



# Creating customer-centric onboarding experiences



A photograph of two people in an office setting. A woman with curly hair, seen from behind, is seated at a desk working on a computer. A man stands behind her, looking at the screen. The computer monitor displays a dashboard from Microsoft Business Central, showing sales figures and charts. The office has large windows and green plants.

Customers love Business Central

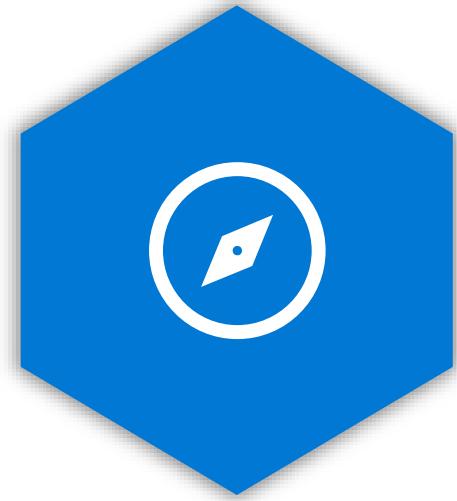
Scaling the channel  
is a challenge

# Onboarding Vision

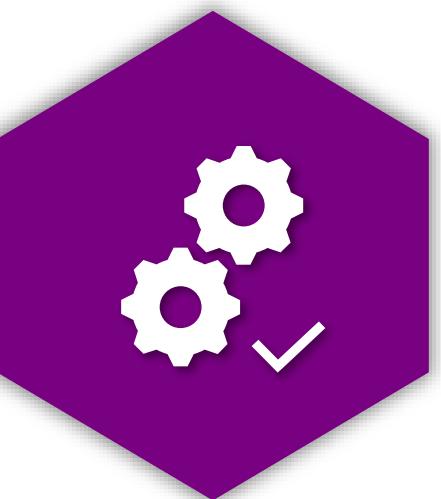
Customers can **find**, **explore**, and ***start using***  
Business Central + apps by themselves

# Onboarding Vision

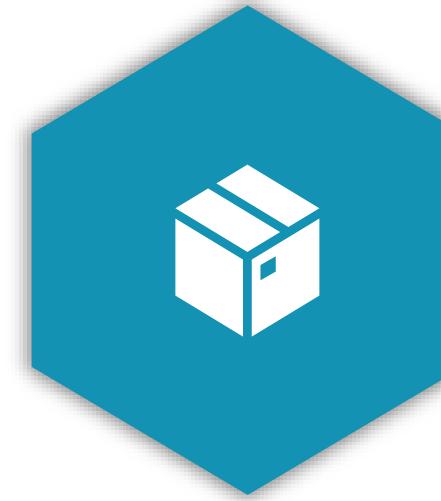
Customers can **find**, **explore**, and **start using** Business Central + apps by themselves



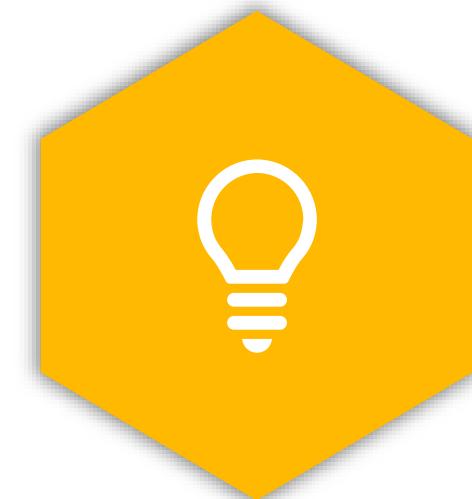
Match with  
partner & solution



Self-finalized  
trial & setup

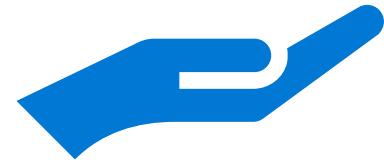


Relevant in-  
product guidance

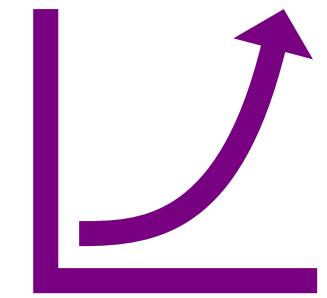


Learn while doing

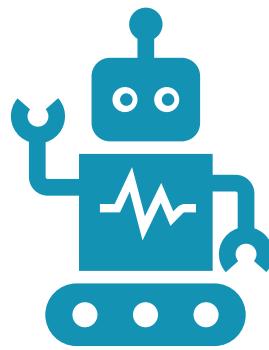
Scale is key



**Opportunity is  
there**



**Scale is critical for  
success**



**Automation to  
unlock resource  
constraints**





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Finance ▾ Cash Management ▾ Sales ▾ Purchasing ▾



Customers Vendors Items Bank Accounts Chart of Accounts



Get started

# Hi, meet Business Central!

You're all set to try out our demo company, Cronus. Go explore on your own, or take a quick tour first.

[Show demo tours](#)

## Activities ▾

Sales This Month

\$124,896

> See more

Overdue Sales Invoice Amount

\$0

> See more

Overdue Purch. Invoice Amount

\$49,422

> See more

Sales Invoices Predicted Overdue

0

> See more

## Ongoing Sales

Sales Quotes

2

>

Sales Orders

4

>

Sales Invoices

7

>

## Ongoing Purchases

Purchase Orders

5

>

Ongoing Purch... Invoices

3

>

Purch. Invoices... Next Week

0

>

## Payments

Unprocessed Payments

1

>

Average Collect... Days

15.6

>

Outstanding V... Invoices

13

>

## Camera

[Create Incoming... from Camera](#)



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## Get started

# Here are a few things you can try out

*The Cronus company data you are using is for demonstration, evaluation, and training purposes.*

## Your checklist:

- 1. A first look around
- 2. Edit and analyze in Excel
- 3. Share to Teams
- 4. Manage sales in Outlook

## Take a first look around

The role-based home page offers quick access to key metrics and activities. We'll also show you how to explore all the Business Central features.

⌚ 2 minutes

[Start tour](#)[Skip for now](#)

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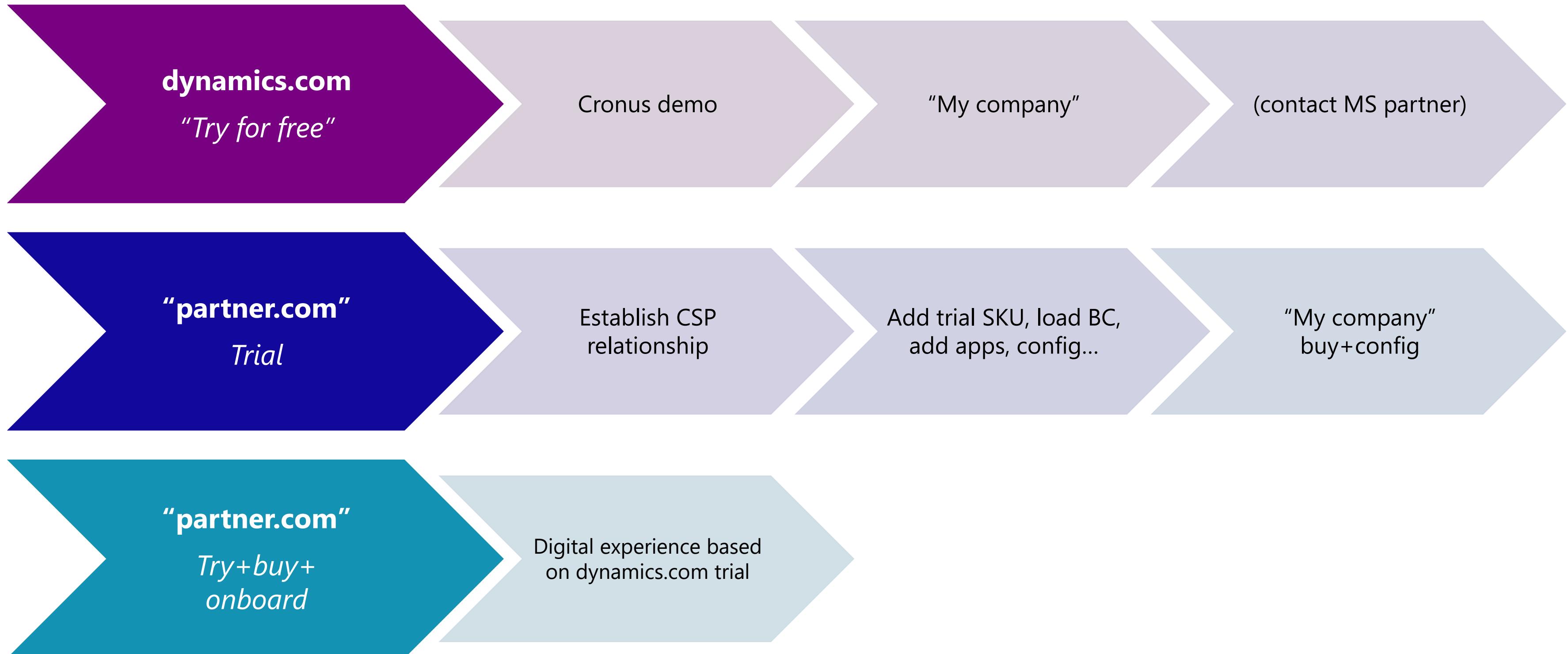
13

