

Simplifying customer onboarding

The image shows a video player interface with a presentation slide. The slide has a dark blue background with the text "Simplifying customer onboarding in Business Central" in light blue. A stylized logo of three overlapping diamond shapes is on the right. Below the slide, the video content shows a man in a grey suit speaking, with a vertical list of social media icons on the right side of the video frame.

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Simplifying customer onboarding in Business Central

Agenda


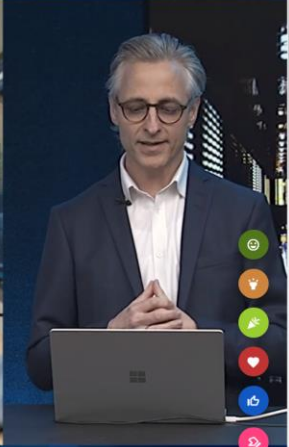
- Why simplify onboarding?
- The vision
- The onboarding "toolbox"
- Demo
- Delivering onboarding experiences
- How to get started

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Why simplify customer onboarding?

Customers
 Want a better startup experience and get to the **intended** value of Business Central faster.
 Want to learn from using the product.







Partners
 Want to scale and onboard more customers.
 Want to automate as much of the implementation as possible.

Navigation icons: Home, Sessions, Boardrooms, Sessions, Networking, Resources, My Profile, My Agenda, Satisfaction Survey, Notifications, Logout.

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The onboarding vision


Past		Future
 Consultant/implementation assistance>	 Users can finalize/do the setup themselves
 Partner billable hours from implementation>	 Partners deliver their knowledge as IP
 Classroom training>	 Users will learn from the product

Navigation icons: Home, Sessions, Boardrooms, Sessions, Networking, Resources, My Profile, My Agenda, Satisfaction Survey, Notifications, Logout.

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What's in the onboarding "toolbox"

Customer interview




Agree on the configuration with the customer

Management API




Automate deployment of customer environment, users, permissions and setup data

Configuration packages




Bring setup data

Assisted Setup Wizards




Guide the customer through setup in a Q+A fashion

Manual Setup

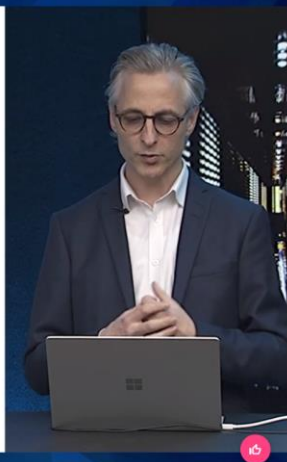


Manual setup of features and settings

Configuration Questionnaire




Migration and data import




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What's in the onboarding toolbox


