Dynamics 365 Customer Insights

Customer Insights in a Day

Hands on Lab Guide

Module 2: Dynamics 365 and Model Driven Apps

V1.1, July 2019

Microsoft

Contents

Feedback

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Module Two Introduction

Having successfully ingested Contoso Coffee's data sources and created a Unified Customer Profile and calculated key measures. You are now able to leverage the insight you have generated to empower different personas within Contoso Cofee.

Empower Customer Service Advisers

As Project Manager for Contoso Retail, you need to empower Contoso Coffee Customer Service Advisors to deliver the best possible experience to customers, in order to achieve the best possible customer satisfsction (CSAT) scores.

In this Module you will deliver insights to Contoso CSAs within their existing Customer Service application (Dynamics 365 for Customer Service) including: Unified Profile, KPIs and Active Segments from Customer Insights.

To do this you will configure the Customer Insights Customer Card Add-In to embed unified and enriched customer data from Customer Insights on the Contact form within Dynamics 365 for Customer Service.

Objectives

- Configure Activities within Customer Insights
- Configure Customer Insights Customer Card Add-In

Prerequisites

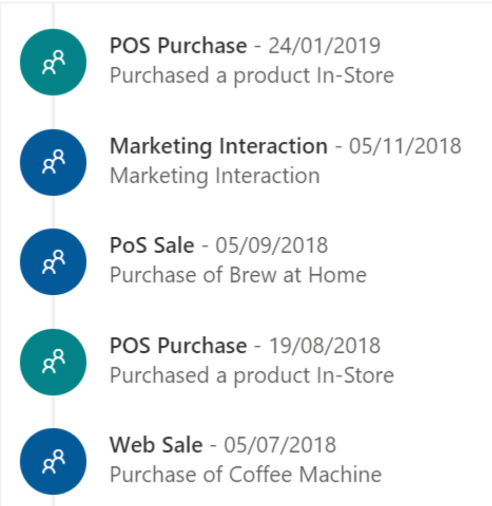
In order to complete this lab you will need

- Completed Module 1 – Data Ingestion and Unification
- Dynamics 365 for Customer Service or Dynamics 365 for Sales (v9.0+)
  (You can request a trial here)

Lab 7 – Embed Customer Insights into Dynamics 365

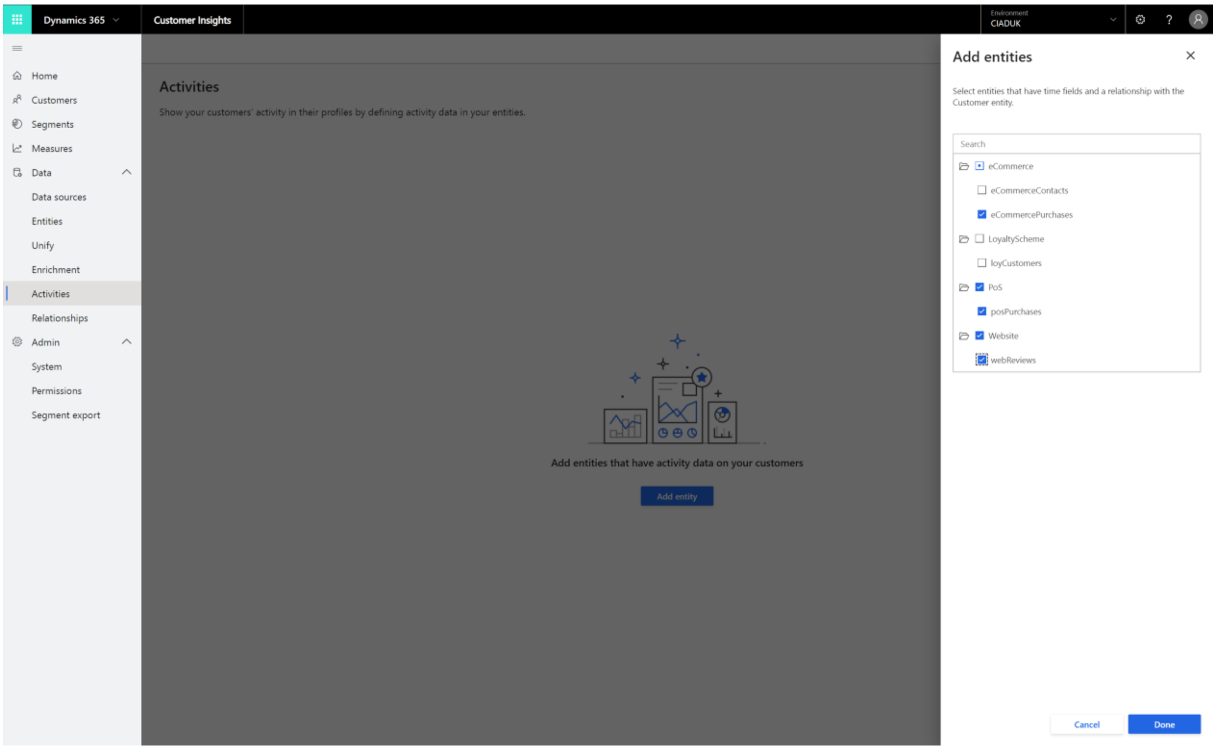
Task 1 – Configure Activities

The Activities capability helps consolidate customer activities from various data sources. This creates a customer timeline view of all customer interactions against your unified customer profile. Business analysts can configure activities to be displayed on a customer dashboard with a timeline view, which can be embedded in business applications.

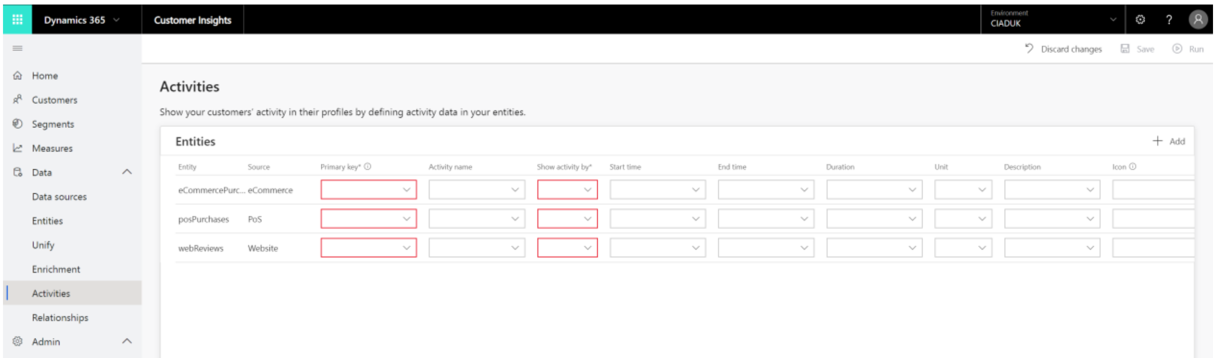


Interactions are any customer touch points – these could include purchases, customer service cases, emails, phone calls, branch visits, web, social activity. In other scenarios interactions could also be data gathered from connected devices, withdrawals or deposits in banking, entry/exist of a premises or area etc.

1. Within Customer Insights, Expand **Activities** on the left menu and click '**add entity**'
2. On the **add entities** fly out, select **eCommercePurchases, posPurchases** and **webReviews.** Then click **Done.**



3. Back on the Activities page, you should now see your selected entities listed. Here we must select the properties from each interaction type to define them as an activity.



- **Entity** (no selection is needed): Specifies your chosen entity's name.
- **Source** (no selection is needed): Specifies your chosen entity's data source name.
- **Primary key**: This field will be used to distinguish between all of your entity's records. This field should not contain any duplicate values, null values, or missing values. Options include **ActivityID**, **SessionID** and **OrderID**, but there are many others.
- **Activity name**: Select the specific field that includes data on your activity.
- **Show activity by**: The timeline grid is sorted by date in descending order (from newest to oldest). Decide if you want to show the activity by Start or End time for it to be placed correctly on the timeline. Using this field, choose which of the two options will serve as the primary method for placing the activity on the timeline grid. (In the following example, Start Time was chosen as the primary method.)
- **Start time or end time:** Depends on your previous selection. At this point, you should select the field that represents the start/end time. Only one field is required, but you can select both times if those are known for your activity.
- **Duration**: Select the field that represents the duration of your activity.
- **Unit**: Select the unit of time for the duration of your activity.
- **Description**: Select the field that represents a description of the activity
- **Icon**: You can add an icon to easily distinguish this activity on the timeline. You can add an icon to your activity if it's publicly available. A URL address or Unicode is required.

4. Complete the values as per the below table to map as an activity

Entity	Primary Key	Activity Name	Activity Time	Start Time	Description	Icon
eCommercePurchases	PurchaseId	ActivityTypeDisplay	Start time	Purchase On	Subject	Link

posPurchases	PurchaseId	ActivityTypeDisplay	Start time	Purchased On	Subject	Link
webReviews	ReviewId	ActivityTypeDisplay	Start time	Review Date	Review Text	

5. Next Save your activity definitions and choose run to collate them as activities. Click **Save** and **Run**.

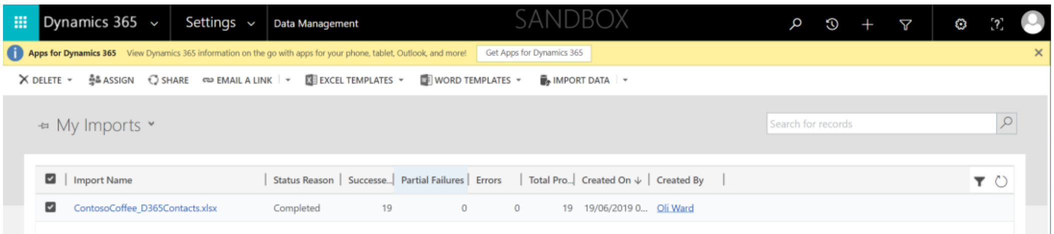
Task 2 – Ingest Dynamics Contact Data

The Customer Insights Cards embedded within Dynamics 365, utilize the Contact ID from Dynamics to identify which profile data to display. In this task you will consume Customer data from Dynamics 365 into Dynamics 365 Customer Insights and Map, Match and Merge it with the existing data-set from Module 1.

