Dynamics 365 Customer Insights

Lab 5: Extend the Solution with Dynamics 365

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Module Introduction

Having successfully ingested Contoso Coffee's data sources and created a Unified Customer Profile and calculated key measures, you are now able to leverage the insight you have generated to empower different personas within Contoso Cofee.

Empower Customer Service Advisers/Marketing team

As Project Manager for Contoso Retail, you need to empower Contoso Coffee Customer Service/Marketing Advisors to deliver the best possible experience to customers, in order to achieve the best possible customer satisfaction (CSAT) scores.

In this Module you will deliver insights to Contoso's existing Customer Service/Marketing application including: Unified Profile, KPIs and Active Segments from Customer Insights.

To do this you will configure the Customer Insights Customer Card Add-In to embed unified and enriched customer data from Customer Insights on the Contact form within Dynamics 365 for Customer Service/Marketing.

Objectives

- Configure Customer Insights Customer Card Add-In
- Configure Customer Insights card controls in Dynamics 365 Customer Service/Marketing
- Exporting segments and orchestrating customer journey with exported segments in Dynamics 365 Marketing

Prerequisites

To complete this lab, will need to have completed Lab 4

Approximate Time: 60 mins

Exercise 1 – Ingest the Dynamics Contacts

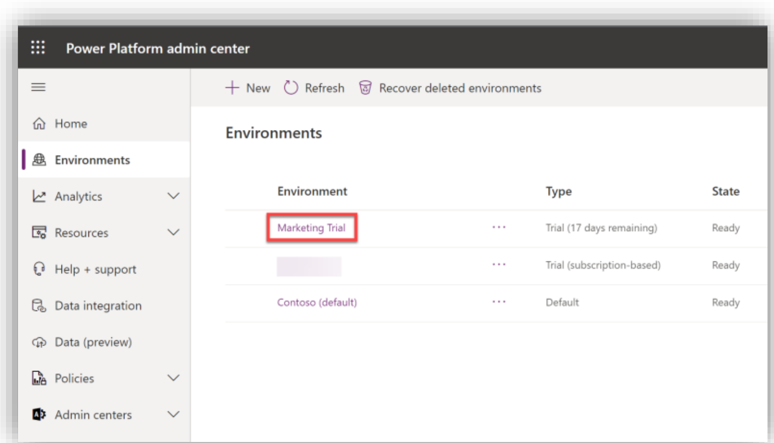
In oder for the Customer Insights Card to work in other Dynamics 365 products and to sync CI Segments to Dynamics 365 Marketing, you need contacts that are the same across those products. To do so, you will import Customer Insights contacts in to D365 Marketing, then you will set up a data source in CI to sync the data back from Marketing and then unify the data.

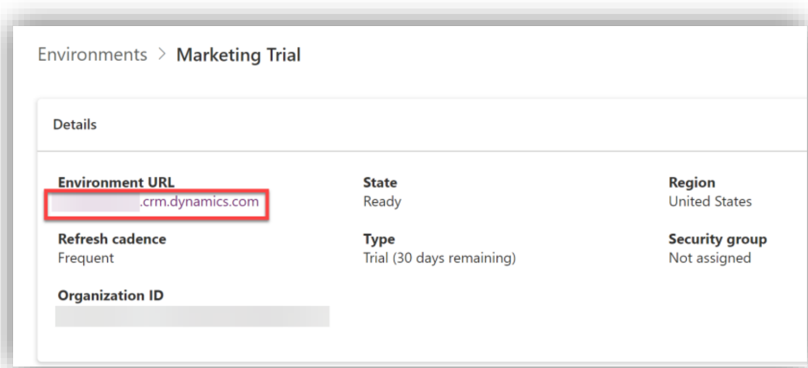
Note: This task is not one you would normally have to take if you were using Dynamics 365 as a data source to begin with, but since you are using trials in different environments, you will need go through a few steps to get the contacts in sync.

Task 1 - Import Contacts into Dynamics 365 Marketing

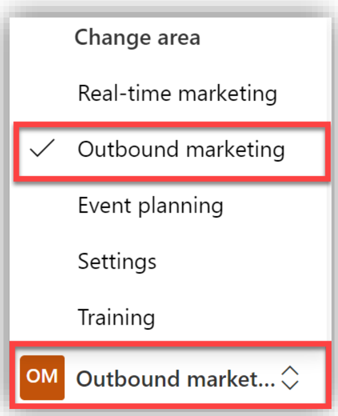
First, you'll import contacts (that are already in CI) into Dynamics 365 Marketing

1. Go to the D365 Marketing Trial environment. If you don't have it open or bookmarked, go to: **https://aka.ms/ppac** -> **Environments -> Marketing Trial** and click on the **Environment URL**

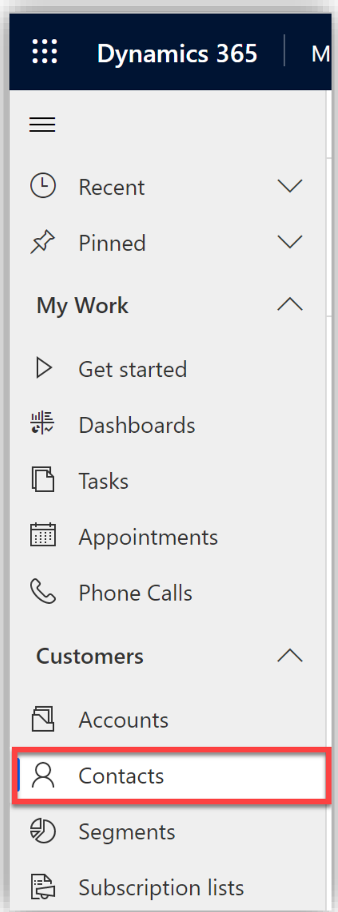




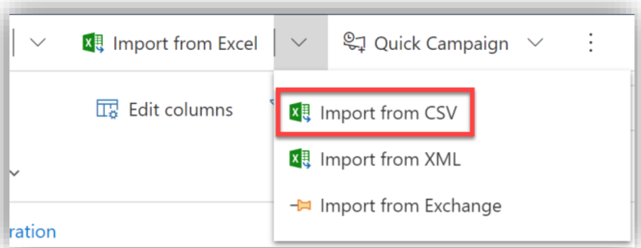
2. Go to **Outbound Marketing** (bottom left of screen)



