Microsoft Dynamics 365

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

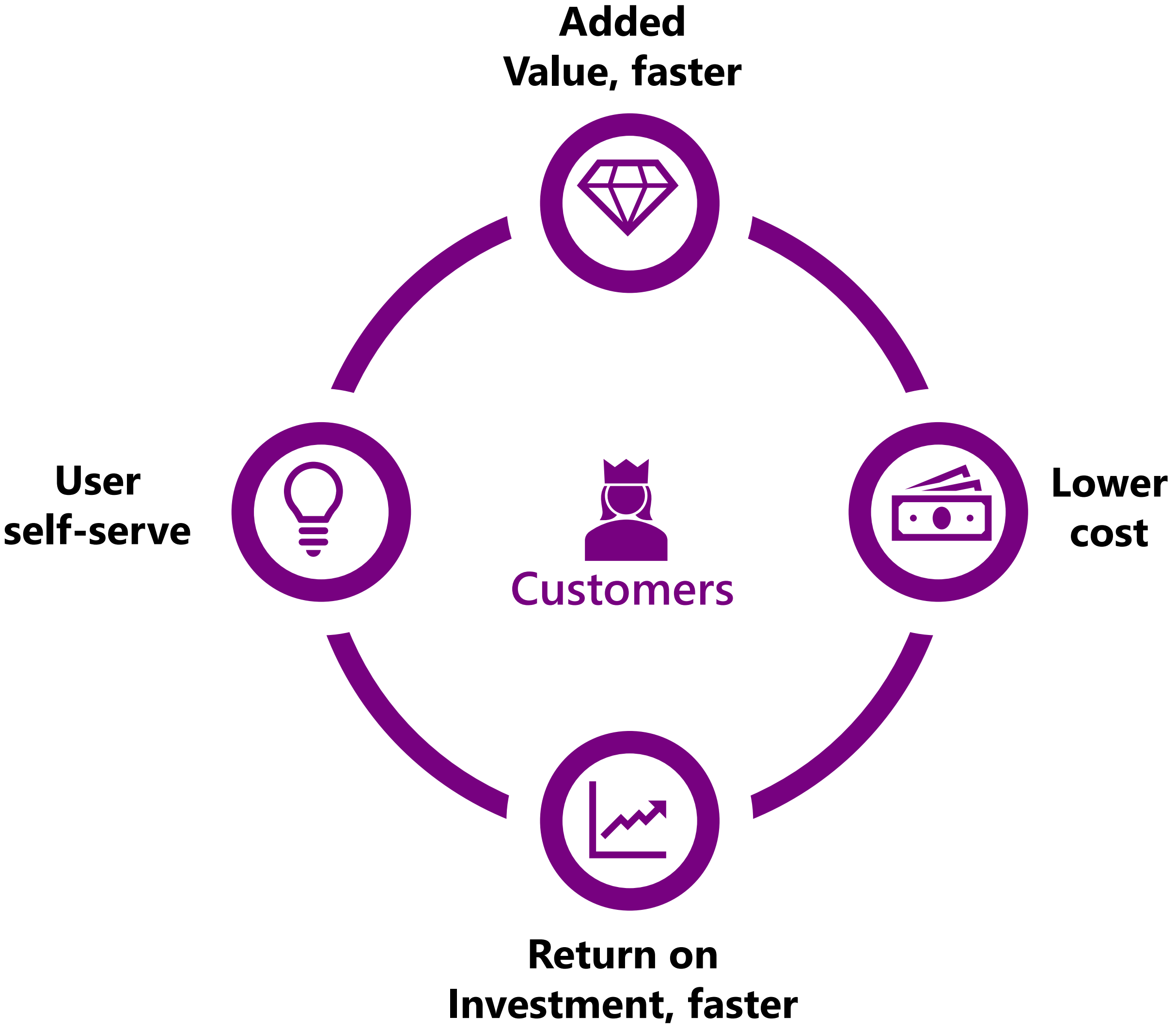
- Learn how to register setup objects and create checklist tasks, and how to think about setup experiences in a user-oriented way

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

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)

