



Microsoft Cloud for Retail in a Day

Lab 03: Dynamics 365 Commerce and Microsoft Teams integration

Step-by-Step Lab

60 minutes

March 2022

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Overview

Retail workforce management helps you digitize managerial tasks like store scheduling.

With retail workforce management, manage shifts seamlessly, easily connect to your existing workforce, simplify task dissemination, and help your team complete tasks more easily.

With retail workforce management, offer **seamless scheduling**:

Manage shifts seamlessly – enable managers to easily create and manage their team's schedule and let employees set their availability and easily adjust schedules to fluctuating business needs

Track time & attendance with easy clock in and out with geo detection and digital time tracking sheets.

Enable Shifts connectors with workforce management systems for real-time visibility into labor scheduling, time and attendance, and store operation scheduling in a single interface—ensuring a seamless and accurate scheduling experience

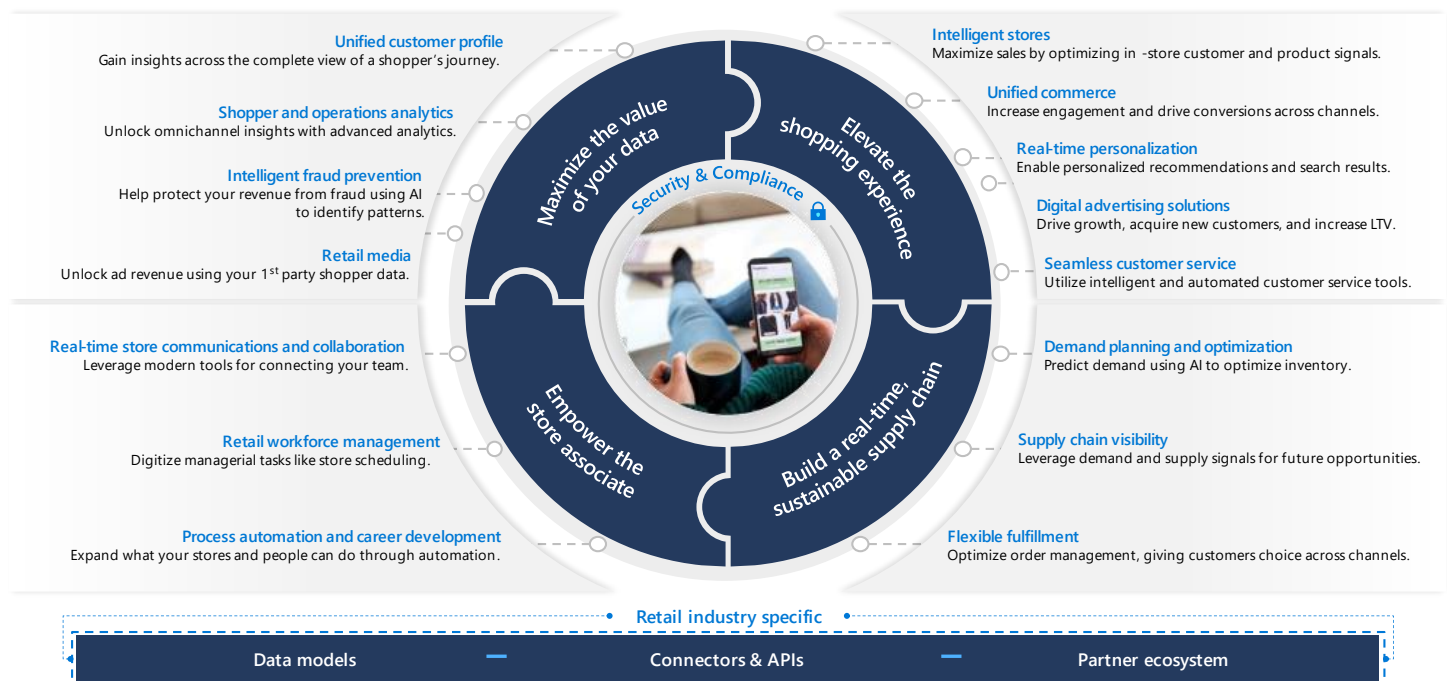
Also, experience **task management made easy**:

Enable corporate employees like corporate communications and retail operations team easily create, distribute and track task assignments to targeted location.

Equip managers to manage tasks regionally and assign them to the right individuals in the store

Provide frontline workers from executing tasks locally with clear, detailed directions from HQ/Operations.

Capabilities connecting your customers, your people, and your data

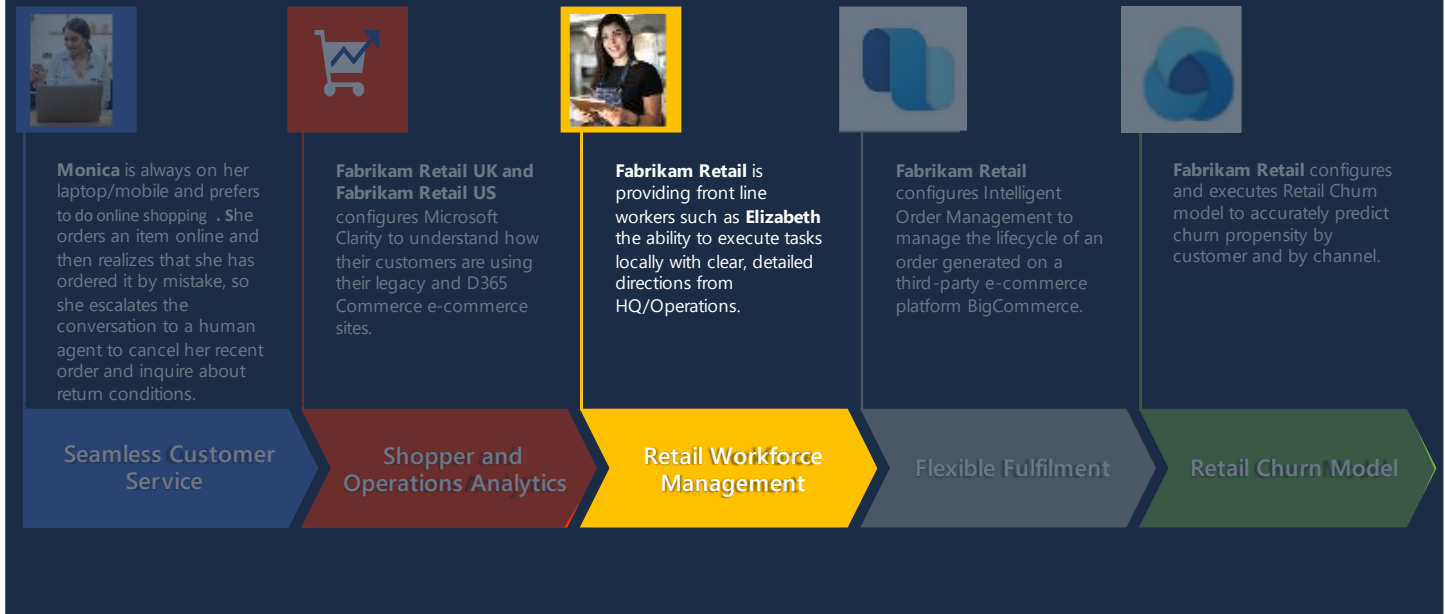


Learning Objectives

Retail Story

Retail Story

Differentiated needs. Tailored experiences.



This lab will focus on the retail story of Fabrikam Retail.

In the following exercises, you will be playing the role of a **System Administrator**, a **Retail Communications Manager**, **Store Manager** and a **Retail Employee**:

- In Exercise 1, you will be creating an App registration and setup the required permissions.
- In Exercise 2, you will be enabling the integration between D365 Commerce and Teams Task management app.
- You will then play the role of a Retail communications manager who will login into Teams and publish a task "Setup Women's Spring Lineup Display" as part of Exercise 3 – Task 1.
- Later, in Exercise 3 – Task 2, you will play the role of a Store manager who will login into D365 Commerce POS application to view the tasks and assign the new task to a store employee.
- In Exercise 3 – Task 3, you will play the role of a store employee who will view the assigned tasks and marks it as complete once the task is completed.

Prerequisites

- D365 Commerce
- Microsoft Teams
- [Create an Azure Active Directory app](#)

Exercise 1: App Registration and Permissions

Note: If you are in an instructor led lab then please skip this exercise and tasks as this has been completed by your instructor.

Dynamics 365 Commerce is integrating with **Microsoft Teams** to help customers and their employees improve productivity by synchronizing task management between the two applications. The seamless task management that Commerce and Teams integration provides let store managers and employees create task lists, assign tasks to multiple stores, and track the status of tasks across stores, from either application.

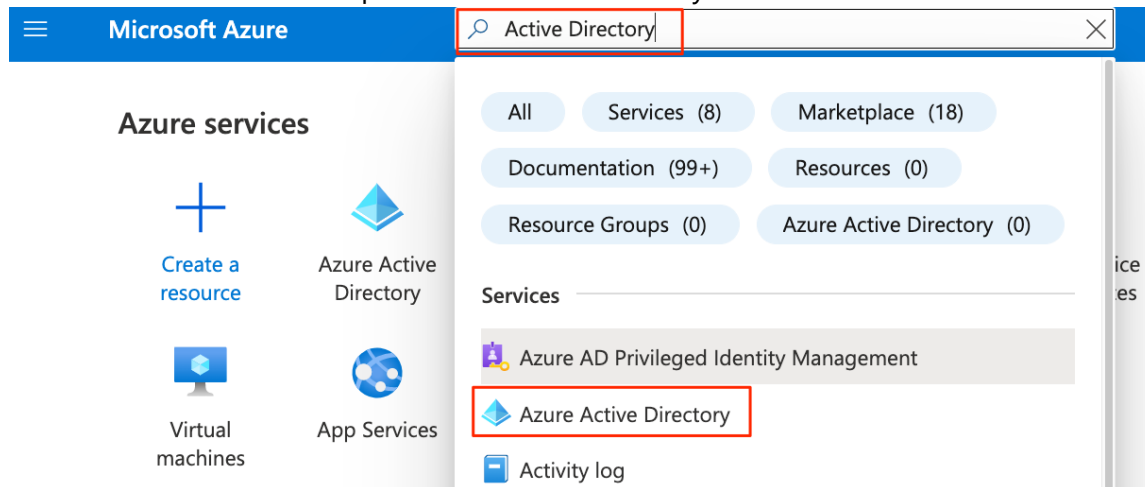
Before you can enable Microsoft Teams integration with Commerce, you must register the Teams application with your tenant in the Azure portal.