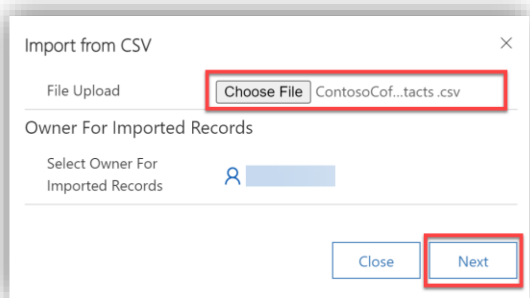
3. Select **Customers -> Contacts**



4. Select **Import from CSV** from the chevron next to **Import from Excel**

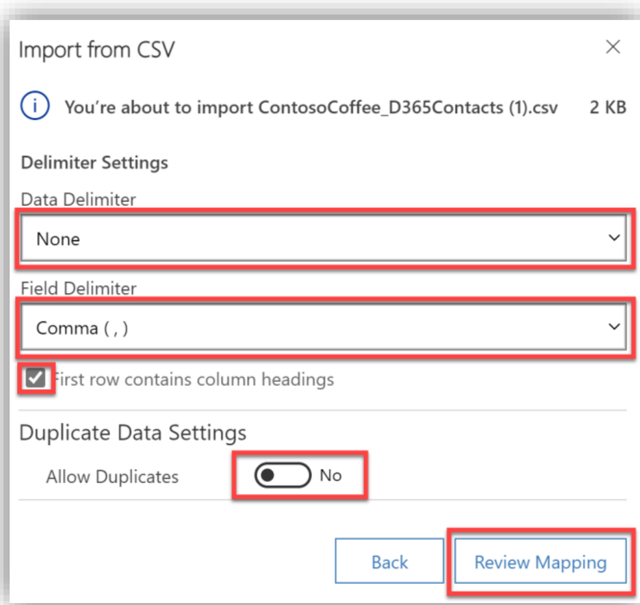


5. Click **Choose File**, select the **ContosoCoffee_D365Contacts.csv** and click **Next.**

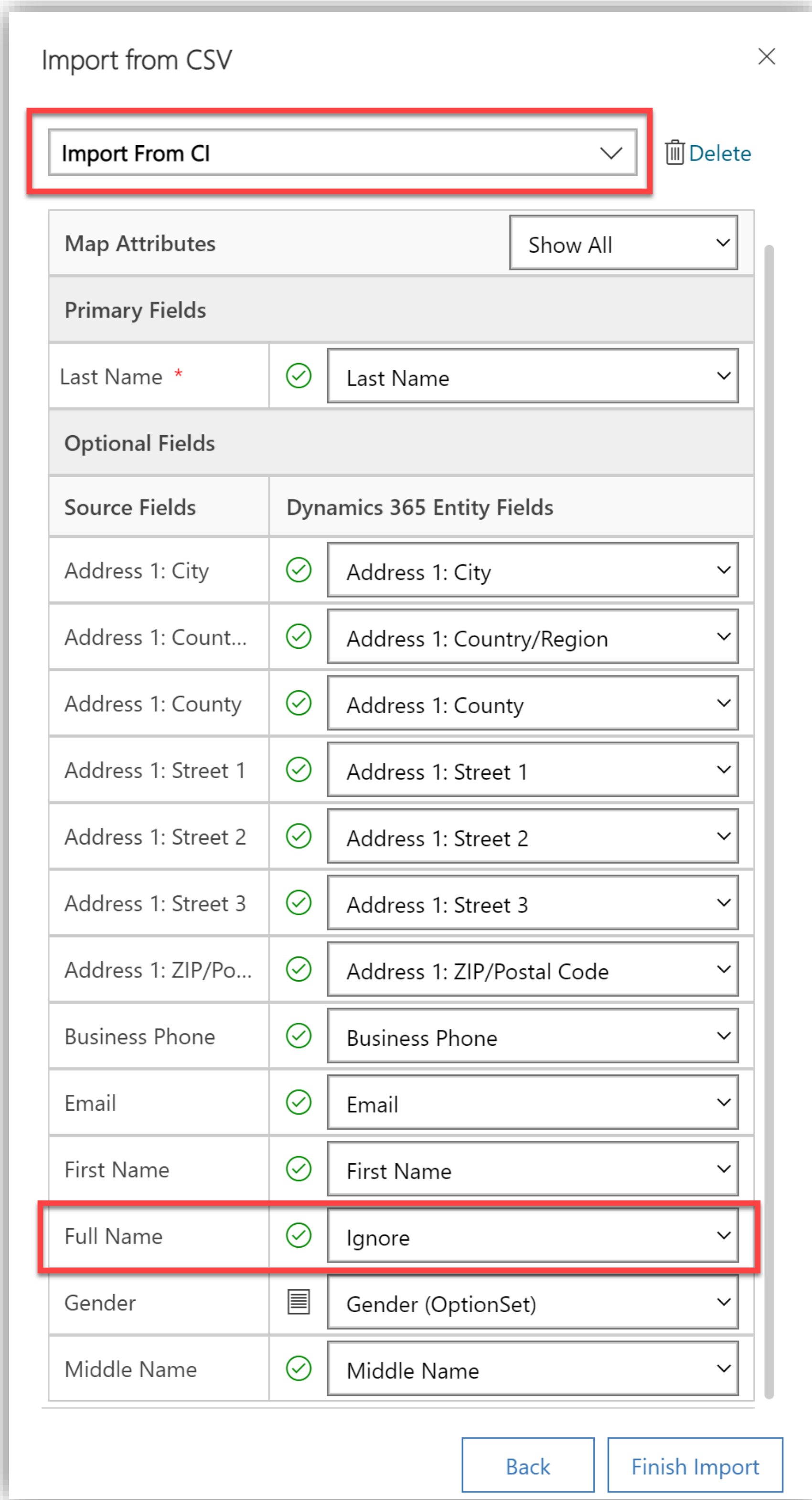


6. Set the following settings and click **Review Mapping:**

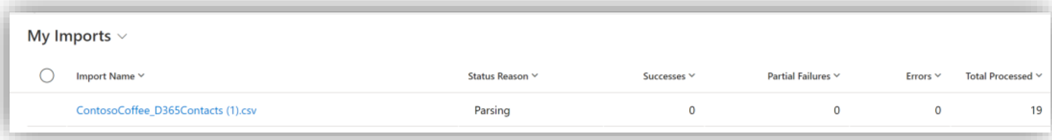
- Data Delimiter: **None**
- Field Delimiter: **Comma (,)**
- Check **First row contains column headings**
- Allow Duplicates: **No**



7. Name the import **Import From CI,** change the mapping of **Full Name** to **Ignore** and click **Finish Import**



8. You can monitor the progress of your import by clicking **Track Progress** (Click OK on the *Leave this page?* Pop-up)



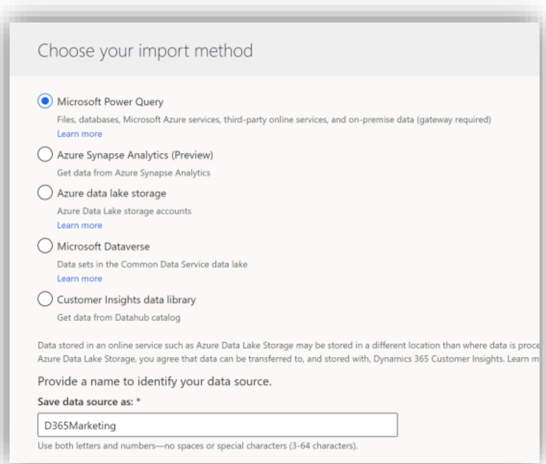
9. Once the import is complete, go to **Contacts**

10. You should now have a record for **Abbie Moss** (refresh the screen if you don't see Abbie)

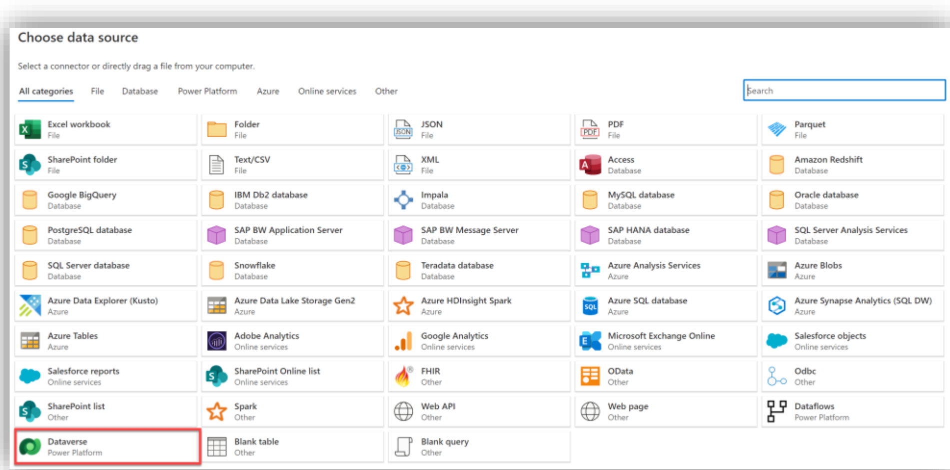
Task 2 – Ingest the contacts into Customer Insights

Now you'll ingest the Dynamics 365 Marketing contacts as an additional data source within Customer Insights.

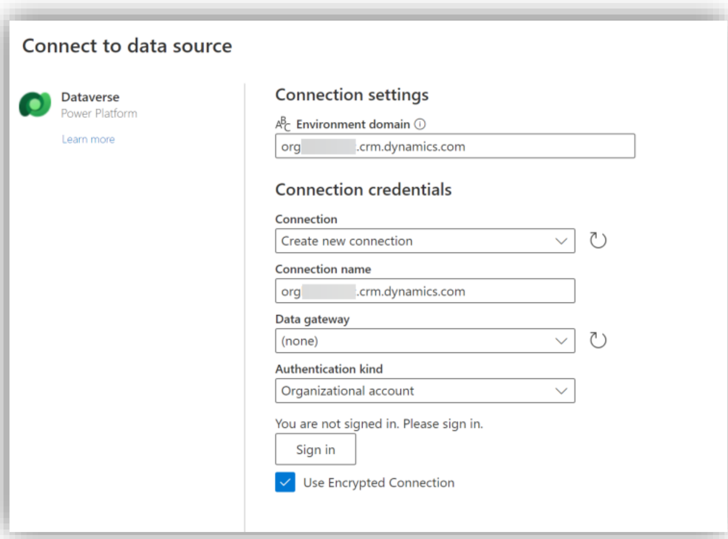
1. Switch back to your Customer Insights tab or re-open https://home.ci.ai.dynamics.com
2. Click **Data -> Data Sources** in the left hand menu
3. Click **Add Data Source** on the top left of the page
4. Choose **Microsoft Power Query** and name the Data Source **D365Marketing**, Click **Next** (*Note: You could use Microsoft Dataverse as the import method, but for the sake of time for the lab, you'll use Dataverse under Power Querey so that you can choose just the tables and columns that are needed.)



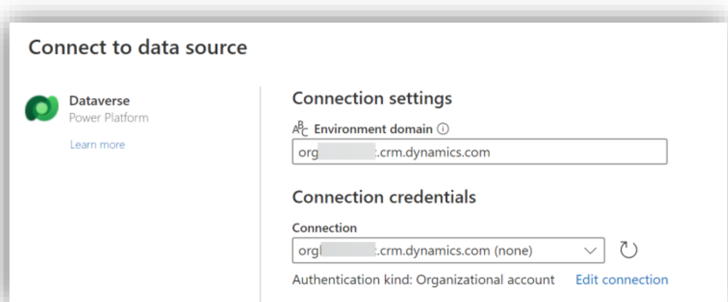
5. Select **Dataverse**



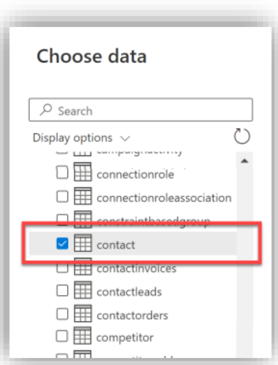
6. Enter the server address of your D365 Marketing app as the Environment domain. If you don't have the URL handy, go to https://aka.ms/ppac - **Environments -> Marketing Trial** and copy the **Environment URL link.** Click **Sign in** and sign in with your Marketing Trial credentials (should be the same account you've been using for all of the labs)



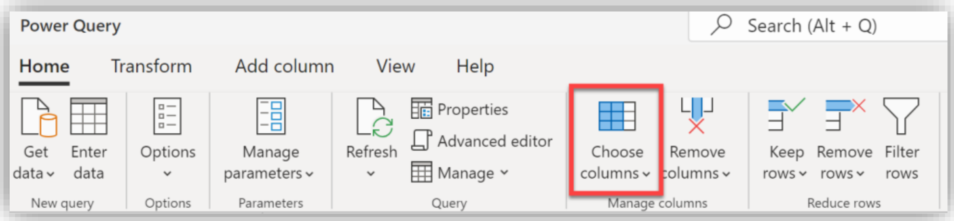
7. Once sign in is authenticated, click **Next**



8. Under Choose data, select **contact** and then click **Transform data** (you don't need to wait for the data to load before clicking Transform)

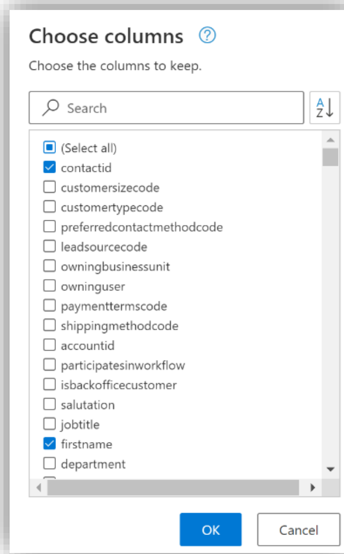


9. Since you're pulling the data from Dataverse, the column headers and data types are already configured correctly. Now just select the columns that are needed. Start by clicking on **Choose columns**

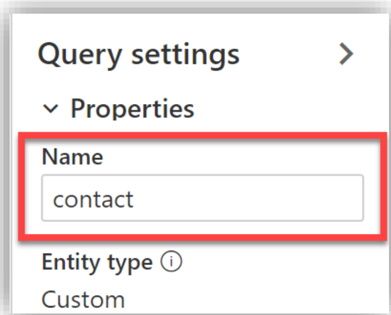


10. Uncheck **(Select all)** and then check the following columns (use search to help find the columns). Click **OK** when done

contactid	**address1_line1**
firstname	**address1_line2**
fullname	**address1_city**
lastname	**address1_stateprovince**
gendercode	**address1_county**
emailaddress1	**address1_country**
	address1_postalcode



