



POWERED BY  DUG

# DYNAMICS CON LIVE

MAY 2024

# Modal Custom Pages, Modern Commanding, and More - Level Up with Low Code

DynamicsCon 2024  
Denver, Colorado



# Presenters



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# Agenda



- History of Low Code
- Custom Pages
- Modern Commanding
- Low-Code Dialogs
- Best Practices

# History of Low Code



- Dynamics has always been low code...
- But code still crucial for even simple things
- Skillset needs are changing
- Era of enablement
  - Empowering “citizen developers” to get started
  - Much like they would in Excel







# Microsoft Power Platform

The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



## Power BI

Business analytics



## Power Apps

App development



## Power Automate

Process automation



## Power Virtual Agents

Intelligent virtual agents



## Power Pages

External-facing websites



Data  
connectors



AI Builder



Dataverse



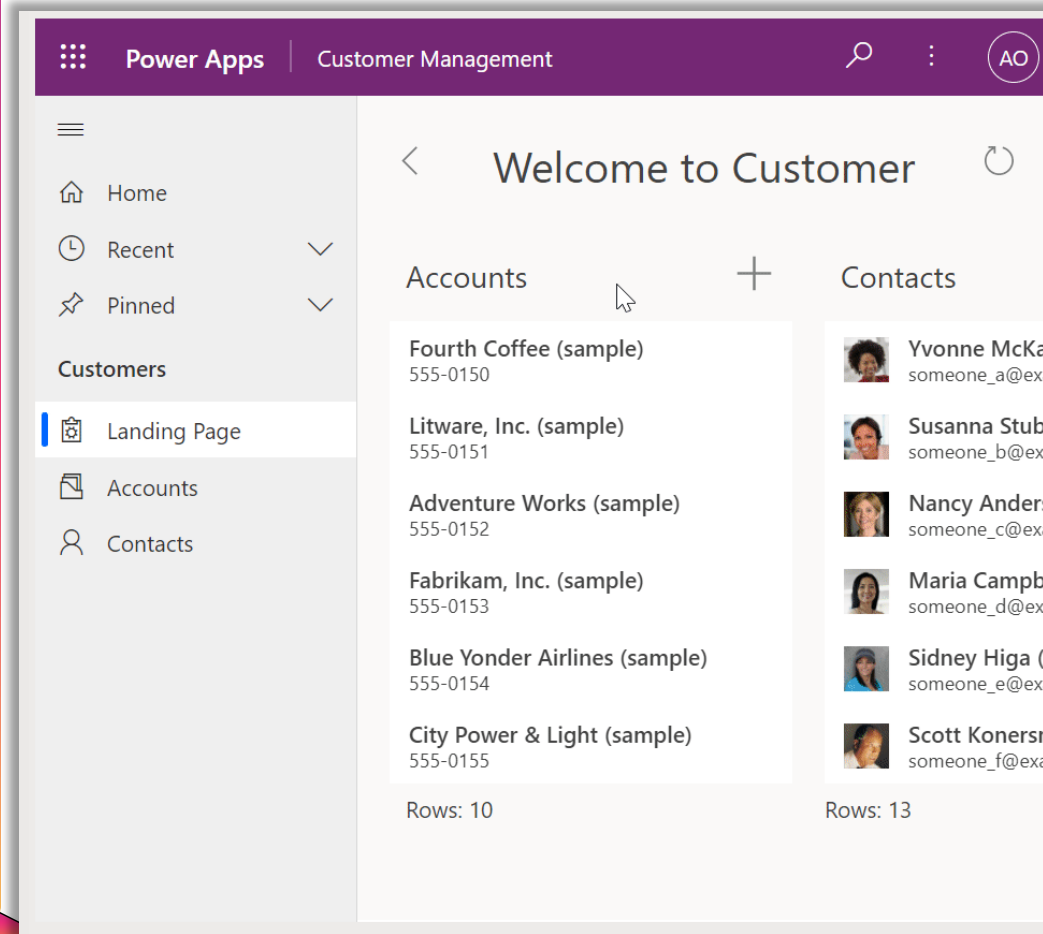
Power Fx



# Custom Pages



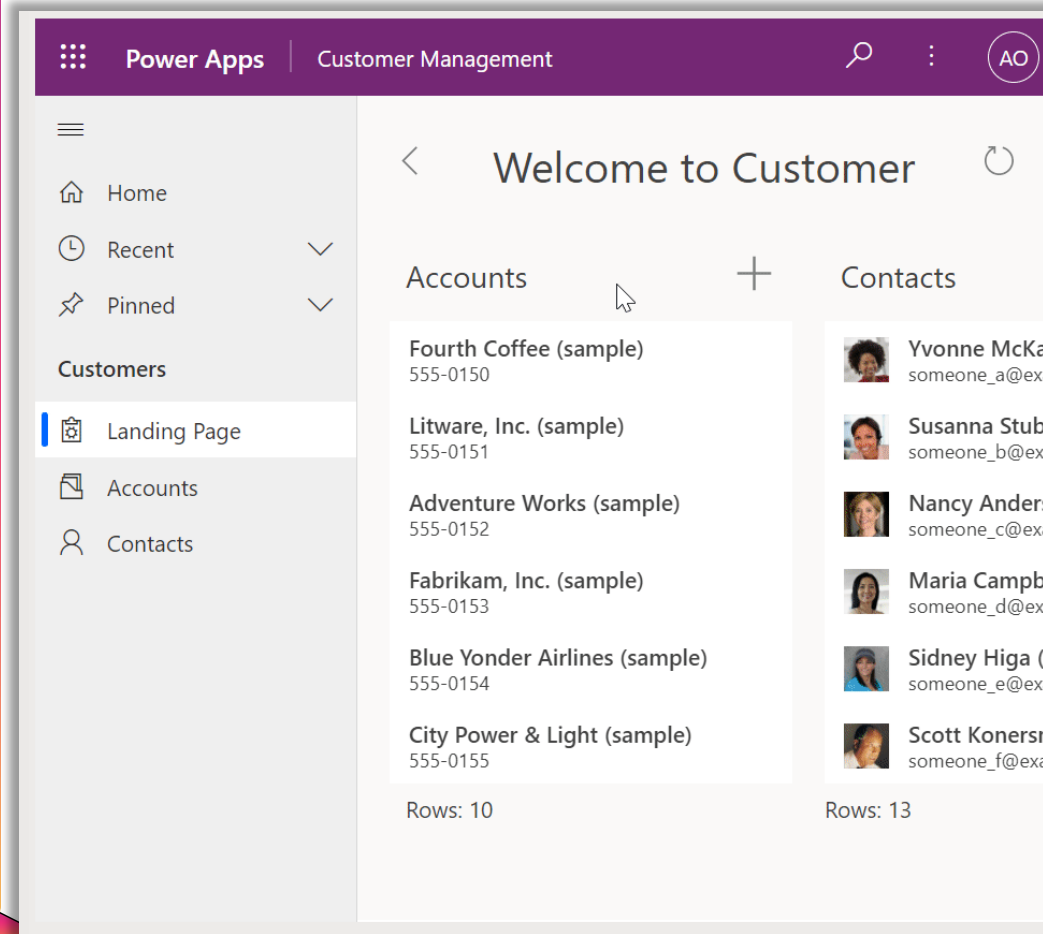
# Intro to Custom Pages



- Convergence of model-driven and canvas apps
- Essentially a canvas app but more deeply embedded
- Low-code page authoring experience
- More flexibility than model-driven forms, views, and dashboards
- Power Platform connectors
- Some controls unavailable