Import Contacts into Dynamics 365

First, we will setup some sample Contacts within Dynamics 365 for you to ingest and match against your existing profiles. You will need these contacts for later modules.

1. In a browser, login to your Dynamics 365 Customer Service instance and open the **Customer Service Hub**
2. Click the **Settings** ( ) in the top right-hand corner, then **Advanced Settings**
3. On the page that loads, click the chevron next to **Settings** in the menu bar. Then select **Data Management**
4. On the *Data Management* page, click **Imports**
5. In the menu bar, select **Import Data** to launch the data import wizard.
6. Under **Choose File** select the **ContosoCoffee_D365Contacts.** (from the course content), then click **Next**
7. On the first page, select **Contact** as the entity to import
8. On the mapping page, select **Ignore** for **Full Name** then click **Next,** then **Next** then **Submit** and **Finish**
9. You can monitor the progress of your import, using the refresh button on the top right of the grid. – Ensure that your import completes successfully



10. Reopen the **Customer Service Hub App** and navigate to **Contacts**
11. Open the record for **Abbie Moss**. Click on the Contact image in the top left of Abbies record to edit the image. Upload the **abbiemoss.jpg** file from the course content.

Ingest

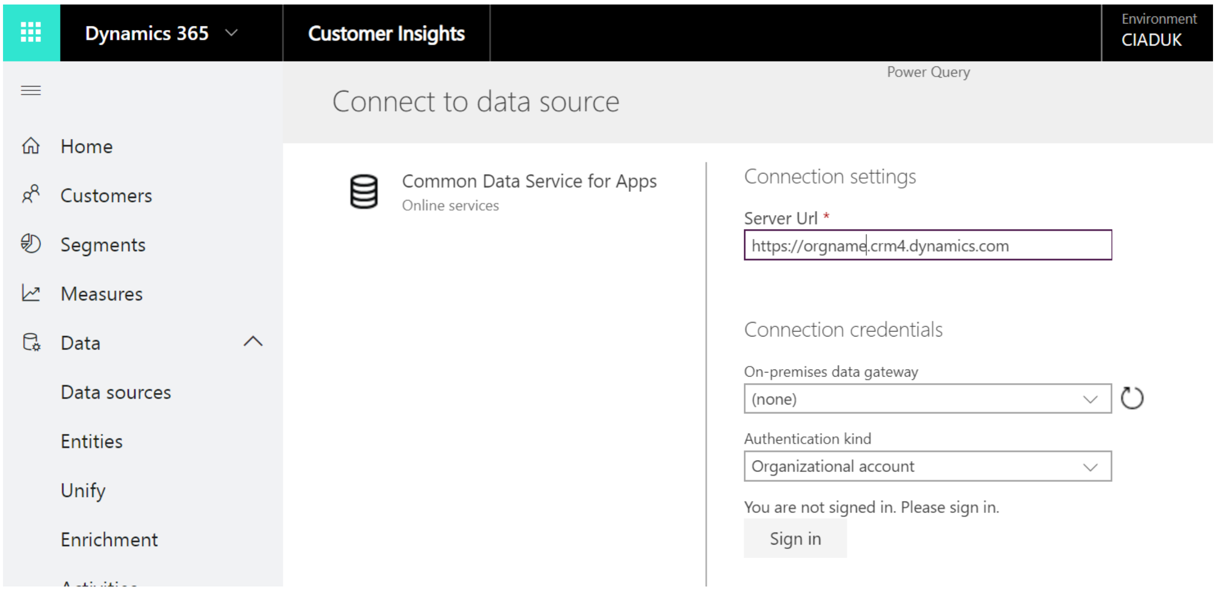
Now we will ingest the Dynamics 365 contacts as an additional data source within Customer Insights.

1. Click 'Data Sources' in the left hand menu
2. Click +Get data from the top right of the page

3. Name the Data Source 'Dynamics365CustomerServ' Click **Next**

4. On the **Choose Data Source** page, select **Common Data Service for Apps**

5. Add your Dynamics 365 URL (e.g. https://ORGNAME.crm4.dynamics.com) and click **Sign In.** Sign In with the credentials that you use to access Dynamics 365.

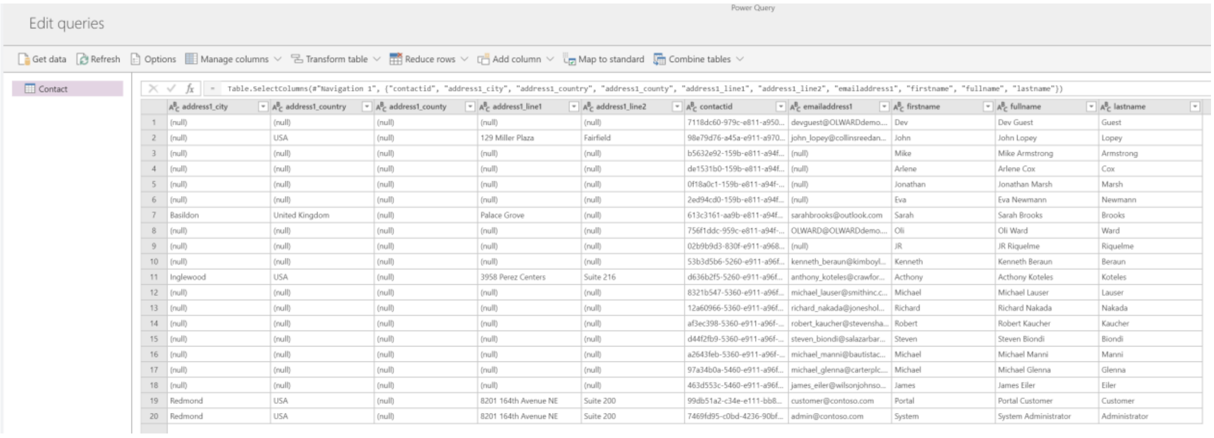


6. Click **Next**

7. Expand the **Entities** Folder and select the **Contact** table then click **Next**

8. On the Edit Queries Page, you have an opportunity to limit the columns that you wish to ingest.
Click **Manage Columns → Choose Columns.** Unselect all the columns, then choose to include only the following:

- contactid
- address1_city
- address1_country
- address1_county
- address1_line1
- address1_line2
- address1_postalcode
- address1_stateorprovince
- emailaddress1
- entityimage_url
- entityimageid
- firstname
- fullname
- gendercode_display
- lastname
- telephone1



