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DYNAMICS CON LIVE

MAY 2024

AppSource, Power Platform, Custom DEV in that order?

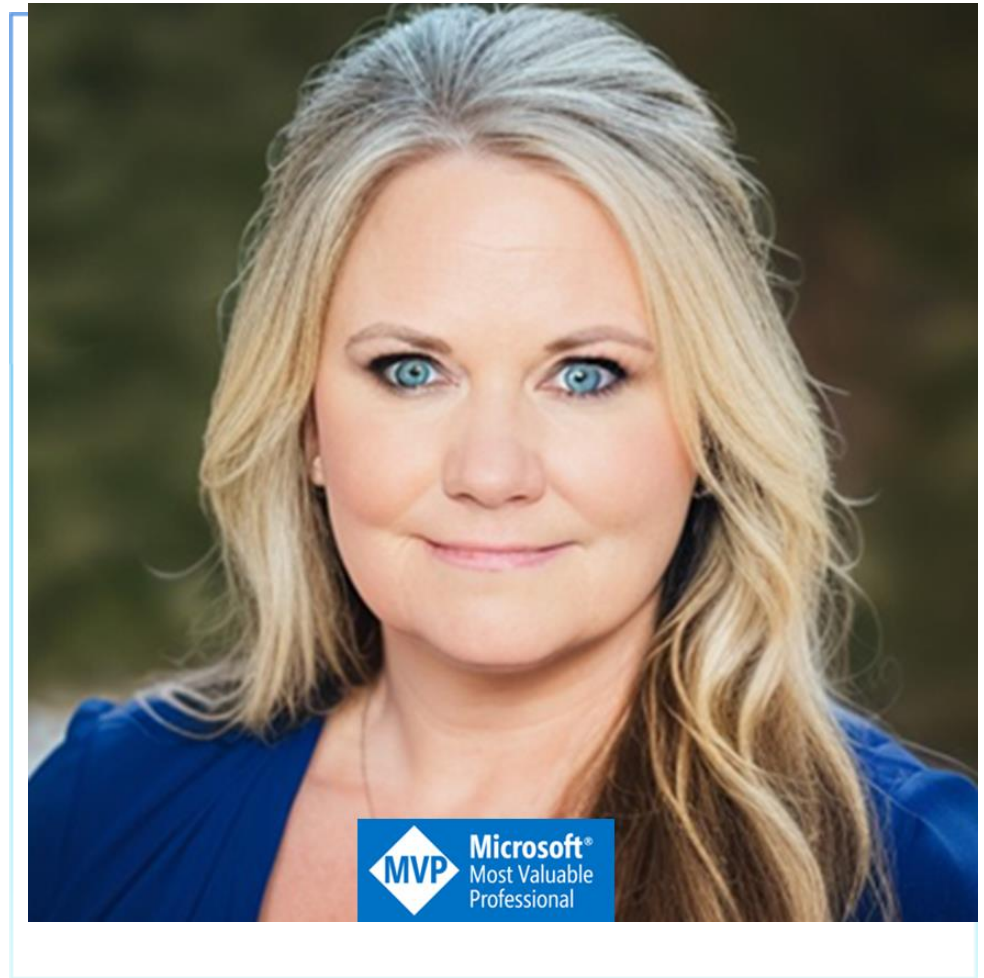
Presented by:

Shannon Mullins

Microsoft MVP



- **Microsoft MVP**
- **Owner and CEO of A BC Consulting Group Consultant Since 2011**
- **Lover of coffee and travel**
- **Accountant and former Controller and Dynamics GP End User**
- **DynamicsCon Live Presenter since 2021**
- **Dynamics Communities Presenter Since 2011**
- **DUG Nashville Leader**
- **Dynamics Minds User Conference Committee Member**
- **Scan QR code for contact info**



Shannon Mullins,
Microsoft MVP

AppSource, Power Platform, Custom DEV in that order?

