

Onboarding customers to your apps



Agenda

Why

- Learn why onboarding is important and how to use the latest improvements for app developers and publishers, so you can build great onboarding scenarios for your customers

Basics

- Understanding the fundamentals in the platform, so you know what to add to your apps, including where to tap into code and which artefacts to use

Setup Experiences

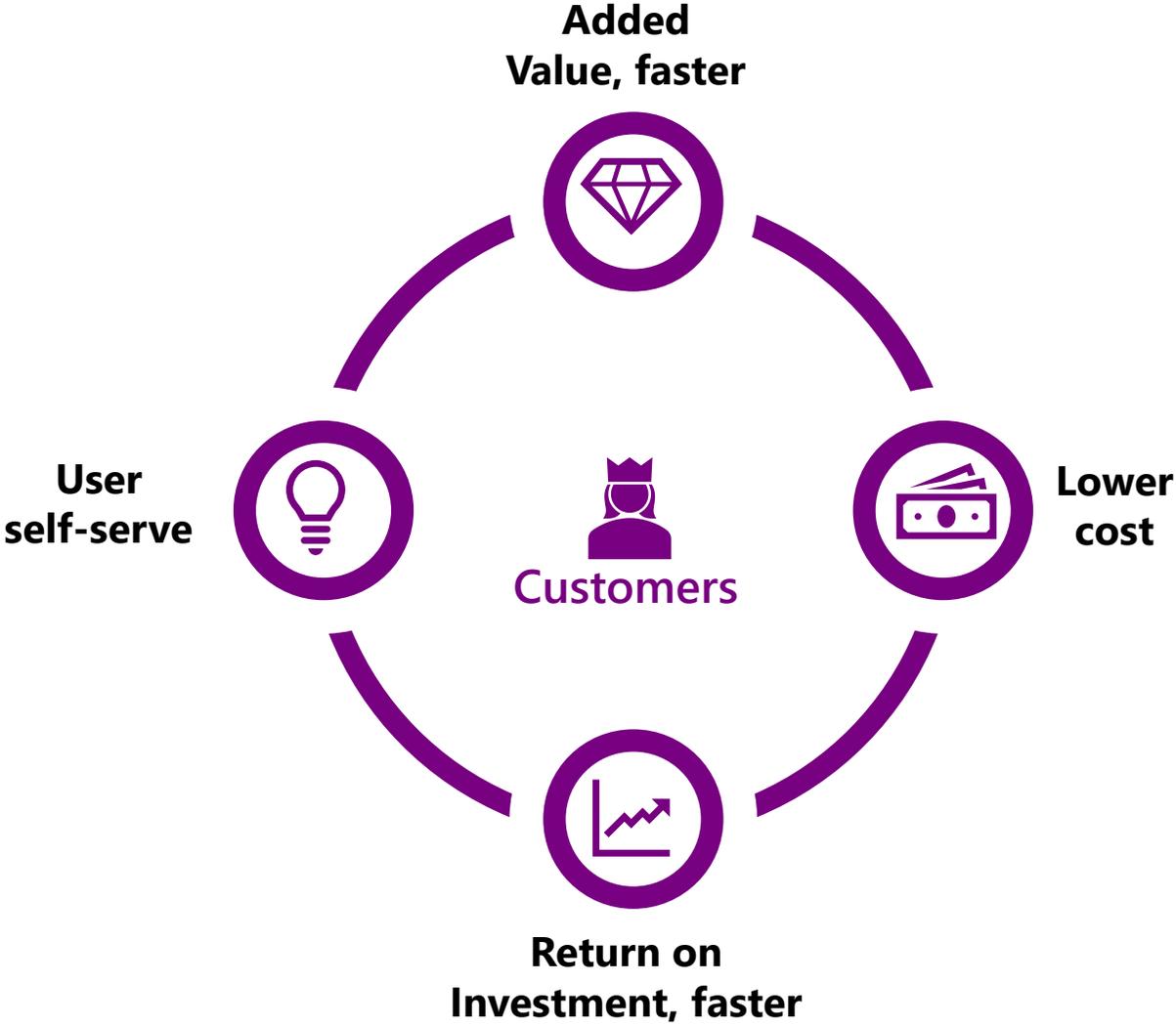
- Learn how to register setup objects and create checklist tasks, and how to think about setup experiences in a user-oriented way