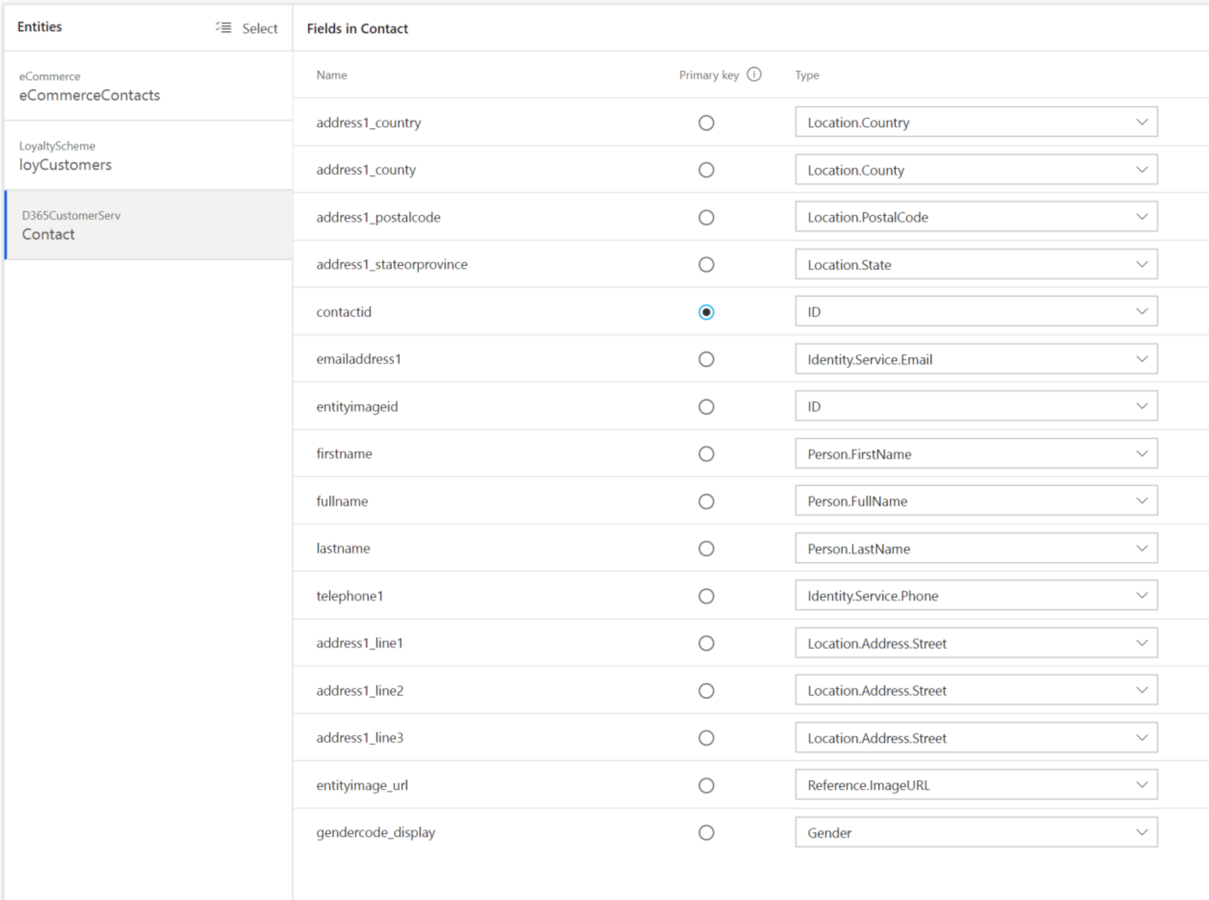
9. Then click **Create.**

Map

1. Click **Unify → Map**
2. Under **Entities** click **Select**
3. Check the box for **Contact** under **D365CustomerServ**
4. Under **Entities** click the D365CustomerServ Contact item.
   As when you ingested Loyalty and eCommerce data, you should see that Customer Insights has intelligently mapped the attributes to the Common Data Model types.
5. Click **Edit** in the top right hand corner and ensure that all attributes are included.
6. Where an attribute hasn't been mapped to the Common Data Model, map as follows

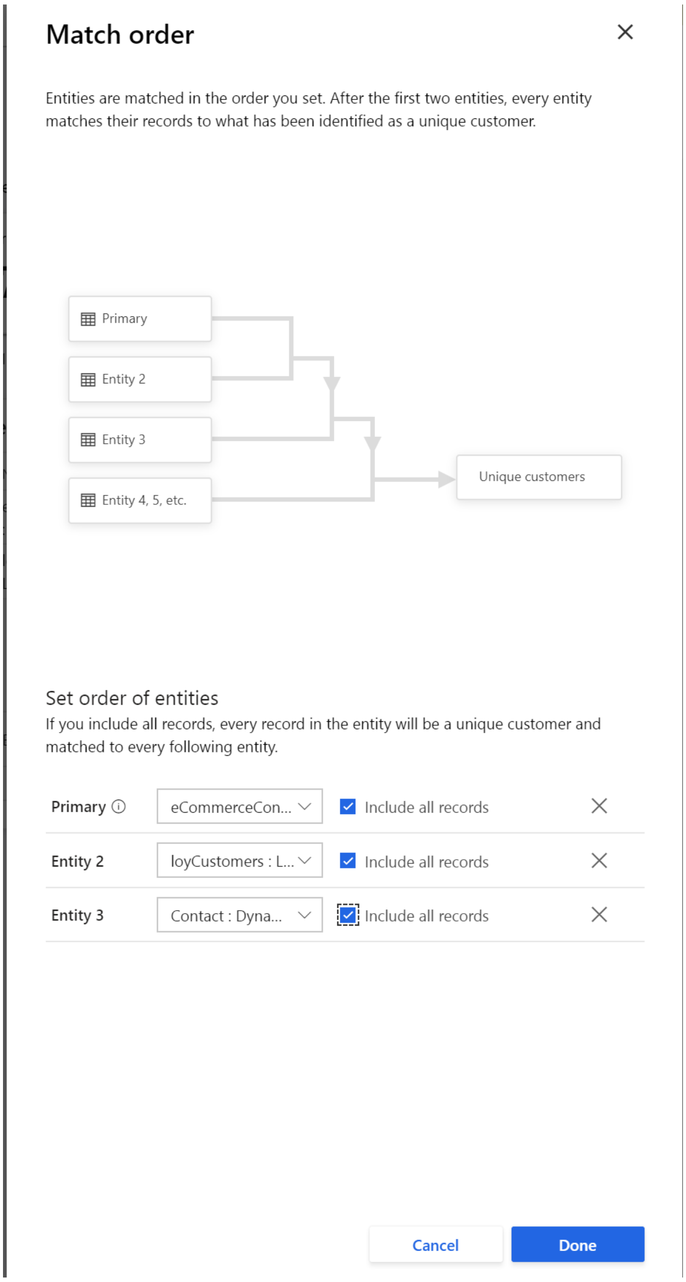
Column Heading	New Data Type
telephone1	Identity.Service.Phone
Address1_line1	Location.Address.Street
Address1_line2	Location.Address.Street
Address1_line3	Location.Address.Street
entityimage_url	Reference.ImageURL
Entityimageid	ID
gendercode_display	Gender

7. Select **contactid** as the Primary Key
8. Click **Save**



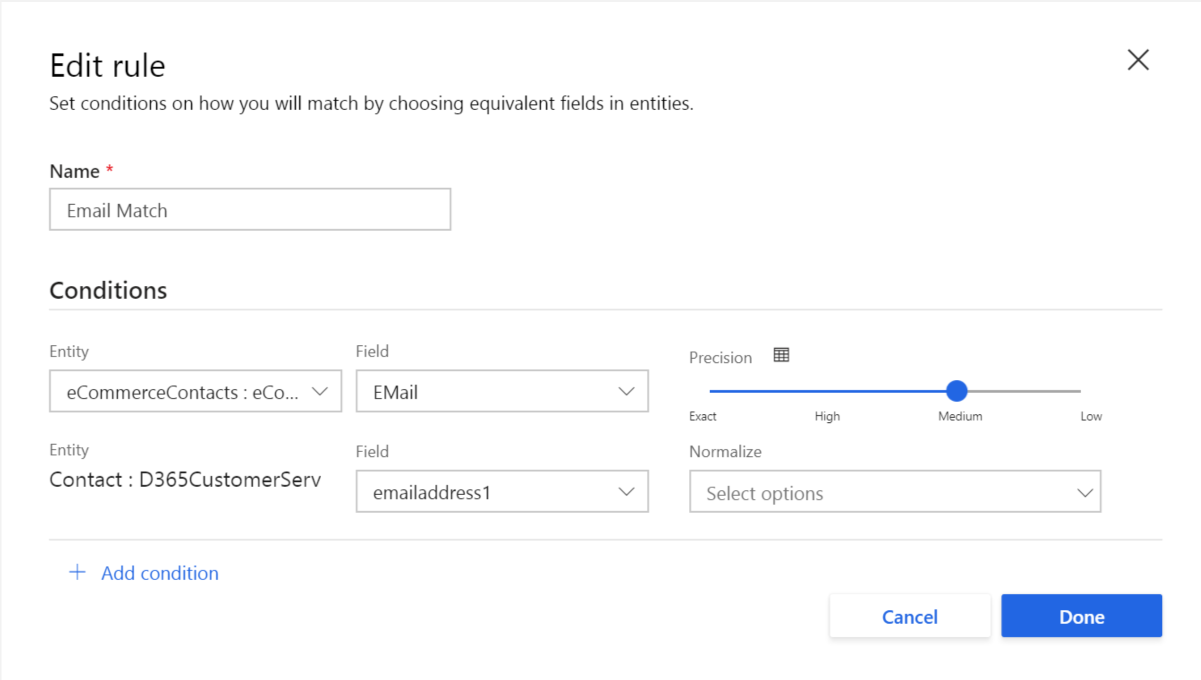
Match

1. Click **Unify → Match**
2. Click **Edit** next to **Match Order**
3. **Add Entity** and select *Contact : Dynamics365CustServ* and check **Include All Records** and then click **Done.**



4. You will see that this new addition required a new rule. Click **Create New Rule.**

5. Name the Rule **Email Match**
   For the conditions, select
   - Entity as **eCommerceContacts** and Field as **EMail**
   - Entity as **Contact : D365CustomerServ** and Field as **emailaddress1**
   - Set the Match precision to **Medium** and click **Done.**



6. Click **Save** and **Run**

Merge

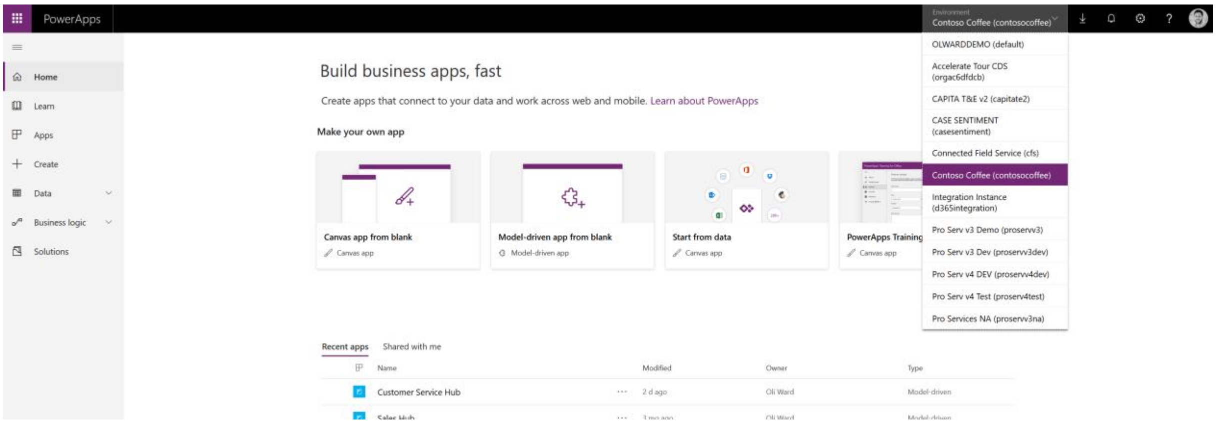
1. Click **Unify → Merge**
2. You should see that Contactid from Dynamics 365 has been added to the list of attributes that will make up the Unified Profile
(Note, if this attribute has been merged, do separate it)
3. You can **optionally** add the remaining attributes and identify them as 'Merge' attributes where an attribute already exists (e.g. First Name, Last Name, Full Name, Gender and gerndercode_display).
4. Click **Save** and then **Run**

Task 3 – Install the Customer Insights Customer Card Add-in

The first step is to install the Customer Insights Customer Card Add-In, that will enable you to embed Unified Profile and Insight from Customer Insight, directly within an existing Dynamics 365 experience for Contoso Coffee Customer Service Advisors.