In this exercise, you will be doing the following:

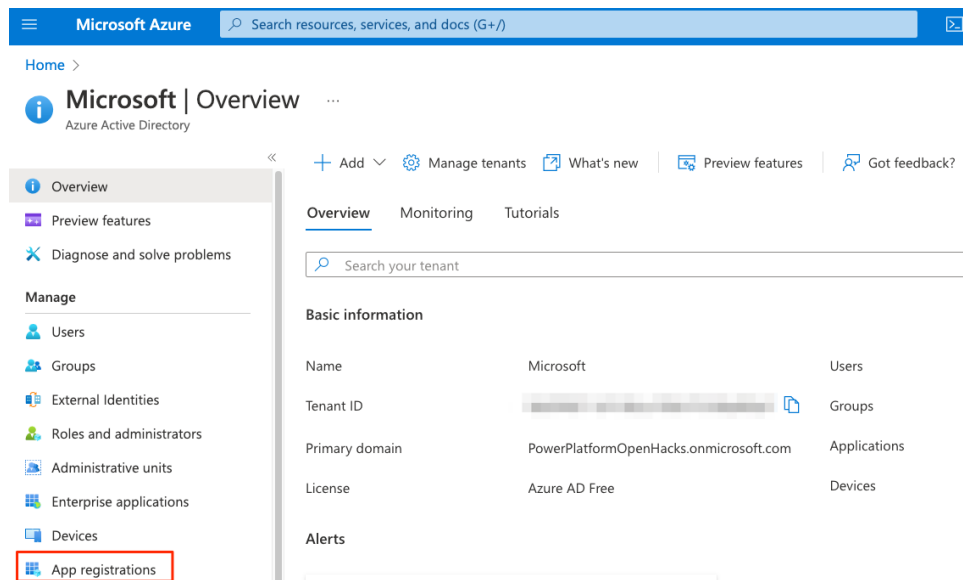
1. App Registration with Azure Active Directory
2. Add a Secret to the registered App.
3. Adding API permissions to the registered App
4. Configure registered application to expose a web API
5. Configure a client application to access a web API

Task 1: App Registration with Azure Active Directory

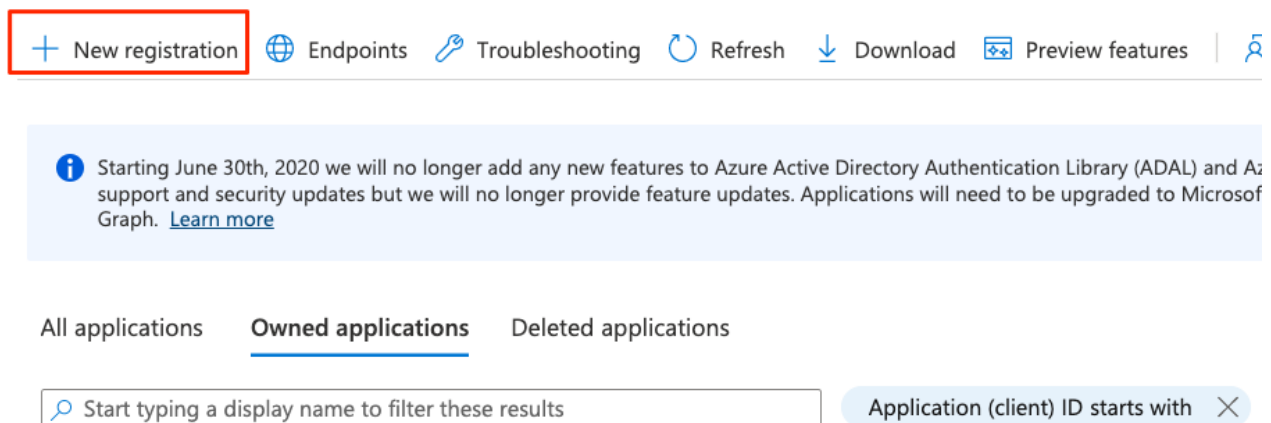
1. In the Azure Portal search bar, search for "Active Directory", the Azure Active Directory will show up in the services. Choose it to Open Azure Active Directory.



2. In the Azure Active Directory, Click on App registrations



3. In the App registrations, click on add New registration.



4. Name the App registration as "Microsoft Teams Commerce"
5. Under Supported account types: Choose "Accounts in this organizational directory only" (Microsoft only – Single tenant)
6. Under Redirect URI: Select Web and provide the Commerce Finance and Operations URL and add the "oath" suffix. The full URL should look like <https://fabrikam.sandbox.operations.dynamics.com/oath>

- Click in Register to complete.

Microsoft Azure Search resources, services, and docs (G+)

Home > Microsoft >

Register an application

* Name

The user-facing display name for this application (this can be changed later).

Microsoft Teams Commerce

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (Microsoft only - Single tenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- ☐ Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web https://mcriad.sandbox.operations.dynamics.com/oauth

Important

- Save the Application (client) ID in the text editor of your preference. It will be used in later steps.

Microsoft Azure Search resources, services, and docs (G+)

Home > Microsoft >

Microsoft Teams Commerce

Search (Cmd+/) Delete Endpoints Preview features

Overview

Quickstart

Integration assistant

Manage

- Branding & properties
- Authentication
- Certificates & secrets
- Token configuration
- API permissions

Essentials

Display name

Microsoft Teams Commerce

Application (client) ID

1446f7062a

Object ID

5ce8a0

Directory (tenant) ID

cf

Supported account types

My organization only

Task 2: Add a Secret to the registered App

- In the Microsoft Teams Commerce registered App. Click in Certificates & Secrets

Microsoft Azure Search resources, services, and docs (G+ /)

Home > Microsoft >

Microsoft Teams Commerce

Search (Cmd+ /) << Delete Endpoints Preview features

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 - Branding & properties
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 - Certificates & secrets**
 - Token configuration
 - API permissions

Essentials

Display name
[Microsoft Teams Commerce](#)

Application (client) ID
[redacted] 7062a

Object ID
[redacted]

Directory (tenant) ID
[redacted]

Supported account types
[My organization only](#)

2. Click Add New Client Secret

Microsoft Azure Search resources, services, and docs (G+ /)

Home > Microsoft > Microsoft Teams Commerce

Microsoft Teams Commerce | Certificates & secrets

Search (Cmd+ /) << Got feedback?

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 - App roles
 - Owners

Credentials enable confidential applications to identify themselves to the authentication service when receiving token location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a credential).

Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) **Client secrets (0)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as

+ New client secret

Description	Expires	Value ⓘ	Secret ID
No client secrets have been created for this application.			

3. In the **Description**, provide a name of your choice for the client secret and click **Add**.

Add a client secret



Description

secret

Expires

Recommended: 6 months



Important

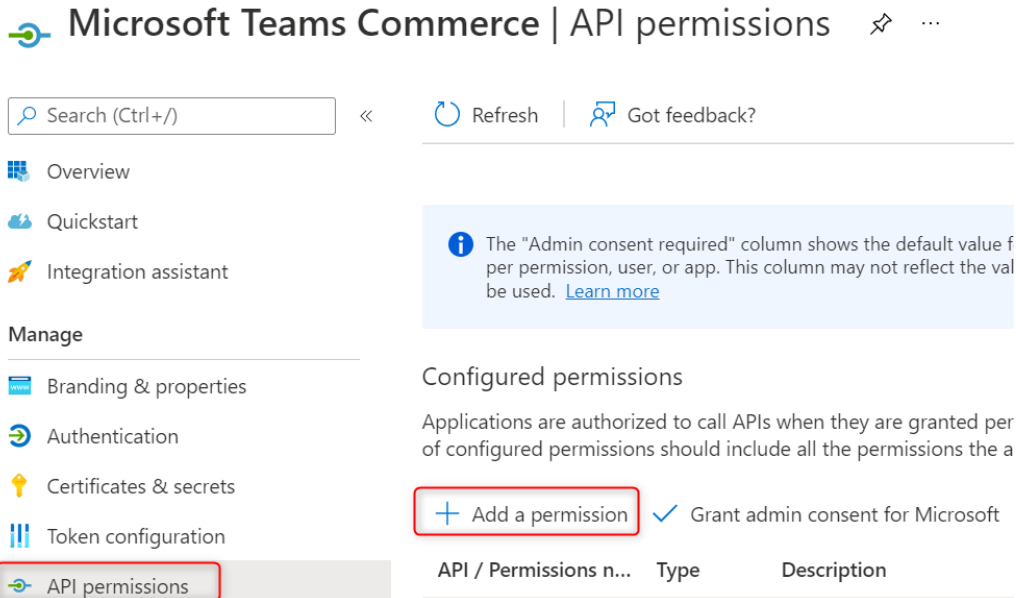
4. Copy the key value generated for the client secret and save it in a text editor of your choice. The client secret value will be used in future steps. After closing this window, it will not be possible to retrieve the key again and it will require generating a new client secret.

+ New client secret

Description	Expires	Value ⓘ	Secret ID
secret	8/15/2022	F807 [REDACTED] L...	532c8401-a628-41ad-a984-f3320d1d66

Task 3: Adding API permissions to the registered App

1. Click on **API permissions** in the left tab, then click on + **Add a permission**.



Microsoft Teams Commerce | API permissions

Search (Ctrl+/) << Refresh | Got feedback?

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API permissions

The "Admin consent required" column shows the default value for each permission, user, or app. This column may not reflect the value that will be used. [Learn more](#)

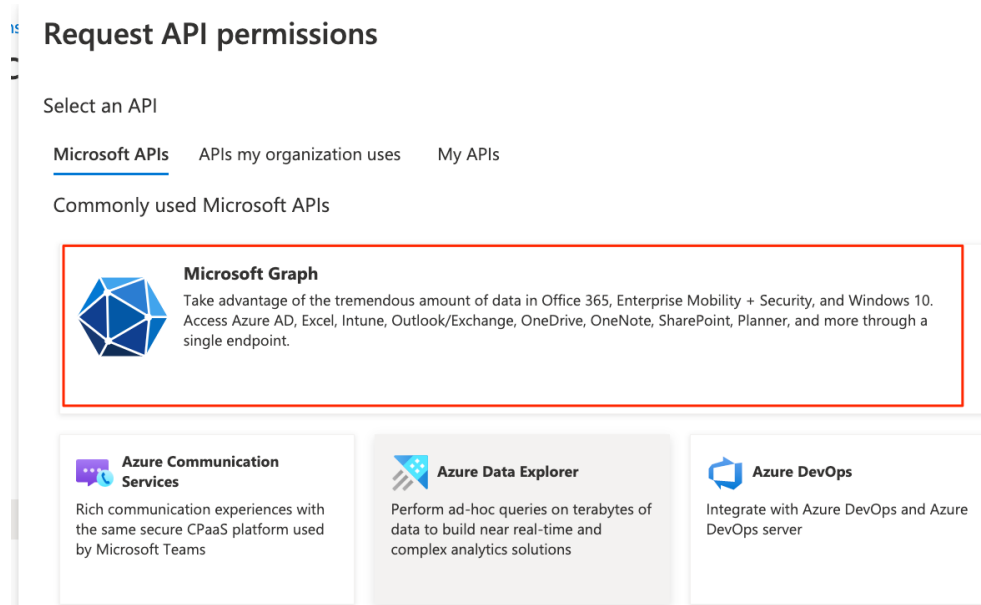
Configured permissions

Applications are authorized to call APIs when they are granted permissions. The permissions that should be included in the application's permissions should include all the permissions that the application uses.

+ Add a permission ✓ Grant admin consent for Microsoft

API / Permissions n...	Type	Description
------------------------	------	-------------

2. In the **Request API permissions** pop-up and select **Microsoft Graph**.




Request API permissions


Select an API

Microsoft APIs | APIs my organization uses | My APIs


Commonly used Microsoft APIs




Microsoft Graph
Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.



Azure Communication Services
Rich communication experiences with the same secure CPaaS platform used by Microsoft Teams



Azure Data Explorer
Perform ad-hoc queries on terabytes of data to build near real-time and complex analytics solutions



Azure DevOps
Integrate with Azure DevOps and Azure DevOps server

3. Select **Delegated permissions**, then in **Select permission** type **Group** to filter results.
4. Under **Group** and check **Group.ReadWrite.All**, then click **Add permissions** button.



Microsoft Graph

<https://graph.microsoft.com/> [Docs](#) [↗](#)

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

Select permissions

[expand all](#)



The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
▼ Group	
<input type="checkbox"/> Group.Read.All ⓘ Read all groups	Yes
<input type="checkbox"/> Group.ReadWrite.All ⓘ Read and write all groups	Yes
> GroupMember	
> PrivilegedAccess	
> UnifiedGroupMember	

5. Click on **+ Add permission** again to add additional permissions.

Home > Microsoft > Microsoft Teams Commerce

Microsoft Teams Commerce | API permissions

Search (Cmd+/) Refresh Got feedback?