Educational elements

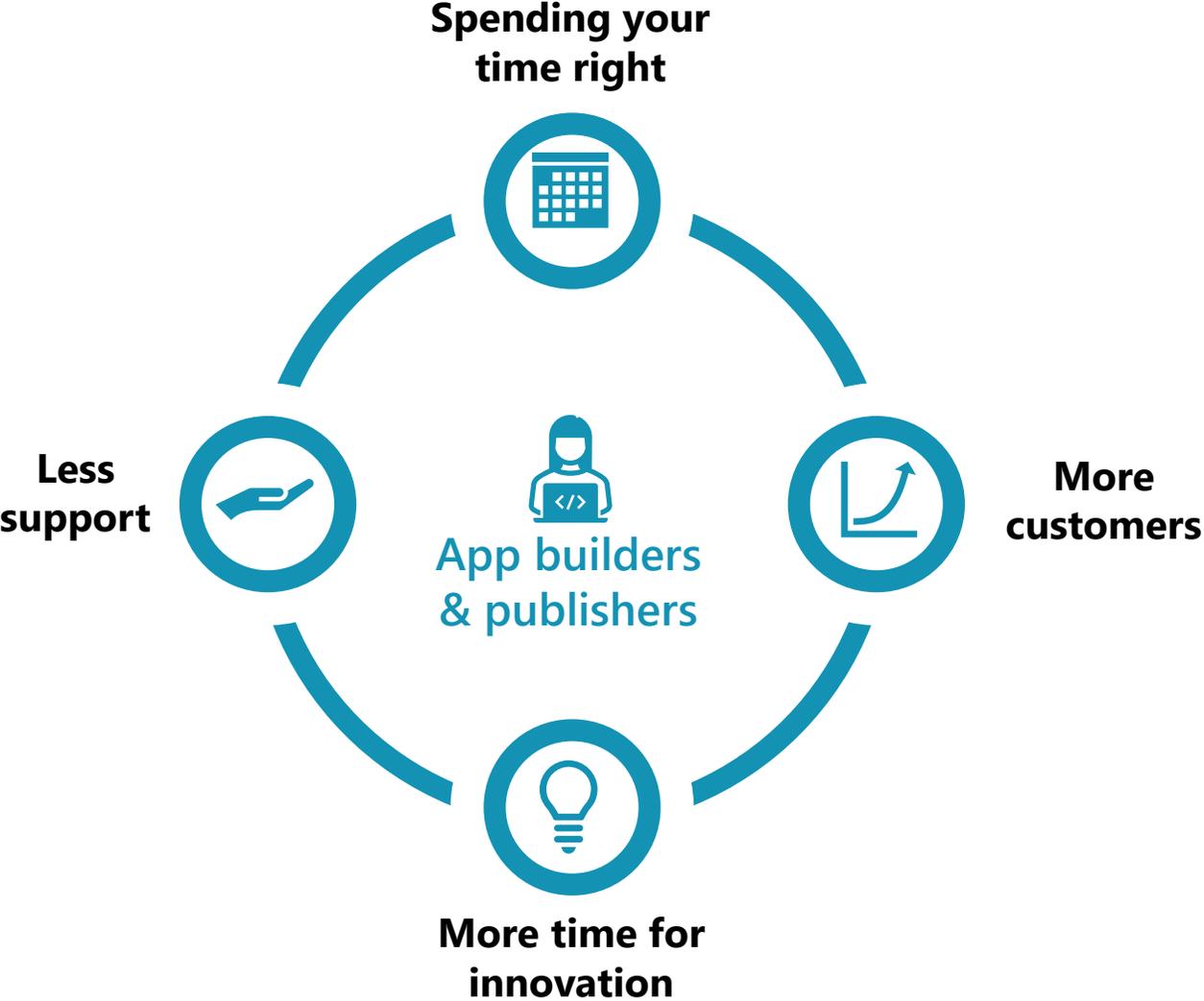
- Learn how to provide educational elements that relieve your support and empowers customers to use your app with no in-person training

After this session, you'll be able to use both new and existing capabilities to build great onboarding scenarios

Why onboarding is important



Why onboarding is important



Any app should ...