Customer interview




Management API




Configuration packages




Assisted Setup Wizards




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Configuration Questionnaire




Getting Started Checklist

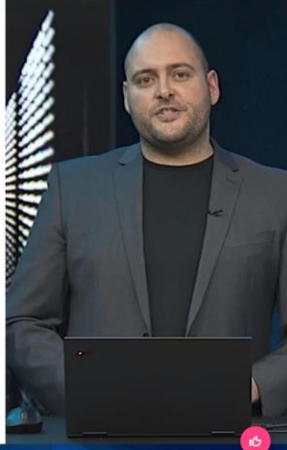


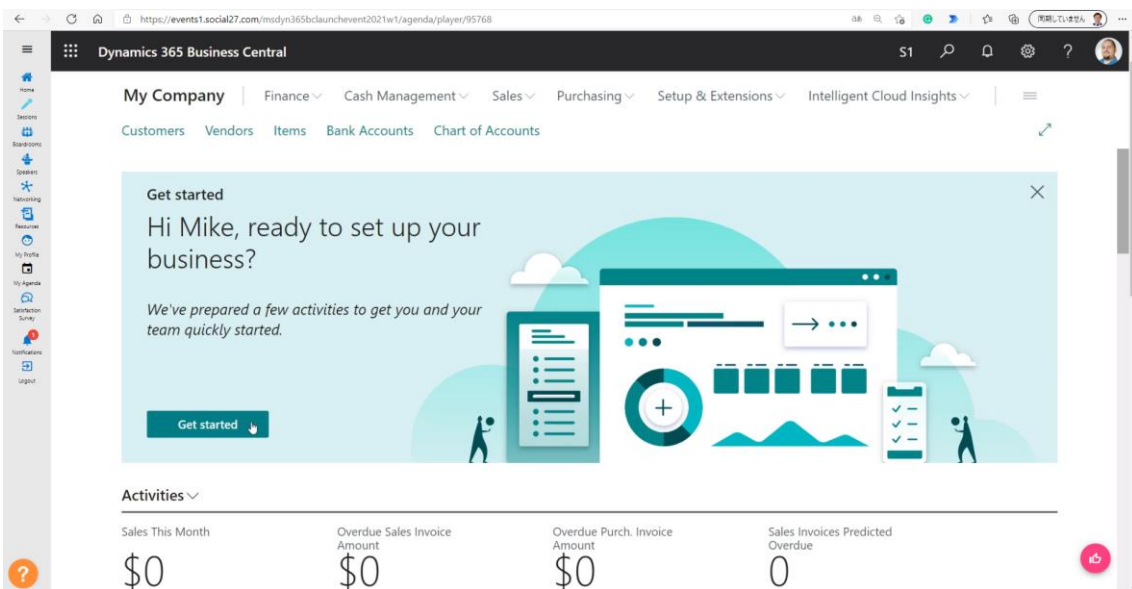
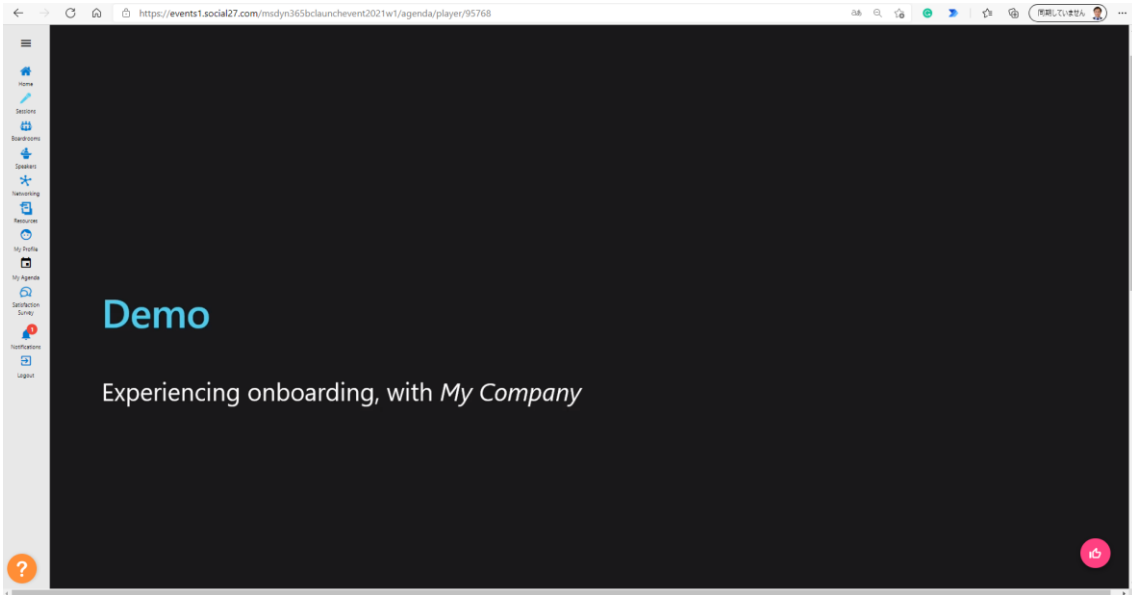
List of tasks to finalize company setup

Teaching Tips & Tours



In-context learning





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Dynamics 365 Business Central S1

My Company | Finance | Cash Management | Sales | Purchasing | Setup & Extensions | Intelligent Cloud Insights

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

Get started

Here are a few steps that make you ready for business

Skip checklist

Your checklist:

1. Company details
2. Update users
3. User permissions
4. User settings
5. Outgoing email
6. Migrate data

Fetch users from Microsoft 365

Get the latest information about users and licenses for Business Central from Microsoft 365.