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- Token configuration
- API permissions**

The "Admin consent required" column shows the default value for permission, user, or app. This column may not reflect the value in [more](#)

Configured permissions

Applications are authorized to call APIs when they are granted perm configured permissions should include all the permissions the applic

[+ Add a permission](#) ☒ Grant admin consent for Microsoft

API / Permissions na...	Type	Description
Microsoft Graph (1)		


6. In the Request API permissions pop-up and choose **Microsoft Graph**.

Request API permissions


Select an API

Microsoft APIs APIs my organization uses My APIs


Commonly used Microsoft APIs




Microsoft Graph
Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.



Azure Communication Services
Rich communication experiences with the same secure CPaaS platform used by Microsoft Teams



Azure Data Explorer
Perform ad-hoc queries on terabytes of data to build near real-time and complex analytics solutions



Azure DevOps
Integrate with Azure DevOps and Azure DevOps server

7. Select **Application permissions**

Request API permissions

< All APIs

Microsoft Graph
<https://graph.microsoft.com/> Docs

What type of permissions does your application require?

Delegated permissions
Your application needs to access the API as the signed-in user.

Application permissions
Your application runs as a background service or daemon without a signed-in user.

- With **Application permissions** selected, then in **Select permissions** search field type **Group** to filter results.
- Click in **Group** to expand and check **Group.ReadWrite.All**, then click **Add permissions** button.

Select permissions [expand all](#)

Group

Permission	Admin consent required
> Calls	
▼ Group (1)	
<input type="checkbox"/> Group.Create ⓘ Create groups	Yes
<input type="checkbox"/> Group.Read.All ⓘ Read all groups	Yes
<input checked="" type="checkbox"/> Group.ReadWrite.All ⓘ Read and write all groups	Yes
> GroupMember	
> PrivilegedAccess	

- In API permissions, click + Add Permission.

Home > Microsoft > Microsoft Teams Commerce

Microsoft Teams Commerce | API permissions

⌵ ⋮

Search (Cmd+/) << Refresh Got feedback?

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ⓘ

The "Admin consent required" column shows the default value for permission, user, or app. This column may not reflect the value in [more](#)

Configured permissions

Applications are authorized to call APIs when they are granted perm
configured permissions should include all the permissions the applic

+ Add a permission

✓ Grant admin consent for Microsoft

API / Permissions na...	Type	Description
▼ Microsoft Graph (1)		

12. In the **Request API permissions** pop-up, select **APIs my organization uses** tab, then search for **Microsoft Teams Retail Service** and click on it.

Request API permissions ×

Select an API

Microsoft APIs **APIs my organization uses** My APIs


Apps in your directory that expose APIs are shown below

Name	Application (client) ID
Microsoft Teams Retail Service	75efb5bc-18a1-4e7b-8a66-2ad2503d79c6

13. Select **Delegated permissions**

Request API permissions ×

[< All APIs](#)

 **Microsoft Teams Retail Service**
<https://retailservices.teams.microsoft.com>

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

14. Click on **TaskPublishing** to expand, check **TaskPublishing.ReadWrite.All**, then click **Add permissions** button.

Select permissions

[expand all](#)

Start typing a permission to filter these results

i The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
✓ PraiseBadges	
<input type="checkbox"/> PraiseBadges.ReadWrite.All ⓘ PraiseBadges.ReadWrite.All	Yes
✓ TaskPublishing (1)	
<input type="checkbox"/> TaskPublishing.Read.All ⓘ Allow reading of task publications	Yes
<input checked="" type="checkbox"/> TaskPublishing.ReadWrite.All ⓘ Allow management of task publications	Yes

Task 4: Configure registered application to expose a web API

1. In Azure Portal go to **Azure Active Directory**
2. **App registrations**, and then select your API's app registration.

[+ New registration](#) [🌐 Endpoints](#) [🔧 Troubleshooting](#) [🔄 Refresh](#) [⬇ Download](#) [...](#)

[All applications](#) **[Owned applications](#)** [Deleted applications](#)

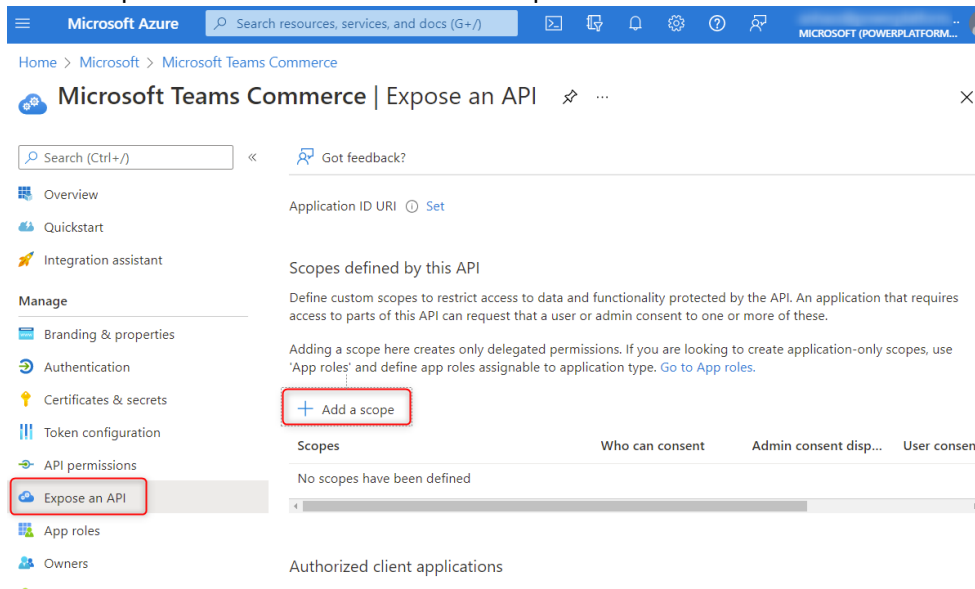
Start typing a display name to filter the... [Application \(client\) ID starts with](#) [✕](#) [+ Add filters](#)

3 applications found

Display name	Application (client) ID	Created on	Certificates & secrets
MT Microsoft Teams Commerce	6b5febd9-a64b-4420-...	2/14/2022	✓ Current

Display name	Application (client) ID	Created on	Certificates & secrets
MT Microsoft Teams Commerce	6b5febd9-a64b-4420-...	2/14/2022	✓ Current

4. Select Expose an API and then Add a scope.



5. You can use the default value provided, which is in the form `api://<application-client-id>`, or specify a more readable URI like `https://contoso.com/api`.

Add a scope



You'll need to set an Application ID URI before you can add a permission. We've chosen one, but you can change it.

Application ID URI * ⓘ

api://6b5febd9-a64b-4420-9755-e81446f7062a

6. Click save and Continue
7. In Add a Scope page fill the form with the following values:

Add a scope



Scope name * ⓘ
Employees.Read.All ✓
api://6b5febd9-a64b-4420-9755-e81446f7062a/Employees.Read.All

Who can consent? ⓘ
Admins and users Admins only

Admin consent display name * ⓘ
Read-Only Access to records ✓

Admin consent description * ⓘ
Allow the Application to have read-only access on the data ✓

User consent display name ⓘ
Read Only Access ✓

User consent description ⓘ
Allow the application to have read-only access on the data

State ⓘ
Enabled Disabled

8. Add another scope by clicking in Add Scope and use the following values.



Scope name	Employees.Write.All
Who can consent	Admins only
Admin consent display name	Write access to records
Admin consent description	Allow the application to have write access to all Employee data.

9. Leave the remaining fields empty and make sure the state is set to Enabled.

10. Click Add Scope

11. The final result should be similar to the picture below.

+ Add a scope

Scopes	Who can consent	Admin consent display...	User consent display n...	State
api://6b5febd9-a64b-4420-9755-e81446f7062a/Emp...	 Admins and users	Read-only access to Empl...	Read-only access to your...	Enabled
api://6b5febd9-a64b-4420-9755-e81446f7062a/Emp...	 Admins only	Write access to Employee...		Enabled

Task 5: Configure a client application to access a web API

1. In Azure Portal go to **Azure Active Directory**
2. **App registrations**, and then select your API's app registration.
3. Select API permissions, Add a permission, and then My APIs.

Microsoft Azure

Home > App registrations > Microsoft Teams Commerce

Microsoft Teams Commerce | API permissions

Search (Ctrl+/) Refresh Got feedback?

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Roles and administrators | Preview

The "Admin consent required" column shows the default value for an organization. However

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for Microsoft

API / Permissions name	Type	Description
Microsoft Graph (1)		
User.Read	Delegated	Sign in and read user profile

To view and manage permissions and user consent, try [Enterprise applications](#).

4. In My APIs select the Application ID registered in the previous step.

Request API permissions

Select an API

Microsoft APIs

APIs my organization uses

My APIs

Applications that expose permissions are shown below

Name	Application (client) ID
Microsoft Teams Commerce	-4420-9755-e81446f7062a

5. Under Select permissions, expand the resource whose scopes you defined for your web API, and select the permissions.

- If you used the example scope names specified in the previous quickstart, you should see Employees.Read.All and Employees.Write.All.

Request API permissions

< All APIs

Microsoft Teams Commerce
api://6b5febd9-a64b-4420-9755-e81446f7062a

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

Select permissions

expand all

Start typing a permission to filter these results

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
Employees (2)	
<input checked="" type="checkbox"/> Employees.Read.All ⓘ Read-only access to Employee records	No
<input checked="" type="checkbox"/> Employees.Write.All ⓘ Write access to Employee records	Yes

- Click Add Permissions

Task 7: Add Delegated permissions to access Microsoft Graph

- In Azure Portal go to Azure Active Directory
- App registrations, and then select your API's app registration.

+ New registration Endpoints Troubleshooting Refresh Download ...

All applications **Owned applications** Deleted applications

Start typing a display name to filter the... Application (client) ID starts with Add filters

3 applications found

Display name	Application (client) ID	Created on	Certificates & secrets
Microsoft Teams Commerce	6b5febd9-a64b-4420-...	2/14/2022	Current

- Select API permissions, Add a permission, and then Microsoft Graph

Microsoft Azure

Home > App registrations > Microsoft Teams Commerce

Microsoft Teams Commerce | API permissions

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Applications are authorized to call APIs when they are granted permissions by users/admins all the permissions the application needs. [Learn more about permissions and consent](#)

[+ Add a permission](#) ☒ Grant admin consent for Microsoft

API / Permissions name	Type	Description
Microsoft Graph (1)		
User.Read	Delegated	Sign in and read user profile

To view and manage permissions and user consent, try [Enterprise applications](#).


