INSTALATION AND USER GUIDE

Infobip extension for Microsoft Dynamics 365 Marketing
## CONTENTS

1 MICROSOFT DYNAMICS 365 MARKETING ................................................................. 3
  1.1 Installing Infobip Solution ............................................................................. 3
  1.2 Configuration .................................................................................................. 5
    1.2.1 Creating new Infobip account ................................................................. 5
    1.2.2 Connecting existing Infobip account ....................................................... 9
    1.2.3 Possible errors linked to configuration .................................................... 11
  1.3 Delivery reports and MO messages ............................................................... 13
  1.4 Managing roles .............................................................................................. 13

2 FEATURES ............................................................................................................. 14

3 SENDING MESSAGES ......................................................................................... 15
  3.1 Templates ....................................................................................................... 15
  3.2 Sending a Single Message ............................................................................. 16
  3.3 Multiple messages (Customer Journey) ........................................................ 17

4 MESSAGE PERSONALIZATION ........................................................................... 21

5 ADDITIONAL FEATURES .................................................................................. 23
  5.1 Relations ....................................................................................................... 23
  5.2 Consent ......................................................................................................... 24
  5.3 Reports ......................................................................................................... 25
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. It is built exclusively on the new *Unified Interface* for Dynamics 365 applications (responsive web design providing an optimal viewing and interaction experience on any device).

It enables businesses to:

- Create and nurture leads
- Align sales and marketing
- Make informed decisions
- Innovate with an adaptable platform
- Communicate with customers via multiple channels

A bundle of apps and solutions, carefully selected to support marketing departments, are included:

**Infobip SMS & Viber extension**

Create and send multiple marketing campaigns with Infobip extension for SMS and Viber. Under the messaging tab, it’s possible to create templates, send and track messages, and create actions based on delivery reports. This feature is currently available only with Dynamics 365 Marketing.

### 1.1 Installing Infobip Solution

Installation and first Infobip configuration needs to be performed by an user with the *System Administrator* role.

Click on *Get it now* and sign in with your Dynamics credentials if you are not already signed in, after which click *Continue*. You will be taken to your Dynamics instance for installation.

Choose the organization and accept the Microsoft terms to continue with the installation.
After that you will be taken to Dynamics 365 Administration Center where you can keep track of all your solutions and pending installations.

Select a preferred solution to manage on selected instance: infobipdeploy22

After installation has finished, Infobip plugin will be visible in the Marketing application.
1.2 Configuration

After deployment, it's necessary to connect Infobip Account with Dynamics in order to use Infobip messaging services. To use Infobip's messaging channels it's necessary to have an Infobip account with SMS and/or Viber senders registered. If you already have Infobip account set up, please jump to section 1.2.2.

1.2.1 Creating new Infobip account

**IMPORTANT**: It's necessary that the first configuration is created by a System administrator, in order to give proper consent to Infobip to send MO messages and delivery reports to Dynamics.

Navigate to Marketing > Settings > Configuration.

Give consent to Infobip application to access your Dynamics Instance. This can be done at the top of the menu bar as shown on the picture below.

After that click on New to create new Configuration file. At the bottom of the configuration window there is a link [Get your Infobip API key here](#).
Link will take you to Infobip’s site where you can create a new Infobip account. Please fill out the registration form shown on the picture below. Detailed instructions on this [LINK].

After you finish your registration, check your email inbox for a confirmation email. Click on the confirmation link which will take you to the page below where you need to input your new username and password.
After you set up your login credentials, another window will open where you can login into the Infobip Web Interface which is shown on the picture below.

There you will see your API KEY. Treat this data seriously and confidentially. Never share the API key with anyone. Change API keys at least once a year. You can manage your API keys by clicking on **MANAGE API KEYS** on the homepage.
Please copy the key and paste it into the configuration file. Name your configuration file and save it.

After all the necessary data is filled out and saved, it’s necessary to set the configuration to Live. It’s possible to have multiple configurations but only one can be live, which can be convenient when having multiple SMS or Viber senders.

After setting the configuration to a live status, it’s advised to test the service. This is done by sending a single message which is explained under section 3.2. Sending a single message.

You have 50 free messages for testing purposes. In order to get a permanent SMS Sender, you need to buy an SMS number. This can be done over Infobip Web Interface under Settings > Numbers > Buy Numbers.

