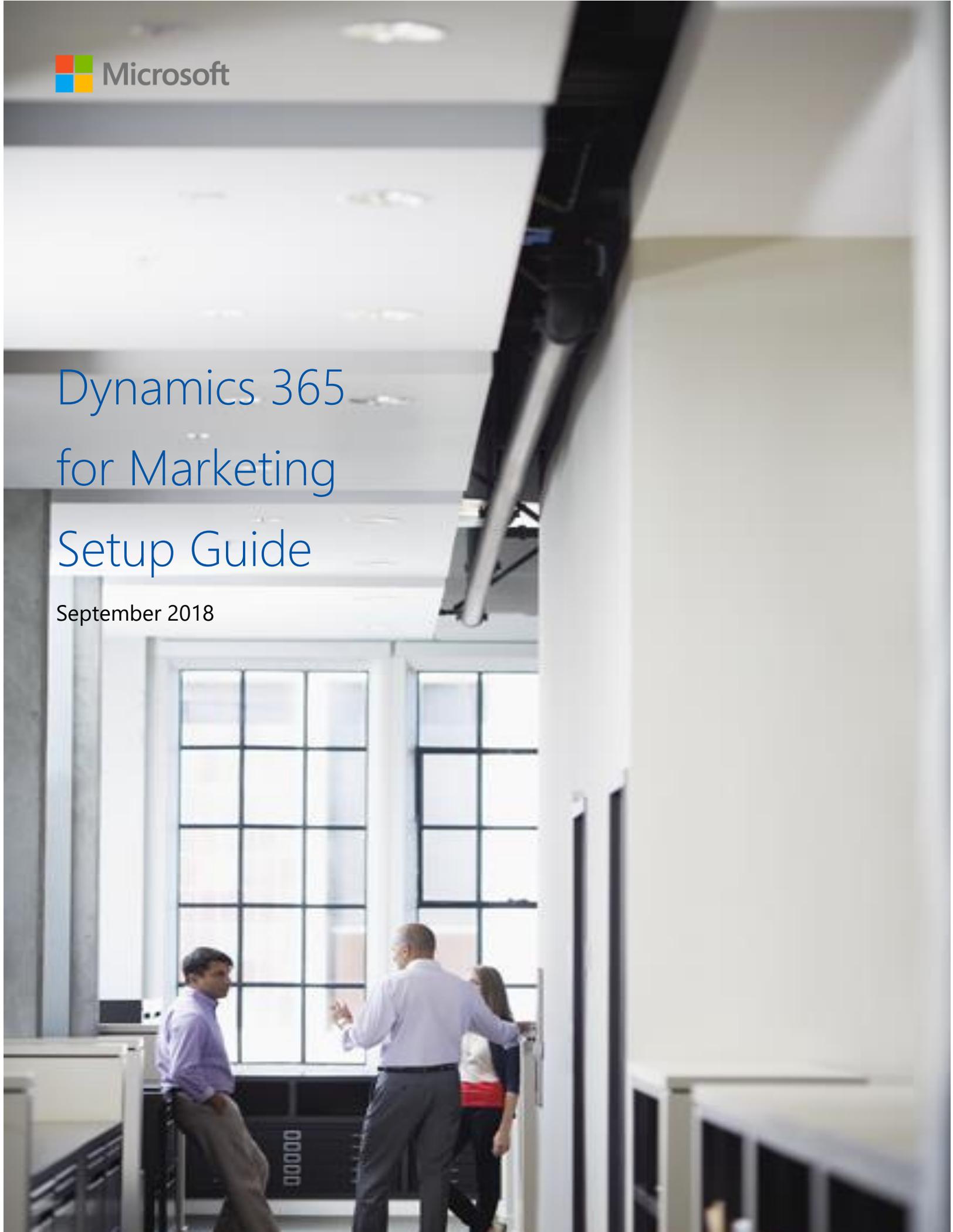




# Dynamics 365 for Marketing Setup Guide

September 2018



# In this document, topics include:

1. [Purchase and Add Dynamics 365 for Marketing](#)
2. [The Setup Wizard](#)
3. [Initial Configuration](#)
4. [Practice Scenarios](#)
5. [Reference](#)

# Purchase and Add Dynamics 365 for Marketing

- Your Dynamics 365 (online) must be version 9.0 or higher
- Make sure you are located in a country/region where the product is [supported](#)

## Purchase and add Dynamics 365 for Marketing

1. Purchase Dynamics 365 for Marketing. A few ways to purchase the Marketing app:
  - a. Go to **Dynamics 365 for Marketing overview** page
  - b. Go to **Office 365 Admin Center > Billing > Purchase Services**
  - c. Contact your Microsoft sales representatives or channel partner
2. Add a marketing app to your Office 365 tenant (NOTE: The marketing app is unconfigured at this stage)

## The Setup Wizard

*After signing up for a trial or purchasing your license for Dynamics 365 for Marketing, your Dynamics 365 for Marketing app is available on your tenant, but not yet configured. You must run the setup wizard to set up and start using the application (Note: most of the settings in the setup wizard will be permanent).*

