

2025 DYNAMICS CON



By the Power of Data! Unleashing Marketing Forms in D365 Customer Insights—Journeys



Speakers

coffee + DUNN



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Agenda

- Design
- Basic Functionality
- Advanced Functionality
- Data



Design



Design

- One of the core features is a basic WYSIWYG editor

The screenshot displays the Microsoft Dynamics 365 'Contact & Lead Form' editor. The interface includes a top navigation bar with options like 'Save', 'Check content', 'Delete', 'Refresh', and 'Publish'. Below this is a toolbar with various formatting options such as 'Paragraph', 'Font', 'Size', 'Bold', 'Italic', 'Underline', 'Text color', 'Background color', 'List', 'Link', 'Image', and 'Table'. The main editing area shows a form titled 'Contact Form' with the following fields: 'First name *', 'Last name *', 'Email *', and 'Job title'. Each field has a placeholder text 'Enter your [field name]'. A blue 'Submit' button is located at the bottom of the form. On the right side, there is a sidebar with the 'Edit text' section, which includes an 'Outer spacing' option with a checkbox 'Set equal for all sides' and a '10px' value.



Design

- One of the core features is a basic WYSIWYG editor
- You can also adjust the spacing and padding to affect the layout and visual hierarchy

The screenshot displays the Microsoft Dynamics 365 'Contact & Lead Form' editor. The interface includes a top navigation bar with options like 'Save', 'Check content', 'Delete', and 'Refresh'. Below this is a rich text editor toolbar with various formatting options. The main workspace shows a form titled 'Contact Form' with four input fields: 'First name *', 'Last name *', 'Email *', and 'Job title'. Each field has a placeholder text: 'Enter your First name', 'Enter your Last name', 'Enter your Email address', and 'Enter your Job title'. A blue 'Submit' button is positioned at the bottom right of the form. On the right side, a sidebar titled 'Edit text' provides settings for 'Outer spacing', with a checkbox for 'Set equal for all sides' and a '10px' value.

Design

- One of the core features is a basic WYSIWYG editor
- You can also adjust the spacing and padding to affect the layout and visual hierarchy
- The HTML architecture is important to understand

```
data-notification-name="sessionsFullyBookedEventHasCapacity">
  <div>All sessions are fully booked but you can still register for the event.</div>
</div>
<div class="notification-message notification-message-hide" data-notification-name="eventWaitlisted">
  <div>This event is full, but you can still sign up for the waitlist.</div>
</div>
</div>
<div data-section="true" class="columns-equal-class wrap-section">
  <table class="outer" align="center" cellpadding="0" cellspacing="0"
    style="border-collapse: collapse; width: 600px; display: block;">
    <tbody>
      <tr>
        <th>
          <table style="width: 100%;
            border-collapse: collapse;" class="containerWrapper tbContainer" cellpadding="0" cellspacing="0">
              <tbody>
                <tr>
                  <th data-container="true" class="columnContainer" data-container-width="100"
                    style="vertical-align: top; min-width: 5px; width: 600px; ; height: 0px;"
                    id="container872ec940d3f3e1742249249940">
                      <table width="100%" cellpadding="0" cellspacing="0"
                        style="border-collapse: collapse; height: 100%;">
                          <tbody>
                            <tr>
                              <th class="inner ui-sortable"
                                style="min-width: 5px; padding: 10px; vertical-align: top;"
                                data-editor-backstage="7">
```


Design

- One of the core features is a basic WYSIWYG editor
- You can also adjust the spacing and padding to affect the layout and visual hierarchy
- The HTML architecture is important to understand
- Additionally, you can write and apply custom CSS to override default styles, enhance branding, and create unique and responsive designs

What is your job title?

Country

We are committed to protecting and respecting your privacy. We will only use your personal information to administer your account and provide the services requested.

