

# Microsoft Customer Digital Experience (CDX)

aka.ms/cdx

Create demo tenants, download step-by-step demo scripts for Microsoft Modern Work, Security and Business Applications products, and conduct immersive sessions with customers.

## **Customer Digital Experiences**

## Interactive digital experiences using fully functional Microsoft 365 environments

### Help your customers understand:



Why

Discover why Microsoft is the right choice for their business



What

Understand what needs to be done to achieve their business goals



How

Learn how to implement, manage, integrate and support Microsoft Cloud products

## **Customer Digital Experiences**

A story telling platform

## **2 Constructs**

**Environments** 

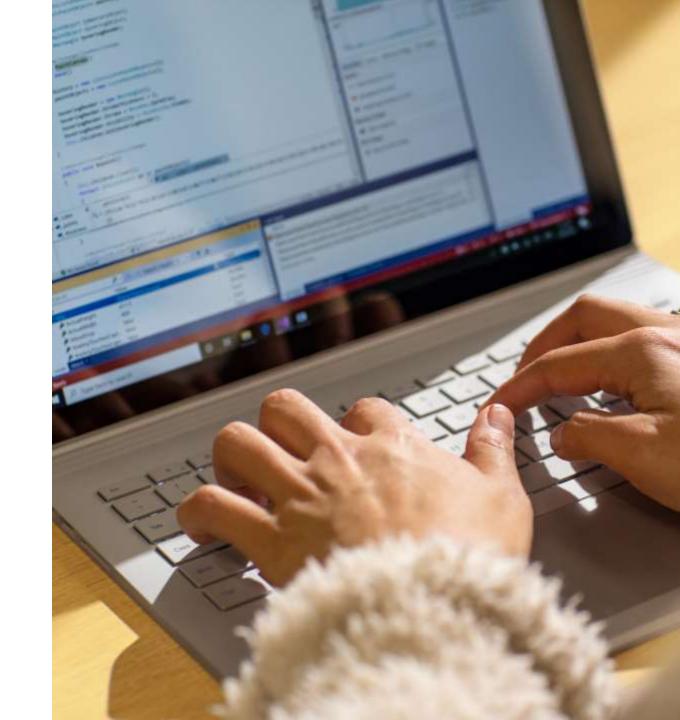
Experiences

## **3 Experience Formats**

**Customer Immersion Experiences** 

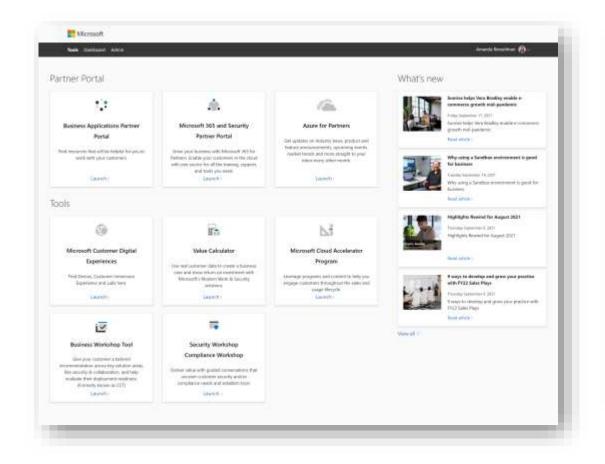
Demos

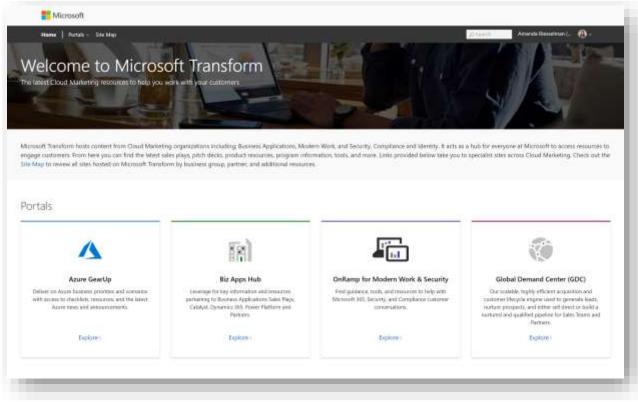
Simulated Demos



## **Transform Platform**

If you visit CDX from Transform.microsoft.com, the landing page will look different for Microsoft employees vs. Microsoft partners and MVPs.





## **CDX How-to**

This deck is to provide guidance to users on how to use Microsoft Customer Digital Experience (CDX) platform. In this deck, you will find:

- How to get access
- Terms of Use
- Experience Types: Demo, Simulated Demo, CIE
- Demo tenant types
- FAQ & Support



# Who has access to CDX?

Microsoft employees, vendors with MSFT domains, Partners, and MVPs all have access to CDX

## Microsoft FTE and Vendors

Access is granted to Microsoft employees and vendors with MSFT domains

Vendors and employees may have limited access to some content in CDX based on their role or organization affiliation



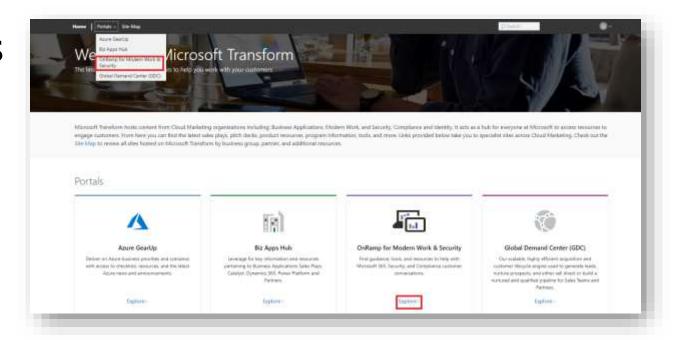
## Microsoft FTE and Vendors access

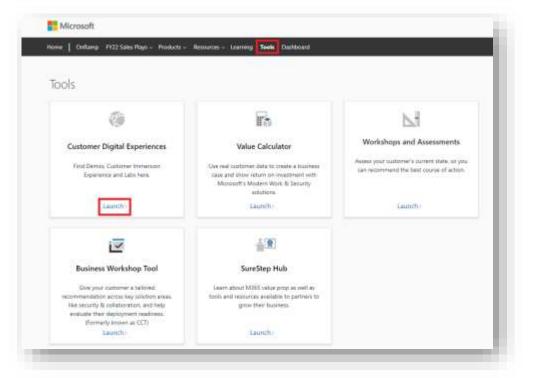
## Accessing CDX from Transform

- Log into transform.microsoft.com
- If prompted to set up a profile, choose the appropriate Segment & Role
- Upon completing your profile, click on Portals > OnRamp for Modern Work & Security
- Click on 'Tools' in the upper navigation bar
- Click 'Launch' on the Customer Digital Experience tile

## Accessing CDX directly

Visit cdx.transform.microsoft.com





## Partners and MVPs

Access is granted to valid Microsoft partners and MVPs

Partners must use a work email account that is enrolled into the Microsoft Partner Center, associated with their MPN account AND authenticated through their work domain's Azure Active Directory. Partner tenants licensed with only a Windows Store for Business subscription will not allow users access to CDX.