This session will cover:

- Vetting Requirements and Business Requirements needs
- Evaluating Options for Custom Needs
- Determining AppSource Offerings- Good vs Bad vs Maybe
- Deciding on Power Platform Options
- Scoping Customizations with a Long-term Plan





**Vetting
Requirements and
Business Process
Needs**

Vetting Requirements and Business Process Needs



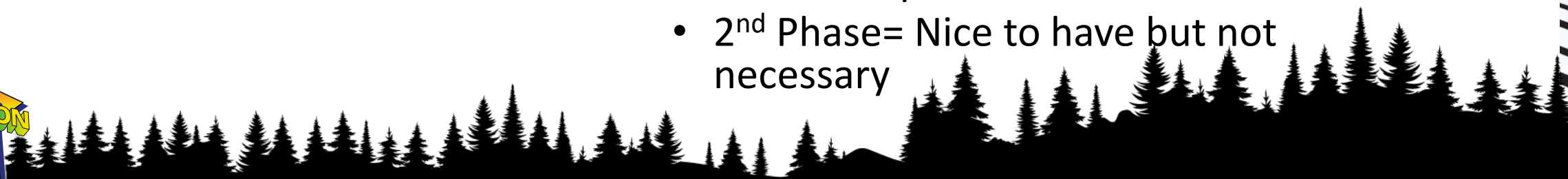
- The top common issues in our last two dozen rescues were because the client and partner did not engage in a discovery process before implementation
- The need for customizations outside of what is included with BC and the Power Platform should be driven from the discovery process
- Junk in=Junk Out
 - Recreating the old wheel is not usually the most efficient way in the age of AI, Automation, and Copilot. Why I avoid migration tools....
- It is never too late to do a checkup discovery to see what gaps still exist.



Vetting Requirements and Business Process Needs



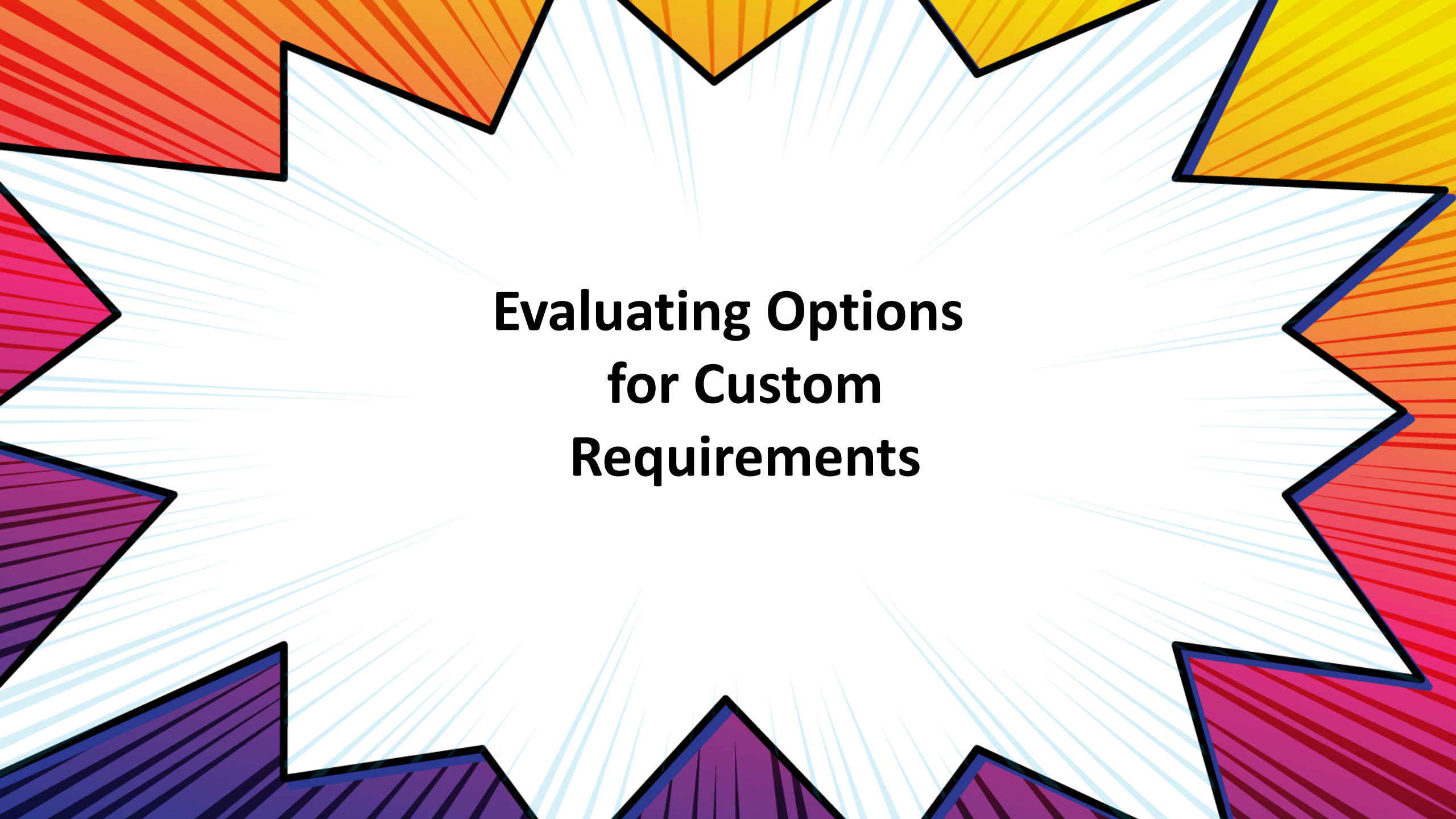
- A discovery should not be led by “juniors”, experts of other ERP solutions, “RFP Specialists”, Pro Google search team members, or space monkeys.
- Each area should be evaluated against BC capabilities and any gaps identified.
- Need to determine between 1st phase and other phase requirements-
 - 1st Phase= Needed to do daily business operations
 - 2nd Phase= Nice to have but not necessary



