



Dynamics 365 Customer Insights

Infrastructure Provisioning

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Approximate Time to Complete – 30 mins

This lab contains step-by-step instructions to provision and configure a Customer Insights environment, including prerequisites. This should only be followed if the environment has not been set up for your training session. If it has, you can skip this lab

Note: Completing this lab requires enrolling in certain Microsoft cloud services using trial subscriptions. You may need to supply your own telephone number and a credit card to subscribe. To avoid charges, remember to cancel your trial subscriptions at the end of the course, or before the trial periods end (durations vary by product).

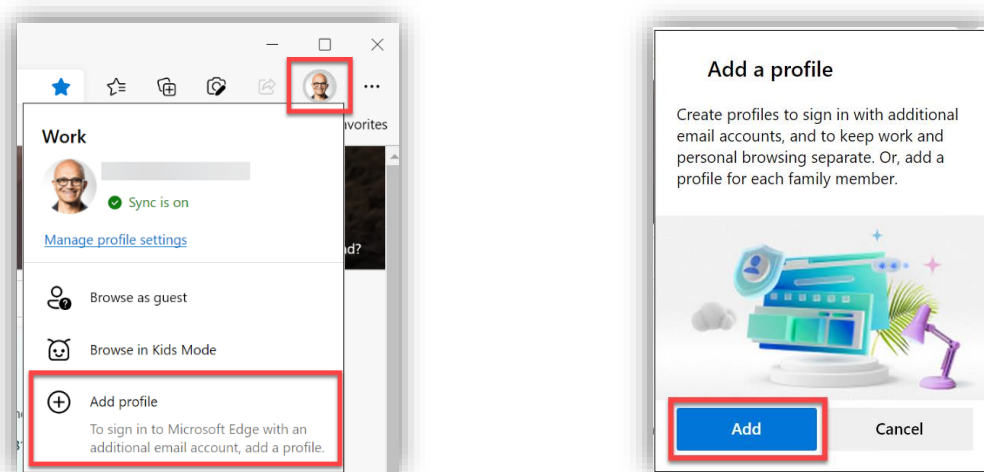
Step 1 – Browser Setup

Since you'll be using test and trial accounts, it is best to do the labs in a separate browser environment. We recommend you use a new browser profile, but you can also use Guest mode. Using a browser profile you can save favorites, user ids and passwords that will be available whenever you open that profile. With guest mode, nothing is saved from session to session. Choose the best fit for you:

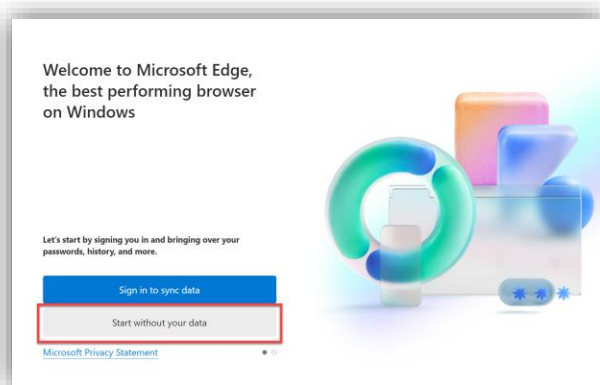
- **Microsoft Edge Profile**
- **Google Chrome Profile**
- **Microsoft Edge Guest**
- **Google Chrome Guest**

Microsoft Edge Profile

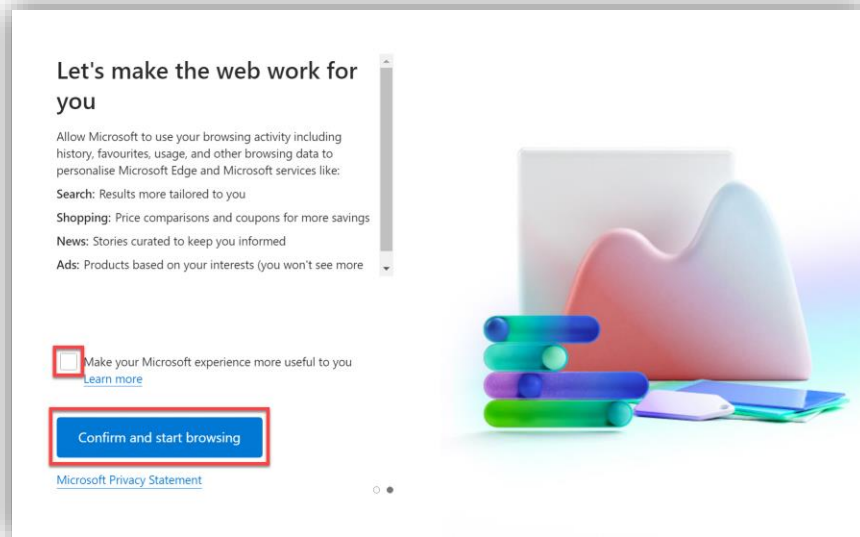
1. **Launch Edge**, click on **the profile image**, select **Add profile** and then **Add**



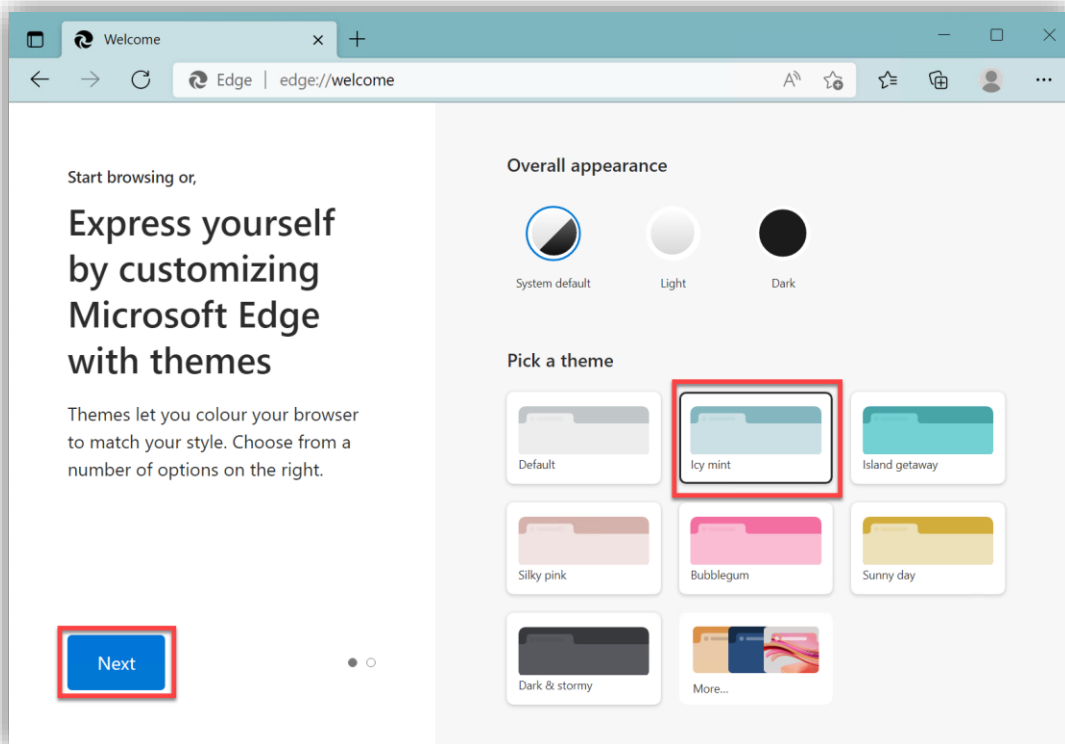
2. Select **Start without your data**



3. **Uncheck Make your Microsoft experience more useful to you** and then select **Confirm** and start browsing

