

Module 05

Extend the Solution with Dynamics 365

6.2 Activating the Solution

Embedding Customer Insights into Dynamics 365 Apps

Creating a Customer Journey in Dynamics 365 Marketing with Customer Insights

Exporting Segments to Facebook Ad Manager

Embedding Customer Insights into Dynamics 365 Apps

Customer Insights data can be integrated into other Dynamics 365 Apps

The Customer Card Add-in allows you to view demographics, insights, and activity timelines in the apps

Overall process:

- ✓ Prepare your CI data
- ✓ Install the Customer Card Add-in
- ✓ Authorize users
- ✓ Customize forms in apps to display the Customer Card

DEMOGRAPHICS		
FullName	Abbie Moss	

KPI		
Total Club Points	773	
Lifetime Spend (\$)	5322	
AveStorePurchase	104.6	

Customer card options

- Demographic
- Timeline
- Measures

DEMOGRAPHICS

FullName

Abbie Moss

KPI

Total Club Points

773

Lifetime Spend (\$)

5322

AveStorePurchase

104.6



Preparing Customer Insights to use the Customer Card

- ✓ Ingest data into Customer Insights using CDS
- ✓ Configure search and filter in CI
- ✓ Create measures and map activities for the timeline
- ✓ Some features require demographic data, such as age and gender; enrichments, or intelligence options such as Prediction.

(See [Docs](#) for complete list of prerequisites)

Customer Card Add-in

Install the add-in from [AppSource](#):

 Microsoft | AppSource Apps ▾

Search Microsoft AppSource

Apps > **Customer Insights Customer Card Add-in (Preview)**



GET IT NOW

Pricing
Free

Products
Dynamics 365 Sales

Customer Insights Customer Card Add-in (Preview)

Microsoft Dynamics 365

★★★★★ 4.0 (1)

Overview Reviews

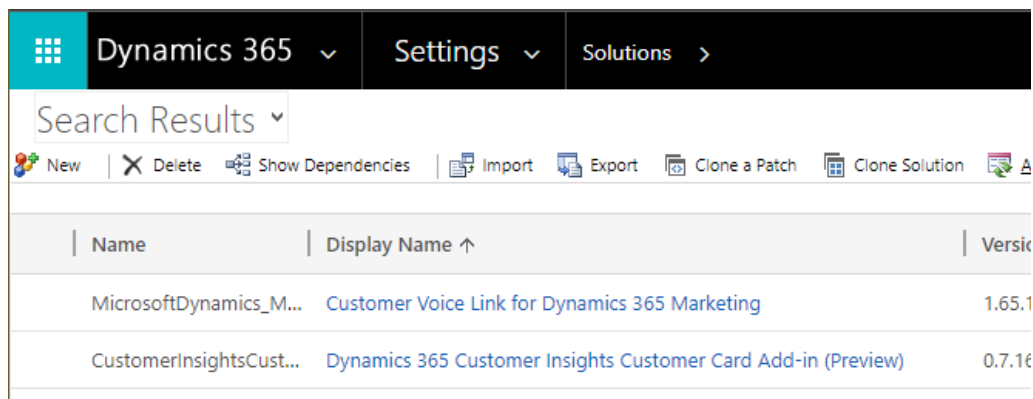
Surface unified customer data and insights within Dynamics 365 applications

The Dynamics 365 Customer Insight customer card add-in (Preview) enables business users to access contextual insights like customer journey and KPIs, from Dynamics 365 Customer Insights, directly within Dynamics 365 business applications. Dynamics 365 users who also have Dynamics 365 Customer Insights can easily install this app to light up



Configure the Customer Card Add-in

Configure the add-in from Dynamics 365 Settings>Solutions



Select Customer Insights instance
Map key field from Customer Insights
Set user permissions:
Settings>Security>Users
Customize form(s) to display card

Dynamics 365 Customer Insights Customer Card Add-in

1. Authenticate to the Azure Active Directory (AAD) tenant where you have Dynamics 365 Custom Insights. Authenticate with an account that has global admin rights to the Azure Active Directory (AAD) tenant where Dynamics 365 Customer Insights is installed to authenticate against Dynamics 365 Customer Insights.