Vetting Requirements and Business Process Needs

- Discovery is not a one-time thing. It should be done every couple of years to vet current processes against new features and technology
- Copilot and Microsoft AI is in its infancy. Imagine the advancements five years from now.
- Staying ahead of the competition in each industry, also requires the advancement of technology





Evaluating Options for Custom Requirements

Evaluating Options for Custom Requirements

- Once requirements are gathered, we are ready for the next steps of evaluation to determine if gaps should be filled with an AppSource App, a Power Platform functionality, or customizations...
- This determination should be done by a seasoned team member, usually a senior solution architect or other member, who understands BC core capabilities, is aware of the ISV/marketplace offerings, and is also aware of what can be done with custom code.



Evaluating Options for Custom Requirements


AppSource	Power Platform	Custom Code
Over 5.500 apps available to install	Extensibility through Power Apps, Power Automate, Copilot Studio and Power BI	Need a BC developer- this does not mean an old school NAV developer who does not know AL
Most published apps can be tested in a sandbox for free- try to avoid those that can't	Most features are included with Business Central licensing	Should be done with automated testing and pipeline code deployment
Easy apps- installation is with a wizard and does not need a expert	Avoid multi-plexing of licensing.	Code needs to be maintained and tested against future upgrades
Requires testing, testing and more testing	Solutions and templates for what you need could be available through opensource or AppSource	Sometimes code is going to be more work than looking for a solution that is built- but sometimes there is no solution, yet



Evaluating Options for Custom Requirements

AppSource	Power Platform	Custom Code
Know the cost of licensing and/or installation fees before deciding to test it. If you can't afford it, don't get users excited.	Most often low-code to no-code but someone needs to be trained	Can add hours and lots of time to project timelines.
Do a demo with the vendor and ask questions	Might require additional licensing	Rule #1- the developer will always underestimate hours- we call this developer padding.
Vet the vendor's support and SLA contracts. Make sure there is a contact for your country/localization. Can you partner support it?	Ways to provide external user access. Example- vendor portal, customer portal, internal portals. Licensing requirements for accessing BC data need to be evaluated.	Expect a good developer to push back on crazy requirements or make suggestions. They know the code usually better than the solution architect