## Prerequisites and requirements

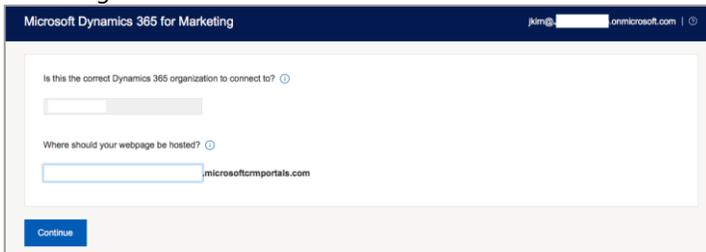
- You must already have an Office 365 tenant
- You must be running Dynamics 365 (online), version 9.0 or higher (supplied together with most trial and stand-alone Marketing setups)
- You must already have a Dynamics 365 license assigned to your user account on your Office 365 tenant
- An unconfigured Dynamics 365 for Marketing app must be available on your tenant
- An unconfigured portal app must be available on your tenant. NOTE: Usually this is included with Marketing, provided no other free portals are already in use on your tenant. More information: [Why do I need a new portal, and how can I get one?](#)
- You must run the setup wizard as a Dynamics 365 user with admin privileges on the Dynamics 365 instance where you are installing Marketing
- You must be located within a country/region where the product is supported. To read the latest list of countries/regions where you can use Dynamics 365 for

Marketing, download the [Microsoft Dynamics 365 International Availability](#) document (PDF)

- Close all other browser windows and tabs before starting
- Clear your browser cache before starting

## Run the setup wizard

1. Set up an unconfigured marketing app
  - a. Go to **portal.office.com**
  - b. Sign in using your administrator account with Dynamics 365 for Marketing license assigned
  - c. Go to the **Office 365 Admin Center**
  - d. Under **Admin centers**, click **Dynamics 365**. Dynamics 365 admin center will open
  - e. Go to the **Applications** tab
  - f. Find a Dynamics 365 for Marketing Application (NOTE: you may have several Marketing apps available for your tenant. In this case, look for the Marketing app that is marked as *Not configured* in the Status column and does not have an instance ID appended to the name)
  - g. Select an unconfigured Marketing app and click **Manage** on the side panel
  - h. The setup wizard will launch
2. Select the Dynamics 365 organization that you want to add Dynamics 365 for Marketing to



- a. If you are not already using any other Dynamics 365 apps, you will setup a new instance
  - b. If you already have an instance, you will be selecting an existing one (it may be already selected if you only have one instance) that you want to add the Marketing app to, or you can create a new one.
3. Enter a **prefix** for your portal URL and enter it in the field provided. All your portals, including marketing pages, subscription centers, event portals, and surveys, are hosted on a Dynamics 365 server which uses a Microsoft-owned domain name, plus the subdomain name that you enter here. Choose a unique subdomain name that visitors will recognize, such as your organization's name, because that is what your contacts and customers will see in the URL
  4. Click **Continue**

5. Read the consent text shown for each checkbox and click in the links to read and understand all the relevant issues. If you agree with the terms, click in the checkbox to indicate your consent

We need your consent to proceed

Data sharing consent  
By enabling this feature, you agree to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 (online) is subject to the [Microsoft Privacy Statement](#). Your use of Microsoft Dynamics 365 for Marketing may require compliance with various laws and regulations. Please direct any questions to the appropriate representative in your organization. For more information please review the [product technical documentation](#).

Email marketing template license terms consent (optional)  
Use of the email marketing templates is optional and subject to these [supplemental terms and conditions](#). By selecting this box you agree to these terms. If you are unable to comply with these supplemental terms, then do not use the email marketing templates.

Surveys terms consent  
Use of the Surveys functionality is optional and subject to these [supplemental terms and conditions](#). By selecting this box you agree to these terms. If you are unable to comply with these supplemental terms, then do not use the Surveys feature.

We also need your organization's physical street address to wrap this ⓘ

All marketing email messages must include the physical street address of the sending organization. Please enter the complete street address here.

6. Enter your **full physical street address** for your organization NOTE: you are required to have a physical street address to legally send marketing emails
7. Click **Setup**. It may take about half an hour for the setup to complete

## Initial Configuration

*To fully setup and utilize the system based on your business needs and requirements, you may walk through this initial configuration section and configure some of the important organization, business management, marketing, event, and other settings. These are recommended initial configuration items. You may skip items or configure further system setting items as needed or required.*

### Organization settings

Settings > Advanced Settings > Organization

*In the organization settings, you may set up user roles, teams, fiscal year, and more. Assign roles to users, add team and team members, and set up the fiscal year for your organization.*

## Manage users

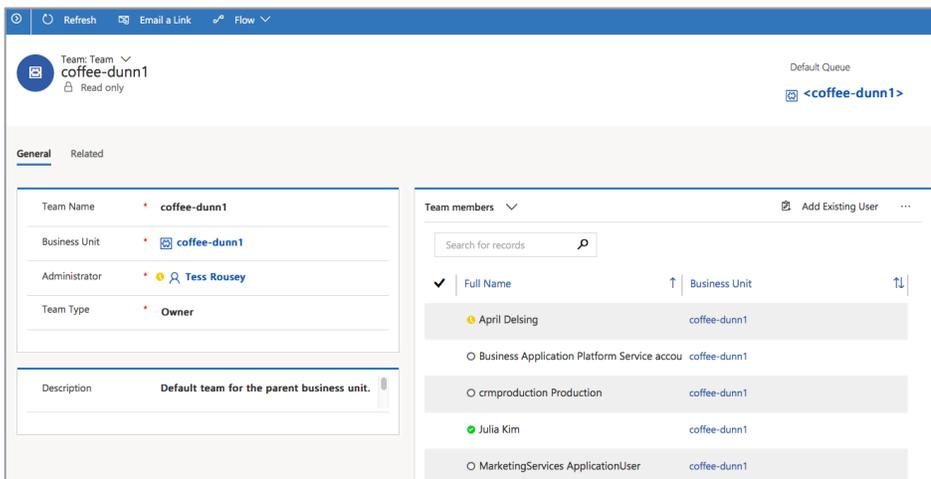
Customization of security roles must be done in Dynamics 365



1. Select User management
2. Select the user you would like to assign a role to, and then on the command bar, select **Manage Roles**
3. In the Manage User Roles dialog box, select the security role or roles you would like for the user or users, and then select **OK**
4. You may also join a team or change the manager of a user

## Manage teams

A team is a group of users who share and collaborate on business records. A user may be associated with multiple teams.

