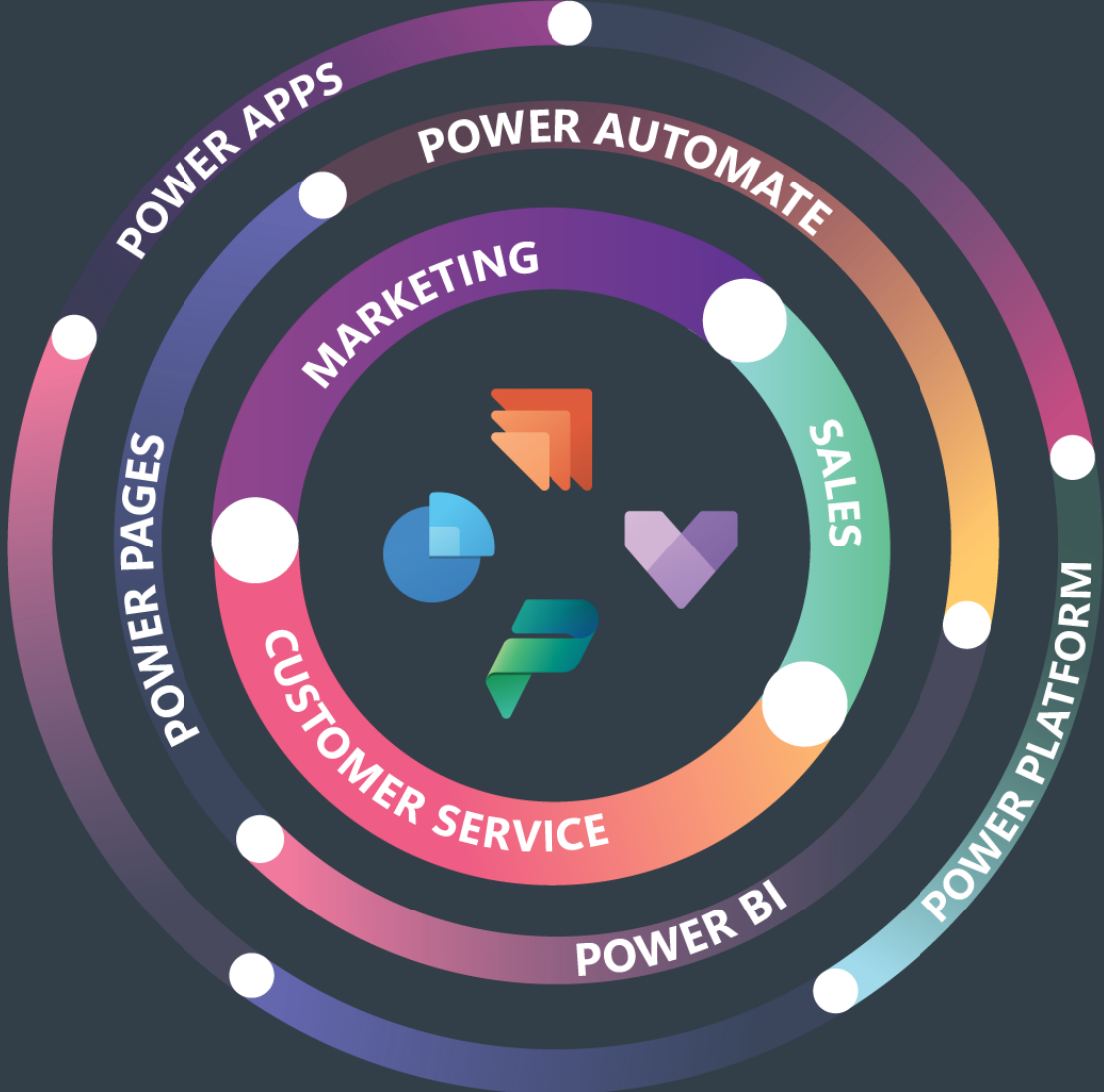


CRM connect

Explore the Power & Creativity of Canvas Apps





Can you hear me?



