

A True Integration between Typeform & Microsoft Dynamics 365 Sales



USER GUIDE

SCALEABLE FORMS - FOR MICROSOFT DYNAMICS 365 SALES

BY



DISCLAIMER

This document is presented with explicit understanding that all contents of this document are confidential and shall not be divulged to any third party without prior written consent of Scaleable Solutions Pvt. Ltd.

All services are provided according to our terms and conditions.

SCALEABLE FORMS

*Scaleable Solutions offering integration between Typeform and
Microsoft Dynamics 365 Sales*

Scaleable Forms is a robust add-on, offered for first time for Microsoft Dynamics Sales.

Typeform is a great tool to Engage your audience by conversational forms & surveys, Typeform allows you to create dynamic forms and surveys based on their needs. These forms can be used for generating contact, account, lead, survey, questionnaire, registration, invoice or can be used for any other specific business need.

Scaleable Forms helps you to get back your responses, of contact, account, lead or any other form entities back to Microsoft Dynamics 365 Sales.

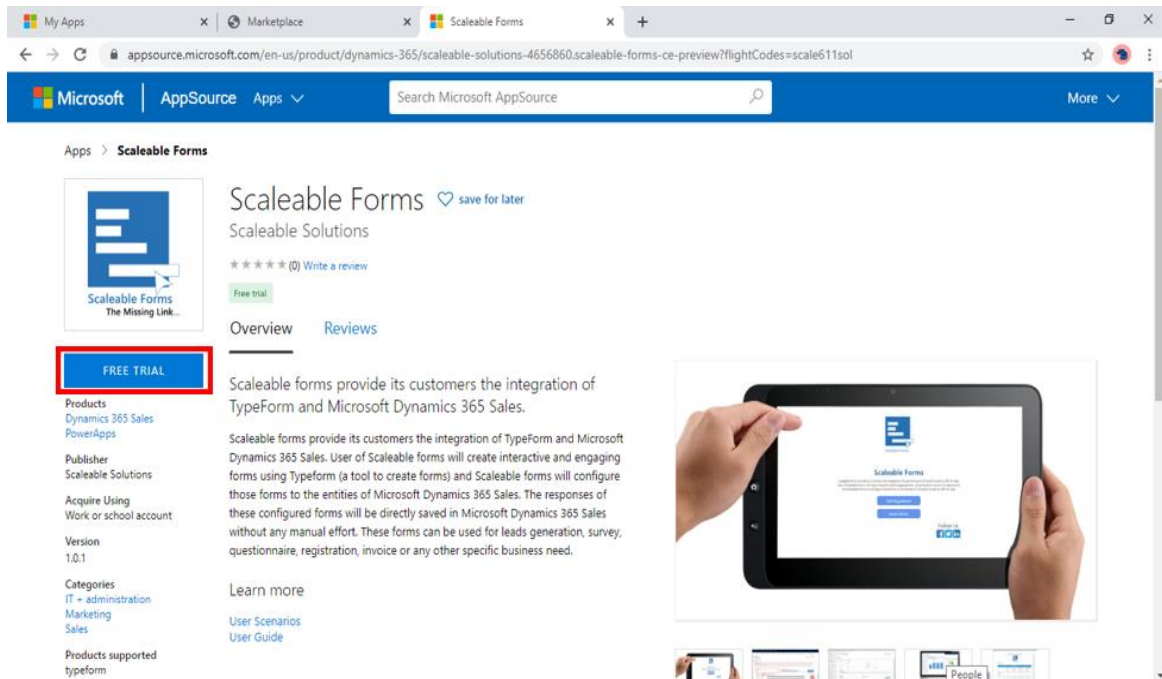
Table of Contents

How to get started	4
Install Solution in Microsoft Dynamic 365:	4
Registration:	6
Setup:	6
Payment:	7
Configuration:	8
How to get Typeform PAT:	9
Assign Role:	10
How it works	12
Creating forms in Typeform:	12
Creating New Configuration:	13
Sync Duration:	13
Previous Sync:	13
Saved Unmapped Fields:	13
End Date:	13
Mapping with CRM Fields:	13
View Responses	14
View Typeform Fields:	17
Other Form Configurations:	17
View Other Form Responses:	18
Configuration Error:	20
Dashboard:	21
Unsubscribe and Uninstalling the Solution:	21

How to get started

Install Solution in Microsoft Dynamic 365:

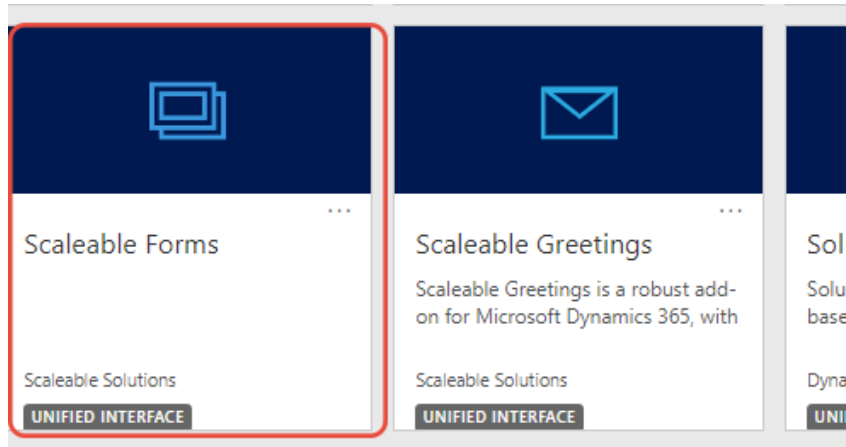
Download the application from [App Source](#). Click on “Free Trial”



Enter your **Organization** > **Check Terms and Conditions** > **Click Agree**

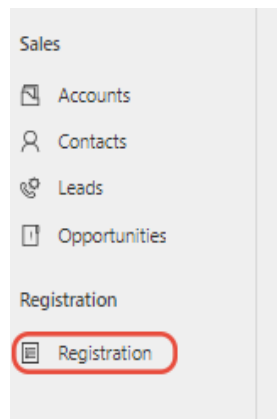
Check the status of the solution.

The application will be downloaded in Sales and will be shown as below. Click the Solution.



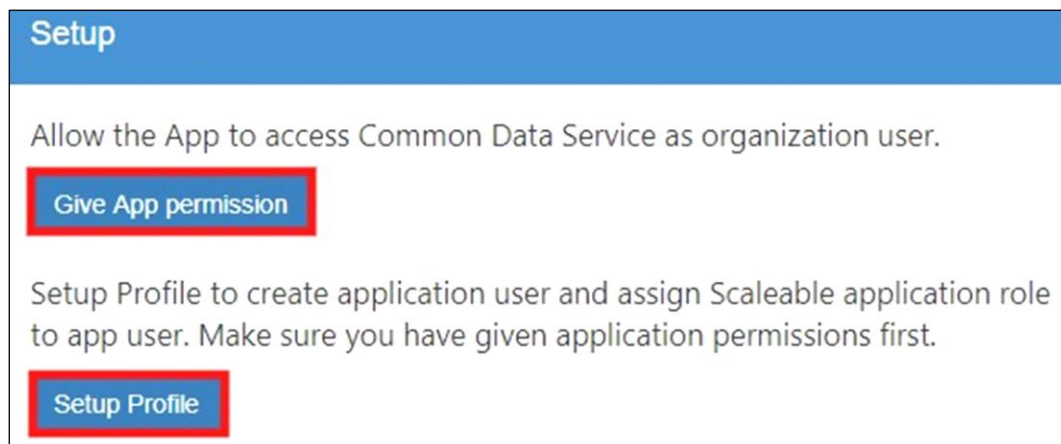
Registration:

From site map, click on Registration to get yourself registered.





Setup:

Give app permissions to allow Scaleable Forms to access the Common Data Service as an organization user and then Setup Profile.



On Registration form, fill out the **General information**. Select your **Subscription Plan or Trial**. Check **Terms and Conditions** and then hit **Submit Button**.



Registration

Configuration

General Information

First Name *

Jane

Last Name *

Snow

Company *

Scaleable Solutions

Phone *

+20177363723

Email *

jane@scaleablesolutions.com

Alternative Email

Alternative Email

Country *

United Kingdom (UK)

State/Province *

England

City *

London

Postal Code *

12345

Address1 *

House 11

Address2

Address

Subscription Plan

☐ 1 Month **Free** Trial

☐ Subscribe For £ /user/month

☒ agree with Terms and Conditions

Submit

Payment:

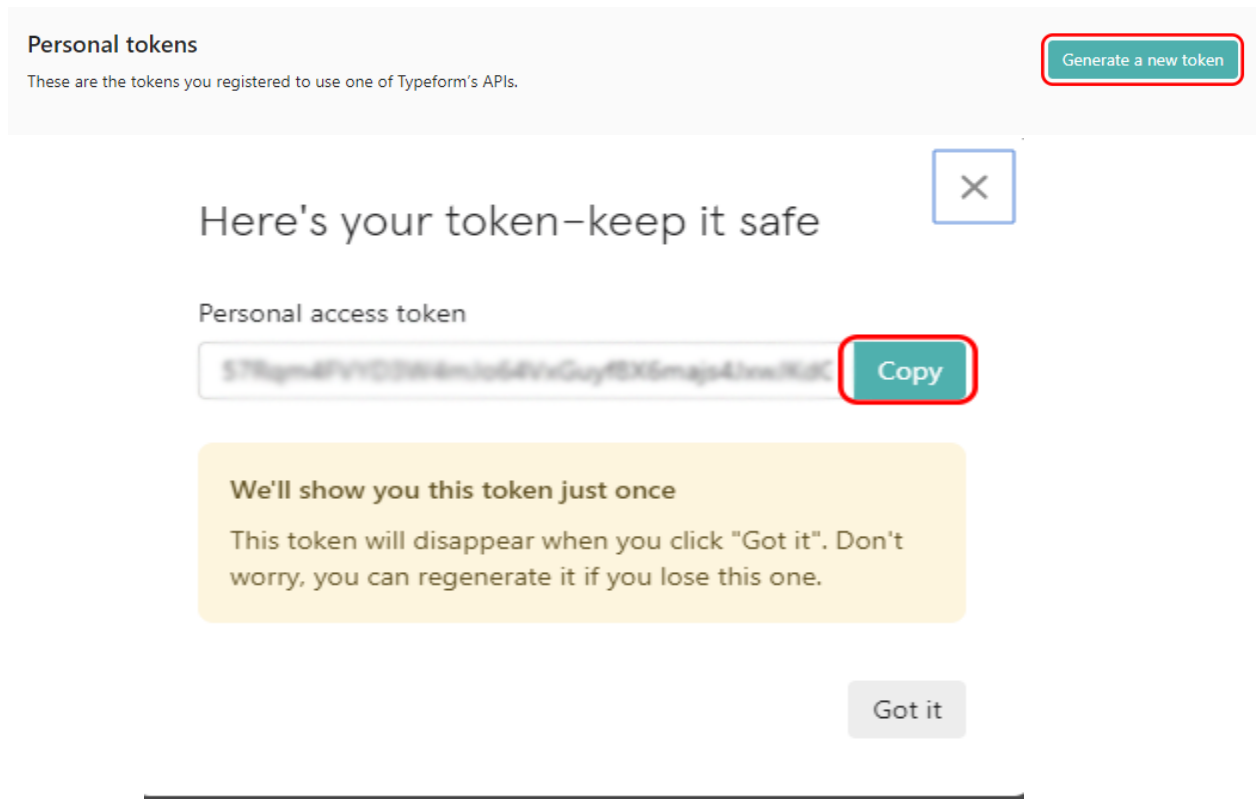
If you have selected to Subscribe, you'll be able to make payments via Stripe.

Note: Price is per user per month. The enabled users will be counted automatically.
Enter your payment details and click **Pay**.

How to get Typeform PAT:

Login to your Typeform account. If you don't have an existing account, click on the link to create one <https://admin.typeform.com/signup>

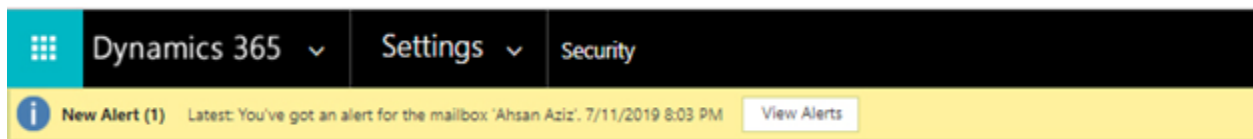
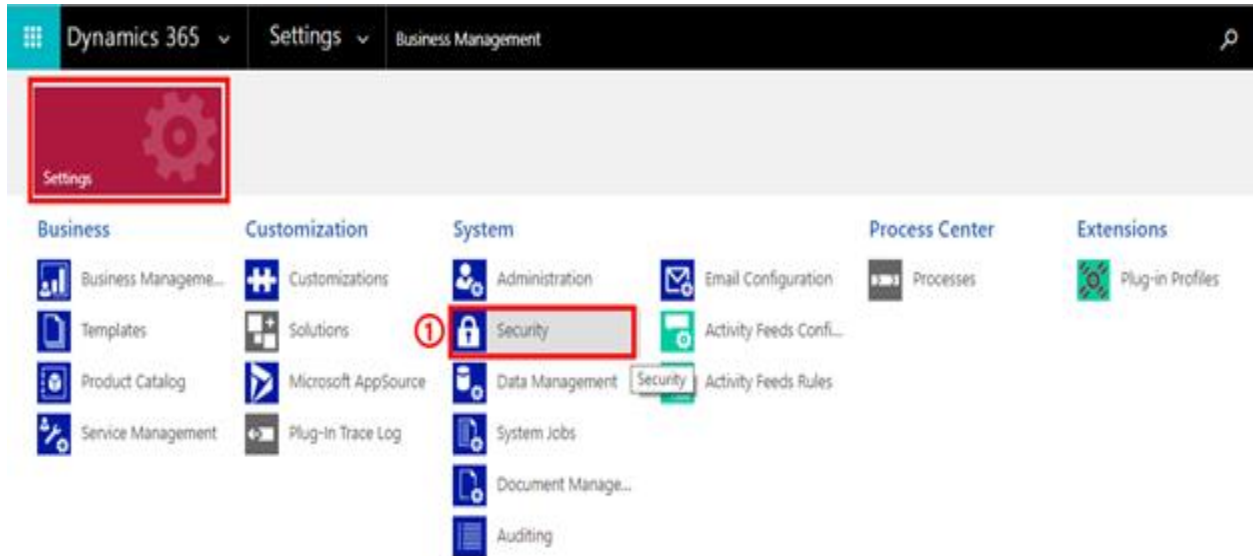
After Logging in to your account Go to **Settings > Profile > Personal Token > Generate New Token**



