

Getting Started with Dynamics 365 and the Power Platform

Walkthrough Guide

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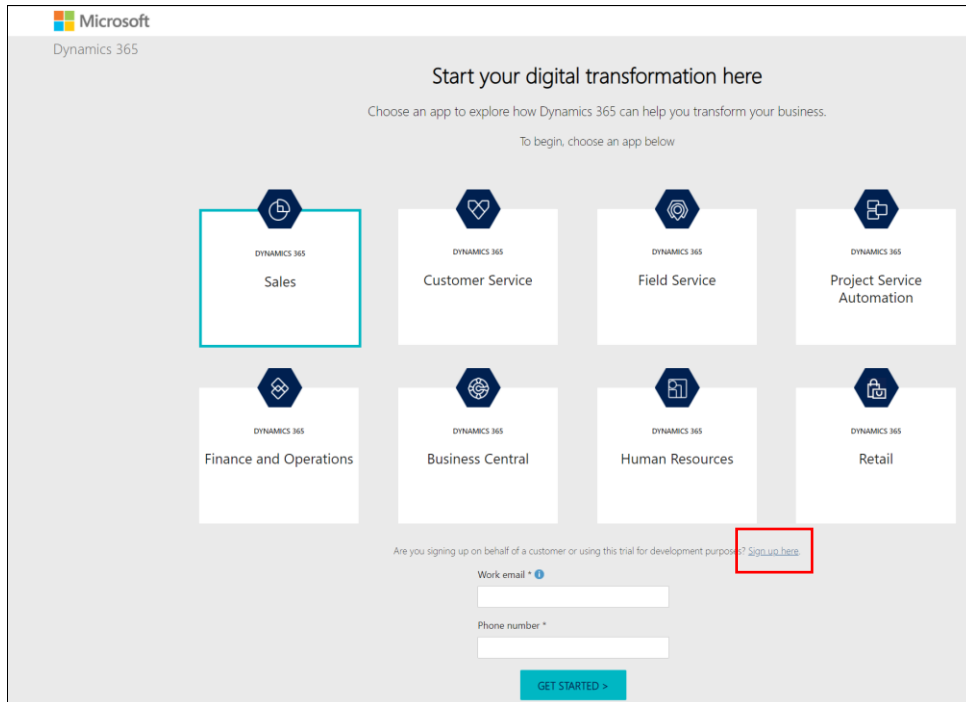
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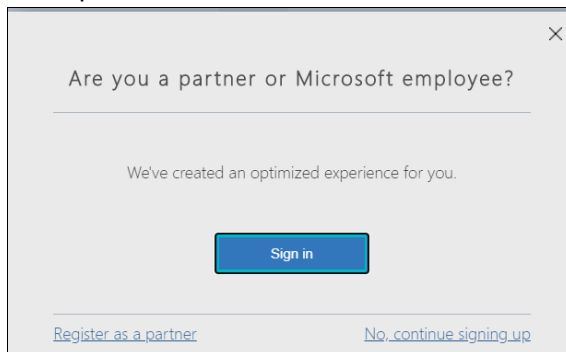
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How to set up a Dynamics 365 Trial and create your first tenant

1. Open a web browser and navigate to trials.dynamics.com and click “Sign up here”.
**If you are already logged in with another Microsoft 365 account, you may need to open an incognito browser.*



2. You will get a pop-up asking you if you are a partner or Microsoft employee. Always try to be honest, but in this case we're going to click “no and continue signing up” so that we can see the full experience.



3. Enter your email address, then provide the necessary information required. You must provide a phone number where you can either be texted or called with a verification code to prove that you are not a robot.

Microsoft

Thank you for choosing **Dynamics 365 Customer Engagement Plan**

1 Signup started

2 Tell us about yourself

● ●

First name Last name

This is required

Business phone number

Company name Your company size

Country or region
United States

Next

3 Create your business identity

4 You're all set

4. Once the code is verified, you will be able to create your new domain, which will be the unique name used to identify your Dynamics 365 tenant. Finish creating your business identity user and sign up.