✓ Connected
[Sign out to connect to a different AAD tenant](#)

2. Select the Dynamics 365 Customer Insights instance you wish to connect to
Dynamics 365 Customer Insights instance

CI ILT

3. Indicate which Dynamics 365 Customer Insights field matches the Dynamics 365 Contact Id
Dynamics 365 contact id field

System.Customer.D365CustSvc.Contacts.contactid

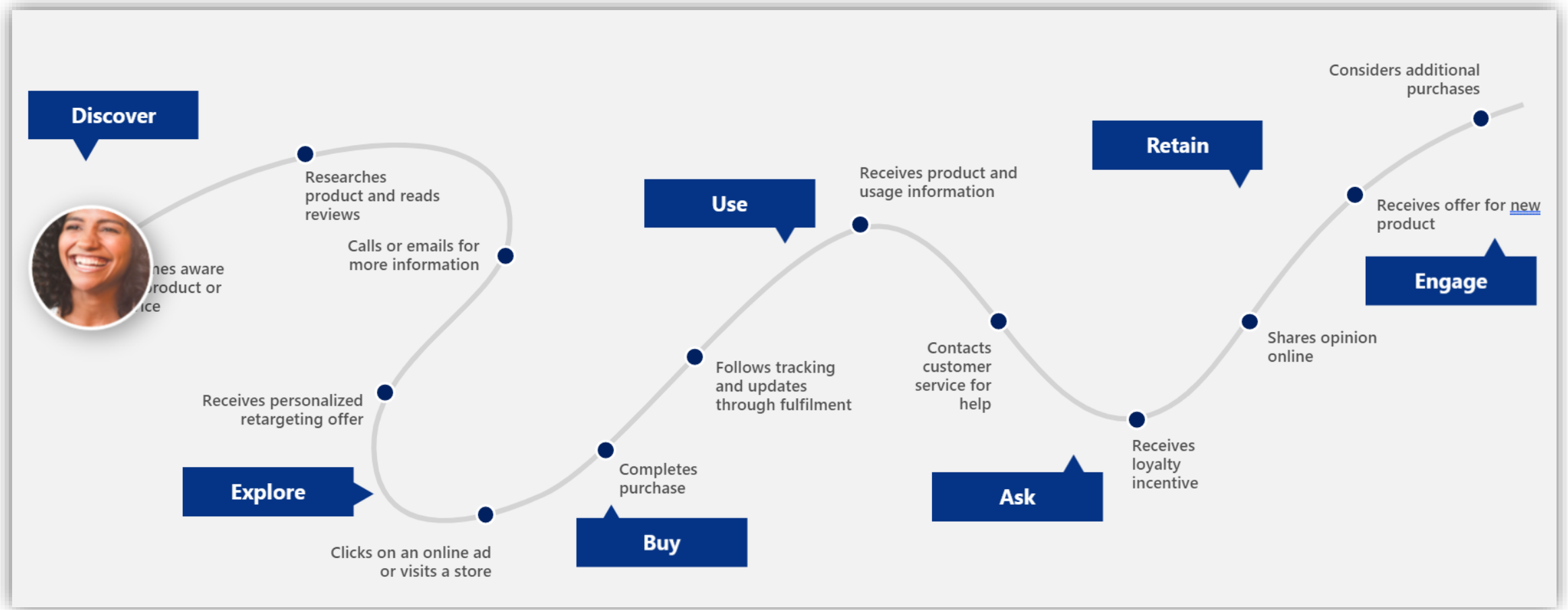
4. Indicate which Dynamics 365 Customer Insights field matches the Dynamics 365 Account Id
Dynamics 365 account id field

