Microsoft Dynamics 365

Customer Insights

Module 06

Extend the Solution with Power Platform

Module Overview

In this module you will learn the following:

- **How to use the Customer Insights connector to “Adapt and Extend” your solution**
- Connect to Power BI
- Connect to Power Automate
- Connect to Power Apps
- Connect to Azure Logic Apps
- Connect via APIs to other applications

6.1 Extend the Solution with Power Platform

Power Platform:

Create Power BI dashboards to analyze Customer Insights data

Create Power Automate flows triggered by changes in customer data

Create apps in Power Apps to view profiles, capture activity, and make recommendations

Azure Logic Apps

Create serverless apps to connect to Customer Insights

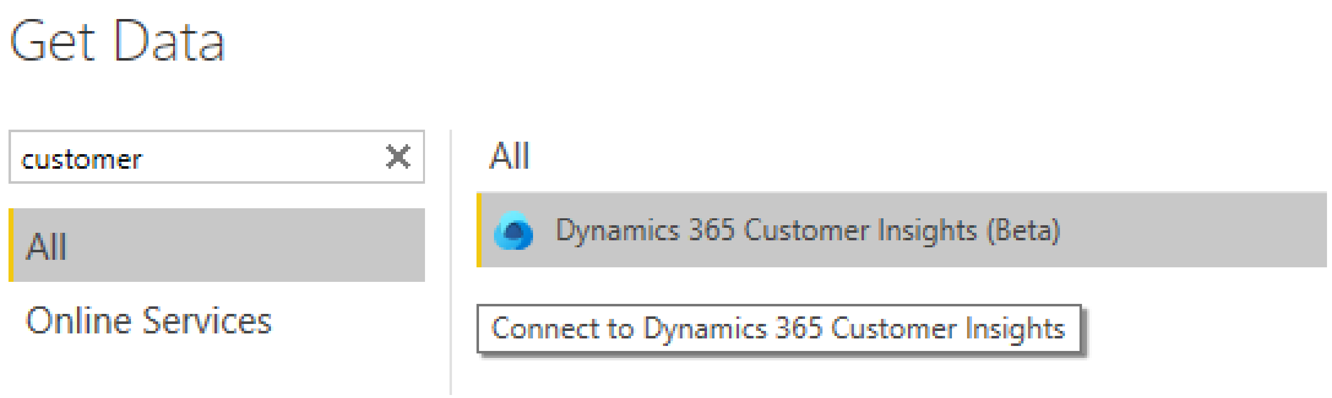
Develop with Customer Insights APIs

Develop against the REST APIs exposed by Customer Insights

Connect Power BI to Customer Insights

To create dashboards in Power BI from Customer Insights data, you need:

- ✓ Power BI Desktop
- ✓ Unified customer profiles in Customer Insights



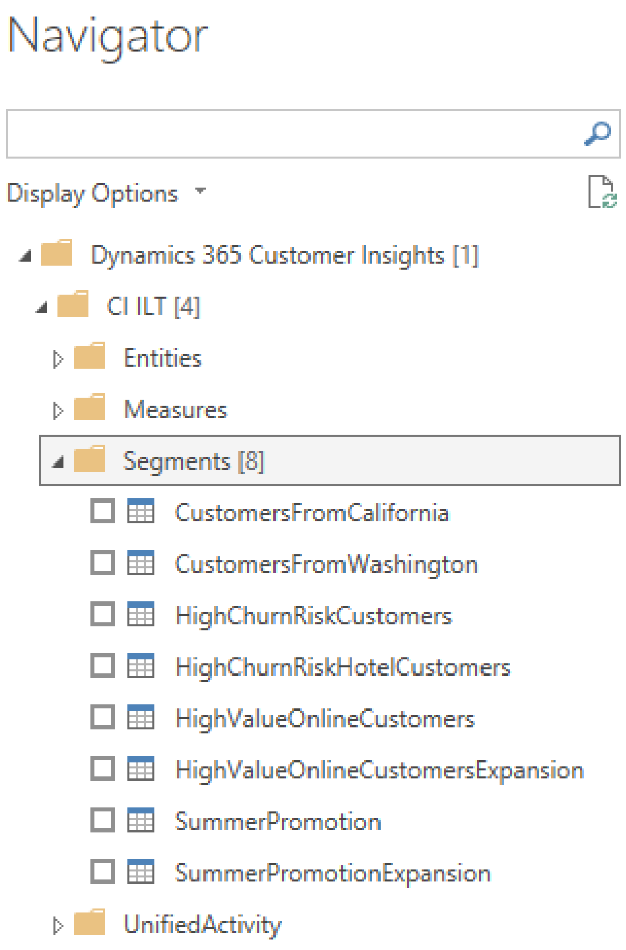
The Customer Insights connector for Power BI is designed to work for data sets that contain up to 1 million customer profiles. Consider using segments for large datasets

Importing larger data sets may work, but it takes a long time. For more information, see [Power BI: Recommendations for large data sets].

