** page opens.

3. Make the following settings:

o   **Template**: Choose the template that you just created.

o   **Company**: Set to the same fictional client that you used for your plug-ins and list.

o   **Send externally**: Leave this box unchecked (if present).

4. Choose **Submit** to go on to the **Email Marketing** maintenance page.

Enter the following values here:

o **Name**: Enter a descriptive name that you and others will recognize, for example, "WalkthroughCommercialEmail").

o **Designation**: Leave set to **Commercial** (this setting was inherited from the template).

o **Subscription Center**: Leave set to the plug-in that you created (this setting was inherited from the template).
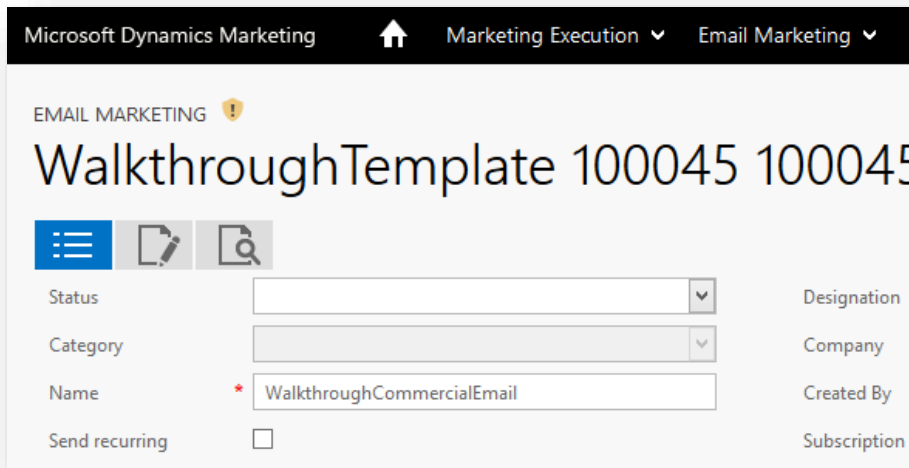
See also the online help topic Create or view email marketing messages for more information about the settings on this page.

5. Choose **Save** to save your settings while remaining on the **Email Marketing** maintenance page.

6. After you have saved the page at least once, the related-information area is shown at the bottom of the page (below the dotted line). Choose **Lists/Queries** from the drop-down at the top of this area to open

the **Lists/Queries** related-information tab.

7. Choose the **Add** button ⊕ in the toolbar for the **Lists/Queries** related-information tab. The **Select Lists/Queries** pop-up opens, showing a list of all marketing lists belonging to the same company as the current marketing email.

8. Mark the **Send** checkbox for the marketing list that you prepared for this walkthrough (as mentioned in the prerequisites, see also "Step 3: Create a static marketing list", page 21).

Then choose **Submit** to add the list to your marketing email. Dynamics Marketing will send the email to all of the contacts in all of the send lists that you include here. (Note that you can also add suppression lists, which block listed contacts from receiving the mail, thus overruling the send lists.)

9. Choose **Save** to save your settings while remaining on the **Email Marketing** maintenance page.

10. Because you started with our basic template, your email already includes all of the remaining required settings and plug-ins. Go to the **Edit Content** top-level tab to see your template design. (Note that your email is now completely independent of the template; settings that you make in the email from now on will not affect the template and if you update the template, your changes there will not affect any existing email designs that

used it.)
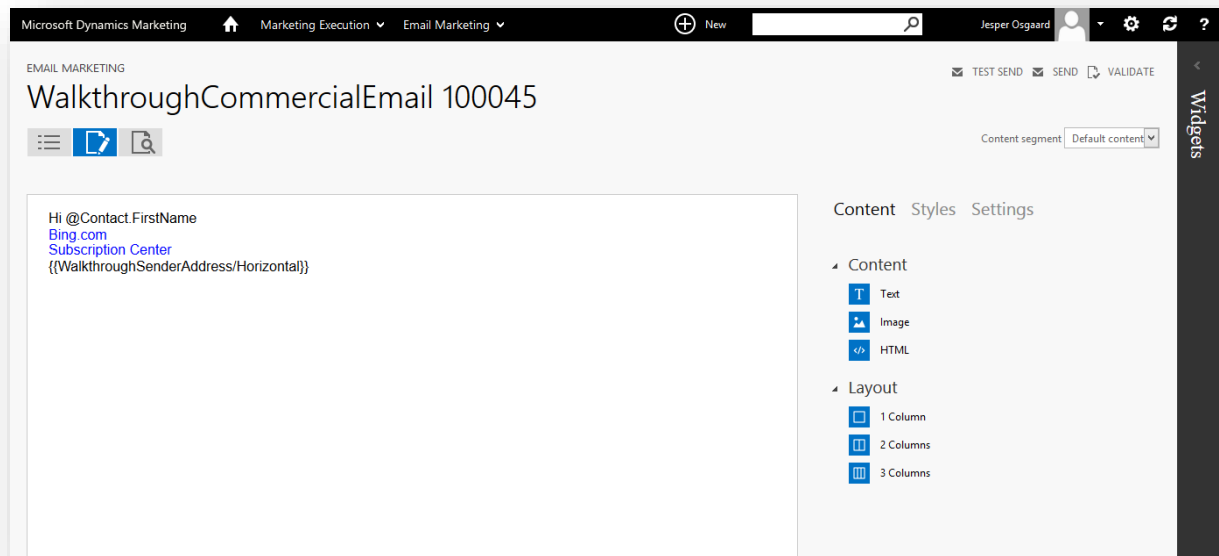
11. Choose the **Validate** button ⬚ VALIDATE at the top-right of the **Edit Content** page (also available at the bottom left of the **Summary**). Dynamics Marketing checks your message to ensure that it meets the minimum requirements for content and anti-spam regulations. The **Validation Results** pop-up opens on your screen, showing the results of the test

.
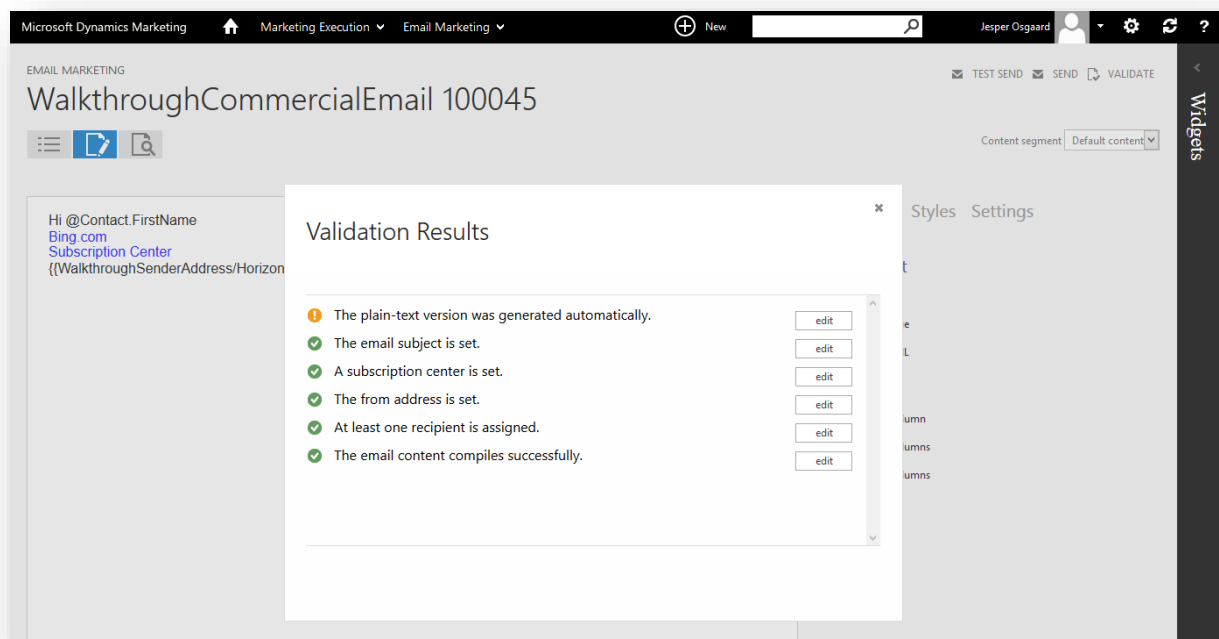
12. You may also see the following message: "The plain-text version was generated automatically." Dynamics Marketing emails automatically include both a rich-text (HTML) and plain-text version of your design (spam filters often check to make sure the plain-text and HTML versions of an email both exist and roughly match one another). However, you have not yet seen the auto-generated plain-text version, so you should inspect it now.

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
Select the **Edit** button next to this message in the **Validation Results** pop-up. This opens the **Plain-Text Email** editor, which you can use to clean up your text message if you like. Be careful not to disturb the special codes used to place your field values and plug-ins. Choose **Save** when you are done.
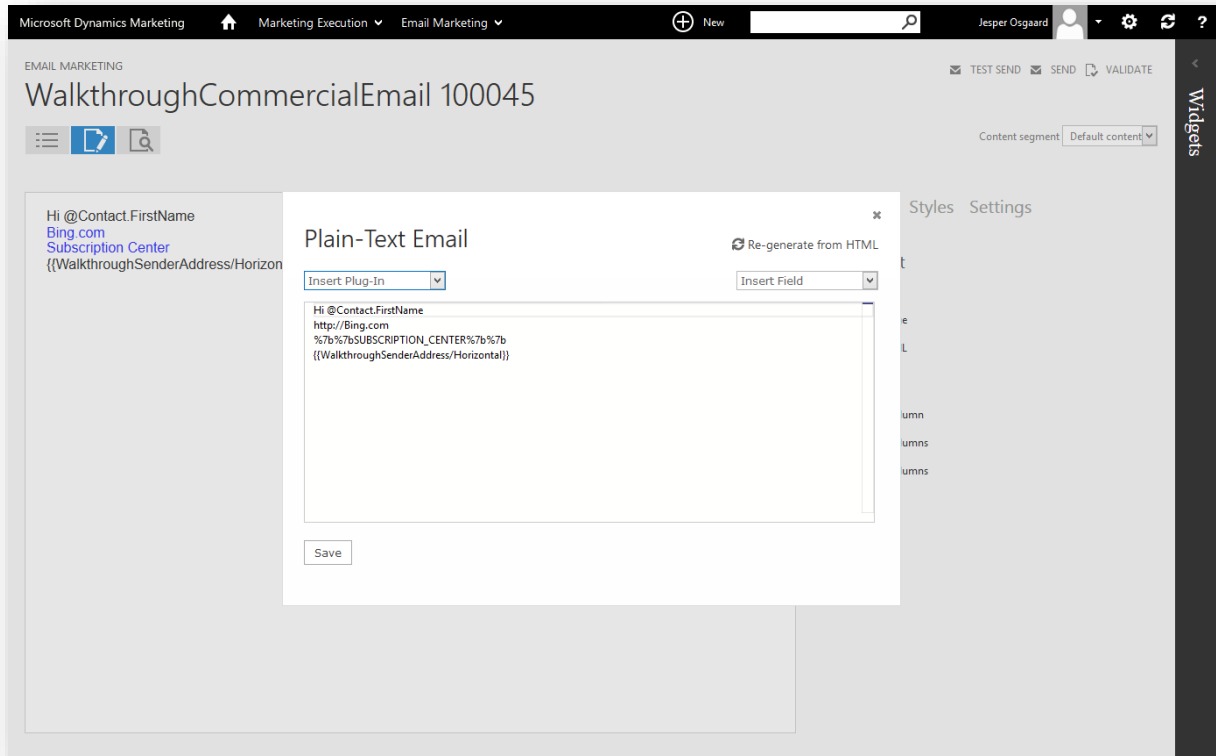
13. Choose **Validate** again to re-run the validation check. This time you should see that all tests have passed, but if not, continue to use the Edit buttons here to address any further errors that are reported. Otherwise, just select

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the close button to close the **Validation Results** pop-up.
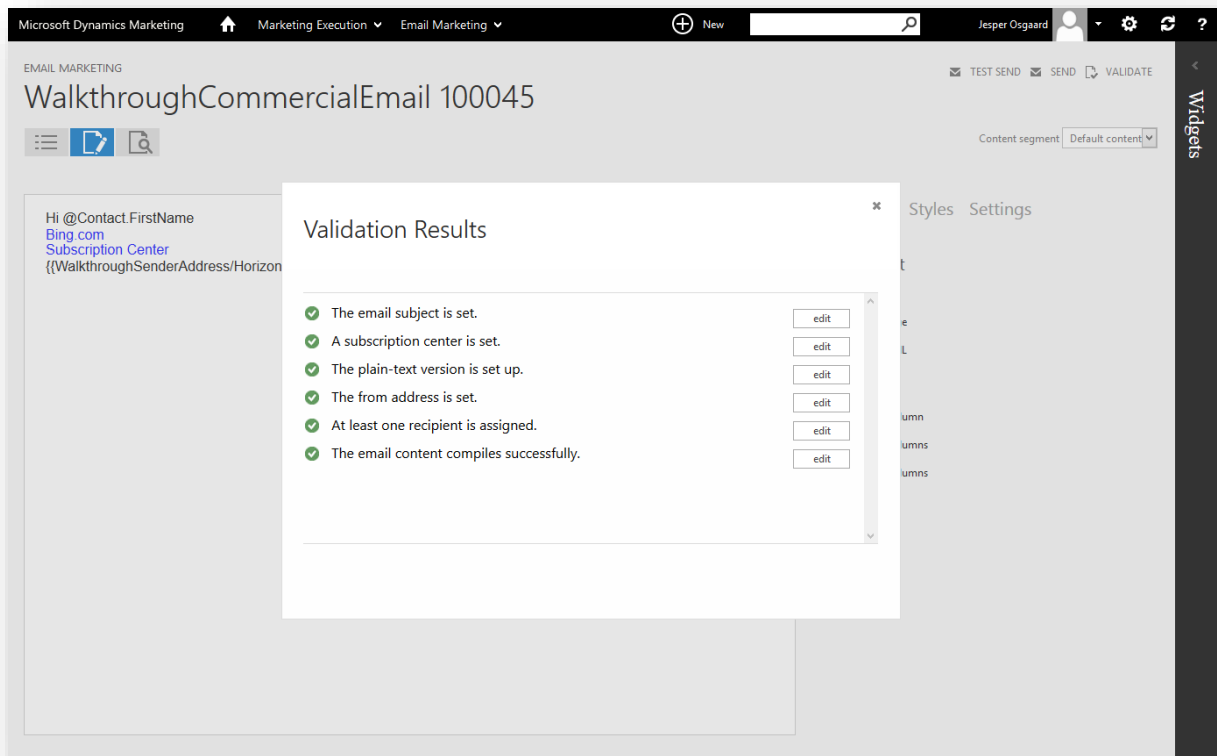
14. Your message is ready to send. Select the **Send** button ✉ SEND at the top-right of the page. This actually runs the validator again, bringing you back to the **Validation Results** pop-up, which should show green checks for everything. Select **Send Now** to send the message.
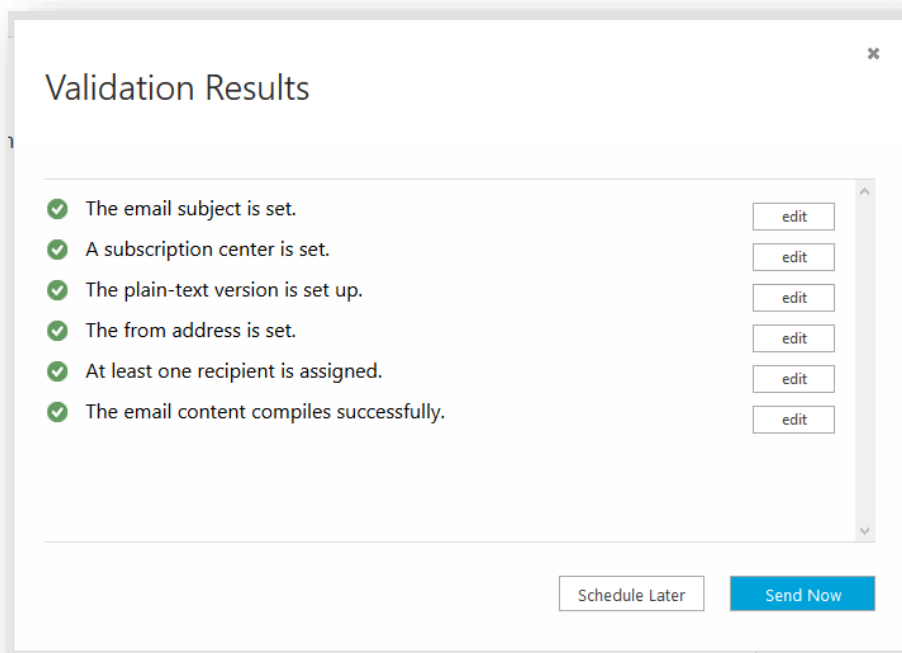
The messages are queuing to be sent to the contacts on your marketing list
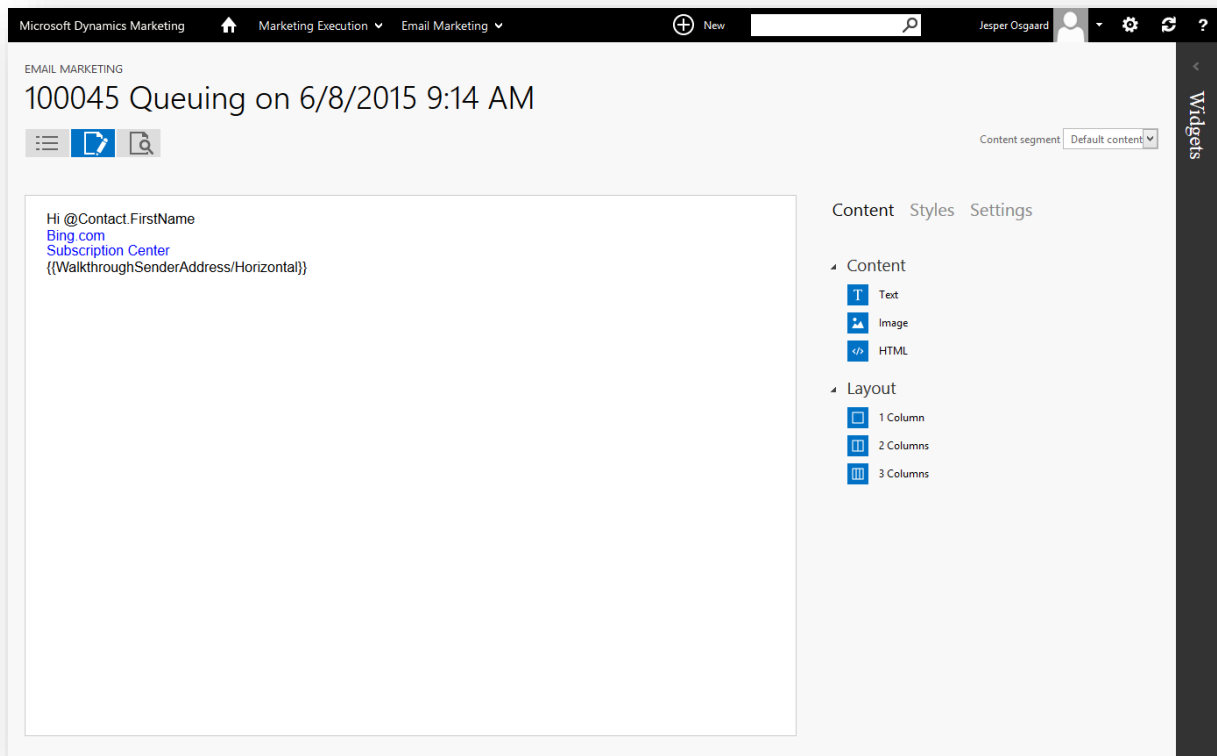
and soon after dispatched
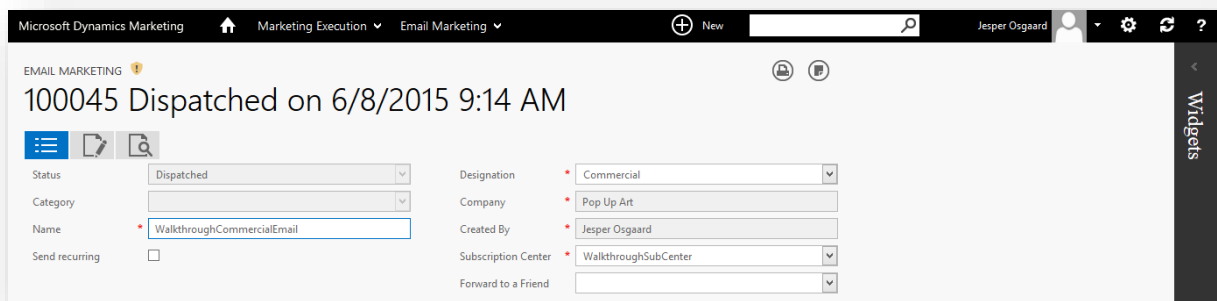
Step 5: Interact with the mails and view performance results

Your mail has now been sent to all of the contacts on your send list. In this case, your list should have included at least two contacts, each with a different name but both using an email address that you can read. Now you'll interact with the mails and see how Dynamics Marketing is able to track your actions.

