

Trial Setup Guide

Set up Microsoft 365, Power Platform, Dataverse, RapidStart CRM, Azure, Microsoft Foundry OpenAI chat access, and the RapidClaw Addon for testing.

Required Order

1. Microsoft 365 tenant 2. Dataverse environment 3. RapidStart CRM 4. Azure trial and Microsoft Foundry OpenAI chat access 5. RapidClaw Addon 6. RapidClaw Settings deployment

Audience

Test users and implementation admins

Set calendar reminders before day 30. OpenAI chat model usage in Microsoft Foundry is billed by Microsoft through Azure and is the customer/tester's responsibility, even during trial testing.

This guide walks a test user through creating the Microsoft trial resources needed to test RapidClaw:

- Microsoft 365 trial tenant
- Power Platform access
- Dataverse trial environment
- RapidStart CRM 30-day Marketplace trial
- Azure trial subscription
- OpenAI chat model access in Microsoft Foundry
- RapidClaw Addon Marketplace installation
- RapidClaw Settings deployment, including Azure VM creation

Before You Begin

You will need:

- A phone number for Microsoft identity verification
- A payment method for trial verification
- An email address that can be used to create or administer a Microsoft tenant
- Permission to create Microsoft 365, Power Platform, and Azure trial resources

Important: Trial terms, availability, and included credits can change. Review Microsoft's current terms during signup.

Cost-Control Reminder

To avoid unexpected charges, mark your calendar to cancel or remove all trial resources before the 30-day trial windows expire.

Recommended reminders:

- Create a calendar reminder for 25 days after signup.
- Create a second reminder for 28 days after signup.
- Before day 30, cancel paid subscriptions, uninstall trial apps if required, and delete Azure resources that are no longer needed.
- In Azure, stop is not always enough. Delete unused VMs created by RapidClaw, disks, public IPs, OpenAI model deployments, and resource groups if the test is complete.
- Review Microsoft Cost Management in the Azure portal during the test and before cleanup.

Important: Azure resources can accrue cost independently. Deleting the VM but leaving disks, public IPs, Foundry/OpenAI resources, or model deployments behind can still create charges.

Important: The customer/tester is responsible for any OpenAI chat model usage charges billed by Microsoft through the Azure subscription, even while Microsoft 365, Power Platform, RapidStart CRM, RapidClaw, or Azure trial offers are active.

1. Create A Microsoft 365 Trial Tenant

1. Go to the [Microsoft 365 business plans page](#).
2. Choose a Microsoft 365 business plan that offers a trial, such as **Microsoft 365 Business Standard**.

3. Select **Try for free**.
4. Follow the signup prompts.
5. Create a new Microsoft tenant domain, for example:
`rapidclawtest.onmicrosoft.com`
6. Create the tenant admin user account.
7. Complete phone verification and any required trial setup steps.
8. Sign in to the [Microsoft 365 admin center](#).
9. Confirm the tenant admin account can access the admin center.

Recommended test accounts:

Purpose	Example
Tenant administrator	<code>admin@rapidclawtest.onmicrosoft.com</code>
Test maker/admin	<code>maker1@rapidclawtest.onmicrosoft.com</code>
Test user	<code>user1@rapidclawtest.onmicrosoft.com</code>

2. Confirm Power Platform Access

1. Sign in using the new tenant admin account.
2. Go to the [Power Platform admin center](#).
3. If prompted, start or activate the available Power Platform or Power Apps trial.
4. Confirm you can access the Power Platform admin center.

3. Create A Dataverse Trial Environment

RapidClaw testing requires Dataverse. Create a dedicated Dataverse environment instead of using the default environment.

1. In the [Power Platform admin center](#), go to **Manage > Environments**.
2. Select **New**.
3. Enter an environment name, for example:
`RapidClaw Test`
4. Set **Type** to **Trial**.
5. Choose the correct **Region**.
6. Set **Create a database for this environment** to **Yes**.
7. Select **Next**.
8. Choose the language and currency.
9. Do not enable Dynamics 365 apps unless the test specifically requires them.
10. Select **Save**.
11. Wait for the environment and Dataverse database to finish provisioning.

Important: Before importing, publishing, or installing anything, confirm that **RapidClaw Test** is the selected Power Platform environment.

4. Install RapidStart CRM From Microsoft Marketplace

RapidClaw testing requires RapidStart CRM. RapidStart CRM is installed from Microsoft Marketplace and includes its own 30-day trial.

1. Go to the [RapidStart CRM Microsoft Marketplace listing](#).
2. Confirm the listing is **The Original RapidStart CRM** by **Forceworks**.
3. Select **Buy now**, **Get it now**, or the available trial option.
4. Sign in with the new Microsoft tenant admin account.
5. When prompted, choose the Dataverse environment created for RapidClaw testing:
`RapidClaw Test`
6. Start the RapidStart CRM 30-day trial.
7. Complete the Marketplace installation flow.
8. After installation, return to Power Apps and confirm RapidStart CRM appears in the selected environment.

Important: RapidStart CRM should be installed into the dedicated Dataverse test environment. Do not install it into the default environment unless that is intentionally the test target.

5. Create An Azure Trial Subscription

RapidClaw requires an Azure subscription before the RapidClaw Addon is installed. RapidClaw Settings will use this Azure subscription later to create the required Azure resources, including the RapidClaw VM.

1. Go to the [Azure free account page](#).
2. Select **Start free**.
3. Sign in with the same Microsoft account or tenant admin used for the Microsoft 365 trial, if possible.
4. Complete identity verification.
5. Add the required payment method.
6. Confirm the Azure free account or trial subscription is active.
7. Go to the [Azure portal](#).
8. Confirm you are in the correct Microsoft tenant/directory.