Once you spend your free messages, standard charging will apply. To top-up your account, click on „Add Funds”. Before you add funds to your account you need to:

- Provide Customer Information –individual or company information. Be sure to enter the right data, as you can’t change it once it is submitted. All invoices will be issued based on the information provided.
- Check the pricing for SMS. Any change in prices will be communicated via email.
- By accepting Service Terms and Conditions and reading the Privacy Policy you are entering into the binding relationship with Infobip.

NOTICE!

Viber has a separate registration process. In case you want to have a Viber sender please contact your dedicated Infobip account manager.
1.2.2 Connecting existing Infobip account

If you already have an active Infobip account with SMS and/or Viber senders registered, you only need to input your API key to connect with Dynamics!

**IMPORTANT**: It’s necessary that the first configuration is created by a System administrator, in order to give proper consent to Infobip to send MO messages and delivery reports to Dynamics.

Navigate to Marketing > Settings > Configuration.

Now click on New to create the configuration file, input the API key of your Infobip account, and Viber sender number if you are also using Viber. Name of the configuration completely depends on you.

API keys are managed on this [LINK](#). Treat this data seriously and confidentially. Never share the API key with anyone. Change API keys at least once a year.
After all the necessary data is filled out and saved, it's necessary to set the configuration to *Live*. It's possible to have multiple configurations but only one can be live, which is convenient when having multiple Viber senders.

Confirm Go Live

Do you want to Go Live with this Configuration? If any other Configuration is live it will be stopped.
This action will change the status of the Infobip Configuration to Live.

After setting the configuration to a live status and giving consent, it’s advised to test the service. This is done by sending a single message which is explained under section 3.2. *Sending a single message.*
1.2.3 Possible errors linked to configuration

When creating new configurations, Dynamics checks Infobip Platform to verify if the API key is correct. In case there are any mistakes in the API key following error will occur.

![Business Process Error](image)

In case a Viber sender number in configuration file hasn’t been written properly, when sending single messages to test the service, the delivery report will return an error as shown below.

![New Infobip Viber Message](image)
In case there is no live Infobip configuration following errors will occur:

- When sending single messages

![Image of an Infobip Viber Message with status and error information]

- When activating Customer Journeys

![Image of a Business Process Error dialog with plugin execution error message]

Plugin execution error: There is no live Infobip configuration.

Error code: 0x80040265
Session id: 2bc86e1a-3196-413e-90fe-97075ee72247
Activity Id: bdd47a38-6bf5-402d-a8ac-3196c55e37bf
Time: Tue, Jan 27 2020 12:23:12 GMT-0100 (Central)
1.3 Delivery reports and MO messages

For delivery reports and mobile originated messages to work, Infobip needs to push some information towards Dynamics platform. In order to do this, Infobip needs certain data from Dynamics which can be obtained by sending a single test message. Please contact your dedicated Account Manager from Infobip to set up DLRs and MOs.

1.4 Managing roles

For each new or existing user, it’s necessary to configure the access to the Infobip messaging solution. It’s possible to choose between the Infobip Messaging User or the Infobip Messaging Admin. As Admins, users can create, modify or delete the configuration after System Administrator has created the first configuration. Messaging Users can only use the solution and don’t have access to Infobip configuration.
2 FEATURES

As you engage potential customers, they start by discovering your product, evaluating whether it meets their needs, looking for a good offer, and finally make a purchase. This process is called the *customer journey*.

In customer journeys, you can create a model that helps guide members of a selected marketing segment through the process by using automated messaging, activity generation, interactive decision points, and more. With Infobip Messaging larger audiences can be reached through their preferred communication channels which in turn increases the success rate of a marketing campaign.

**Solution offers two communication channels:**
- SMS
- Viber

**It also provides two ways to send messages:**
- Using the Customer Journey (campaigns)
- Using the Message form (single)

No matter how you choose to send a message, a set of requirements need to be met in order to use the solution. It's recommended to have this prepared and configured before the deployment.

- Infobip account with at least one number used for sending messages
  - Different communication channels require different setup
- Infobip Configuration needs to be valid
- Sender activities need to be active

This manual presumes you are familiar with the Dynamics 365 Marketing application and custom entities used in the solution.
3 SENDING MESSAGES

3.1 Templates

Before sending any messages, you must create a template. This can be done under the Infobip Messaging tab or when you are sending the messages.

The figure below shows how to create a Viber template using the Infobip Messaging Tab.

When the template is finished and saved, it’s necessary to go live with the template before using it for campaigns. Once you make templates live, it’s not possible to change the content of the message anymore.

