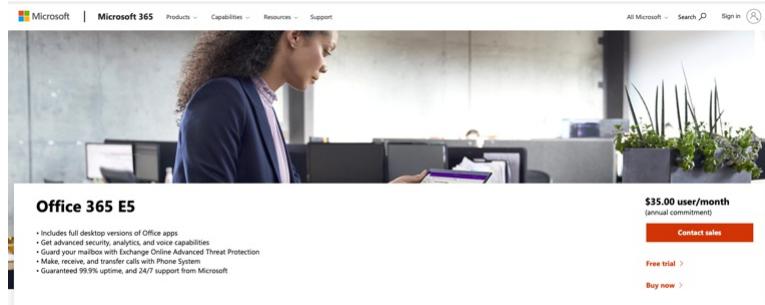


Setup

Create a new trial

Go to Microsoft 365 E5 page:

- <https://www.microsoft.com/nl-be/microsoft-365/business/office-365-enterprise-e5-business-software> or
- <https://www.microsoft.com/fr-be/microsoft-365/business/office-365-enterprise-e5-business-software>



Click the **Free trial** link, and in the first step specify your e-mail address:



Thank you for choosing **Office 365 E5**

1 Let's set up your account

Enter your work or school email address, we'll check if you need to create a new account for Office 365 E5.

Email

Next

2 Tell us about yourself

3 Create your business identity

4 You're all set

What is Office 365 E5?

Fully installed Office apps for PC and Mac



Premium services



Other benefits

- Unlimited personal cloud storage with qualifying plans
- Email hosting with 100 GB mailbox
- Online & desktop versions of Office applications
- Free FastTrack deployment support with 150+ seats

Trial highlights

25 licenses, 30-day free trial

[Privacy & cookies](#) [Terms of use](#) [Trademarks](#) © 2020 Microsoft

Feedback

Setup

Sales

Happy path:

- [Start with a Microsoft 365 E5 Trial](#)
- [Add the Dynamics 365 Customer Engagement Plan Trial](#)
- [Assigning Licenses](#)
- [Assigning Roles](#)
- [Outlook Integration](#)
- [Teams Integration](#)
- [Enable the Sales Insights features](#)

Other:

- [Initial Setup](#)
- [Adding a Microsoft 365 E5 Trial](#)
- [Create new demo environment](#)
- [Adding Users](#)
- [Personalize Dynamics 365 Home](#)

Marketing

- [Marketing Setup](#)

Customer Service

- [Customer Service Setup](#)
- [Customer Portal Setup](#)
- [Provision Omnichannel for Customer Service](#)
- [Add a trial of the Dynamics 365 Customer Service Digital Messaging add-on](#)
- [Configure Chat Widget](#)
- [Setup Power Virtual Agents and Omnichannel for Customer Service](#)

Customer Insights

- [Customer Insights Setup](#)
- [Install Customer Insights Customer Card Add-in](#)

Customer Voice

- [Setup Dynamics 365 Customer Voice](#)

Misc

- [AI Builder Demo Setup](#)
- [Prepare Edge Profile](#)

Business Central

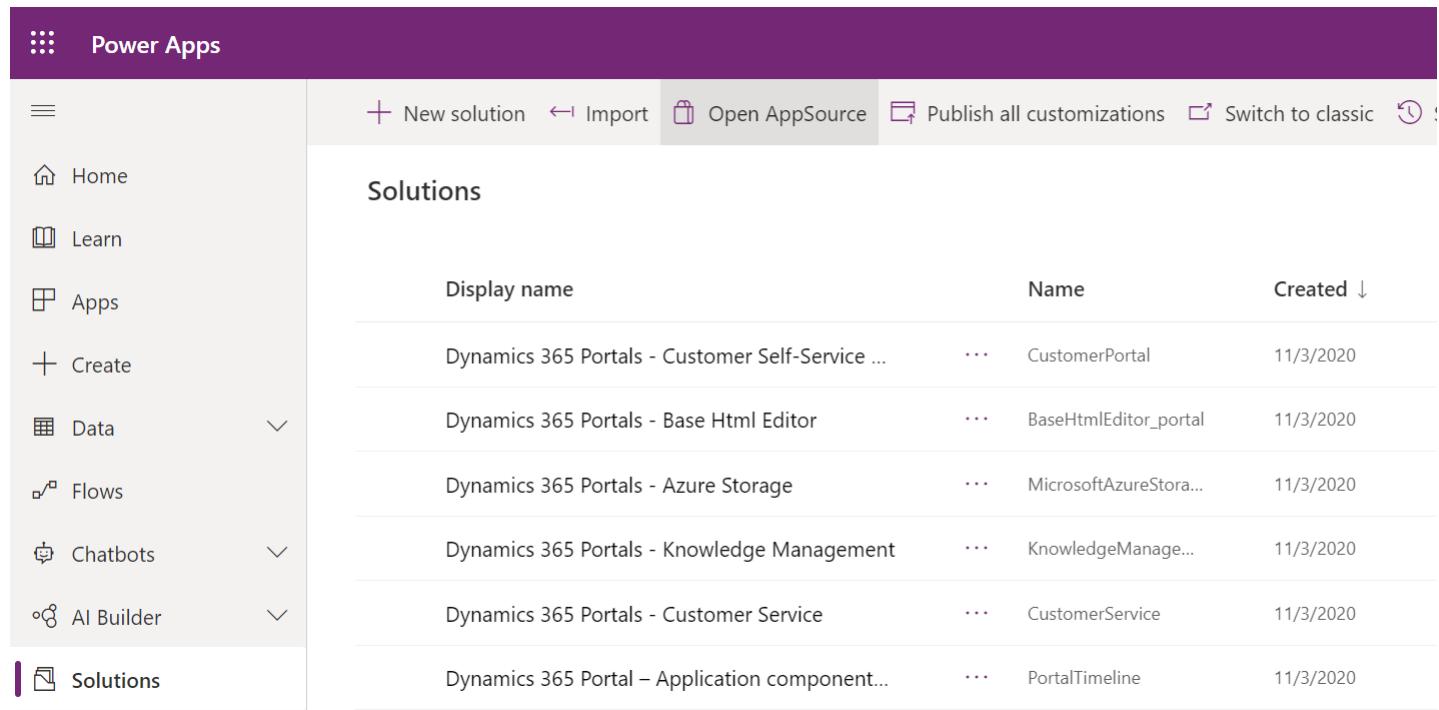
- [Business Central Setup](#)

Troubleshooting

- [Disable security defaults](#)
- [Enable disabled users](#)

Install Customer Insights Customer Card Add-in

In the Maker Portal select your environment, navigate to solutions and click **Open AppSource**:



The screenshot shows the Microsoft Power Apps maker portal interface. The top navigation bar is purple with the text "Power Apps". Below it is a toolbar with icons for "New solution", "Import", "Open AppSource" (which is highlighted in grey), "Publish all customizations", "Switch to classic", and a settings gear icon. On the left, there's a sidebar with icons for Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder, and Solutions. The "Solutions" icon is highlighted with a purple bar at the bottom. The main content area is titled "Solutions" and lists several items in a table format:

Display name	Name	Created
Dynamics 365 Portals - Customer Self-Service ...	CustomerPortal	11/3/2020
Dynamics 365 Portals - Base Html Editor	BaseHtmlEditor_portal	11/3/2020
Dynamics 365 Portals - Azure Storage	MicrosoftAzureStora...	11/3/2020
Dynamics 365 Portals - Knowledge Management	KnowledgeManage...	11/3/2020
Dynamics 365 Portals - Customer Service	CustomerService	11/3/2020
Dynamics 365 Portal – Application component...	PortalTimeline	11/3/2020

From AppSource find **Customer Insights Customer Card Add-in (preview)** and click ** Get it now**:

[AppSource](#) [Apps for Dynamics 365](#)[Apps \(2\)](#)[Other apps ▾](#)

customer ins

Categories

AI + Machine Learning

Analytics

Collaboration

Compliance & Legal

Customer Service

Finance

Geolocation

Human Resources

Internet of Things

IT & Management Tools

Marketing

Operations & Supply Chain

Productivity

Sales



MazikCare - Customer Insights For HealthCare

By Mazik Global Inc.
Apps

MazikCare Customer Insight for HealthCare helps you gain deeper understanding of patient

(1)

[Contact me](#)

Customer Insights Customer Card Add-in (Preview)

By Microsoft Dynamics 365
Dynamics 365

Surface unified customer data and insights within Dynamics 365 applications

(1)

[Get it now](#)[Find more apps and consulting services at AppSource ↗](#)Once installed go to **Power Platform admin center** navigate to **Resources | Dynamics 365 apps** and click **install** from the context menu for **Customer Insights Customer Card Add-in**:

Power Platform admin center

☰

Install Details

To manage Power Apps and Power Automate resources, select an environment.

Dynamics 365 apps

See which apps are available to install and configure in your org (tenant). [Learn more](#)

Name ↑	Status	Publisher
AI Builder for Project Cortex	Enabled	Microsoft Dynan
Business Central Virtual Entity (Preview)	Enabled	Microsoft
Customer Insights Customer Card Add-in (Preview)	Enabled	Microsoft Dynan
Customer Service Team Member	Enabled	Microsoft Dynan
CVAA Solution	Enabled	Microsoft Dynan
Dual-write application orchestration solution	Enabled	Microsoft Dynan
Dual-write core solution	Enabled	Microsoft Dynan

Select your environment and click **Install**:

Install Details

Power Platform admin center



Environments

Analytics

Resources

Capacity

Dynamics 365 apps

Portals

Help + support

Data integration

Data (preview)

Data policies

Admin centers

Install Details

To manage Power Apps and Power Automate resources, select an environment.

Dynamics 365 apps

See which apps are available to install and configure in your org (tenant). [Learn more](#)

Name ↑	Status	Publisher
AI Builder for Project Cortex	Enabled	Microsoft Dynamics 365
Business Central Virtual Entity (Preview)	Enabled	Microsoft
Customer Insights Customer Card Add-in (Preview)	Enabled	Microsoft Dynamics 365
Customer Service Team Member	Enabled	Microsoft Dynamics 365
CVAA Solution	Enabled	Microsoft Dynamics 365
Dual-write application orchestration solution	Enabled	Microsoft Dynamics 365
Dual-write core solution	Enabled	Microsoft Dynamics 365
Dynamics 365 Channel Integration Framework - V2	Enabled	Microsoft Dynamics 365
Dynamics 365 Connector for LinkedIn Lead Gen Forms	Not Configured	Microsoft Dynamics 365
Dynamics 365 Connector for LinkedIn Lead Gen Forms	Not Configured	Microsoft Dynamics 365
Dynamics 365 ContextualHelp	Enabled	Microsoft Dynamics 365
Dynamics 365 Customer Voice	Enabled	Microsoft Dynamics 365
Dynamics 365 for Field Service	Enabled	Microsoft Dynamics 365
Dynamics 365 for Project Service Automation	Enabled	Microsoft Dynamics 365
Dynamics 365 for Sales, Enterprise Edition App	Enabled	Microsoft Dynamics 365
Dynamics 365 Healthcare Accelerator Sample Data	Enabled	Microsoft
Dynamics 365 HR Virtual Entity	Enabled	Microsoft Dynamics 365
Dynamics 365 Marketing Application	Not Configured	Microsoft Dynamics 365
Dynamics 365 Marketing Application org65f6b3a3	Configured	Microsoft Dynamics 365
Dynamics 365 Marketing Solution Only	Not Configured	Microsoft Dynamics 365

Wait while installing.

← → ⌂ https://admin.powerplatform.microsoft.com/environments/866bb1f8-324e-4bf2-a179-a3a5c124e87c/applications

Power Platform admin center

☰
Install app
Open AppSource

ⓘ Customer Insights Customer Card Add-in (Preview) installation started at 5:03 pm, 11/10/2020 by Yves Kerwyn.