&gt;

## Camera

[Create Incoming... from Camera](#)

## Customer & Partner journeys



“partner.com”

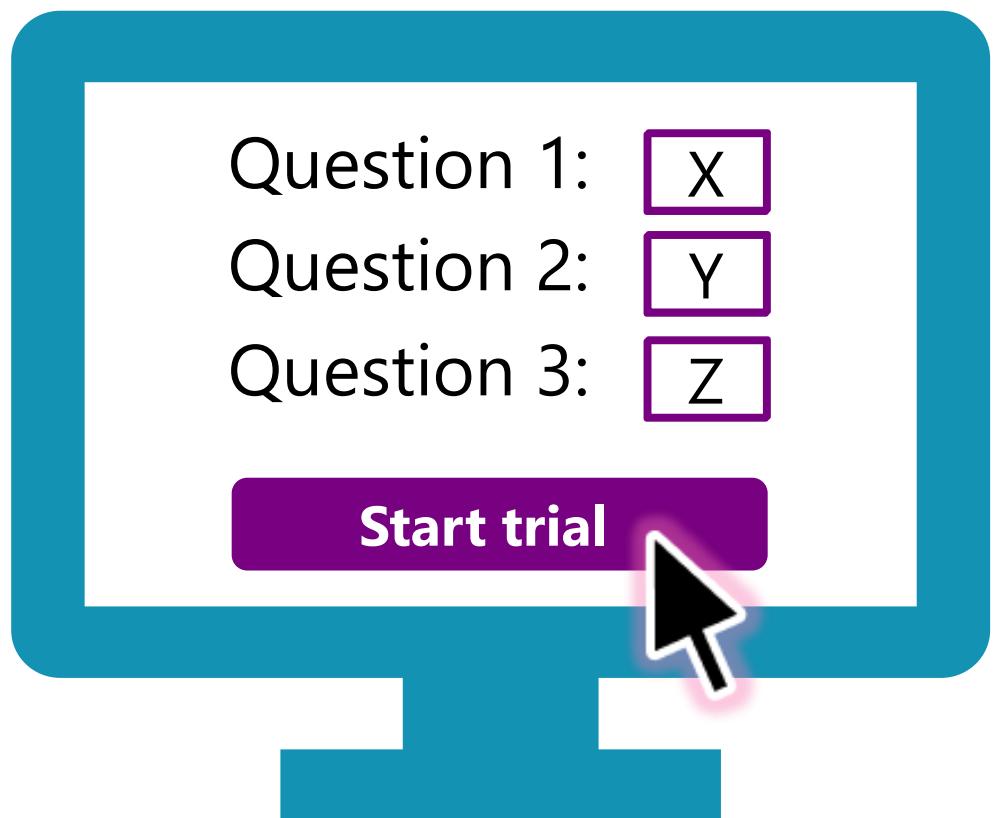
*Try+buy+  
onboard*

Digital experience based  
on dynamics.com trial

- Profile the prospect on partner.com web site
- Redirect to dynamics.com sign-up from partner.com
- **AppSource app provisioned with the trial**
- **Profiler outcome available in-product**
- Partner-driven experience at first sign-in
- Try in Cronus + embedded buying experience
- Onboard in My Company + dynamically load data
- **Customer is live**

# Create customer-centric onboarding experiences

Customer answers questions  
→ *determines their profile*



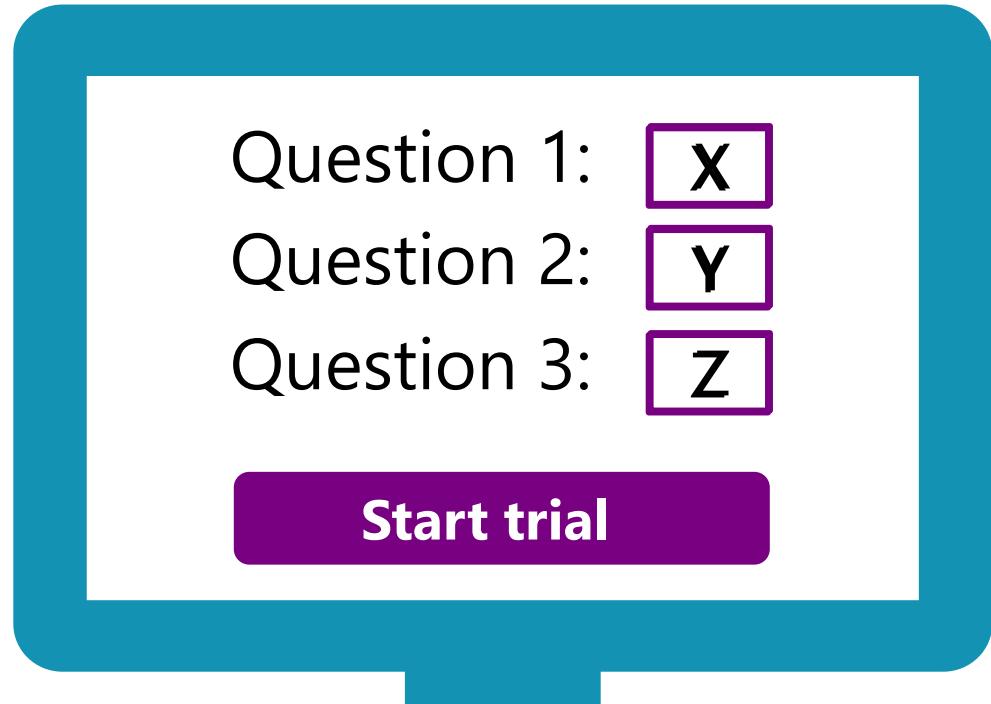
**Your web site**



**Your new customer**

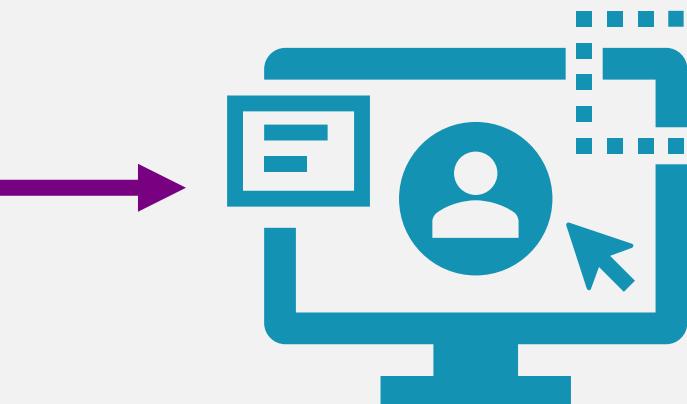
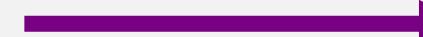
# Create customer-centric onboarding experiences

Customer answers question  
→ *determines their profile*



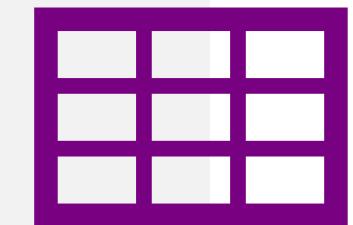
**Your web site**

**Then redirected  
to sign up at  
Dynamics.com**



**Your experience ready  
to greet & onboard**

**Profiler answers  
stored in a  
system table**



**Standard trial  
provisioning**



**Your app is  
installed before  
customer signs in**

# Demo

Profiling and sign-up to a customized trial

# Profile prospects & customers on **your web site**

**My Partner Website**

For us to give you the best experience, please answer a few questions

What are you interested in?