# Intro to Custom Pages

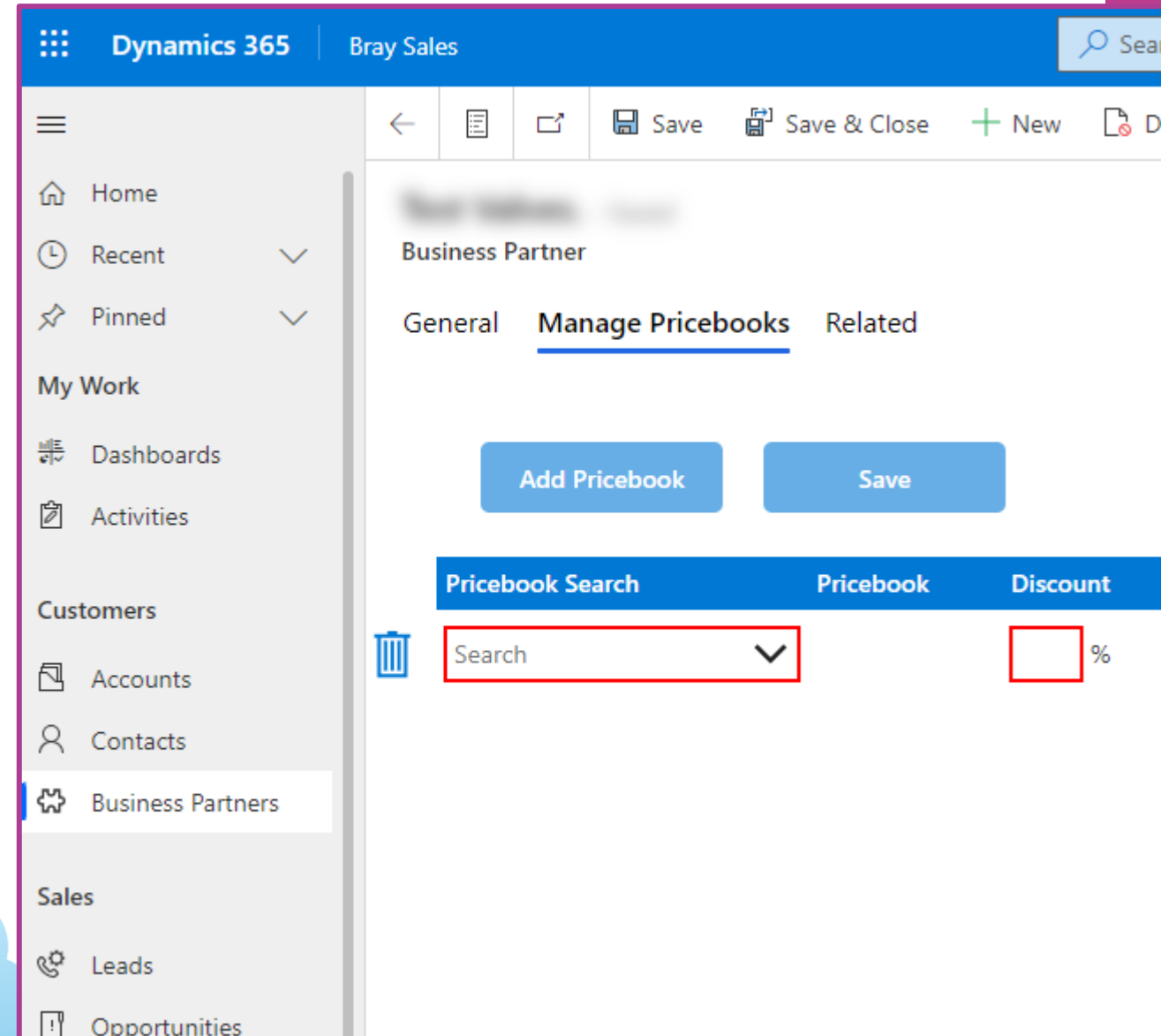


- Full pages
- Centered dialogs
- Side dialogs
- Side panes (persistent)



# Same as Canvas Apps?

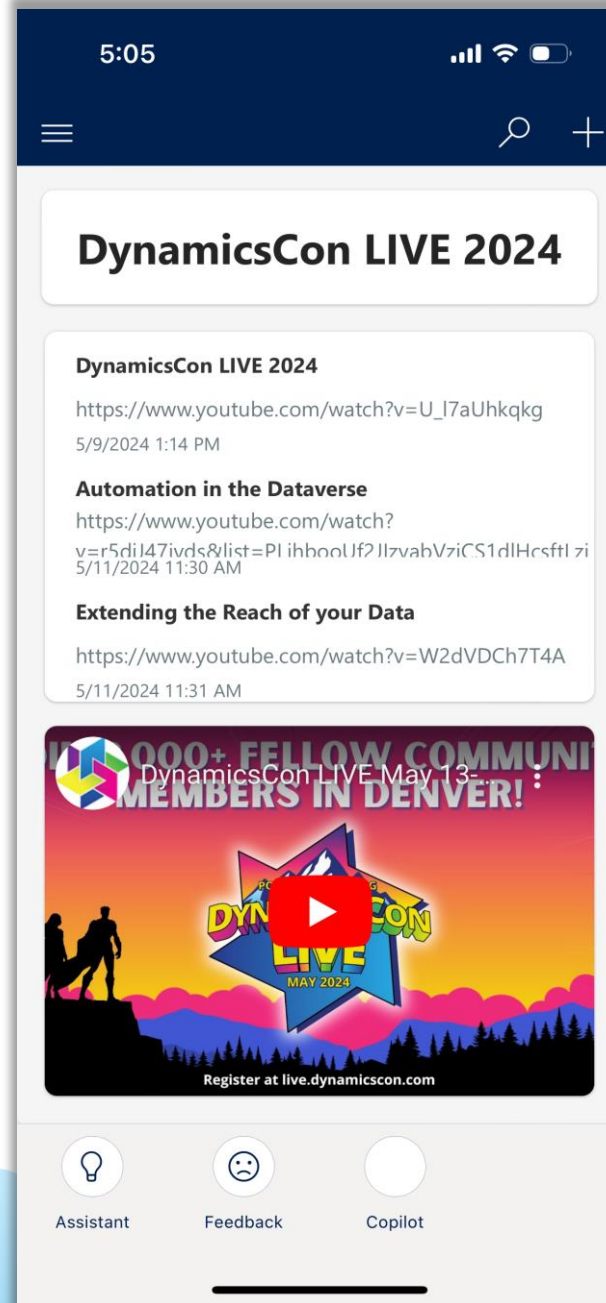
- No limits to how many apps
- More aware of the model-driven app
- Embedded canvas apps limited to model-driven forms
- Fewer issues deploying
- No more sharing



The screenshot displays the Dynamics 365 user interface for a 'Bray Sales' user. The left-hand navigation pane includes sections for 'My Work' (Dashboards, Activities), 'Customers' (Accounts, Contacts, Business Partners), and 'Sales' (Leads, Opportunities). The 'Business Partners' section is currently selected. The main content area shows the 'Business Partner' record with tabs for 'General', 'Manage Pricebooks', and 'Related'. The 'Manage Pricebooks' tab is active, featuring an 'Add Pricebook' button and a 'Save' button. Below this, a table is visible with columns for 'Pricebook Search', 'Pricebook', and 'Discount'. The 'Pricebook Search' column contains a search dropdown menu with a red border, and the 'Discount' column contains an empty input field with a red border and a '%' symbol.