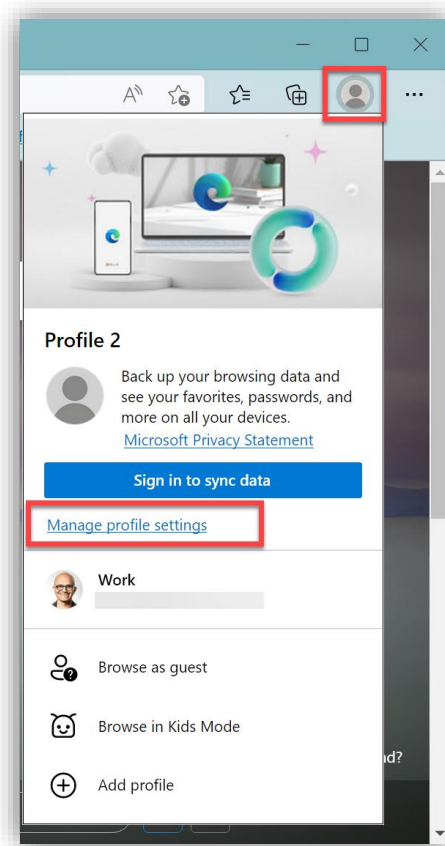


4. **Pick a theme** if you'd like and select **Next** (picking a theme is recommended so you can easily recognize your profile when multiple browser windows/profiles are open)

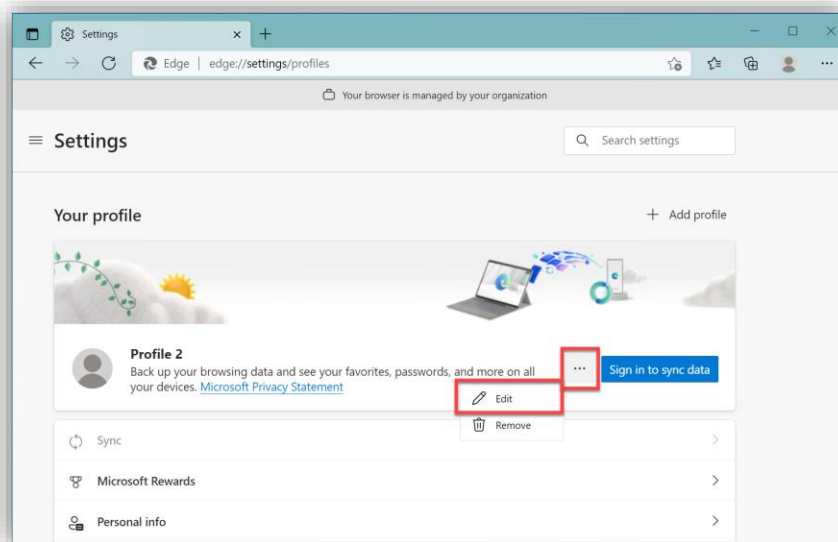


5. Select **Finish**

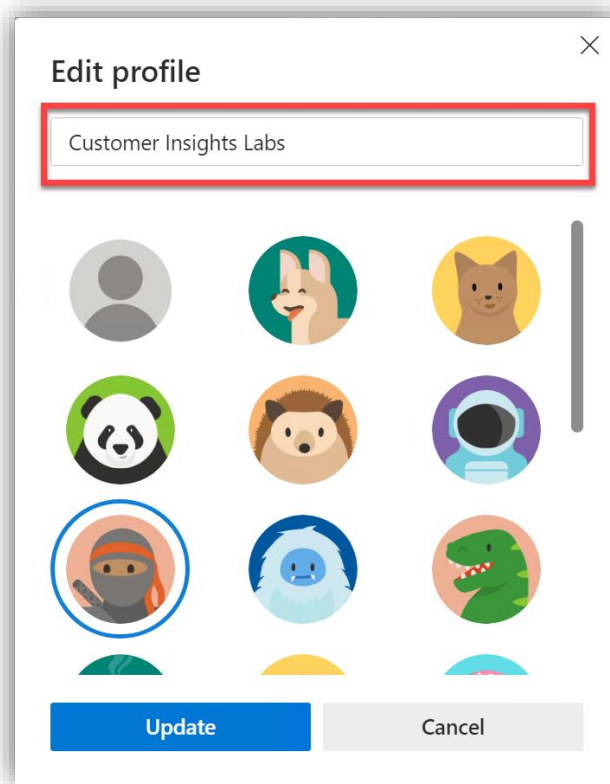
6. In the newly created profile browser window, click on the **profile image** and select **Manage Profile Settings**



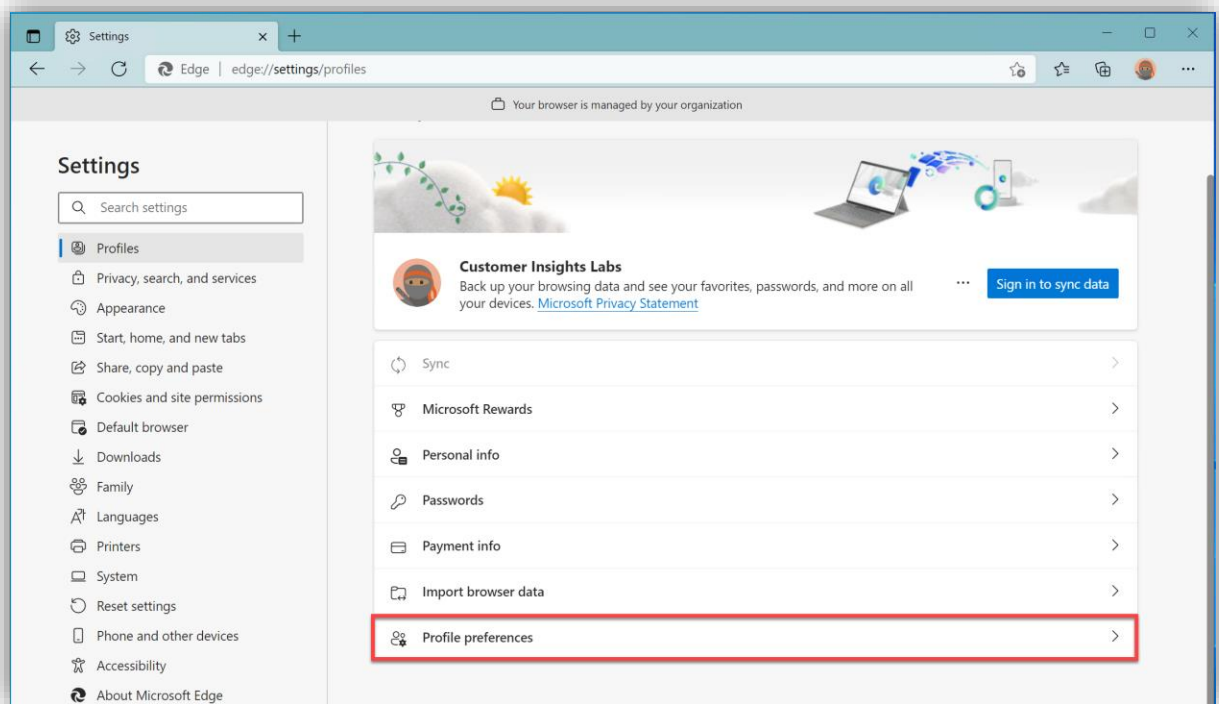
7. Click on the **ellipsis** to the right of the profile details and select **Edit**