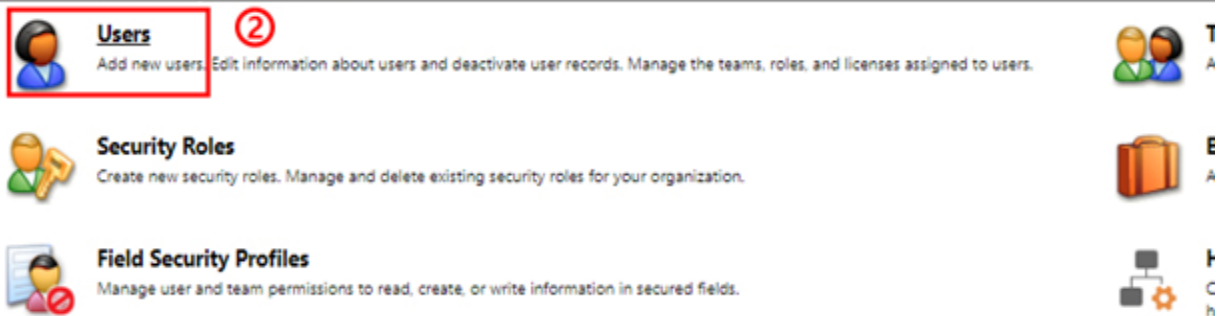
Note: In case you have lost your PAT, you can always generate new token from your Typeform account and update it.

Assign Role:

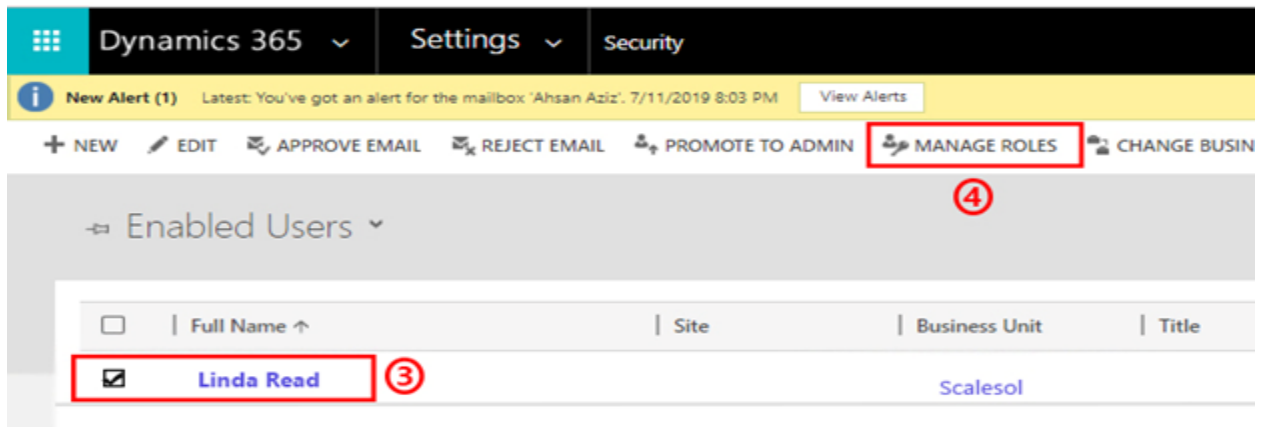
To assign roles to the users go to **Settings > Security > Users**



Which feature would you like to work with?



Select the user to assign role and click **Mange Role**



Assign role to the user



There are three type of roles here

- User with **“Scaleable forms Admin”** role will have all permissions of Scaleable Forms entities and can also create Contacts, Accounts, Leads and Opportunities.
- User with **“Scaleable forms Read”** role will only be allowed to read entities of Scaleable form, contacts, Accounts, Leads and Opportunities.
- **“Scaleable forms Service”** role should be assigned to the user for the connections and configurations. This role will be automatically assigned to the App User when you setup the profile.

