Setup Guide: Power Platform, Microsoft 365 Tenant & Azure Subscription

This guide is intended to help you **set up a clean, isolated training environment** for completing the **Copilot Studio and Extensibility with Azure AI** labs. You will create a trial tenant and configure all required services without affecting your production environment.

🔒 **Important:** Please do **not** use your work or production account.

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Step 1 - Create a new training tenant.

1. Start a trial of Power Apps. Using a ***private browser session***, navigate to
   https://signup.microsoft.com/create-account/signup?products=83d3609a-14c1-4fc2-a18e-0f5ca7047e46&ali=1
2. Follow the wizard to complete the sign-up process.

3. Provide a *personal* email and click **Next**.

Power Apps per user plan Trial
Start your free 1-month trial today

○———————○———————○
About you   Sign-in details   Complete & get started

Let's get you started

Enter your work or school email address, we'll check if you need to create a new account
for Power Apps per user plan Trial.

Email

[   ]

This is required

Next

4. Click on Click **Setup account**.

○———————○———————○
About you   Sign-in details   Complete & get started

Let's get you started

Looks like you need to create a new account. Let's get you started!
Continue as **thaddeusmt@live.com**.

Set up account   **Change my email**
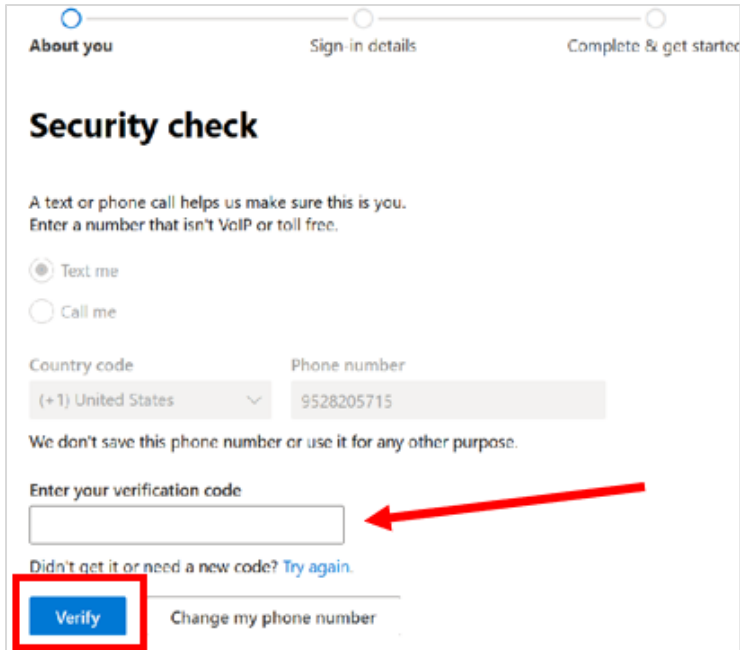
5. Fill in your details and then click **Next**

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

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

8. 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)

9. Enter a P**assword**, **Confirm password** and click **Next** (note your password)


10. You will receive a confirmation email, but please note your username (you'll have something like admin@CIILTLab.onmicrosoft.com). Click **Start Using Power Apps per user plan Trial**
11. **You may need to enter credit card information. This will not charge you and you do not have to worry about cancelling –** *Copy and keep the new login information*

Step 2 - Create a Microsoft 365 Trial

A Microsoft 365 Trial will provide additional apps such as Exchange for email, SharePoint, OneDrive, Teams and more