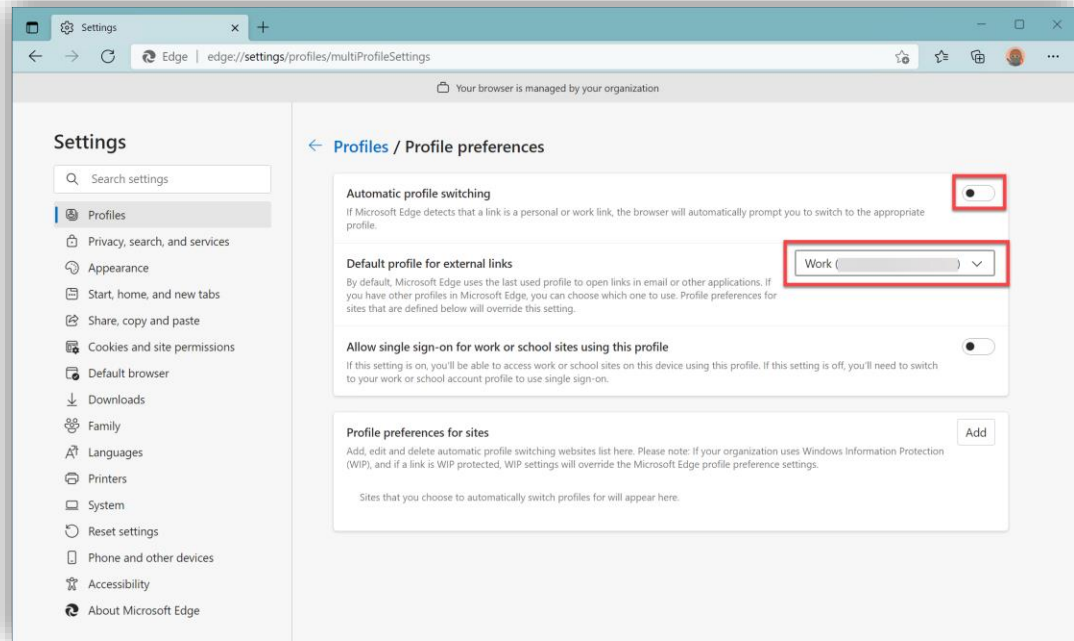
8. Name your profile, choose an image if you'd like and select **Update**



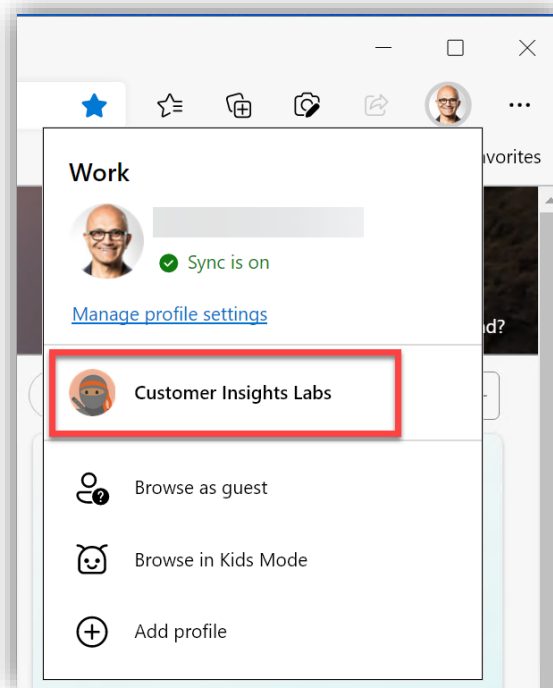
9. Select **Profile preferences**



10. Turn off **Automatic profile switching**, select your **Work profile** as the **default for external links**

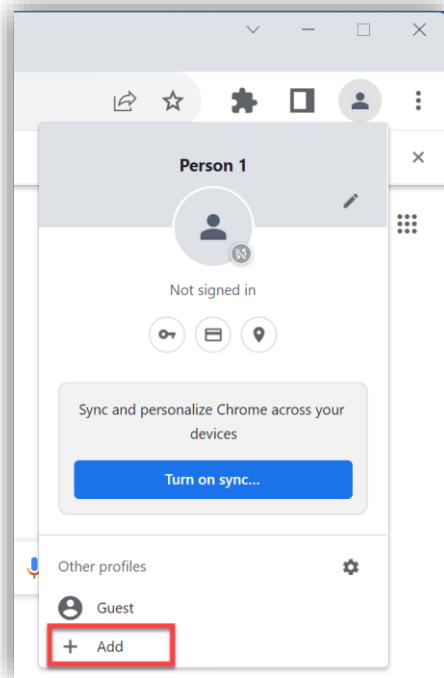


11. **Microsoft Edge Profile setup is complete.** You can go to Step 2 and start setting up your trials in this browser profile. To launch this profile in the future, select the profile image in the top right and then select your profile.

