A True Integration between Typeform & Microsoft Dynamics 365 Sales

Dynamics 365 Sales

Microsoft

USER GUIDE

SCALEABLE FORMS - FOR MICROSOFT DYNAMICS 365 SALES

BY

Scaleable SOLUTIONS
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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
**Configuration** ........................................................................................................................................ 8
**How to get Typeform PAT** .................................................................................................................... 9
**Assign Roles.** ......................................................................................................................................... 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 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:

Click on Registration to get yourself registered.

Here on Registration form, fill out the **General information** > Enter your **CRM Credentials** > Select your **Subscription Plan** > check **Terms and Conditions** > and then hit **Submit Button**.
Note: It is recommended to create a non-interactive user to avoid hitting your API Limit and assign “Scaleable Forms Service” role to the user. Learn More...

After your subscriptions you will receive invoice via email on provided email address. In case you didn’t receive Invoice reach us at support@scaleablesolutions.com

Click “Pay this invoice”
Click on “Payoneer” to process the payments.

Configuration

After Registration you need to configure by saving Typeform PAT

Click on **Configuration** >Enter Typeform PAT > Save
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](https://admin.typeform.com/signup)

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

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

To assign roles to the users go to Settings > Security > Users
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 whose credentials are provided in the configuration screen.
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

![Contact Form](Image)
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.

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

**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.

Click on the created configuration. For example, “Contact Form”
Note: Wait as per the specified sync duration time to get back responses.

Click on Related > Click on Contacts

Click on any contact.
You will see the details of the Contact.

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.

**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.

**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.

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
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.

Open a response to view details
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.
Dashboard

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

No. of Responses Left will be a progress doughnut chart, it will display the total number of responses received and left in the package.

Unsubscribe and Uninstalling the Solution

Go to the Registration page and click “Unsubscribe”
Then go the Settings > Solutions and click on Delete button to delete solution.

**Note:** If the Solution (Scaleable Forms) is not unsubscribed then you will continuously receive the invoice according to your selected package. So, it's better to unsubscribe the Solution first to avoid this situation.