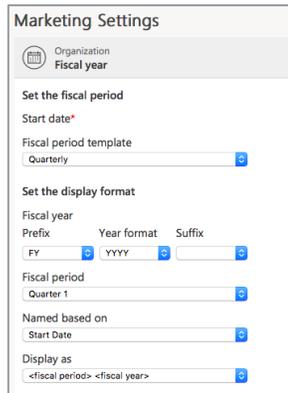


1. Select **Add Team**
2. Enter the details, and then select **Add**
  - a. **Team Name**
  - b. **Business Unit Name:** This default value is your organization name
  - c. **Team Manager:** Select a manager for the team

- d. **Team Administrator:** Select the person who will perform administrative tasks for the team, such as adding or removing members

### Define fiscal year settings

1. Make sure you have the System Administrator security role or equivalent permissions in Dynamics 365 for Marketing
2. Enter information in the text boxes
  - a. In the **Start Date** box, select the date to start the fiscal year
  - b. In the **Fiscal Period Template** drop-down list, select how your fiscal year is divided
  - c. In the **Fiscal Year** drop-down list, select how you would like to display the fiscal year
  - d. In the **Fiscal Period** drop-down list, select how you wish to display the fiscal period
  - e. In **Name Based On** drop-down list, select whether the fiscal year name is displayed on the start or end of the fiscal year
  - f. In the **Display As** drop-down list, select how you would like the fiscal year abbreviation and the year to appear
3. Select **Save**

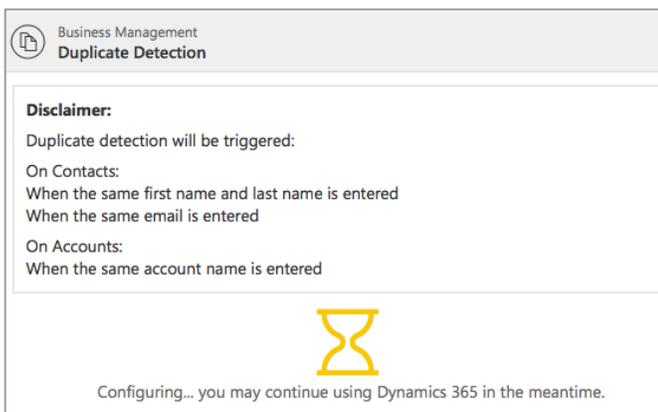


The screenshot shows the 'Marketing Settings' page for 'Fiscal year' configuration. It includes sections for 'Set the fiscal period' (with a 'Start date\*' field and a 'Fiscal period template' dropdown set to 'Quarterly'), and 'Set the display format' (with 'Fiscal year' settings for 'Prefix' (FY), 'Year format' (YYYY), and 'Suffix', and 'Fiscal period' dropdown set to 'Quarter 1'). It also has 'Named based on' (Start Date) and 'Display as' (<fiscal period> <fiscal year>) dropdowns.

### Business Management settings

Settings > Advanced Settings > Business Management

*In the business management settings, you may enable or disable duplicate detection and more. Duplicate detection is disabled by default. You must configure this setting to use the duplicate detection feature.*



The screenshot shows the 'Business Management Duplicate Detection' settings page. It features a 'Disclaimer' section stating: 'Duplicate detection will be triggered: On Contacts: When the same first name and last name is entered, When the same email is entered; On Accounts: When the same account name is entered'. At the bottom, there is a yellow hourglass icon and the text: 'Configuring... you may continue using Dynamics 365 in the meantime.'

### *Duplicate Detection*

Duplicates are not detected when a user merges two records, activates or deactivates a record, or saves a completed activity. Dynamics 365 includes duplicate detection rules for accounts and contacts. The rules are automatically published when duplicate detection is enabled.

- Accounts with the same account name are found
- Contacts with the same first name and last name are found
- Contacts with the same email address are found

*If any of these rules are deleted, duplicate detection will not work as expected*

*If duplicate detection is enabled, duplicates are detected when:*

- **A record is created or updated:** The system checks for duplicates when a user enters or updates records
- **During data import:** When you use the Import Data wizard to bring in contacts or accounts, the wizard detects any duplicate records

### *Disable duplicate detection*

If your system contains a large number of records, checking for duplicates may affect performance. You might want to disable duplicate detection in certain cases.

## Marketing Settings

Settings > Advanced Settings > Marketing Settings

*In the marketing settings, you may configure your landing page details and matching strategies, set up defaults for marketing emails, choose time zone for customer journey, edit customer insights sync items, and enable data protection tools.*

### *Marketing Pages*

Marketing Settings > Landing Pages > select Default Marketing Page Configuration

*This is where you set up a privacy banner, set hosting defaults, and configure defaults for how data submitted through a landing page form is matched to existing contact or lead records.*

MARKETING PAGE CONFIGURATION  
Default Marketing Page Configurati...

