

Dynamics 365 Customer Insights

Customer Insights in a Day

Hands on Lab Guide

Module 0: Prerequisites

V1.3, August 2019

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Feedback

If you have feedback relating to the Customer Insights in a Day content or assets please send to ciadfeedback@microsoft.com.

Prerequisites

Dynamics 365 Customer Service

You will require a Dynamics 365 for Customer Service Instance.

Dynamics 365 Customer Insights

You will require a Dynamics 365 Customer Insights instance. Ideally (but not required) this will be within the same tenant, accessible with the same credentials as those used to access your Dynamics 365 Customer Service instance.

Later Modules

Later Modules will require that you have access to the following. Ideally, these should be within the same tenant and accessible with the same credentials as your Dynamics 365 Customer Service instance.

- PowerBI
- PowerApps
- Flow

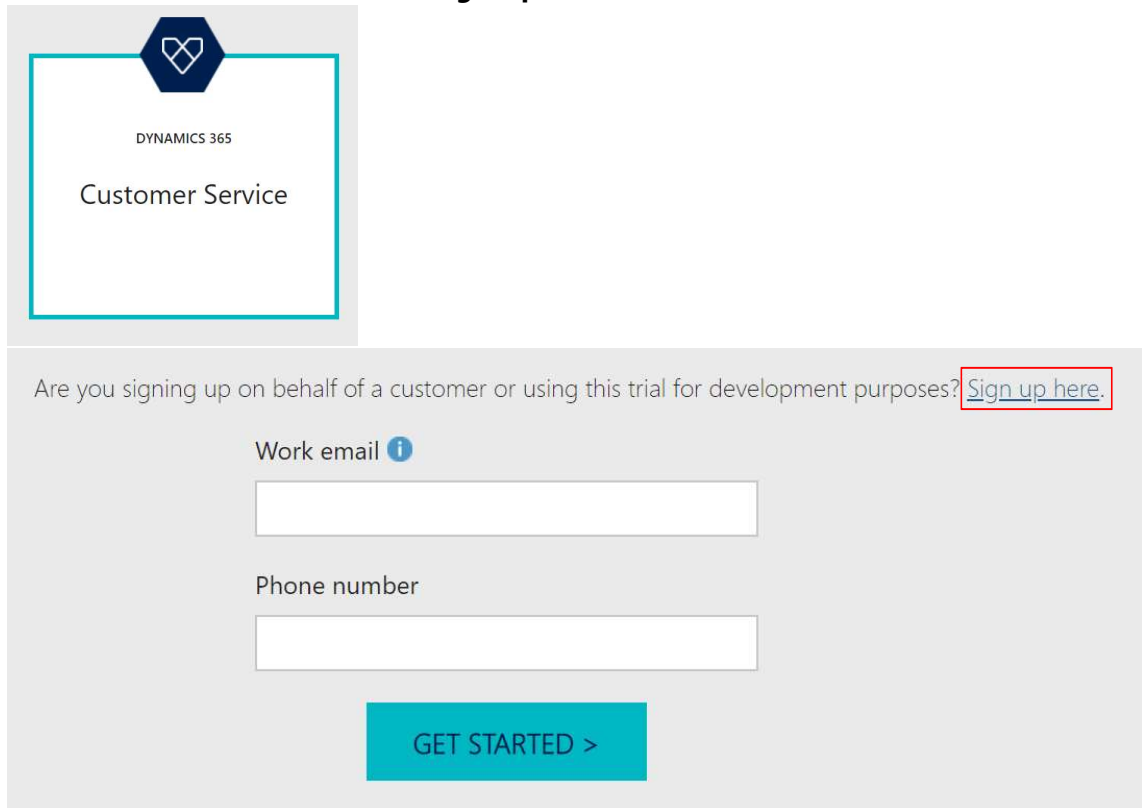
Prerequisites: Customer Insights Onboarding

In this lab you will sign-up for a Customer Insights instance and review the guided demonstration tour to familiarize yourself with the application.