Environments
Analytics
Dynamics 365 apps

Resources
Capacity
Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)

Name ↑	Status	Publisher
Connected Field Service Add-on	Installed	Microsoft Dynan
Customer Insights Customer Card Add-in (Preview)	Installing...	Microsoft Dynan
Dynamics 365 Channel Integration Framework	Installed	Microsoft Dynan
Dynamics 365 Channel Integration Framework - V2	Installed	Microsoft Dynan
Dynamics 365 ContextualHelp	Update available	Microsoft Dynan
Dynamics 365 Customer Voice	Installed	Microsoft Dynan

As a result you can check that the add-in was installed in your environment:

Power Platform admin center

☰
Install app
Open AppSource

Environments
Analytics
Dynamics 365 apps

Resources
Capacity
Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)

Name ↑	Status	Publisher
Connected Field Service Add-on	Installed	Microsoft Dynan
Customer Insights Customer Card Add-in (Preview)	Installed	Microsoft Dynan
Dynamics 365 Channel Integration Framework	Installed	Microsoft Dynan
Dynamics 365 Channel Integration Framework - V2	Installed	Microsoft Dynan
Dynamics 365 ContextualHelp	Update available	Microsoft Dynan
Dynamics 365 Customer Voice	Installed	Microsoft Dynan
Dynamics 365 for Sales, Enterprise Edition App	Installed	Microsoft Dynan

Or checking the installed solutions in the **Maker Portal**:

Power Apps

- ≡
- Home
- Learn
- Apps
- + Create
- Data
- Flows
- Chatbots
- AI Builder
- Solutions

+ New solution ← Import 🛍 Open AppSource 📁 Publish all customizations ⚙ Switch to classic ⏱

Solutions

Display name	Name	Created ↓
Dynamics 365 Customer Insights Customer Car...	CustomerInsightsCu...	11/10/2020
Dynamics 365 Portals - Customer Self-Service ...	CustomerPortal	11/3/2020
Dynamics 365 Portals - Base Html Editor	BaseHtmlEditor_portal	11/3/2020
Dynamics 365 Portals - Azure Storage	MicrosoftAzureStora...	11/3/2020
Dynamics 365 Portals - Knowledge Management	KnowledgeManage...	11/3/2020
Dynamics 365 Portals - Customer Service	CustomerService	11/3/2020

Click **Switch to classic**:

Power Apps

- ≡
- Home
- Learn
- Apps
- + Create

+ New solution ← Import 🛍 Open AppSource 📁 Publish all customizations ⚙ Switch to classic ⏱ ⏴

Solutions

Display name	Name	Created ↓
Dynamics 365 Customer Insights Customer Car...	CustomerInsightsCu...	11/10/2020

In the legacy interface click the **Dynamics 365 Customer Insights Customer Card Add-In**:

All Solutions ▾

Name	Display Name	Version
CustomerInsightsCustomerCard	Dynamics 365 Customer Insights Customer Card Add-in (Preview)	0.7.19
CustomerPortal	Dynamics 365 Portals - Customer Self-Service Portal	9.2.200
BaseHtmlEditor_portal	Dynamics 365 Portals - Base Html Editor	1.1.1.1
MicrosoftAzureStorage	Dynamics 365 Portals - Azure Storage	9.2.200

This brings up following window:

<https://m3l-ce.crm4.dynamics.com/tools/solution/edit.aspx?id=%7bE691DB38-FD96-4997-AD3A-0C1EF7EB42C8%7d>

Power Apps

New Alerts (5) Latest: You've got an alert for the mailbox 'Yves Kerwyn'. 11/2/2020 8:21 PM [View Alerts](#)

File [Close](#) [Show Dependencies](#) [Actions](#)

Solution: Dynamics 365 Customer Insights Customer Card Add-in (Preview)

Information

! You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customization from another unmanaged solution.

Solution Dynamics 365 Customer ...

Information Configuration Components

- ▷ Entities
- ▷ Option Sets
- ▷ Client Extensions
- ▷ Web Resources
- ▷ Processes
- ▷ Plug-in Assemblies
- ▷ Sdk Message Processing...
- ▷ Service Endpoints
- ▷ Dashboards
- ▷ Dialog Boxes
- ▷ Reports
- ▷ Connection Roles
- ▷ Article Templates
- ▷ Contract Templates
- ▷ Email Templates
- ▷ Mail Merge Templates
- ▷ Security Roles

Dynamics 365 Customer Insights Customer Card Add-in

1. Authenticate to the Azure Active Directory (AAD) tenant where you have Dynamics 365 Customer Insights installed
Authenticate with an account that has global admin rights to the Azure Active Directory (AAD) tenant where Dynamics 365 Customer Insights is installed. This will allow the Customer Card Add-in solution to authenticate against Dynamics 365 Customer Insights.
[Login with your org credentials](#)
2. Select the Dynamics 365 Customer Insights instance you wish to connect to
Dynamics 365 Customer Insights instance
3. Indicate which Dynamics 365 Customer Insights field matches the Dynamics 365 Contact Id
Dynamics 365 contact id field

4. Indicate which Dynamics 365 Customer Insights field matches the Dynamics 365 Account Id

After signing in and selecting the environment to connect to you should normally be able to select the matching the Customer Insights fields - which was not yet possible when documenting this:

<https://m3l-ce.crm4.dynamics.com/tools/solution/edit.aspx?id=%7bE691DB38-FD96-4997-AD3A-0C1EF7EB42C8%7d#>



Solution: Dynamics 365 Customer Insights Customer Card Add-in (Preview)

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customization for an unmanaged solution.

Solution Dynamics 365 Customer ...

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
- Plug-in Assemblies
- Sdk Message Processing...
- Service Endpoints
- Dashboards
- Dialog Boxes
- Reports
- Connection Roles
- Article Templates
- Contract Templates
- Email Templates
- Mail Merge Templates
- Security Roles
- Field Security Profiles
- Routing Rule Sets
- Record Creation and U...
- SLAs
- Model-driven Apps
- Custom Controls
- Virtual Entity Data Prov...
- Virtual Entity Data Sour...
- Mobile Offline Profiles
- Solution Component A...
- Solution Component C...

Dynamics 365 Customer Insights Customer Card Add-in

1. Authenticate to the Azure Active Directory (AAD) tenant where you have Dynamics 365 Customer Insights installed
Authenticate with an account that has global admin rights to the Azure Active Directory (AAD) tenant where Dynamics 365 Customer Insights is installed.
This will allow the Customer Card Add-in solution to authenticate against Dynamics 365 Customer Insights.

Connected

[Sign out to connect to a different AAD tenant](#)

2. Select the Dynamics 365 Customer Insights instance you wish to connect to

Dynamics 365 Customer Insights instance

CI Trial

3. Indicate which Dynamics 365 Customer Insights field matches the Dynamics 365 Contact Id

Dynamics 365 contact id field

Please select

4. Indicate which Dynamics 365 Customer Insights field matches the Dynamics 365 Account Id

Dynamics 365 account id field

Please select

Something went wrong.

[Save configuration](#)

You will need to assign the role 'Customer Insights Card Customizer' role to all users who need to configure the Customer Insights Customization.

Customer Insights Setup

In the Microsoft 365 admin center find **Dynamics 365 Customer Insights Trial** under **Billing | Purchase services**:

Microsoft 365 admin center

Milernas-XPC

Purchase services

Select up to three products for a detailed comparison.

Product 1 Product 2 Product 3 Compare products

Business apps

Dynamics 365



Unify CRM and ERP capabilities and break down data silos with Dynamics 365 - modern, intelligent cloud applications that help move your business forward. End-to-end applications for Sales, Service, Finance and Operations, Talent, and Marketing that work great on their own and even better together.

Dynamics 365 Customer Service Insights User subscription that includes Dynamics 365 Customer Service Insights From €63.20 user/month Details <input type="checkbox"/> Compare	Dynamics 365 Customer Insights Trial User subscription that includes Dynamics 365 AI for Customer Insights Trial Details <input type="checkbox"/> Compare	Dynamics 365 Enterprise User subscription that includes Dynamics 365 Enterprise From €80.10 Details
---	---	---

Other services

Click **Details** and then in the next screen **Get free trial**:

 [Home](#) [Users](#) [Groups](#) [Billing](#) [Purchase services](#)[Your products](#)[Licenses](#)[Bills & payments](#)[Billing accounts](#)[Payment methods](#)[Billing notifications](#) [Setup](#) [Customize navigation](#)[... Show all](#)

Milernas-XPC

Purchase services

[Purchase Services](#) / Dynamics 365 Customer Insights Trial

Dynamics 365 Customer Insights Trial

User subscription that includes Dynamics 365 AI for Customer Insights

No results found.

Compa

Click **Try now** in the next screen:



Check out
confirm your order

Dynamics 365 Customer Insights Trial | 1 month term
25 users

[Try now](#)

[Cancel](#)

Then click ** Continue**:



order receipt

Your confirmation number is: a40c1aae-236f-45a8-ac69-21b568420175
Important: To use your new licenses, make sure to assign them by editing users on the [Users](#) page.

[Continue](#)

Order details

Dynamics 365 Customer Insights Trial | 1 month term
25 users

Back on the home page of the **Microsoft 365 admin center** navigate to [Users](#) | [Active users](#):

- Home
- Users
 - Active users
 - Contacts
 - Guest users
 - Deleted users
- Groups
- Billing
- Setup

- Customize navigation
- Show all

Milernas-XPC

[+ Add cards \(7 more available\)](#)

Microsoft Teams

...

Support remote workers with Teams

Learn how to manage Teams for remote work, with setup guidance, short videos, and tips.

- Teams is on for your organization
- Check setup status for new Teams users
- Guest access is on

[Manage Teams](#)[Learn more](#)

User management

User management

Add, edit, and remove user accounts,

[Add user](#)[Edit a user](#)

Training & guides



Training for admins
Microsoft 365 tutorials a



Customized setup guide
Choose a setup path to :



Training for users
Learn to use Microsoft 3

Message center

173 unread messages

New: Microsoft Lists undo and redo commands

Microsoft 365 admin center: Simplified admin experience

<https://admin.microsoft.com/AdminPortal/Home#/users>

Click **Manage product licenses** from the context menu of your user record:

[Home](#)[Users](#)[Active users](#)[Contacts](#)[Guest users](#)[Deleted users](#)[Groups](#)[Billing](#)[Setup](#)[Customize navigation](#)[Show all](#)

Milernas-XPC

Active users

Due to a recent increase in Teams usage, when you assign a Teams license to a user it may take around 24 hours have access to some Teams features like calling and audio conferencing. [Check status](#)

 [Add a user](#) [Refresh](#) [Delete user](#) [Reset password](#) [Manage product licenses](#)

Display name ↑

Username

Chiara Slootmaeckers

: chiara@m3lcie.onmicrosoft.com

Emmanuel Vercaemst

: emmanuel@m3lcie.onmicrosoft.com

 Yves Kerwyn

: yves@m3lcie.onmicrosoft.com

 [Manage product licenses](#) [Manage groups](#) [Delete user](#) [Manage username and email](#)

Select **Dynamics 365 Customer Insights** from the Licenses list and hit **Save changes**:

- Home
- Users
 - Active users
 - Contacts
 - Guest users
 - Deleted users
- Groups
- Billing
- Setup
- Customize navigation
- ... Show all

Milernas-XPC

Active users

Due to a recent increase in Teams usage, when you assign a Teams license to a user it may take around 24 hours for them to have access to some Teams features like calling and audio conferencing. [Check status](#)

Add a user Refresh Delete user Reset password Manage product licenses

Display name ↑

Username

Chiara Slootmaeckers

⋮

chiara@m3lcie.onmicrosoft.com

Emmanuel Vercaemst

⋮

emmanuel@m3lcie.onmicrosoft.com



Yves Kerwyn



⋮

yves@m3lcie.onmicrosoft.com

- Home
- Users
 - Active users
 - Contacts
 - Guest users
 - Deleted users
- Groups
- Billing
- Setup
- Customize navigation
- ... Show all

Milernas-XPC

Active users

Due to a recent increase in Teams usage, when you assign a Teams license to a user it may take around 24 hours have access to some Teams features like calling and audio conferencing. [Check status](#)

Add a user Refresh Delete user Reset password Manage product licenses

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Username

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Emmanuel Vercaemst

⋮

emmanuel@m3lcie.onmicrosoft.com



Yves Kerwyn



⋮

yves@m3lcie.onmicrosoft.com

Go to <https://home.ci.ai.dynamics.com/> and sign in and then click **Continue**:



Home



Customers



Segments



Measures



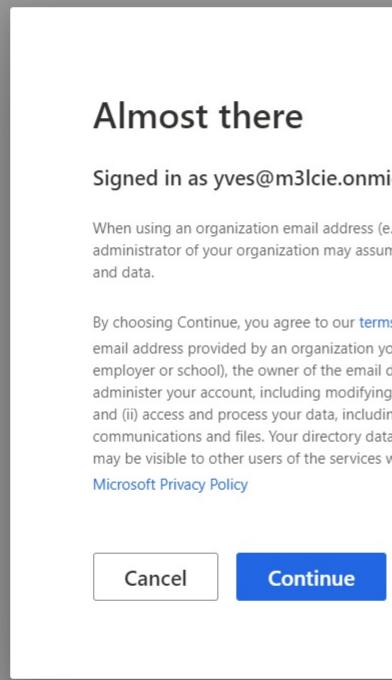
Intelligence



Data



Admin



You will need to create a new environment, specify a name, choose **Trial** as type, **Default** as demo template and **Eure** as region:



≡

Home

Customers

Segments

Measures

Intelligence



Data



Admin



Create an environment

Name *

You can change this later.

Type *

Select an industry demo *

Region *



✓ Advanced settings

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

Expand the **Advanced settings** and specify the address of your customer engagement environment:



Create an environment

Name You can change this later.

Type *

Select an industry demo *

Region *

[Advanced settings](#)

Save all data to *

Predictive AI features

Predictive features (ex: product recommendations, customer churn) require a Dynamics 365 server.