General Portal Defaults Related

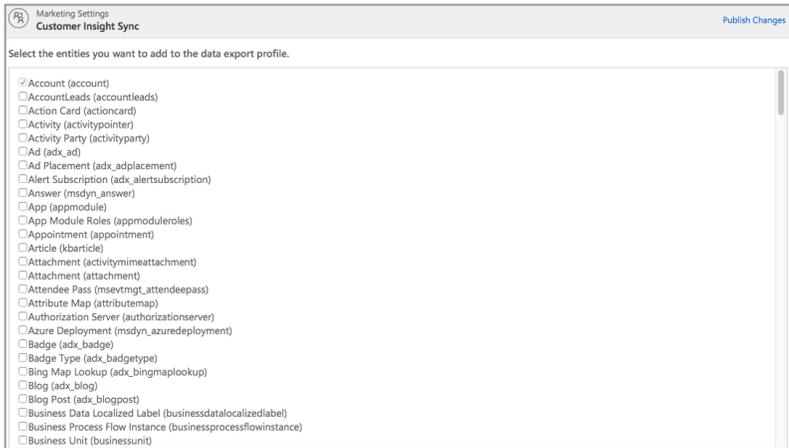
<p><b>General</b></p> <p>Name * <b>Default Marketing Page ...</b></p> <p>Default * <b>Yes</b></p>	<p><b>Contact-Creation Context Capture</b></p> <p>Customer journey * <b>msdyncrm_customerjour...</b></p> <p>Email * <b>msdyncrm_emailid</b></p> <p>Landing page * <b>msdyncrm_marketingpag...</b></p> <p>Landing page form * <b>msdyncrm_marketingfor...</b></p>	<p><b>Default Matching Strategy</b></p> <p>Update contacts/leads <b>Only contacts</b></p> <p>Default contact matching strategy * <b>Default contact m...</b></p> <p>Default lead matching strategy * <b>Default lead matc...</b></p>
<p><b>Privacy Banner</b></p> <p>Insert privacy banner <b>No</b></p> <p>Privacy policy link URL: ---</p> <p>Privacy policy link text: ---</p> <p>Privacy banner text: ---</p>	<p><b>Marketing Page Configuration</b></p> <p>Customer journey * <b>msdyncrm_customerjour...</b></p> <p>Email * <b>msdyncrm_emailid</b></p>	

1. Set **the default (active) configuration set**. There must always be exactly one landing-page configuration that is set as the default
2. Set up a **privacy banner for marketing pages**. It is recommended that you include a privacy banner on all your marketing pages. The privacy banner will be applied to all existing and newly created marketing pages, except for the published ones
3. The **Contact creation context capture and Lead creation context capture** sections show where various types of information about the marketing context are stored when a submission results in a new contact or lead record
4. Under **the Default matching strategy** section, you may set defaults for whether to create and update leads and or contacts, and how values are matched against the existing record and if not matched, to create a new record. Each default contact matching strategy and lead matching strategy may be created or edited in Matching Strategy under Marketing settings
5. Set **matching strategies for leads and contacts**. Matching strategies define how page submissions are matched to existing contacts or leads when deciding whether to update an existing record or to create a new one
6. Set **portal defaults**.
  - a. Marketing Page Configuration > Portal Defaults tab
  - b. If you have any other portal account, you may set that up here. Otherwise, the default will be the event portal that was provisioned when you signed up for Dynamics 365 for Marketing

### Customer insights sync

Marketing Settings > Customer insights sync

*Dynamics 365 for Customer Insights is an Azure-based service that provides analytical tools for working with customer records. By default, some values are selected.*



In this area, you may choose which database entities from Dynamics 365 for Marketing to replicate to Customer Insights. This feature is resource-intensive. For optimal performance and functionality, choose only the entities you need. Once you add a new entity to Customer Insights, it will continue to sync and consume storage space there and cannot be removed. You should only add those entities you are sure you will need

### *Matching Strategy*

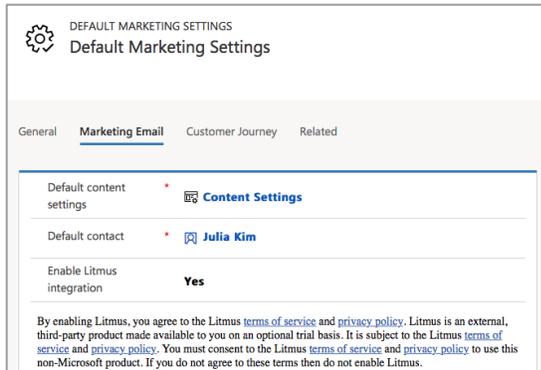
Refer to Marketing Pages

### *Default marketing settings*

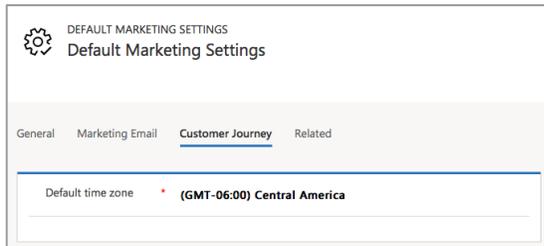
*Marketing Settings > Default Marketing Settings > Select New*

*This is where you set different defaults used throughout the app. You can store as many settings sets as you want, but like other settings, only the one marked as Default is active.*

1. The **Marketing email** tab: Set defaults that apply to your marketing email messages. You will always be able to override these defaults for individual messages, but it will be more convenient for users if you set the defaults to their most-used values. These values appear for the preview feature

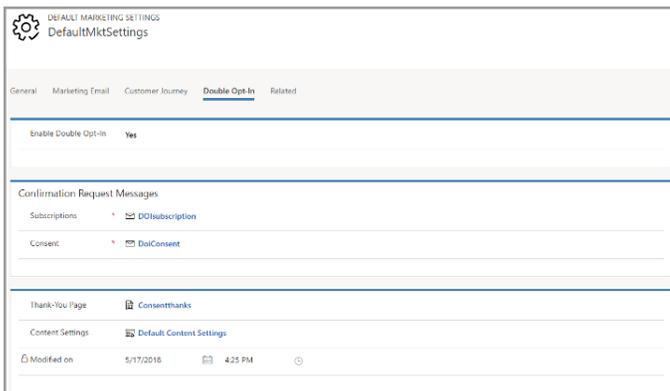


2. The **Customer journey** tab: Choose the default time zone that you will use when starting and stopping your customer journeys



### Setup double opt-in

The double opt-in process helps make sure that contact's enrollment in subscription list is intentional and the supplied email address is legitimate and functional. When contacts sign up for a new subscription list, the contact will be asked to confirm the request by clicking on a link sent to the email address.