Working with Customer Insights in Power BI

Using Power BI Desktop, use the Get Data menu or ribbon item

- ✓ Search for the Customer Insights connector
- ✓ Connect to your environment
- ✓ Use the Navigator to browse entities, segments, and measures
- ✓ Select the items you wish to visualize, and Load/Transform
- ✓ Work with the data like any other source



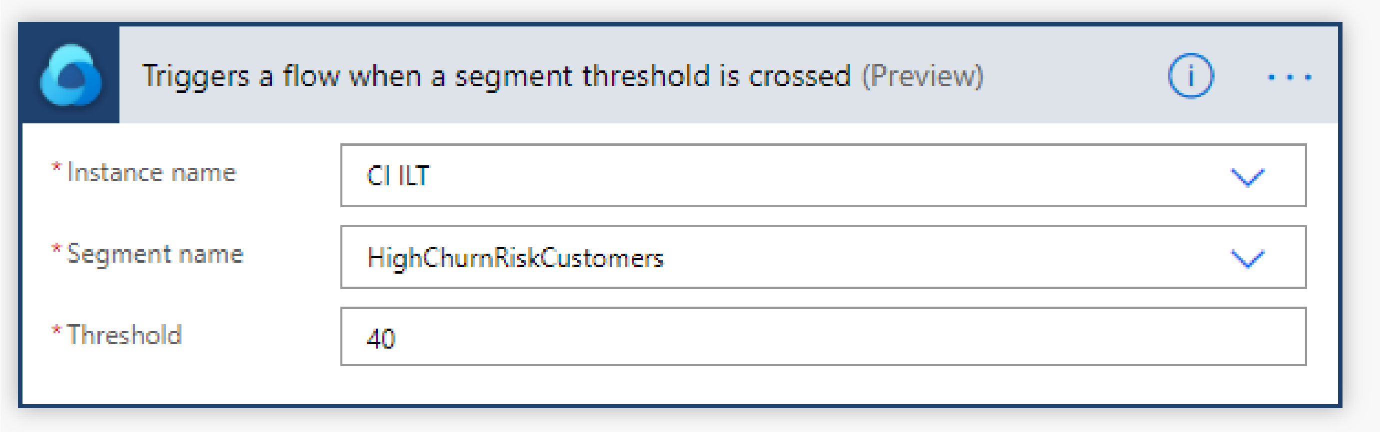
Create Power Automate Flows for Customer Insights

Connecting Customer Insights to Power Automate allows you to trigger specific workflow events to occur automatically when your data changes

You can manage more complex flows directly in Power Automate.

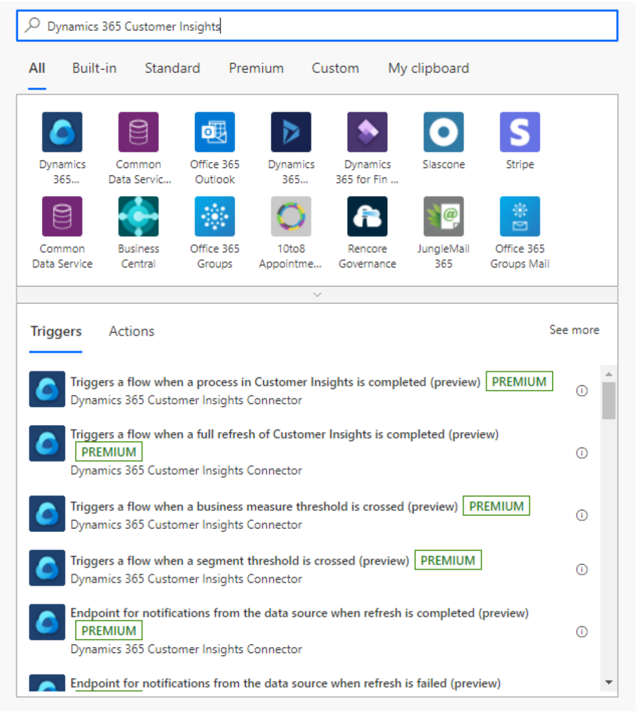
Trigger when:

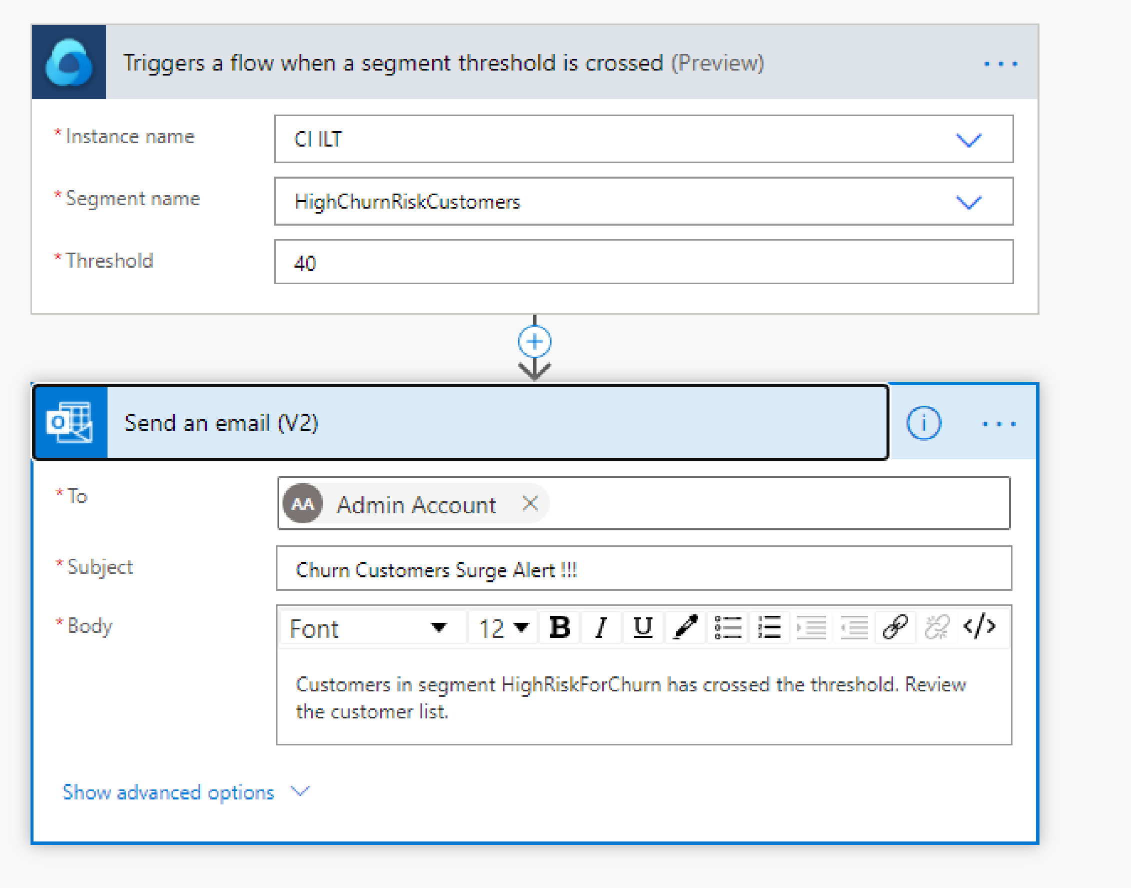
- ✓ a data source refresh fails.
- ✓ a data source refresh succeeds.
- ✓ a threshold is crossed on a segment. The trigger is limited to crossing above the threshold.
- ✓ a threshold is crossed on a business measure. The trigger is limited crossing above the threshold.
- ✓ a full refresh of Customer Insights (data sources, segments, measures,...) is completed.
- ✓ a refresh of the unification process (map, match, merge) is completed.