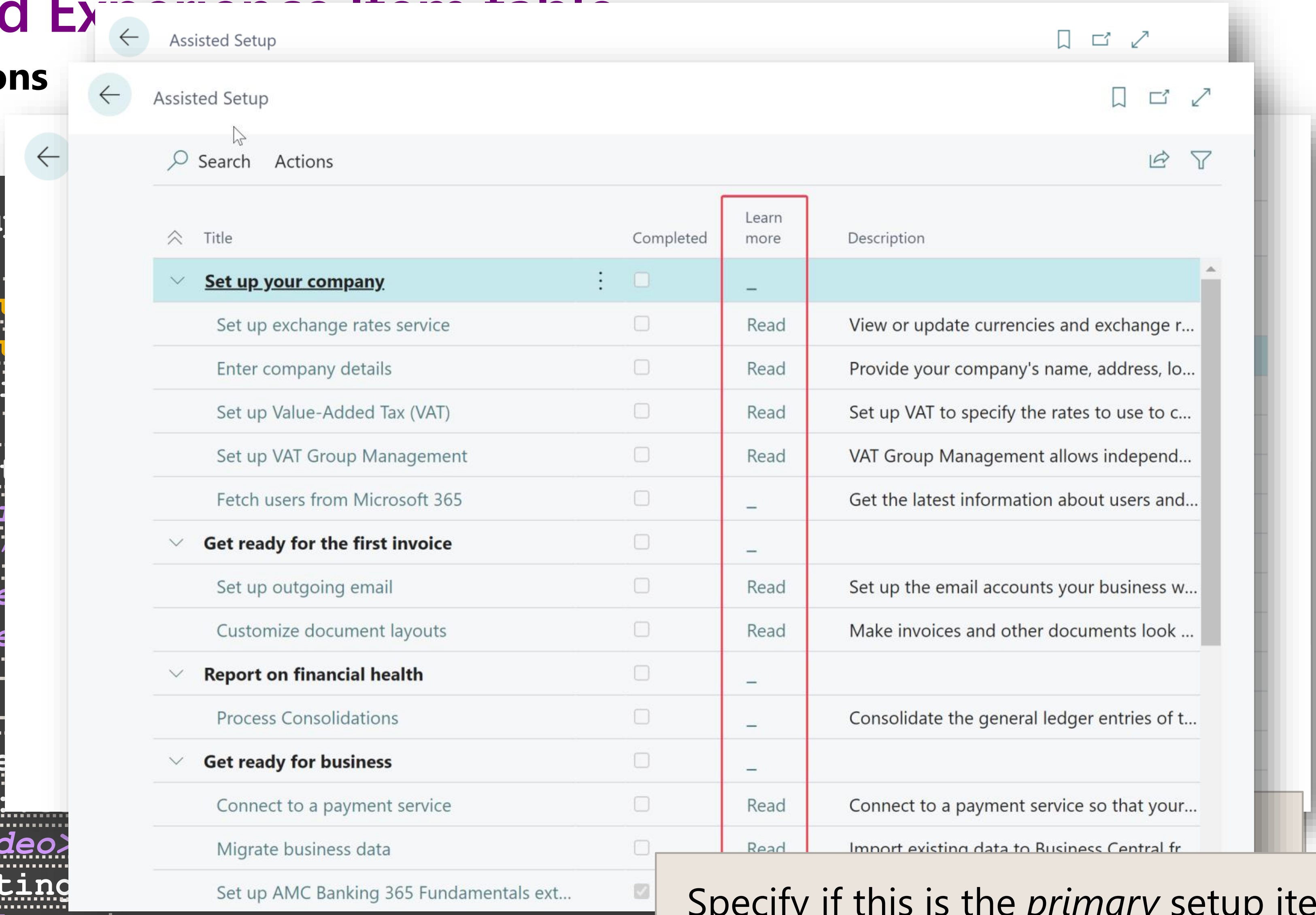
Setup objects **auto-run** after app is installed

