Dynamics 365 Marketing- Customization, Development and Consulting Practice

Cognitive Convergence is Subject Matter Expert in Office 365, Dynamics 365, SharePoint, Project Server, Power Platform: Power Apps-Power BI-Power Automate-Power Virtual Agents.
Our Microsoft Dynamics 365 Marketing Consulting, Development, Customization, Integration services and solutions, can help companies maximize business performance, overcoming market challenges, achieving profitability and providing best customer service.

Contents

DYNAMICS 365

Microsoft Dynamics 365 is a cloud-based business applications platform that combines components of customer relationship management (CRM) and enterprise resource planning (ERP), along with productivity applications and artificial intelligence tools.

DYNAMICS 365 ONLINE VS ON-PREMISES

There are several significant differences between Microsoft Dynamics CRM 365 on-premises vs online. Each model should be carefully examined in deciding the best model for business. Microsoft CRM on-premises was released in 2003 and went through several versions (1.2, 4, 2011) before the online model was released in the 2013 version.
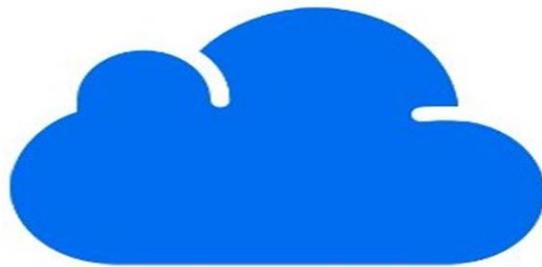
Online

The online version is a true cloud/Software as a Service (SaaS) application. SaaS applications are essentially rental models; monthly fee is paid to use the application. This makes the online version an opex or operating expense vs a capex or capital expense. No hardware or supporting software needed – Microsoft Dynamics CRM and 365 Online require no infrastructure hardware or software, users simply run the application through a browser, the Outlook application or mobile application.
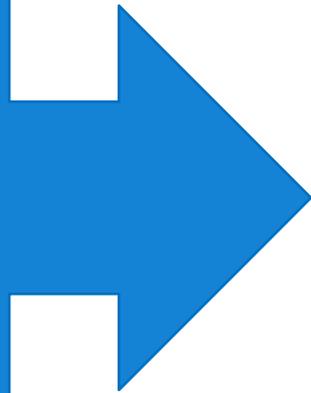
On-Premises

Microsoft Dynamics CRM & 365 On-Premise gets installed on servers either in data center or at a hosting partners. The on-premise version is a capex or capital expense; need to pay for the licensing upfront (or over 3 years via the interest free spread pay option Microsoft offers). The hardware and infrastructure related costs are also capex. The on-premise model requires Microsoft SQL server, Windows Server, Internet Information Services and additional supporting requirements.
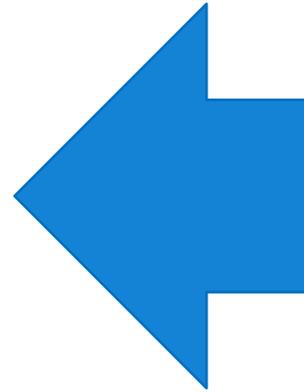
DYNAMICS 365 MODULES/APPS

Dynamics 365 offers users several modules they can choose from to build a system that fits their unique needs. Each module/app ring-fences an area of CRM or ERP functionality and can be used in conjunction with a wider package of apps, or on its own.

Organizations can choose from the following Microsoft Dynamics 365 applications and features:

1. Customer Insights
2. Customer Service
3. Field Service
4. Finance and Operations
5. Marketing
6. Project Service Automation
7. Commerce / Retail
8. Sales
9. Human Resource
10. Business Central
11. Connected Store
12. Customer Service Insights
13. Customer Voice
14. Dynamics 365 Guides
15. Product Visualize
16. Remote Assists
17. Fraud Protection
18. Intelligent Order Management
19. Layout
20. Talent
21. Supply Chain Management

MARKETING

Microsoft Dynamics 365 Marketing is a marketing solution that unifies customer information, provides marketing automation features such as lead scoring and customizable email templates, and allow to create personalized customer journeys.

Numerous companies across business domains already employ marketing automation extensively and witness truly great results:

+25% in lead volume

+35% in lead conversion
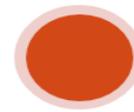
+45% in marketing ROI

Dynamics 365 Marketing is a marketing automation application that helps turn prospects into business relationships. The app is easy to use, works seamlessly with Dynamics 365 Sales, and has built-in business intelligence. Use Dynamics 365 Marketing to:

Create graphical email messages and online content to support marketing initiatives

Customizable templates for emails and landing pages amplify your digital voice. Intuitive drag-and-drop design tools simplify content creation, from personalizing the message to setting up lead scoring.

Design interactive customer journeys to nurture leads with personalized experiences

Use the drag-and-drop journey designer to create an automated, multi-channel campaign that sends personalized email messages, generates follow-up activities, launches workflows, and more. Each contact in the target group travels down a customized path that reacts to their interactions and identifies your best prospects. Track campaigns and analyze results to build profitable long-term relationships.

Tap into LinkedIn's business prospects

Quickly target and connect with the right LinkedIn audiences by importing leads generated with LinkedIn's lead tools directly into Dynamics 365 marketing.

Share information across teams

Securely share information about leads and contacts across your business and understand how every interaction affects your results. Connect sales and marketing processes to automate follow-ups and track the progress of every lead.

Know your leads better

Develop a deeper understanding of your market with a 360-degree view of every lead and customer. Connected processes and a single source of information ensure that both sales and marketing have the latest data, including key contacts, recent activities, past purchases, and open opportunities.

Organize and publicize events

Keep all the information about your event venues, logistics, ticketing, sessions, speakers, sponsors, and more in one place so your whole team can coordinate while working on them. Host webinar events with ease using built in Microsoft Teams integration. Then generate an online event website where attendees can review event information and register online. Integrate your events into your marketing email messages and customer journeys to help get the word out.

Analyze and document your marketing return on investment (MROI)

Use dashboards and reports to track the performance of your marketing initiatives, and to identify your best lead sources and marketing activities. Bring together sales and marketing results to track and increase their impact on your business.

Prioritize leads for more wins

Set up automated lead-scoring rules that automatically identify your hottest leads based on how they interact with your events and customer journeys. As soon as a lead meets an agreed-on sales-ready score, the system automatically routes it to a salesperson to follow up while the lead is still hot. Route the most promising leads to sales when they reach an agreed-on sales-ready grade.

Make survey results more actionable

Easy-to-create surveys help you gather actionable feedback from customers. Understand individual customer needs and expectations so you can grow relationships and revenue.

Configure and expand the application

Customize the application to fit your specific business needs. Make basic customizations by using tools built right into the app. Expand its capabilities and add new features by installing third-party packages from our thriving marketplace—Microsoft AppSource. And it's easy to connect with Dynamics 365 partners to get expert help. The Marketing app is built on the same platform and database as the Sales app, so both teams share the same records, and customizers can leverage their existing knowledge when adding custom features.

We have been providing crucial assistance to businesses of all sizes, offering them the benefits of its CRM expertise. Alongside consultations as to which CRM solution is the best for you.

