

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

The screenshot shows the first step of a three-step wizard titled "About you". The steps are indicated by three circles at the top: "About you" (filled blue), "Sign-in details" (empty), and "Complete & get started" (empty). Below the steps, the heading "Let's get you started" is displayed. A text instruction asks the user to enter their work or school email address to check if a new account is needed. A red-bordered input field is provided for the email address, with the placeholder "Email" and a note "This is required". At the bottom is a blue "Next" button.

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

The screenshot shows the second step of the wizard, "Sign-in details". The three-step navigation bar at the top shows "About you" (filled blue), "Sign-in details" (filled grey), and "Complete & get started" (empty). The heading "Let's get you started" is repeated. A message informs the user that a new account is needed and provides the email address "thaddeusmt@live.com" for continuation. Two buttons are at the bottom: a blue "Set up account" button and a white "Change my email" button.

5. Fill in your details and then click **Next**

The screenshot shows the 'About you' step of a three-step wizard. The steps are: About you, Sign-in details, and Complete & get started. The title 'Tell us about yourself' is at the top. Fields include: First name (filled with placeholder text), Middle name (Optional) (empty), Last name (empty), Business phone number (empty), Company name (empty), Company size (dropdown menu showing 'Select one from below'), Country or Region (dropdown menu showing 'United States'), and a consent section. The 'Next' button is highlighted with a red box.

First name _____ Middle name (Optional) _____

Last name _____

Business phone number _____

Company name _____ Company size Select one from below

Country or Region United States

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

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

The screenshot shows the 'Text me or Call me' step of the wizard. It includes fields for selecting communication method (radio buttons for 'Text me' and 'Call me', with 'Text me' selected), entering a phone number (Country code dropdown set to '+1 United States' and Phone number input field), and a note about privacy. The 'Send verification code' button is highlighted with a red box.

Text me

Call me

Country code (+1) United States Phone number _____

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

Send verification code Back

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

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

Security check

A text or phone call helps us make sure this is you.
Enter a number that isn't VoIP or toll free.

Text me
 Call me

Country code Phone number
(+1) United States 9528205715

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



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)

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

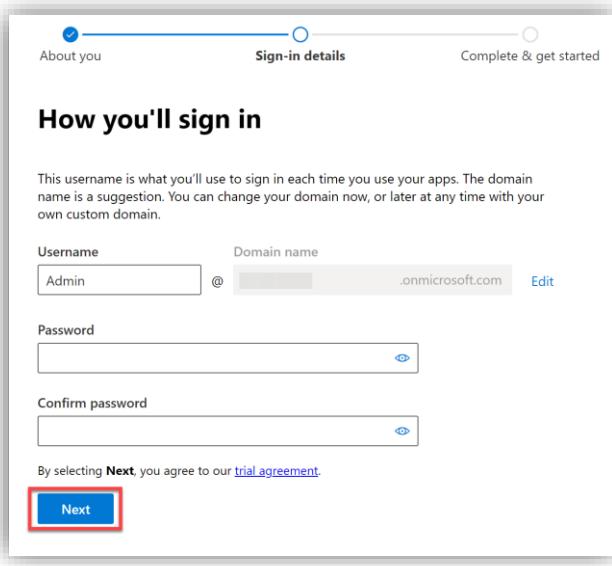
How you'll sign in

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 Domain name
Admin @ .onmicrosoft.com **Save**