Working with Customer Insights in Power Automate

- ✓ Create a Flow
- ✓ Connect to Customer Insights
- ✓ Select a Trigger
- ✓ Select an Action
- ✓ Set properties





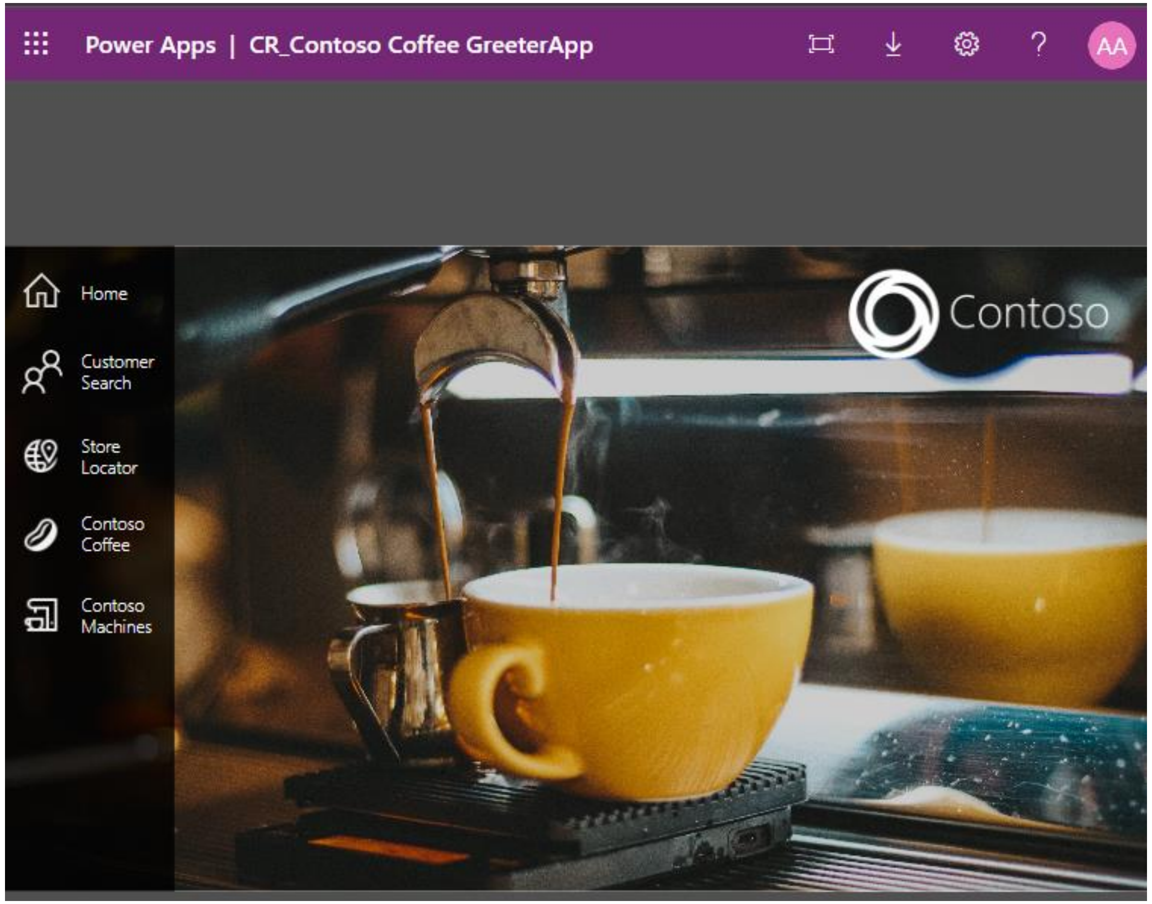
Create Power Apps for Customer Insights

Customer Insights is one many available sources for data in Power Apps.

Power Apps can use the following entities from Customer Insights:

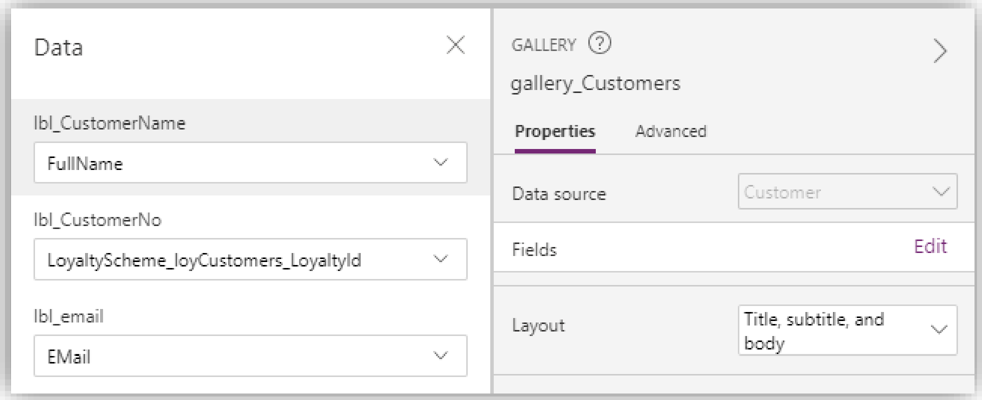
- **Customer:** to use data from the unified customer profile.
- **Unified Customer Activity:** to display the activity timeline on the app.
- **Segments:** to limit the amount of records returned