Have a great setup user experience

Users can install and set it up themselves, at their convenience



Register its setup objects

Setup automatically runs after installation is complete, or is easily found



Expose itself to the checklist system

Customers and VARs can add your app's setup objects to a checklist



Use educational artifacts

Customers and partners can learn how to use your app and get help

Basics

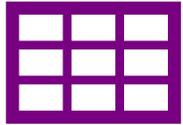
Guided Experience

Understanding the Guided Experience Item table

The cornerstone for setup and onboarding

Hosts items that offers a “guided experience” in some way

Table



**Guided Experience
Item**

- **Manual Setup** (“settings” and data pages)
- **Assisted Setup** (Wizards, step-by-step guides)
- **Application Feature** (other setup types or extending existing setup objects)
- **Tour** (start page with tour from the checklist)
- **Learn** (any URL opening in new tab)
- **Spotlight Tour** (Spotlight M365 integrations)
- **Video** (played from the checklist)

Setup objects
auto-run after
app is installed

Exposed to the
checklist

Populating the Guided Experience

Using the façade .Insert functions

```
local procedure InsertSetup
var
    GuidedExperience: Codeunit GuidedExperience;
    AssistedSetupGroup: Enum AssistedSetupGroup;
    VideoCategory: Enum "Video Category";
begin
    GuidedExperience.Insert(
        'Set up the Shoe Size',
        'Set up Shoe Sizes',
        'Here, we have made',
        'You will be done be',
        2,
        ObjectType::Page,
        Page::"Shoe Size Se",
        AssistedSetupGroup::GettingStarted,
        'https://<linktovideo>',
        VideoCategory::GettingStarted,
        'https://<linktohelp>',
        true);
end;
```

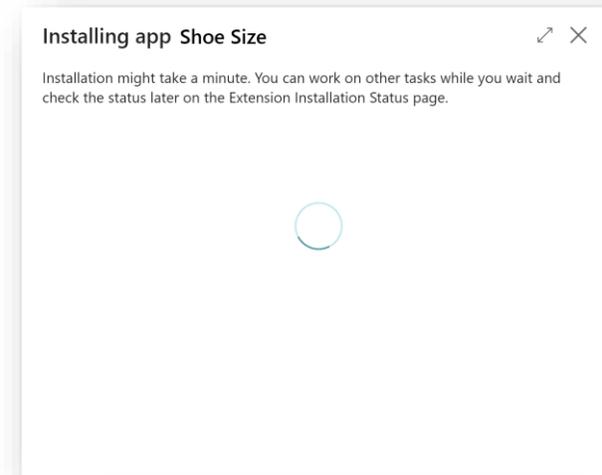
| Title | Completed | Learn more | Description |
|--|-------------------------------------|------------|--|
| Set up your company | <input type="checkbox"/> | - | |
| Set up exchange rates service | <input type="checkbox"/> | Read | View or update currencies and exchange r... |
| Enter company details | <input type="checkbox"/> | Read | Provide your company's name, address, lo... |
| Set up Value-Added Tax (VAT) | <input type="checkbox"/> | Read | Set up VAT to specify the rates to use to c... |
| Set up VAT Group Management | <input type="checkbox"/> | Read | VAT Group Management allows independ... |
| Fetch users from Microsoft 365 | <input type="checkbox"/> | - | Get the latest information about users and... |
| Get ready for the first invoice | <input type="checkbox"/> | - | |
| Set up outgoing email | <input type="checkbox"/> | Read | Set up the email accounts your business w... |
| Customize document layouts | <input type="checkbox"/> | Read | Make invoices and other documents look ... |
| Report on financial health | <input type="checkbox"/> | - | |
| Process Consolidations | <input type="checkbox"/> | - | Consolidate the general ledger entries of t... |
| Get ready for business | <input type="checkbox"/> | - | |
| Connect to a payment service | <input type="checkbox"/> | Read | Connect to a payment service so that your... |
| Migrate business data | <input type="checkbox"/> | Read | Import existing data to Business Central fr... |
| Set up AMC Banking 365 Fundamentals ext... | <input checked="" type="checkbox"/> | | |

Specify if this is the *primary* setup item for the app. When specified, this will be run automatically after a user installs the app. (AppSource apps only)

What's the effect of registering this Guided Experience Item?