☐ I agree to these conditions *

Submit

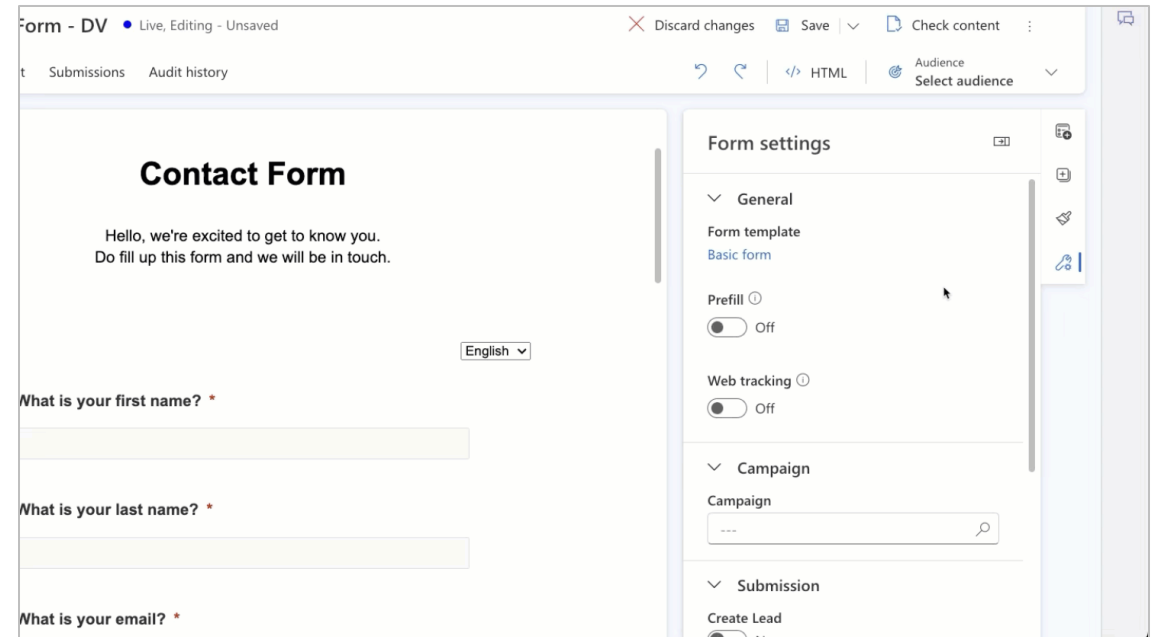


Basic Functionality



Basic Functionality

- Set-up



The screenshot shows a web application interface for setting up a contact form. The main area displays a preview of the form titled "Contact Form" with a welcome message and three input fields for "What is your first name?", "What is your last name?", and "What is your email?". A language dropdown menu is set to "English". The right sidebar contains "Form settings" with sections for "General", "Campaign", and "Submission". The "General" section includes options for "Form template" (Basic form), "Prefill" (Off), and "Web tracking" (Off). The "Campaign" section has a search bar for selecting a campaign. The "Submission" section shows a "Create Lead" button. The top of the interface includes a header with "Form - DV", status indicators, and action buttons like "Discard changes", "Save", and "Check content".



Basic Functionality

- Set-up
- Hidden fields

Submit

For further details about how we will process the information you have provided above, please see our [Privacy policy](#).