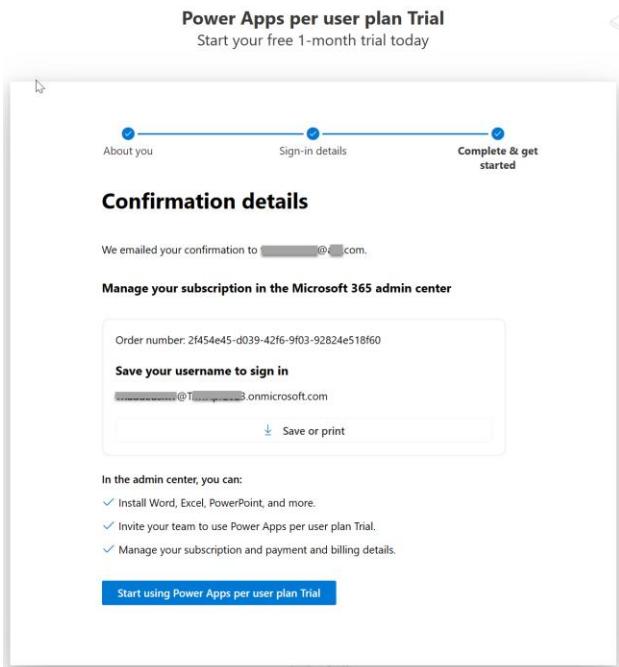


9. Enter a **Password**, **Confirm password** and click **Next** (note your password)



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**

The screenshot shows the Microsoft 365 admin center interface. On the left, there is a navigation sidebar with various options like Home, Users, Teams & groups, Billing, and Billing accounts. The 'Billing accounts' option is highlighted with a red box. The main content area shows the 'PowerPagesDec1' tenant. Under 'Billing account details', it lists the 'Sold to address' as Thaddeus Thompson from US, with the email address 'thaddeus.thompson@powerpagesdec1.onmicrosoft.com' displayed. A red arrow points to the 'Edit' button located to the right of the email address.

3. Ensure you see or add your name, billing address, email address and click **Save**

The screenshot shows a form titled 'Address' for adding a new billing address. The fields are as follows:

- Address line 1 *: One Microsoft Way
- Address line 2 (Optional): (empty)
- City *: Redmond
- State *: Washington
- Zip *: 98052
- Country/Region *: United States
- Your Phone Number: (empty)

4. Click on **Marketplace** (or it might say Purchase Services), select **All Products**, locate **Microsoft 365 Business Premium**, and click Details

The screenshot shows the Microsoft 365 admin center interface. On the left, there's a sidebar with links like Home, Users, Groups, Marketplace (which has a red arrow pointing to it), Billing, Setup, and Show all. The main area is titled 'Marketplace'. At the top right is a search bar. Below it, there's a section for 'Copilot for Microsoft 365' with a note 'Copilot for Microsoft 365 is available to order now'. The 'View by category' section includes buttons for Recommended, Microsoft 365 (which is highlighted with a red box), Office 365, Business apps, Collaboration and communication, Security and identity, Power BI, Windows, Windows 365, Other services, and Add-ons. Under 'Microsoft 365', there's a brief description: 'Microsoft 365 combines Office 365, Windows 10, and Enterprise Mobility + Security together for your organization. Today's modern workspace allows people to meet, collaborate, and stay connected across boundaries. Microsoft 365 supports teamwork, connecting services like Microsoft Teams, SharePoint, and Yammer and providing a hub for collaboration.' It lists two options: 'Microsoft 365 Business Premium (Month to Month)' and 'Microsoft 365 Business Premium'. The 'Month to Month' option is described as 'Best for businesses that need all the apps and services included in Business Standard plus advanced cyber threat protection and device...'. The 'Business Premium' option is described as 'Best for businesses that need all the apps and services included in Business Standard plus advanced cyber threat protection and device...'. Both options show a price of 'From \$26.40 licenses/month'. Below each option are 'Details' and 'Compare' buttons, with a red arrow pointing to the 'Details' button for the Business Premium option.

