



Customer Insights Advanced Training

Infrastructure Provisioning

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Approximate Time to Complete – 30 mins

Step 1 – Office 365 Trial

The first step in the process is to create an Office 365 tenant for your user accounts. Open an “in private” browser window and navigate to <https://aka.ms/appinadayo365signup>. Fill in your email address and click **Next**

Let's get you started

Enter your work or school email address, we'll check if you need to create a new account for Office 365 E3.

Email

This is required

Next

On the next screen, you will want to click on the **Create a new account instead**

Let's get you started

Looks like you're already using [REDACTED] with another Microsoft service. Sign in to use this account with this trial, or create a new account.

Sign In Create a new account instead

You are now able to fill in information about yourself, then click **Next**

Tell us about yourself

First name

Middle name (Optional)

Last name

Business phone number

Company name

Company size

Select one from below

Country or Region

United States

Next

Now you will be asked for a phone number to text or call with a verification code.

2 Tell us about yourself

✓ ●

Prove. You're. Not. A. Robot.

Enter a number that isn't VoIP or toll free.

☒ Text me ☐ Call me

Code (+1) Phone number

We don't save this phone number or use it for any other purpose.

Send Verification Code

< Go back

2 Tell us about yourself

✓ ●

Prove. You're. Not. A. Robot.

Enter a number that isn't VoIP or toll free.

☐ Text me ☒ Call me

Code (+1) Phone number 4149785926

We don't save this phone number or use it for any other purpose.

Enter your verification code

Didn't get it or need a new code? [Try again](#)

Verify Change my phone number

After entering the verification code and continuing you will next be able to choose your business identity. You will need to provide an admin user account. The Username will be the admin account, the domain will be the domain address you will use for your account. Enter a password into both fields. Then click **Next**.

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

admin

@

Domain name

test887766.onmicrosoft.com

Save

Password

••••••••••

👁

Confirm password

••••••••••

👁

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

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](#).

☐ 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](#).

Next

Once everything completes you will get a page like this where you can click **Get Started** if you'd like to setup mail or install office apps. For the purposes of this training you are done at this point and do not need to do either of those things.

Confirmation details

Thanks for signing up for Office 365 E3

Your username is **admin@test887766.onmicrosoft.com**

We've sent a confirmation email to 

[Get Started](#)[Manage your subscription](#)

Step 2 – Customer Insights Trial

Now that we have setup our Admin user, Power Apps license and Dynamics we are ready to request our Trial of Customer Insights. Open a new “in private” browser instance and navigate to <https://aka.ms/tryci>.

On the page enter the email for your admin account created in Step 1, like this and then click **Next**.

Thank you for choosing **Customer Insights**

① Let's get you started

Enter your work or school email address, we'll check if you need to create a new account.

By proceeding you acknowledge that if you use your organization's email, your organization may have rights to access and manage your data and account.
[Learn More](#)

Next

② Your account info

If prompted click **Sign In**

Thank you for choosing **Customer Insights**

① Let's get you started

Looks like you're already a Microsoft customer. Sign in as **admin@test887766.onmicrosoft.com** to get Customer Insights with your account.

Sign in

Next click **Get Started**

2

Your account info

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

admin@test887766.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

Now confirm your details and click **Get Started**

1

Setting up your account

2

Thanks for creating an account with us, Matthew

3

Confirmation details

Thanks for signing up.

Your user ID is **admin@test887766.onmicrosoft.com**.

Get Started

A new tab will open. Select your Country/Region 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](#) (including the [preview terms](#) for the engagement insights preview). 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, signup date, and email) may be visible to other users of the services within your organization. [Microsoft Privacy Policy](#)

Continue

Finally, click the **Audience insights** option for your focus.


Choose your focus

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



Audience insights

Unify all your B2C and B2B customer data to generate AI-powered insights in real time.




Engagement insights (preview)

Understand what customers are doing on your website and mobile app with digital analytics.

For the Choose your Business 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.

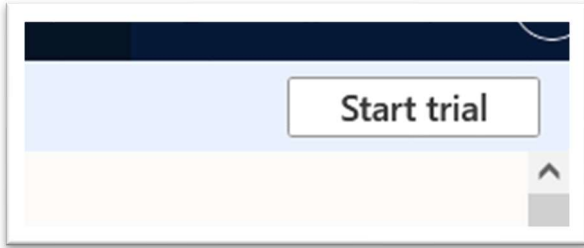


Business accounts (B-to-B)