 The **primary setup will run automatically** after a user installs the app

 Exposed itself to the checklist system, so any customer, consultant or app can use it in checklists



➔ **Primary setup**
or
List setup
options

- By using the **Checklist façade codeunit**
- By using the **Checklist Administration page**
- By inserting **data into the checklist tables** in other ways, like for example using a **Configuration Package**

What if...

... the *user installing* the app is *not the one who can set it up*?

... *setup is deferred* for some reason, *not done right after install*?



New “Set up” action available on Extensions Management

Run setup rule:

- ✓ Search for records with **Extension ID matching your app’s ID**
- ✓ **If only one entry is found, run it**
- ✓ **If multiple is found, run the primary**
 - ✓ **If no primary is found, show a list**



Guided Experience Item

| Name ↑ | Publisher | Version |
|--------------------|-----------|-----------------|
| Essential Bu | Microsoft | v. 21.0.46025.0 |
| Image Analy | Microsoft | v. 21.0.46025.0 |
| Import of Q | Microsoft | v. 21.0.46025.0 |
| Intelligent C | Microsoft | v. 21.0.46025.0 |
| Late Paymer | Microsoft | v. 21.0.46025.0 |
| Migration o | Microsoft | v. 21.0.46025.0 |
| Payment Lin | Microsoft | v. 21.0.46025.0 |
| Recommend | Microsoft | v. 21.0.46025.0 |
| Sales and In | Microsoft | v. 21.0.46025.0 |
| Send remitt | Microsoft | v. 21.0.46025.0 |
| Send To Em | Microsoft | v. 21.0.46025.0 |
| Shoe Size | Microsoft | v. 21.0.46025.0 |
| System Application | Microsoft | v. 21.0.46025.0 |

What if ...

I am extending the Inventory Setup page and want to add a Guided Experience Item with my own text. Guided Experience Item *already* has an entry for Inventory Setup, belonging to Base App

```
codeunit 50100 "Shoe Size Inventory Setup"
{
    TableNo = "Inventory Setup";
    trigger OnRun();
    begin
        page.Run(Page:"Inventory Setup", Rec);
    end;
}
```

Create a codeunit that runs the object that already exists in *Guided Experience Item*. In this example, *Inventory Setup*

```
local procedure InsertSetupItems()
var
    GuidedExperience: Codeunit "Guided Experience";
begin
    GuidedExperience.InsertApplicationFeature(
        'Shoe Sizes impact Inventory Setup',
        'Additional Inventory Setup',
        'Since you installed the Shoe Size app, you have to do additional setup in Inventory Setup. It will only take a minute.',
        1,
        ObjectType::Codeunit,
        Codeunit:"Shoe Size Inventory Setup",
        false);
end;
```

Add a *Guided Experience Item* of type *Application Feature*, that points to your codeunit. This runs *Inventory Setup*, but adds it to *Guided Experience Item* with custom title, duration and description

Basics

Checklist

Inserting a Guided Experience Item into the checklist

Using the façade .Insert functions

```
local procedure InsertChecklistItems ()
var
    TempProfile: Record "All Profile" temporary;
    Checklist: Codeunit Checklist;
    GuidedExperienceType: Enum "Guided Experience Type";
begin
    AddRoleToList (TempProfile, "Business Manager");

    Checklist.Insert (
        GuidedExperienceType::"Assisted Setup",
        ObjectType::Page,
        Page::"Shoe Size Setup Wizard",
        3000,
        TempProfile,
        false);
end;

local procedure AddRoleToList (...)
```