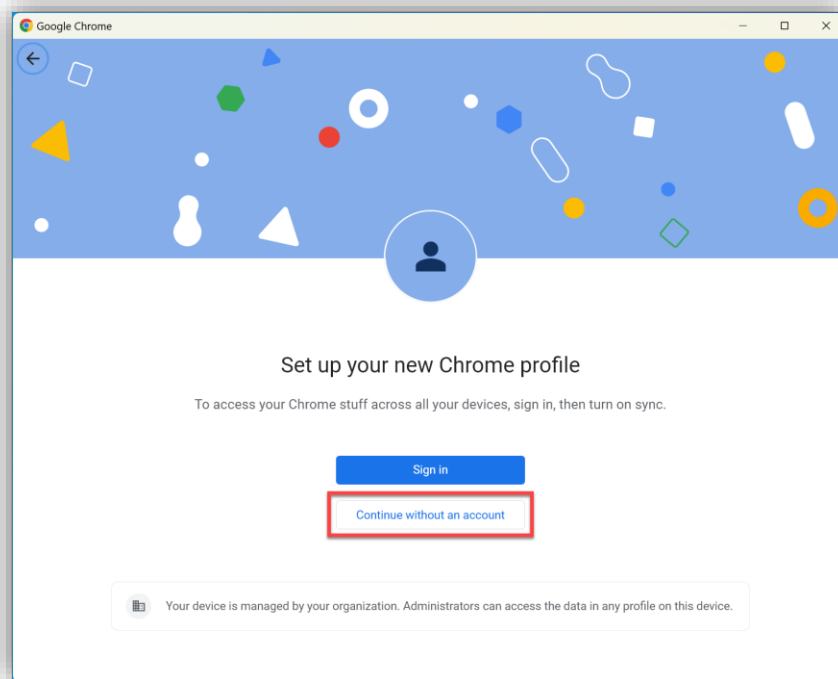


Google Chrome Profile

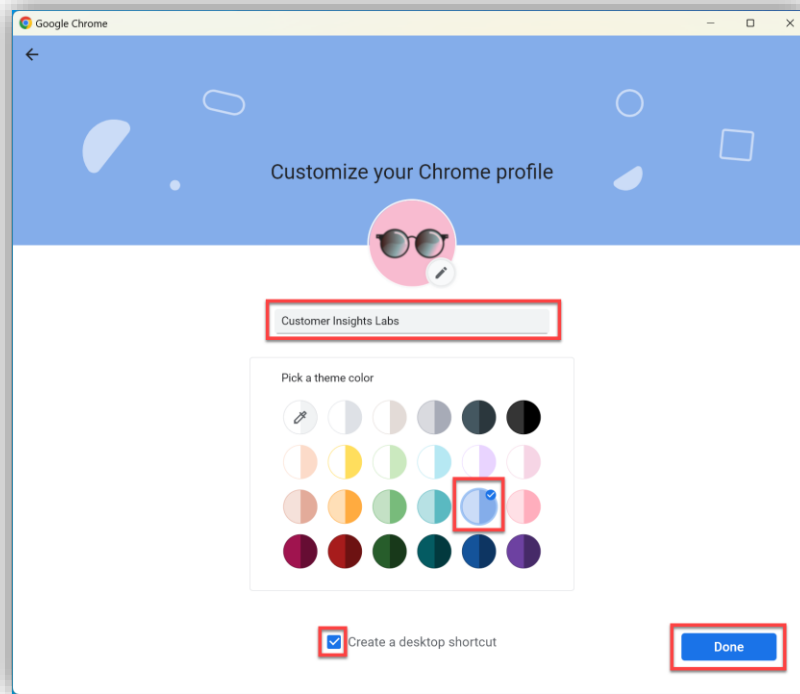
1. **Launch Google Chrome**, select the **profile image** and select **+ Add**



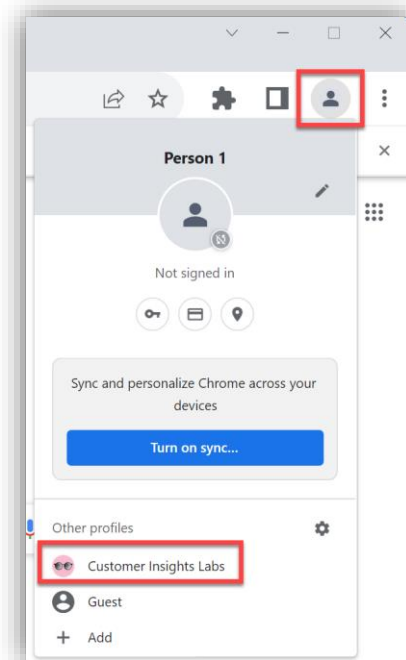
2. Select **Continue without an account**



3. **Add a Name, pick a theme color, choose if you want a desktop shortcut or not, and then select Done**

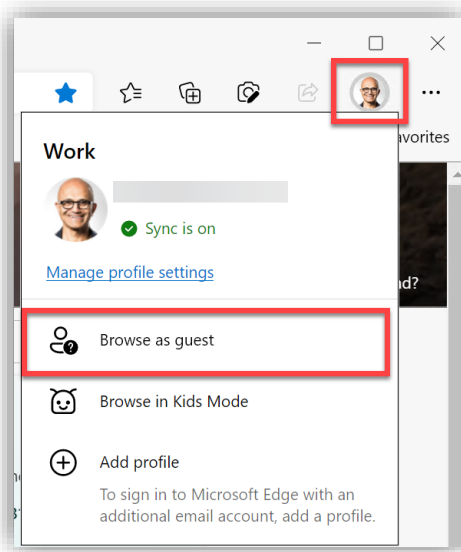


4. **Google Chrome Profile setup is complete.** You can go to Step 2 and start setting up your trials in this browser profile. To launch this profile in the future, select the profile image in the top right and then select your profile.



Microsoft Edge Guest

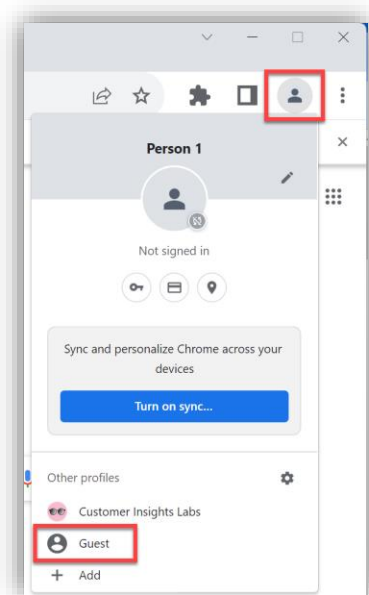
1. **Launch Microsoft Edge**, select the **profile picture** in the top right corner and select **Browse as Guest**



2. Go to Step 2 and start setting up your trials in Guest profile browser.

Google Chrome Guest

1. **Launch Google Chrome**, select the **profile picture** in the top right corner and select **Guest**