# Custom Pages Demos

- See them in action
- See how to build them
- Templates



# Side Dialog

Dynamics 365 | Field Service

New look            SA

← Focused view Show Chart + New Delete Refresh Collaborate Share

My Active Accounts  Edit columns Edit filters Filter by keyword

<input type="checkbox"/>	Account Name ↑	Main Ph...	Address ...	Primary Contact	Email (Primary Co...
<input type="checkbox"/>	A Datum Fabrication	303-555-0...	Denver		
<input type="checkbox"/>	A Datum Integration	512-555-0...	Austin		
<input type="checkbox"/>	A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@examp...
<input type="checkbox"/>	Adventure Works	812-555-0...	Moorhead	Amos Conger	
<input type="checkbox"/>	Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sa...	someone_c@examp...
<input type="checkbox"/>	Adventure Works Electronics	305-555-0...	Tampa	Brandie Diaz	
<input type="checkbox"/>	Adventure Works Engineering	917-555-0...	New York	Eva Colon	
<input type="checkbox"/>	Adventure Works Instrumentation	813-555-0...	Tampa	Consuelo Moses	
<input type="checkbox"/>	Adventure Works Integration	412-555-0...	Pittsburgh	Deedie Blackburn	

Rows: 82



← Focused view Show Chart + New Delete Refresh Collaborate Share

My Active Accounts  Edit columns Edit filters Filter by keyword

<input type="checkbox"/>	<input type="checkbox"/> Account Name ↑	Main Ph...	Address ...	Primary Contact	Email (Primary Co...
<input type="checkbox"/>	A Datum Fabrication	303-555-0...	Denver		
<input type="checkbox"/>	A Datum Integration	512-555-0...	Austin		
<input type="checkbox"/>	A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@examp...
<input type="checkbox"/>	Adventure Works	812-555-0...	Moorhead	Amos Conger	
<input type="checkbox"/>	Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sa...	someone_c@examp...
<input type="checkbox"/>	Adventure Works Electronics	305-555-0...	Tampa	Brandie Diaz	
<input type="checkbox"/>	Adventure Works Engineering	917-555-0...	New York	Eva Colon	
<input type="checkbox"/>	Adventure Works Instrumentation	813-555-0...	Tampa	Consuelo Moses	
<input type="checkbox"/>	Adventure Works Integration	413-555-0...	Pittsburgh	Debbie Blackburn	

Rows: 82



# Home Page

The screenshot shows the Microsoft Dynamics 365 Field Service home page. At the top, the navigation bar includes the Dynamics 365 logo, 'Field Service', a 'New look' toggle, and various utility icons. A notification banner at the top left states 'Your free trial will expire soon.' with a 'Buy now' button. The main content area greets the 'System Administrator' and provides a welcome message. Below this, there are three featured updates, each with a 'New' badge, a title, a description, an image, and a 'Learn more' button. The first update is about 'Guides and Remote Assist', the second is 'Copilot in Dynamics 365 Field Service', and the third is 'Optimized product information'. A left-hand navigation pane contains icons for home, recent, and other views. A right-hand pane shows a user profile icon and a chat icon.

Dynamics 365 | Field Service

New look

Your free trial will expire soon. [Buy now](#)

## Hello, System Administrator.

Welcome to Microsoft Dynamics 365 Field Service  
Streamline service delivery with next-generation tools for your frontline.

[Learn more about Field Service](#)

**New**  
**Guides and Remote Assist now part of your license**

Create Guides for training and work instructions. Enable technicians to collaborate with experts in real-time when they need additional assistance.

[Learn more](#)

**New**  
**Copilot in Dynamics 365 Field Service**

Leverage the power of Copilot to create and schedule work orders using AI in Microsoft Outlook and Microsoft Teams.

[Get Outlook add-in](#) [Get Teams add-in](#)

**New**  
**Optimized product information**


Reduce time to experience product information

[Learn more](#)







 Your free trial will expire soon.

[Buy now](#)

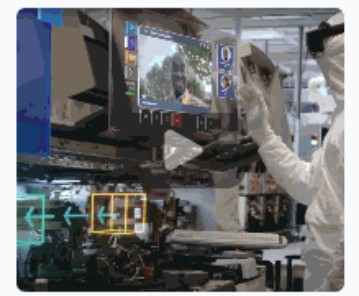
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[Learn more](#)

**New**  
**Copilot in Dynamics 365 Field Service**

Leverage the power of Copilot to create and schedule work orders using AI in Microsoft Outlook and Microsoft Teams.



[Get Outlook add-in](#)

[Get Teams add-in](#)

**New**  
**Optimize your field service experience**

Reduce time to service  
Improve technician productivity  
Streamline information flow

[Learn more](#)

# Video Player

Dynamics 365 | Field Service

New look  🔍 💡 + 🗑️ 🔔 ⚙️ ? 😊 🔄 🗨️ SA

← 📄 Focused view 📊 Show Chart + New 🗑️ Delete | 🔄 Refresh 📊 Visualize this view ⋮ Share

**Active Video Links\***  Edit columns  Edit filters

<input type="checkbox"/> Name ↑	<input type="checkbox"/> Link to Video ↓
<input type="checkbox"/> Automation in the Dataverse	<a href="https://www.youtube.com/watch?v=r5diJ47jyds&amp;list=PLihbooUf2JlzyabV">https://www.youtube.com/watch?v=r5diJ47jyds&amp;list=PLihbooUf2JlzyabV</a>
<input type="checkbox"/> DynamicsCon LIVE 2024	<a href="https://www.youtube.com/watch?v=U_I7aUhkqkg">https://www.youtube.com/watch?v=U_I7aUhkqkg</a>
<input type="checkbox"/> Extending the Reach of your Data with Embedded Apps	<a href="https://www.youtube.com/watch?v=W2dVDCh7T4A">https://www.youtube.com/watch?v=W2dVDCh7T4A</a>

Rows: 3



← 📄 Focused view 📊 Show Chart ➕ New 🗑️ Delete ⌵ 🔄 Refresh 📊 Visualize this view ⋮ 🔗 Share


### Active Video Links\* ⌵

📄 Edit columns 🔍 Edit filters 🔍 Filter by keyword

<input type="checkbox"/> Name <span>↑</span> <span>⌵</span>	Link to Video <span>⌵</span>
<input type="checkbox"/> Automation in the Dataverse	<a href="https://www.youtube.com/watch?v=r5diJ47jyds&amp;list=PLihbooUf2JIzyabV">https://www.youtube.com/watch?v=r5diJ47jyds&amp;list=PLihbooUf2JIzyabV</a>
<input type="checkbox"/> DynamicsCon LIVE 2024	<a href="https://www.youtube.com/watch?v=U_I7aUhkqkg">https://www.youtube.com/watch?v=U_I7aUhkqkg</a>
<input type="checkbox"/> Extending the Reach of your Data with Embedded Apps	<a href="https://www.youtube.com/watch?v=W2dVDCh7T4A">https://www.youtube.com/watch?v=W2dVDCh7T4A</a>

Rows: 3



Fill ▾ = fx  ▾ **RGBA(255, 255, 255, 1)** ▾


### Tree view

Search

- App
  - Screen1
    - ScreenContainer2
      - HeaderContainer2
        - TextCanvas2
      - BottomContainer1
        - SidebarContainer1
          - Gallery1
            - TextCanvas1
            - Body1
            - Title1
            - ProfileImage1

### DynamicsCon LIVE 2024

DynamicsCon LIVE 2024  
[https://www.youtube.com/watch?v=U\\_I7aUhkqkg](https://www.youtube.com/watch?v=U_I7aUhkqkg)  
5/9/2024 1:14 PM



Automation in the Dataverse  
<https://www.youtube.com/watch?>

Screen1 50 % ↗

# Low-Code Plugins

The screenshot shows the Dynamics 365 Field Service interface. At the top, there's a navigation bar with 'Dynamics 365 | Field Service', a 'New look' toggle, and various utility icons. Below this is a header area with 'New plug-in' and 'Refresh' buttons, and a search bar. The main content area features a 'Dataverse Accelerator' banner with an illustration of robotic arms and a truck. Below the banner is a section titled 'Low Code Plug-ins' with two options: 'Create instant plug-in' and 'Create automated plug-in'. At the bottom, there's a table of plug-ins with columns for 'Display name', 'Created by', and 'Modified on'.

