Connect Dataverse to Microsoft Teams

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Scenario

Business Problem

- Hundreds of customer channels in Teams
- Files and Conversations critical to customer success story
- Repeated and inefficient manual lookup
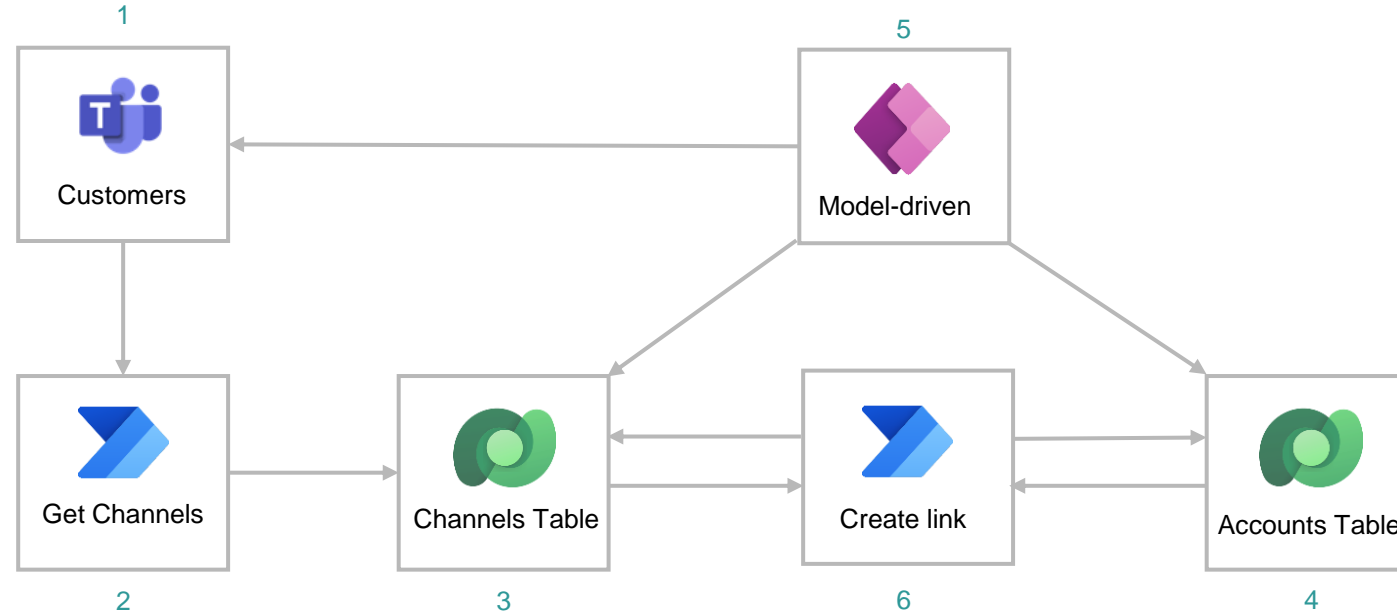
Technical Problem

- No Microsoft Teams integration in Dataverse Model-driven apps
- Dynamics 365 only

Our Solution

- Power Automate to collect customer channels
- Link Account to channel
- Dynamic "Open Teams" via Command Bar in Model-driven app