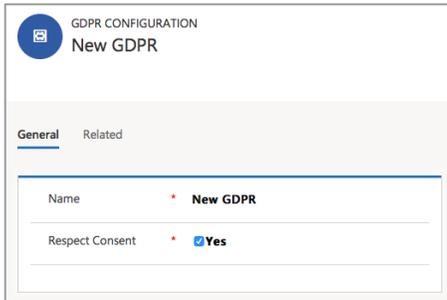
1. Create a subscription confirmation-request message
  - a. Navigate to the Marketing app
  - b. Go to **Marketing Emails** under **Marketing Execution**
  - c. Select **New**
  - d. In the **Select an email template** window, go to the **Purpose** tab and choose **Double opt-in, email base confirmation** from the drop-down list
  - e. Select the **diamante** template. This template includes:  
*Note: this template is to create a subscription confirmation-request message. If you want to create an increase consent confirmation-request message, choose **custonaci***
    - i. Default content that includes Handlebars expressions to place the recommended dynamic content
    - ii. A confirmation button preconfigured with the required target URL
    - iii. The **Content type** set to **Confirmation request**
    - iv. The **Legal designation** set to **Transactional**
  - f. Design the message as needed
  - g. Check for errors and **Go Live**
2. Create a thank-you page for each type of confirmation
  - a. Go to **Marketing Pages** under **Internet Marketing**
  - b. Select **New**
  - c. In the **Select a marketing page template** window, select a Thank-you templates provided out-of-the-box or a blank page to get started
  - d. Design the thank you page as needed
  - e. Check for errors and **Go Live**
3. Set up and enable double opt-in on your site
  - a. Go to **Settings > Advanced Settings > Marketing Settings > Default marketing settings**
  - b. Open the active default settings record
  - c. Open the **Double opt-in** tab on the **Default marketing settings** page
  - d. Make the following settings:
    - i. **Enable double opt-in:** Set to **Yes** to enable double opt-in on your instance. Set to **No** to disable it
    - ii. **New subscription:** Identify the marketing email message you created to send to contacts when they add themselves to a subscription list
    - iii. **Increase consent:** Identify the marketing email message you created to send to contacts when they submit a request to increase their consent level
    - iv. **Content settings:** Identify the content-settings record you chose to use for all double opt-in messages
    - v. **Thank-you page for subscriptions:** Select a marketing page to show to contacts after they confirm a new subscription

- vi. **Thank-you page for consent:** Select a marketing page to show to contacts after they confirm an increase of their consent level
- e. **Save** at the bottom right corner of the page

## Data Protection Tools

Marketing Settings > Data protection tools > Select New

Enable data-privacy features of Dynamics 365 for Marketing. These features currently focus on helping organizations comply with GDPR regulations in the European Union. The GDPR features are disabled by default so you need to create a new GDPR record to enable the features



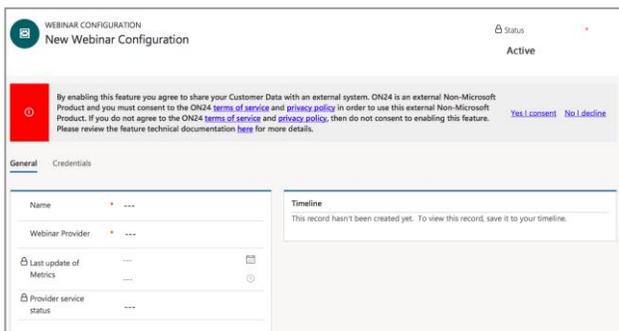
## Event Management

Settings > Advanced Settings > Event Management

The Event management settings let you set up the connections to your webinar provider accounts. You must set up at least one webinar configuration to enable the webinar feature.

## Webinar Configurations

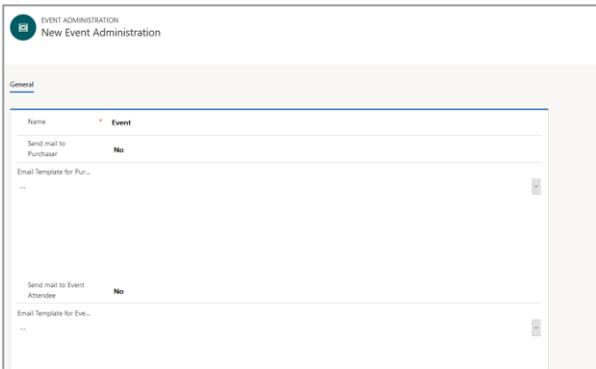
Currently, ON24 is the only webinar provider that can be configured Out-Of-Box