An MSA/Live ID is not valid for accessing CDX

MVP users must be current, have an up-to-date NDA on file, and be approved by MVP team

Microsoft Partner Center Help
<a href="https://partner.microsoft.com">https://partner.microsoft.com</a> and click on Support



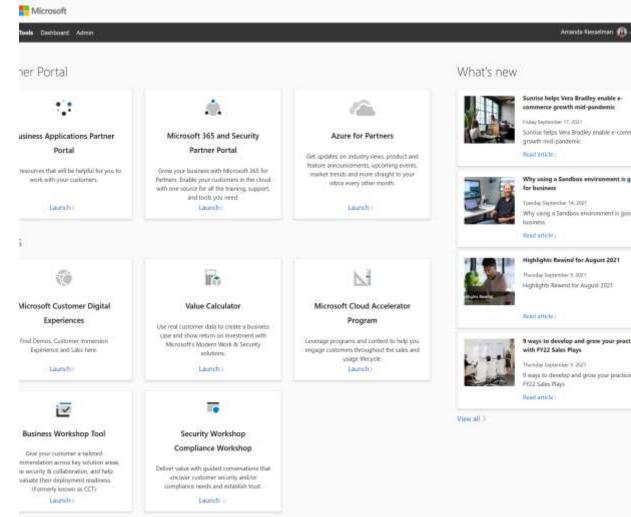
## Partners and MVPs access

## Accessing CDX from Transform

- Open a browser: transform.microsoft.com
  - You may have to use an InPrivate session if you use a different account for MPN than your primary account
- Sign in using your partner account
- If prompted to set up a profile, choose Partner for both Segment & Role
- Upon completing your profile, you can navigate to the CDX home page

## Accessing CDX directly

Visit cdx.transform.microsoft.com





## **CDX Terms Of Use Agreement**

Important: Violations of the Terms of Use can result in a loss of access to CDX

#### CDX - Terms Of Use

Resources and experiences, such as demo tenants and customer immersion experiences, available on the CDX site are for Microsoft employees, MVP (Microsoft Valuable Professional), and Microsoft Partner employees to deliver Microsoft product demonstrations, or individual self-learning activities.

It is not compliant with our terms of use to obtain any resource or experience through CDX that are leveraged for other uses such as software engineering, implementation of customer proof-of-concepts, training courses, 3rd party product sales, or product trials. However, adding, integrating, or configuring 3rd party apps into demo tenants is allowed.

Resources and experiences that are created through CDX and not used for Microsoft product demonstrations or self-learning will not be supported. This includes applying and managing publicly available Microsoft trial licenses.

It is against Microsoft consumer and commercial agreements to leverage CDX resources and experiences for personal or commercial use by Microsoft employees, Microsoft Partners, MVPs, and customers.

Support is provided for tenant usage that follows a published demo guide only. Tenant credentials should not be shared with customers, unless within an official and approved customer immersion experience or lab available from CDX. Resources and experiences obtained from the CDX site remain the property of Microsoft Corporation and we reserve the right to obtain access and repossess at any time.

Adding payment instruments such as credit cards to demo tenants or customer immersion experiences is not permitted. If additional licenses are required, please reach out to the support team to obtain product demo or trial licenses with appropriate business justification. Where payment instruments are added, the tenant will be flagged by the Fraud and Risk team at Microsoft and a case will be opened for follow up.

The CDX site must be accessed using legitimate/real user accounts by Microsoft employees, MVPs, or Microsoft Partner employees. The use of non-user accounts such as fake users, service accounts, or other system accounts on CDX is prohibited.

Microsoft Partners and MVPs failing to adhere to the Terms of Use may be offboarded from the CDX site and other Microsoft Partner programs. Failure of a Microsoft employee adhering to the Terms of Use may result in the Microsoft employee unable to access resources from the CDX site.

- When you first access CDX you will be presented with the Terms of Use for the site. It is
  important to read and understand these terms.
- CDX resources are for delivering Microsoft product demonstrations to customers or individual self-learning activities.
- CDX resources are NOT to be used for any testing, proof-of-concepts, training courses,
   3<sup>rd</sup> party app development, and sales or product trials. Tenant usage is monitored, and violations can result in the immediate loss of access to your tenants and CDX.

# What are CDX Experiences?

CDX offers Customer Immersion Experiences, Demos, and Simulated Demos

## **Experiences for all**

**Customer Types** 

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[8]

#### Demo

A deep one-to-many or one-to-few presentation with little to no audience participation led by product owners or SMES

ITDMs



#### Simulated Demo

A step-by-step, hands-on technical experience for our users and focus on specific scenarios and enablement of features and functionality

CDX offers a series of experiences for all audiences and sales stages.

Experiences in CDX are the primary methods by which a user can demonstrate or learn more about Microsoft tools and products.