11. Name the query **contact** and click **Save**

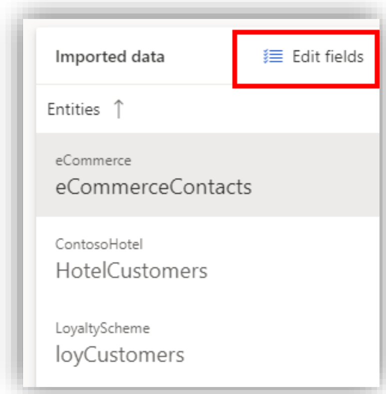


12. Leave Refresh settings as **Refresh manually** and click **Save**

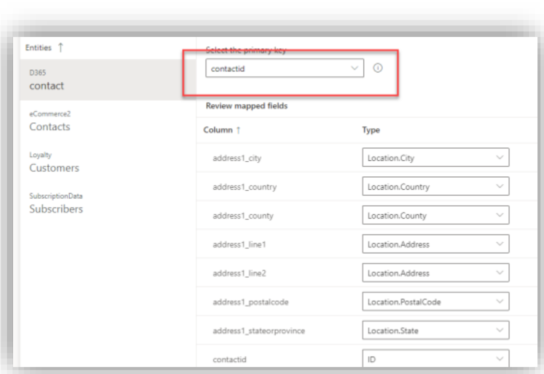
Task 3 – Go through Unification

Map

1. After the data source import is completed, you can start the unification process.



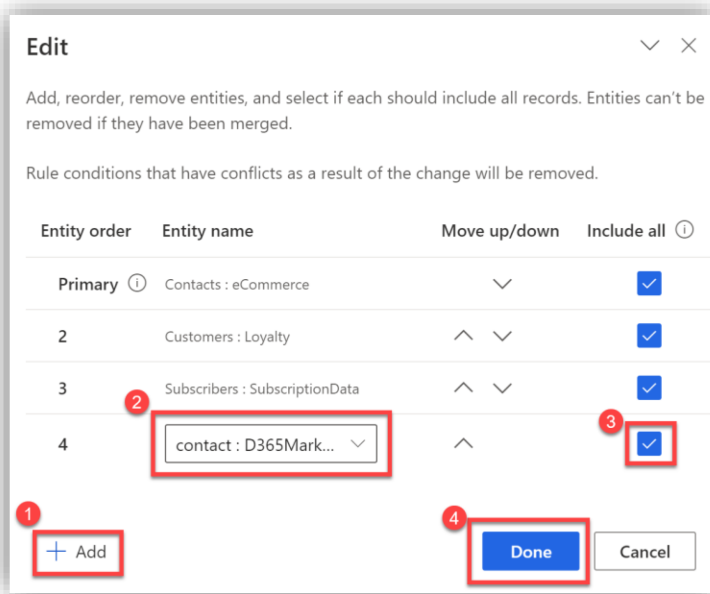
2. Click **Unify → Map**
3. Under **Entities** click **Edit fields**
4. Epxand the **contact (D365Marketing)** and select the all of the fields:
   - address1_city
   - address1_country
   - address1_county
   - address1_line1
   - address1_line2
   - address1_postalcode
   - address1_stateorprovince
   - contactid
   - emailaddress1
   - firstname
   - fullname
   - gendercode
   - lastname
5. Click **Apply**. Click on the **D365Marketing : contact** tile in the entities list. Customer Insights has intelligently mapped the attributes to the Common Data Model types.
6. Set **contactid** as the Primary Key



7. Click **Save** on the top left

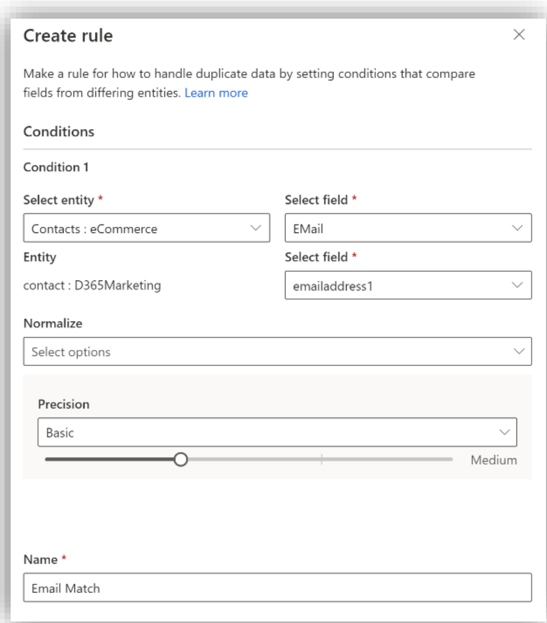
Match

1. Click the **Match** tab
2. Click **Edit** in the top right of the **Match records details** table
3. Click **+Add,** select **contact : D365Marketing**, check **Include all** and then click **Done**



4. Click +**Add rule** under **D365Marketing : contact** or the **+** to the right of it and select the following opitons:

   - Select entity: **Contacts : eCommerce**
   - Select field: **Email**
   - Select entity: **Contact : D365**
   - Select field: **emailaddress1**
   - Normalize: **<blank>**
   - Precision: **Basic - Medium**
   - Rule Name: **Email Match**



5. Click **Done**
6. Click **Save** and then **Run**

Merge

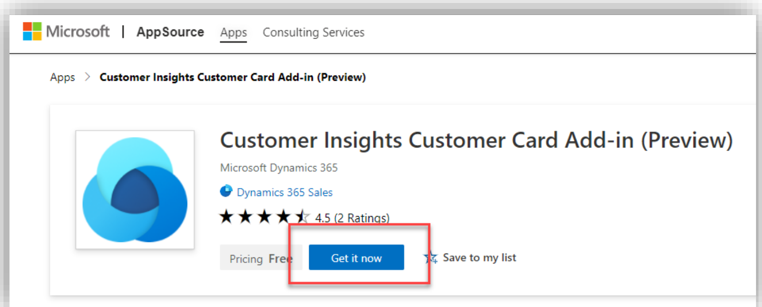
1. Wait for the Matching to complete and then click on the **Merge** tab
2. You should see that contactid from D365Marketing has been added to the list of Keys (Keys tab) that will make up the Unified Profile.
3. You can **optionally** add any attributes which have all been excluded and identify them as 'Merge' attributes where an attribute already exists (e.g. First Name, Last Name, Full Name, Gender and gerndercode_display).
4. Click **Save** and then **Run -> Run merge and downstream processses**

Exercise 2 – Embed Customer Insights into Dynamics 365

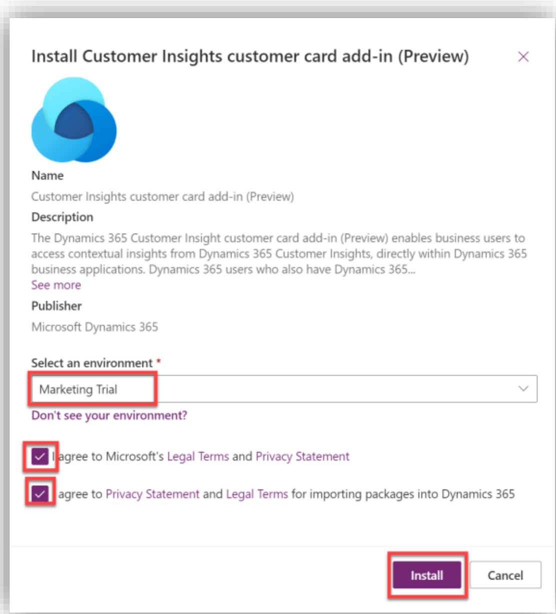
Task 1 – Install the Customer Insights Customer Card Add-in

The first step is to install the Customer Insights Customer Card Add-In, that will enable you to embed Unified Profile and Insight from Customer Insight, directly within an existing Dynamics 365 experience for Contoso Coffee Customer Service Advisors.

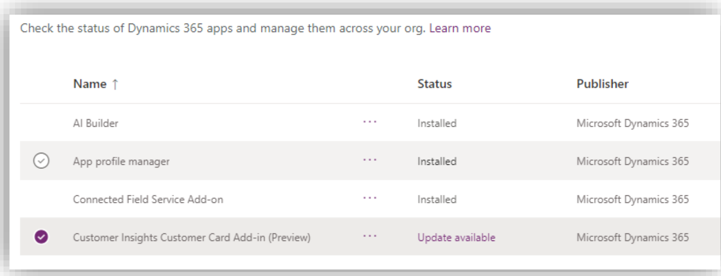
1. Go to AppSource to download the add-in: https://aka.ms/CICustomerCard
2. Click **Get it now** and then **Get it now** again



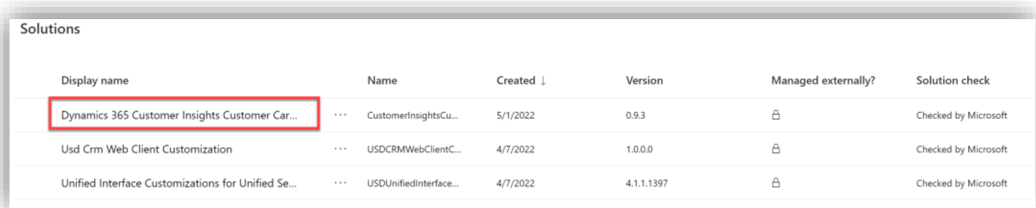
3. Select your D365 Marketing Trial environment from the dropdown, agreee to the terms and click the **Install** button.



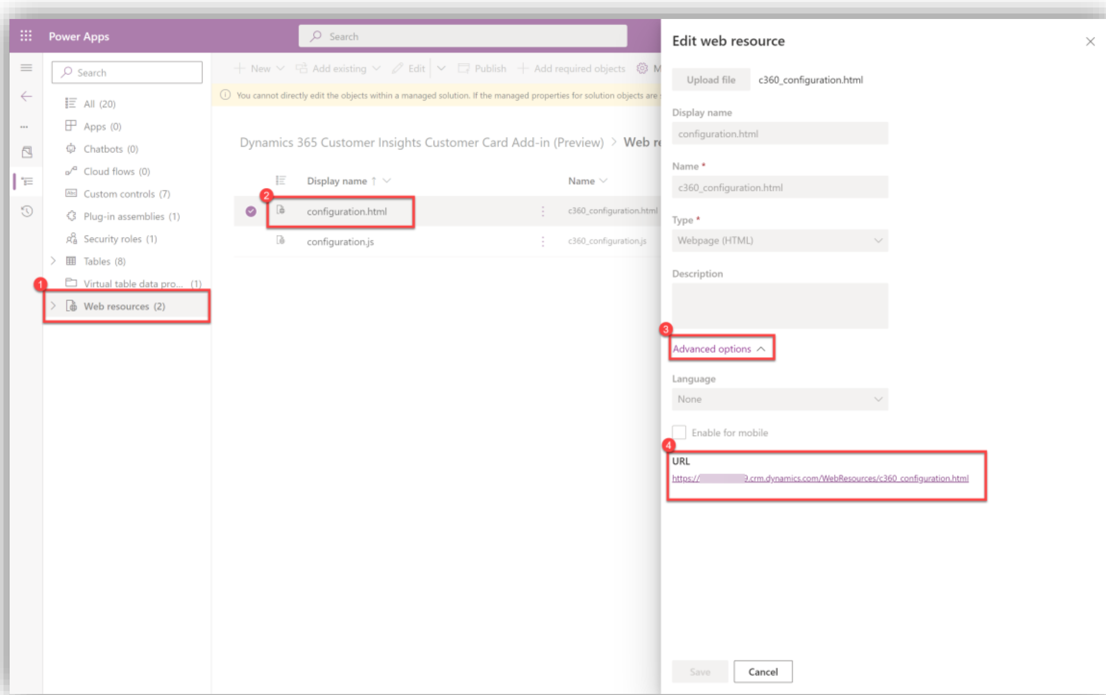
4. This will begin the installation process. You can check the status of the install on the page that opens. (You may need to refresh it for updates). If you see **Update available** in the status column click that text, then check the box and click the **Update** button.



