



# 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

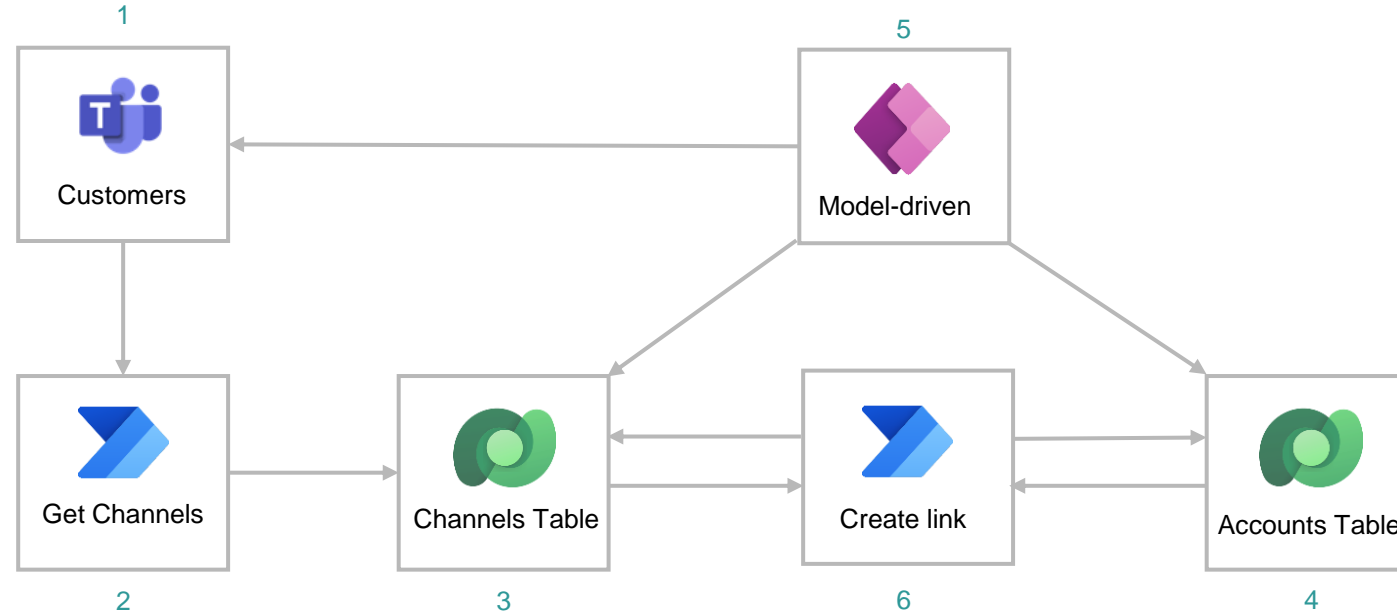
- No Microsoft Teams integration in Dataverse Model-driven apps
- Dynamics 365 only