Trade

Project Management

Bio Diversity

Which system do you currently use?

No current system

Excel

Quickbooks

How many users will be using Business Central?

1-5

6-10

10-25

25-50

**Start trial**

The diagram illustrates how user responses from the form are mapped to two distinct applications, App A and App B. Three choice combinations are shown as dashed boxes:

- A blue dashed box containing "Bio Diversity" (selected) and "Excel" (selected).
- A red dashed box containing "Quickbooks" (selected).
- A green dashed box containing "10-25" (selected).

Arrows point from these boxes to two separate application icons:

- An arrow from the blue dashed box points to a teal cube labeled "App A".
- An arrow from the red dashed box points to a purple cube labeled "App B".
- An arrow from the green dashed box points to the "Start trial" button.

Choice combinations implies a collection of onboarding elements bundled together in a *coherent experience* in an *AppSource app*

# You've selected Dynamics 365 Business Central

## 1 Let's get you started

Enter your work or school email address, we'll check if you need to create a new account for Dynamics 365 Business Central.

Email

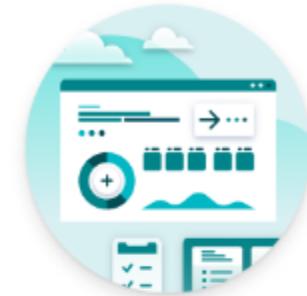
By proceeding you acknowledge that if you use your organization's email, your organization may have rights to access and manage your data and account.

[Learn More](#)

[Next](#)

## 2 Create your account

## 3 Confirmation details



### Connected business management

- Connect sales, service, finance, and operations in a single solution
- Edit and analyze your data in Excel

From your profiler, the user is sent to **standard trial sign-up** at [dynamics.com](#), with the **profiler responses** as the *context* of the sign-up.

This **context is passed on** to Business Central

via Teams  
anic apps via



Business Central

Dynamics 365

We provision the standard trial & the AppSource app  
*you decided* is a **match with the profiler responses**.



Getting ready...



# Load a custom rolecenter

Set it in the *User Triggers* and *System Initialization* codeunits

Subscribe to the *OnAfterUserInitialization* and *OnAfterLogin* events, respectively

The screenshot shows the Dynamics 365 Business Central interface with a custom rolecenter loaded. The top navigation bar includes 'Dynamics 365 Business Central', 'CRONUS USA, Inc.', 'All Reports', and a gear icon. The main area features a welcome message: 'Welcome Søren Alexandersen! Want to help save the world? So do we!' followed by a note: 'You started a trial for Business Central with Bio Diversity Management. We hope you'll love it!'. To the right, there's a 'Your checklist:' section with a list of six items, some checked (e.g., 'Become a champion', 'Start tracking bio diversity', 'Excel users love us', 'Track your plants', 'Plants lifecycle') and one unchecked ('Want to learn more?'). Below this is a 'Manage your plants lifecycle here' section with a brief description and a 'Start tour' button. A sidebar on the right lists 'Plants at risk' with a table:

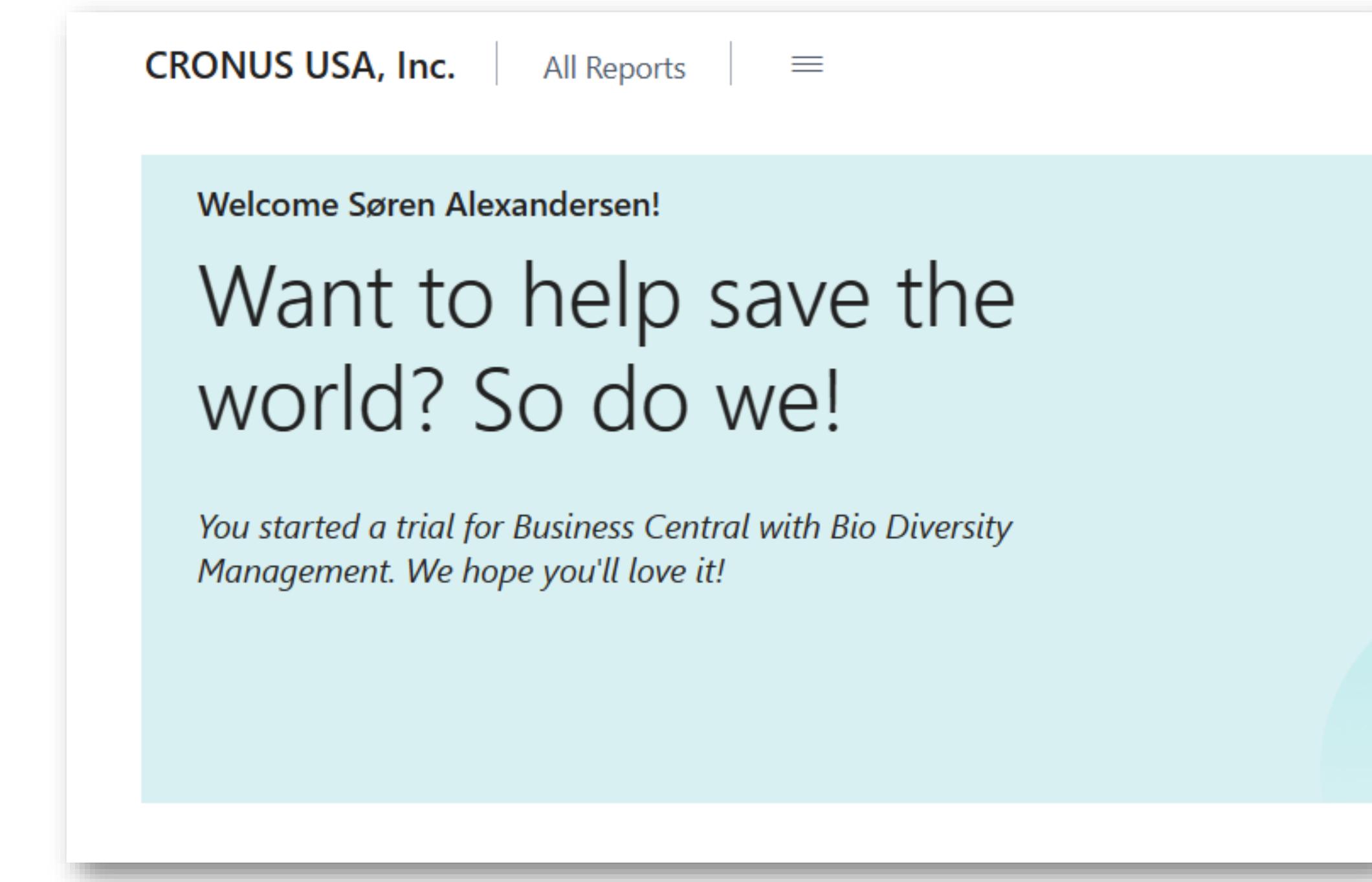
Name	Occurrences ↑
Meadow Cranesbill	4
Hoary Plantain	7
Greater Burnet-Saxifrage	18
Mountain Melick	42

The bottom left shows a 'My Settings - ADMIN' dialog with fields for 'Role' (Bio Diversity Manager), 'Company' (CRONUS USA, Inc.), and 'Work Date' (4/10/2023). A 'Back to top' link is located near the bottom center.