5. Once installation is complete, go to https://make.powerapps.com -> **Solutions**. Click **Dynamics 365 Customer Insights Customer Card Add-In** (Make sure you are in the Marketing Trial environment)

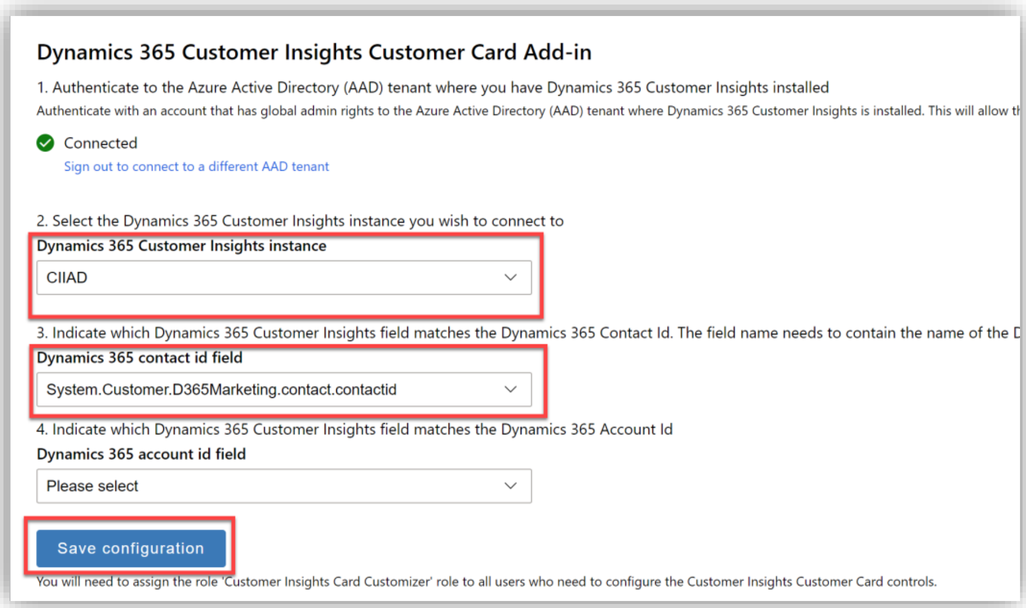


6. Click **Web resources -> configuration.html** -> **Advanced options -> URL link**



7. Click **Login with your org credentials** (If pop-up is blocked, allow it in the address bar and try again – if you get an error after doing this, close the page and launch again from the URL link).

8. Select your Customer Insights Envrionment via the drop-down and for **contact id** select the attribute from your customer profile that represents the Dynamics 365 Contact Id. (**System.Customer.D365Marketing.Contacts.contactid**).



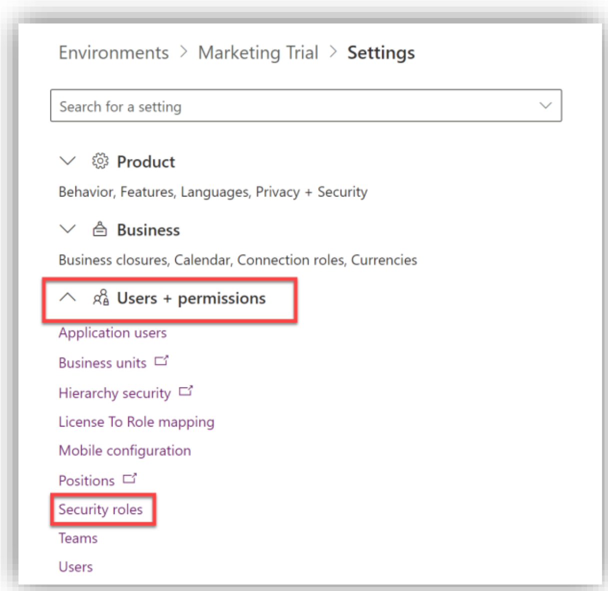
Note: There is also a field for **Dynamics 365 account id field** which we are not using, you may leave this as "please select".

9. Click **Save Configuration** (you can close the tab/window)

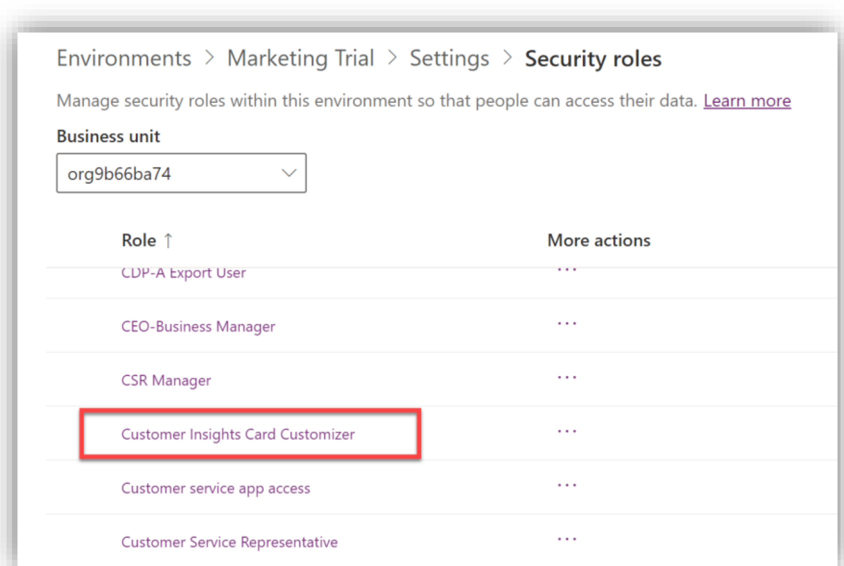
Task 2 – Add Security Roles

For users to configure the Customer Insights content embedded within the Dynamics 365 form, you will need to assign them the appropriate Security Role: **Customer Insights Customizer**

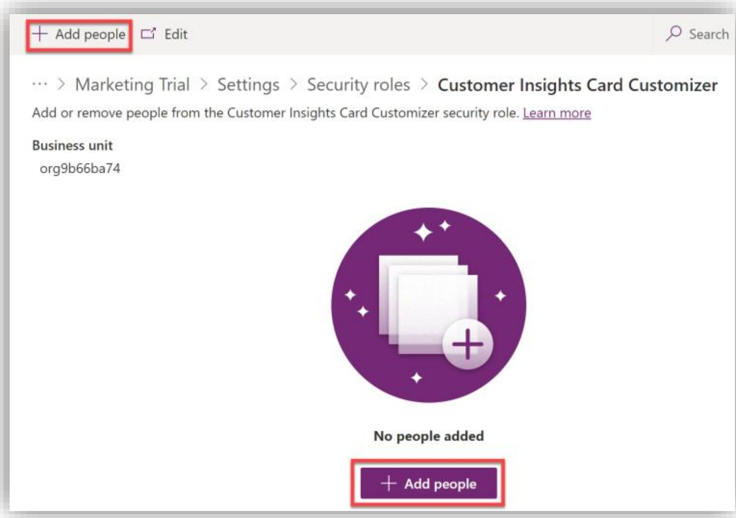
1. Go to the Power Platform Admin Center, https://aka.ms/ppac, **-> Environments -> Marketing Trial -> Settings**
2. Click **Users + permissions** and then **Security roles**



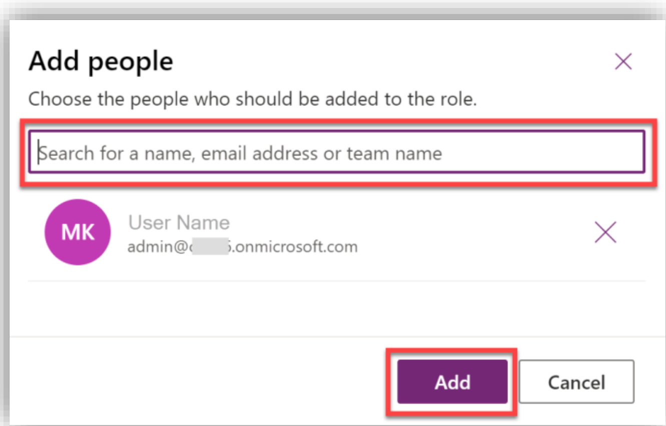
3. Click **Customer Insights Card Customizer**



4. Click **+Add people**



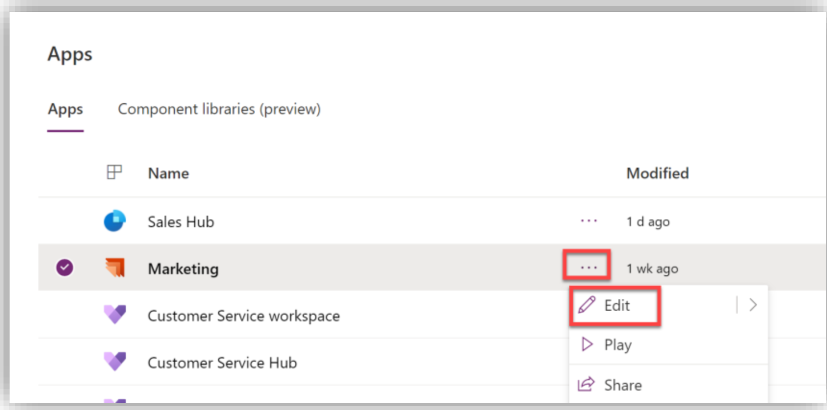
5. **Search for** and then **select your user account** (and any others that you wish to be able to view or edit Customer Insights Cards). Click **Add**



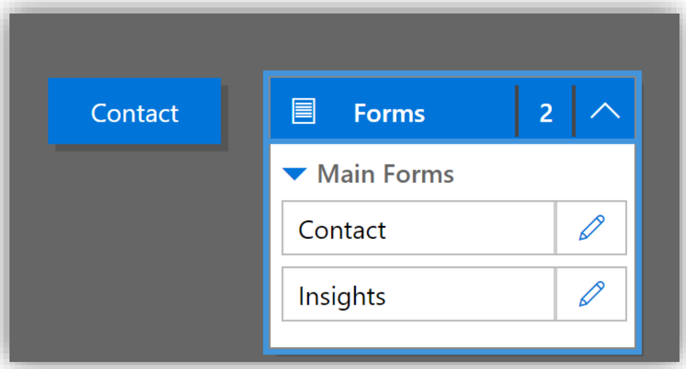
Task 3 – Add the Customer Insights Customer Card Controls to the Contact Form

Now you'll configure a Dynamics 365 Marketing Contact form, used by Contoso Coffee Marketers to embed details from Customer Insights.