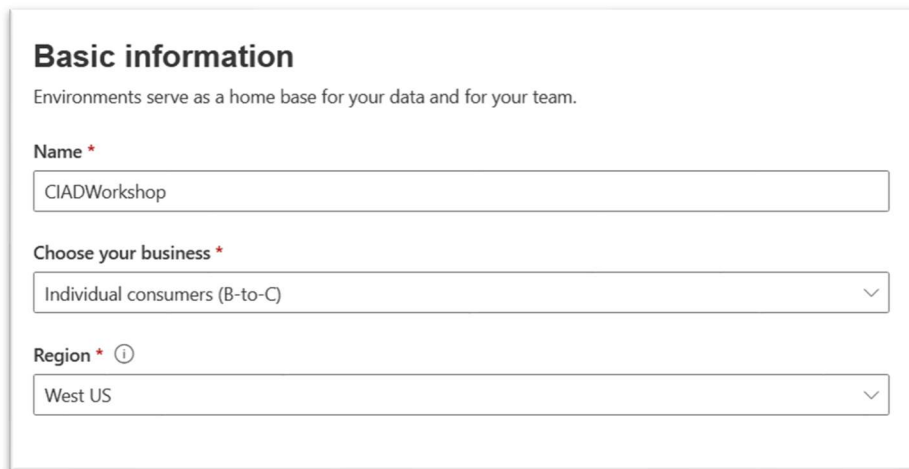
Unify firmographic profiles of customer accounts with one or many role-based contacts.

It will do a few screen refreshes and then ask you to login again, use the same user login you used on the first screen and the click accept on the permissions pop-up. The final steps take place in Customer Insights.

Next click the **Start trial** button in the top left corner of the screen.



Next you will create the environment. We suggest you name it **CIADWorkshop**. Select **Individual consumers (B-toC)** for the Choose your business dropdown. Select a region that is near your location. Once you enter the name and select the region you can click **Review and Finish**.



Basic information

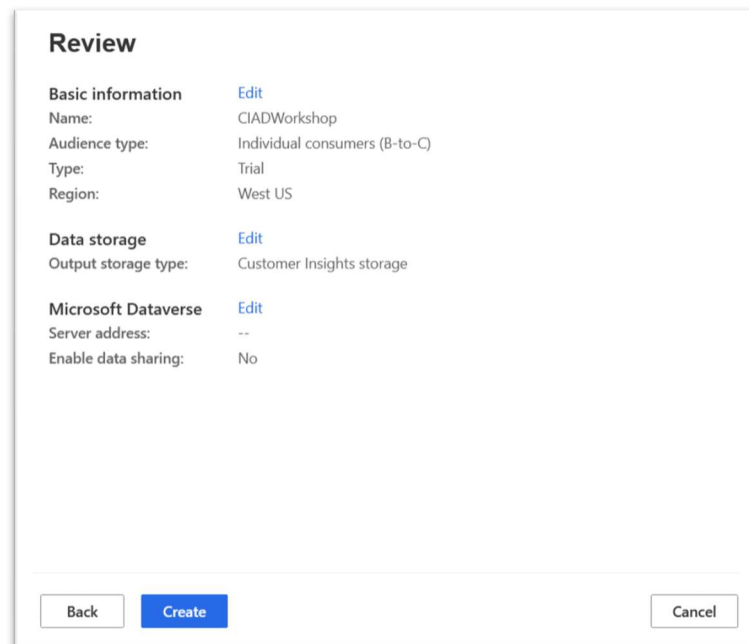
Environments serve as a home base for your data and for your team.

Name *

Choose your business *

Region * ⓘ

Finally, you will see the screen below and click **Create**.

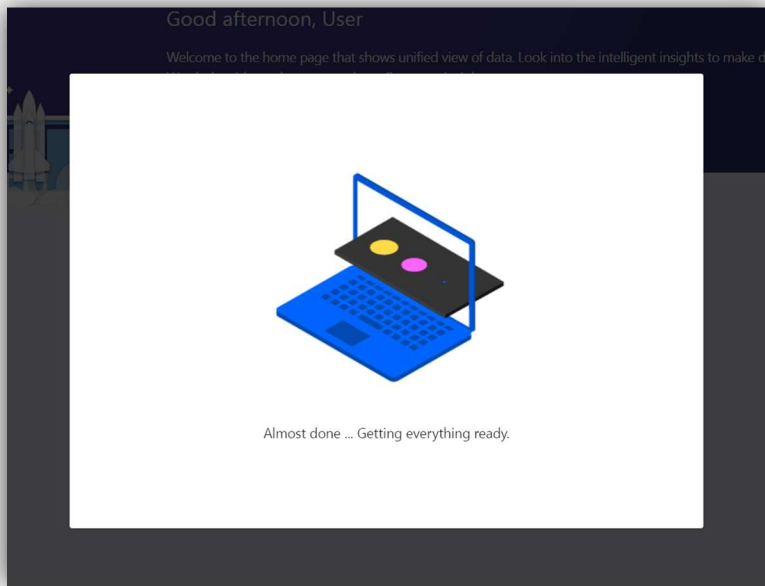


Review

Basic information	Edit
Name:	CIADWorkshop
Audience type:	Individual consumers (B-to-C)
Type:	Trial
Region:	West US
Data storage	Edit
Output storage type:	Customer Insights storage
Microsoft Dataverse	Edit
Server address:	--
Enable data sharing:	No

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

If all has gone as it should you should now be seeing the **Almost done...** screen.



Step 3 – Install Visual Studio Community

For the extensibility lab we will use Visual Studio to create a small application. You will need to install the Community edition of Visual Studio to do this lab.

Navigate to <https://docs.microsoft.com/en-us/visualstudio/releases/2019/release-notes> and click on the **Download Community 2019**



Once it downloads in your browser **Run** the executable to install the package.