UTM Source

UTM Source

UTM Medium

UTM Medium

UTM Campaign

UTM Campaign

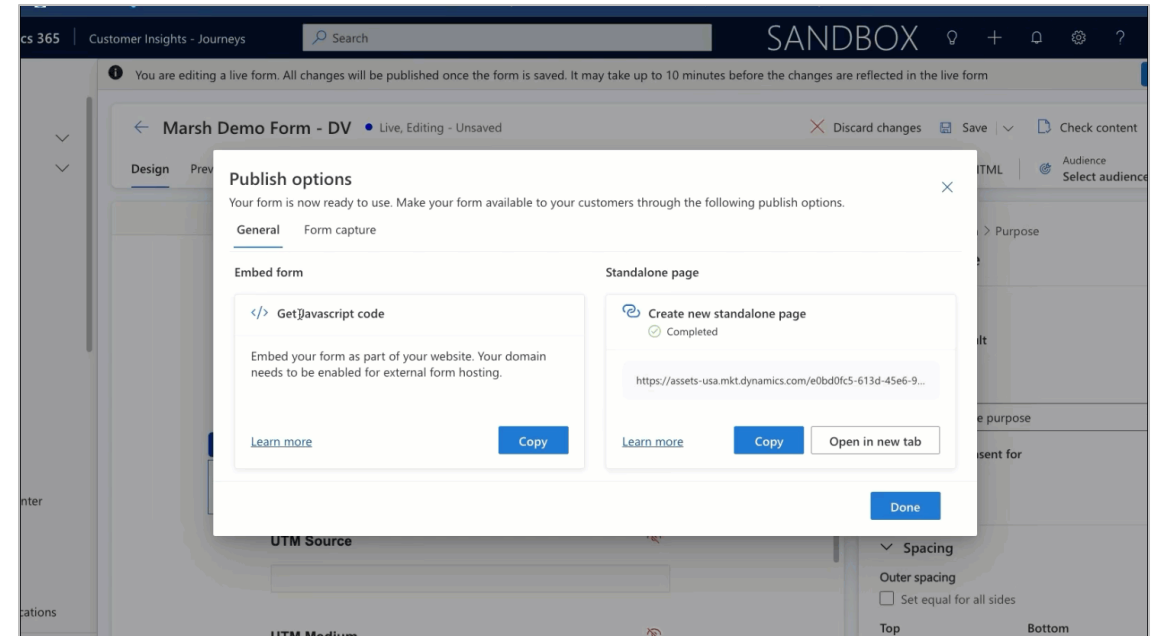
UTM Content

UTM Content



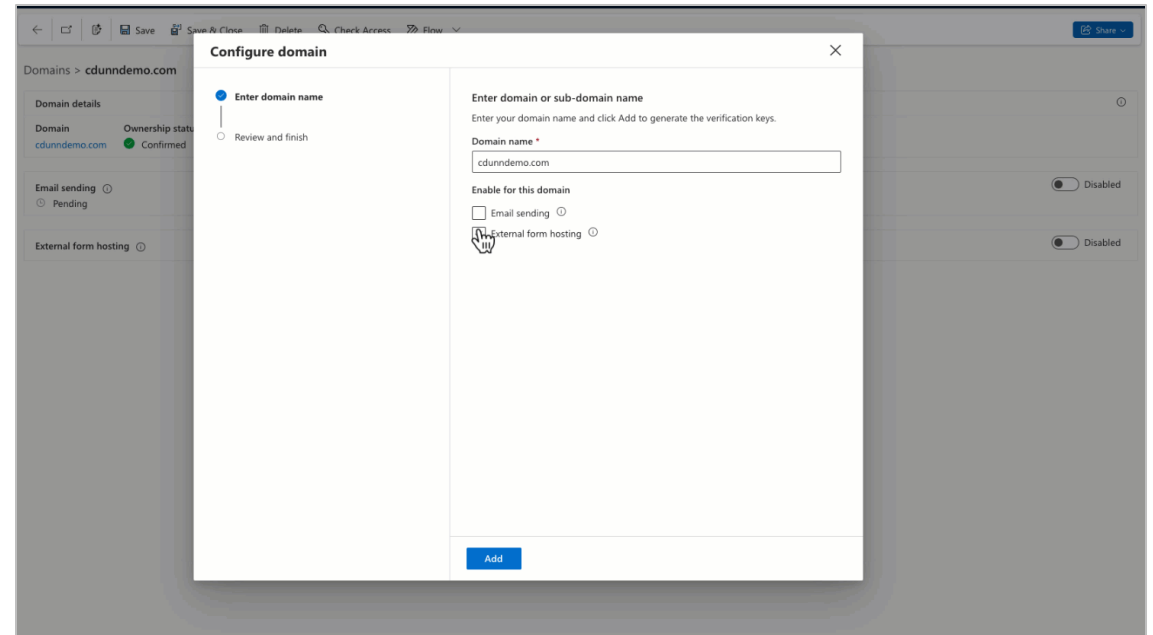
Basic Functionality

- Set-up
- Hidden fields
- Form Hosting + Capture



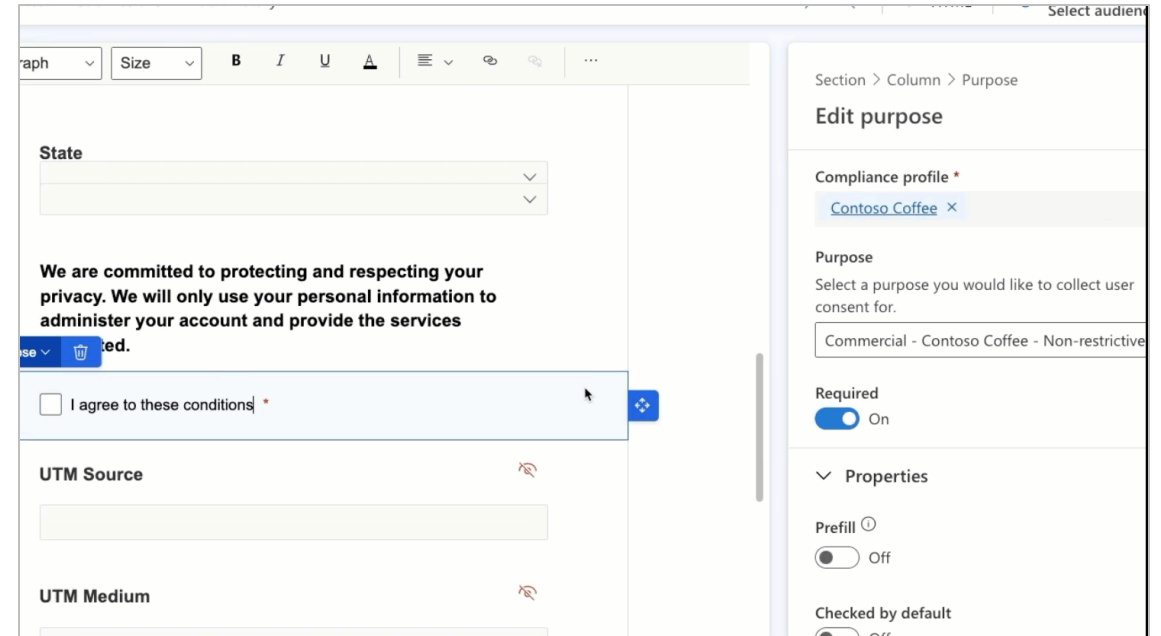
Basic Functionality

- Set-up
- Hidden fields
- Form Hosting + Capture
- Domain Authentication



Basic Functionality

- Set-up
- Hidden fields
- Form Hosting + Capture
- Domain Authentication
- Consent



The screenshot displays a Microsoft Dynamics 365 form interface. The main content area contains a 'State' dropdown menu, a privacy statement paragraph, a checkbox for 'I agree to these conditions', and two text input fields labeled 'UTM Source' and 'UTM Medium'. A right-hand sidebar is open to the 'Edit purpose' configuration page. This sidebar includes a 'Compliance profile' dropdown set to 'Contoso Coffee', a 'Purpose' section with a selected option 'Commercial - Contoso Coffee - Non-restrictive', a 'Required' toggle switch turned 'On', and a 'Properties' section with a 'Prefill' toggle switch turned 'Off'.