1. Go back to the maintenance page for your marketing email in Dynamics Marketing (under **Marketing Execution** > **Email Marketing** > **Email Marketing Messages**) and select the **Summary** top-level tab.
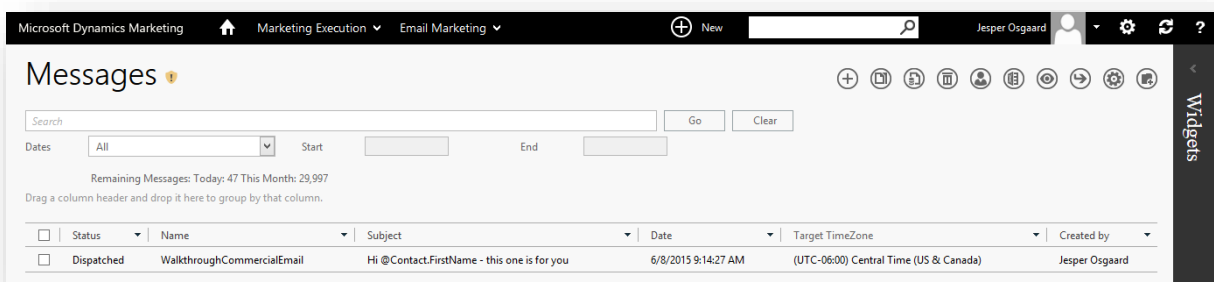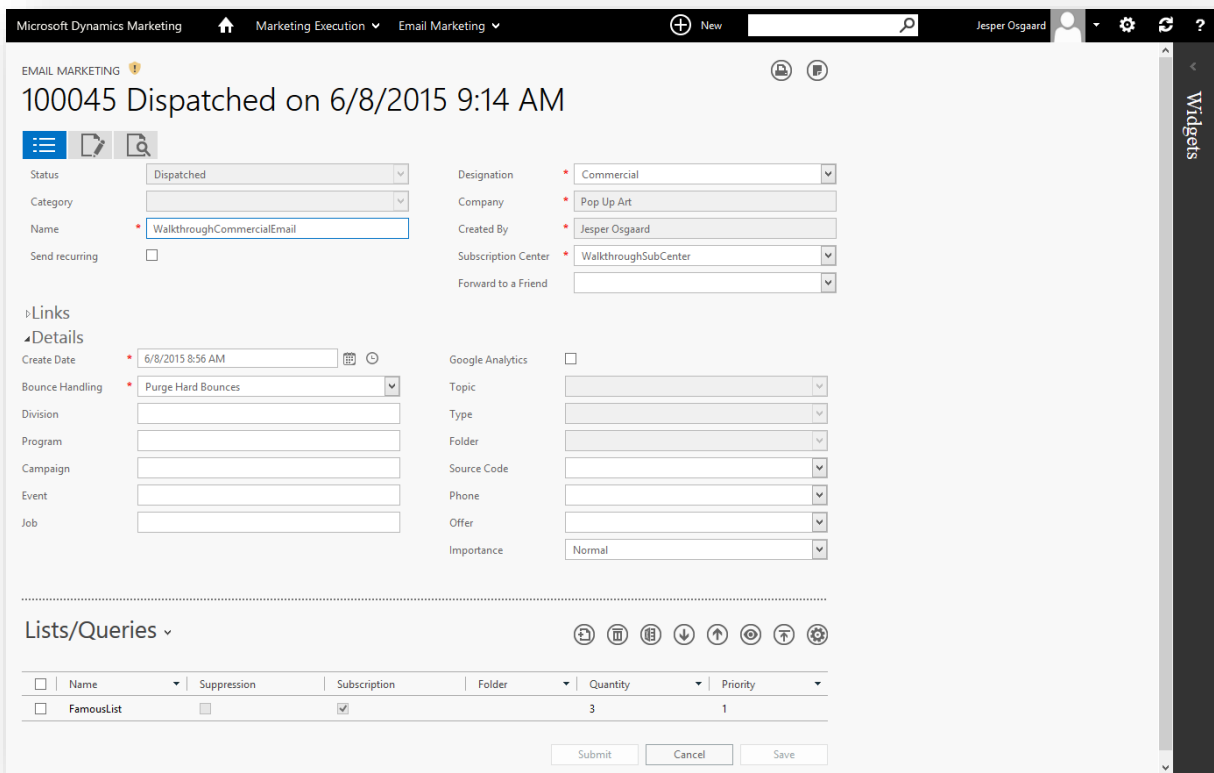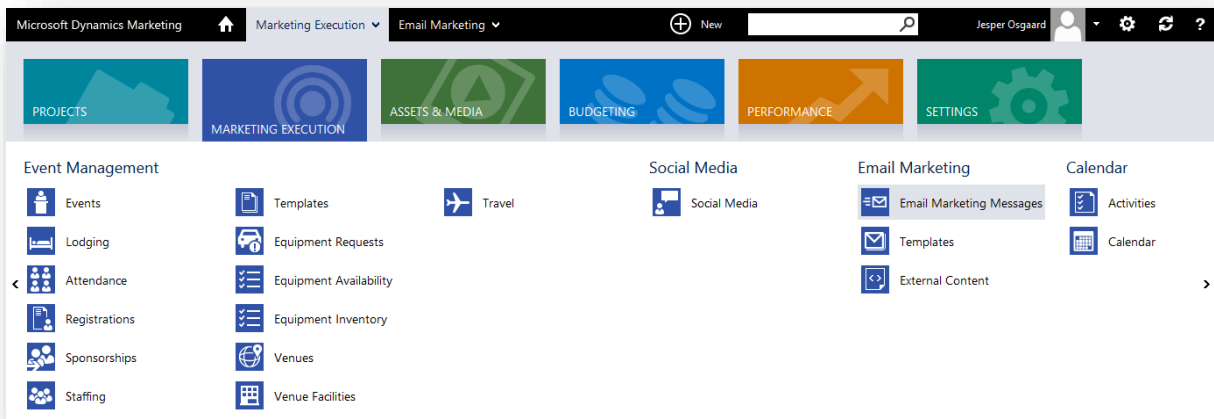
2. Open the **Performance** related-information tab using the drop-down list under the dotted line.
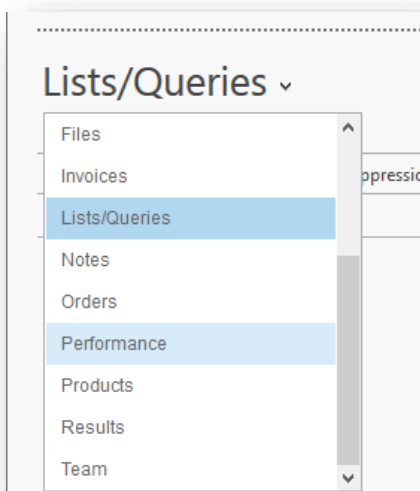
Here you can see three fold-down sections: **Chart**, **Summary** and **Details**, each of which displays charts and statistics about the performance of your email (expand the sections to see more). Right now, you should be able to see the number of people the email was sent to, but not much else.
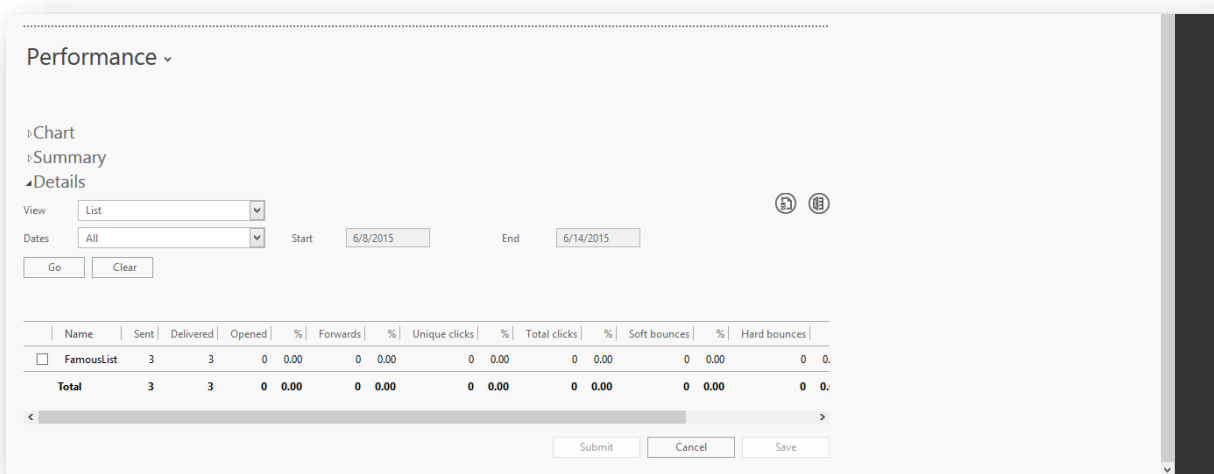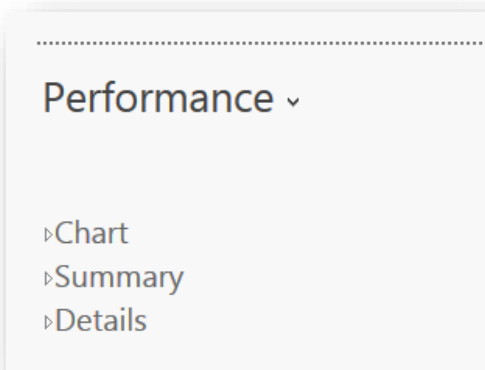
3. Go to the inbox for the email account to which you sent the emails, where you should now see your test emails (you may need to wait a minute or two before they arrive). Open just one of the emails and note or do the following:

   o If your mail client is configured to load images only after the user approves it (as many clients are), choose to load the images (even if you think there aren't any).
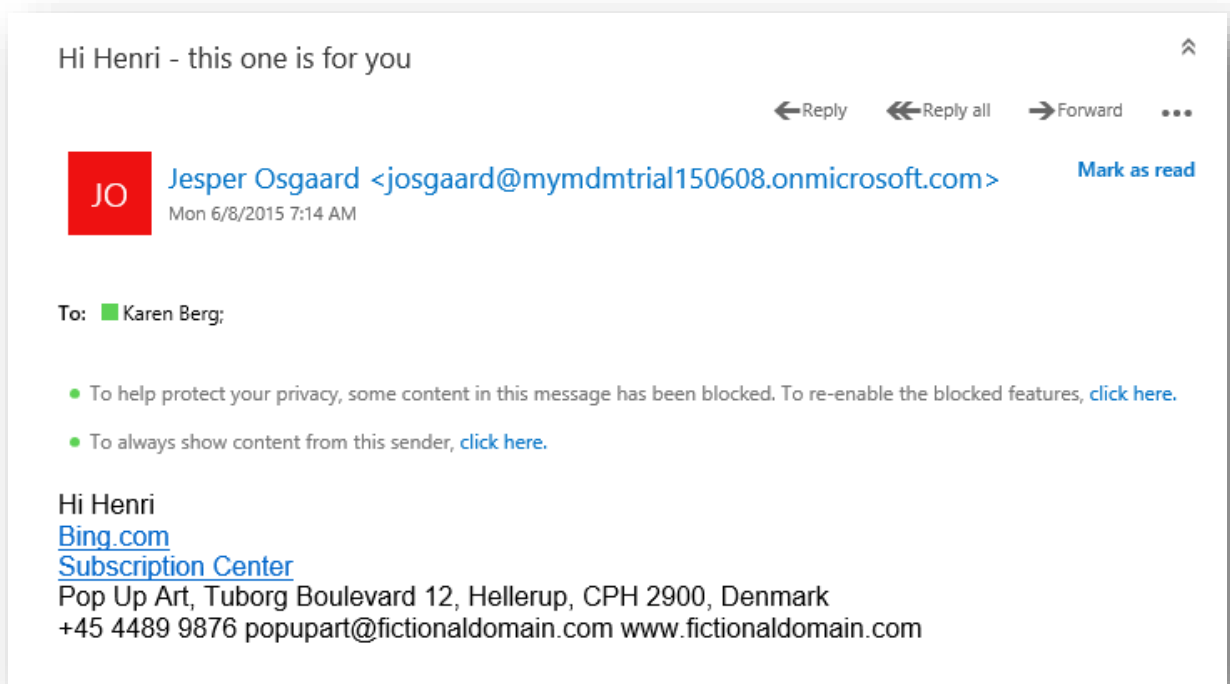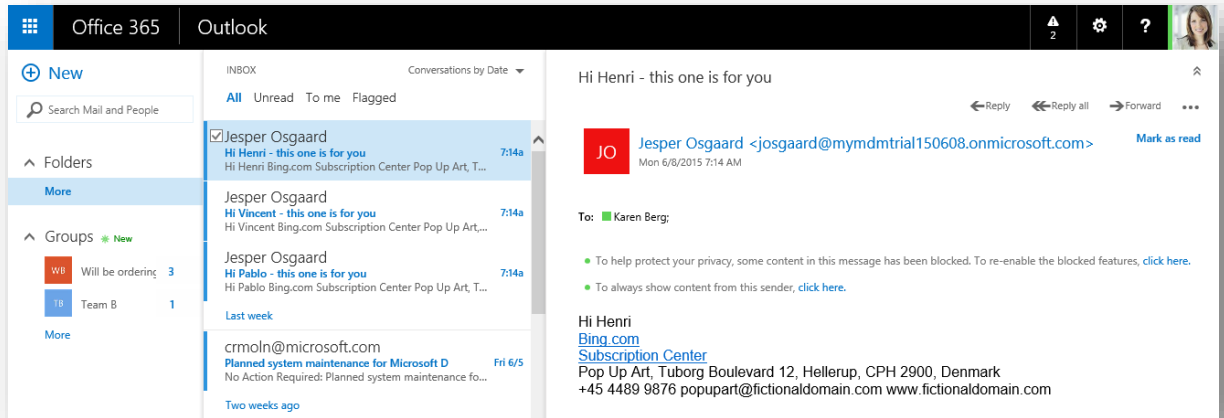
   o You should have included an arbitrary link in the mail (for example, to Bing.com). Click this link if you didn't already.

   o Try the subscription center link. This brings you to a page hosted by Dynamics Marketing, which provides a form enabling you to subscribe and unsubscribe to various mailing lists (those configured as *subscription lists* for the same company that owns the contact, list, email and subscription center plug-in). Try to unsubscribe to one or more lists and then submit the form. (Note – if you have only one marketing list marked for subscription, you'll see only the "Remove form all mailing list" checkbox below)

4. Now go back to the **Summary** page for your email design and look at the **Performance** information. After a minute or two, you should be able to see that your mail has been opened, that a link was clicked and that an unsubscribe event occurred. Experiment with the various graphics, views and statistics here. Note that you can even click through from the **Summary** table to see exactly which contacts unsubscribed from which lists.

So how can Dynamics Marketing collect all of these details about how contacts interact with your emails? To find out, continue on to Walkthrough 3: Behavior analysis and campaign automation.

Walkthrough 3: Behavior analysis and campaign automation

In this walkthrough, you'll learn about the behavior-analysis features of Microsoft Dynamics Marketing, some of which you've already seen when interacting with emails in "Walkthrough 2: Create, send and monitor a marketing email, page 32". You'll be able to see how the background details associated with behavior analysis come into play during an automated campaign.

Introduction to behavior analysis

The behavior-analysis features of Dynamics Marketing enable the system to analyze how contacts interact with your emails, websites, events, and campaigns.

How are interactions recorded?

Dynamics Marketing makes use of the following technologies to collect behavior data:

- **Email graphic (invisible GIF)**
  Dynamics Marketing automatically embeds an invisible GIF into all marketing emails. The GIF itself is hosted on the Dynamics Marketing server, so the email client must request it when a contact opens the mail. The image link is constructed so that it submits an ID code together with the image request, thus identifying the contact and email message to Dynamics Marketing. (If contacts don't choose to allow images to load, Dynamics Marketing won't register the mail as opened. As a result, you might sometimes see results where there are

more "clicks" than opens. Therefore, it can be a good idea to design graphically rich emails that include useful images, thus tempting contacts to load the graphics.)

- **Redirect URLs**
  All links that you embed in your marketing emails are coded to link to Dynamics Marketing first (which records the click and associates it with a specific contact and email message) and then forwards the user directly to the expected URL.

- **Cookies**
  Cookies enable a web server to uniquely identify a specific browser program and computer. It's an important technology for enabling website sign-ins and ecommerce. The cookie itself is a string of text and associated metadata sent from a given web server and stored in the browser. The cookie metadata identifies the server that set it and specifies an expiration date. Whenever the browser communicates with a server it has a cookie from, it automatically sends that cookie back to the server together with each page request, thus identifying the client. For more information about how Dynamics Marketing uses cookies, see the online help topic Cookies and privacy issues.

- **Website behavioral-analysis scripts**
  Dynamics Marketing is able to generate behavioral-analysis scripts, which interact with cookies as a contact browses a site, thus enabling Dynamics Marketing to record site visits. The script must be included on each page where you wish to record visits.

- **Direct interactions with landing pages, subscription centers, forwards, and other forms**
  Dynamics Marketing generates several types of pages that interact directly with contacts, including subscription centers, forward-to-a-friend pages and landing pages. Each of these provides a form that interacts directly with Dynamics Marketing. Here, Dynamics Marketing is receiving input directly from a contact and is able to associate that input with a contact, campaign, email, lead, website and other elements.

What's recorded?

Dynamics Marketing uses the previously mentioned technologies to record the following actions:

- **Email opens and clicks**
  Dynamics Marketing emails automatically include an invisible GIF and redirect URLs, each of which contacts the Dynamics Marketing server when activated and identifies the email message and the individual contact. This data is used to analyze the engagement of individual contacts and to measure the success of individual email campaigns. (Clicks on plug-in links are not counted as email clicks; these interactions are recorded separately.)

- **Website visits**
  Website behavioral-analysis scripts and cookies enable Dynamics Marketing to record website visits. Cookies enable each browser to be uniquely identified, but the actual contact will remain anonymous until he or she submits a landing page, thus enabling the anonymous cookie ID to be mapped to a Dynamics Marketing contact ID.

- **Landing page visits and submissions**
  In Dynamics Marketing, a "landing page" is an HTML form that enables visitors to enter and submit contact details such as their name, address and email. You might typically use them to enable people to sign up for a mailing list, event, webinar, download, etc. The landing page should include a website behavioral-analysis script to enable Dynamics Marketing to log the visit and to associate the newly registered contact with any existing, anonymous website behavioral-analysis data. On submission of the form, Dynamics Marketing matches the incoming first name, last name, email and belongs-to company against existing contacts; if all four values match an existing contact, then that contact is recorded as having submitted the form (which could then be used to create and score a lead linked to that contact). The landing page also stores its own cookie that encodes all user-submitted values, thus enabling it to remember and display these as default form values if the contact returns to the form in the future.

- **Offer response**
  Offers are a special type of managed link that you can include in your marketing emails. The link is a redirect URL, which not only registers that a contact has engaged with the email and offer, but also can redirect to different URLs depending on whether the offer is valid (according to date range and claims limit (if any)). Dynamics Marketing records how many times an offer was delivered and claimed.

- **Mail forwards**
  Dynamics Marketing provides a forward-to-a-friend email plug-in feature, which can provide a link to a forwarding form hosted by Dynamics Marketing. When a contact clicks on the link, Dynamics Marketing displays a form in which the contact can enter one or more email addresses. Dynamics Marketing then logs each entered address as a "forward" and sends copies of the original mail to each address. Dynamics Marketing is not able to record when contacts use the forward button in their email client.

- **Unsubscribes**
  The Dynamics Marketing subscription center enables contacts to add or remove themselves from mailing lists. A link to a subscription center must be included with all marketing emails. Dynamics Marketing records which users unsubscribe in response to which marketing emails.

How is behavior and interaction data used?

Once collected, behavior and interaction data is used in Dynamics Marketing as follows:

- **Judge email performance**
  For each marketing email you send, Dynamics Marketing records the number of opens (via the invisible GIF), clicks (via redirecting URLs), forwards (via forward-to-a-friend) and unsubscribes, plus several other factors that aren't related to contact interaction (such as bounces).

- **A/B testing**
  This feature enables Dynamics Marketing to send two similar emails to different sets of recipients and then compare the performance of each version to choose a winner. You can configure the victory conditions, but they will be based on the same metrics as those presented for judging standard marketing email performance.

- **Lead scoring**
  Most types of behavior and interaction data can be used to create lead-scoring rules. Lead scoring can also use many other types of information beyond behavior (such as demographics, event attendance, and much more).

- **Campaign automation**
  Behavior and interaction data is used in campaign automation in two ways: to display counts on canvas tiles (such as number of emails or offers that were opened) and as input to triggers (for example, to trigger a follow-up email for all contacts that submitted a landing page).

- **Landing pages**
  Landing pages combine information submitted by the contact with a cookie ID collected by the website behavioral-analysis script to map previously anonymous website visits to an actual contact.

Walkthrough: Create an automated campaign with a landing page

An email campaign that features a landing page touches on nearly every aspect of the behavioral-analysis system. In this walkthrough you're going to set up a fully featured landing page and then include the page in a simple automated campaign and observe how these features present and make use of behavioral-analysis data.

Prerequisites

To complete this walkthrough you must have the following elements available:

- A fictional client company for whom you'll prepare the automated campaign, such as the one you created in "Step 1: Create a fictional client company", page 12.

- A marketing list including at least two contacts, each of which is configured with your email address (such as the one you created in. "Step 3: Create a static marketing list", page 21 .All contacts and the list itself must belong to the fictional client company.

- A basic email template with associated plug-ins and all other basic requirements, such as the one you created in "Walkthrough 2: Create, send and monitor a marketing email", page 32 .This template must belong to the fictional client company.

Step 1: Create a website behavioral-analysis script
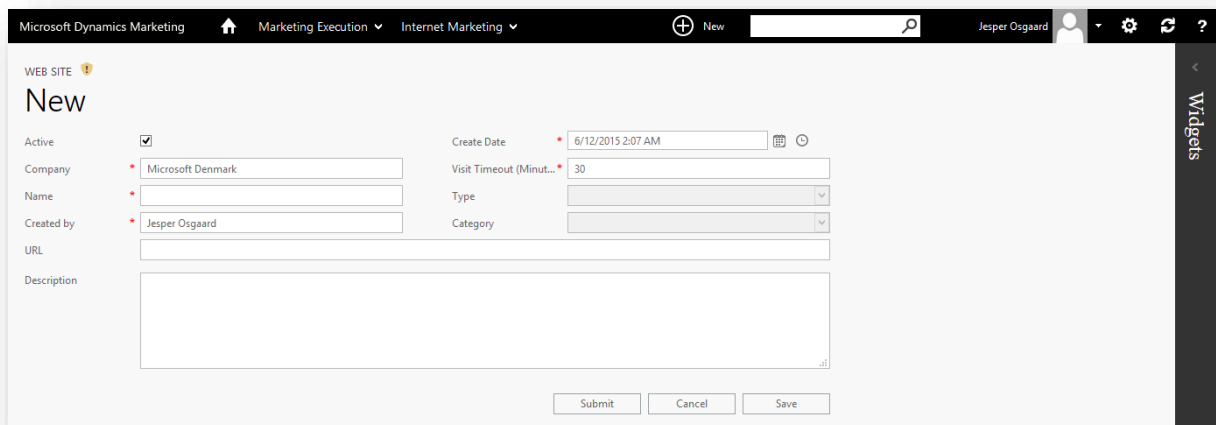
In Dynamics Marketing, a "website" is a simple database record that associates a given website with a website ID, which is encoded into a behavioral-analysis script generated by the feature. When included on a webpage, the script will record visits, associate each visit with the script's website ID, and report activity back to Dynamics Marketing. Note that the actual website's URL isn't part of this equation, so if you include the same script on multiple domains, all visitors will be registered in Dynamics Marketing as being on the same "website." Similarly, you might use two different Dynamics Marketing website scripts in two different sections of a single, large domain, thus registering the two sections as being different "websites" in Dynamics Marketing.

Website behavioral-analysis scripts are important for landing pages, too. Here, they are responsible for linking a contact's actual identity (which becomes known when the contact submits the landing-page form) to the anonymous ID used by the script.

1. Go to **Marketing Execution** > **Internet Marketing** > **Web Sites** to open the **Web Sites** list page.
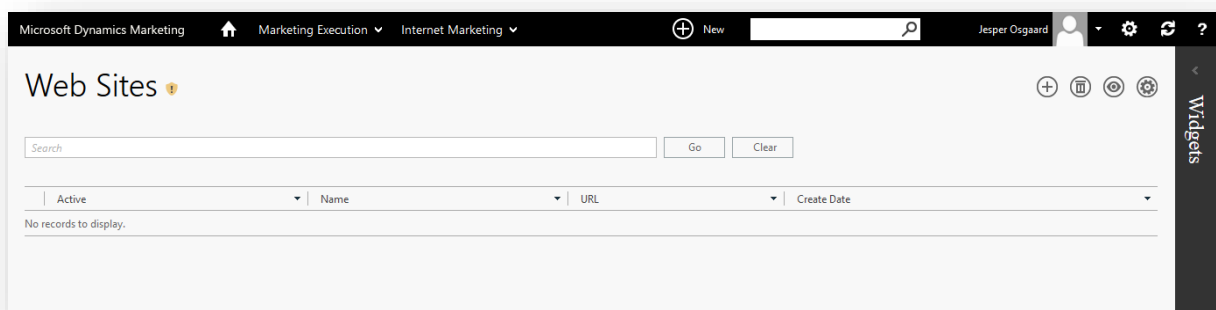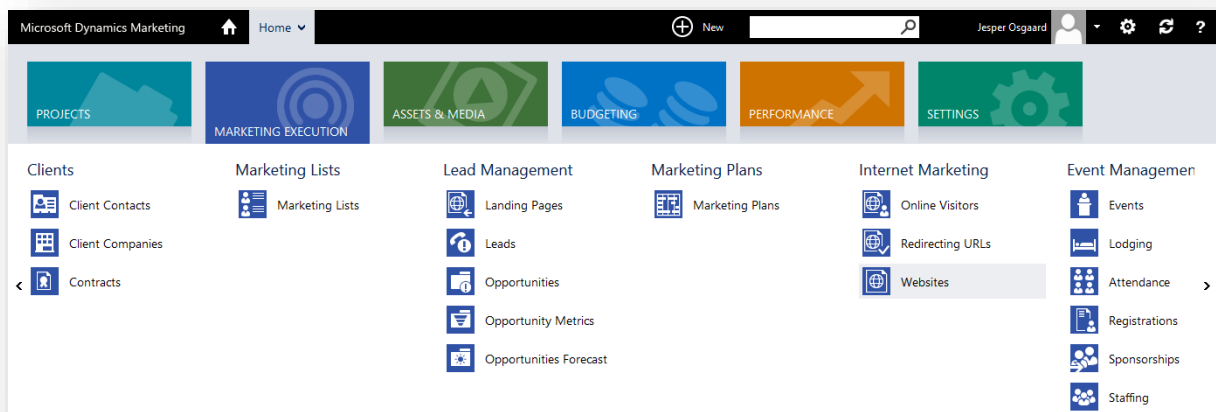
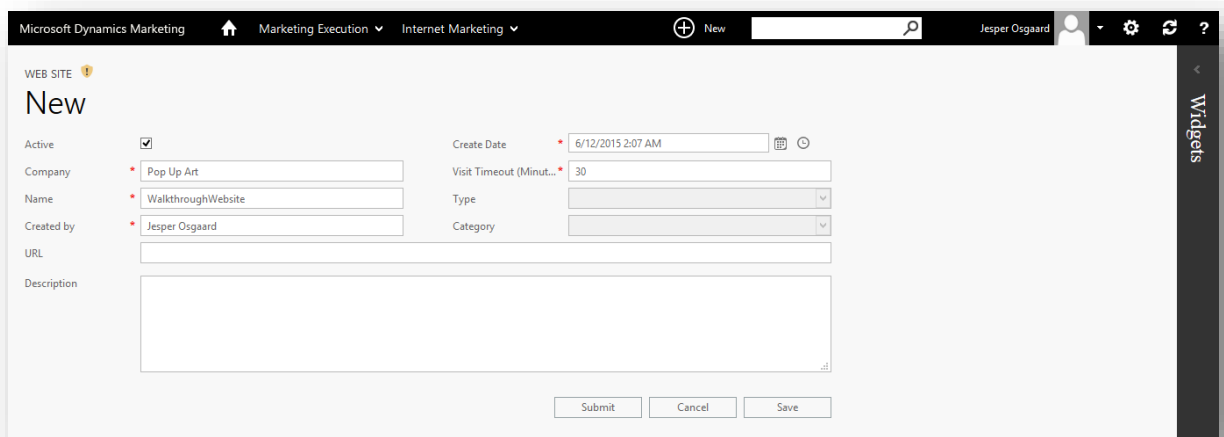2. Select the **New** button ⊕ from the toolbar on the **Web Sites** list page. A new **Web Site** maintenance page opens.