5 minutes

Start Skip for now

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$0	\$0	\$0	0

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Dynamics 365 Business Central

My Company | Finance | Cash Management | Sales | Purchasing | Setup & Extensions | Intelligent Cloud Insights

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

View - Users

Search + New Manage Process Navigate Page More options

User Name ↑	Full Name	Status	Authentication Email
MIKE	Mike Borg Cardona	Enabled	mike@434446mbc180US.onmicrosoft.com

Process

Effective Permissions

Manage

View

Edit

About user accounts

Here, you manage who has access, and who can do what. Assign specific permissions to individual users, and organize users in user groups with group-level permissions.

Learn more Go back Take tour Close

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Authoring tours

page 12345 "Example page"

```

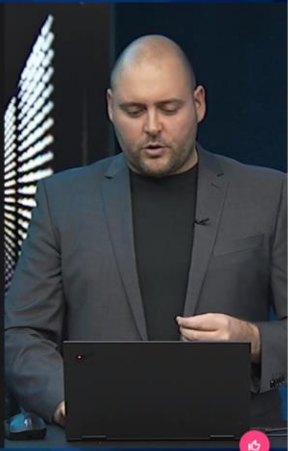
{
  Caption = 'Example page';
  PageType = List;
  HelpLink = 'https://fabrikam.com/5';
  AboutTitle = 'About my page (title)';
  AboutText = 'About my page (text)';
}

```

About my page (title) ✕

About my page (text)

Learn more Got it



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Authoring tours

repeater(Group)

```

{
  field("Field1"; "Field1")
  {
    ApplicationArea = Basic, Suite;
    ToolTip = 'On-demand tooltip';
    AboutTitle = 'About my field1 (title)';
    AboutText = 'About my field1 (text)';
  }
}

```

About my page (title) ✕


About my page (text)

Learn more Take tour

About my field1 (title) ✕

About my field1 (text)

1 of 1 End tour



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Authoring tours

area(processing)

```

{
  action("Action1")
  {
    ApplicationArea = Basic, Suite;
    Caption = 'My action';
    RunObject = page "My Users";
    Image = Users;
    ToolTip = 'On-demand tooltip';
    AboutTitle = 'About my action1 (title)';
    AboutText = 'About my action1 (text)';
  }
}

```

About my page (title) ✕

About my page (text)

Learn more Take tour

About my field1 (title) ✕

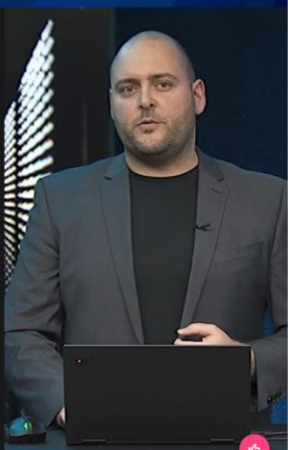
About my field1 (text)

1 of 4 Next

About my action1 (title) ✕

About my action1 (text)


3 of 4 Previous Next



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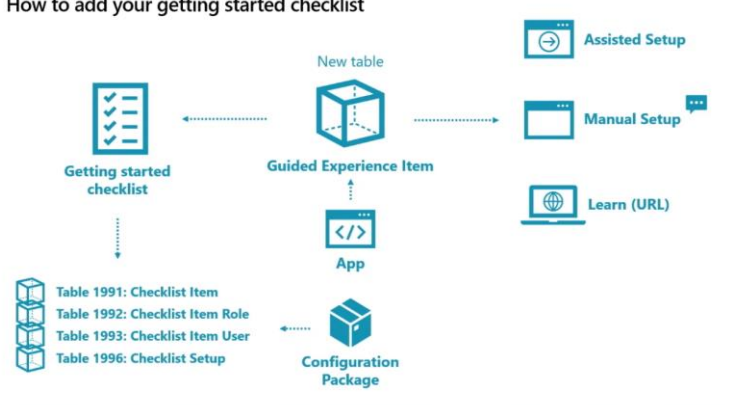
Authoring tours

- Implementation
 - Set properties AboutTitle, AboutText
 - On page objects, fields, actions, parts
 - On Page Objects, Page Extensions, Page Customizations (per-role)
 - Can replace, or hide by setting to empty string
- Design
 - Explain *what*, not *how*
 - Maximum of 5 teaching tips in a tour
 - Don't assume a sequence
 - Words matter