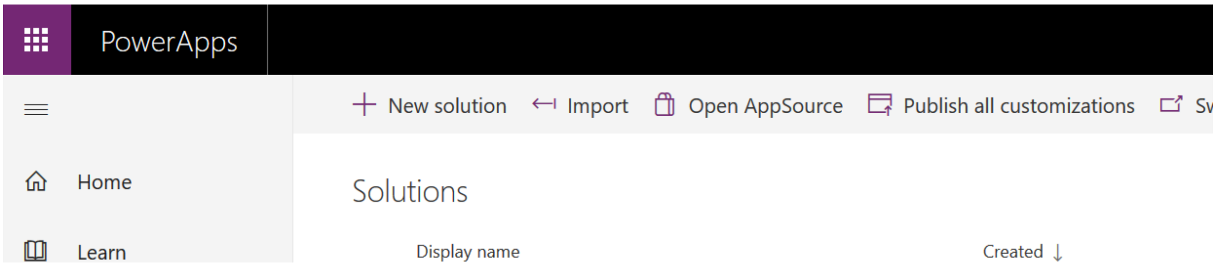
1. Log in to your Dynamics 365 for Customer Service instance.
   Note: If you do not have an instance that you can use, you can sign-up for a trial here. – https://trials.dynamics.com.

2. Navigate to https://powerapps.microsoft.com and select your Dynamics 365 for Customer Service instance from the **Environment** drop down

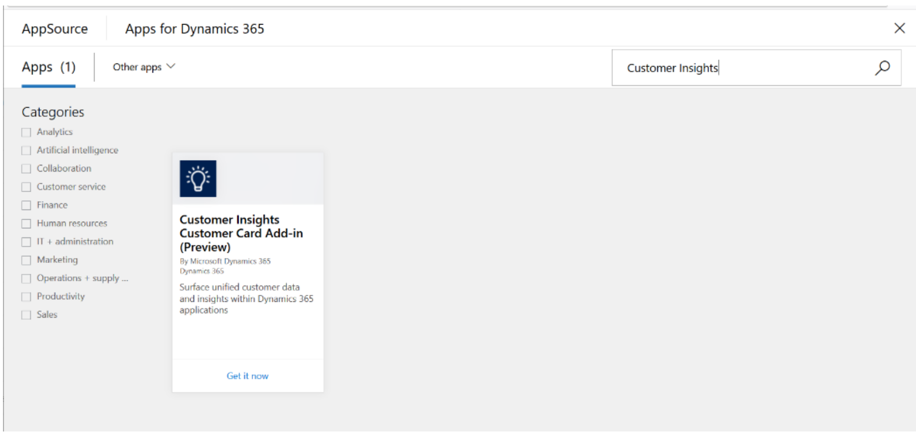


3. Once selected, click **Solutions** on the left-hand menu.

4. Click **Open AppSource** from the top of the page

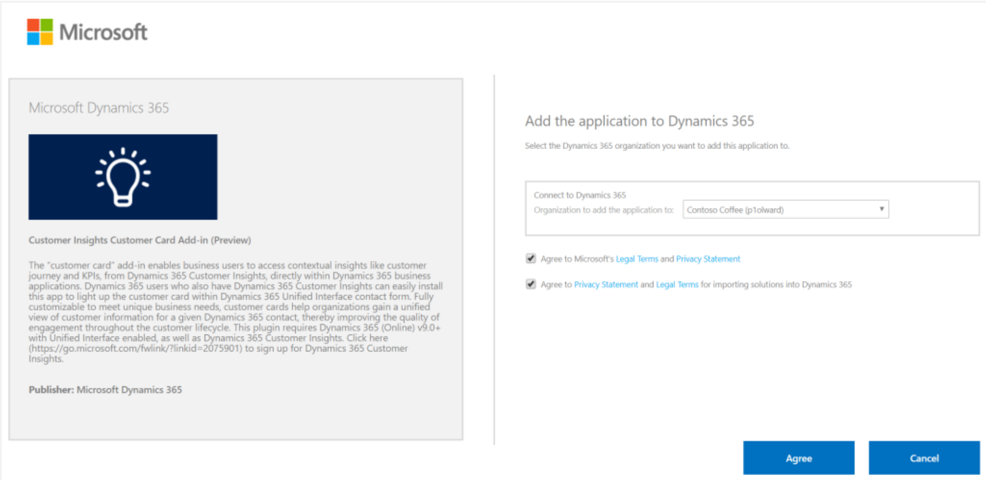


5. On the AppSource window that opens, search **Customer Insights.** You should see **Customer Insights Customer Card Add-in** in the results. Click **Get it now.**

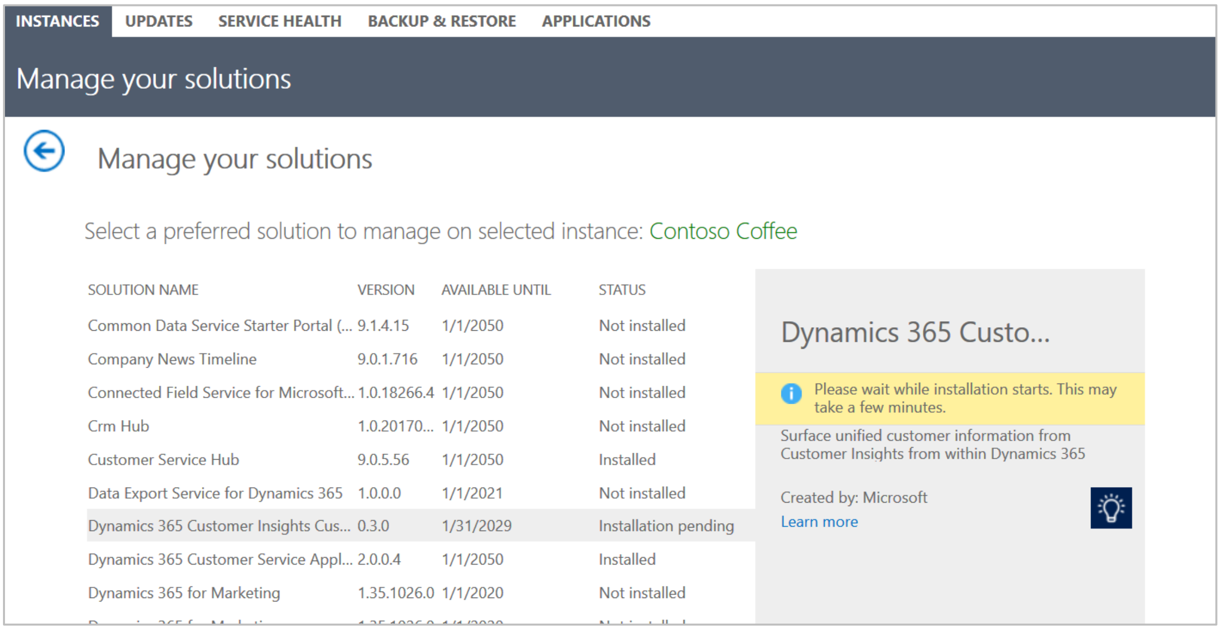


6. Complete your details on the **One more thing…** page. Including **Name, email,** and **Phone Number**. Then provide your consent and click **Continue.**

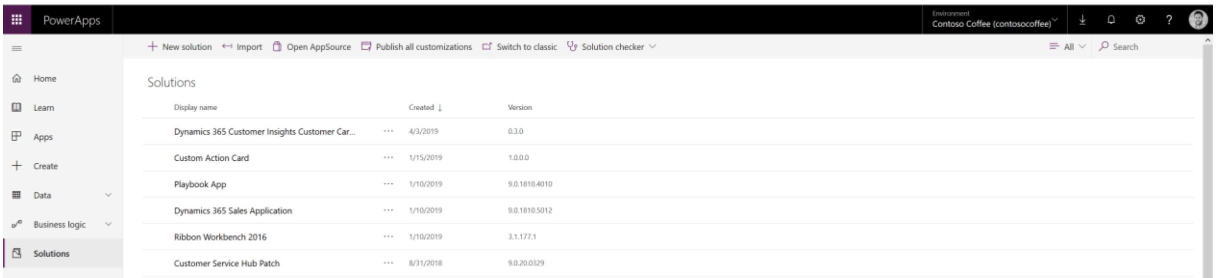
7. On the next page you should see details of the Customer Inisghts Customer Card Add-In. To the right you can select the Dynamics 365 instance into which you wish to install the solution. **Select your preferred instance, Agree to the Legal Terms** and **Privacy Statement** then click **Agree.**



8. This will begin the installation process. You can check the status of the install on the page that opens. (You may need to refresh it for updates).