1. With the user you created login to https://admin.microsoft.com

2. Add a billing address under **Billing > Billing accounts >** Click on your tenant's name > **Edit**
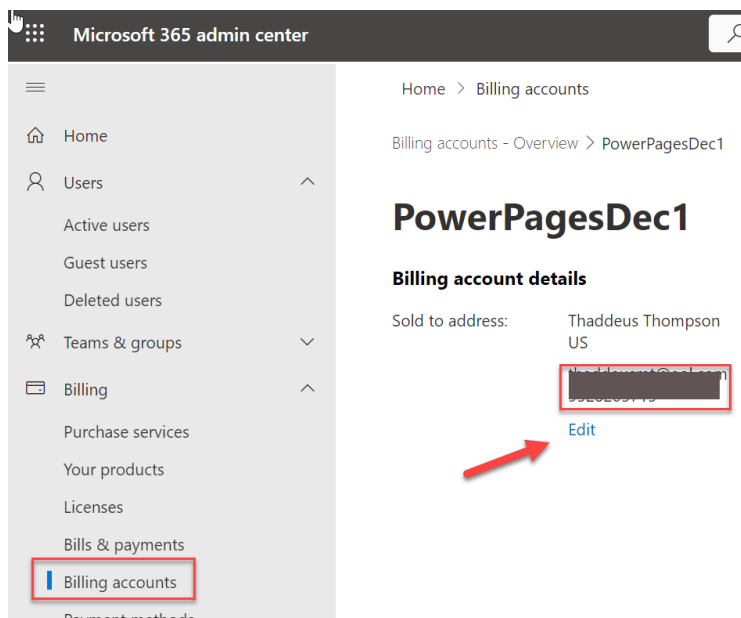
3. Ensure you see or add your name, billing address, email address and click **Save**

4. Click on **Marketplace (or it might say Purchase Services)**, select **All Products,** locate **Microsoft 365 Business Premium**, and click **Details**
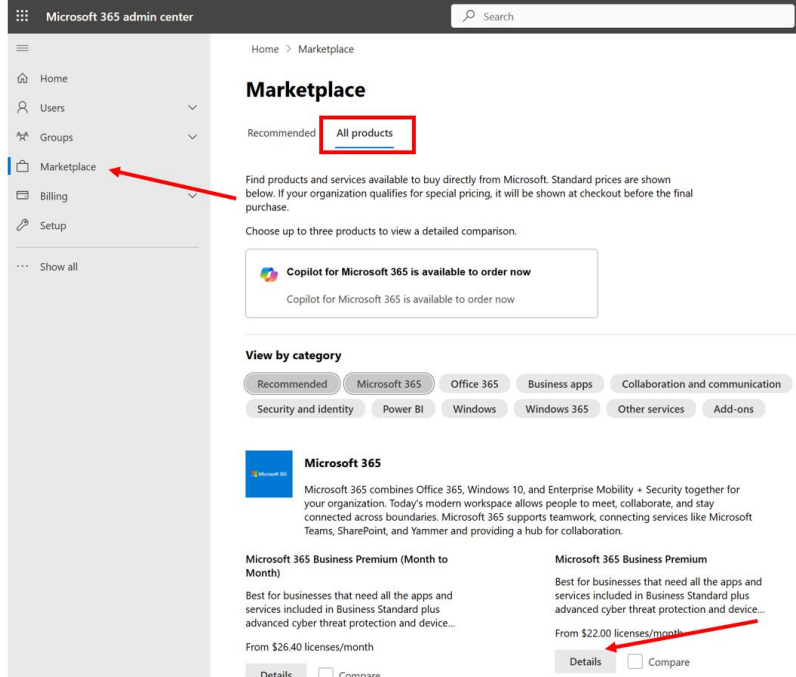
5. Click to add a trial
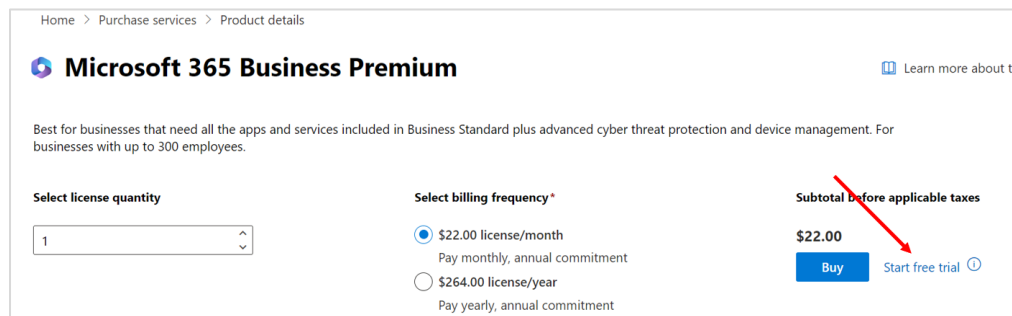
6. Click **Try Now** on the checkout screen

7. Click **Continue** on the order receipt screen

order receipt

Your confirmation number is: 9623a497-023b-4116-93cb-54cccc349a5a
Important: To use your new licenses, make sure to assign them by editing users on the Users page.