Solution

1. Customer channels in multiple teams - 200 channel limit / team.
2. Flow collects channel info and stores in a Channels table (multiple times per day)
3. Channels table includes name, team name, link to channel
4. Account table has look-up to Channels table to create the link between Account and Channel
5. Model-driven app allows users to connect Account to Teams channel
6. Flow creates "msteams" link and copies value to Account for use with Power Fx
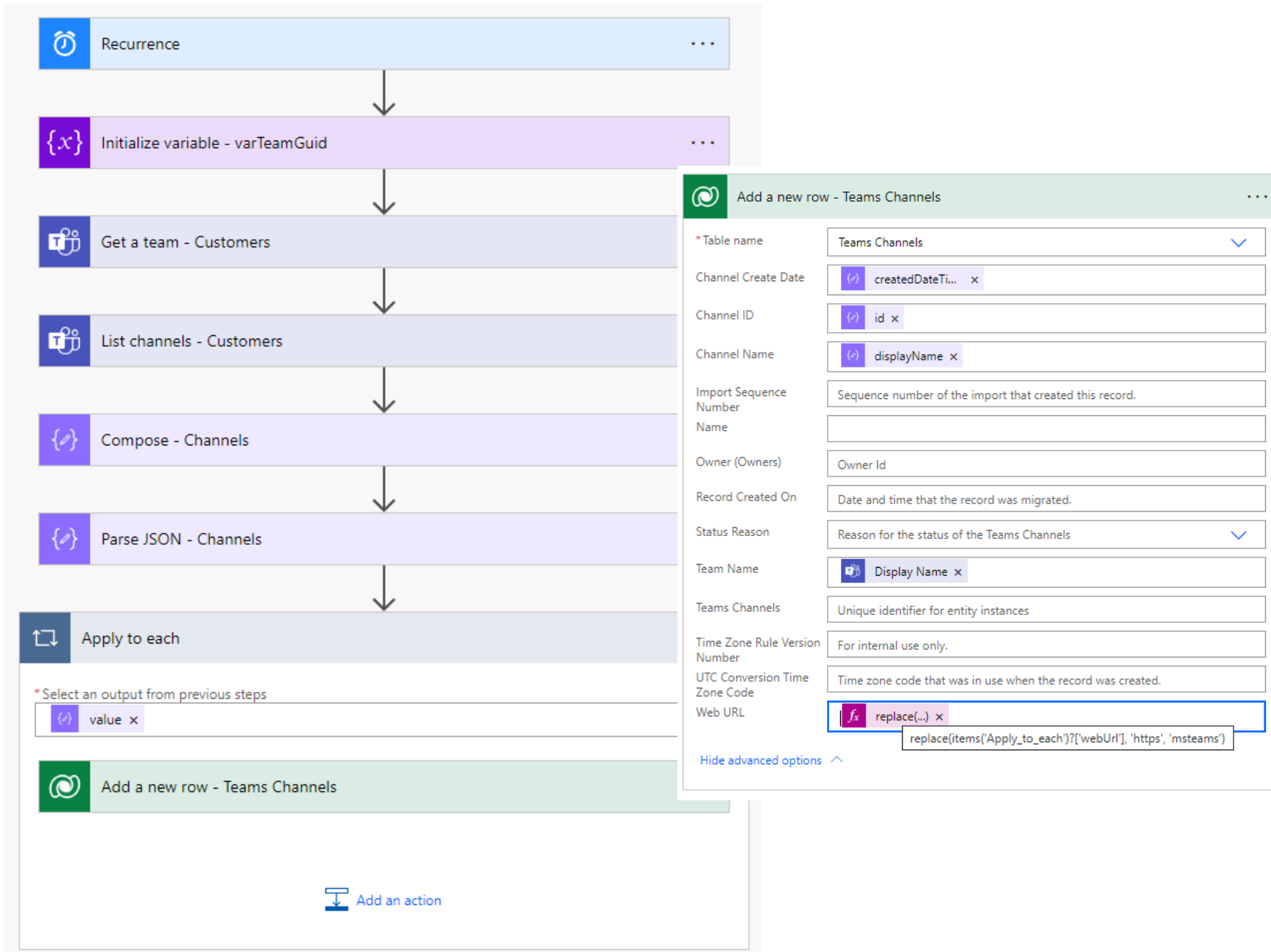
Power Automate – Initial Harvest

- Executed once per full Customer team
- Variable to store the GUID of the Customer team
- Get the team info
- Get the channel listing
- Compose and Parse channel listing for use with in the "Add a new row" action
- For each channel add a new row
- Web URL replaces "https" with "msteams"
- This allows opening in Teams client
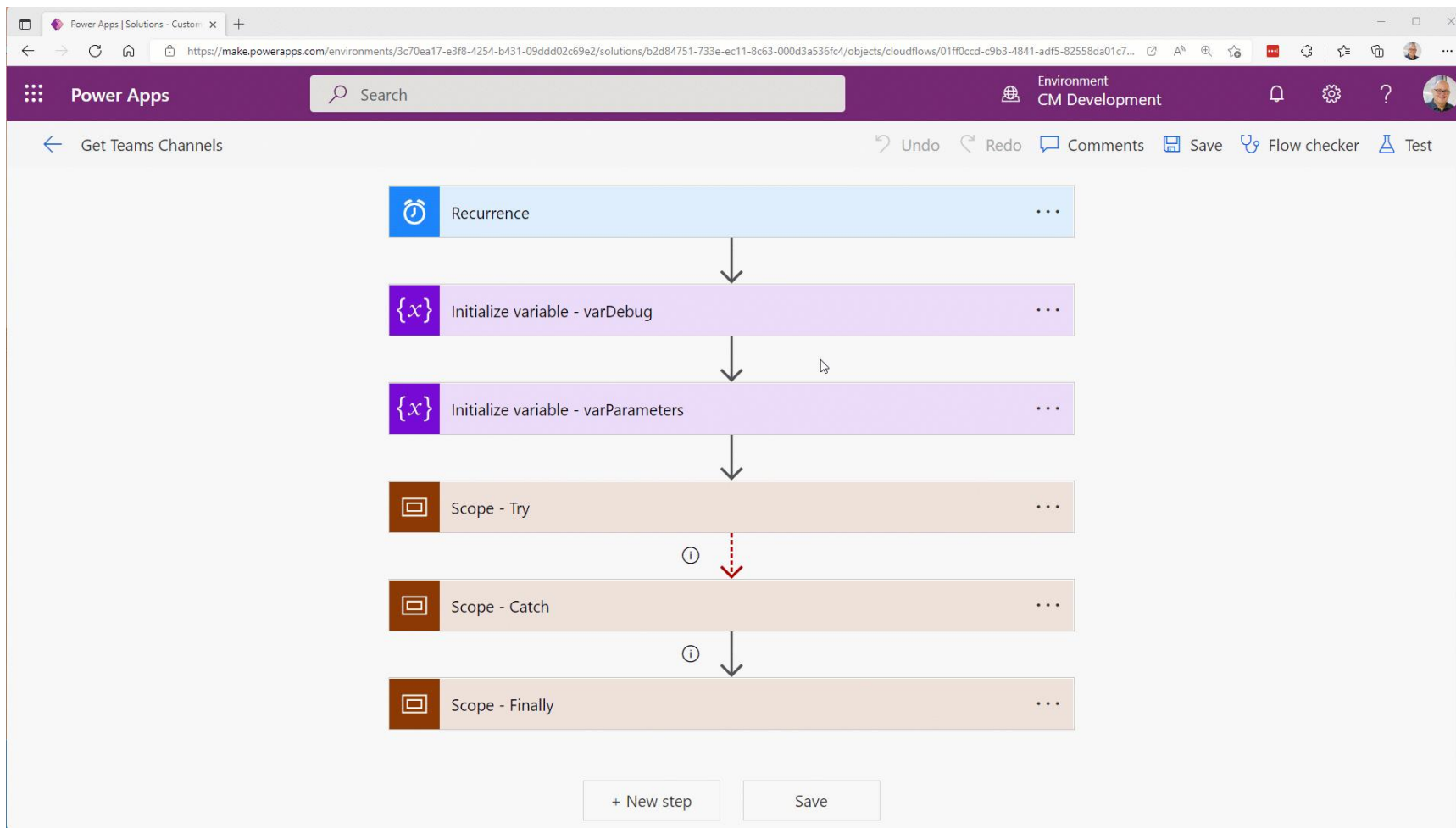
Power Automate - Get Channels

- Executed multiple times per day against current Customer team
- Variable to store the GUID of the Customer team
- Get the team info
- Get the channel listing
- Compose and Parse channel listing for use with in the "Add a new row" action
- For each channel add a new row
- Web URL replaces "https" with "msteams"
  - This allows opening in Teams client
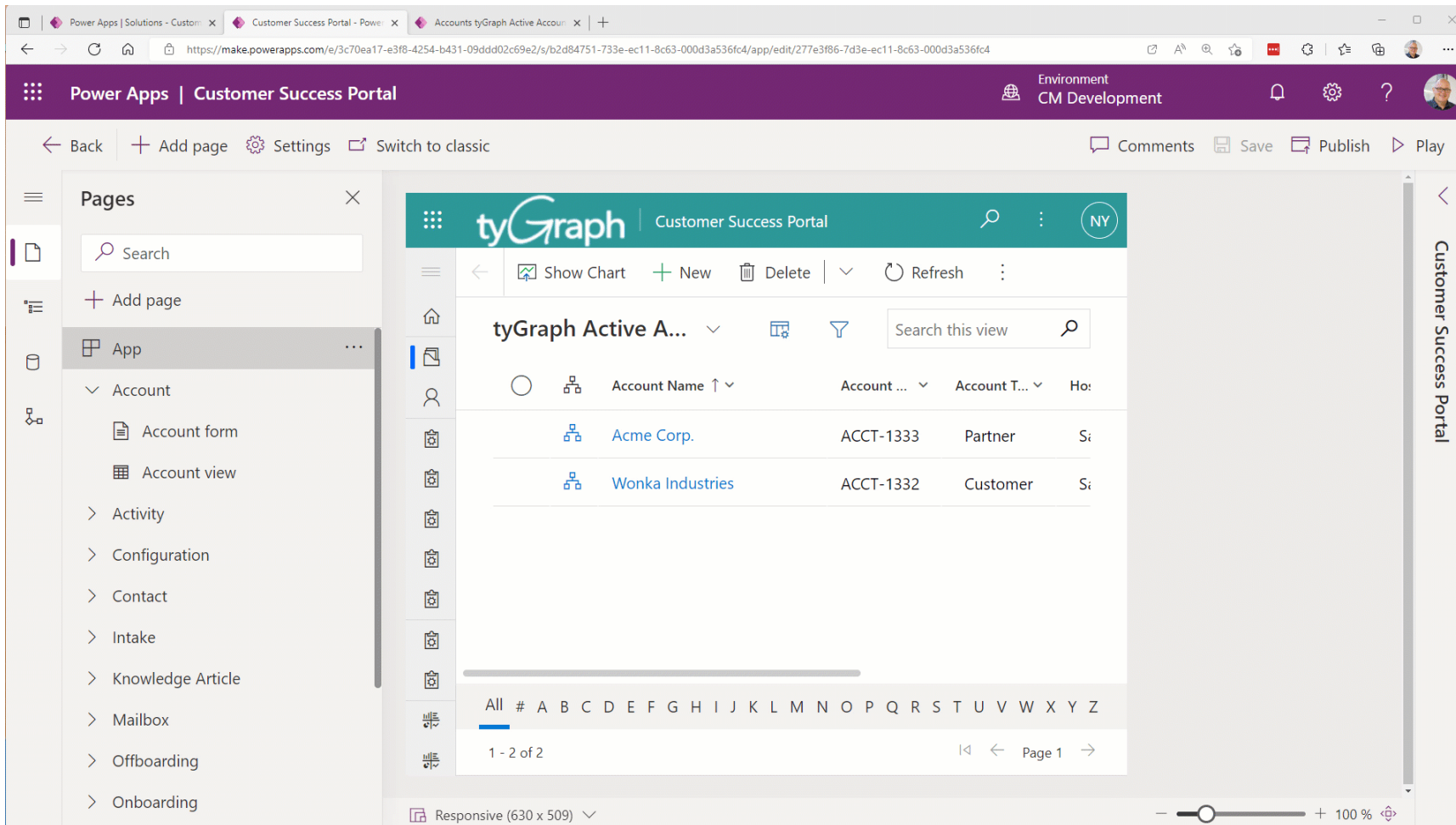
Power Apps – Command Bar

- Model-driven app
- Add a button to the Command Bar that will open the related customer channel
    - Account table Main form
- Power Fx used to show/hide the button
- Power Fx used to launch the "msteams" channel URL