4. Choose Microsoft Graph.

Request API permissions

Select an API

Microsoft APIs APIs my organization uses My APIs

Commonly used Microsoft APIs


**Microsoft Graph**
Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

5. Select Delegated permissions.

Request API permissions

×

< All APIs

 **Microsoft Graph**
<https://graph.microsoft.com/> [Docs](#)

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

6. In Select Permissions search for email

7. Under Permission, check email

Select permissions

[expand all](#)

i The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
▼ OpenId permissions (1)	
<input checked="" type="checkbox"/> email ⓘ View users' email address	No

8. In Select Permissions search for offline_access

9. Under Permission, check offline_access

Select permissions

[expand all](#)

i The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
▼ OpenId permissions (1)	
<input checked="" type="checkbox"/> offline_access ⓘ Maintain access to data you have given it access to	No

10. In Select Permissions search for openid

11. Under Permission, check openid

Select permissions

[expand all](#)

i The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
▼ OpenId permissions (1)	
<input checked="" type="checkbox"/> openid ⓘ Sign users in	No

12. In Select Permissions search for profile

13. Under Permission, check profile

Select permissions expand all

i The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
<div> <div>▼</div> <div>OpenId permissions (1)</div> </div> <div> <input checked="" type="checkbox"/> <div> <div>profile ⓘ</div> <div>View users' basic profile</div> </div> </div>	No
<div> <div>></div> <div>OnPremisesPublishingProfiles</div> </div>	

14. Select Add permissions to complete the process.

Task 8: Add Application permissions to access Microsoft Graph

1. In Azure Portal go to Azure Active Directory
2. App registrations, and then select your API's app registration.

+ New registration
Endpoints
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All applications
Owned applications
Deleted applications

Application (client) ID starts with
×
Add filters

3 applications found

Display name	Application (client) ID	Created on	Certificates & secrets
<div>MT</div> <div>Microsoft Teams Commerce</div>	6b5febd9-a64b-4420-...	2/14/2022	<div>✓</div> <div>Current</div>

3. Select API permissions, Add a permission, and then Microsoft Graph

Microsoft Azure

Home > App registrations > Microsoft Teams Commerce

Microsoft Teams Commerce | API permissions

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The "Admin consent required" column shows the default value for an organization. However

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins all the permissions the application needs. [Learn more about permissions and consent](#)

[+ Add a permission](#) ☒ Grant admin consent for Microsoft

API / Permissions name	Type	Description
Microsoft Graph (1)		
User.Read	Delegated	Sign in and read user profile

To view and manage permissions and user consent, try [Enterprise applications](#).

4. Choose Microsoft Graph.

5. Under Request API permissions Select Application Permissions

Request API permissions

[All APIs](#)



Microsoft Graph

<https://graph.microsoft.com/> [Docs](#)

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

6. In Select Permissions search for files

7. Under Permission, check Files.Read.All

8. Select Add permissions to complete the process.

Select permissions [expand all](#)

files

Permission	Admin consent required
Files (1)	
<input checked="" type="checkbox"/> Files.Read.All ⓘ Read files in all site collections	Yes
<input type="checkbox"/> Files.ReadWrite.All ⓘ Read and write files in all site collections	Yes

> OnPremisesPublishingProfiles

Exercise 2: Enable Commerce and Teams Integration

Note: *If you are in an instructor led lab then please skip this exercise and tasks as this has been completed by your instructor.*

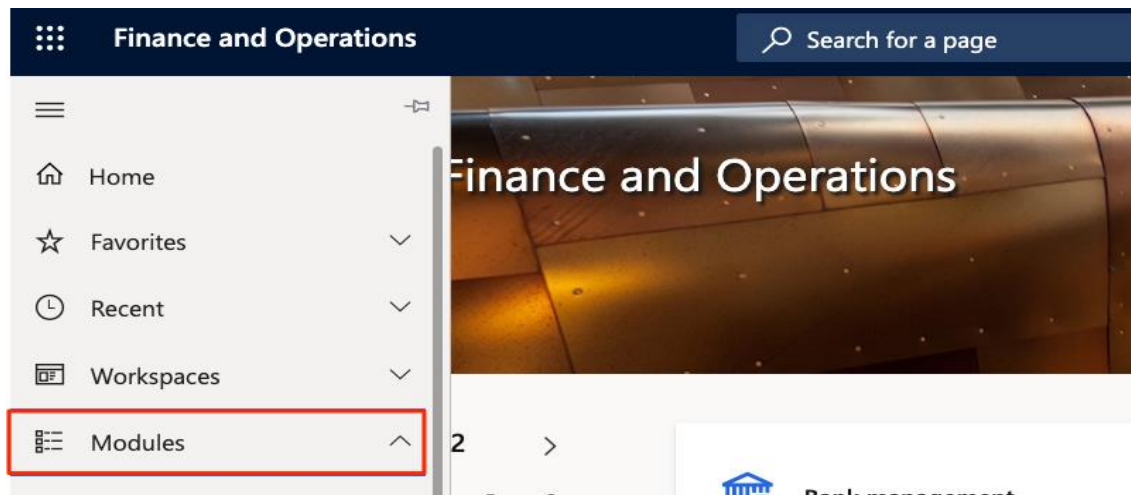
In this Lab, you learn how to enable Microsoft Dynamics 365 Commerce and Microsoft Teams integration.

In this exercise, you will be doing the following:

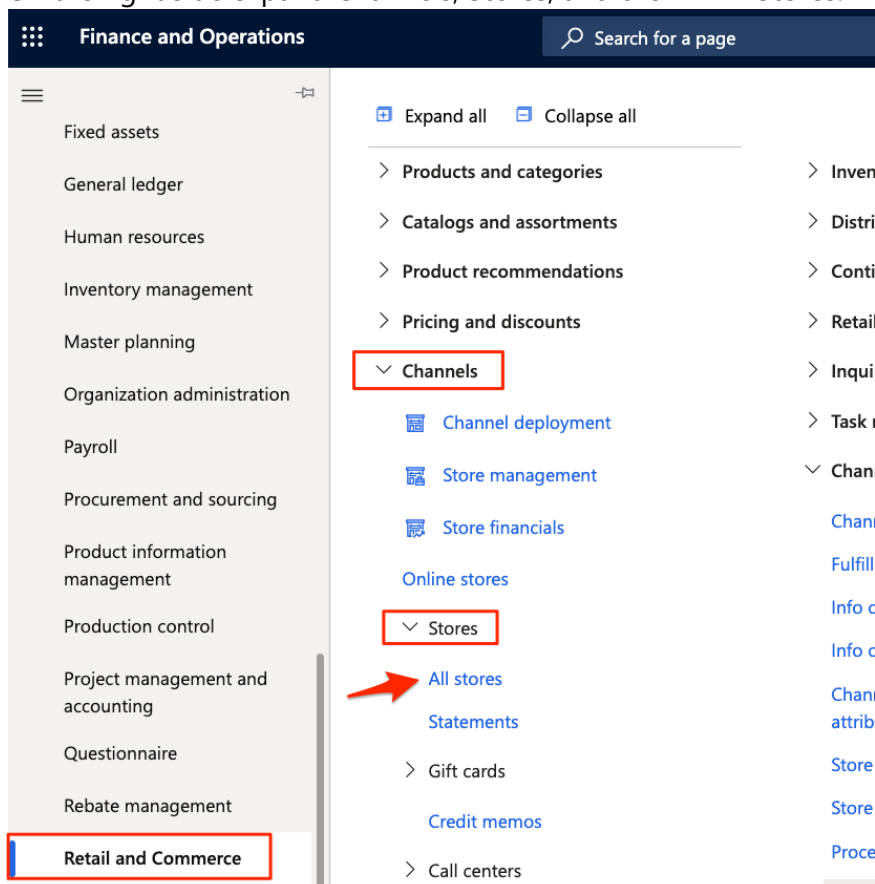
- Create an external identity for the worker in Commerce Finance and Operations.
- Add store manager to the Publisher Task Manager
- Provision Teams in Commerce Finance and Operations
- Validate Teams provisioning in the Teams admin center.
- Download Commerce organizational hierarchy to Teams.
- Install Microsoft Teams PowerShell module.
- Upload organization hierarchy to Teams
- Publish a test task list in Teams

Task 1: Create and external identity for the worker in Commerce Finance and Operations.

1. Log into Commerce Finance and Operations.
2. On the left side menu click in Modules



3. Scroll down in the list of options until you find **Retail and Commerce**.
4. On the right side expand Channels, Stores, and click in All Stores.



5. Click on the **Retail Channel id** for the first store on the list.

Finance and Operations

Edit + New Delete Configuration status Store Set up Options

Personalize: Always open for editing, Personalize this page, Add to workspace

Page options: Security diagnostics, Advanced filter or sort, Record info, Go to

Share: Get a link, Create a custom alert, Manage my alerts

Stores

Standard view

Filter

Retail Channel Id	Name	Channel type	Operating unit number
000001	Annapolis	Retail store	036
000002	Atlanta	Retail store	037
000003	Atlantic City	Retail store	038
000004	Boston	Retail store	039
000005	Burlington	Retail store	040
000006	Cambridge	Retail store	041

6. On the top menu, click in Set up and then Workers.

Finance and Operations

Edit + New Delete Configuration status Store Set up Options

Workers: Workers, Work shift list

Attribute groups: Channel attributes, Sales order attributes

Copy: Payment method to store, Cash declaration, Income/expense account

Sections: Copy all

Set up: Payment methods, Cash declaration, Modes of delivery, Income/expense account, Sections, Channel database

Stores | Standard view

ANNAPOL: Annapolis

General

IDENTIFICATION	POS REGISTER	SALES TAX
Retail Channel Id 000001	Functionality profile FN001	Tax identification number (TIN)
Name Annapolis	Inventory lookup No	Sales tax group MD
Store number ANNAPOL	PROFILES Channel profile Default	Prices include sales tax No
Operating unit number ---		Use destination-based tax

7. Find the employee who is the store manager. You can find the role details by clicking on the employee's name.

Finance and Operations Search for a page

Edit + New Delete As of date **Worker** Payroll Time Commerce General Options

Personnel actions: Change position, Enroll in benefits, Create eligibility event, Terminate, Benefit enrollment results, Change worker name, Change worker employment type

Position assignment: Worker position assignments, Add assignment, Edit assignment, End assignment, View in hierarchy

Versions: Changes timeline, Employment history, Name History

Personal information: Accommodations, Bank accounts, Bank account disbursements, Identification numbers, Injury or illness incidents, Labor unions, Loan, Persc, Bene

Employees | ANNAPOL : ANNAPOLIS

Standard view

Filter

Name	Search name	Personnel number	Phone	Extension	Email address	Worker type
Chris Gallagher	Chris Gallagher	000205	425-555-5178	5178		Employee
Emma Harris	Emma Harris	000137	415-555-5038	5038		Employee
Renata Krausova	Renata Krausova	000155	425-555-5090	5090		Employee

8. After identifying the store manager, create an Azure Active Directory identity for the employee to be able to log in to Microsoft Teams. Click in **Commerce** and then **Create new identity**.

Finance and Operations

Edit + New Delete As of date Worker Payroll Time **Commerce** General Options

Set up: POS permissions

Media: Images

View: Transactions, Stores, Client book

External identity: **Create new identity**, Associate existing identity, Clear identity

Employees | ANNAPOL : ANNAPOLIS

Standard view

Filter

Name	Search name	Personnel number	Phone
Chris Gallagher	Chris Gallagher	000205	425-555-5178
Emma Harris	Emma Harris	000137	415-555-5038
Renata Krausova	Renata Krausova	000155	425-555-5090

9. In Alias, define a unique alias that is based on the worker's name. First letter of first name and last name is the naming conventions used in the example below.
10. The UPN will be filled automatically.
11. In the password field, define a strong password for the new identity.

Create new identity

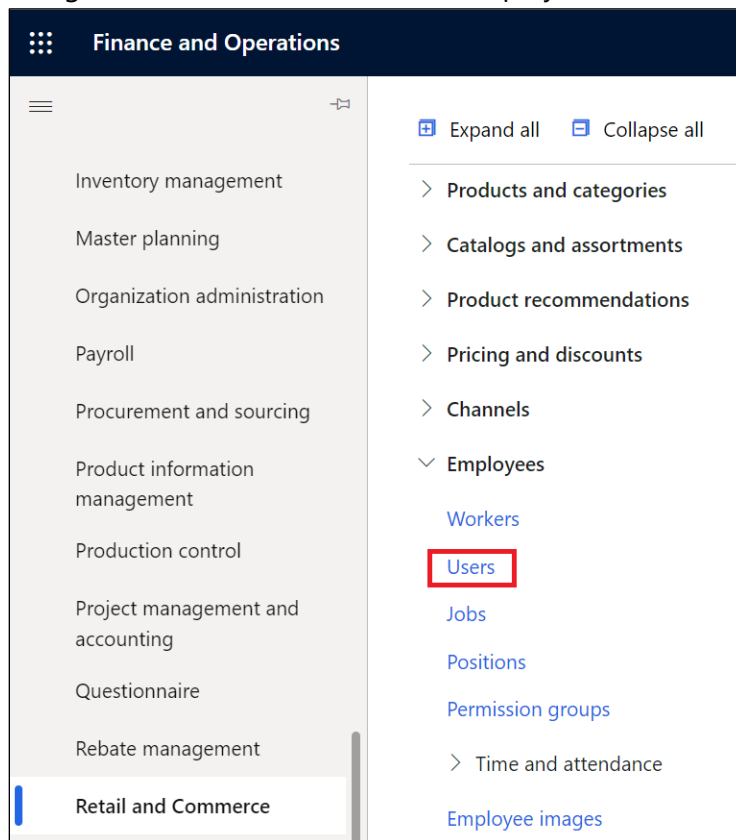
[Reset to default alias](#)

Alias	UPN	Password
cgallagher	cgallagher@powerplatformope...