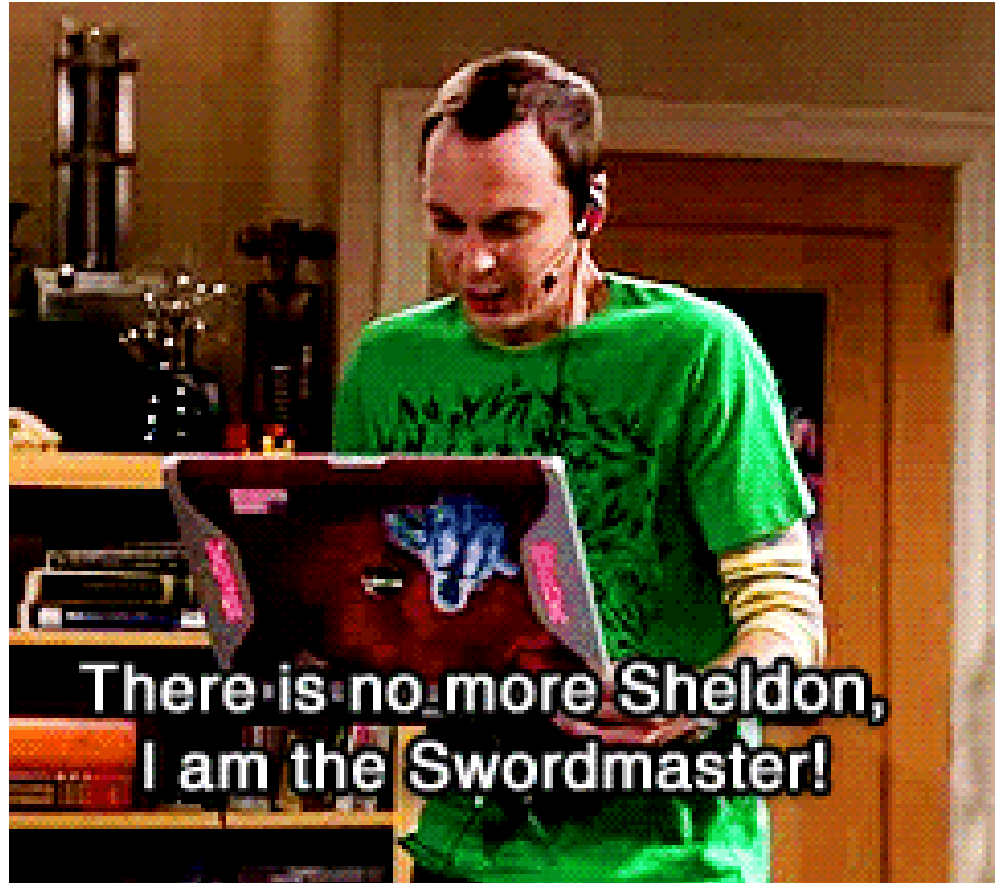
Basic Functionality

- Set-up
- Hidden fields
- Form Hosting + Capture
- Domain Authentication
- Consent
- Types

The screenshot displays the 'New Event' setup interface in Dynamics 365. At the top, a progress bar shows five steps: 'EventMainBusinessProce...' (Active for less than one minute), 'Preliminaries (< 1 Min)', 'Agenda', 'Organize', and 'Promote'. Below the progress bar, a horizontal menu includes 'General', 'Agenda', 'Website and form' (selected), 'Registration and attendance', 'Session registrations', 'Survey Responses', 'Additional information', 'Room reservations', and 'Custom Config'. The 'Website and form' section contains a dropdown menu for 'Where do you want attendees to register for this event?' set to 'On a standalone registration page'. Below this, the 'Registration page options' section explains that a registration page can be created by choosing a form, with a note that the URL will be automatically generated. The 'Registration form' field shows 'Default registration form'. The 'Registration settings' section includes three options: 'Create leads for event registrations' (checked), 'Allow attendees to register for sessions' (unchecked), and 'Allow single session registration only' (unchecked). The 'Make session registration required' option is also unchecked.



Advanced Functionality



There is no more Sheldon,
I am the Swordmaster!