How it works

Creating forms in Typeform:

Create any type of form as per your requirements in Typeform. How to create a form [click here](#).

As an example, we have created Contact Form below

The screenshot displays a Typeform interface for a form titled "Contact Form (copy)". The form consists of five sequential questions:

- Question 1:** "Got questions? Want to tell us something? Looking for advice?" with a text input field. Below the input field, there is a list of suggestions: "I want to know more about you", "I have some feedback for you", "I'm looking for some advice", and "I'd just like to chat".
- Question 2:** "Great. What would you like to ask or tell us?" with a text input field.
- Question 3:** "Thanks. Now let's grab your contact details so we can get back to you. First off, what's your name?" with a text input field.
- Question 4:** "Your Contact Number?" with a text input field.
- Question 5:** "And finally, could you let me know your email address, [Thanks. Now let's grab... x]?" with a text input field. Below the input field, there is a message: "We'll be in touch within the next couple of days with an answer for you."

The form is displayed in a mobile app-like interface with a sidebar on the left containing various icons (pencil, drop, share, list, bell, gear, lock) and a bottom bar with a question mark icon and a "Add new question" button. The top bar shows the form title "Contact Form (copy)" and two buttons: "CREATE" and "CONNECT".

Note: If you have already created some forms previously in Typeform then you only need to create new configurations for them.

Creating New Configuration:

After Creating form, you have to configure it once in Scaleable Forms

Click on **Forms Configurations**> Click **+New**. Fill all the required fields.

The screenshot shows the 'New Forms Configuration' interface. On the left sidebar, 'Forms Configurations' is highlighted with a red circle (1). At the top, the '+ New' button is circled in red (2). Below the title bar, the 'General' tab is selected and circled in red (3). At the top left of the main content area, the 'Save' button is circled in red (4). The configuration form contains the following fields:

Configuration Name *	contact Form		
Entity *	Contact	Sync Duration *	1 Hour
Previous Sync	On	Save Unmapped Fields	Yes
Start Date	12/1/2019	End Date *	1/31/2020
Select Type Form *			
Contact Form (copy)			

Sync Duration:

Sync duration of every configuration can be specified. Synchronization will take place after 1,3 or 6 hrs., in accordance with the choice of you.

Previous Sync:

If you want to fetch previous responses of forms which are already stored in Typeform before you choose Scaleable forms. All those responses can be fetched by setting “Previous Sync” button as **“ON”** and specify **Start Date**

Saved Unmapped Fields:

If you want to save Unmapped fields set this Button as **“ON”**

End Date:

You have to select the end date for each configuration. You will no longer receive the responses for the configuration after the selected end date.

Mapping with CRM Fields:

After completing your configuration, you have to map the Typeform Questions with CRM Fields. That where you want to save Typeform questions in D-365.

You can also add filter for look up fields e.g. Company Name; The contact you have created is related to the Account that already exists. So, it will first search for the related Account and map the account otherwise it will be saved as Typeform field (unmapped fields).

Below is the example showing mapping which is filtered by **“Account Name”**

Click on **“save”** on top left of the screen.

Note: In this version we are not mapping attachments and pictures.

View Responses

Click on the created configuration. For example, **“Contact Form”**

Name	Created On	Entity	Mapping Expiry	Previous Sync	Save Extra Fields	Start Date
contact Form	1/7/2020 4:56 PM	Contact	1/31/2020	On	Yes	12/1/2019
name	1/7/2020 11:26 AM	Contact	1/31/2020	On	Yes	1/1/2020
other	1/6/2020 3:42 PM	Other	1/17/2020	On	Yes	11/1/2019
other with last	1/7/2020 10:41 AM	Other	1/22/2020	On	Yes	1/20/2017

Note: Wait as per the specified sync duration time to Get back responses.

Click on **Related**> Click on **Contacts**

contact Form
Forms Configuration

Active Status: Faiza Siddiqui (Owner)

General **Related** (3)

Related - Common

- Audit History
- Accounts
- Contacts** (4)
- Configuration Errors
- Leads
- Opportunities
- Other forms Responses

Config Entity: Sync Duration * 1 Hour

Previous: Save Unmapped Fields: Yes

Start Date: End Date * 1/31/2020

Click on any contact.

The screenshot shows the 'contact Form' configuration page. The left sidebar contains navigation links: Home, Recent, Pinned, Scaleable Forms, Dashboards, Forms Configurations, Configuration Errors, Sales, Accounts, and Contacts. The main content area has a top bar with actions like New, Deactivate, Delete, Refresh, Assign, Share, Email a Link, Flow, Word templates, and Run Report. Below this is a 'contact Form' header with 'Forms Configuration' and tabs for General, Contacts, and Related. A search bar is present. The 'Contact Associated View' table lists contacts with columns for Full Name, Business Phone, Email, and Created On. The first row, 'Jane', is highlighted with a red box.