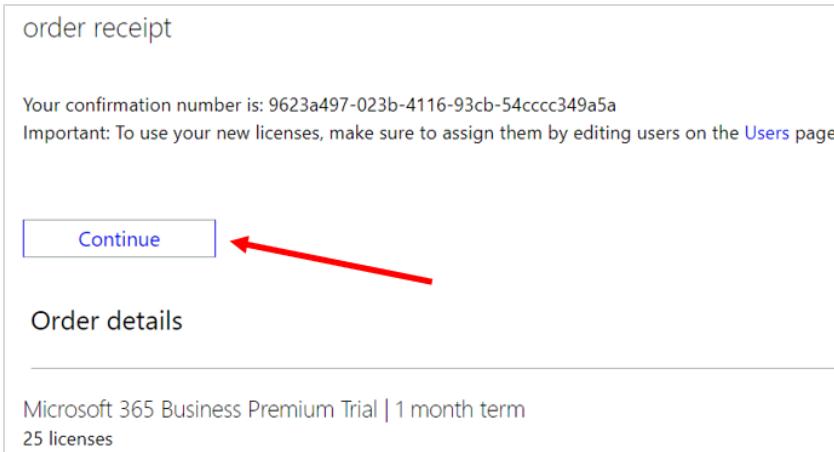
5. Click to add a trial

The screenshot shows the product details page for Microsoft 365 Business Premium. At the top, there's a title 'Microsoft 365 Business Premium' with a 'Learn more about this product' link. Below the title, there's a description: 'Best for businesses that need all the apps and services included in Business Standard plus advanced cyber threat protection and device management. For businesses with up to 300 employees.' There are two sections for 'Select license quantity' and 'Select billing frequency*'. Under 'Select license quantity', there's a dropdown menu set to '1'. Under 'Select billing frequency*', there are two radio buttons: '\$22.00 license/month' (selected) and '\$264.00 license/year'. Both options have a 'Pay monthly, annual commitment' note below them. To the right, there's a 'Subtotal before applicable taxes' section showing '\$22.00' and a 'Buy' button. Next to the 'Buy' button is a 'Start free trial' button with a red arrow pointing to it.

6. Click **Try Now** on the checkout screen

The screenshot shows a checkout screen. At the top, there's a 'Check out' button and a 'confirm your order' link. Below that, it says 'Microsoft 365 Business Premium Trial | 1 month term' and '25 licenses'. At the bottom, there are two buttons: 'Try now' (highlighted with a red arrow) and 'Cancel'.

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



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**

Microsoft 365 admin center

Home > Active users

Active users

Add a user Multi-factor authentication Re

Display name ↑

Tad Admin User

TU Tad Admin User Reset password

Account Devices Licenses and apps Mail OneDrive

2 subscriptions or trials will expire soon.
Manage your subscriptions in Billing > Your products

Select location *

United States

Licenses (2)

Microsoft 365 Business Premium
24 of 25 licenses available

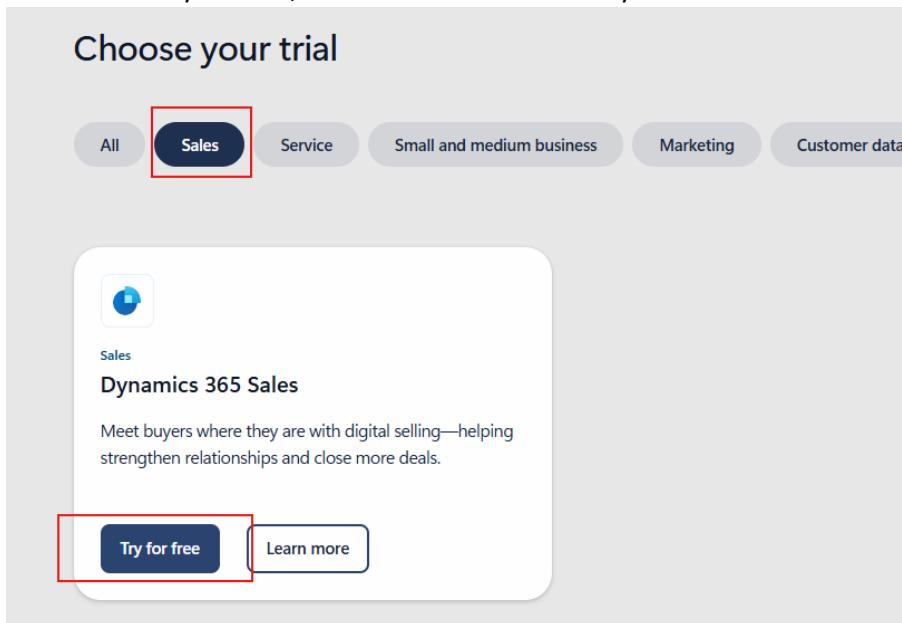
Power Apps Premium
24 of 25 licenses available