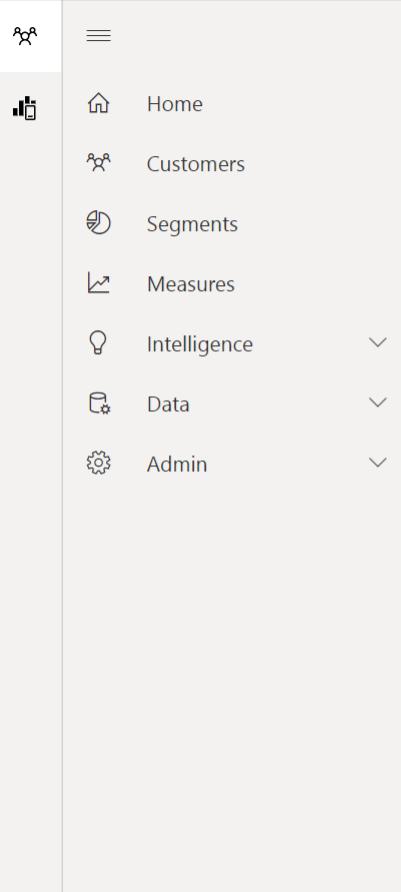
Server address

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



Click **Create** and wait a little while everything gets prepared:

① 30 day(s) left in trial - 'CI Trial'. | You're viewing sample data. To add your own data, switch environments. For licensing



Page 1c

Setup Dynamics 365 Customer Voice

Add a trial of the Dynamics 365 Customer Service Digital Messaging add-on

Go to the Microsoft 365 admin center: admin.microsoft.com

Navigate to **Billing** | **Purchase services**, scroll down to and on **Add-ons**:

Microsoft 365 admin center

Milernas-XPC

Search

Home

Users

Groups

Billing

Purchase services

Your products

Licenses

Bills & payments

Billing accounts

Payment methods

Billing notifications

Setup

Customize navigation

Show all

Purchase services

Business apps



Boost employee productivity with apps that power your organization. Build automate processes and tasks, plan and track your projects, and create organization charts, maps, and workflows - all to support your business.

Project Plan 1 (Month to Month)

An online project management solution to help keep your projects, resources, and teams organized and

From €8.40 user/month

[Details](#) Compare

Project Plan 1

An online project management solution to help keep your projects, resources, and teams organized and

From €8.40 user/month

[Details](#) Compare

Project Plan 1

An online project management solution to help keep your projects, resources, and teams organized and

From €25.30

[Details](#) Compare

Other categories that might interest you

[Collaboration and communication](#) [Power BI](#)

[Dynamics 365](#) [Windows](#)

[Security and identity](#)

In the list with all available add-ons scroll down, and click the tile for a trial of the **Dynamics 365 Customer Service Digital Messaging add-on**:

Milernas-XPC

Purchase services

Details	Compare	Details	Compare	Details	Compare	Details	Compare
Dynamics 365 Customer Service Chatbot session add-on This license is required if an individual with Chat or Digital Messaging SKU permissions From €42.20 addon/month Details Compare	Dynamics 365 Customer Service Digital Messaging add-on Trial User license for employees who need access to any combination of the following digital conversation channels within the Omnichannel for Customer Service interface: Chat, SMS (requires additional contract with Telesign), FB Messenger, and Whatsapp. Trial Details Compare	Dynamics 365 Enterprise Edition - Additional Portal Page Views (Qualified Offer) For any Portal exceeding 1,000,000 page views, additional Portal Page views capacity may be purchased From €42.20 addon/month Details Compare	Dynamics 365 Enterprise Edition - Additional Portal (Qualified Offer) Unit of 1 additional portal for CRMOL or Dynamics 365 applications or plans, which allow From €421.70 addon/month Details Compare				
Microsoft Dynamics CRM Online - Field Service User Add-On Subscription plan add-on for users who will engage in Field Service; accessing the schedule board, work From €29.50 user/month Details Compare	Dynamics 365 - Additional Non-Production Instance (Qualified Offer) Non-production instance add-on to expand the number of Dynamics 365, Enterprise Edition customer From €126.50 instance/month Details Compare	Pro Direct Support for Microsoft Dynamics 365 Professional Direct paid support offering for Microsoft Dynamics 365 which includes 24x7 support, From €7.60 user/month Details Compare	Office 365 Extra File Storage (Month to Month) Priced per gigabyte, Office 365 offers additional file storage options to support an From €0.21 gigabyte/month Details Compare				

Click the **Get free trial** button:

Milernas-XPC

Purchase services

[Purchase Services](#) / Dynamics 365 Customer Service Digital Messaging add-on

Dynamics 365 Customer Service Digital Messaging add-on

User license for employees who need access to any combination of the following digital conversation channels within the Omnichannel for Customer Service interface: Chat, SMS (requires additional contract with Telesign), FB Messenger, and Whatsapp.

No results found.

Starting at €63.20 user/month

Subscription options

- €63.20 user/month
- €758.40 user/year

[Buy](#) [Get free trial](#)

Click the **Try now** button:

Admin

Check out
confirm your order

Dynamics 365 Customer Service Digital Messaging add-on Trial | 1 month term
25 users

[Try now](#) [Cancel](#)

Click the **Continue** button:

order receipt

Your confirmation number is: 657d406a-0ab0-4a68-bd69-fa0c242dc97

Important: To use your new licenses, make sure to assign them by editing users on the [Users](#) page.[Continue](#)

Order details

Dynamics 365 Customer Service Digital Messaging add-on Trial | 1 month term
25 usersNext we will assign the trial license to the users. In [Billing](#) | [Licenses](#) click the license:

Microsoft 365 admin center Search

Milemas-XPC

Licenses

[Subscriptions](#) [Requests](#)

Select a product to view and assign licenses.
[Go to Your products](#) to manage billing or buy more licenses.

[Export](#) [Refresh](#)

Name ↑	Available licenses	Account type
Dynamics 365 Customer Engagement Plan	23 available 2 assigned of 25 total	Organization
Dynamics 365 Customer Service Digital Messaging add-on	25 available 0 assigned of 25 total	Organization
Microsoft Power Automate Free	9999 available 1 assigned of 10000 total	Organization
Office 365 E5	23 available 2 assigned of 25 total	Organization

Assign the license:

Microsoft 365 admin center

Milernas-XPC

Search

Home

Users

Groups

Billing

Purchase services

Your products

Licenses

Bills & payments

Billing accounts

Payment methods

Billing notifications

Setup

Customize navigation

Show all

Back to Licenses

Dynamics 365 Customer Service Digital Messaging add-on

You own at least 1 subscription for this product. [Manage subscription details](#)

Licenses

25 available

0 assigned of 25 total

Users

Manage and view licenses and apps for your users. Manage group-based licenses in the [Azure portal](#).

+ Assign licenses Export users Refresh

Name	Email
This page is empty	

Assign your first licenses to users to see them in this list

Assign

Assign licenses to **Yves Kerwyn** **Emmar**

Search for users in your organization or enter a name to search for users. You can assign up to 20 users at a time.

Turn apps and services on or off

Dynamics 365 Customer Service D

Dynamics 365 Customer Service D

Next

Proceed to [Provision Omnichannel for Customer Service](#)

Setting up sharepoint integration for document management

Before we can save documents in our D365 Sales we need to setup our sharepoint integration.

Go to **Advanced Settings** in your Dynamics environment.

Go to **Settings>System>Document Management**

Here we have to click on **Configure Server-Based SharePoint Integration**

Follow the steps, you'll have to give the link to your sharepoint environment which is xxx.sharepoint.com

Click **Finish** once you've done this.

Next go to **Document Management Settings**

Again copy the link to your sharepoint environment on this screen:

D365 Sales LinkedIn Integration

Go to **Advanced Settings** in your dynamics environment.



Next, go to **Settings>Business Management**



Now go to **LinkedIn Sales Navigator**



Follow the instructions. The installation will take a couple of minutes.

After the installation, you'll have to click on **Go to Configuration**



This will bring you back to the D365 Settings where you'll have to go back to the **LinkedIn Sales Navigator**

Following screen will pop up:



Make sure to **Enable Sales Navigator integration**

Now you're ready to use Sales Navigator in your D365 Sales environment.

Introduction

Using multiple accounts in Microsoft Edge has been made possible by Microsoft. You can switch easily by using **following button** in the Edge window:



Setting up a new profile in Microsoft Edge

To add a new profile to your browser **click on the above button**, there you have to select **Add profile**.



Now Click **Add**.



A new window will pop up. Click **Confirm**.

Now you'll see an empty browser window where you'll have to go back to the **profile button** in the right top corner of your screen (see above). Now Click **Sign In**.



Now the following screen will pop up where you'll have to **fill in your e-mail address** of your microsoft account:



Important to note here is that you'll have the choice of either choosing a "Microsoft account" or a "Work or school account".

Microsoft account: typically consists of a consumer account (hotmail, outlook...)

Work or school account: These are the accounts you've created in the setup phase of creating a new trial account (which uses "onmicrosoft.com" or other work e-mail addresses through Microsoft).

Selecting your active profile

Underneath you'll see the different active accounts you can currently select:



In the above example you see that the current active account is the Trial Account, underneath you can see the Work account. To switch between accounts, you just have to select the account you want to be using. A new window will then pop up with your currently selected active account. Now you have 2 windows open, each with a different active account.

#Altering your Active profile

The profile you've created under "Setting up a new profile in Microsoft Edge" usually has a default name such as "Profile 2, Profile 3...". To make it more comprehensive this can be changed by clicking on **Manage profile settings**:



Here you can edit the name of your profile by **clicking on the three points next to the sign in button**.



More settings can be adapted in this screen such as passwords, Payment info, Addresses... Or you can even remove your profile.

Setup Power Virtual Agents and Omnichannel for Customer Service

See: <https://neilparkhurst.com/2020/01/01/omnichannel-for-customer-service-and-power-virtual-agents/>

Add Power Virtual Agents trial

In the Microsoft 365 admin center navigate to **Billing | Purchase services** and search for **Power Virtual Agent**:

Milernas-XPC

Purchase services

Select up to three products for a detailed comparison.

Product 1 Product 2 Product 3 Compare products

Business apps

Boost employee productivity with apps that power your organization. Build automate processes and tasks, plan and track your projects, and create organization charts, maps, and workflows - all to support your business.

Product	Description	From	To
Power Virtual Agent	Base license that provisions 2000 sessions per tenant per month	€843.30 addon/month	€843.30
Power Apps Portals login capacity add-on	Power Apps Portals allow organizations to extend business processes to employees and external users	€168.70 addon/month	€168.70
Power BI	Power BI serves departments across the organization	From €84.30	From €84.30

Click the **Power Virtual Agent** tile and click the **Get free trial** button in the next screen:

Milernas-XPC

Purchase services

[Purchase Services](#) / Power Virtual Agent

Power Virtual Agent

Base license that provisions 2000 sessions per tenant per month

No results found.

- Home
- Users
- Groups
- Billing
 - Purchase services
 - Your products
 - Licenses
 - Bills & payments
 - Billing accounts
 - Payment methods
 - Billing notifications
- Setup

Customize navigation

Show all

Next click the **Try now** button:

 Admin

Check out
confirm your order

Power Virtual Agent Trial | 1 month term
25 add-on licenses

[Try now](#)

[Cancel](#)

And finally click the **Continue** button:

order receipt

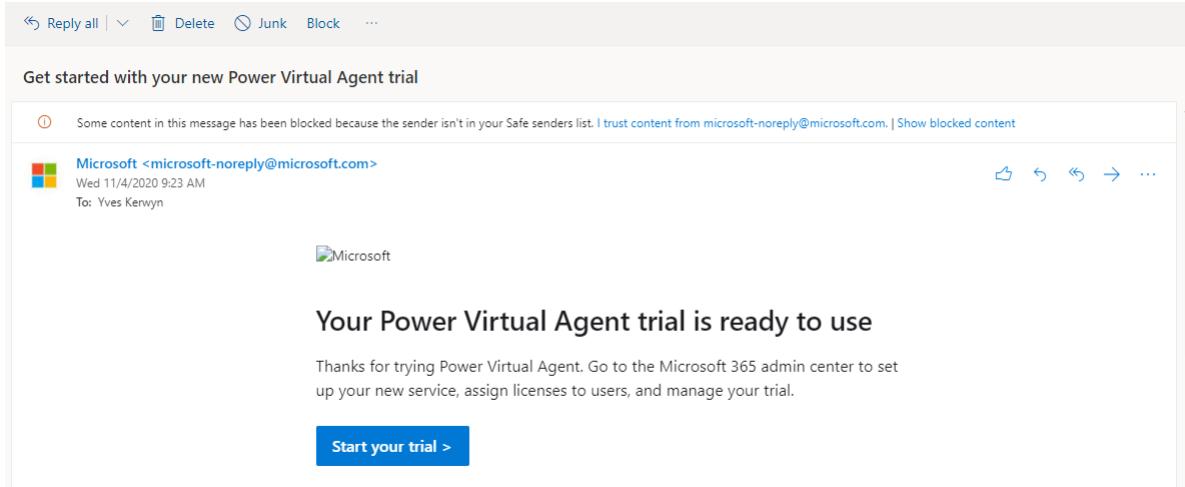
Your confirmation number is: d1eb69f7-e8d0-4786-afcc-1ffe307ad284

[Continue](#)

Order details

Power Virtual Agent Trial | 1 month term
25 add-on licenses

As a result you will receive an e-mail:



The screenshot shows an email message with the following details:

- From:** Microsoft <microsoft-noreply@microsoft.com>
- Date:** Wed 11/4/2020 9:23 AM
- To:** Yves Kenwyn
- Subject:** Get started with your new Power Virtual Agent trial
- Message Content:**

Some content in this message has been blocked because the sender isn't in your Safe senders list. I trust content from microsoft-noreply@microsoft.com. | Show blocked content

Your Power Virtual Agent trial is ready to use

Thanks for trying Power Virtual Agent. Go to the Microsoft 365 admin center to set up your new service, assign licenses to users, and manage your trial.