Full Name	Business Phone	Email	Created On
Jane	---	jane@scaleablesolutions.com	1/7/2020 5:01 PM
Nick	---	nick@yahoo.com	1/7/2020 5:01 PM
Susen	---	susen@gmail.com	1/7/2020 5:01 PM

You will see the details of the Contact.

The screenshot shows the 'Jane Contact' details page. The left sidebar is the same as the previous screenshot. The main content area has a top bar with actions like New, Deactivate, Connect, and Add to Market. Below this is a 'Jane Contact' header with tabs for Summary, Details, Files, Type Form Fields, and Related. The 'Type Form Fields' tab is highlighted with a red box. The 'CONTACT INFORMATION' section lists fields like First Name, Last Name, Job Title, Account Name, Email, Business Phone, Mobile Phone, Fax, Preferred Method of Contact, Address 1: Street 1, and Address 1: Street 2. The 'Active' status is shown at the bottom.

Field	Value
First Name	Jane
Last Name	---
Job Title	---
Account Name	---
Email	jane@scaleablesolutions.com
Business Phone	---
Mobile Phone	+4316541265136
Fax	---
Preferred Method of Contact	Any
Address 1: Street 1	---
Address 1: Street 2	---

Now click on “**Type Form Fields**” to view the unmapped fields.

View Typeform Fields:

Fields which you saved as **unmapped fields** while creating the **Contact Form Configuration** will be saved in **“Type Form Fields”** against the contact created.

The screenshot shows the 'Type Form Fields' view for a contact named Jane. The interface includes a sidebar with navigation options like Home, Recent, Pinned, and Scaleable Forms. The main content area displays a table with two columns: 'Questions' and 'Answers'. The questions listed are 'Thanks for reaching out. What's your message about?' and 'Great. What would you like to ask or tell us?'. The corresponding answers are 'I want to know more about you' and 'about your services'.

Other Form Configurations:

Click on **Form Configuration** > Click on **+New** then Fill the required fields. You will select Entity as **“Other”** for other form configurations.

The screenshot shows the 'New Forms Configuration' form. The 'General' tab is selected. The form contains the following fields and values:

Field	Value
Configuration Name *	EE Survey
Entity *	Other
Sync Duration *	1 Hour
Previous Sync	On
Save Unmapped Fields	Yes
Start Date	12/1/2019
End Date *	1/31/2020

Note: “Save unmapped fields” will be automatically locked as “Yes”

Select the form you want to configure. Here as example we have selected **“Employee Engagement Survey”**. Select CRM Fields to add filter. You can filter them by email, Last name, contact number or any other field.

Scaleable Forms Scaleable Forms > Forms Configurations > EE Survey

EE Survey
Forms Configuration

Active Status Faiza Siddiqui Owner

General Related

Select Type Form *
Employee Engagement Survey (copy)

CRM Fields
Name

TypeForm Questions
Would you mind telling us your First Name?

Add Mapping

CRM Fields	Filtered By	TypeForm Questions	Actions
Contact	Email	Done! If you want to leave us your email so we can reach out to discuss your suggestions, feel free to do that here:	Delete
Account	Email	Done! If you want to leave us your email so we can reach out to discuss your suggestions, feel free to do that here:	Delete
Lead	Email	Done! If you want to leave us your email so we can reach out to discuss your suggestions, feel free to do that here:	Delete

Click on **“Save”** to save the configuration.

View Other Form Responses:

To view other form responses, click on

Form Configurations > EE Survey > Related > Other Form Responses

Dynamics 365 Scaleable Forms Scaleable Forms > Forms Configurations > EE Survey

EE Survey
Forms Configuration

General Related

Related - Common

- Audit History
- Accounts
- Contacts
- Configuration Errors
- Leads
- Opportunities
- Other forms Responses

CRM Fields
Select any field..

TypeForm Questions

Select any contact to view Details

As we have filtered the mapping by email address so, other form response is saved against the Contact with matched email address.