System.Customer.CustomerId

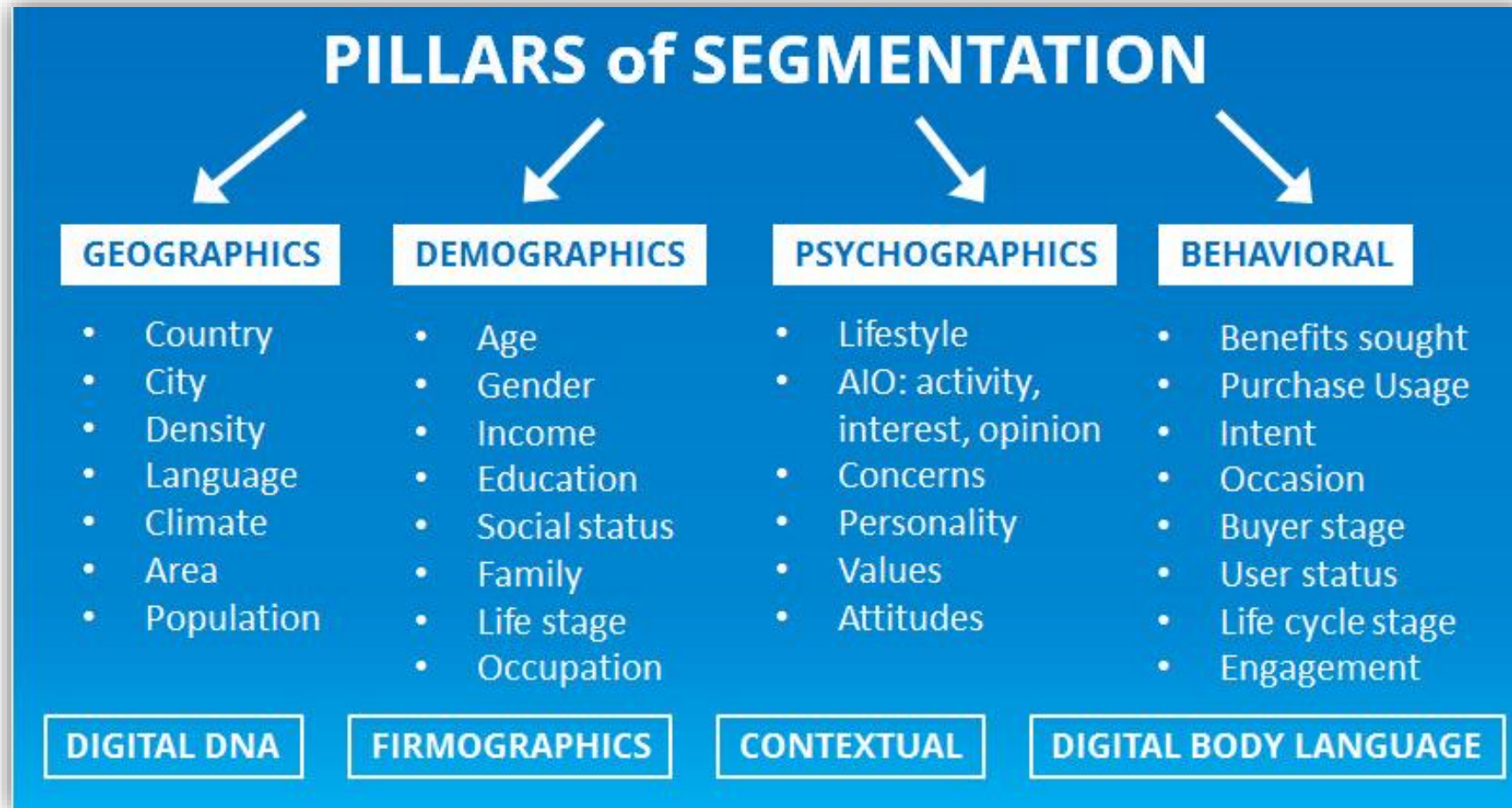
Save configuration

You will need to assign the role 'Customer Insights Card Customizer' role to all users who need to configure the Ci

