



# 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

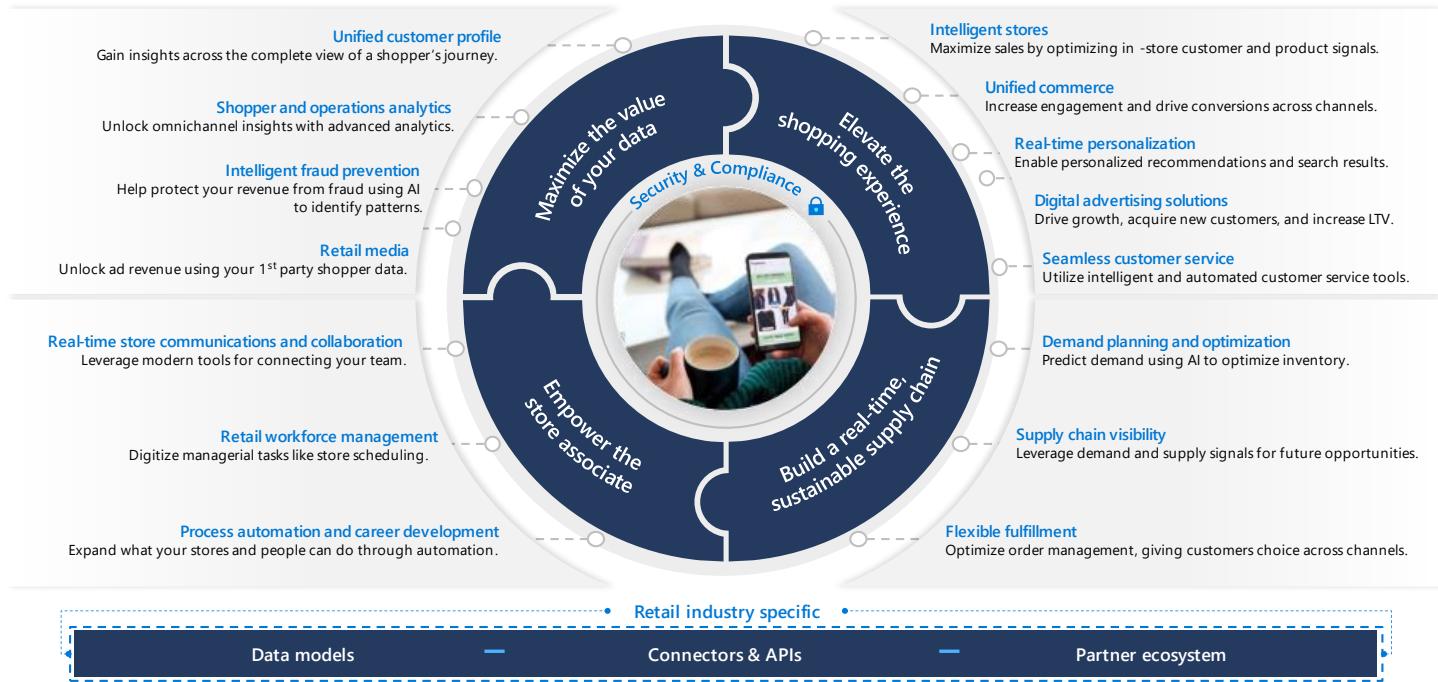
Also, experience **task management made easy**:

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



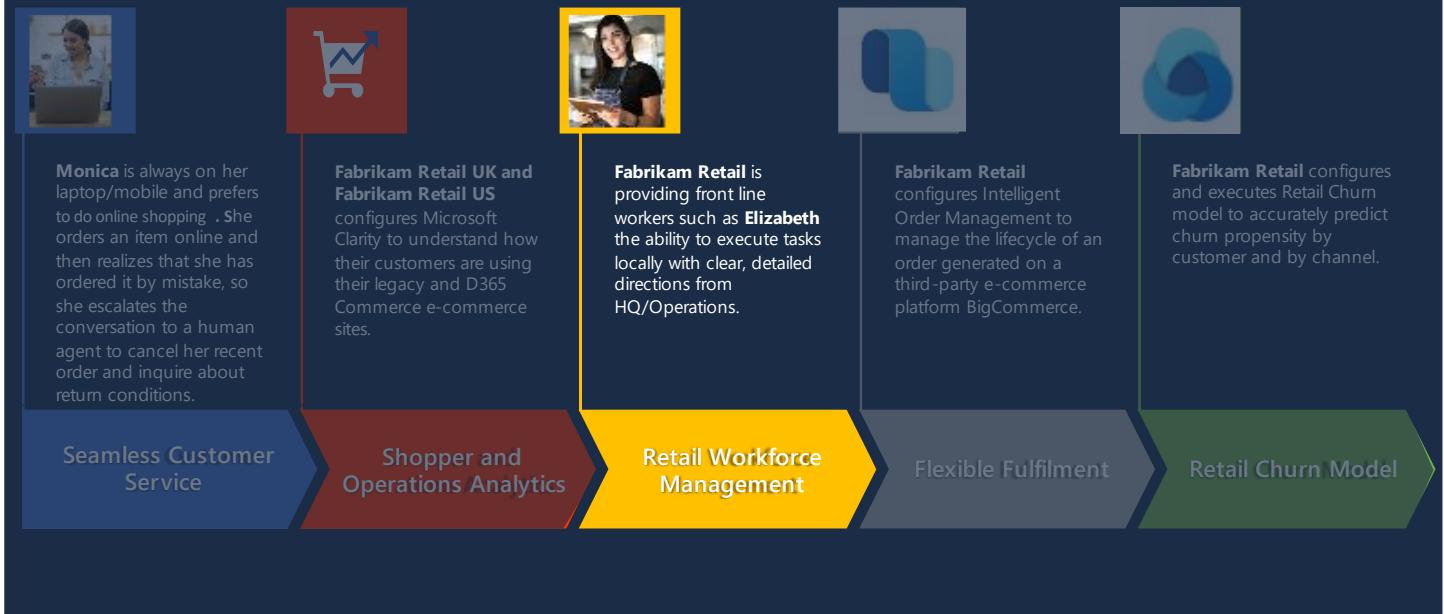
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## Learning Objectives

### 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 Store Employee**:

- In Exercise 1, you will be creating an App registration and setting up the required permissions.
- In Exercise 2, you will be enabling the integration between D365 Commerce and Teams Task management app.
- In Exercise 3 – Task 1, 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.
- 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 mark them as complete once the task is completed.
- And in Exercise 3 – Task 4, you will login back to teams as Retail communications manager to check the progress of the tasks across stores by using a list report

## 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.

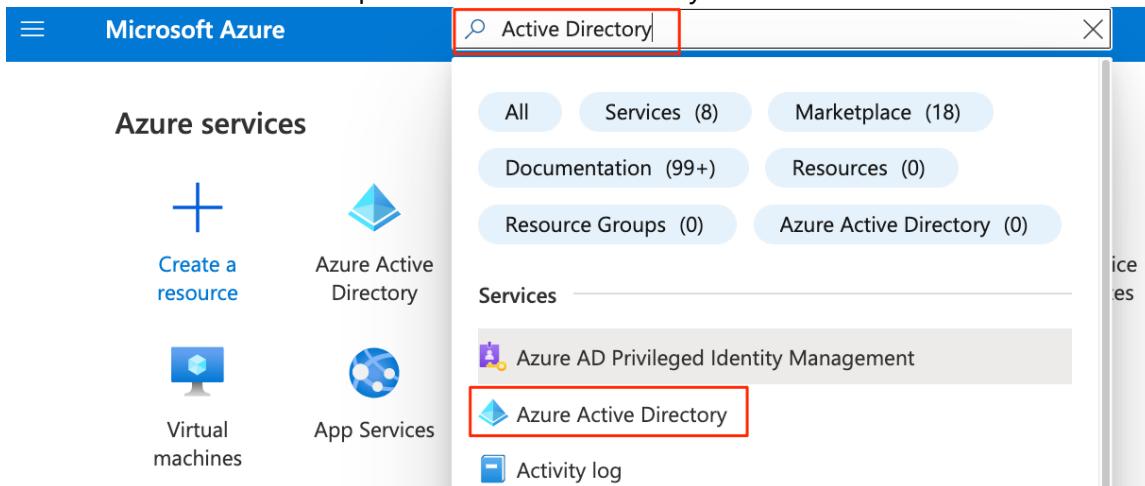
Before you can enable Microsoft Teams integration with Commerce, you must register the Teams application with your tenant in the Azure portal.

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

**Microsoft | Overview**

Overview    Monitoring    Tutorials

Basic information

Name	Microsoft	Users
Tenant ID	[REDACTED]	Groups
Primary domain	PowerPlatformOpenHacks.onmicrosoft.com	Applications
License	Azure AD Free	Devices

Alerts

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

+ New registration

Endpoints    Troubleshooting    Refresh    Download    Preview features

**i** Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and A... support and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Graph. [Learn more](#)

All applications    **Owned applications**    Deleted applications

Start typing a display name to filter these results

Application (client) ID starts with  X

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>

7. Click in Register to complete.

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

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.  
 ✓     ✓

### Important

8. 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+/) 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

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

The Microsoft Azure search bar at the top of the page. It features a magnifying glass icon, the text "Search resources, services, and docs (G+)", and a clear search button.

Home > Microsoft >



## Microsoft Teams Commerce



...

Search (Cmd+/)

Delete Endpoints Preview features

Overview Quickstart Integration assistant

Manage

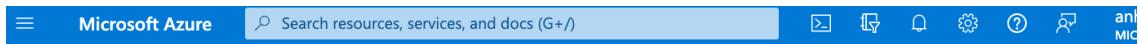
Branding & properties Authentication Certificates & secrets (highlighted with red box)

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

The Microsoft Azure search bar at the top of the page. It features a magnifying glass icon, the text "Search resources, services, and docs (G+)", and a clear search button.

Home > Microsoft > Microsoft Teams Commerce

## Microsoft Teams Commerce | Certificates & secrets

Search (Cmd+/) Got feedback?

Overview Quickstart Integration assistant

Manage

Branding & properties Authentication Certificates & secrets (highlighted with red box)

Token configuration API permissions Expose an API App roles Owners

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens. This is typically used for web applications that do not have a UI or where the application is located (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret).

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 client secret.

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

X

Description

secret

Expires

Recommended: 6 months

▼

### Important

4. Copy the key value generated for the client secret and save it in and 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**.