Microsoft

Thank you for choosing **Dynamics 365 Customer Engagement Plan**

1 Signup started

2 Nice to meet you, James

3 Create your business identity

● ●

To set up your account, you'll need a domain name. [What is a domain?](#)

You'll probably want a custom domain name for your business at some point. For now, choose a name for your domain using **onmicrosoft.com**

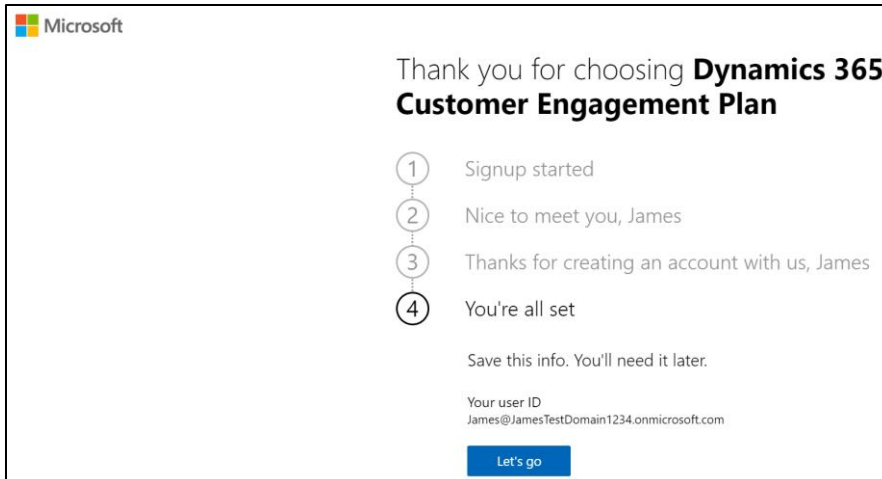
yourbusiness
JamesTestDomain1234 .onmicrosoft.com

JamesTestDomain1234.onmicrosoft.com is available.