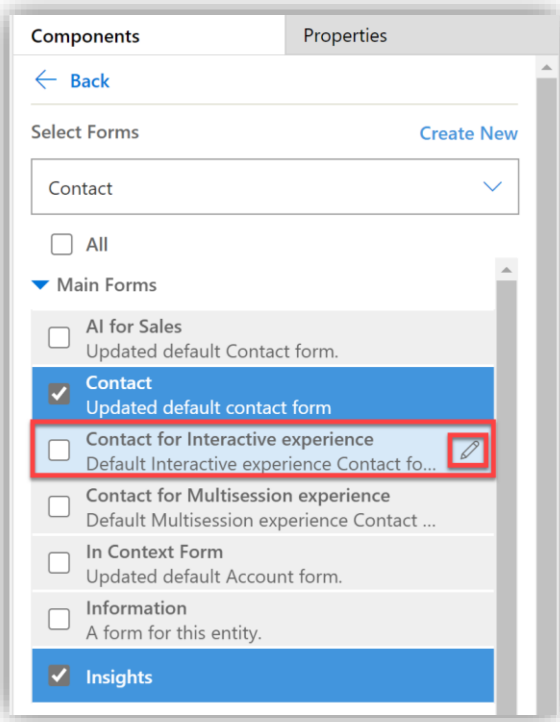
1. Navigate to https://make.powerapps.com/ and select **Marketing Trial** environment from the Environment drop down (top right)
2. Click **Apps** on the left menu.
3. Click the **More Commands '…'** button for the **Marketing** app and click **Edit.**



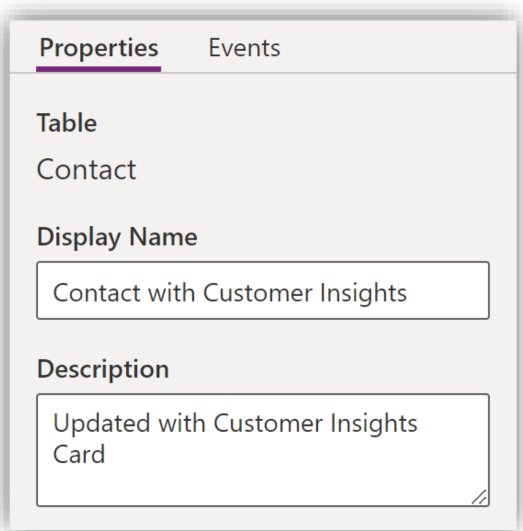
4. In the PowerApps App Designer, scroll down and expand the **Forms** menu for the **Contact** entity.



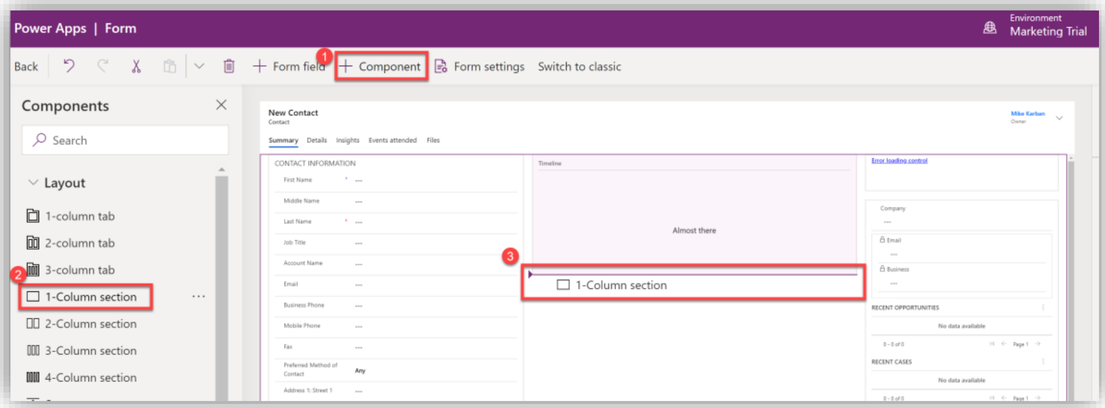
5. Under **Components : Main Forms** on the right, hover over **Contact for Interactive experience** and then click the **edit button (pencil)**.



6. Change the Display Name to **Contact with Customer Insights**. Then click **Save**.

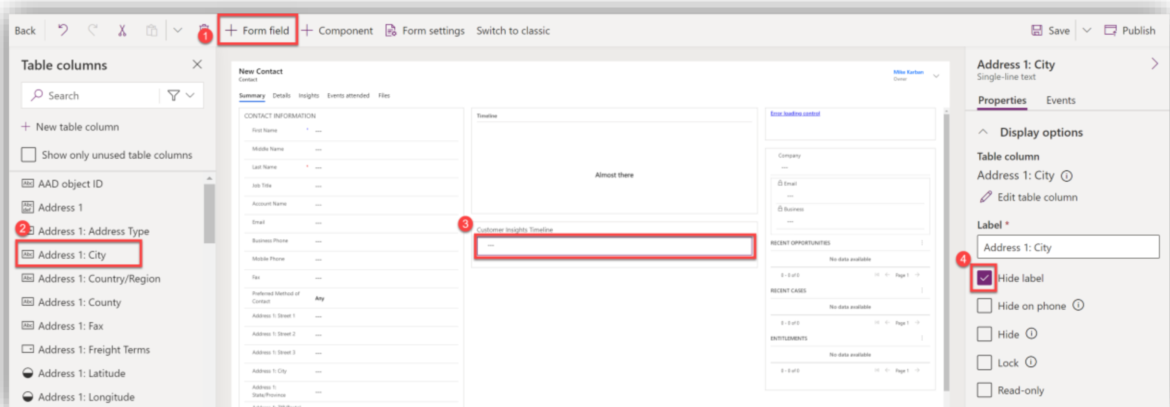


7. Add a section that will be used to display Customer Insights Timelin data. Click **+Component** to open the the Components menu on the left. Drag **1-One Column Section** to just under timeline (It is a little tricky to get it in the right spot, but the Timeline section should be highlighted with a small arrow and thick line under it when in the correct spot)



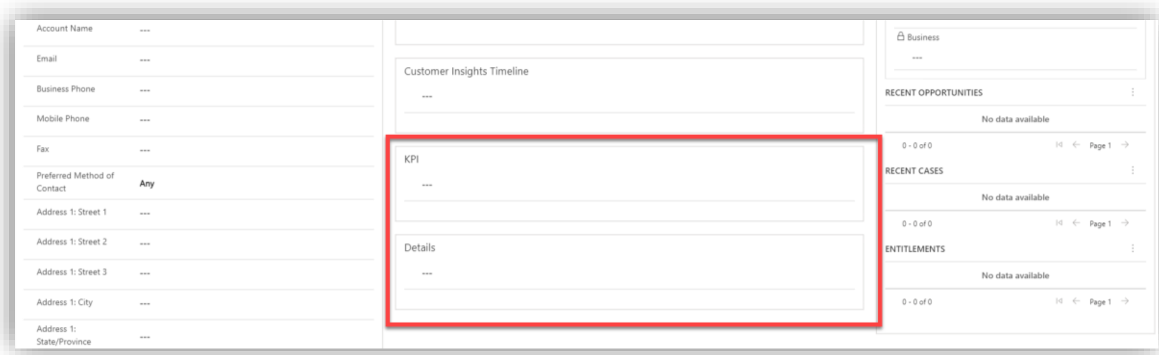
8. Put **Customer Insights Timeline** as the Label in the right hand properties pane.

9. Click **+Form field**, uncheck **Show only unused table columns** and then drag **Address 1 : City** to the **Customer Insights Timeline** section. Click **Hide label** (The *Adress 1 : City* field is being used in order to activate field property controls in later steps. You won't be displaying the City)

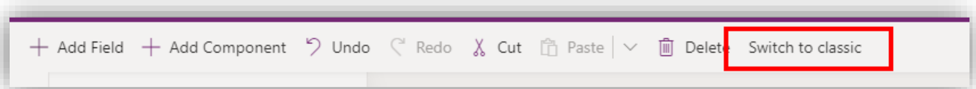


Repeat steps 7, 8 and 9 to create the following sections. Put both sections under the Customer Insights Timeline section:

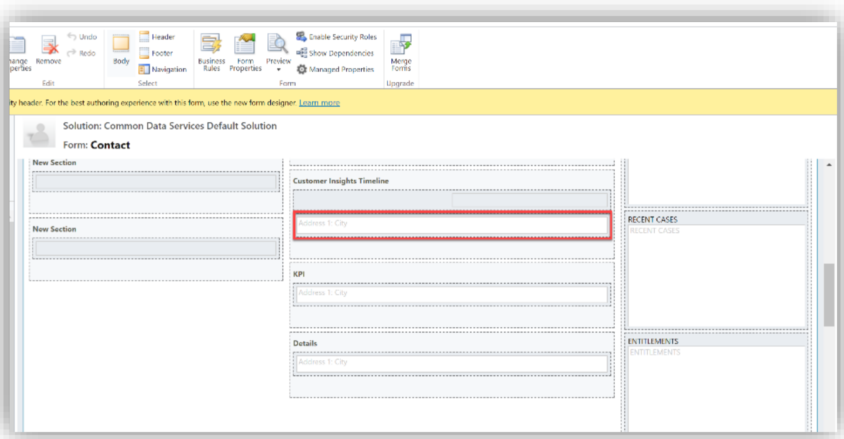
- **KPI**
- **Details**

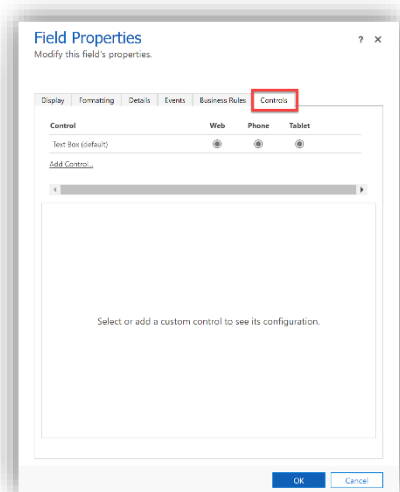


10. Click **Save** in the top right. After save is complete, click **Switch to Classic**

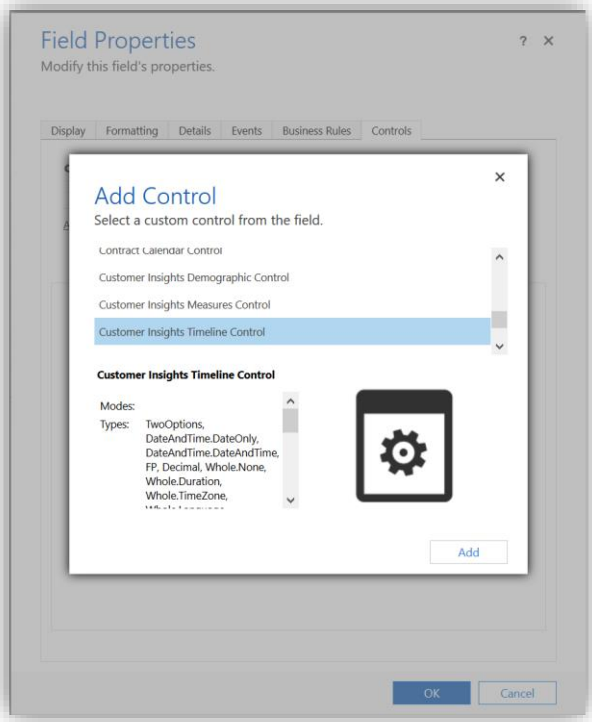


11. Double Click the Address 1 : City field in the **Customer Insights Timeline** section and click on the **Controls** tab