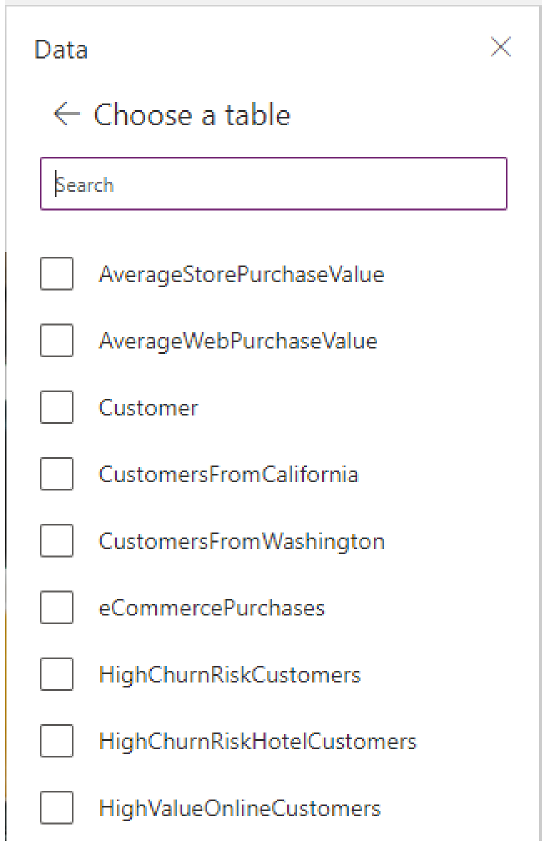
There are some limitations imposed by Power Apps for large datasets. Delegation by Power Apps to Customer Insights requires some additional configuration in your solution. See docs for more information.

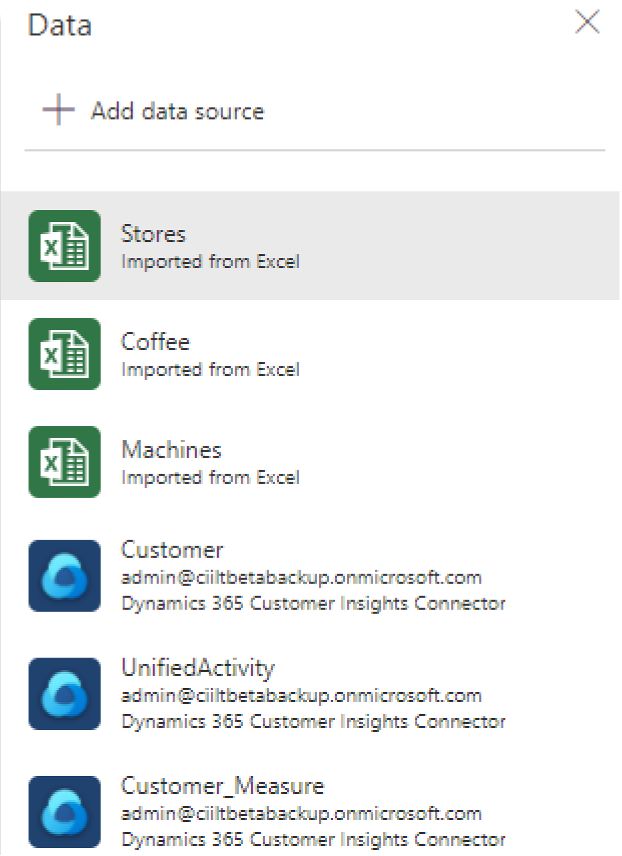


Working with Customer Insights in Power Apps

- ✓ Create a data source connection with your Customer Insights instance
- ✓ Select entities (tables)
- ✓ Reference entities in properties and expressions in app