1. Set up one or more accounts with a webinar provider
2. Configure Dynamics 365 to work together with each account so that it can sign in, register attendees, and fetch the URLs that attendees can use to join the webinar itself
3. To set up your webinar provider:
  - a. Go to **Settings > Advanced settings > Event management > Webinar configurations**. Here you'll see a list of existing configurations (if any), and tools for adding new ones. No configurations are provided out of the box
  - b. To edit an existing configuration, select it from the list; to create a new configuration, select **New**
  - c. Make the following settings:
    - i. **Name**: Enter a name that you and others will recognize
    - ii. **Webinar provider**: Select On24  
*If you are setting up a new configuration, or if you need to update your account credentials for an existing configuration, open the Credentials tab and set Update credentials? to Yes and then enter your sign-in credentials for the account*

## Event Administration

Here you can set up auto-generate email options and templates for event registrants



The screenshot shows the 'EVENT ADMINISTRATION' interface with the title 'New Event Administration'. The 'General' tab is active. The form includes the following fields:

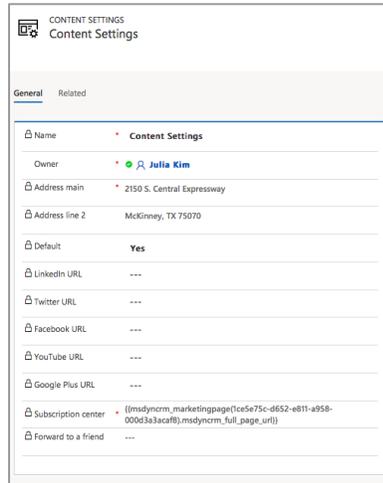
- Name**: Event
- Send mail to Purchaser**: No
- Email Template for Pur...**: --
- Send mail to Event Attendee**: No
- Email Template for Eve...**: --

## Content Settings

Marketing > Templates > Content Settings

*Content settings hold common values, such as subscription center and physical mailing address, that you can place into an email message as dynamic text by using assist-edit. Upon setting up Dynamics 365 for Marketing, a default content setting should automatically be populated. You may either edit the existing one or create a new one. You may create as many content settings as you need. If you want to edit an existing "Live" content settings, you must stop and edit the content settings, then make sure to go live again.*

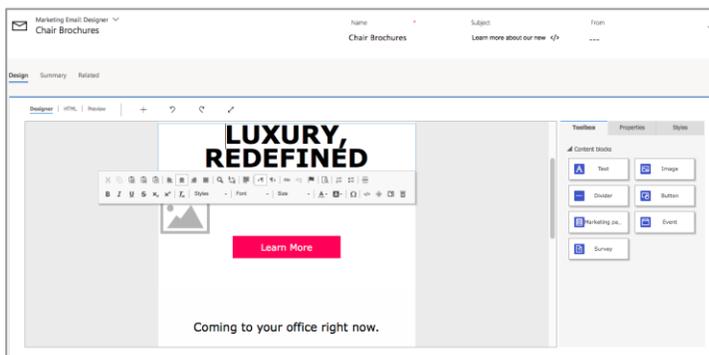
1. Create a new content setting or edit an existing one
2. Fill out the required fields. Fill out other information as needed
3. **Save, Check for Errors, then Go Live**



## Suggested 5 Features to Try

Try the following features to familiarize yourself with the solution. Navigate to Dynamics 365 for Marketing. Click on the hyperlink for detailed instructions.

1. Create a [Marketing Email](#)  
Marketing > Marketing Execution > Marketing Emails

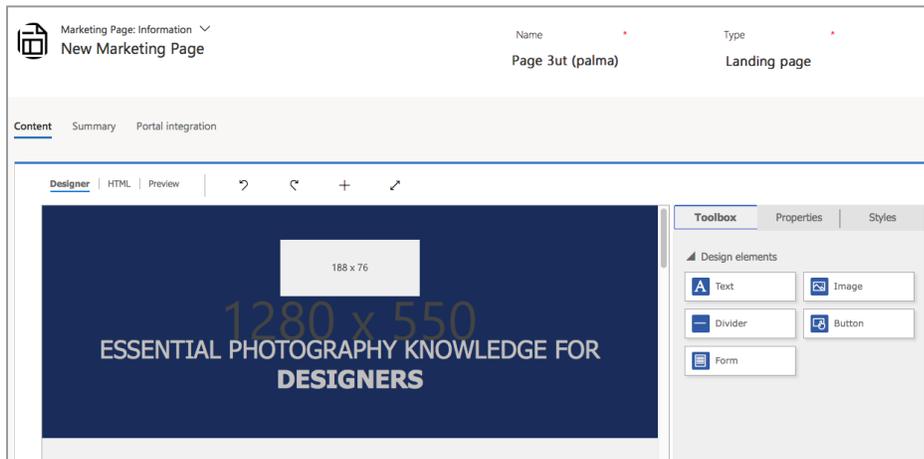


- a. Create a new marketing email using a pre-designed template
- b. Design your marketing email. Verify the proper physical address and subscription center are included in the email using Assist Edit. Preview your marketing email

c. Check for Errors. Make your marketing email Go Live

2. Create a [Marketing Form](#) and [Marketing Page](#)

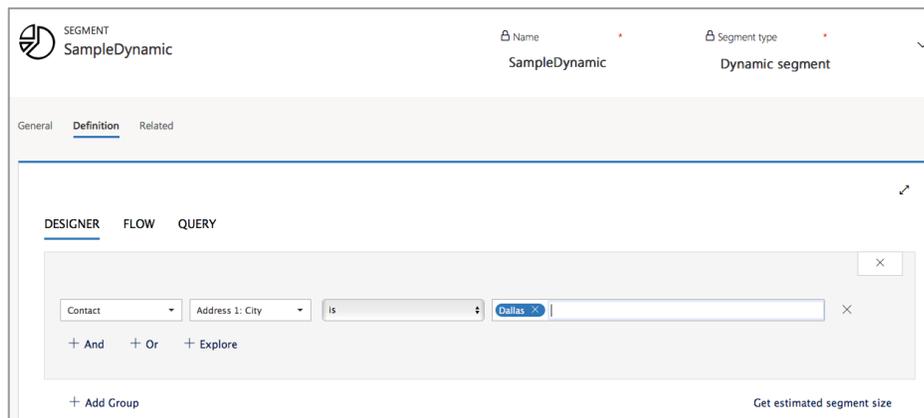
Marketing > Internet Marketing > Marketing Forms / Marketing Pages