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KEY COMPONENTS OF DYNAMICS 365 MARKETING

Microsoft Dynamics 365 Marketing claims to be an all-encompassing marketing application. Indeed, its functionality is sufficient to conduct multichannel marketing activities, personalize communication with customers, evaluate and continuously improve marketing performance. The app offers several solutions and some of them also come as add-ons for other Dynamics 365 products.

Core Marketing

Provides email marketing, customer journeys, behavior tracking, lead scoring, marketing pages, and more. These features form the core of the Marketing app and are unique to Dynamics 365 Marketing.

Event Management

The Event Management functionality allows centralizing and monitoring all event-related information. Organize and promote in-person or webinar events, which include an online portal that attendees can use to review the event schedule and speakers, and to register for the event. This feature is currently available only with Dynamics 365 Marketing.

Voice of The Customer

Voice of the Customer provides a possibility to launch online surveys and analyze their results. This feature is bundled with the Marketing app but is also available separately as an add-on for other Dynamics 365 products.

Dynamics 365 Customer Voice

Create online surveys and analyze the results. This feature is bundled with the Marketing app but is also available separately as an add-on for other Dynamics 365 products.

Dynamics 365 Connector for LinkedIn Lead Gen Forms

Dynamics 365 Connector for LinkedIn Lead Gen Forms imports leads generated with LinkedIn's lead tools into Dynamics 365. This feature is bundled with the Marketing app but is also available separately as an add-on for other Dynamics 365 products.

Dynamics 365 Portals

Dynamics 365 portals give the audience (whether customers or internal team) an online space to communicate and collaborate. The Marketing app can use Dynamics 365 Portals to publish its event website, marketing pages, and online surveys. All these features are fully integrated and work together to create a comprehensive marketing solution.

HOW DYNAMICS 365 MARKETING TRANSFORMS BUSINESS PROCESSES

Covering the app functionality is essential to give a general overview. Now, let's will focus on translating core functionality into the business language to show exactly what business challenges Microsoft Dynamics 365 Marketing solves and what benefits it provides.

Centralized marketing information

When team members share one source of company marketing data, they are less dependent on each other for exchanging and updating information. Having all the details of marketing activities at hand, marketing teams work more coherently and effectively.

Personalized customer communication

Dynamics 365 Marketing delivers customer segmentation to tailor communication to customers' needs and interests. Before launching a campaign, marketers think over its target audience, create a relevant segment and win customers' trust by communicating with them at a new quality level.

Customer journey mapping

Customer Journeys in Dynamics 365 Marketing helps in achieving automation of daily processes that can be triggered without the direct participation of marketing team particularly valuable. Imagine that the team members have a board game where they map out a customer journey from different elements (customer segments, actions, triggers) and decide how the journey unfolds depending on a customer's reaction to a marketing action.
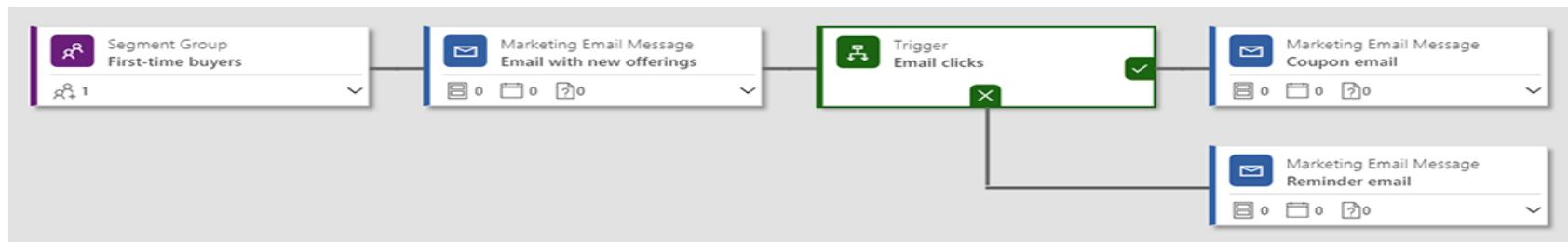
Events as a new marketing channel

Don't overlook an interesting way to showcase products or services – events. Some of the possible ideas are exhibitions, lectures, runway shows, and presentations.

Informed marketing decisions

Analytics is the key to understand how marketing activities resonate with the audience, what works best for them and what can be excluded from the marketing strategy. Dynamics 365 Marketing tracks KPIs for its every unit (email management, customer journeys, etc.) to provide insights into customer behavior and lead organizations to data-driven marketing solutions.

On-brand email templates

Organizations can optimize the process of launching future marketing campaigns and customize the templates in line with their corporate style from the very start. When creating emails is not a time-stealer anymore, the marketers feel inspired to diversify email campaigns and tailor communication to different customer situations.

CUSTOMERS MIGHT EXPECT THESE VERY EMAILS RIGHT NOW

- *A welcome email.*
- *A newsletter.*
- *Order and shipping confirmation.*
- *Event registration.*
- *A discount email.*
- *An upsell email.*
- *An abandoned shopping cart reminder.*
- *A win-back email.*
- *A feedback request.*
- *A customer surveys.*
- *Holiday greeting.*

A possibility to listen to customers

Dynamics 365 Marketing has a solution to gain first-hand customer feedback – Voice of the Customer. There, surveys can be created that can be further integrated with events, emails, and customer journeys. A customer's survey responses not only reveal possible flaws and serve as growth points for a business, but they also can be of great help while processing this customer's service requests and cases.

Lead scoring automation

The process of generating and nurturing leads gets more effective. With an opportunity to set lead-scoring models, organization have the Microsoft tool generating leads from marketing activities and scoring them automatically depending on their activities, interactions or over time. Additionally, Dynamics 365 Marketing has a connector to LinkedIn Lead Gen enabling to collect leads from ads on LinkedIn.
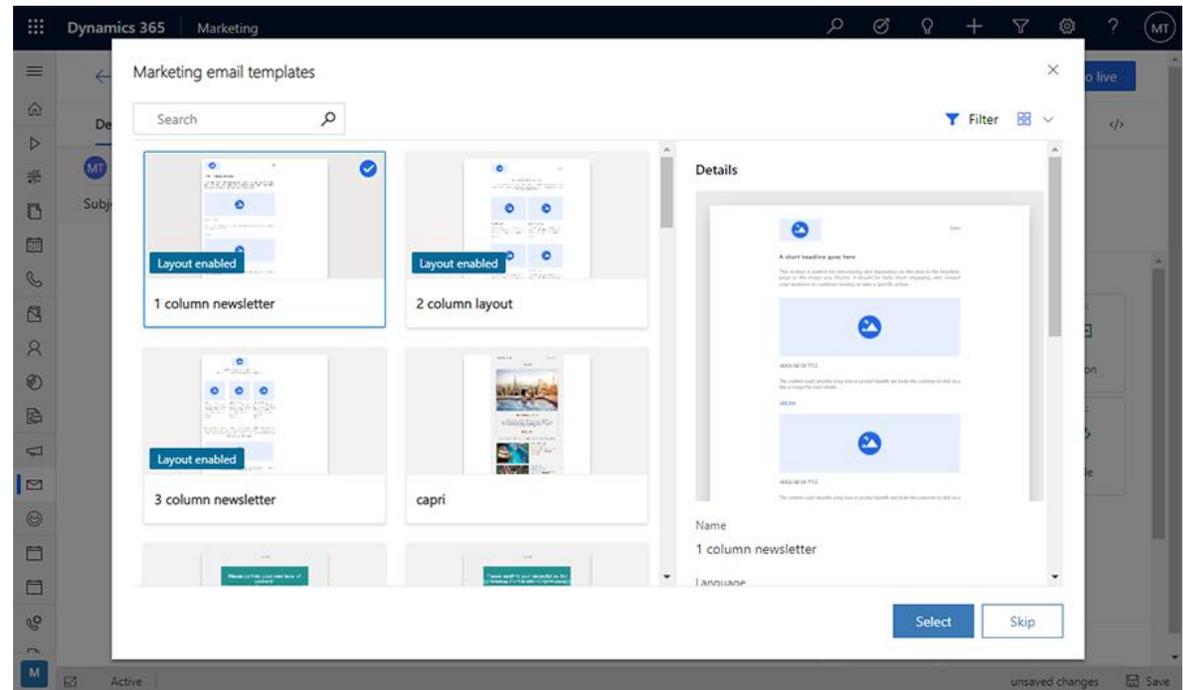
DESIGNING EMAIL FOR EFFECTIVE MARKETING