#### **Experience profiles**

Customer Immersion Experience (CIE)

A 1-3 hour on-site or virtual experience with highly active participation, led by a professional facilitator

#### Audience

- Enterprise executives, BDMs, ITDMs that meet minimum qualifications.
- 4-20 people

- Practitioners, ITDMs, IT pros, security pros, people involved in tech planning or everyday use.
- Unlimited in number

Time frame

1-3 hours

Can vary

• Can vary, shorter or longer curricula

Location

· Onsite or virtual

 Onsite or virtual, webinar Often featured at conferences/events

#### Experience

- Interactive, story-telling based, "hands on keyboard" with some guided simulation
- Led by Microsoft and partner facilitators
- · Multiple industries
- Used only GA products/features

- Mostly passive, with some guided simulation
- Led by Microsoft and partner facilitators
- Multiple industries
- Can feature non-GA or private preview products/features

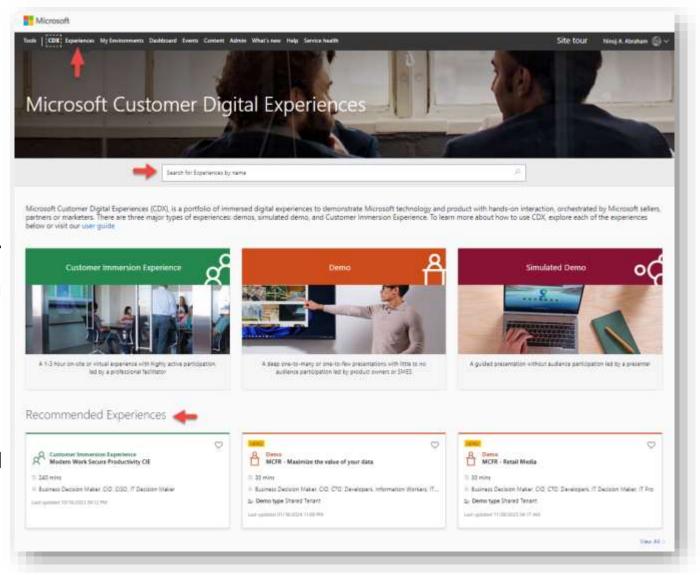
- Mostly passive, with some guided simulation
- Led by proctors
- Multiple industries
- Can feature non-GA or private preview products/features

## How to access an experience

Recommended experiences can be found on the home page based on your user profile.

A full list of all avaiable experiences can be found by following this <u>link</u> or by clicking on the 'Experiences' tab in the upper navigation bar within the CDX site.

If you know the name of the experience you would like to use, you can also search by the Experience name on the CDX homepage.

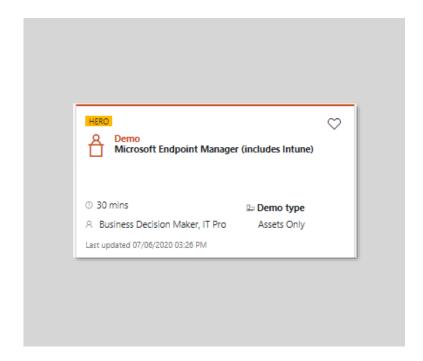


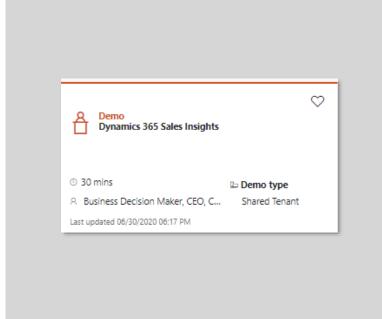
## What is a CDX Demo?

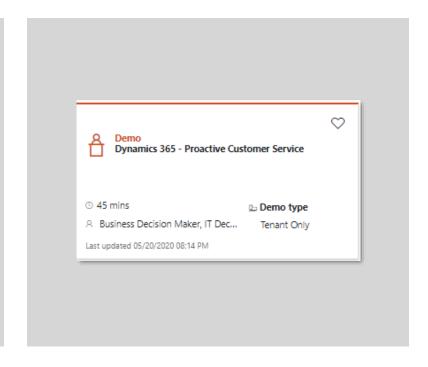
A deep one-to-many or one-to-few presentation with little to no audience participation led by product owners or SMEs

## **Demo Overview**

Coming in a variety of different types, demos make up most experiences available on CDX. There are three different types of Demos offered in CDX.







#### **Assets Only**

Asset Only demos only offer downloadable guides to follow as a stand-alone demo or within a Demo Tenant that is already in your account.

#### **Shared Tenant**

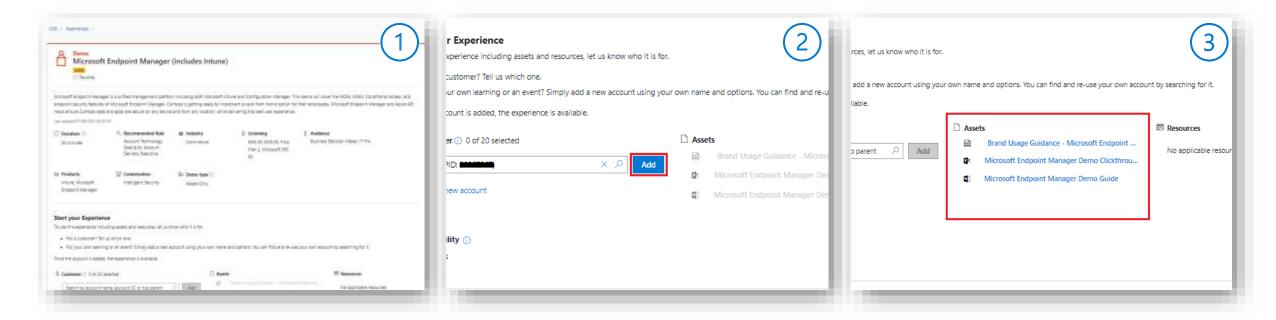
Shared Tenant demos allow you to open a demo environment that is already preconfigured and may contain products and features that may not be available within your own demo tenant.

#### **Tenant Only Demo**

Tenant Only demos provide an easily accessible personal demo tenant that can be used to demo the product that the Experience is about.

## **Assets Only Demos**

Assets Only demos contain downloadable resources that you can use to run or supplement your demonstrations.



Go to the Experiences page and click on the demo you wish to use.

Once on the demo detail page, you will need to add a customer to the Customer field at the bottom of the page. You can search for an existing customer or click '+ Add new Account' to create a new customer profile.

If this is not for a customer, simply search for and select the 'Test' option.