## Our Solution

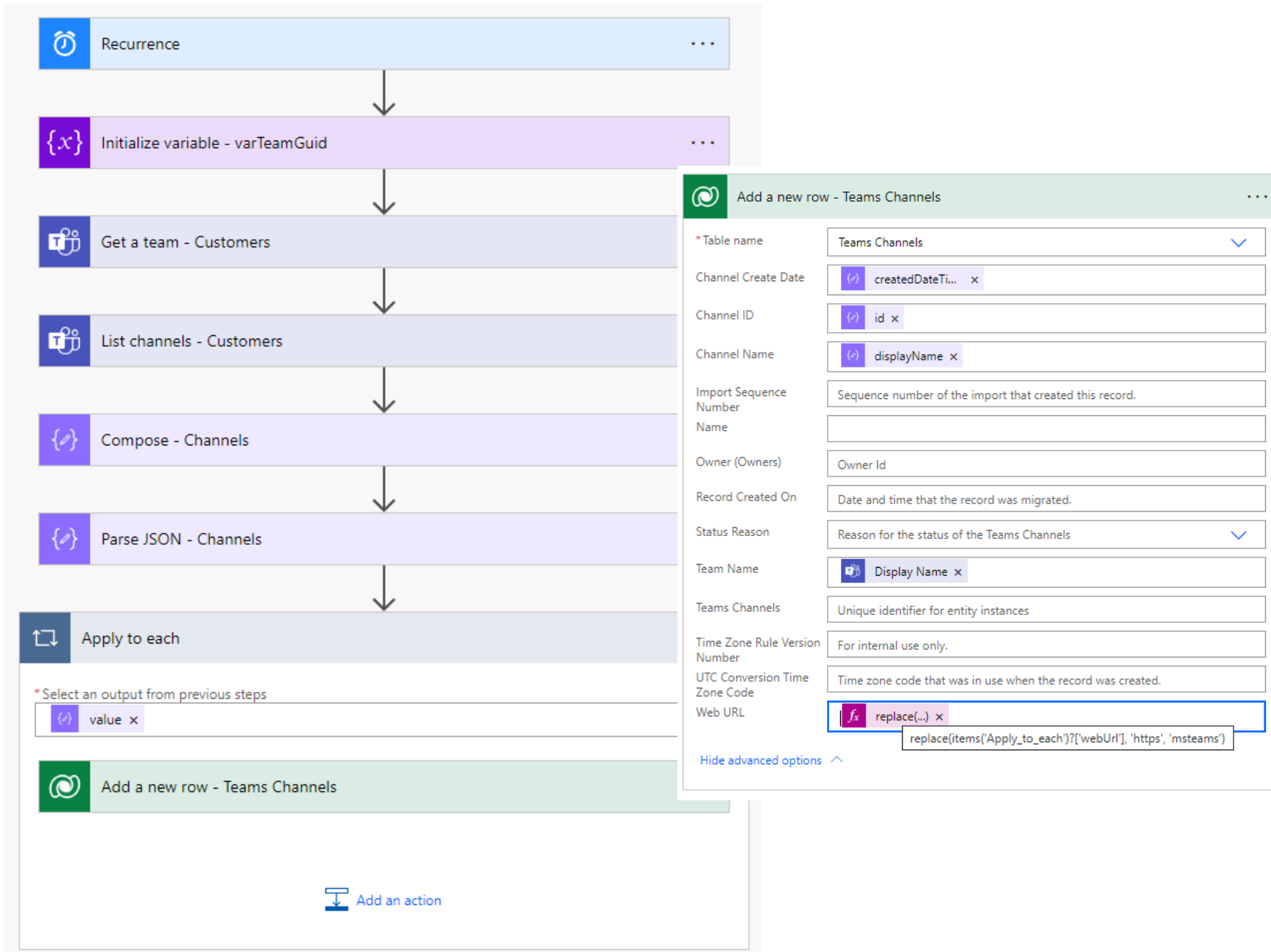
- Power Automate to collect customer channels
- Link Account to channel
- Dynamic “Open Teams” via Command Bar in Model-driven app