Email is a key component of most online marketing campaigns. Use the drag-and-drop marketing-email designer to create attractive messages quickly, based on professional, customizable templates. All templates are carefully designed to look great on a variety of devices, platforms, and email clients.

Design Features

Key marketing email design features include:

➢ Simple, no-code, drag-and-drop content designer

➢ Professional email templates to speed up email creation

➢ General and client-specific email previews

➢ Seamless integration with Litmus, a third-party service that specializes in generating pixel-perfect previews that show how your messages will look on nearly any combination of clients, form factors, and orientations

➢ HTML code editor for adding advanced customization and dynamic content, easy collaboration between power users and business users, and importing templates and designs from other systems

➢ Detailed open, click, and forward results for each message

➢ Heatmap, location maps, and other advanced visualizations of email results

When you create a new message, you'll start by choosing a template that establishes a column layout and, optionally, a complete initial graphic design. The content designer provides a canvas with an editable preview and a tabbed toolbox for adding new design elements (like images, buttons, or text boxes), configuring selected design elements, and applying styles. When working with text elements, you'll get an inline toolbar for applying local text styling and adding dynamic content, like mail-merge fields.
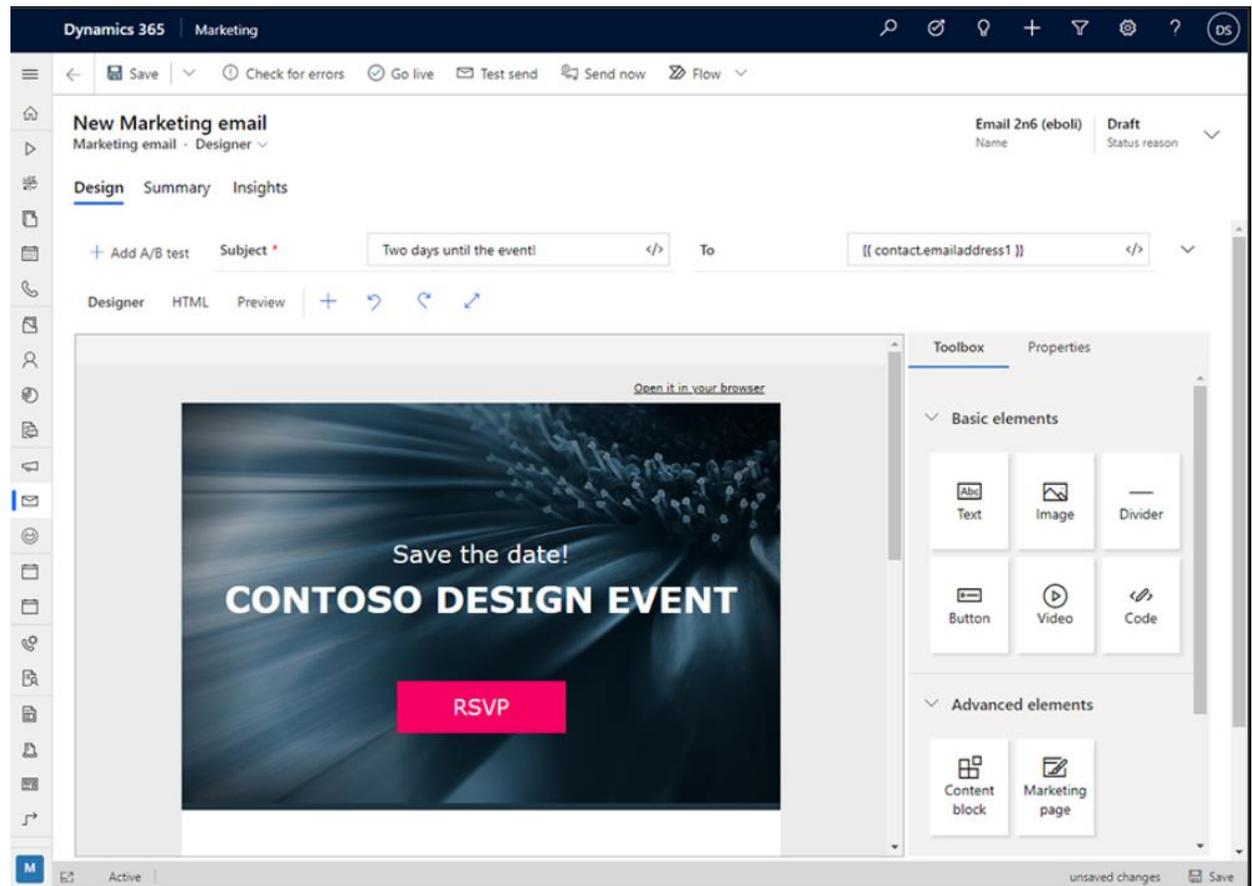
MARKETING PAGES TO CONTACT CUSTOMER ONLINE

Create and publish professional-looking landing pages to capture website visitors as contacts or leads. Each landing page typically includes a form that captures data straight into your Dynamics 365 database, and can also include promotional text, images, links, and other information.

Other types of marketing pages include subscription centers, which enable contacts to manage their mailing list subscriptions, and forward-to-a-friend pages, which enable contacts to share your marketing messages with their colleagues.

Design your marketing pages by using the graphical, drag-and-drop content designer, which works just like the email designer. When your page is ready, publish it to make it available to users on the internet. The system uses the standard Power Apps portals feature to publish and operate all marketing pages.