Exposed to the checklist

Populating the Guided Experience Item table

Using the façade .Insert functions

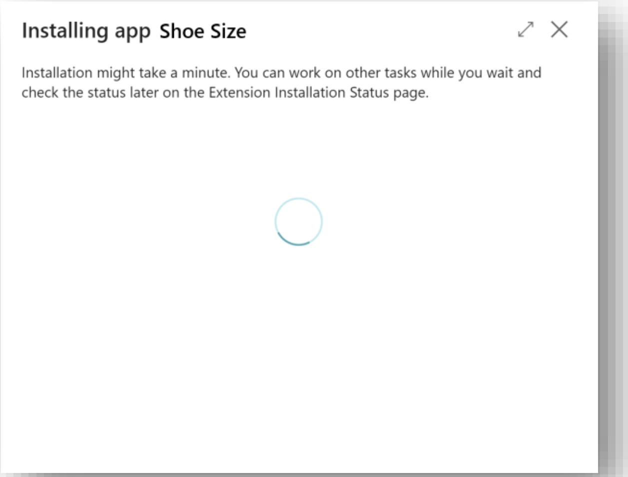
```
local procedure InsertSetu
var
    GuidedExperience: Code
    AssistedSetupGroup: Enu
    VideoCategory: Enum "Vi
begin
    GuidedExperience.Insert
        'Set up the Shoe Si
        'Set up Shoe Sizes'
        'Here, we have made
        You will be done be
        2,
        ObjectType::Page,
        Page::"Shoe Size Se
        AssistedSetupGroup:
        'https://<linktovideo>
        VideoCategory::Getting
        'https://<linktohelp>',
        true);
end;
```



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



Primary setup or **List setup options**

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

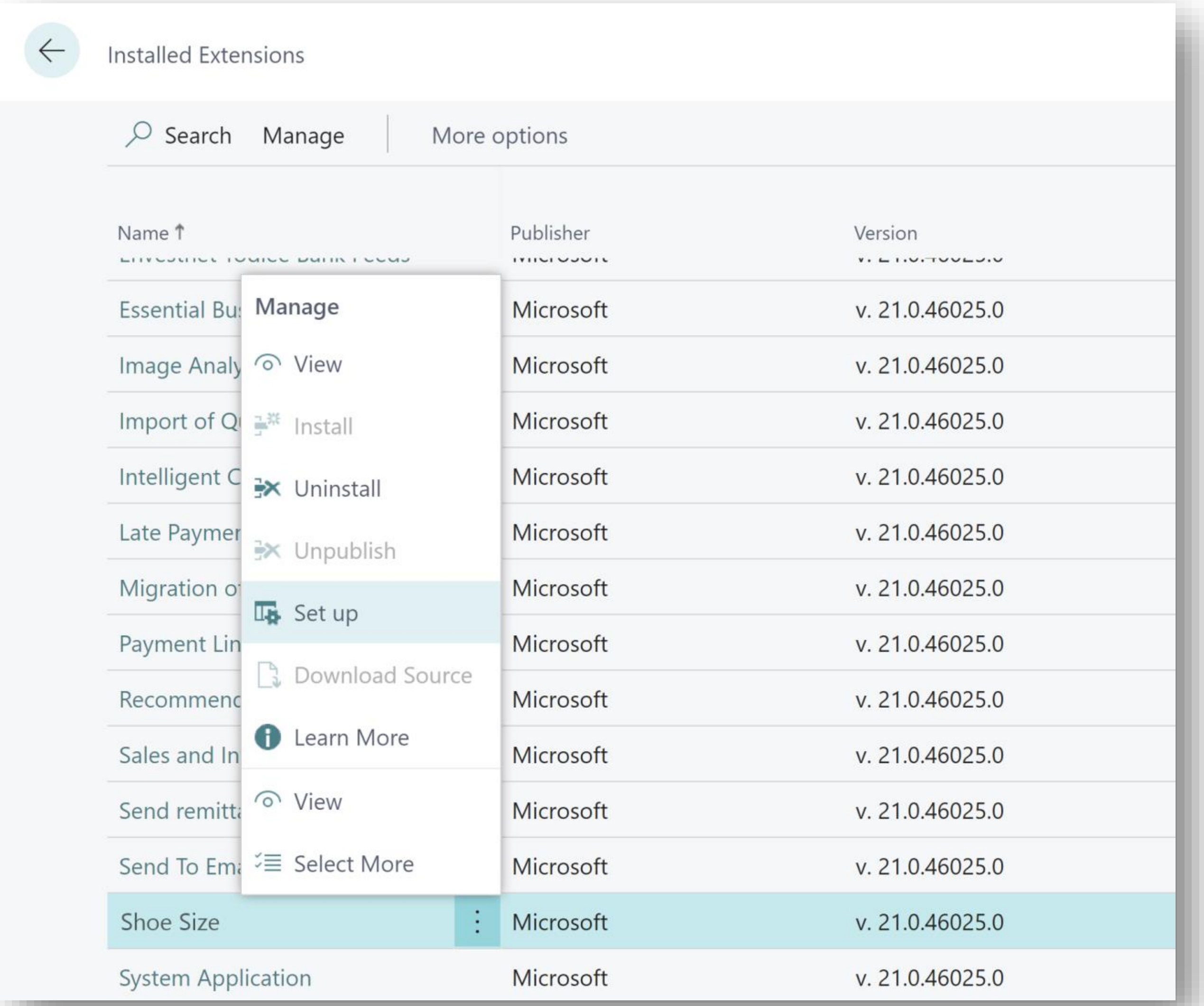
- **By using the Checklist façade codeunit**
- **By using the Checklist Administration page**
- **By inserting data into the checklist tables in other ways, like for example using a Configuration Package**

