



Microsoft Cloud for Retail

In A Day

Module 01: Solution Center

Step-by-Step Lab

March 2022

Contents

- Exercise 1: Create and Configure Dynamics 365 Customer Insights Environment..... 3
 - Task 1: Create Customer Insights Environment..... 3
 - Task 2: Deploy Retail Churn Model..... 7
- Summary 10

Exercise 1: Create and Configure Dynamics 365 Customer Insights Environment

In this exercise, you will create and configure a Dynamics 365 Customer Insights environment in order to deploy the Retail Churn Model.

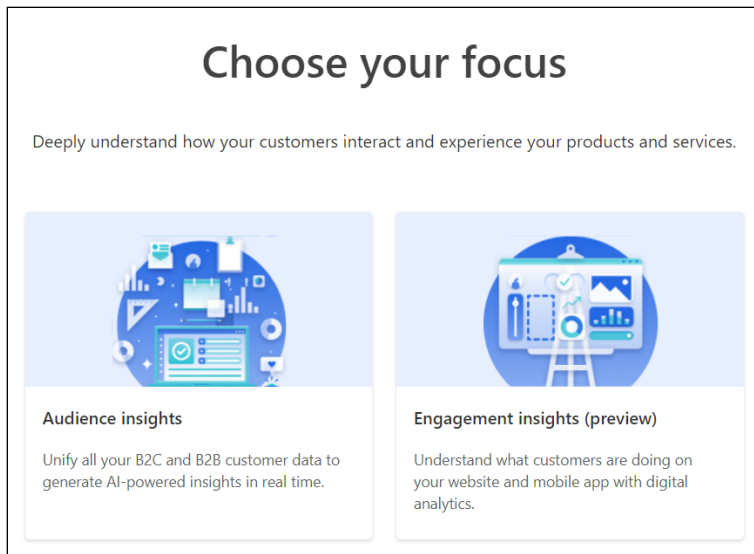
[Dynamics 365 Customer Insights](#) is a part of Microsoft's customer data platform (CDP) that helps deliver personalized customer experiences. The platform's capabilities provide insights into who your customers are and how they engage with your platform. Unify customer data across multiple sources to get a single view of customers.

- [Audience insights](#) helps you transform your business into a customer-centric organization. Marketing, sales, and service professionals have the insights they need to personalize experiences. Connect data from transactional, behavioral, and observational sources to create a 360-degree customer view. See results faster with a CDP designed to deliver insights that can be acted upon.
- [Retail channel churn predictive model](#): Retail channel churn predictive model, a key feature of Unified customer profile, uses an AI-based model to help omnichannel retailers use cross-channel data to assess the chance that a customer will churn—stop actively buying.

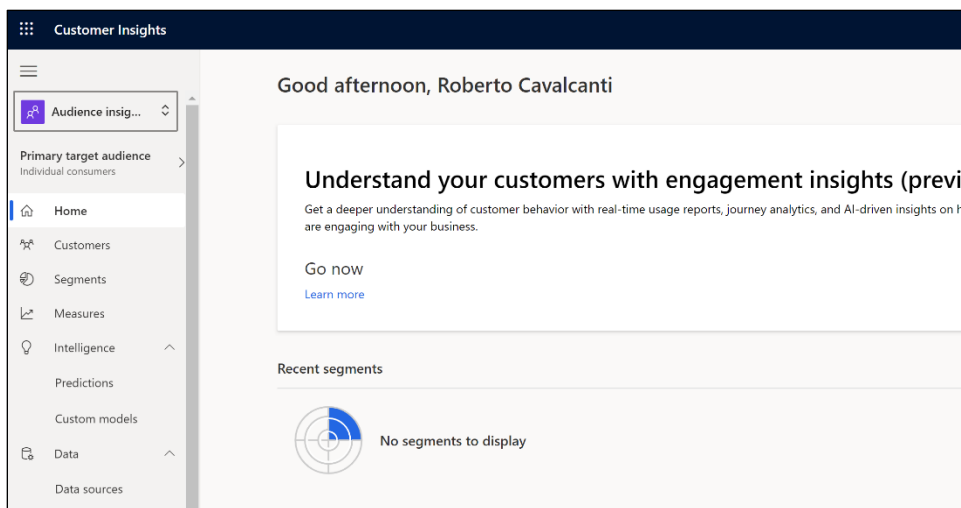
Task 1: Create Customer Insights Environment

In this task you will create a new Customer Insights sandbox environment. To set **Customer intelligence** up correctly, you must first create a Customer Insights sandbox environment and connect it to your Dataverse environment with no Data Sources specified. Once connected, you will go through [Solution Center](#) and deploy **Customer intelligence** from **Unified customer profile**, specifying the Customer Insights environment that you create in this task.