[Start your trial >](#)

Create bot

Click the **Start your trial >** button in the e-mail you received, this will bring you to details of the trial you just added to your tenant:

[Home](#)[Users](#)[Groups](#)[Billing](#)[Purchase services](#)[Your products](#)[Licenses](#)[Bills & payments](#)[Billing accounts](#)[Payment methods](#)[Billing notifications](#)[Setup](#)[Customize navigation](#)[Show all](#)

Milernas-XPC

Your products

**Power Virtual Agent Trial**

Free • Commercial direct • Trial • Status: Active

Licenses

25

available of 25 (0 used)

[Purchase subscription](#)[Assign users](#)

Billing

Free trial subscrip

Expiring on 12/4/20

[Extend trial](#)

Add-ons

[Partner](#)

Add-ons provide additional functionality that is associated with this subscription. Currently, this sub

Navigate to <http://powerva.microsoft.com/>:

Power Virtual Agents | Contoso Bot

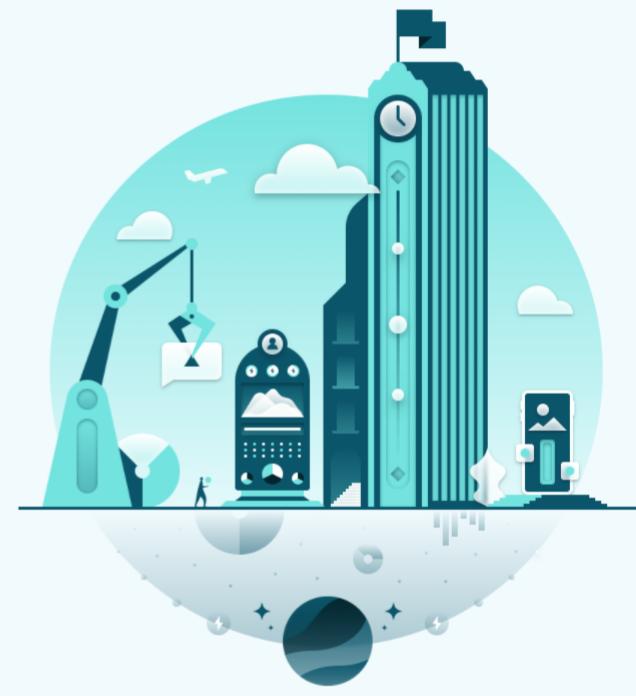
Test bot

Track between topics

Reset

Contoso Bot

Chat



Type your message

[Create topics and test your bot](#)

[Use slot filling and built-in entities to save automation time](#)

[Sign in directly from within your bot](#)

[Publish your bot to a website](#)

Hide bot

Give your first bot a name, specify a language and make sure to select your the environment where you setup the Dynamics 365 apps:

- Home
- Topics
- Entities
- Analytics
- Publish
- Manage

Hide bot

Test bot

Track between topics

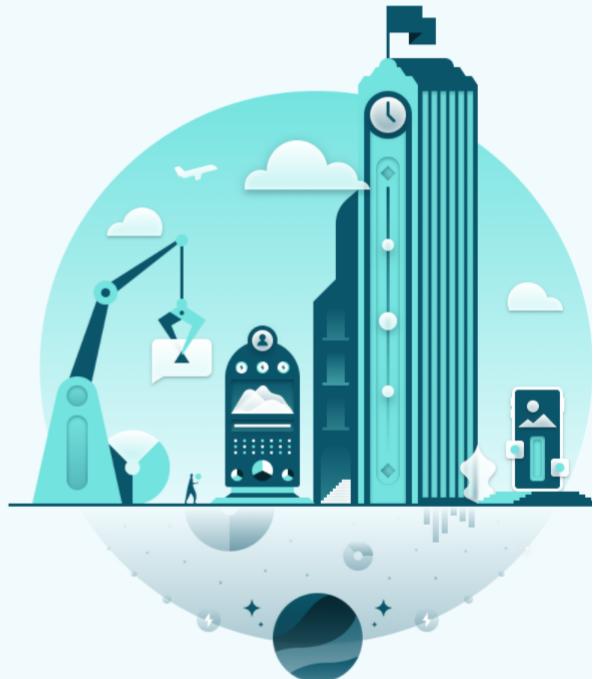
Reset

Chat



Contoso Bot

Get started



Type your message

- [Sign in directly from within your bot](#)
 - [Publish your bot to a website](#)
 - [Get topic suggestions from webpages](#)
 - [Use analytics to improve the performance of your bot](#)
- [View all videos](#)

When you click the **Create** button you bot will be created:

- Home
- Topics
- Entities
- Analytics
- Publish
- Manage

Hide bot

Test bot

Track between topics

Reset

Chat

Type your message 

Contoso Bot

Get started

Creating your bot

- Sign in directly from within your bot
 - Publish your bot to a website
 - Get topic suggestions from webpages
 - Use analytics to improve the performance of
- [View all videos](#)

Once created click the **Settings** gear in the top right corner and click the **Transfer to agent** link:

Test bot X

Track between topics Reset

Chat P

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.

Type your message Send

Hide bot

Demo Bot

Get started

Trigger Phrases(0) Add trigger phrases

Message

One second le me look that up

1. Author topics

Start by editing the topics provided with your bot or create the topics that best fit your business.

[Customize your greeting](#)

[Go to Topics](#)

[Learn more](#)

[Power Virtual Agents documentation](#)

Product videos

- [Create topics and test your bot](#)
- [Use slot filling and built-in entities to save automation time](#)
- [Sign in directly from within your bot](#)
- [Publish your bot to a website](#)
- [Get topic suggestions from webpages](#)
- [Use analytics to improve the performance of your bot](#)

[View all videos](#)

☰

Home Topics

Test bot

Track between topics

Reset

Demo Bot

Get started

Chat

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.

Type your message 

Hide bot

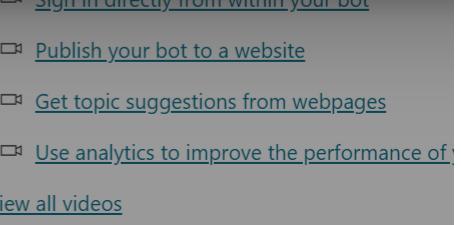
Settings

General Transfer to agent System fallback

Transfer to agent

Connecting to a customer engagement a [Learn more about hand-off](#)

 Dynamics 365
Omnichannel for
Customer Service



- [Sign in directly from within your bot](#)
- [Publish your bot to a website](#)
- [Get topic suggestions from webpages](#)
- [Use analytics to improve the performance of your bot](#)
- [View all videos](#)

Click Next:

≡
Home
Topics

Test bot

Track between topics

Reset

Demo Bot

Get started

Transfer to agent

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.

Settings

General

Transfer to agent

System fallback

Privacy statement

By clicking Next, you acknowledge that your bot will be deployed outside Microsoft's geo boundaries. This includes Government Cloud regions and the [Omnichannel for Customer Service](#) and the [Microsoft 365 Business Premium](#).

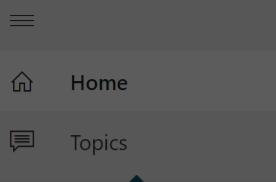
Hide bot

Type your message



- [Sign in directly from within your bot](#)
 - [Publish your bot to a website](#)
 - [Get topic suggestions from webpages](#)
 - [Use analytics to improve the performance of your bot](#)
- [View all videos](#)

In the next screen click the [Azure App registration link](#):



Test bot

Track between topics

X
Reset

Demo Bot

Get started

Transfer to agent

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.

X

Chat

Settings

General

Transfer to agent

System fallback

Enter Power Virtual Agents App

This Application ID will allow Omnichannel for

Follow these steps:

1. Go to [Azure App registration](#).
2. Find the App registration for Power Virtual Agents.
3. Copy the **Application ID** of this App registration.
4. Return to this page and paste the Application ID.

Power Virtual Agents Application ID

Enter ID

Not sure how to create a new App registration?

↳ [Sign in directly from within your bot](#)

↳ [Publish your bot to a website](#)

↳ [Get topic suggestions from webpages](#)

↳ [Use analytics to improve the performance of your bot](#)

[View all videos](#)

Type your message



Hide bot

Click + New registration:

Home >

App registrations ⚙

[+ New registration](#) [Endpoints](#) [Troubleshooting](#) [Download](#) [Preview features](#) | [Got feedback?](#)

i Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph. We will continue to provide support for existing features in ADAL and Azure AD Graph. [Learn more](#)

[All applications](#) [Owned applications](#) Start typing a name or Application ID to filter these results

This account isn't listed as a registered application.

[View all applications](#)Give your app registration a name and click **Register**.

[Home](#) > [App registrations](#) >

Register an application

* Name

The user-facing display name for this application (this can be changed later).

 ✓

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (Milernas-XPC only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web	▼	e.g. https://myapp.com/auth
-----	---	-----------------------------

By proceeding, you agree to the Microsoft Platform Policies [↗](#)

[Register](#)

Copy the **Application (client) ID:



Home

Topics

Test bot

Track between topics 

Demo Bot



Chat

Get started

Transfer to agent

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.

Settings

General

Transfer to agent

System fallback

Enter Power Virtual Agents App

This Application ID will allow Omnichannel for

Follow these steps:

1. Go to [Azure App registration](#).
2. Find the App registration for Power Virtual Agents.
3. Copy the **Application ID** of this App registration.
4. Return to this page and paste the Application ID.

Power Virtual Agents Application ID

adba00cb-c5b8-4e9e-a073-00d400bc0436

Not sure how to create a new App registration?

↳ [Sign in directly from within your bot](#)

↳ [Publish your bot to a website](#)

↳ [Get topic suggestions from webpages](#)

↳ [Use analytics to improve the performance of your bot](#)

[View all videos](#)

Type your message



Hide bot

Click **Next** again



Home

Topics

Test bot

Track between topics 

Demo Bot

Reset

Get started

Transfer to agent

Settings

General

Transfer to agent

System fallback

Enable Microsoft Teams

Power Virtual Agents uses Microsoft Teams to
Select **Next** and we'll enable Microsoft Teams

Make the bot your own! Click "Topics"
when you're ready to get started.

In 5 minutes, you can design your first bot
conversation, test it, and share it with your
team.

Chat

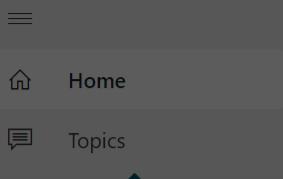


Type your message

Hide bot

Wait a little:

- [Sign in directly from within your bot](#)
 - [Publish your bot to a website](#)
 - [Get topic suggestions from webpages](#)
 - [Use analytics to improve the performance of your bot](#)
- [View all videos](#)



Test bot

Track between topics

X
Reset

Demo Bot

Get started

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.

Chat

X

Settings

Transfer to agent

General

Transfer to agent

System fallback

Enable Microsoft Teams

Enabling

Hide bot

Choose your environment and wait again a little:

Type your message



- ↳ [Sign in directly from within your bot](#)
- ↳ [Publish your bot to a website](#)
- ↳ [Get topic suggestions from webpages](#)
- ↳ [Use analytics to improve the performance of your bot](#)

[View all videos](#)



Home

Topics

Test bot

Track between topics



Demo Bot



Get started

Transfer to agent

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.

Chat



Settings

General

Transfer to agent

System fallback

Connecting to Omnichannel

→ [Sign in directly from within your bot](#)

→ [Publish your bot to a website](#)

→ [Get topic suggestions from webpages](#)

→ [Use analytics to improve the performance of](#)

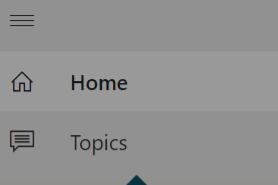
[View all videos](#)

Type your message



Hide bot

When finished closed the Settings window:



Test bot
Track between topics

Reset

Demo Bot

Get started

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.