Marketing Page Features

Key marketing page features include:

➢ Simple, no-code, drag-and-drop designer to create and publish landing pages that include lead or contact forms
➢ Consistent content-editing experience for emails, landing pages, and forms
➢ Ready-to-use form and page templates
➢ Prospect behavior tracked on landing pages to analyze performance and score leads
➢ Subscription center and forward-to-friend pages to support email marketing
➢ Tight integration with customer journeys, email marketing, and lead scoring
➢ In-browser preview showing how your page will look on various screen sizes and orientations
➢ HTML code editor for advanced customization with no restrictions (optional)

AUTOMATED – INTERACTIVE CUSTOMER JOURNEYS

Customer journey orchestration lets marketers create multiple-step, multichannel marketing campaigns that target a specific segment, deliver marketing email messages, respond to contact interactions, launch Dynamics 365 workflows, and more.

When creating or editing a journey, you'll assemble a pipeline by selecting the plus buttons on the canvas to open the in-place editor, which lets you choose various types of journey tiles. You configure each tile in the pipeline by selecting it and editing the properties in the pane on the right side of the page.
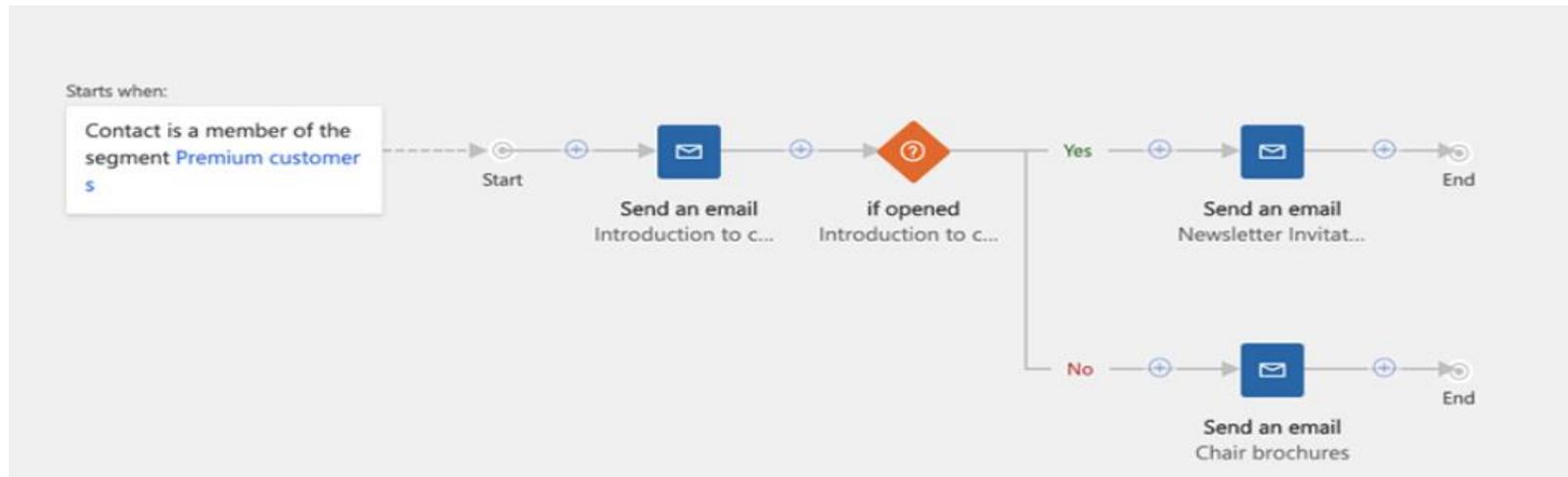
Campaign Automation Features

Key campaign-automation features include:

- ➢ A library of pre-designed and custom templates to instantly outline your basic strategy
- ➢ Visual drag-and-drop journey designer
- ➢ All marketing content available in one place, viewable, and editable by using embedded content designers
- ➢ Event-driven, extensible automation
- ➢ During and after execution, in-place insights are provided by the designer so you can see where contacts went and what they did there
- ➢ The ability to create custom channels in customer journeys to extend the marketing capabilities

MANAGING MARKETING EVENTS & WEBINARS

Live events and webinars are often a vital sales-and-marketing channel, but they can be complex to arrange, execute, and follow up on. The Dynamics 365 Marketing event management feature helps you every step of the way, from initial planning and budgeting, through promotion and publication, attendee registration, webinar broadcasting, final analytics, lead generation, and evaluation of ROI.

To create, view, and edit your events and all event-related records, go to the Events work area of Dynamics 365 Marketing, where you can create a new event and, working from this single event record, add most of the other types of records and information that you need to plan, publish, promote, and analyze it. Like many types of records in Dynamics 365, the event record provides a customizable business process workflow that guides users through each step of the process.
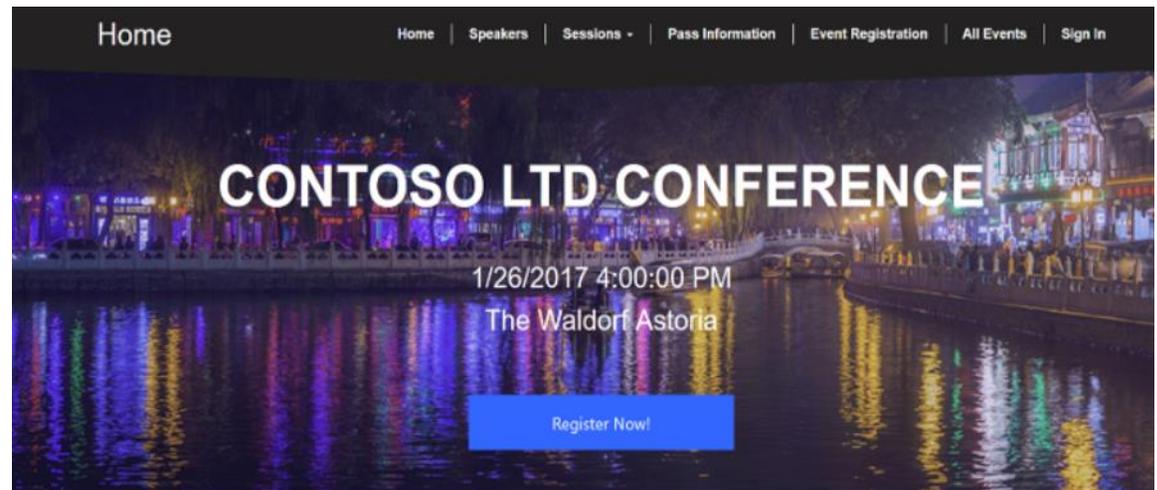
Event Management Features

Key event management features include:

- ➢ Seamless contact, registration, and attendance management features in one system
- ➢ The ability to create Microsoft Teams live events for webinars and Teams meetings for interactive online meetings
- ➢ Business processes that guide users through the essential steps of event planning
- ➢ Session, session-track, and speaker management
- ➢ Managing attendee passes to grant access to specific sessions or tracks
- ➢ Venue management for tracking buildings, rooms, and room layouts
- ➢ Guest logistics for registering hotels, room allocation, and reservations
- ➢ Tracking sponsors and their sponsorships for each event
- ➢ Reviewing the attendance history of each contact, including events and sessions attended
- ➢ Dynamics 365 Customer Voice survey integration
- ➢ Publishing a fully functioning event website with:
  - o Self-service attendee registration
  - o Important details about all published events, including event name, venue, passes, session schedule, and speakers
  - o All information drawn directly from your Dynamics 365 event planning records, with updates automatically reflected on the portal

GENERATE, SCORE, AND QUALIFY LEADS FOR SALES

As a marketer, your primary goals are to generate demand, identify sales prospects, and forward the best prospects as leads for salespeople to follow up with. Dynamics 365 marketing supports this process from discovery all the way to close.