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

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

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(…)
```

Reference the Checklist facade

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

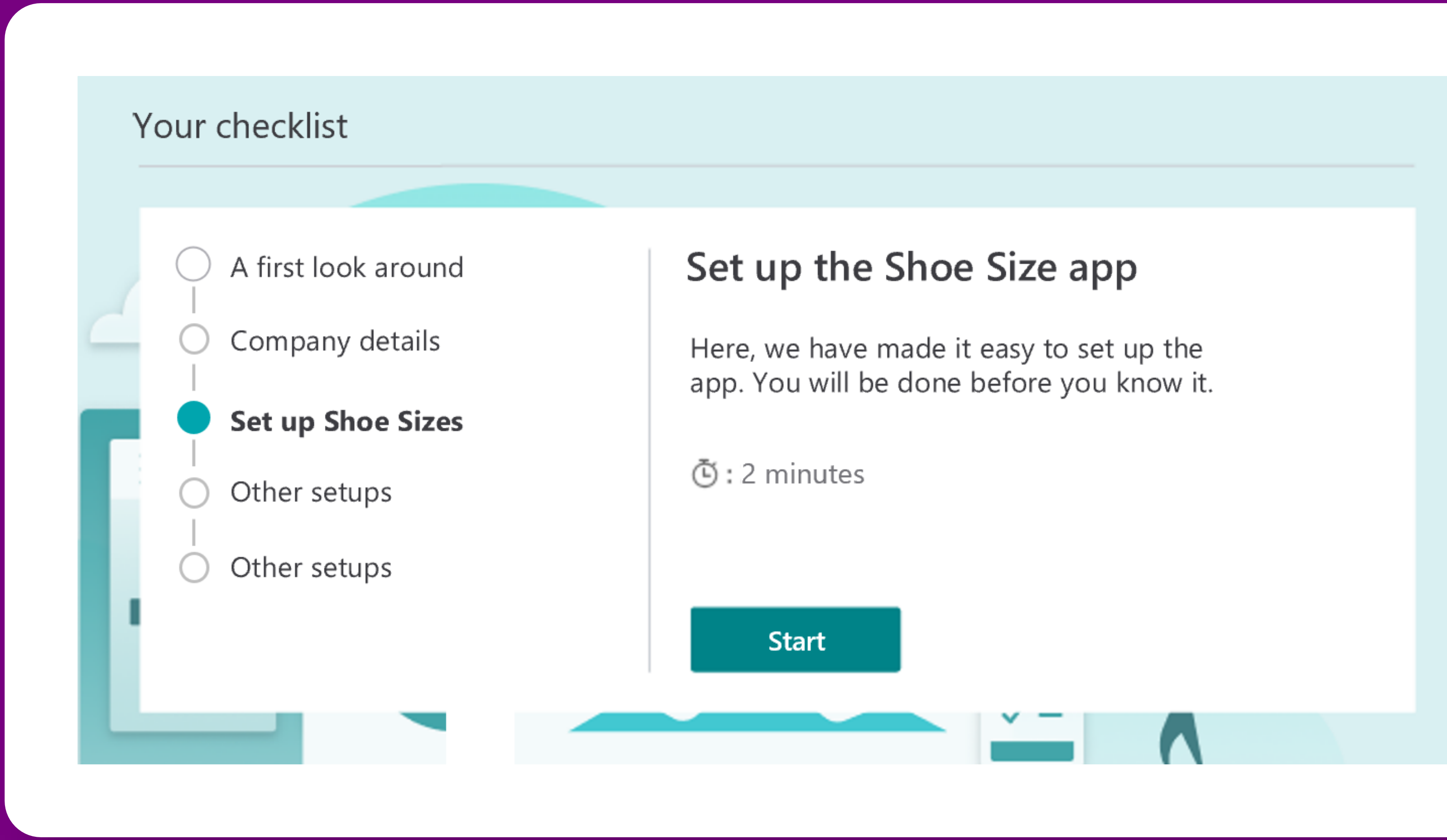
Specify the type of Guided Experience

Specify who should complete the checklist task. *True* = <u>everyone</u> 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