Task 1 – Sign-Up for Dynamics 365 Customer Service Trial

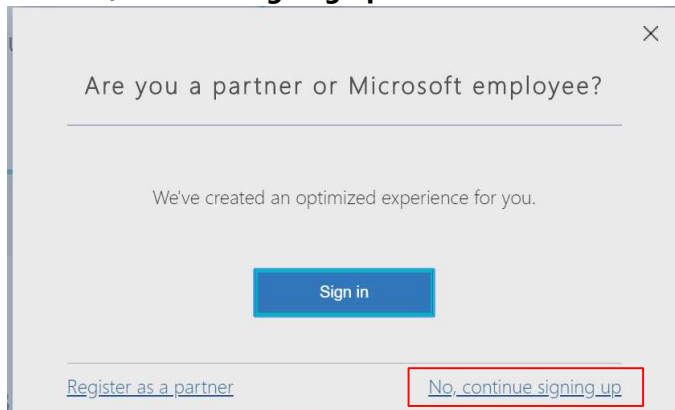
Note: If you already have an existing trial, sandbox or demo tenant that you can utilise, with a Customer Service instance available, you may be able to bypass this step.

1. Open a browser and navigate to: <https://trial.dynamics.com>
2. Select **Customer Service** and click **Sign-Up here**



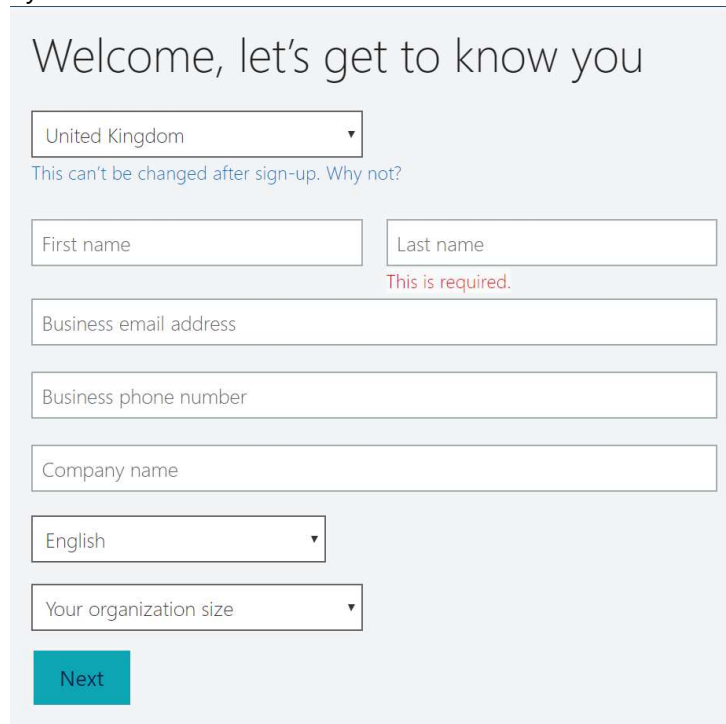
The screenshot shows the Dynamics 365 Customer Service sign-up page. At the top, there is a blue hexagonal icon with a white heart shape inside, followed by the text "DYNAMICS 365" and "Customer Service". Below this, there is a question: "Are you signing up on behalf of a customer or using this trial for development purposes?" with a red box around the link "Sign up here.". Underneath, there are two input fields: "Work email" with an information icon and "Phone number". At the bottom, there is a blue button labeled "GET STARTED >".

3. Click **No, continue signing up**



The screenshot shows a dialog box with the title "Are you a partner or Microsoft employee?". Below the title, there is a line of text: "We've created an optimized experience for you." At the bottom, there is a blue button labeled "Sign in". Below the button, there are two links: "Register as a partner" and "No, continue signing up", with the latter link highlighted by a red box.

4. The details on the next page will be used in the generation of your Trial Office 365 tenant and Dynamics 365 instance.



Welcome, let's get to know you

United Kingdom ▼
This can't be changed after sign-up. Why not?

First name Last name
This is required.