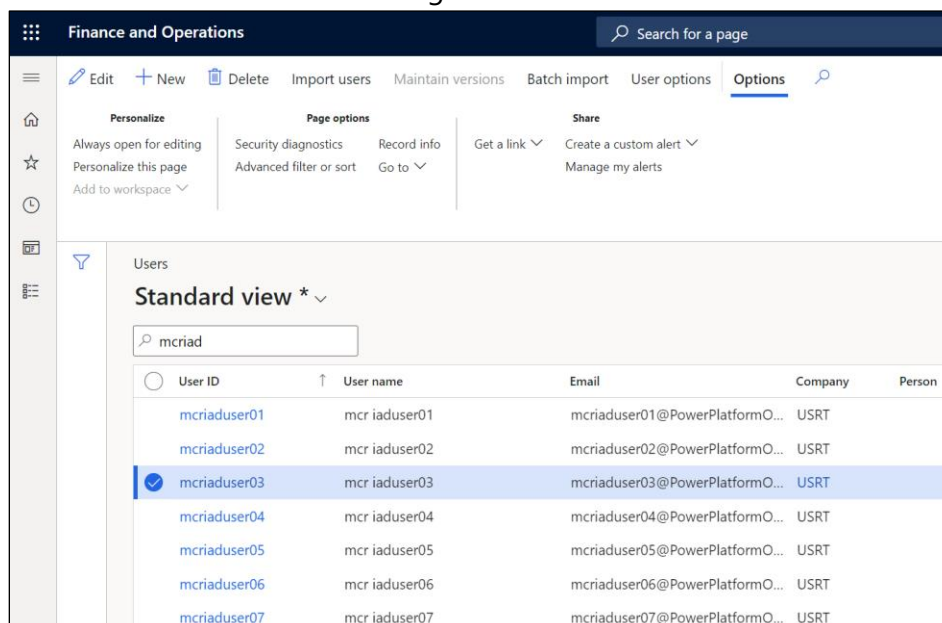
12. In the password field, define a strong password for the new identity.
13. Repeat the same steps for all the stores you want to integrate with Microsoft Teams.

Task 2: Assign store manager to the Retail Task Manager Role

1. Navigate to Retail and Commerce>Employees>Users



2. Select the User ID of Store Manager.



3. Select **+Assign Roles**.

Users | Standard view ▾

mcriaduser03 : mcr iaduse

User details

User ID
mcriaduser03

User name
mcr iaduser03

User's roles

[+ Assign roles](#) [Remove role](#) [Assign](#)

Roles

Retail store IT

Retail store manager

System administrator

System user

4. Select **Retail Task Manager** and then select **OK** button.

?

Assign roles to user

Select additional roles to assign to this user

COPY SETTINGS FROM USER OR GROUP

ID

Include organizations

Yes

<input type="radio"/>	Role name	Label	License	
<input type="radio"/>	Project timesheet user	Project timesheet user	Team Member	
<input type="radio"/>	Purchasing agent	Purchasing agent	SCM	
<input type="radio"/>	Purchasing Agent - Public Sector	Purchasing Agent - Public Sector	SCM	
<input type="radio"/>	Purchasing manager	Purchasing manager	SCM	
<input type="radio"/>	Quality control clerk	Quality control clerk	Team Member	
<input type="radio"/>	Quality control manager	Quality control manager	SCM	
<input type="radio"/>	Receiving clerk	Receiving clerk	Activity	
<input type="radio"/>	Recruiter	Recruiter	Operations	
<input type="radio"/>	Resource manager	Resource manager	Project	
<input type="radio"/>	Retail catalog manager	Retail catalog manager	Commerce	
<input type="radio"/>	Retail merchandising manager	Retail merchandising manager	Commerce	
<input type="radio"/>	Retail operations manager	Retail operations manager	Commerce	
<input type="radio"/>	Retail service	Retail service	Commerce	
<input checked="" type="radio"/>	Retail task manager	Retail task manager	Team Member	
<input type="radio"/>	Retail warehouse clerk	Retail warehouse clerk	Team Member	
<input type="radio"/>	Retail warehouse manager	Retail warehouse manager	Activity	
<input type="radio"/>	Revenue recognition manager	Revenue recognition manager	Operations	
<input type="radio"/>	Runtime customization power u...	Runtime customization power u...	Operations	
<input type="radio"/>	Sales clerk	Sales clerk	Activity	

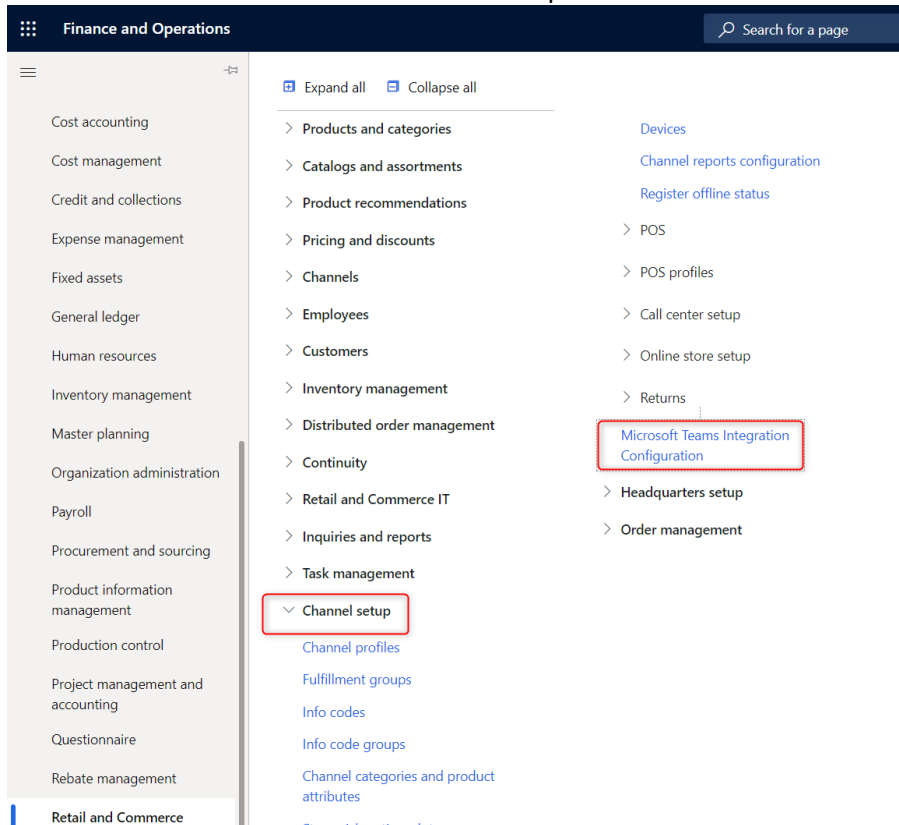
OK

Cancel

Congratulations! You have successfully assigned Retail Task manager role to the task manager.

Task 3: Provision Teams in Commerce Finance and Operations

1. Go to Retail and Commerce, Channel setup, and then Microsoft Teams Integration Configuration.



2. On the **Enable Microsoft Teams Integration** under settings, change to **Yes**.
3. Provide the **Application ID** sometimes referred to as Client ID, generated during the Application registration process.
4. Provide the **Application Key**. Application Key sometimes referred to as App Password, it is the value generated from the **Application Secret key** generated in the previous steps.
5. Click **Save** once you update all the values.

Finance and Operations Search for a page

Save Provision teams Download targeting hierarchy Options

Standard view

Microsoft Teams Integration Configuration

Settings

Enable Microsoft Teams Integration

☒ Yes

By enabling integration with Microsoft Teams, you consent to share your data with Microsoft Teams. Data shared with Microsoft Teams may reside in a different geography than your Dynamics 365 Commerce data, and may be subject to different compliance standards. Please consult the documentation (<https://aka.ms/d365commerceandteamsintegration>) to learn more about this feature. Your privacy is important to us. To learn more read our Privacy Statement (<http://aka.ms/privacy>).

Application ID

8175cd9f-320b-439c-962f-2ea11f...

Application key

.....

6. On the Action Pane, select **Provision teams**. A batch job that is named Teams provision is created.

Finance and Operations Search for a page

Edit Provision teams Download targeting hierarchy Options

Standard view

Microsoft Teams Integration Configuration

Settings

Enable Microsoft Teams Integration

☒ Yes

By enabling integration with Microsoft Teams, you consent to share your data with Microsoft Teams. Data shared with Microsoft Teams may reside in a different geography than your Dynamics 365 Commerce data, and may be subject to different compliance standards. Please consult the documentation (<https://aka.ms/d365commerceandteamsintegration>) to learn more about this feature. Your privacy is important to us. To learn more read our Privacy Statement (<http://aka.ms/privacy>).

Application ID

9f-320b-439c-962f-2ea119b8efb8

Application key

.....

7. Go to **System administration, Inquiries** and then **Batch jobs**, and find the most recent job that has the description **Teams provision**.

Finance and Operations Search for

- Credit and collections
- Expense management
- Fixed assets
- General ledger
- Human resources
- Inventory management
- Master planning
- Organization administration
- Payroll
- Procurement and sourcing
- Product information management
- Production control
- Project management and accounting
- Questionnaire
- Rebate management
- Retail and Commerce
- Revenue recognition
- Sales and marketing
- Service management
- System administration**

Expand all Collapse all

- Workspaces
 - System administration
 - Data management**
 - Feature management
 - Optimization advisor
- Users
 - Users
 - Online users
 - User groups
 - User requests
- Security
- Workflow
- Inquiries**
 - Deleted attachments
 - Document history
 - Database
 - Batch jobs**
 - Data cache
 - User log
 - License
 - Person search report
 - Security

- Batch group
- Active periods
- Batch class cor
- System job par
- Entity Store
- PowerBI.com c
- Deploy Power I
- Configure perfi
- System param
- Client perform
- Personalization
- Office app par
- Configure cros
- Azure Active D
- Key Vault para
- Certificate prof
- Throttling prior
- B2B Invitation
- Custom fields
- Alert rules
- Refresh elem
- Integration cor
- Business ev
- Database lo

8. Wait until this job has finished running.

Finance and Operations Search for a page

Edit New Delete Batch job history Recurrence Alerts BusinessEvents Generated files Change status Remove recurrence Copy batch job

Personalize Always open for editing Personalize this page Add to workspace

Page options Security diagnostics Advanced filter or sort Record info Go to

Share Get a link Create a custom alert Manage my alerts

Batch job

Standard view

Filter

Job ID	Status	Job description	Scheduled start date/time	Active period
68719946060	Ended	Full sync with schedule '1060' on channel database 'scuty5h...	2/10/2022 1:02:44 AM	
68719946059	Ended	Full sync with schedule '9999' on channel database 'scuty5h...	2/10/2022 12:43:19 AM	
68719945329	Ended	Teams provision	2/9/2022 4:03:35 AM	

Task 4: Validate Teams provisioning in the Teams admin center

1. Go to the [Teams admin center](#), and sign in as the administrator of your e-commerce tenant.
2. In the left navigation pane, select **Teams** to expand it, and then select **Manage teams**.
3. Confirm that one team has been created for each Commerce retail store.