**Dataverse Accelerator**  
Discover the latest feature set available in Dataverse with more guidance on when and how to use each capability, and get value from Dataverse faster.  
This Dataverse feature is in preview. [See terms](#)

### Low Code Plug-ins

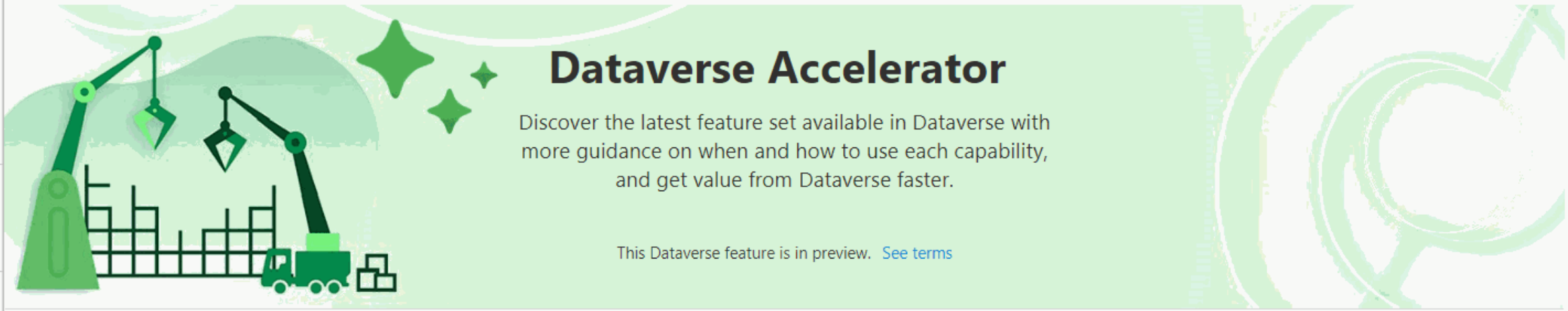
- Create instant plug-in**  
Reusable logic that can be invoked in apps, flows, or from the Dataverse API when needed.
- Create automated plug-in**  
Perform tasks automatically after a designated table event happens in Dataverse.

Instant	Automated	
Display name	Created by	Modified on
Send in-app notification	SYSTEM	2/17/2024 4:35:39 AM



+ New plug-in ▼ Refresh

Search



# Dataverse Accelerator

Discover the latest feature set available in Dataverse with more guidance on when and how to use each capability, and get value from Dataverse faster.

This Dataverse feature is in preview. [See terms](#)

## Low Code Plug-ins



### Create instant plug-in

Reusable logic that can be invoked in apps, flows, or from the Dataverse API when needed.



### Create automated plug-in

Perform tasks automatically after a designated table event happens in Dataverse.

**Instant** Automated

Display name	Created by	Modified on
Send in-app notification	SYSTEM	2/17/2024 4:35:39 AM

# Start From a Template

The screenshot displays the Microsoft Power Apps interface for a 'Field Service' environment (CRM011668). The main workspace shows a 'Video Page' template being configured. The page content includes a header 'Dynamics 365 | Field Service', a main title 'DynamicsCon LIVE 2024', and two video thumbnails: 'DynamicsCon LIVE 2024' and 'Automation in the Dataverse'. The right-hand pane shows the configuration options for the 'Video Page' template, including 'Display options', 'Content type' (set to 'Custom page'), 'Page' (set to 'Video Page'), 'Title' (set to 'Video Page'), 'Icon' (set to 'Use web resource'), 'Like icon' (with a 'Select icon' button), and 'ID' (set to 'subarea\_22370668'). The left-hand pane shows the 'Navigation' menu with options like 'My Work', 'Get Started view', 'Get Started form', 'Dashboards', 'Custom Pages', 'Admin Home Page', 'Video Page' (selected), 'Dataverse Actions Page', 'Supporting Tables', 'Accounts view', and 'Accounts form'. The bottom of the interface shows a responsive design view with a zoom level of 100%.



- Pages
- Data
- Automation

# Pages + New

Service 🔍

## Navigation

- ☰ My Work
  - ▶ Get Started view
  - 📄 Get Started form
  - 📊 Dashboards
- ☰ Custom Pages
  - 🏠 Admin Home Page
  - 📄 Video Page** ⋮
  - ⚡ Dataverse Actions Page
- ☰ Supporting Tables
  - 📄 Accounts view
  - 📄 Accounts form

# DynamicsCon LIVE 2024

- DynamicsCon LIVE 2024**  
[https://www.youtube.com/watch?v=U\\_I7aUhkqkg](https://www.youtube.com/watch?v=U_I7aUhkqkg)  
5/9/2024 1:14 PM
- Automation in the Dataverse**  
<https://www.youtube.com/watch?v=r5diU47ivds&list=PLibboeUf2UzvbVziCS1dlHcft>



## Video Page >

### ^ Display options

Content type  
Custom page

Page  
Video Page

Title  
Video Page

Icon  
Use web resource

Like icon  
Select icon

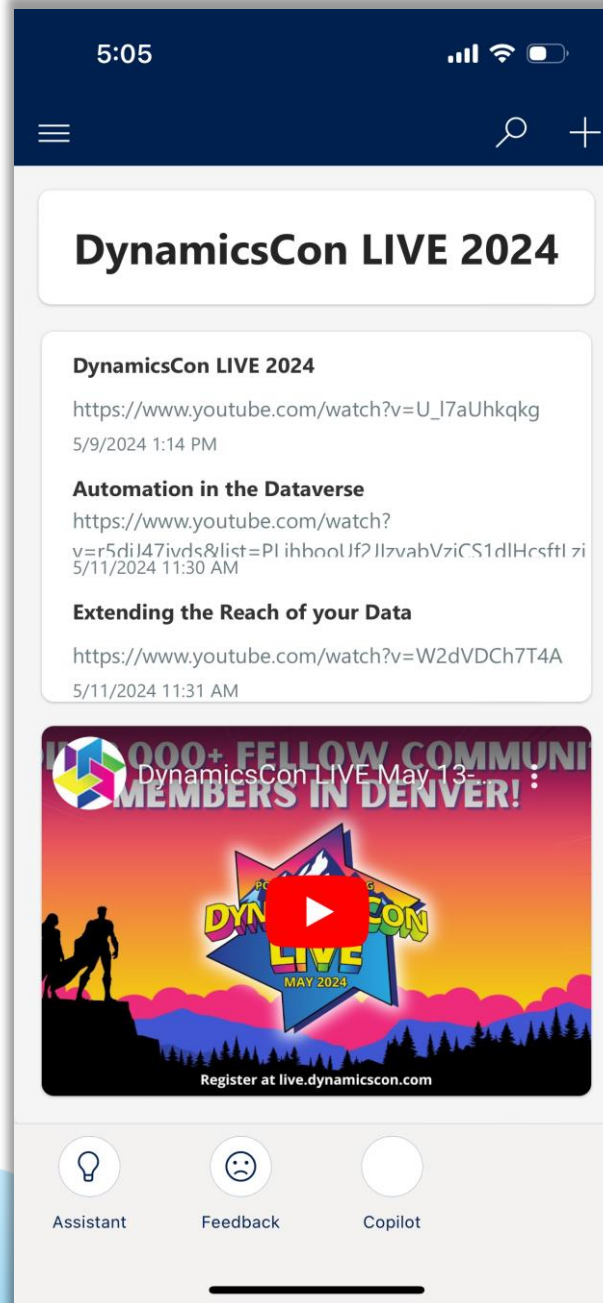
ID \*  
subarea\_22370668



# Custom Pages Demos

## Best Practices + Tips:

- Always use containers
- Handle errors with every action
- Consider navigation
- Don't veer too far from default styling/sizing
- Avoid multiple pages



# Modern Commanding



# Ribbon Workbench

The screenshot displays the Ribbon Workbench application interface. At the top, the title bar reads "Tools Ribbon Workbench (Stein DEV)". Below this, a purple header bar contains "Stein DEV" and "Ribbon Workbench 3.1.647.1.9 by Scott Durow". The main workspace is divided into three horizontal toolbars for different views: Home, SubGrid, and Form. Each toolbar contains various icons for actions like NEW, EDIT, DELETE, and QUALIFY. Below the toolbars, there are tabs for "UNIFIED INTERFACE" and "CLASSIC". On the left, a "Toolbox" pane lists various UI controls like BUTTON, SPLIT BUTTON, and GROUP. The "Properties: Control" pane on the right shows details for a selected control, including fields for Id, Command, Label, Alt, Tool Tip Title, Tool Tip Description, Image 16, Image 32, ModernImage, and Sequence.

Tools Ribbon Workbench (Stein DEV)

Stein DEV

Ribbon Workbench 3.1.647.1.9 by Scott Durow Open Solution Publish RibbonWorkbenchLeadDisqualification\_04042024 ? Help

Home Mscrm.HomepageGrid.lead.MainTab

SubGrid Mscrm.SubGrid.lead.MainTab

Form Mscrm.Form.lead.MainTab

UNIFIED INTERFACE CLASSIC

Toolbox SOLUTION ELEMENTS XML MESSAGES (0) CLIPBOARD

Entity: lead

TABS (0)

GROUPS (0)

BUTTONS (1)

HIDE ACTIONS (1)

COMMANDS (5)

COMMANDS (2)

HIDE ACTIONS (1)

BUTTONS (1)

Properties: Control

LANGUAGE: English - United States[1033]

Property	Value
Id	Mscrm.HomepageGrid.lead.ConvertLeadQuick.Web
Command	
Label	Qualify
Alt	Qualify
Tool Tip Title	Qualify
Tool Tip Description	Create a new opportunity with an account or a contact using information from this lead.   When th
Image 16	\$webresource:MarketingSales/_imgs/ribbon/ConvertLead_16.png
Image 32	\$webresource:MarketingSales/_imgs/ribbon/ConvertLead_32.png
ModernImage	Qualify
Sequence	6



# Intro to Modern Commanding

Power Apps | Field Service > Field Service Expenses > Main form

← Back + New ▾ Duplicate Hide Delete ... Open component library Save and Publish Play

fx

### Commands

Search

- + New ▾
- Save & Close
- + New
- + New
- Summarize
- Activate
- Queue Item Details
- Deactivate
- Clone
- Split Expense
- Compare ▾
- Power Fx
  - Confirm
- Javascript
  - Confirm
- Book

Set Regarding View in Dynamics 365 Save Mark Complete Save & Close

+ New + New Summarize Activate Queue Item Details Deactivate

Clone Split Expense Compare ▾ Book Save & Route Delete

Open Active Stage Export to PDF Check Access Refresh Open Yammer

Collaborate Close {EntityDisplayNa... Process ▾ Connect sequence

Disconnect sequence Sequences ▾ Launch playbook To Opportunity

To Case Add to Queue Queue Item Details Assign View Hierarchy

Share Share Secured Fields Email a Link Follow Unfollow Unfollow

Flow ▾ Flow ▾ Word Templates ▾ Run Report ▾

### Command

Save & Close

ⓘ This button is read-only. Legacy button is not supported at the moment. [Learn more](#)

Label  
Save & Close

Icon  
Use Icon ▾  
SaveAndClose ▾

Action ⓘ  
Run JavaScript ▾

Library  
Main\_system\_library.js ▾  
+ Add library  
XrmCore.Commands.Save.saveAnd...



# Finding the Command Bar





### Objects <

🔍 Search

☰ All (21)

📁 Apps (1)

📄 Cards (0)

🗣️ Chatbots (0)

📄 Cloud flows (1)

📁 Component libraries (1)

🔗 Connection references (3)

📄 Pages (7)

📄 Site maps (1)

> 📄 Tables (5)

> 🌐 Web resources (2)

+ New ▾ 📁 Add existing ▾ ✎ Edit ▾ ▶ Play 📄 Share 📊 Monitor ⏻ Turn off 🗣️ Add to Teams ⋮

🔍 Search

### Custom Pages - Connect and DynamicsCon > Apps

✓	☰	Display name ↑ ▾	Name ▾	Type ▾	Managed ▾	Last Modif... ▾	Owner ▾	Status
✓	📄	Field Service	msdyn_FieldServi...	Model-Driven App	Yes	4 hours ago	-	On

# Types of Commands

Power Apps | (Loading) > (Loading) > Main form

Environment CRM011668

← Back | + New | Duplicate | Hide | Delete | ...

Open component library | Save and Publish | Play

fx

### Commands

Search

+ New

- To Case
- Add to Queue
- Queue Item Details
- Assign
- View Hierarchy
- Share
- Share Secured Fields
- Email a Link
- Follow
- Unfollow
- Unfollow

Flow

Flow

Approve | Return | Set Regarding | Submit | Submit | Recall | Clone

View in Dynamics 365 | Mark Complete | Save & Close | New | New

Summarize | Queue Item Details | Book | Save & Route | Delete

Open Active Stage | Export to PDF | Check Access | Refresh | Open Yammer

Collaborate | Close (EntityDisplayNa... | Process | Connect sequence

Disconnect sequence | Sequences | Launch playbook | To Opportunity

To Case | Add to Queue | Queue Item Details | Assign | View Hierarchy

Share | Share Secured Fields | Email a Link | Follow | Unfollow | Unfollow

Flow | Flow | Word Templates | Run Report

### Command

Flow

This button is read-only. Legacy button is not supported at the moment. [Learn more](#)

Label

Flow

Icon

Use Icon

Flows

Tooltip title

Flows

Tooltip description

Flows Menu



← Back | + New ▾ | Duplicate | Hide | Delete | ...

Open component library | Save and Publish | Play

Form field with a dropdown arrow, an equals sign, and the text 'fx'.

### Commands

Search input field with a magnifying glass icon and the text 'Search'.

+ New ▾

- To Case
- Add to Queue
- Queue Item Details
- Assign
- View Hierarchy
- Share
- Share Secured Fields
- Email a Link
- Follow
- Unfollow
- ★ Unfollow
- > Flow
- > Flow

✓ Approve   ✕ Return   🔗 Set Regarding   📄 Submit   📄 Submit   ↶ Recall   📄 Clone  
 ▶ View in Dynamics 365   ✓ Mark Complete   📄 Save & Close   + New   + New  
 📄 Summarize   📄 Queue Item Details   📅 Book   ↶ Save & Route   🗑 Delete  
 📄 Open Active Stage   📄 Export to PDF   🔍 Check Access   ↶ Refresh   🗨 Open Yammer  
 🗨 Collaborate   ✕ Close {EntityDisplayNa...   📄 Process ▾   📄 Connect sequence  
 ✕ Disconnect sequence   📄 Sequences   📄 Launch playbook   📄 To Opportunity  
 🔗 To Case   📄 Add to Queue   📄 Queue Item Details   🗨 Assign   📄 View Hierarchy  
 📄 Share   📄 Share Secured Fields   🗨 Email a Link   ☆ Follow   Unfollow   ★ Unfollow  
 📄 Flow ▾   📄 Flow ▾   📄 Word Templates ▾   📄 Run Report ▾

### Command

Flow

*i* This button is read-only. Legacy button is not supported at the moment. [Learn more](#)

#### Label

Flow

#### Icon

Use Icon ▾

Flows ▾

#### Tooltip title

Flows

#### Tooltip description

Flows Menu



# Confirmation Dialog



← Back + New ▾ Duplicate Hide Delete ...

Open component library Save and Publish Play

fx

### Commands

Search

- + New ▾
- Confirm
- JavaScript
- Confirm
- Book
- Save & Route
- Delete
- Open Active Stage
- Export to PDF
- Check Access
- Refresh
- Open Yammer
- Collaborate
- Close {EntityDisplayNa...

Set Regarding View in Dynamics 365 Save Mark Complete Save & Close

+ New + New Summarize Activate Queue Item Details Deactivate

Clone Split Expense **Compare ▾** Book Save & Route Delete

Power Fx

Open Active Stage Export to PDF Check Access Refresh Open Yammer

Confirm

Collaborate Close {EntityDisplayNa... Process ▾ Connect sequence

JavaScript

Disconnect sequence Sequences ▾ Launch playbook To Opportunity

To Case Add to Queue Queue Item Details Assign View Hierarchy

Share Share Secured Fields Email a Link Follow Unfollow Unfollow

Flow ▾ Flow ▾ Word Templates ▾ Run Report ▾

### Command

Compare

#### Label

Compare

#### Icon

No Icon ▾

#### Visibility ⓘ

Show ▾

#### Tooltip title

#### Tooltip description

#### Accessibility text

# Time Entry Demo

← | 📄 | 📄 | 📄 Submit | 📄 Clone | 📄 Save | 📄 Submit | 📄 Save & Close | + New | 🗑️ Delete | 🔄 Refresh | 🔍 Check Access | 📄 Process ▾ | 👤 Assign | 📄 Share | 📧 Email a Link | ⋮ | 📄 Share ▾

## New Time Entry - Saved

Time Entry

General Related ▾

Start	*	4/30/2024	📅	8:00 AM	▾
End		4/30/2024	📅	12:00 PM	▾
Duration	*	4 hours			▾
Type	*	Vacation			
Entry Status		🔒 Draft			

Bookable Resource	🔒 System Administrator	✕ 🔍
Work Order	---	🔍
Bookable Resource Booking	---	🔍
Booking Status	🔒	

Description	---
External Comments	---
Time Off Request	🔒



← Back | + New ▾ | 📄 Duplicate | 🚫 Hide | 🗑️ Delete | ⋮

📖 Open component library | 💾 Save and Publish | ▶ Play

```
OnSelect = fx Patch('Time Entries', Self.Selected.Item, { 'Entry Status': msdyn_timeentrystatus.Submitted } );
```

**Commands** ✕

🔍 Search

+ New ▾

- ✓ Approve
- ✕ Return
- 🔗 Set Regarding
- 📄 Submit** ⋮
- 📄 Submit
- ↶ Recall
- 📄 Clone
- ▶ View in Dynamics 365
- ✓ Mark Complete
- 📄 Save & Close
- + New
- + New
- 📄 Summarize

✓ Approve ✕ Return 🔗 Set Regarding **📄 Submit** 📄 Submit ↶ Recall 📄 Clone

▶ View in Dynamics 365 ✓ Mark Complete 📄 Save & Close + New + New

📄 Summarize 📄 Queue Item Details 📅 Book ↶ Save & Route 🗑️ Delete

📄 Open Active Stage 📄 Export to PDF 🔍 Check Access ↶ Refresh 🗨️ Open Yammer

👥 Collaborate ✕ Close {EntityDisplayNa... 📄 Process ▾ 📄 Connect sequence

✕ Disconnect sequence 📄 Sequences ▾ 📄 Launch playbook 📄 To Opportunity

🔗 To Case 📄 Add to Queue 📄 Queue Item Details 👤 Assign 📄 View Hierarchy

📄 Share 📄 Share Secured Fields 📄 Email a Link ☆ Follow Unfollow ☆ Unfollow

📄 Flow ▾ 📄 Flow ▾ 📄 Word Templates ▾ 📄 Run Report ▾

**Command** >

Submit

**Label**

Submit

**Icon**

Use Icon ▾

Activate ▾

**Action** ⓘ

Run formula ▾

fx Open formula bar

**Visibility** ⓘ

Show on condition from formula ▾

fx Open formula bar

# Approve



← Back | + New ▾ | 📄 Duplicate | 🚫 Hide | 🗑️ Delete | ⋮

📁 Open component library | 💾 Save and Publish | ▶ Play

```
OnSelect = fx Patch('Time Entries', Self.Selected.Item, { 'Entry Status': msdyn_timeentrystatus.Approved } );
```

- ### Commands
- 
- + New ▾
  - ✓ Approve
  - ✕ Return
  - 🔗 Set Regarding
  - 📄 Submit
  - 📄 Submit
  - 🔄 Recall
  - 📄 Clone
  - ▶ View in Dynamics 365
  - ✓ Mark Complete
  - 📄 Save & Close
  - + New
  - + New
  - 📄 Summarize

✓ Approve ✕ Return 🔗 Set Regarding 📄 Submit 📄 Submit 🔄 Recall 📄 Clone

▶ View in Dynamics 365 ✓ Mark Complete 📄 Save & Close + New + New

📄 Summarize 📄 Queue Item Details 📅 Book 📄 Save & Route 🗑️ Delete

📄 Open Active Stage 📄 Export to PDF 🔍 Check Access 🔄 Refresh 🗨️ Open Yammer

👤 Collaborate ✕ Close (EntityDisplayNa... 🔄 Process ▾ 📄 Connect sequence

✕ Disconnect sequence 📄 Sequences ▾ 🎮 Launch playbook 📄 To Opportunity

🔗 To Case 📄 Add to Queue 📄 Queue Item Details 👤 Assign 📄 View Hierarchy

📄 Share 🔒 Share Secured Fields ✉️ Email a Link ★ Follow ★ Unfollow ★ Unfollow

🔄 Flow ▾ 🔄 Flow ▾ 📄 Word Templates ▾ 📄 Run Report ▾

### Command

Approve

Use Icon ▾

Accept ▾

**Action** ⓘ

Run formula ▾

fx Open formula bar

**Visibility** ⓘ

Show on condition from formula ▾

fx Open formula bar

**Tooltip title**

# Clone



← Back | + New ▾ | Duplicate | Hide | Delete ...

Open component library | Save and Publish | Play

```
OnSelect = fx ( ), // also show success message
```

**Commands**

Search

+ New ▾

- ✓ Approve
- ✕ Return
- 🔄 Set Regarding
- 📄 Submit
- 📄 Submit
- 🔄 Recall
- 📄 Clone** ...
- ▶ View in Dynamics 365
- ✓ Mark Complete
- 📄 Save & Close
- + New
- + New
- 🔄 Summarize

✓ Approve ✕ Return 🔄 Set Regarding 📄 Submit 📄 Submit 🔄 Recall 📄 Clone

▶ View in Dynamics 365 ✓ Mark Complete 📄 Save & Close + New + New

🔄 Summarize 📄 Queue Item Details 📅 Book ↗ Save & Route 🗑 Delete

📄 Open Active Stage 📄 Export to PDF 🔍 Check Access 🔄 Refresh 🗨 Open Yammer

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✕ Disconnect sequence 📄 Sequences ▾ 📄 Launch playbook 📄 To Opportunity

🔧 To Case 📄 Add to Queue 📄 Queue Item Details 🔄 Assign 📄 View Hierarchy

📄 Share 📄 Share Secured Fields 📄 Email a Link ☆ Follow Unfollow ☆ Unfollow

🔄 Flow ▾ 🔄 Flow ▾ 📄 Word Templates ▾ 📄 Run Report ▾

**Command**

Clone

Use Icon ▾

Clone ▾

**Action** ⓘ

Run formula ▾

fx Open formula bar

**Visibility** ⓘ

Show ▾

**Tooltip title**

**Tooltip description**



# Modern Commanding

## Best Practices + Tips:

- Consider behavior after action is taken – both success and failure
- Handle visibility thoughtfully
- Consider duplicating the commands from forms to views

## Gotchas:

- Limited Power Fx functions
- Power Fx only supported in Dataverse
- In the correct Command Bar

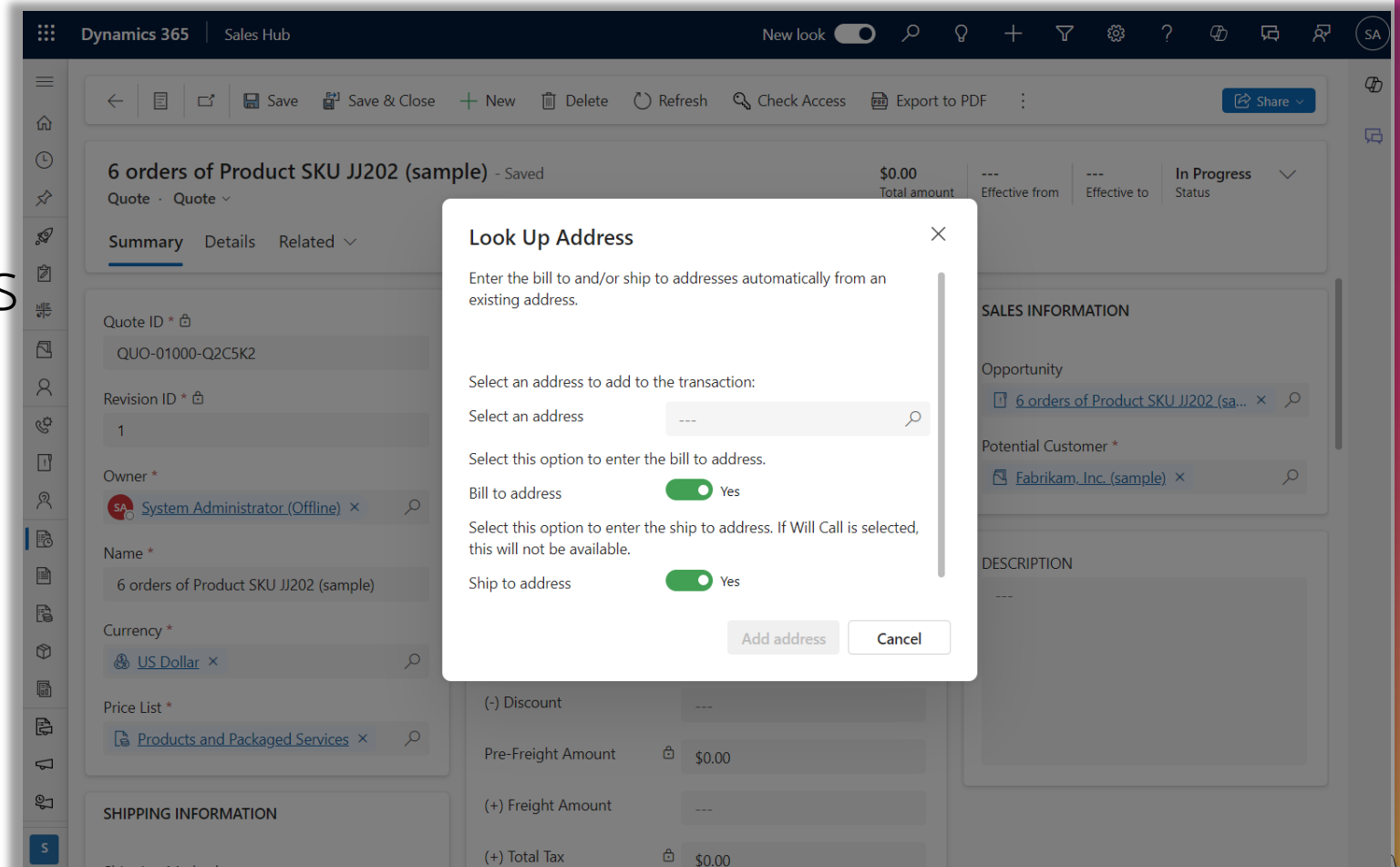


# Bringing it Together Low-Code Dialogs



# Dialogs Intro

- Pop-up windows requesting user input
- Often triggered by button click and prompts user to take action
- Focuses user on just a few fields
- Used commonly by Microsoft in Dynamics 365 applications



# Dialogs Intro

- Pop-up windows requesting user input
- Often triggered by button click and prompts user to take action
- Focuses user on just a few fields
- Used commonly by Microsoft in Dynamics 365 applications

The screenshot displays the Dynamics 365 Sales Hub interface for a lead named Lidman Anna (sample). The top navigation bar includes 'Dynamics 365 | Sales Hub' and various utility icons. The main content area shows the lead record with a 'Lead to Opportunity Sales' status and a 'Qualify (34 D)' stage. The 'Up next' section features a 'Manage your activities' card with 'Connect sequence' and 'Create activity' buttons. The 'Timeline' section shows a recent auto-post. The right sidebar contains 'Stakeholders' and 'Competitors' sections, both showing 'No data available.'



# Split Expense Scenario

Dynamics 365 | Field Service New look

← ↻ Save Save & Close Share

**Simon Raley - Hotel** - Saved  
Field Service Expense

System Administrator  
Owner

General Related

Expense Amount	\$250.00
Expense Date	2/28/2024
Bookable Resource	Simon Raley
Work Order	00007
Memo	Hotel expense for the week of 2/26 - 3/1

- Field service environment tracking expenses against work orders
- Sometimes expenses must be split between two work orders
- Portion of one expense is to be moved into a new expense and related to another work order
- User to trigger dialog window:
  - Enter dollar amount for new work order and select new work order
  - New expense to be created with entered amount
  - Original expense to be decremented by the same amount
  - Related attachments to be copied



# Traditional Approach

- A developer is needed to write code which can include a combination JavaScript, HTML and C# Plugins
- Lacking the same look and feel as the modern UI
- Can be costly with time and effort
- Requires working with an API directly

```
1 <!DOCTYPE html>
2 <html lang="en">
3 <head>
4   <meta charset="UTF-8">
5   <meta name="viewport" content="width=device-width, initial-scale=1.0">
6   <title>Old Style Dialogs in Dynamics 365</title>
7   <style>
8     .dialog-box {
9       background-color: #f8f8f8;
10      border: 2px solid #ccc;
11      padding: 20px;
12      width: 300px;
13      position: absolute;
14      top: 50%;
15      left: 50%;
16      transform: translate(-50%, -50%);
17      box-shadow: 0 0 15px rgba(0,0,0,0.2);
18      text-align: center;
19    }
20    .dialog-button {
21      margin-top: 20px;
22      padding: 10px 20px;
23      background-color: #4CAF50;
24      color: white;
25      border: none;
26      cursor: pointer;
27    }
28    .dialog-button:hover {
29      background-color: #45a049;
30    }
31    input[type="text"] {
32      padding: 8px;
33      width: 80%;
34      margin-top: 10px;
35    }
36  </style>
37 </head>
38 <body>
39   <div class="dialog-box" id="dialogBox">
40     <h2>Enter Your Name</h2>
41     <input type="text" id="userName" placeholder="Your Name Here">
42     <button class="dialog-button" onclick="submitName()">Submit</button>
43   </div>
44
```



# The Low Code Dialog Solution

Bringing it all together



## RESPONSIVE CUSTOM PAGE

- Modern controls
- Responsive design
- Buttons to cancel or take action
- Powerful expressions to create/update Dataverse records
- Validation of user input
- Error handling



## MODERN COMMAND

- New command designer
- Re-usable JavaScript function to open the custom page



# SEE IT IN ACTION!





# Modern Command Opens Custom Page



# JavaScript openCustomPageAsDialog

```
1 function openCustomPageAsDialog(itemIds, primaryControl, selectedControl, entityName, title, name, width, height)
2 /* parameters in command bar button:
3 Parameter 1: PrimaryItemIds,
4 Parameter 2: PrimaryControl,
5 Parameter 3: SelectedControl,
6 Parameter 4: <string> entityName = logical name of table where command bar button is placed,
7 Parameter 5: <string> title = text to display in header of custom page dialog,
8 Parameter 6: <string> name = logical name of custom page,
9 Parameter 7: <number> width of modal dialog, (e.g. 750)
10 Parameter 8: <number> height of modal dialog (e.g. 500)
11 */
12 {
13
14     var guid = itemIds[0].replace(/{{}}/g, ""); //context._data.entity._entityId.guid;
15
16     // Centered Dialog
17     var pageInput = {
18         pageType: "custom",
19         name: name,
20         entityName: entityName,
21         recordId: guid,
22     };
23     var navigationOptions = {
24         target: 2,
25         position: 1,
26         width: width,           //{value: width, unit:"%"},
27         height: height,       //{value: height, unit:"%"},
28         title: title
29     };
30     Xrm.Navigation.navigateTo(pageInput, navigationOptions)
31     .then(
32         function () {
33             // Called when the dialog closes
34         }
35     ).catch(
36         function (error) {
37             // Handle error
38         }
39     );
40 }
41
```



- Pages
- Data
- Automation

**Pages** + New

Service 🔍

Supporting Tables

**Accounts view** ...

- Accounts form
- Time Entries view
- Time Entries form
- Time Off Requests view
- Time Off Requests form
- Video Links view**
- Video Links form
- Expenses view
- Expenses form
- Scheduling
- Work Orders view

**Dynamics 365** | Field Service 🔍 ⋮ SA

← **My Active Accounts** ▾ ⋮ Share ▾

Account Name ↑ ▾	Main
A Datum Fabrication	30!
A Datum Integration	51!
A. Datum Corporation (sample)	55!
Adventure Works	81!
Adventure Works (sample)	55!
Adventure Works Electronics	30!
Adventure Works Engineerina	91!

1 - 50 of 82      ⏪ ⏩ Page 1

Responsive (471 x 483) ▾      — 100% 🔍

**Accounts** >

Views   Charts   Settings

In this app

+ New view

- Accounts: Influenced D... Public View
- Accounts: No Campaig... Public View
- Accounts: No Orders in ... Public View
- Accounts: Responded t... Public View
- Active Accounts Public View
- All Accounts Public View
- Inactive Accounts Public View

Include all views in the app  Off

# Custom Page Design




Fill ▾ = fx `RGBA(255, 255, 255, 1)` ▾

### Tree view

Search

- > App
  - Screen1
    - spnSaving
    - > conMain

 How much would you like to split into a new expense? The original expense will be decremented by the entered amount.


New Amount	<input type="text" value="Enter the amount to split"/>
Remaining Amount	69.00
New Work Order	Find items ▾

Screen1 ————— + 70 % ↗

### SCREEN ?

## Screen1

**Properties** Advanced

Fill 

Background image  ▾

Image position  ▾

# Using the Dialog



← Focused view Show Chart + New Delete Refresh Visualize this view Share

Active Expenses Edit columns Edit filters Filter by keyword

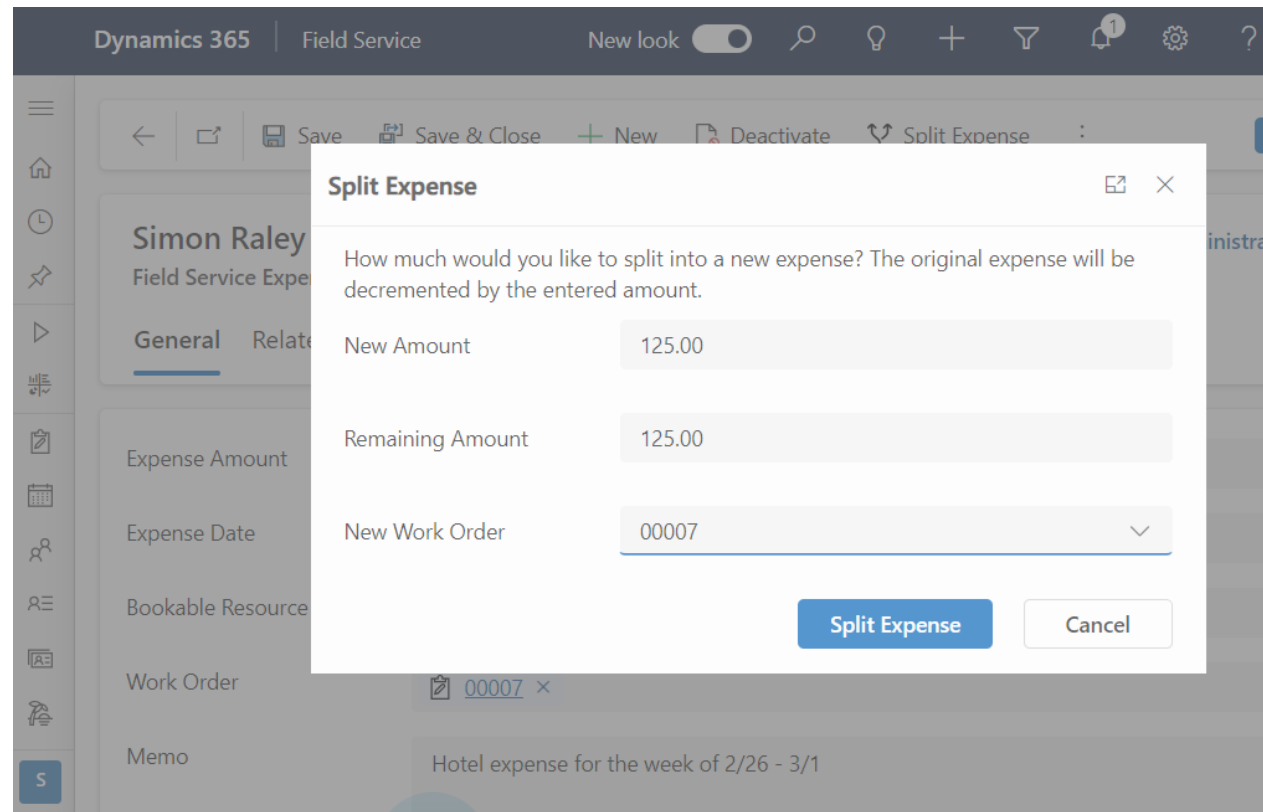
<input type="checkbox"/> Name	Expense Amount	Expense Date	Work Order
<input type="checkbox"/> Simon Raley - Hotel	\$800.00	2/28/2024	00006

Rows: 1



# Best Practices & Suggestions

- Keep it simple for the end user
- Use modern controls for a seamless look and feel
- Handle errors proactively on the page
- Return errors back to user



The screenshot shows the Dynamics 365 Field Service interface. A 'Split Expense' dialog box is open, asking 'How much would you like to split into a new expense? The original expense will be decremented by the entered amount.' The dialog contains three input fields: 'New Amount' with the value 125.00, 'Remaining Amount' with the value 125.00, and 'New Work Order' with a dropdown menu showing '00007'. There are 'Split Expense' and 'Cancel' buttons at the bottom of the dialog. The background shows a record for 'Simon Raley' with fields for 'Expense Amount', 'Expense Date', 'Bookable Resource', 'Work Order', and 'Memo'.

- Consider containers for a responsive app
- Include the page in your app
- Consider what kind of navigation upon a successful transaction
- "Low code" does not mean "low effort"





# What will you build next?

Go out and give it  
a shot!



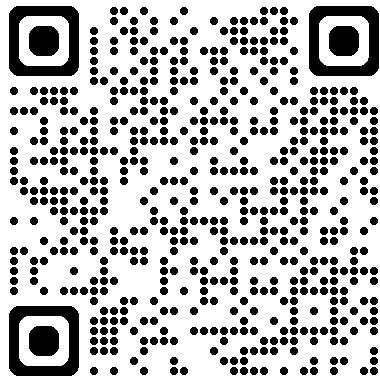
## Questions?





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**Let's Connect!**



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