Lead Management Features

Key lead-management features include:

➢ Generate leads across multiple channels
- o Create multichannel customer journeys to attract the best leads from LinkedIn, email, web landing pages, events, webinars, and more. Easily import marketing lists by using familiar tools such as Microsoft Excel.

➢ Lead nurturing
- o Apply insights and implement automated customer journeys to nurture leads by delivering highly relevant, perfectly timed messages and personalized experiences.

➢ Lead qualification
- o Use business process flows to guide each lead through the lead-generation demand waterfall model, from discovery, through nurturing, and on to qualification and close.

➢ Lead scoring

Set up flexible lead-scoring models based on:

- o Demographics and other information drawn from lead, contact, and account records and their multilevel relationships.
- o Regency, frequency, and monetary-value (RFM) rules based on automatically collected interaction data, including email clicks, websites visited, event registrations, and more.
- o Each rule can either add or subtract from the total lead score, depending on the nature of each interaction, and scores can be set to depreciate over time.

➢ Lead prioritization
- o Score each lead by using multiple scoring models.
- o Assign sales-readiness grades per scoring model.

➢ Analysis and insights

Evaluate the success of your marketing initiatives, and apply lessons learned to your future campaigns, by using rich analytic tools, including:

- o Demand-generation dashboards that measure conversion, volume, velocity, and more.
- o Charts and widgets that measure the effectiveness of lead scoring models by calculating metrics such as total leads scored over time, sales readiness distribution per model, and more.
- o Charts and widgets that measure the health and quality of each lead by using metrics such as lead age, lead interaction timeline, lead qualification progression, and more.

We are a subject matter expert in Dynamics 365 Marketing consulting having certified and experienced consultants which will create custom, robust, and scalable apps for different business needs in no time.

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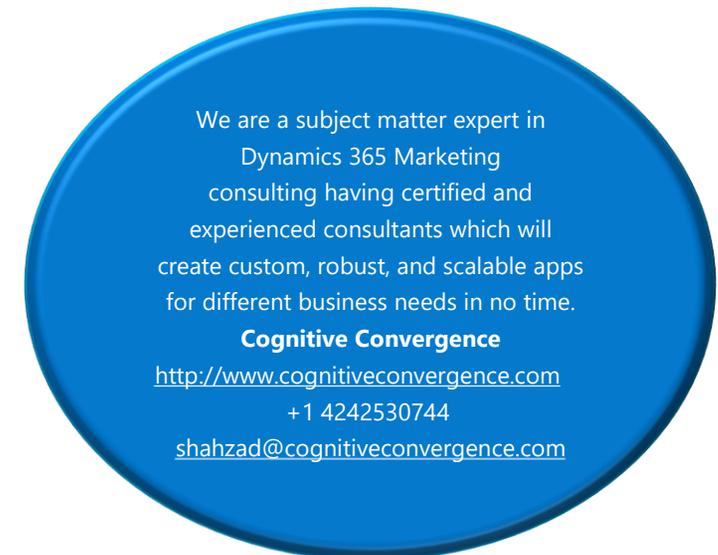
CONNECT WITH LINKEDIN

Bring your LinkedIn leads into Dynamics 365 for follow-up and nurturing.

Use the Microsoft Dynamics 365 Connector for LinkedIn Lead Gen Forms to automatically sync leads captured on LinkedIn with your Dynamics 365 organization so that your sales and marketing teams can develop and nurture them. Features include:

- ➤ Support for multiple LinkedIn member accounts
    - o If your organization includes multiple marketing managers, each running campaigns on their own LinkedIn account, you can configure Dynamics 365 to collect leads from all accounts simultaneously.
- ➤ Customizable lead creation and matching
    - o Configure how lead submissions captured on LinkedIn are associated with and updated on Dynamics 365.
- ➤ Analyze lead performance across sources
    - o Track and analyze the performance of leads captured on LinkedIn versus other sources.

DYNAMICS 365 MARKETING ENTITIES

There is much more out of the box functionality beyond these entities that companies can take advantage of, however these entities are the main pillars upon which the Marketing module lies.

Accounts

List down the Accounts as the companies or vendors that organization work with. This is the top-level record which can be used to track numerous pieces of valuable information for existing customers such as:

- Key information about the company itself, such as the given company's name, location, website and size
- Company hierarchies (Parent and sub-accounts)
- The individuals that work at the given company (Contacts)
- Recent Sales Opportunities
- Recent Service Cases
- Past and future activities related to the given company

Contacts

Organizations have the capability to track the individual people that they work with as well within Dynamics 365, these records are called contacts. Tracking Contacts in Dynamics 365 allows them to capture critical information on the individuals they work with in a centralized database accessible to everyone else in the company in real-time. Examples of information can be stored within the contact record includes:

- Details specific to the contact itself, including their: name, job title, phone number, email etc.
- The ability to track which company (account) they work for
- Information on when they were last contacted via a number of mediums such as phone calls, emails, faxes, etc.
- Sales opportunities they are the primary contact for
- Service cases they are the primary contact for

Marketing Lists

Provides a way to group your Contacts, Accounts, and Leads and interact with them via sending promotional emails, event details, newsletters and other updates relevant to the target customers. You can define the criteria to create your marketing lists (Example, contacts aged between 25 and 35).

Campaigns

Campaigns are designed to measure the effectiveness and accomplish a specific result, such as introducing a new product or increasing the market share and may include various communication channels such as email, newspaper ads, YouTube ads, etc.

Quick Campaigns

A Quick Campaign is similar to Campaign however it can be related to only one type of activity.

We ensure the best ROI of Dynamics 365 Marketing implementation by assisting you throughout the experience.

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DYNAMICS 365 MARKETING PRICING

Marketing	Price for organisations without any other Dynamics 365 app	Price for organisations with qualifying Dynamics 365 app
Marketing	From ₹ 99,145 Per tenant/month	From ₹ 49,570 [1] Per tenant/month
Customer Insights	From ₹ 99,155.30 Per tenant/month	
Forms Pro [3]	₹ 6,610 [4] Per 2,000 survey responses per tenant/month	

DYNAMICS 365 NO CODE SOLUTIONS

Dynamics 365 includes preconfigured entities, fields, forms, views, security models, reports, and workflows that help businesses manage their sales, marketing, and customer service needs. These out-of-the-box features are designed to provide functionality that is common to most sales, marketing, and service processes.

Microsoft Dynamics 365 includes many out-of-the-box tools to customize business logic into Dynamics 365, including the ability to build custom entities, fields, forms, views, security models, and workflow to inject specific business needs into Dynamics 365.

Common Data Service

The Common Data Model is a secure business database implemented by Microsoft as a service as the Common Data Service. The model holds typical business entities such as Accounts, Contacts, Opportunities, Products, etc. and those entities hold typical fields such as addresses, phone numbers etc. A business can then take this model and extend it as needed – add custom fields, create custom entities etc. The idea is that having a common data model as a service allows for out of the box integrations to many other products and services, such as PowerApps, Flow etc.