![New Infobip Viber Template](image)

**IMPORTANT**: When choosing contacts, keep in mind that Dynamics pulls numbers from the mobile phone attribute in the contact, not business phone!
3.2 Sending a Single Message

Sending a single message is a feature primarily intended for testing.

By sending a message to a single device, you can test the visual aspect and the personalization feature that enables you to use placeholders from the selected Contact entity.

All the messages created this way will have a notification informing the user it was created manually.

Create a new message

When selecting a template, all the data will be populated automatically based on the selection and the fields will be locked.

A new template can also be generated within this tab. You can select a contact from your contact list or input the number manually.

Send

When the entity is saved, a Send button will appear.

The message will have a Waiting Status until the message has been sent. After that, the Status will be updated accordingly when the delivery report is pushed to the platform.
3.3 Multiple messages (Customer Journey)

When using Customers Journeys it’s possible to create the Customer Journey templates which can be used multiple times or start from scratch with a blank template.

If you choose a blank template, it’s necessary to design the entire journey and fill in the necessary data. Remember that before using a template you need to set it to Go Live. This is done to avoid the potential problem of changing the template data in the middle of the Customer Journey execution which would result in different message content based on the same template.

When the Status Reason is Live, the Stop button will appear.

When pressed, it will change the Status Reason to Stopped. This will enable the Name field and the template will not be available for selection in Customer Journey.

You can only use the Stop button if the template is not being used in any of the Live Customer Journeys. If that is not the case, there will be a notification, and the action will be prevented.

Whether you go live or stop the template, a confirmation dialog will pop up before the action is executed informing you of the changes and consequences of this action.

Create a new Customer Journey

In this example, we will use a Blank template and build the campaign from scratch.
Insert Custom Channel in Customer Journey

From the Customer Journey Toolbox, under the Custom content section, select the custom channel tile.

Pick the template for SMS/Viber

Select the custom channel in the designer and select the template under the Properties tab.

The custom channel tile will display the template name.

After saving, the selected templates will be associated with the customer journey. This enables the validation previously mentioned in the Go Live/Stop (Template) step.

You can inspect the relations by going to the Infobip SMS/Viber Templates under the Related tab in Customer Journey.

When going over the template details, you can also view the associated Customer Journeys under the Related tab.
Trigger events

After Infobip extension tiles, it's possible to use trigger tiles in order to set an action which will be executed based on the delivery report or returned message from the end user via SMS or Viber.

For example, you can recognize keywords and send messages like “In case you would like someone to contact you send yes.” where you are recognizing the keyword yes. If customer responds with yes you can create a new activity based on that response.
In the example below, the campaign is primarily sent to Viber users. If the message is not delivered within one hour then it will be sent via SMS instead. After the campaign is started, you can see how many contacts have entered the flow and in which way. With such failover scenarios you can ensure you are reaching all of your customers.

Go Live

After the journey is good to go, click **Go Live**.

When going live, check is performed to determine if Infobip custom channels are being used. If that is the case, all the templates used in those custom channels have their Status Reason checked. If it is not Live (e.g., it was **Stopped** after it had been selected), the action is canceled, and an error pop-up is displayed indicating at least one of the templates is not in status *Live*.

When the Customer Journey starts, it will run through the flow for each Contact in the segment. When the execution reaches the custom channel tile, it will create the message (Status Reason – *Waiting*) based on the selected template.

The workflow will be triggered on *Create event* of the message entity and it will perform the logic necessary to send the message to the Contact. After the message is sent, the Status Reason will be updated accordingly when the delivery report is pushed to the platform.

It is important to remember that the Contact may have different communication preferences. When inspecting the Contact entity, navigate to **Details** and find the **Contact Preferences** section.

There are fields for each of the custom communication channels which indicate if the Contact wants to communicated through that channel. If set to **Do not Allow**, no message will be created in the Customer Journey for that channel.
4 MESSAGE PERSONALIZATION

This feature enables you to define placeholders which will be replaced with values from the related Contact entity.

To define a placeholder, you need to use double curly brackets to open and close a placeholder. Also, a field's logical name needs to be used as the placeholder content.

For example, if you want to personalize a message by greeting the user using their name, you would define a message text like this: Hi {{firstname}}!

When inspecting messages created in Customer Journey, you will see that the message text contains bound values. That is not the case when sending a single message, so you will still see a placeholder in the message text.