Microsoft Teams admin center

Home Teams Manage teams Teams settings Teams policies Team templates Templates policies Teams update policies Teams upgrade settings Users Teams devices Teams apps Meetings Messaging policies Voice Locations Policy packages

Manage teams

Teams and channels are collections of people, content, and tools used for projects or outcomes within your organization. You can manage all the teams and channels, create new ones, and manage the existing ones. Go to the [Admin center > Groups](#) to manage Microsoft 365 groups. [Learn more](#)

Users summary

486	484	2
Total users	Internal users	Guests

+ Add Edit Archive Delete | 136 teams

Name	Standard channels	Private channels	Privacy
Atlanta	1	0	Private
Atlantic City	1	0	Private
Annapolis	1	0	Private
Boston	1	0	Private
Cambridge	1	0	Private
Burlington	1	0	Private

4. Select a team and confirm that store workers have been added to it as members.

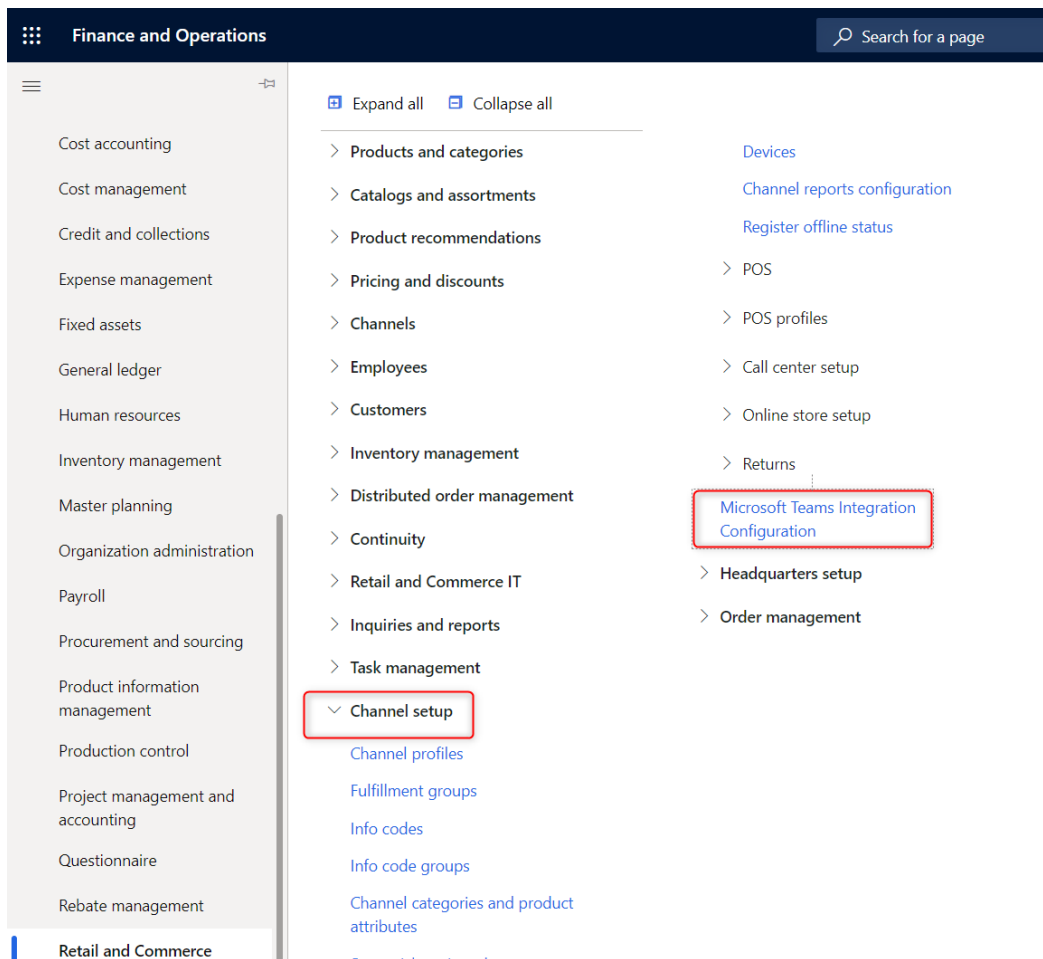
Members Channels Settings

+ Add X Remove | 5 items

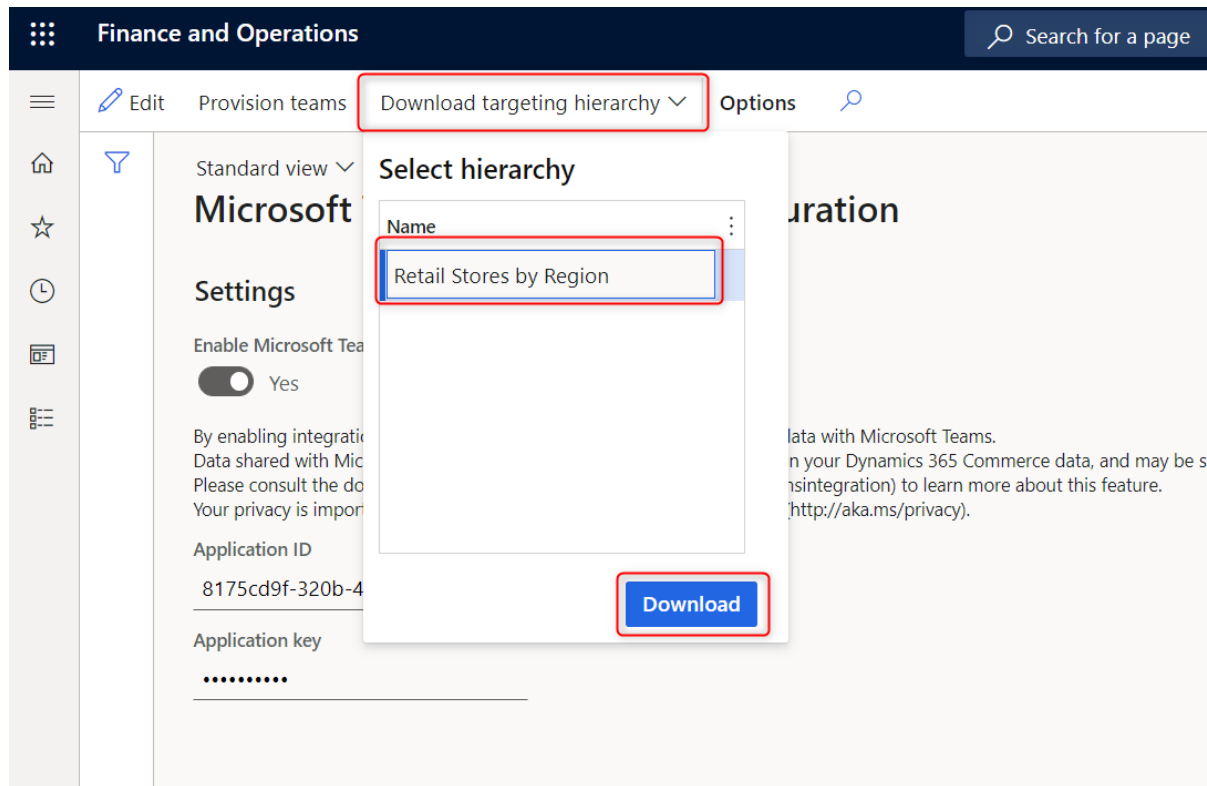
Display name	Username	Title	Location	Role
[Redacted]	[Redacted]	-	-	Owner
[Redacted]	[Redacted]	-	-	Owner
Chris Gallagher	[Redacted]	-	-	Member
Emma Harris	emmah@powerplatformo...	-	-	Owner
Renata Krausova	renatak@powerplatformo...	-	-	Owner

Task 5: Download Commerce organizational hierarchy to Teams

1. In Commerce Finance and Operations, go to Retail and Commerce, Channel setup and then Microsoft Teams Integration Configuration.



2. Select Download targeting hierarchy, and then select Retail Stores by Region to download a comma-separated values (CSV) file of the organizational hierarchy.
3. Click in Download to save to a local folder in your computer.



Task 6: Install Microsoft Teams PowerShell module

Requirements

Microsoft Teams PowerShell module requires PowerShell 5.1 or higher on all platforms. Install the [latest version of PowerShell](#) available for your operating system.

1. Check your PowerShell version. To check your PowerShell version, run the following command from within a PowerShell session:
2. `$PSVersionTable.PSVersion`

```
PS C:\Users\ [redacted] $PSVersionTable.PSVersion
Major Minor Patch PreReleaseLabel BuildLabel
-----
7      0      6
```

3. Installing using the PowerShellGallery
4. `Install-Module -Name PowerShellGet -Force -AllowClobber`

```
PowerShell
PS C:\Users\ [redacted] Install-Module -Name PowerShellGet -Force -AllowClobber
```

5. Install the Teams PowerShell Module.
6. **Install-Module -Name MicrosoftTeams -Force -AllowClobber**

```
PowerShell
PS C:\Users\ [redacted] Install-Module -Name MicrosoftTeams -Force -AllowClobber -RequiredVersion 3.2.0
```

Task 7: Upload organization hierarchy to Teams.

1. To start working with Microsoft Teams PowerShell module, sign in with your Azure credentials.
2. **Run** the following command in PowerShell **to authenticate**.
3. Connect-MicrosoftTeams

```
PowerShell
PS C:\Users\anhass> Connect-MicrosoftTeams
```

4. Upload the TargetingHierarchy.csv to Microsoft Teams. You will use Microsoft Teams PowerShell module and cmdlet Set-TeamTargetingHierarchy installed in the previous steps.
5. Set-TeamTargetingHierarchy -FilePath "C:\TargetingHierarchy.csv"

```
PowerShell
PS C:\Users\ [redacted] Set-TeamTargetingHierarchy -FilePath "C:\TargetingHierarchy.csv"
```

6. Run the following command to check the status of your hierarchy upload.
7. Get-TeamTargetingHierarchyStatus
8. The command will return the following fields:

Field	Description
Id	The unique ID for the upload.

Status	Upload status. Values include Starting , Validating , Successful , and Failed
ErrorDetails	Details if there's an upload error. For more information about the error details, see the Troubleshooting section. If there's no error, this field is blank.
LastUpdatedAt	Timestamp and date of when the file was last updated.
LastModifiedBy	The ID of the last user who modified the file.
FileName	The file name of the CSV.