Advanced Functionality

- Level up using custom fields for masking

Company name: *

Country/Location: *

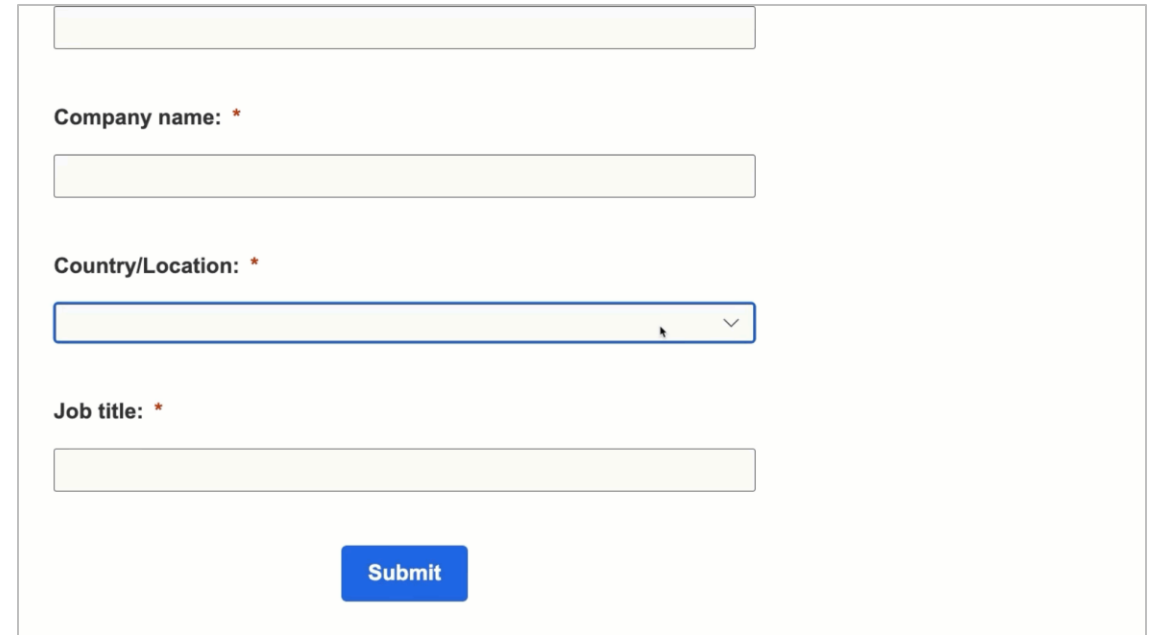
Job title: *

Submit



Advanced Functionality

- Level up using custom fields for masking
- Use JavaScript to:
 - create conditions for field logic




A screenshot of a web form with the following elements:

- A text input field at the top.
- A label "Company name: *" followed by a text input field.
- A label "Country/Location: *" followed by a dropdown menu.
- A label "Job title: *" followed by a text input field.
- A blue "Submit" button at the bottom right.



Advanced Functionality

- Level up using custom fields for masking
- Use JavaScript to:
 - create conditions for field logic
 - customize validation and error messages



Contact details

First name *

David

Last name *

Var

Email *

Job title *

Company name *

Advanced Functionality

- Level up using custom fields for masking
- Use JavaScript to:
 - create conditions for field logic
 - customize validation and error messages
 - use parameters to set fields and adjust functionality

Submit

For further details about how we will process the information you have provided above, please see our [Privacy policy](#).