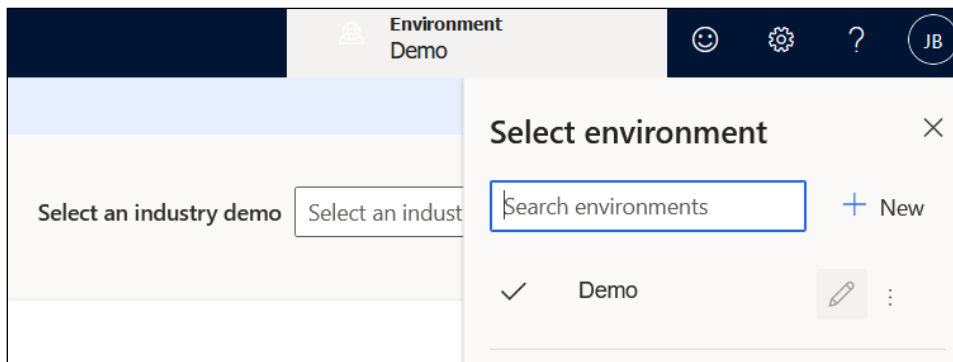
1. Using an In-Private or Incognito window, navigate to <https://home.ci.ai.dynamics.com/> and log in with the credentials provided by your instructor in the training information document.
2. If not already selected, select **Audience insights** as your focus.



3. Your screen would look like this with Audience Insights selected:



4. In the top right corner of the screen, click on the environment name and then click **+ New** to create a new environment



5. Fill out the appropriate fields and click **Next**.
 - a. **Name:** <<UserName>> Retail Churn
 - b. **Choose your business:** Individual consumers (B-to-C)
 - c. **Type:** Pitch Demo
 - d. **Region:** West US

Create an environment

Basic information

Advanced reporting

Data storage

Microsoft Dataverse

Review

Basic information

Environments serve as a home base for your data and for your team.

Name *

Retail Churn

☐ Copy from existing environment (preview)

Select an environment

Choose your business *

Individual consumers (B-to-C)

Type *

Pitch Demo

Region * ⓘ

West US

Next

Review and finish

Cancel

6. **Deselect** Power BI Reporting and click **Next**.

Create an environment

Basic information

Advanced reporting

Data storage

Microsoft Dataverse

Review

Advanced reporting

Use Microsoft Power BI to visualize your data.

☐ Power BI reporting

Perform computations using *

Power BI with Azure Synapse Analytics

Sign into Power BI to pick a capacity

Sign in

Select a capacity *

Subscription *

Select an option

Synapse workspace *

Select an option

Back

Next

Review and finish

Cancel

7. Leave **Customer Insights storage** selected and click **Next**.

Create an environment

✓ Basic information

✓ Advanced reporting

● Data storage

○ Microsoft Dataverse

○ Review

Data storage

Azure Datalake storage for your high performance Audience Insights work loads.

Save output data to *

Customer Insights storage

Back

Next

Review and finish

Cancel

8. Leave the Microsoft Dataverse environment URL blank and click **Next**.

Create an environment

✓ Basic information

✓ Advanced reporting

✓ Data storage

● Microsoft Dataverse

○ Review

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

https://myorg.crm.dynamics.com

Back

Next

Review and finish

Cancel

9. Click **Create**.

Create an environment

×

✓ Basic information

✓ Advanced reporting

✓ Data storage

✓ Microsoft Dataverse

● Review

Review

Basic information

Name:

Retail Churn

[Edit](#)

Audience type:

Individual consumers (B-to-C)

Type:

PitchDemo

Region:

West US

Advanced reporting

User capacity selected:

No

[Edit](#)

Data storage

Output storage type:

Customer Insights storage

[Edit](#)

Microsoft Dataverse

Server address:

--

[Edit](#)

Enable data sharing:

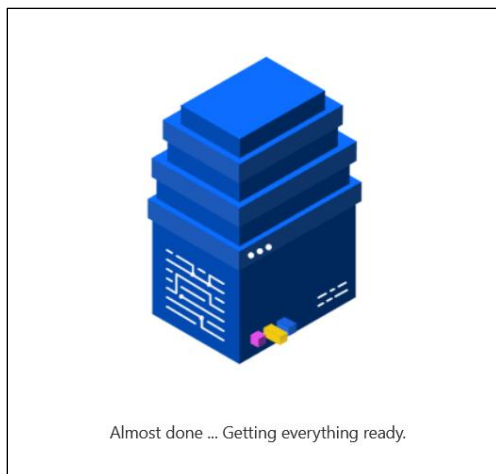
No

Back

Create

Cancel

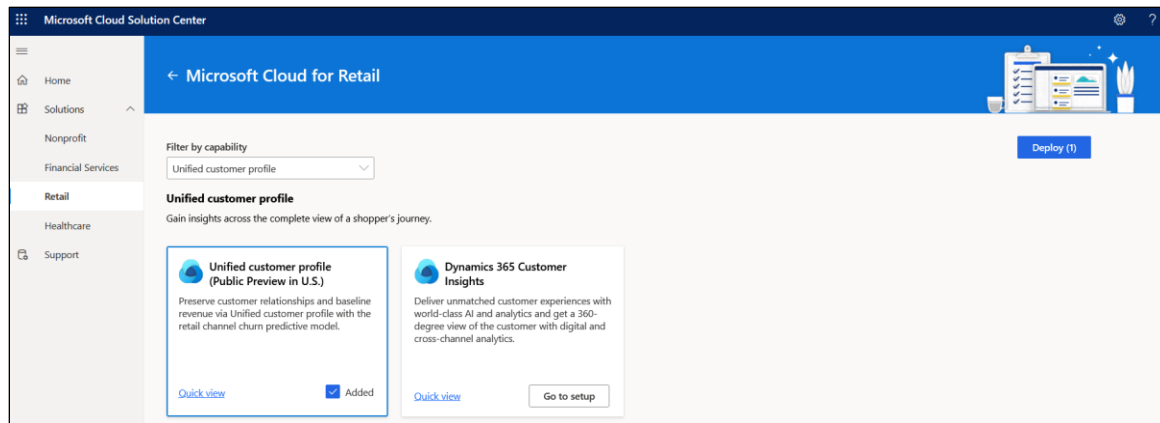
10. Wait for the environment to be created



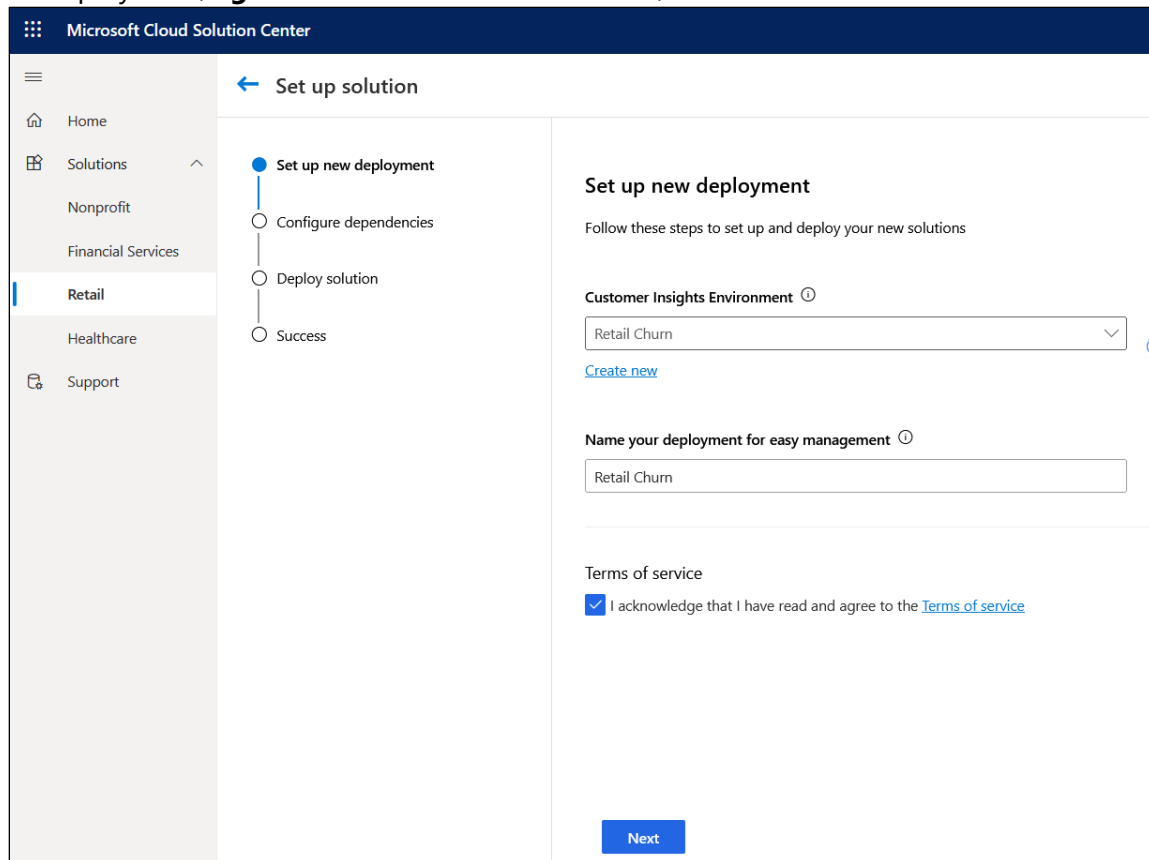
Congratulations! You have successfully created a CI environment.