Continue

Order details

Microsoft 365 Business Premium Trial | 1 month term
25 licenses

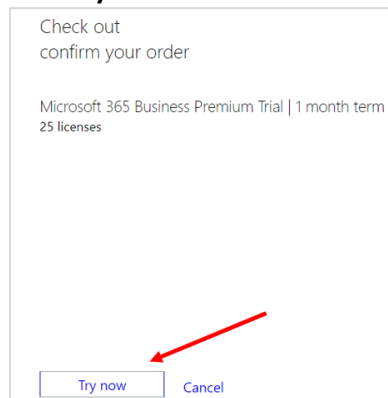8. Go to **Microsoft 365 admin Center** > **Users**, select your admin user and assign one of the **Microsoft 365 Business Premium** and click **Save Changes**

## Step 3 – Sign up for Dynamics 365 Sales Trial and access the environment in Power platform

Our lab uses some tables and data from Dynamics 365 Sales product like Leads and Activity. We will sign-up for a free trial which will add a new Environment to our tenant with sample data.

1. In the same browser, open a new window and open - https://www.microsoft.com/en-us/dynamics-365/ . Click on Try for free.

2. Under Choose your trial, select Sales and click on Try for free
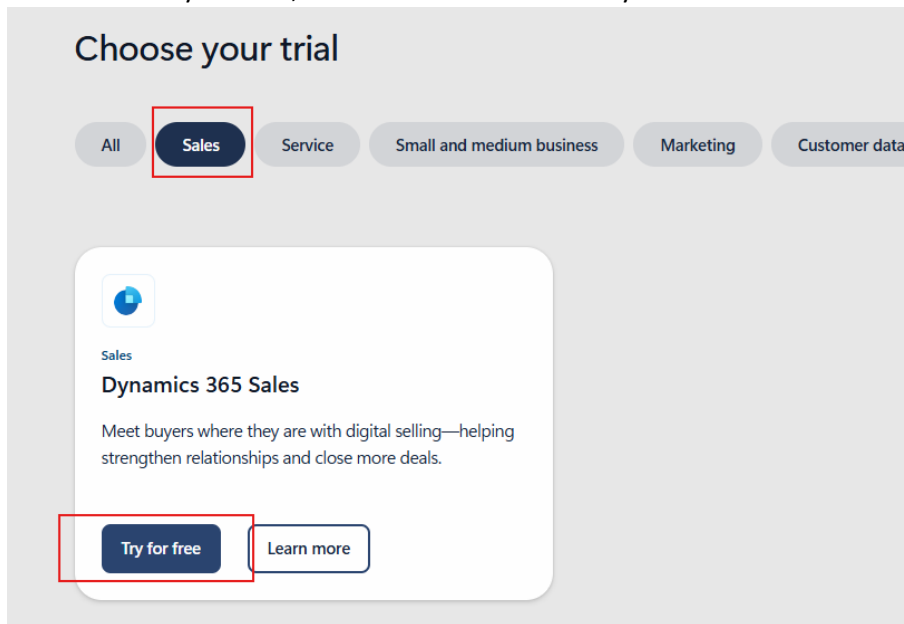
3. Make sure to provide your new tenant admin email address and select **Start your free trial.** This will install a Dynamics 365 Sales Trial in your tenant
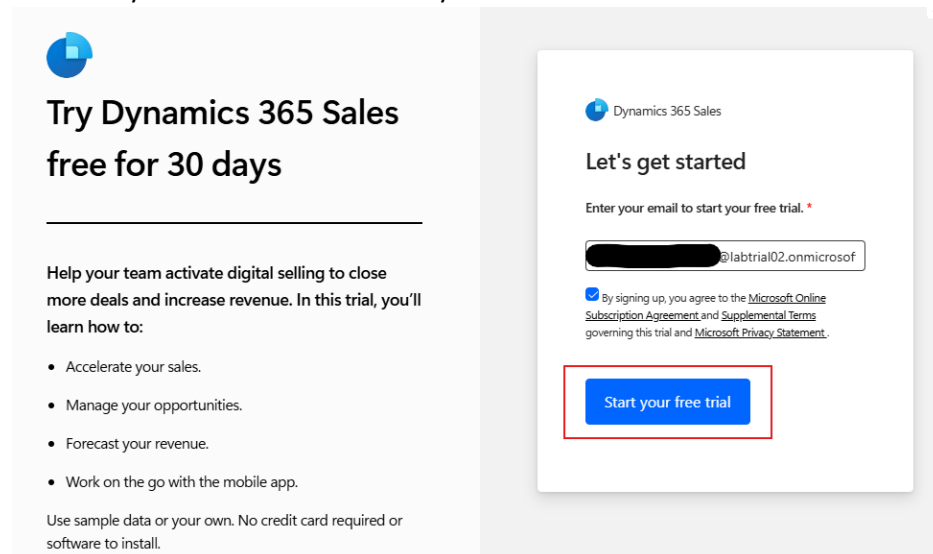
In case you see an error when adding Sales Trial, you can try an alternat**ive** way to create an environment. Go to – https://aka.ms/ppac (Power platform admin center), select **Environments** on the left menu.