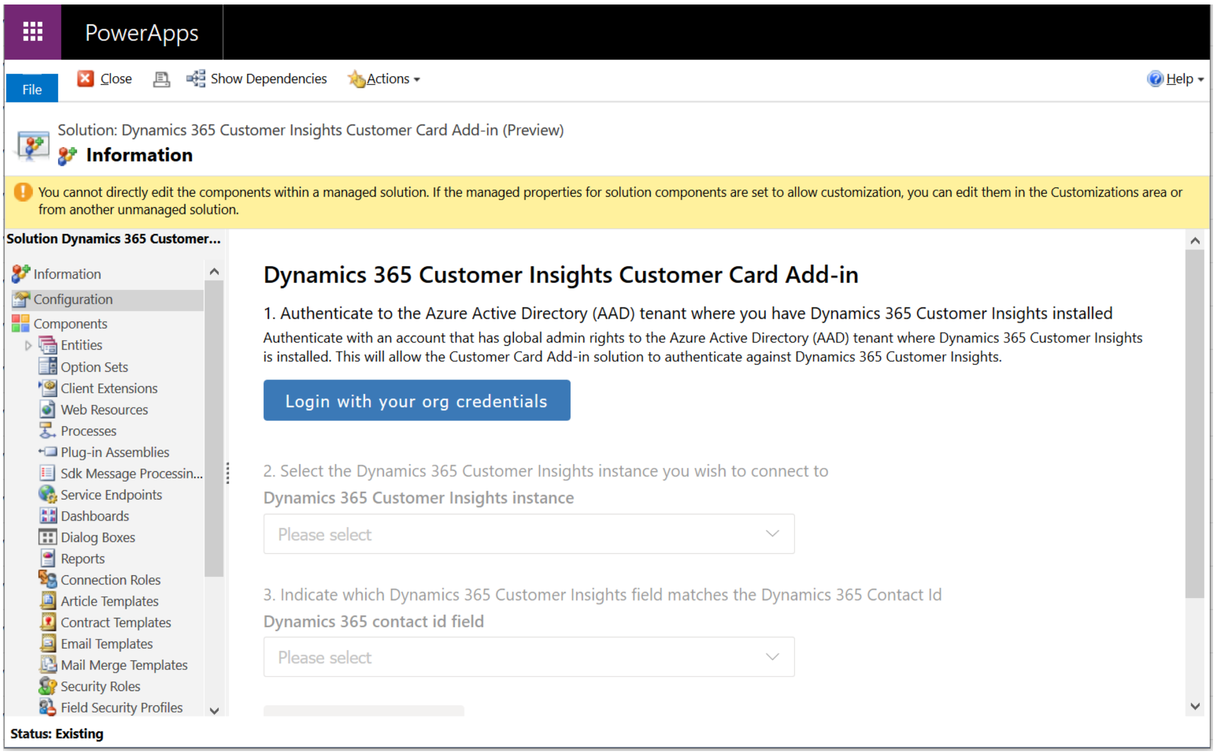


9. Once installation is complete, you can close this browser tab and return to the **solutions** area on https://powerapps.microsoft.com, where you should see the **Dynamics 365 Customer Insights Customer Card Add-In** installed.



10. Click **Switch to Classic** at the top of the page

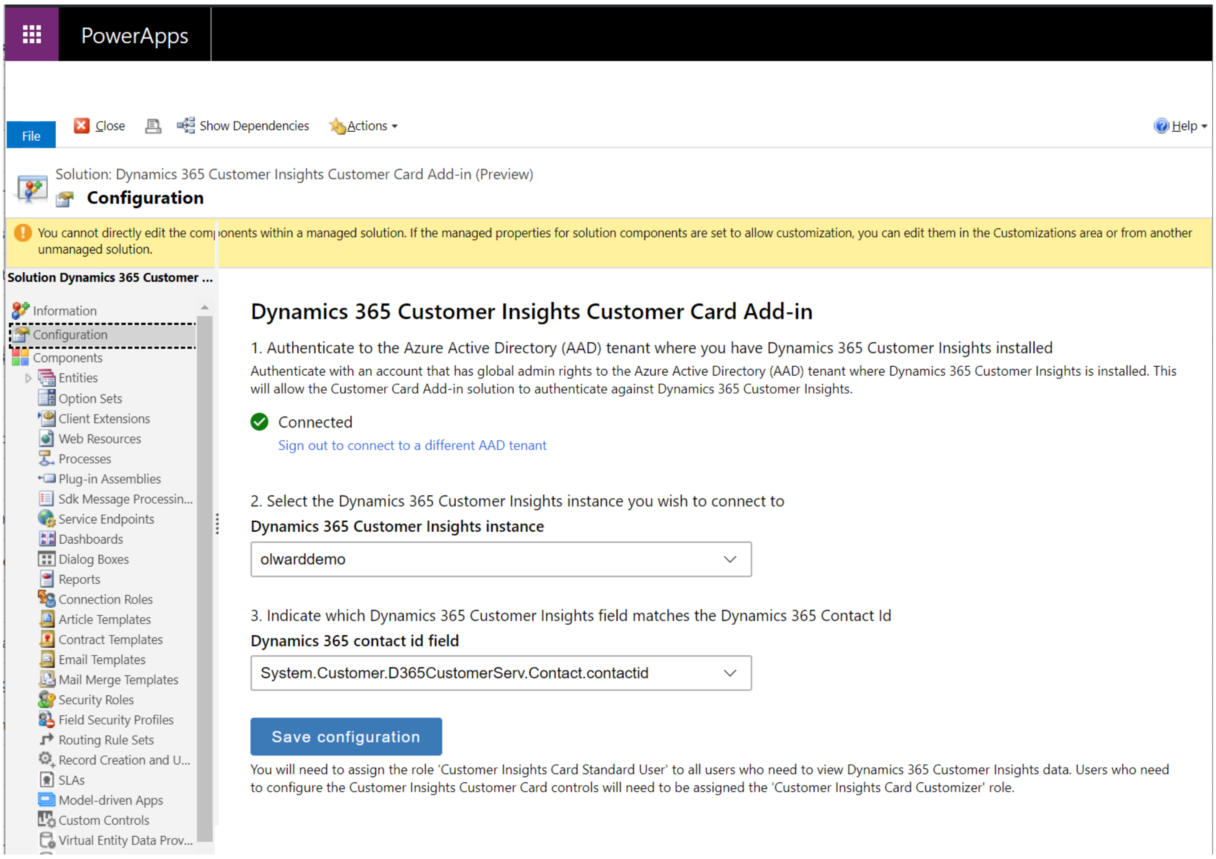
11. Double click the **Dynamics 365 Customer Card Add-In** solution. You should see the **Configuration Page**. If not, click **Configuration** from the left menu.



12. Click **Login with your org credentials** and sign-in with your account used for **Customer Insights.**

13. Once connected, select your Customer Insights Instance in the drop down.

14. From the drop-down select the attribute from your customer profile that represents the Dynamics 365 Contact Id. (**System.Customer.D365CustomerServ.Contact.contactid**).



15. Click **Save Configuration**

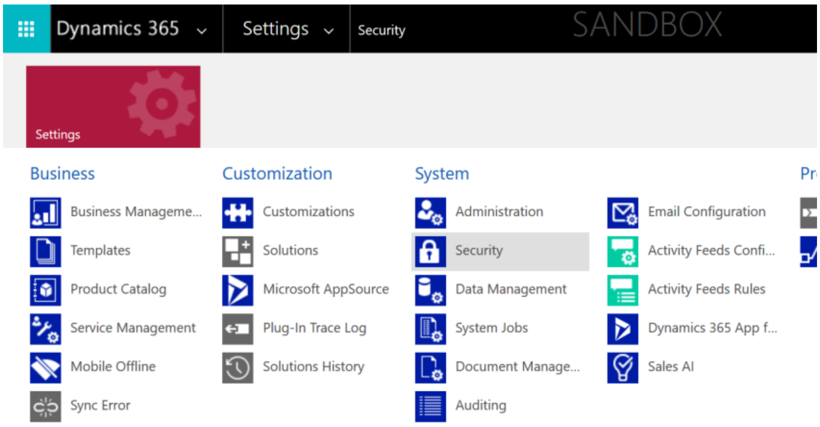
Task 4 – Add Security Roles

For users to either configure or view the Customer Insights content embedded within the Dynamics 365 form, you will need to assign them the appropriate Security Role.