The screenshot shows the Microsoft Teams Commerce API permissions page. The left sidebar has tabs for Overview, Quickstart, Integration assistant, Manage (with sub-options: Branding & properties, Authentication, Certificates & secrets, Token configuration, and API permissions), and API permissions (which is highlighted with a red box). The main area shows a message about admin consent required. Below it is a 'Configured permissions' section with a note that applications are authorized to call APIs when granted permissions. There is a button to '+ Add a permission' (also highlighted with a red box) and a checked checkbox for 'Grant admin consent for Microsoft Graph'. A table header row is visible below.

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

The screenshot shows the 'Request API permissions' pop-up. It has tabs for Microsoft APIs, APIs my organization uses, and My APIs. The Microsoft APIs tab is selected. Under 'Commonly used Microsoft APIs', the Microsoft Graph option is highlighted with a red box. Other options shown include Azure Communication Services, Azure Data Explorer, and Azure DevOps.

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](#)

Group

X

**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
✓ 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.

## Microsoft Teams Commerce | API permissions

The screenshot shows the Microsoft Teams Commerce API permissions page. On the left, there's a sidebar with links like Overview, Quickstart, Integration assistant, Manage, Branding & properties, Authentication, Certificates & secrets, Token configuration, and API permissions. The 'API permissions' link is highlighted with a red box. The main area shows a table titled 'Configured permissions' with one entry: 'Microsoft Graph (1)'. Below the table, there are buttons for 'Add a permission' and 'Grant admin consent for Microsoft'. A note at the top right says: 'The "Admin consent required" column shows the default value for permission, user, or app. This column may not reflect the value in more'.

- 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

The screenshot shows the 'Request API permissions' pop-up. It has a section for 'Microsoft Graph' with a description: '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.' Below this are sections for 'Azure Communication Services', 'Azure Data Explorer', and 'Azure DevOps'.

- Select **Application permissions**

### Request API permissions

X

[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?

🔗 Overview 🔗 Quickstart 🔗 Integration assistant

🔗 **API permissions**

**Configured permissions**

The "Admin consent required" column shows the default value for permission, user, or app. This column may not reflect the value in the application manifest.

+ 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 X

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

Microsoft Teams Retail Service ←

13. Select **Delegated permissions**

Request API permissions X

[◀ 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 **TaskPublising.ReadWrite.All**, then click **Add permissions** button.

## Select permissions

[expand all](#)

Start typing a permission to filter these results

**Info** 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 ⓘ	Yes
PraiseBadges.ReadWrite.All	
▼ TaskPublishing (1)	
<input type="checkbox"/> TaskPublishing.Read.All ⓘ	Yes
Allow reading of task publications	
<input checked="" type="checkbox"/> TaskPublishing.ReadWrite.All ⓘ	Yes
Allow management of task publications	

## 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
 Microsoft Teams Commerce	6b5feb9-a64b-4420-...	2/14/2022	<input checked="" type="checkbox"/> Current

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

The screenshot shows the Microsoft Teams Commerce | Expose an API page. On the left, there's a sidebar with 'Manage' sections: Branding & properties, Authentication, Certificates & secrets, Token configuration, API permissions, **Expose an API** (which is selected and highlighted with a red box), App roles, and Owners. The main content area has a heading 'Scopes defined by this API'. It includes a note about defining custom scopes to restrict access to data and functionality. Below this, there's a table with columns 'Scopes', 'Who can consent', 'Admin consent disp...', and 'User consent'. A button labeled '+ Add a scope' is highlighted with a red box. The table currently shows 'No scopes have been defined'.

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`.

The screenshot shows the 'Add a scope' page. It starts with a note: 'You'll need to set an Application ID URI before you can add a permission. We've chosen one, but you can change it.' Below this is a form with a red border around the 'Application ID URI \*' field. The field contains the value 'api://6b5feb9-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

X

Scope name \* ⓘ  
Employees.Read.All ✓  
api://6b5feb9-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.

<b>Scope name</b>	Employees.Write.All
<b>Who can consent</b>	Admins only
<b>Admin consent display name</b>	Write access to records
<b>Admin consent description</b>	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://6b5feb9-a64b-4420-9755-e81446f7062a/Emp...	Admins and users	Read-only access to Empl...	Read-only access to your...	Enabled
api://6b5feb9-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.

The screenshot shows the Microsoft Azure portal interface. At the top, there is a blue header bar with the Microsoft Azure logo and a search bar. Below the header, the URL is shown as Home > App registrations > Microsoft Teams Commerce. The main title is "Microsoft Teams Commerce | API permissions". On the left, there is a sidebar with various management options like Overview, Quickstart, Integration assistant, and a section for Manage which includes Branding & properties, Authentication, Certificates & secrets, Token configuration, API permissions (which is highlighted with a red box), Expose an API, App roles, Owners, and Roles and administrators. The main content area is titled "Configured permissions" and contains a note: "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". Below this, there is a button labeled "+ Add a permission" with a checkmark next to it, followed by the text "Grant admin consent for Microsoft". A table lists the configured permissions: "Microsoft Graph (1)" with "User.Read" under API / Permissions name, Type as Delegated, and Description as "Sign in and read user profile".

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 quick start, you should see Employees.Read.All and Employees.Write.All.

**Request API permissions**

[X](#)

[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)	
Employees.Read.All ⓘ Read-only access to Employee records	No
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 [X](#) [Add filters](#)

3 applications found

Display name ↑↓	Application (client) ID	Created on ↑↓	Certificates & secrets
MT Microsoft Teams Commerce	6b5febd9-a64b-4420-9755-e81446f7062a	2/14/2022	<input checked="" type="checkbox"/> Current

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

Microsoft Azure

Search resources, services, and

Home > App registrations > Microsoft Teams Commerce

## Microsoft Teams Commerce | API permissions

Search (Ctrl+ /) Refresh Got feedback? Overview Quickstart Integration assistant

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.

##### 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

X

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

email ×

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

offline\_access ×

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

openid ×

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

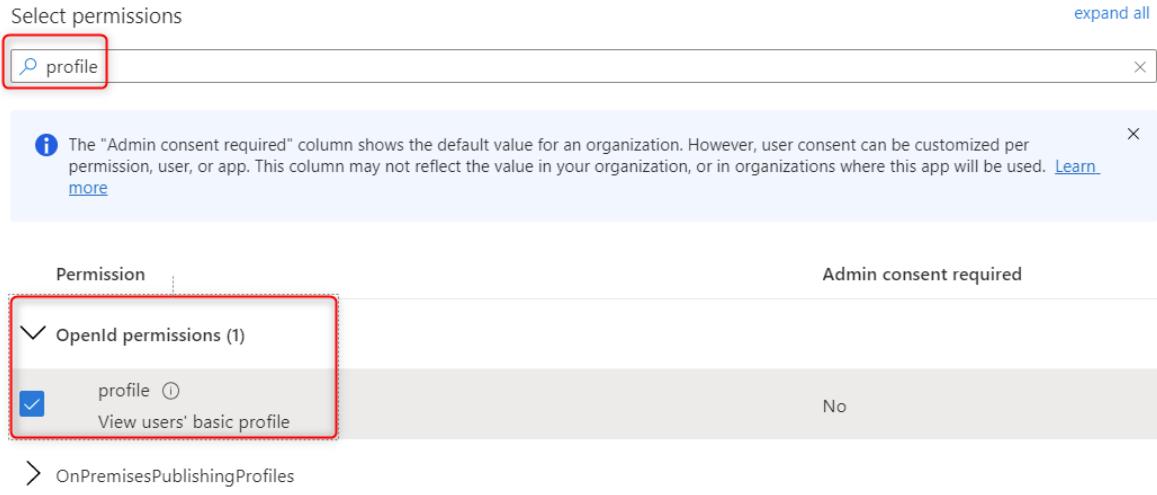
expand all

profile

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) profile View users' basic profile	No

OnPremisesPublishingProfiles



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.

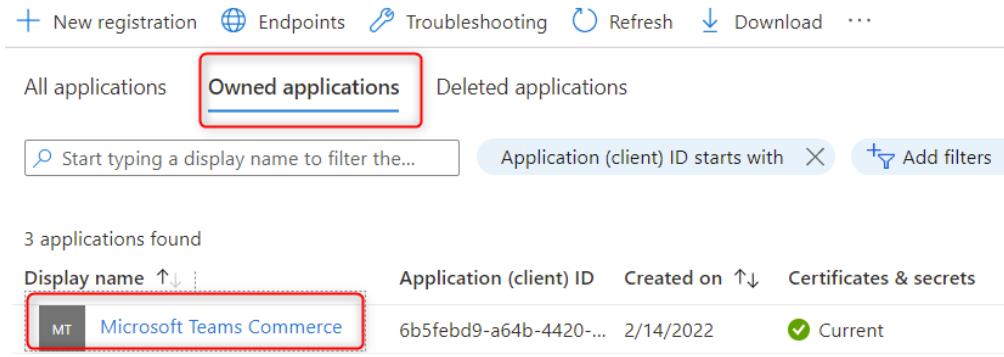
+ New registration    Endpoints    Troubleshooting    Refresh    Download    ...

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	6b5feb9-a64b-4420-...	2/14/2022	Current



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

Microsoft Azure

Search resources, services, and

Home > App registrations > Microsoft Teams Commerce

## Microsoft Teams Commerce | API permissions

Search (Ctrl+ /) Refresh Got feedback?

Overview Quickstart Integration assistant

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](#).

Manage

- Branding & properties
- Authentication
- Certificates & secrets
- Token configuration
- API permissions**
- Expose an API
- App roles
- Owners
- Roles and administrators | Preview

#### 4. Choose Microsoft Graph.

#### 5. Under Request API permissions Select Application Permissions

### Request API permissions

X

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 users' roles for each of the personas -Retail communication manager, store manager and store employee

1. To perform this task, you would need an administrator access to the tenant to create users.
2. Login to <https://admin.microsoft.com> and create users in the tenant you are using
3. Create a user by clicking add user who will act as Retail communication manager

The screenshot shows the Microsoft 365 Admin Center homepage. The left sidebar is titled "Microsoft 365 admin center" and includes links for Home, Users, Active users, Contacts, Guest users, Deleted users, Teams & groups, and Billing. The main content area has a title "Support remote workers with Teams" and a sub-section "User management". It says "Add, edit, and remove user accounts, and reset passwords." Below this are three status items: "Teams is on for your organization" (green checkmark), "Check setup status for new Teams users" (blue info icon), and "Guest access is on" (green checkmark). At the bottom right are "Add user" and "Edit a user" buttons.