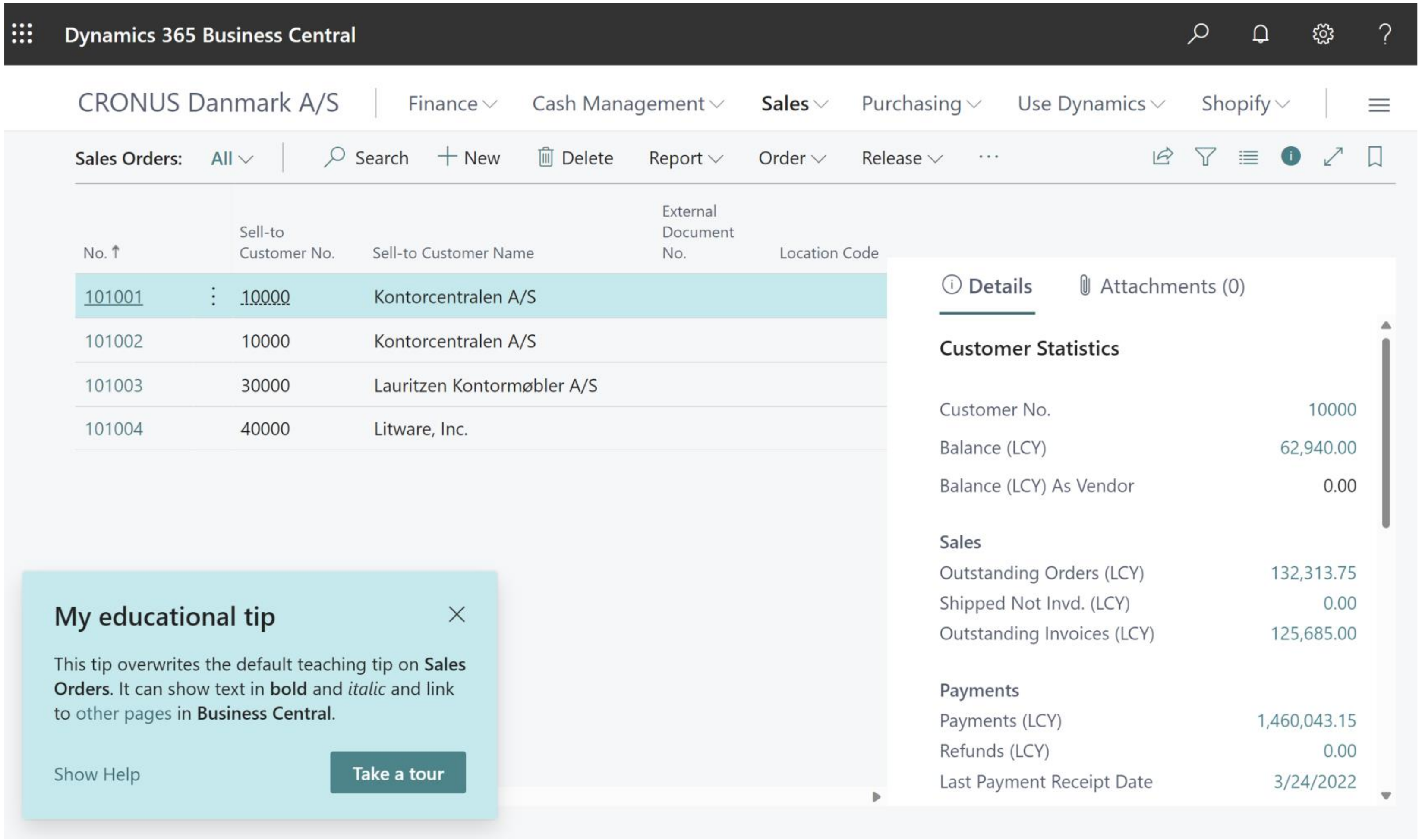
If some tasks can or should be delegated to other users, **split up Assisted Setups** accordingly, so each user can **easily handle their part**

Provide educational elements

Educate users

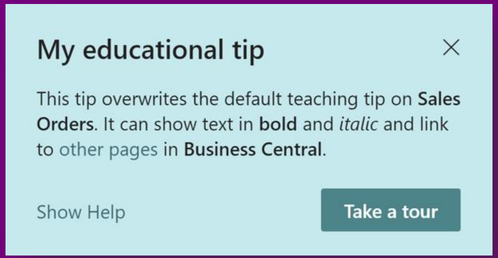
Use teaching tips

- 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 anatomy of a teaching tip