**Determining
AppSource
Offerings- The
Good vs Bad vs
Maybe**

Determining AppSource Offerings- The Good vs Bad vs Maybe

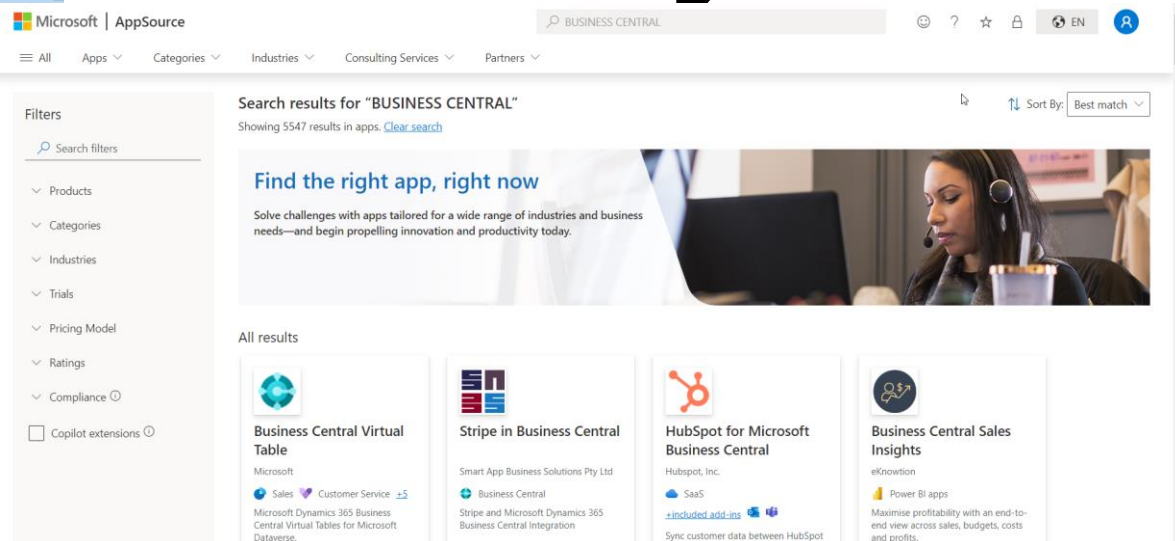
Welcome to the Wild, Wild West- we call AppSource



Determining AppSource Offerings- The Good vs Bad vs Maybe

What you should be aware of when choosing apps from AppSource:

- “Only” over 5,500 apps to choose from (up from 4K in the fall)
- While Microsoft does some soft vetting of app policies, terms and conditions and support, it is not to be taken as a stamp of approval
- Not all ISV partners are created equal and believe in good, solid BC coding with testing and partnership with other apps- This is very, very important
- If an app is not on AppSource but tells you they integrates with “Any” ERP- guess who’s paying for that integration?



Determining AppSource Offerings- The Good vs Bad vs Maybe



How to spot the bad “app”-les

- No way to install from the AppSource marketplace
- No free trial in a sandbox or DEV environment (Buy it or else)
- No clear way to contact or communicate with the app developer
- Very poor website design/hodge podge marketing
- No reviews- not necessarily a red flag but ask for app references
- No documentation, training manual or clear written instructions how to use the app
- Hosted only on the app provider’s servers (holding your data hostage with their app)



Determining AppSource Offerings- The Good vs Bad vs Maybe



How to Spot The Good Apps

- Very it works with your localization!
- Easy to install and configure with wizards for basic apps
- Partner or ISV resources to assist with more complicated apps, partner recommendations
- Clear marketing with demo videos, written manuals, and guides
- Happy reviews and customers
- Free demo/trial or small fee trials
- Good response times
- Written SLA and contract agreements and terms
- Compatibility with other apps or willing to play with other apps



Determining AppSource Offerings- The Good vs Bad vs Maybe

What about the “maybes”?

- Free trial/demo environment
- Start up app but development works soundly
- Willing to have you try it and assist with any issues
- Not a lot of reviews but positive feedback from others
- Sometimes it meets a very niche requirement, and it is a good fit



Hi
I'M NEW HERE





Deciding On Power Platform Options

Deciding On Power Platform Options



Power Automate- Automate and Integrate on Steroids

- Microsoft offers lots of templates for Business Central in the Power Automate center
- Can use automated workflows and integrations, trigger-based events, and/or manual-based events
- Thousands of connectors to other systems including Microsoft competition products
- We do ALLLLLL of our integrations using Power Automate and sometimes a little Azure
- So many wonderful use cases: complex workflows with approvals outside of BC, reminders, create emails based on events, create SharePoint list items and folders, transfer data between systems on an event, update other records based on event triggers and so so much more



Deciding On Power Platform Options

Power Apps- Building apps with low code to no code

- Power apps allows you to build cloud based applications



Deciding On Power Platform Options

Copilot Studio- Automate your manual processes with a mix of chat, power automate and more