Codeunit ChecklistFacade

Reference the Checklist facade

Specify the role for which we are creating checklist tasks. Note, that this

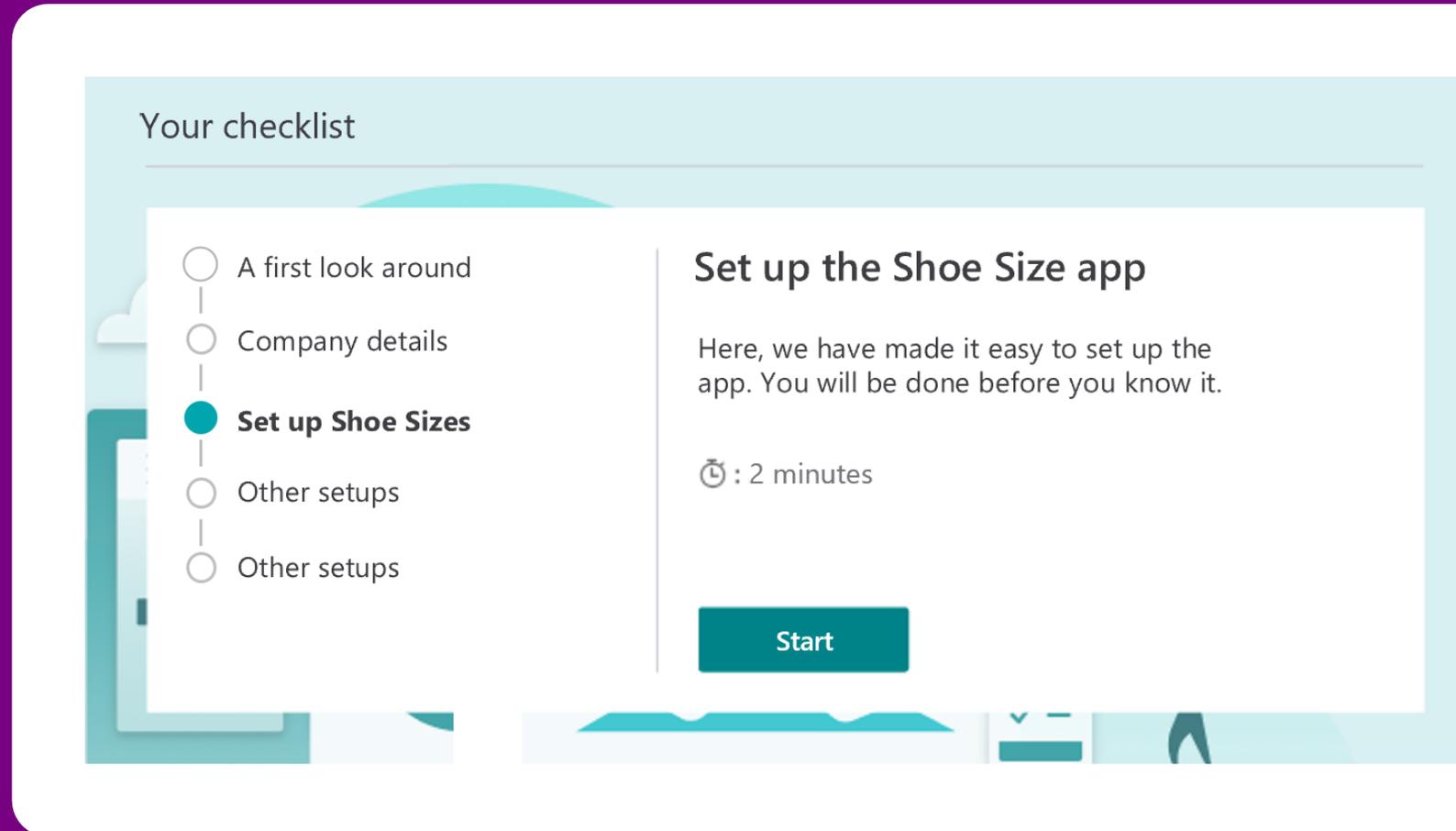
Specify the type of Guided Experience

Specify who should complete the checklist task. *True* = everyone must complete it for it to be recognized as completed, visually, in the checklist

Expose your setup objects to the checklist

App publishers may not necessarily add items to a checklist but **should empower consultants and users** to do so.