Task 2: Deploy Retail Churn Model

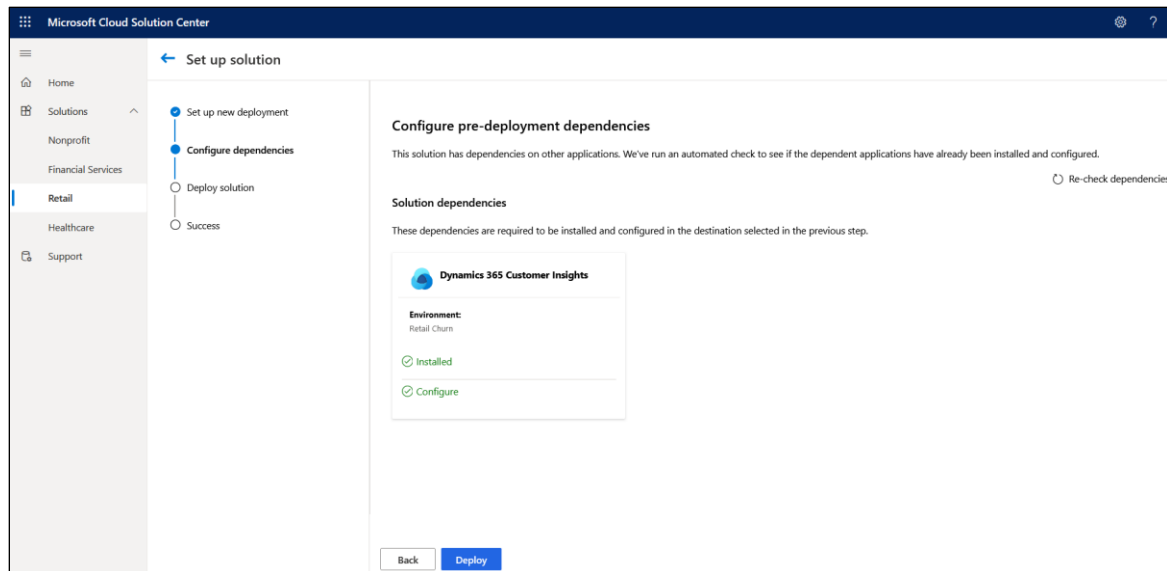
1. Open a **new tab** in in-private browser tab and navigate to the Microsoft Cloud Solution Center at solutions.microsoft.com with the credentials provided by the instructor in the training information document.
2. Expand **Retail** and navigate to **Unified customer profile**. Check **Add** next to Unified customer profile and then click **Deploy**.



