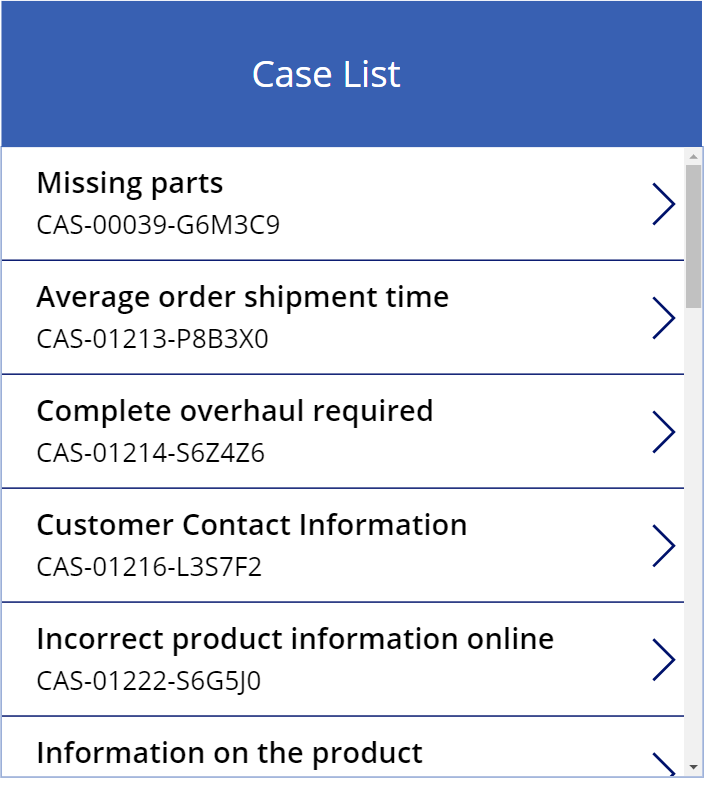
Case Survey Canvas App

Summary:

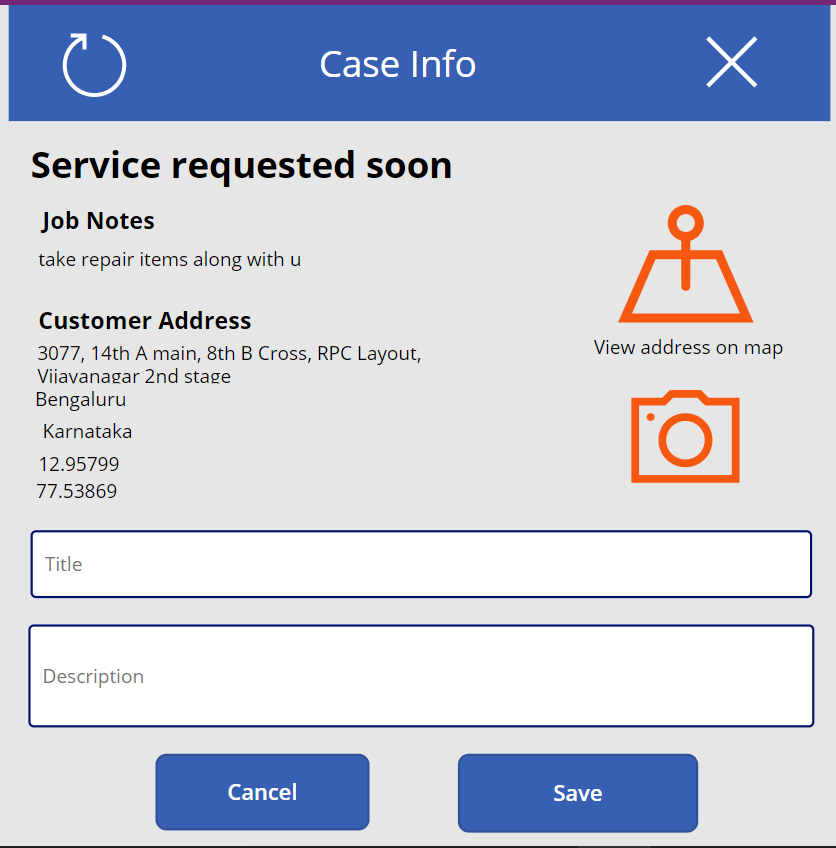
Cases which are present in the Dynamics will be displayed in the canvas app as list using which a field surveyor can select a particular case and have a look at the related information like case details, job notes, customer address and address location on map. During inspection surveyor can take pictures of the item on study and submit the image along with other details back to the Dynamics where in a note record will be created under the case record.

Application Walk through

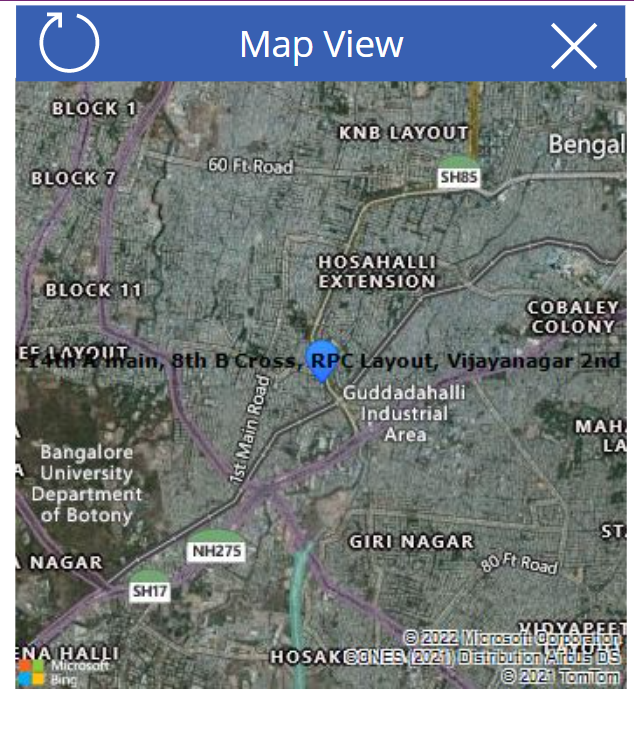
1. Cases are displaying in the list to select



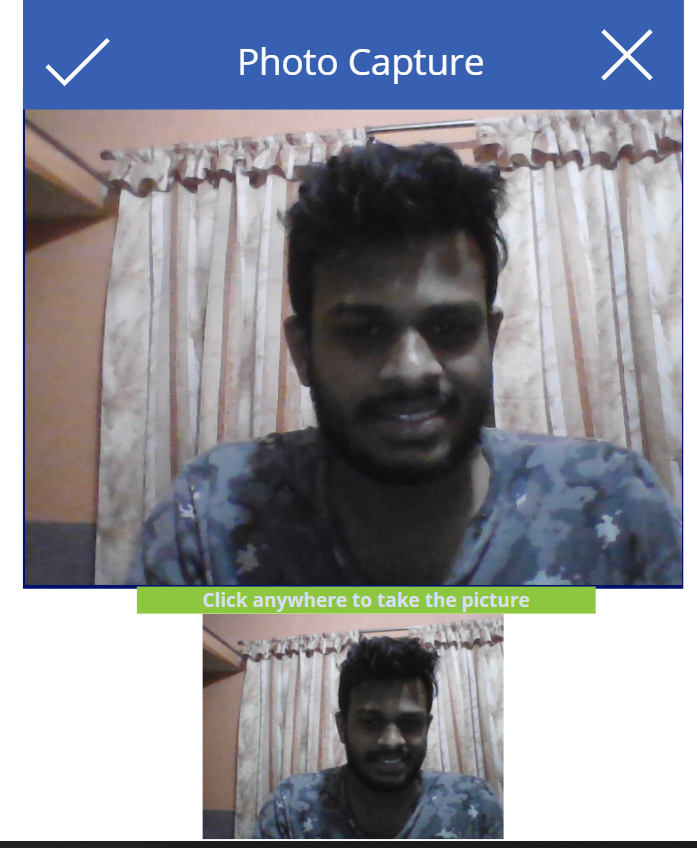
1. On selection of a particular case – case details screen open



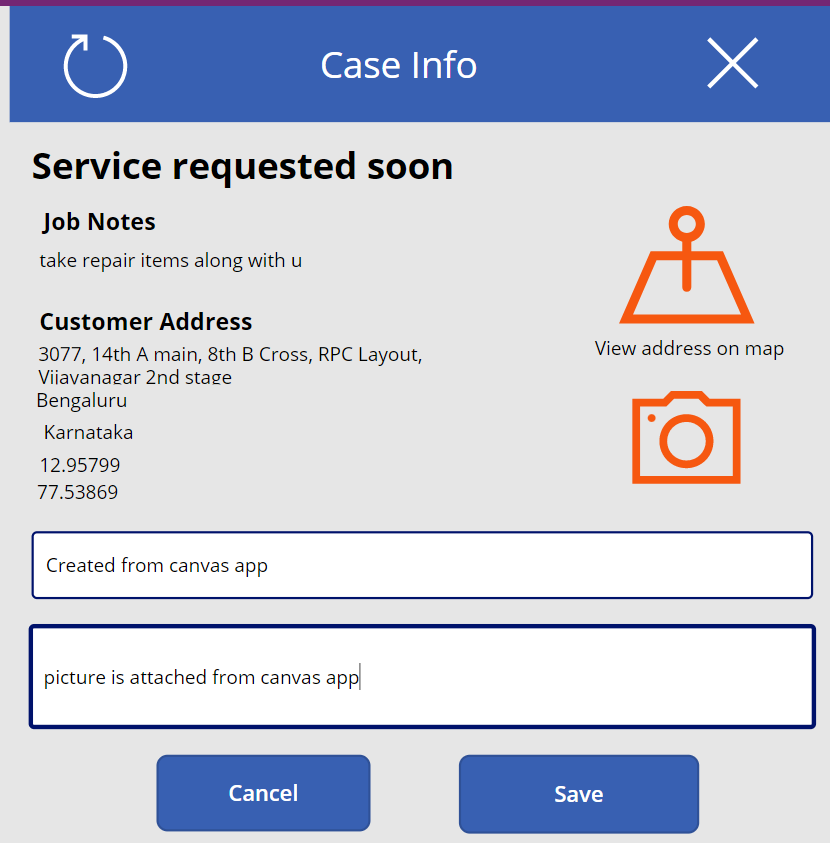
1. Screen contains below main items
2. Case title which was selected from the previous list
3. Job notes which gives instructions to the surveyor to perform on site
4. Customer address where the survey needs to be done
5. Map icon to navigate to the map view of the customer location pinned
6. To take the pictures of the survey site
7. Title for the notes to be created on the case record
8. Description for the notes to be created on the case record
9. Cancel button to reset the entered items
10. Save button to create a note record on the case along with the picture attachment.
11. On selection of map icon on the screen it will navigate to the map screen where the customer address will be pinned to the Bing map



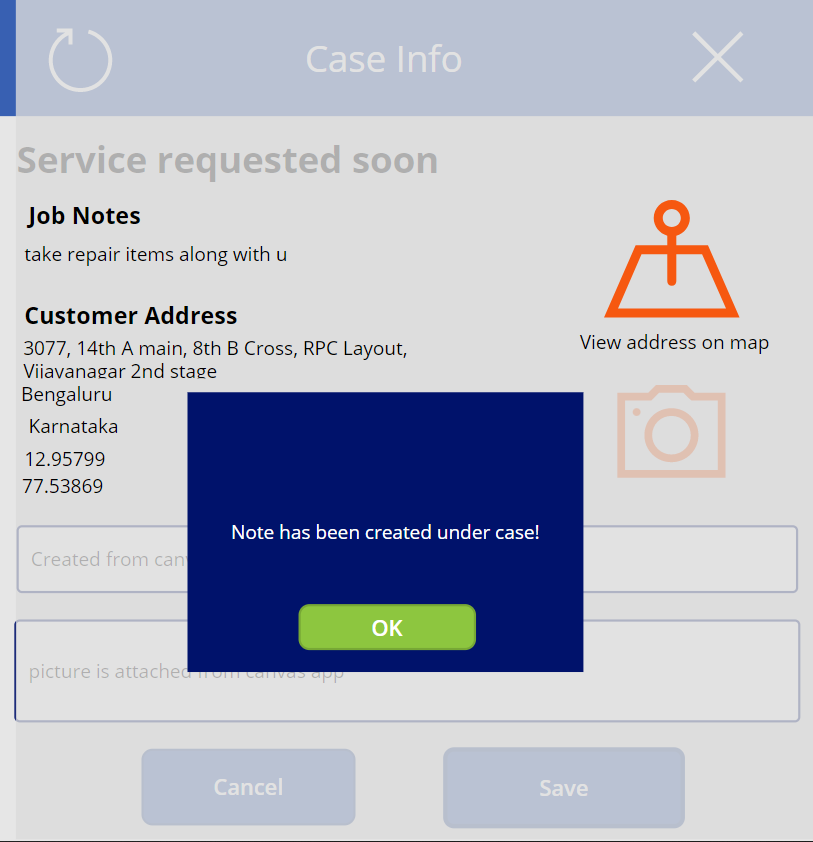
1. On selection of photo camera icon, the screen will navigate to the photo capture screen.



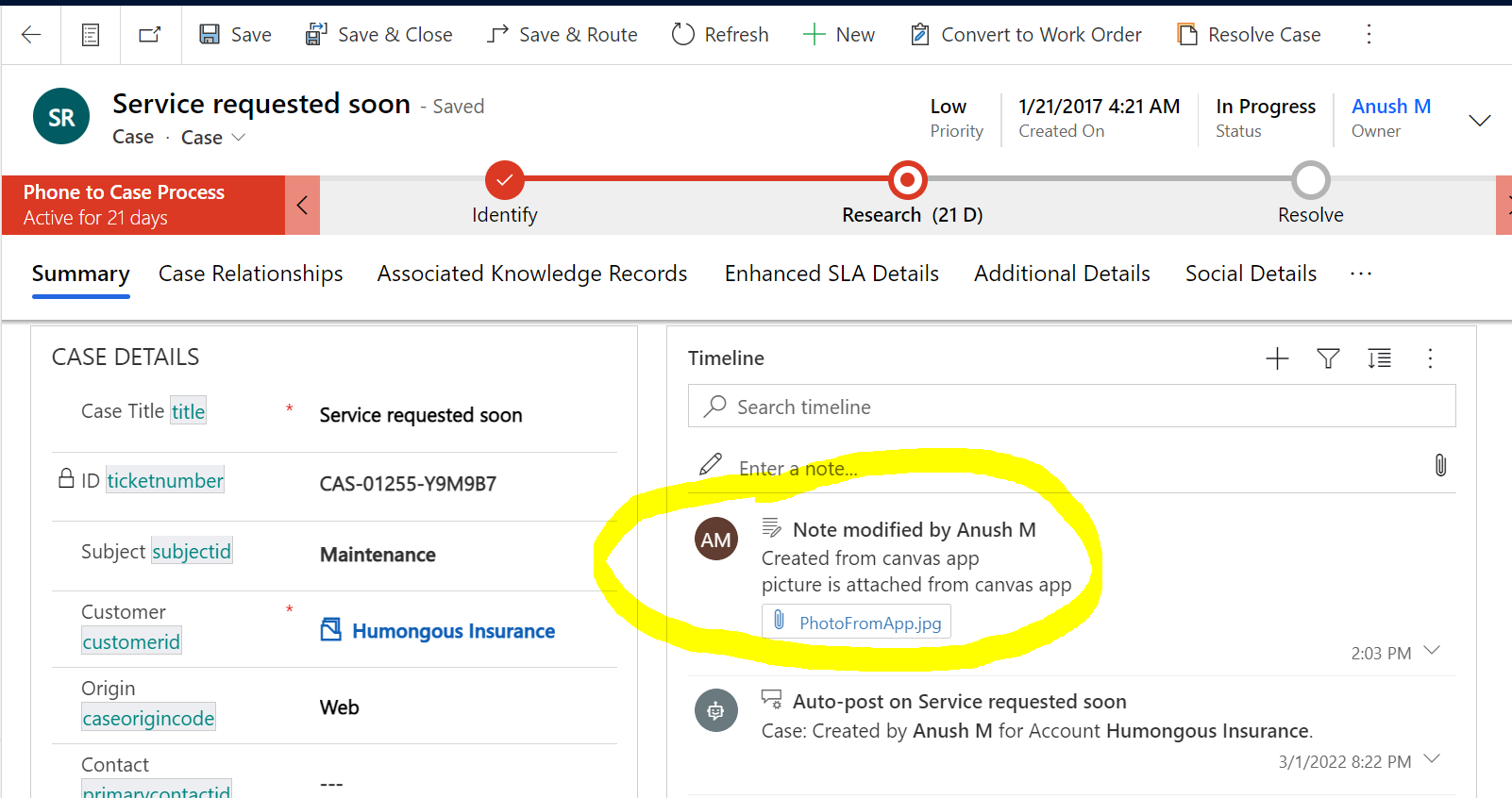
1. Enter the note title and description and click on save button to create a record in Dynamics 365