Is everything clear?



~ 45 mins



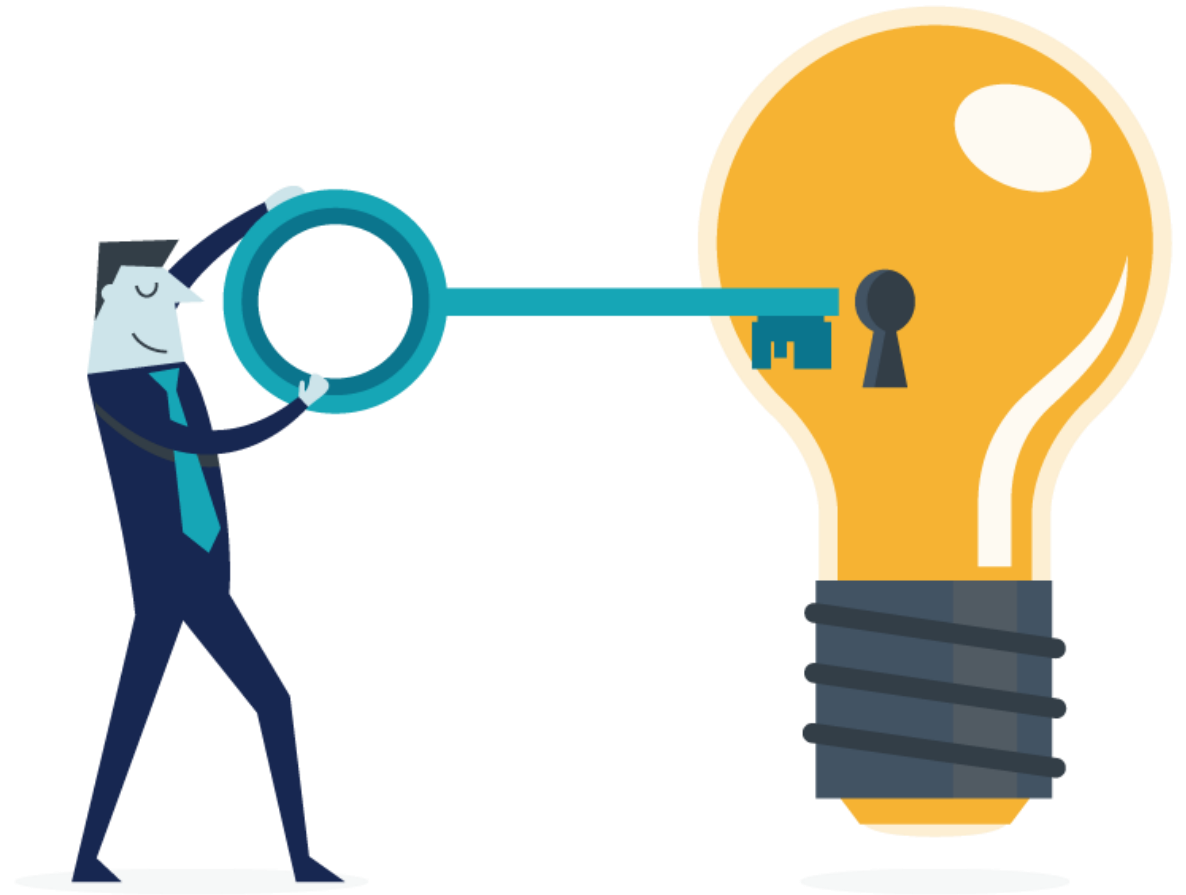
Q & A



Hi!
Colin and Kelly

What we'll cover

- Use Cases
- Data Sources
- Design Basics
- Let's take a look at an Example
- Not just a pretty face 😊
- Where to start?