Select New and provide environment details as shown below.

Select Next and choose Dataverse details and click on **Save.**

4. Once the Sales Trial OR Dataverse environment is created, In the same browser open another tab and login to https://make.powerapps.com.

5. Select **Environment** at right top and select the new **Sales Trial/newly created** Environment.

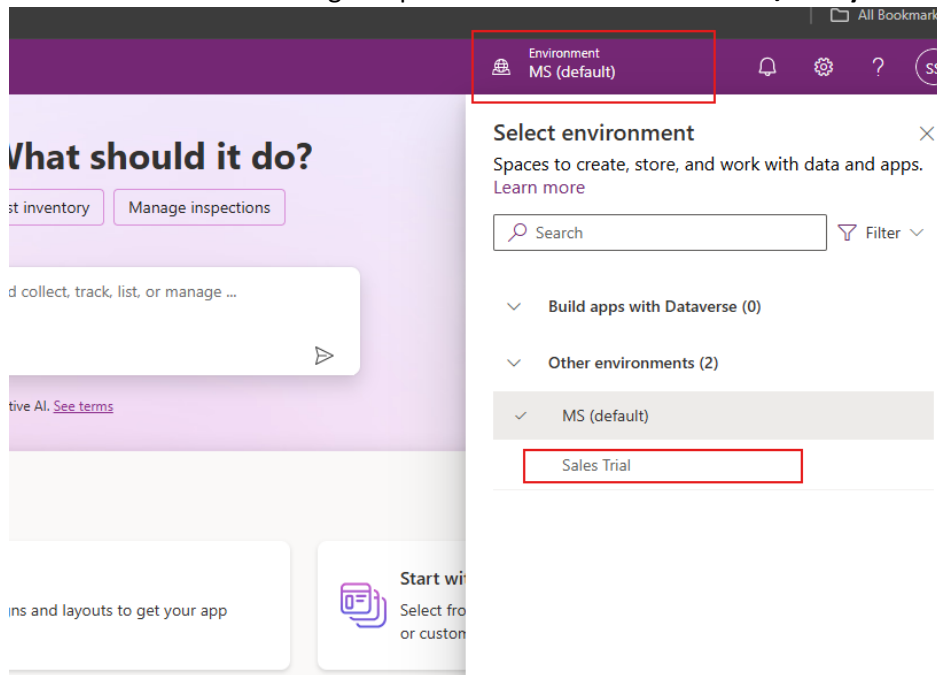6. On the left-hand menu, select **Tables >** Open **Account** table to make sure sample data exists. (Note: It might take a few minutes to show the list of tables. Please give a couple minutes and try refreshing the browser)