3. Fill out the form on the **Web Site** maintenance page. At a minimum, make the following settings:

    o **Company**: Set to the name of the fictional client company that you created for this walkthrough (see also the prerequisites).

    o **Name**: This is the name by which the website will be identified within Dynamics Marketing. Choose a descriptive name that you will recognize later as being part of this exercise (for example, "WalkthroughWebsite").

   For more information about these and other settings on this page, see the online help topic Create a website behavioral-analysis script.

4. Choose the **Save** button to save your settings while keeping the maintenance page open. The page reloads, now showing the generated script. You must copy and paste this script onto any webpage that you want to monitor as being part of this website. You can also associate this record directly with any landing page in Dynamics Marketing to include the script on that page (you'll do this later).

Step 2: Initialize a campaign

Campaigns are a central element of Dynamics Marketing. You will use them to collect all kinds of information about your marketing campaigns, record responses, compute returns and more. The feature also enables you to create automated email campaigns, as you will soon see in this walkthrough. In this step, you'll set up a campaign workflow which, when finished, will look something like this:


The workflow begins on the left side with a **marketing list**, then sends an email with a linked landing page to each member of that list.

The **landing page** is an online form that invites contacts to sign up for an offer (for example, a whitepaper download).

Then a **trigger** waits for contacts to submit the landing page form; each time a contact submits the form, the trigger passes that contact to the last tile, which is a follow-up email (containing, for example, a link to the promised whitepaper).

In this step, you'll set up the basic workflow. In the remaining steps of this walkthrough, you'll configure each tile and then test the result.

1. Go to **Marketing Execution** > **Campaign Management** > **Campaigns** to open the **Campaigns** list page or calendar.
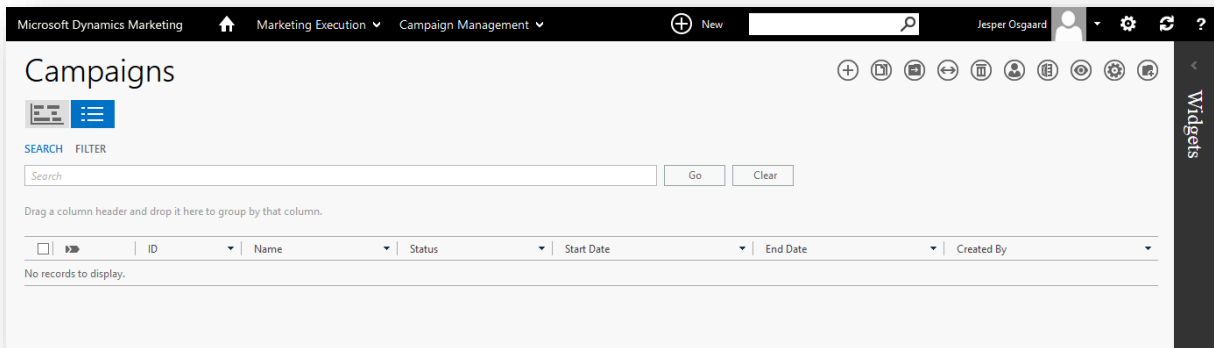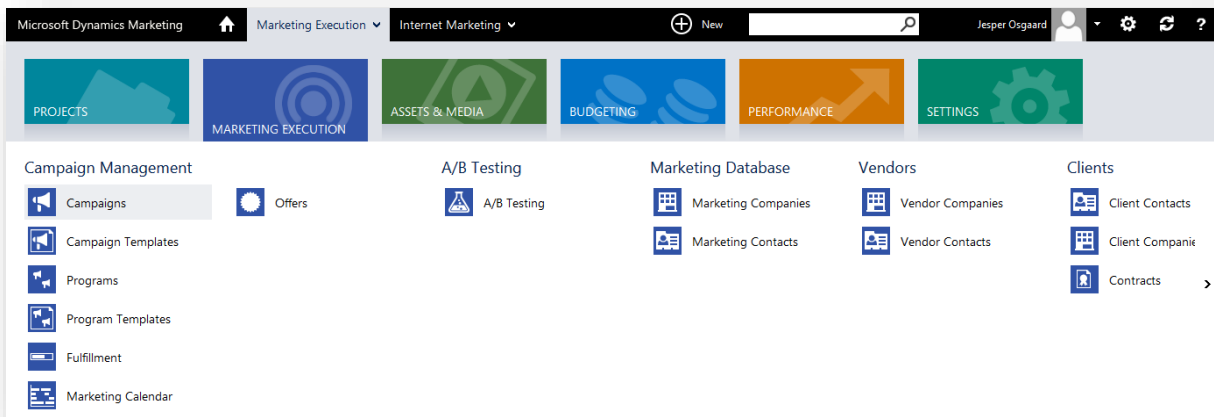
Dynamics Marketing remembers the view (list or calendar) you used last time you were here. If you're looking at the calendar, choose the **Summary** ▤ top-level tab to go to the list.

2. Select the **New** button ⊕ from the toolbar on the **Campaigns** list page to open the **Template** page
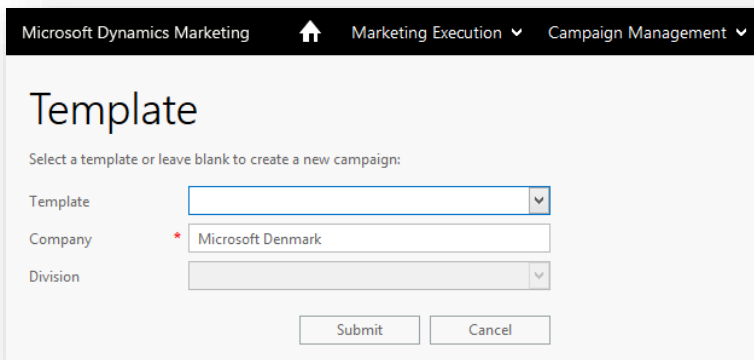
3. Make the following settings:

   o **Template**: Leave this blank.

   o **Company**: Choose the same fictional client company that you have been using so far.

o **Division**: Leave this blank.

4. Choose **Submit** to continue to the **Campaign** maintenance page for your new campaign.

5. Make the following settings:

o **Name**: This is the name by which the campaign will be identified in Dynamics Marketing. Choose a descriptive name that you and others will recognize later (for example, "WalkthroughCampaign").

o **Start Date** and **End Date**: These are the dates during which your campaign will be active and the automation steps will run. Set the **Start Date** to yesterday and allow the campaign to run for a week.

6. Choose **Save** to save your campaign, but keep it open.

7. Select the **Automation** top-level tab to go to the campaign-automation canvas

8. Drag a **Static** marketing list tile from the **Activities** column to the first position on the canvas (where it says "Add marketing list").

9. Drag an **Email** action-type tile ✉ from the **Activities** column and drop it to the right of the list tile.

10. Drag a **Landing Page** tile ⊕ from the **Activities** column to the right of the new **Email** tile.
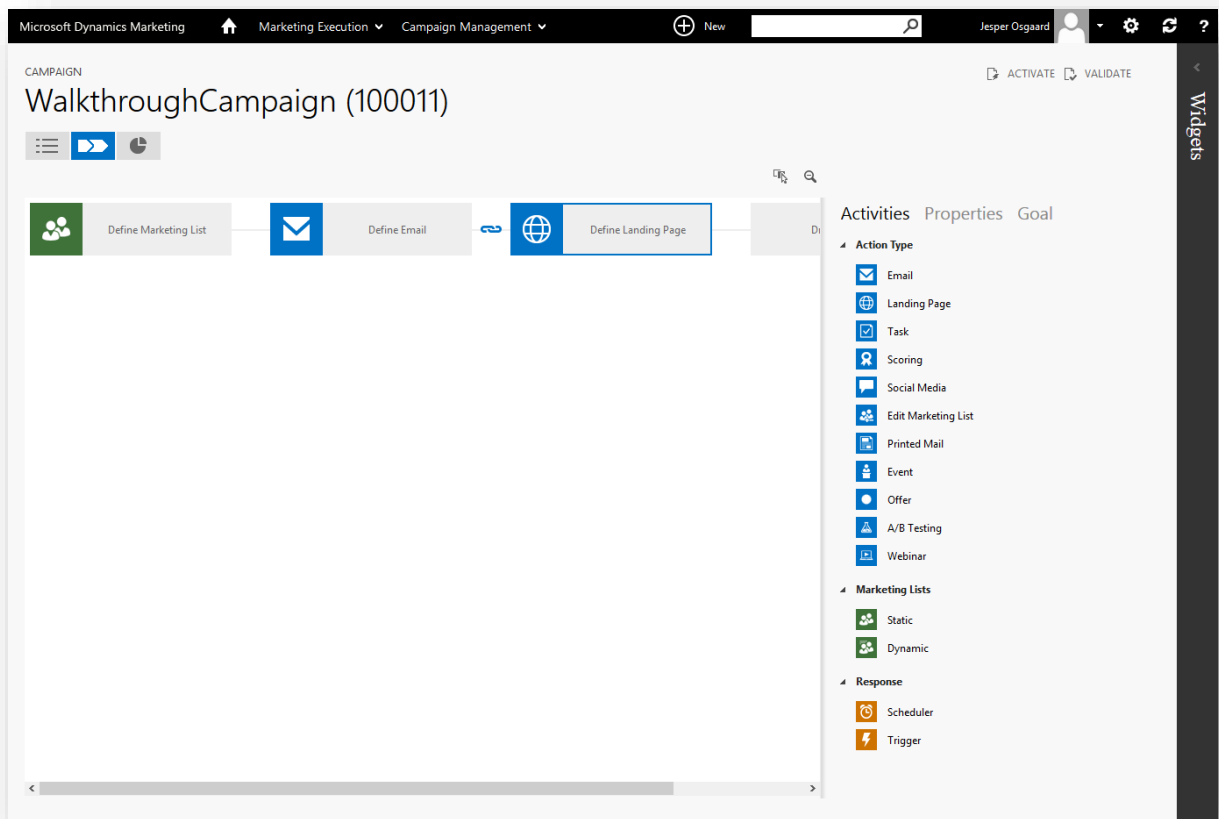
Note the link icon now shown between the two tiles, indicating that the landing page will be linked in that email.

11. Drag a **Trigger** tile ⚡ from the **Activities** column to the position after the **Landing Page**.

you might want to scroll right to see the paths of the trigger
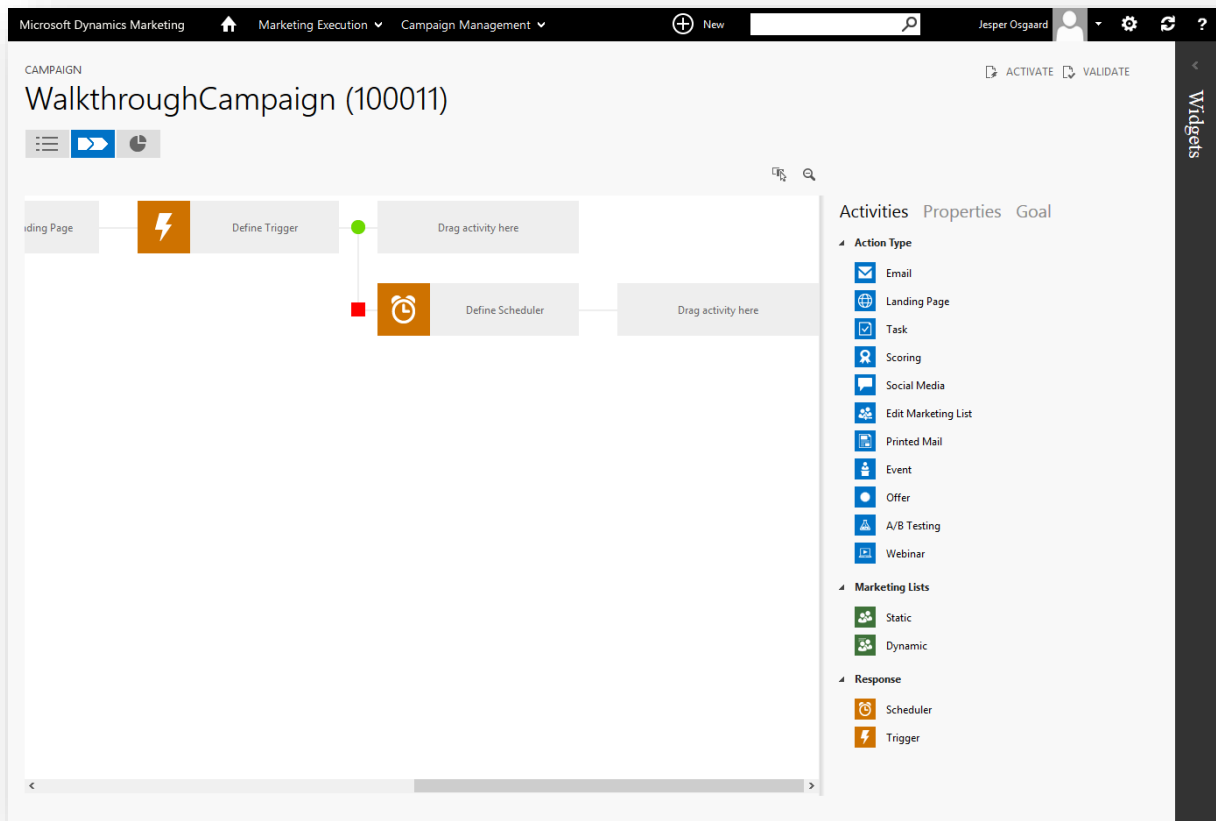
12. Drag an **Email** action-type tile ✉ from the **Activities** column and drop it to the right of the green circle (upper path) of the trigger tile.

13. Optionally zoom out to see smaller tiles using the zoom 🔍 icon
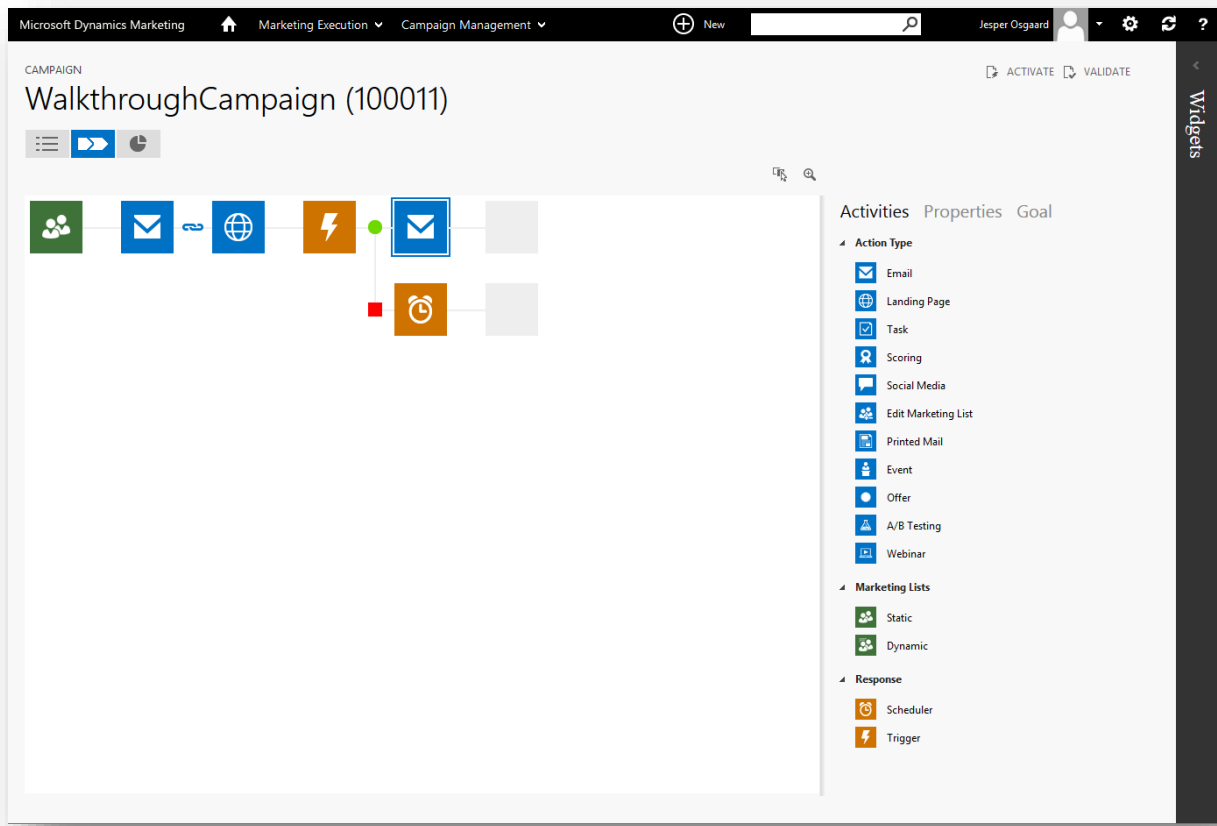
Step 3: Configure the marketing list and sign-up email tiles

All automated campaigns begin with a marketing list, which establishes the group of contacts that will be targeted by the campaigns. In this step, you will choose a target marketing list and create a marketing email to send to that list as part of the campaign.

1. While still working in your new campaign, double-click the **Static** tile 👥 from your workflow to open its **Properties** in the right column.
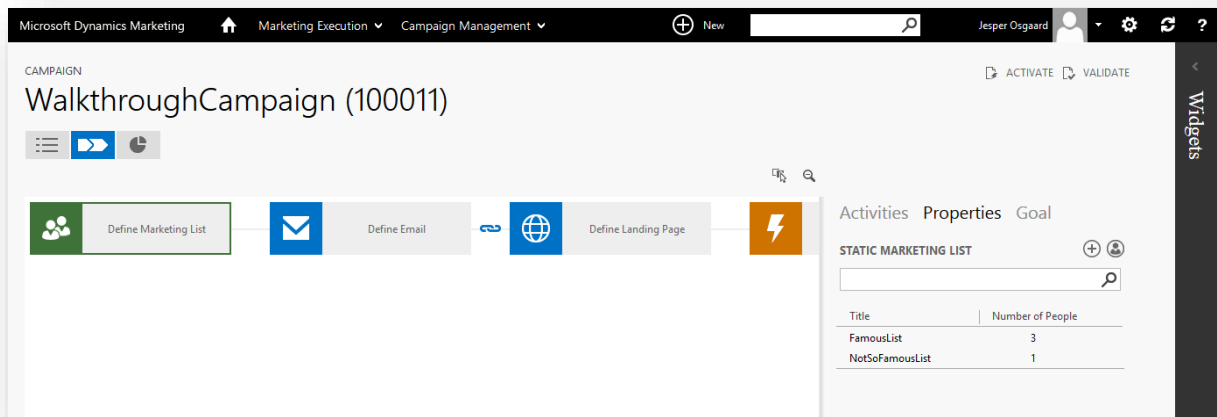
Here you'll see a list of static marketing lists that are associated with the same company as your campaign.