Use Cases

- Employee Self Service
- External Sales (Your Team)
- Product Catalogues
- Warehouse Packing Processes
- Proof of Delivery
- Visitor System
- Vehicle Check App

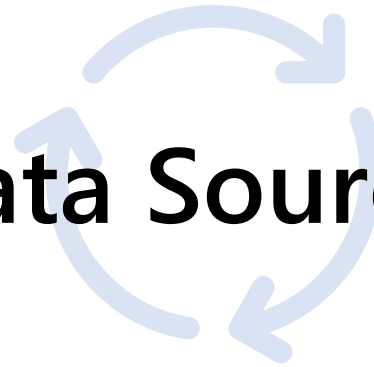


Dataverse



Microsoft Dynamics 365
Business Central

Data Sources



SharePoint

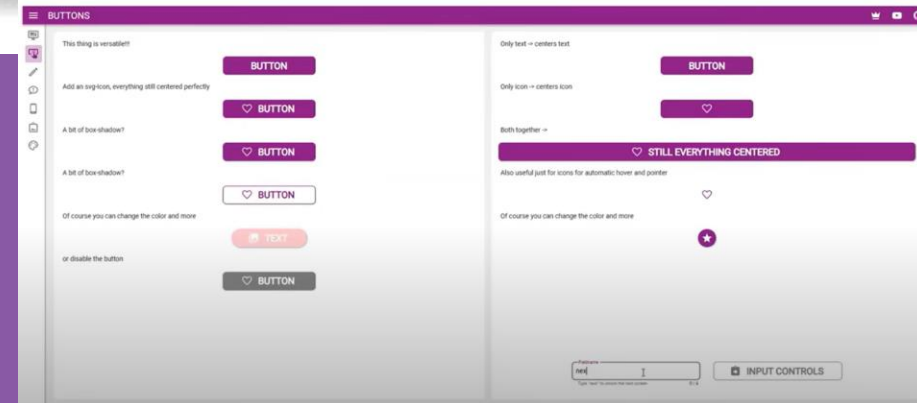
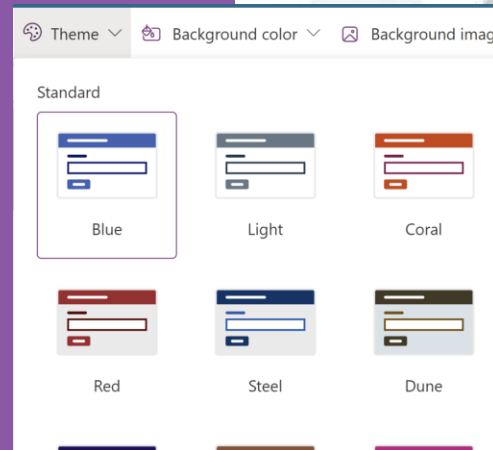


Microsoft Teams

& More...

Design Capability

- Responsive Design
- Containers
- Themes
- Modern Controls
- Material Design





Let's take a look!!!



Hello Colin Bell, Welcome to your appointments Screen for Tuesday 23 April 2024



Please Select the Date to View your Appointments

Tue, Apr 23, 2024



Appointment: Stock Review

Start: 23/04/2024 11:30

23/04/2024 12:30

Archies Gift Shop



Appointment: Stock Review

Start: 23/04/2024 11:30

23/04/2024 14:00

Puzzleforall





Hello Colin Bell, Welcome to the Scan and Order Screen for Archies Gift Shop



Scan Product Barcode

Product ID

Item Name

Inventory Level



Add to Order

Total Line Items	Total Quantity	Total
------------------	----------------	-------

0		
---	--	--

Clear Line Items

Process Order



Hello Colin Bell, Welcome to the Scan and Order Screen for Archies Gift Shop



Scan Product Barcode

Product ID

1001

Item Name

Dog Jigsaw Puzzle - 250 pcs

Inventory Level

3,913



Add to Order

Total Line Items	Total Quantity	Total
0		

Clear Line Items

Process Order



Hello Colin Bell, Welcome to the Scan and Order Screen for Archies Gift Shop



Scan Product Barcode

Product ID

1001

Item Name

Dog Jigsaw Puzzle - 250 pcs

Inventory Level

3,913



Add to Order

Product Name	Purchase Quantity
Dog Jigsaw Puzzle - 250 pcs	1
Product Number	Unit Price
1001	£5.35
Sub-Total	£5.35