Important: Before creating Azure resources, confirm the correct tenant and Azure subscription are selected.

6. Confirm OpenAI Chat Model Access In Microsoft Foundry

RapidClaw deployment assumes access to an OpenAI chat model deployed through Microsoft Foundry.

There is not a simple standalone "AI model trial" that should be assumed for RapidClaw testing. OpenAI chat model usage in Microsoft Foundry is normally billed through the Azure subscription. For chat models, billing is typically token-based for input and output usage. The customer/tester is responsible for model usage charges billed by Microsoft, even during trial testing.

Before testing RapidClaw AI features:

1. Go to [Microsoft Foundry](#) or the Azure portal.
2. Confirm the Azure subscription is the correct RapidClaw test subscription.
3. Confirm the subscription has access to the required OpenAI chat model family and deployment region.
4. Confirm the subscription has available quota for the required OpenAI chat model.
5. Deploy or select the OpenAI chat model required by the RapidClaw setup.
6. Record the Foundry resource name, model deployment name, region, and endpoint details needed during RapidClaw setup.
7. Review the model pricing before deployment or use.
8. Create an Azure budget and cost alerts for the test subscription or resource group.
9. If model deployment is blocked because the subscription is a free or trial subscription, upgrade to a supported paid Azure subscription or use a different approved subscription.

Important: Do not assume Azure free credits include usable OpenAI chat model quota in Microsoft Foundry. Some model deployment paths require a subscription with a valid payment method, and Microsoft documentation notes that free or trial Azure subscriptions do not work for some Foundry pay-as-you-go managed compute deployments. Any accepted model usage charges are the customer's/tester's responsibility.

7. Install The RapidClaw Addon

Install the RapidClaw Addon from Microsoft Marketplace only after the Azure trial subscription and OpenAI chat model access have been confirmed.

1. Confirm you are signed in as the installer/admin account.
2. Confirm the selected Power Platform environment is:
RapidClaw Test
3. Confirm the Azure subscription is active.
4. Confirm OpenAI chat model access in Microsoft Foundry is available.
5. Go to the [RapidClaw Microsoft Marketplace listing](#).
6. Confirm the listing is the RapidClaw Addon by Forceworks/RapidStart.
7. Select **Buy now**, **Get it now**, or the available trial/install option.
8. Sign in with the new Microsoft tenant admin account.
9. When prompted, choose the same Dataverse environment used for RapidStart CRM:
RapidClaw Test
10. Complete the Marketplace installation flow.
11. Resolve any dependency warnings before continuing.
12. Wait for the installation to complete.
13. Return to Power Apps and confirm the RapidClaw Addon components are available in the selected environment.

Important: RapidClaw depends on RapidStart CRM, the Azure subscription, and OpenAI chat model access in Microsoft Foundry. If RapidStart CRM is missing or installed in a different environment, the RapidClaw Addon import can fail.

8. Deploy RapidClaw From RapidClaw Settings

The RapidClaw VM is created by RapidClaw Settings during deployment. Do not manually create the VM unless the RapidClaw implementation instructions specifically require it.

Before starting deployment in RapidClaw Settings, confirm:

- The correct Dataverse environment is selected.
- RapidStart CRM is installed.
- The RapidClaw Addon is installed.
- The Azure trial subscription is active.
- OpenAI chat model access in Microsoft Foundry is confirmed.
- Azure budget and cost alerts are configured.

In RapidClaw Settings:

1. Open the RapidClaw Settings app or settings page.
2. Confirm the target Dataverse environment.
3. Select the correct Azure tenant and subscription.
4. Confirm or enter the Azure resource group naming details, for example:

```
rg-rapidclaw-test
```

5. Confirm or enter the VM naming details, for example:

```
vm-rapidclaw-test
```

6. Enter the Microsoft Foundry/OpenAI chat model deployment details required by RapidClaw.
7. Review estimated Azure and model usage costs.
8. Start the RapidClaw deployment.
9. Wait for RapidClaw Settings to create the required Azure resources, including the VM.
10. Confirm the RapidClaw deployment completes successfully.

Important: Before deploying from RapidClaw Settings, confirm the correct Azure tenant, subscription, resource group, model deployment, and VM naming details.

9. Final Verification Checklist

Confirm each item before beginning RapidClaw testing:

- Calendar reminders are set for day 25 and day 28 to cancel or clean up trial resources before day 30.
- The Microsoft 365 trial tenant is active.
- The tenant admin can access the Microsoft 365 admin center.
- The tenant admin can access the Power Platform admin center.
- The dedicated Power Platform environment exists.
- The environment has a Dataverse database.
- RapidStart CRM is installed in the dedicated Dataverse environment.
- The RapidStart CRM 30-day trial is active.

- Test users have the required Microsoft 365 and Power Platform access.
- The Azure trial subscription is active.
- OpenAI chat model access in Microsoft Foundry, quota, pricing, deployment details, and budget alerts are confirmed.
- The RapidClaw Addon is installed in the same Dataverse environment as RapidStart CRM.
- RapidClaw Settings has created the RapidClaw Azure VM in the correct subscription and resource group.
- Remote access to the VM works, if required.

Key Links

- [Microsoft 365 business plans](#)
- [Microsoft 365 admin center](#)
- [Power Platform admin center](#)
- [Microsoft Power Platform trial environments](#)
- [RapidStart CRM Microsoft Marketplace listing](#)
- [RapidClaw Microsoft Marketplace listing](#)
- [RapidStart app purchase and installation guide](#)
- [Azure free account for virtual machines](#)
- [Azure portal](#)
- [Microsoft Foundry](#)
- [Microsoft Foundry cost management](#)
- [OpenAI / Foundry model quotas](#)