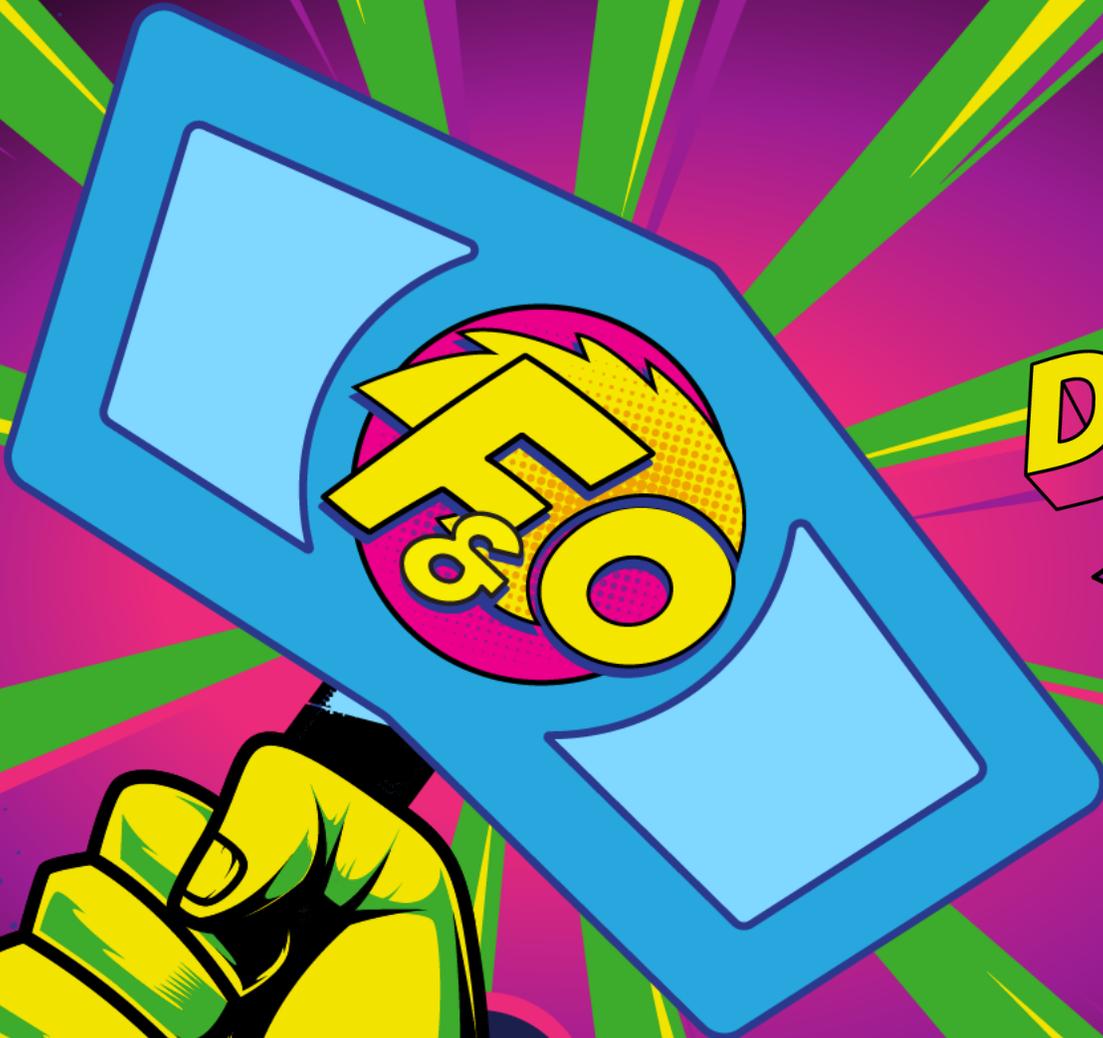


A DYNAMICSCON PRESENTATION



POWERED BY  DUG

DYNAMICSCON VIRTUAL MARCH 2023

FINANCE &
OPERATIONS

DYNAMICSCON.COM

Using Power Apps, Teams and Dynamics 365 Finance



Meet your presenter

Dan Edwards, CPA – Managing Director @ Crowe LLP

Over 30 years implementing and supporting technology solutions

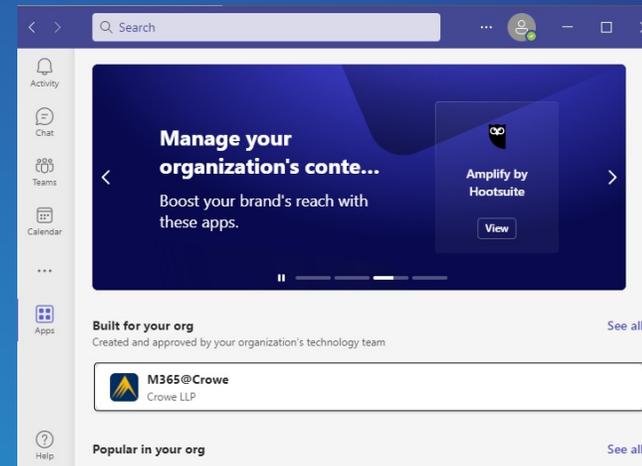
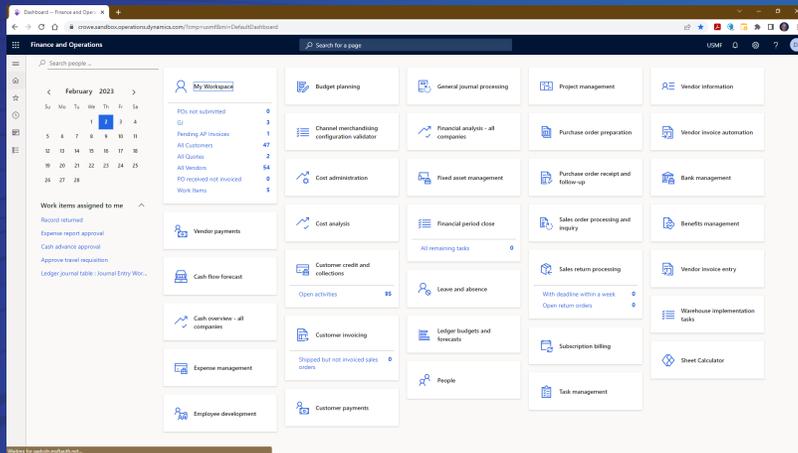
Specializes in financial and operational reporting solutions

Experienced with many ERP, Reporting and BI tools



Objectives

- Many of us use Teams all day, so wouldn't it be great to access your Dynamics 365 Finance and Supply Chain data and tasks in one central location?



Agenda

- Key setups to think about
- Embed D365 Finance in Teams
- Use Teams for approvals
- Update team in Teams with critical info/tasks
- Use a Canvas App in Teams
- Use a Model-Driven App in Teams

Key setups to think about



Working with Dataverse



Dataverse



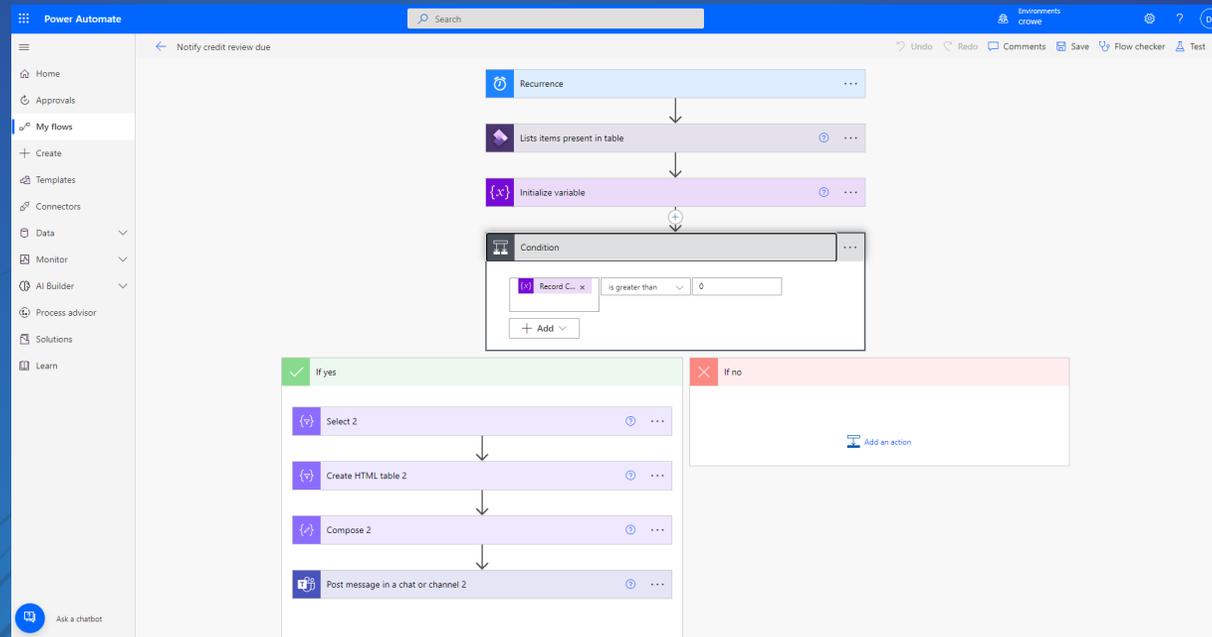
D365 Finance &
Supply Chain

	Dual Write	Virtual Entities
Performance	Near real-time	Real-time CRUD
Method	Synchronous	NA
Direction	Bi-directional	NA
Data handling	Data is duplicated	Data remains in source
Logic	Auto business logic execution	Odata Actions
Change behavior	Change tracking	No change tracking

Power Automate



a low-code tool that allows creating automated workflows between application and services to synchronize files, get notifications, collect data and more. These processes can be triggered by events or manually



Embed D365 Finance and Supply Chain in Teams



Scenario

- Our credit team works through Teams to manage the collection process with our clients and want easy access to D365 information

Dynamics 365 inside of Teams

The screenshot displays the Microsoft Teams interface with Dynamics 365 content. The left sidebar shows navigation options: Activity, Chat, Teams, Calendar, Calls, Check Req..., Approvals, and Apps. The main content area is titled "General" and "Finance and Operations". It features a search bar, a "Meet" button, and a "New customer" button. The primary heading is "Manage customer credit and collections". Below this, there are filters for "Company" (USMF), "Customer account", and "Currency" (Accounting currency). A "Summary" section contains ten blue tiles with metrics: Open activities (36), Open cases (1), Customers over credit limit (12), Payment journals not posted (0), Collection letters not printed (8), Collection letters not posted (8), Interest notes not printed (0), Interest notes not posted (0), Sales orders on hold (3), Customer payment predictions (33), and Transaction payment predictions (115). A "Balances" section at the bottom includes filters for "Pool" (Balance) and "Aging period definition" (30_60_90_180).

Activity

Chat

Teams

Calendar

Calls

Check Req...

Approvals

Apps

Help

Join or create a team

Search

CM General Posts Collection Workspace 2 more +

Meet

Finance and Operations USMF

+ New customer Options

My view

Manage customer credit and collections

My work Analytics - all companies

Company Customer account Currency

USMF Accounting currency

Summary

36 Open activities	1 Open cases	12 Customers over credit limit	0 Payment journals not posted	8 Collection letters not printed	8 Collection letters not posted
0 Interest notes not printed	0 Interest notes not posted	3 Sales orders on hold	33 Customer payment predictions	115 Transaction payment predictions	

Balances

Pool Aging period definition

Balance 30_60_90_180

How to Embed D365

Add a tab ×

Turn your favorite apps and files into tabs at the top of the channel Q

[More apps](#)

Recent ▾

Tabs for your team

- Lists
- Tasks by Planner an...
- OneNote
- Wiki
- Stream
- Whiteboard
- Document Library
- Excel
- Forms
- PDF
- Power BI
- PowerPoint
- SharePoint
- Viva Engage
- Website**
- Word

More apps

- Azure DevOps
- Channel calendar

⚙️ Manage apps

Website

Tab name
Customer Credit & Collections

URL*
 ✓

*Make sure you're only linking to sites that start with 'https://' and contain trustworthy web content. That way, you and your team can stay secure.

Post to the channel about this tab

Back Save

Use Dynamics URL for the workspace + '&limitednav=true'

Demonstration



Use Teams for Dynamics 365 Finance Approvals



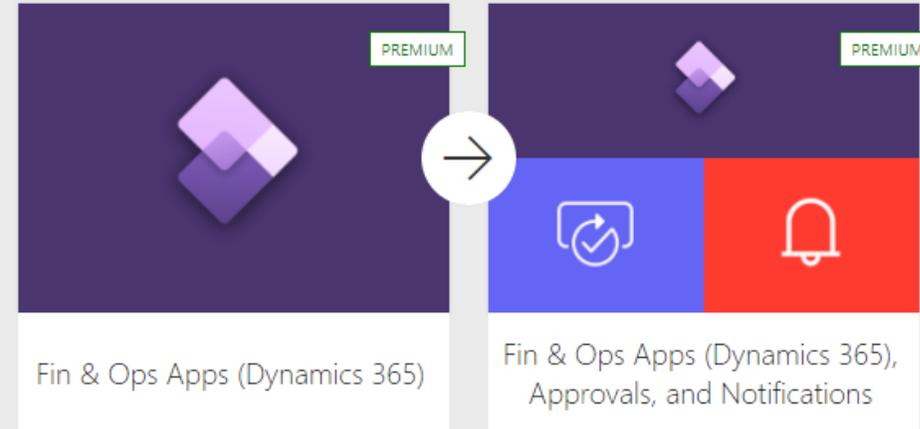
Scenario

- Our company uses Dynamics 365 Finance & Supply Chain workflow for Purchase Order approvals, and users want an easy way to approve the POs from Teams.

Complete D365 workflow work items

- Out of the box templates available for using Power Automate with Dynamics 365 Finance & Operations workflow
- Simply update the template with your instance of D365, which workflow you are automating and which legal entity
- Approvals will now appear in Microsoft Teams with link back to the record

Complete Dynamics 365 for Finance and Operations workflow work items (PU29)



When a Business Event occurs in Dynamics 365 for Finance and Operations in response to the creation of a workflow workitem, check if the workitem contains a valid set of information so it is ready for completion. If the workitem is ready for completion, then request a response from the assigned person and complete the workitem with that response. If the workitem is not ready for completion, then send a notification to the assigned person to let them know there is a workitem that needs their attention.

When a Business Event occurs

* Instance: [redacted].dynamics.com

* Category: Workflow workitem

* Business event: Purchase order workflow (000063) - Approve purchase order

Legal entity: USMF

Parse JSON

* Content: Body x

* Schema

```
{
  "type": "object",
  "properties": {
    "BusinessEventId": {
      "type": "string"
    },
    "ContextRecId": {
      "type": "integer"
    },
    "ControlNumber": {
```

Generate from sample

Validate Workitem

* Instance: [redacted].dynamics.com

* Action: WorkflowWorkItems-validate

WorkflowWorkItemInstancelid

WorkflowWork... x

Update the template with the Instance of D365. This is in multiple steps

The Business Event is the Workflow you are using with Power Automate



- Approvals
- Adobe Sign
- DocuSign

- Approvals**
- Request title
- Action needed for: Please Appro...
 - Action needed for: Please Appro...
 - Please approve check request
 - Journal Entry Approval
 - Journal Entry Approval
 - Please approve check request
 - Please approve check request
 - Please approve check request
 - Journal Entry Approval
 - Journal Entry Approval

Approvals
Approval request details

Requested

Action needed for: Please Approve PO 00000326:Purchase order: 00000326, BE Group

Workflow ID: 000975
Instructions: Please Approve PO

PO # 00000326

Vendor Account: US-116
Last comment:

Attachments

Purchase order: 00000326, BE...
<https://...dy...>

Comments

Add your comments here

More actions ▾

Choose your response ▾

- Approve
- Reject
- RequestChange
- Delegate

Submit

Filter crowe ▾

	Sent by	Sent to	
9:11 AM	Dan Jump	Dan Jump	...
7:17 AM	Dan Jump	Dan Jump	...
2:40:23 PM	Dan Jump	Charlie Carson	...
2:12:50 PM	Dan Jump	Dan Jump	...
0:48:59 AM	Dan Jump	Dan Jump	...
3:30:30 AM	Dan Jump	Charlie Carson	...
28:21 AM	Dan Jump	Charlie Carson	...
24:11 AM	Dan Jump	Charlie Carson	...
44:35 AM	Dan Jump	Dan Jump	...
59:15 AM	Dan Jump	Dan Jump	...
10:50 PM	Dan Jump	Dan Jump	...
52:46 PM	Dan Jump	Dan Jump	...
48:09 PM	Dan Jump	Dan Jump	...
35:36 PM	Dan Jump	Dan Jump	...
31:34 PM	Dan Jump	Dan Jump	...
2:28:48 PM	Dan Jump	Dan Jump	...

Demonstration



Keep team informed in Teams



Scenario

- Our credit team routinely reviews our customers' credit limit. They would like to get a list of customers scheduled for review on a weekly basis.

Setup on Customer Card

Finance and Operations

Search for a page

USMF

Customer Sell Invoice Collect Projects Service Market Commerce General Credit management Recurring contract billing Options

All customers | Standard view

US-001 : Contoso Retail San Diego

General 30 | -- | v

Addresses v

Contact information v

Miscellaneous details 01 | Always | v

Sales demographics 3100 | 20 | 10 | -- | 10 | USD | v

Credit and collections Excellent | No | ^

GENERAL	TOTAL CREDIT LIMIT	CREDIT REVIEW	STATUS	COLLECTIONS
Credit rating Excellent	Credit limit 150,000.00	Last review date 1/31/2018	Account status Open	Invoicing and delivery on hold No
Mandatory credit limit <input type="radio"/> No	Credit limit in customer's currency (US... 150,000.00	Next scheduled review date 9/16/2022	Account status reason	Collections contact
Unlimited credit limit <input type="radio"/> No	Insurance and guarantees 0.00	ELIGIBLE CREDIT LIMIT	With collection agency <input type="radio"/> No	Default write-off reason
Exclude from credit management <input type="radio"/> No	Total credit limit 150,000.00	Eligible credit limit 0.00	Title held <input type="radio"/> No	Exclude interest charges <input type="radio"/> No
Credit management group	Credit limit expiration date 12/31/2023	Eligible credit limit currency USD	RISK	Exclude collection fees <input type="radio"/> No
	Credit limit change date 4/13/2022	Eligible credit limit change date	Year business established 1/1/2009	
	Customer credit group Contoso		Customer since 1/1/2010	
			NOTES	
			Note	

Related information

Primary address ^

456 Peach Road
San Diego, CA 92114
USA

Recent activity v

Relationships v

Statistics ^

Highest balance 0.00

Average invoice 0.00

Balance 0.00

Balance in reporting currency 0.00

Open orders 0.00

Released not invoiced 0.00

Delivered not invoiced 0.00

Refresh

Credit statistics ^

Highest balance date

DSO (12 Months)

DSO (6 Months)

Average payment days 0

Avg balance (12 mths) 0.00

The next scheduled review is entered on the customer card



Use Power Automate to share data

We will use a scheduled flow to run every Monday

Key info for query syntax

Eq is equals
Gt is greater than
Lt is less than

Recurrence

Interval: 1 Frequency: Week

Preview: Runs on Monday every week

Show advanced options

Lists items present in table

Instance: crowe.sandbox.operations.dynamics.com

Entity name: CustomersV3

Aggregation transformation: A sequence of OData aggregation transformations

Filter Query: CredManNextSchedReviewDate gt `utcNow()` and CredManNextSchedReviewDate lt `addDays(...)`

Order By: An ODATA orderBy query for specifying the order of entries.

Top Count: Total number of entries to retrieve (default = all).

Skip Count: The number of entries to skip (default = 0).

Select Query: Specific fields to retrieve from entries (default = all).

Cross Company: Query across companies (default = no).

Hide advanced options

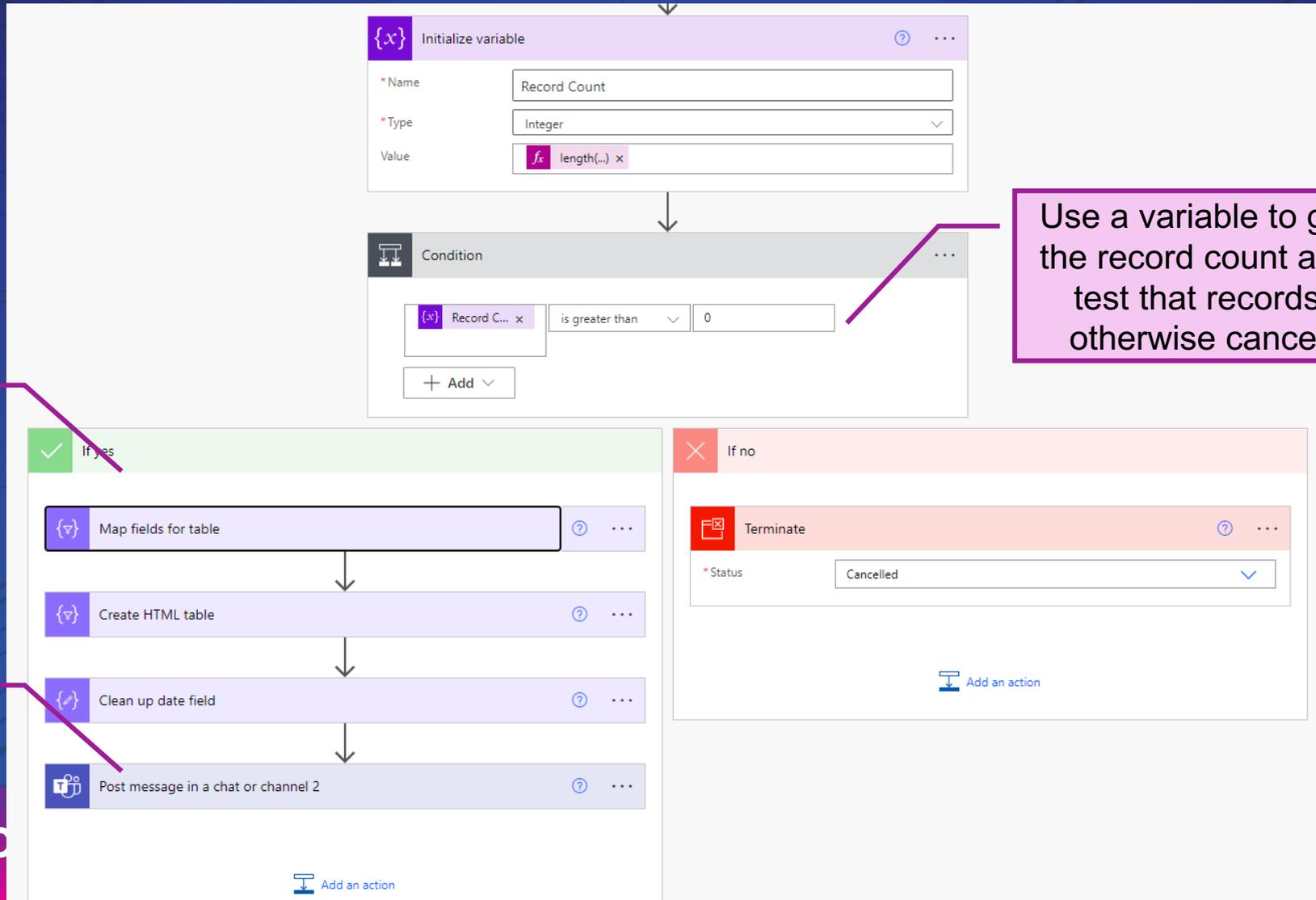
Initialize variable

Condition

To get the data from D365 use the F&O connector with CustomersV3 entity

Filter the customers based on the Next Scheduled Review Date

Use Power Automate to share data

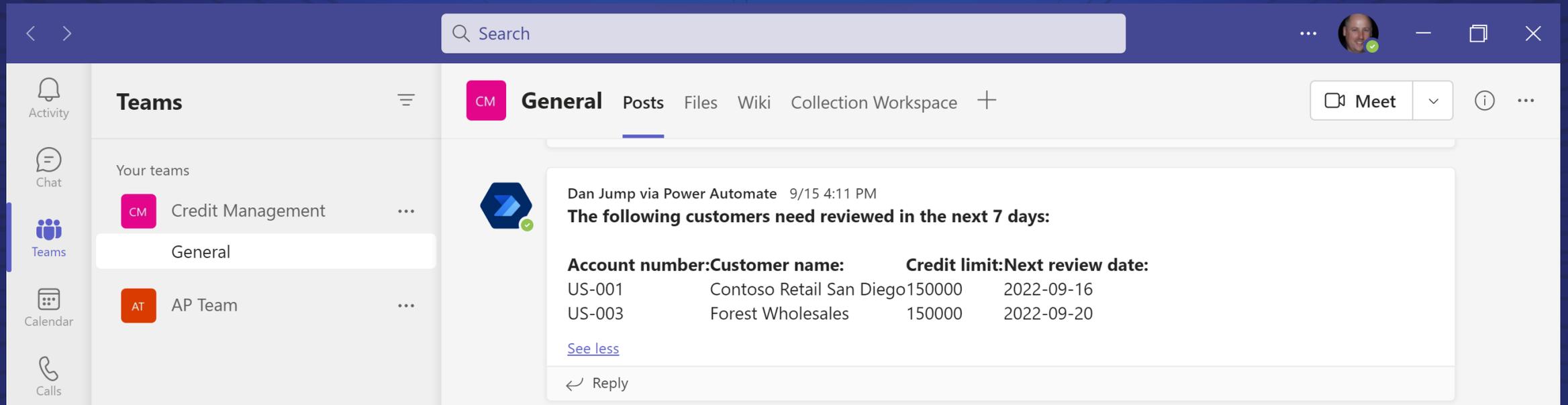


Prepare the data for Teams

Post data to Teams

Use a variable to get the record count and test that records otherwise cancel

Info displayed in Team



The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, and Calls. The 'Teams' section is expanded, showing 'Your teams' with 'Credit Management' and 'AP Team'. The main area shows a 'General' channel with a message from 'Dan Jump via Power Automate' dated 9/15 4:11 PM. The message content is as follows:

The following customers need reviewed in the next 7 days:

Account number:	Customer name:	Credit limit:	Next review date:
US-001	Contoso Retail San Diego	150000	2022-09-16
US-003	Forest Wholesales	150000	2022-09-20

Below the table is a 'See less' link and a 'Reply' button.

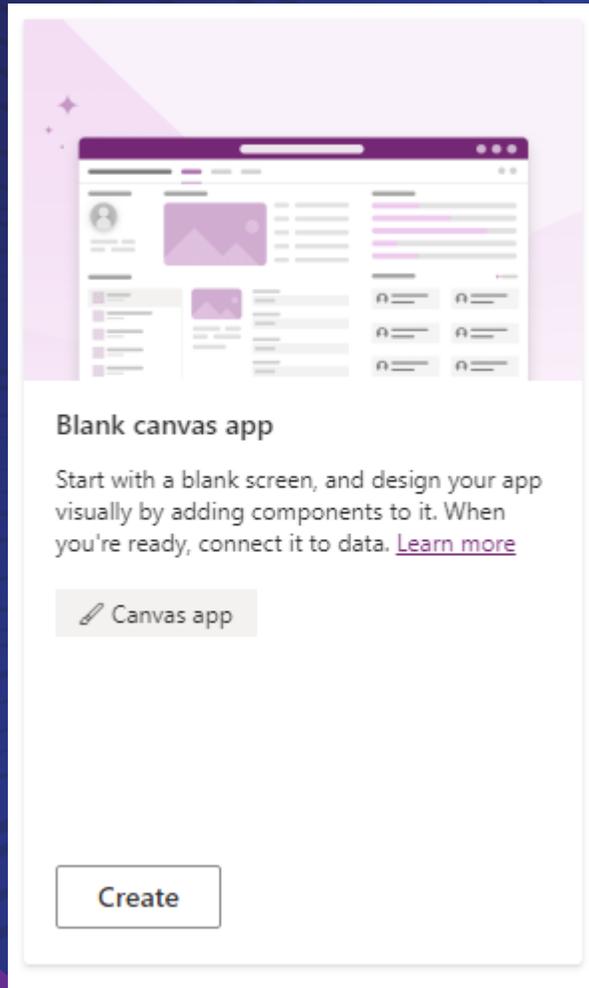
Demonstration



Using Canvas App and Teams with D365



Canvas Apps



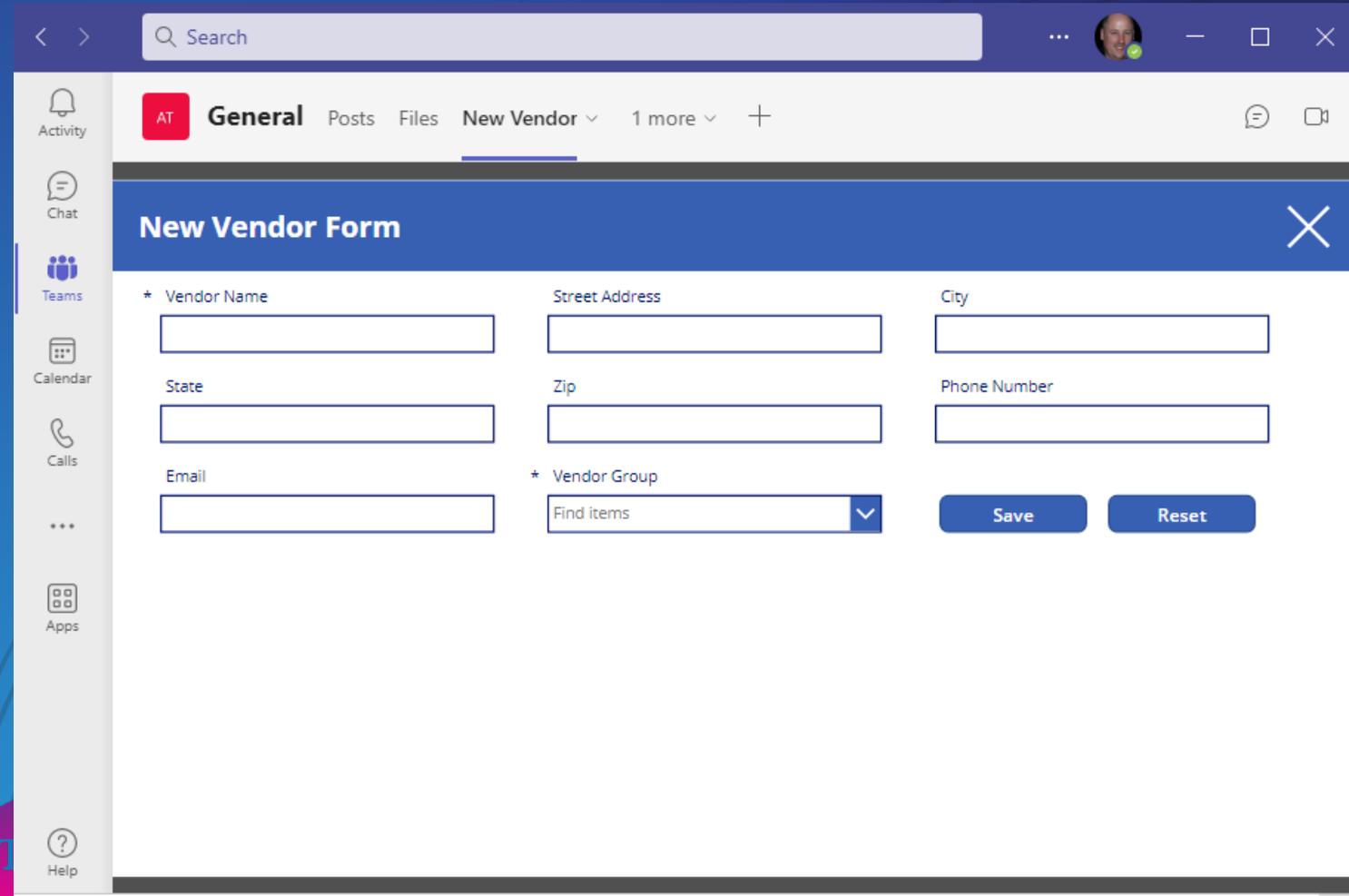
- Canvas Apps are built in Power Apps using drag and drop onto a blank canvas. Canvas app is very easy to be visualized on a tablet or mobile app and it can be connected to many data sources including Dataverse, SharePoint and D365.

Scenario

- The purchasing team gathers the information for new vendors using a simple form in Teams and the vendors should be approved prior to entry into Dynamics 365

Using Canvas App from PowerApps

- Create a simple Canvas App based on a SharePoint list and display it in Teams

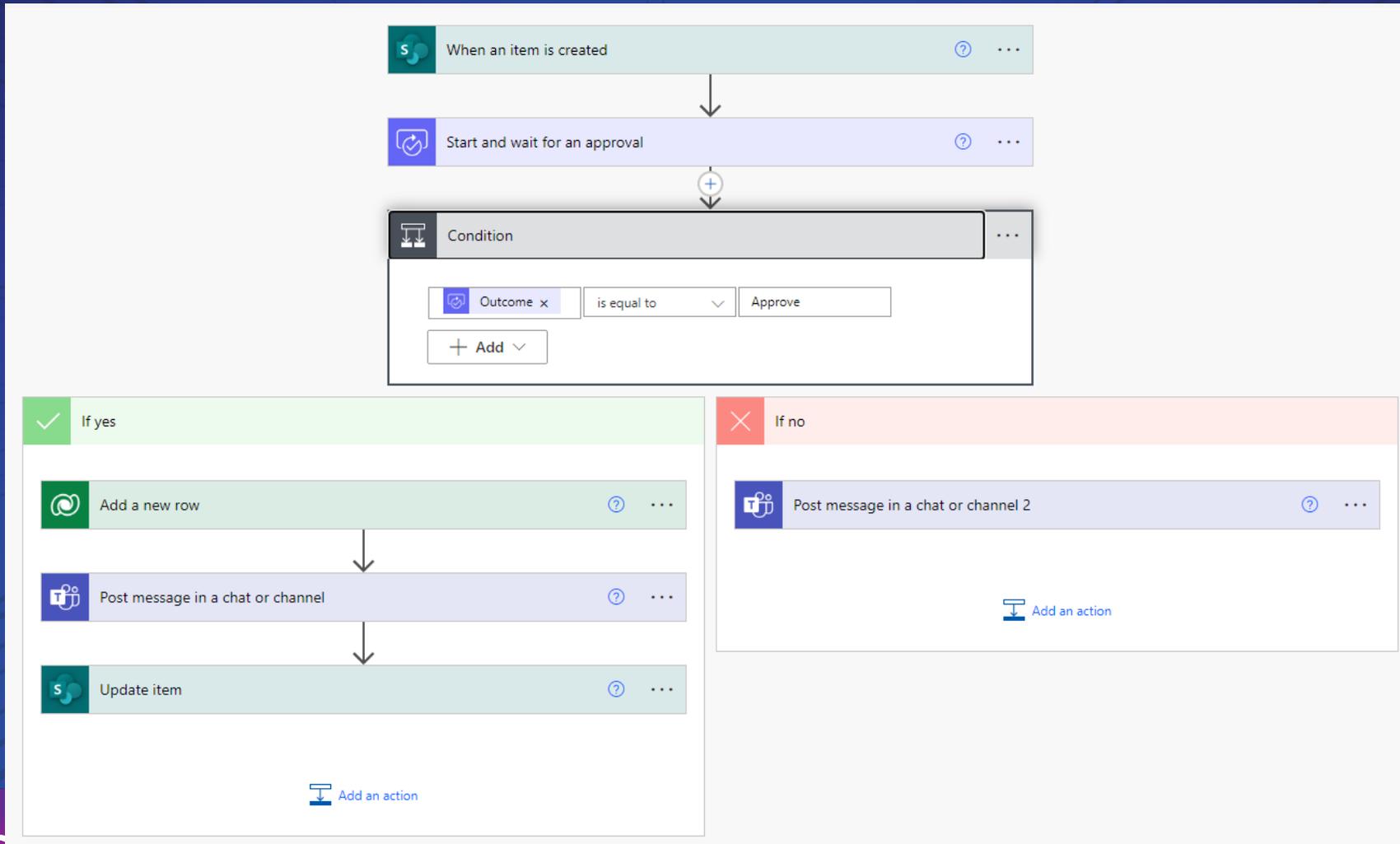


The screenshot shows a Microsoft Teams chat window. The chat title is 'General' with a red 'AT' icon. The chat content displays a Canvas App titled 'New Vendor Form'. The app has a blue header with a close button (X). The form contains the following fields:

- * Vendor Name (text input)
- Street Address (text input)
- City (text input)
- State (text input)
- Zip (text input)
- Phone Number (text input)
- Email (text input)
- * Vendor Group (dropdown menu with 'Find items' selected)

At the bottom right of the form are two buttons: 'Save' and 'Reset'.

Use Power Automate to process form



Search

Activity

Feed

- Dan Jump sent you a request. Please approve vendor Approvals 1:40 PM
- Final status: Rejected. Please approve vendor Approvals 9:16 AM
- Dan Jump sent you a request. Please approve vendor Approvals 9:16 AM
- Final status: Rejected. Please approve vendor Approvals 9:15 AM
- Dan Jump sent you a request. Please approve vendor Approvals 9:14 AM
- Final status: Rejected. Please approve vendor Approvals 9:11 AM
- Dan Jump sent you a request. Please approve vendor Approvals 9:10 AM
- Final status: Approved. Please approve vendor Approvals 9:09 AM

Chat

Teams

Calendar

Calls

Check Req...

Approvals

...

Apps

Help

Approvals Received Sent

+ New approval request

Approvals

Approval request details

Requested

Please approve vendor

Vendor Information:

Field	Value
Vendor Name:	QE Incorporated
Vendor Group:	20
Address:	3896 Rays Road
City, St. Zip:	Laguna, CA 92804

Comments

Add your comments here

More actions

Reject

Approve

Create or manage templates

Vendor setup in Dynamics 365

Finance and Operations

Search for a page

USMF

Edit + New Delete Vendor Procurement Invoice General Options

All vendors | Standard view

US-299 : QE Incorporated

20 | Not Active

General

Change party association

IDENTIFICATION

Vendor account **US-299**

Type

Organization

Payment priority

Name

QE Incorporated

Search name

QE Incorporated

Group

20

ORGANIZATION DETAILS

Number of employees

0

Organization number

ABC code

None

DUNS number

OTHER INFORMATION

Address books

Known as

Phonetic name

Language

en-us

VENDOR COLLABORATION

Collaboration activation

Not Active

Addresses

+ Add Edit Map More options

Name or description	Address	Purpose	Primary
	3892 Rays Road CA 92804 USA	Business	Yes

This example uses a number sequence to assign Vendor account

Related information

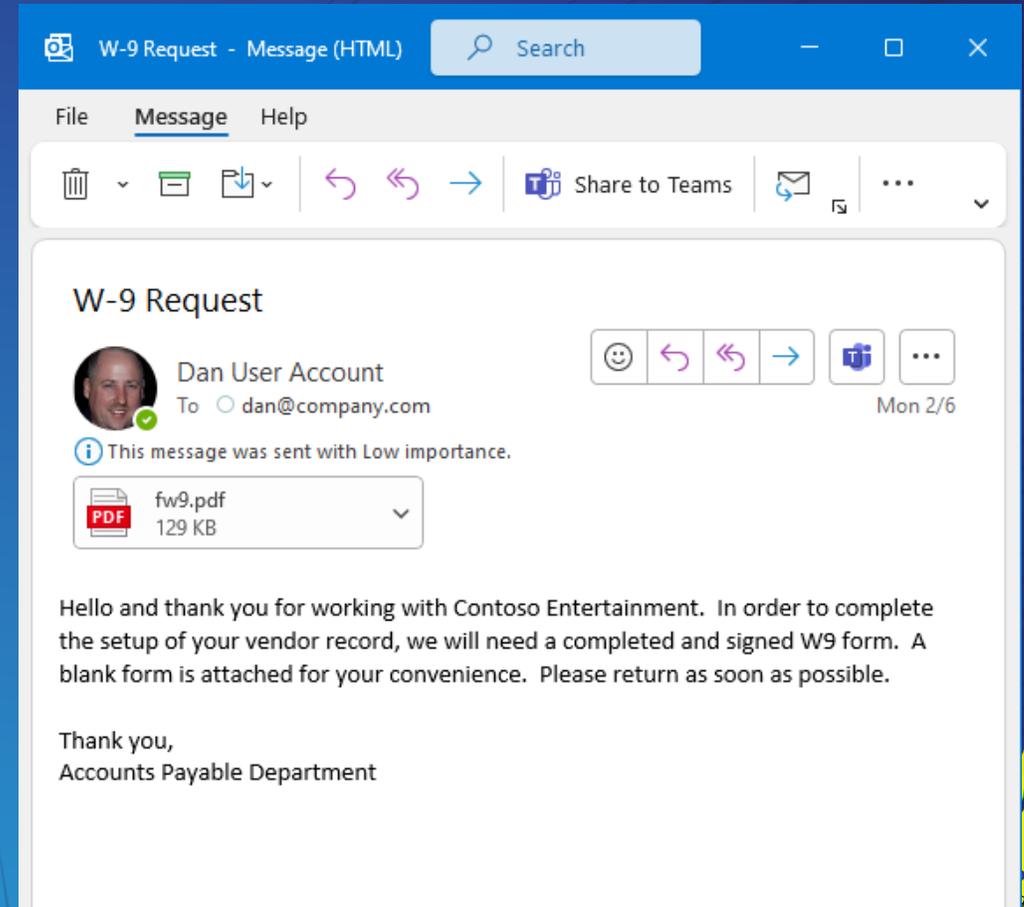
Send reply to the originator

The screenshot shows the Microsoft Teams chat interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, Check Req..., and Approvals. The main chat area is titled "Power Automate Chat" and shows a message from "Dan Jump via Power Automate" at 1:57 PM. The message text is: "Your vendor request for John Smith has been rejected by Dan Jump. The comments are: This company has issues - not interested". Below this is another message: "Your vendor request for **Bonnie Company** has been approved and the account has been created in Dynamics 365. The vendor account number is **US-301**."

The screenshot shows a Microsoft Word message window titled "Vendor has been added to D365 - Message (HTML)". The message content is: "Vendor has been added to D365". Below the message is a rich text editor toolbar with icons for Undo, Respond, Share to Teams, Quick Steps, Move, Tags, Editing, Immersive, Translate, and Zoom. The "Respond" icon is highlighted.

The screenshot shows a Microsoft Word message window titled "Vendor has been added to D365". The message content is: "Vendor has been added to D365". Below the message is a rich text editor toolbar with icons for Undo, Respond, Share to Teams, Quick Steps, Move, Tags, Editing, Immersive, Translate, and Zoom. The "Respond" icon is highlighted. Below the toolbar is a message from "Dan Jump" at 1:41 PM, addressed to "Dan Jump". The message text is: "Your request for QE Incorporated has been added to Dynamics 365. The new vendor number is US-300."

Send welcome email to Vendor



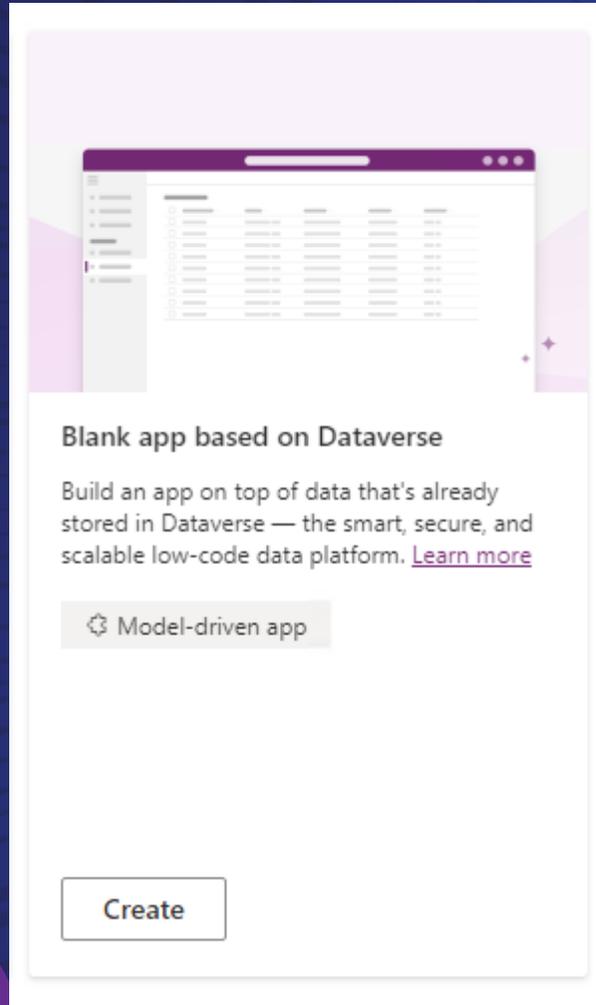
Demonstration



Use Model-Driven App to work with Teams with D365



Model-Driven Apps

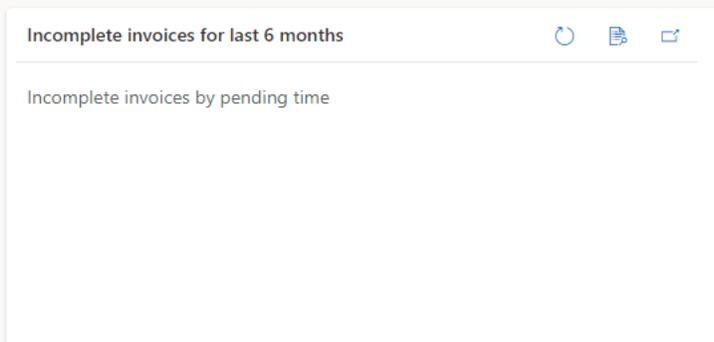
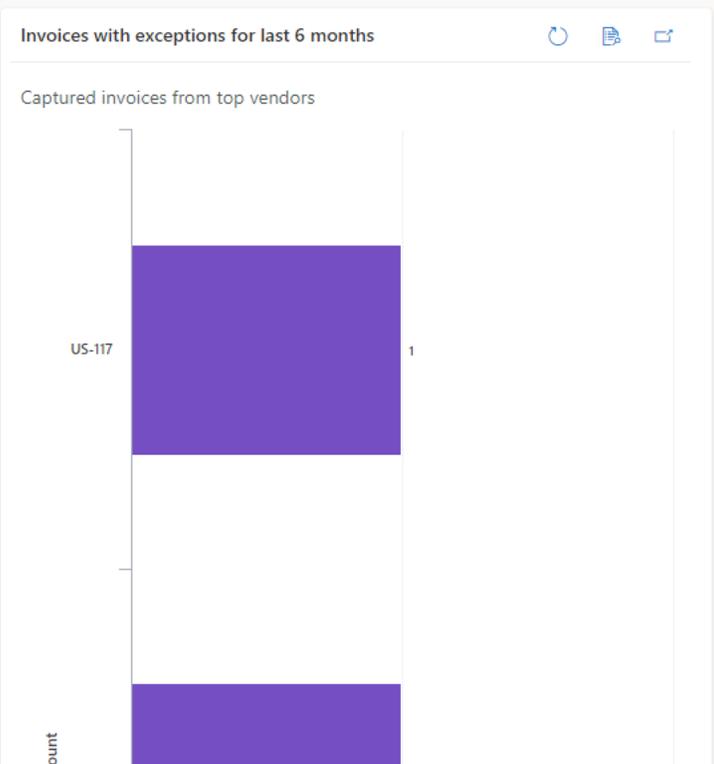
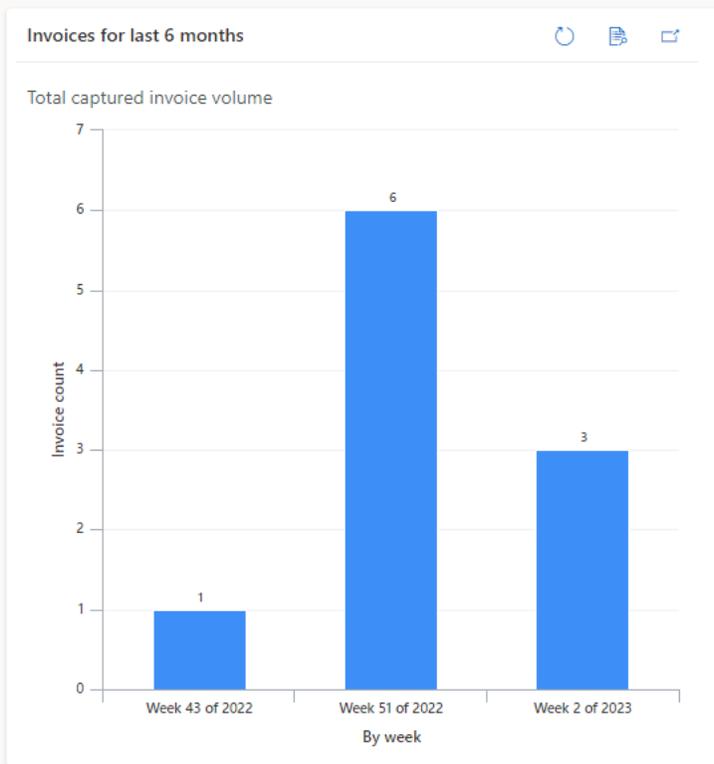
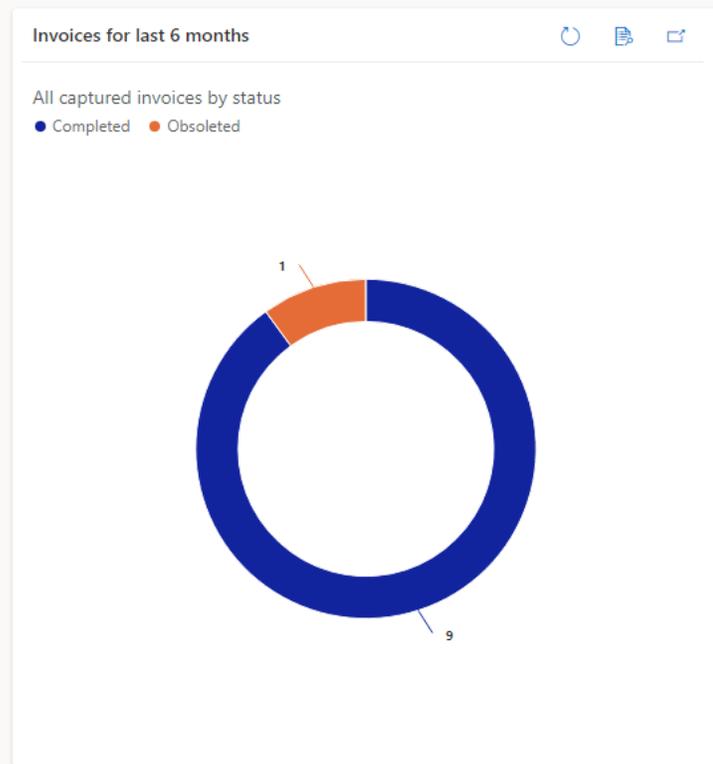


- A model-driven app is a reasonably quick application development solutions with drag-and-drop components like charts, dashboards, survey forms, etc. It is integrated with Dataverse as well as Power Automate and Power BI.

- Home
- Recent
- Pinned
- My work
 - Dashboard
 - Captured invoices
 - Received files

Save As New Clear Default Refresh All

Dashboard for last 6 months



Adding Model-Driven App to Teams

Add a tab ×

Turn your favorite apps and files into tabs at the top of the channel Search Q

[More apps](#)

Recent ▾

Tabs for your team

- Power Apps**
- Website
- Forms
- Dynamics 365
- Lists
- Tasks by Planner an...
- OneNote
- Wiki
- Stream
- Whiteboard
- Document Library
- Excel
- PDF
- Power BI
- PowerPoint
- SharePoint
- SharePoint Pages
- Visio
- Word

Power Apps About ×

Choose from existing apps Show All ⓘ

Search within this list... Model-driven apps ▾

- Dynamics 365 — custom
Crowe MCS Presales (default)
- Inventory Visibility
crowe
- Invoice capture
crowe
- Portal Management
crowe
- Project
crowe
- Project
CroweProjecto

[Or create an app in Power Apps](#) ↗

Post to the channel about this tab

Back Save

Scenario

- Many of our users need to submit check requests. We do not want to have all users in D365, and we would also like the requests to be approved prior to entry into D365.

Please approve check request - Message (HTML)

File Message Help

Share to Teams

Please approve check request

Microsoft Flow <maccount@microsoft.com>
To Dan Jump 10:39 AM

Approvals | Power Automate

Please approve check request

Requested by **Charlie Carson** <charlie@crowemcs.onmicrosoft.com>

Date Created Tuesday, September 20, 2022 10:39 AM
Link [Click here to view details](#)

Get the Power Automate app to receive push notifications and grant approvals from anywhere. [Learn more](#). This message was created by a flow in Power Automate. Do not reply. Microsoft Corporation 2020.

Approval go through Outlook and Teams

Approvals

Approval request details

Requested

Please approve check request

Attachments

[Click here to view details](#)
https://operations-crowe-1.crm.dyn...

Status: Requested

Pending response
Dan Jump

Requested by
Charlie Carson Just now

Comments

Add your comments here

 **Approvals**
Approval request details

Approved

Please approve check request

▼ **Attachments**

 [Click here to view details](https://operations-crowe-1.crm.dyn...)
https://operations-crowe-1.crm.dyn...

▼ **Final status: Approved**

 Approved by
Dan Jump 2m ago
This cost is acceptable

 Requested by
Charlie Carson 6m ago

Once approved the user will be informed through a Teams alert

Microsoft Dynamics 365 interface showing a 'Check Request' record in 'Sandbox' mode. The record title is 'Summit expense for supplies - Saved'. The process flow includes 'Enter Request' and 'Approval (< 1 Min)'. A 'Check Request Process' bar is active for 6 minutes. A pop-up window shows approval details: Approver (Dan Jump), Approval Status (Yes), Approval Comments (Costs are accepta...), and Journal Batch Number (01464). A 'Run Flow' button is visible in the pop-up.

Field	Value
Transaction Date	9/20/2022
Request Reason	* Summit expense for supplies
Amount	* \$120.00
Vendor	* US-111
Invoice Number	* 2389
Account	* 601200
Business Unit	001
Department	022

Field	Value
Approver	Dan Jump
Approval Status	* Yes
Approval Comments	* Costs are accepta...
Journal Batch Number	* 01464

The record is updated with the Journal information and approval notes

Finance and Operations Search for a page USMF

Save + New Delete Lines Open lines in Excel Validate Post Approval Inquiries Print Unlock Options

Invoice journal
Standard view

Show
Not posted Show user-created only

List General Setup Blocking Financial dimensions History

	Journal batch nu...	Name	Description	Posted	Posted on	Log	In ...	In use by	Modified by	Rejected by
	01464	Ckrequest	Summit expense for supplies	<input type="checkbox"/>		<input type="checkbox"/>			CHARLIE	

Finance and Operations Search for a page USMF

Save Post Post in batch Validate Period journal Functions Inquiries Print Options

Vendor invoice journal | 01464 : CKREQUEST
Standard view

List General Invoice Cash discount Fixed assets Remittance History 1099 Foreign trade

+ New Delete Settle transactions Financial dimensions Sales tax Functions Voucher View marked transactions Deferrals

	Date	Voucher	Deferred	Account type	Account	Account name	Invoice date	Invoice	Description	Debit	Credit	Total amount	Currency
	9/20/2022	APIN000119	<input type="checkbox"/>	Vendor	US-111	Contoso office supply	9/20/2022	2389	Summit expense f...		120.00	-120.00	USD

Information is posted directly into AP, and is ready for payment processing based on Vendor setup

Behind the scenes

Power Apps Environment: crowe

Tables > Check Request

Name	Primary column	Description
Check Request	Request Reason	
Type	Last modified	
Standard	2 months ago	

Check Request columns and data

Transaction D...	Request Reason * ↑	Amount * ↓	Submitted by *	Approved by *	Approved ↓	+29 more ↓
9/15/2022	New desk supplies	100	Dan	CHARLIE	Yes	
Enter or pick date	Enter text	Enter number	Select lookup	Select lookup	Select option	

Edit column (Previously called fields. [Learn more](#))

Display name *
Account

Description ○
[Empty text box]

Data type * ○
Lookup

Required ○
Business required

Searchable ○

Related table *
Main accounts (mserp)

Advanced options ^

Schema name * ○
cr7b6_Account

Logical name
cr7b6_account

Relationship name *
cr7b6_cr28c_checkrequest_Account_mserp_di...

General
 Enable column security ○

Dashboard
 Appears in dashboard's global filter ○

Save Cancel

Behind the scenes

- Power Automate flow for approval & send data to D365

The screenshot displays a Power Automate flow titled "Send Check Request for approval". The flow starts with a trigger "When a record is selected", followed by an "Initialize variable" step, a "Start and wait for an approval" step, and a "Condition" step. The condition is set to "Outcome x is equal to Approve".

The flow branches into two paths:

- If yes:** This path includes an "Apply to each" loop. Inside the loop, the actions are: "Update a row", "Find Vendor Number", and "Set variable".
- If no:** This path is currently empty, with a placeholder "Add an action".

The interface includes a left-hand navigation pane with options like Home, Approvals, My flows, Create, Templates, Connectors, Data, Monitor, AI Builder, Process advisor, Solutions, and Learn. The top bar shows the Power Automate logo, a search bar, and user information for "Environments crowe".

Demonstration



Summary



Many different options for working with Teams and Dynamics 365 Finance



These are just examples – look at processes in your business to determine how you might use Teams, Power Platform and Dynamics 365 together



Be sure to test in a sandbox prior to trying in production, especially regarding integrations and security

Thank you for attending

Dan Edwards, CPA

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<https://danscorner.info>