Scaleable Forms

Scaleable Forms > Forms Configurations > EE Survey

New

Deactivate

Delete

Refresh

Assign

Share

Email a Link

Flow

Word Templates

Run Report

EE Survey

Forms Configuration

Active Status

Muhammad Bilal

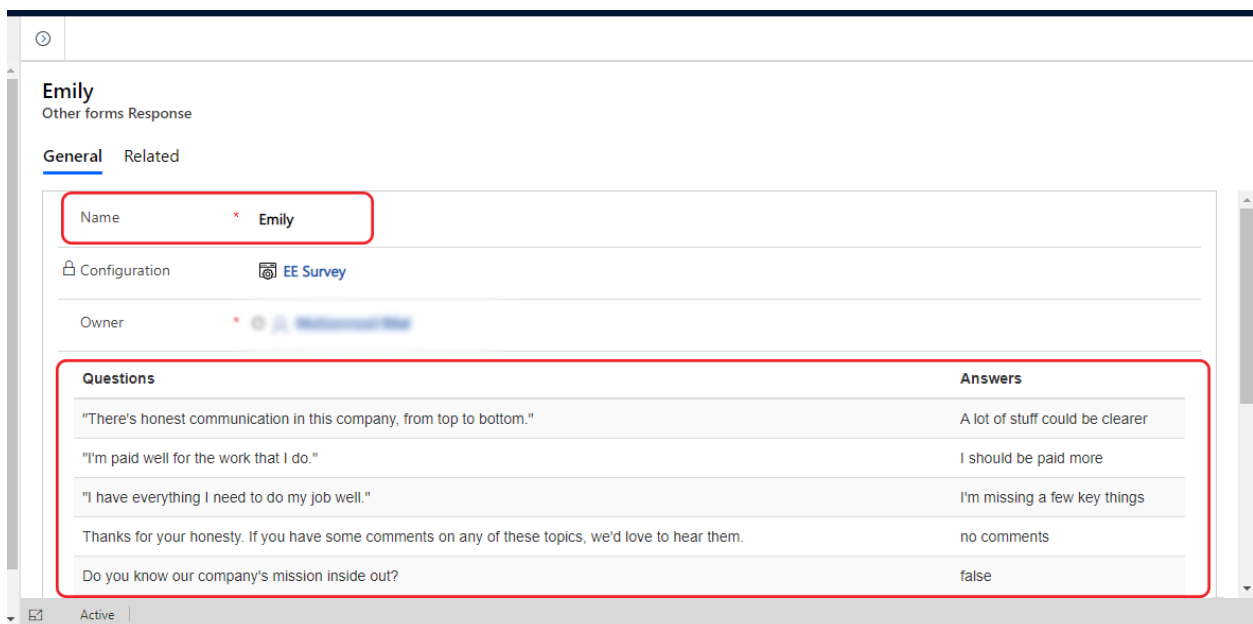
General

Other forms Responses

Related

Arsalan	10/01/2020 1:02 ...	---	Arsalan Qureshi	---	<input type="radio"/> Muhammad Bi EE Survey
Danyal	10/01/2020 1:02 ...	---	Daniyal Rasheed	---	<input type="radio"/> Muhammad Bi EE Survey
Emily	10/01/2020 1:02 ...	---	Emily Gold	---	<input type="radio"/> Muhammad Bi EE Survey
Faiza	10/01/2020 1:02 ...	---	Faiza Siddiqui	---	<input type="radio"/> Muhammad Bi EE Survey
Khubaib	10/01/2020 1:02 ...	---	Khubaib Latif	---	<input type="radio"/> Muhammad Bi EE Survey
M Bilal	10/01/2020 1:02 ...	---	M Bilal	---	<input type="radio"/> Muhammad Bi EE Survey
M hamid	10/01/2020 1:02 ...	---	M Hamid Iqbal	---	<input type="radio"/> Muhammad Bi EE Survey
Mehreen	10/01/2020 1:02 ...	---	Mehreen Habib	---	<input type="radio"/> Muhammad Bi EE Survey
Nadeem	10/01/2020 1:02 ...	---	Nadeem Hassan	---	<input type="radio"/> Muhammad Bi EE Survey
Nishat	10/01/2020 1:02 ...	---	Nishat Rana	---	<input type="radio"/> Muhammad Bi EE Survey

Open a response to view details



Emily

Other forms Response

General Related

Name * Emily

Configuration EE Survey

Owner * Muhammad Bilal

Questions	Answers
"There's honest communication in this company, from top to bottom."	A lot of stuff could be clearer
"I'm paid well for the work that I do."	I should be paid more
"I have everything I need to do my job well."	I'm missing a few key things
Thanks for your honesty. If you have some comments on any of these topics, we'd love to hear them.	no comments
Do you know our company's mission inside out?	false

Configuration Error:

Errors occur when data in forms has been entered wrong. To view the configurations having errors click **“Configurations Error”**. Here list of configurations having errors will be displayed.

Click on any configuration to view the errors in its responses.