Business email address

Business phone number

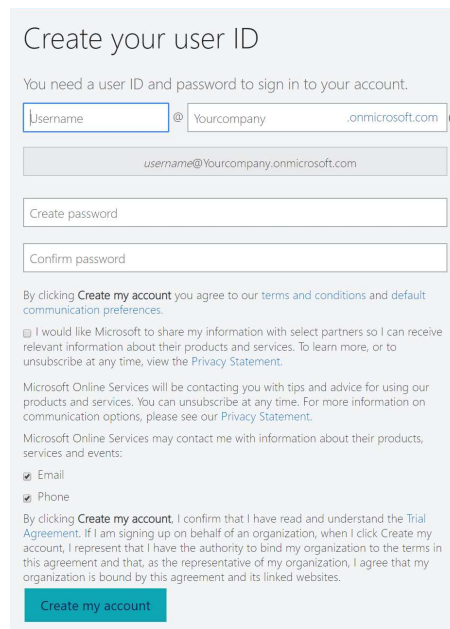
Company name

English ▼

Your organization size ▼

Next

5. On the next page, provide a **username** and **fictional company name**. The username will become the Administrator for your Trial tenant and the fictional company name the Company Name for your tenant. (e.g. admin@mycompany.onmicrosoft.com). Provide a password and then click **Create**.



Create your user ID

You need a user ID and password to sign in to your account.

Username @ Yourcompany .onmicrosoft.com ?
username@Yourcompany.onmicrosoft.com

Create password

Confirm password

By clicking **Create my account** you agree to our [terms and conditions](#) and default communication preferences.

☐ 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, or to unsubscribe at any time, view the [Privacy Statement](#).

Microsoft Online Services will be contacting you with tips and advice for using our products and services. You can unsubscribe at any time. For more information on communication options, please see our [Privacy Statement](#).

Microsoft Online Services may contact me with information about their products, services and events:

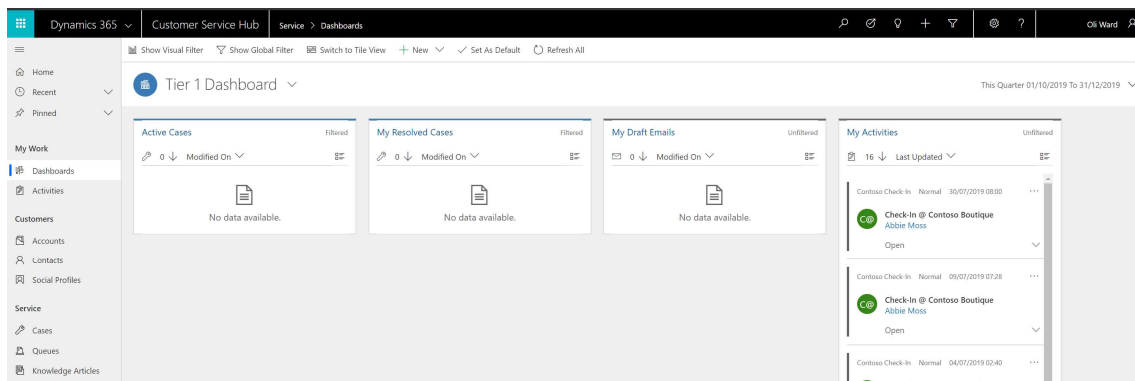
☒ Email
☒ Phone

By clicking **Create my account**, I confirm that I have read and understand the Trial Agreement. If I am signing up on behalf of an organization, when I click Create my account, I represent that I have the authority to bind my organization to the terms in this agreement and that, as the representative of my organization, I agree that my organization is bound by this agreement and its linked websites.

Create my account

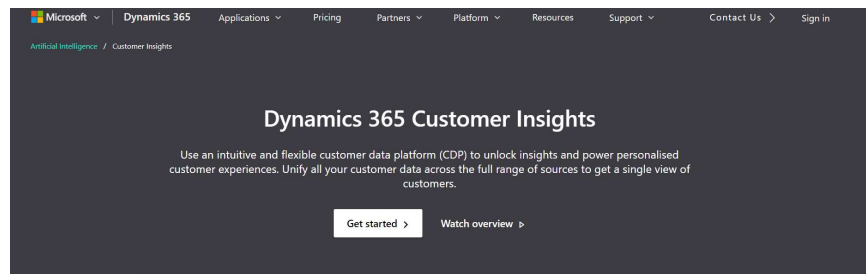
6. If prompted, provide your mobile phone number to receive a validation code via text message. Enter the code your receive into the next page.

7. Optionally, note down your login page (<https://portal.office.com>), username and password – you will need these later. Click **Set Up**.
8. On the **Let's get your FREE 30-day trial setup**, click **Customer Service** and then **Complete Setup**.
9. On completion, you should be signed in to your Dynamics 365 Customer Service trial. Take note of the unique URL for your instance in the format :
(<https://MYORGANISATION.CRM<X>.dynamics.com>)



Task 2 – Sign-Up for Customer Insights Trial

1. Open a browser and navigate to:
<https://dynamics.microsoft.com/ai/customer-insights/>
2. Click **Get Started**



3. Under *Prefer to get started on your own?* Click **Sign up for a free trial**.
Note: If you're a Microsoft Employee or Microsoft Partner, you can access Customer Insights through the PartnerSource and Microsoft Sign-In links on this page.