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How to add your getting started checklist

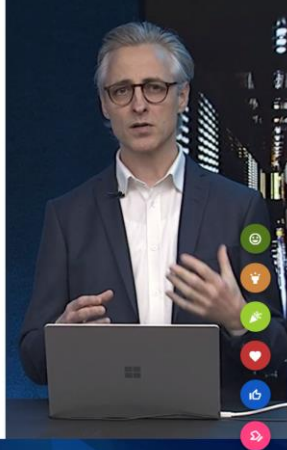


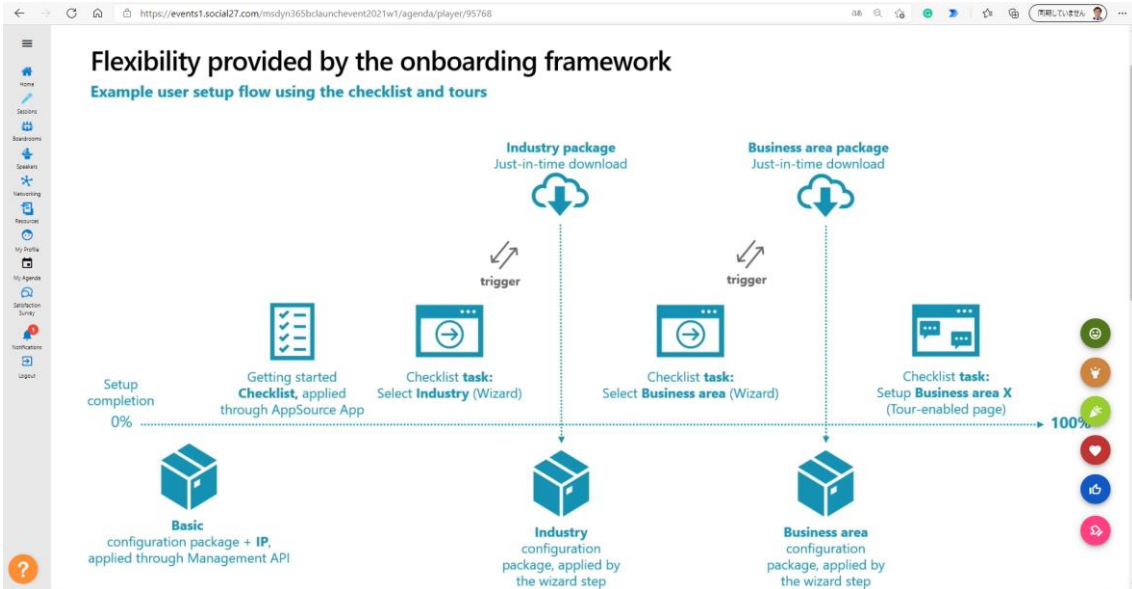
```

    graph TD
      Checklist[Getting started checklist]
      NewTable[New table]
      AssistedSetup[Assisted Setup]
      ManualSetup[Manual Setup]
      LearnURL[Learn (URL)]
      App[App]
      ConfigPackage[Configuration Package]
      GEXItem[Guided Experience Item]

      NewTable --> AssistedSetup
      NewTable --> ManualSetup
      NewTable --> LearnURL
      NewTable --> GEXItem
      GEXItem --> Checklist
      App --> GEXItem
      ConfigPackage --> App
  
```

Table 1991: Checklist Item
 Table 1992: Checklist Item Role
 Table 1993: Checklist Item User
 Table 1996: Checklist Setup





Other considerations

- Self-Learning (over training)
- Design for diversity (over one-off customization)
- Self-serve support (over call centers)

The video frame shows a man in a grey suit standing behind a laptop, presenting the 'Other considerations' slide. The slide lists three key considerations: Self-Learning (over training), Design for diversity (over one-off customization), and Self-serve support (over call centers).

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How to get started

- Go try it out in My Company
- Checklist Administration page

<https://aka.ms/BConboarding>

- Delivering onboarding experiences
- Tools at your disposal
- How to tie it all together
- Do's and don'ts