4. Create the user and assign licenses

Add a user

The screenshot shows the "Set up the basics" step of the "Add a user" wizard. On the left, a vertical navigation bar shows steps: Basics (selected, blue circle), Product licenses (checked, blue circle), Optional settings (unchecked, grey circle), and Finish (unchecked, grey circle). The main form fields include:

- First name: Michael
- Last name: Ellen
- Display name \*: Michael Ellen
- Username \*: michaelellen (highlighted with a red underline)
- Domains: PowerPlatformOpenHacks.onmicrosoft.com (dropdown menu)

A "Next" button is at the bottom right.

5. As the Retail communication manager will be publishing tasks for store employees using Microsoft Teams, Office 365 E5 license is assigned.

- 9999 of 10000 licenses available
- Microsoft Power Apps Plan 2 Trial**  
9870 of 10000 licenses available
- Microsoft Power Automate Free**  
9707 of 10000 licenses available
- Microsoft Teams Exploratory**  
98 of 100 licenses available
- Office 365 E5**  
190 of 500 licenses available
- Power BI (free)**  
Unlimited licenses available
- Power Virtual Agents Viral Trial**  
9886 of 10000 licenses available

6. We would set the user profile as Retail communication manager, so that the title appears in Teams

#### Add a user

The screenshot shows the 'Add a user' wizard with the following steps:

- Basics (checked)
- Product licenses (checked)
- Optional settings** (checked)
- Finish (unchecked)

On the right, under 'Profile info':

Job title: Retail communications manager

Department: Fabrikam retail

7. Next step would be to be to create a user who will act as store manager to login to POS and assign tasks to store employees

#### Add a user

To get started, fill out some basic information about who you're adding as a user.

**Basics**

Product licenses  
Optional settings  
Finish

First name: Chris  
Last name: Gallagher  
Display name: Chris Gallagher  
Username: chrisg  
Domains: PowerPlatformOpenHacks.onmicrosoft.com

#### 8. Assign Dynamics 365 Commerce license as the store manager will login to POS

Add a user

**Licenses (1)\***

Assign user a product license

**Dynamics 365 Business Central for IWs**  
9892 of 10000 licenses available

**Dynamics 365 Commerce**  
5 of 120 licenses available

**Dynamics 365 Customer Engagement Plan**  
144 of 500 licenses available

**Dynamics 365 Customer Insights Viral**  
9989 of 10000 licenses available

**Dynamics 365 Customer Service Digital Messaging add-on**  
278 of 500 licenses available

**Dynamics 365 Customer Service Enterprise Viral Trial**  
9997 of 10000 licenses available

**Dynamics 365 Customer Voice Trial**  
Unlimited licenses available

[Back](#) [Next](#)

#### 9. Set the user profile as Store manager

Add a user

**Profile info**

**Job title**: Store manager

**Department**: Fabrikam Retail

**Optional settings**

Basics  
Product licenses  
Optional settings  
Finish

#### 10. In the same way a user is created for a Store employee and assigned with licenses

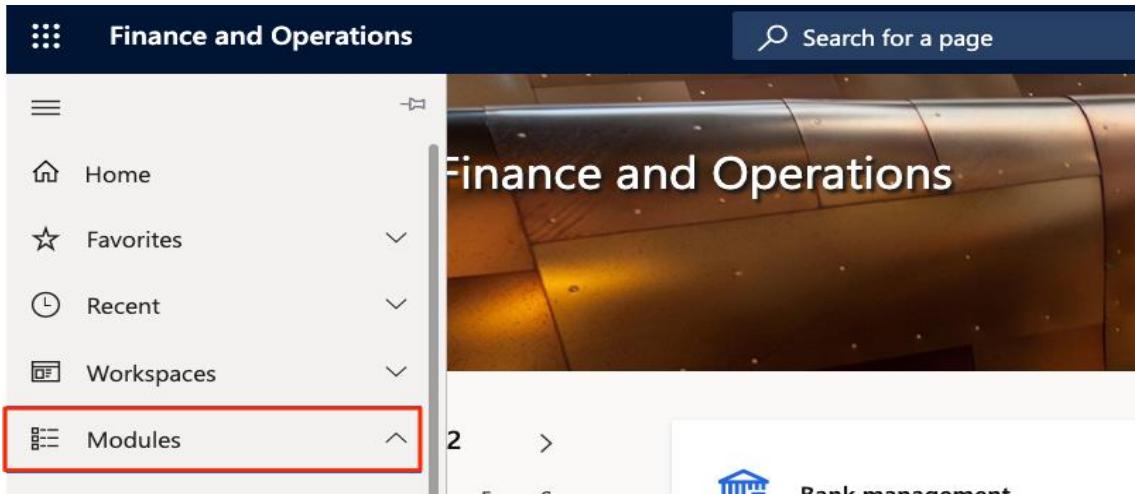
Display name ↑      Username      Licenses

Emma Harris      emmah@powerplatformopenhacks.onmicrosoft.com      Dynamics 365 Customer Engagement Plan,

11. The store employee is assigned Dynamics 365 Commerce and Office 365 E5 license so that he can login to Microsoft Teams and mark his tasks as completed

**Task 2: 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.

Finance and Operations

Search for a page

- 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

Expand all Collapse all

- > Products and categories > Inven
- > Catalogs and assortments > Distri
- > Product recommendations > Conti
- > Pricing and discounts > Retail
- > Channels > Inqui
- Channel deployment > Task r
- Store management > Chani
- Store financials > Chan
- Online stores > Fulfill
- Stores > Info c
- All stores > Chan
- Statements > attrib
- > Gift cards > Store
- Credit memos > Store
- > Call centers > Proce

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 Page options Share

Always open for editing Personalize this page Record info Get a link Create a custom alert

Security diagnostics Advanced filter or sort Go to Manage my alerts

Stores

Standard view

Filter

Retail Channel Id	Name	Channel type	Operating unit numbe
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.

The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The top navigation bar includes 'Finance and Operations' and a search bar. Below the navigation bar, there's a toolbar with 'Edit', 'New', 'Delete', 'Configuration status', 'Store', 'Set up' (which is highlighted with a red box), 'Options', and a magnifying glass icon. On the left, there's a sidebar with icons for Home, Favorites, Clock, and Lists. The main content area is titled 'Stores | Standard view' and shows 'ANAPOL: Annapolis'. Under the 'General' section, there are three columns: 'IDENTIFICATION' (Retail Channel Id: 000001, Name: Annapolis, Store number: ANNAPOL, Operating unit number: ---), 'POS REGISTER' (Functionality profile: FN001, Inventory lookup: No), and 'SALES TAX' (Tax identification number (TIN), Sales tax group: MD, Prices include sales tax: No, Use destination-based tax: ---). A 'PROFILES' section below shows 'Channel profile: Default'.

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

The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The top navigation bar includes 'Finance and Operations' and a search bar. Below the navigation bar, there's a toolbar with 'Edit', 'New', 'Delete', 'As of date', 'Worker' (which is highlighted with a red box), 'Payroll', 'Time', 'Commerce', 'General', 'Options', and a magnifying glass icon. On the left, there's a sidebar with icons for Home, Favorites, Clock, and Lists. The main content area is titled 'Employees | ANNAPOL : ANNAPOLIS' and shows 'Standard view'. It includes sections for 'Personnel actions' (Change position, Terminate, Change worker employment type), 'Position assignment' (Worker position assignments, Add assignment, Edit assignment), 'Versions' (Changes timeline, Employment history, Name History), and 'Personal information' (Accommodations, Bank accounts, Bank account disbursements, Identification numbers, Injury or illness incidents, Labor unions, Loan, Persc, Bene). Below these sections is a table with columns: Name, Search name, Personnel number, Phone, Extension, Email address, and Worker type. The table lists three employees: Chris Gallagher (selected and highlighted with a red box), Emma Harris, and Renata Krausova. All three employees are listed as 'Employee' type.

- 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**.

The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The top navigation bar includes 'Edit', '+ New', 'Delete', 'As of date', 'Worker', 'Payroll', 'Time', 'Commerce' (which is highlighted with a red box), 'General', and 'Options'. Below the navigation bar is a sidebar with icons for Home, POS permissions, Media, View, External identity, and a search bar. The main content area displays 'Employees | ANNEAPOLIS : ANNAPOLIS' under 'Standard view'. A table lists employees: Chris Gallagher (selected), Emma Harris, and Renata Krausova. The table columns are Name, Search name, Personnel number, and Phone.

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
Chris	cgallagher	cgallagher@powerplatformmope...	*****

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 3: Assign store manager to the Retail Task Manager Role

1. Navigate to Retail and Commerce>Employees>Users

Finance and Operations

The screenshot shows the Microsoft Dynamics 365 Finance and Operations ribbon. The 'Retail and Commerce' section is currently selected. Under the 'Employees' category, the 'Users' option is highlighted with a red box.

- 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

- > Products and categories
- > Catalogs and assortments
- > Product recommendations
- > Pricing and discounts
- > Channels
- < Employees
  - Workers
  - Users**
  - Jobs
  - Positions
  - Permission groups
  - > Time and attendance
  - Employee images

2. Select the User ID of Store Manager.

The screenshot shows the 'Users' screen in 'Standard view'. A user named 'chrisg' is selected, and their details are shown in the right pane.

User ID	User name	Email	Company	Person
CHRIS	CHRIS	CHRIS@contosoax7.onmicrosoft.com	USMF	
<b>chrisg</b>	Chris Gallagher	chrisg@powerplatformopenhacks.onmicrosoft.com	<b>usrt</b>	Chris Gallagher

3. Select +Assign Roles.

The screenshot shows the 'User details' page for the user 'chrisg'. In the 'User's roles' section, there is a button labeled '+ Assign roles'.

User details

User ID <b>chrisg</b>	Provider <a href="https://sts.windows.net/">https://sts.windows.net/</a>
User name Chris Gallagher	Email chrisg@powerplatformop...

User's roles

+ Assign roles   Remove role   Assign organizations

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

**OK**   **Cancel**

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

#### Task 4: Customize POS screen layout to add Task management

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, the Task management button is not available in the POS screen layout and hence in this task you will be adding the Task management action to POS screen layout. After adding this button, the 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.