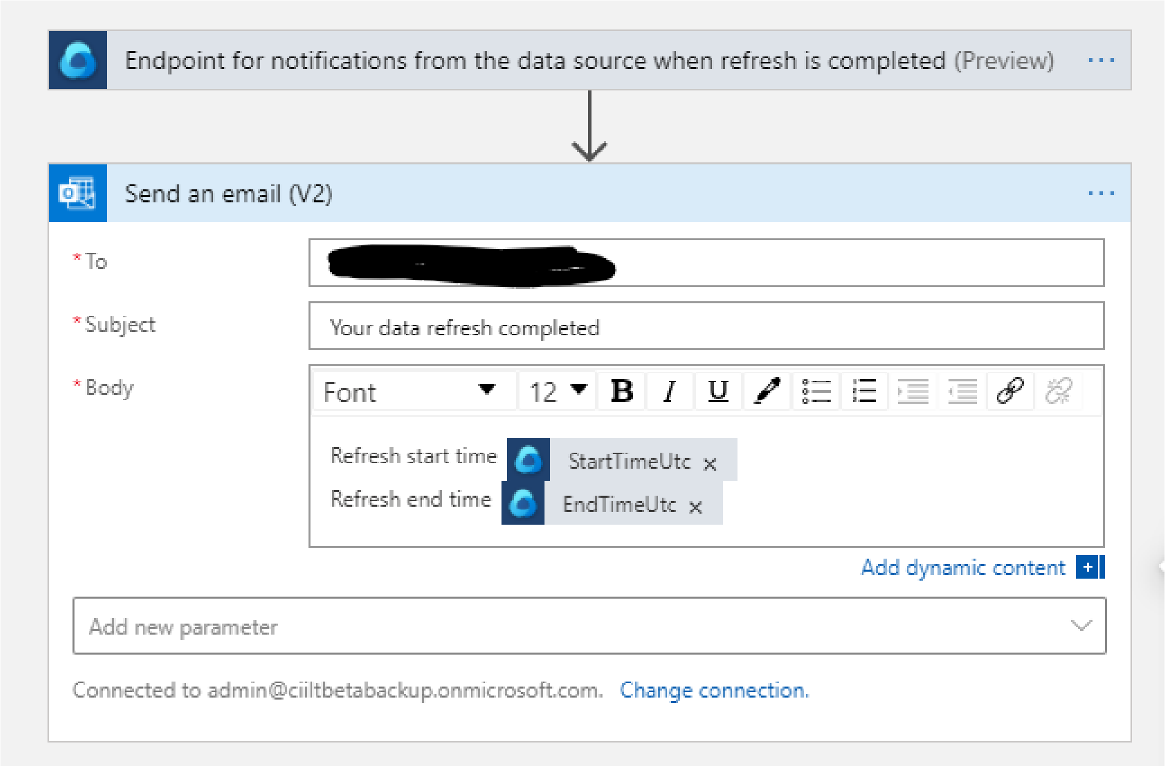
Create Azure Logic Apps for Customer Insights

What are Azure Logic Apps?

A cloud service that helps you automate tasks, business processes, and workflows to integrate apps, data, systems, and services across organizations.

Hundreds of connectors available for many services, including Customer Insights, Office 365, SalesForce

Define a trigger, such as data refresh completing, and assign workflow actions through a connector: send email, send status report, etc



Using Application Programming Interfaces for Customer Insights

The Dynamics 365 Customer Insights Connector provides a set of APIs to interact with Dynamics 365 Customer Insights instances.

You have already seen them used "under the hood" with Power Automate, Power Apps, and Logic Apps

They may also be called from custom code

APIs provide access to:

- ✓ Actions (create/get update)
- ✓ Sending status reports
- ✓ Triggers (refresh results, business thresholds crossed)
- ✓ Export, search, query data
- ✓ Conflation
- ✓ Data preparation
- ✓ Diagnostics
- ✓ And lots more

Browse the API calls at https://global.api.ci.ai.dynamics.com/swagger/index.html

Lab 6 Extend the Solution with Power Platform

In this lab, you will:

- **Connect Power BI to Customer Insights, and Visualize Customer Insights Data**
- **Create a Power Automate flow to configure ‘Customer store check in activity’ and to create personalized recommendations**
- **Create a PowerApps app that**
  - Connects with Customer Insights Unified Profile
  - Connects with the ‘Customer Check In’ Flow
  - Delivers Personalized recommendations
- **Explore the Customer Insights Swagger documentation**