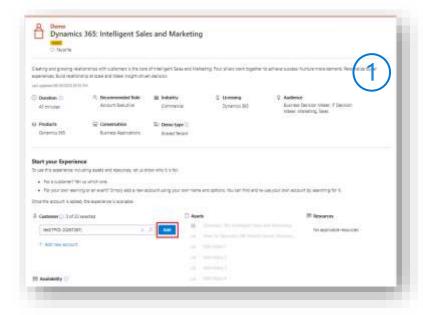
Click 'Add'.

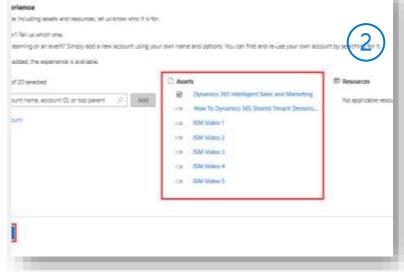
Once a Customer has been added, the assets will be available for download.

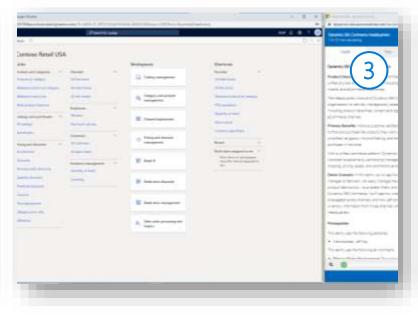
Click on the asset you want to download to initiate the download.

## **Shared Tenant Demos**

Shared Tenant demos allow you to open a demo environment that is already pre-configured for the demo and may contain products and features that may not be available within your own tenants.







Go to the Experiences page and click on the demo you wish to use.

Once on the shared tenant demo detail page, you will need to add a customer to the Customer field. You can search for an existing customer or click '+ Add new Account' to create a new customer profile.

If this is not for a customer, simply search for and select the 'Test' option.

Click 'Add'.

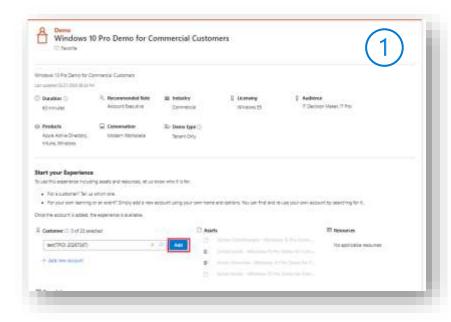
The 'Start' button is now activated and the assets (including a downloadable version of the demo quide) are now available to download.

Click 'Start' to launch the shared tenant in the browser with a guide window on the right-hand side of the screen (far right image).

Some shared tenant experiences have dynamic usernames and passwords that you can only get in the side-by-side guide. On some shared tenant experiences, you can download the guide asset and follow the directions within from a browser tab. This will use the same shared tenant without the side-by-side guide.

## **Tenant-Only Demo**

Tenant-Only Demos provide an easily accessible pre-configured tenant that can be used to demo the product that the specific experience is about.



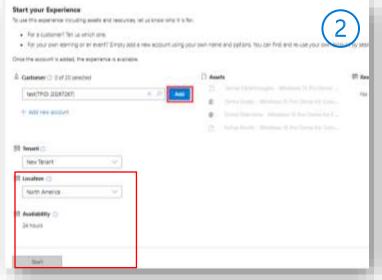
Click on the 'Tenant' Drop-down menu.

If choosing an existing tenant, click 'Start' to open a side-by-side demo window and guide.

If selecting 'New Tenant' you will claim a new tenant for your account.

Select a region for your tenant.

Click 'Start'.



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Standard Colors and Co

Click 'Start' to launch the shared tenant in the browser with a guide window on the right-hand side of the screen (far right image).

If you do not wish to use the side-by-side guide, simply download the guide asset and follow the directions within.

Go to the Experiences page and click on the demo you wish to use.

Once on the Tenant-Only demo detail page, you will need to add a customer to the Customer field at the bottom of the page.

You can search for an existing customer or click '+ Add new Account' to create a new customer profile.

If this is not for a customer, simply search for and select the 'Test' option.

Click 'Add'.

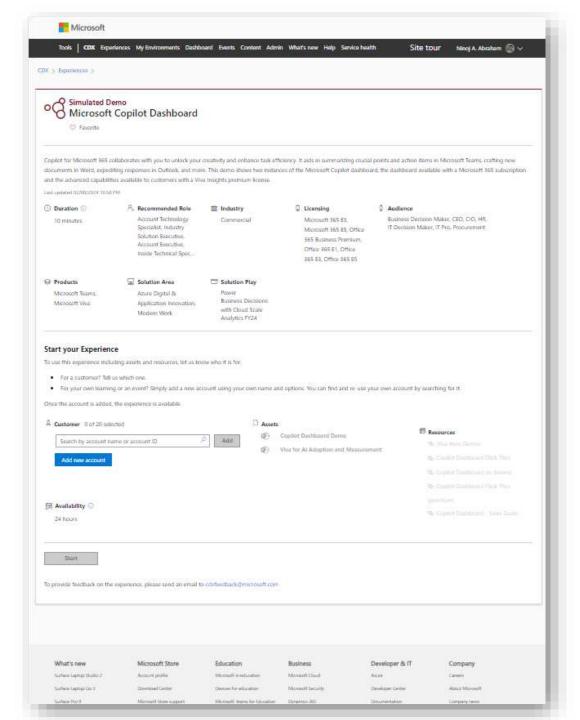
## What is a Simulated Demo?

A step-by-step, hands-on technical experience for our users and focus on specific scenarios and enablement of features and functionality

## **Simulated Demos Overview**

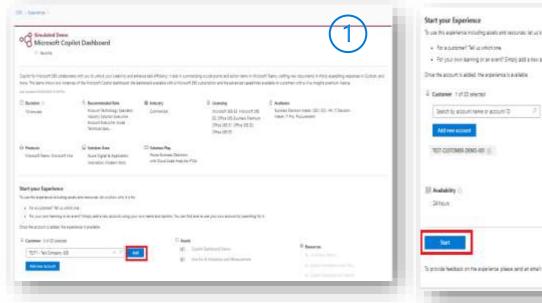
Simulated Demos provide a step-bystep guided presentation for a specific feature of a product or business scenario.