Dynamics 365 > Scaleable Forms > Scaleable Forms > Configuration Errors

Active Form Errors

Name	Created On	Modified On	Form Configuration
EB Survey 1	10/01/2020 12:21 PM	10/01/2020 12:50 PM	test

Dynamics 365 > Scaleable Forms > Scaleable Forms > Configuration Errors > EB Survey 1

EB Survey 1
Configuration Error

General Related

Name: EB Survey 1

Owner: Muhammad Bilal

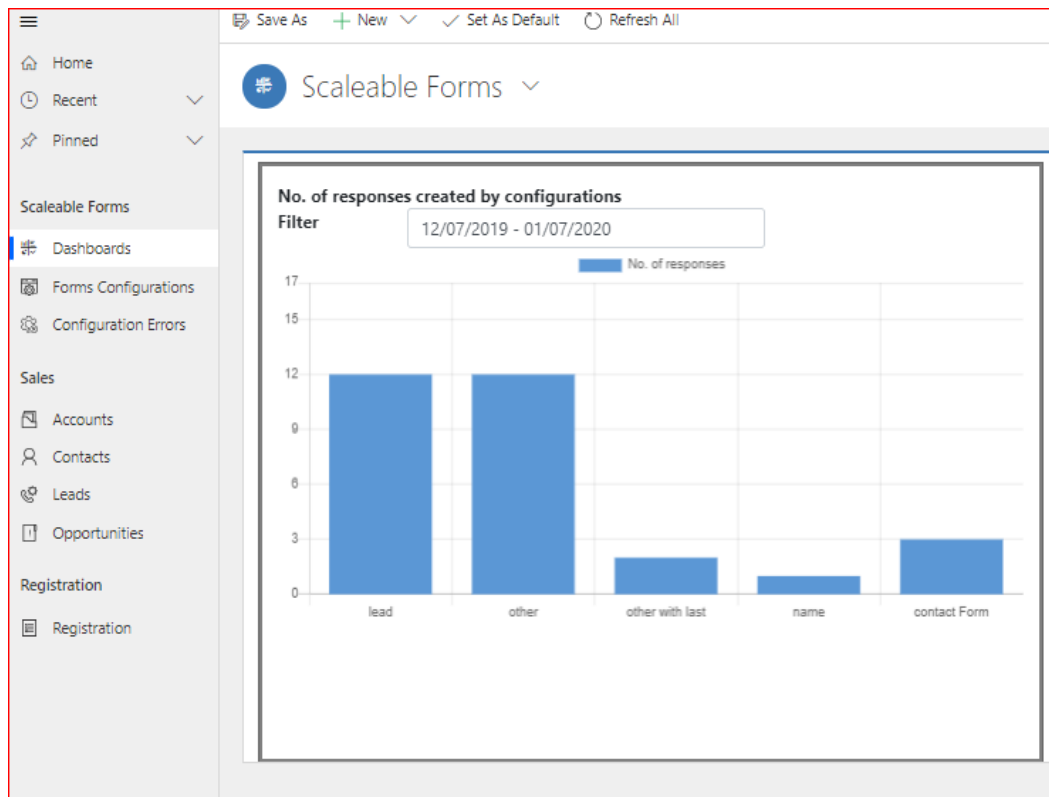
Form Configuration: test

Error Logs

Name	Created On	Error Description	Form Error	Owner
EB Survey 1.1	10/01/2020 12:21 PM	A validation error ...	EB Survey 1	Muhammad Bilal
EB Survey 1.2	10/01/2020 12:21 PM	A validation error occurred. The length of the 'firstname' attribute of the 'contact' entity exceeded the maximum allowed length of 50.		

Dashboard:

No. of Records Created by Configurations will display the total number of records created by each configuration.



Unsubscribe and Uninstalling the Solution:

Go to the Registration page and click **"Unsubscribe"**

Scaleable Forms: Congratulations! You have subscribed successfully.

[Registration](#) [Configuration](#)

[General Information](#)

[Edit](#)

First Name * Last Name *

Company * Phone *

Email * Alternative Email

Country * State/Province *

City * Postal Code *

Address1 *

Address2

☐ I agree with Terms and Conditions

[Update Payment Details](#) [Unsubscribe](#)

Note: Payment will be processed every month unless you have unsubscribed.

Then go the **Settings > Solutions** and click on **Delete** button to delete solution.

Dynamics 365 **Settings** **Solutions**

You need to assign security roles to new users [Click to see a list of users who need Microsoft Dynamics 365 Security Roles.](#) [Assign Roles](#)

All Solutions

[Delete](#)

	Name	Display Name	Version	Installed On	Package T...	Publisher	De
<input checked="" type="checkbox"/>	ScaleableForms	Scaleable Forms	1.0.0.15	1/9/2020	Managed	Scaleable Solutions	
	MicrosoftDynamics_Li...	Dynamics 365 Connec...	1.13.1002...	1/7/2020	Managed	Dynamics 365	Dy
	LinkedInLeadGenInteg...	LinkedIn Lead Gen for...	1.13.1002...	1/7/2020	Managed	Dynamics 365	Th