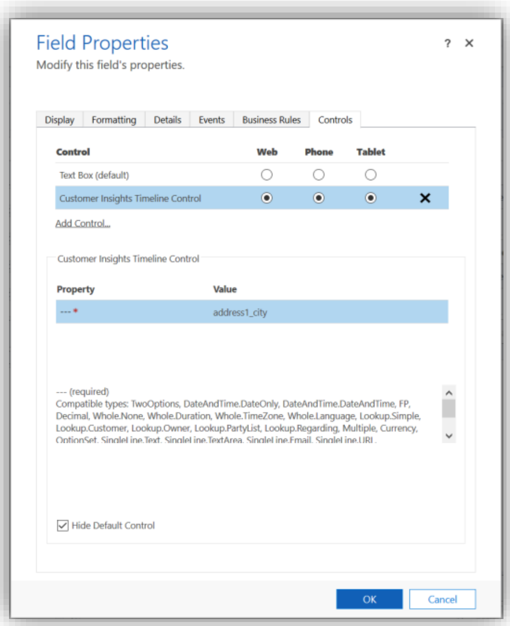




12. Click **Add Control…** Scroll down the list to choose **Customer Insights Timeline Control** then click **Add**



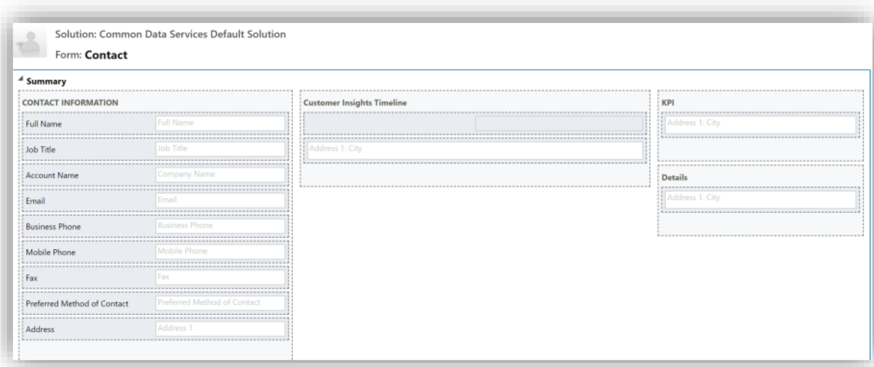
13. Set the control to appear on **Web, Phone** and **Tablet,**check the **Hide Default Control** checkbox and click **Ok**



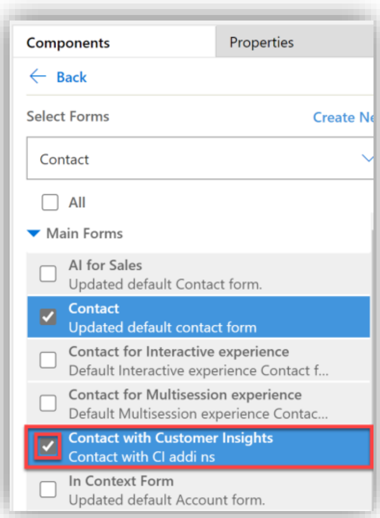
14. Repeat steps **11, 12 and 12** for the Address 1: City fields in the **KPI** and **Details** sections. Add the **Customer Insights Measure Control** to **KPI** section and the **Customer Insights Customer Details Control** to the **Details** section.

15. There were limitions on where the new sections were added earlier, so now they need to moved to a more user friendly area. Also, sections not needed in this form will be removed. Click on the **TIMELINE** section and then click Remove from the toolbar or click delete key. Click **OK** to confirm.

16. Drag and drop the **KPI** section to above the **RELATED** section. Drag and drop the **Details** section to below **KPI**. Remove/delete the **RELATED** section. It should look like below when done. Click **Save and Close**



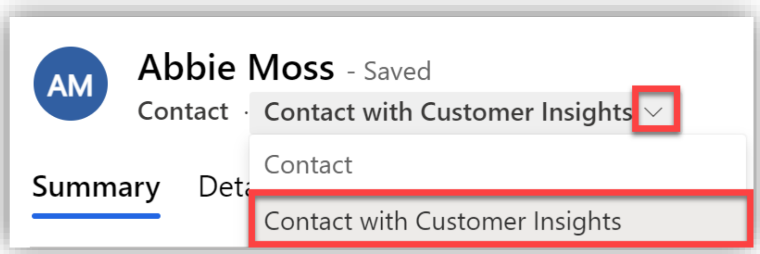
17. Refresh the **App Designer** page/tab so that the form you just updated/renamed is displayed. Scroll down to **Contact** and expand **Forms** Check the checkbox for the **Contact with Customer Insights** form you just created under **Components -> Main Forms**



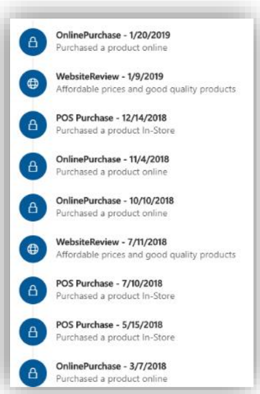
18. Click **Save** in the top right hand corner and then **Publish.**

Task 4 – Confirm the Changes in the Model Driven App

1. Now open your **Dynamics 365 Marketing** instance
2. Navigate to the **Contacts** via the left hand menu. **Contacts** is under **Customer** in the **Outbound marketing** area. If you don't see it, switch the area to Outbound Marketing on the bottom left corner. Open the Contact record for **Abbie Moss** and select your new **Customer Insights** form using the form selector.



3. You should now see that the three Customer Insights you embedded in the form render. KPI and Details control's can be configured. You may need to edit the cards to select the correct fields to show.

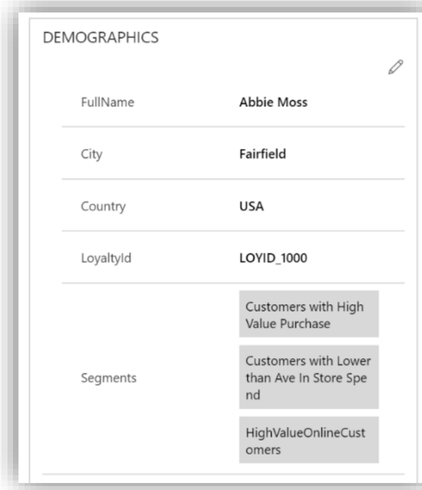


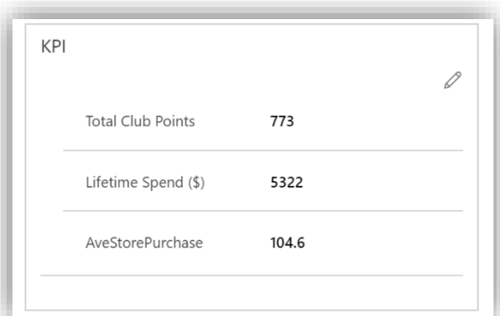
Timeline:
No configuration required. This should display a unified set of ingested activities from Customer Insights.

Details

The demographic control should display some key information from the Unfiied Customer Profile. Click the **Edit** button to customize the information that appears.

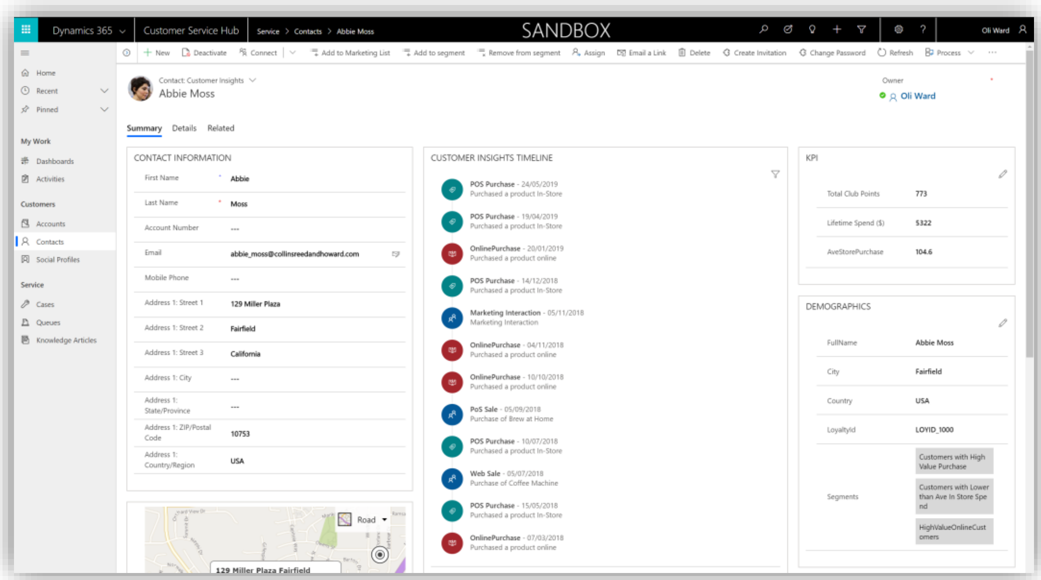
Turn on the **Segments**. Add any additional fields that you believe may be helpful





KPIs

Click **Edit** on the KPI controls. Here you are able to select from any of the Customer Measures that you created earlier. Add your Customer Measures to give the Contoso Coffee CSA visibility. (**Total Club Points, Lifetime Spend ($)** and **Average Store Purchase ($)**



Your final Contact form should appear similar to that above.

Congratulations! You have successfully completed the objectives of this module, providing Contoso Coffee Customer Advisors with visibility of all customer touchpoints & KPIs.

Exercise 3 – Extending the Value of Customer Insights with Dynamics 365 Marketing Emails and Journeys

Customer Insights has direct integration with Dynamics 365 Marketing for setting up customer segments to use with customer journeys. There are three steps to the process.