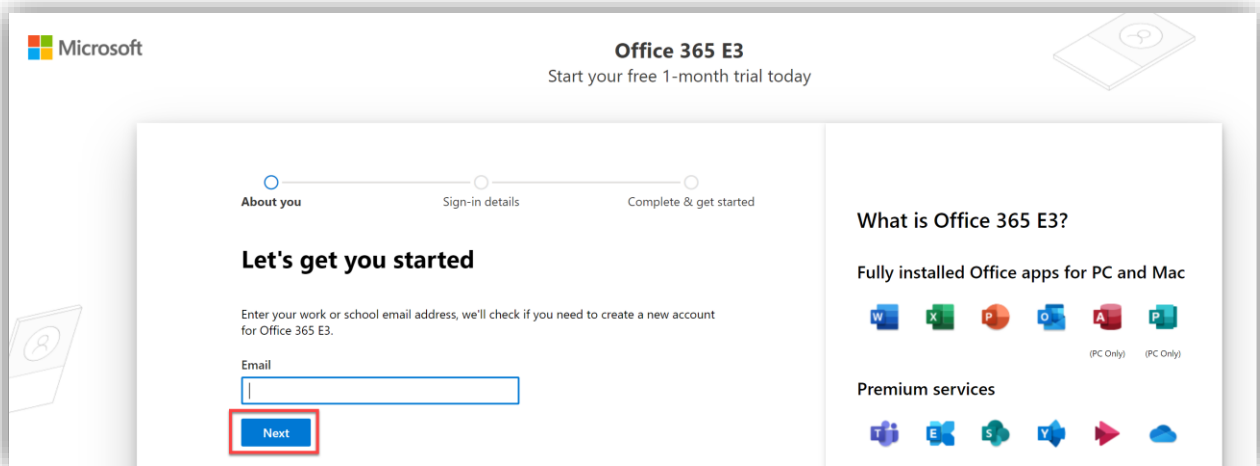


2. Go to Step 2 and start setting up your trials in Guest profile browser.

Step 2 – Office 365 Trial

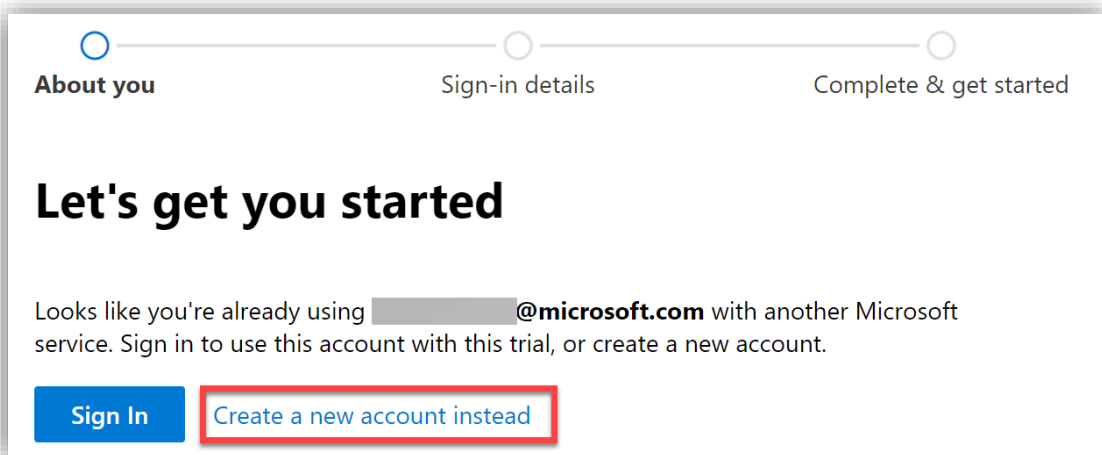
Create a trial Office 365 tenant/domain

1. Open a browser via one of methods from above (Browser profile you created or a Guest profile) and go to <https://aka.ms/appinadayo365signup>. Fill in your work email address and click **Next**



The screenshot shows the Microsoft Office 365 E3 trial sign-up page. At the top, it says "Office 365 E3" and "Start your free 1-month trial today". Below this is a progress bar with three steps: "About you", "Sign-in details", and "Complete & get started". The "About you" step is active. The main heading is "Let's get you started". Below this, it says "Enter your work or school email address, we'll check if you need to create a new account for Office 365 E3." There is an "Email" input field and a "Next" button, which is highlighted with a red box. To the right, there is a section titled "What is Office 365 E3?" with sub-sections "Fully installed Office apps for PC and Mac" (showing icons for Word, Excel, PowerPoint, Outlook, Access, and Publisher) and "Premium services" (showing icons for Teams, OneDrive, SharePoint, and Yammer).

2. Click on **Create a new account instead**



The screenshot shows the same Office 365 E3 trial sign-up page, but with a message indicating that the user is already using a Microsoft account. The message says: "Looks like you're already using [redacted]@microsoft.com with another Microsoft service. Sign in to use this account with this trial, or create a new account." Below the message are two buttons: "Sign In" and "Create a new account instead". The "Create a new account instead" button is highlighted with a red box.

3. Fill in your details and then click **Next**

The screenshot shows a form titled "Tell us about yourself" with a progress bar at the top indicating three steps: "About you" (active), "Sign-in details", and "Complete & get started". The form contains the following fields:

- First name (text input)
- Middle name (Optional) (text input)
- Last name (text input)
- Business phone number (text input)
- Company name (text input)
- Company size (dropdown menu with "Select one from below" as the placeholder)
- Country or Region (dropdown menu with "United States" as the selected option)

Below the form, there is a statement: "I understand that Microsoft may contact me about my trial. I will receive information, tips, and offers about solutions for businesses and organizations, and other Microsoft products and services. [Privacy Statement](#)."

There is an unchecked checkbox with the text: "I would like Microsoft to share my information with select partners so I can receive relevant information about their products and services. To learn more, view the [Privacy Statement](#)."

At the bottom, there is a blue "Next" button highlighted with a red rectangle.

4. Select **Text me** or **Call me**, enter your **phone number** and select **Send verification code**

The screenshot shows the same "Tell us about yourself" form, but with different content. The progress bar remains the same. The form now includes:

- A text or phone call helps us make sure this is you. Enter a number that isn't VoIP or toll free.
- Two radio buttons: "Text me" (selected) and "Call me".
- Country code (dropdown menu with "(+1) United States" as the selected option)
- Phone number (text input)

Below the form, there is a statement: "We don't save this phone number or use it for any other purpose."

At the bottom, there is a blue "Send verification code" button highlighted with a red rectangle, and a grey "Back" button next to it.

5. Enter your verification code and click **Verify**

6. Enter a **username** and **tenant/domain name**. We suggest using something unique and personal to you for the domain (e.g., your name, JoesCILab5, etc...). Click on **Save** (you will receive a notification if the domain name you chose isn't available. Try again until you have one that's accepted. Sometimes just adding a number to the end will make it unique)

Progress bar: ☒ About you | ☒ **Sign-in details** | ☐ Complete & get started

How you'll sign in

This username is what you'll use to sign in each time you use your apps. The domain name is a suggestion. You can change your domain now, or later at any time with your own custom domain.

Username: Domain name: .onmicrosoft.com **Save**

7. Enter a **Password**, **Confirm password** and click **Next** (note your password)

Progress bar: ☒ About you | ☒ **Sign-in details** | ☐ Complete & get started

How you'll sign in

This username is what you'll use to sign in each time you use your apps. The domain name is a suggestion. You can change your domain now, or later at any time with your own custom domain.

Username: Domain name: .onmicrosoft.com [Edit](#)

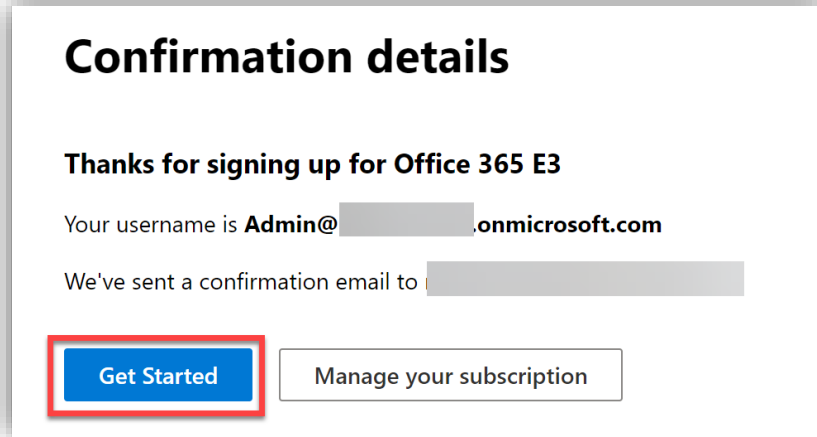
Password:

Confirm password:

By selecting **Next**, you agree to our [trial agreement](#).