# Modify the welcome banner texts

Override the banner texts in the *Checklist Banner* codeunit

Do this by subscribing to the *OnBeforeUpdateBannerLabels* event



# Create checklist tasks based on profiling

Your checklist:

- 1. Become a champion
- 2. Start tracking bio diversity
- 3. Excel users love us
- 4. Track your plants
- 5. Plants lifecycle
- 6. Want to learn more?

**Bio Diversity Mgmt. will assist you**

In this short video we will show you how Bio Diversity Management can help you become a champion for bio diversity and help make the world a better place.

⌚ 1 minute

[▶ Play video](#) [Skip for now](#)

Some features connect to other Microsoft services

Add potential checklist tasks through the ***Guided Experience Item*** codeunit and add relevant tasks to the checklist

# Branch off checklists for more elaborate setup steps

Use the *OpenAssistedSetup()* function in the *Guided Experience Item* codeunit an Assisted Setup list page filtered to your custom category

The screenshot shows a web-based application interface titled "Assisted Setup". At the top, there are navigation icons for "Search", "Start Setup", and "General Videos". Below the header, a table lists items under the heading "Title". The first item, "Bio Diversity Management", is expanded, revealing two sub-items: "1: Define the list of insects you want to work..." and "2: Let us define the list of plants you want to...". Each sub-item has a checkbox column and a "Learn more" link.

Title	Completed	Learn more
<b>Bio Diversity Management</b>	<input type="checkbox"/>	<a href="#">Learn more</a>
1: Define the list of insects you want to work...	<input type="checkbox"/>	<a href="#">Learn more</a>
2: Let us define the list of plants you want to...	<input type="checkbox"/>	<a href="#">Learn more</a>

# Use Assisted Setups to download data Just-In-Time

The screenshot shows a software window titled "Define the list of plants". On the left, there's a sidebar with a "Your checklist:" section containing six items, where the first item is marked as completed. The main area displays a "Bio Diversity Management" logo with icons for a cloud, a bar chart, and a recycling symbol. Below the logo, it says "Step2 - Verify the list of plants." A message asks the user to verify the list looks like expected and that it will be stored in the system. A table lists five plant species with their families and descriptions:

Name	Family	Description
Meadow Vetchling	FABACEAE	Herbaceous annual plant
Mountain Avens	ROSACEAE	Herbaceous perennial plant
Mountain Melick	FABACEAE	Herbaceous annual plant
Ox-Eye Daisy	ASTERACEAE	Herbaceous perennial plant
Pale Flax	LINACEAE	Herbaceous annual plant

At the bottom, there are "Back", "Next", and "Finish" buttons. The status bar at the bottom left says "Plants at risk ▾".

Use *Assisted Setups* for asking questions and further profiling.

Use the answers to clarify *which data to load*.

Load from a central data source, so you always load *most recent data*.

Consider *open sourcing the data* (use Github as a source).

# Use your custom pages to spotlight cool integrations

The screenshot shows a Microsoft Business Central application interface. A modal dialog box is centered over a list of plant families. The dialog has a teal header with white text that reads "We integrate with your favorite apps". Below the header, there is a message: "For example, you can easily edit this list of plants in Excel and import it back into Business Central". At the bottom left of the dialog, it says "2 of 2". At the bottom right, there are two buttons: "Got it" and "Back". The background of the application shows a table with columns: Family, Is Pollinator, and Occurrences. The "Occurrences" column contains numerical values like 209, 122, 625, etc. The "Is Pollinator" column contains checkboxes, some of which are checked. The "Family" column lists plant families such as RANUNCULACEAE, PLANTAGINACEAE, ASTERACEAE, HYPERICACEAE, VALERIANACEAE, PRIMULACEAE, POACEAE, CORNACEAE, FABACEAE, BETULACEAE, FAGACEAE, CARPINACEAE, and PINACEAE.

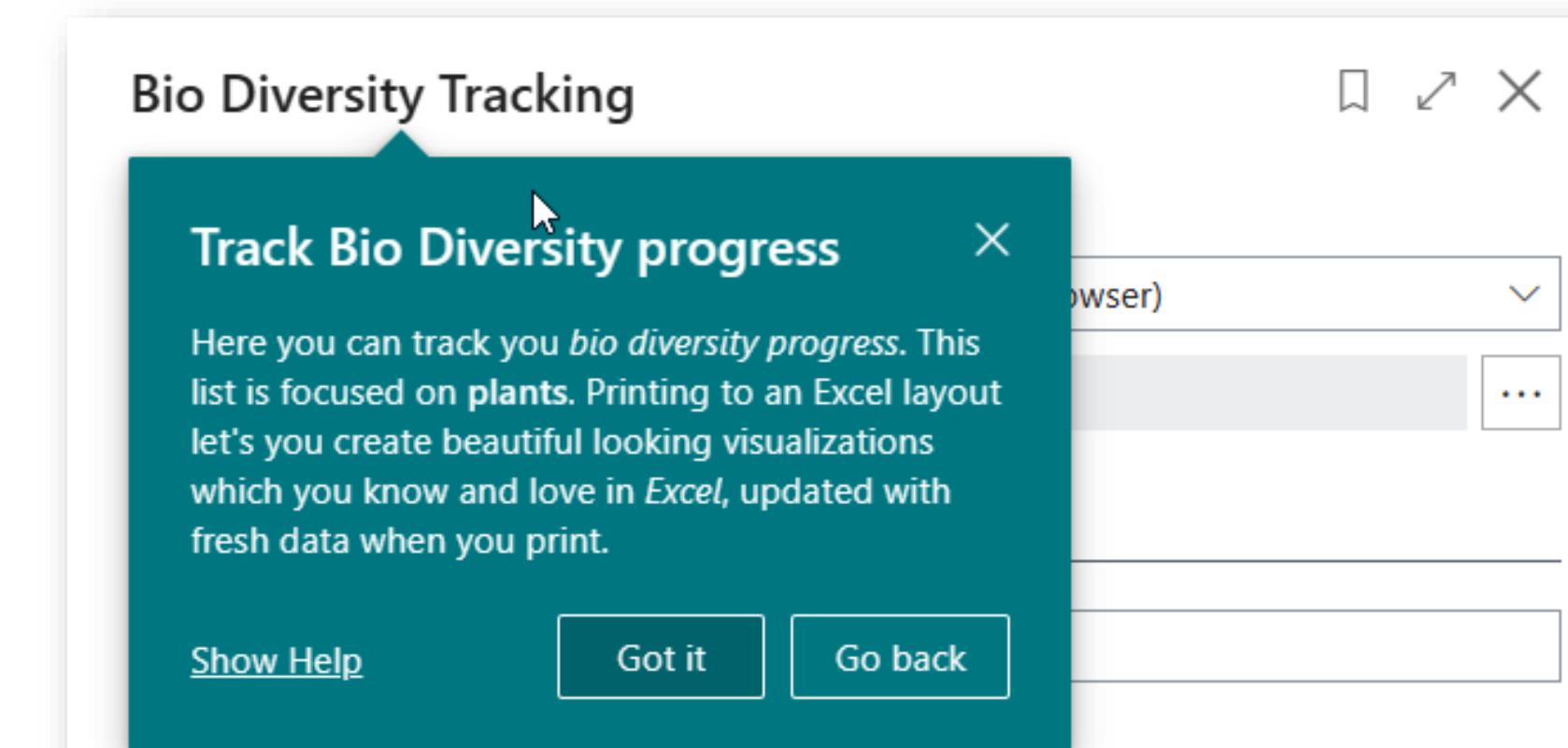
	Family	Is Pollinator	Occurrences
erbaceous plant	RANUNCULACEAE	<input type="checkbox"/>	209
s annual plant	PLANTAGINACEAE	<input type="checkbox"/>	122
s biennial plant	ASTERACEAE	<input type="checkbox"/>	625
s perennial plant	HYPERICACEAE	<input type="checkbox"/>	433
s perennial plant	VALERIANACEAE	<input type="checkbox"/>	671
erbaceous plant	PRIMULACEAE	<input type="checkbox"/>	607
	POACEAE	<input type="checkbox"/>	275
	CORNACEAE	<input type="checkbox"/>	312
s annual plant	FABACEAE	<input type="checkbox"/>	403
	BETULACEAE	<input type="checkbox"/>	626
	FAGACEAE	<input type="checkbox"/>	930
	CARPINACEAE	<input type="checkbox"/>	790
	PINACEAE	<input type="checkbox"/>	687

Create a *Guided Experience Item* of type *Spotlight Tour* and add it to the checklist.