- Create a new marketing form using a pre-designed template
- Design your marketing form. Verify the fields are mapped correctly. Go Live when ready
- Create a new marketing page using a pre-designed template
- Design your marketing page. Include a marketing form. Go Live when ready

3. Create a [Segment](#)

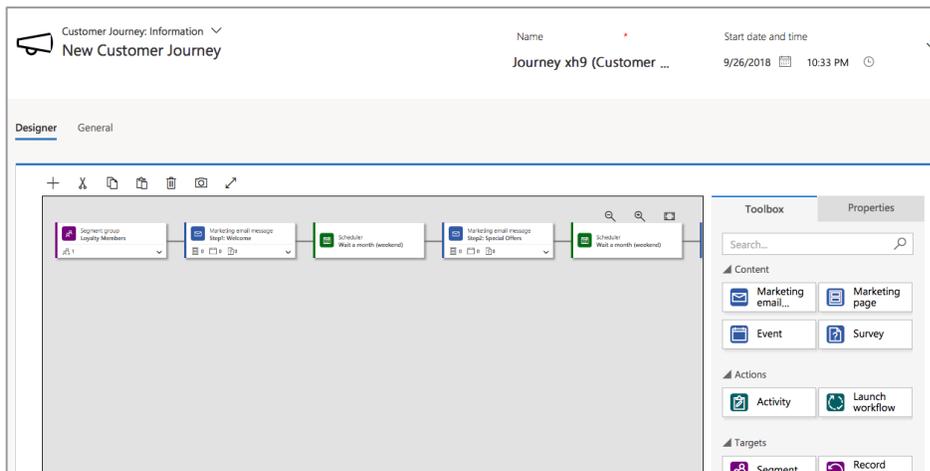
Marketing > Customers > Segments



- a. Create a new dynamic segment. Segment using Designer, Flow, or Query. Go Live when ready
- b. Create a new static segment. Find a contact with your email address using filter. Select the Contact. Add any other contacts as desired. Go Live when ready

4. Create a [Customer Journey](#)

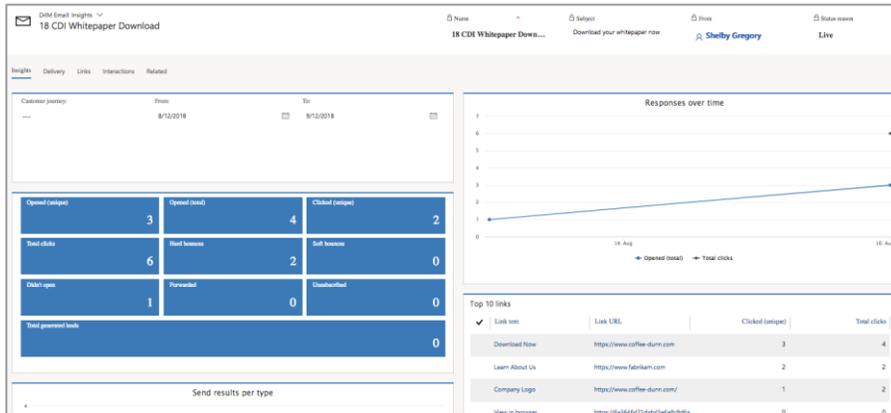
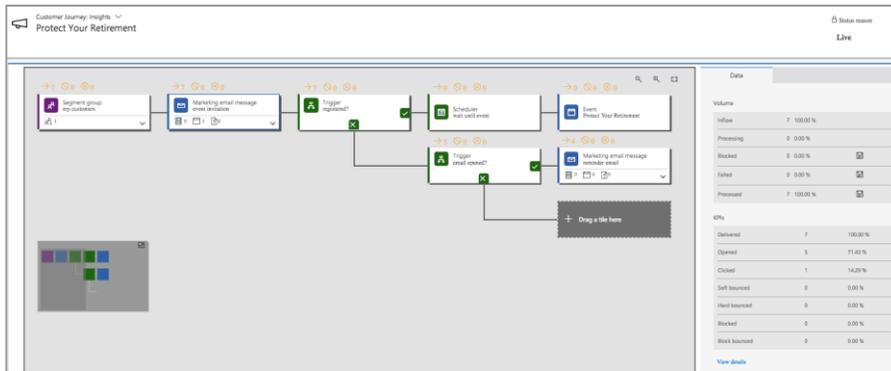
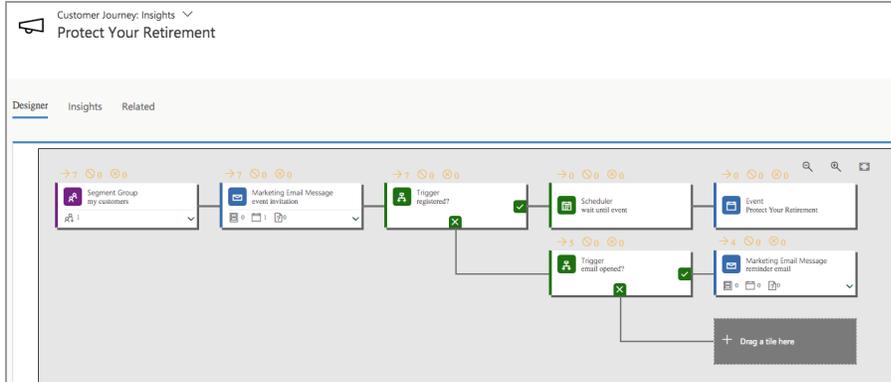
Marketing > Marketing Execution > Customer Journeys