Total Line Items	Total Quantity	Total
1	1	£5.35

Clear Line Items

Process Order



Hello Colin Bell, Welcome to the Scan and Order Screen for Archies Gift Shop



Scan Product Barcode

Product ID

1001

Item Name

Dog Jigsaw Puzzle - 250 pcs

Inventory Level

3,913



Add to Order

Product Name	Purchase Quantity
Dog Jigsaw Puzzle - 250 pcs	100
Product Number	Unit Price
1001	£5.35
Sub-Total	£535.00

Total Line Items	Total Quantity	Total
1	100	£535.00

Clear Line Items

Process Order





Hello Colin Bell, Welcome to the Scan and Order Screen for Archies Gift Shop



Scan Product Barcode

Product ID

1001

Item Name

Dog Jigsaw Puzzle - 250 pcs

Inventory Level

3,913



Add to Order

Product Name	Purchase Quantity
Dog Jigsaw Puzzle - 250 pcs	100
Product Number	Unit Price
1001	£5.35
Sub-Total	£535.00

Order Placement Confirmation

Confirm you want to process this order?

Cancel

Confirm

Total Line Items	Total Quantity	Total
1	100	£535.00

Clear Line Items

Process Order



Hello Colin Bell, Congratulations!! Your Order for Archies Gift Shop has been processed.



Product Name: Dog Jigsaw Puzzle - 250 pcs

Quantity: 100

Unit Price: £5.35

Sub-Total: £535

Total Line Items	1	Total Quantity	100	Total	£535.00	Share
-------------------------	---	-----------------------	-----	--------------	---------	--------------



Business Central

SO001122 · Archies Gift Shop

[Home](#)
[Prepare](#)
[Print/Send](#)
[Request Approval](#)
[Order](#)
[Report](#)
[Synchronise](#)

[Actions](#)
[Related](#)
[Automate](#)
[Fewer options](#)

[Post...](#)
[Release](#)
[Credit Control](#)
[Create Warehouse Shipment](#)
[Create Inventory Put-away/Pick...](#)
[Archive Document](#)

General Show more

Customer Name	Archies Gift Shop	VAT Date	23/04/2024	External Document No.	
Contact	Harry Arch	Order Date	23/04/2024	Status	Open
Document Date	23/04/2024	Due Date	14/05/2024	Credit Status	
Posting Date	23/04/2024	Requested Delivery Date			