- The artist formerly know as Power Virtual agents. What it will be called in 2025? Who knows.... 😊
- Allows for the co-mingling of chat with power automate and triggers to applications.
- Good examples- Teams chat to check on status of an order. Order is late, chat asks if a reminder should be sent to the customer, copilot automatically updates the estimated ship date in BC and emails the customer a confirmation email with new ship dates
- Customer chat on your website to create a request for quote all via a chat bot
- Ask copilot studio for past due AP invoices and send for payment approval
- So so many use cases, not enough time



Deciding On Power Platform Options

Microsoft Fabric



Microsoft Fabric/Power BI- The Analysis Tool for All

- The artist formerly known/still know/might be know as Power BI.
- Data analysis and reporting along with Embedded Paginated reports and power automate flows.
- Fabric (preview) will allow you to connect your data streams (data lakes) to the main “lake house” and allow you to ask Copilot to create you reports and analysis off the data in the warehouse
- Some amazing stuff expected with Microsoft Fabric



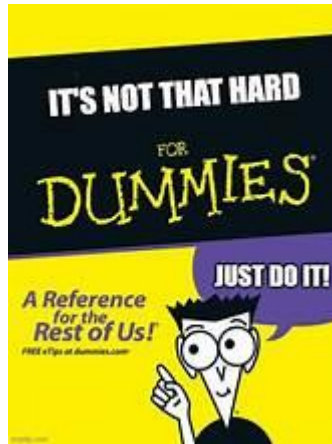


**Scoping
Customizations
with a Long-term
Plan**

Scoping Customizations with a Long-term Plan

Customizations, so many thoughts...

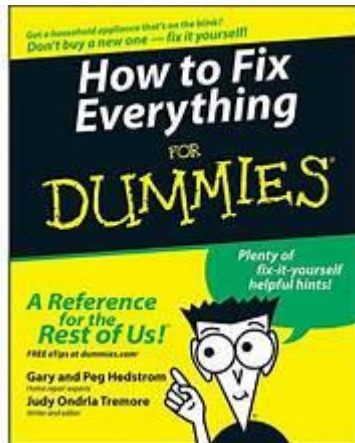
- Not all AL developers are created equally. My requirements for a developer are difficult at best.
- You will need a developer or a wanna-be developer for customizations.
- A good developer is fast, and efficient but also very thorough. A good developer asks lots of questions.
- A good developer did not watch a certain someone's YouTube videos and is not ready to create an HR app for production....
- Just like it took me two decades to become very good at my job, becoming a good developer does not happen overnight.
- Thus said, any code going to production should be reviewed by a senior developer and heavily tested by UAT in DEV.
- There is some really good training for Developers out there. Get trained



Scoping Customizations with a Long-term Plan

Requirements Gathering For Developers

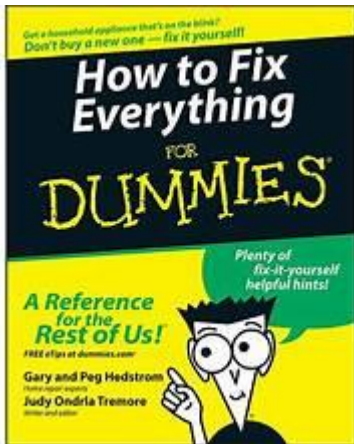
- What tables, windows, fields, BC processes will be effected by this customization?
- Evaluate the what-if scenarios
- If adding fields, where should these transfer to. Adding a simple field could take a full day's work.
- Think outside the box to see if Azure or Power Platform could be used with the BC code units.
- How can a developer develop without requirements?




Scoping Customizations with a Long-term Plan

Build For The Long-Term

- Sure the code works now, but what about the next new release or the one three years from now?
- Automated code testing and deployment via Pipelines is the way to go.
- Customers should ALWAYS retain and have the latest copy of their code. We use GitHub for code sharing.
- Do automated testing against future releases.
- Upgrade sandbox environments early to catch any sneaky issues with new releases.
- Be prepared to change code based on Microsoft's base unit, code unit, unit unit changes.