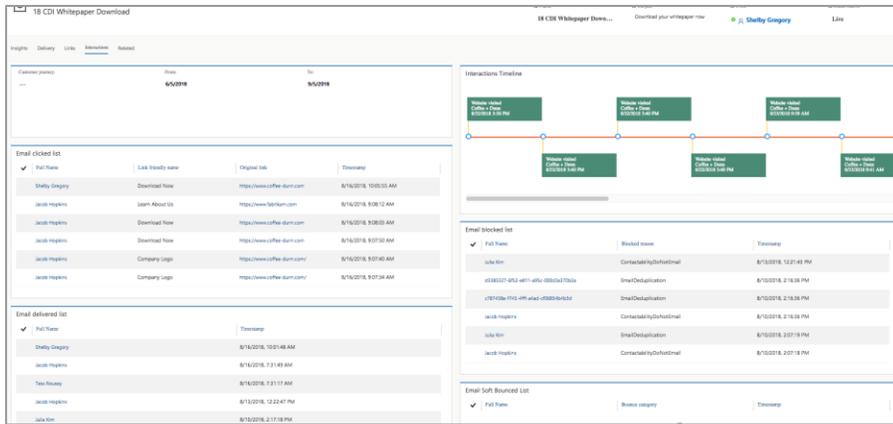


- a. Create a new customer journey using a pre-designed template
- b. Design your customer journey. Fill out properties of each of the content/action/target/flow control tiles
- c. Make sure to include a segment that includes a contact with your email address
- d. Navigate to the General tab
- e. Fill out the Start/End date and time
- f. Set the Time zone
- g. Verify the appropriate content settings is applied
- h. Add additional information as needed
- i. Check for Errors. Make your customer journey Go Live
- j. Verify you receive an email. This may take a few minutes
- k. Open and click around the email you received to generate insights

5. View [Insights](#)

Customer Journey > Insights Tab





Wait 15+ minutes to move onto next step

- a. Go to the Insights tab of the customer journey
- b. Review results of the customer journey
- c. Navigate to the Marketing homepage to view Customer Journey Dashboard
- d. Verify your customer journey information is present
- e. Navigate to the marketing email that is included in the customer journey
- f. Go to the Insights tab of the marketing email
- g. Review results of the marketing email
- h. If you have marketing form, marketing page, and other contents in the customer journey, review the results on each entity's insights

# Update or Delete a Marketing app

Update your Marketing app

*Dynamics 365 for Marketing will have major updates available every six months. In addition, bug fixes are released often. It is important to ensure your application is up to date.*

1. Go to **Dynamics 365 admin center**
2. Select the **Application** tab
3. Select a configured Dynamics 365 marketing Application you want to update
4. Click the **Manage** button
5. Look for **Update packages**. If the update button is not shown, no updates are available

6. Click **Update packages** if the button is shown

### To uninstall your Marketing app...

1. If you have sample data installed, remove it
2. Remove all customer journeys that include launch-workflow and/or record-updated tiles
3. Go to the **Dynamics 365 admin center**
4. Select the **Applications** tab
5. Choose a Dynamics 365 Marketing Application you wish to delete
6. Click the **Manage** button
7. Click on **Uninstall Marketing from this org** under Other actions
8. Follow the instructions on your screen to confirm and complete the uninstall
9. Remove Marketing solutions in Dynamics 365. Go to **Dynamics 365**
10. Go to **Settings > Customizations > Solutions**
11. Find each of the following solutions and remove them, one at a time. To remove a solution, select its check box, and then select **Delete** on the command bar
  - MicrosoftDynamics\_MktEmailTemplates
  - MicrosoftDynamics\_MktIntegration
  - MicrosoftDynamics\_MktPageTemplates
  - MicrosoftDynamics\_MktLeadGenLink
  - MicrosoftDynamics\_MktConsentManagement
  - MicrosoftDynamics\_MktQuotaInfo
  - MicrosoftDynamics\_MktLeadManagement
  - MicrosoftDynamics\_MktPortalsLink
  - MicrosoftDynamics\_MktVocLink
  - MicrosoftDynamics\_MktEvtMgmtLink
  - MicrosoftDynamics\_Marketing
  - MicrosoftDynamics\_MarketingAnchorSolution
  - MicrosoftDynamics\_EvtMgmtVocLink
  - MicrosoftDynamics\_EvtMgmtPortalsLink
  - MicrosoftDynamics\_EventManagement
  - MicrosoftDynamics\_EventManagementAnchorSolution
  - LinkedInLeadGenIntegration

# References

*Purchase a production version of marketing* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/purchase-marketing>

*Run the setup wizard* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/purchase-setup>

*Organization settings* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/organization-settings>

*Business management settings* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/business-management-settings>

*Marketing settings* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/marketing-settings>

*Event management settings* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/events-settings>

*Content settings* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/set-up-subscription-center#identify-a-subscription-center-in-content-settings>

*Keep marketing up to date* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/apply-updates>

*Uninstall marketing* – <https://docs.microsoft.com/EN-US/DYNAMICS365/CUSTOMER-ENGAGEMENT/MARKETING/uninstall-marketing>

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