Lines ↗ ↖

[New Line](#)
[Delete Line](#)
[Select items...](#)
[Suggest sales lines](#)
⚙

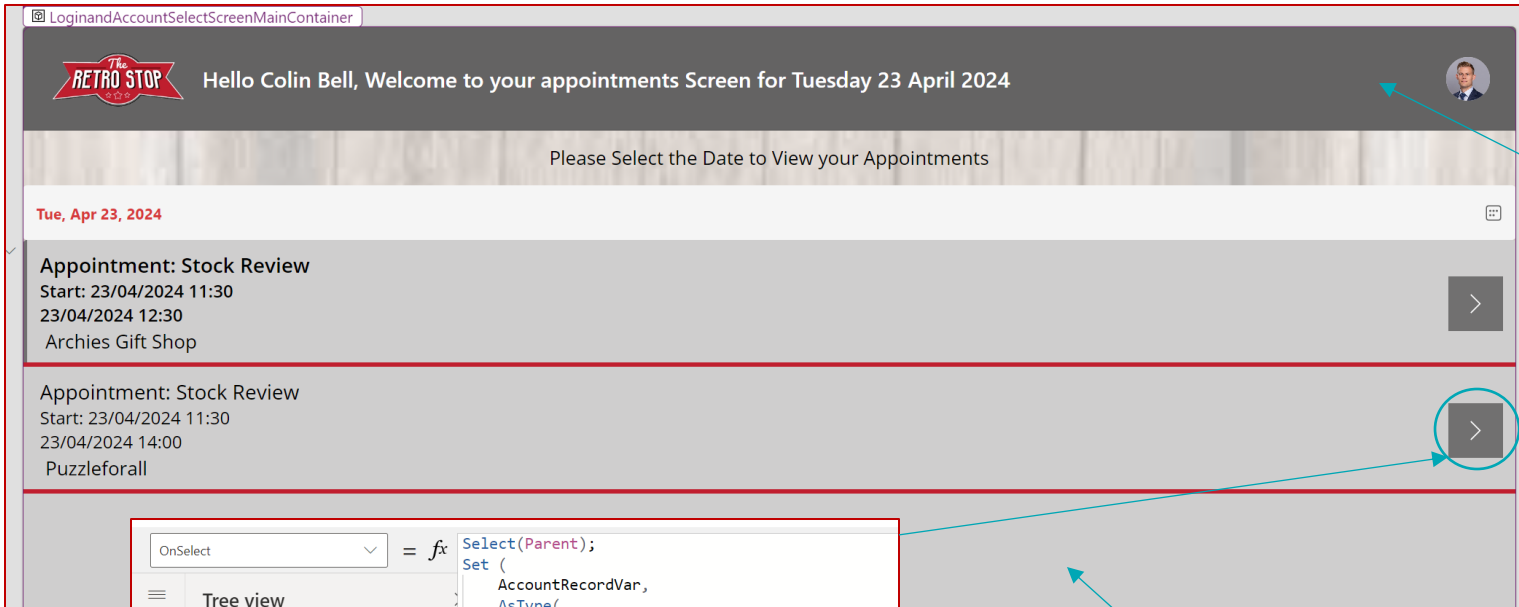
Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship	Quantity Shipped	Qty. to
→ Item	1001		Dog Jigsaw Puzzle - 250 pcs	BIR	100		-	PCS	5.35		535.00		-	

Subtotal Excl. VAT (GBP)	535.00	Invoice Discount %	0	Total VAT (GBP)	107.00
Inv. Discount Amount Excl. VAT (G...)	0.00	Total Excl. VAT (GBP)	535.00	Total Incl. VAT (GBP)	642.00



Not Just a Pretty Face

Some of the complexities used



Dynamically set the Header to include the Individual User details and Dates

```
Title = fx Concatenate(
    "Hello " & UserVar.'Full Name' & ", Welcome to your appointments Screen for ",
    Text(
        DatePickerLoginScreen.SelectedDate,
        "dddd dd mmmm yyyy"
    )
)
```

```
OnSelect = fx Select(Parent);
Set (
    AccountRecordVar,
    AsType(
        ThisItem.Regarding,
        Accounts
    )
);
Navigate(
    ScanandOrderProcessingScreen,
    Transition.None
)
```

Connects to CRM Appointments using the Dataverse and displays in the Canvas App

```
Items = fx Filter(
    Appointments,
    DatePickerLoginScreen.SelectedDate = DateValue('Start Time') && AsType(
        Owner,
        Users
    ).User = UserVar.User
)
```

Account details pulled from CRM using Variables to ensure only relevant data is accessed.

Continued...

```
OnScan = fx {
  Set(
    ItemCodeVar,
    First(BarcodeReader1.Barcodes).Value
  );
  ClearCollect(
    ItemRecordCollection,
    {
      Number: LookUp(
        'items (v2.0)',
        GTIN = ItemCodeVar
      ).'No.',
      Name: LookUp(
        'items (v2.0)',
        GTIN = ItemCodeVar
      ).'Display Name',
      Inventory: LookUp(
        'items (v2.0)',
        GTIN = ItemCodeVar
      ).Inventory,
      Price: LookUp(
        'items (v2.0)',
        GTIN = ItemCodeVar
      ).'Unit Price',
      GUID: LookUp(
        'items (v2.0)',
        GTIN = ItemCodeVar
      ).Id
    }
  );
}
```