# Solution

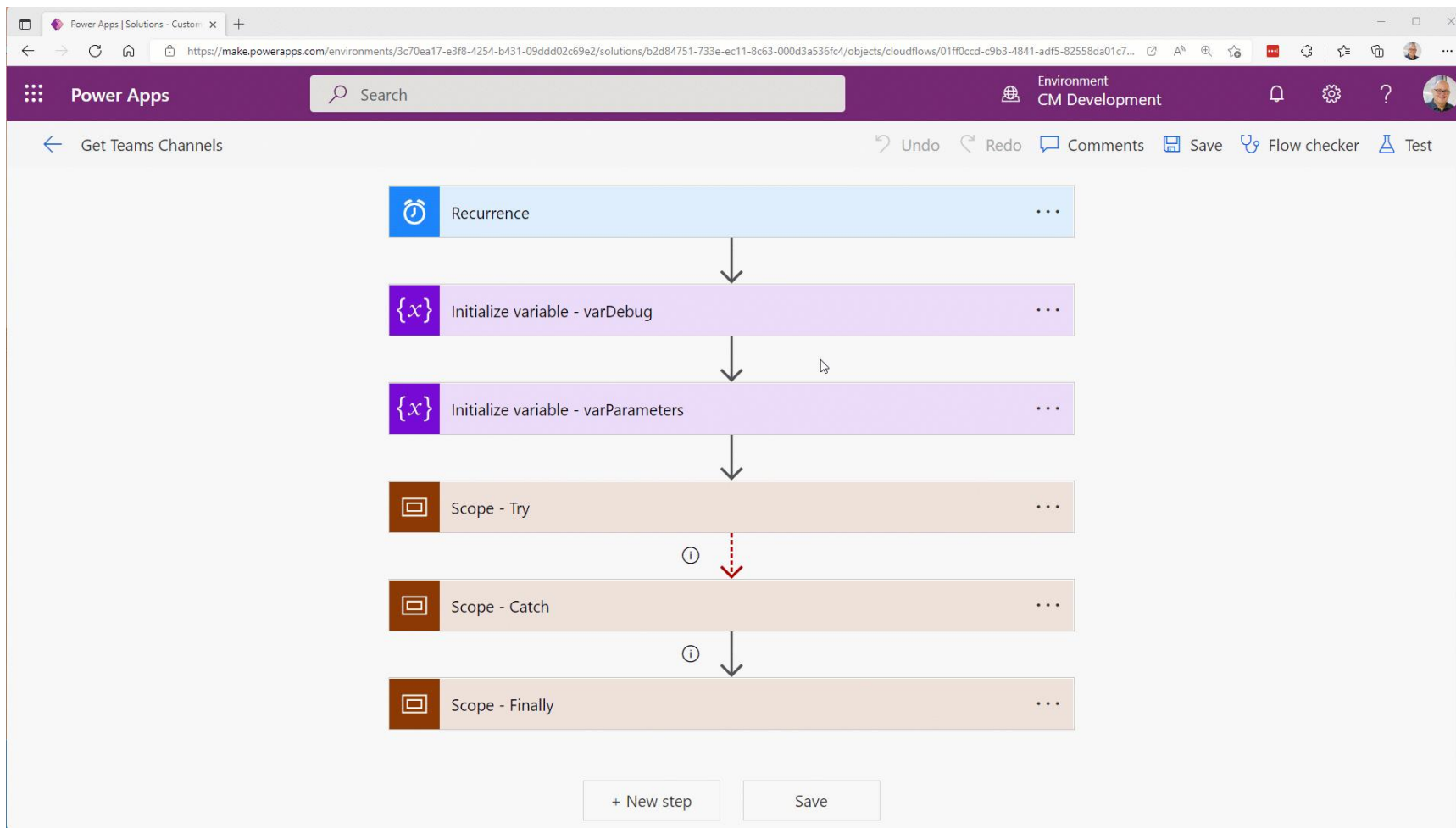


1. Customer channels in multiple teams - 200 channel limit / team.
2. Flow collects channel info and stores in a Channels table (multiple times per day)
3. Channels table includes name, team name, link to channel
4. Account table has look-up to Channels table to create the link between Account and Channel
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