2. Choose the marketing list that you created in "Step 3: Create a static marketing list", page 21 and then choose the **Select** button to apply that list to the tile.
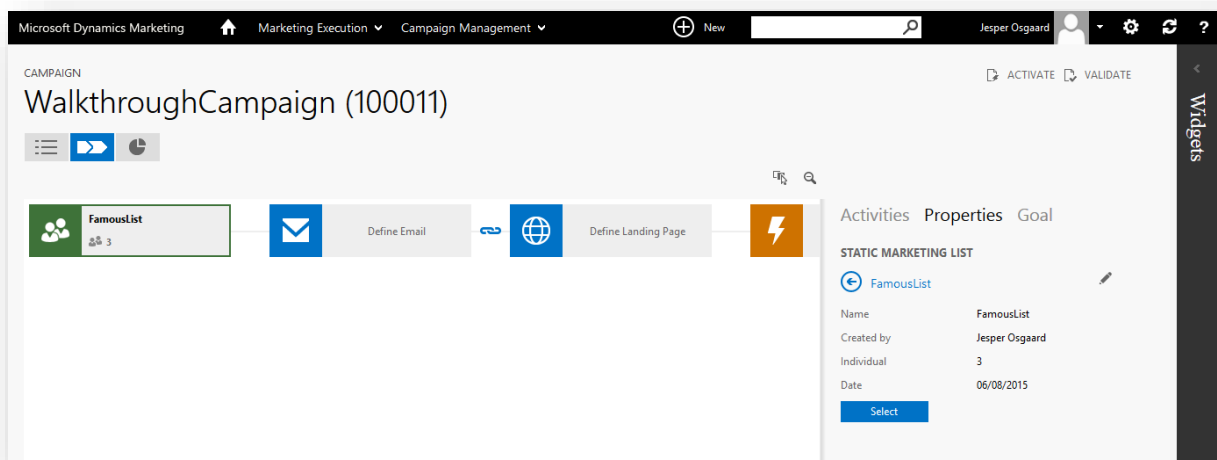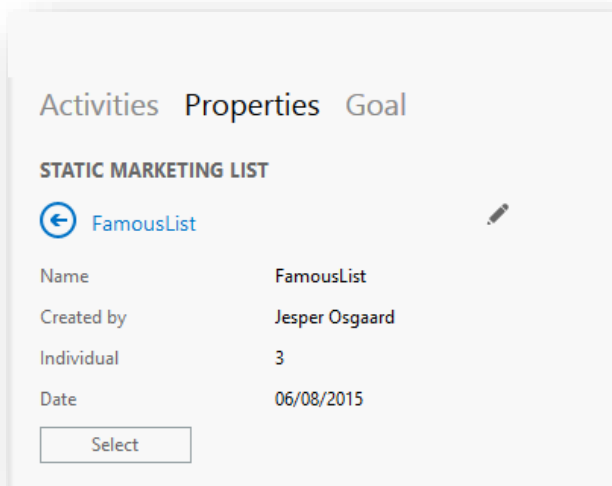
Note that the tile updates to show the selected list name and the number of members of that list.
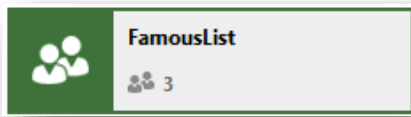
3. Double-click the **Email** tile from your workflow to open its **Properties**.
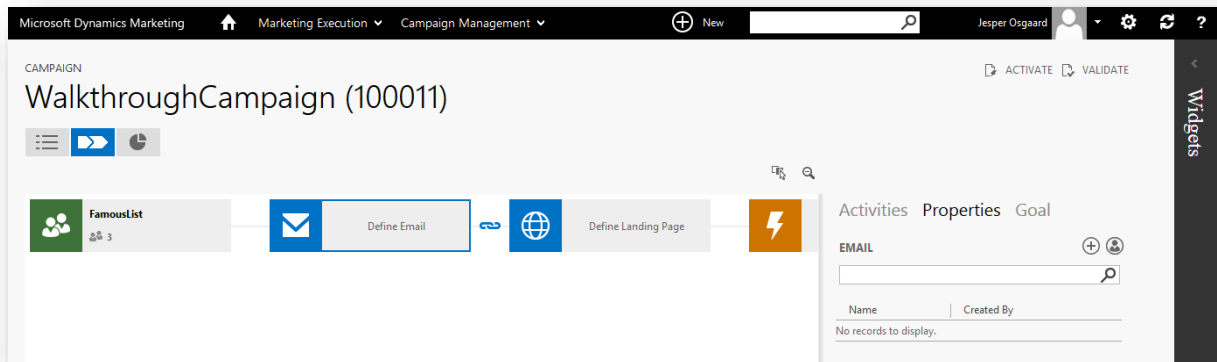
4. Choose the **New** button ⊕ in the **Properties** area. A fly-out slides open, showing the **Template** settings.
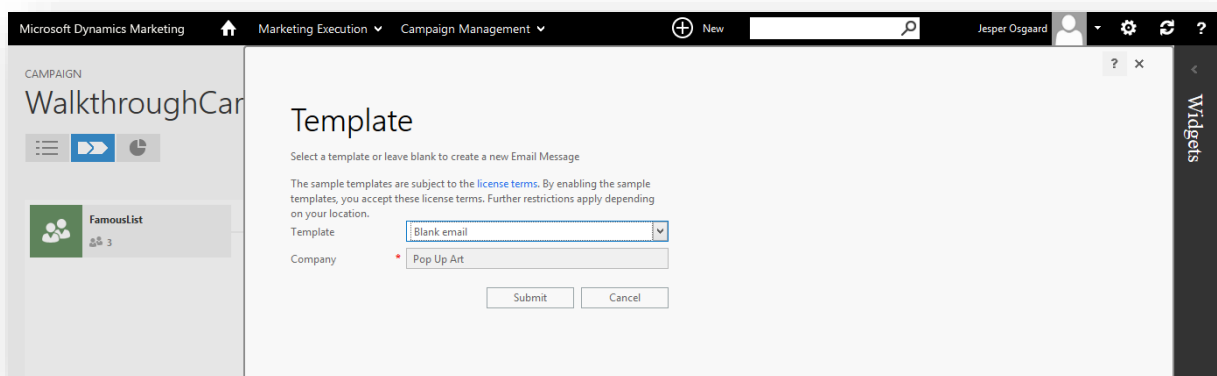
5. Choose the template that you created in "Walkthrough 2: Create, send and monitor a marketing email", page 32.
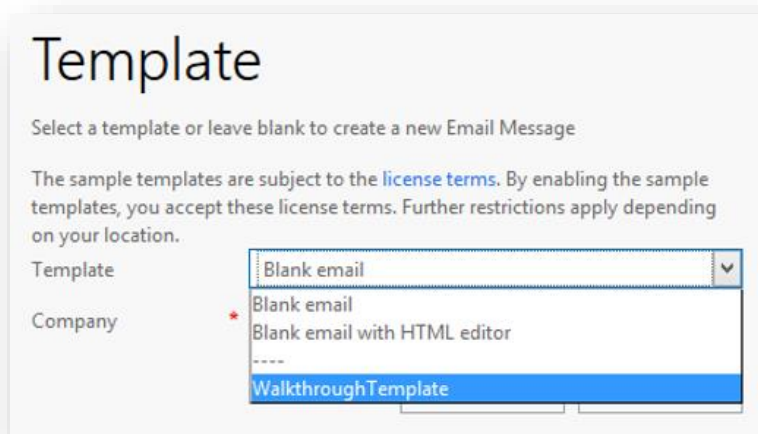
Note that the **Company** is read-only here and preset to match the company for which you are creating the campaign.
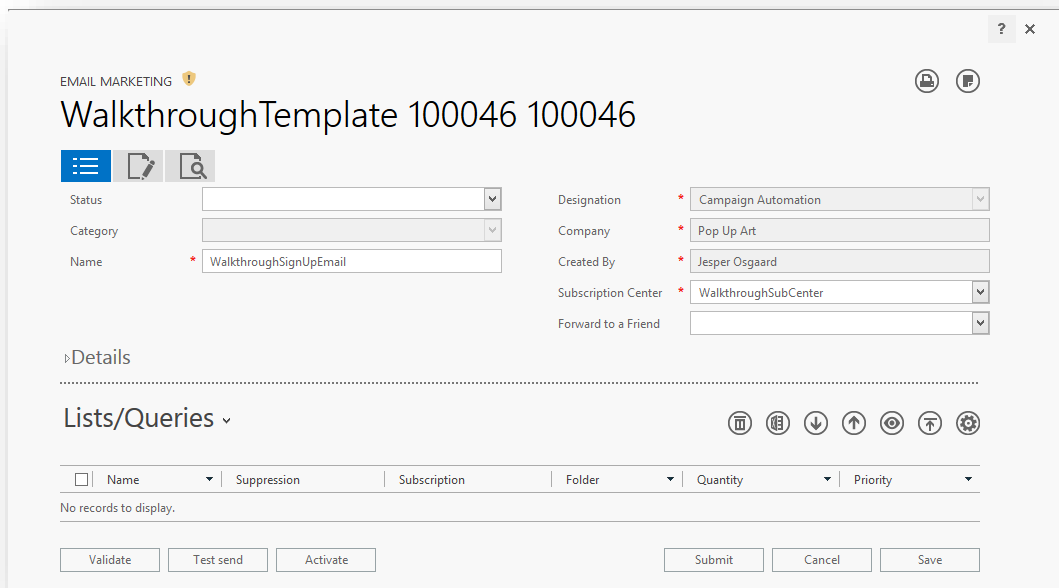
6. Choose **Submit** to go on to the **Email Marketing** maintenance page, which shows its design view.
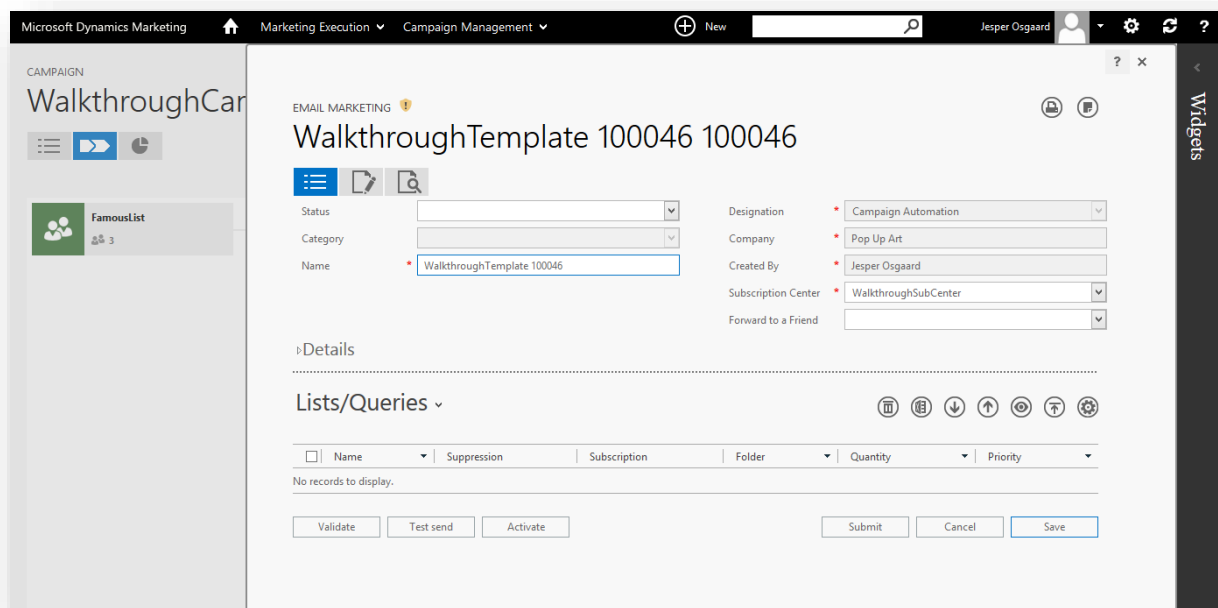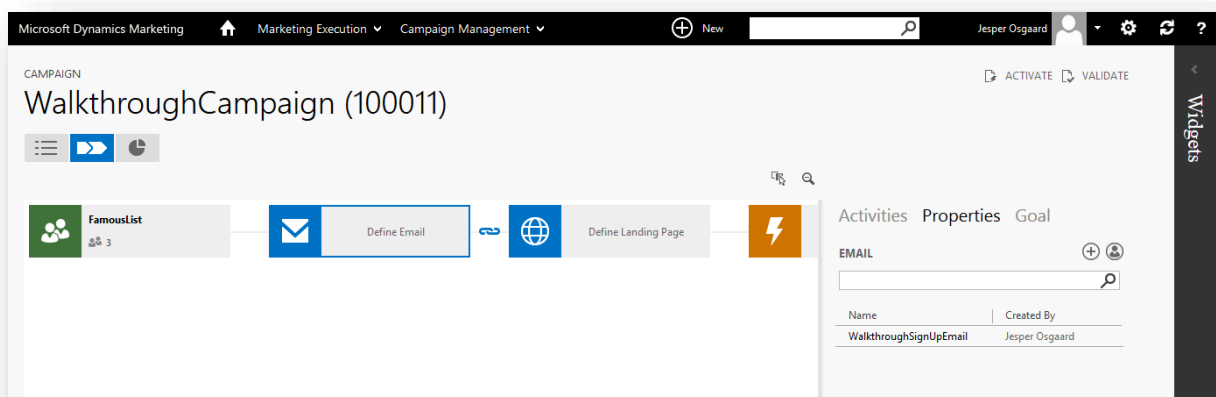
You should see the content here that you established for the template from the email walkthrough.

7. If not chosen already choose the **Summary** top-level tab here to go to the summary settings for your new mail. Note that many of the settings here have been inherited from the template. Enter/note the following values:

    o   **Name**: Enter a descriptive name of the mail so you will recognize it later, for example, "WalkthroughSignUpEmail"

    o   **Designation**: Note that this is set to "Campaign Automation" and is read only (because we are working from the campaign-automation canvas itself).
    All marketing emails must have this designation in order to be used with the campaign canvas.
    Because the send list and send actions will be controlled by the campaign automation, emails with this

designation do not allow you to add lists to their local **Lists/Queries** settings (there is no ⊕ button) and do not include a **Send** button.

8. Choose the **Submit** button at the bottom of the fly-out. Your new email design is saved and the fly-out closes.

You return to the canvas with the **Properties** tab open in the right column. You should now see your newly created email design listed here by the name that you entered.

9. Choose the new design from the list to open a small preview of the message and then choose **Select** to apply that message design to the current tile.
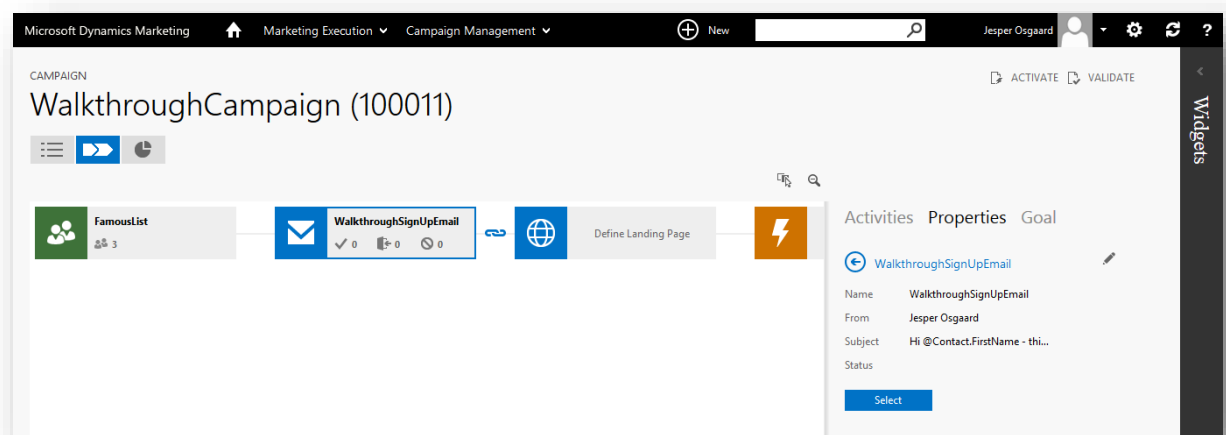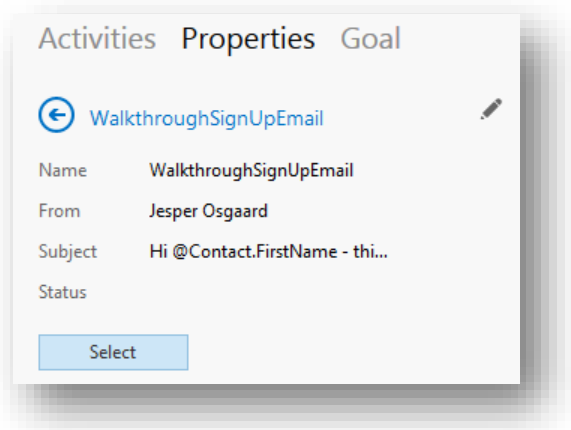
10. Your new email tile should now show the name you assigned to your email design together with some statistics.

11. Choose **Activities** in the right column to go back to the **Activities** list, but keep your campaign open.

Step 4: Configure the landing page

A landing page is an online form in which new and existing contacts can enter contact details to sign up for mailing lists, offers, events and more. By including a landing page in a campaign and linking to it from a campaign email, you can encourage the targeted contacts to fill it out and then program the automated campaign to react when contacts submit the form.

1. Double-click the **Landing Page** tile from your workflow to open its **Properties** in the right column.
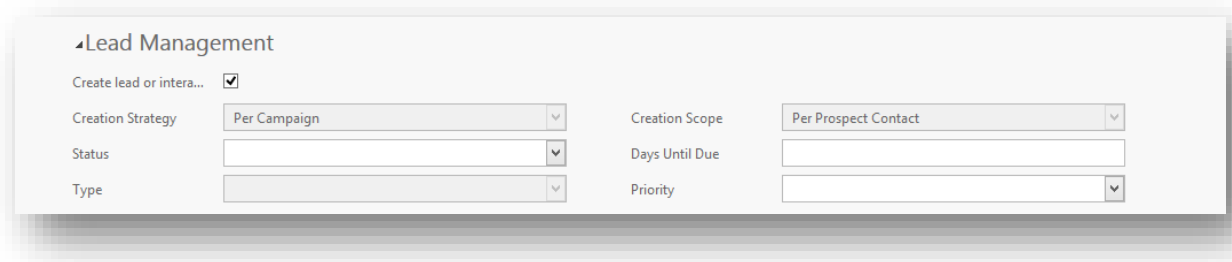
2. Select the **New** button ⊕ from the toolbar in the **Properties** column to open a fly-out for creating a new landing page.

3. Fill out the **Landing Page** form shown here. At minimum, make the following settings:

   o **Name**: This is the name by which the landing page will be identified within Dynamics Marketing. Choose a descriptive name that you will recognize later as being part of this exercise (for example, "WalkthroughLandingPage").

   o **Web Site**: Choose the name of the website behavioral-analysis script that you made earlier in this walkthrough (if you followed the example to the point it is "WalkthroughWebsite").

   The result of this setting is that the behavioral-analysis script will be included on the landing page. This is important because this enables Dynamics Marketing to record the landing-page visit and also makes it possible to link the registered contact to any existing anonymous website-visit data.

   o **Company**: Note that this is pre-set to the same fictional client company that you chose for the campaign and is read-only because you are already working inside the campaign.

   o **Campaign**: Note that this is pre-set to the current campaign and is likewise read-only.

   o **Lead Management** > **Create lead or interaction**: Expand the **Lead Management** heading if it is not already open and make sure this checkbox is marked (it should be by default).

This enables landing page interactions to create new leads and/or increase the lead score of contacts who use it. Less obviously, it also makes it possible to use landing page interactions as a trigger in campaign automation, which is what you want to do in this walkthrough.

For more information about these and other settings on this page, see the online help topic Create and customize landing pages.

Note

Many organizations prefer to embed the landing page (which is generated and hosted by Dynamics Marketing) onto their own website using an iframe.

This is fine, but the behavioral-analysis script linked in the landing-page configuration will _not_ work when the page is imported using an iframe.

In this case, you must place the behavioral-analysis script manually onto the same local page that is also hosting the iframe.

4. Choose the **Save** button to save your settings while keeping the fly-out open.

The fly-out reloads, now showing the related-information tabs (which you won't use right now), and also generates the landing page itself (and a link to it).

5. Expand the **Content** heading if it is not already open and note the link shown here.

6. Choose this link to preview your landing page in a new browser tab.

You should see a plain page with a fairly long form. This is good enough for now, but if you like you can explore the various settings under the **Content** heading to experiment with the layout and content of the page. (For example, on a real landing page you should use the smallest possible number of fields because large forms intimidate users and lower response rates.). Dismiss (close) the preview page.

7. Choose the **Submit** button at the bottom of fly-out. Your new landing page is saved and the fly-out closes. You return to the canvas with the **Properties** tab open in the right column.
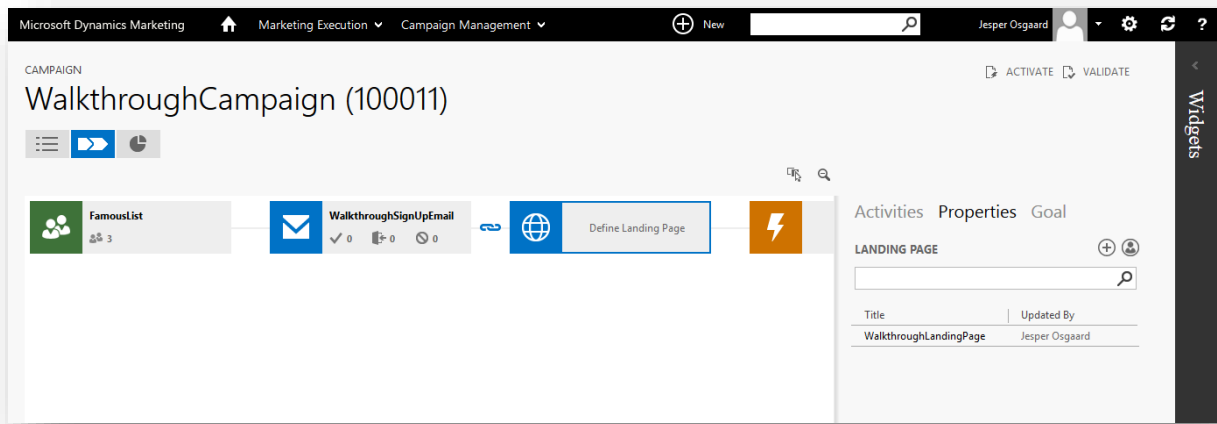
8. As with your email design, choose your new landing page from the list and then choose **Select** to apply it to the current tile.
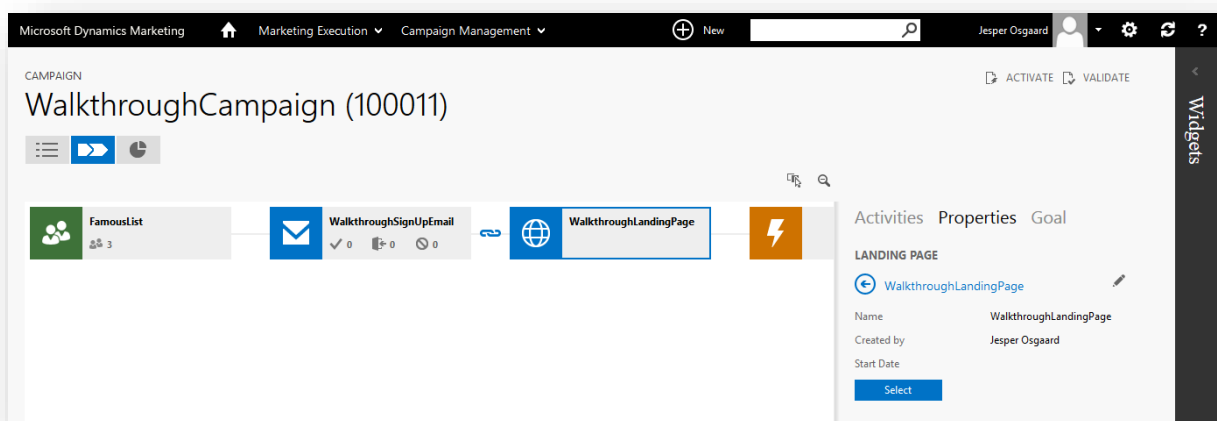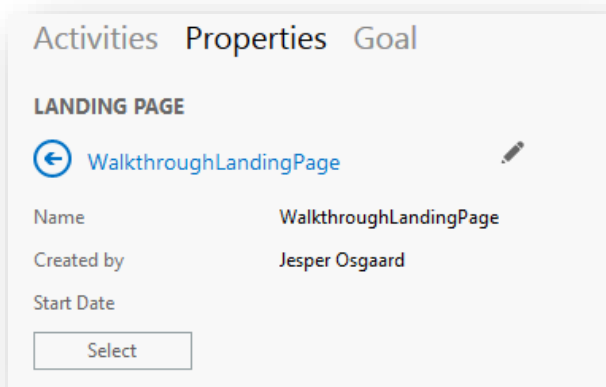
9. Your new landing page tile should now show the name you assigned.
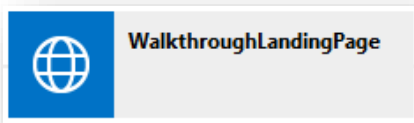
10. Double click on the email message to which your new landing page is linked. As before, the **Properties** tab opens in the right column, showing information about your message. Choose the **Full Editor** button ✎ here to open the message design in the fly-out.
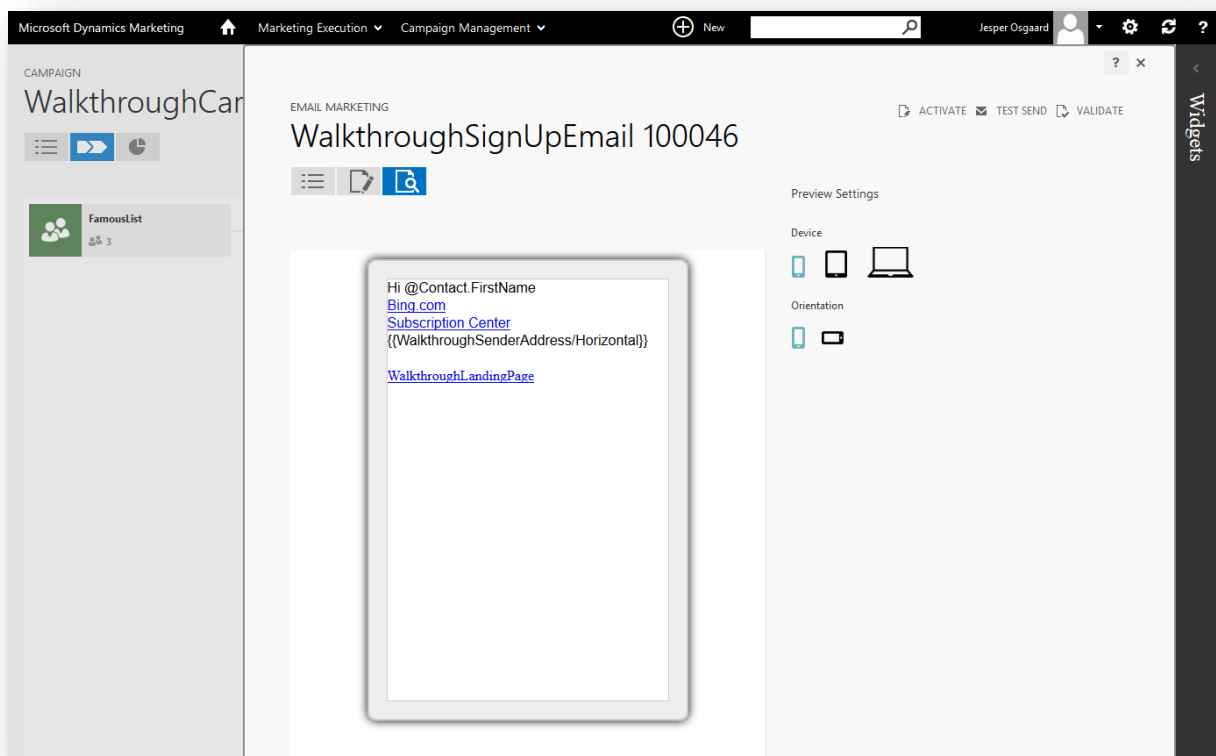
Note that the content of your email message (automatically) has updated to include the landing-page link at the bottom.
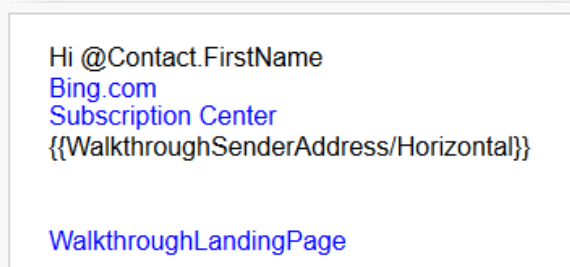
Tip

The email editor also provides controls for adding landing-page links if you prefer to have more control over where the link is placed, but this design will work for now. Note also that the name you assigned to the landing page becomes the link text here; consider this when choosing your landing page names in the future.