The Common Data Service was previously implemented as a database/schema service separated from Dynamics 365 but is now tightly coupled with Dynamics 365.

Model Driven Apps

Model-driven apps are built using the Dynamics 365 framework and can only connect to the Common Data Service as their data source. These applications are more suited to complex scenarios with multiple functions and utilize the Unified Interface UX.

While building a model-driven app, there is an advantage of the great features of the Dynamics 365 platform, which includes building entities, forms, business rules, business process flows, workflows, plugins, API, ALM, etc.

Also, if Dynamics 365 is used as an organization and open its instance in PowerApps, all D365 entities can be seen and take advantage of those to build apps:

Power Apps

Powered by Dynamics 365's Common Data Service for Apps, PowerApps allows organizations to create their own responsive business applications with the click of a button. Employee engagement surveys, cost estimators, budget trackers, to-do lists, booking apps; these can all be created for web and mobile without the need for coding knowledge or input from developers.

PowerApps' drag-and-drop interface enables anyone to build and launch richly functional, professional apps without writing a single line of code. The apps can be easily integrated with Office 365 and Dynamics 365 to gather and utilize business data and help engage customers.

Power Automate

A sister-service to PowerApps, Microsoft Flow-Power Automate uses the same Common Data Service for Apps to help users build automated workflows that take care of repetitive administrative tasks.

There are already thousands of ready-made **workflows** — digital sequences that trigger predefined actions when certain activities occur — for users to take advantage of, from creating CRM leads when someone tweets a particular word or phrase, or tracking Outlook emails in an Excel spreadsheet, to sending an email to a group when a data alert is triggered in analytics.

These workflows can be used to connect Microsoft services to third-party apps and programs, without the need for complex custom integrations.

Business Process Flows

A **Business Process Flow** in Microsoft Dynamics 365 is a tool which is meant to help guide users through a business process in the system. Business process flows are representations of business processes and are displayed visually in Dynamics 365 as a heading across the top of an entity form.

A business process flow is composed of Stages, and within each stage there are Steps to complete which are fields. In the business process flow heading, a user can see which stage they are at in the process, and which steps they need to complete before they proceed in the process.

Business process flows require users to complete certain steps before completing the process and if needed users can also be allowed to jump stages. They are available for out-of-the-box entities and even for custom entities. Additionally, an entity can have many business process flows associated with it. They are highly configurable to fit organizational needs.

Business Rules

Business rules are provided in a simple to use drag-and-drop interface which allows to quickly implement and easily change some of the most commonly used rules. The good thing with this is that a business rule runs in real-time so user will be able to see the action as soon as the condition has been met (unlike a workflow that will run on form save). Business rules can be applied on a Main Form or Quick Create Form. They will also work online, on Microsoft Dynamics 365 for Tablets and Dynamics 365 for Outlook.

Here are the actions can be taken by configuring a simple drag-and-drop Business Rule on a form:

- Set Field Value
- Clear Field Values
- Set Field Requirement Levels
- Validate Data & Show Error Messages
- Show Fields
- Hide Fields
- Enable Fields
- Disable Fields
- Create Business Recommendations
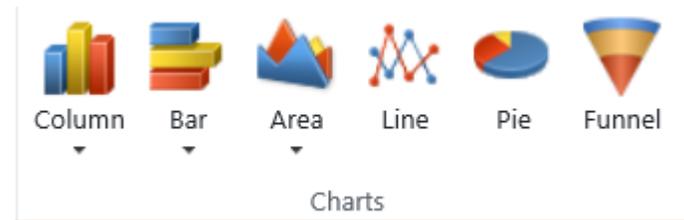
Charts and Dashboards

A chart is a graphic representation of data from multiple records of an entity. Charts are integrated with grids in the web application. They are built from the query on the data. When the query is updated for the data, the associated charts also get updated automatically.

Several different types of charts can be created within Microsoft Dynamics Marketing:

Charts are available for all views on CRM. There are 2 types of charts: system and personal.

- **System Charts**. System charts can only be created by users with the security roles of System Administrator or System Customizer. These charts are by default visible to all users. These charts can be customized by going on to the settings area and customizing the system.
- **User Charts.** Personal charts can only be seen by the users that create them or the ones to whom these charts are shared with. These charts can only be shared if the owner has sharing privileges.

Dashboards host vast set of information in forms of charts and tasks. Dashboards can be created and customized, and users can also create their own personal dashboards.

Out-of-the-box dashboards for Microsoft Dynamics Marketing CRM are as follows:

- Customer Service Operations
- Customer Service Performance
- Customer Service Representative
- Marketing
- Sales Activity
- Sales Performance

Real-time marketing and outbound marketing have a lot in common. Both can be used for marketing automation to send personalized emails.

Customizing Entities, Fields, Forms and Views

Entities are used to model and store business data in a Model-Driven Apps. Conceptually they are like tables in a relational database. The Common Data Model defines quite some build-in entities like contact, account, case… but almost always customizers will have to create new entities. Customizing entities includes adding fields to entities, changing the schema, and creating custom entities.
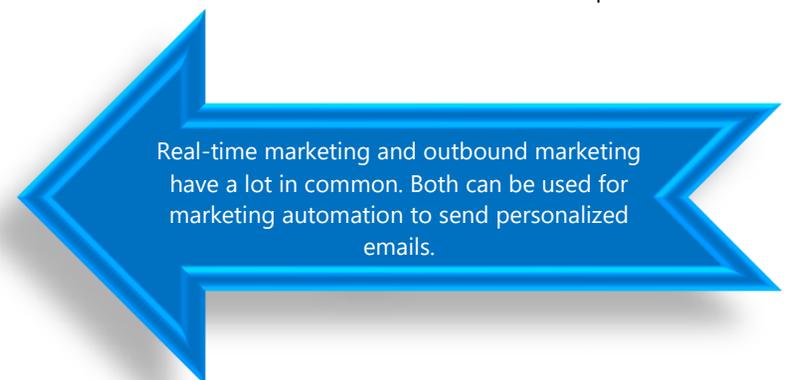
Fields are the equivalent of columns in the database table, just as an entity correlates to a table. Administrators have the ability to customize fields in a number of ways. They can define a field's name, data type, requirement level, search ability, security, and auditing. Remember: fields are specific to an entity, and a field created in one entity is not available in other entities. Fields are classified as either of the following:

- **System fields:** These are out-of-the-box fields that cannot be deleted but can be modified to some extent.
- **Custom fields:** These are fields that are built within the system and can be modified and deleted.

Forms can be modified to show only those fields that are necessary for business processes. There are several types of forms available: **Main, Main – Interactive, Mobile, Card, Quick Create, and Quick View**. The Main, Main – Interactive, Card, Quick Create, and Quick View forms are available in the web application, Dynamics 365 for Outlook, and Dynamics 365 for tablets. The Mobile form is used for Dynamics 365 for phones.

Views are grids with records listed under select column headings. It is a type of saved query. Users can select different views to look at a subset of records of the same entity that fit into pre-specified filter conditions. There are three main types of views: public, system, and personal.