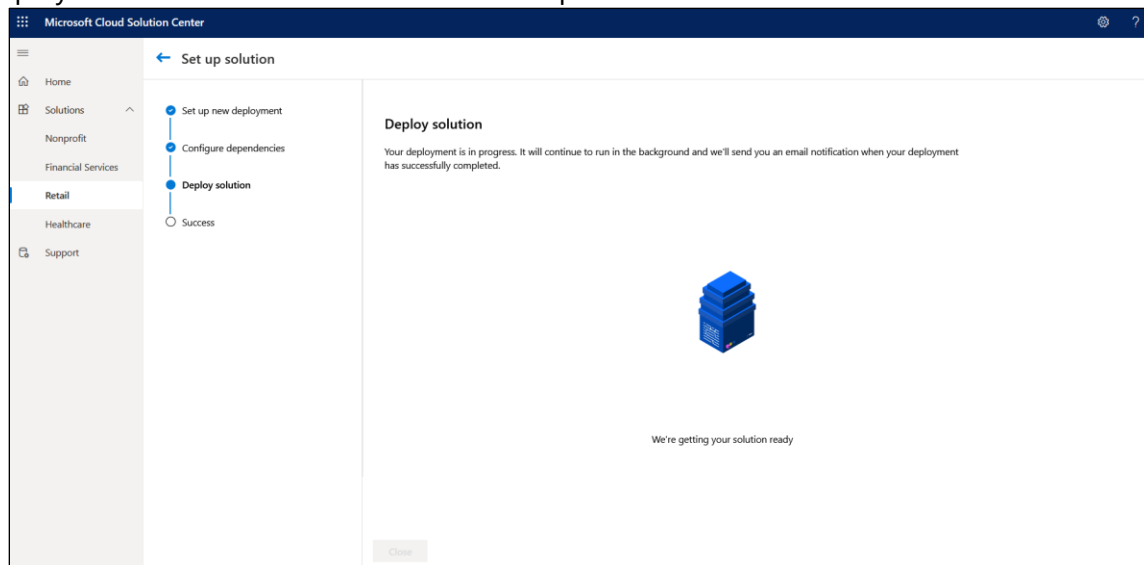
3. Select the **Customer Insights Environment** that you created in the previous task, **provide a name** for your deployment, **agree** to the terms and conditions, and click **Next**.



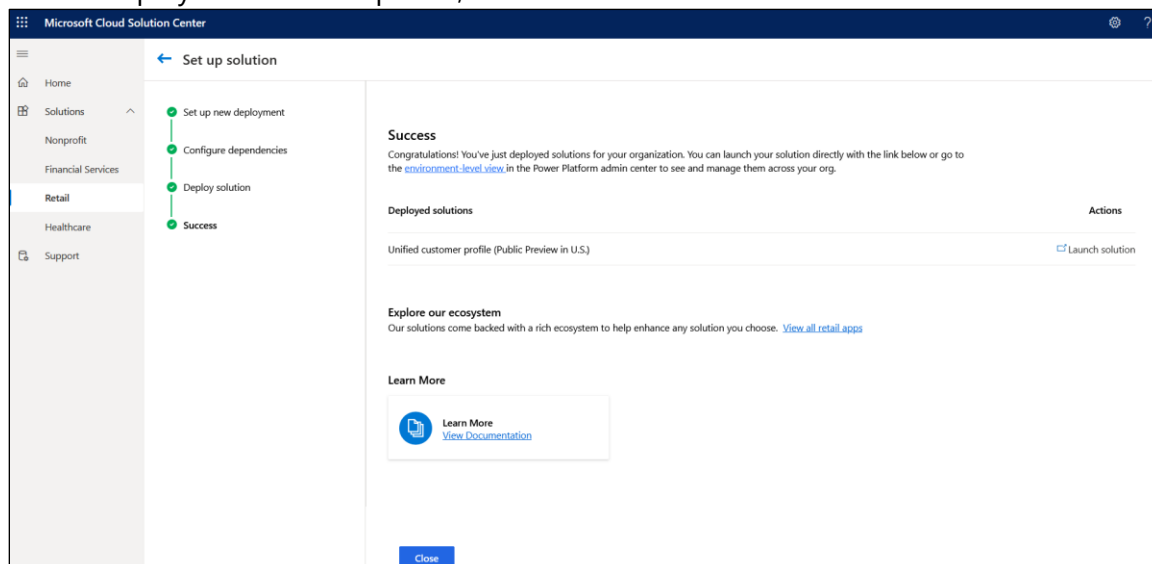
4. Click Deploy to deploy the Retail Churn model to your Customer Insights environment.



5. Deployment will take several minutes to complete.



6. Once the deployment has completed, click **Close**.



Congratulations! You have successfully deployed Retail Churn Model.

Summary

Nice work! You have completed the lab for Microsoft Cloud for Retail Solution Center.

In this lab, you learned how to do the following:

1. Create a D365 Customer Insights Environment
2. Deploy Retail Churn Model via Solution Center