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11. Choose the **Close** button to close the fly-out and then choose **Activities** in the right column to go back to the **Activities** list, but keep your campaign open.
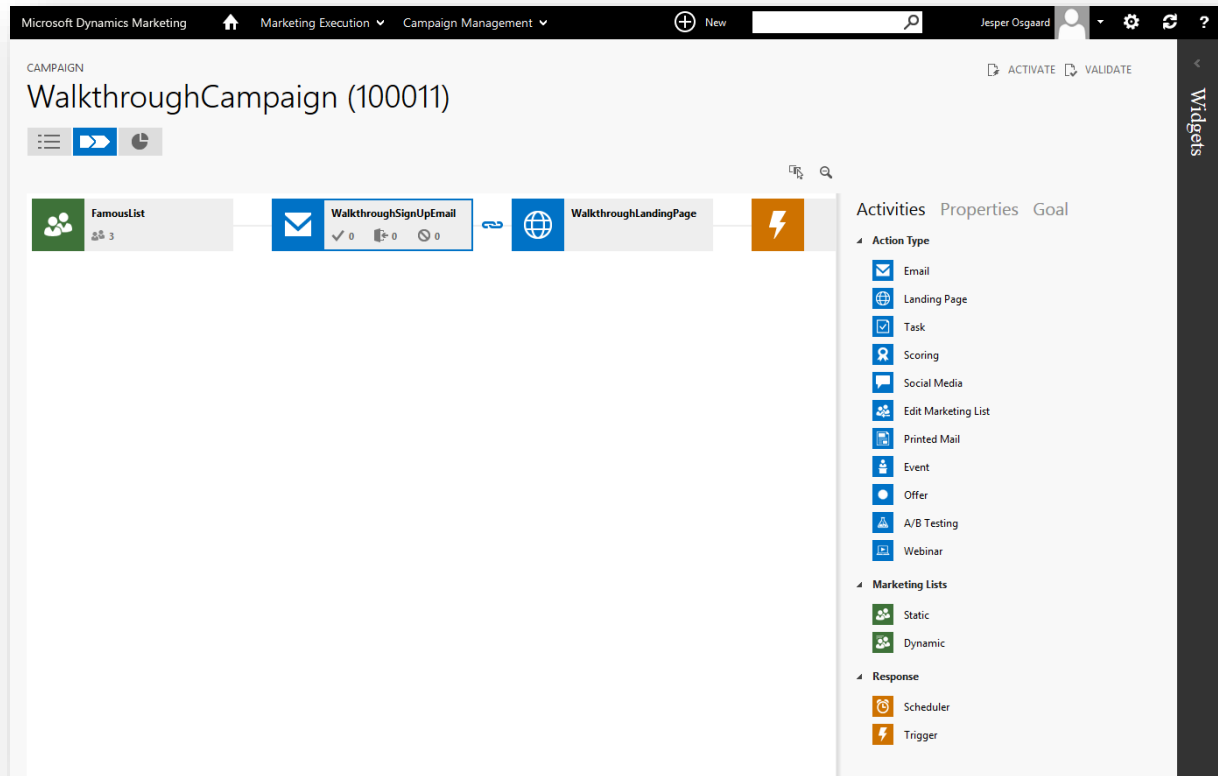
Step 5: Configure the trigger

The trigger adds logic to your automated campaign, enabling it to react differently based on contact interactions and/or other criteria.

1. Double-click the **Trigger** tile from your workflow to open its **Properties** in the right column.
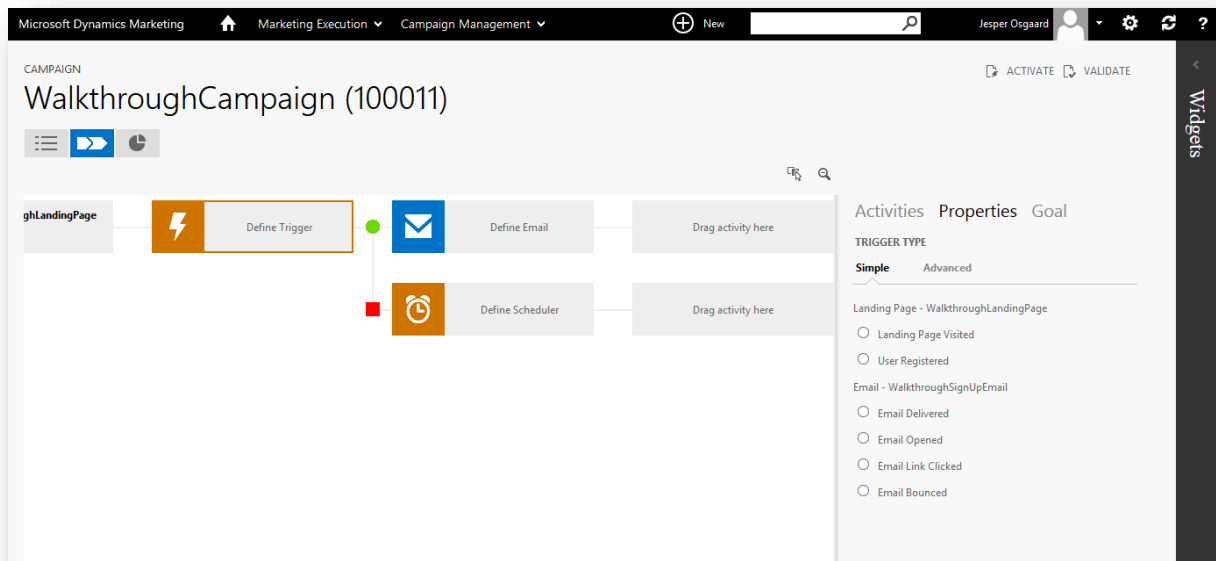
2. Mark the **Landing Page** > **User Registered** radio button.
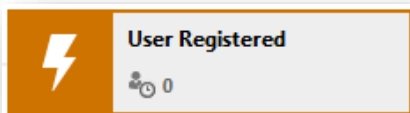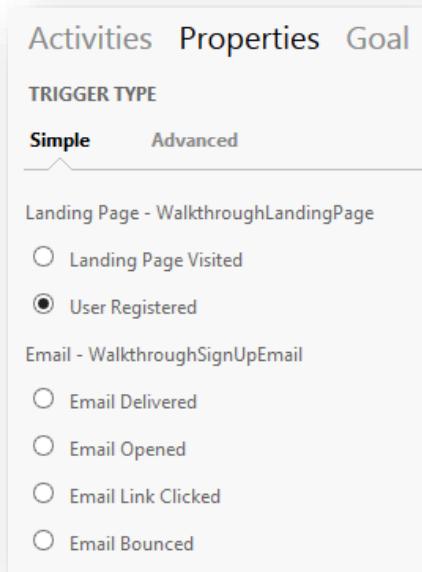
This programs the trigger to react when a contact included in the campaign's marketing list submits the landing page, thus sending that contact along the green (user-registered = true) path. Note also the following:

o The red (false) path of the trigger always includes a **Scheduler** tile. You could use this path to set a time (for example, four days) after which the trigger will stop waiting for landing-page submissions and send all unresponsive contacts down that path (perhaps to receive a follow-up email). In this walkthrough, you'll allow unlimited time to respond and therefore do nothing with the scheduler and negative path.

o People not included in the campaign's marketing list might also submit the form. In this case, Dynamics Marketing will collect the details and create a new contact in its database, but will not otherwise draft this new contact into the campaign, so the trigger will not process this contact, nor will he or she receive the follow-up email.

3. Choose **Activities** in the right column to go back to the **Activities** list, but keep your campaign open.
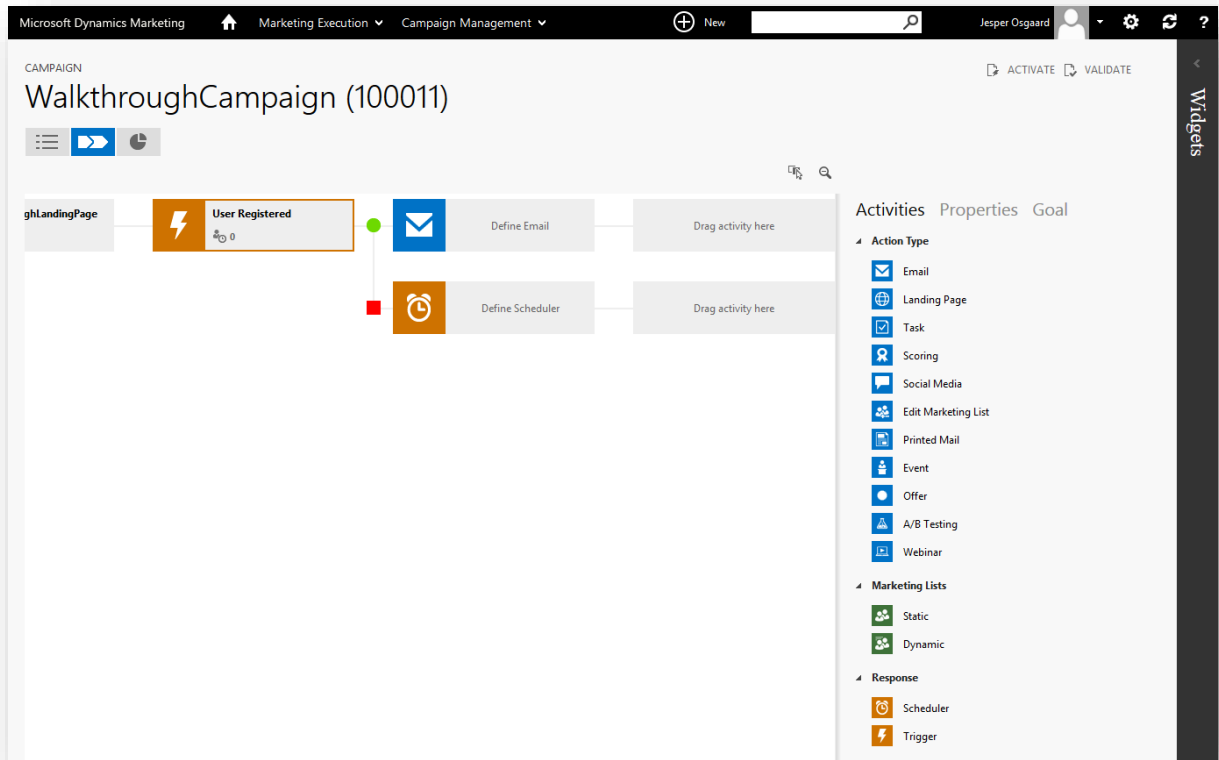
Step 6: Configure the follow-up email message

In this step you'll set up a thank-you email, which will automatically be sent to contacts who submit the landing-page form. In some scenarios, this mail might include a link to a download, a webinar invitation or other incentive designed to encourage contacts to submit the form with a valid email address.

1. Double-click the last **Email** tile from your workflow (to the right of the trigger) to open its **Properties** in the right column.
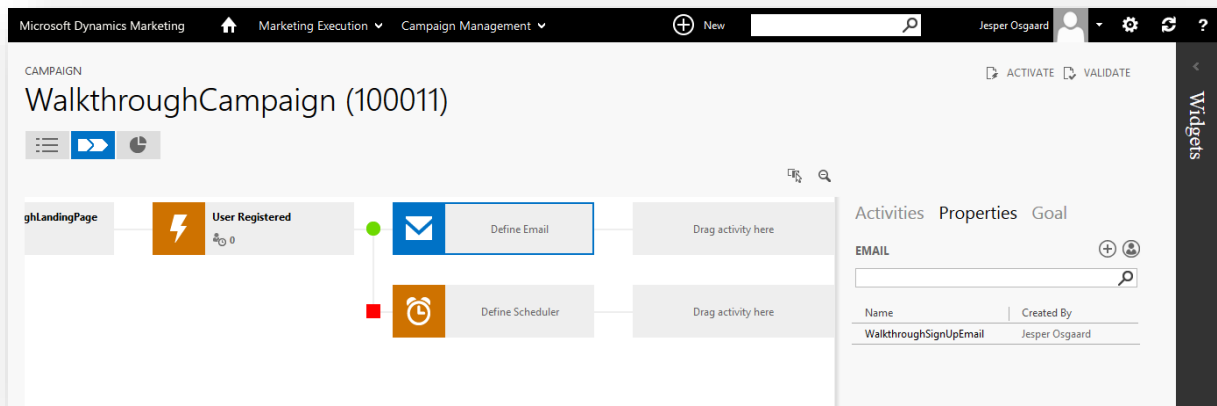
2. Click the plus sign ⊕ to open the fly out and chose at template
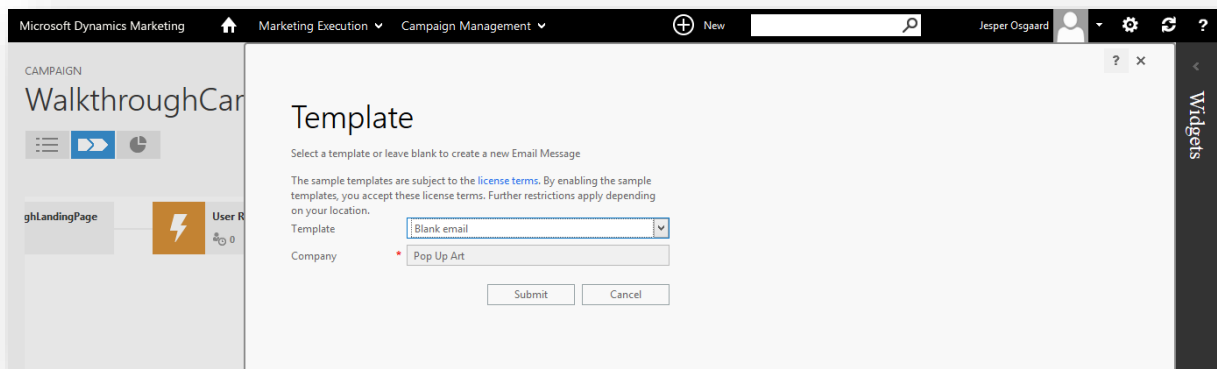
3. Chose the template you created in the section "Walkthrough 2: Create, send and monitor a marketing email", page 32

4. Configure the new mail as follows:

   o On the **Summary** top-level tab , set the **Name** to a descriptive name you will recognize it later, for example, "WalkthroughThankYouEmail"

   o On the **Edit Content** top-level tab , choose **Settings** in the right-hand column and set the **Subject** to a relevant thank you message.
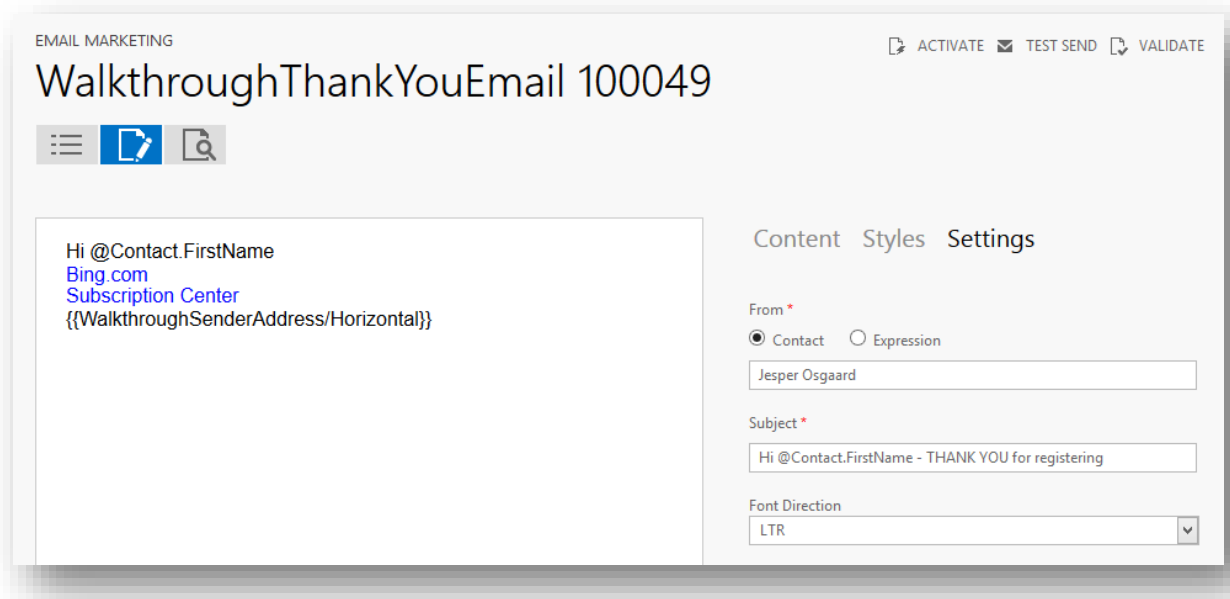
o Also on the **Edit Content** top-level tab , edit the body text to include a simple thank you message (but be sure to keep the subscription center and physical address plug-ins).
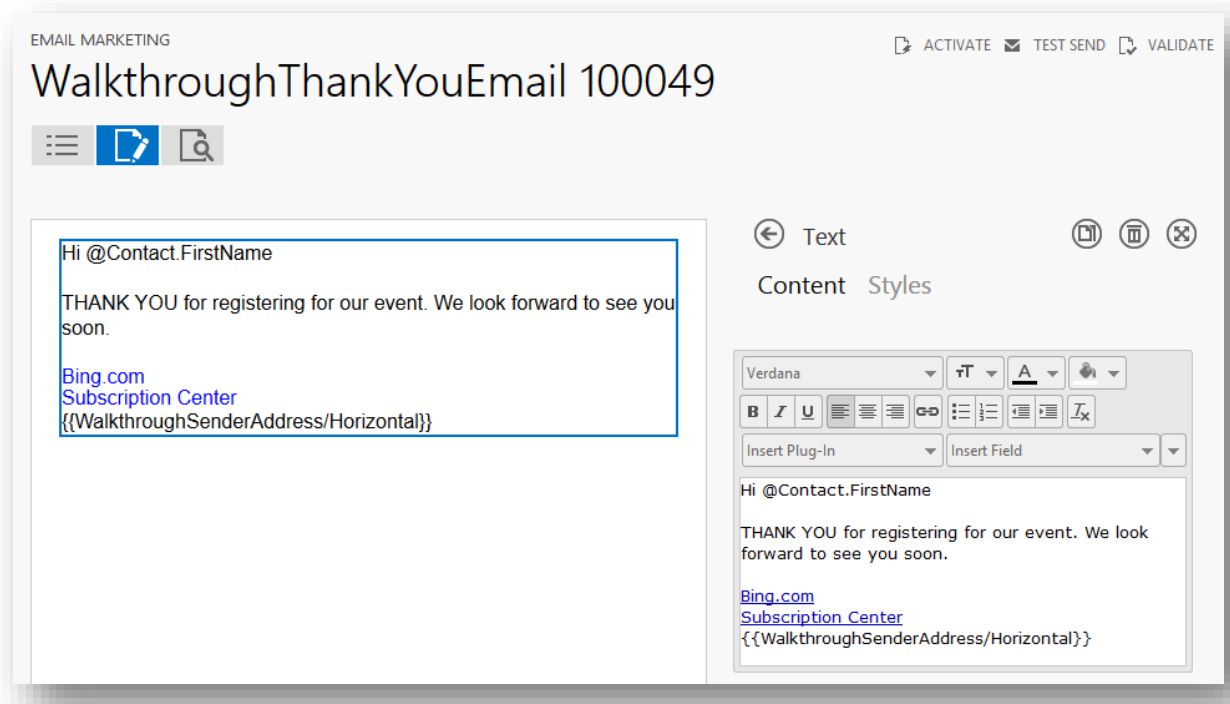
5. As before, save your new message design (on the Summary Page) and apply it to the new email tile.

Step 7: Activate the emails and the campaign

All of the elements of your automated campaign are now in place. All that is left is to activate the emails and then the campaign itself.

1. Test your campaign by selecting the **Validate** button ⟲ VALIDATE in the upper-right corner of the page.
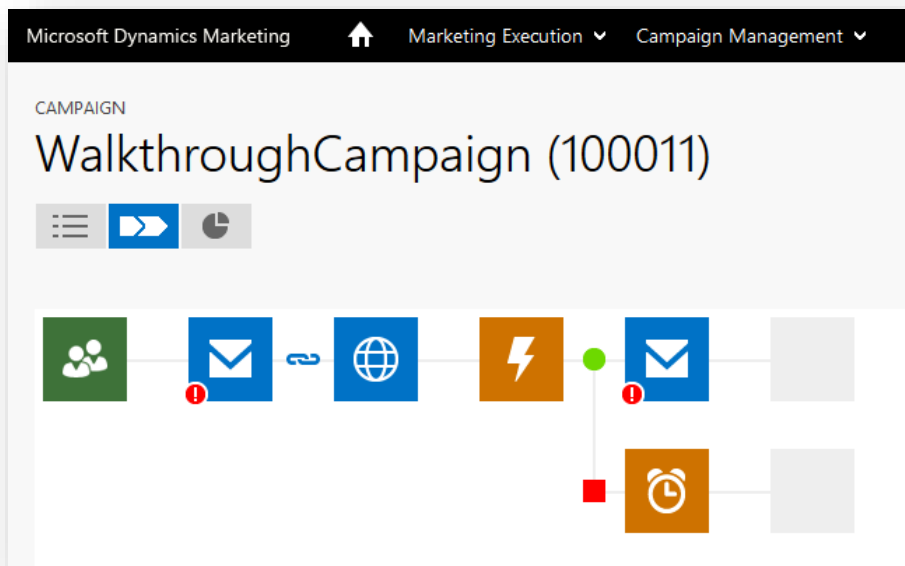
2. You should now see a red exclamation-point icon on each of your email tiles, which indicates that something is wrong with those elements. Hover your mouse pointer over the red icon to see what the problem is.