Chat



Settings

General

Transfer to agent

System fallback

Transfer to agent

Connecting to a customer engagement a
[Learn more about hand-off](#)

Your bot connected successfully. Go to [Overview](#)

Dynamics 365 Omnichannel (

Status

Connected

Configuration

- Go to [Omnichannel for Customer Service](#)
- Learn [how to configure](#) Omnichannel
- Learn [how to disconnect](#) from Omnichannel

Environment

CE Trial

<https://m3l-ce.crm4.dynamics.com/>

Refresh

Disconnect



Type your message

Hide bot

Navigate to [Topics](#):

- [Sign in directly from within your bot](#)
 - [Publish your bot to a website](#)
 - [Get topic suggestions from webpages](#)
 - [Use analytics to improve the performance of your bot](#)
- [View all videos](#)

Power Virtual Agents | Demo Bot

☰

Test bot X

Home Track between topics

Topics Reset ⋮

Chat ✖

Make the bot your own! Click "Topics" when you're ready to get started.

In 5 minutes, you can design your first bot conversation, test it, and share it with your team.

Power Virtual Agents | Demo Bot

☰

Test bot X

Home Track between topics

Topics Reset ⋮

Chat ✖

+ New topic  Suggest topics

Click "+ New topic" ✖

Existing (12) **Suggested (0)**

Name

User Topics (4)

- Lesson 1 - A simple topic
- Lesson 2 - A simple topic with a condition and
- Lesson 3 - A topic with conditions, variables
- Lesson 4 - A topic with conditions, variables

System Topics (8)

- Escalate
- End of Conversation
- Confirmed Success
- Confirmed Failure
- Goodbye
- Start over
- Thank you
- Greeting

Type your message ▶

 Hide bot

Click the Escalate topic:



- ≡
- Home
- Topics
- Entities
- Analytics
- Publish
- Manage

Hide bot

Test bot

Track between topics

Reset

Chat +

Type your message ▶

+ New topic Suggest topics

Click "+ New topic"

Existing (12) Suggested (0)

▼ Name

▼ User Topics (4)

Lesson 1 - A simple topic

Lesson 2 - A simple topic with a condition and

Lesson 3 - A topic with a conditions, variables

Lesson 4 - A topic with a conditions, variables

▼ System Topics (8)

Escalate

End of Conversation

Confirmed Success

Confirmed Failure

Goodbye

Start over

Thank you

Greeting

Click the Go to authoring canvas button:

- Home
- Topics
- Entities
- Analytics
- Publish
- Manage

 Hide bot

Test bot

Track between topics

 Reset 

Chat 

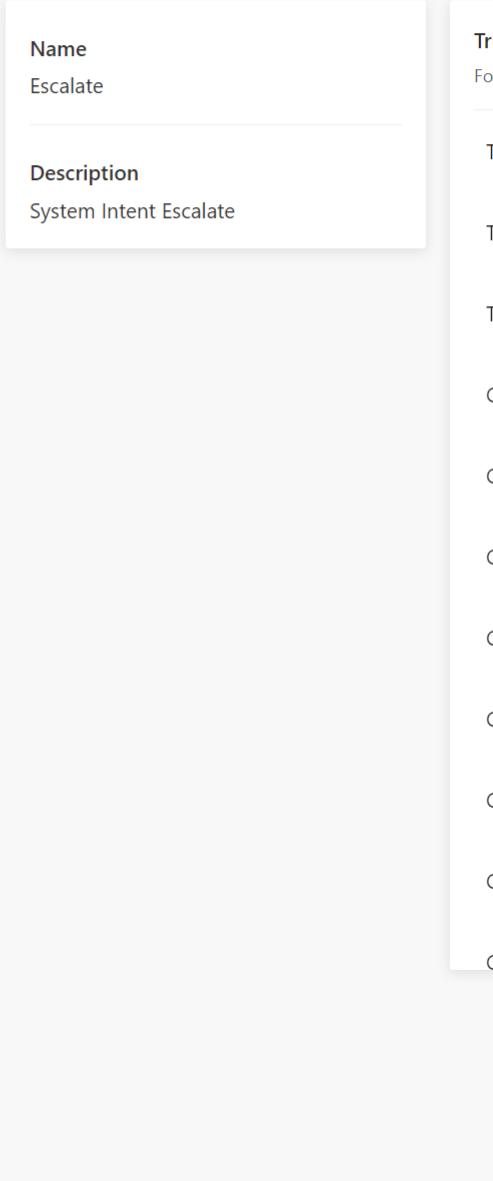
Type your message 

Escalate

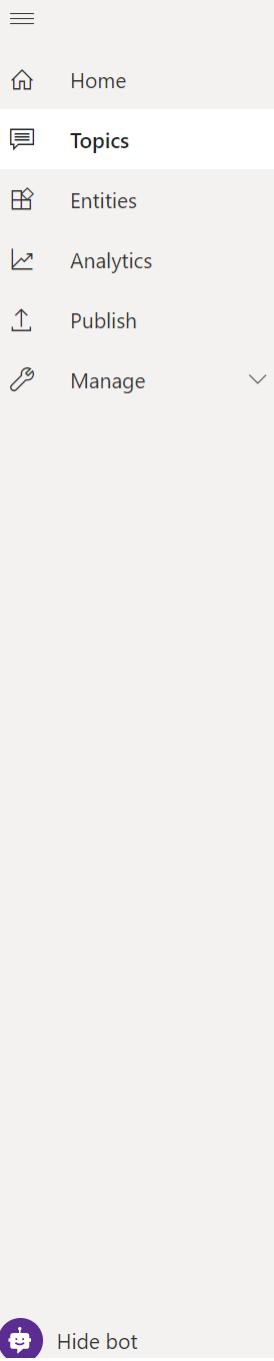
Setup Analytics

Name
Escalate

Description
System Intent Escalate



Delete the Message node:



Test bot

Track between topics

Reset ⚙

Chat

Type your message ➤

This block contains a test interface for a bot. It includes a toggle switch for tracking between topics, a reset button, a 'Chat' header, a message input field, and a send button.

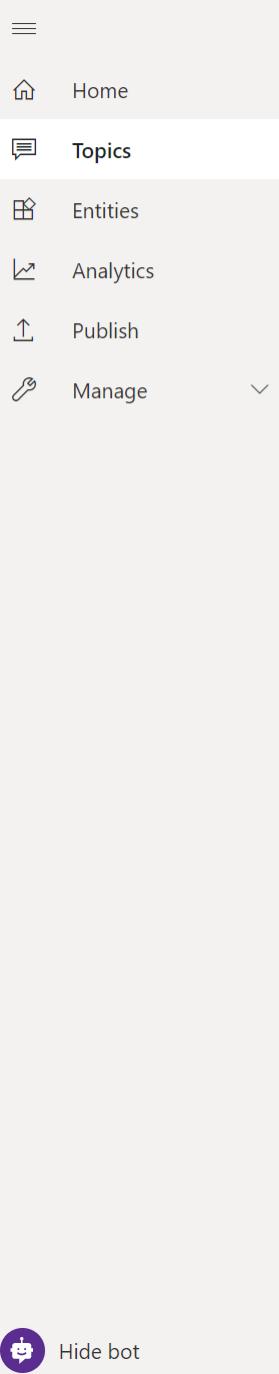
Escalate

⋮

+ ⚙ 🔍 ⌂ {x}

A panel titled 'Escalate' with a dropdown menu and a toolbar containing icons for add, settings, search, and close.

Add a new node as shown:



Test bot X

Track between topics ↻ Reset ⋮

Chat ⎙

Type your message ▶

Escalate

+ ↗ 🔍 ⏷ {x}

Hide bot

Enter the text the agent should see when the conversation is transferred:

- ≡
- Home
- Topics
- Entities
- Analytics
- Publish
- Manage

Hide bot

Test bot

Track between topics

⟳ Reset ⋮

Escalate

Chat



Type your message



Click Save

Publish the bot

Navigate to [Publish](#):



Home

Topics

Entities

Analytics

Publish

Manage

Test bot

Track between topics

Reset



Chat

Type your message



Publish

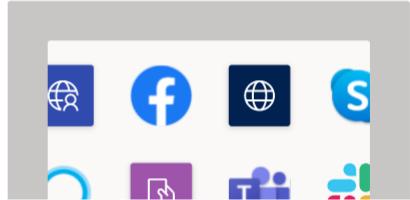
Excited to activate your bot? Publish it with a single click.

↑ Publish

Share your bot

After you publish, try out your bot on the [demo website](#).

Optimize your bot



Configure channels

Set up channels for your bot. Check this page frequently to see updates on new channels.

[Go to Channels](#)

Hide bot

Click **Publish** and confirm to publish the latest version.

Power Virtual Agents | Demo Bot

- Home
- Topics
- Entities
- Analytics
- Publish**
- Manage

Hide bot

Test bot

Track between topics

Reset

Chat

Type your message 

Publish

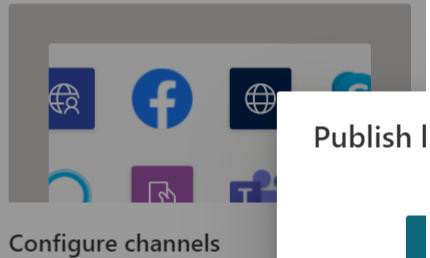
Excited to activate your bot? Publish it with a single click.

 **Publish**

Share your bot

After you publish, try out your bot on the [demo website](#).

Optimize your bot



Configure channels

Set up channels for your bot. Check this page frequently to see updates on new channels.

[Go to Channels](#)

Omnichannel Administration

Navigate to **Apps** in the **Power Apps Maker Portal** and start the **Omnichannel Administration** app from there:

- [Home](#)
- [Learn](#)
- Apps**
 - [Create](#)
 - [Data](#)
 - [Flows](#)
 - [Chatbots](#)
 - [AI Builder](#)
 - [Solutions](#)

+

[New app](#)
▼
Edit
▶ Play
🔗 Share
▢ Monitor
🗑 Delete
⚙️ Settings

Apps

Apps Component libraries (preview)

Name	Modified
M3L Customer Portal	... 23 h ago
Portal Management	... 2 h ago
Omnichannel for Customer Service	... 1 wk ago
Omnichannel Administration	... 1 wk ago
Channel Integration Framework	
Field Service	
Field Service Mobile	
Connected Field Service	
Project Resource Hub	

>Edit
▶ Play
🔗 Share
▢ Monitor
🗑 Delete
⚙️ Settings

Navigate to **Bots** in the **Omnichannel Administration** app and click the bot you just created:

Dynamics 365 | Omnichannel Administration

Home Recent Pinned

Show Chart Refresh Email a Link Flow Flow Run Report

Bot agents ▾

✓ Full Name ↑ ↓

Virtual Agent (Demo Bot)

Entity Records Chat SMS Facebook LINE Twitter WeChat WhatsApp (preview) Custom Microsoft Teams

Navigate to **Queues & Users | Queues** and click **New**:

Give the new queue a name, set the priority to 1 and click **Save**:

≡

Save Save & Close New Flow

Home Recent Pinned

Channels

- Entity Records
- Chat
- SMS
- Facebook
- LINE
- Twitter
- WeChat
- WhatsApp (preview)
- Custom
- Microsoft Teams

Queues & Users

Queues

Users Bots Skills

New Queue

Summary

SUMMARY

Name	* Demo Bot queue
Priority	* 1
Queue type	* Messaging
Owner	*  Yves Kerwyn

By using this feature, you acknowledge that this feature is in preview and you agree to the [Preview Terms](#). [Learn more](#)

Operating Hours ---

Remove yourself and any other user that might be listed from the Users:



Home



Recent



Pinned

Channels



Entity Records



Chat



SMS



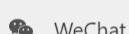
Facebook



LINE



Twitter



WeChat



WhatsApp (preview)



Custom

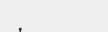


Microsoft Teams

Queues & Users



Queues



Users



Bots



Skills



Save

Save & Close

New

Delete

Refresh

Approve Email

Reject Email

! Omnichannel configuration changes take up to 15 minutes to reflect.

Demo Bot queue

Queue

Summary Related

SUMMARY

Name * Demo Bot queue

Priority * 1

Queue type * Messaging

Owner * Yves Kerwyn

By using this feature, you acknowledge that this feature is in preview and you agree to the [Preview Terms](#). [Learn more](#)

Operating Hours ---

Users (Agents)

✓ Full Name ↑

✓ Yves K

Click Add Existing User.

Save Save & Close New Delete Refresh Approve Email Reject Email

! Omnichannel configuration changes take up to 15 minutes to reflect.

Demo Bot queue

Queue

Summary Related

SUMMARY

Name	* Demo Bot queue
Priority	* 1
Queue type	* Messaging
Owner	*  Yves Kerwyn
<p>By using this feature, you acknowledge that this feature is in preview and you agree to the Preview Terms Learn more</p>	
Operating Hours	---

Users (Agents)

✓ Full Name

Entity Records Chat SMS Facebook LINE Twitter WeChat WhatsApp (preview) Custom Microsoft Teams

Queues & Users

Queues **Users** Bots Skills

Add the Demo Bot you created earlier:

Save Save & Close New Delete Refresh Approve Email Reject Email

Home Recent Pinned

Omnichannel configuration changes take up to 15 minutes to reflect.