Remember to **register your Guided Experience Items!**



Providing a great
setup experience

Great setup experiences



Guided

Use **Assisted Setups** all you can, to **guide users** through the necessary steps



Just-Enough setup

Consider only guiding users through the **minimum setup necessary for their scenario (ask them)**, instead of all features.



Just-In-Time setup

Consider adding only data when needed, for example by **JIT downloading** it based on users' answers in an Assisted Setup. Only **add relevant data**



Consider splitting into sub-setups

If some tasks can or should be delegated to other users, **split up Assisted Setups** accordingly, so each user can **easily handle their part**

Provide educational
elements

Educate users

Use teaching tips

- Emphasize keywords for added clarity using **Bold** and *Italic*
- Hyperlink to related Business Central pages for a quick detour
- Simple markdown syntax in AL: apply to any teaching tip

The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS Danmark A/S'. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Use Dynamics', and 'Shopify'. The main area shows a list of Sales Orders with columns for 'No.', 'Sell-to Customer No.', 'Sell-to Customer Name', 'External Document No.', and 'Location Code'. The first row is highlighted in light blue.

| No. ↑ | Sell-to Customer No. | Sell-to Customer Name | External Document No. | Location Code |
|------------------------|-------------------------|----------------------------|-----------------------|---------------|
| 101001 | : 10000 | Kontorcentralen A/S | | |
| 101002 | 10000 | Kontorcentralen A/S | | |
| 101003 | 30000 | Lauritzen Kontormøbler A/S | | |
| 101004 | 40000 | Litware, Inc. | | |

On the right side, there is a 'Details' panel for the selected order, showing 'Customer Statistics' and 'Payments'.

Customer Statistics

| | |
|-------------------------|-----------|
| Customer No. | 10000 |
| Balance (LCY) | 62,940.00 |
| Balance (LCY) As Vendor | 0.00 |

Sales

| | |
|----------------------------|------------|
| Outstanding Orders (LCY) | 132,313.75 |
| Shipped Not Invd. (LCY) | 0.00 |
| Outstanding Invoices (LCY) | 125,685.00 |

Payments

| | |
|---------------------------|--------------|
| Payments (LCY) | 1,460,043.15 |
| Refunds (LCY) | 0.00 |
| Last Payment Receipt Date | 3/24/2022 |

An educational tip overlay is visible in the bottom left corner, titled 'My educational tip'. It contains the text: 'This tip overwrites the default teaching tip on Sales Orders. It can show text in bold and italic and link to other pages in Business Central.' Below the text are two buttons: 'Show Help' and 'Take a tour'.

The anatomy of a teaching tip

Adding or overwriting a teaching tip on a page or control

My educational tip

This tip overwrites the default teaching tip on Sales Orders. It can show text in **bold** and *italic* and link to other pages in Business Central.

Show Help

Take a tour

Set the title of the teaching tip. Beware of the length and check best practices at <https://aka.ms/BCOnboarding>

```
page extension SalesOrdersExtensi
{
    AboutTitle = 'My educational tip';
    AboutText = 'This tip overwrites the default teaching tip on
    Sales Orders. It can show text in bold and italic and
    link to [other pages] (?page=1383 "Opens the Item Templates") in
    Business Central.'
}
```

Simple Markdown formatting used, like **** **** for **bold** or *italics*

Teaching tips support navigation links to other Business Central pages. Specify the page with the **?page=** parameter and the [link text in square brackets]. Remember accessibility assistance with the text in double quotation marks

ent of the
length and

Contextual Help

The screenshot shows the Dynamics 365 Business Central interface. The main area displays a table of inventory items. The right-hand side features a 'Help' pane with a search bar and several sections of contextual help content.