3. As the message says, your emails need to be activated. Double click on your first email message to go to its **Properties** pane
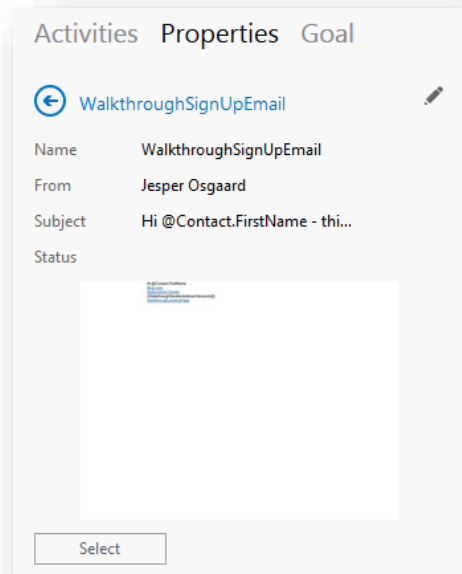
4. Choose the **Full Editor** button ✏ here to open the message design in the fly-out once again.
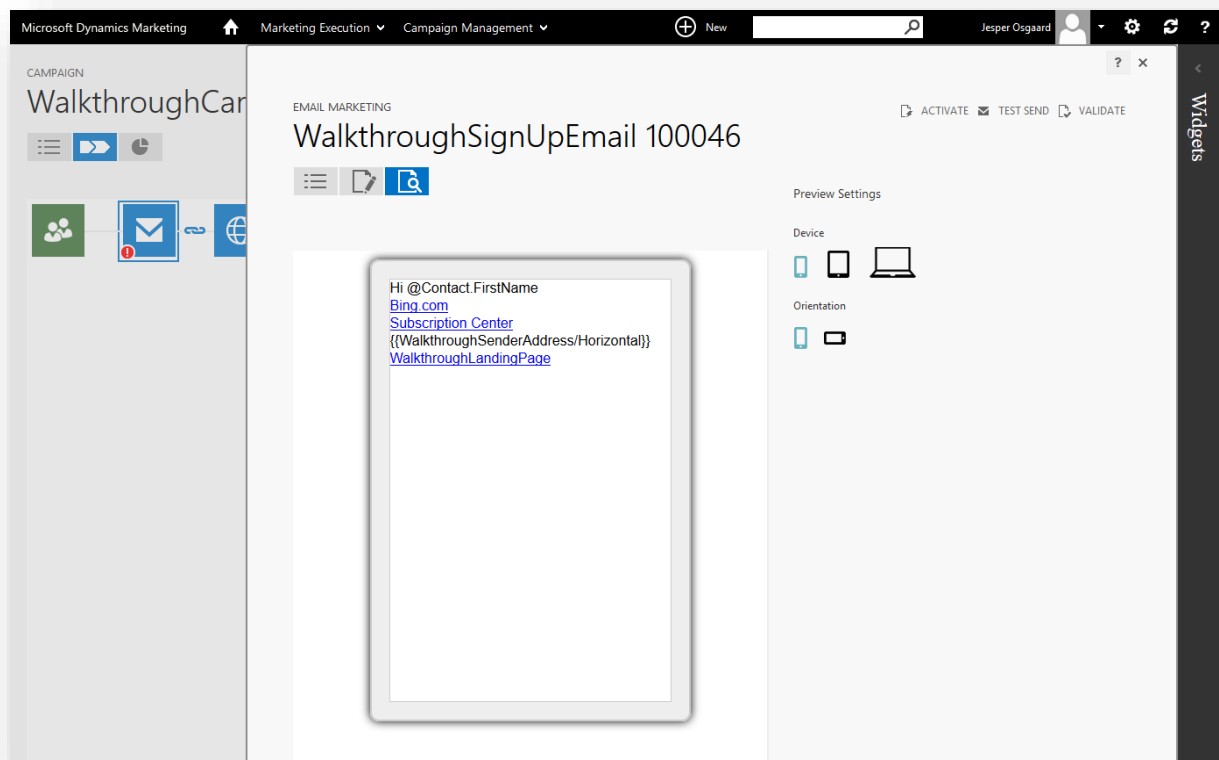
5. Choose the **Activate** button ![ACTIVATE icon] ACTIVATE in the upper right corner.
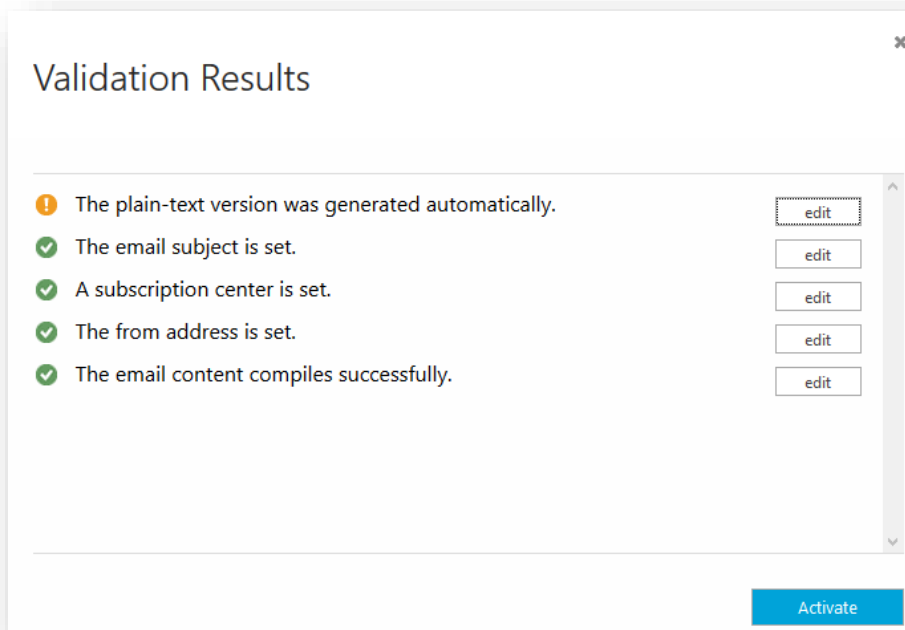
Dynamics Marketing checks your mail for errors and displays the **Validation Results**. Fix any problems reported (for example, by editing the plain-text version – just click Edit to enter the plain-text version editor, and then click Save to exit the editor again) and try again until no errors are shown.
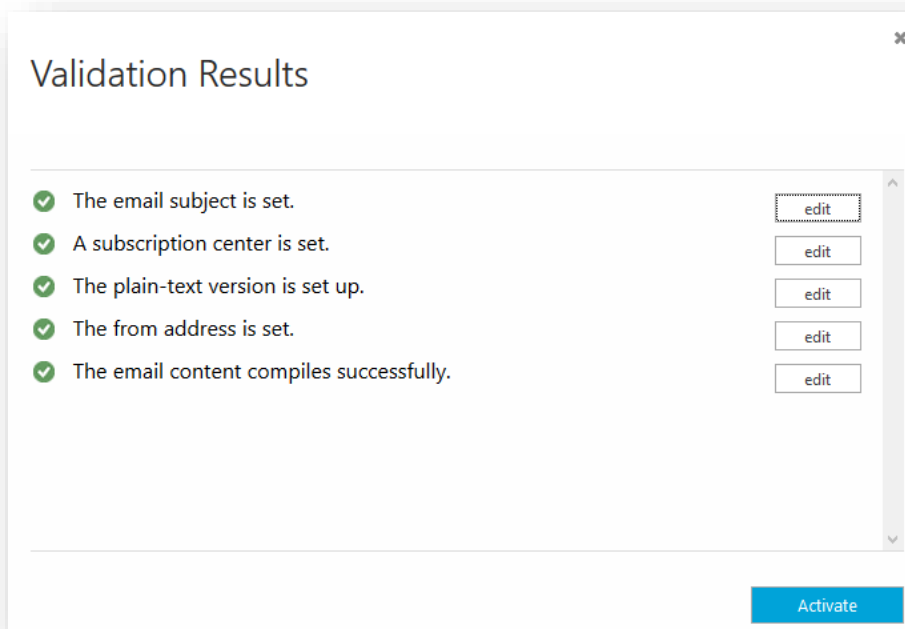
6. Then choose the **Activate** button at the bottom of the **Validation Results** pop-up. The Activate, Test Send, and Validate buttons are now gone from the upper right corner of the editor
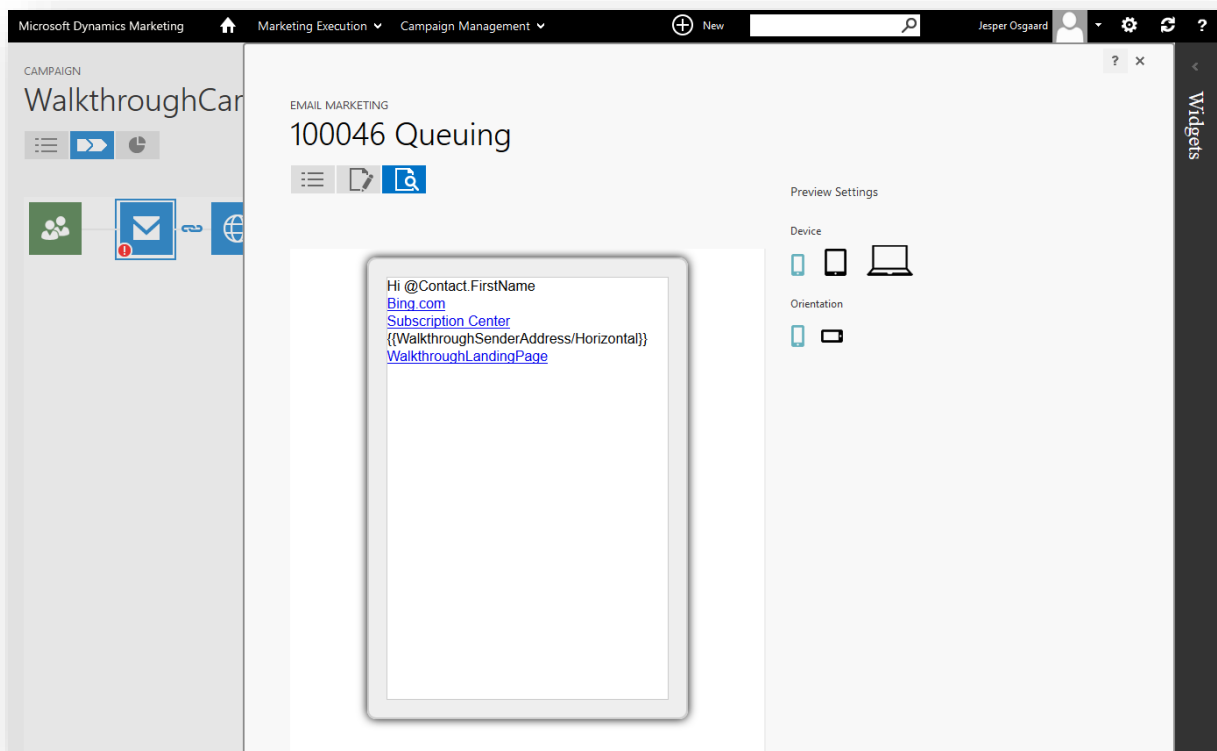
The following now occur behind the scenes:

o The email design is processed and moved from your Dynamics Marketing server to our bulk-mail server.

o The activated version of your design is made available to the campaign canvas.

o The email design remains visible in Dynamics Marketing, but is now locked because the active version is no longer available on the Dynamics Marketing server. (You cannot deactivate the mail again, so if you need to change the design after activating, you must create a copy and work from there.)

7. Choose the **Close** button ✕ to close the fly-out.

8. Repeat the previous steps to activate your thank-you email.

9. Try again to **Validate** the campaign. This time, the red warning badges should disappear from the mail tiles. (If more errors are found, read each error message, fix the problem, and try again.)
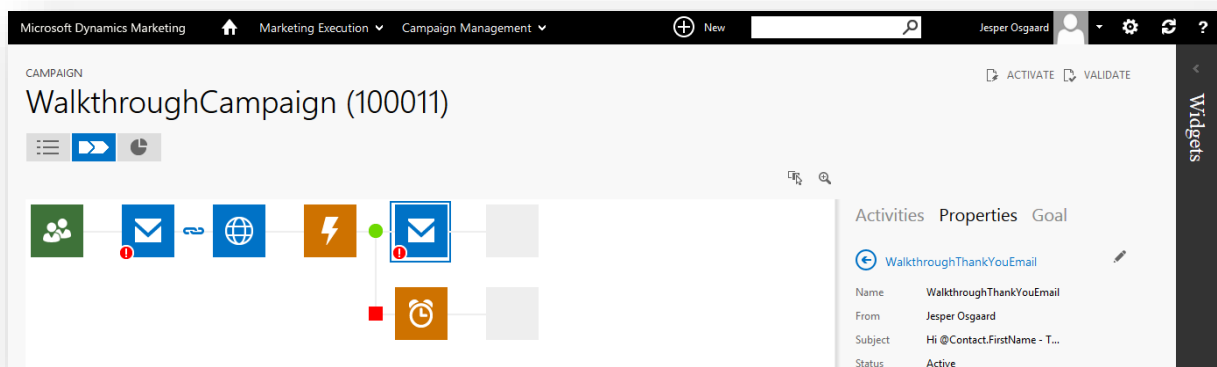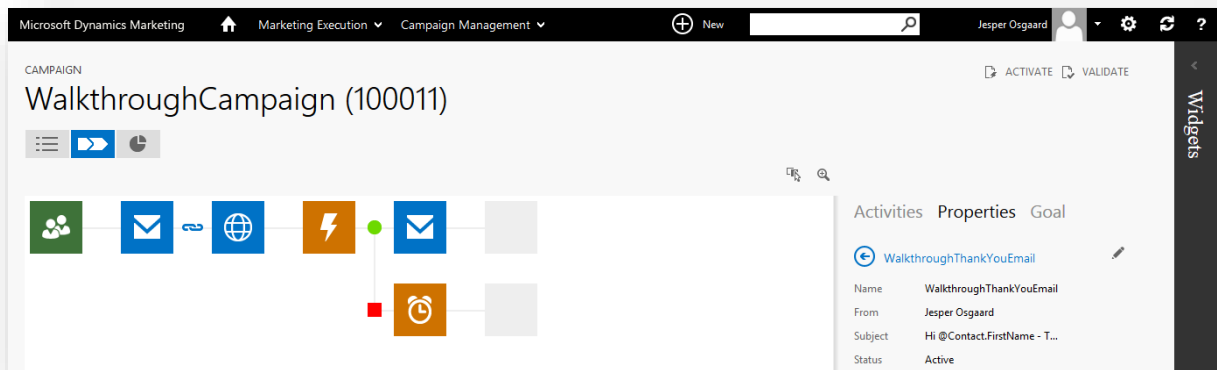
10. Choose the **Activate** button to activate the campaign. Note the following:

   o Processing will begin on the **Start Date** configured for the campaign and continue until the **End Date** is reached, after which it will be deactivated.

   o If any new contacts are added to the marketing list while the campaign is active, those contacts will also be processed by the campaign.

   o Campaign automation is not instantaneous, so several minutes may pass before the emails arrive and, likewise, several minutes may pass between each tile.

   o The **Activate** button is changed to **Deactivate**

Step 8: Interact with the campaign and observe the results

Your landing page, email and campaign are now up and running. Now you'll interact with them and see how our actions affect the campaign and are reported by Dynamics Marketing.

1. Open the email inbox for the email address that you assigned to the contacts in the campaign send list. After a minute or two, you should see the emails sent by the campaign.
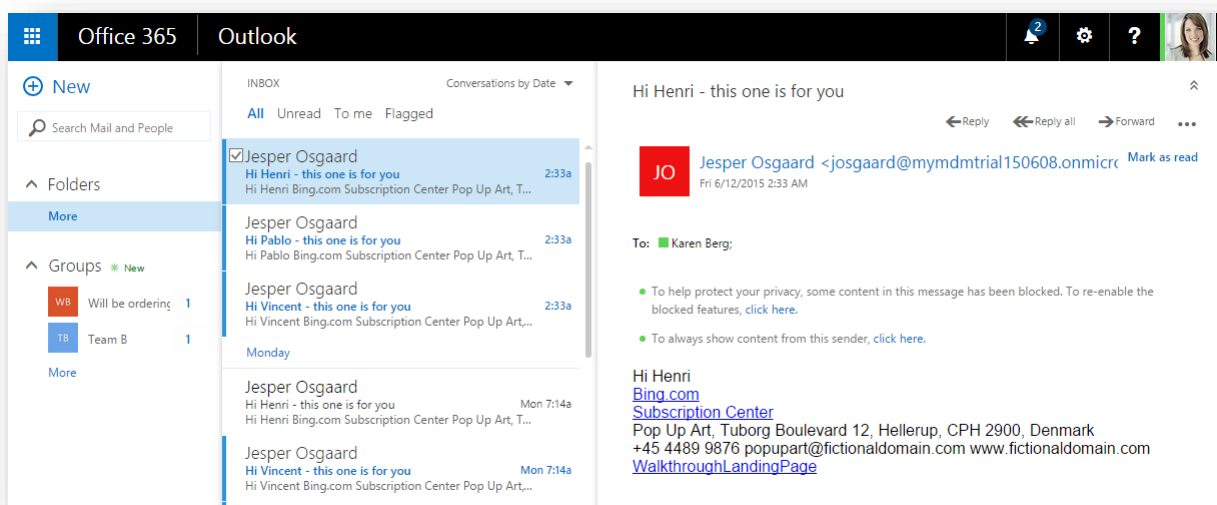
2. Open one of the messages and load images, but don't click any links.
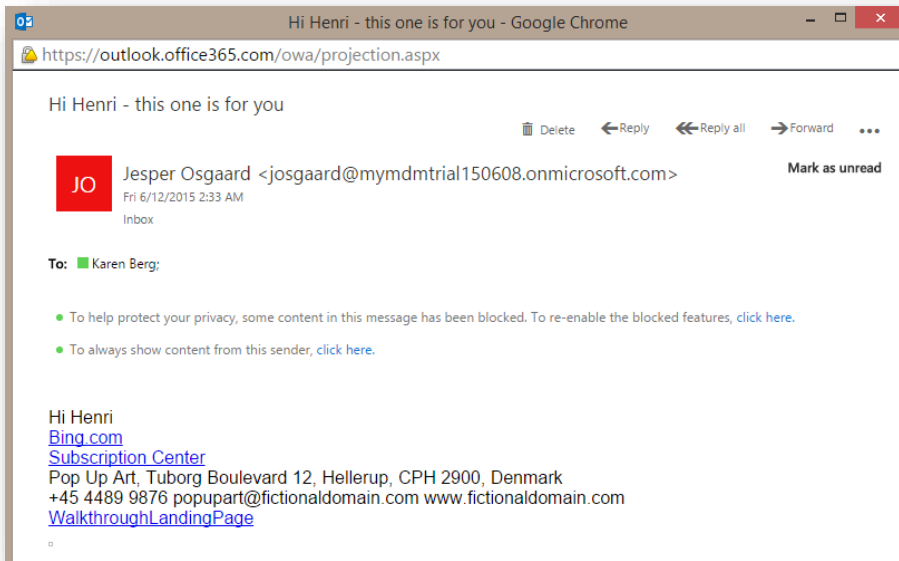
Allow blocked content (ie hidden GIF)
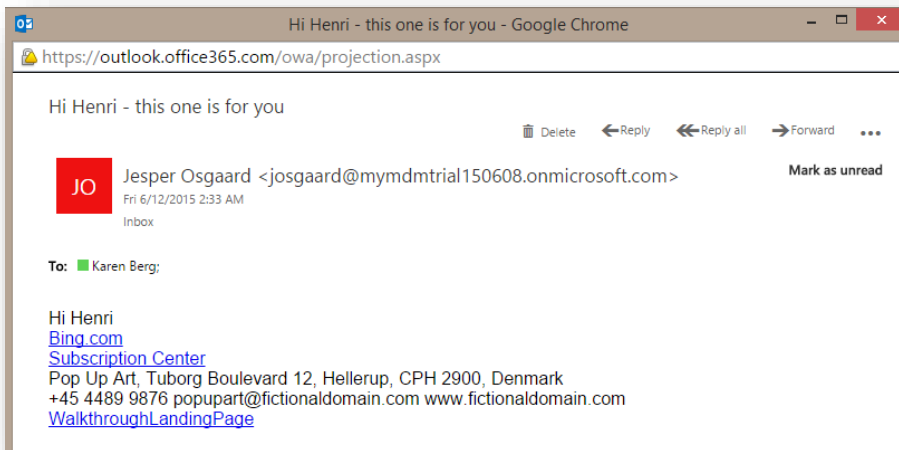
3. Go back to your Campaign canvas and look at the tile numbers. At this point, they should resemble those shown here, for a campaign sent to three contacts.

- o The **List** tile shows the number of contacts included in the campaign.
- o The first **Email** tile shows the number of emails sent (which should now match the number on the **List** tile), the number opened and the number bounced. You should see that the email was opened once (can take a little time to reflect count of opened emails)

o The **Trigger** tile shows the number of contacts waiting to be processed by the trigger. In this case, the trigger is waiting for contacts to submit the landing page. Since none have done so, you should see the same number here as the number of sent mails.

It can sometimes take a few minutes for the tile displays to update. If your numbers don't match the preceding descriptions, wait a minute or two and then choose the **Refresh** button in the navigation bar. After one or two tries, you should see the numbers update.

4. Go back to the message that you opened in your email client and choose on the landing page link at bottom of the mail.
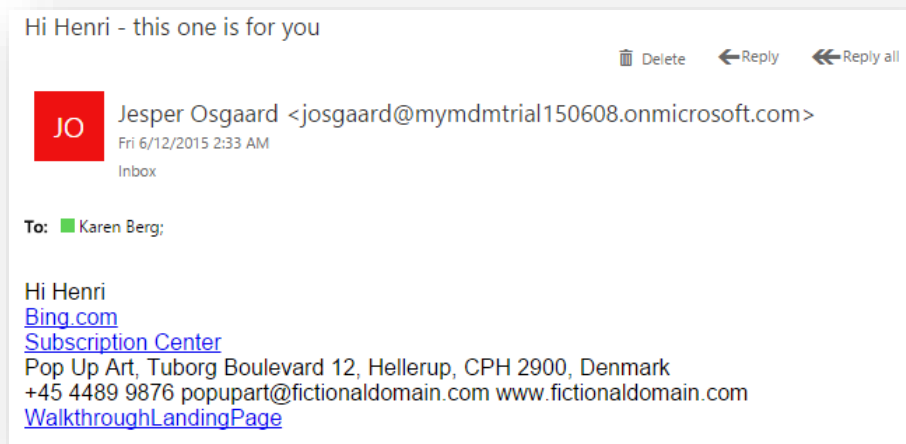
This brings you to the landing page you designed earlier. Fill out all of the required fields in the landing page, <u>using the first name, last name, and email address of the contact that received the email</u>

Email	*	karenb@msdascie2015spring.onmicrosoft.cor
Salutation		Mr. ▾
First Name	*	Henri
Last Name	*	Matisse
Company		Frenchart
Title		Painter
Address		Bredgade 1
City		Roskilde
State		CPH
Postal/ZIP		4000
Country/Region		Denmark ▾
Phone 1		+4544890100
Phone 2		
Phone 3		
Category		▾
Language		▾
Lead Time		
Time Zone		(UTC+01:00) Brussels, Copenhagen, Madr ▾
Do Not Call		☐
Do Not Email		☐
Do Not Mail		☐
Contact Preference		Email ▾
Message Format		HTML ▾
Type		▾

VJEQ3

Generate a new image
Play the audio code

Type the code from the image.	*	VJEQ3

* Required information

☑ Remember my information

[Submit] [Clear]

Important

o The *first name*, *last name*, and *email address* that you enter must match exactly those of the contact that received the email. Dynamics Marketing will compare these to the contacts included in the campaign; if they exactly match an existing contact that is part of the campaign, the landing-page submission will be credited to that contact and the contact will pass through the trigger.

o If any of these three values don't match an existing contact, Dynamics Marketing will instead create a new contact, but won't attach the new contact to the campaign.

o For other fields, for example, city or phone number, you can enter any value that you like; this updates the record for the existing contact (with matching fist name, last name, and email).

Note that this list applies to the default duplicate-detection setting in Dynamics Marketing. It is possible to configure the system so that email address alone uniquely identifies a contact on landing pages and elsewhere. For more information about the **Duplicate Detection** setting, see the online help topic Configure site settings.

5. Click Submit to submit the the landing page form – you'll get at confirmation from the page
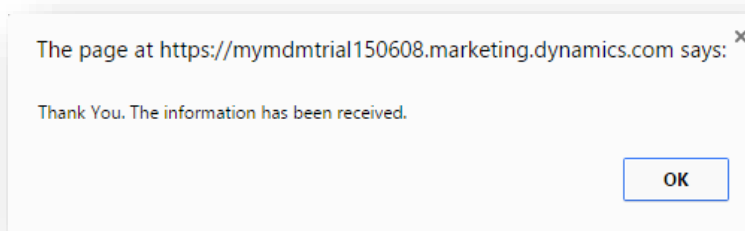
6. Return to your email inbox. After a short time, you should receive the thank you email.
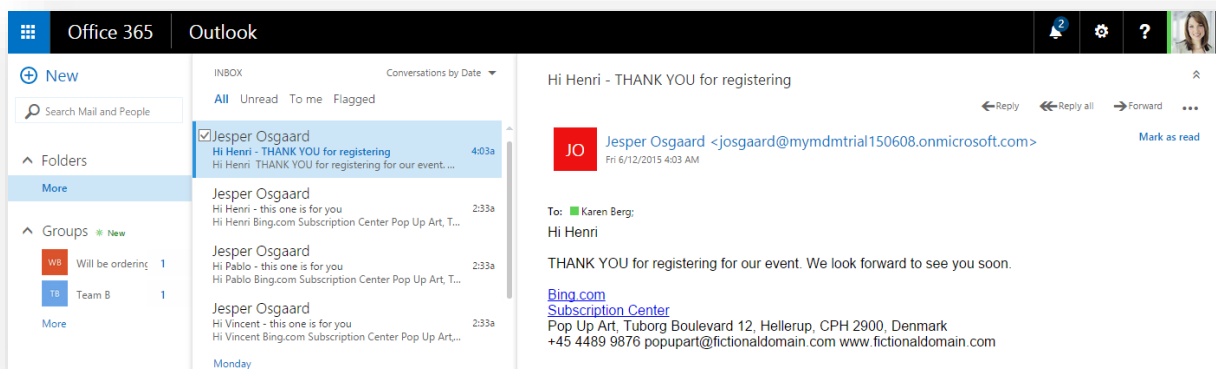
7. Go back to your **Campaign** canvas and look at the tile numbers.

The trigger tile should now show one fewer contacts as waiting
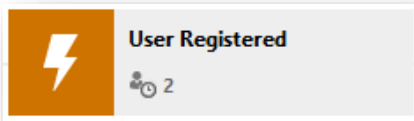
and the thank you **Email** tile should show that a thank you mail has been sent. If you opened the mail (and loaded images), this should also be indicated here.

Again, if the number displays have not updated yet, just wait a few minutes for the various logs to propagate through the system.