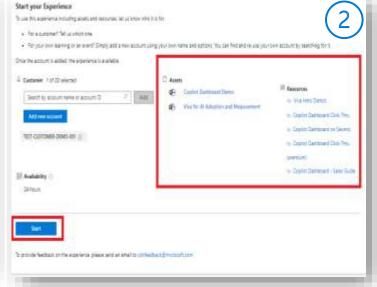
Simulated Demos bring the pivot from one-on-one conversations to one-to-many, especially in supporting virtual training and events.



## **Simulated Demo**

Simulated Demos are available in online formats and are for all audiences: field, partners, and customers.





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Go to the Experiences page and click on the Simulated Demo you wish to use.

Once on the Simulated Demo detail page, you will need to add a customer to the Customer field at the bottom of the page.

You can search for an existing customer or click '+ Add new Account' to create a new customer profile.

If this is not for a customer, simply search for and select the 'Test' option.

Click 'Add'.

The 'Start' button is now activated and the assets/resources are now available to download or click on.

Click 'Start' to launch a full-screen version of the Simulated Demo in a new window, or click on the 'Online Simulated Demo' link under 'Resources' to open the guide in a new tab.

# What is a Customer Immersion Experience (CIE)?

A 1-3 hour on-site or virtual experience with highly active participation, led by a professional facilitator

## **Customer Immersion Experiences Overview**

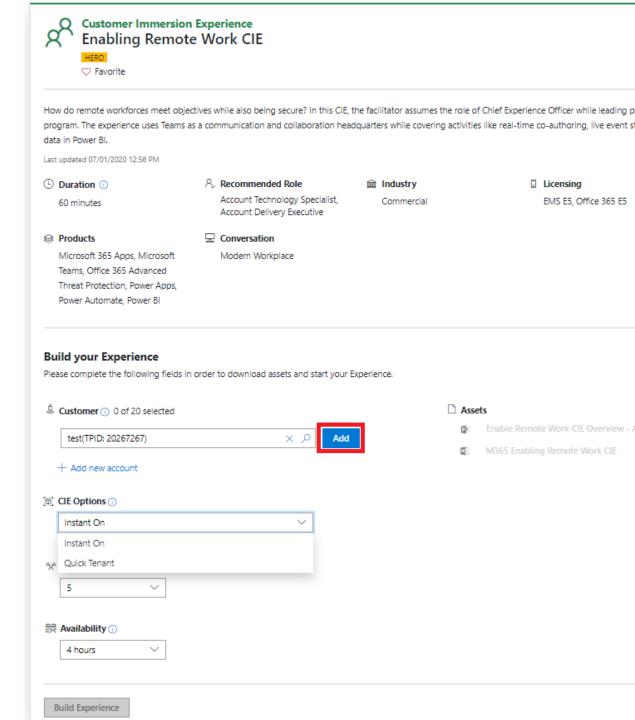
Customer Immersion Experiences (CIEs) are experiences within CDX that allow users to utilize a Microsoft 365 tenant to facilitate a live, interactive demo session.

CIEs use virtual desktops or a quick tenant to allow all participants to log into a live Microsoft 365 environment and interact with each other in real-time using a scenario-based script to demonstrate various Microsoft 365 products.

There are various CIEs to choose from, and each highlight a product or have an industry focus.

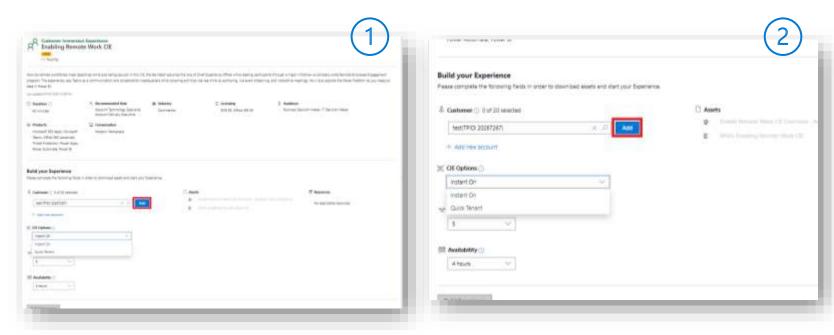
CIEs come in two different options:

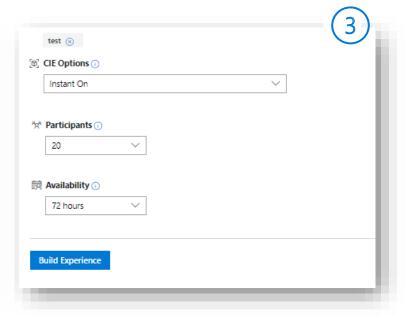
- Instant-On
- Quick Tenant



## CIE

There are various CIEs to choose from, and each one highlights a different product or industry. CIEs come with two different options: Instant-On or Quick Tenant





Go to the Experiences page and click on the CIE you wish to use.

Once on the CIE detail page, you will need to add a customer to the Customer field at the bottom of the page.

You can search for an existing customer or click '+ Add new Account' to create a new customer profile.

If this is not for a customer, simply search for and select the 'Test' option.

Click 'Add'.

You must choose a CIE Option, Quick tenant or Instant-On.

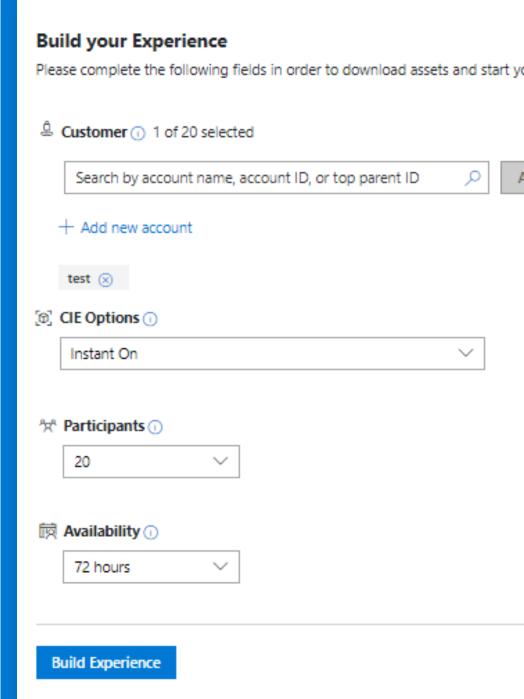
Once you complete the required fields Click 'Build Experience'

It may take up to 10 minutes for the Instant-On format to be ready for use.