Check availability Next

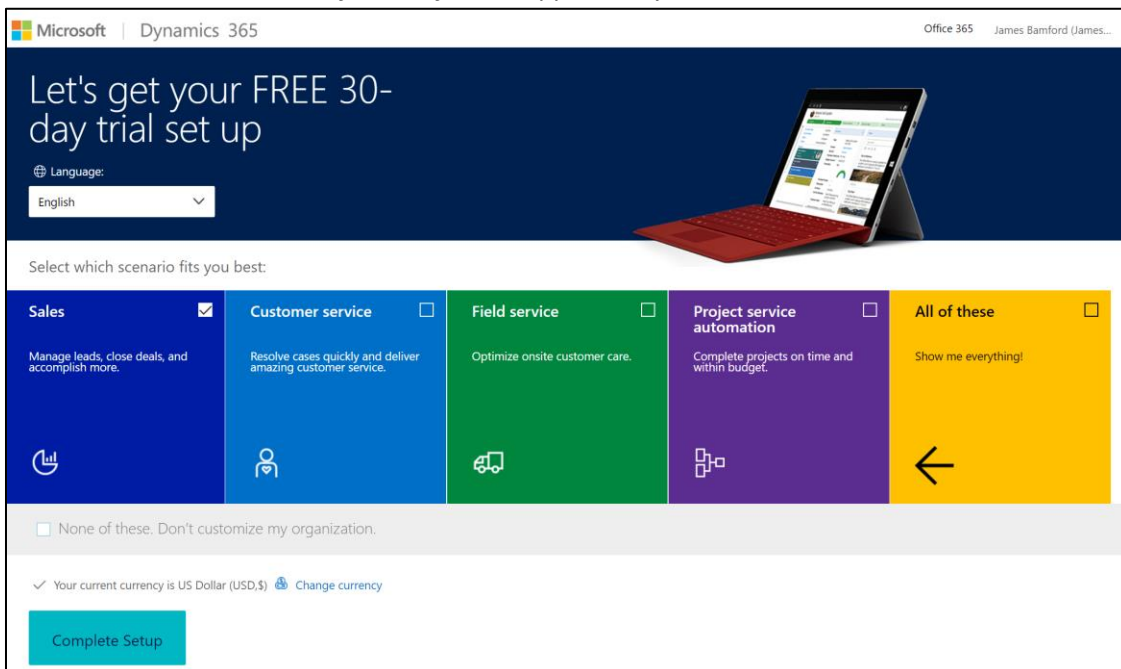
4 You're all set

5. You will then be able to navigate to your newly created tenant.

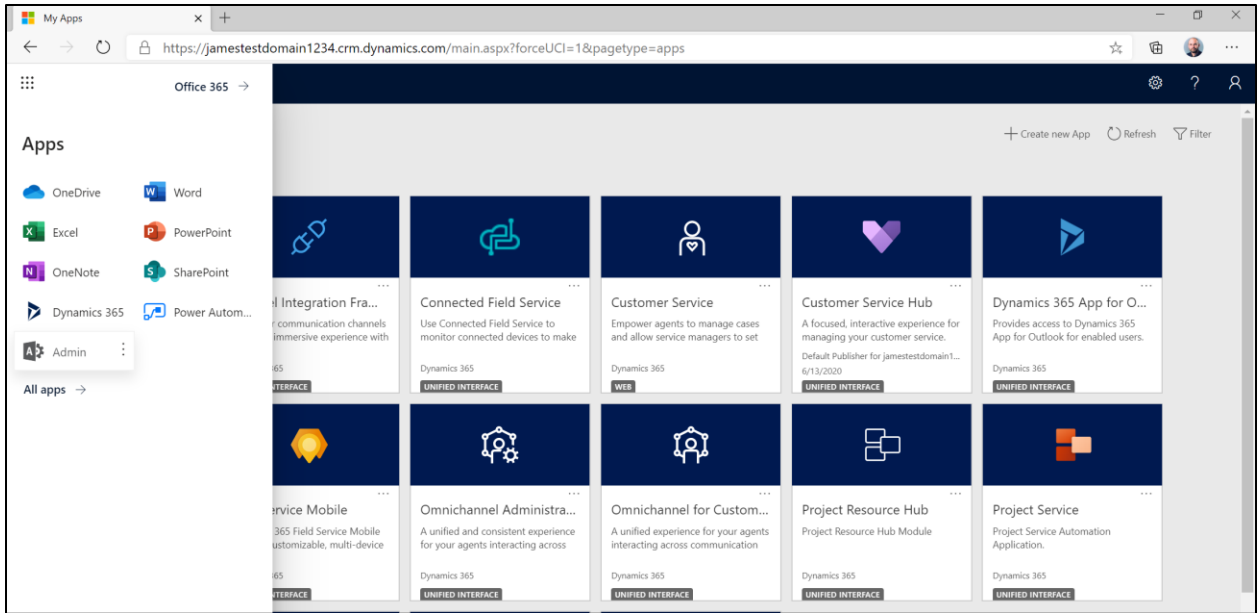


6. Select at least one first party app to get started with (you can select more later if you wish). This will complete your setup.