Explore other areas where behavior and interaction data is shown

You have now covered all of the minimum requirements for setting up an automated email campaign with a landing page, behavior, and interaction reporting. You have, in fact, generated even more data than you have looked at so far. If you are curious, try some of the following:

1. Go to **Marketing Execution** > **Internet Marketing** > **Online Visitors**. Here you can find information about all website interactions on pages where a Dynamics Marketing behavioral-analysis script was present. You should be able to find sessions associated with your landing-page visits here. If you reload the landing page a few times in your browser, you'll be able to observe the changes here, too. For more information see the online help topic View web visitors and their activity
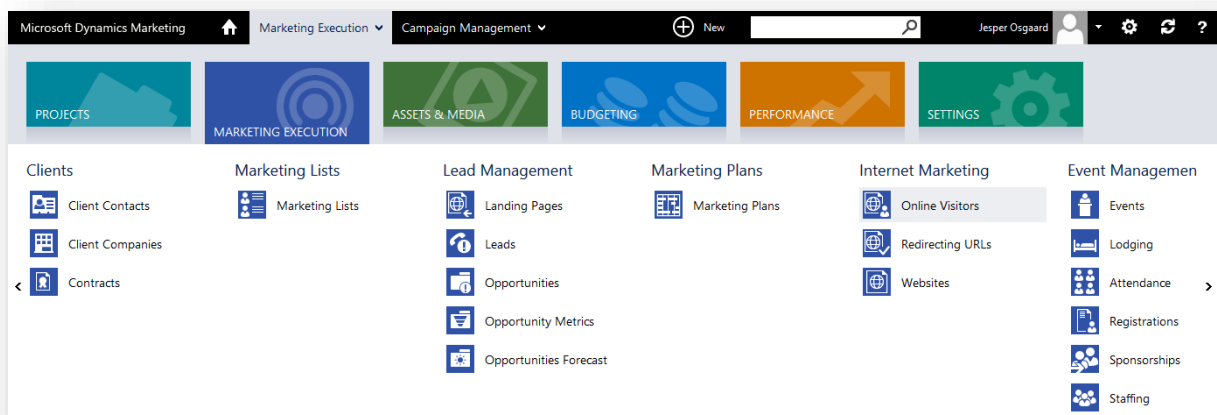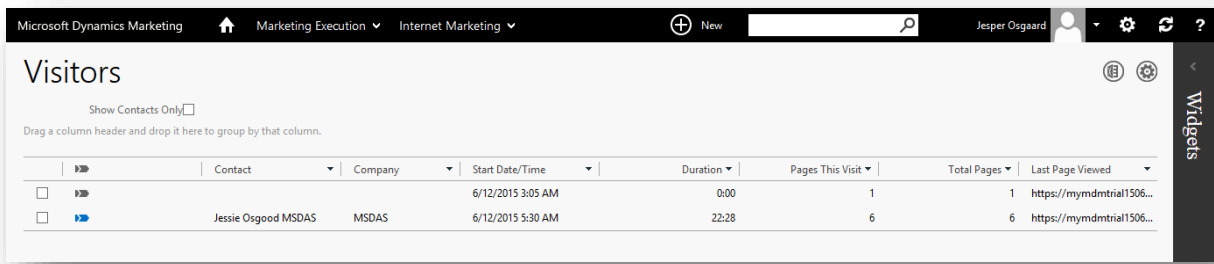
2. Go to **Marketing Execution** > **Marketing Database** > **Marketing Contacts** and remain in the list view.
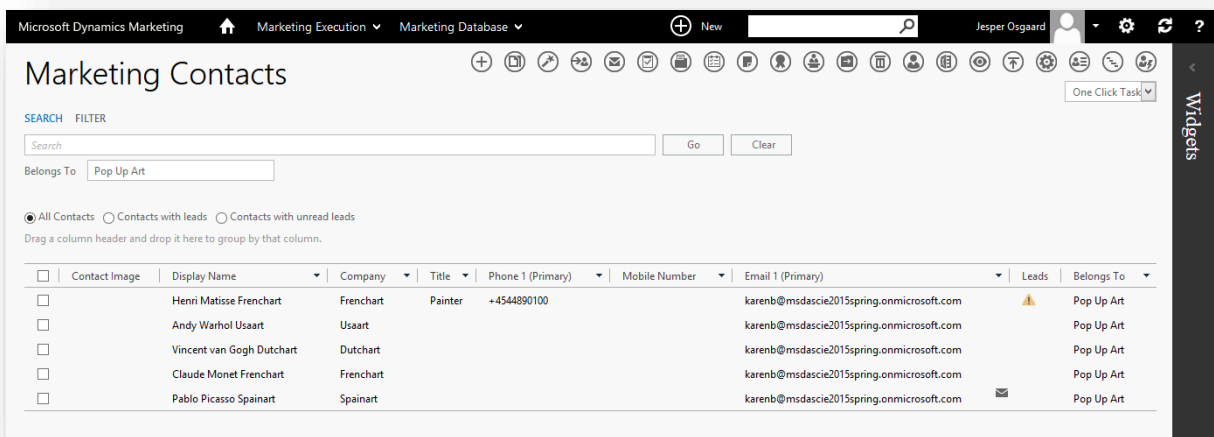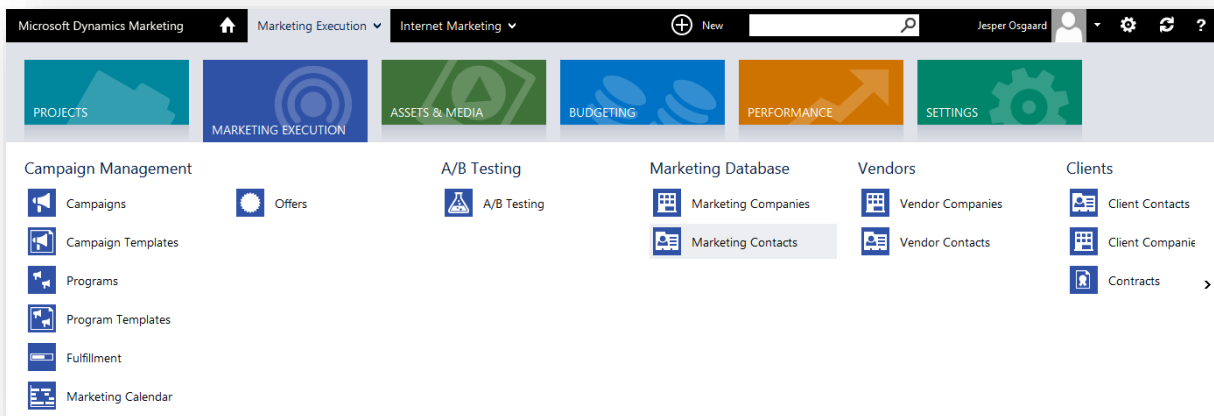
Select the check box for each contact that you included in the campaign and then select the **Marketing Engagement** button ⊕ from the toolbar (right most button)
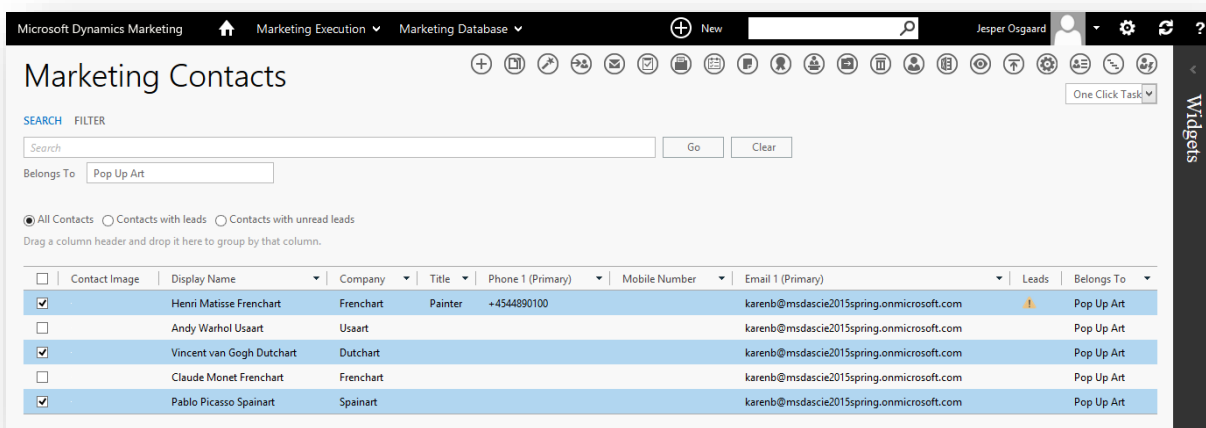
The Marketing Engagement page provides an overview of the various ways in which the selected contacts have interacted with your marketing initiatives.
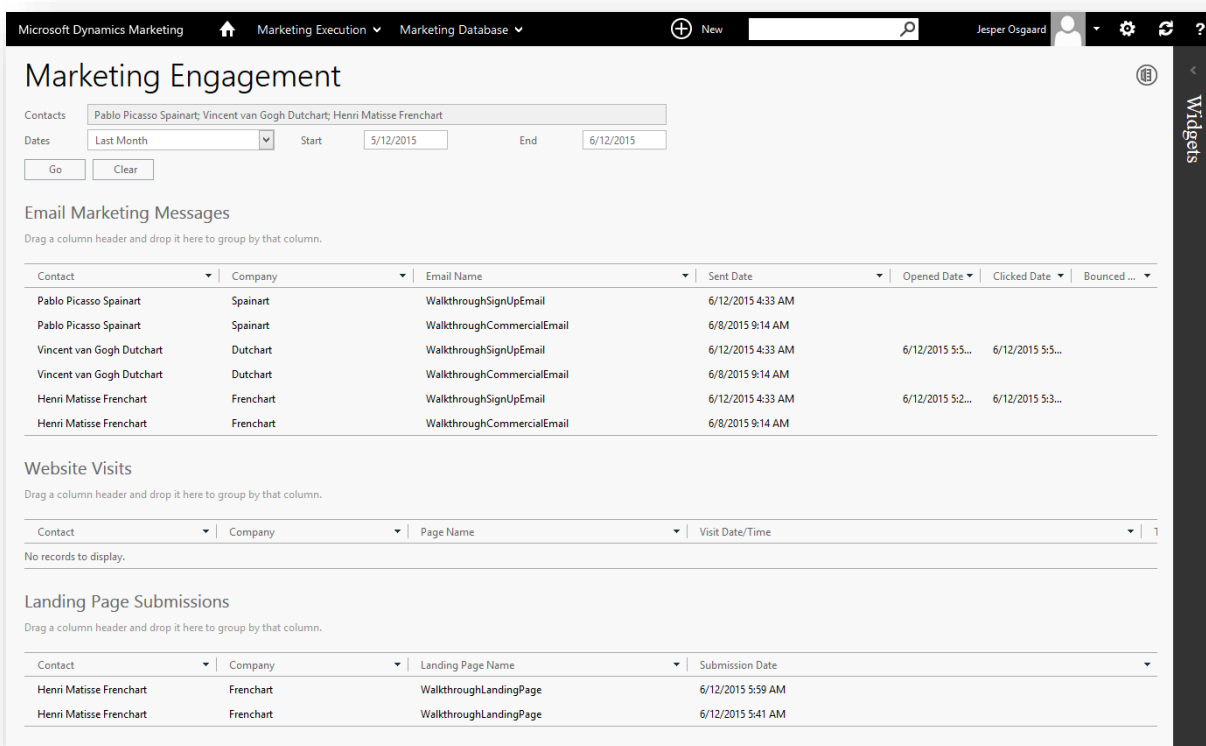
For more information see the online help topic See how contacts are engaging with your campaigns

3. Go to **Marketing Execution** > **Marketing Database** > **Marketing Contacts** and find one of the contacts you included in the campaign.
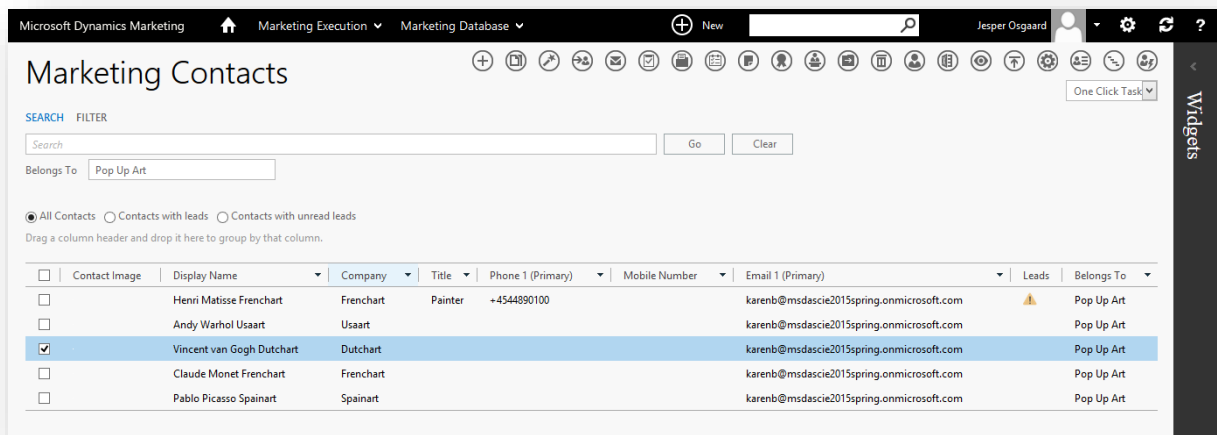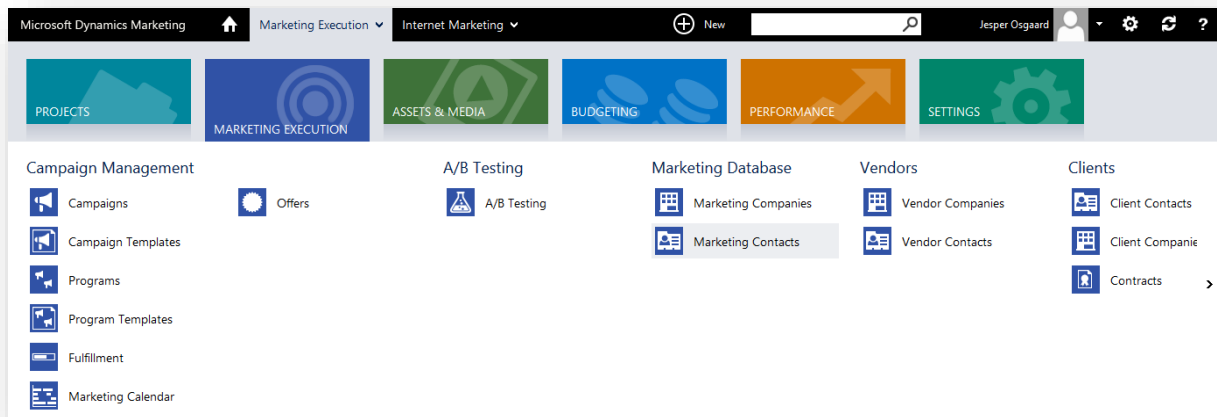
Open the contact's maintenance page (click the Display Name)

and then choose the **Email Marketing** related-information tab.
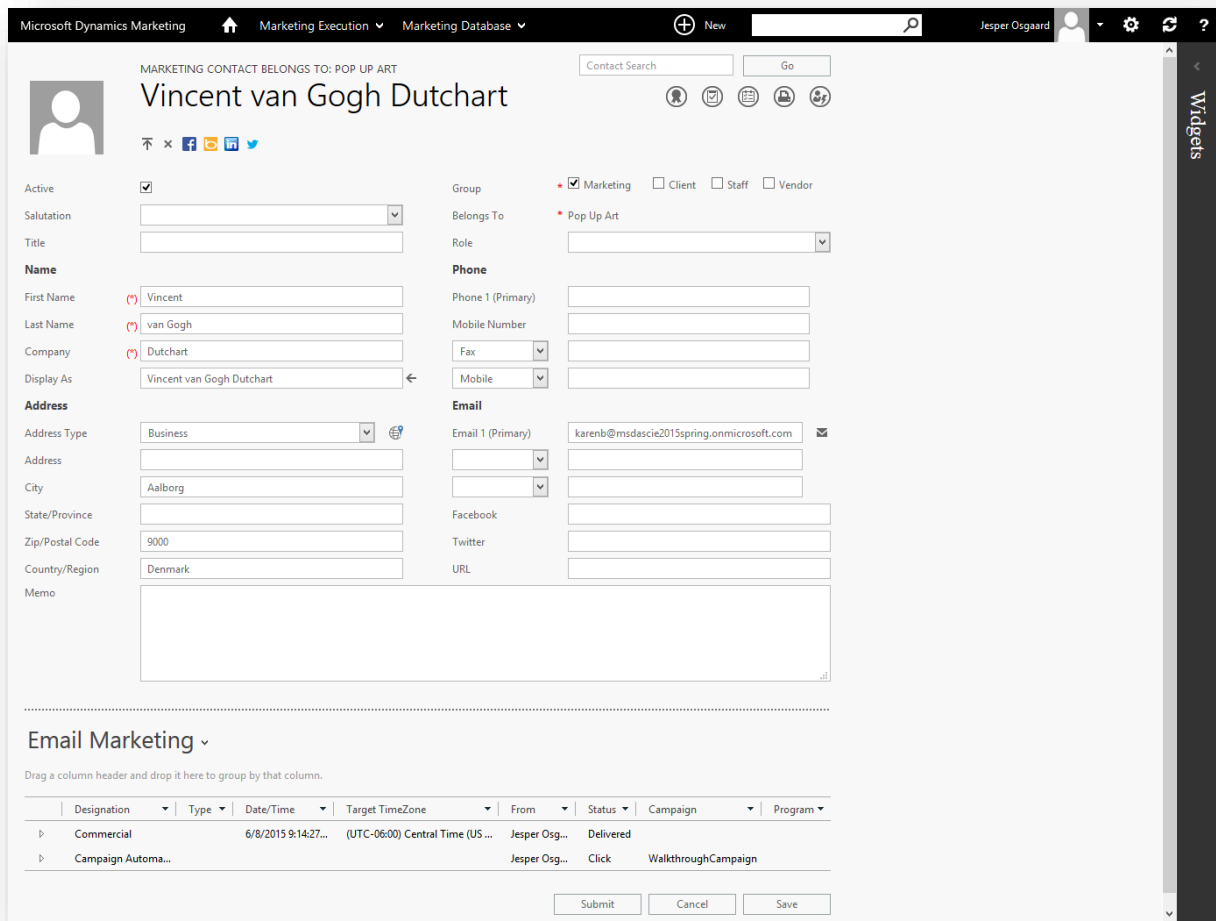
Here you can see details about each marketing email that contact has received. Note that the contact received a Commercial email (from the 'manual' send in Walktrough 2), as well as a Campaign Automation email (from this walktrough). For more information see the online help topic Manage contacts

4. Go to **Marketing Execution** > **Email Marketing** > **Email Marketing Messages** and find the invitation mail you made for this walkthrough.
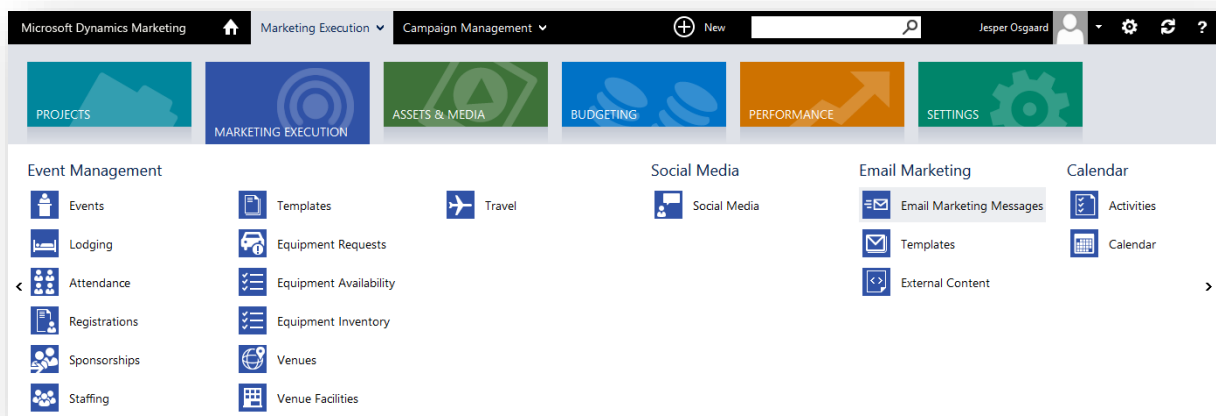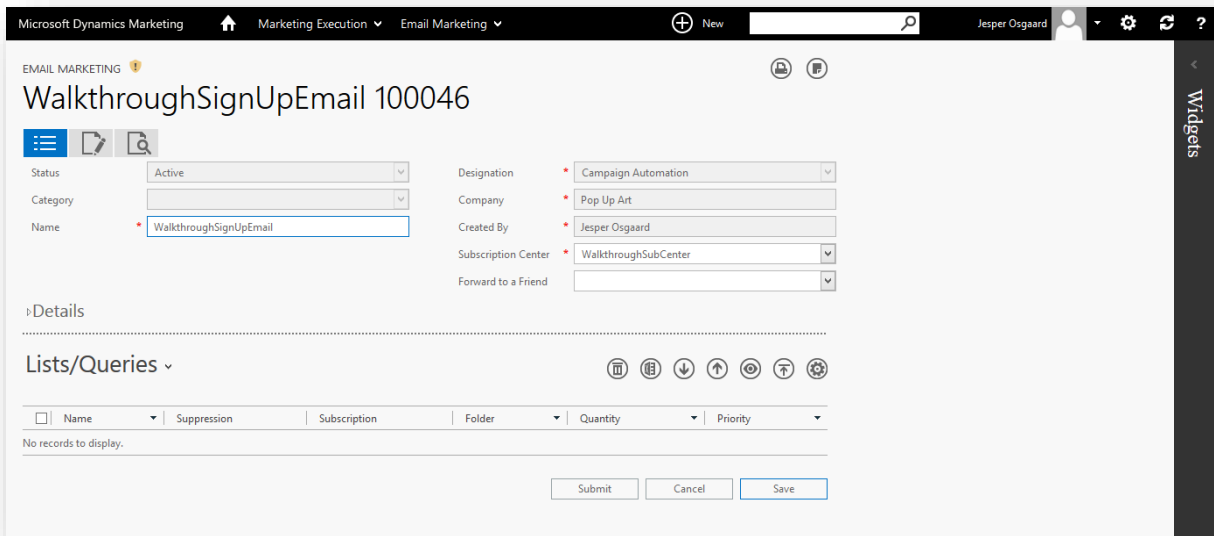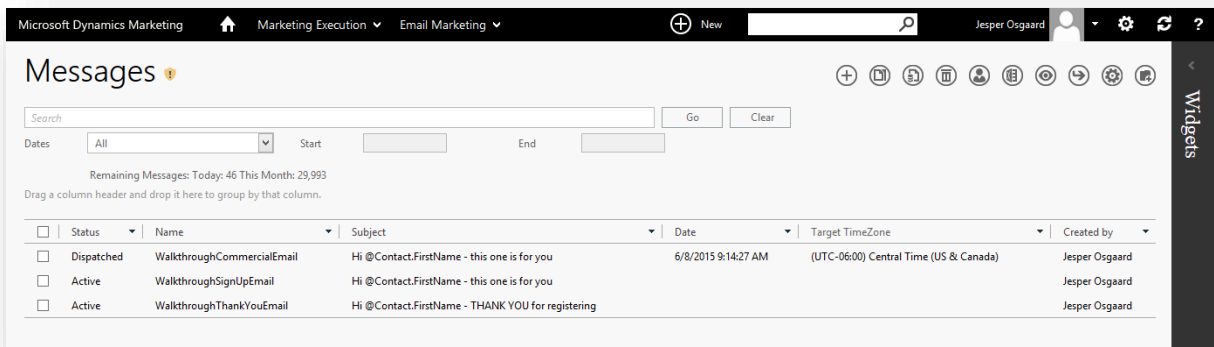
Open its maintenance page and then open the **Performance** related-information tab.
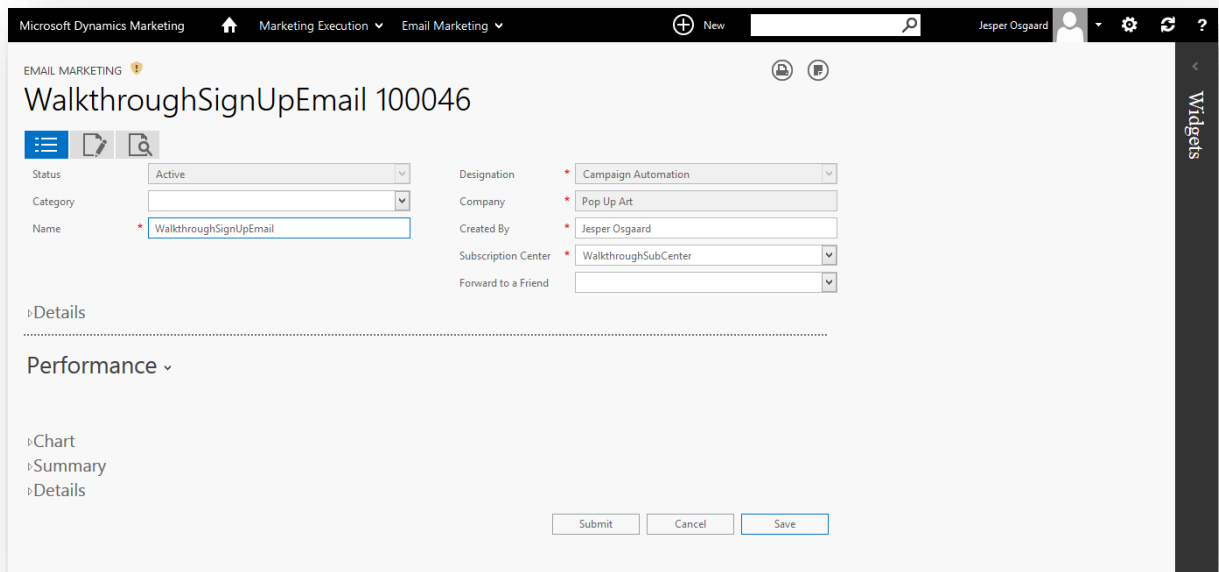
Here you can see even more details about how the mail was sent and how contacts interacted with it.
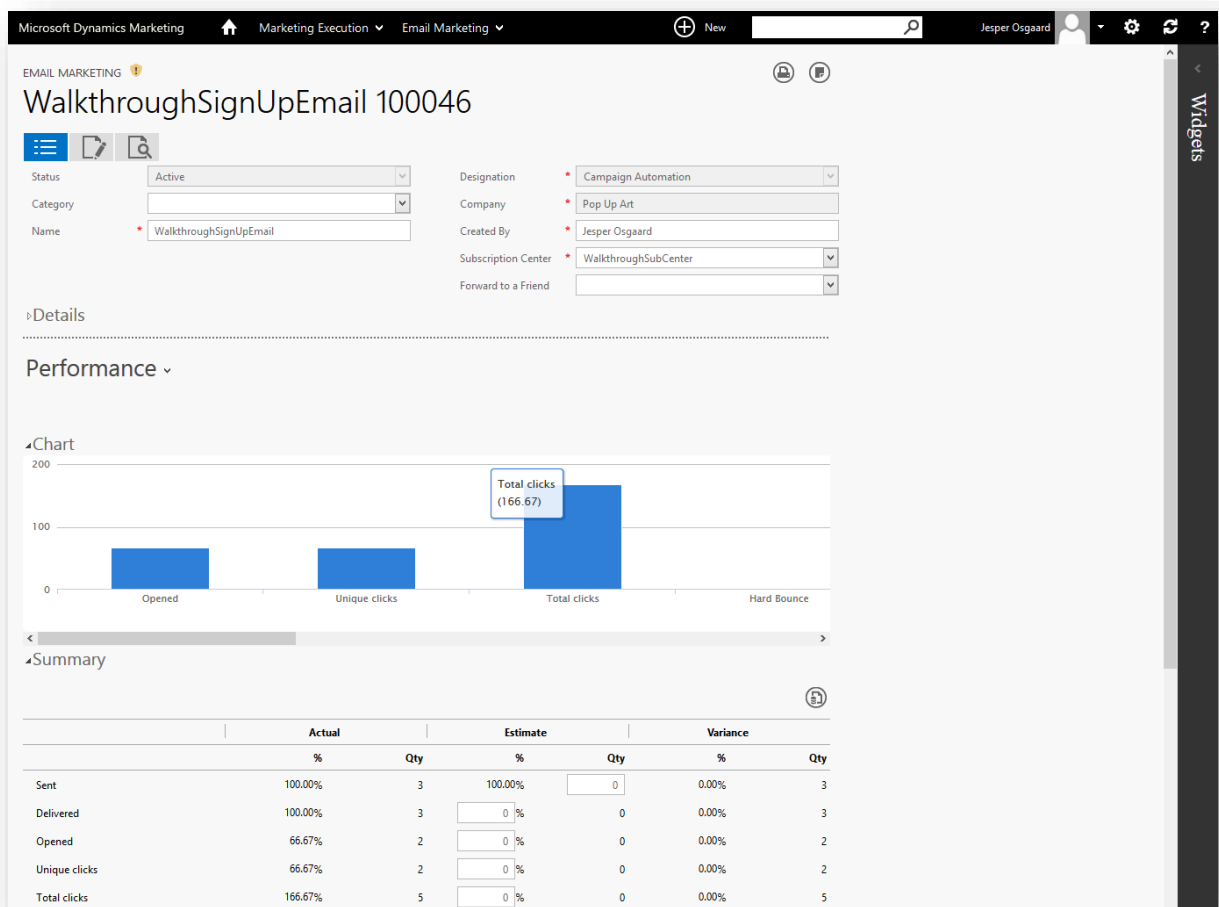
Open the **Contacts** related-information tab to see which contacts received the mail.