1. Navigate Dynamics Finance and operations URL and go to Retail and Commerce Module from the navigation pane. Go to **Channel setup > POS setup > POS** and go to Screen layouts

The screenshot shows the 'POS setup' section of the 'Screen layouts' page. On the left, there's a sidebar with 'Channel profiles' selected. The main area lists various screen layout options under 'POS'. Several items are highlighted with red boxes: 'POS' under 'POS', 'Screen layouts' under 'POS', 'Registers', 'Devices', 'Channel reports configuration', and 'Register offline status' under 'Registers'; and 'POS profiles', 'Offline profiles', 'Functionality profile', 'Receipt profiles', and 'Hardware profiles' under 'POS profiles'.

- Expand all  Collapse all
- > Inventory management
- > Distributed order management
- > Continuity
- > Retail and Commerce IT
- > Inquiries and reports
- > Task management
- < Channel setup
  - Channel profiles**
  - Fulfillment groups
  - Info codes
  - Info code groups
  - Channel categories and product attributes
- < POS setup
  - POS**
  - Screen layouts**
  - Store pickup time slot
  - Store hours
  - Process pickup time slot availability
  - > Sales taxes
  - > Charges
  - > Payment methods
  - > Fiscal integration
  - Registers
  - Devices
  - Channel reports configuration
  - Register offline status
- < POS profiles
  - POS profiles
  - Offline profiles
  - Functionality profile
  - Receipt profiles
  - Hardware profiles

2. On Screen layout, you choose to design any screen layout and then assign it to the worker associated with your user. In this example we will choose "C3CSH" by searching for name "Contoso cashier" in the filter. Once filtered, use designer to customize the button grids. In this example, "Welcome screen1" is chosen and click on Designer

The screenshot shows the 'Screen layouts' and 'Button grids' sections. In the 'Screen layouts' section, a search bar contains 'Contoso Cashier'. Below it, a list of layouts includes 'C3.1CSH' (selected) and '1024x768 - Full' (highlighted). In the 'Button grids' section, a table lists 'Layout zone', 'Button grid ID', and 'Name'. The first row is 'Layout zone' (selected), and the second row is 'Welcome screen 1' (highlighted).

Name	Layout type
1024x768 - Full	Modern POS - Full
1366x768 - Full	Modern POS - Full
1440x960 - Full	Modern POS - Full

Layout zone	Button grid ID	Name
Welcome screen 1	C2W1C	Start

3. Once you click the designer, a pop-screen will appear asking you to sign in to access the designer. Sign in with your account that used for this training

Sign in to your account



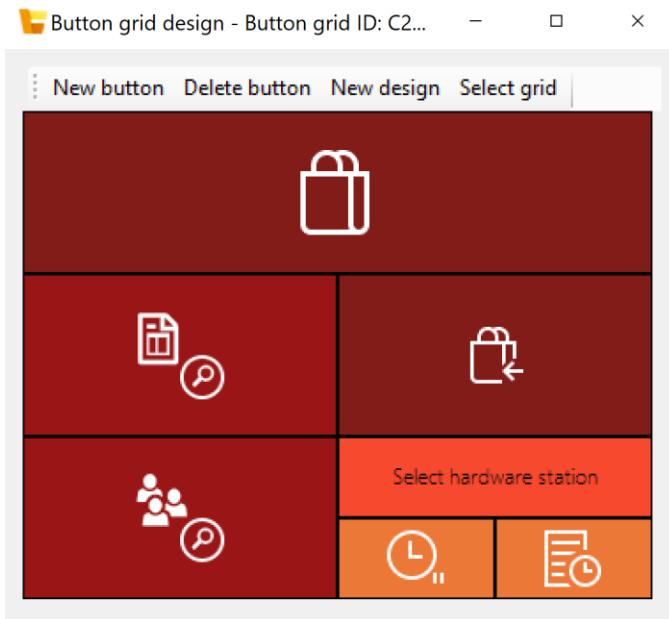
## Sign in

mcr [REDACTED] onmicrosoft.com X

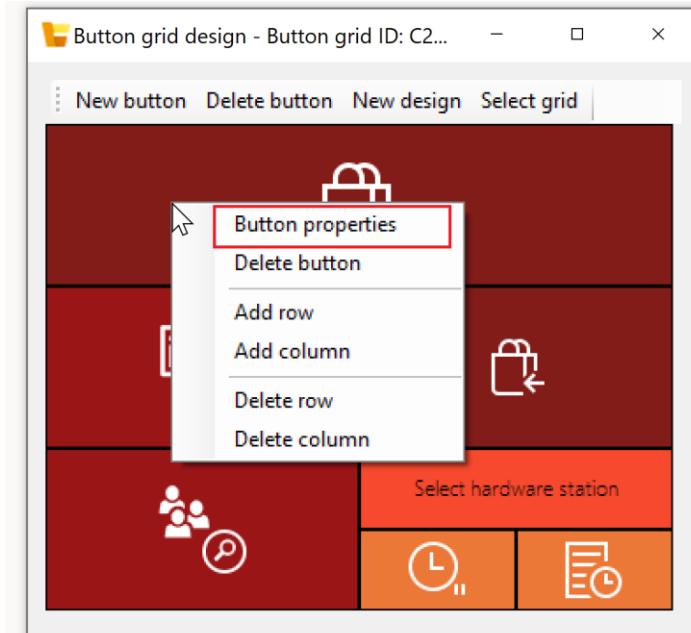
[Can't access your account?](#)

[Next](#)

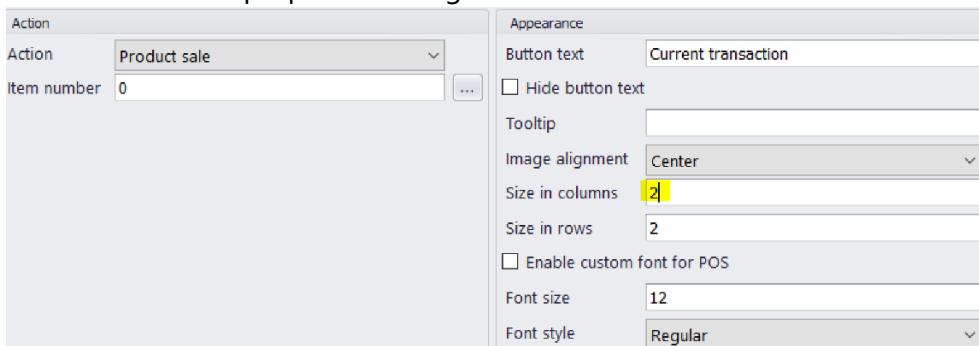
4. The designer will show the screen layout editor as below



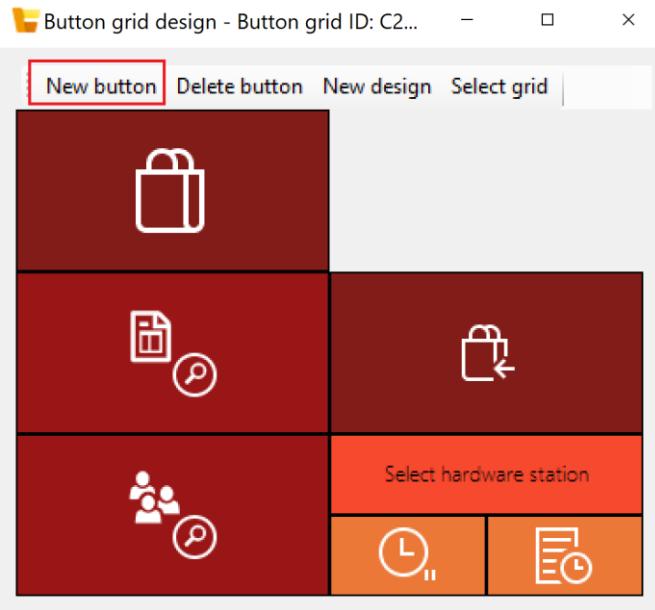
5. As part of this task we will add a button for "task management" next to the "current transaction" button. Right click on first button with shopping bag icon and click button properties



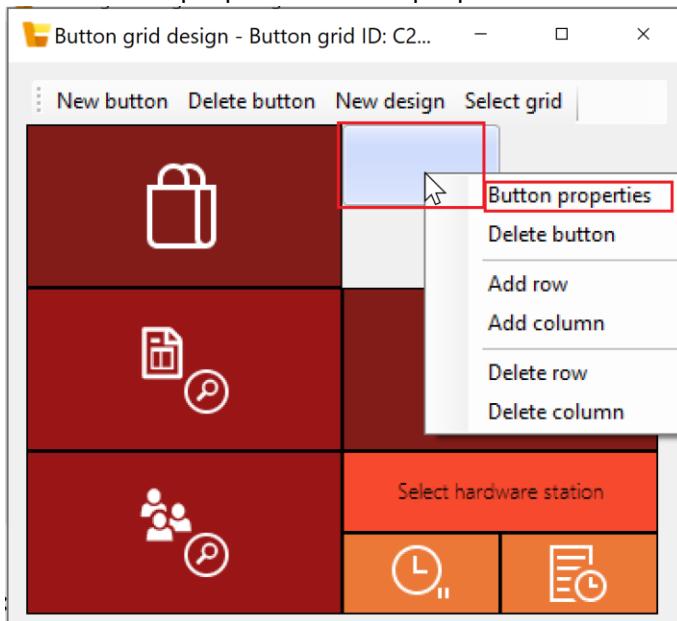
6. In the button properties change the "Size in columns" from 4 to 2 as below and save