# Educate users with teaching tips on reports

Educate users about the *purpose* of a report.

Set teaching tips with the *AboutText* and *AboutTitle* properties.



Filter: Bio Diversity Plant

+ Filter...

Advanced >

Send to...

Download

Cancel

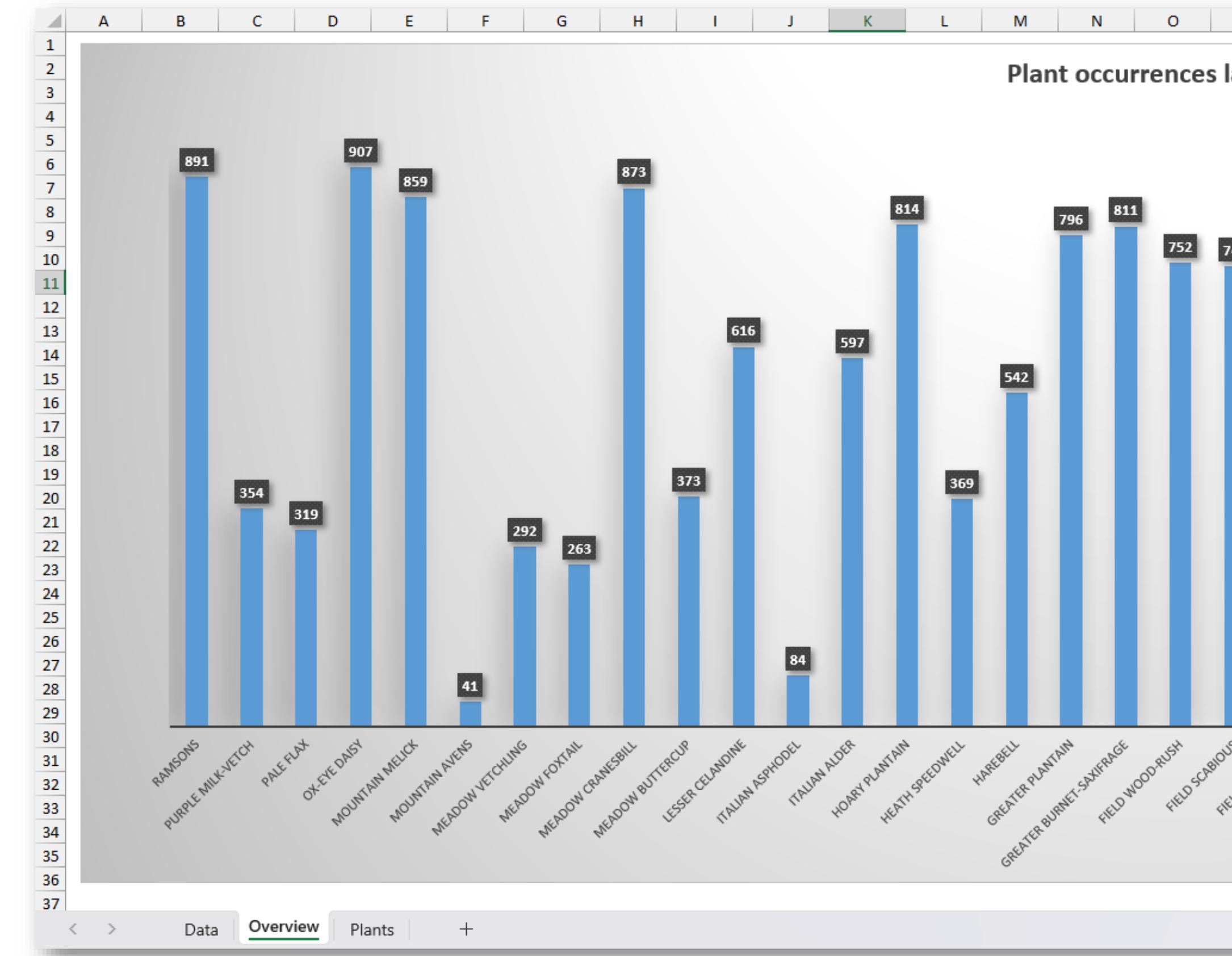
# Use Excel layouts to provide great looking customer ready reports

Create the dataset in a *report* object.

Deliver the Excel layout file (.xlsx) with your app, including all the great looking graphs and visualizations.

The *last active worksheet* in the file will be the one which opens when printed.  
Make it the best one.

For guidelines, samples, tips & tricks, see  
<https://aka.ms/BCExcelSamples>



# Educate users about a pre-defined analysis on queries

Use teaching tips on *Query* objects to introduce users to pre-defined analysis.

Use the *AboutTitle* & *AboutText* properties.

The screenshot shows a Dynamics 365 Business Central interface. At the top, there's a teal header bar with the text "Dynamics 365 Business Central". Below it, a navigation bar has a back arrow icon and the text "Top Plants". A light blue modal window is centered over the page. The modal has a title "Analyse Top Plants" and a close button "X". Inside the modal, there's a message: "Here you see the top plants spotted in the wild. By default the view is sorted by number of occurrences in the last year. You can create additional analysis views for more insights. Click around!". At the bottom of the modal are two buttons: "Show Help" and "Got it". To the right of the modal, there's a table listing various plant species with their families and descriptions. The table has columns for "Family" and "Description". Some rows are partially cut off on the right. The first few rows are: FAGACEAE (Tree), ASTERACEAE (Herbaceous perennial pl.), ALLIACEAE (Herbaceous perennial pl.), BETULACEAE (Tree), GERANIACEAE (Herbaceous perennial pl.). The table continues with many other entries like Mountain Melick, Hoary Plantain, etc.

Family	Description		
FAGACEAE	Tree		
ASTERACEAE	Herbaceous perennial pl.		
ALLIACEAE	Herbaceous perennial pl.		
BETULACEAE	Tree		
GERANIACEAE	Herbaceous perennial pl.		
MOUNTAINME...	Mountain Melick	FABACEAE	Herbaceous annual plant
HOARYPLANT...	Hoary Plantain	PLANTAGINAC...	Herbaceous perennial pl.
GREATERBURN...	Greater Burnet-Saxifrage	SAXIFRAGACEAE	Herbaceous perennial pl.
GREATERPLAN...	Greater Plantain	PLANTAGINAC...	Herbaceous perennial pl.
EUROPEANHO...	European Hornbeam	CARPINACEAE	Tree
FIELDWOOD-R...	Field Wood-Rush	JUNCACEAE	Herbaceous perennial pl.
FIELDSCABIOUS	Field Scabious	DIPSACACEAE	Herbaceous perennial pl.
EUROPEANLA...	European Larch	PINACEAE	Tree
COMMONVAL...	Common Valerian	VALERIANACEAE	Herbaceous perennial pl.

# Best practices



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Customers Vendors Items Bank Accounts Chart of Accounts



Get started

# Hi, meet Business Central!

You're all set to try out our demo company, Cronus. Go explore on your own, or take a quick tour first.

[Show demo tours](#)

## Activities ▾

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\$124,896

> See more

Overdue Sales Invoice Amount

\$0

> See more

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1

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Average Collect... Days

15.6

>

Outstanding V... Invoices

13

>

## Camera

[Create Incoming... from Camera](#)

## Banner

### Purpose

Make people feel expected and welcome.  
Sets the stage for what's next.

### Function

Displays at the time of sign-in when a user has “guided experience” items assigned.