**You could also select none if none of these apps meet your business needs.*

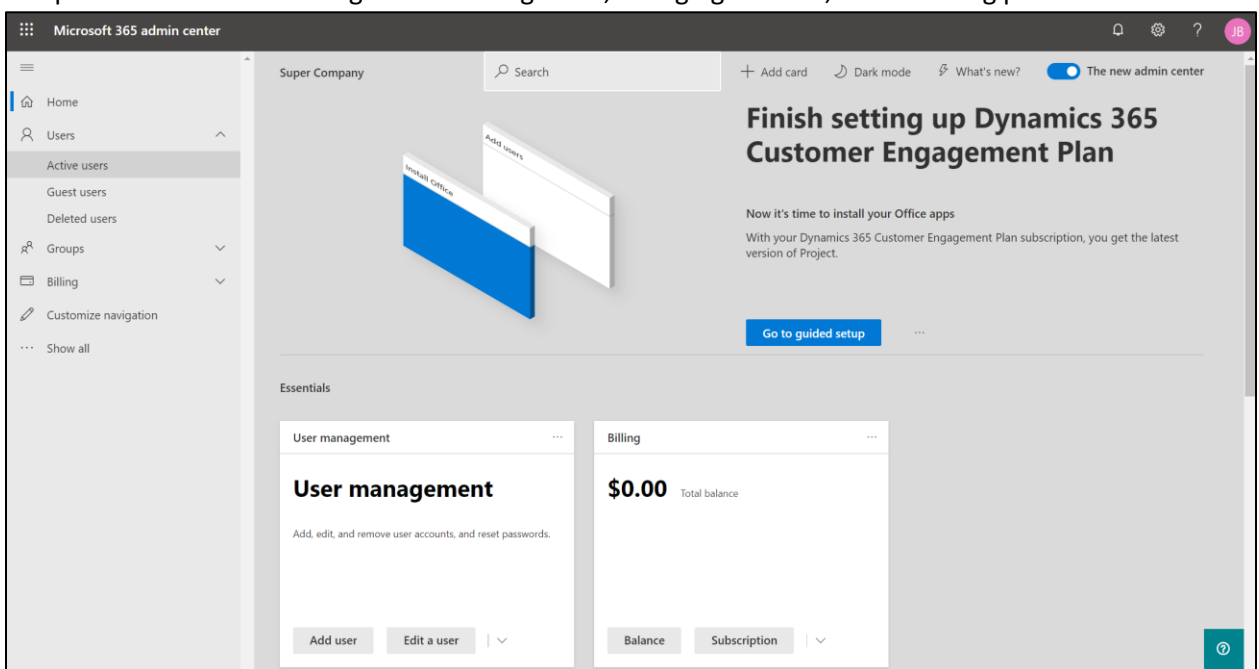


7. You will then be navigated to your newly created tenant. From here, you can open the menu in the upper left-hand corner to navigate to the Admin center to continue your setup.

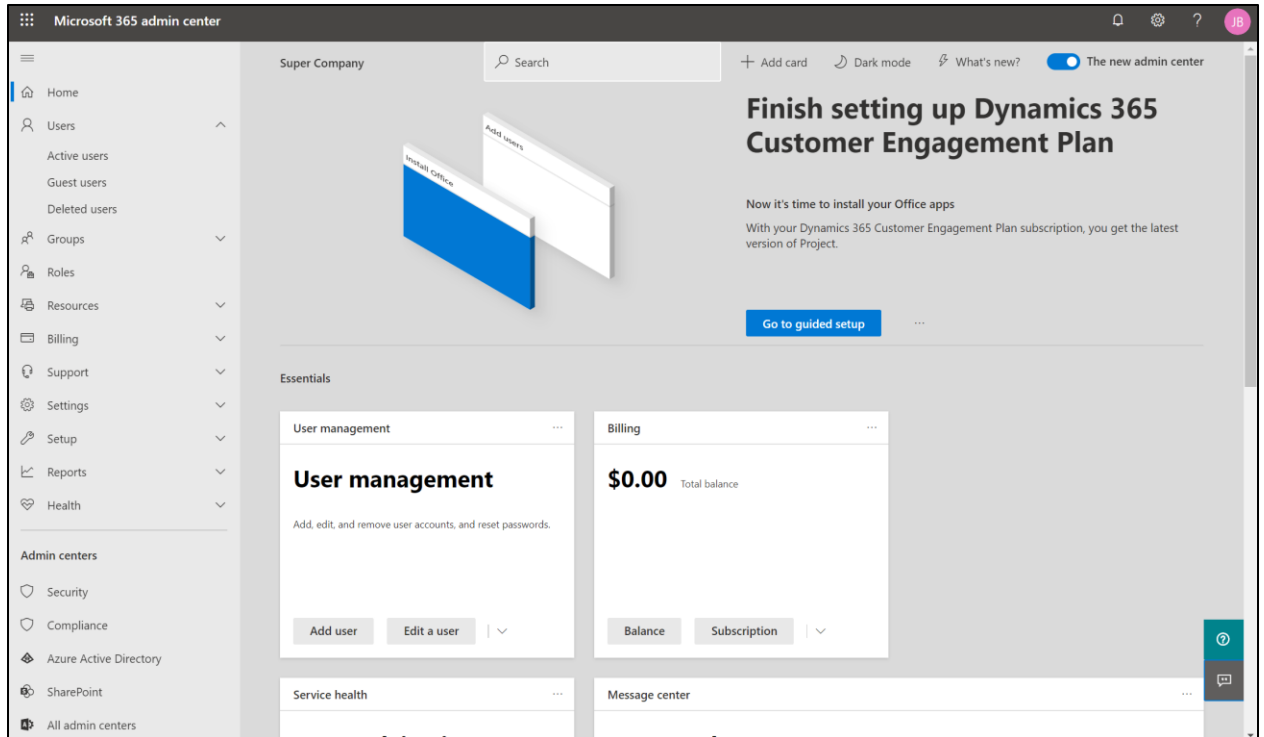


Navigate the Microsoft 365 Admin Center

1. The Microsoft 365 admin center is where you manage your business in the cloud. You can complete such tasks as adding and removing users, changing licenses, and resetting passwords.



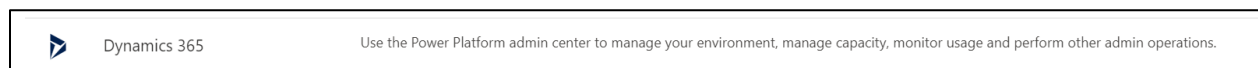
2. If I expand the list, I'm able to see many more options like opening a ticket with Microsoft Support, or checking in on the overall health of my tenant. If I scroll further down, I can look at all the individual admin centers for platforms like Dynamics 365 and Power Apps.