7. The screen layout will appear as below. Now add a "New button" beside the "current transaction" button



8. Click "Button properties" to set properties for the new button



9. Click "Button properties" to set properties for the new button

**Action** : Task management

**Button text**: Task management

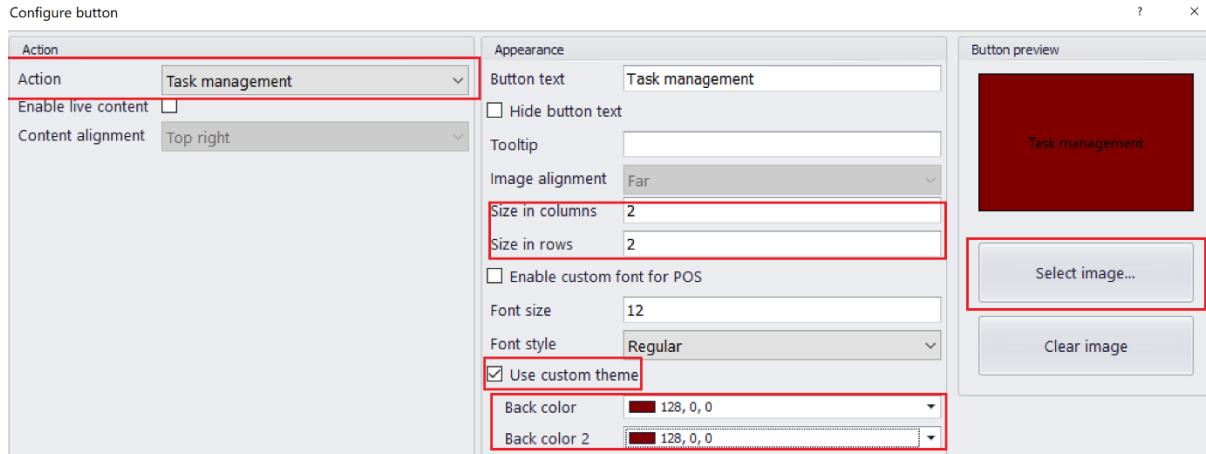
**Size in columns**:2

**Size in rows**:2

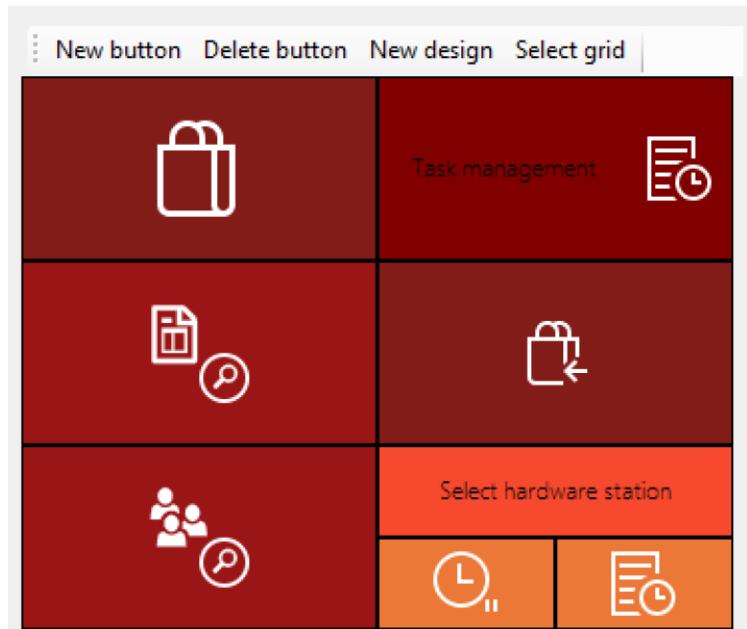
**Use custom theme**: Check

**Back colors**: Choose an appropriate color matching the screen layout

**Select image**: Choose an image suitable for task management



10. Once you click on the screen layout is updated as below with the new Task management button



11. To publish the screen layout changes, navigate to Retail module > Retail and Commerce IT and run Distribution schedule

Expand all  Collapse all

---

- > Products and categories
- > Catalogs and assortments
- > Product recommendations
- > Pricing and discounts
- > Channels
- > Employees
- > Customers
- > Inventory management
- > Distributed order management
- > Continuity
- > Retail and Commerce IT

 Retail and Commerce IT

Distribution schedule

> Products and inventory

Process delivery modes

Synchronize orders

> Email and notifications

POS redeployment

Sales item statistics

RFM analysis

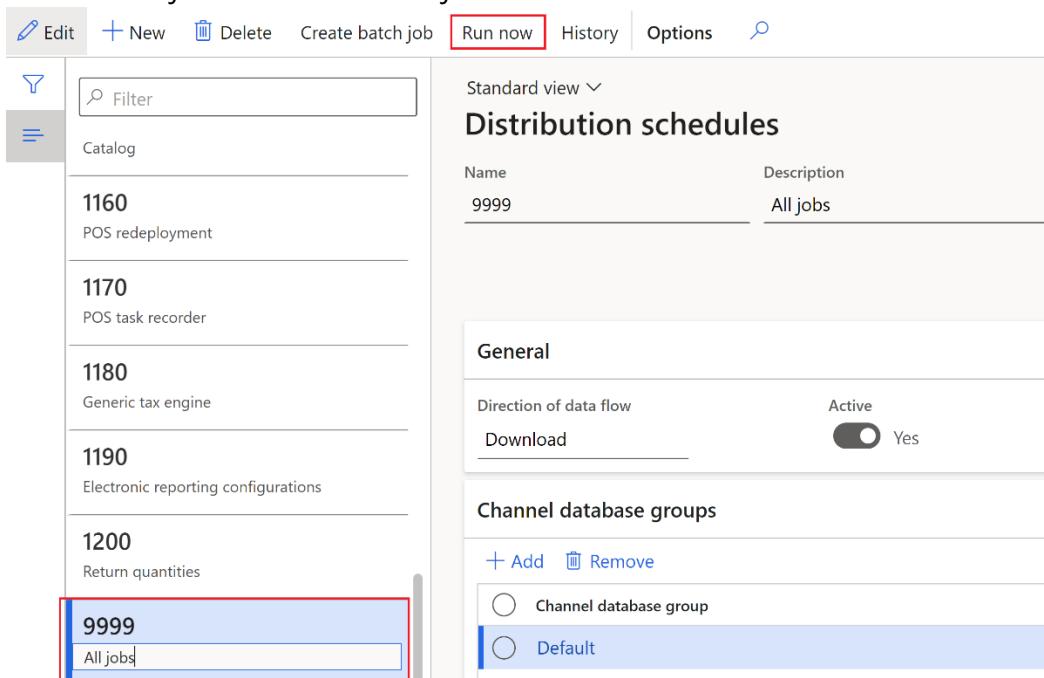
> Clean up

> Installment

> Customer

> Payments

12. Choose " All jobs" from the list of jobs and click "run now"



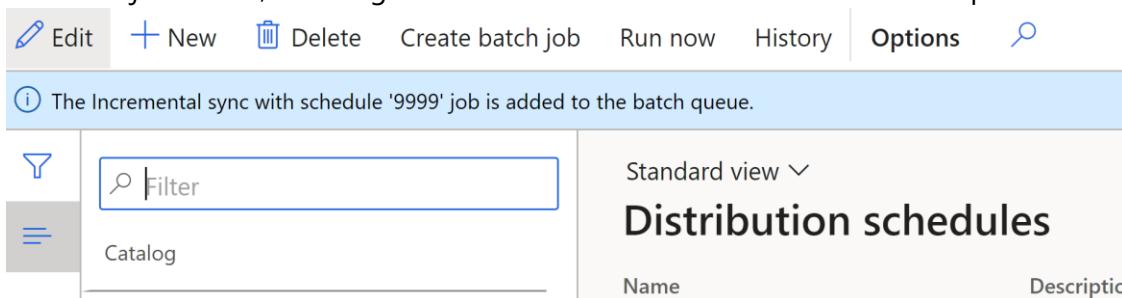
The screenshot shows the 'Distribution schedules' page. At the top, there is a toolbar with buttons for Edit, New, Delete, Create batch job, Run now (which is highlighted with a red box), History, Options, and a search icon.

The main area is titled 'Standard view ▾ Distribution schedules'. It lists several distribution schedules:

- 1160 POS redeployment
- 1170 POS task recorder
- 1180 Generic tax engine
- 1190 Electronic reporting configurations
- 1200 Return quantities
- 9999 All jobs (this item is highlighted with a red box)

Below the list, there are sections for 'General' and 'Channel database groups'. The 'General' section includes fields for 'Direction of data flow' (set to 'Download') and 'Active' status (set to 'Yes'). The 'Channel database groups' section shows two options: 'Channel database group' and 'Default' (which is selected).

13. Once the job is run ,a message is shown below as it is added to the batch queue



The screenshot shows the 'Distribution schedules' page again. A message at the top states: '(i) The Incremental sync with schedule '9999' job is added to the batch queue.'

The main area is titled 'Standard view ▾ Distribution schedules'. It lists the same distribution schedules as before, with the '9999 All jobs' entry still highlighted.

14. Once the job is run , you can click the history button to check the status of the job

+

New Delete Rerun Download file Options

Filter

31117

**1115**  
No data  
4/5/2022 1:55:45 PM  
31122

**1040**  
No data  
4/5/2022 1:55:44 PM  
31114

**1090**  
Available  
4/5/2022 1:55:44 PM  
31119

9999 : ALL JOBS | Standard view

## Download history

Job name	Date and time modified
1090	4/5/2022 01:55:44 PM

### Data read

Channel database group	Rows affected
Default	9
Session number	Row version
31119	2703
Status	Date and time created
Available	4/5/2022 01:55:38 PM

Download session per channel database

15. Ensure the screen layout is assigned to the worker, associated to your user. Navigate to Retail Module>Workers form

Retail and Commerce

- Revenue recognition
- Sales and marketing
- Service management
- System administration

Employees

**Workers**

Users

Jobs

All positions

Permission groups

16. Assign the screen layout to the worker as below , in the commerce tab

Workers | Standard view

**Chris Gallagher : 000205**

Profile Employment Compensation Competencies and development **Commerce**

Default group

User needs to change the password ...  No

Screen layout

Screen layout ID **C3CSH**

## Task 5: Provision Teams in Commerce Finance and Operations

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

The screenshot shows the Dynamics 365 Finance and Operations ribbon navigation bar. The main menu bar at the top has 'Finance and Operations' on the left and a search bar on the right. Below the main menu, there's a secondary navigation bar with 'Expand all' and 'Collapse all' buttons. The left sidebar lists various modules: Cost accounting, Cost management, 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, and Retail and Commerce. The 'Retail and Commerce' module is selected and highlighted with a blue bar at the bottom. The main content area shows a hierarchical list of sub-modules under 'Retail and Commerce'. The 'Channel setup' node is expanded, showing 'Channel profiles', 'Fulfillment groups', 'Info codes', and 'Info code groups'. The 'Microsoft Teams Integration Configuration' node is also expanded and highlighted with a red box. Other visible nodes include 'Products and categories', 'Catalogs and assortments', 'Product recommendations', 'Pricing and discounts', 'Channels', 'Employees', 'Customers', 'Inventory management', 'Distributed order management', 'Continuity', 'Retail and Commerce IT', 'Inquiries and reports', 'Task management', 'Devices', 'Channel reports configuration', 'Register offline status', 'POS', 'POS profiles', 'Call center setup', 'Online store setup', 'Returns', 'Headquarters setup', and 'Order management'. The 'Channel setup' and 'Microsoft Teams Integration Configuration' nodes are specifically highlighted with red boxes.