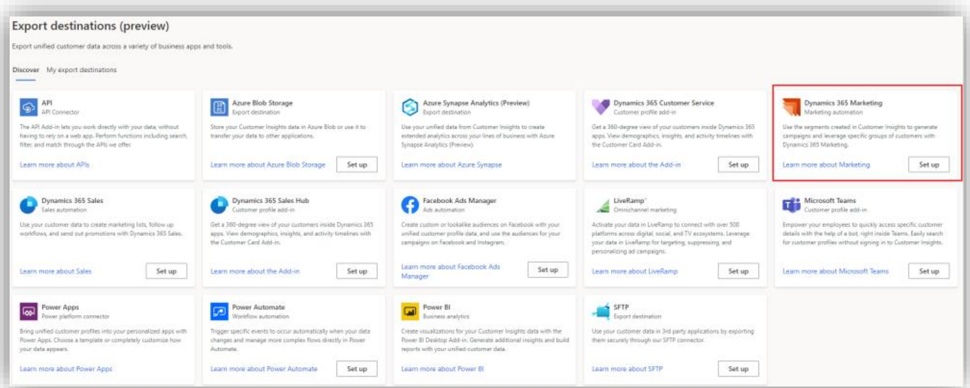
- Configure an Export Destination in Customer Insights
- Export the segments to Dynamics 365 Marketing
- Create a Customer Journey in Marketing from the Segment(s)

Task 1- Configure a Connection to Marketing

1. Navigate to https://home.ci.ai.dynamics.com

2. Log in with your administrator account

3. Click on **Admin -> Connections** in the left-hand menu. Here you will find various connections that are available in Customer Insights. Click **Set up** on **Dynamics 365 Marketing (Outbound).**



4. You will be presented with a dialog to configure your export destination connection to **Dynamics365 Marketing**.

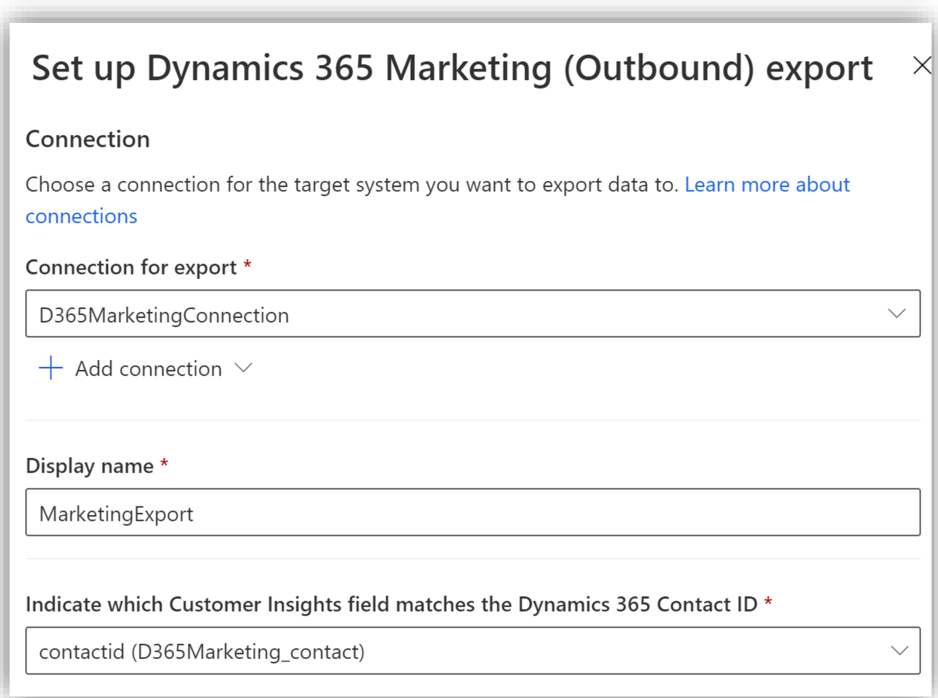
5. Enter a display name, select **Administrators** for who can use the connection and then enter your Marketing instance address and sign in with your account.

6. Finally check the **privacy and compliance** agreement box and then click **Save**

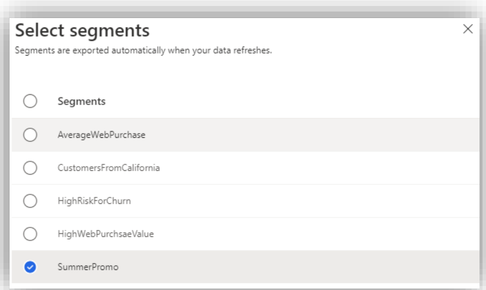
Task 2- Configure an Export to Marketing

You just created a connection to your Dynamics Marketing instance for use within CI. The next step is to use this connection to create an export of your segment(s).

1. Click on **Data -> Exports** in the left-hand menu
2. Click **Create export**
3. Select your newly created connection to marketing from the dropdown.
4. Enter a display name
5. Next you indicate which Customer Insights field matches your Dynamics Contact ID. This is important as it provides the link between the Customer Insights customer and the Dynamics Contact. This will be something like “contactid (D365Marketing_contact)” where D365Marketing is whatever you called your data source when you ingested the contacts from Dynamics Marketing into CI. Your finished dialog will look something like this:



6. You can now choose which Segments you want to export. We will add one Segment here and in the next Task we'll see how to add new segments to an existing export. Click the **SummerPromotion** segment and click **Save**.



NOTE: If you get an error when saving follow these steps and then try to create the export again

1. Go to portal.azure.com – you need to login as tenant admin
2. Search for **Enterprise Applications**
3. Click on **All Applications** in the left menu
4. Search for **Customer Insights Dynamics 365 For Sales Export**
5. Click on **Permissions** on the left menu
6. Click on the **Grant admin consent for Microsoft**

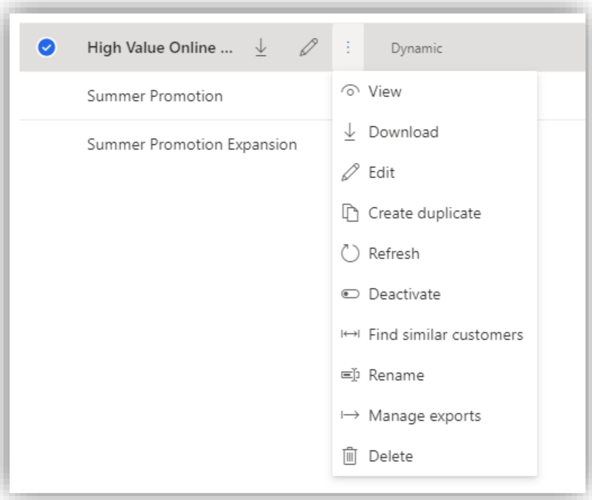
7. Export the segment by selecting the option to the left of the export name and then click ->**Run** . Or select the 3 dots next to the name and click **Run.** You could also just click Run All (when no exports are selected) to export all.

Task 3 – Adding a Segment to an Existing Export Destination

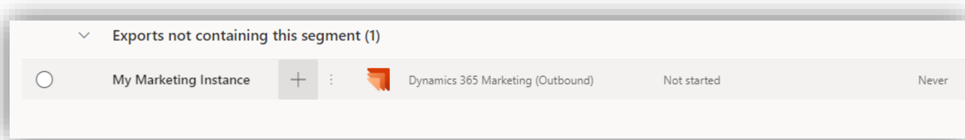
Once you have configured an export destination, there is an easy way to add segments to your existing export. Add the **High Value Online Customers** segment to the export we just created.

1. Click **Segments** in the left-hand menu

2. Click the vertical ellipse next to the **HighValueOnlineCustomer** segment. Then click **Manage Exports**



3. On the **Exports (preview) for segment** page you will see that your export is listed under the **Exports not containing this segment** category. Simply click the "+" sign next to the export name to add it to the export.



4. Click **Run** in the top menu bar

Task 4 – Using the Segment to Orchestrate a Customer Journey

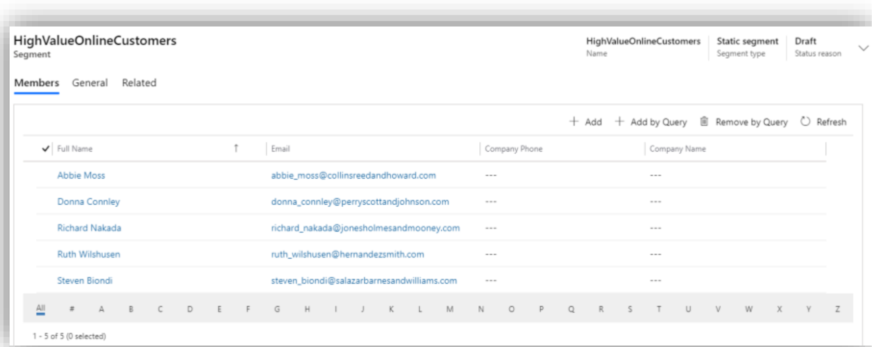
You are now ready to consume the segments which Customer Insights has exported to our Dynamics 365 Marketing instance. For this example, we are going to create a **New** journey based on our **High Value Online Customers** segment. This journey will be one that sends out our Monthly Newsletter to our High Value Customers.

Review the Segments

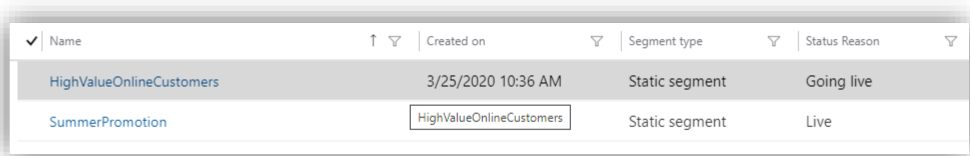
1. Go to the Dynamics 365 Marketing app

2. Click on **Segments** in the left-hand menu, in the **Customers** section (if you don't see it, change the area in the bottom to Outbound marketing)

3. Click on the **HighValueOnlineCustomers** segment to open it. You will notice that it lists the contacts who are members of this segment.

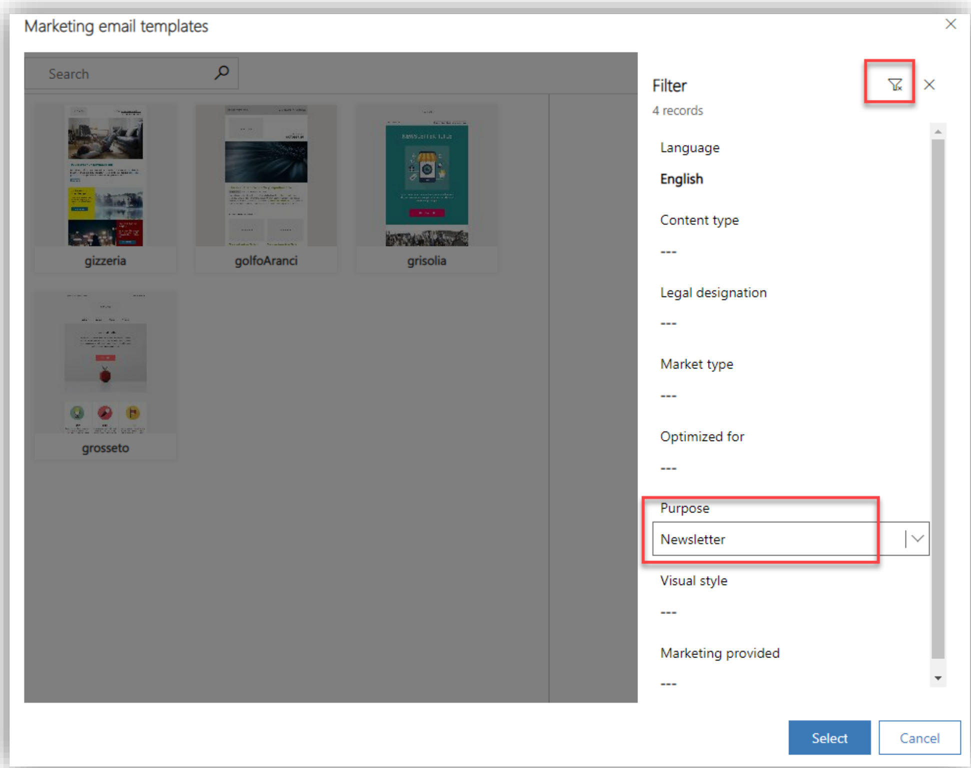


4. To use the Segment in a marketing journey you must first mark it as 'Live'. Click the **Go Live** button in the top menu bar to accomplish this. Once the status for the segment is changed to **Live** you can continue.