(Note that you can also see this information in the fly-out for the email directly on the campaign canvas.) For more information see the online help topic Create or view email marketing messages

5. Go to **Marketing Execution** > **Campaign Management** > **Marketing Calendar**.
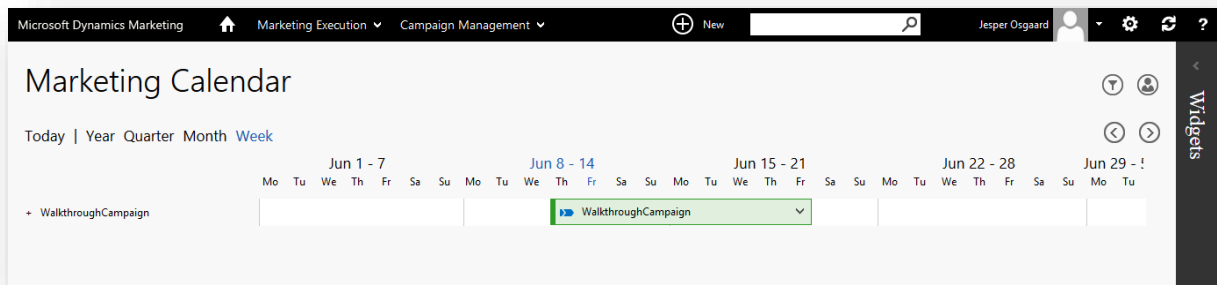
This opens a Gantt chart that shows all campaigns that are currently running (probably only the one you just created). You can expand a campaign to see its components.
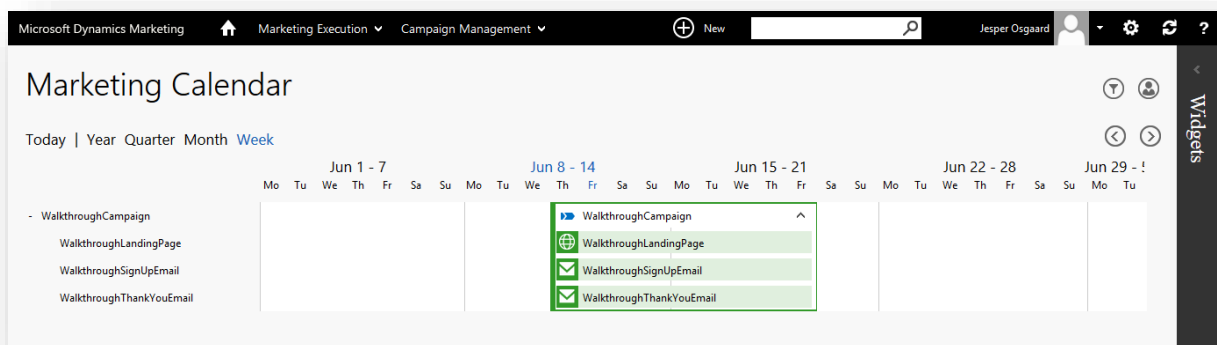
You can click the campaign name or the name of any of its components (eg. an email) to view details of the selected item in a fly-out.
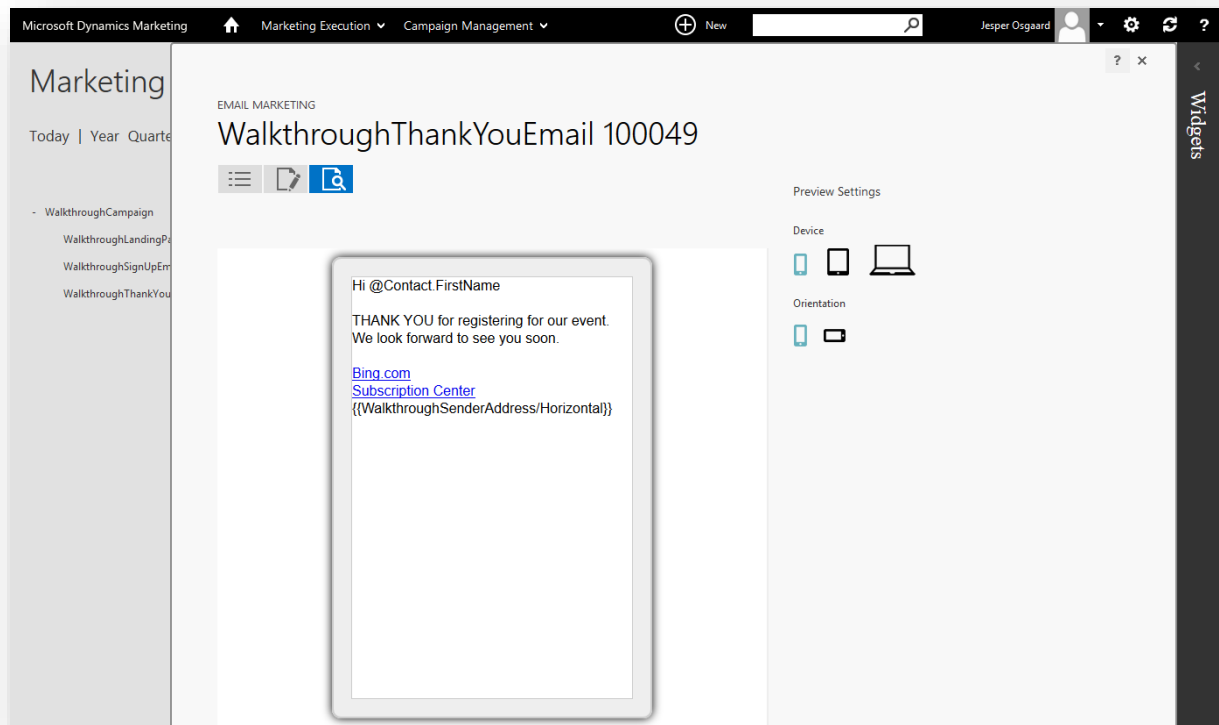
For more information see the online help topic Keep track of company-wide projects with the marketing calendar

Appendix A:
Learn how to work and get around in Microsoft Dynamics Marketing

This topic introduces many of the common user-interface elements and working methods that you'll use while working in Microsoft Dynamics Marketing. You'll get a basic understanding of the logic and conceptual approaches implemented by the system. Once you understand these, you should be able to gain an intuitive understanding for how to get started working with the various features and areas.

Sign in to Dynamics Marketing

To access Microsoft Dynamics Marketing, you must have an Office 365 subscription and be assigned as a Dynamics Marketing user by your Office 365 administrator. Usually, this means that you also need to have a license for Dynamics Marketing, though some limited functionality is available to non-licensed users (these are called "portal users". However, even portal users must have a Office 365 subscription and be set up as users to your Dynamics Marketing instance.

To sign in to Dynamics Marketing, do one of the following:

- Sign in to your Office 365 portal and choose Microsoft Dynamics Marketing in your list of services.

- Enter (or bookmark) the URL for your Microsoft Dynamics Marketing instance into your browser. If you aren't already signed in to Office 365, you'll be asked to enter your Office 365 user name and password. If your credentials are accepted, you'll be forwarded to Microsoft Dynamics Marketing.

Navigate around the main areas of the site

Use the bar at the top of the page to navigate between all of the various features and displays of Microsoft Dynamics Marketing. The exact selection of pages available to you here will depend on your role in the system and the set of permissions set up for you by your system administrator.

The navigation controls are as follows:

- **Breadcrumb and navigator drop-down**: To open the navigator, choose the text label to the right of the home button in the navigation bar. (The label here is a 2-level breadcrumb, which indicates the area and category in which you are currently working.)

- **Application areas**: The main areas of the application are represented by this row of colorful tiles. Select a tile to view the categories and features associated with a given area.

- **Feature categories**: The various features are grouped by category. The category names are shown here.

- **Feature buttons**: Select a button to go to a specific feature. (Usually, this brings you to a list page, which you can use to find and open the maintenance page for a specific record).

- **Scroll arrows**: In some areas, the menu might be wider than your screen; in this case, you can scroll using the arrows on the left and right side of the menu. Try also to use your mouse scroll wheel to scroll here.

- **Home button**: Choose the home button to go to your home page, which you can populate with a customized collection of graphical widgets (see below).

Find and manipulate records with list pages

In most cases, the first thing you will see when you navigate to a feature is its list page, which resembles a spreadsheet. Each row represents an individual record in the database, with the content of each record summarized in the displayed columns. From here you can search, sort, filter, group, create, copy and delete records—and more. You can also customize the set of columns displayed and adjust their widths. List pages are useful both for finding a specific record and for analyzing groups of records. For some features, you can edit records directly on the list page, but in most cases you will need to open the maintenance page for an individual record in order to change the data it contains.

A typical list page is shown below. Note the search/filter area, the column filter and the toolbar.

- **Search and Filter**: The search form searches in all data fields at once to find matching records. Most (but not all) list pages also provide a **Filter** link here; choose it to open a form in which you can search for specific types of values (such as status or start date). Each page provides those filters that are most useful for a given type of list. Enter text and choose **Go** to search. Choose **Clear** to remove all custom filters, groups and search criteria.

- **Group records**: To list records in groups according to values in a given column, drag a column header to the area just above the table (onto the text that says "Drag a column header and drop it here to group by that column"). Once grouped, you will be able to see the groupings and sort-direction for each group here. To stop grouping by a given column name, click and drag that column name away from this area.

- **Filter by column value**: Choose the filter button at the right side of any column heading to set up a filter for values in that column. This opens a menu that includes an input field and a selection of logical operators. Enter a value and choose an operator.

- **Filtered column**: The filter button turns into a funnel button for each column that has an active filter; choose the filter button to adjust or remove the filter.

- **Sort by column value**: Choose any column header to sort the list according to the values of that column. Choose one again to reverse the list. An arrow button is shown to indicate which column is sorting the list and the direction of the sort.

- **Toolbar buttons**: The toolbar includes several buttons that enable you to manipulate the list. For example, you can choose to see only those records that you have created or to also see records created by other users; you can add or remove columns shown in the list; you can add or remove records; and you can show or hide inactive records. Some of the functions here are available on a wide variety of view pages (summarized below), while others might be very specific to just one or a couple of pages.

- **Select boxes**: Some toolbar functions only affect selected records. Mark the boxes here to select (or deselect) a record on which to operate with a toolbar button (such as delete).

- **Rearrange columns**: Use drag and drop to reposition the columns relative to one another.

- **Resize columns**: Click and drag the right edge of a column header to resize that column.

- **Open a record**: In most cases, you can choose any column value to go to the maintenance page for the associated record. From the maintenance page, you can edit all field values, create associations, add new associated records and/or navigate to associated records.

- **Inline edit**: For some types of records and fields, you are able to edit field values directly in the list view. For fields where this is supported, choose the target column value for a given record; in this case, you will be presented with an input field rather than going to the maintenance page.

The following table provides an overview of the most common toolbar icons shown on list pages (and some maintenance pages). The collection of icons provided on a given page will depend on the specific area in which you are working, but those listed below are typical. Specialized commands are also available in some areas; see the related section of this online manual for details about these.

Note

Several toolbar buttons act on one or more "selected records." To select a record, mark its check box in the left-hand column; all marked records will then become targets of the toolbar operation (for example, deletion).

Tip

Toolbar icons provide tool tips that will help you discover and remember what each button does. Hover your mouse pointer over a button to view the tip.

Toolbar button	Description
⊕ **New**	Creates a new record.
▣ **Copy**	Creates a copy of a selected record. Your new record will open in its maintenance page, ready for editing. (You can also copy several records at once, but just one of these will be available for editing immediately afterwards.)

Recurring Copy	Creates a copy of a selected record. Your new record will open in its maintenance page, ready for editing. (You can also copy several records at once, but just one of these will be available for editing immediately afterwards.)
Delete	Deletes one or more selected records.
/ **Show/hide other users' records**	Toggles between showing or hiding records that you do not own or did not create (records owned or created by members of any teams you are on count as your own records too). You will always be able to work with your own and your teams' records, but your ability to work with records belonging to other users will depend on your site permissions.
/ **Show/hide inactive**	Toggles to show or hide records that are inactive or deleted. (In most cases, "deleted" records still exist in the database; they are simply marked as inactive in case they are needed later.)
Customize columns	Opens a menu that enables you to modify the selection of columns shown in the table.
Excel	Downloads the current list as a Microsoft Excel document, enabling you to sort, format and present the data using Excel's advanced functionality. All filters, column and view settings will be applied to the exported list (not including pagination, however--all matching records will be included in the Excel file).
Print	Prints the information you are currently looking at. For list pages, this will usually just print the current list page, just as you see it on your screen (including pagination). In other cases, this will print a formatted report of a selected record or collection of records.
Email	Sends mail to the primary email address associated with each selected record. The content of the mail will depend on the specific list page you are working with; it might start out as an addressed (but empty) message, or it might include some default text (such as the name of a job) or even a report in PDF format (such as an invoice). You may also be asked to select an email template if appropriate. In all cases, you will go to an email form in which you can edit the message, add and remove addresses, and see any generated attachments.
Import	Starts a wizard that will help you to import records, such as marketing contacts, into the database.

Edit fields and work with related records by using maintenance pages

Maintenance pages display all of the data belonging to a single record and enable you to edit that data. They also display related records, enable you to create new relations between existing records and to create and associate new related records.

The main navigation controls are shown above. See the list below for a legend.

- **Breadcrumb**: A small number of maintenance pages provide a breadcrumb display at the top of the page, which indicates a path of relations between the current record and other related records. When present, you can choose any of the parent items in the breadcrumb to navigate to that record. For example, the maintain **Task** page provides a breadcrumb with links to the parent job and company records.

- **Toolbar**: A few functions for working with the current record may be available here. These may include print and email functions, notes, etc.

- **Top-level tabs**: Some maintenance pages provide two or three fundamental ways of viewing data about a selected record. This will typically include a tab with a summary of data values, plus maybe a tab for a graphical flowchart (such as the campaign-automation canvas) and/or a tab for posting related widgets, etc. Top-level tabs appear at the top of the page (below the title) when they are available.

- **Local data fields**: simple information fields that hold data about the current record (shown, but not labelled, in the illustration above). Though often important, the data in this type of field are typically not part of any advanced functionality.

- **Required fields**: fields marked with a red asterisk are required. You will not be able to save the record unless all of the required fields hold valid values.

- **Related data fields**: these look like standard, local data fields, but they actually link to a record from another data table. Typical examples of this type of field include the name of an existing company, contact, campaign, etc. associated with the current record. Fields of this type must hold a matching value from the related table (or be blank if they are not required). Values that do not match a current value from the related table will be rejected.

  o You can tell a related field by hovering your mouse over the field label; if the field relates to another table, the field label will show an underline on hover.

  o Choose the label of a related field to go to the related table; if the field already contains a value, you will go to the maintenance page for that record; if the field currently has no value, you will go to a form to create a new record in the related table.

- o Related data fields include a type-ahead lookup feature. Therefore, if you start typing in a related-data field, you will begin to see matching values displayed as suggestions. If you are not sure what to type, try typing "%%" to see a list of all available values.

- **Time and date input controls**: Data fields expecting time and/or date values provide these controls, which provide a pop-up calendar or time picker. These controls are fast to use and ensure that your values are entered using the correct format.

- **Drop-down list values**: These provide a limited set of values to choose from. In many cases, you can customize the choices shown in a given drop-down to match the values required by your business. See "Use categories to group information" for details about how to customize the values shown here.

- **Fold-down section**: Some types of records include a large number of data fields. For these, we have nested the more specialized fields under fold-down sections to organize them and keep them out of the way. Choose the fold-down arrow to open or close these sections (when present).

- **Related-information tabs**: Near the bottom of most maintenance pages you will see a dotted horizontal line below which you will find a drop-down list and several related controls (such as a toolbar, search form, record list, etc.). There you can find records that are related to the currently displayed record. Use the drop-down list to navigate between related-record types. We often refer to this control as a "tab" rather than a drop-down list because it completely replaces all of the content below the dotted line. For example, if you are looking at the maintenance page for a campaign, choose the **Tasks** tab to see and create tasks that are related to the current campaign, choose the **Email** tab to read and create emails related to the campaign, etc. These tabs can provide a wide range of functionality; for example, some tabs feature controls that work very much like a list page, while others provide graphical tools and analysis features.

- **Submit/Save/Cancel**: These buttons either save or discard your unsaved edits. Use **Submit** to save your changes and go back to the last view you had open; use **Save** to save your edits and remain on the current page; use **Cancel** to discard your changes. In some cases, you must save your record first before you can submit it (thus reloading the page with more information that you need to consider before continuing).

- **User-defined fields** (not shown): User-defined fields (UDFs) are created by your site administrator to help customize Microsoft Dynamics Marketing for the business needs of your specific organization. When present, these typically appear near the bottom of the main field set, but they are otherwise not special. For details about how to create UDF fields, please see "Configure user defined fields".

Work more effectively by customizing your home page and widget dock

Use the home page and side dock to customize Microsoft Dynamics Marketing so that it takes you directly to those features and data that are most important to you in your day-to-day work.

Every time you log in to Microsoft Dynamics Marketing, you will arrive at your home page, which you can customize using any number of specialized widgets. These provide charts, tables, lists and/or maps that give a quick overview of those areas of Microsoft Dynamics Marketing that are most important and relevant for you. You can arrange your home page using easy drag-and-drop operations and also change and configure your collection of widgets at any time. You can filter your data, drill down on a record, or just open a record to view it without needing to navigate to the various areas of the application.

Like the home page, the widget dock is also able to hold your preferred set of widgets, though the selection of available widgets is slightly smaller here than on the home page. You are able to view these from any page in the site by clicking on the show/hide dock button located on the right just below the help button.

The image shows a screenshot with labels.
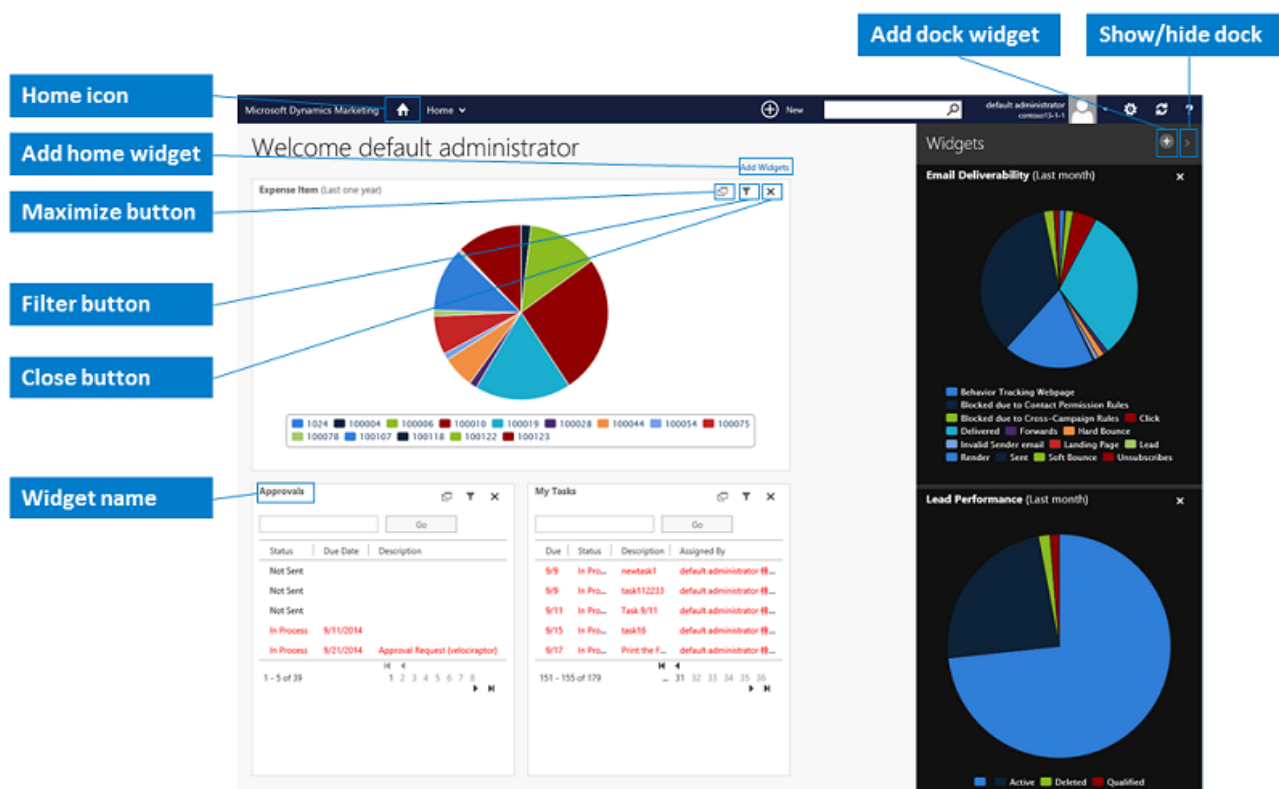
Controls for working with your home page and widget dock are highlighted in the illustration above. See the list below for a legend.

- **Home button**: Choose this to view your home page and work with its widgets.

- **Add Widgets**: Choose this to open a menu for choosing a widget to add to your home page.

- **Maximize button**: Choose this to zoom in on a widget.

- **Filter button**: Choose this to change the settings for the widget (for example, to show a different date range).

- **Close button**: Choose this to remove a widget from your home page or widget dock.

- **Widget name**: Choose the name and use drag-and-drop to reposition the widgets on the page as needed.

- **Show/hide dock button**: Choose this to show or hide the widget dock. You can do this on any page of the site. Once open, the dock will remain open as you navigate the site until you close the dock again.

- **Add dock widget button**: Choose this to add a new widget to the dock.

The best way to get a feel for how these various widgets work is to experiment with them. Start by finding a widget that displays the types of data you are interested in and then adjust its settings until the information you need is best highlighted for your day-to-day work.

Find files, jobs, and contacts quickly with site-wide search

The search field in the navigation bar at the top of every page enables you to search for files, jobs and contacts (other types of records are not indexed here). To use the search feature, start typing in the field; matching records will automatically be listed as type-ahead suggestions in a drop-down. When you can see the record you are looking for, choose it in the drop-down (or use arrow keys and press return to select). There is no search-results page, so you will always go straight to the relevant record from here.

Create common record types quickly with site-wide create

Quick-create hyperlinks are available via the **New** menu in the navigation bar at the top of every page. They save time by enabling you to create new records without navigating to a specific list page. Edit your preferences to customize the set of links that are displayed here (see Configure your preferences).