Demo Bot queue

Queue

Summary Related

SUMMARY

Name	* Demo Bot queue
Priority	* 1
Queue type	* Messaging
Owner	*  Yves Kerwyn

By using this feature, you acknowledge that this feature is in preview and you agree to the [Preview Terms](#). [Learn more](#)

Operating Hours ---

Users (Agents)

Full Name

Queues & Users

Queues

Users

Bots

Skills

Work Distribution Management

Work Streams

Agent Experience

Quick replies

Agent scripts

Active

Click Save & Close:



←

Save

Save & Close

+ New

Delete

⟳ Refresh

✉ Approve Email

✉ Reject Email

Home

Recent

Pinned

Channels

Entity Records

Chat

SMS

Facebook

LINE

Twitter

WeChat

WhatsApp (preview)

Custom

Microsoft Teams

Queues & Users

Queues

Users

Bots

Skills

Work Distribution Management

Work Streams

Agent Experience

Quick replies

Agent scripts

Macros

Demo Bot queue

Queue

Summary Related

SUMMARY

Name * Demo Bot queue

Priority * 1

Queue type * Messaging

Owner * Yves Kerwyn

By using this feature, you acknowledge that this feature is in preview and you agree to the [Preview Terms](#). [Learn more](#)

Operating Hours ---

Users (Agents)

✓ Full Name ↑

Virtual

Navigate to Work Distribution Management | Workstreams and click New.

Home

Recent

Pinned

Channels

Entity Records

Chat

SMS

Facebook

LINE

Twitter

WeChat

WhatsApp (preview)

Custom

Microsoft Teams

Queues & Users

Queues

Users

Bots

Skills

Work Distribution Management

Work Streams

Agent Experience

Active Work Streams ▾

✓ | Name ↑ ▾

Custom messaging workstream

Facebook workstream

LINE workstream

Live chat workstream

Microsoft Teams workstream

Twitter workstream

WeChat workstream

WhatsApp workstream

1 - 8 of 8 (0 selected)

Specify a name for the workstream, select the Live chat channel and click Save:

≡ ⌂ Save ⌂ Save & Close + New ⌂ Flow ▾

Home Recent Pinned

Channels

- Entity Records
- Chat
- SMS
- Facebook
- LINE
- Twitter
- WeChat
- WhatsApp (preview)
- Custom
- Microsoft Teams

Queues & Users

- Queues
- Users
- Bots
- Skills

Work Distribution Management

Work Streams

New Work Stream

Work Distribution Context Variables Skill Attachment Rules Routing Rules Templates Smart

General information

Name	* Demo Bot chat workstream
Channel	* Live chat
Capacity	* 30
Auto-close after inactivity	* 5 minutes

Work distribution mode

① Choose the status to apply to this work stream

Allowed Presence

Enable selecting push-based work streams

Enable Agent Affinity

Click the **Routing Rules** tab and click **+ Add**:



Home



Recent



Pinned

Channels

Entity Records

Chat

SMS

Facebook

LINE

Twitter

WeChat

WhatsApp (preview)

Custom

Microsoft Teams

Queues & Users

Queues

Users

Bots

Skills

Work Distribution Management

Work Streams

Agent Experience

Quick replies

Agent scripts

Macros



Save



Save & Close



New



Deactivate



Delete



Refresh



Assign

Demo Bot chat workstream

Work Stream

Work Distribution

Context Variables

Skill Attachment Rules

Routing Rules

Templates

Smart

Rule items

✓ | Name ▾

Description ▾

Give the new rule a name, select the queue you just created and click Save & Close:

≡

Save Save & Close Flow

New Rule Item

General

General Information

Name	* Demo Bot rule
Owner	* Yves Kerwyn
Work stream	* Demo Bot chat workstream
Queue	* Look for Queue
Description	

Condition

AND OR Ungroup

+ Condition

Entity Records

Chat

SMS

Facebook

LINE

Twitter

WeChat

WhatsApp (preview)

Custom

Microsoft Teams

Queues & Users

Queues

Users

Bots

Skills

Work Distribution Management

Work Streams

Agent Experience

Quick replies

Agent scripts

Macros

Active

Navigate to **Channels | Chat** and click **+ New**.

Active Chat Widgets

Name ↑

Customer Portal Chat

Give chat channel a name and change the work stream to the work stream you just created:

New Chat Widget

General settings Surveys Conversation options Design Location

General information

Name	* Demo Bot Chat
Language	* English - United States
Agent display name	Full name
Authentication settings	---

File attachments

- Enable file attachments for customers
- Enable file attachments for agents

Chat Transcripts

- By enabling this your organization Government Clo [Privacy Statement](#)
- Allow download of transcript
- Allow email of transcript

Work distribution

Work stream

Look for Work stream

Work Streams

- Demo Bot chat workstream 11/4/2020 10:51 AM
- Live chat workstream 10/25/2020 3:34 AM
- + New Work Stream

Proactive chat

Enable Proactive Chat

Change View

Copy the code snippet that was generated for you bot chat widget:

Home Save Save & Close New Deactivate Delete Refresh Assign

Demo Bot Chat

Chat Widget

General settings Automated messages Surveys Conversation options Design Location

General information

Name	* Demo Bot Chat
Language	* English - United States
Agent display name	Full name
Authentication settings	---

File attachments

Enable file attachments for customers

Enable file attachments for agents

Work distribution

Work stream	* Demo Bot chat workstream
-------------	----------------------------

Chat Transcripts

By enabling this your organization's Government Cloud Privacy Statement

Allow download of transcript

Allow email of transcript

Proactive chat

Enable Proactive Chat	* No
-----------------------	------

Queues & Users

Queues Users Bots Skills

Work Distribution Management

Work Streams

Active

Portal Management

In the Power App Maker Portal navigate to Apps and from there start the **Portal Management** app.



Home

Learn

Apps

Create

Data

Flows

Chatbots

AI Builder

Solutions

[+ New app](#) [Edit](#) [Play](#) [Share](#) [Monitor](#) [Delete](#) [Settings](#)

Apps

Apps Component libraries (preview)

Name	Modified
M3L Customer Portal	... 1 d ago
Portal Management	... 2 h ago
Omnichannel for Customer Service	Edit
Omnichannel Administration	Play
Channel Integration Framework	Share
Field Service	Monitor
Field Service Mobile	Delete
Connected Field Service	Settings

In the **Portal Management** app navigate to **Content | Web Templates** and click the **Home** web template:

Home Recent Pinned

Website Websites Page Templates Redirects Site Markers Site Settings Website Bindings Settings

Content Content Snippets Entity Forms Entity Lists Shortcuts Web Files Web Forms Web Link Sets Portal Languages Web Pages Web Templates

Security Contacts Portals

Show Chart New Delete Refresh Email a Link Flow

Active Web Templates ▾

Name	Source
Faceted Search - Facets Template	{% raw %} <script id="facets-view-results" type="text/x-haml
Faceted Search - Main Template	{% assign search_page = sitemarkers['Search'] %} {% assig
Faceted Search - Paging Template	{%raw%} <script id="facets-view-pagination" type="text/x-
Faceted Search - Results Template	{% assign openTag = '{' %} {% assign closingTag = '}' %} {
Faceted Search - Sort Template	{%raw%} <script id="search-order-select" type="text/x-ha
Footer	{% assign knowledge_url = sitemarkers['Knowledge'].url %}
Forum - Most Popular Threads	{% assign count = count default: 5 %} {% assign forums_u
Full Page without Child Links	{% include "Layout 1 Column" %}
Get Help	{% assign knowledge_url = sitemarkers['Knowledge'].url %}
Header	{% assign homeurl = website.adx_partialurl %} <div class=
Home	{% assign forums_sm = sitemarkers["Forums"] %} <section
Home - Popular Topics	<div id="topics" class="container home-section"> <h3>{
Knowledge Base - Home	{% extends 'layout_1_column' %} {% block main %} {% incl
Knowledge Management - Most Popular Articles	{% assign showdescription = showdescription default: fal
Knowledge Management - Most Recent Articles	{% assign count = count default: 5 %} {% assign language
Knowledge Management - Top Rated Articles	{% assign count = count default: 3 %} {% assign language
Languages Dropdown	<ul class="dropdown-menu" role="menu"> {% for langua
Layout 1 Column	<div class="container"> <div class="page-heading"> {% t
Layout 2 Column Wide Left	<div class="container"> <div class="page-heading"> {% t
Layout 3 Column	<div class="container"> <div class="page-heading"> {% t

All # A B C D E F G H I J

1 - 39 of 39 (0 selected)

Paste the script from the bot chat widget here as follows and click **Save & Close**:

≡

Home

Recent

Pinned

Website

- Websites
- Page Templates
- Redirects
- Site Markers
- Site Settings
- Website Bindings
- Settings

Content

- Content Snippets
- Entity Forms
- Entity Lists
- Shortcuts
- Web Files
- Web Forms
- Web Link Sets
- Portal Languages
- Web Pages

Web Templates

Security

Contacts

Portals

Active

Save

Save & Close

New

Deactivate

Delete

Refresh

Email a Link

Home

Web Template

General Related

Name * Home

Website * Customer Self-Service

Source

```
1 1 % assign forums_sm = sitemarkers["Forums"] %  
2 2  
3 3 <section class="page_section section-landing">  
4 4   <div class="container" role="main">  
5 5     <div class="row ">  
6 6       <div class="col-md-12">  
7 7         <h1 class="section-landing-heading">%< editable snippets 'Home/Title' default:  
8 8           <h2 class="section-landing-sub-heading">%< editable snippets 'Home/Subtitle' de  
9 9             {< include 'Search' %}</div>  
10 10</div>  
11 11</div>  
12 12</div>  
13 13 <div class="layer_down">&ampnbsp</div>  
14 14</section>  
15 15 <section class="page_section section-knowledge">  
16 16   <div class="layer_up">&ampnbsp</div>  
17 17   <div class="container">  
18 18     <div class="content-home">  
19 19  
20 20     <!--  
21 21       The script below has been pasted in from Omnichannel.  
22 22  
23 23       This is for the Demo Bot chat.  
24 24  
25 25       In all other pages the Live chat is used, here we override this default only for th  
26 26     -->  
27 27  
28 28 <script id="Microsoft_Omnichannel_LCWidget" src="https://oc-cdn-public-eur.azureedge  
29 29  
30 30     <h2 class="blue_border">%< editable snippets "Home/MostPopularHeading" default:  
31 31       {< include 'Knowledge Management - Most Popular Articles' showdescription: true %}  
32 32     </div>  
33 33     <div class="row sidebar-home no-lr-margins">  
34 34       <div class="col-md-4">%< include 'Knowledge Management - Most Popular Articles' %</div>  
35 35       <div class="col-md-4">%< include 'Knowledge Management - Most Recent Articles' %</div>  
36 36       <div class="col-md-4">%< include 'Knowledge Management - Top Rated Articles' %</div>
```

Set up Customer Service Enterprise

Go to: <https://dynamics.microsoft.com/en-us/pricing/#CustomerService>

Click **Customer Service Enterprise**: <https://dynamics.microsoft.com/en-us/customer-service/overview/>

Scroll down to Pricing:

Click the **Get started>** button in the Customer Service Enterprise tile.

Click the **Sign up for a free trial** link.

This leads you to the regular trials page: <https://trials.dynamics.com/Dynamics365/Signup/service>

Make sure to select the option **Create your own trial**:

Click the **Complete Setup** button.

Once done you'll be redirected to *My Apps page: <https://seris3650.crm4.dynamics.com/main.aspx?forceUCI=1&pagetype=apps>

In the **Power Platform admin center** you will discover that a new environment got added:

Checking the Dynamics 365 apps for that environment shows that Customer Services and Omnichannel got installed:

Also when you check the Dynamics 365 apps under Resources (at the tenant level) you will see that Omnichannel got added:

Click **Manage** from the context menu:

Click **+ Add environment** and select the demo environment:

Add chat:

Don't add SMS:

Don't add Social channels:

Don't add Teams:

Click **Finish** on the confirmation screen:

Check: <https://theCRM.Ninja/installing-omnichannel-for-dynamics-365-trial-part-i/>

<https://docs.microsoft.com/en-us/dynamics365/omnichannel/try-channels>

Create new demo environment

The following steps are meant to add a production environment to the tenant, so next to the trial tenant that was setup so far...

Navigate to the legacy Dynamics 365 admin center: <http://admin.powerplatform.com/>



Click the **Instance to configure** link at the bottom of the instances lists:



Click the **CONFIGURE** icon, this brings up following message:



Click the option to **Use the old configuration experience**: <https://port.crm4.dynamics.com/G/Instances/InstancePicker.aspx?Redirect=False#>

Select **Sales**, **Customer Service** and **Field Service**, set a name and URL, and click **Configure**:



As a result you will see the new production environment (instance) added to the list:



And after a while also all solutions are available to be configured:



From here you can click the **Open** icon:



Next

If not already done first [Assigning Licenses](#), otherwise go directly to [Assigning Roles](#).