Allows you to scan a product Barcode from your device and returns the Stock information from Business Central

```
OnSelectOK = fx {
  Set(
    ordernumbervar,
    Patch(
      'salesOrders (v2.0)',
      Defaults('salesOrders (v2.0)'),
      {'Customer No.': AccountRecordVar.'Account Number'}
    ).Id
  );
  ForAll(
    orderlinecollection,
    Patch(
      'salesOrderLines (v2.0)',
      Defaults('salesOrderLines (v2.0)'),
      {
        'Document Id': ordernumbervar,
        'Item Id': ThisRecord.ItemID,
        Quantity: ThisRecord.Quantity,
        'Line Type': "Item",
        'Unit Price': ThisRecord.Price
      }
    )
  );
  Navigate(
    OrderConfirmation,
    ScreenTransition.Fade
  );
  UpdateContext({locShowPopUpMenu: false});
}
```

Product Name Purchase Quantity

Dog Jigsaw Puzzle - 250 pcs	100
Product Number	Unit Price
1001	£5.35
Sub-Total	£535.00

Product ID: 1001
Item Name: Dog Jigsaw Puzzle - 250 pcs
Inventory Level: 3,913

Order Placement Confirmation
Confirm you want to process this order?

Cancel Confirm

Total Line Items Total Quantity Total

1	100	£535.00
---	-----	---------

Clear Line Items Process Order

```
OnSelect = fx {
  Collect(
    orderlinecollection,
    {
      Number: First(ItemRecordCollection).Number,
      Quantity: 1,
      Price: First(ItemRecordCollection).Price,
      Product: First(ItemRecordCollection).Name,
      ItemID: First(ItemRecordCollection).GUID
    }
  );
}
```

Combination of Patch, Variable and Line-Item collection to pull the Final Order into Business Central for Invoice processing

“Collect” allows Data from Business central to be pushed into the Line Item



Co-Pilot is here to help!

Power Apps

Environment: TecMan BC CRM NB Ev...

Create an app

Here's a table for your app

Why a table? Because when you see your app in a moment, the data in this table is what you'll see on the screen. There will also be a form that your users can fill out to add information to the table.

Need anything changed?
Just tell Copilot what you need, and it will make the changes for you.

Suggestions

- Change ... to ...
- Add a column for ...
- Add a row for ...
- Remove the ... row.
- Change the data type for the ... column to ...
- Refresh the data.
- Give me suggestions.

Cancel

Product Catalogue

Product ID	Product Name	Category	Price	Quantity	Description	Cost Price
P001	iPhone 12	Electronics	999.00	10	The latest iPhone model	800.00
P002	T-shirt	Clothing	20.00	50	Cotton t-shirt in various colors	10.00
P003	Sofa	Home	500.00	2	Comfortable sofa for your living r...	400.00
P004	Lipstick	Beauty	15.00	20	Long-lasting lipstick in vibrant sha...	10.00
P005	Notebook	Other	5.00	100	Plain notebook for writing and dr...	3.00

Copilot

Build a Product Catalogue App with item details from Business Central

Here is a table for Product Catalogue
AI-generated content may be incorrect

Add a Cost price column

The Product Catalogue table has been updated
AI-generated content may be incorrect

Describe what you want changed...

Make sure AI-generated content is accurate and appropriate before you use it. [See terms](#)

Create app

- Use plain English to ask Co-Pilot a question
- It will build your requirements based on your question
- When in the App you can ask more specific questions
- Co-Pilot is here to make life easier
- Co-Pilot is not SkyNet
- Have fun with it!

Next Steps

- Find your Use Cases
- Identify Your Data Sources
- Work on a Base Design Plan
- Give it a Go!
- Speak to your CEM if you get stuck!

What we covered

- Use Cases
- Data Sources
- Design Basics
- Let's take a look at an Example
- Not just a pretty face 😊
- Where to Start?



Any Questions?



Thanks!
Colin and Kelly

Thank you.

CRM
connect

THURSDAY 25 APRIL 2024