UTM Source

UTM Source

UTM Medium

UTM Medium

UTM Campaign

UTM Campaign

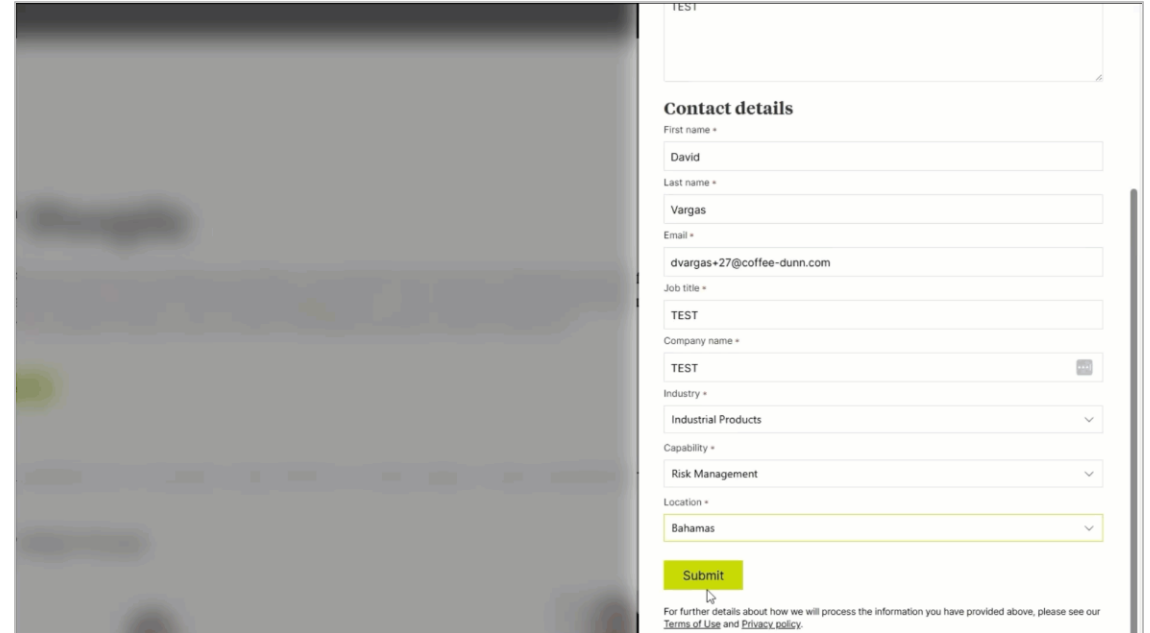
UTM Content

UTM Content



Advanced Functionality

- Level up using custom fields for masking
- Use JavaScript to:
 - create conditions for field logic
 - customize validation and error messages
 - use parameters to set fields and adjust functionality
 - customize post form submission behavior



TEST

Contact details

First name *

David

Last name *

Vargas

Email *

dvargas+27@coffee-dunn.com

Job title *

TEST

Company name *

TEST

Industry *

Industrial Products

Capability *

Risk Management

Location *

Bahamas

Submit

For further details about how we will process the information you have provided above, please see our [Terms of Use](#) and [Privacy policy](#).

Data



Data

- Form submission tables

Design

Preview and test

Submissions

Audit history

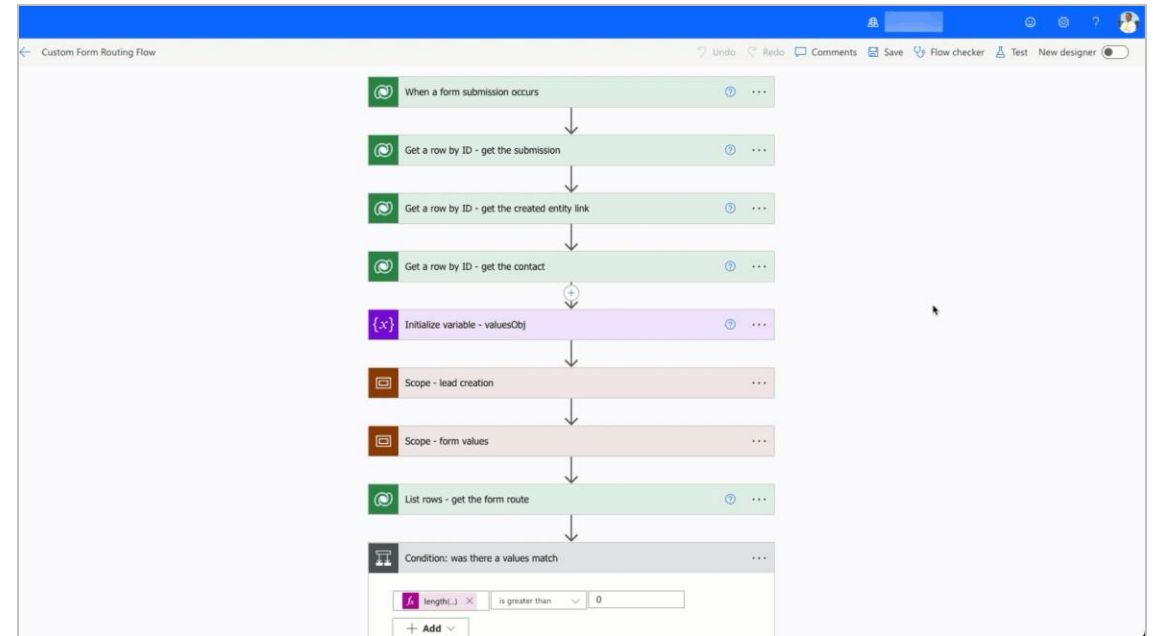
Submissions

<input type="checkbox"/>	Created On ↓	Linked Reco... ↓	Status R... ↓	Failure Description ↓	Page URL ↓	Submitte
<input checked="" type="checkbox"/>	5/12/2023 3:2...	David Vargas	Success			langSele
<input type="checkbox"/>	5/3/2023 12:3...	David Vargas	Success			langSele
<input type="checkbox"/>	5/3/2023 11:3...	David Vargas	Success			langSele
<input type="checkbox"/>	5/3/2023 10:2...	David Vargas	Success			langSele
<input type="checkbox"/>	5/2/2023 4:55...	David Vargas	Success			langSele
<input type="checkbox"/>	5/2/2023 4:05...	David Vargas	Success			langSele