Q&A

Thank you!
Check out my
other session or
stop by my booth
to meet me!







































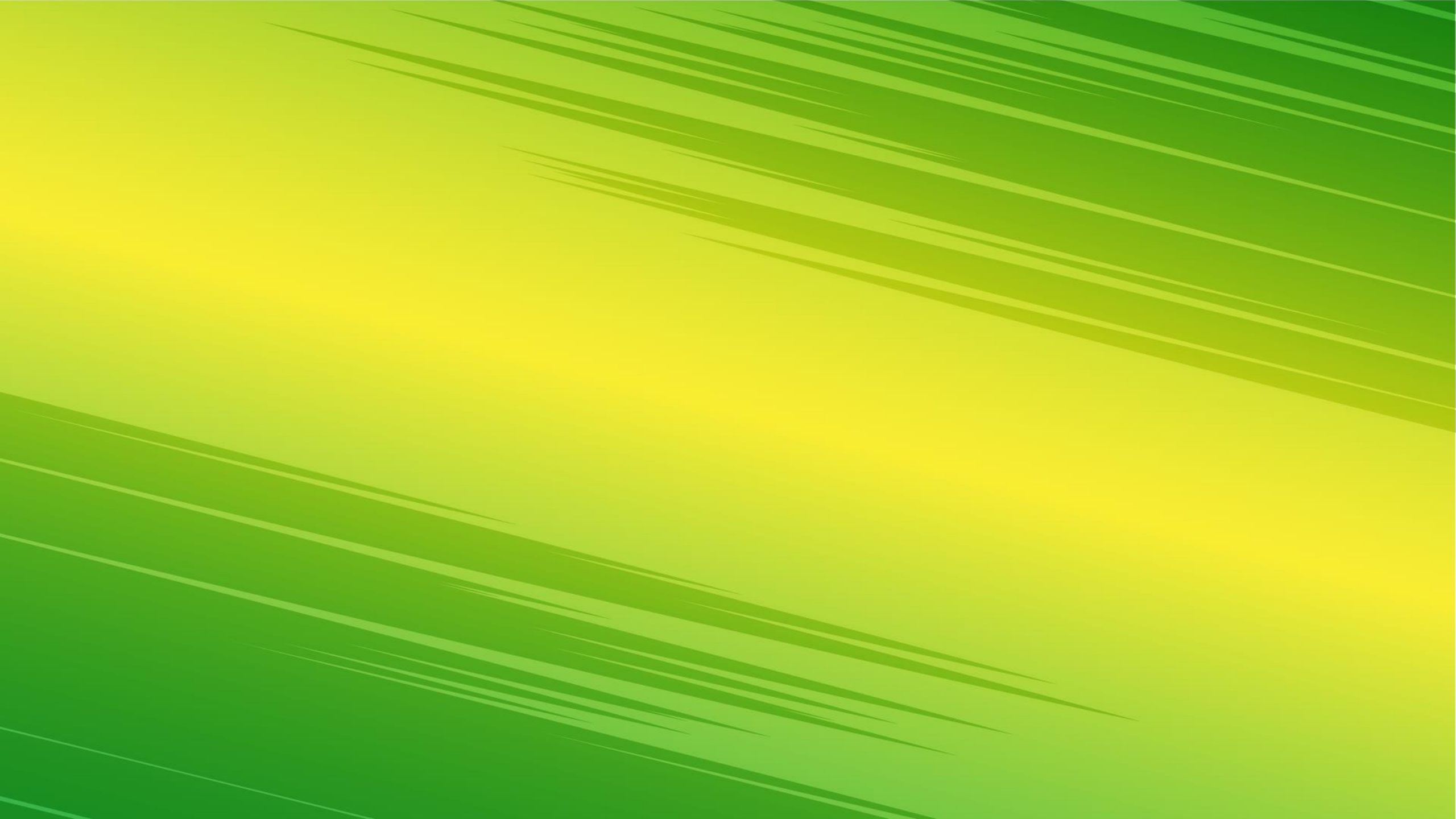




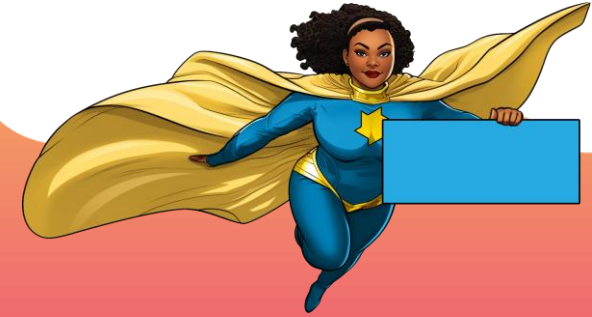








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