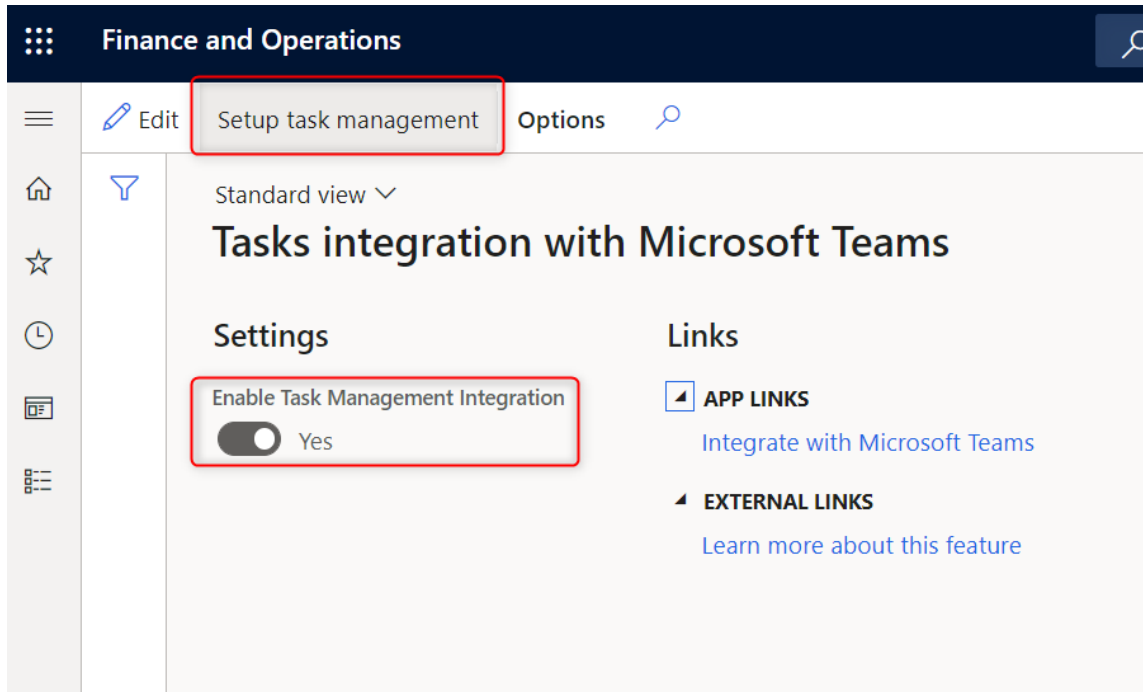
Task 8: Link POS and Teams for task management

1. Go to Retail and Commerce, Task management, and Tasks integration with Microsoft Teams.

The screenshot shows the Dynamics 365 Finance and Operations interface. On the left, the navigation pane is open, and 'Retail and Commerce' is selected. The main area displays a list of options under 'Task management', which is expanded. The option 'Tasks integration with Microsoft Teams' is highlighted.

2. Flip the Enable Task Management Integration to Yes

3. On the Action Pane, select Setup task management. You should receive a notification that indicates that a batch job that is named Teams provision is being created.



4. Provide your credentials if ask for authentication. Click close to continue.

?

Success!

You have successfully completed the authentication process. To continue your work, go back to the previous browser tab.

5. Go to System administration, Inquiries, and then Batch jobs, and find the most recent job that has the description Teams provision. Wait until this job has finished running.
6. Run the CDX job 1070 to publish the plan ID and store references to Retail Server.

The Dynamics 365 Commerce POS application has task management features that let store managers and workers manage tasks and update task status. Store workers can access tasks either by selecting the **Tasks** tile on the POS home page or by selecting task notifications.

By default, store workers are taken to the **My tasks** tab, where they can view the tasks that are assigned to them. However, they can easily switch to the **Overdue tasks**, **Open tasks**, and **Task lists** tabs.

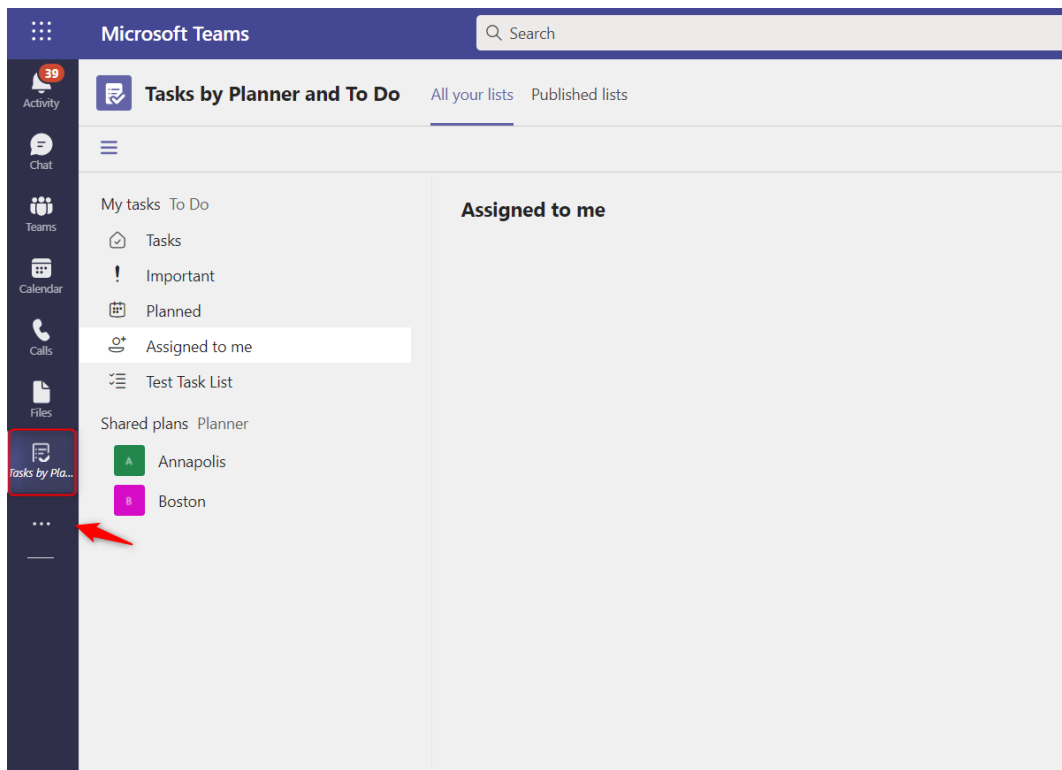
Exercise 3: Task Management in POS

In this exercise, you will play the role of a Retail communications manager who will login into Teams and publish a task "Setup Women's Spring Lineup Display" and then you will play the role of a Store manager who will login into D365 Commerce POS application to view the tasks and assign the new task to a store employee. Finally, you will play the role of a store employee who will view the assigned tasks and marks it as complete once the task is completed.

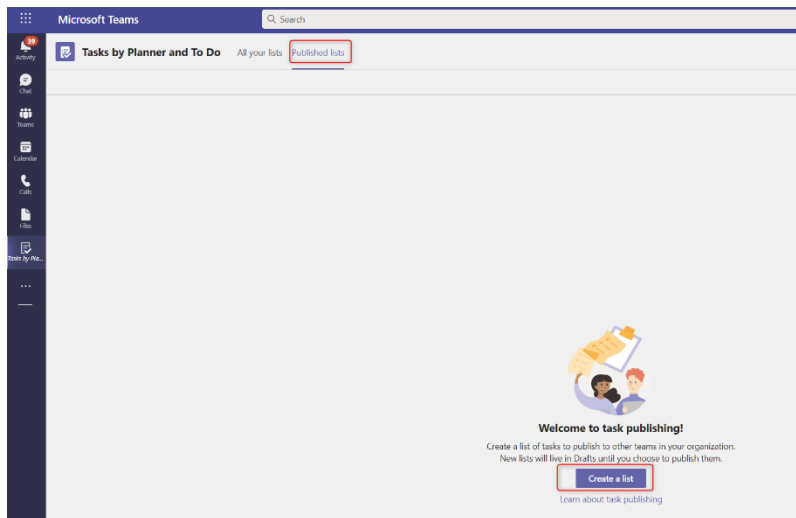
Task 1: Publish a test task list in Teams

In this task, you will login into Teams as a Retail Communications Manager, create a list of tasks and assigns it to all stores in a region.

1. Sign into Teams as a communications manager. Typically, communications managers are users who have the **Regional manager** role in Commerce.
2. In the left navigation pane, select **Tasks by Planner**. If it does not show-up in your Teams click on the three dots located lower in the left navigation pane.



- On the **Published lists** tab, select **Create list** in the lower right.
Important - If there are existing tasks, the Create a List button will be located on the left lower corner.



- Name the new list **Test task list** from **Retail Communication** and Click Create.

New list ×

List name

Test Task List

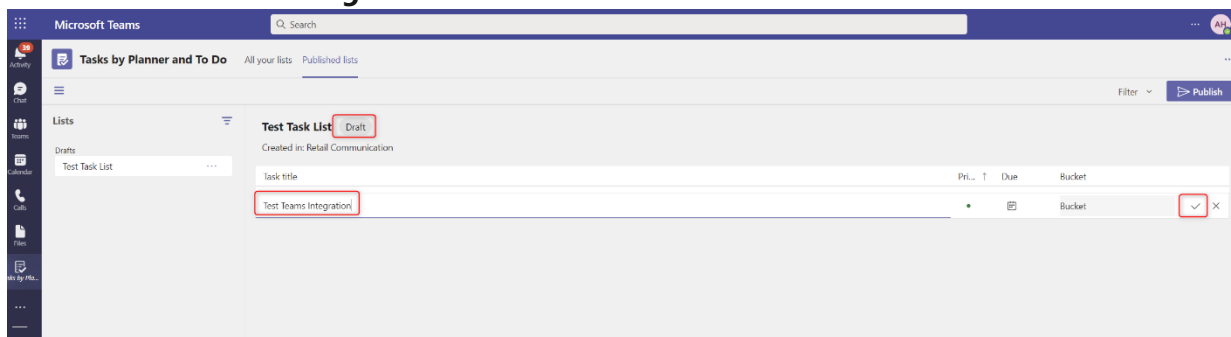
Publish from

Retail Communication

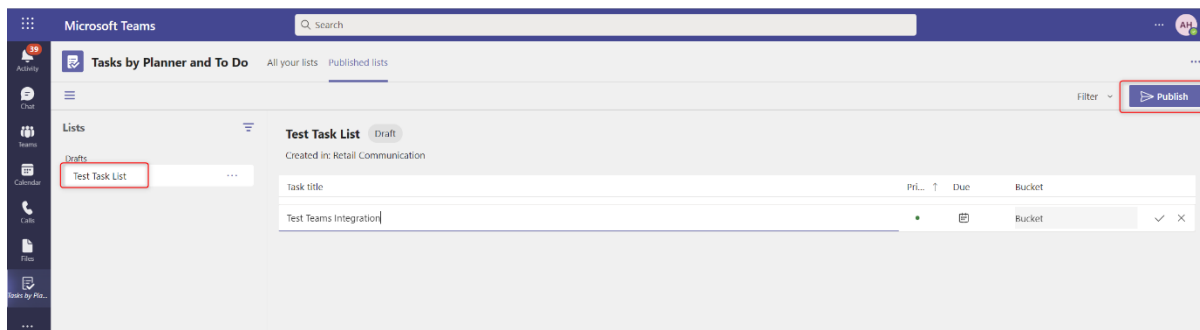
Choose the team who will be publishing the list to its recipient teams.

[< Back](#) [Create](#)

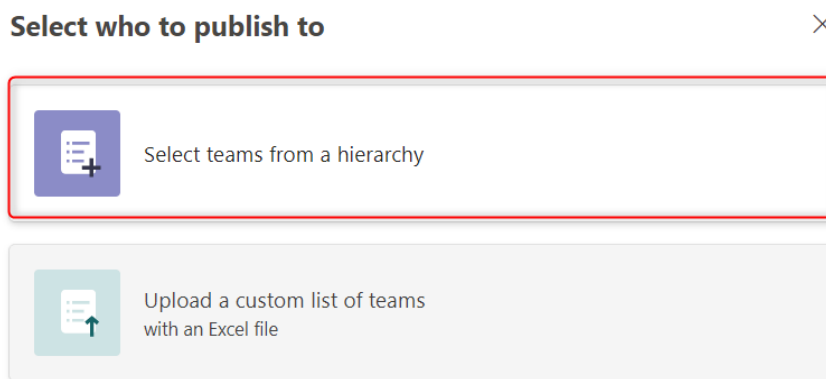
- Under **Task title**, give the first task the title **Testing Teams integration**. Then select **Enter or Click on the check mark on the right**.