### Guidelines

It's for special events only, such as first sign-in, core setup tasks and upgrade. It shouldn't appear to a user more than 1-2 times/year.

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⌚ 2 minutes

[Start tour](#)[Skip for now](#)

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## Camera

[Create Incoming... from Camera](#)

## Checklist

### Purpose

Present a set of “guided experience items” to ensure a successful start with the product.

### Function

Displays the content that the user has been assigned based on their role such as page tours, spotlight tours, videos and setups.

### Guidelines

*Fewer is better, don't overwhelm!*

#### Your checklist:

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⌚ 2 minutes

[Start tour](#)

[Skip for now](#)

## What makes a **great** checklist ?

For trial/evaluation

Introduce your most important value proposition(s) with as little friction as possible for the user

**Do:**

- do consider the intended audience
- do start with a *simple* task/item
- do vary checklist contents (video, etc.)

**Don't:**

- don't overwhelm
- don't ask the user to set up anything

## What makes a **great** checklist ?

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#### Don't:

- don't overwhelm
- don't ask the user to set up anything

### For go-live/production

Get users ready for work! Provide checklist with any necessary setup, review, and learning options

#### Do:

- do provide *role-oriented* checklists
- do start with a simple task/item
- do pre-configure as much as possible

#### Don't:

- don't have more than 7 tasks/items
- don't set up features until needed

## Cronus Demo Co.

Customers Vendors

Get started

Here you  
can tryThe Cronus company  
evaluation, and the

## Activities

Sales This Month

\$9,866

&gt; See more

Ongoing Sales

Sales Quotes

14



Item Card



## 1001 · Swivel chair

Process

Item

Prices &amp; Discounts

Request Approval

More options



## Item

No. ....

Description ....

Blocked .....



Show more

## Inventory

Shelf No. ....

Quantity on Hand .....

Qty. on Purch. Order .....

Qty. on Prod. Order .....

Qty. on Component L...

## Share item details to Teams

This is an item card, where you manage information about a product or service. You can share information in cards with your colleagues through Microsoft Teams.

1 of 2

Next

Show more

## Costs &amp; Posting

Show more

## Cost Details

Costing Method .....

Standard Cost .....

Unit Cost .....

FIFO

0.00

2.632

## Posting Details

Gen. Prod. Posting Gr...

Tax Group Code .....

Inventory Posting Gr...

RETAIL

PESALE

PESALE

# Spotlight tour

## Purpose

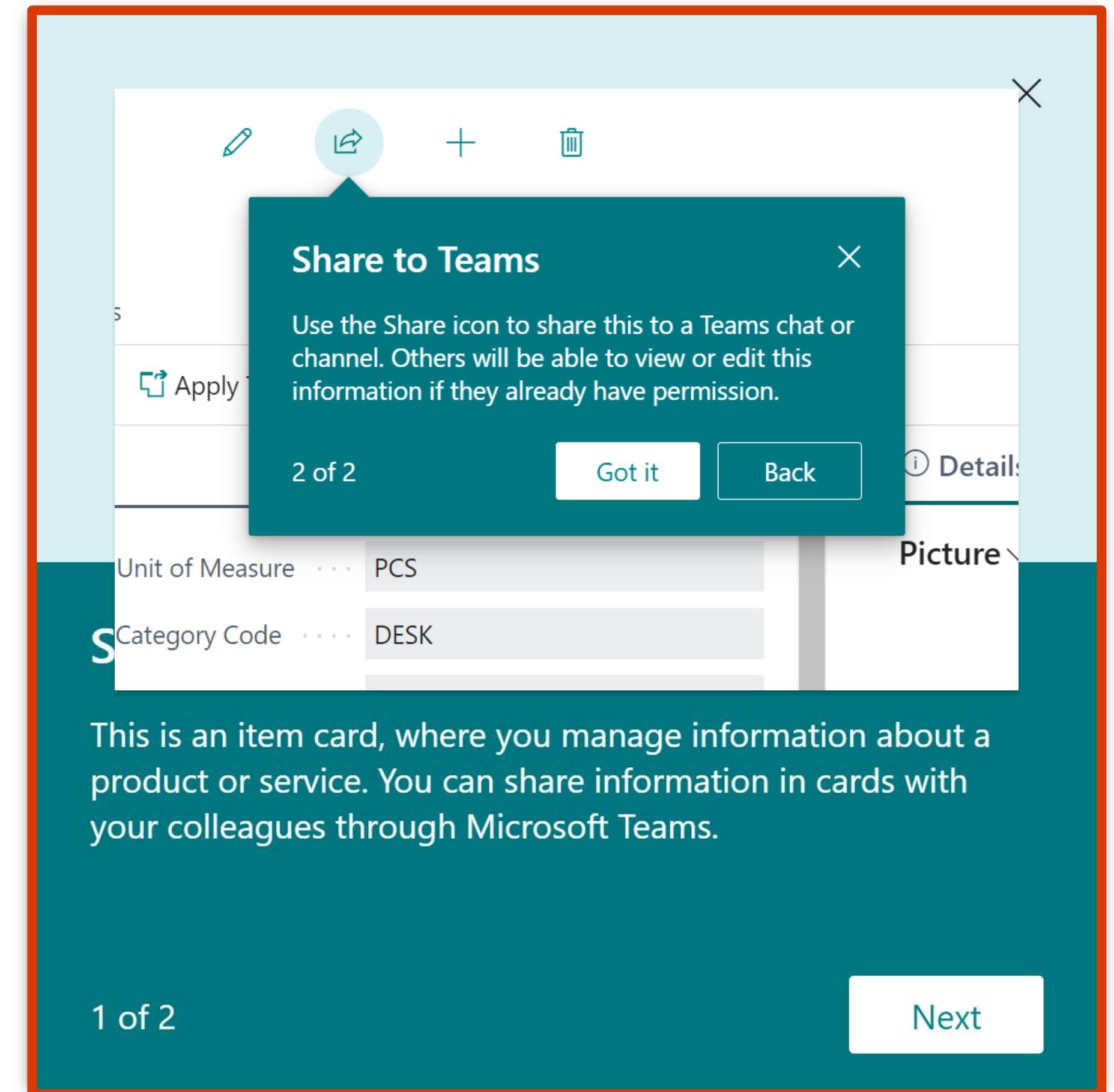
The tour highlights one key capability, currently Teams or Excel that will get customers excited.

## Function

Calls up the page and opens the spotlight tip with a customizable introduction text.

## Guidelines

Use an introductory text to explain the value of the feature *in scope of the chosen page*.



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Customers: All ▾

Search

New

Delete

Process ▾

Report ▾

New Document ▾

Customer ▾

Navigate ▾

...



No. ↑

Name

Responsibility Center

Location Code

Phone No.

Contact

[10000](#)

Adatum Corporation

Robert Townes

[20000](#)

Trey Research

Helen Ray

[30000](#)

School of Fine Art

Meagan Bond

[40000](#)

Alpine Ski House

Ian Deberry

[50000](#)

Relecloud

Jesse Homer

Details

Attachments (0)

**Customer Statistics**

Customer No. 10000

Balance (\$) 0.00

Balance (LCY) As Vendor 0.00

**Sales**

Outstanding Orders (\$) 20,196.08

Shipped Not Invd. (\$) 0.00

Outstanding Invoices (\$) 19,184.20

**Payments**

Payments (\$) 232,466.11

Refunds (\$) 0.00

Last Payment Receipt Date 3/24/2022

Total (\$) 39,380.28

Credit Limit (\$) 0.00

Overdue Amounts (\$) 0.00

Total Sales (\$) 60,672.80

Invoiced Prepayment Amoun... 0.00

**About customers**

Here you overview all registered customers, their balances, and the sales statistics. With [Customer Templates](#) you can quickly create new customers having common details defined by the template.

[Show Help](#)[Take a tour](#)

## Page teaching tip

### Purpose

Engage and educate the user about a page, *report* or *query*.

### Function

Appears on pages that have it defined.  
Offers choice to launch a tour. Can contain links to BC pages.

### Guidelines

Be brief. Be brief. Be brief. Focus on *why* this page exists, and important relationships to other entities.

### About customers



Here you overview all registered customers, their balances, and the sales statistics. With [Customer Templates](#) you can quickly create new customers having common details defined by the template.

[Show Help](#)

[Take a tour](#)

CRONUS USA, Inc.



Item Card



# 1928-S · AMSTERDAM Lamp

[Process](#) [Item](#) [Prices & Discounts](#) [Request Approval](#) [More options](#)

## Item

[Show more](#)[Details](#)[Attachments \(0\)](#)No. ..... 1928-S ...

Description ..... AMSTERDAM Lamp

Blocked .....

Type .....

Base Unit of Measure .....

Item Category Code .....

1 of 6

[Next](#)

### Describe the product or service X

This appears on the documents you create when buying or selling this item. You can create Extended Text with additional item description available to insert in the document lines.



## Inventory

Shelf No. ....

Quantity on Hand ..... 8 ...

Qty. on Purch. Order ..... 0

Qty. on Sales Order ..... 7

Stockout Warning ..... Default (Yes)

Unit Volume ..... 0.03

Over-Receipt Code .....

## Item Attributes ▼

Attribute	Value
Color	Red
Depth	30 CM
Height	60 CM

## Field or action teaching tip

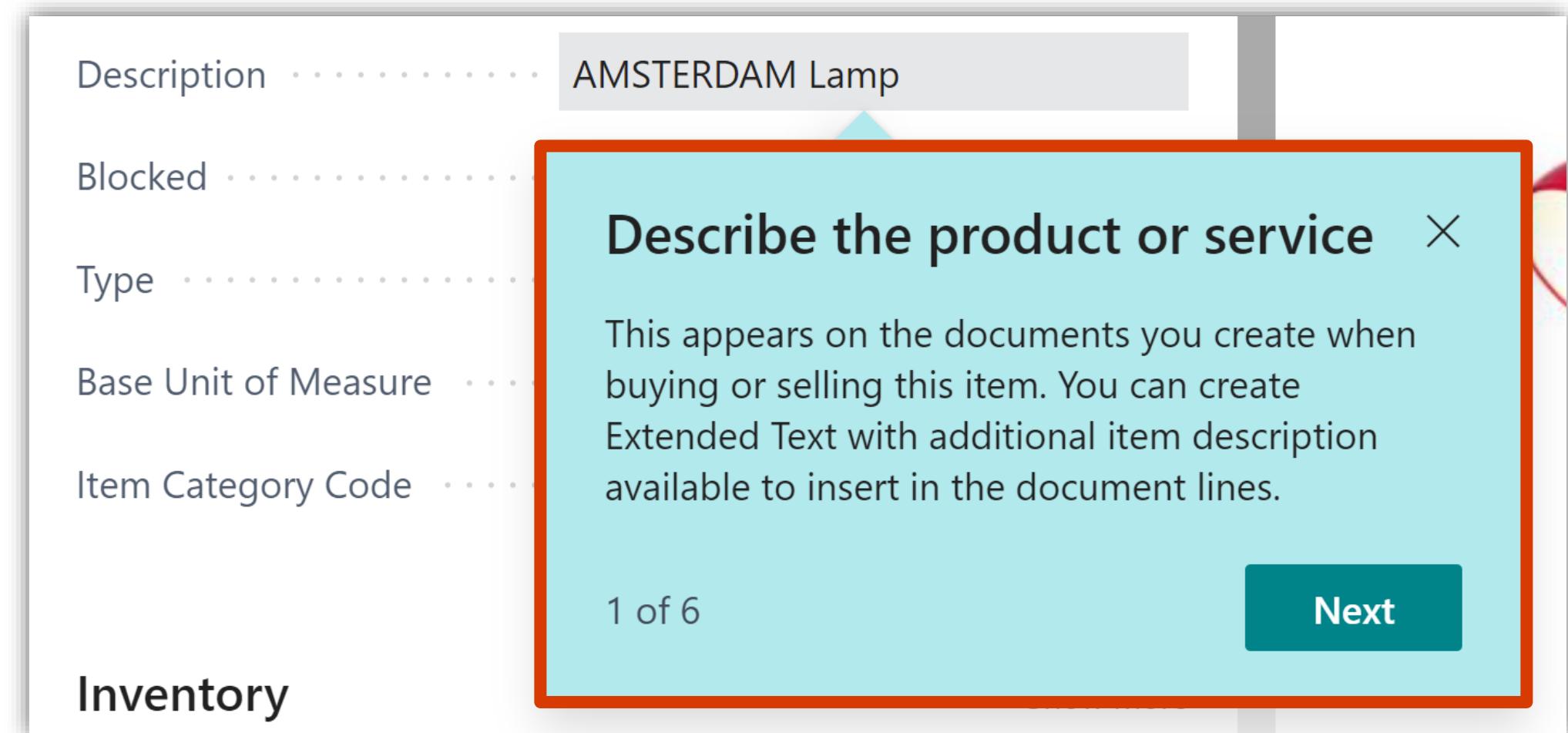
### Purpose

Point out particular fields or actions on a page to explain key concepts.

### Function

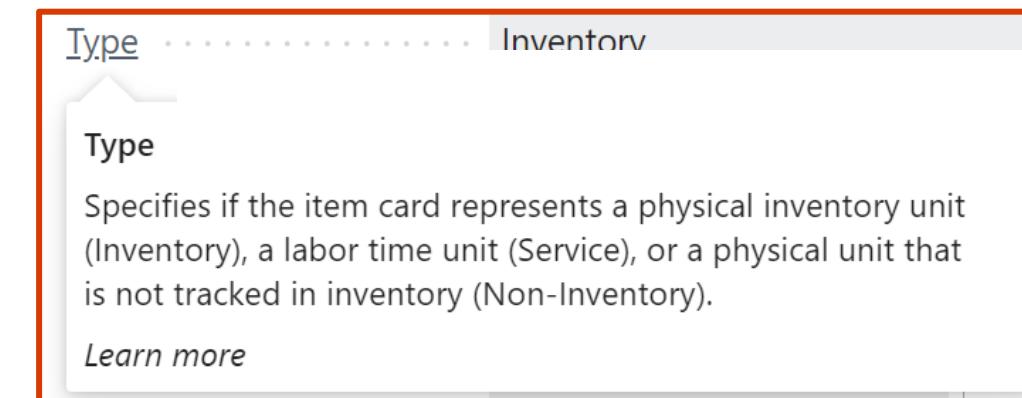
- Appear in sequence as a tour that the user can take.

- The tour *sequence* is defined by the fields' *order of appearance on the page*, not via AL or metadata.



### Guidelines

- Max 3-4 teaching tips on a page.
- Do not use for process guidance.
- Detailed info should be in tooltips.



# Actionable errors to unblock users

## Purpose

Allows users to learn while doing. Lets users unblock themselves when encountering errors.

## Function

Actionable errors can offer a way forward, such as a shortcut to open a relevant page or table; or can recommend a correct value.

ed	Qty. to Invoice	Quantity Invoiced	Qty. to
-	<span>x</span> 12	-	-

Qty. to Invoice isn't valid

You can invoice for up to 8 units.

[Set value to 8](#)

unt	Account No.	Account Name
-	<span>x</span> 1902	-

You can't modify a record pending approval. Add a comment or reject the approval to modify the record.