- **Public Views**

    These are the views that come with the application. Custom views that an organization creates are also public views. One of these public views can be defined as a default view. When a user selects an entity by clicking on it in the navigation pane, the default view is what gets displayed.

- **System Views**

    These views, similar to Public views, are automatically created by CRM on installation. They are used for unique situations within the application. System Views include Associated View, Advanced Find View, Lookup View, and Quick Find View

- **Personal Views**

    Users can create their own views using the Advanced Find tool and save them as personal views.
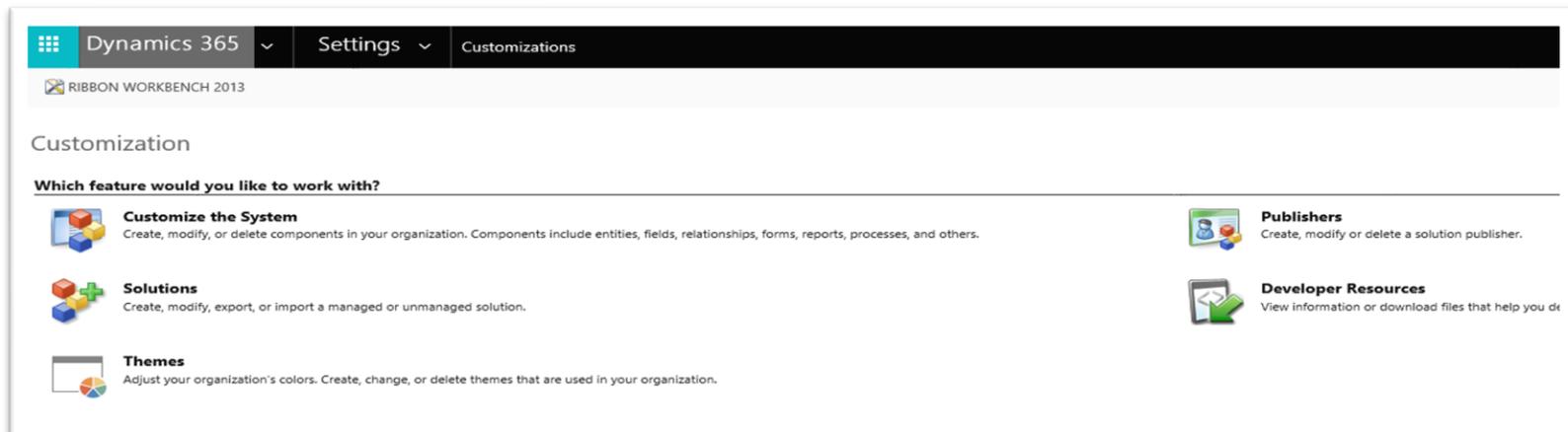
All these customizations can be made through Dynamics 365 Settings > Customizations > Customize the System:

DYNAMICS 365 DEVELOPMENT SOLUTIONS

Web API

The Dynamics 365 Web API provides a development experience that can be used across a wide variety of programming languages, platforms, and devices to access Dynamics 365. The Web API implements the OData (Open Data Protocol), an OASIS standard for building and consuming RESTful APIs over rich data sources. Because the Web API is built on open standards, no assemblies are required for a specific developer experience. HTTP requests can compose for specific operations or use third-party libraries to generate classes. It uses **JSON** in the body of the HTTP requests and response.

Using Web API following CRUD operations, Actions and Functions can be executed:

- **Basic Operations** (Create, Update, Delete)
- **Retrieve Operations** (Retrieve, Retrieve Multiple, Change Tracking)
- **Batch Operations**
- **Functions** (Bound/unbound functions with/without parameters)
- **Actions** (Bound/unbound actions with/without parameters)
- **Metadata** (Retrieve entity/attribute metadata)

SOAP Web Service

The Organization service, also sometimes known as the "SOAP endpoint," has been available since Microsoft Dynamics CRM 2011. The HTTP requests and responses are sent using **XML**, which must conform to specific schema and namespaces. The Organization service is optimized for use with **.NET**. The Microsoft Dynamics 365 SDK provides a set of assemblies and tools which allow to generate strongly typed classes and proxies that streamline the development process and enjoy a better development experience using Microsoft Visual Studio.

Business logic that runs in plug-ins or workflow assemblies on the server expect to use the Organization service. Input and output parameters use specific classes defined with the assemblies that support the Organization service.

- Create personalized emails
- Build Nurture Campaigns
- Multi-Channel Campaigns
- Landing Pages and Forms
- Event Management
- Customer Voice surveys

FetchXML

FetchXML is a proprietary **query language** that is used in Common Data Service. It's based on a schema that describes the capabilities of the language. The FetchXML language supports similar query capabilities as query expressions.

In Dynamics 365 WebAPI, data can be retrieved using OData queries, but if there is some complex requirement, it's better to query using fetchXML. FetchXML have two main advantages - it can be easily generated using Advanced Find, and it is more readable. Even Joins and Aggregate functions can be used in fetchXML queries.
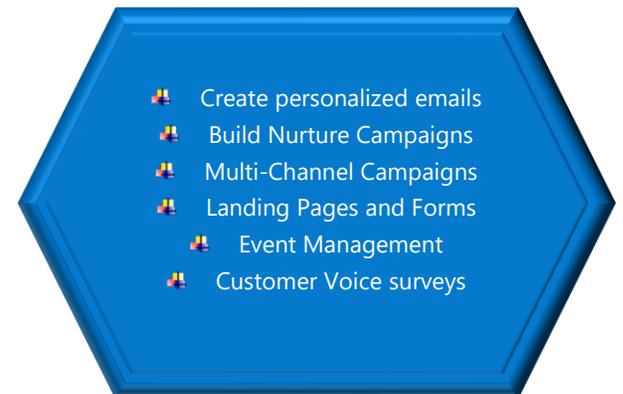
Web Resources

Web resources represent files that can be used to extend the Microsoft Dynamics 365 web application such as html files, JavaScript, and Silverlight applications. Organizations can use web resources in form customizations, the SiteMap, or the application ribbon because they can be referenced by using URL syntax.

Web resources are stored as records in the database, they can be managed programmatically by using the standard techniques to create, retrieve, and update records. Text-based web resources (JScript, CSS, XML, XSL, and HTML) can be edited and saved in the application.

Client-Side JavaScript programming

The use of JavaScript in Dynamics CRM allows to manipulate CRM forms and data in real time using lightweight and easy to use syntax. Because JavaScript is commonly used in web development, it has been heavily extended with methods that allow developers virtually limitless possibilities. This does not, however, mean that all tools available should be applied to Dynamics CRM environments.