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

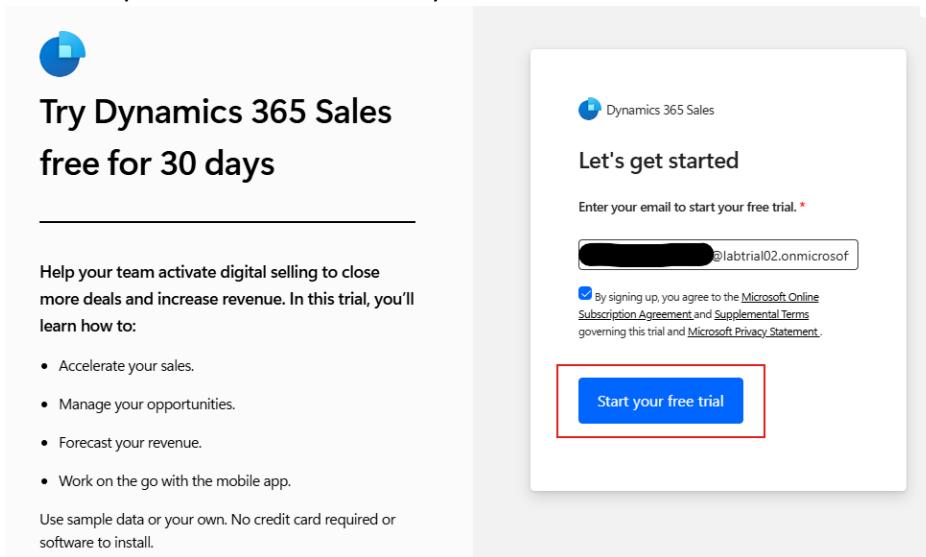
Our lab uses some tables and data from Dynamics 365 Sales product like Leads and Activity. We will sign-up for a free trial which will add a new Environment to our tenant with sample data.

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 alternative 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.

New environment

This operation is subject to [capacity constraints](#)

Name *
Event Lab 01

Make this a Managed Environment (i)
 No

Group
Choose a group

Region *
United States - Default

A local region can provide quicker data access

Get new features early (i)
 No

Type (i) *
Trial (subscription-based)

Purpose
Describe the environment's purpose

Add a Dataverse data store? (i)
 Yes
Dataverse must always be added for the selected type: Trial (subscription-based)

Pay-as-you-go with Azure? (i)

Next Cancel

Select Next and choose Dataverse details and click on Save.

Add Dataverse

This operation is subject to [capacity constraints](#)

Language *
English (United States)

Default language for user interfaces in this environment

Currency *
USD (\$)

Reports will use this currency

Security group *
Restrict environment access to members of a security group or select None to opt for open access across your tenant. [Learn more](#)

None
(All users across your tenant will have access to the environment)

URL
A unique domain name will be generated.
Click [here](#) to enter a custom domain

Enable Dynamics 365 apps?
In addition to Power Apps. [Learn more](#)

Yes
If not enabled, you won't be able to install Dynamics 365 apps on this environment.
This decision is irreversible

Automatically deploy these apps
Sales Premium Trial

Save **Cancel**

- 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.

The screenshot shows the Microsoft Copilot Studio interface. At the top, there's a purple header bar with the text "Environment MS (default)" and a red box around it. Below the header is a sidebar titled "What should it do?" with buttons for "Start inventory" and "Manage inspections". The main workspace has a light blue background with a large button labeled "Start with AI, See terms" and a "Start with..." button below it. To the right, a modal window titled "Select environment" is open, showing a list of environments: "Build apps with Dataverse (0)", "Other environments (2)", "MS (default)" (which is selected and highlighted with a red box), and "Sales Trial" (which is also highlighted with a red box).

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.