Available placeholders:

<table>
<thead>
<tr>
<th>Real Value</th>
<th>Variable name {{x}}</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>firstname</td>
</tr>
<tr>
<td>Last Name</td>
<td>lastname</td>
</tr>
<tr>
<td>Full Name</td>
<td>fullname</td>
</tr>
<tr>
<td>Job Title</td>
<td>jobtitle</td>
</tr>
<tr>
<td>Account Name</td>
<td>parentcustomerid</td>
</tr>
<tr>
<td>Email</td>
<td>emailaddress1</td>
</tr>
<tr>
<td>Business Phone</td>
<td>telephone1</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>mobilephone</td>
</tr>
<tr>
<td>Fax</td>
<td>fax</td>
</tr>
<tr>
<td>Address 1</td>
<td>address1_composite</td>
</tr>
<tr>
<td>Address 1: Country/Region</td>
<td>address1_country</td>
</tr>
<tr>
<td>Address 1:County</td>
<td>adress1_county</td>
</tr>
<tr>
<td>Address 1:City</td>
<td>address1_city</td>
</tr>
<tr>
<td>Address 1:Address Type</td>
<td>address1_addresstypecode</td>
</tr>
<tr>
<td>Contact</td>
<td>contactid</td>
</tr>
<tr>
<td>Education</td>
<td>education</td>
</tr>
<tr>
<td>Nickname</td>
<td>ibdyncrmNickname</td>
</tr>
<tr>
<td>Department</td>
<td>department</td>
</tr>
<tr>
<td>Relationship Type</td>
<td>customertypecode</td>
</tr>
</tbody>
</table>
Infobip solution also enables use of emoticons. Open the emoticon window and add emoticons by clicking Windows + Colon (:) keys.
5 ADDITIONAL FEATURES

5.1 Relations

To allow proper validation and better data segmentation, several relations were implemented which you can use to track where each entity was used and how they associate with one another:

Customer Journey
- Infobip SMS/Viber Messages
- Infobip SMS/Viber Templates

Infobip SMS/Viber Template
- Infobip SMS/Viber Messages
- Customer Journeys

Contact
- Infobip SMS/Viber Messages

Associated entities can be found under the dedicated (in SMS/Viber Template) or under the Related tab in each of the entities.

By using these relations, the entire messaging solution is checked and ensured.

For example, it's not possible to Go Live with Customer Journey if all the associated message templates are not Live and vice versa. This means you will never be able to Stop the message template if it is being used in a Live Customer Journey.
5.2 Consent

Infobip solution enables tracking messaging preferences for each contact. In case there’s a confirmation from the client side, (for example subscription process filled online) there is a box in a contact info which can be ticked.

<table>
<thead>
<tr>
<th>CONTACT PREFERENCES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Method</td>
<td>Any</td>
</tr>
<tr>
<td>Email</td>
<td>Allow</td>
</tr>
<tr>
<td>Follow Email</td>
<td>Allow</td>
</tr>
<tr>
<td>Bulk Email</td>
<td>Allow</td>
</tr>
<tr>
<td>Phone</td>
<td>Allow</td>
</tr>
<tr>
<td>Fax</td>
<td>Allow</td>
</tr>
<tr>
<td>Mail</td>
<td>Allow</td>
</tr>
<tr>
<td>SMS</td>
<td>Allow</td>
</tr>
<tr>
<td>Viber</td>
<td>Allow</td>
</tr>
<tr>
<td>Prefill marketing form</td>
<td>Do not allow</td>
</tr>
</tbody>
</table>

It’s important to differentiate this from Viber and Infobip blacklists. Some countries require an unsubscribe option when sending SMS messages. If users click on the unsubscribe link they will be added on the Infobip blacklist which can be seen on this [LINK](#) under Blacklist.

When receiving Viber messages for the first time, users will be asked to confirm that they want to receive messages from that sender. If they do not agree, the sender will not be able to send any more messages. Users can also unsubscribe at any moment if they wish to do so.

These blacklists are not connected to the Contact Preferences tile. Contact Preference tile’s purpose is to keep track of consent given by users directly to the enterprises.

**IMPORTANT:** If consent is set to Not Allow, Dynamics will block sending messages via Customer Journeys, while test sending via Sending Single message is still enabled.
5.3 Reports

To get insights into sent campaigns, all sent messages are listed under the Infobip Messaging tab. Messages are filtered by Status Reason, Date or Contact. It’s possible to see how many messages were delivered or how many messages were sent per campaign.