Dynamics 365 Marketing and the Customer Journey



Today's Customer Journeys are Driven by Rich Data



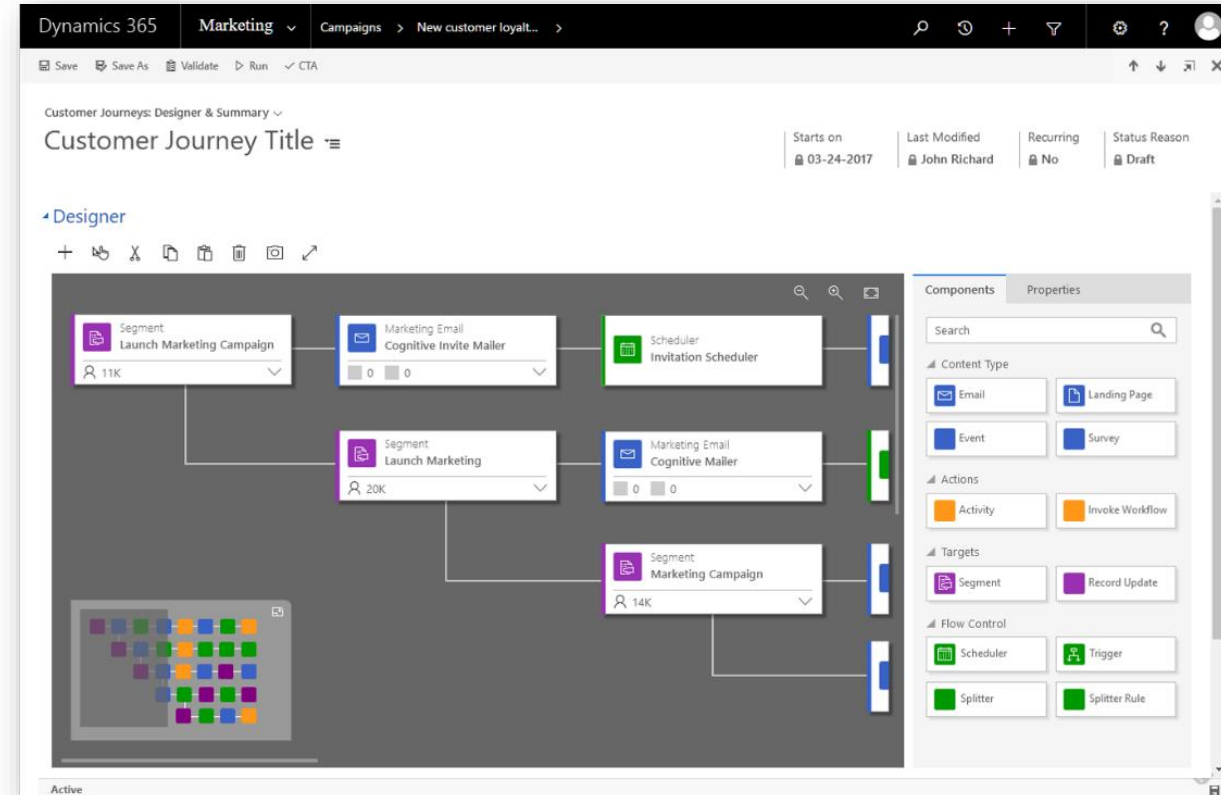
Marketing automation examples that benefit from Customer Insights

Customer journey with personalized Emails

- Send newsletters and emails for key events such as birthdays and anniversaries.
- Order notifications, product follow-ups and recommendations maintain customer connection and drive repeat business.

Improved targeting and communications

- Create target segments based on unified data from different sources.
- Abandoned carts are identified and gentle reminders to finish the purchase are sent to the customer
- Re-Engagement initiatives track customer engagement levels and take appropriate action



Activating Customer Insights with Dynamics 365 Marketing

Setup and configuration:

- ✓ Define export destination with Dynamics 365 Marketing connector
- ✓ Connect to your Dynamics 365 instance
- ✓ Match Customer Insights field to Marketing ContactID
- ✓ Identify Customer Insights segment(s) to export to Marketing
- ✓ In Marketing, use segment to orchestrate the Customer Journey



Dynamics 365 Marketing
Marketing automation

Use the segments created in Customer Insights to generate campaigns and leverage specific groups of customers with Dynamics 365 Marketing.