## **Instant-On CIEs**

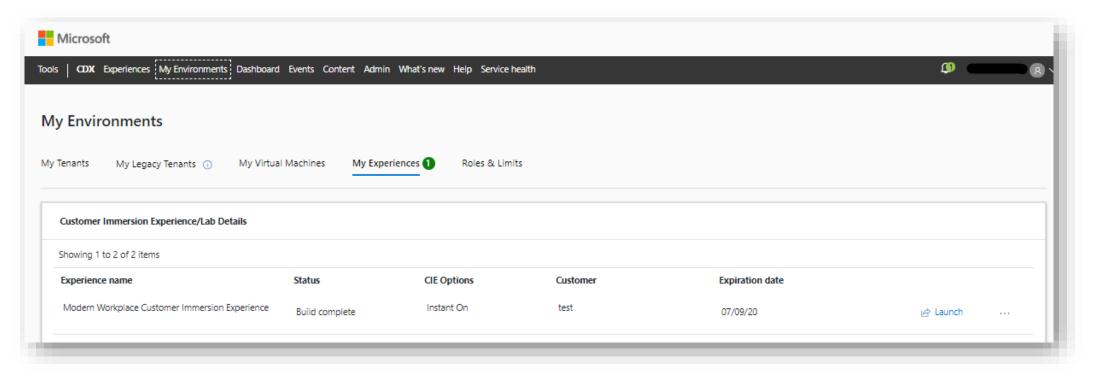
Once you have selected the right CIE for your demo, you will then need to configure your CIE. The required options to start a CIE are as follows:

- Customer- The customer to whom this CIE is being presented. Instant-On CIEs should not be used for testing purposes and only a customer account should be selected.
- CIE Options- Quick tenant or Instant-On.
  - If the Instant-On option is selected, two additional fields are required:
  - Participants how many users will be participating in the CIE (this will determine the number of available users in the Virtual Machine environment).
  - Availability- This determines how long the virtual machines are available.
- Once all the Required Fields have been selected click 'Build Experience'
- After Launching the CIE, you may see a message stating that it may take up to ten minutes before the CIE is available.
- Instant-On CIEs cannot be extended and should only be claimed for the time needed for your customer session.



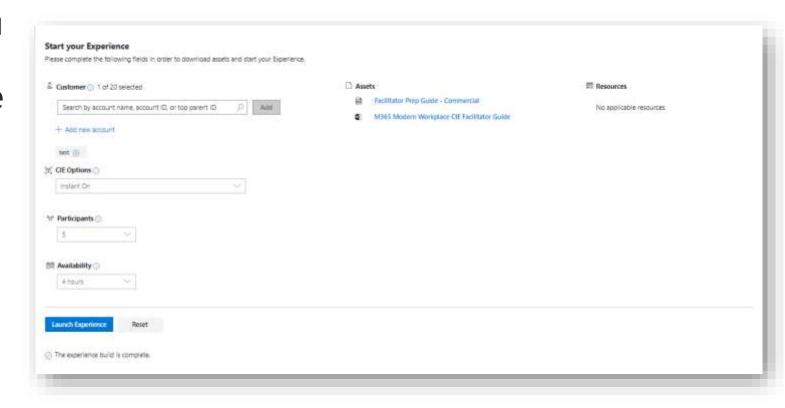
## **Instant On CIEs**

- Once the CIE has built, you will see a notification in the upper right-hand corner of the screen.
- Click on the notification or click on 'My Environments' and then select 'My Experiences'.
- From the 'My Experiences' page, you will have the option to 'Launch' the CIE.



## **Instant On CIEs**

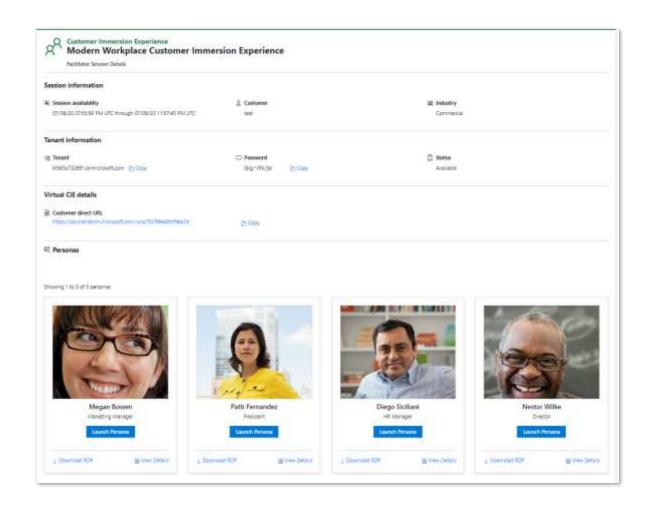
- After Launching the CIE, you are taken to a screen that looks like the CIE experience that was selected when the CIE was first started.
- The downloadable guide is available, and the CIE options are visible.
- Click 'Launch Experience' to be brought to the CIE detail page.



## **Instant On CIEs**

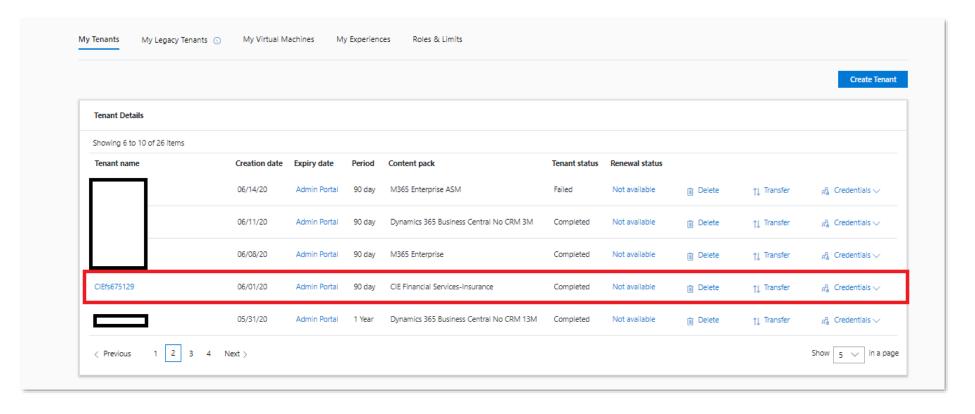
### From this page you can:

- Find the tenant admin credentials to log into your tenant.
- Copy the customer-facing URL so your customers can access the virtual machines from a browser window to join the CIE.
- Access the Personas in your CIE.
  - This can be done by any of the below ways:
    - Clicking 'Launch Persona'.
    - Downloading the RDP file.
    - Viewing the details to access the Persona's credentials in browser.