Next

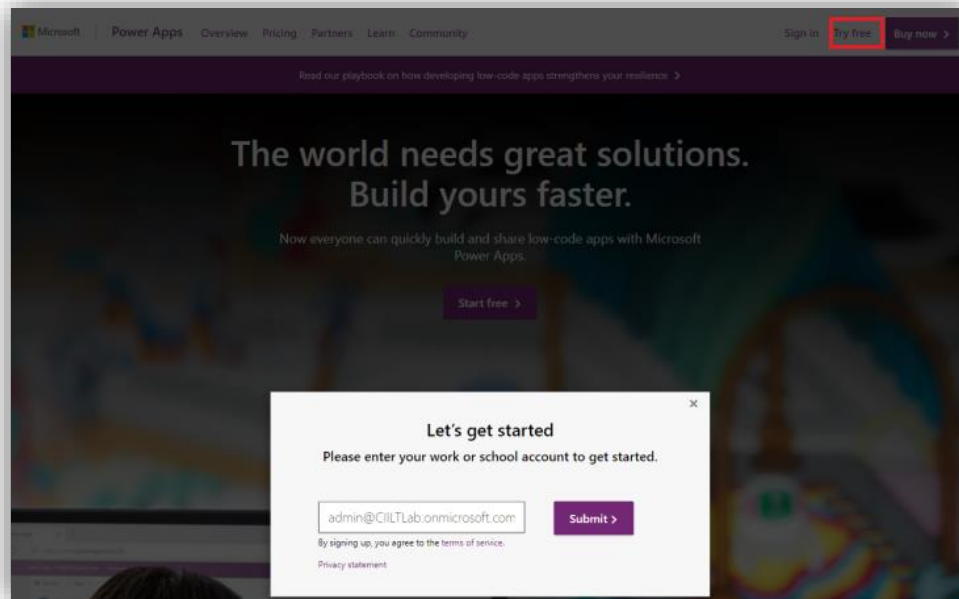
8. You will receive a confirmation email, but please note your username (you'll have something like admin@CIILTLab.onmicrosoft.com). Click **Get Started**



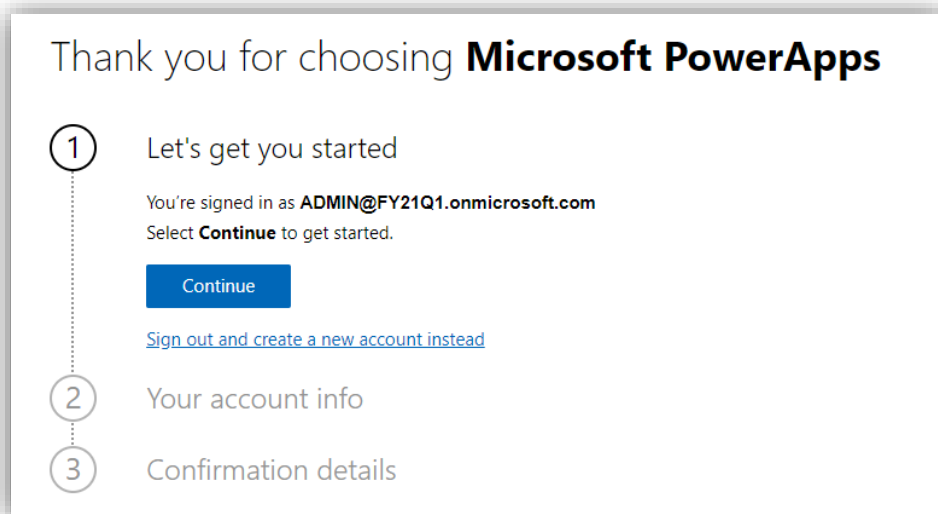
9. Office 365 E3 trial setup is complete

Step 2 – Power Apps License

1. Open a new tab and go to <https://powerapps.microsoft.com>. Click the **Try free** button on the top right and enter the email for username you created in the last step.



2. Click **Continue**

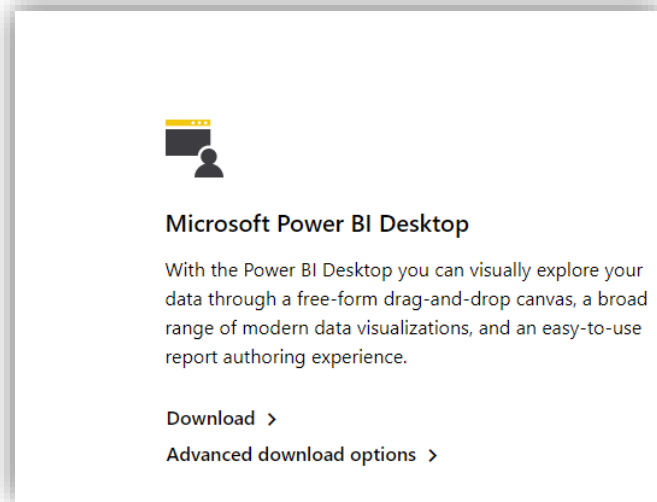


3. **Enter your phone number** and then click **Get Started** . Click **Get Started** again on the next screen

4. **Power Apps trial setup is complete**

Step 3 – Power BI Desktop

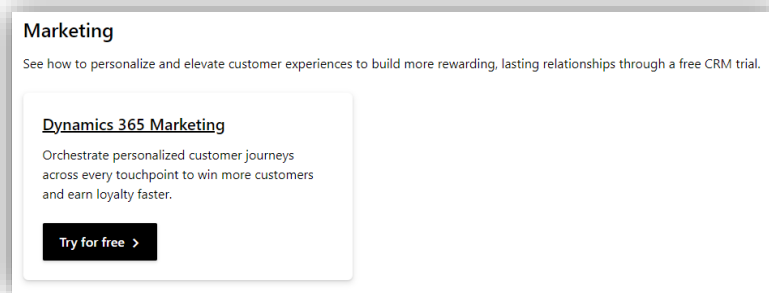
1. **Open a new tab, go to <https://powerbi.microsoft.com/en-us/downloads/>, click the **Download** link for **Microsoft Power BI Desktop** and **Install** from the downloaded file (If you are redirected to the Microsoft Store, install directly from there using the Get button)**