The screenshot shows the Microsoft Power Apps studio interface. The left sidebar has a purple header "Power Apps" and includes options like "Home", "Create", "Learn", "Apps", "AI hub", "Tables" (which is selected and highlighted with a red box), "Flows", "Solutions", "More", and "Power Platform". The main area is titled "Tables" and shows two cards: "Get started with Copilot" (with a description about AI generating tables) and "Start with a blank table". Below these are three buttons: "Recommended" (highlighted with a red box), "Custom", and "All". A table view shows three rows: "Account" (selected and highlighted with a red box), "Address", and "Attachment". The columns are "Table", "Name", and "Type".

Table	Name	Type
Account	account	Standard
Address	customeraddress	Standard
Attachment	activitymimeattachment	Standard

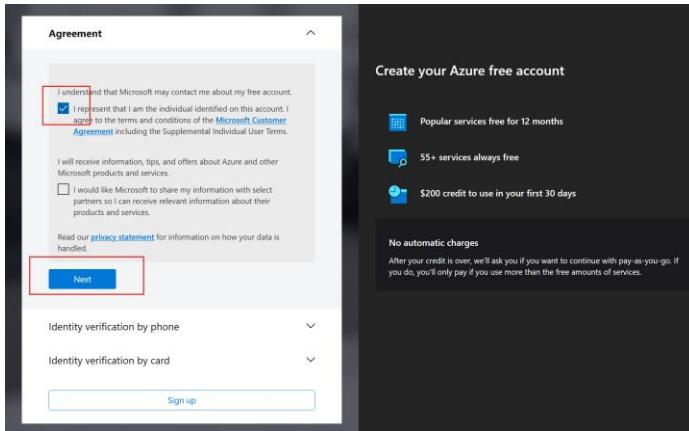
Step 4 – Create an Azure Subscription

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

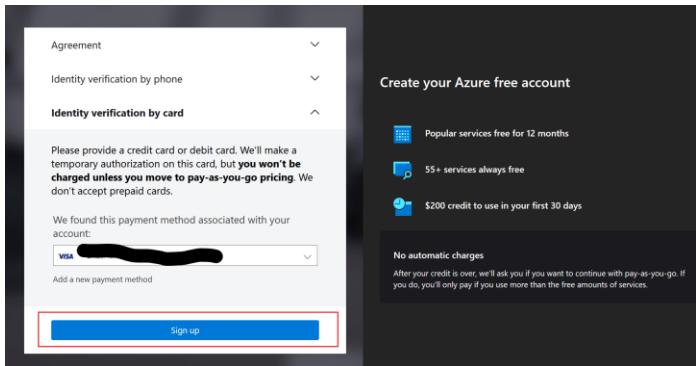
- a. **Use an existing Azure subscription** in your organization's tenant (if available).
- b. **Sign up for an Azure Free Trial** – a one-month free subscription with \$200 in credits. (*Credit card required for verification; no charges will apply.*)
- c. If the first 2 options don't work, you may use 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 -

The screenshot shows the Microsoft Azure homepage. At the top, there's a navigation bar with the Microsoft logo, 'Azure', 'Explore', 'Products', 'Solutions', 'Pricing', 'More', 'Learn', 'Support', 'Contact Sales', 'Get started with Azure', and 'Sign in'. Below the navigation bar, a large banner says 'You're ready to start with Azure' with a 'Go to Azure portal' button.

7. Click on **Go to Azure Portal** and in the top search bar, search for **subscriptions**. You should find an active Azure subscription

The screenshot shows the 'Subscriptions' page in the Azure portal. The top navigation bar includes 'Microsoft Azure', a search bar, 'Copilot', and user information 'ShashankChandra@scdyn772.onmicrosoft.com'. The main area shows a list of subscriptions. One subscription is listed: 'Azure subscription 1' with ID 'f0470d5f-9d0b-45b0-b831-4c50cf8...', role 'Owner', current cost 'Not available', secure score '−', parent management group 'Tenant Root Group', and status 'Active'. The entire list table is highlighted with a red border.

You are all set and ready to execute our labs!