Add new users to Dynamics trial

Invite the user to visit <https://trials.dynamics.com/>

Have them select the needed App, specify their e-mail address and phone number and click the **GET STARTED >** button.

...

Click **Join**.

Select the option **All of these**:

Click the **Continue** button.

The administrator (you) will receive an e-mail:

Click the **approve the request** link in the e-mail:

Once approved the new user can click the **View trial instances** in the last message:

Steps as received from Microsoft support:

- Sign in with the email and password of the NEW USER
- You will be directed to the “Personalize your experience” page.
- On the next page, sign in, using the credentials of the NEW USER
- Once you are signed-in, you will be directed to a page with all the trial instances in your domain
- Select “Join an existing organization” then click on the “Join” button on the right
- The owner of the trial account will receive an email to approve the new user.
- Select the app that best fits your need, if you want all the apps then select all of these
- Global admin needs to approve the user.

Enable disabled users

When accessing a Dynamics application you might get following error:

In order to enable the user go to the **Microsoft 365 admin center**: <https://admin.microsoft.com/>

Go to Active users:

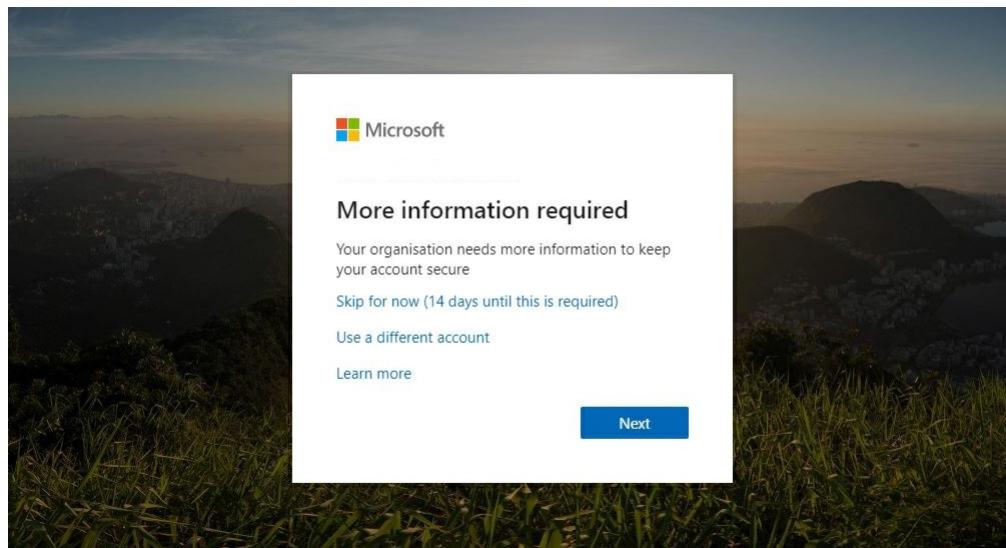
For the user experiencing the issue navigate to **Manage groups**:

Click **+Add memberships**, select the group and click **Save**:

See: <https://support.microsoft.com/en-gb/help/3210340/you-encounter-an-error-trying-to-sign-in-to-dynamics-365-online>

Disable security defaults

In order to get rid of following:



See: <https://www.slashadmin.co.uk/office-365-your-organisation-needs-more-information-to-keep-your-account-secure/>

Setup Dynamics 365 Sales Trial

The below documented steps are best used after having created a Microsoft 365 trial, as documented in [Start with a Microsoft 365 E5 Trial](#).

As a result of following the below steps you will only get a **Dynamics 365 Sales** trial instance. In many cases you will also want **Customer Service** and **Field Service**. If that is the case for you, rather follow the steps as documented in [Add the Dynamics 365 Customer Engagement Plan Trial](#).

Alternatively you can also create a Sales trial without first creating a Microsoft 365 trial, as documented in [Initial Setup](#).

Go to Dynamics 365 Trial home page and select the **Sales** tile: <https://trials.dynamics.com/>



Scroll down and specify the work email address you created when setting up your Office 365 trial, specify your phone number and click **GET STARTED**:



In case you (tried to) install the customer engagement apps as documented in [Setup Dynamics 365 Customer Engagement Trial](#) you will get a message that you already have a license, in that case just click through..

In the next page click **Create**:



After a while you will get to the Dashboard of your Dynamics 365 Sales trial:



In stead of ending up with the previous screen after installation, you also might end-up here:



From there you can click to the **Sales Hub** app, or any other of the applications such as the **Customer Service Hub** or **Field Service** apps.

You can also check the **Power Platform admin center** via <https://admin.powerplatform.microsoft.com>:



Here you see that a new trial environment got installed.

Click the newly added environment:



Clicking **See all** brings up more details:



Or clicking **Dynamics 365 app** in the **Resources** section reveals all the apps that got installed as part of this trial:



So even while you only installed the Sales app you also got the **Customer Service** and the **Field Service** apps.

Next

[Create new demo environment](#)

Set Dynamics 365 Customer Engagement Trial

The below documentation is outdated, and is replaced by [Setup Dynamics 365 Customer Engagement Trial](#).

The below documented steps are best used after having created a Microsoft 365 trial, as documented in [Start with an Office 365 E5 Trial](#).

However, note that the below steps will fail you, as shown in the very last screenshot here below, so in any case rather go for the option to install trial versions of the engagement apps one by one, starting with the Dynamics 365 Sales app, as documented in [Setup Dynamics 365 Sales Trial](#).

As a result of following the below steps you **should** (but will not get) a **Dynamics 365 Sales** , **Dynamics 365 Customer Service** and a **Dynamics 365 Field Service** trial all installed in the same environment.

In case you only need a **Dynamics 365 Sales** trial instance you rather follow the steps as documented in [Setup Dynamics 365 Sales Trial](#)

Go to Dynamics 365 Trial home page: <https://trials.dynamics.com/>

WARNING the instructions that follow didn't give the results as expected the last time

Instead of clicking **Sign up here** here, as documented in what follows, check whether you can add it through the Microsoft 365 admin center next time, just to see what the best approach is...

After first having read the above warning, select **Create your own trial** here:

Scroll down and click the **Sign up here** link:

This will bring up following dialog:

Click **No, continue signing up**.

In the next screen choose the option **Yes, add it to my account**:

Click **Try now**:

And then **Continue**:

As a result you will receive a **Get started with your Dynamics Customer Engagement Plan Trial** mail:

From this e-mail click the **GET STARTED TODAY** link, which will bring you (you will need to wait 3-5 minutes) to **Microsoft 365 admin center**:

Here you can follow the steps as documented below, but rather skip immediately to the assign licenses section.

Click the **Go to guided setup** button in the **Finish setting up Dynamics 365 Customer Engagement Plan** tile, which will bring you to the **Microsoft 365 setup wizard**:

Clicking the **Advanced setup** link in the upper right corner brings you to following page:

Click **Guided setup**.

This basically brings you back to the same page from which you clicked **Advanced setup** - so rather useless:

Click **Continue**.

Click **Do this later** - since you already created these users before.

Click **Go to admin center**.

All the last steps were not really meaningful...

Assign licenses

Go to **Active Users** and assign the **Dynamics 365 Customer Engagement Plan** license to all the users:

Click **Dynamics 365 Customer Engagement Plan** and then **Save changes**:

Also see: [Assigning Licenses](#)

Add Dynamics 365 Apps

Go to the **Power Platform admin center**: <https://admin.powerplatform.microsoft.com/>

Click the default environment:

Click **+ Add database, Enable Dynamics 365 apps**, and select **Customer Service, Field Service and Sales Enterprise**, and then click **Add**:

This will not work for the **default** environment:

So first we need to create a new environment:

If you choose **trial** you will not be able to enable the Dynamics 365 apps:

So we need to choose **Production**:

Change the URL to something you can easily remember, here we have chosen the same name as what we have chosen for the Microsoft 365 trial:

Enable Dynamics 365 apps, select **Customer Service**, **Field Service** and **Sales Enterprise**, and then click **Save**:

And this doesn't work:

So conclusion: don't use this approach to setup a trial of the customer engagement apps, rather follow the steps as documented in [Setup Dynamics 365 Sales Trial](#)

Next

Follow the steps documented in [Assigning Roles](#).

Business Central Setup

It is recommended, but not required, to first activate an Office 365 E5 trial as documented in [Microsoft 365 E5 Trial](#).

In case you opt to skip the E5 trial setup you will need to specify a work email address in the below steps.

<https://trials.dynamics.com/Dynamics365/Signup/BusinessCentral>

Adding users

In the Microsoft 365 admin center click **Active users** under the **Users** section of the left navigation pane:

Click **Add a user** and fill out the requested info (ready4D365!!) in the first step:

In the next step select the licenses assign to your new user:

In the **Optional settings** step just accept the defaults and click **Next**:

In the last step review the summary and click **Finish adding**:

Dynamics Immersion Experience

Go to the [Office 365 Portal](#).

Logon:

- Username: hans@milemasxpc3003.onmicrosoft.com
- Password: ready4D365!!

Marketing Setup

Go to the Marketing trial page: <https://trials.dynamics.com/Dynamics365/marketing>

Enter the e-mail of your admin account and hit **Get Started**:

On the next page click **Sign in**:

You will get a message that you already have a license for Marketing:

After clicking **OK, got it** setting will start:

After a while you will be requested to specify the physical street address of your organization, enter "Groeningenlei 16, 2550 Kontich" and click **Get started**:

In case the address is not yet on record for you will get invited to accept some permissions, do this with the **Consent on behalf of your organization** checked:

Also accept the similar next permissions request:

And next provide you consent for the following:

You're done:

Click **Begin**.

Adding users

Other users can also start a trial.. this will result in an e-mail asking you to approve/reject the request to join the marketing trial by following the same procedure as outlined above starting by going to <https://trials.dynamics.com/Dynamics365/marketing>:

After clicking **Get started** they'll need to sign in:

They will receive a confirmation that their organization/company already have a free trial of Dynamics 365 Marketing:

After having clicked on **OK, got it** they will get navigated to the following page, where they need to click **Join**:

This brings up following dialog window where they need to click **Continue**:

As a result they will get a confirmation that their request to join was sent to the owner of the trial:

After the request to join has been accepted the requesting user can click the **View trial instances** link in the last dialog which will bring him here:

Clicking **Open** brings them to the Marketing trial:

Environments

Go to Power Platform admin center: <https://admin.powerplatform.microsoft.com/environments>

Notice that a new environment has been created as a result of installing a trial of the Marketing app.

Click the newly added environment:

Click **Edit**:

Update both the name and URL:

This will actually change nothing, but rather will help avoid confusing when adding other applications to the environments.

Optionally you can add the marketing app to the environment where the sales app was created. In order to do so go to the overview page of all Dynamics 365 apps that are installed in this environment:

Click ***Install app**, choose the **Dynamics 365 Marketing Application** from the list and click **Next**:

Click OK:

You will be requested to enter the physical street address of your organization, enter "Groeningenlei 16, 2550 Kontich" and click **Setup**:

Next

Following the steps documented in [Customer Service Setup](#)

Customer Service Setup

In case you installed a trial of the Dynamics 365 Customer Engagement Plan as documented in [Add the Dynamics 365 Customer Engagement Plan Trial](#) you can skip this step and proceed to [Customer Portal Setup](#).

In case you previously installed a trial of the Sales application as documented in [Setup Dynamics 365 Sales Trial](#) you will have the Customer Service app installed as part of the Sales app installation.

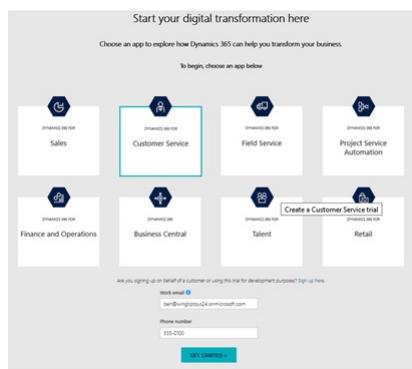
However that doesn't suffice...

You will need to install a trial of the Customer Service app in a separate environment, since we'll need the **Omnichannel for Customer Service** bits at a later stage of the demo setup, and the only way to get them added to your tenant is by adding trial of the Customer Service app.

The crucial point in the steps below is to choose for the option to **Create your own trial** instead of the default option to join existing organization (=environment).

By following the steps below you will get a new Customer Service trial in a separate environment. Once installed in a new environment the bits become available to add to your other environments - especially the Omnichannel bits.

Go to <https://trials.dynamics.com/Dynamics365/Signup/service>:



Select the option to **Create your own trial**:

Change the name of the new trial environment that will get created to something meaningful, such as adding a postfix **-customer-service**:

Click the **Complete Setup** button.

After a while:

As a result a new trial environment will been added to your tenant as you can verify in the **Power Apps admin center**: <https://admin.powerplatform.microsoft.com/environments>

Also when checkin the resources add the tenant level you will see that **Omnichannel for Customer Service** has been added - which we will configure later: <https://admin.powerplatform.microsoft.com/resources/applications>

Next

Follow the steps documented in [Customer Portal Setup](#).