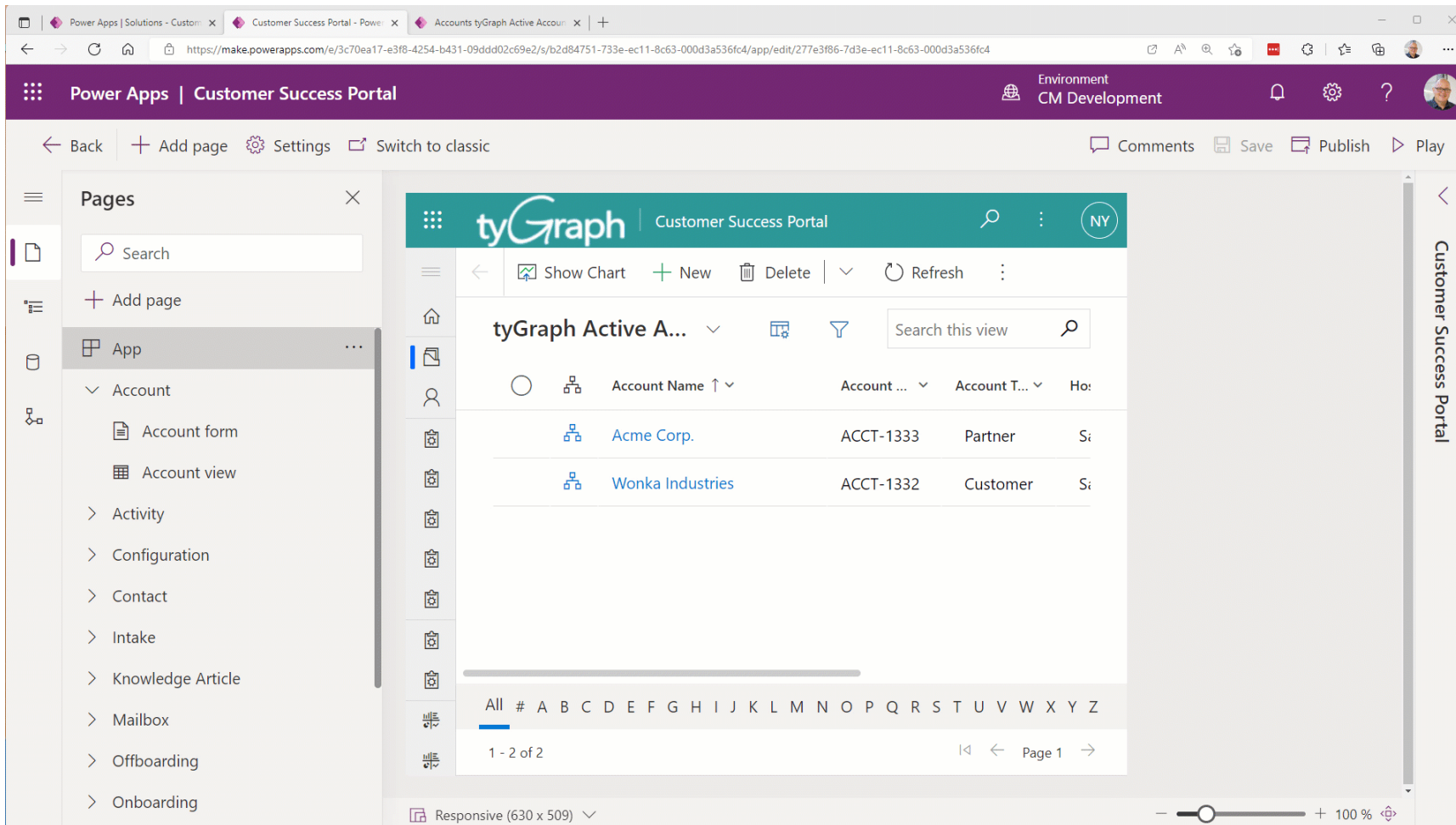
## Power Automate – Initial Harvest

- 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



Power Apps | Solutions - Custom: x Account: tyGraph Account: CSP x

https://orgd9f1ad24.crm.dynamics.com/main.aspx?appid=5f1c7478-bf47-ec11-8c60-0022481c94d5&pagetype=entityrecord&etn=account&id=be35a9bb-4b9e-ec11-b400-0022483028a6

tyGraph Customer Success Portal Search

Home Customers Accounts Contacts Customer Care Administration Reports Configuration

Open Helpdesk Open tyGraph Docs Save Save & Close New Deactivate Connect Assign Delete Share

**CSP Test** - Saved Account ACCT-1265 Account Number Norm Young Owner

Summary Details Configuration Related

**ACCOUNT INFORMATION**

Account Name	* CSP Test
Account Type	Customer
tyGraph Products (SKU)	tyGraph Enterprise
Renewal Income	---
Support Level	Standard
Is Strategic	No

**TECHNICAL DETAILS**

Hosting Type	SaaS
tyGraph Products In Use	tyGraph Pages, tyGraph for S...
In Preview Ring	No