| ID | Description | Type | Quantity on Hand | Substi... Exist | Assem... BOM | Base Unit of Measure | Cost is Adjusted |
|------|-------------------------------------|-----------|------------------|-----------------|--------------|----------------------|------------------|
| 06-S | ATHENS Mobile Pedestal | Inventory | 5 | No | No | PCS | ✓ |
| 08-S | LONDON Swivel Chair, blue | Inventory | 3 | No | No | PCS | ✓ |
| 20-S | ANTWERP Conference Table | Inventory | 10 | No | No | PCS | ✓ |
| 25-W | Conference Bundle 1-6 | Inventory | 0 | No | Yes | PCS | ✓ |
| 28-S | AMSTERDAM Lamp | Inventory | 8 | No | No | PCS | ✓ |
| 29-W | Conference Bundle 1-8 | Inventory | 0 | No | Yes | KG | ✓ |
| 36-S | BERLIN Guest Chair, yellow | Inventory | 100 | No | No | PCS | ✓ |
| 53-W | Guest Section 1 | Inventory | -49 | No | Yes | PCS | ✓ |
| 50-S | ROME Guest Chair, green | Inventory | 2 | No | No | PCS | ✓ |
| 54-S | TOKYO Guest Chair, blue | Inventory | 4 | No | No | PCS | ✓ |
| 55-W | Conference Bundle 2-8 | Inventory | -81 | No | Yes | PCS | ✓ |
| 58-S | MEXICO Swivel Chair, black | Inventory | 10 | Yes | No | PCS | ✓ |
| 59-W | Conference Package 1 | Inventory | -7 | No | Yes | PCS | ✓ |
| 72-S | MUNICH Swivel Chair, yellow | Inventory | 0 | No | No | PCS | ✓ |
| 80-S | MOSCOW Swivel Chair, red, cushioned | Inventory | 0 | Yes | No | PCS | ✓ |
| 88-S | SEOUL Guest Chair, red | Inventory | 0 | Yes | No | PCS | ✓ |
| 96-S | ATLANTA Whiteboard, base | Inventory | 10 | No | No | PCS | ✓ |

Help Pane Content:

- About items**
Items represent the products and services you buy and sell. For each item, you can manage the default sales and purchase prices used when creating documents, as well as track inventory numbers. With [Item Templates](#) you can quickly create new items having common details defined by the template.
[Take a tour](#)
[Go to Microsoft Docs](#)
- Related resources from Microsoft Docs**
 - [Create Item Cards for Goods or Services \(contains video\)](#)
 - [Setup Best Practices - Costing Method](#)
 - [Show more...](#)
- About apps on this page**
 - [Sales and Inventory Forecast - Micros...](#)
- Other resources**
 - [Help & Support](#)
 - [Keyboard Shortcuts](#)

- Help links from apps are surfaced in the contextual Help pane
- Ensure *contextSensitive* links are set to point to the most relevant help content you have
- **App level**
contextSensitiveHelpURL
Is used when the specific page does not point to something on its own
- **Page level**
contextSensitiveHelpPage
Is used when you want the page level docs to be more specific

Relieve your support – invest in better tooltips

- Valuable tooltips, that briefly explains what a field is for and how it is used, helps educate users
- When properly educated, your support is relieved
- Invest in better tooltips across all fields in your app
- Tooltip content is best written by people with business knowledge, often consultants or product owners

Dynamics 365 Business Central

CRONUS Danmark A/S

Sales

Posted Documents

Administration Sales/Purchase

Customers: All

Search

+ New

Delete

Process

New Document

Customer

| No. ↑ | Name | Responsibility Center | Location Code | Phone No. | Contact |
|-----------------------|------|-----------------------|---------------|-----------|-----------------|
| 10000 | | | | | Robert Townes |
| 20000 | | | | | Helen Ray |
| 30000 | | | | | Meagan Bond |
| 40000 | | | | | Ian Deberry |
| 50000 | | | | | Mathias Nilsson |

Name

Specifies the customer's name that appears on all related documents. For companies, specify the company's name here, and then add the relevant people as contacts that you link to this customer.

[Learn more](#)

Actions for you

1

Register your setup objects in *Guided Experience Item*, so setup will run automatically, or be easy to find later

2

Make onboarding as smooth with Assisted Setups, Video, teaching tips, contextual help pane links, and better tooltips

3

Consider Just-in-Time and Just-Enough setup approaches. JIT load data based on user choice, and consider deferring some setup until needed.

Where to go for more information

<https://aka.ms/BCOnboarding>

“Onboarding your customers to Business Central”

<https://aka.ms/BCOnboardingCustomers>

Other resources

Learn more!