Rows: 6 Selected: 1

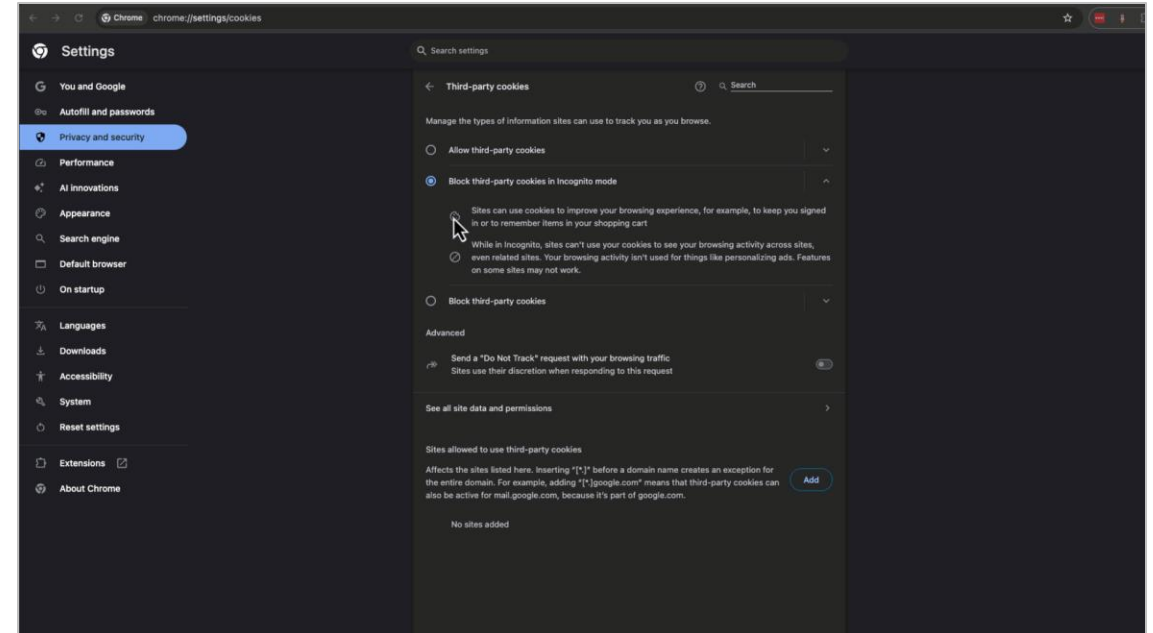
Data

- Form submission tables
- Power Automate Flows



Data

- Form submission tables
- Power Automate Flows
- Privacy settings impact



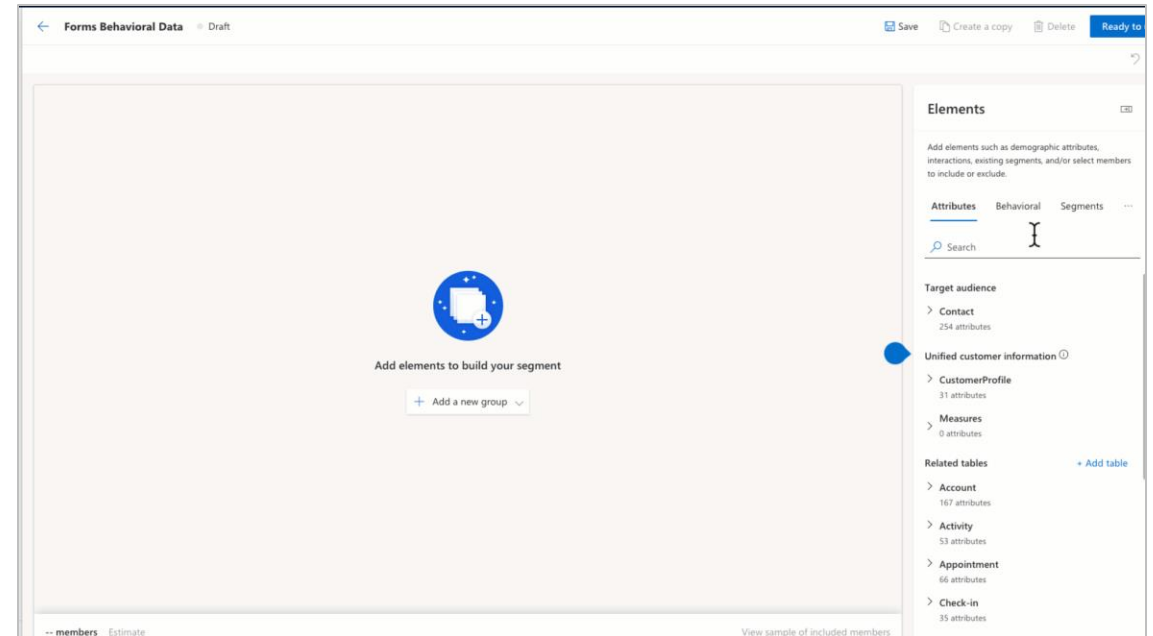
Data

- Form submission tables
- Power Automate Flows
- Privacy settings impact
- Table configuration

