A DYNAMICSCON PRESENTATION

POWERED BY DUG

DYNAMICSCON VIRTUAL

MARCH 2023

FINANCE & OPERATIONS

DYNAMICSCON.COM

Using Power Apps, Teams and Dynamics 365 Finance

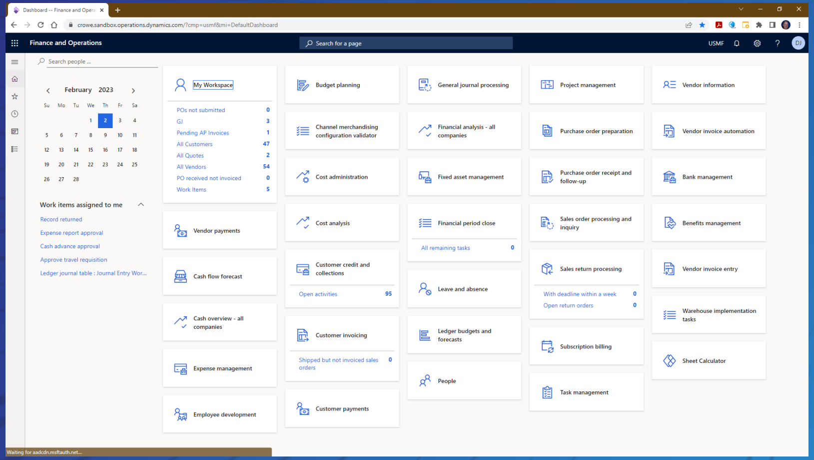
Meet your presenter

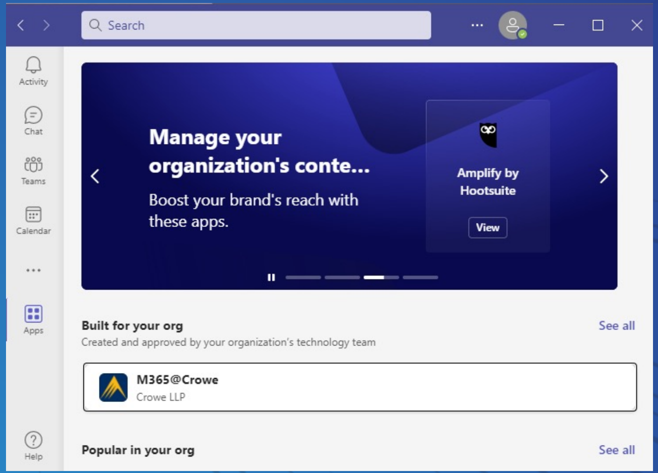
Dan Edwards, CPA – Managing Director @ Crowe LLP

- 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

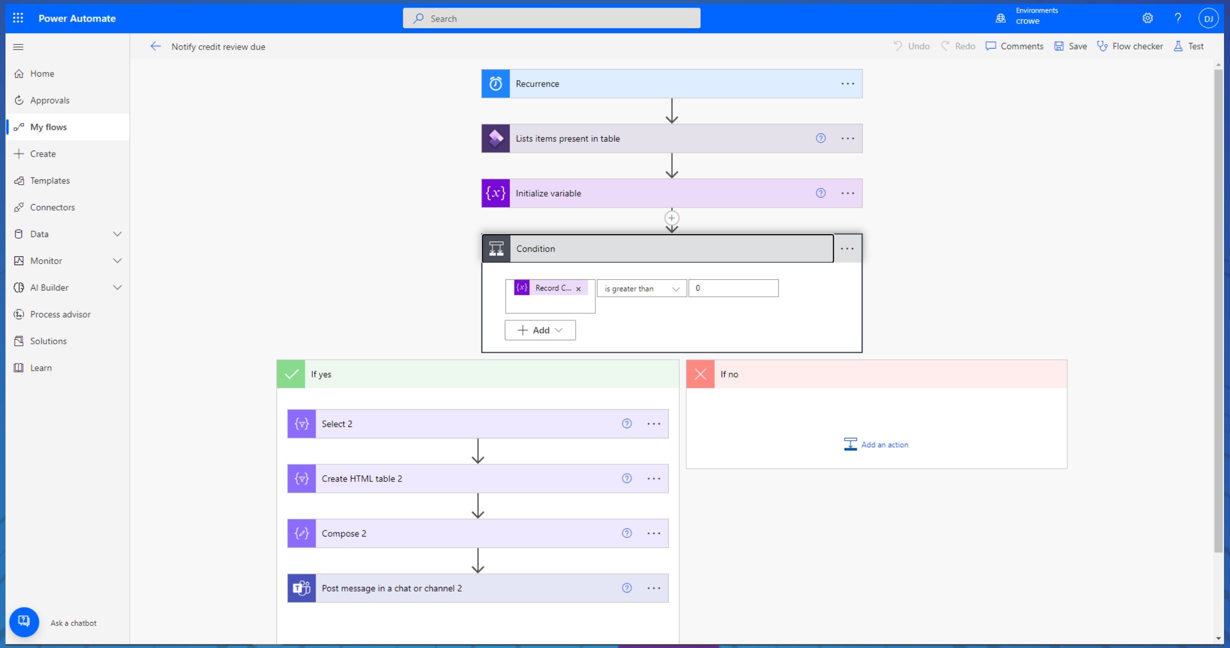
D365 Finance & Supply Chain

	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

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

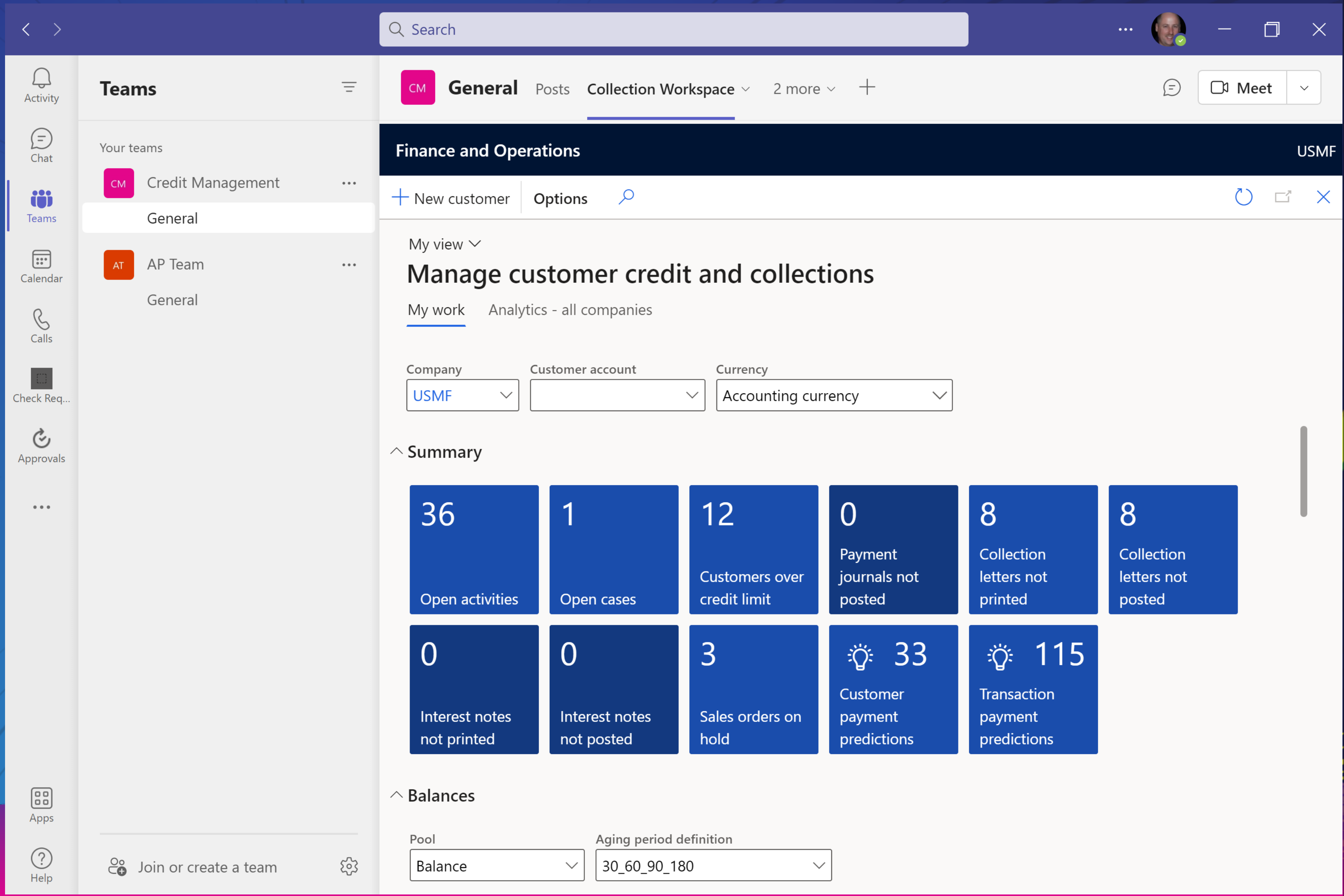


Embed D365 Finance and Supply Chain in Teams

Scenario

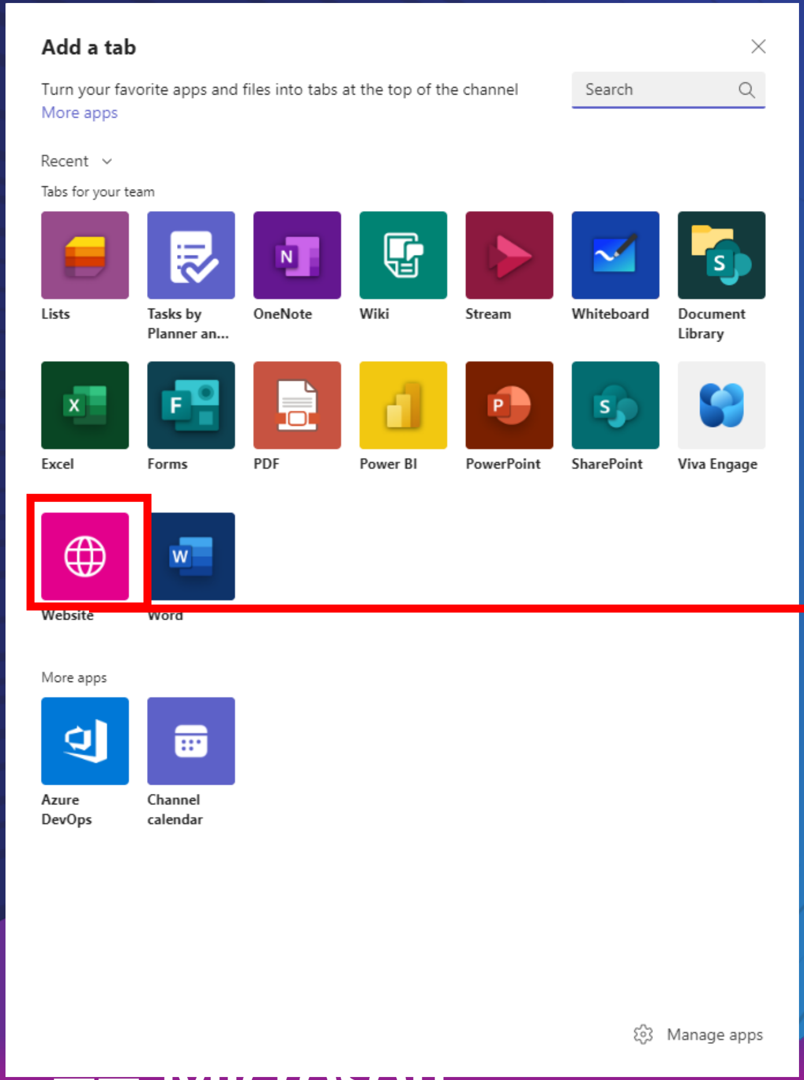
- Our credit team works through Teams to manage the collection process with our clients and want easy access to D365 information

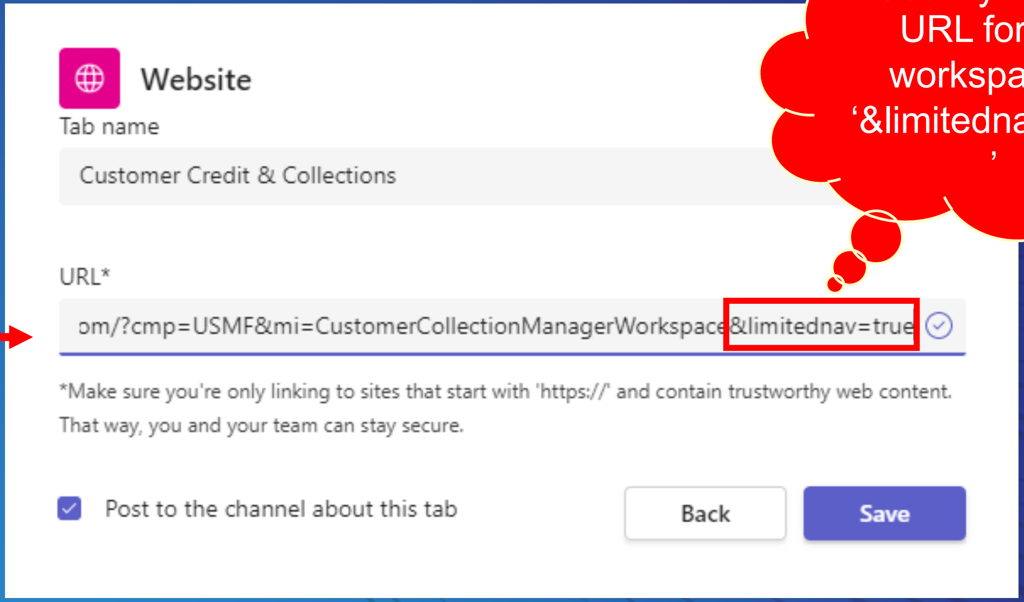
Dynamics 365 inside of Teams



Microsoft

How to Embed D365





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

Demonstration

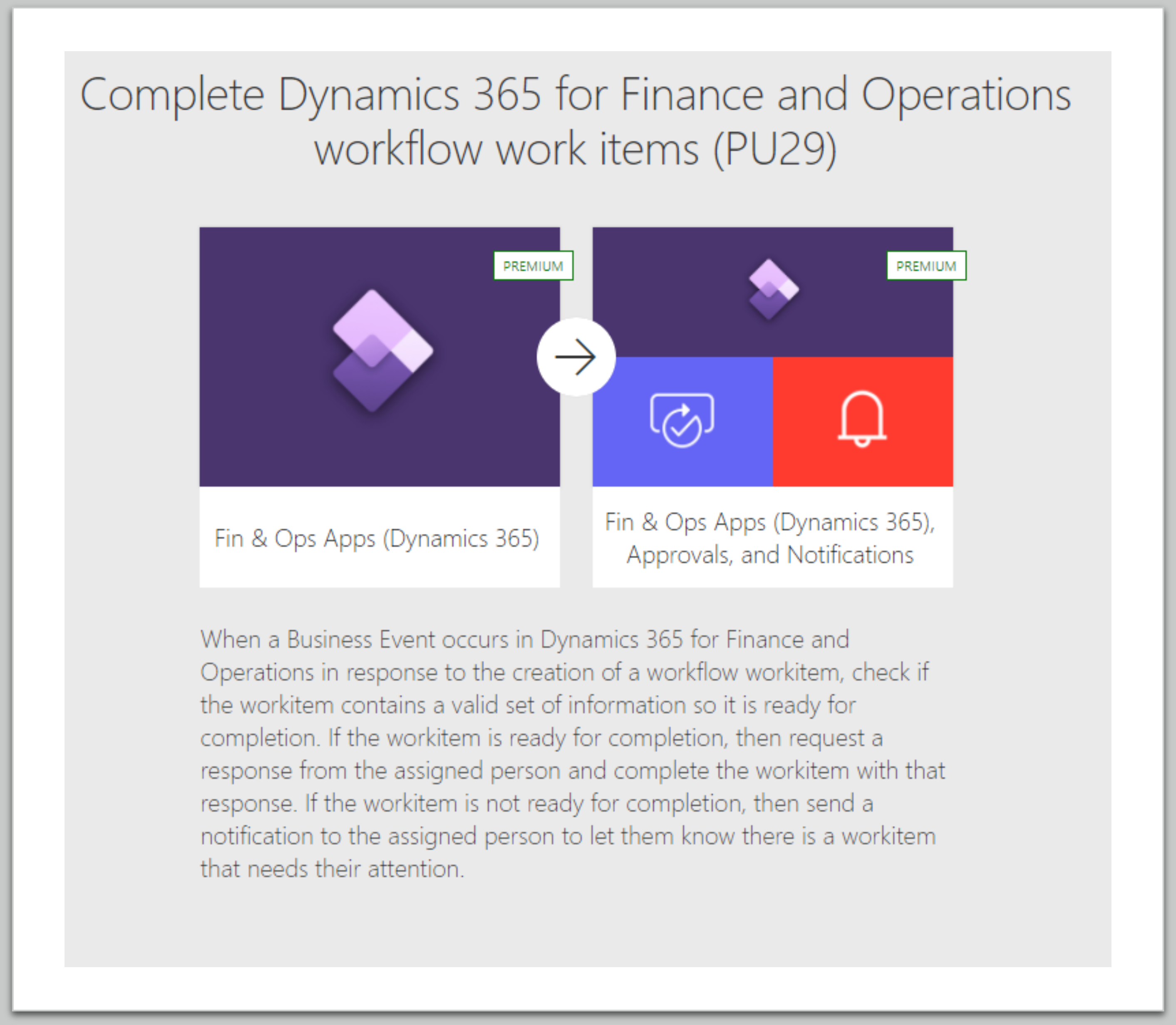
Use Teams for Dynamics 365 Finance Approvals

Scenario

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

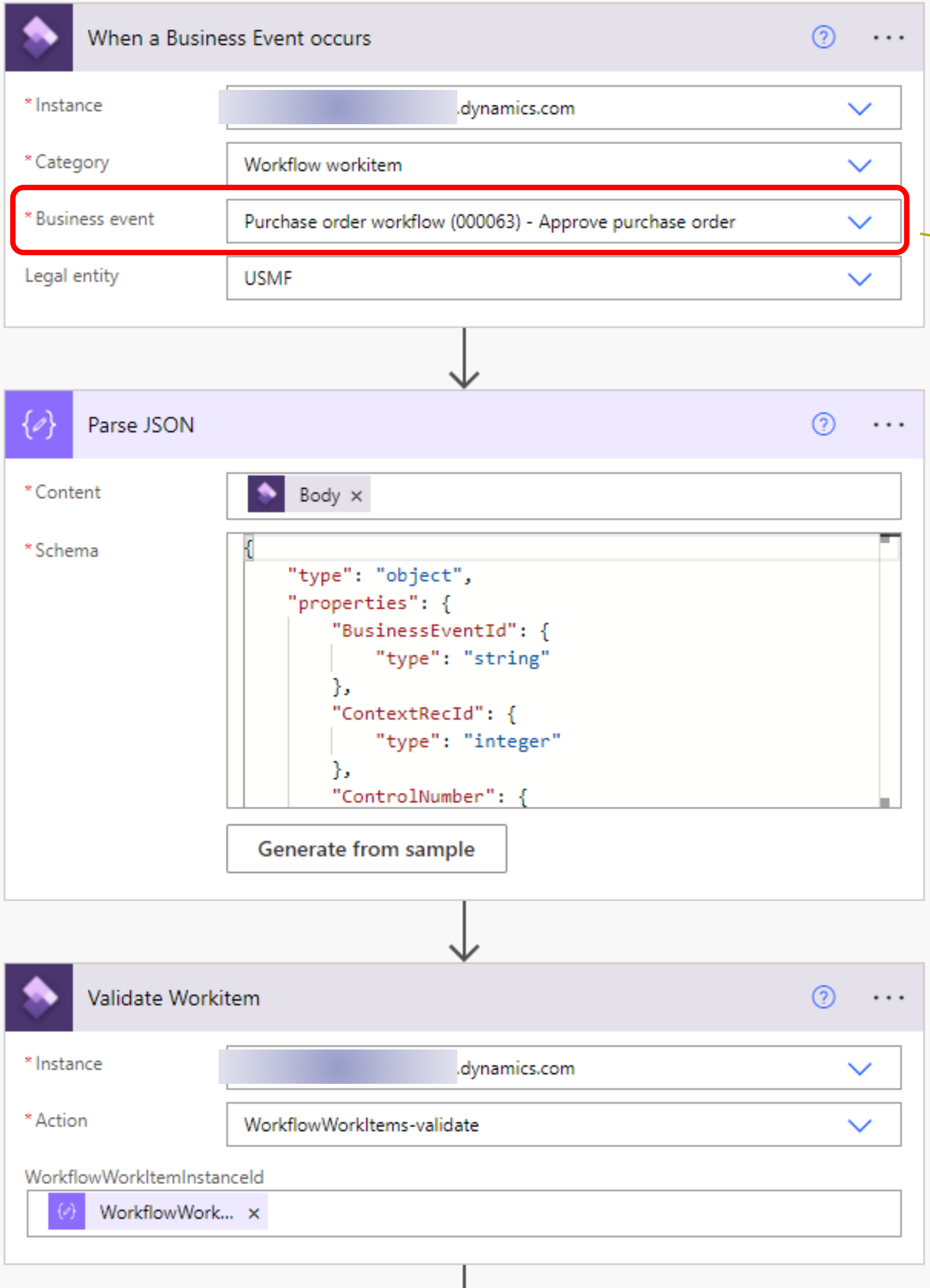
Complete D365 workflow work items

- 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



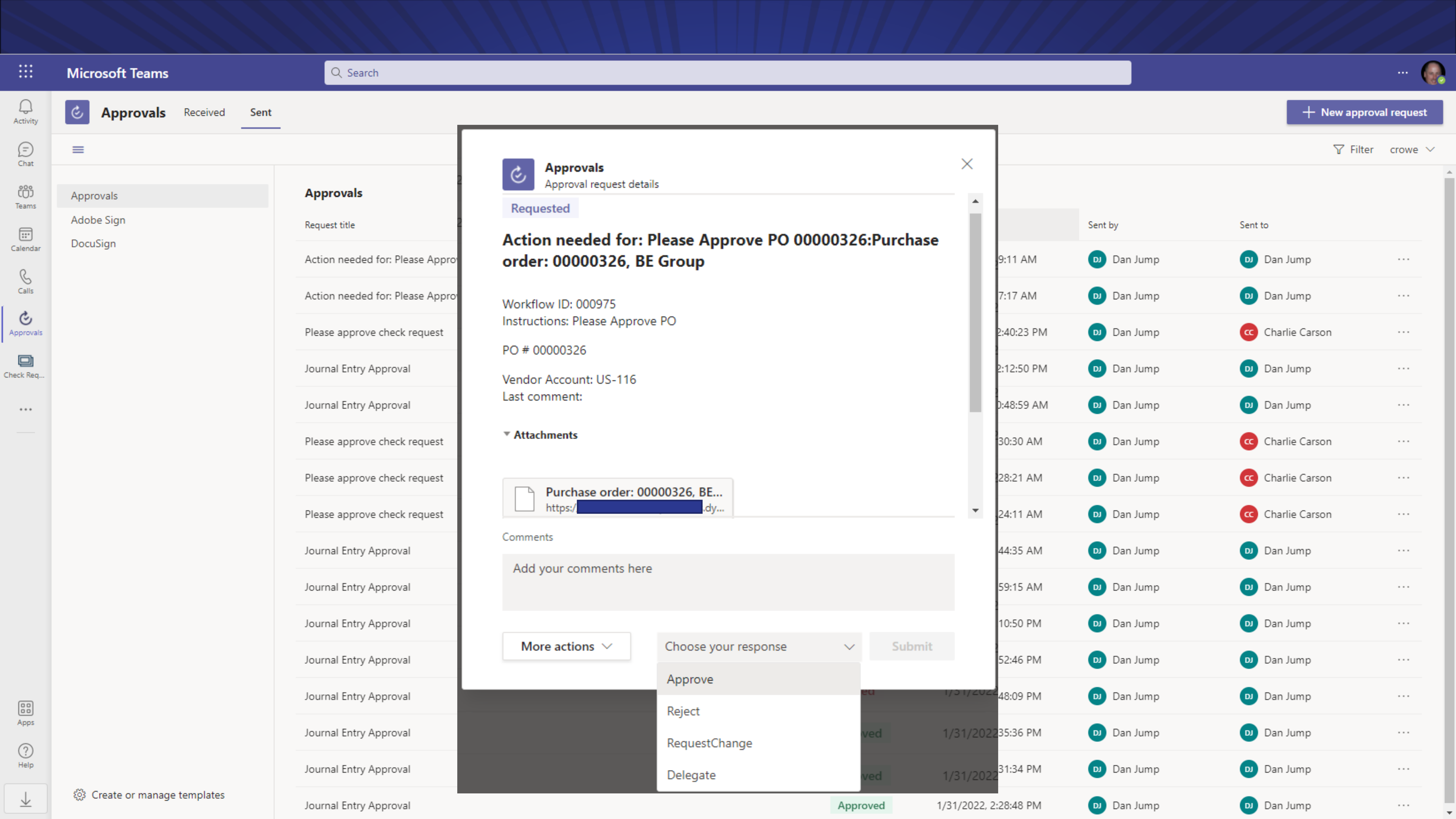
Microsoft

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

Microsoft


Microsoft Teams
Search
Activity
Chat
Teams
Calendar
Calls
Approvals
Check Req...
Apps
Help
Approvals
Received
Sent
New approval request
Filter
crowe
Approvals
Adobe Sign
DocuSign
Create or manage templates
Request title
Sent by
Sent to
Action needed for: Please Appro
Please approve check request
Journal Entry Approval
Dan Jump
Charlie Carson
Approved
1/31/2022, 2:28:48 PM
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:/[redacted].dy...
Comments
Add your comments here
More actions
Choose your response
Submit
Approve
Reject
RequestChange
Delegate

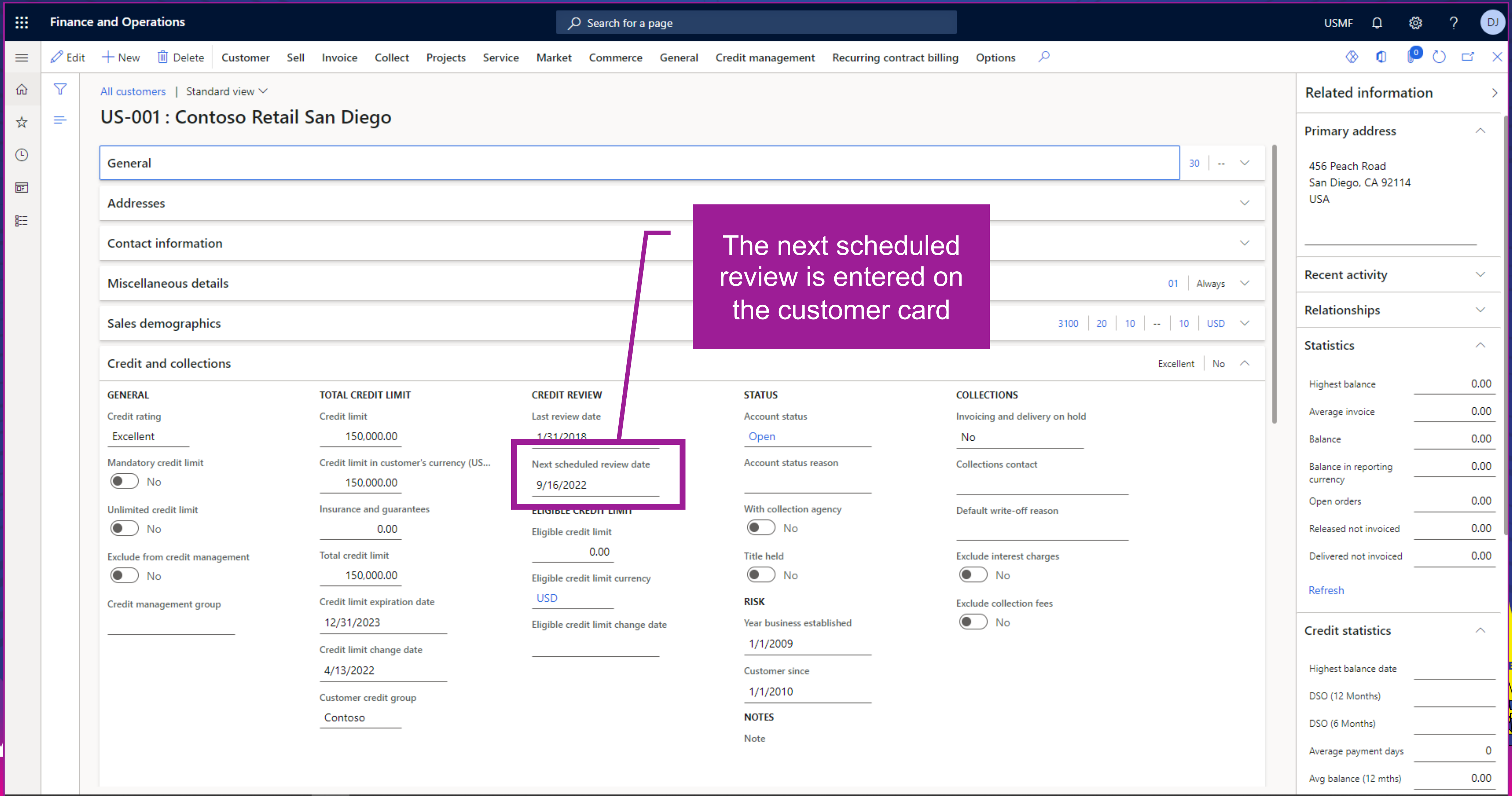
Demonstration

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



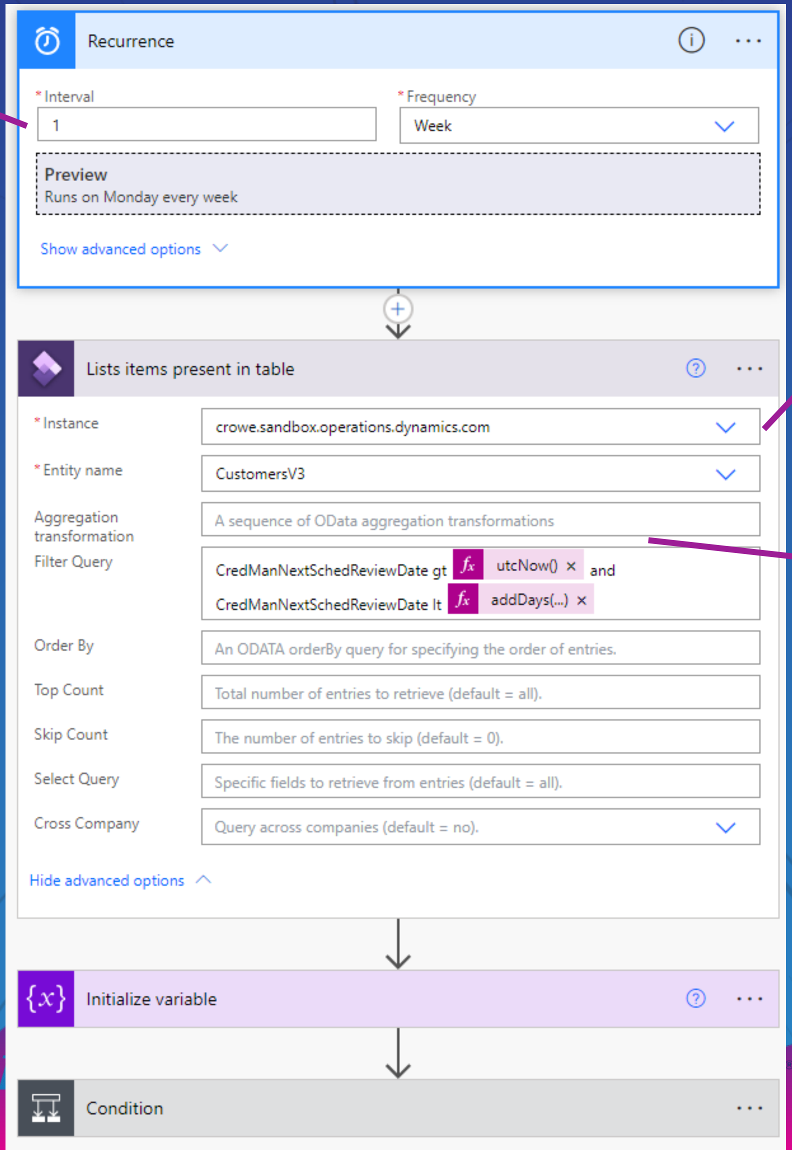
The next scheduled review is entered on the customer card

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



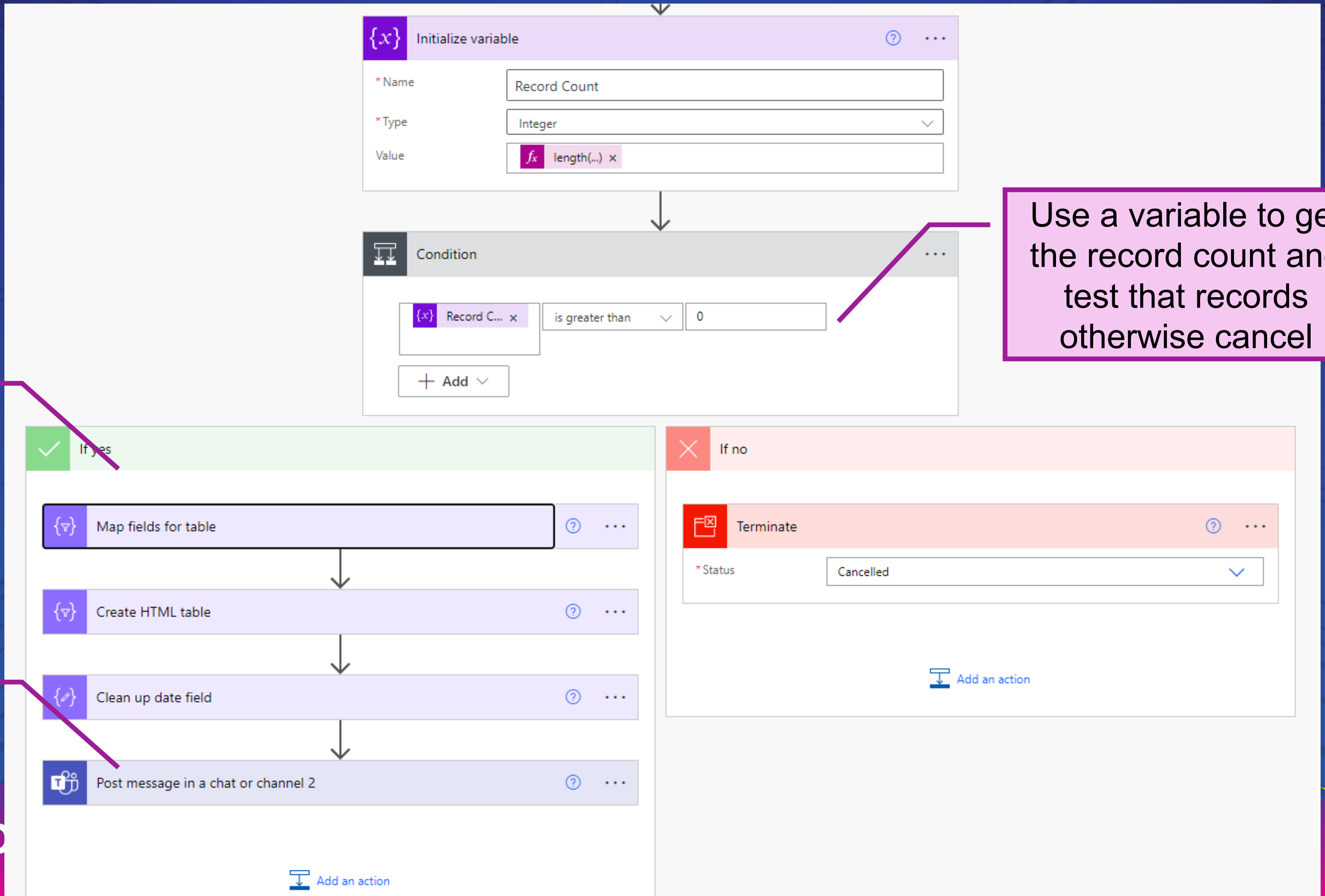
To get the data from D365 use the F&O connecter with CustomersV3 entity

Filter the customers based on the Next Scheduled Review Date

Microsoft

POWERED BY DUG DYNAMICSCON VIRTUAL

Use Power Automate to share data

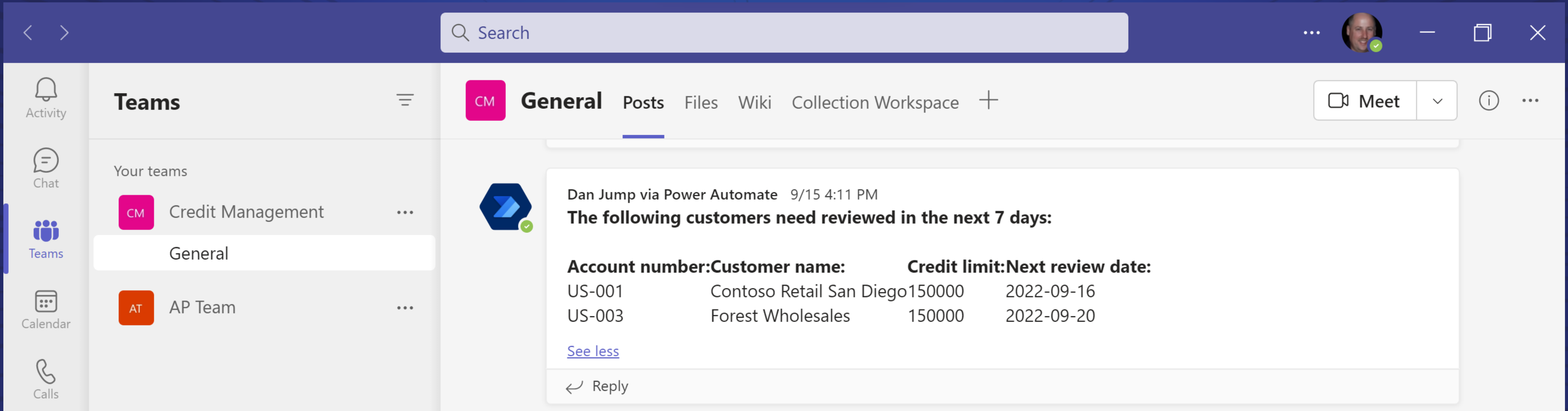


Use a variable to get the record count and test that records otherwise cancel

Prepare the data for Teams

Post data to Teams

Info displayed in Team



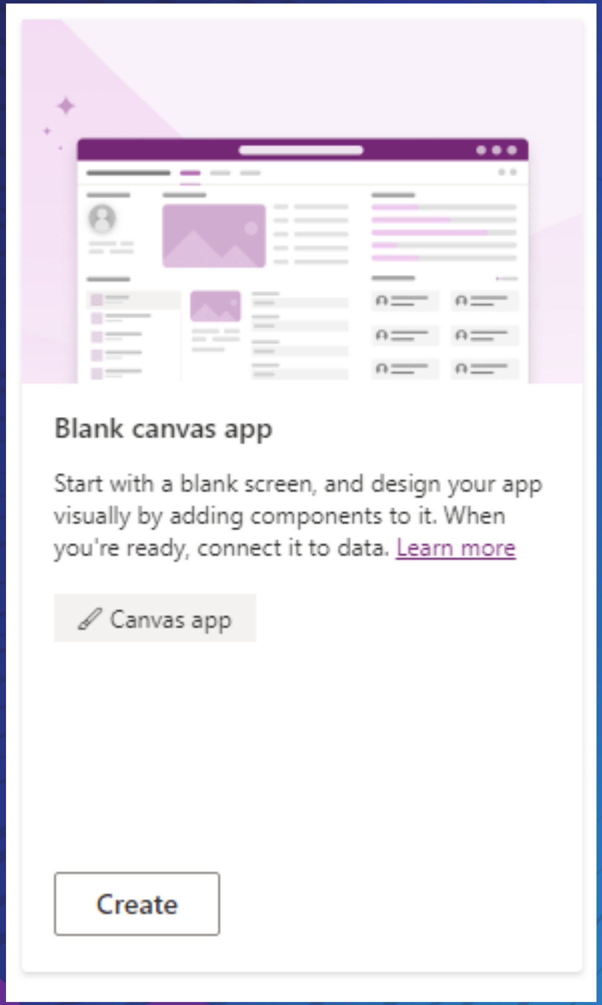
Microsoft DOCENTRIC VERTEX POWERED BY DUG DYNAMICSCON VIRTUAL

Demonstration

Microsoft DOCENTRIC VERTEX POWERED BY DUG DYNAMICSCON VIRTUAL

Using Canvas App and Teams with D365

Canvas Apps



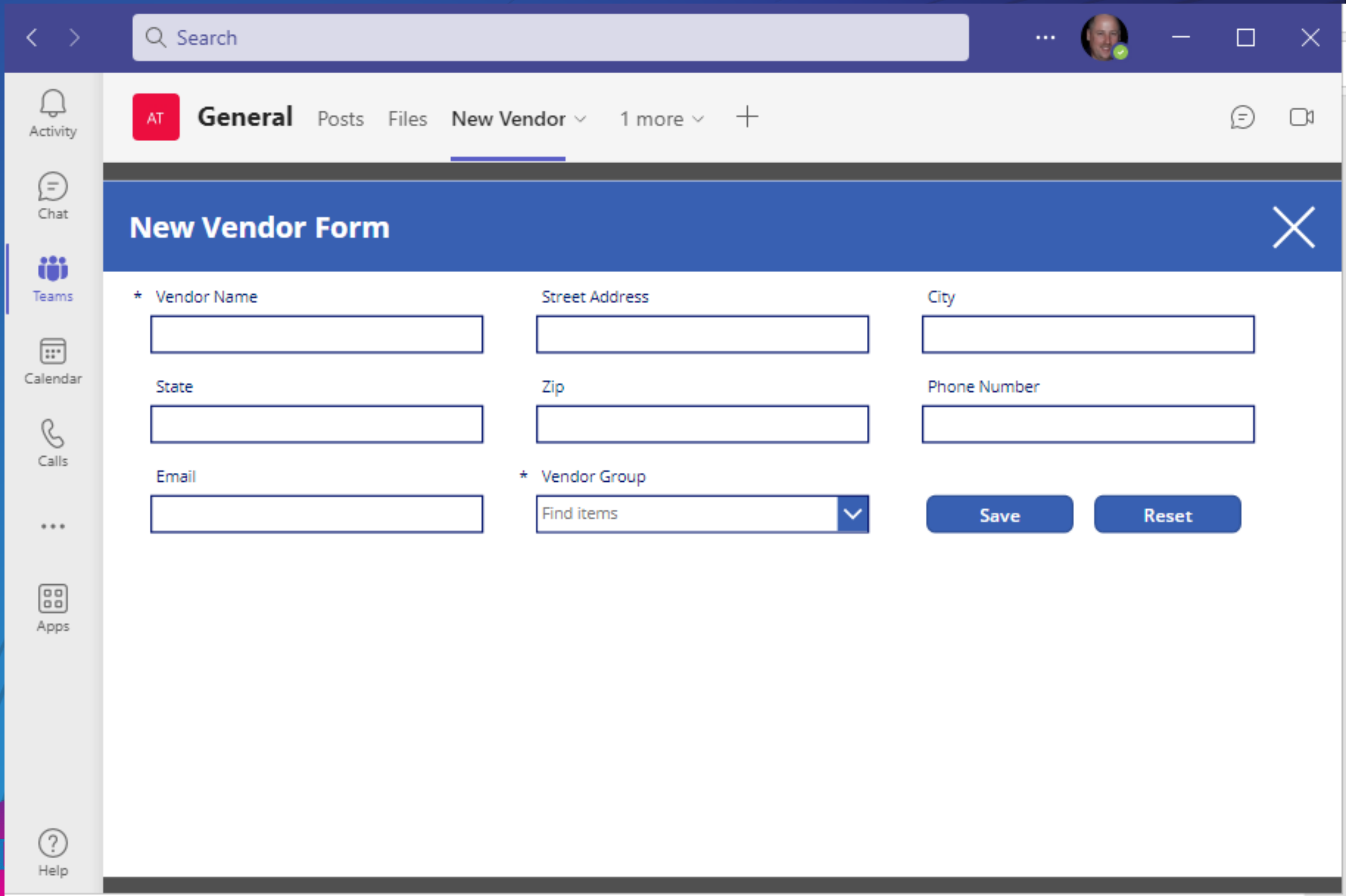
- Canvas Apps are built in Power Apps using drag and drop onto a blank canvas. Canvas app is very easy to be visualized on a tablet or mobile app and it can be connected to many data sources including Dataverse, SharePoint and D365.

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

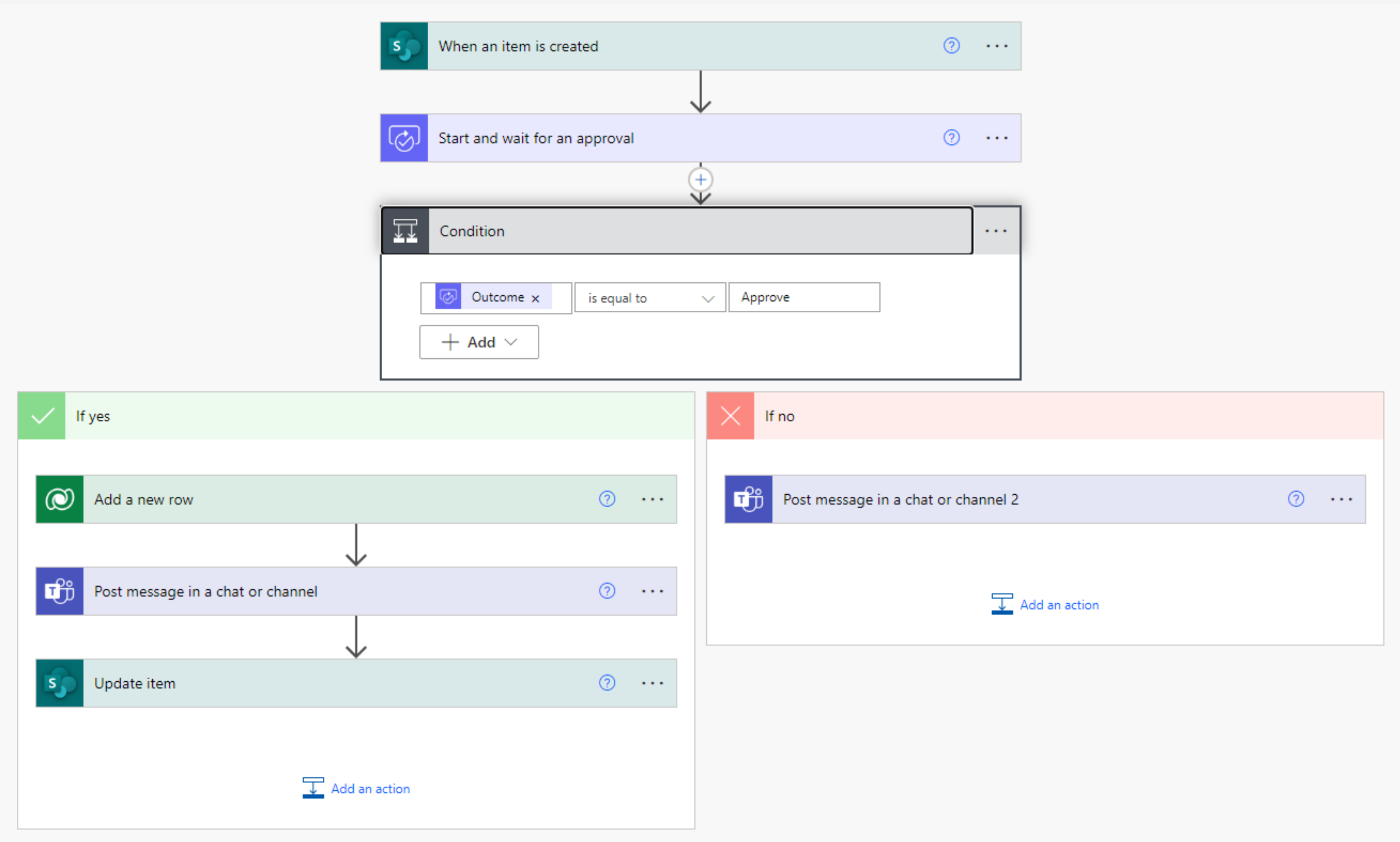
Using Canvas App from PowerApps

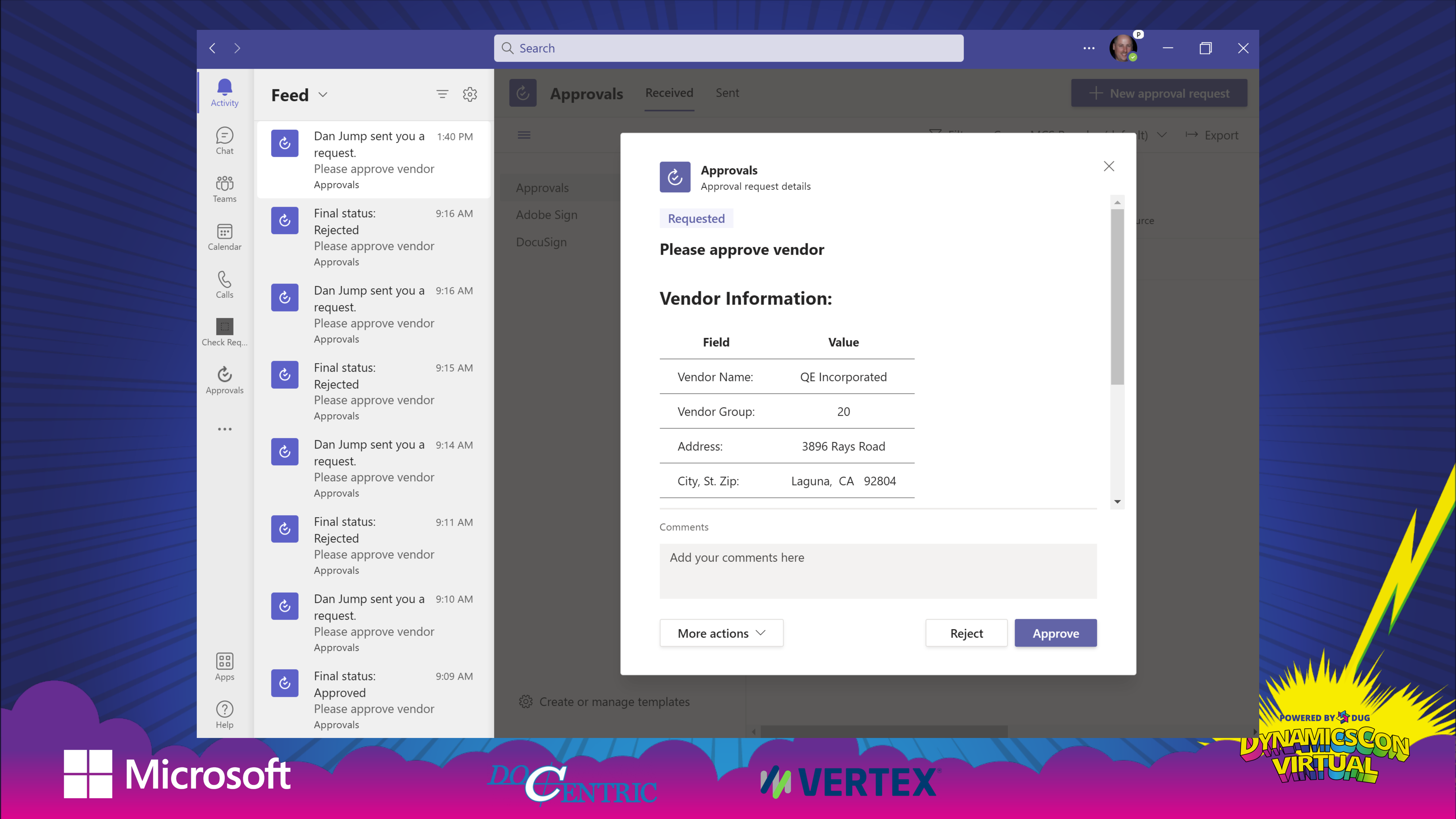
- Create a simple Canvas App based on a SharePoint list and display it in Teams



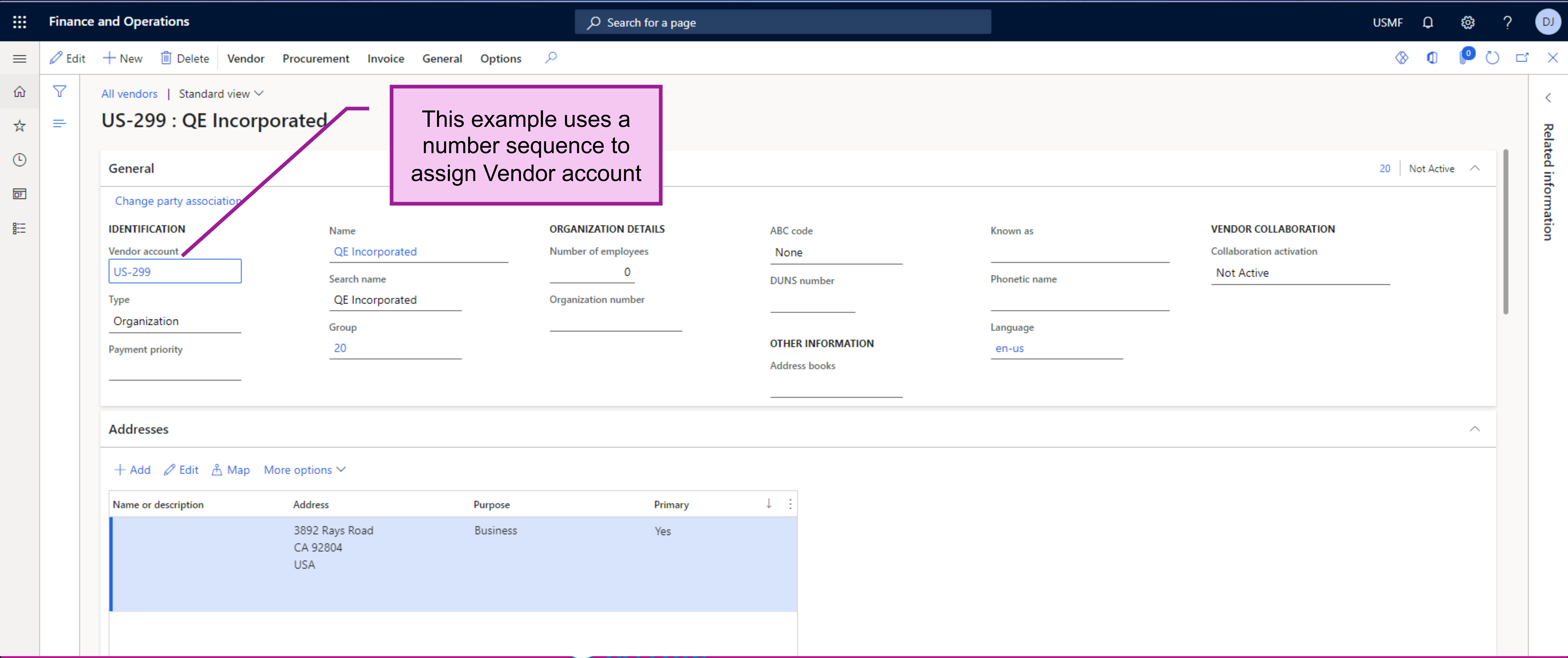
Microsoft

Use Power Automate to process form

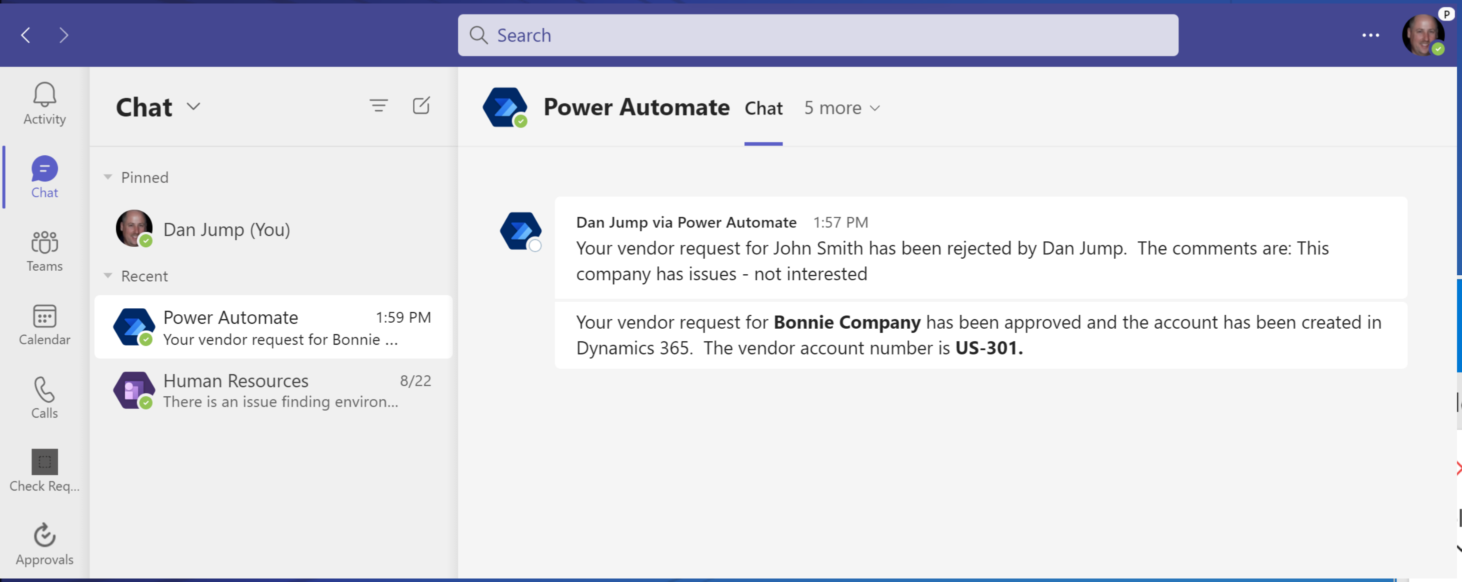


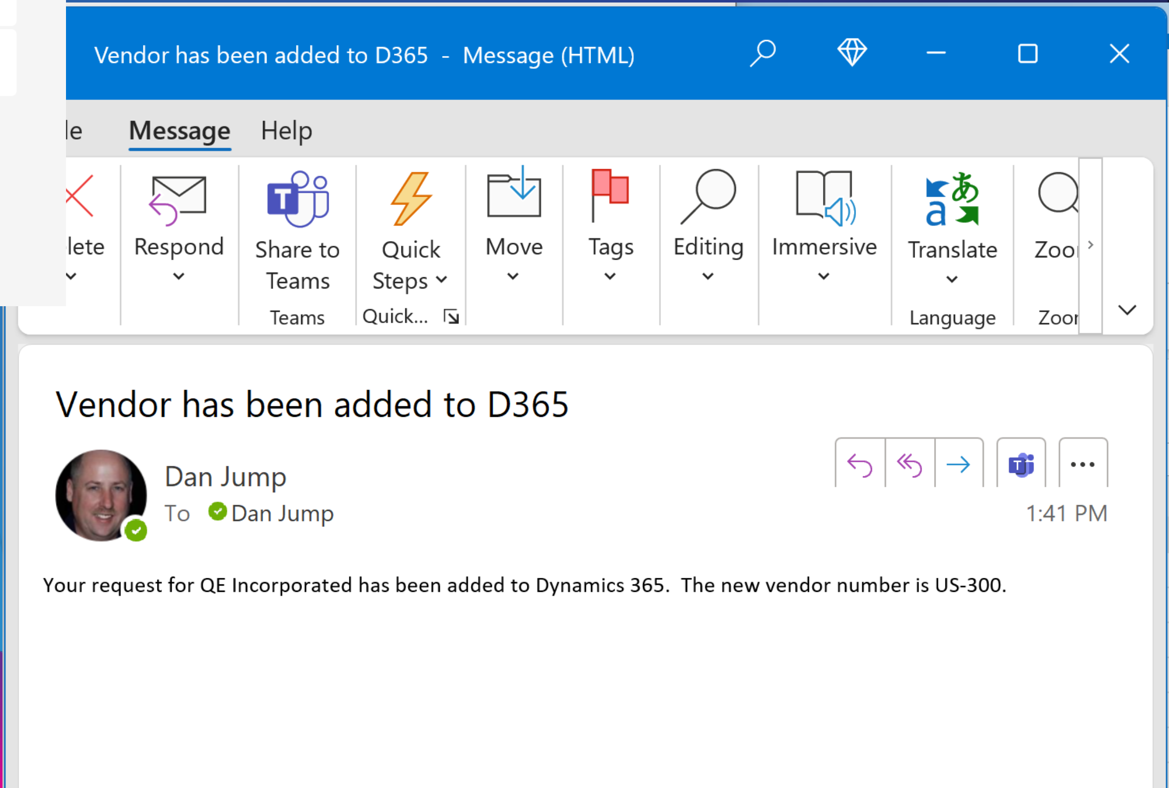

Search
Feed
Activity
Chat
Teams
Calendar
Calls
Check Req...
Approvals
Apps
Help
Dan Jump sent you a request.
1:40 PM
Please approve vendor
Approvals
Final status: Rejected
9:16 AM
Please approve vendor
Approvals
Dan Jump sent you a request.
9:16 AM
Please approve vendor
Approvals
Final status: Rejected
9:15 AM
Please approve vendor
Approvals
Dan Jump sent you a request.
9:14 AM
Please approve vendor
Approvals
Final status: Rejected
9:11 AM
Please approve vendor
Approvals
Dan Jump sent you a request.
9:10 AM
Please approve vendor
Approvals
Final status: Approved
9:09 AM
Please approve vendor
Approvals
Approvals
Received
Sent
New approval request
Export
Approvals
Adobe Sign
DocuSign
Create or manage templates
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
Microsoft
DOCENTRIC
VERTEX
POWERED BY DUG
DYNAMICSCON VIRTUAL

Vendor setup in Dynamics 365



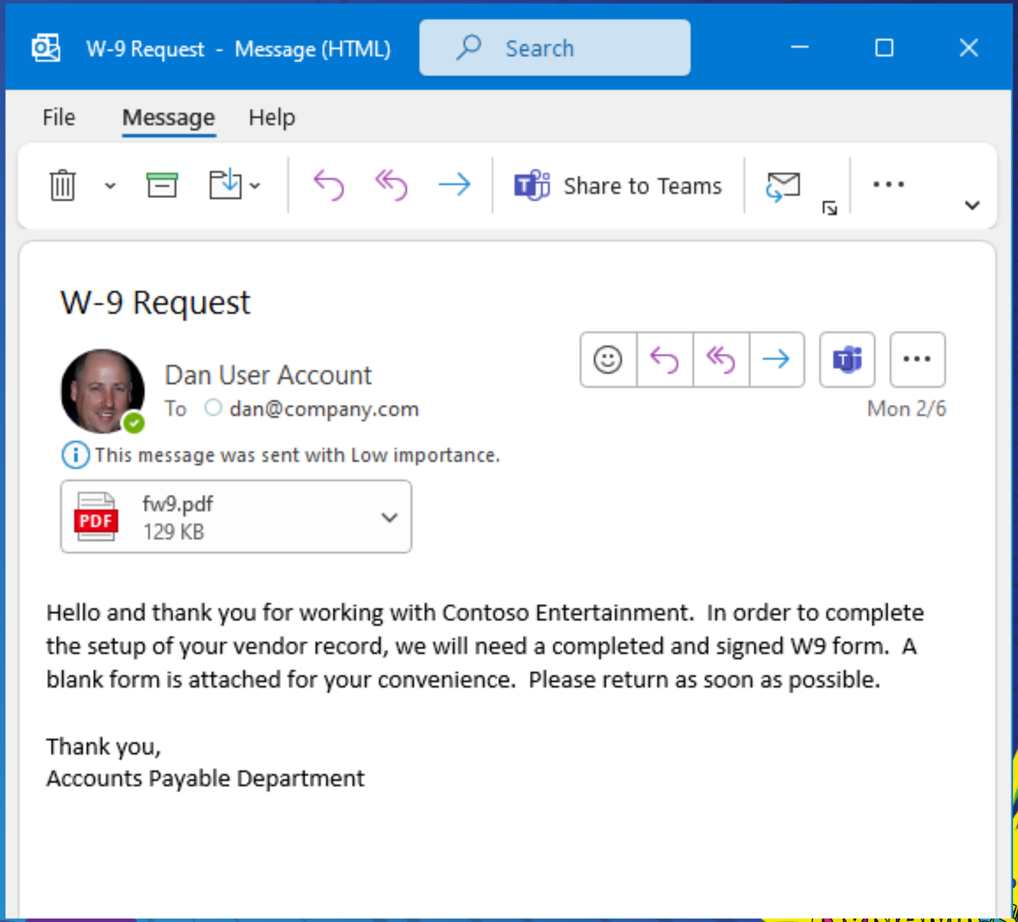
Send reply to the originator





Microsoft
DOCENTRIC

Send welcome email to Vendor

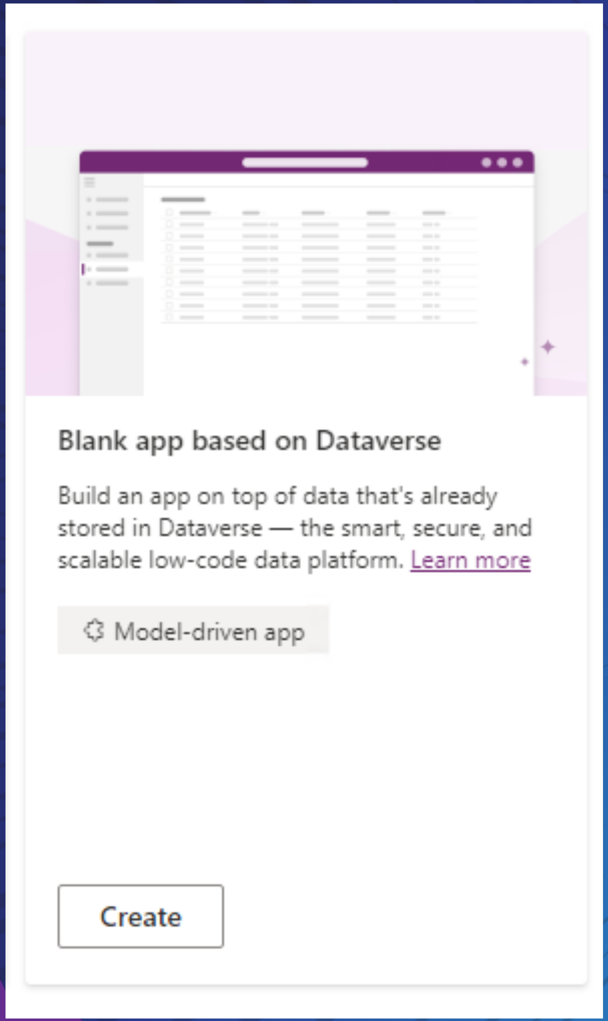


Microsoft DOCENTRIC VERTEX DYNAMICSCON VIRTUAL

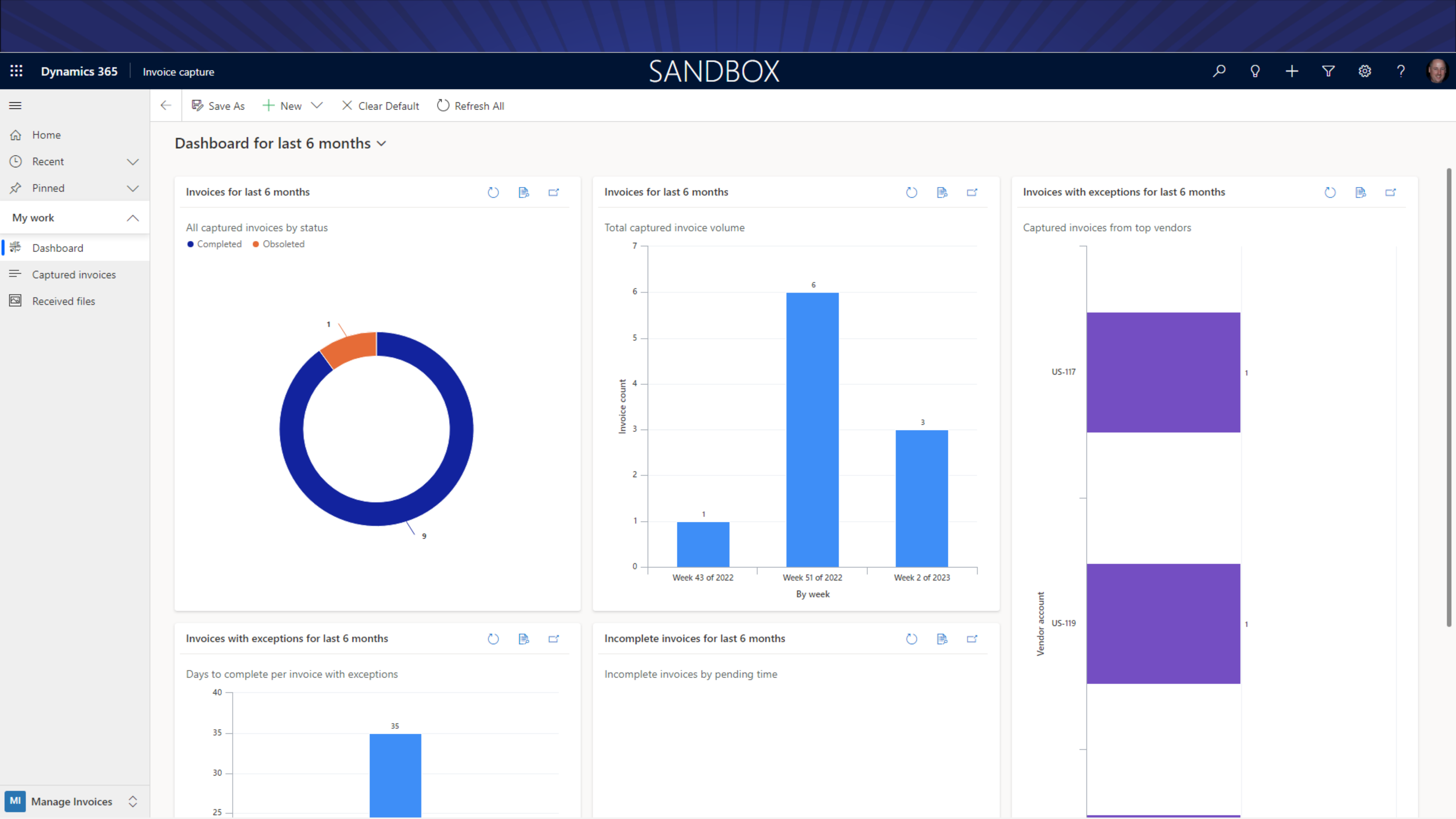
Demonstration

Use Model-Driven App to work with Teams with D365

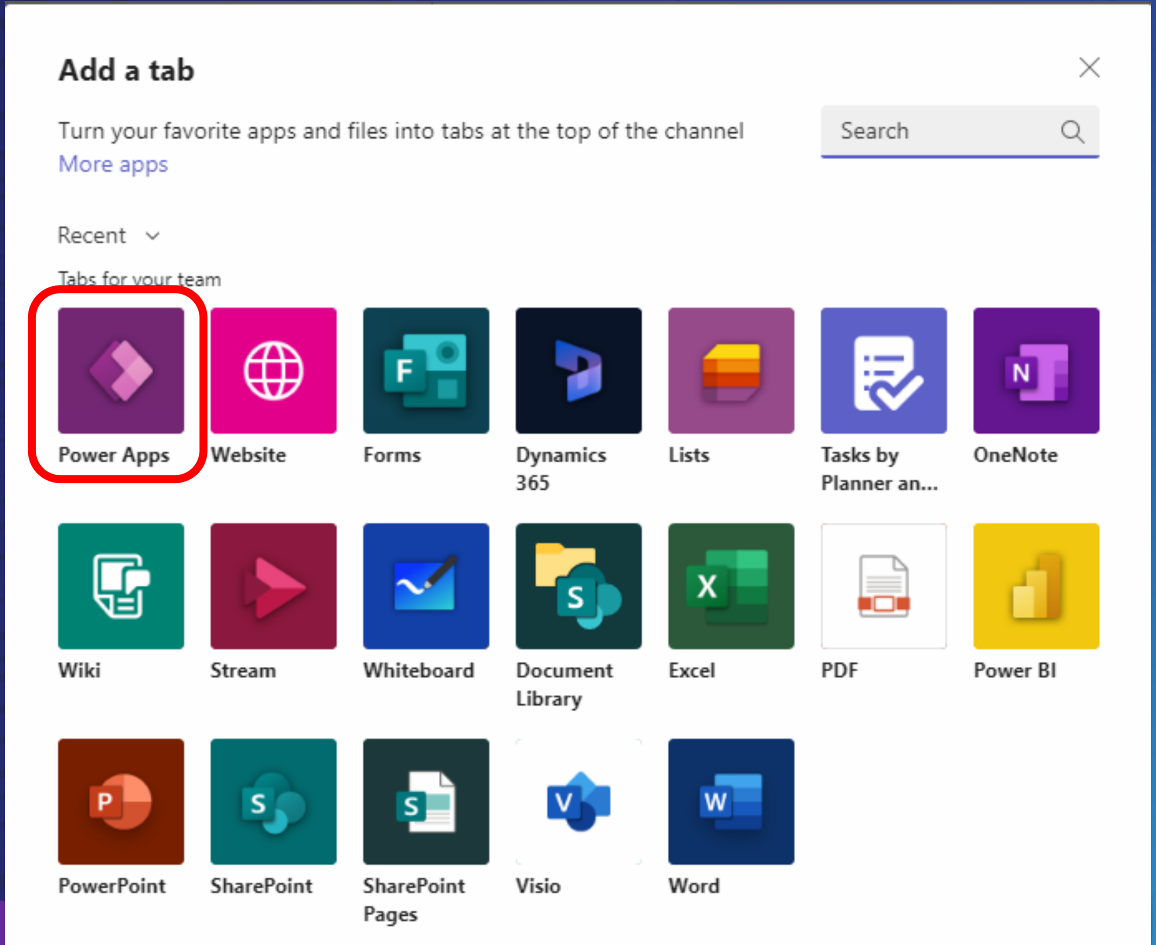
Model-Driven Apps

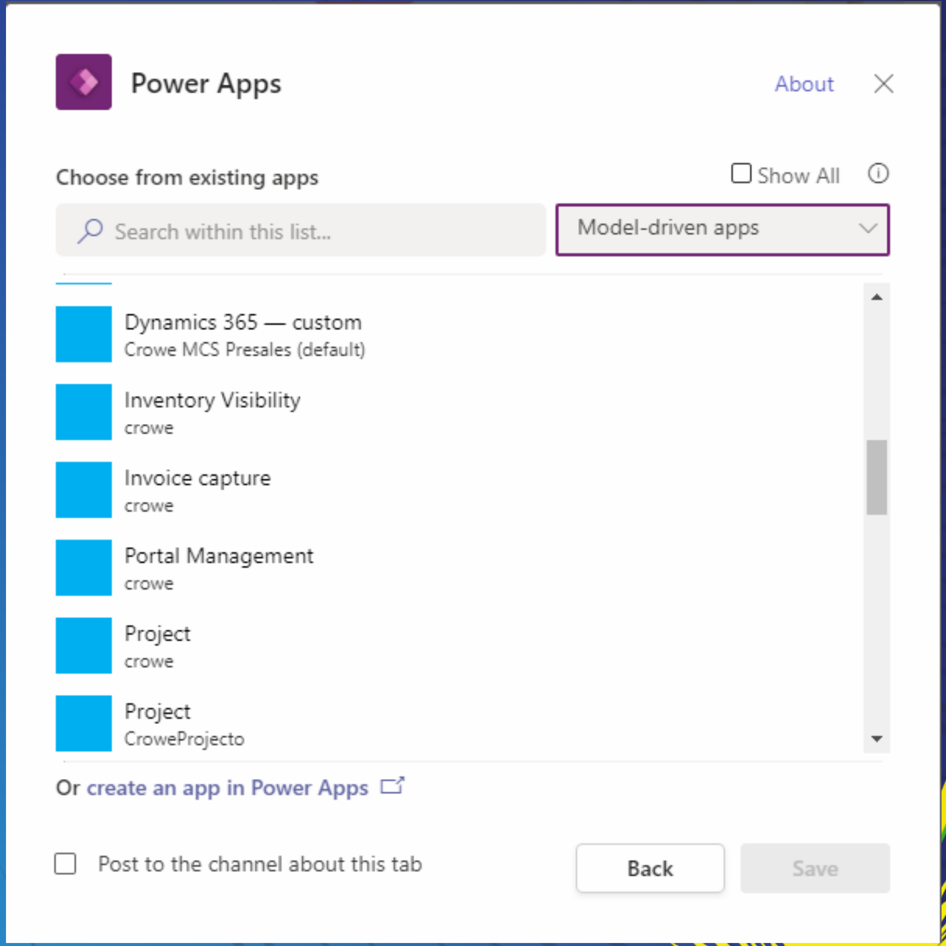


- A model-driven app is a reasonably quick application development solutions with drag-and-drop components like charts, dashboards, survey forms, etc. It is integrated with Dataverse as well as Power Automate and Power BI.


Dynamics 365
Invoice capture
SANDBOX
Save As
New
Clear Default
Refresh All
Home
Recent
Pinned
My work
Dashboard
Captured invoices
Received files
MI
Manage Invoices
Dashboard for last 6 months
Invoices for last 6 months
All captured invoices by status
Completed
Obsoleted
1
9
Invoices for last 6 months
Total captured invoice volume
Invoice count
0
1
2
3
4
5
6
7
Week 43 of 2022
Week 51 of 2022
Week 2 of 2023
By week
Invoices with exceptions for last 6 months
Captured invoices from top vendors
Vendor account
US-117
US-119
Invoices with exceptions for last 6 months
Days to complete per invoice with exceptions
40
35
30
25
Incomplete invoices for last 6 months
Incomplete invoices by pending time

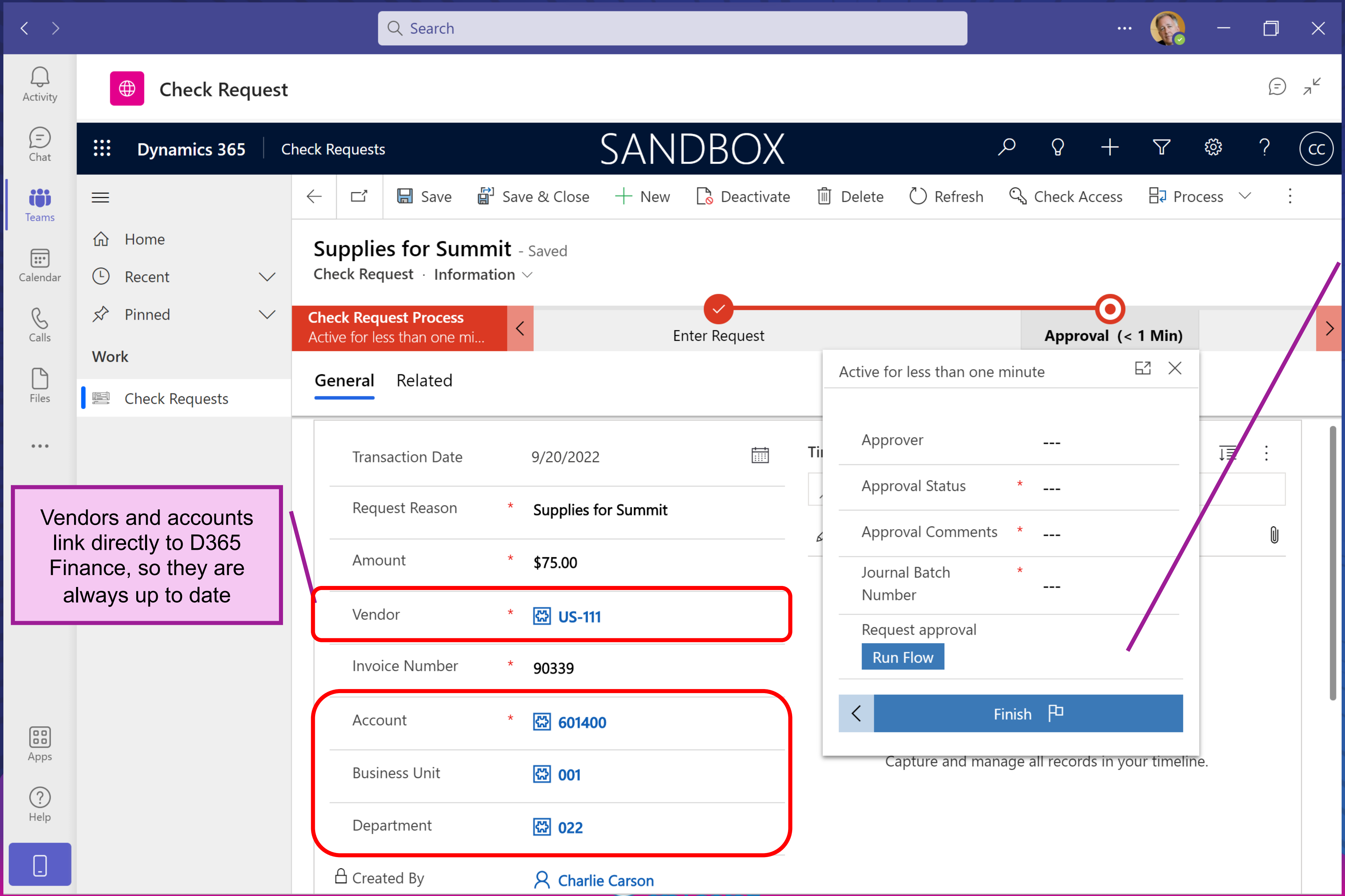
Adding Model-Driven App to Teams





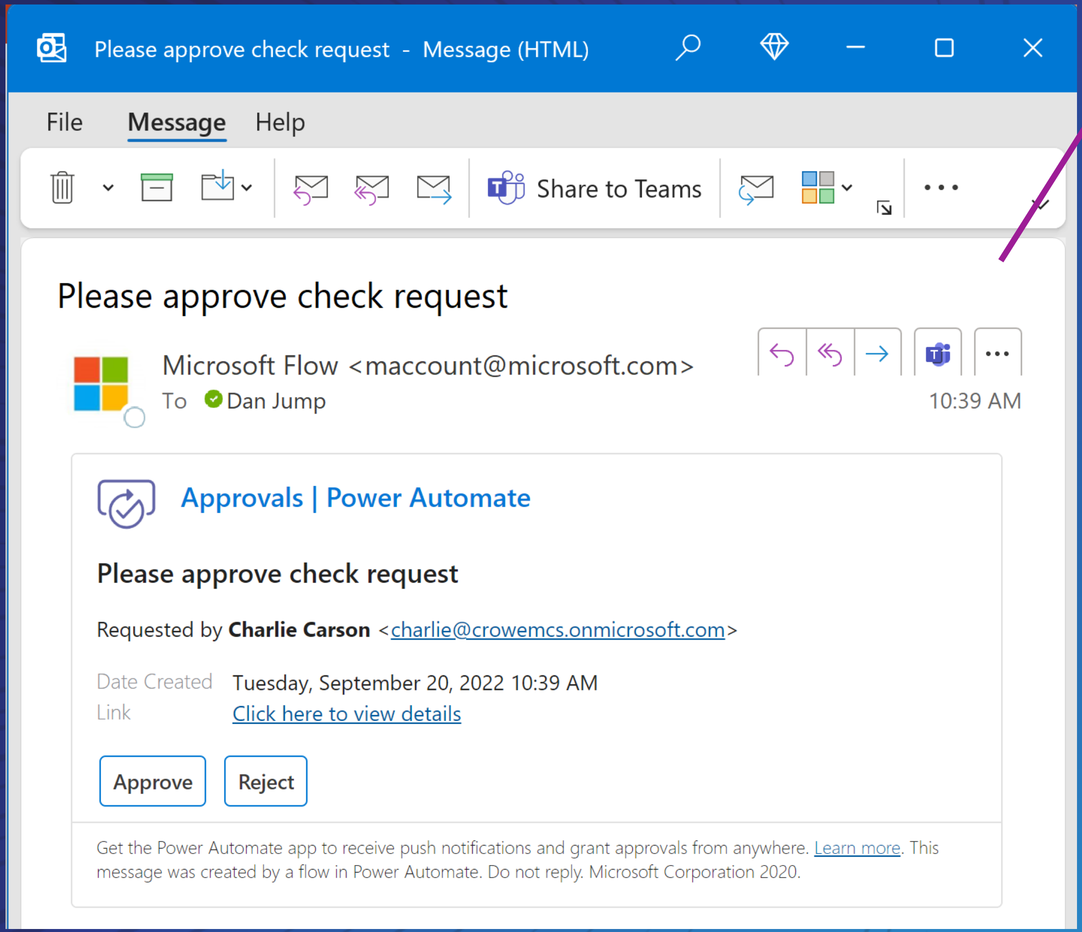
Scenario

- 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.

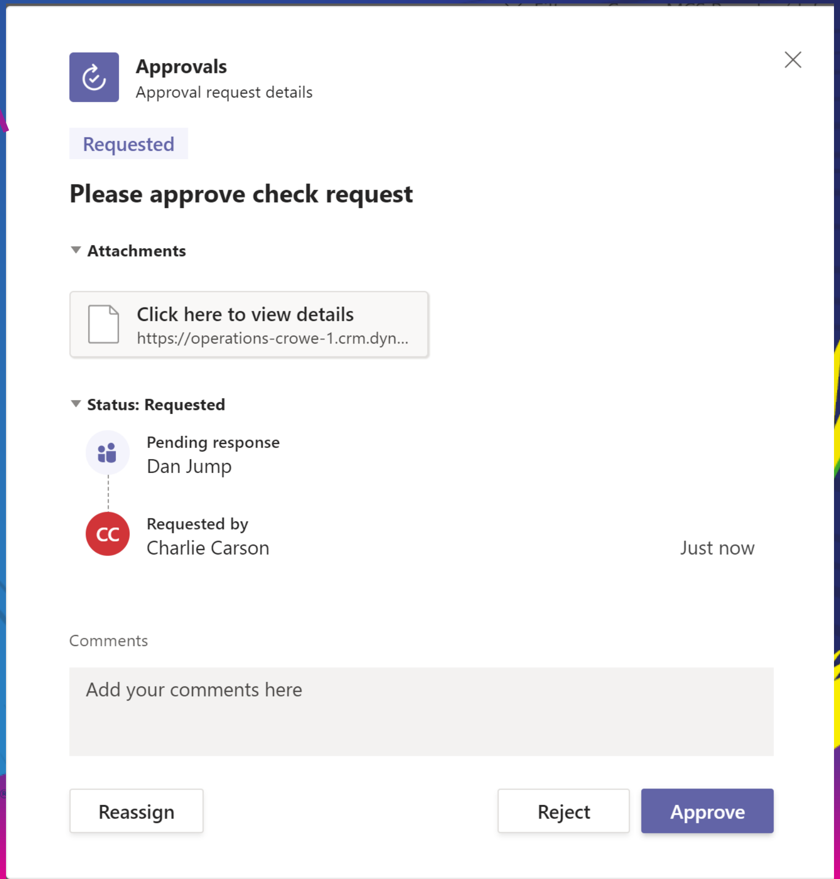


Vendors and accounts link directly to D365 Finance, so they are always up to date

Enter request information and submit for approval



Approval go through Outlook and Teams



Approvals
Approval request details

Approved

Please approve check request

▾ **Attachments**

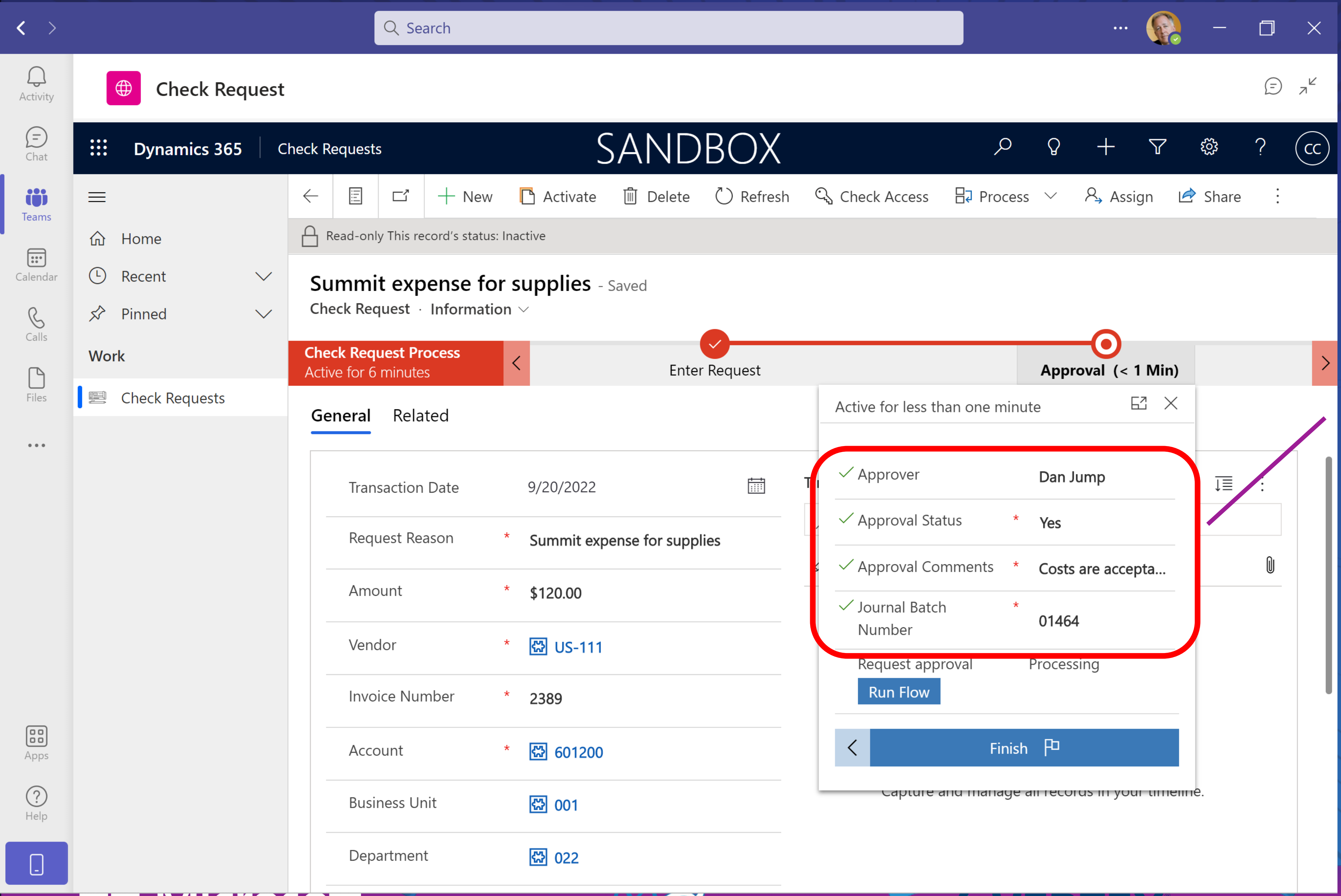
Click here to view details
https://operations-crowe-1.crm.dyn...

▾ **Final status: Approved**

DJ Approved by
Dan Jump — 2m ago
This cost is acceptable

CC Requested by
Charlie Carson — 6m ago

Once approved the user will be informed through a Teams alert



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	☐		☐			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

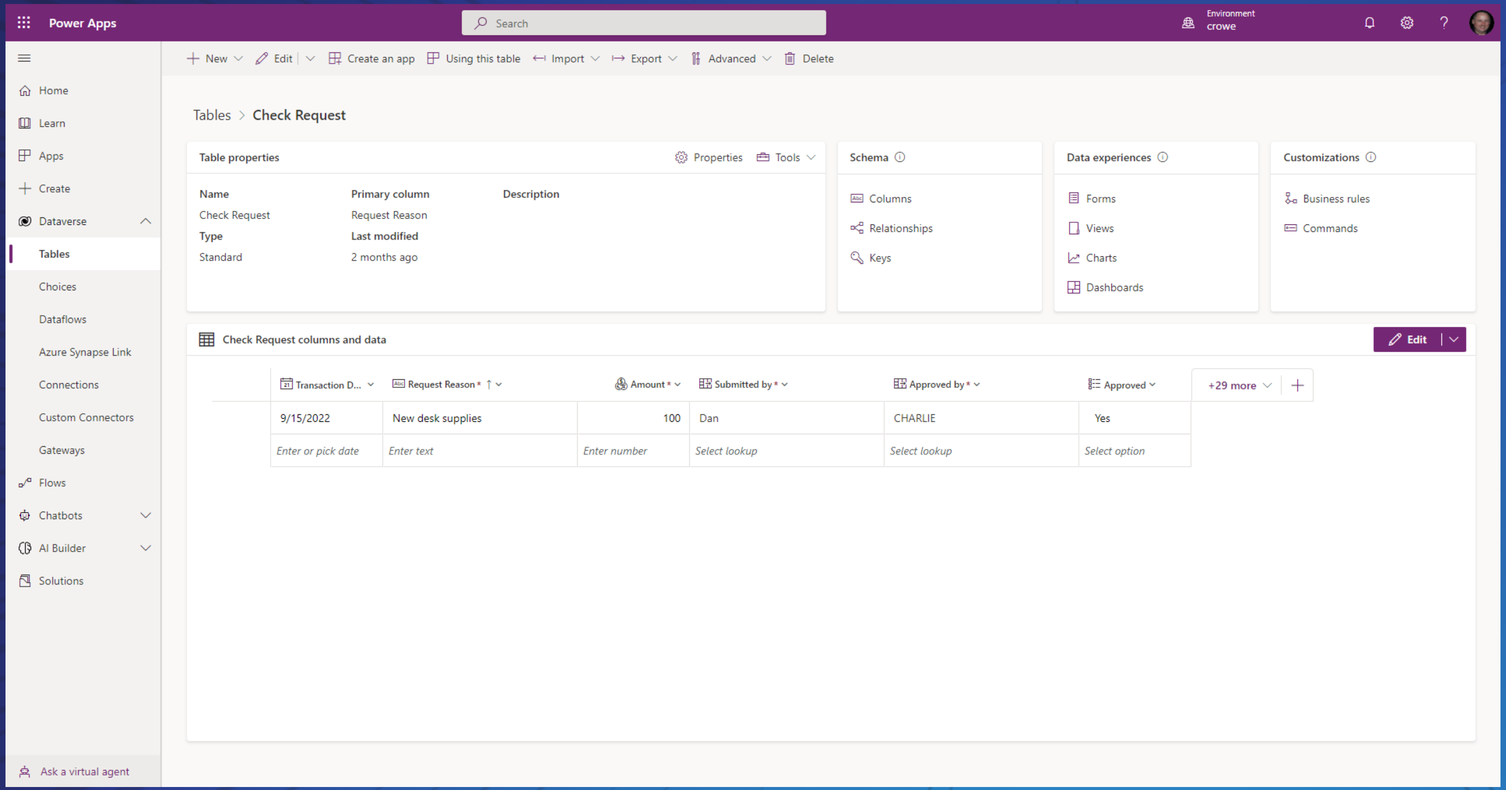
List | General | Invoice | Cash discount | Fixed assets | Remittance | History | 1099 | Foreign trade

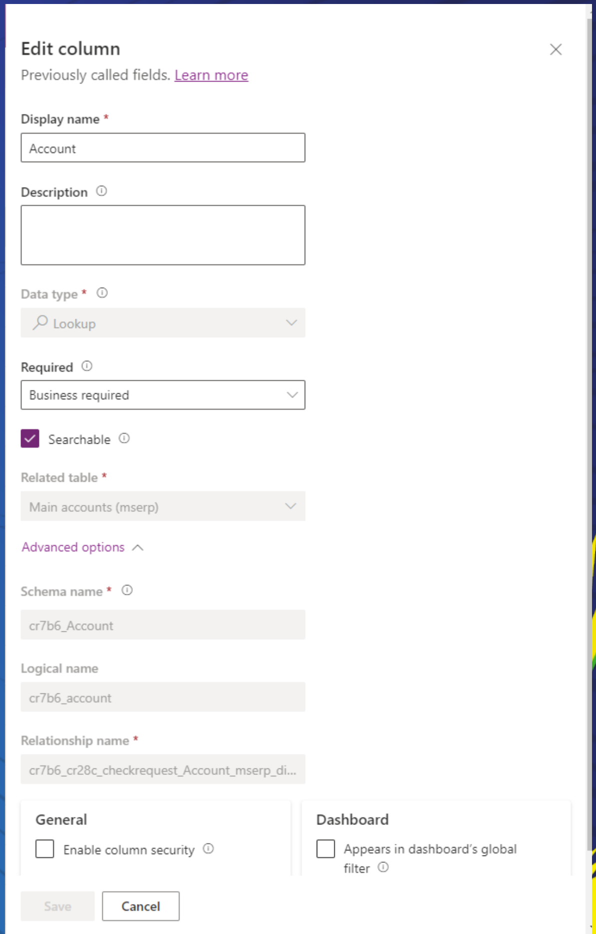
New | Delete | Settle transactions | Financial dimensions | Sales tax | Functions | Voucher | View marked transactions | Deferrals

Date	Voucher	Deferred	Account type	Account	Account name	Invoice date	Invoice	Description	Debit	Credit	Total amount	Currency
9/20/2022	APIN000119	☐	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

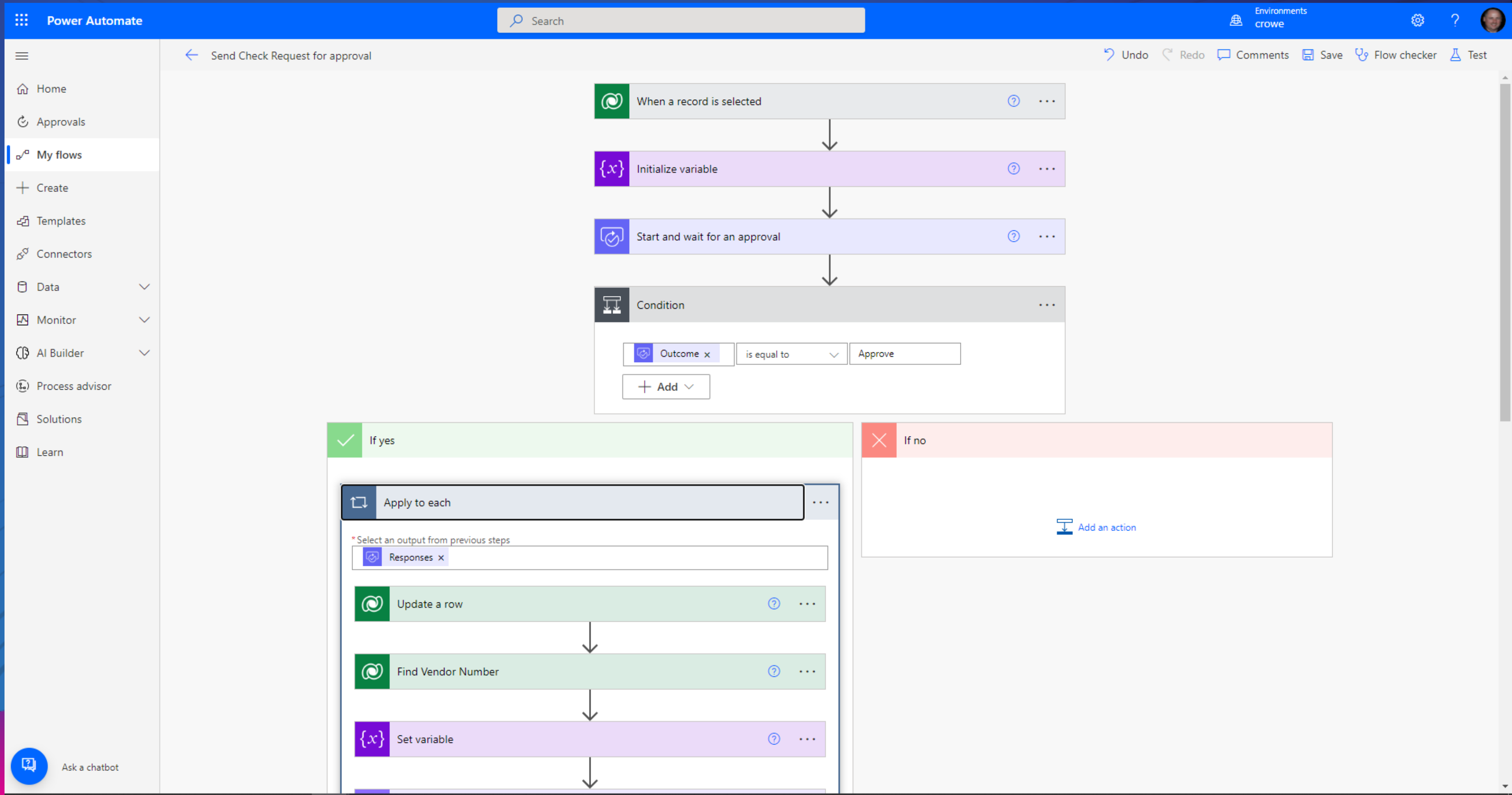
Behind the scenes





Behind the scenes

- Power Automate flow for approval & send data to D365



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

dan.edwards@crowe.com
https://www.linkedin.com/in/dsedwards
https://danscorner.info