Have a question?
aka.ms/BCYammer



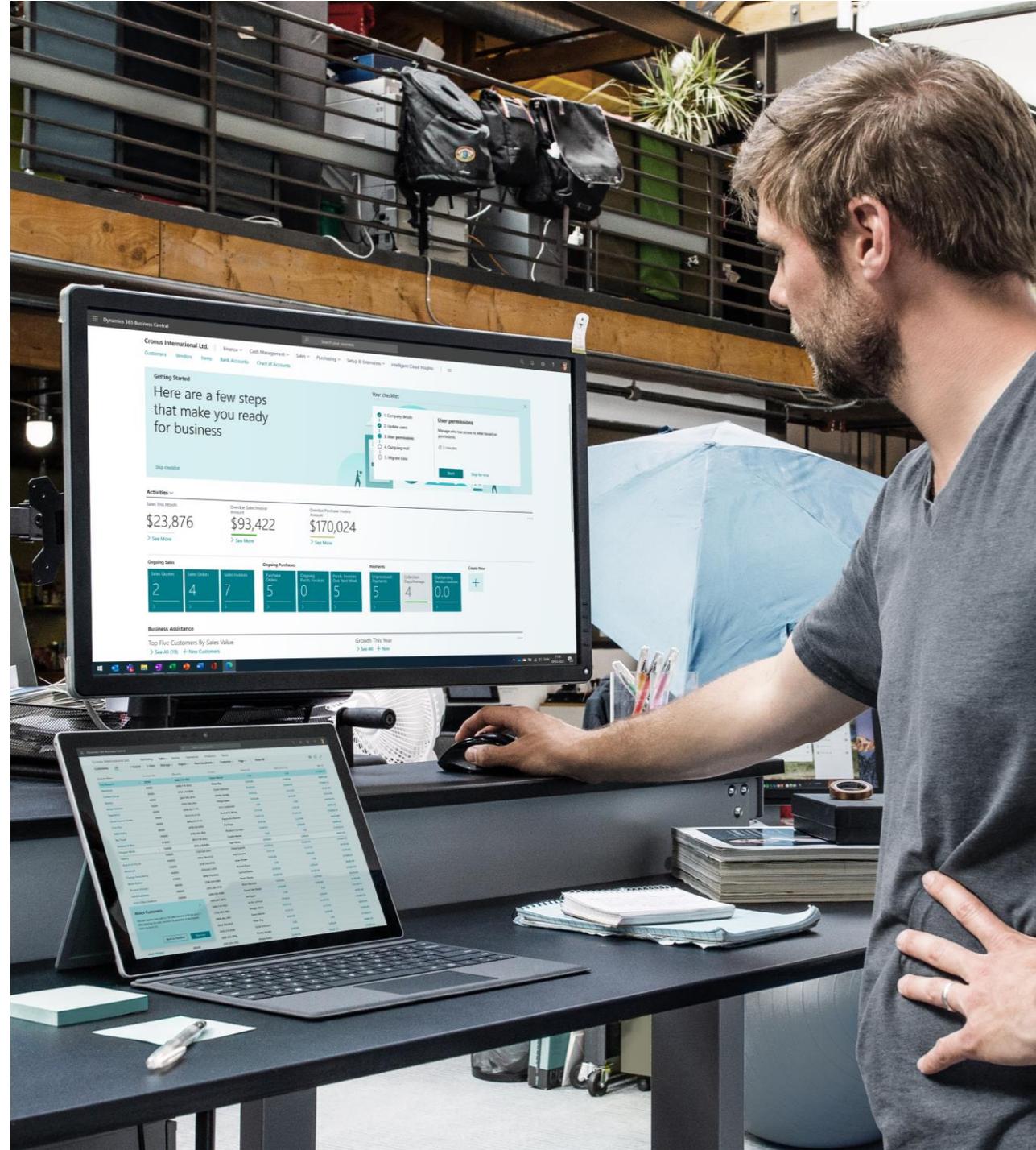
Join the conversation
<https://twitter.com/MSDYN365BC>



Watch the latest BCLE sessions
aka.ms/BCLE



Submit your ideas
aka.ms/BCIdeas



Thank you