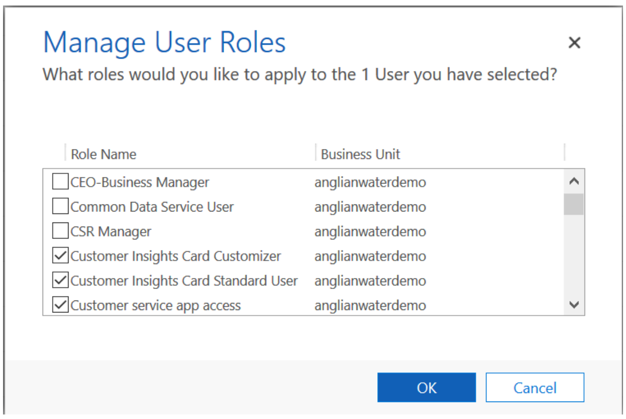
Next you will need to assign the following user roles:

- **Customer Insights Customizer**: Assign this role to the users who will customize the content to be shown on the card for the whole organization.
- **Customer Insights Card Standard User**: Assign this role to the users who will use the card for consumption, but who won't customize it.

1. Open the **Customer Service Hub** app in Dynamics 365 instance. (or Dynamics 365 for Sales). Click the Cog  in the top right-hand corner → **Advanced Settings.** This should open Dynamics 365 classic Web App in a new tab.
2. Click the arrow next to settings and choose '**Security**'



3. Click **Users**
4. Select your user account (and any others that you wish to be able to view or edit Customer Insights Cards). Click **Manage Roles.**
5. Add the **Customer Insights Card Customiser** and **Customer Insights Card Standard User** roles as shown below. And click **OK.**



Task 5 – Add the Customer Insights Customer Card Controls to the Contact Form.

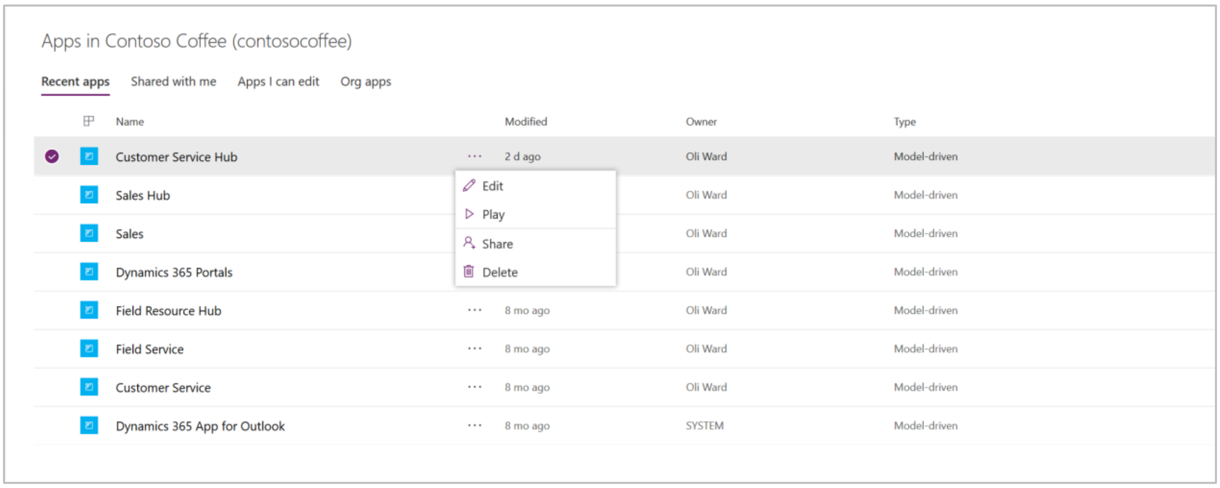
We will now configure a Dynamics 365 Contact form, used by Contoso Coffee CSAs to display the embedded Cards and from Customer Insights.

Note: If you still have the tab open from the previous task and are familiar with the classic Dynamics 365 Customization experience, you can access the 'Customizations' area from your open tab & jump to step 4.

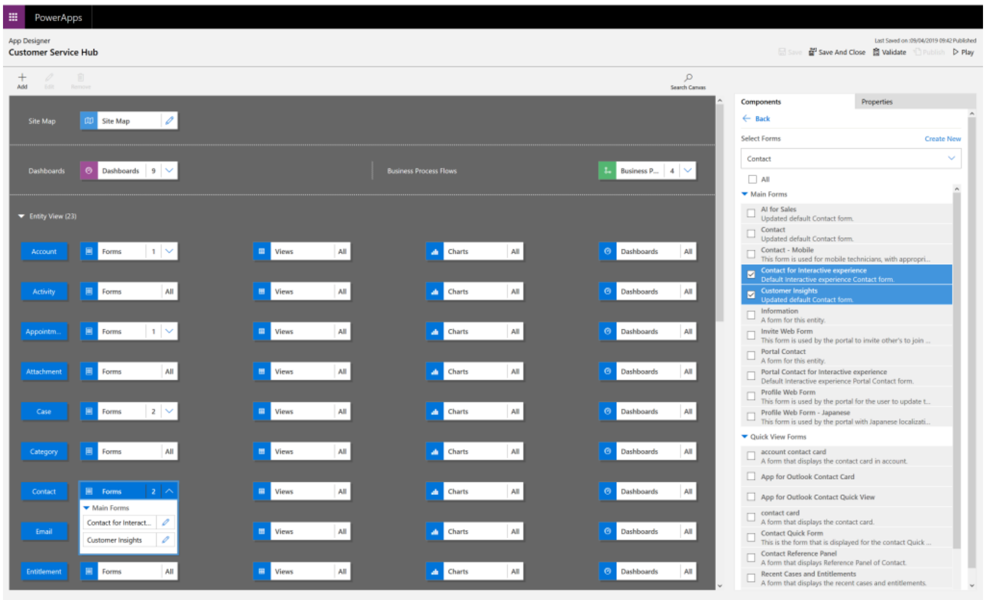
1. Navigate to https://powerapps.microsoft.com and select your Dynamics 365 for Customer Service instance from the Environment drop down
2. Click **Apps** on the left menu. You will be shown a list of apps installed into your Dynamics / CDS instance.

For the next steps we suggest you edit the **Customer Service Hub** app, but you can alternatively use the **Sales Hub** or a custom **Model Driven App** if you do not have this available.

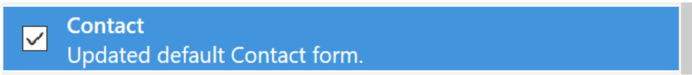
3. Click the **More Commands '…'** button for the **Customer Service Hub** app and click **Edit.**



4. You should now see the PowerApps App Designer has opened. Scroll down and expand the **Forms** menu for the **Contact** entity.

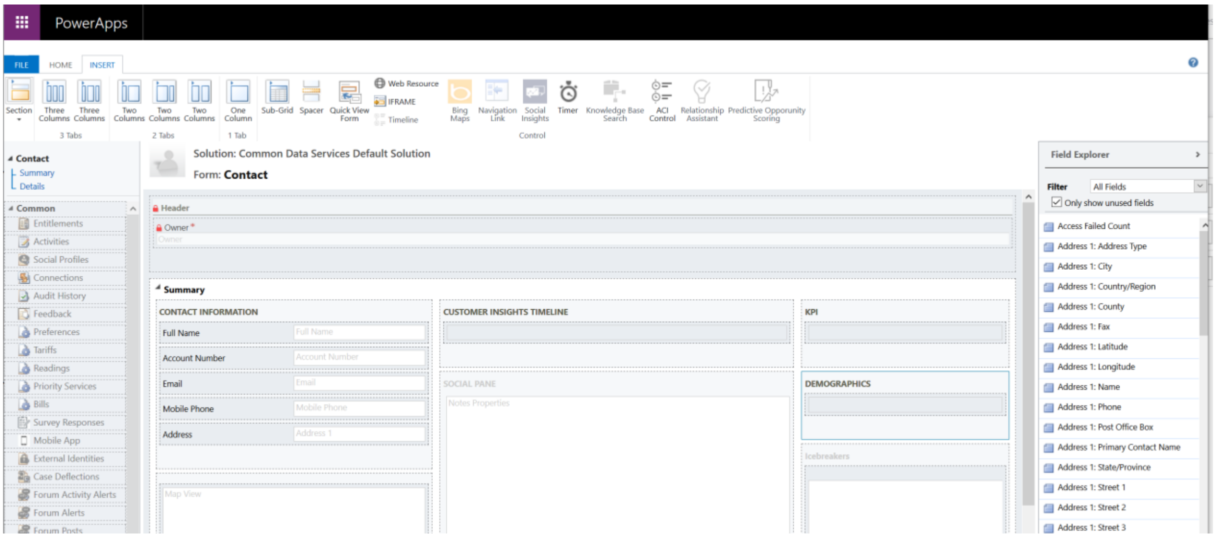


5. Ensure that the default Contact form (**Contact**) is selected and click the edit button (pencil) to edit the form. The button will appear when you hover over the form in the components list