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**

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-2ea119b8efb8

Application key:

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

**Finance and Operations**

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
    - 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 co
- Deploy Power BI
- Configure perf
- System param
- Client perform
- Personalization
- Office app par
- Configure cros
- Azure Active D
- Key Vault param
- Certificate prof
- Throttling priori
- B2B Invitation
- Custom fields
- Alert rules
- Refresh elemen
- 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   Page options   Share

Always open for editing   Security diagnostics   Record info   Get a link   Create a custom alert   Manage my alerts

Personalize this page   Advanced filter or sort   Go to

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 6: 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.

The screenshot shows the Microsoft Teams admin center interface. On the left, there's a navigation pane with options like Home, Teams (which is selected and highlighted with a red box), 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, and Policy packages. The main area is titled "Manage teams" and contains a "Users summary" section with counts for Total users (486), Internal users (484), and Guests (2). Below this is a table titled "Name" with columns for Standard channels, Private channels, and Privacy. A red box highlights the first five rows of the table, which list teams named Atlanta, Atlantic City, Annapolis, Boston, and Cambridge. The last row, Burlington, is partially visible at the bottom.

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.

The screenshot shows the "Members" tab in the team settings. At the top, there are buttons for "+ Add" and "Remove" with a count of "5 items". The table below lists members with columns for Display name, Username, Title, Location, and Role. A red box highlights the first three rows of the table, which list members named Chris Gallagher, Emma Harris, and Renata Krausova. The last two rows are partially visible at the bottom.

Display name	Username	Title	Location	Role
Chris Gallagher	-	-	-	Owner
Emma Harris	emmah@powerplatformmo...	-	-	Owner
Renata Krausova	renatak@powerplatformmo...	-	-	Owner

## Task 7: 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.

Finance and Operations

Search for a page

≡ +

Cost accounting

Cost management

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

Expand all

Collapse all

Products and categories

Catalogs and assortments

Product recommendations

Pricing and discounts

Channels

Employees

Customers

Inventory management

Distributed order management

Continuity

Retail and Commerce IT

Inquiries and reports

Task management

Channel setup

Channel profiles

Fulfillment groups

Info codes

Info code groups

Channel categories and product attributes

Devices

Channel reports configuration

Register offline status

POS

POS profiles

Call center setup

Online store setup

Returns

Microsoft Teams Integration Configuration

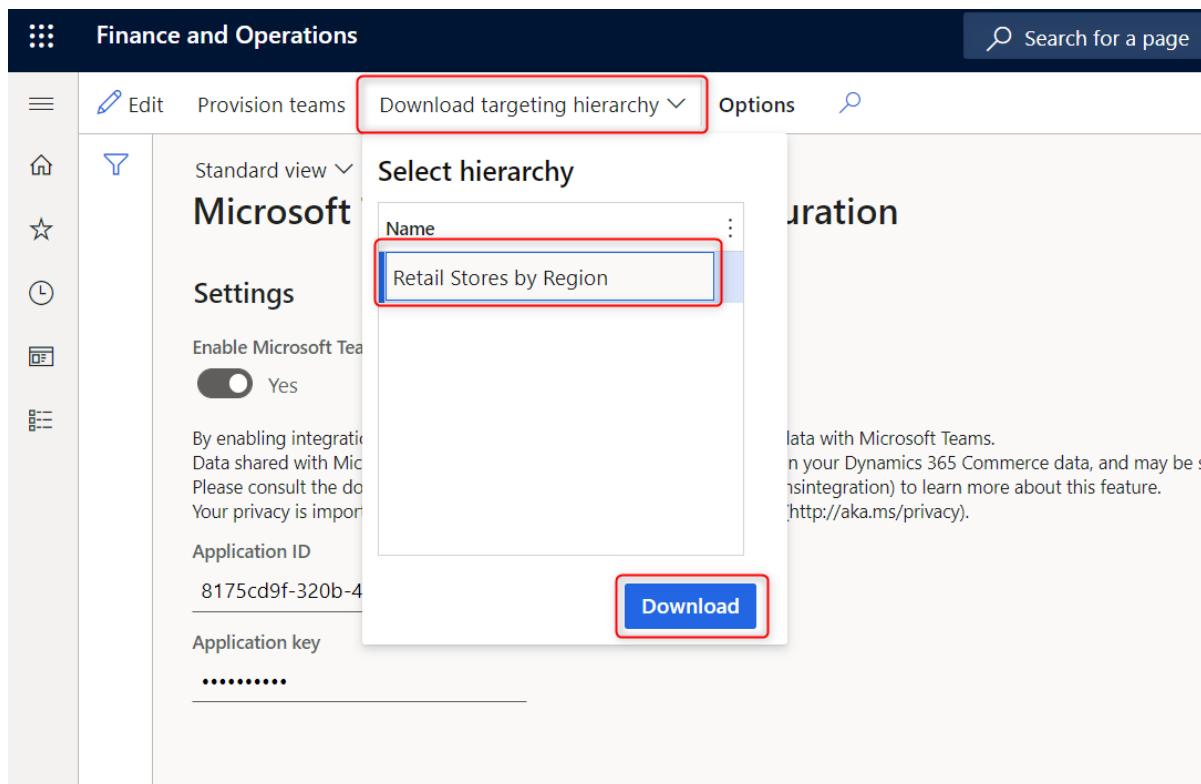
Headquarters setup

Order management

⋮

Retail and Commerce

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 8: Install Microsoft Teams PowerShell module

### Requirements

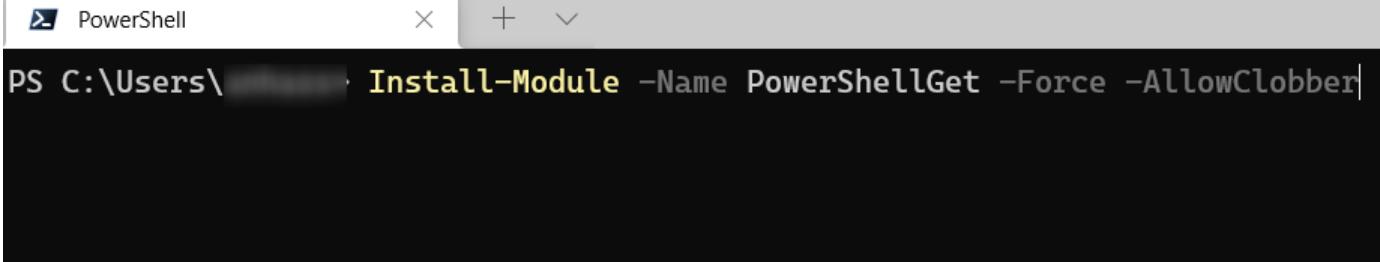
Microsoft Teams PowerShell module requires PowerShell 5.1 or higher on all platforms. Install the [latest version of PowerShell](#) available for your operating system.

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

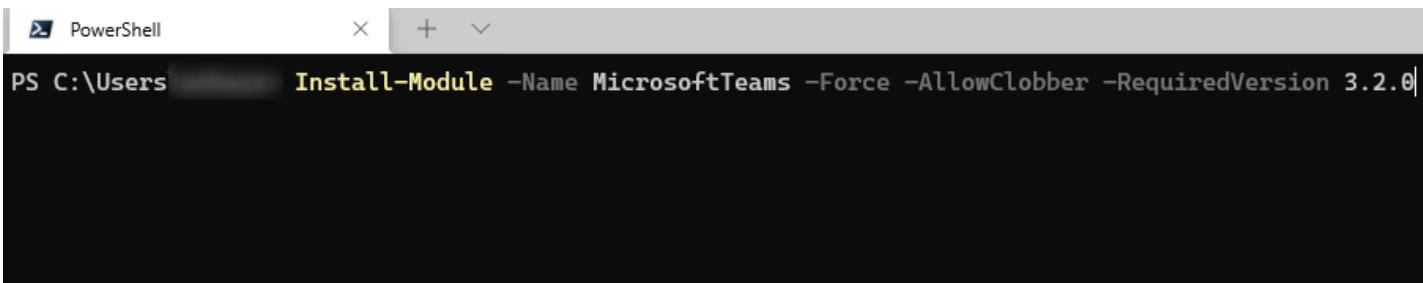
Major Minor Patch PreReleaseLabel BuildLabel
---- -- -- -- -----
7      0       6
```

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



```
PS C:\Users\ [REDACTED] > Install-Module -Name PowerShellGet -Force -AllowClobber
```

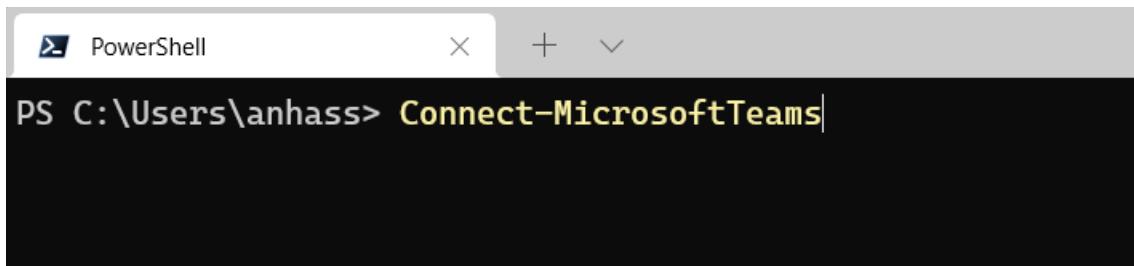
5. Install the Teams PowerShell Module.
6. **Install-Module -Name MicrosoftTeams -Force -AllowClobber**



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

### Task 9: 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