Microsoft Dynamics CRM uses the XRM Page Hierarchy JavaScript model as displayed.
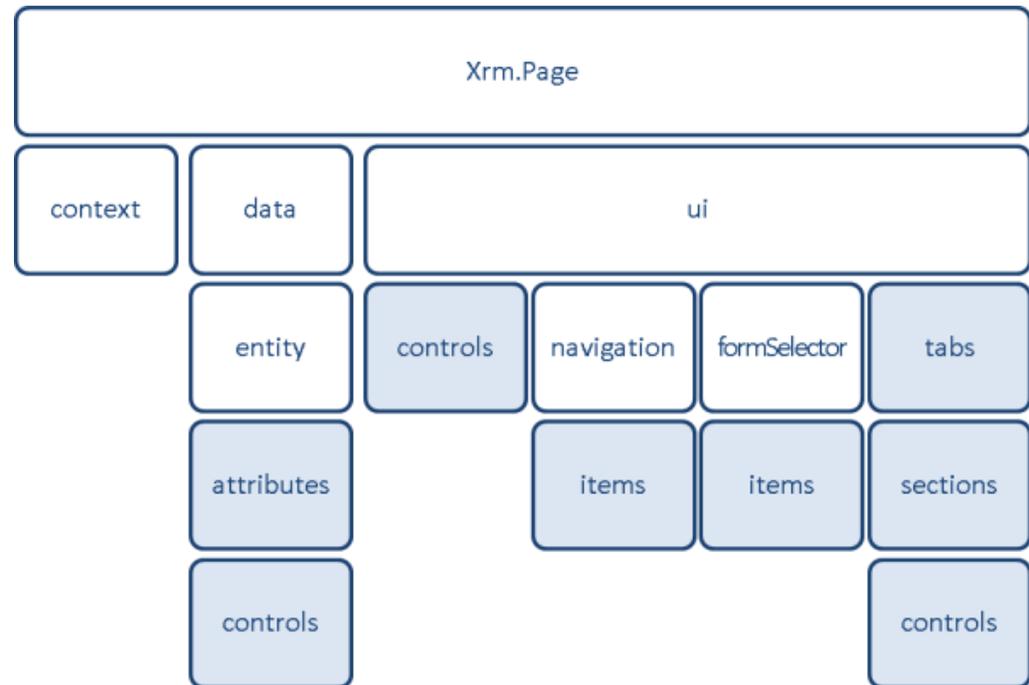
The Xrm.Page object serves as a namespace object to consolidate three objects on the form:

Xrm.Page.context: Xrm.Page.context provides methods to retrieve information specific to an organization, a user, or parameters that were passed to the form in a query string.

Xrm.Page.data.entity: Xrm.Page.data provides an entity object that provides collections and methods to manage data within the entity form.

Xrm.Page.ui: Xrm.Page.ui provides collections and methods to manage the user interface of the form.

Plug-ins

A plug-in is a custom business logic that integrates with Microsoft Dynamics CRM to modify or extend the standard behavior of the platform. Plug-ins act as event handlers and are registered to execute on a particular event in CRM. Plugins are written in either C# or VB and can run either in synchronous or asynchronous mode.

Some scenarios where plugins can help are:

- Execute some business logic such as updating certain fields of a record or updating related records, etc. when a specific record is created or updated.
- Call an external web service on certain events such as saving or updating a record.
- Dynamically calculate the field values when any record is opened.
- Automate processes such as sending e-mails to customers on certain events in CRM.
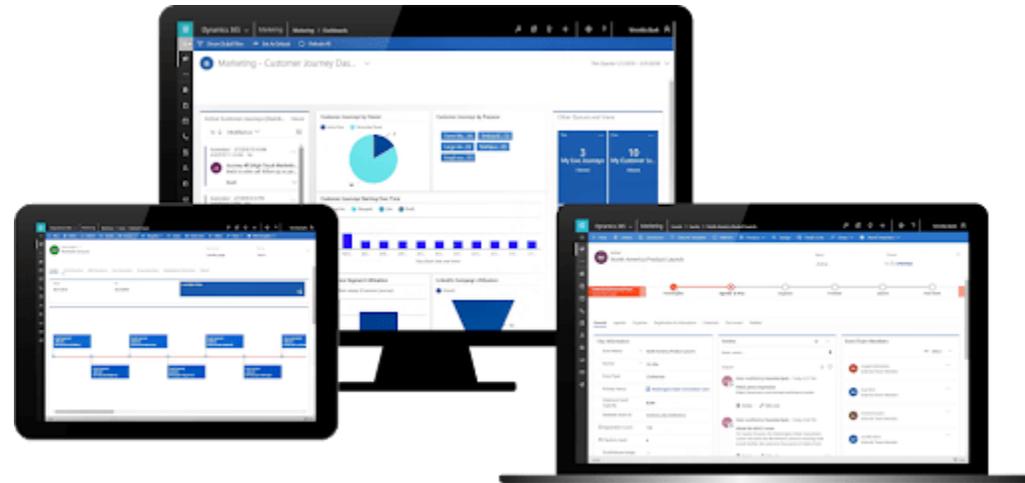
CHALLENGES

Like most digital transformations, implementing Microsoft Dynamics 365 has challenges that need to be overcome. Here are a few of the challenges to keep in mind when embarking on Microsoft Dynamics 365 transformation:

5. Privacy
It can be a bit difficult to believe but there are still companies that prefer on-premise CRM than cloud-based ones. They want full control of their data and privacy. Unfortunately, the latest version of Dynamics CRM—Dynamics 365—is a cloud-only (SaaS) CRM. Even if Microsoft is a trustworthy company, some companies are still not embracing cloud technology fully.

1. Flexibility
Microsoft Dynamics 365 is one of the more flexible ERP systems in the digital transformation space. This is mostly a good thing, but it can also create unique problems during implementation. Flexibility leads to more decisions and potential analysis paralysis, so it is important for business process management activities to drive the design of software.

3. Cloud Infrastructure
Microsoft Dynamics 365 is a pure cloud solution. Though cloud ERP is gaining market share and adoption at the expense of on-premise solutions, it isn't for everyone. Some multi-national organizations with operations in developing countries with unreliable infrastructures, for example, are simply not able to realistically adopt cloud solutions across the entire company.

4. Data storage capacity
Data and file storage limit issues are common especially to those who use Dynamics 365 online. To compensate, Microsoft made add-on storage capacity available. However, small and mid-size businesses don't prefer this kind of additional expenses.

2. A little expensive
Dynamics 365 is considered a bit heavy on the pocket. Especially when it comes to adding extra portal sites either for QA, development or even for user acceptance testing, there is a heavy cost involved. Also, there is a repeated monthly cost which is tough to bare especially by the small enterprises.

CONCLUSION

Dynamics 365 for Marketing features a lot of intensive tools, and in-depth tracking of customer journeys, making it far more powerful — and complex — than many entry-level cloud marketing platforms. For this reason, it probably isn't best suited to the narrow end of the SMB spectrum, as it's unlikely that small businesses will have the need, or the resources, to fully utilize the extent of Marketing's capabilities.

For mid-sized organizations that are willing to invest a little more time and money into their marketing strategies, Dynamics 365 for Marketing is a great toolkit, especially for those that've outgrown the basic, native marketing functionality of other Dynamics 365 apps such as Sales. Though the app caters for both B2B and B2C marketing, it's generally more suited to business-to-business marketing.

Cognitive Convergence is currently helping a handful of clients implement Dynamics 365, so we can attest that it is a strong product when used in the right situations. The easiest way to mitigate these risks is to hire an independent, technology-agnostic digital transformation consulting firm such as Cognitive Convergence to help validate your software decision, prepare for implementation readiness, help manage your organizational change program, and provide quality assurance over your system integrator.

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