Customer Portal Setup

Create the portal

Go to the Power Apps Maker Portal: <http://make.powerapps.com/>

Switch to the environment where you set up the Dynamics 365 trials:

It is easy to make a mistake here, e.g. if you created Marketing trial you typically end up with a second environment, make sure not to use that environment

Navigate to the **Create** and scroll down to the **Start from template** section:

Select the **Customer self-service** template, provide the requested information and **Create**:

The screenshot shows the Power Apps Maker Portal interface. On the left, there's a sidebar with options like Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder, and Solutions. Under the 'Create' section, there's a 'Start from template' section with 'All' and 'Office' filters. A preview of the 'Customer self-service' template is shown, featuring a dark header with 'CONTOSO CUSTOMER SELF-SERVICE' and a 'Most Popular' section with links to articles about 3D printers and audio equipment. To the right of the preview, there are form fields for 'Name *' (M3L Custom), 'Address *' (m3l-customer), and 'Language' (English). Below the preview, descriptive text explains what a customer self-service portal does, and a 'Learn more' link is provided. At the bottom, there are links for 'Power Apps Training for Office', 'Community', and 'Customer self-service'.

Once the portal is ready to use, click **Settings** from the context menu of the portal under **Apps**:

This opens open a side pane:

In this side pane click **Site settings** which will open the **Portal Management** app:

Create a portal User

In the **Portal Management** app go to **Contacts**:

Click **New**.

In the new contact switch to the **Portal contact** form:

Create a new contact Sam De Man with e-mail address sam.deman@outlook.com, and for **Company Name** create a new account record (Aliman):

Click Save and than click the **Web Authentication** tab:

Enter **sam** as the username for Sam and enable login:

Click **Create Invitation**:

Check the mailbox of Sam Deman:

Click the link will not work, extra configuration is required...

Instead manually set a password...

Next click **Change Password** in the menu and set a password (samLovesD365!!):

Test the login by visiting the customer portal and clicking Sign-in:

This will open the **Profile** page of Sam:

Next

Follow the steps documented in [Provision Omnichannel for [Provision Omnichannel for Customer Service](#).

Provision Omnichannel for Customer Service

Also see:

- [Try channels in Omnichannel for Customer Service](#)
- [Installing Omnichannel for Dynamics 365 \(Trial\) – Part I](#)
- [Installing Omnichannel for Dynamics 365 \(Trial\) – Part II](#)
- [Omnichannel for Customer Service and Power Virtual Agents](#)

In order to provision Omnichannel we must have a license of the Dynamics 365 Customer Service Digital Messaging add-on. If that is not yet the case first follow the steps as documented in [Add a trial of the Dynamics 365 Customer Service Digital Messaging add-on](#)

Alternatively you can also add a trial license of the Dynamics 365 Customer Service Digital Messaging add-on by adding a Customer Service trial license as documented in [Customer Service Setup](#).

Data access consent

See documentation [Provision Omnichannel for Customer Service](#)

Go to the **Data access consent** URL: <https://go.microsoft.com/fwlink/?linkid=2070932>

Accept the requested permissions:

Via the Microsoft 365 admin center go to the [Dynamics 365 admin center](#):

Provision Omnichannel into your first environment

Go to the Power platform admin center, navigate to the Dynamics 365 apps that haven been installed on the tenant level, scroll down to the **Omnichannel for Customer Service** application and choose **Manage** from the context menu <https://admin.powerplatform.microsoft.com/resources/applications>

Click **OK**:

Accept the requested permissions:

Click + Add environment:

Next you need to select the correct environment, which is tricky, I took the first one guessing that is the first environment that was created when adding the Sales trial:

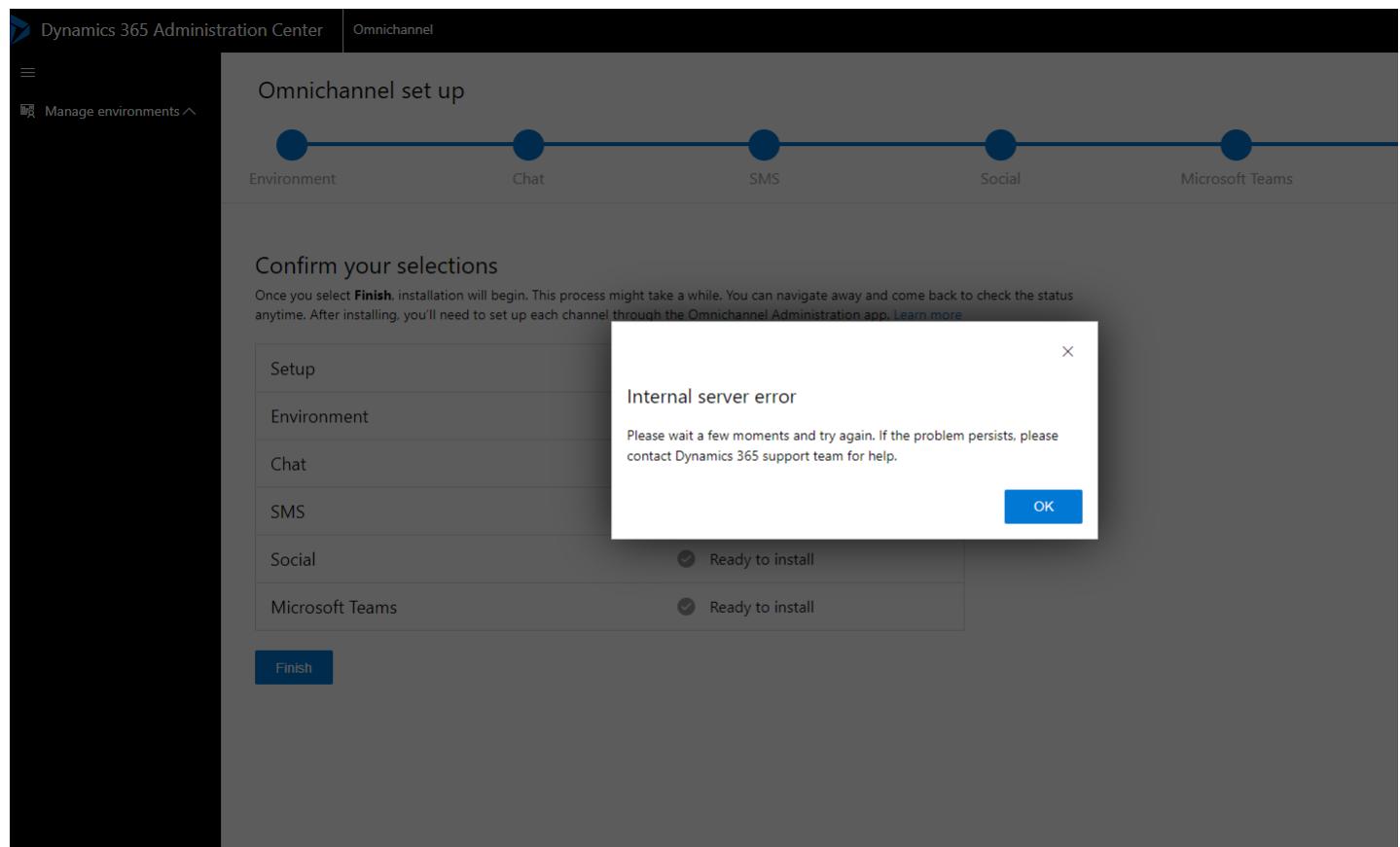
Go through the wizard:

The actual setup can take quiet some time:

Here you see the URL of the environment in which the Omnichannels gets provisioned, clicking it will actually reveal that the first environment in the list was actually the first environment.

Provision takes a very long time, more than one hour...

Last time I got this error:



But click the error away revealed that the installation was still in progress:

Dynamics 365 Administration Center | Omnichannel

Save Close Delete Refresh

Manage environments ▾

CE Trial

Manage CE Trial

Summary Chat SMS Social Microsoft Teams

Omnichannel is being set up. It may take a few hours. You can continue your work in Microsoft Dynamics 365. Closing this page will not impact the setup.

Setup
Environment CE Trial
Chat Setup in progress
SMS Setup in progress
Social Setup in progress
Microsoft Teams Setup in progress

After 1 hour all finished without errors:

Dynamics 365 Administration Center | Omnicchannel

≡ Manage environments ^

CE Trial

Save Close Delete Refresh

Manage CE Trial

Summary Chat SMS Social Microsoft Teams

Setup	
Environment	CE Trial
Chat	✓ Installed
SMS	✓ Installed
Social	✓ Installed
Microsoft Teams	✓ Installed

Also see the following blog: <https://nishantrana.me/2020/06/11/provision-omnichannel-for-dynamics-365-customer-service/>

Also see

- [Omnichannel for Customer Service – Part 1](#)
- [Omnichannel for Customer Service – Part 2](#)

Next

[Configure Chat Widget](#)

Configure Chat Widget

See documentation: [configure a chat widget](#)

Make sure you have followed the steps in [Provision Omnichannel for Customer Service](#).

Go to the **Omnichannel Administration** app via [Power Apps Maker Portal](#) or via the [Dynamics 365 Home](#) - shown hereunder:

Make sure to select the **Omnichannel Administration** app in the correct environment.

Verify whether there is a Live chat workstream listed in the **Workstreams**:

Go to **Channels > Chat**:

Click **New** to create a chat widget:

Specify a name for the widget, here **Customer Portal Chat**, specify **English** as the language, make sure the work stream is configured, and hit **Save**:

Copy the **code snippet** code:

From the **Power Apps Maker Portal** open the **Portal Management** app:

Go to **Content > Content Snippets**, and find the **Chat Widget Code**:

Open the **Chat Widget Code**, go to the **HTML** tab and copy the code snippet here, and click **Save**:

Troubleshooting

- [Clear the server-side cache for a portal](#)

Create user and assign him to Administrators role and then login to the portal with following with https://<portal_path>/_services/about:

- [Chat widget does not load on the portal](#)

Make sure a location record exists - which might not be the case as shown hereunder:

Add a location record - here seris-demo.powerappspartials.com (**DO NOT INCLUDE HTTPS**):

- [Chat widget icon does not load on the portal](#)

Make sure the Logo URL is correct: <https://oc-cdn-ocprod.azureedge.net/livechatwidget/images/chat.svg>

- [Chat not getting initiated on starting a new chat from portal](#)

Initial Setup

To start you basically have two options:

1. First setup your Office 365 trial, as documented in [Start with a Microsoft 365 E5 Trial](#) (the recommended option)
2. Start without an Office 365 trial, and optionally add the Office 365 trial later, as documented in [Adding a Microsoft 365 E5 Trial](#)

Use the below steps if you only need a Dynamics 365 Customer Engagement Plan Trial, without Office 365.

Using Edge create a new profile:

Create a trial

Visit <https://trials.dynamics.com/>:

At the bottom of the page click the **Sign up here** link:

This will popup following screen:

Choose the **No, continue signing up** link in the bottom left corner.

This will bring you to the following registration page:

Fill out the registration form and click **Next**:

This will bring you to page where you are invited to specify a username and tenant name:

Fill out the form and click **Create my account**:

Click **Set up**, this will bring you to the setup page of your free 30-day trial setup:

Here you select **Sales, Customer service, Field service or Project service automation**, or all of these.

Make your choice and click **Complete Setup**.

Once the setup has finished you'll see the following page:

Adding a Microsoft 365 E5 Trial

The below documentation is you the case you already have a Dynamics 365 trial setup and need to add an Office 365 trial to you setup.

In case you need to start from scratch, and don't have any trial active yet, you will want to follow the steps as documented in [Start with an Office 365 E5 Trial](#).

If you setup your environment by following the steps as documented in [Initial Setup](#) you only have the Dynamics 365 Customer Engagement Plan Trial.

In order to add an Office 365 trial to your tenant, go to **Admin** from your [Office 365 Portal](#):

In the **Microsoft 365 admin center** click **Purchase services** from the left navigation pane:

Click the **Microsoft 365 E5** tile:

Then click the **Get free trial** button:

Specify your mobile phone number:

Enter the code you received and click **Start your free trial**:

Click **Try now**:

Clicking **Continue** on the screen about your receipt will bring you back in the **Microsoft 365 admin center**, where you can verify under **Billing | Products & Services** that the Microsoft 365 E5 Trial was added to your tenant:

Assign a Microsoft 365 E5 license to you users.

In the **Microsoft 365 admin center** click **Licenses** in the left navigation pane under the **Billing** section:

Click the **Microsoft 365 E5** licenses:

Click **+ Assign licenses** and enter your name:

After having clicked the **Assign** button you will get confirmation that the license was assigned successfully:

Access your mailbox

As a result the **Outlook** icon will now appear on the [Office 365 Portal](#):

When you access your mailbox for the first time you will need to specify your language and your time zone:

Once saved and after a short while your mailbox is ready to use: