

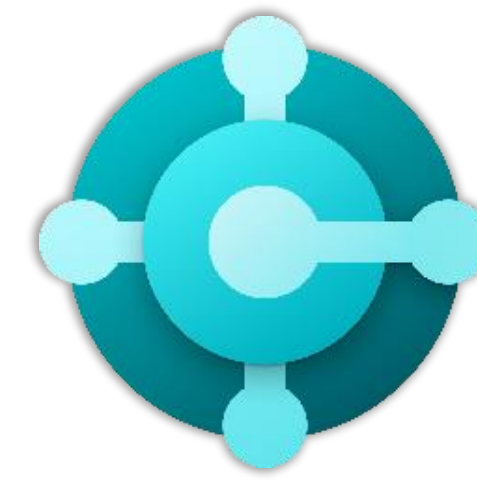


Build collaborative apps for Business Central with Microsoft 365 and Teams

Monica Ahuja, Sam van Lieshout, Evgenij Korovin
Microsoft

10 YEAR ANNIVERSARY
10 YEAR ANNIVERSARY

Agenda – create, extend and use in



- Collaborative features in Teams
- Extend Adaptive Cards



- Create and Use Excel report layouts
- Design and Build Organizational Types



- Share deeplinks



- Create share actions
- Administrate setup

Work smarter with M365 collaborative apps

Evgenij checks Teams...
performs analysis with Excel Layouts

General (BcTechDaysDemo) | Microsoft Teams

Business Manager - Dynamics 365

←

↺

https://teams.microsoft.com/_#/conversations/General?threadId=19:kX4vGrFXHSKcZz2sQvlabkR6HerY-Lf4myEc3YqGhDk1@thread.tacv2&ctx=channel

🔊

★

🔖

🔒

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⋮

Microsoft Teams

🔍 Search

⋮ EK

🔔 1

Activity

💬

Chat

👥

Teams

📅

Calendar

📞

Calls

📁

Files

⋮

🧩

Apps

❓

Help

⬇️

👤 +

Join or create a team

⚙️

Teams

BC

BcTechDaysDemo

⋮

General

Developers channel

Support Cases

C

Contoso

⋮

General

Test BC

BC

General

Posts

Files

Customers

New

Adatum Corpo...

New

+

🗨️ Meet

⌵

ⓘ

⋮

Details

↩️ Reply

👤

Monica Ahuja

10:04 PM

Hi all, we have a case for below customer's reward level. Can someone help?

<https://businesscentral.dynamics.com/72b3ea3a-612a-4c9b-a791-8fa15c3df891/BCTechDaysSandbox/?company=CRONUS%20UK%20Ltd.&bookmark=21%3bEgAAAAJ7BTEAMAAwADAAMA%3d%3d&page=21>

🔗 Business Central

⋮

Adatum Corporation

Customer Card

No.:

10000

Balance (LCY):

0

Contact Name:

Robert Townes

Balance Due (LCY):

0

Reward ID:

SILVER

Details

EK

Evgenij Korovin

10:07 PM

Yes I am going to take a look!

Reply

✍️

📎

😊

GIF

🗨️

📁

📺

➡️

💡

🔄

👍

📄

⋮

➤

📝 New conversation

General (BcTechDaysDemo) | MikBusiness Manager - Dynamics 365My files - OneDrive

https://businesscentral.dynamics.com/BCTechDaysSandbox

Dynamics 365 Business Central

Environment: BCTechDaysSandbox

CRONUS UK Ltd.

FinanceCash ManagementSalesPurchasingShopify

CustomersVendorsItemsBank AccountsChart of AccountsCustomer - Sales List


This is a sandbox environment for test, demo, or development purposes only. Don't show this again.

Get started

Hi, meet Business Central!

You're all set to try out our demo company, Cronus. Go explore on your own, or take a quick tour first.

Show demo tours



Some features connect to other Microsoft services

Activities

Sales This Month

£1,237

> See more

Overdue Sales Invoice Amount

£39,754

> See more

Overdue Purch. Invoice Amount

£35,196

> See more

Sales Invoices Predicted Overdue

0

> See more

Ongoing Sales

Sales Quotes

2

>

Sales Orders

4

>

Sales Invoices

7

>

Ongoing Purchases

Purchase Orders

5

>

Ongoing Purch. Invoices

3

>

Purch. Invoices Next Week

0

>

Payments

Unprocessed Payments

1

>

Average Collection Days

5.8


>

Outstanding V. Invoices

13

>

Scan documents



Create Incoming from Camera

Evgenij checks Teams...

analysis with Organizational Data Types

General (BcTechDaysDemo) | MikBusiness Manager - Dynamics 365Customer - Sales List.xlsxMy files - OneDrive

https://businesscentral.dynamics.com/BCTechDaysSandbox

Environment: BCTechDaysSandbox

CRONUS UK Ltd. | FinanceCash ManagementSalesPurchasingShopify

CustomersVendorsItemsBank AccountsChart of AccountsCustomer - Sales List

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Scan documents

Create Incoming from Camera

Monica checks Outlook...

Sam checks Teams...

General (BcTechDaysDemo) | Microsoft Teams

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Microsoft Teams

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Teams

Your teams

BcTechDaysDemo

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Developers channel

Support Cases

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Customers

New

Adatum Corpo...

New

+

Meet

← Reply

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Business Central

Adatum Corporation

Customer Card



No.: 10000

Balance (LCY): 0

Contact Name: Robert Townes

Balance Due (LCY): 0

Reward ID: SILVER

Details

▼ Collapse all

EK Evgenij Korovin 10:07 PM

Yes I am going to take a look!

Monica Ahuja 10:39 PM

Thanks for the analysis I have updated the level.

Sam van Lieshout can you please send the gold welcome letter 🙏

Sam van Lieshout 10:48 PM

Thanks Monica, I have sent the welcome letter!

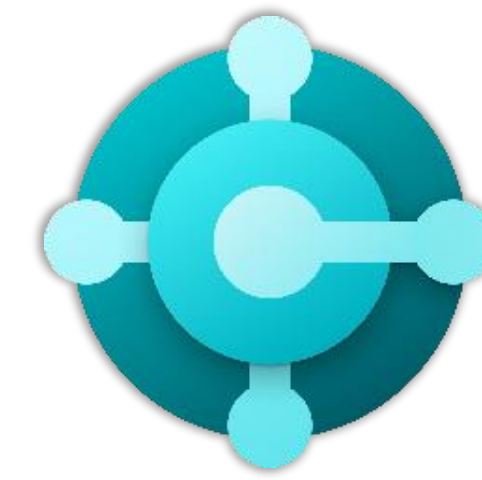
Reply

🔗 📎 😊 🗒️ 🗨️ 📧 📺 📌 🔄 📄 📁 ...

New conversation

Join or create a team

What you just saw in action with



- Collaboration in Teams
- Extend Adaptive Cards



- Create and use Excel report layouts
- Design and use Organizational Types



- Share deeplinks



- Create share actions
- Administrate setup

Developer extensibility for a Teams card

Developer extensibility for a Teams card

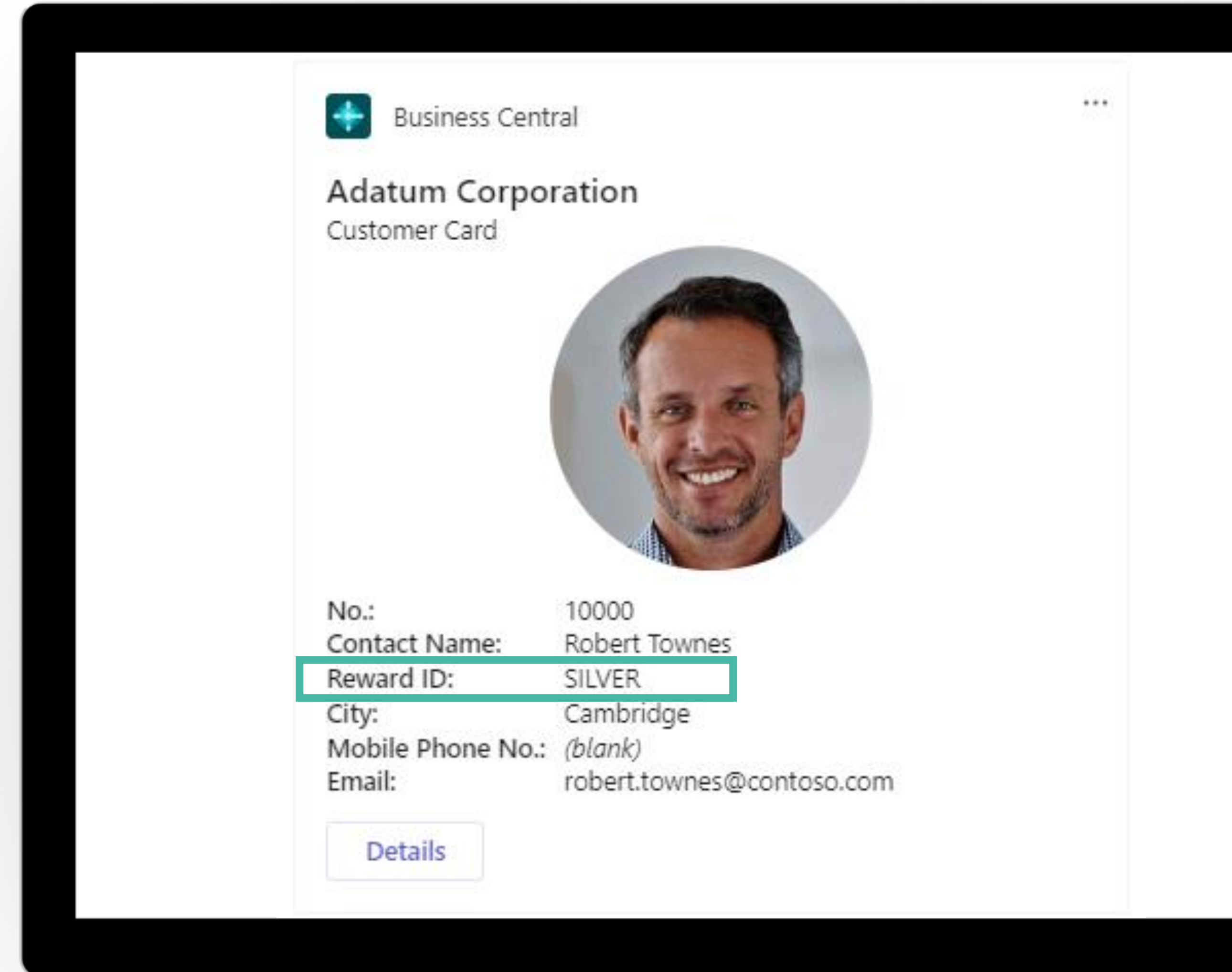
Extend adaptive cards for existing and your own entities

Full control on the final fields

How? Here are your extensibility options:

Metadata (e.g. Brick Field Group)

AL events



Demo 1: Using Brick Field Group for custom and base entities

Option 2: Extensibility using AL events

- **OnBeforeGetPageSummary**
 - Recommended for overriding all data for a card
 - Platform will not attempt to select any list of fields or their corresponding
- **OnAfterGetSummaryFields**
 - Recommended for specifying a custom set of fields from the same table
 - Platform will fetch the corresponding values from the current record
- **OnAfterGetPageSummary**
 - Recommended for overriding fields and their values selected by the platform.
- Part of the Page Summary Provider module of the System Application.

Demo 2: Using AL event: OnAfterGetSummaryFields

Developers channel (BcTechDays)

Edit - Customer Card - Dynamics

https://teams.microsoft.com/_#/conversations/Developers%20channel?threadId=19:7f3c77cb74f74231a88875c33f00b20d@thread.tacv2&ctx=channel

Sign in

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Chat

Teams

Calendar

Calls

Files

Apps

Help

Teams

Your teams

B

BcTechDaysDemo

...

General

Developers channel

Support Cases

C

Contoso

...

General

Test BC

B

Developers channel

Posts

Files

+

Let's get the conversation started

Try @mentioning people you want to collaborate with, or add some tabs to customize your space.

Polly

Freeha...

Kahoot!

Add tab

👍

❤️

😄

😮

😬

😬

😬

...

Monica Ahuja

Yesterday 5:04 PM

Edited

Hi

Here is the default customer card without any extension.

Edit - Customer Card - Dynamics 365 Business Central

Business Central

...

Adatum Corporation

Customer Card

No.: 10000

Balance (LCY): 0

Contact Name: Robert Townes

Balance Due (LCY): 0

Details

Reply

New conversation

ENG UK

11:41

15/09/2022

Summary

- Pin a tab in Teams coming soon!
- Full control on the final fields of Teams card
- In most cases – metadata is enough!
- Using Brick field group is recommended
- External data via custom entities can be easily brought to Teams card
- Developer testing in sandbox (not Docker)
- Deploy the app to your users with centralized deployment setup



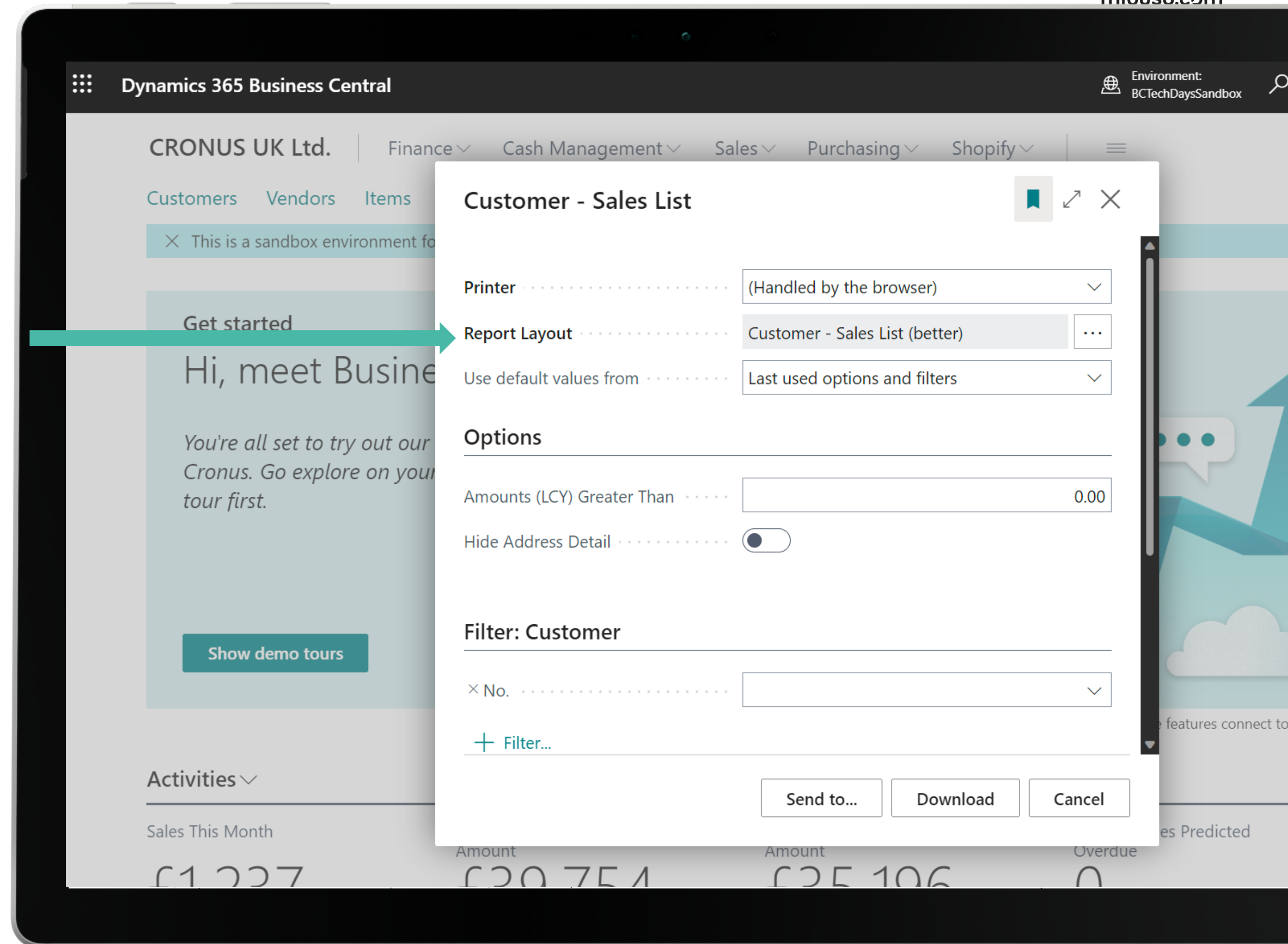
See documentation here:

<https://go.microsoft.com/fwlink/?linkid=2158242>



Excel layouts

- Exports report data to Excel worksheet as tabular data
- Import and applying any layout for future reports
- On Report Request Page, choose layout dynamically (coming this Fall)



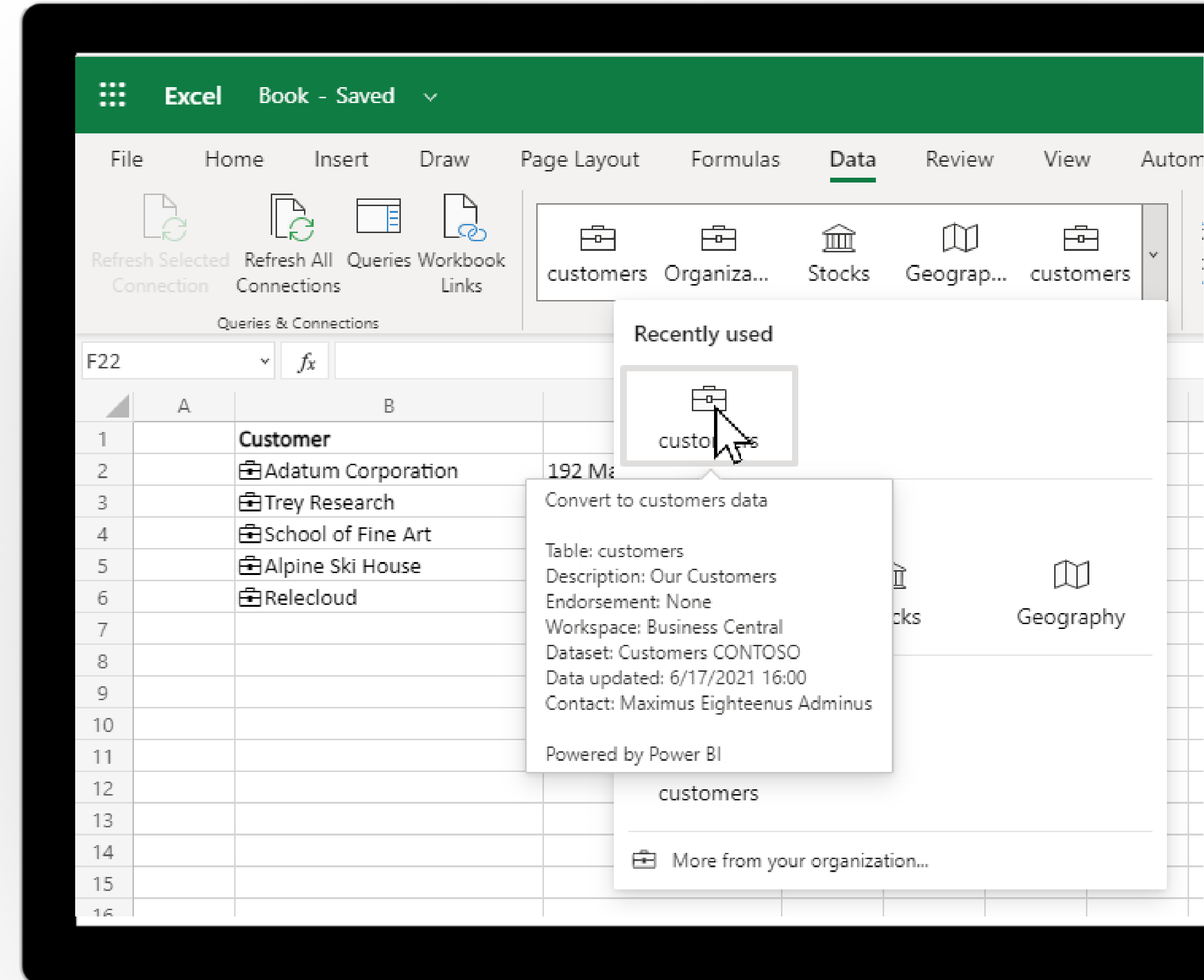
Summary

- Use Excel layouts now
- See samples at [GitHub.com/Microsoft/BCTech](https://github.com/Microsoft/BCTech)
- Read community blogs

```
CustomerSalesList.Report.al X
CustomerSalesList.Report.al > ...
0 references
1 report 50200 "Customer - Sales List (better)"
2 {
3     ... ApplicationArea = All;
4     ... Caption = 'Customer - Sales List (better)';
5     ... UsageCategory = ReportsAndAnalysis;
6     ... DefaultLayout = Excel;
7
8     - reference
9     ... ExcelLayout = './layouts/CustomerSalesList.xlsx';
10 }
```


Excel Organization Data Types from BC

- Powered by custom APIs
- Available to users via Power BI
- Can be shared
- Easy to get started



FileHomeHelp

Paste

Copy

Get data
Connect to data from multiple sources.

Excel workbook

Data hub

SQL Server

Enter data

Data source

Recent sources

Transform data

Refresh

Manage relationships

Manage roles

View as

Q&A setup

Language

Linguistic schema

Sensitivity

Publish

All tables

Properties

Cards

Show the database in the header when applicable

No

Show related fields when card is collapsed

Yes

Pin related fields to top of card

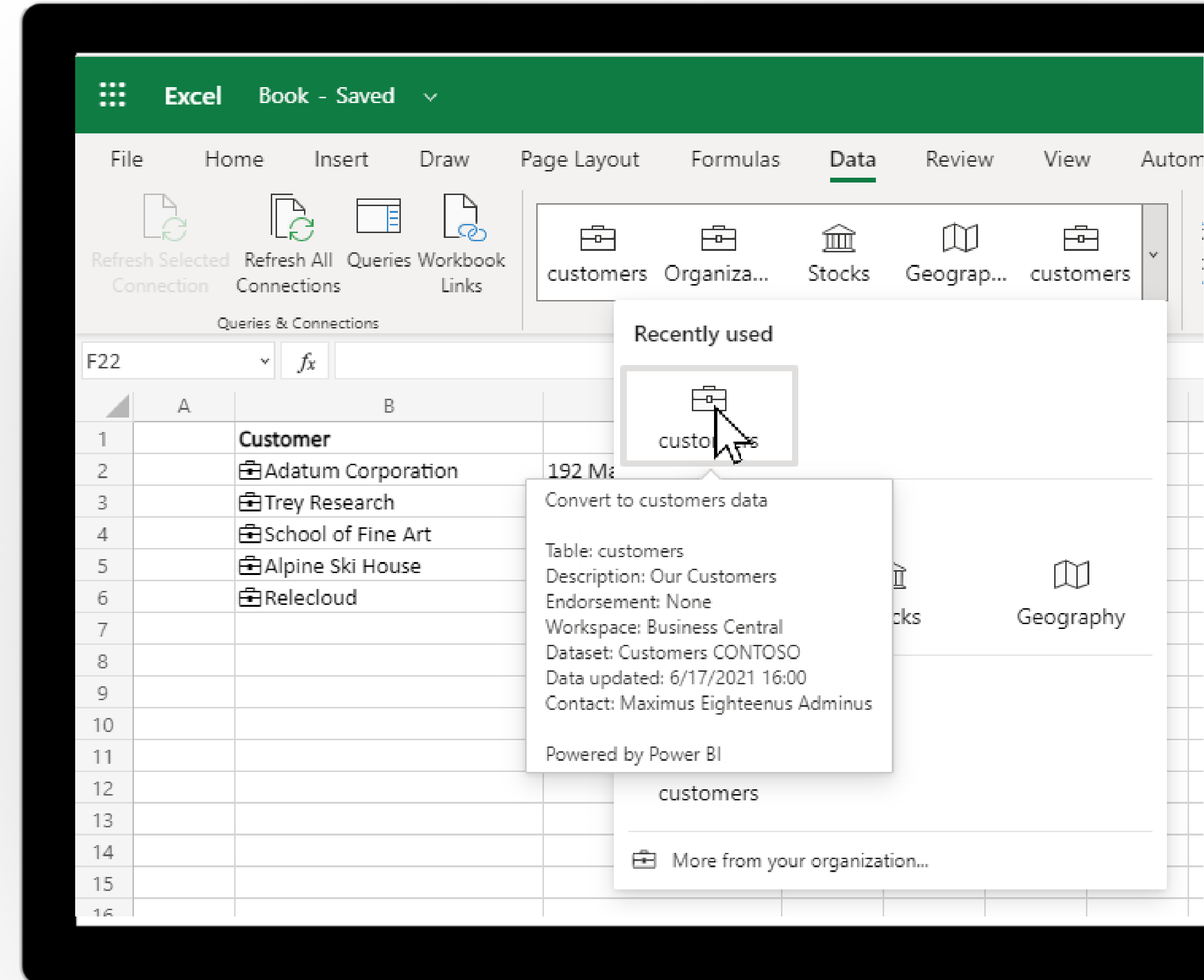
No

Fields

Search

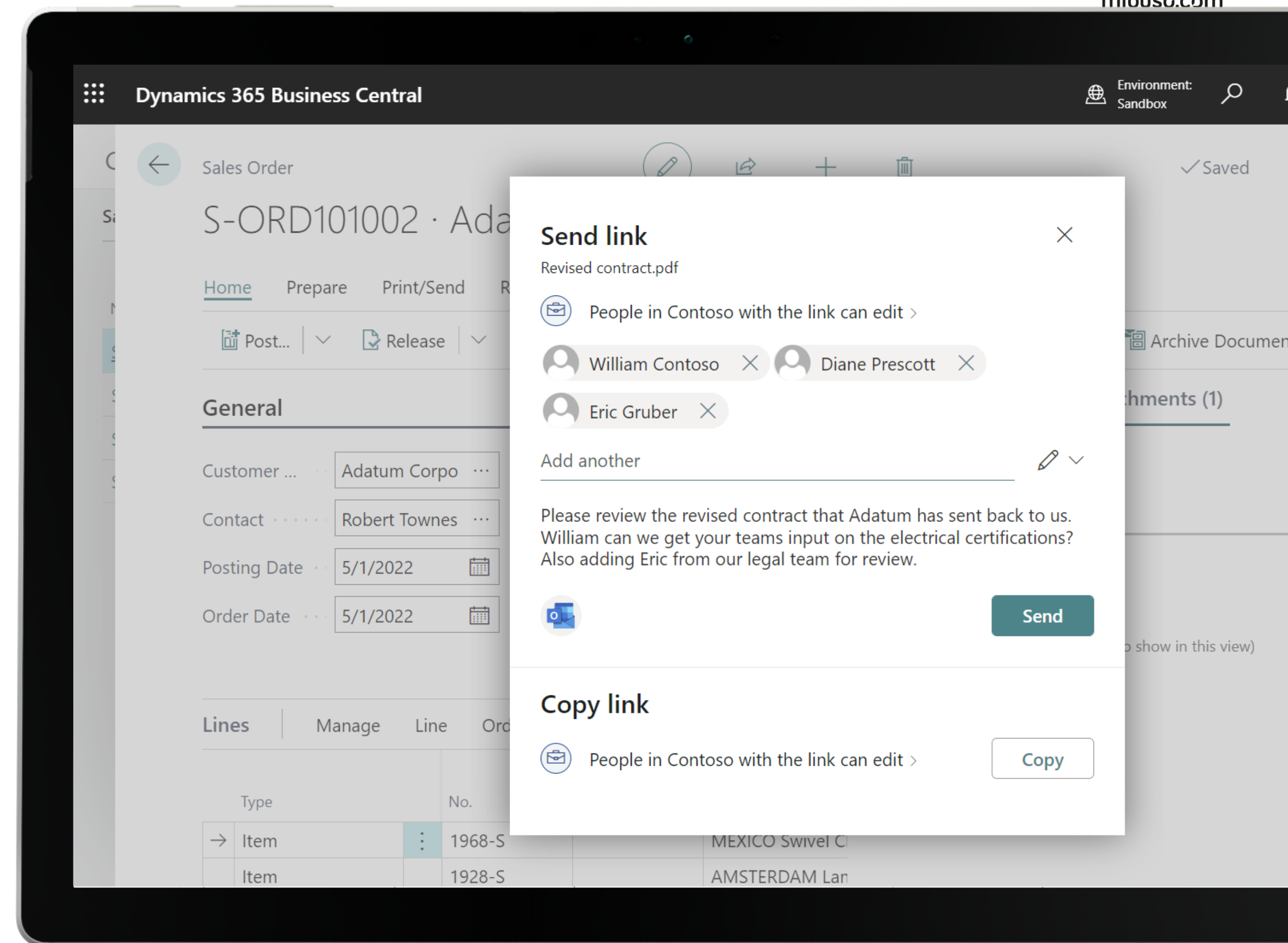
Summary

- Built in Excel data types expand with ones defined by you for your organization
- Based on shared Power BI dataset and “featured” tables (needs PRO license)
- Ideal for reference data: items, customers etc
- Works for on-premises and cloud



Share files

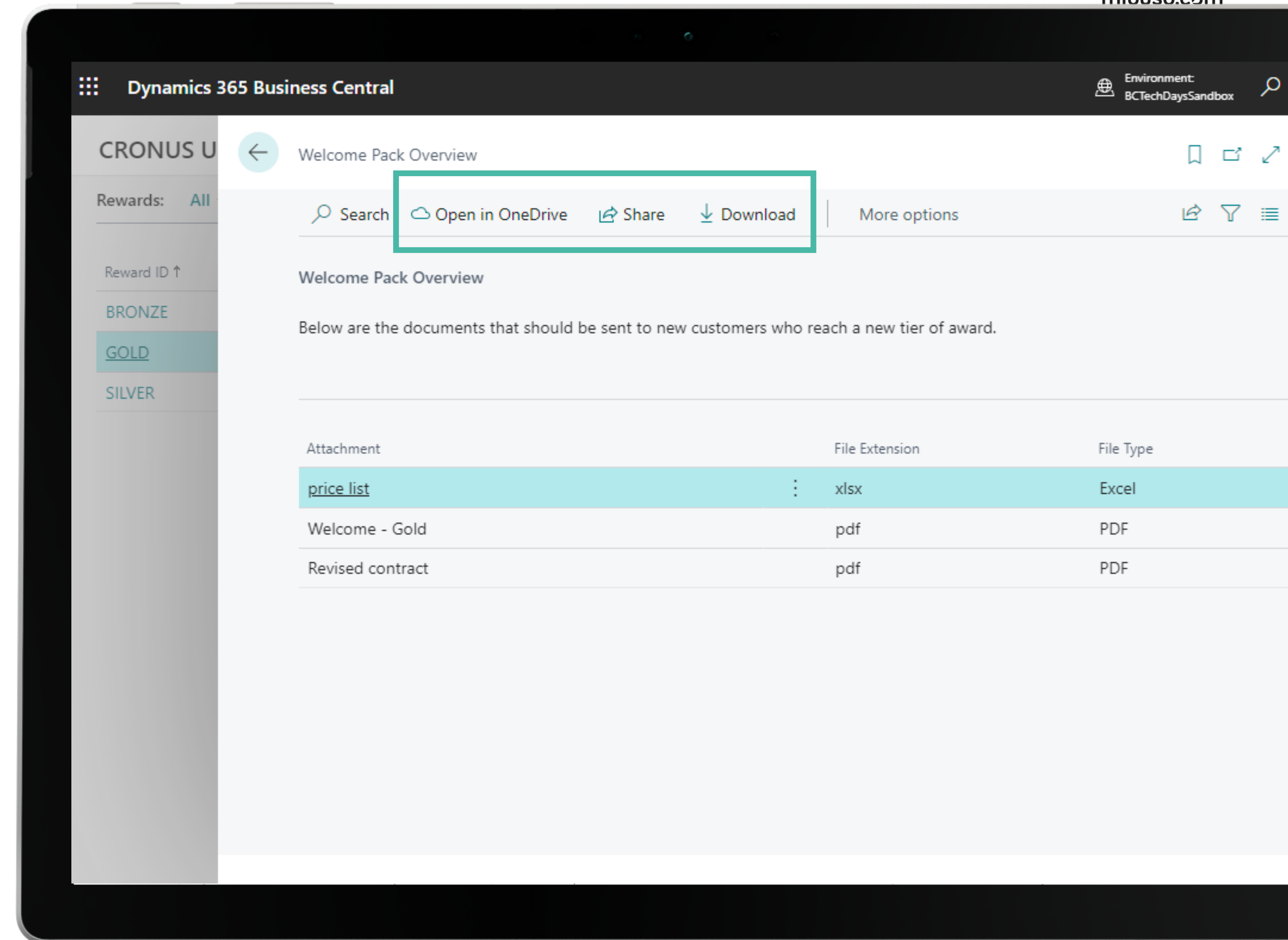
- Familiar file sharing experience in the client
- Copies the file to OneDrive for Business before presenting share options
- Email a link, copy a link, adjust link settings
- Saves to company specific folder



Developer experience

Design considerations

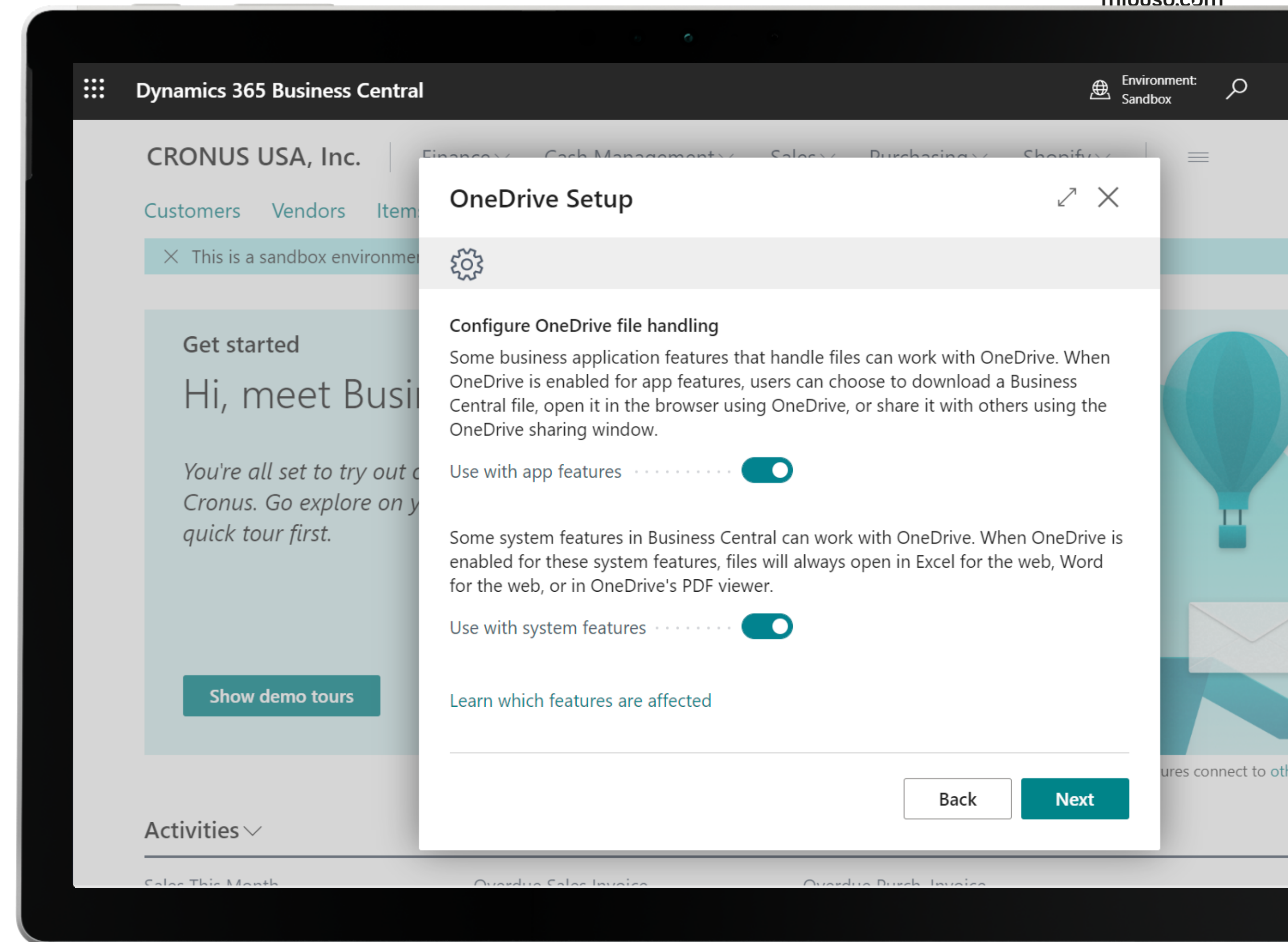
- Apply the Share-Open-Download pattern for consistent look and feel across file-handling actions
- See existing actions as a starting point
- Supports any AL data stream/file format



Admin experience

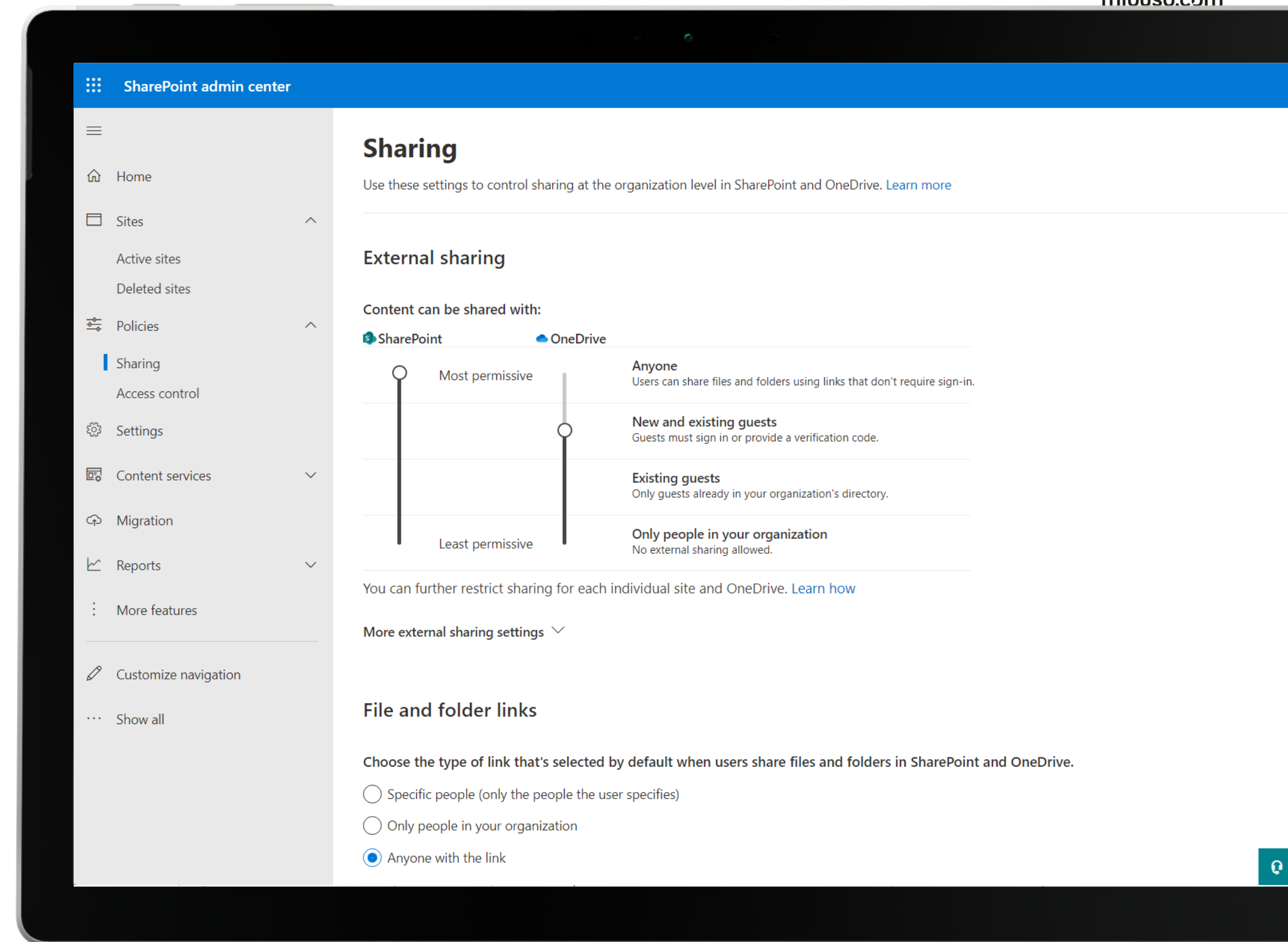
OneDrive administration

- Admins manage file handling from Business Central
- Applies across the current environment
- Opportunity to enable application or system features independently
- Setup controlled by permissions
- Migration overview shown during setup if moving from a legacy configuration



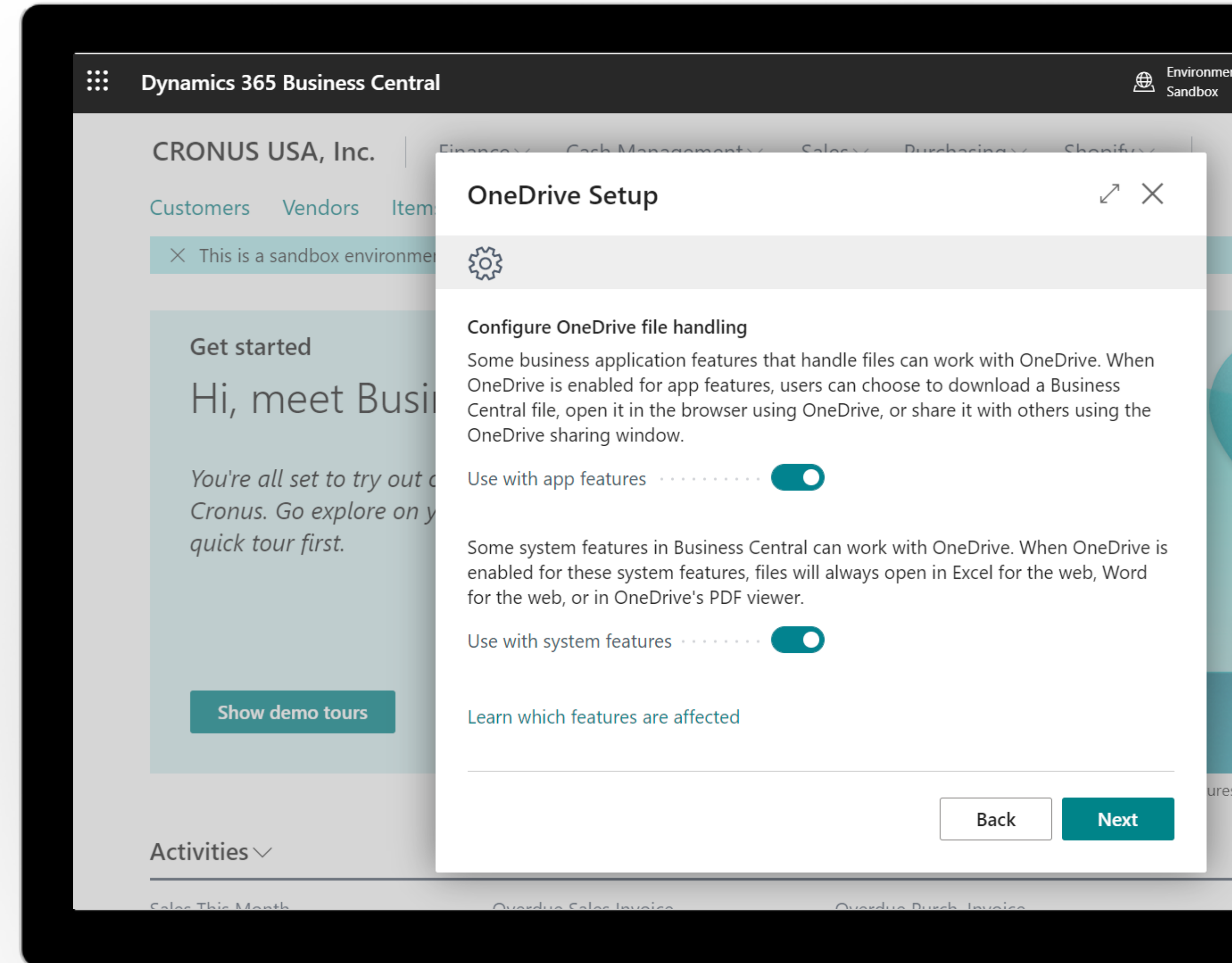
Sharing administration

- File sharing managed through SharePoint admin center
- Set policies governing external sharing, link expiration, and more
- Same policy, shared across Office apps and Business Central

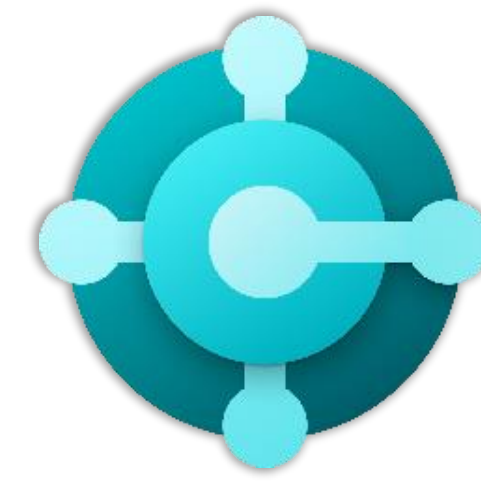


Summary: OneDrive

- Extend your download scenarios with Open/Share actions
- Run the OneDrive wizard to enable integrations for System features



Summary: More collaboration with



- Collaboration in Teams
- Extend Adaptive Cards



- Create and use Excel report layouts
- Design and use Organizational Types



- Share deeplinks



- Create share actions
- Administrate setup

Thank
You!



Any Questions?