For all your labs, it's important to select this trial environment (on top-right) while using Copilot Studio or other Power Platform products during this workshop.
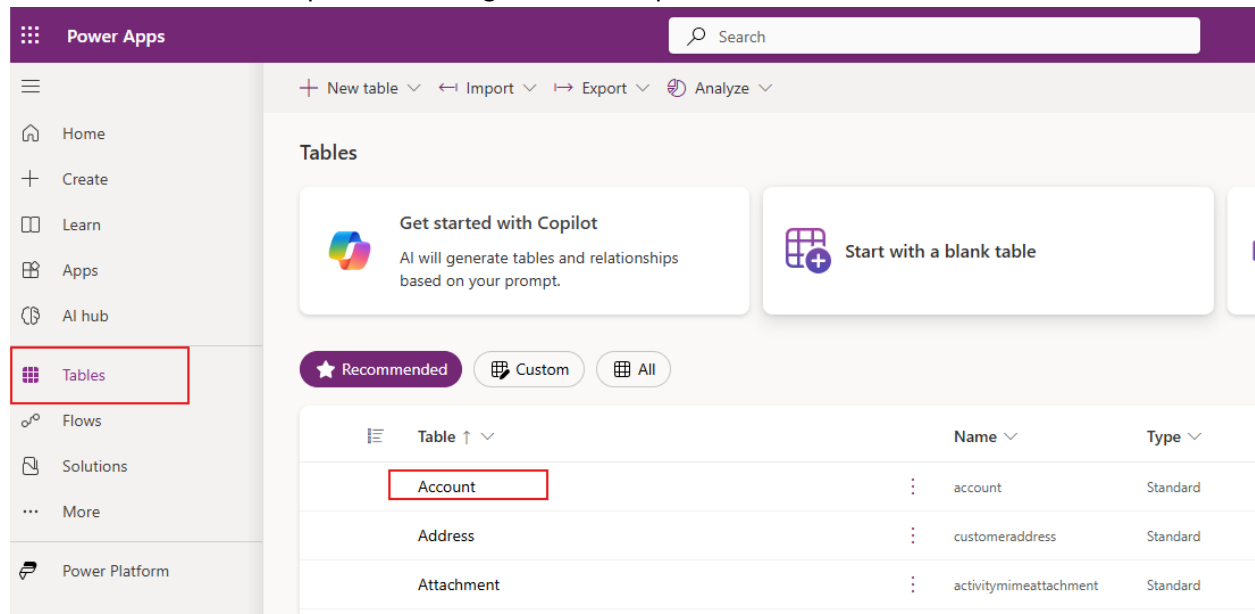
Step 4 – Create an Azure Subscription

To complete the hands-on labs, attendees will need access to an active **Azure subscription**. Please choose **one** of the following options:

a. **Use an existing Azure subscription** in your organization's tenant (if available).

b. **Sign up for an Azure Free Trial** – a one-month free subscription with $200 in credits. *(Credit card required for verification; no charges will apply.)*

c. If the first 2 options don't work, you may use a **Pay-As-You-Go subscription**. While our labs are designed to use **free Azure services**, please be careful not to provision any paid services unintentionally. It is your responsibility to cancel this subscription after the event.

For options b and c, please follow the steps below:

1. In your same browser open another tab and open – https://azure.microsoft.com/en-us/pricing/purchase-options/azure-account
2. Click on **Try Azure for free**
3. Provide consent and select **Next**

4. Select **country code** and add your **phone number** and verify.

d. Select or provide your credit card information and select **Sign up**
(**Note**: no automatic charges with free trial. If you've signed up for a trial account in the past, you may see the option to use – Azure Pay as you go. While our labs are designed to use **free Azure services**, please be careful not to provision any paid services unintentionally. It is your responsibility to cancel this subscription after the event.)

5. You might be asked to enable **Multi factor authentication**, and you can do this using Microsoft Authenticator App.
6. Once complete, you should see -
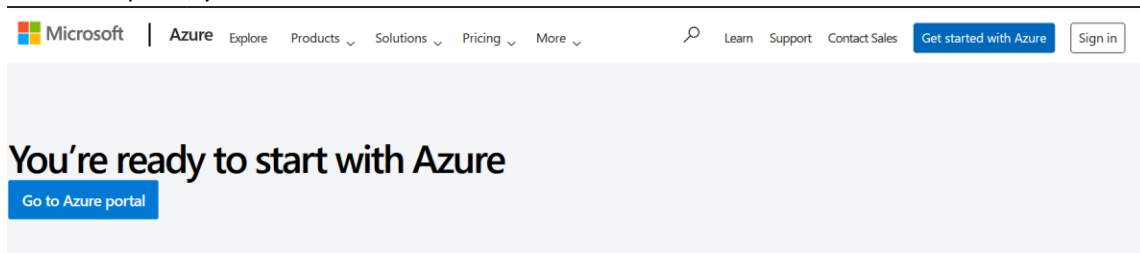
7. Click on **Go to Azure Portal** and in the top search bar, search for **subscriptions.** You should find an active Azure subscription

You are all set and ready to execute our labs!