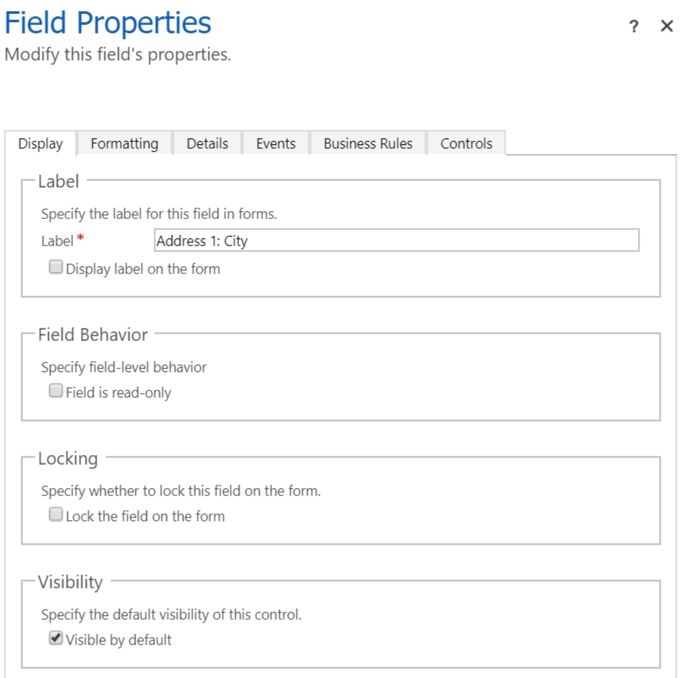


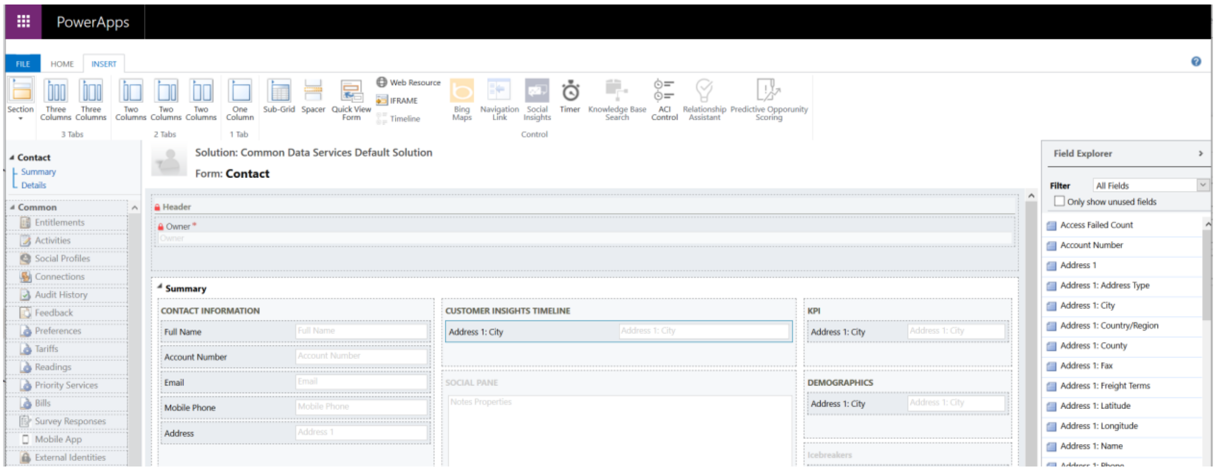
6. You should now be presented with the 'Edit Form' page. Click **Save As** in the top left corner and save a copy of this form, setting the name to **Customer Insights.** Then click **OK.**

7. Add three new sections within the Summary tab. Name them – **CUSTOMER INSIGHTS TIMELINE, KPI** and **DEMOGRAPHICS** as shown below.

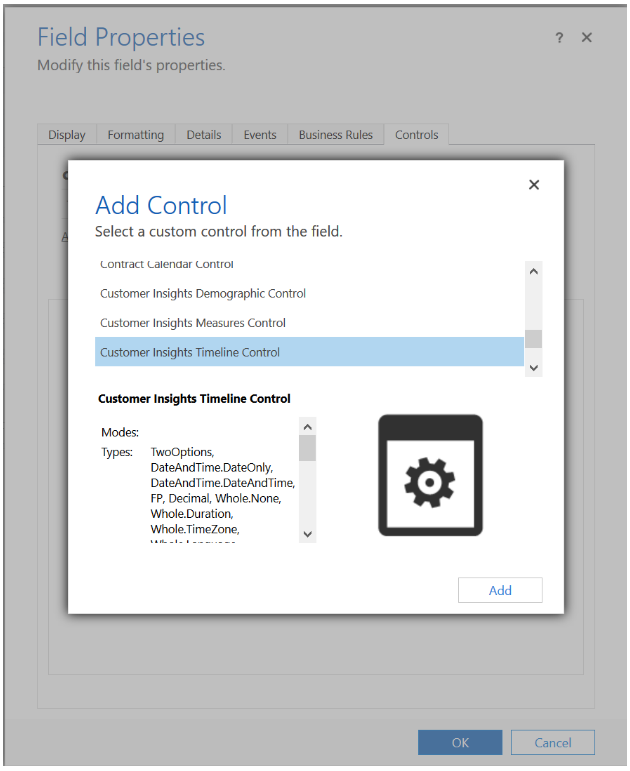


8. Drag a field from the Field Explorer into each section you added. e.g. **Address1_City.** Ensure that the Fields are set to be **Visible** by default, and that the *Display label on the form* **is not selected**

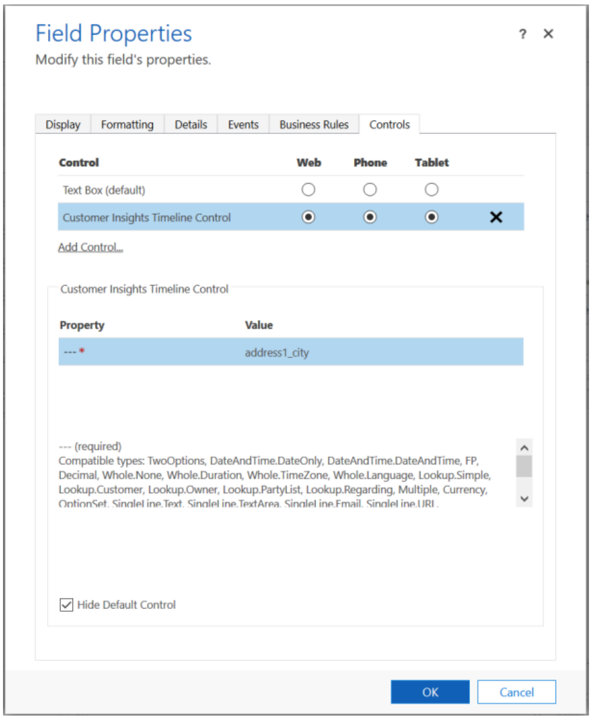




9. Double Click the field you added in the **Customer Insights Timeline** section.
Uncheck the '**Display Label on the Form'** property
Open the **Controls** tab and click **Add Control…**
Scroll down the list and choose **Customer Insights Timeline Control** then click **Add**



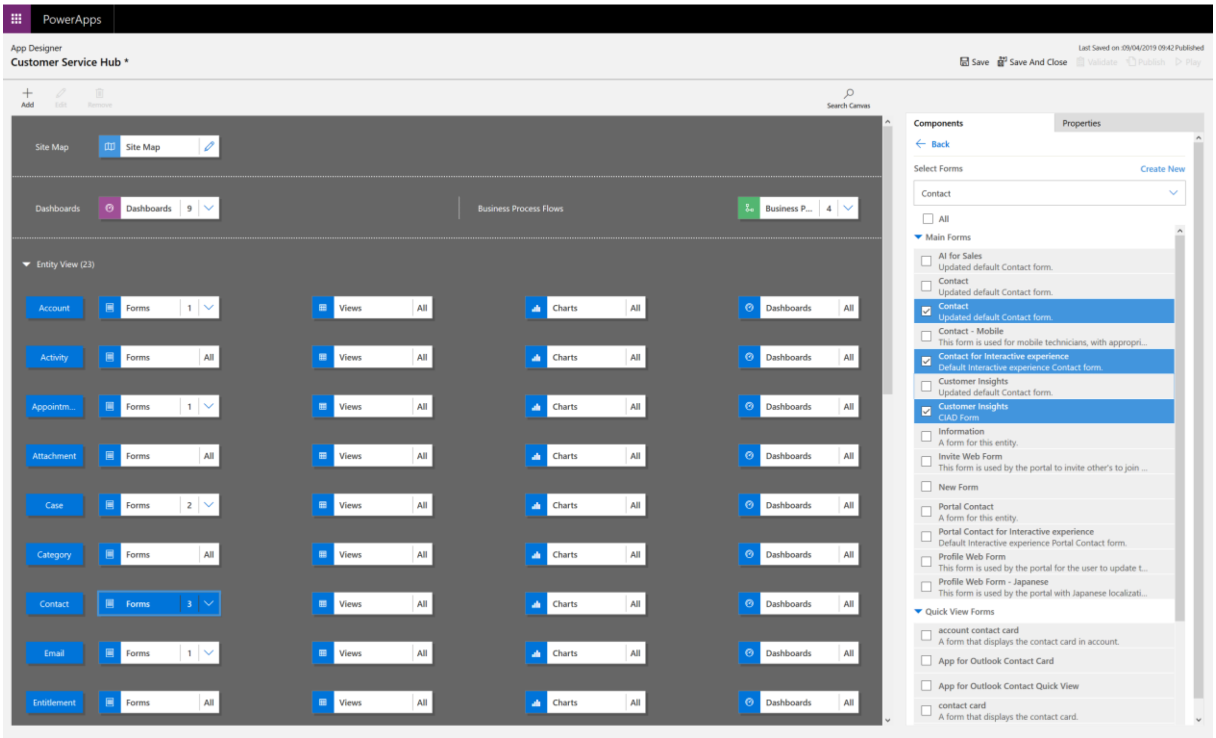
10. Set the control to appear on **Web, Phone** and **Tablet** and check the **Hide Default Control** checkbox.