Discover how Dynamics 365 Customer Insights can transform the way you engage customers

Whether you want hands-on experience in a trial environment or a live demo by a solution expert, we're ready to help you explore and evaluate Dynamics 365 Customer Insights.

Dynamics 365 sales representatives can:

- Provide a live demo or assist you with setting up a free trial.
- Connect you with a Microsoft partner who can provide business applications expertise and industry solutions.
- Discuss how you can personalise engagement with insights from unified customer data.

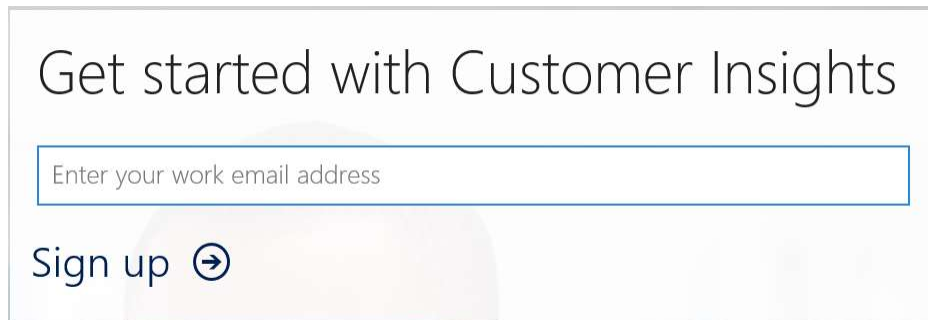
Prefer to get started on your own? [Sign up for a free trial.](#)

If you're a Microsoft partner, get access to environments through [PartnerSource](#).

Microsoft employees, [sign in now](#).

4. On the **Get started with Customer Insights** page, sign-up with the account from your Dynamics 365 Customer Service Trial (e.g. admin@mytenant.onmicrosoft.com) – unless adding to your corporate tenant.

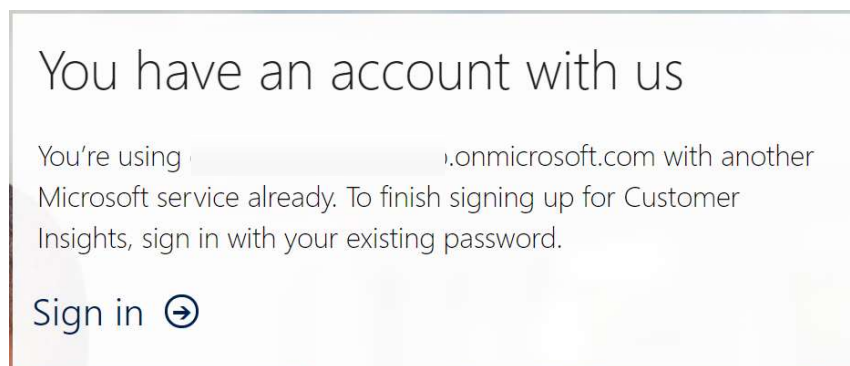
Note: this will need to be an address associated with an Office 365 Tenant, within which a Customer Insights Trial will be provisioned.



Get started with Customer Insights

Sign up ➔

You will be prompted that your address is in use with another Microsoft Service and asked to sign-in instead. – Provide your password as prompted.



You have an account with us

You're using .onmicrosoft.com with another Microsoft service already. To finish signing up for Customer Insights, sign in with your existing password.

Sign in ➔

5. On the **Almost there...** page click **Continue**.

- On the **Create an environment** page, provide a Display Name for your Customer Insights instance. And select the Region into which to deploy the instance.

Create an environment

To bring in your company data, you'll need to create an environment.

Display name *

You can change this later.

Region *

North America

Type

Trial

Create

- This will progress you to the Customer Insights home page - <https://home.ci.ai.dynamics.com>. Congratulations! You should be signed into Customer Insights! Note that you will have access to two environments – a Demo environment and the one that you have provisioned.