```
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"



```
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
<b>Id</b>	The unique ID for the upload.

<b>Status</b>	Upload status. Values include <b>Starting</b> , <b>Validating</b> , <b>Successful</b> , and <b>Failed</b>
<b>ErrorDetails</b>	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.
<b>LastUpdatedAt</b>	Timestamp and date of when the file was last updated.
<b>LastModifiedBy</b>	The ID of the last user who modified the file.
<b>FileName</b>	The file name of the CSV.

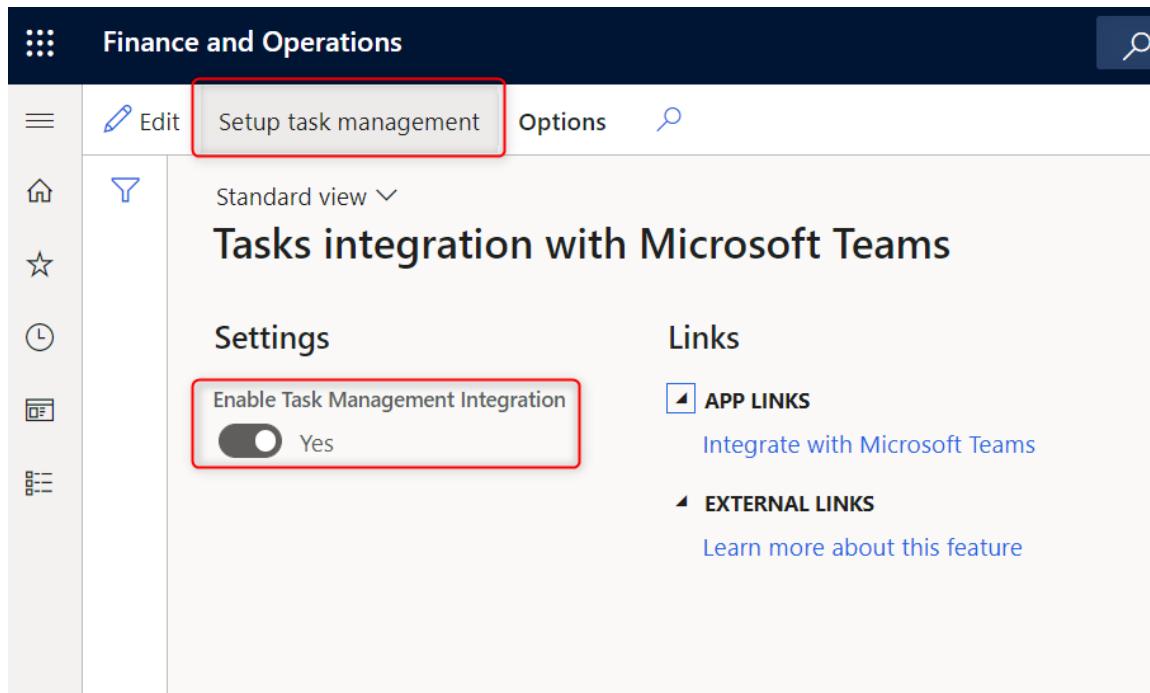
## Task 10: Link POS and Teams for task management

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

The screenshot shows the Dynamics 365 ribbon navigation bar. The 'Retail and Commerce' tab is selected, indicated by a red box around its name. Under the 'Retail and Commerce' tab, the 'Task management' item is also highlighted with a red box. The main menu on the left includes options like 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, Revenue recognition, Sales and marketing, and Service management. The 'Task management' item is part of the 'Retail and Commerce IT' section, which is itself part of the 'Retail and Commerce' category.

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.

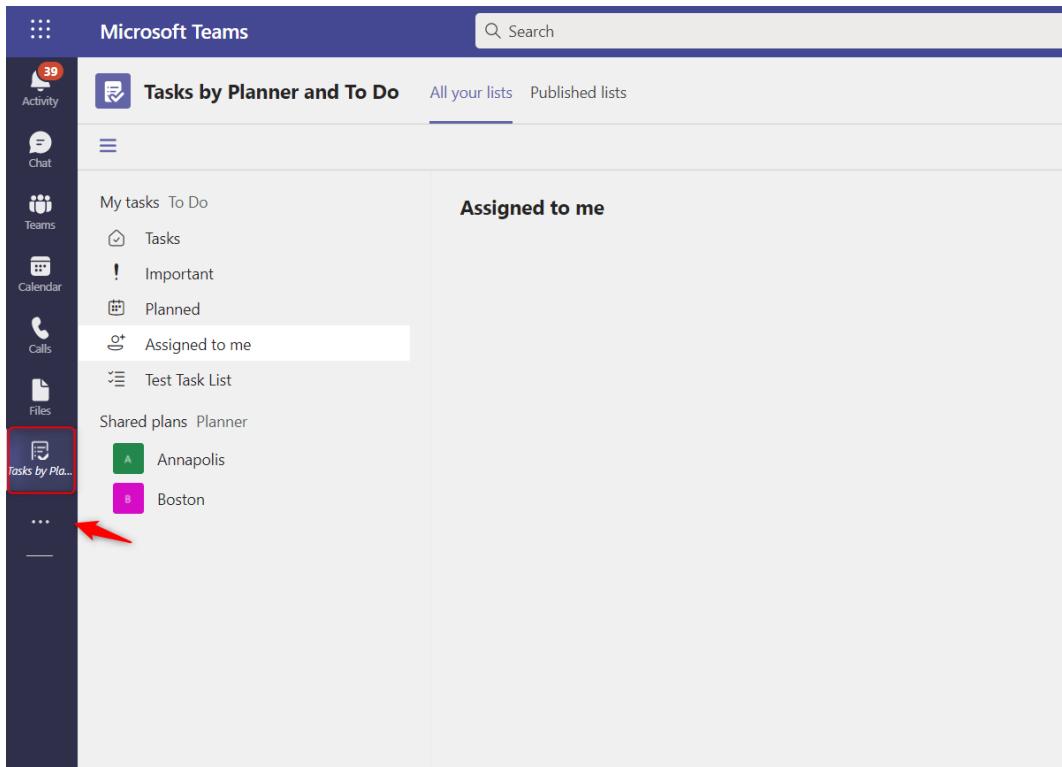
# Exercise 3: Task Management in POS

In this exercise, you will use the three users created in the previous exercise for Retail communication manager , Store manager and store employee to practice how task management works in Dynamics 365 Commerce . Firstly 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 mark them as complete once he completes the task.

## Task 1: Publish a task list in Teams

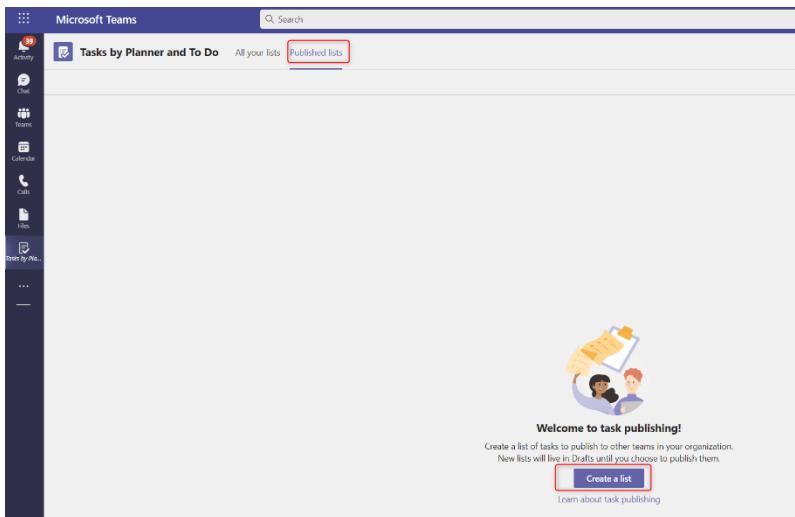
In this task, you will login into Teams as a Retail Communications Manager, create a list of tasks and assigns it to all stores in a region.

1. Sign into Teams web(<https://teams.microsoft.com/>) in a private browser session using the credentials created for Retail communication manager in Exercise 2 -Task 1(Example: Michael Ellen in this exercise).
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.



3. 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.



4. Name the new list **Spring Retail update** from **Retail Communication** and Click Create.
- 

**New list** X

List name

Publish from

Retail Communication ▼

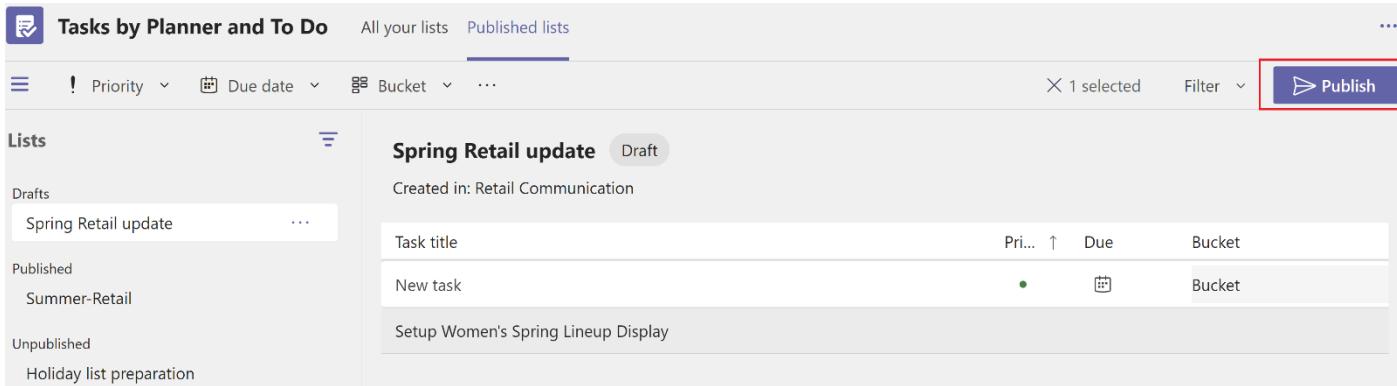
Choose the team who will be publishing the list to its recipient teams.

< Back Create

5. Under **Task title**, give the first task the title **Setup Women's spring lineup display**. Then select **Enter** or **Click on the check mark on the right**.

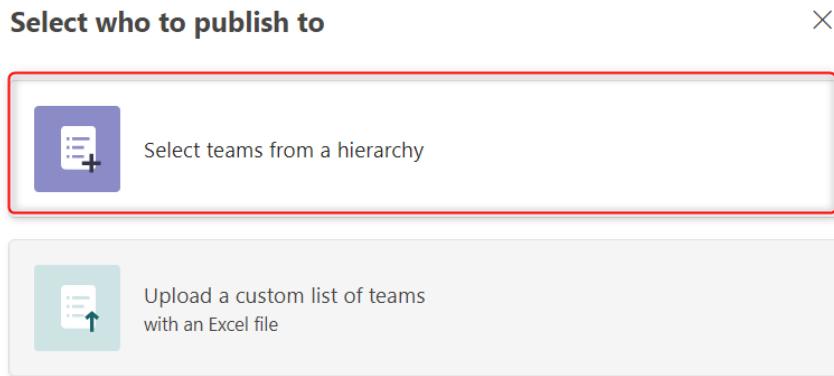
A screenshot of the 'Tasks by Planner and To Do' page. The top navigation bar shows 'Tasks by Planner and To Do', 'All your lists', and 'Published lists'. The 'Published lists' tab is selected. The main area shows a list titled 'Spring Retail update' with a status of 'Draft'. It was 'Created in: Retail Communication'. The list has one task: 'New task' with the title 'Setup Women's Spring Lineup Display'. The task has a priority of '•' and is due. There are filters and a 'Publish' button at the top right. On the left, there's a sidebar with sections for 'Lists', 'Drafts' (containing 'Spring Retail update'), 'Published' (containing 'Summer-Retail'), and 'Unpublished' (containing 'Holiday list preparation').

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



The screenshot shows the Microsoft Planner interface. On the left, there's a sidebar with categories: Lists, Drafts (which is selected), Published, and Unpublished. Under Drafts, there's a list item 'Spring Retail update'. On the right, the main area shows the title 'Spring Retail update' with a 'Draft' status, and it was 'Created in: Retail Communication'. Below this is a table with columns 'Task title', 'Pri...', 'Due', and 'Bucket'. It contains one row with 'New task' and 'Setup Women's Spring Lineup Display'. At the top right of the main area, there are buttons for 'X 1 selected', 'Filter', and a prominent blue 'Publish' button, which is highlighted with a red box.

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.

## Select who to publish to

X

### Teams

33 of 36 selected

#### ▼ Retail Communication

- Contoso Entertainment System Brazil
- Contoso Entertainment System India
- Contoso Retail USA



Cancel

Next

9. On the "Take One last look," screen notice the "Spring retail update" List created in the step below is ready to be published to 33 Teams.

## Take one last look

Retail Communication is about to publish:

### Spring Retail update

1 Tasks    33 Teams

Ready, everything looks good here

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

◀ Back

Cancel

Publish

10. Check Ready, everything looks good here, and click Publish.

11. The Spring retail update List has been published for all 33 Teams. It is now possible to see under Received that all the Teams for each store have received the published task.