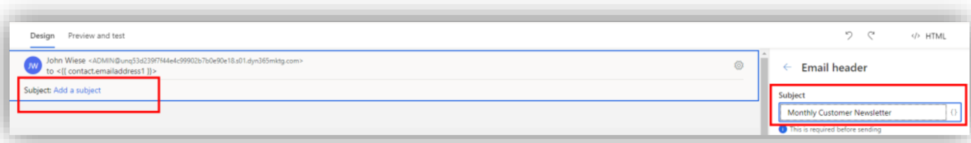


Create the Newsletter Email

1. Click on **Marketing emails** in the left-hand menu
2. Click **New** in the top menu bar
3. In the template selection pop-up click on **Filter**, then in the **Purpose** filter it to **Newsletter** and then select any of the newsletter options and click on **Select**



4. You are welcome to customize anything in the newsletter you'd like, but for this lab we really don't need to customize anything.
5. Let's give this email a subject, **Monthly Customer Newsletter**



6. Our email needs a name. Click on the top left where you see the name of the template you chose and enter the name **High Value Monthly Newsletter** in the field.

7. We are now done with our email. The final thing we need to do is **Save** it and then click the **Go Live** button in the upper right hand corner.

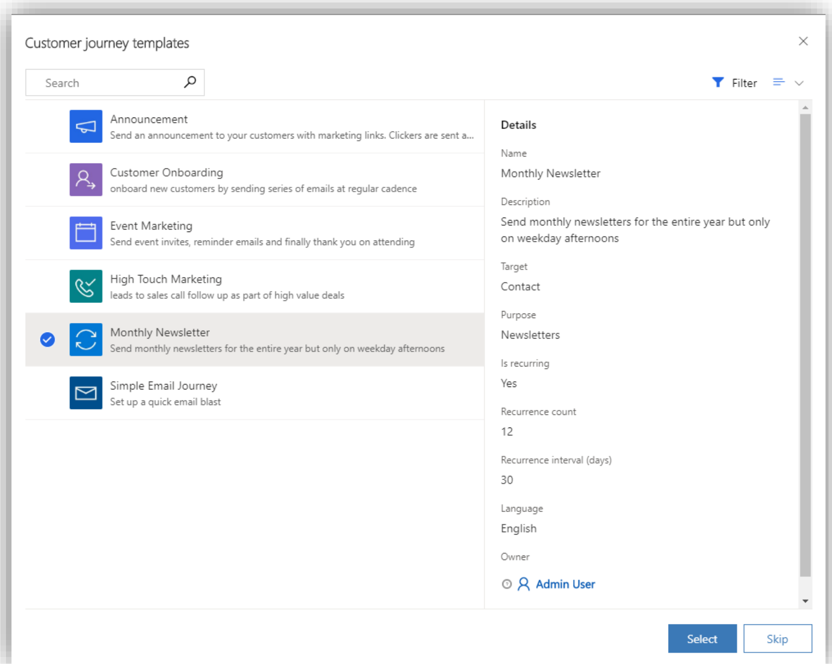
8. Before moving on we will wait for the email to go live. Click on **Marketing emails** in the left-hand menu and wait for the email to switch from "Go live" to "Live". (You may need to click the **Refresh** button to see it update. It can take a few minutes)

Create the Customer Journey

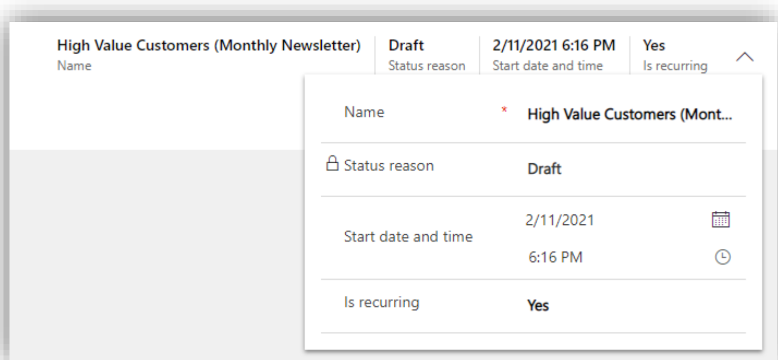
1. Click on **Customer journeys** in the left-hand menu

2. Click on **New** in the top menu

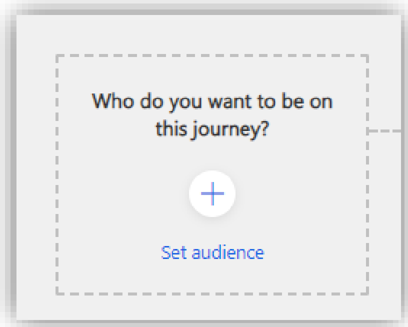
3. Click on the **Monthly Newsletter** template. We'll use the defaults of sending every 30 days for 12 months so just click **Select.**



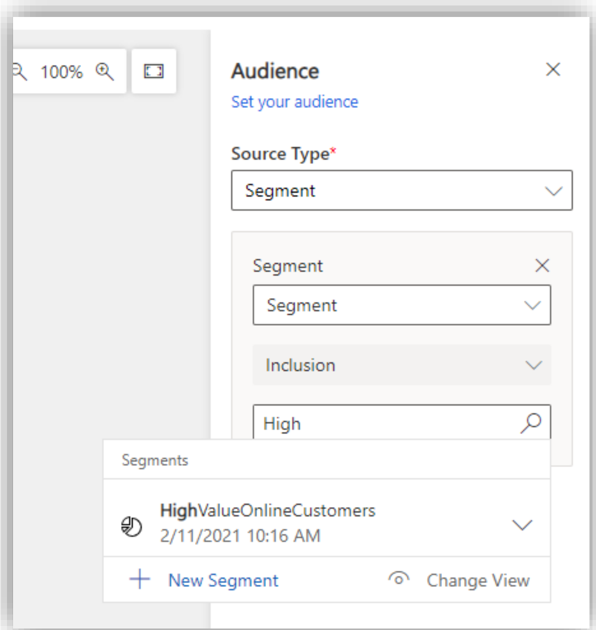
4. First let's name our Journey by clicking on the dropdown in the top right and setting the Name field to **High Value Customers (Monthly Newsletter)**. Also change Is Recuring to **Yes.**



5. Next, we will tell the system which segment we want to use. Click the **Set audience** link.

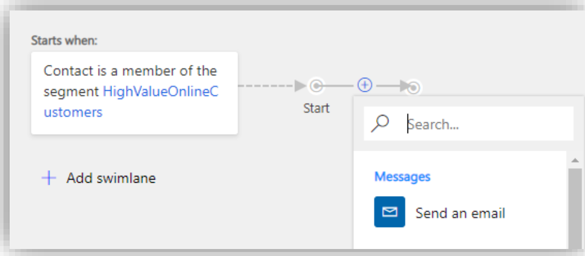


6. In the Audience pop-out that opens type **High** in the segment lookup box and select the **HighValueOnlineCustomers** segment from the list.

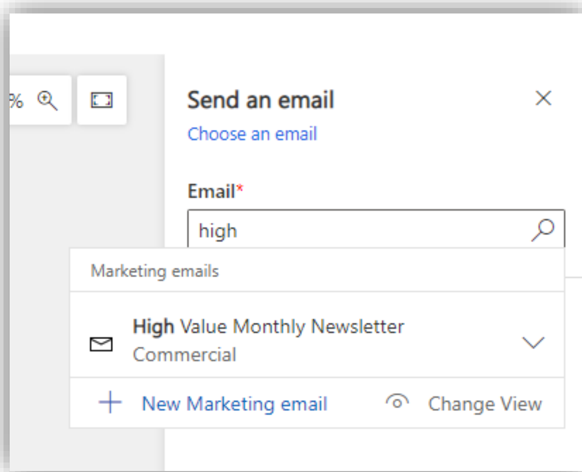


7. Click **Save** in the top menu

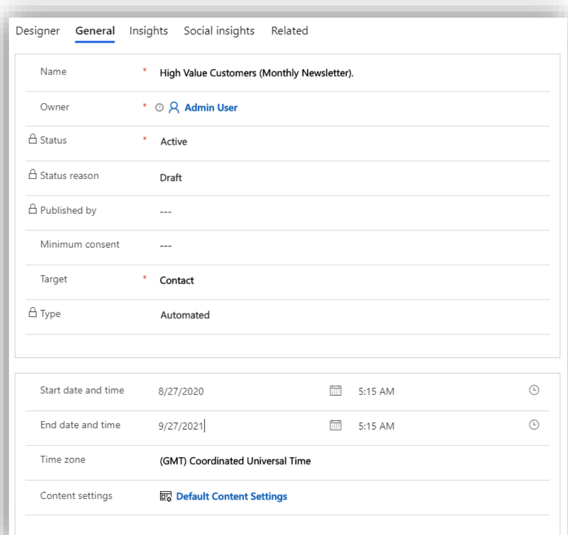
8. Next, we need to configure the email. Click on the **+**sign between the Start and End indicator and click the **Send and email** option



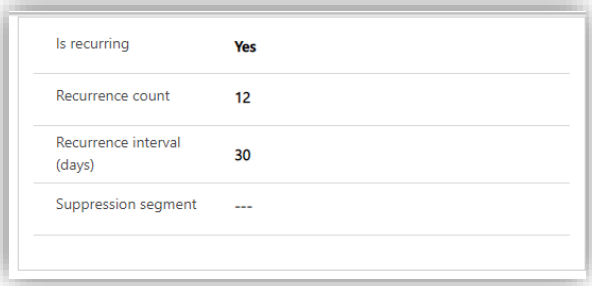
9. In the **Send an email** pop-out type in **High** and select the **High Value Monthly Newsletter** email we created previously.



10. The final step before we can publish our journey is to set the timeframe. Click on the **General** tab and set the **End date and time** to be just over 1 year from today.



11. We also need to set the recurrence count to 12 and interval to 30.



12. Click **Save** and then go back to **Designer** tab and hit **Go live** in the top menu.

You are done! You have just created a Customer Journey in Dynamics 365 Marketing based on a Segment of customers which you brought in from Dynamics 365 Customer Insights.