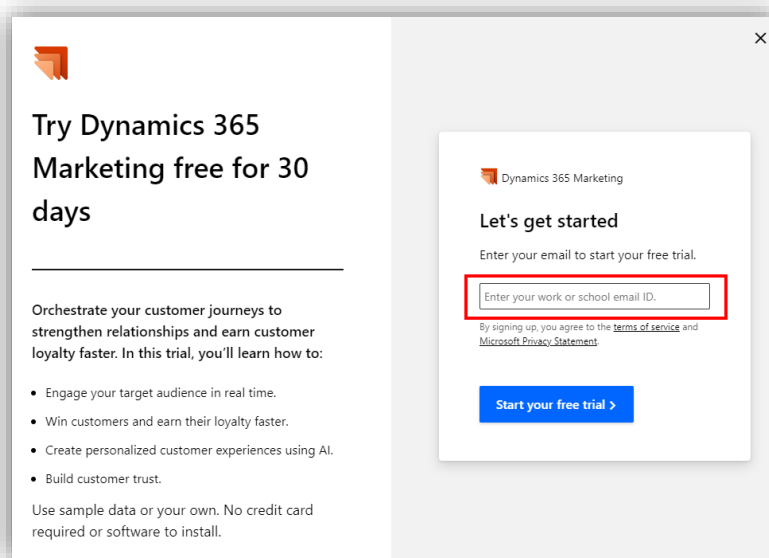
2. **Power BI Desktop setup is complete**

Step 5 – Dynamics 365 Marketing Trial

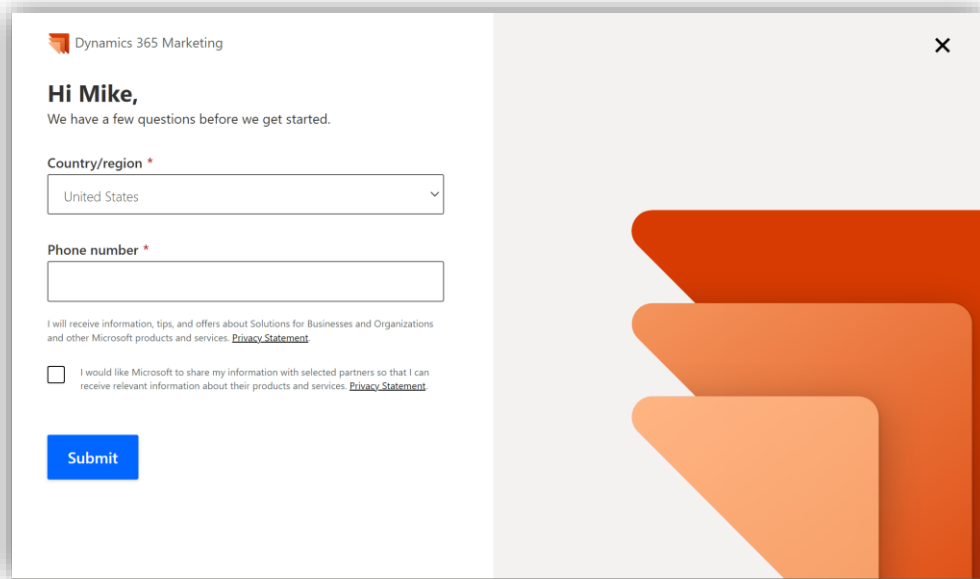
1. Go to <https://dynamics.microsoft.com/en-us/dynamics-365-free-trial/>. On the page scroll down to the Marketing section and click the **Try for free** button.



2. Enter the username/email you created in Step 2 (something like admin@CIILTLab.onmicrosoft.com) and click the **Start your free trial** button.



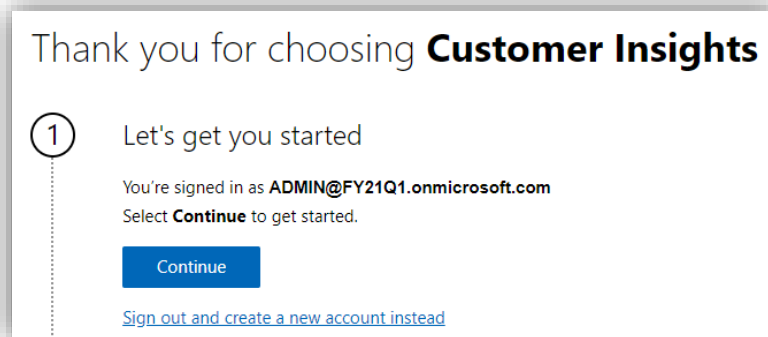
3. **Select your country**, enter your **phone number** and click the **Submit**



4. Note the URL domain (you will need this later). E.g., <https://org12345671.crm.dynamics.com> (It is highly recommended to add a bookmark to this page)
5. **Dynamics 365 Marketing trial setup is complete**

Step 6 – Customer Insights Trial

1. Go to <https://aka.ms/tryci>
2. If you do not see the username you created in this lab, click the **Sign out and create a new account instead** and sign in with it.



Thank you for choosing **Customer Insights**

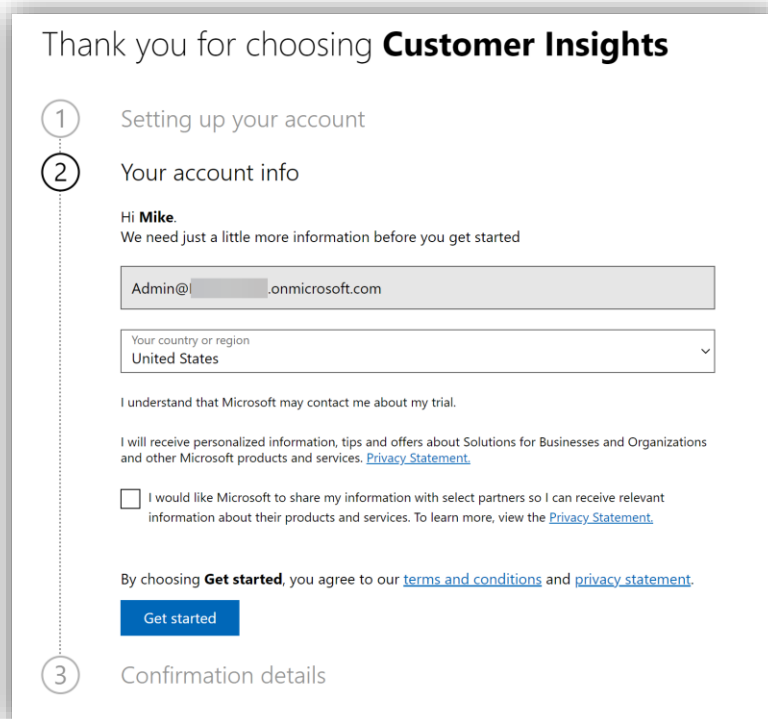
① Let's get you started

You're signed in as **ADMIN@FY21Q1.onmicrosoft.com**
Select **Continue** to get started.

[Continue](#)

[Sign out and create a new account instead](#)

3. Click **Continue** when you are signed in as the correct username
4. Select **Your country or region** and click **Get started**. Click **Get Started** again on the confirmation screen



Thank you for choosing **Customer Insights**

① Setting up your account

② Your account info

Hi **Mike**.
We need just a little more information before you get started

Admin@[redacted].onmicrosoft.com

Your country or region
United States

I understand that Microsoft may contact me about my trial.