## **Quick Tenant CIE**

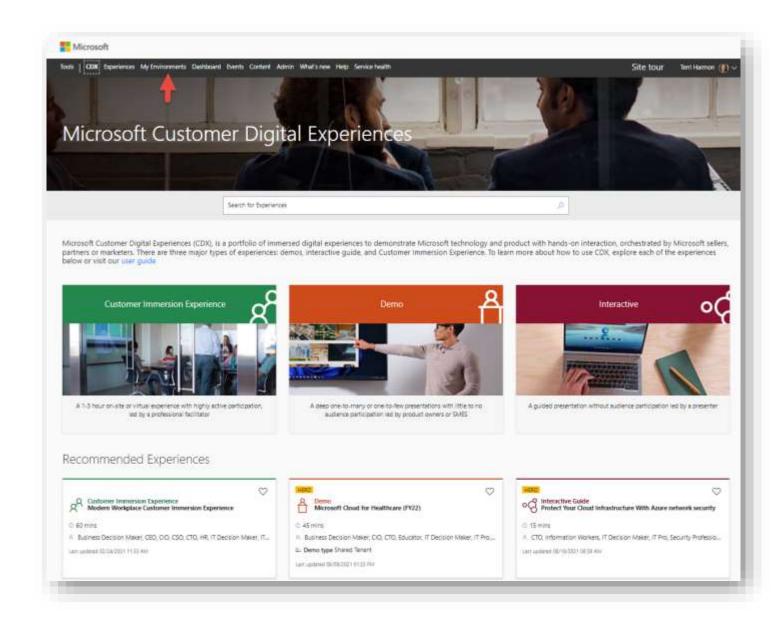
- If you opt to use the quick tenant option, a new tenant will be added to your list of active tenants in the 'My Tenant' list.
  - To access your quick tenant simply click on 'My Environments', and your CIE tenant will be available in your list of tenants.
  - A Quick Tenant CIE provides only a preconfigured tenant and can be accessed by your users either
    in a browser or on physical devices. (Devices are not provided by CDX).



# Obtaining and accessing Tenants

## Obtaining a demo tenant

Visit the My Environments page on CDX to obtain a new demo tenant or get details on an existing tenant.



## Create a new tenant

On the My Environments page, click Create Tenant

All available options will be show on the screen – no other options exist if you do not see it as a choice.

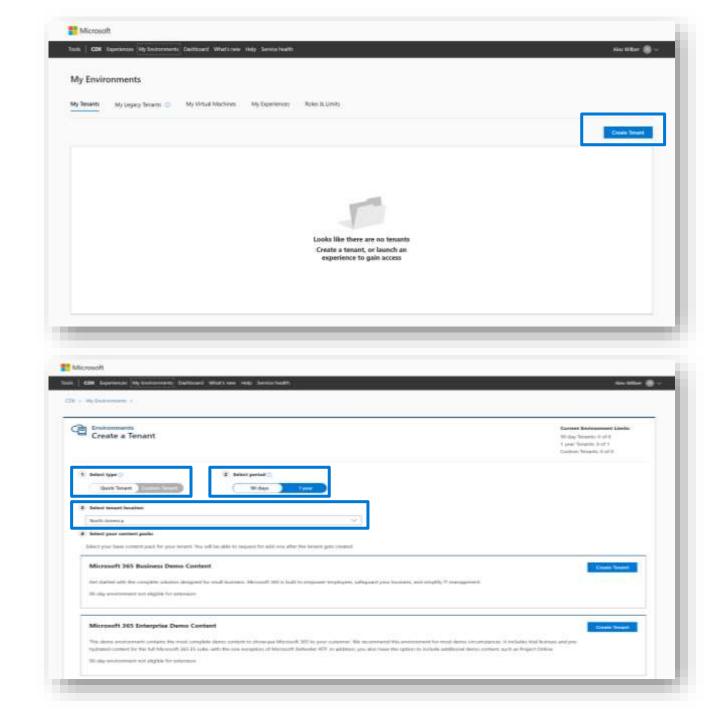
Select Quick tenant to get a tenant without waiting for it to be provisioned

Choose a period – most demo tenants should be 90 days

Select a tenant location

Click Create Tenant next to a tenant content pack description to claim that tenant.

Not all content packs are available in all regions or time periods.

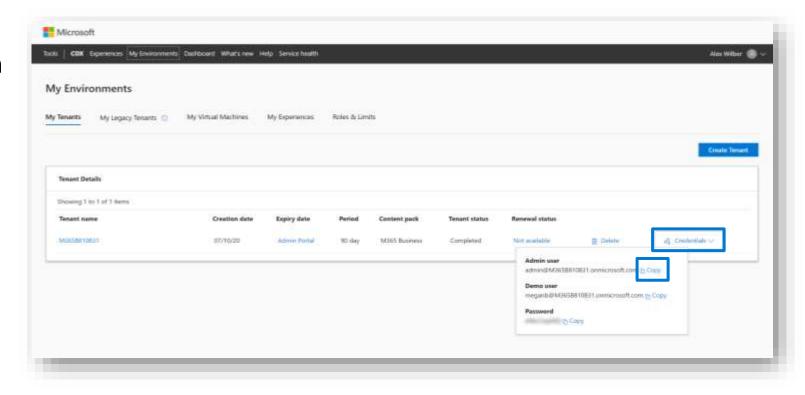


## Accessing your tenant details

You can find your tenant details on the My Environment page or click on the tenant name to open the tenant detail page.