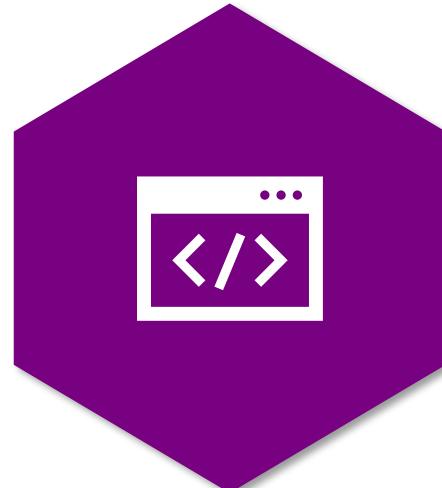
[Show comments](#)

[Reject approval](#)

## Actions for you!

### Profile your web site visitors

So you can deliver the best match experience



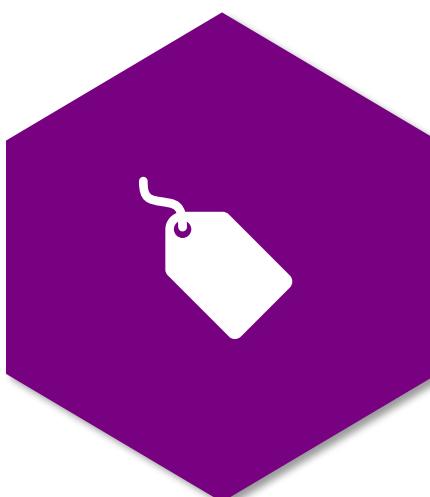
### Build an onboarding app

Fork the Onboarding Sample app from Github and use it as a template



### Check the documentation

<https://aka.ms/BCOnboarding>



### Consider your offers

When you bundle licenses, implementation and support into a monthly fee, it's easy for customers to know TCO



### Help customers through the journey

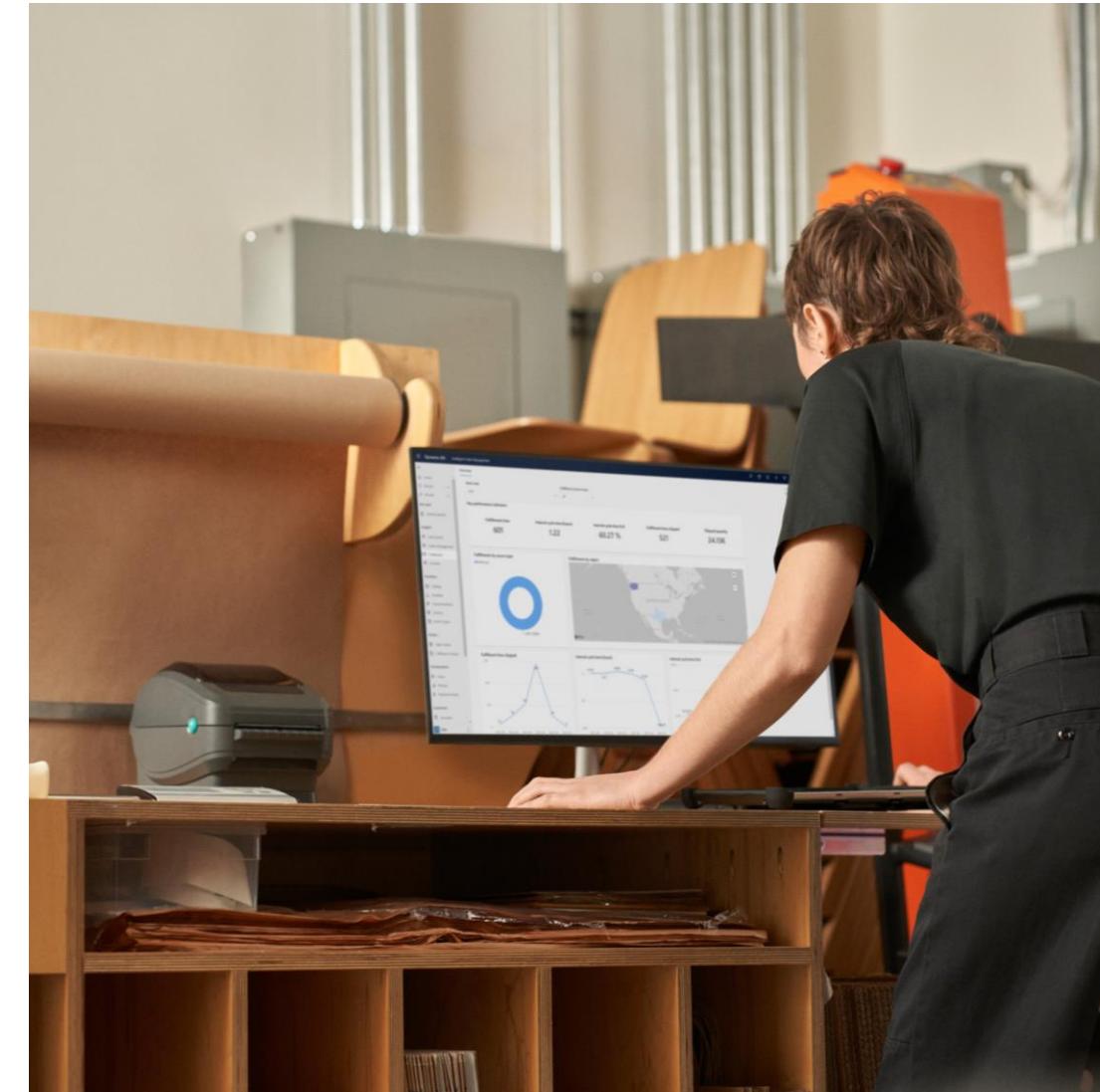
Use telemetry to check if a customer is stuck and reach out proactively, and use it for upselling



# Watch other relevant launch event sessions



Session  
[What's new: Productivity features in the web client](#)



Session  
[What's new: Add existing table fields to pages](#)

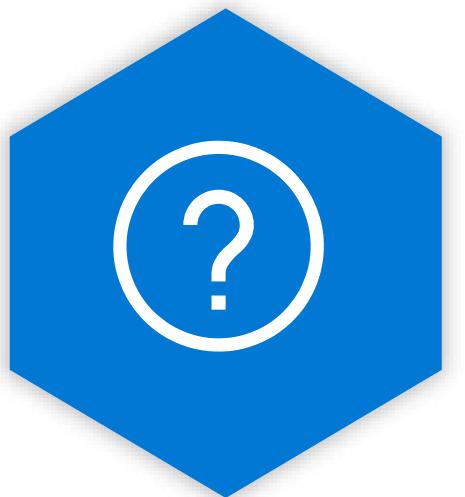


Session  
[What's new: Telemetry](#)

General Business Central resources, [learn more!](#)

**Join the  
conversation**

[twitter.com/  
MSDyn365BC](https://twitter.com/MSDyn365BC)



**Have a  
question?**

[aka.ms/BCYammer](https://aka.ms/BCYammer)

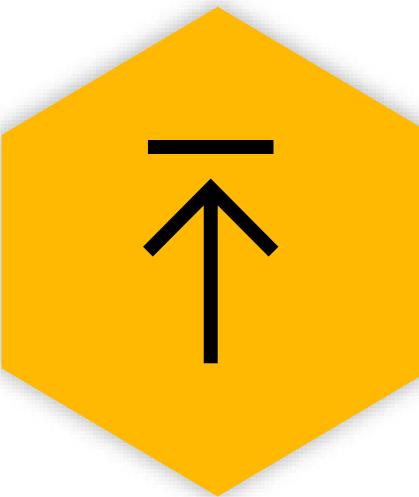


**Looking for  
resources?**

[aka.ms/BCAll](https://aka.ms/BCAll)

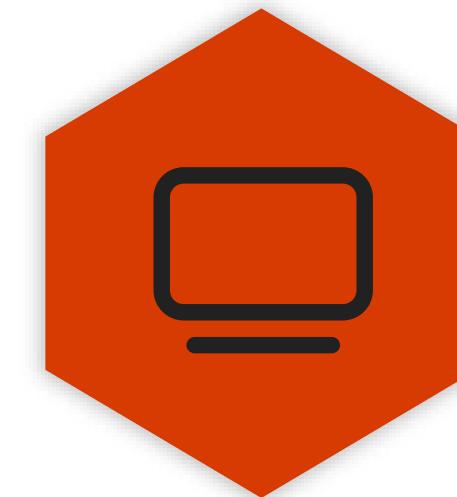
**Submit  
your ideas**

[aka.ms/BCIideas](https://aka.ms/BCIideas)



**Join the office  
hours**

[aka.ms/BCOfficeHours](https://aka.ms/BCOfficeHours)



Thank you