

## Exercise - Create and test a mobile app

The goal of the lab exercise is to apply the knowledge you've gained regarding building and working with workspaces in Finance and Operations. The mobile app designer lets you select the specific data fields from forms that should appear in the mobile app.

### Create Mobile Workspaces

1. Ensure that **USMF** is selected as the Legal Entity.
2. Go to **Settings > Mobile app**.
3. Create a new workspace named **Customer Management**.
4. Specify the name of the workspace, an icon, and a color.
5. Add a page to the workspace.
6. Specify the name **Customers** to the page.
7. Specify the page description **Show all customers** to the page.
8. Select **Done**.
9. Expand the left menu on the dashboard to open **Accounts Receivable > Customer > All Customers** page.
10. In the **Manage Mobile app** page on the right, click **Select Fields** to select the data fields to add to the page.
11. On the **All Customers** page, on the header, select the **Account**, **Name**, and **Customer group** fields by selecting the yellow plus sign (+) that appears next to the fields.
12. Note that the fields are added in the order that you select them in. You can add fields from multiple forms, in any order.
13. When you've finished selecting fields, click **Done**.
14. Select **Back**.
15. Select **Done**.
16. Note the mobile app **Id**, **Name**, and **Description**.
17. Select **Save**.
18. Select **Publish** to make your mobile workspace available for use in Dynamics 365 Unified Operations.
19. Note your **organization ID** as it appears on the **Login** page URL (this is the URL that you will use to log in to Dynamics 365 for Finance and Operations).

### Install Dynamics 365 Unified Operations

1. Depending on your device, download the Dynamics 365 Unified Operations from either [iTunes App Store](#) or [Google Play Store](#).
2. When the download and install is finished, open the **Dynamics 365 Unified Operations Mobile App** on your device.
3. On the **Organization URL**, enter the URL saved in step 13 and select **Connect**. On the agreement page, select the **I agree** checkbox and select **Connect**.

4. Enter your credentials and select **Sign In**.

Use the Dynamics 365 Unified Operations for mobile app

1. On the **Home** page, notice that the published workspaces appear.
2. If it does not appear, you need to use pull-to-refresh to view the mobile workspace.
3. Notice the **Customer Engagement** workspace that you published.
4. Open the menu by clicking the menu icon on the top left. Select **Change Company**.
5. Search for and select **USMF** from the list of companies. Then, wait for the app home page to refresh.
6. Select **Customers**. The list of all customers will appear.
7. Pull the menu of features to search from by using the top right icon.
8. Notice that these are the same fields that you selected to be included in the app.