User Experience

- From Account record
- Select target channel
- Flow copies URL to from Channel table to Account record
  - Copy required for Power Fx
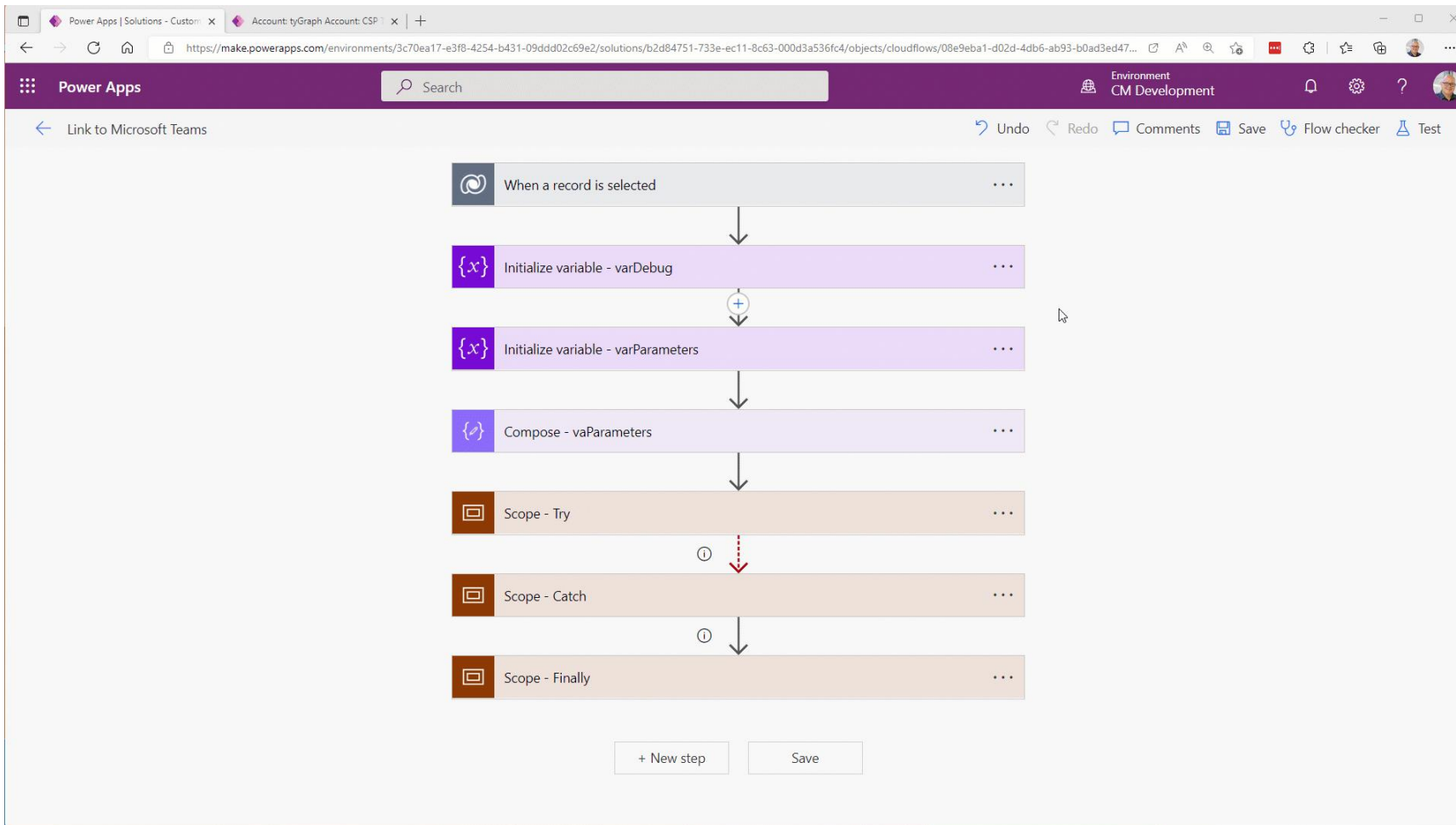
Power Automate – Link to Teams

- Executed on demand
- Get Account details
- Get Channel details
- Confirm that a Customer channel was selected
- Update Account row
- Send in-app notification
- Catch errors
  - Notify Admin on error

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Marginal gains

Value is added to the user experience by removing the manual lookup of the customer channel in MS Teams where there are hundreds of channels across multiple teams.

This marginal gain will give time back to my users, decrease friction in their work and allow them to focus on the business of work.

Thanks!!!

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