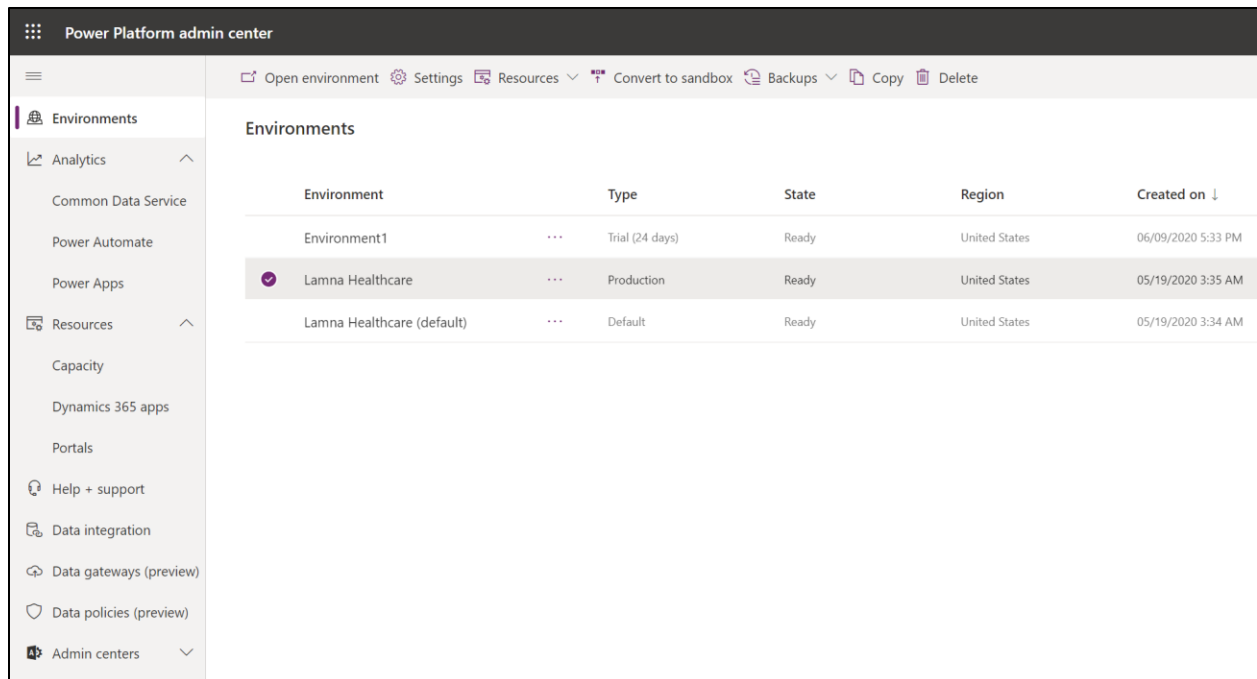


Navigate the Power Platform Admin Center

The Power Platform admin center provides a unified portal for administrators to manage environments and settings for Power Apps, Power Automate, and model-driven apps in Dynamics 365.

Expand “All admin centers” and click Dynamics 365. This will take you to admin.powerplatform.microsoft.com.





Currently, the admin center provides the following capabilities:

Firstly, this is where you will go to manage your Power Platform environments. We've mentioned before how a tenant can be tied to multiple different environments, this is where you would go to manage them. In this area, you can view, create, and manage them via the command bar at the top. Here, you can do things like create a new sandbox, promote a sandbox to production, or vice versa. You can create a backup, restore from a backup, copy an environment, reset, or delete one.

Analytics will allow you to get a detailed view of key metrics for Power Platform apps. Common Data Service analytics will show you key metrics like Active users, API Calls made during a selected period of time, as well as total operations and failures to examine.

Power Automate analytics provides a view into the daily, weekly, and monthly run data of all flows in an environment.

Power Apps analytics provides a view into environment level usage, errors, service performance to drive governance, and change management services to users

Below that, we have our Resources section, which allows you to manage your Dynamics 365 model-drive apps or any Power Apps Portals that you may have installed, and section for any Help or technical support that you may need.

Finally, we have three sections that have to deal with data. The first is a point-to-point integration service used to integrate data into Common Data Service. It supports integrating data from multiple sources into the Common Data Service.