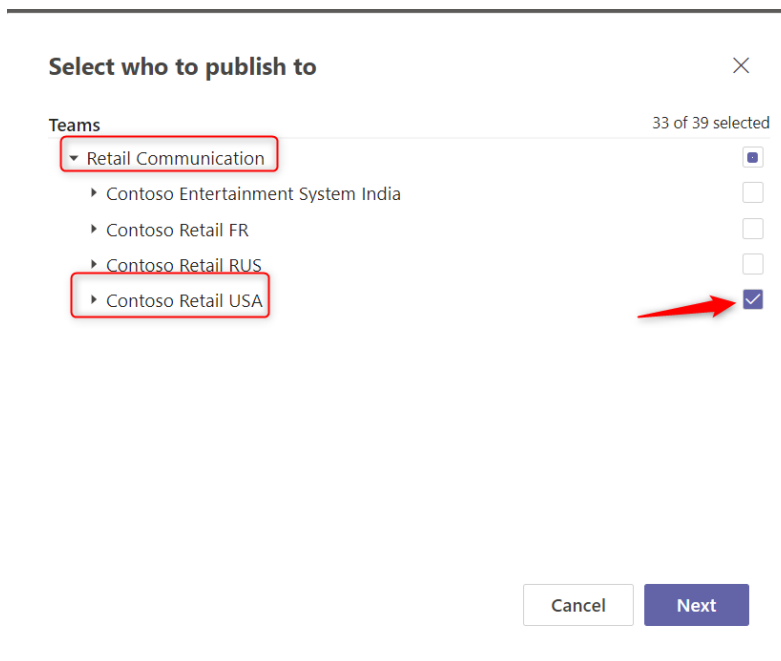
- In the **Drafts** list, select the task list. Then select **Publish** in the upper-right corner.



7. In the **Select who to publish to** dialog box, Click on **Select the teams from hierarchy**.



8. Expand **Retail Communication**, check the **Contoso Retail USA** box on the left side, and then click Next.



9. On Take One last look, notice the Test Task List created in the step below is ready to be published to 33 Teams.
10. Check Ready, everything looks good here, and click Publish.

Take one last look

Retail Communication is about to publish:

Test Task List

1Tasks 33Teams

☒ Ready, everything looks good here

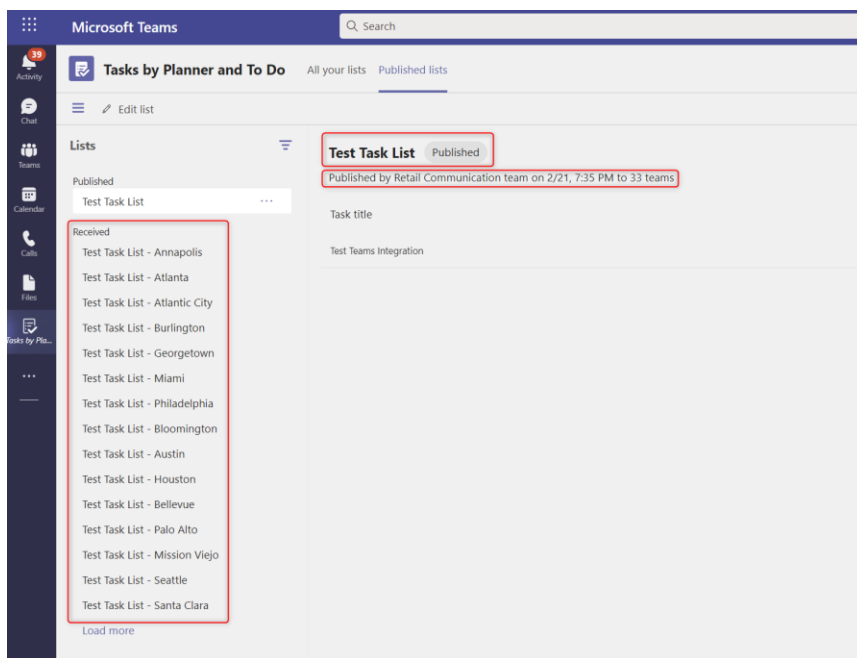
Publishing may take a while, so feel free to continue using Tasks while it finishes.

< Back

Cancel

Publish

11. The Test Task List has been published to all 33 Teams. **It is now** possible to see **under** Received **that** all the Teams for each stores has received the published task.



Congratulations! You have successfully created a list of tasks and assigned to all stores in a region.

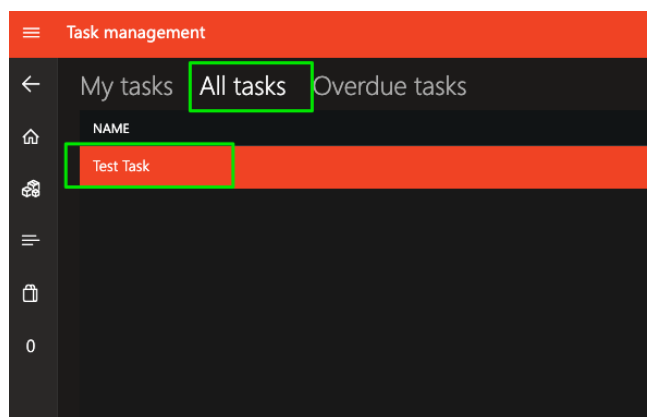
Task 2: View and assign the tasks in D365 Commerce POS

In this task, you will login into D365 Commerce POS store, view unassigned tasks and assign it to the store employees.

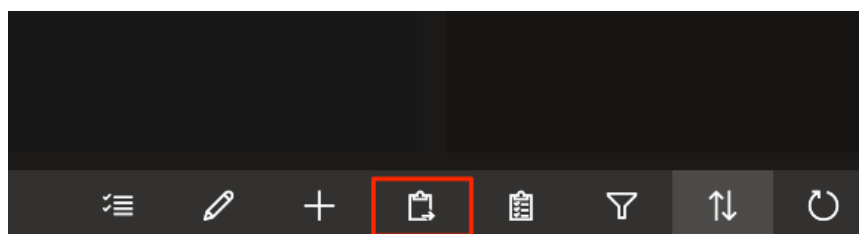
1. Log into Commerce POS and Select a Store to Manage and Assign Tasks.
2. Once logged into Commerce POS Click on Task Management.



3. In **Task Management**, click on **All Tasks**. The Test Task created in Teams completed in previous exercise should show-up in the **All Tasks** list.
4. Select the **Test Task**



5. Click on **Assign a Task** at the right lower corner of the screen.



6. Choose Emma Harris to assign the **Test Task**.

Choose an employee

For task assignment

Scan or search

Ian Palangio
000107

Dan Park
000110

Andrew Lan
000120

Emma Harris
000137

Alexander Eggerer
000160

7. On the Task List **Assigned to** field, confirm the task has been assigned to Emma Harris

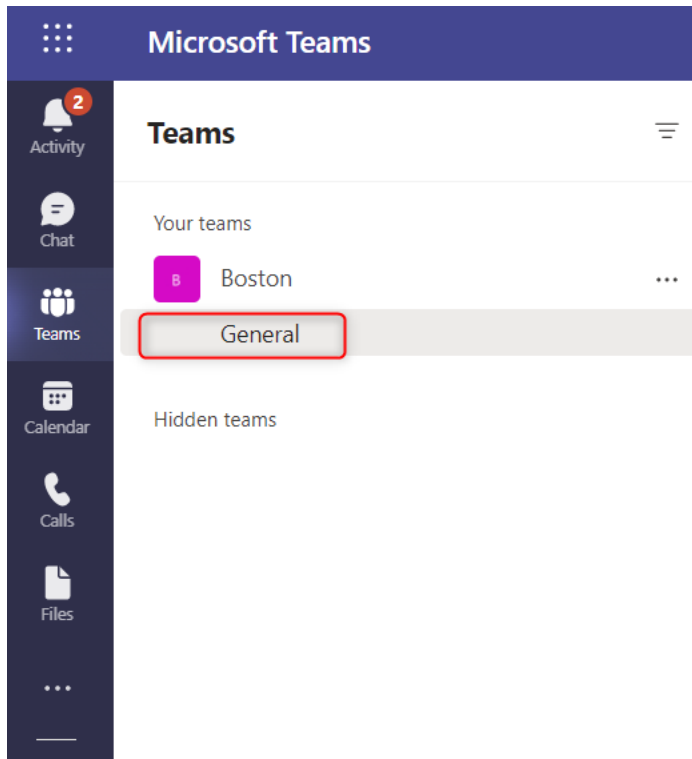
Task management	
My tasks All tasks Overdue tasks	
NAME	ASSIGNED TO
Test Task	Emma Harris

Congratulations! You have successfully viewed the unassigned tasks and assigned them to store employees.

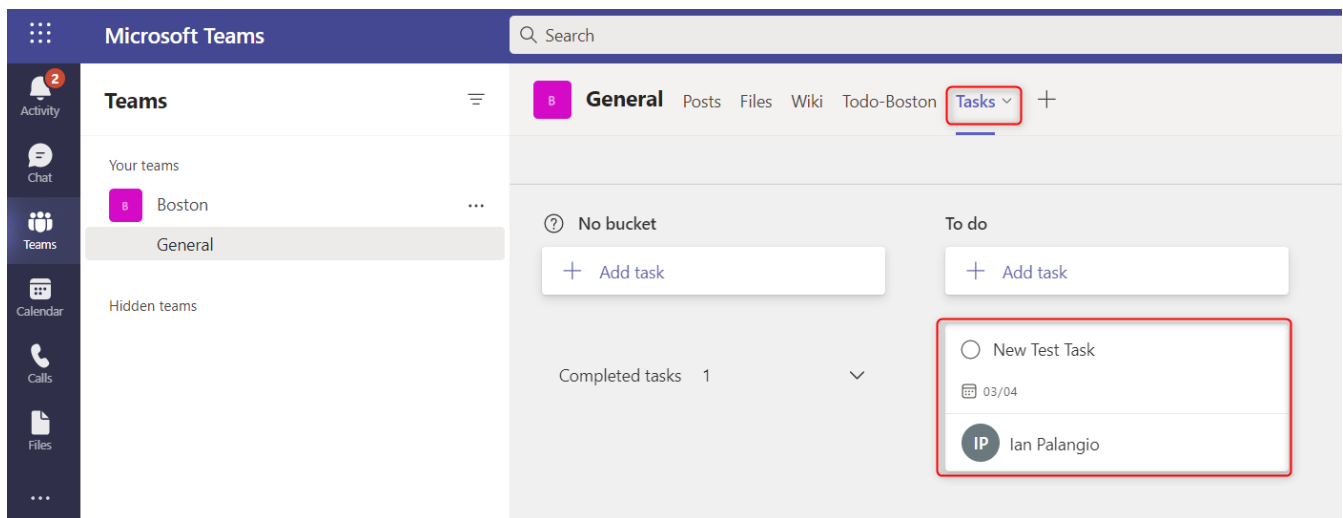
Task 3 - Review assigned Tasks in Teams and mark them as complete

In this task, you will act as employee and review the assigned tasks in Teams and mark them as complete once the assigned task is completed.

1. Log into Teams and navigate to the assigned store



2. View the assigned tasks, click on New Test Task.



3. Mark the New Test Task as complete.

...

×

Tasks

✓

New Test Task

Completed on moments ago by you

IP

Ian Palangio

Add label

Bucket

To do

▼

Progress

✓ Completed

▼

Priority

● Medium

▼

Start date

Start anytime

📅

Due date

03/04/2022

📅

Notes

Type a description or add notes here

Congratulations! You have successfully learned the steps to view the assigned tasks and marked them as complete.