I will receive personalized information, tips and offers about Solutions for Businesses and Organizations and other Microsoft products and services. [Privacy Statement](#)

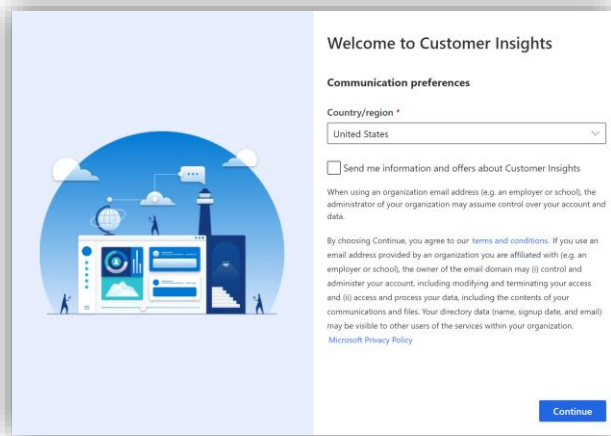
☐ I would like Microsoft to share my information with select partners so I can receive relevant information about their products and services. To learn more, view the [Privacy Statement](#).

By choosing **Get started**, you agree to our [terms and conditions](#) and [privacy statement](#).

[Get started](#)

③ Confirmation details

5. Select your country and click **Continue**



Welcome to Customer Insights

Communication preferences

Country/region *

United States

☐ Send me information and offers about Customer Insights

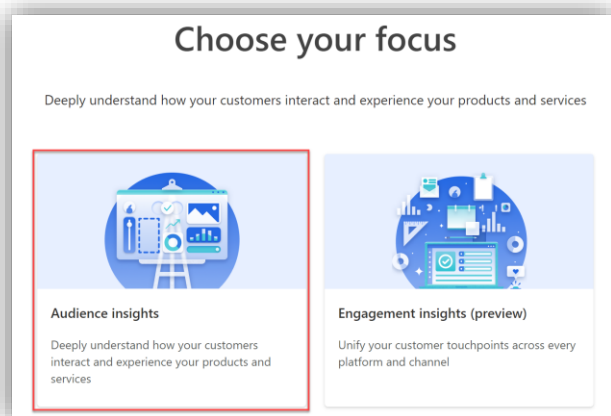
When using an organization email address (e.g. an employer or school), the administrator of your organization may assume control over your account and data.

By choosing Continue, you agree to our [terms and conditions](#). If you use an email address provided by an organization you are affiliated with (e.g. an employer or school), the owner of the email domain may (i) control and administer your account, including modifying and terminating your access and (ii) access and process your data, including the contents of your communications and files. Your directory data (name, sign-up date, and email) may be visible to other users of the services within your organization.

[Microsoft Privacy Policy](#)


Continue

6. Click **Audience Insights**




Choose your focus

Deeply understand how your customers interact and experience your products and services



Audience insights

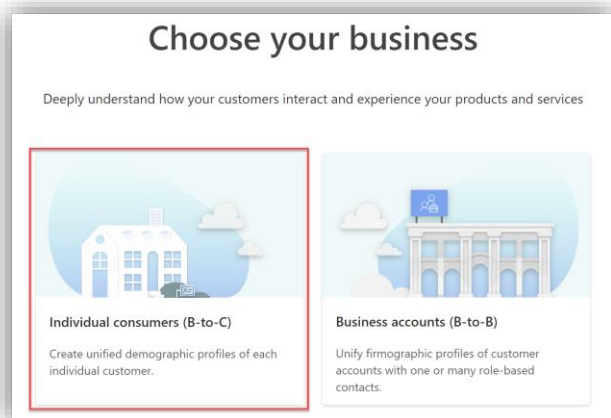
Deeply understand how your customers interact and experience your products and services



Engagement insights (preview)


Unify your customer touchpoints across every platform and channel

7. Select **Individual Consumers (B-to-C)**




Choose your business

Deeply understand how your customers interact and experience your products and services



Individual consumers (B-to-C)

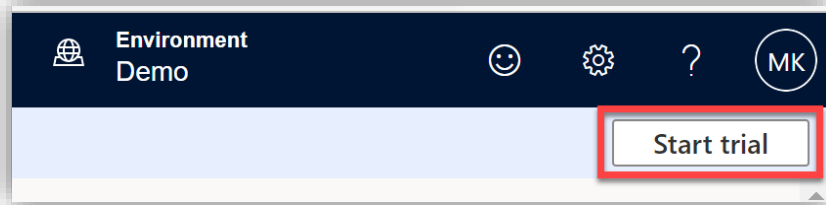
Create unified demographic profiles of each individual customer.



Business accounts (B-to-B)

Unify firmographic profiles of customer accounts with one or many role-based contacts.

- Click **Start trial** in the top right corner.



- Enter a **name** for your Environment (e.g., **B-to-C Labs**), select **Individual consumers (B-to-C)** for Choose your business, select a **region** closest to you and click **Next**.

A screenshot of the 'Create an environment' dialog box. The left sidebar shows a progress indicator with four steps: 'Basic information' (selected), 'Data storage', 'Microsoft Dataverse', and 'Review'. The main area is titled 'Basic information' and contains the following fields: 'Name' (text input with 'CI ILT Lab'), 'Type' (dropdown menu with 'Trial'), and 'Region' (dropdown menu with 'West US'). At the bottom, there are three buttons: 'Next' (highlighted in blue), 'Review and finish', and 'Cancel'.

- You should see Data Storage. Click **Next**

A screenshot of the 'Data storage' step in the environment setup. The title is 'Data storage' with a help icon. Below it is the text 'Azure Datalake storage for your high performance Audience Insights work loads.' There is a section 'Save output data to' with a dropdown menu showing 'Customer Insights storage'.

- Enter your **Dynamics 365 Marketing Trial environment URL**, e.g., <https://org1234567a.crm.dynamics.com>. If you don't have the D365 Marketing tab/window still open or don't have a bookmark/favorite to it, follow these steps to find it: Go to <https://aka.ms/ppac> -> **Environments** -> **Marketing Trial** then click on the Environment URL to launch Marketing app. Copy/paste the D365 Marketing environment URL into the Dataverse environment URL field. Click **Next**

Microsoft Dataverse

Provide your own Microsoft Dataverse environment to share data (profiles and insights) with Dataverse based business applications. Leave this field empty if you don't have one and we will provision one for you and share data with Dataverse.

Microsoft Dataverse environment URL

12. Review the details and click **Create**

- Basic information
- Data storage
- Microsoft Dataverse
- Review

Review

Basic information [Edit](#)

Name: CI ILT Lab

Type: Trial

Region: West US

Data storage [Edit](#)

Output storage type: Customer Insights storage

Microsoft Dataverse [Edit](#)

Server address:

[Back](#)
[Create](#)

13. Once the environment setup is complete, you should be at the Home page for the new environment. Verify the environment was changed to the one you just created by checking the name in the top right corner. If it isn't, change it by clicking **Environment** and selecting yours.



14. **Customer Insights Trial setup is complete**

15. **All provisioning steps are complete! You are now ready for the core labs!**