The screenshot displays the Microsoft Dynamics 365 Form Builder interface. The main canvas shows an 'Untitled Form' with a description 'Add description here'. Below the title, there are four text input fields with labels: 'What is your first name?', 'What is your last name?', 'What is your email?', and 'What is your phone number?'. Each label is followed by a red asterisk indicating a required field. The right-hand sidebar contains the 'Form settings' panel, which is divided into four sections: 'General', 'Campaign', 'Asset Download', and 'Autoreponder'. The 'General' section includes 'Form template' (set to 'Basic form'), 'Business Unit' (set to 'External'), and 'Form title'. The 'Campaign' section includes 'Campaign' (set to '---'). The 'Asset Download' section includes 'Asset Title' and 'Asset Download URL' (set to 'Enter URL'). The 'Autoreponder' section includes 'Autoreponder' (set to '--Select--'). The top of the interface has a toolbar with options like 'Discard changes', 'Save', 'Check content', and 'Audience Select audience'.

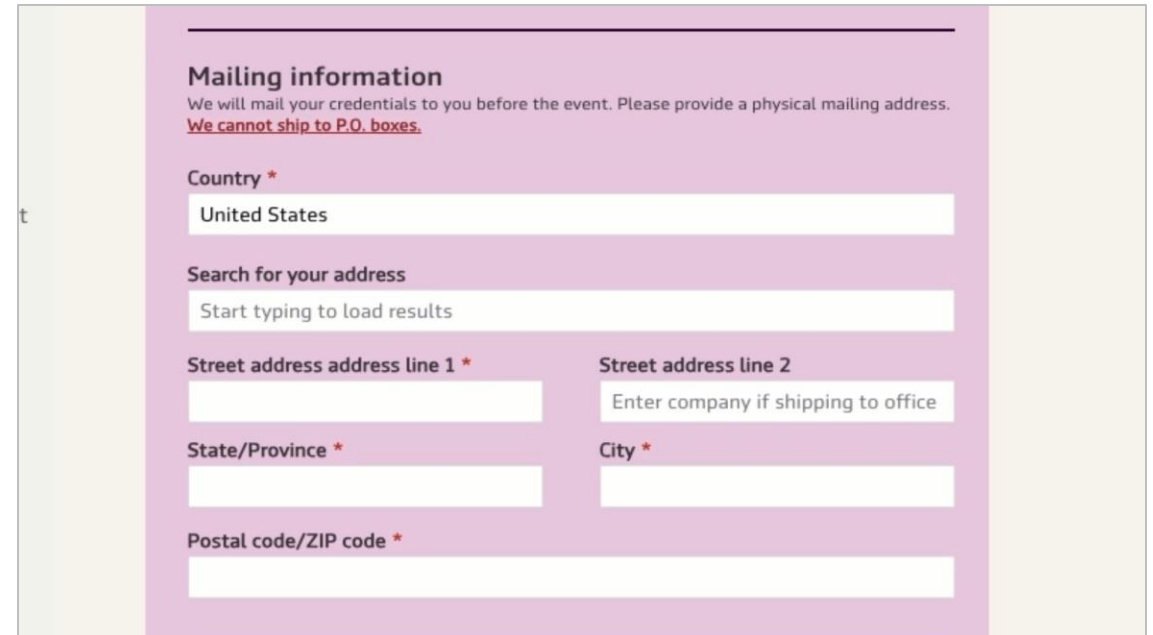
Data

- Form submission tables
- Power Automate Flows
- Privacy settings impact
- Table configuration
- Using data in segmentation



Data

- Form submission tables
- Power Automate Flows
- Privacy settings impact
- Table configuration
- Using data in segmentation
- Integrations

A screenshot of a mailing information form. The form is titled "Mailing information" and includes a note: "We will mail your credentials to you before the event. Please provide a physical mailing address. We cannot ship to P.O. boxes.". The form fields are: "Country *" with a dropdown menu showing "United States"; "Search for your address" with a text input field containing "Start typing to load results"; "Street address address line 1 *" with a text input field; "Street address line 2" with a text input field containing "Enter company if shipping to office"; "State/Province *" with a text input field; "City *" with a text input field; and "Postal code/ZIP code *" with a text input field.

Mailing information
We will mail your credentials to you before the event. Please provide a physical mailing address.
We cannot ship to P.O. boxes.

Country *
United States

Search for your address
Start typing to load results

Street address address line 1 *
[Text input field]

Street address line 2
Enter company if shipping to office

State/Province *
[Text input field]

City *
[Text input field]

Postal code/ZIP code *
[Text input field]

Thank you for attending!

coffee + DUNN



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Coffee + Dunn Sessions

- 50 Tips in 50 Minutes: Dynamics 365 Customer Insights – Journeys
 - Tomorrow 9:45 – 10:45am, Randolph 3-East Tower
- Copilot Wizardry in Dynamics 365 Customer Insights
 - Friday 10:15 – 11:15am, Roosevelt 3AB-East Tower



Coffee + Dunn Resources



Blog



Knowledge Hub





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