The screenshot shows the Microsoft To Do app interface. At the top, there's a navigation bar with a blue icon, the title "Tasks by Planner and To Do", and links for "All your lists" and "Published lists". Below the navigation is a sidebar with a three-line menu icon. The main area is divided into sections: "Lists", "Published", "Unpublished", and "Received".  
  
The "Published" section contains two items:

- Spring Retail update
- Summer-Retail

  
The "Unpublished" section contains one item:

- Holiday list preparation

  
The "Received" section contains five items, each preceded by a red rectangular box:

- Spring Retail update - Annapolis
- Spring Retail update - Atlanta
- Spring Retail update - Atlantic C...
- Spring Retail update - Burlington
- Spring Retail update - Miami

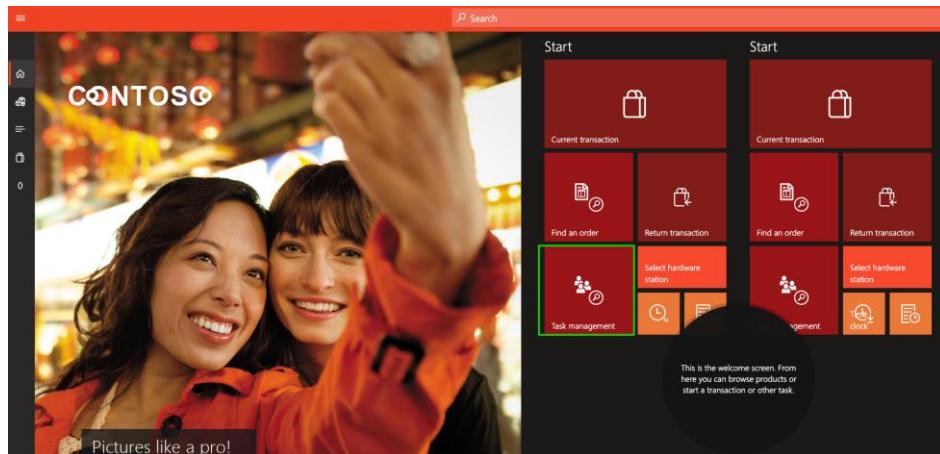
  
A vertical grey bar separates the sidebar from the main content area.

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

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

In this task, you will act as store manager and login into D365 Commerce POS store using the credentials of user Chris Gallagher ([chrisg@powerplatformopenhacks.onmicrosoft.com](mailto:chrisg@powerplatformopenhacks.onmicrosoft.com)) created in exercise 2 -task 1. After logging in to POS you will view unassigned tasks and assign it to the store employees.

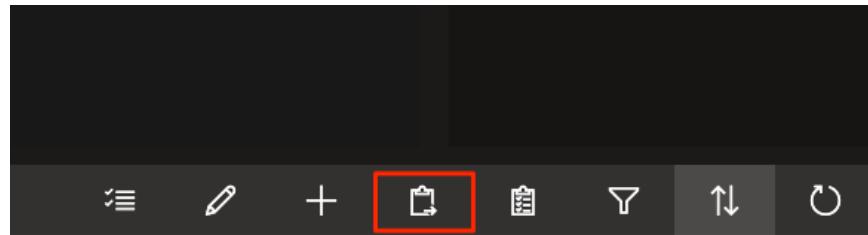
1. Log into Commerce POS and Select a Store to Manage and Assign Tasks.
2. Once logged into Commerce POS Click on Task Management.



3. In **Task Management**, click on **All Tasks**. The Task created in Teams completed in previous exercise should show up in the **All-Tasks** list.
4. Select the **Setup Women's spring lineup setup** task

NAME	ASSIGNED TO	DUE DATE	STATUS
Setup Women's Spr...			Not Started

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



6. Choose Emma Harris (the store employee) to assign the **Task**.

## Choose an employee

For task assignment

Scan or search

Search

Cesar Garcia	000075
Reuben D'sa	000114
Emma Harris	000137

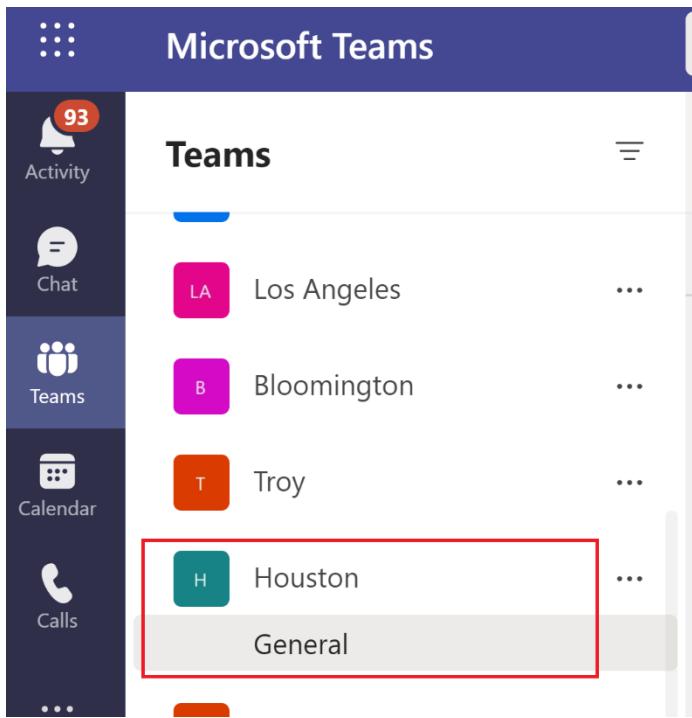
7. On the Task List **Assigned to** field, confirm the task is assigned to Emma Harris

**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 function as store employee (Emma Harris in this example) and review the assigned tasks in Teams and mark them as complete once the assigned task is completed.

1. Log into Teams web and navigate to the assigned store(<https://teams.microsoft.com/>)



- Once logged in, you will see the updates you have received in the activity feed

A screenshot of the Microsoft Teams activity feed. It shows several notifications from Michael: "Michael sent a task list" (4/13) with a note about a Spring Retail update; "Michael sent a task list" (4/13) with a note about a Spring Retail update; "Michael sent a task list" (4/13) with a note about a Spring Retail update; and "Michael sent a task list" (4/13) with a note about a Spring Retail update. To the right, a task card for "Setup Women's Spring Lineup Display" is open, showing details like assignee (Emma Harris), priority (Medium), and due date (04/15/2022).

- Navigate to task planner in Teams and view the assigned tasks under "Assigned to me", click on 'Setup Women's Spring lineup display'

A screenshot of the Microsoft Teams Task Planner. The left sidebar shows filters for Tasks, Important, Planned, Assigned to me (which is selected and highlighted in blue), and Spring Retail plan. The main area shows a list titled "Assigned to me" with one task: "Setup Women's Spring Lineup Display".

- Mark the task 'Setup women's spring lineup display' as complete.

The screenshot shows the Microsoft Planner interface. On the left, there's a sidebar with filters: 'My tasks' (Tasks, Important, Planned, Assigned to me, Spring Retail plan). The main area is titled 'Assigned to me' and contains a task titled 'Setup Women's Spring Lineup Display'. There are buttons for 'Task title' and 'Add a task'.

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

#### Task 4 - Review task list report

The retail communication manager can review the progress of the tasks in the list report

1. Log into Teams web and navigate to the assigned store(<https://teams.microsoft.com/>). In this example you can login as Michael Ellen (the retail communication manager)
2. Once logged in, you can view the task list report and progress of each task by store (*Note: Sometimes it can approximately 5 minutes to update the list report back in Microsoft Teams*)

The screenshot shows the Microsoft Planner interface with the 'List report' tab selected. On the left, there's a sidebar with 'Edit list' and a list of published lists: 'Spring Retail update' (selected), 'Summer-Retail', and 'Holiday list preparation'. The main area shows a report for 'Spring Retail update' published by the Retail Communication team on 4/13, 6:15 PM to 36 teams. It lists three locations: Chicago (0% progress), Cincinnati (0% progress), and Houston (100% progress).

**Congratulations!** You have successfully learned the steps to review the progress of assigned tasks by using the list report