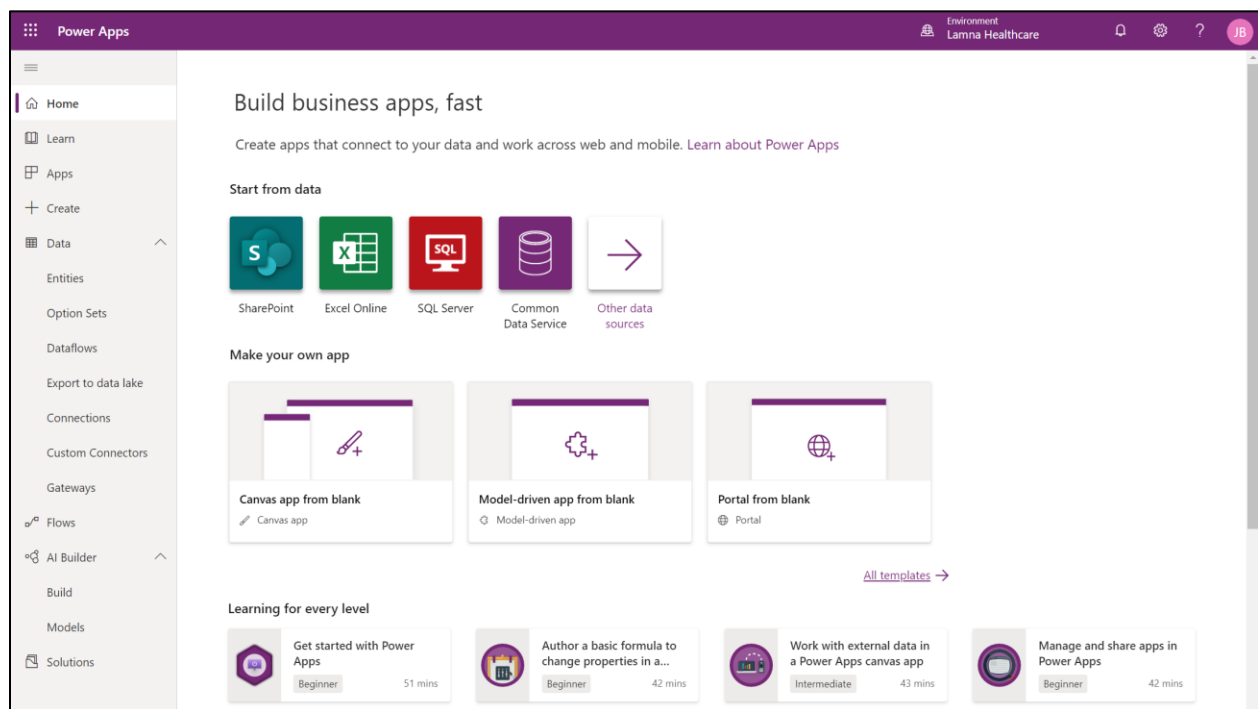
Data gateway management acts as a bridge, providing quick and secure data transfer between on-premises data.

Lastly, to protect data in your organization, you can use Power Apps to create and enforce policies that define the consumer connectors that specific business data can be shared with.

Navigate the Power Apps Maker Portal

Make.powerapps.com, also known as the “Maker portal”, is where you can get started with creating your business application solutions.

It contains Power Apps Studio, which is the app designer used for creating canvas apps, as well as the App Designer for building model-driven apps, and other important features. Let's take at everything we can do with the Maker portal.



For starters, the Maker portal is where you can run all the apps that you created, or that someone else created and shared with you. These apps are tied to specific environments, which we can also cycle through.

The maker portal also provides us access to the data for our environment. We can dig into the entities, or tables, in our database to see details on the fields, relationships, and even the data itself. We have access to cross-entity data constructs like Option sets,

The data section also gives us access to other tools like Dataflows, which were introduced to help organizations unify data from disparate sources and prepare it for consumption. Here, you can easily create dataflows using familiar, self-service tools to ingest, transform, integrate, and enrich big data.

This section also allows us to add or create custom connectors for our environment. You can also install an on-premises data gateway to transfer data quickly and securely between a canvas app that's built in

Power Apps and a data source that isn't in the cloud, such as an on-premises SQL Server database or an on-premises SharePoint site

Finally, you can use maker portal to also access the Flows, AI Builder, and solutions that have been installed on your environment.