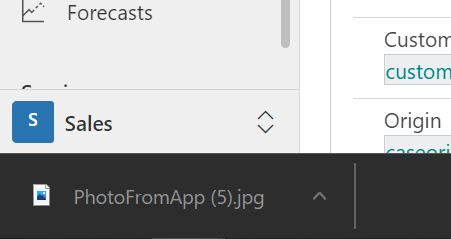
1. A dialog box will be displayed confirming the record creation in CRM. Selecting OK will navigate the screen back to case list view to select any other case.



1. Navigating to the case record in CRM to check the Note created from the Canvas app.



1. Clicking on the image hyperlink, photo can be downloaded,

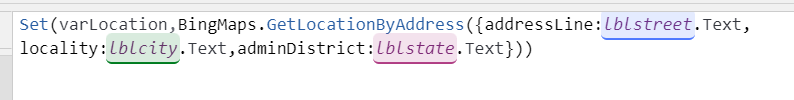


Technical Details:

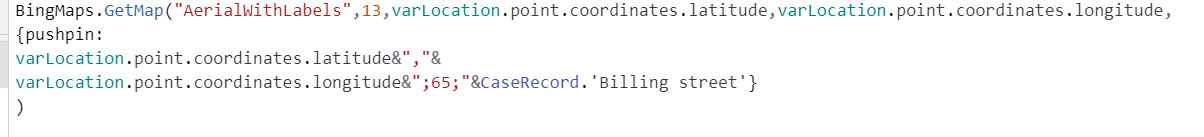
1. Vertical gallery control is used to show cases in the list view.
2. Collections are used to store the image “on select” property of camera control



1. “On Visible” property of the map screen below function is used to locate the address on map by using address



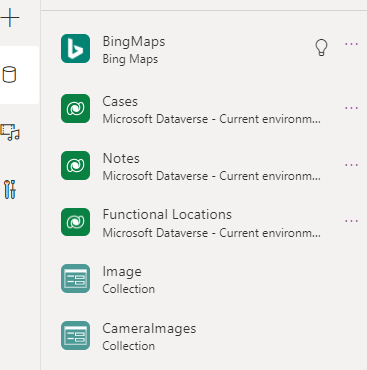
1. On “Image” property of the Image control to display the map below function is used to pin the actual location of the customer on the map.



1. On “On Select” property of the submit button patch function is used to create the record in CRM.



1. Below data connections are used as part of this app.



Solution Import and pre-requisites:

1. Some changes are done on the case form to accommodate on the canvas app, for this dependency a managed solution with the name “CanvasandPowerBI\_1\_0\_0\_1\_managed”

Should be imported into the environment.

1. As there is a Bing map integration in place, a new connection with the API key below has to be created before importing the “SurveyCanvasApp-Case\_20220323091121” canvas app package.

API key:

Atun5OutJt4fSrTOGNvkPQFwf0qJCwz\_6AZhXzRbjhApZUYKeFuyYoXv54Wfe26s

1. Solution and package files can be found in the below git hub link.

<https://github.com/Anushrao9/CanvasApp_Package>

<https://github.com/Anushrao9/PowerBIReport>