Adding or overwriting a teaching tip on a page or control



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

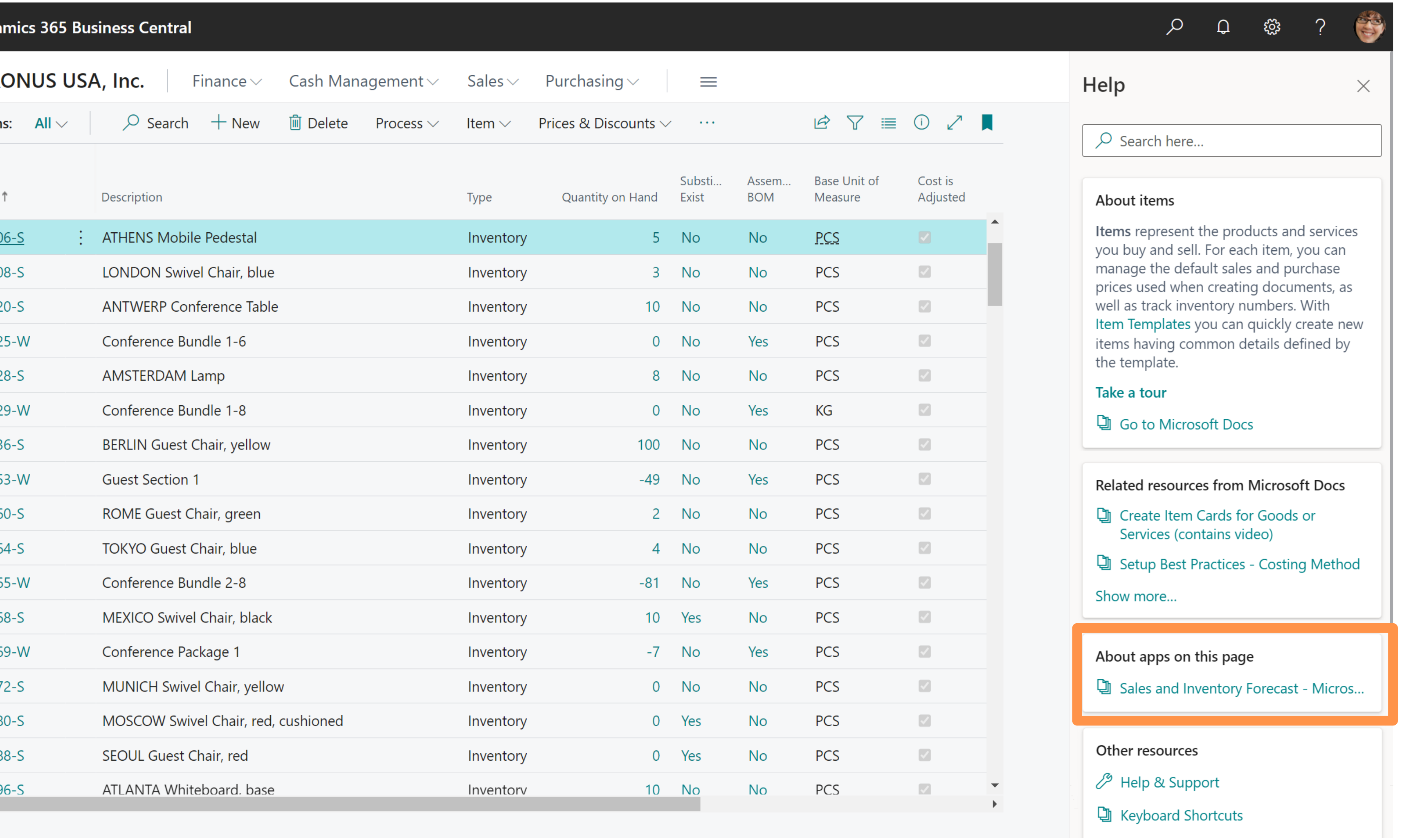
```
page extention SalesOrdersExtensi
{
    AboutTitle = 'My educational tip';
    AboutText = 'This tip overwrites the default teaching tip on
    **Sales Orders**. It can show text in **bold** and _italic_ and
    link to [other pages](?page=1383 "Opens the Item Templates") in
    **Business Central**.'