Log into your tenant using the credentials provided in a browser by visiting <a href="www.office.com">www.office.com</a>

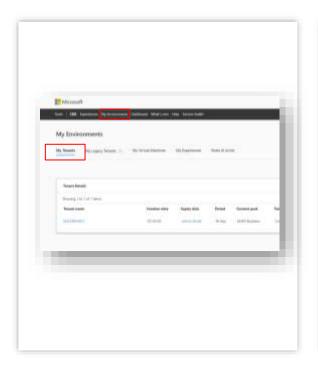
You may need to use in-private so that the browser doesn't try to authenticate with your work account automatically.

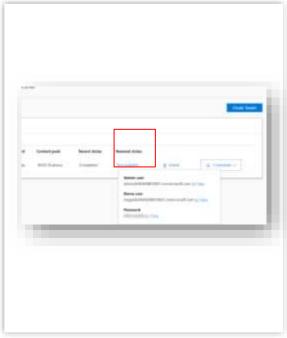


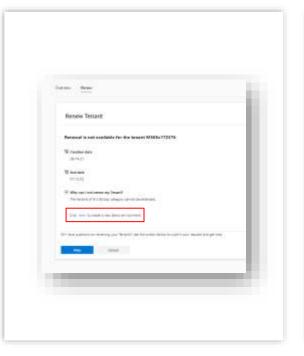
Important: To prevent loss of access to your tenant, you should not add MFA or change the password of the tenant's users. This may prevent the CDX support team from assisting you with future requests.

# **Tenant Extensions**

## How to submit a Tenant Extension









Go the My Environments tab in the main navigation

Once on the page select the My Tenants tab to view your claimed tenants For each tenant you can see the 'Renewal status' in the table.

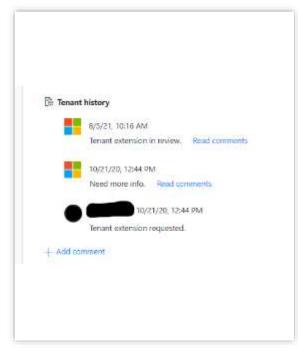
The renewal status is based on the 'Expiry Date' which you can view in the tenant Admin portal in Azure. 90-day tenants are not eligible for extension except for a few tenant types.

If you would like to ask for an exception you can open a support ticket via the link in the renew page.

An overview of the extension process and FAQ can also be found by clicking on the 'Renewal Status' of your tenant.

## How to Respond to the Extension Team

Not available Requested ① Not available Need more info (i) Not available
In Review ①

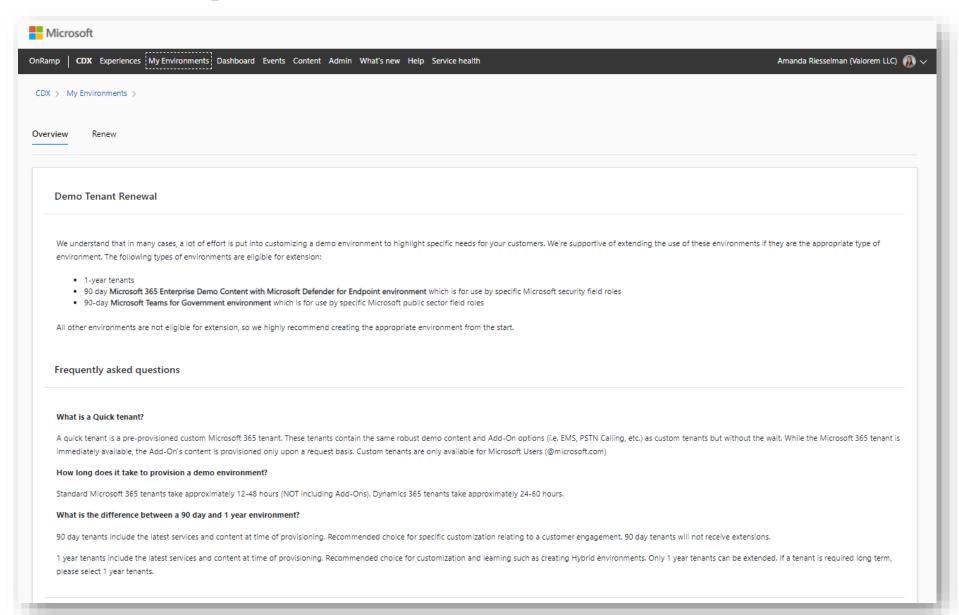


After submitting an extension request, the 'Renewal status' will change from 'renew' to 'Requested' and will show as 'In Review'

Once the request is submitted, the request will either be approved, denied, or additional information is needed by the extension team.

If Additional information was required in order to process the request, you can submit new information to the extension team. Once you have sent a follow up, the status will change to 'In Review' If any additional information is required by the extension team, you can provide new details via the 'Add Comment' button on the tenant detail screen.

## Overview and FAQ



# FAQ & Support

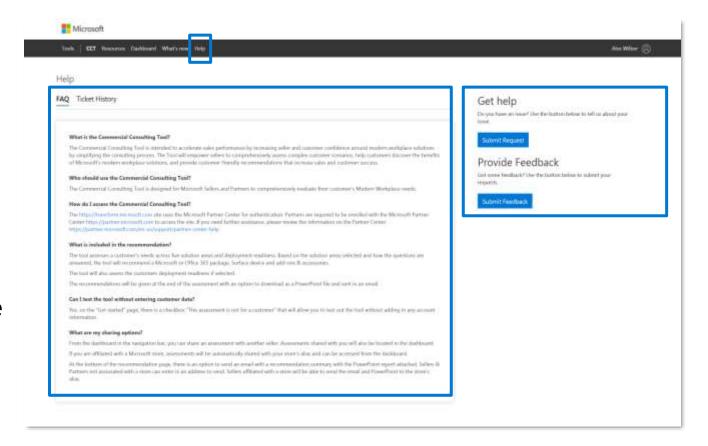
## Support

CDX has 24/5 support via

<u>support@transform.microsoft.com</u> with an 8-hour SLA. This alias should be used for all support items including Simulated Demos, Demos, CIEs, and any other issues that may arise while using CDX.

The CDX support team can assist with questions surrounding material on CDX but cannot provide technical support for issues arising from tenant use outside of published demo scripts.

The CDX support team cannot provide custom licensing for tenants obtained on CDX.



Users can also open a ticket via the Help page within CDX and then monitor the status of the ticket via the Ticket History.

Additionally, users are also offered an opportunity to provide feedback about the tool or the user experience.