[Learn more about Marketing](#)

[Set up](#)



Display name

Type

Created



MarketingSegments

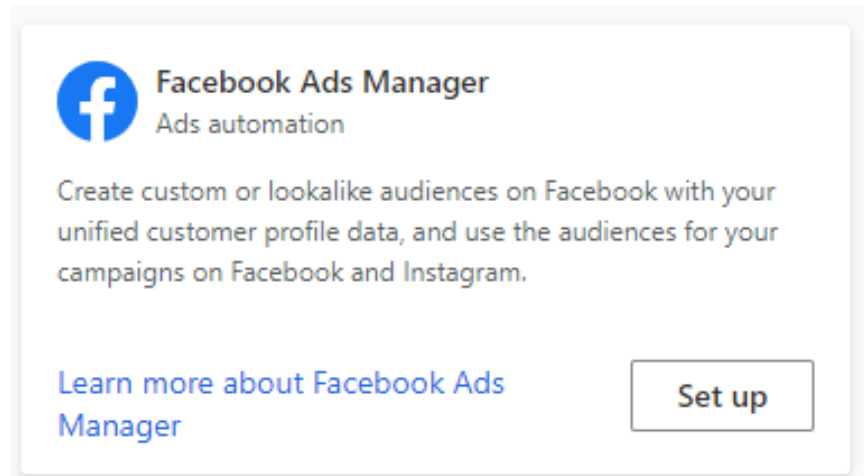
Dynamics 365 Marketing (Segments)

5 days ago

Exporting to Facebook Ad Manager (1 of 2)

Customer Insights segments may be exported to Facebook Ads audiences

- ✓ A business Facebook account, and an associated Ads account are required
- ✓ From Customer Insights, go to Admin>Export Destinations
- ✓ Set up new destination
- ✓ Connect with Facebook credentials



Set up Facebook Ads Manager

Display name *

CIReadiness

You can change this later.

Facebook Login

You need to have a Ad Account which includes a Facebook Business Account



Continue with Facebook

Exporting to Facebook Ad Manager (2 of 2)

Exporting segments to Facebook Ads

- ✓ Select Facebook Ad account
- ✓ Link to existing or define new custom audience
- ✓ Map fields between CI and FB
- ✓ Select a source segment
- ✓ Data exported on refresh interval

Facebook Ads Configuration

Current configuration by Contoso Adv

Facebook Ad Account *

Dynamics 365 Customer Insights (636031613891189)

Custom Audience *

Export to Facebook Ads Manager (23844947616530641)

[+ New custom audience](#)

Set up Facebook Ads Manager

Display name *

CIReadiness

You can change this later.

Facebook Login

You need to have a Ad Account which includes a Facebook Business Account



Continue with Facebook

Set up Facebook Ads Manager

The latest data from the selected customer attributes will be exported daily

Connect data

Choose a key identifier and select the fields that correspond with

Choose your key identifier *

Email

EMAIL *

Email

Select segments

Segments are exported automatically when your data refreshes.

☐ Segments

☐ CustomersFromWashington

☐ SummerPromotion

☐ HighChurnRiskHotelCustomers

☐ SummerPromotionExpansion

☒ HighValueOnlineCustomers

Complying with General Data Protection Regulation



Customer Insights supports Data Subject Rights (DSR) requests under GDPR



The “right to erasure” by the removal of personal data from an organization’s customer data is a key protection in the General Data Protection Regulation (GDPR). Removing personal data includes removing all personal data and system-generated logs, except audit log information.

Responding to GDPR data subject delete requests

In order to respond, you need to know where the data is stored:

- ✓ Customer data in Customer Insights is ingested from original data sources external to Customer Insights. *All GDPR delete requests must be performed in the original data source.*
- ✓ Data for Customer Insights users is created by Customer Insights. *All GDPR delete requests must be performed in Customer Insights.*

Responding to GDPR data subject export requests

Dynamics 365 Customer Insights offers a mechanism to find or export personal data for a specific user.

Both require the action of the D365 tenant admin, in conjunction with the Dynamics 365 Customer Insights team (D365CI@microsoft.com)

- ✓ Export customer data
- ✓ Export Customer Insights user data

Lab 5 Extend the Solution with Dynamics 365

In this lab, you will:

Add an integrated Customer Card to Dynamics 365 Customer Service

Integrate Customer Insights with Dynamics 365 Marketing

Estimated time: 60 mins