}
```

Simple MarkDown formattin
used, like ** ** for **bold** or _

…ent of the
…ngth and

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

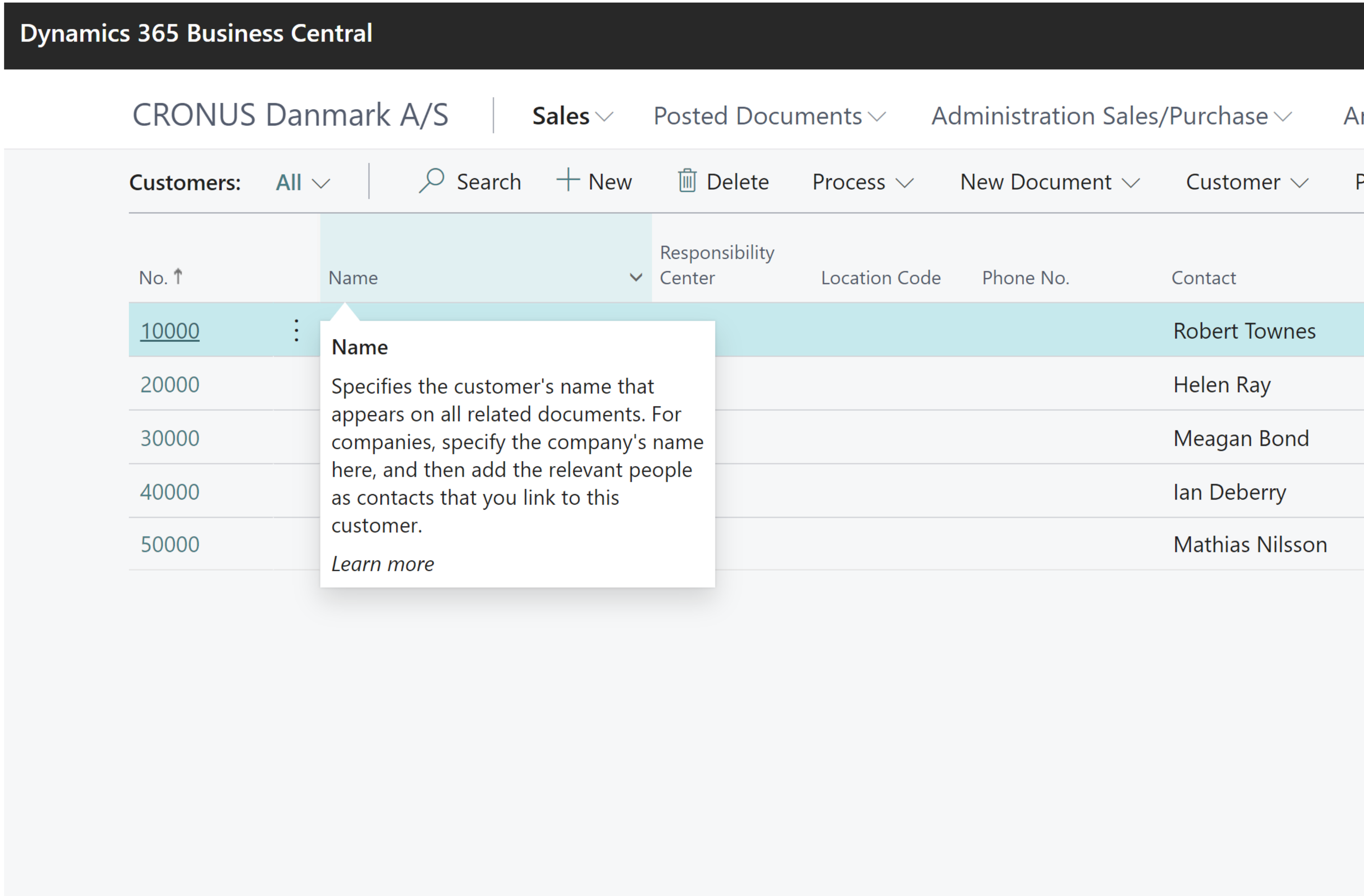
Contextual Help



- 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



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 defering 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

Microsoft Dynamics 365

Thank you