11. Repeat steps **9** and **10** for the fields added into the **KPI** and **DEMOGRAPHICS** section, adding the **Customer Insights Measure Control** to KPI section and the **Customer Insights Demographic Control** to the Demographics section.

12. Save and Close your form

13. Back on the **App Designer,** select to add your new **Customer Insights** form to the **Customer Service Hub** app.

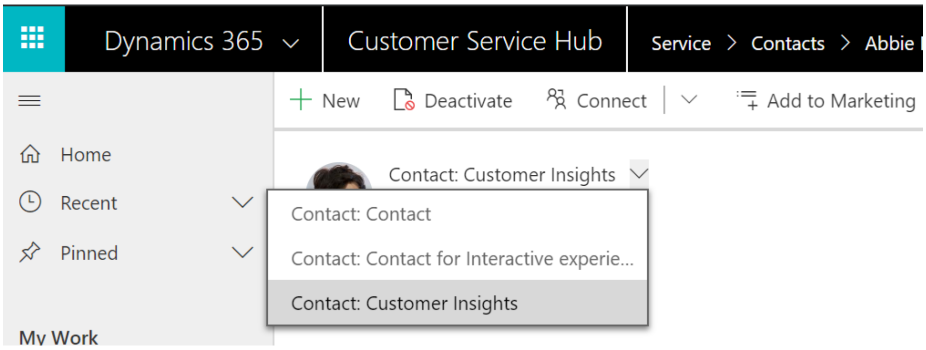


14. Click **Save** in the top right hand corner and then **Publish.**

Task 6 – Configure the Customer Insights Customer Card Add-in

1. Open your Dynamics 365 for Customer Service instance

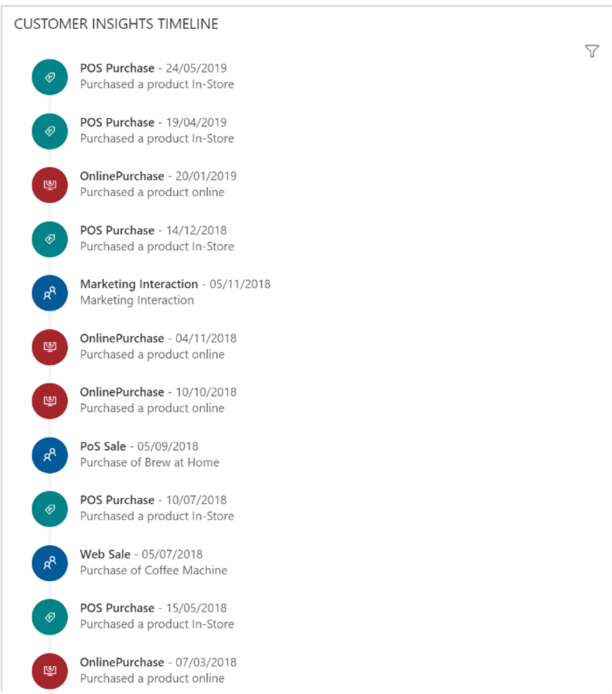
2. Navigate to the Contacts are via the left hand menu. Open the Contact record for Abbie Moss and select your new **Customer Insights** form using the form selector.



3. You should now see that the three Customer Insights you embedded in the form render. But KPI and Demographics control can be configured.

   As you assigned your user the **Customer Insights Card Customiser** security role in Task 5, you can do this. The results of your configuration completed here will be visible for all users with the **Customer Insights Card Standard User.**

Timeline:

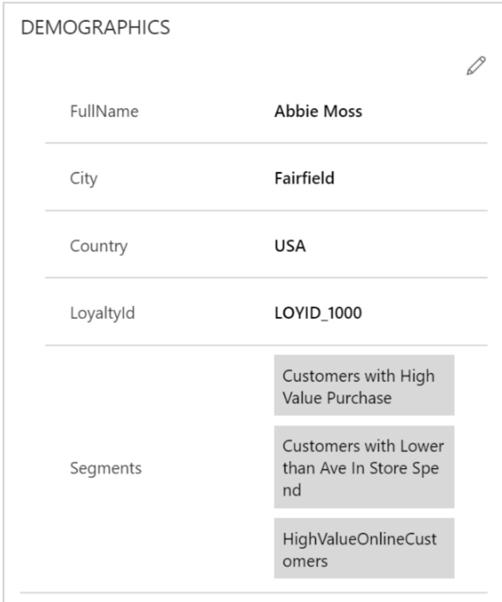


No configuration required. This should display a unified set of ingested activities from Customer Insights.

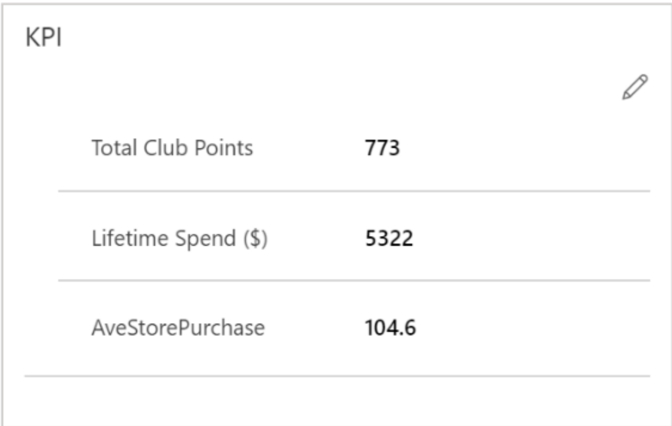
Demographic

The demographic control should display some key information from the Unfiied Customer Profile. Click the **Edit** button to customise the information that appears.

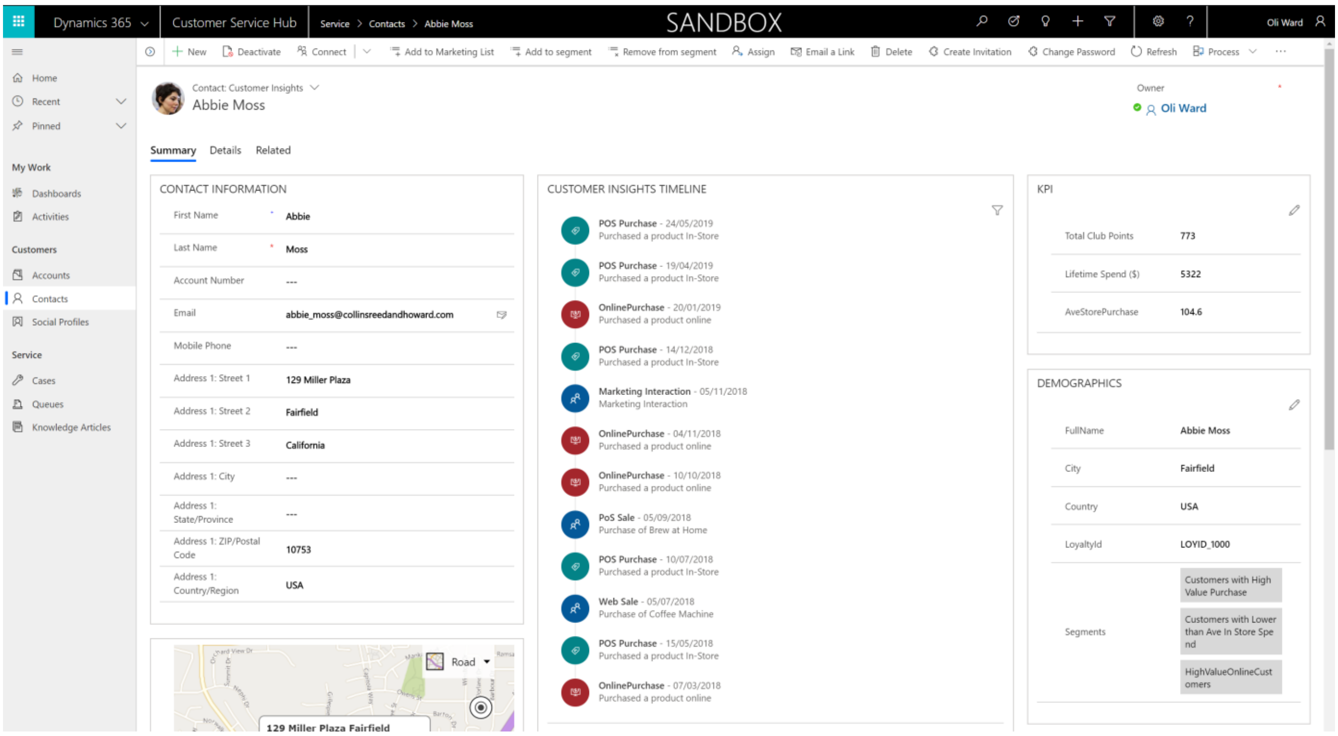
Add the **LoyaltyId**, **Segments** components to have them displayed. Add any additional items that you believe may be helpful to a Customer Service Advisor



KPIs



Click **Edit** on the KPI controls. Here you're able to select from any of the Customer Measures that you created earlier. Add your Customer Measures to give the Contoso Coffee CSA visibility. (**Total Club Poiunts, Lifetime Spend ($)** and **Average Store Purchase ($)**



Your final Contact form should appear similar to that above.
Congratulations! You have successfully completed the objectives of this module, providing Contoso Coffee Customer Service Advisors with visibility of all customer touchpoints and KPIs.