**Primary Contact**

CSP Test User

**CONTACTS**

CSP Test User	
cspctest@unlimitedviz.com	
IT	

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**Timeline**

Search timeline

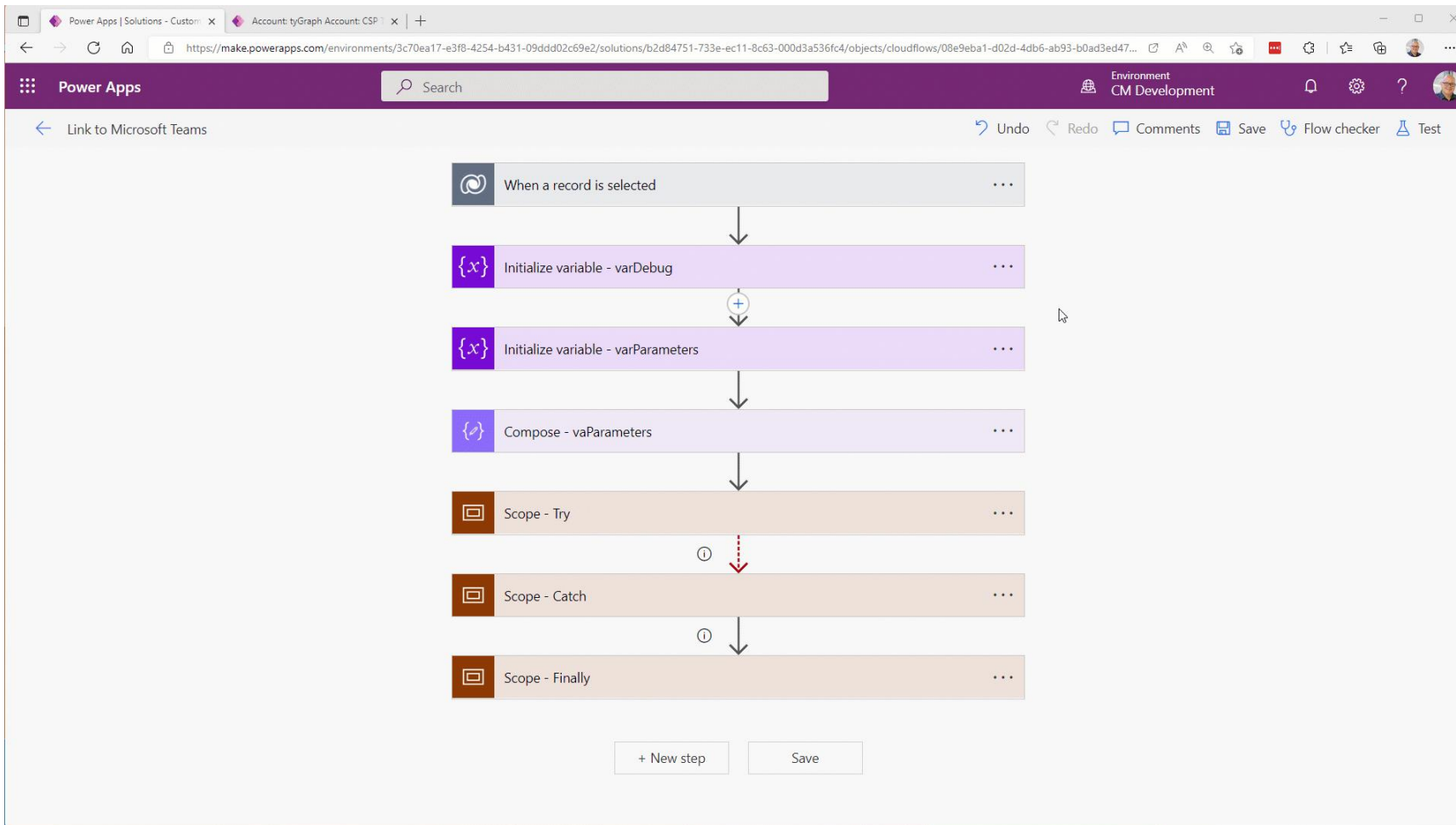
Enter a note...

**Get started**

Capture and manage all records in your timeline.

## 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



# 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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<https://ca.linkedin.com/in/norm-young>

