



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



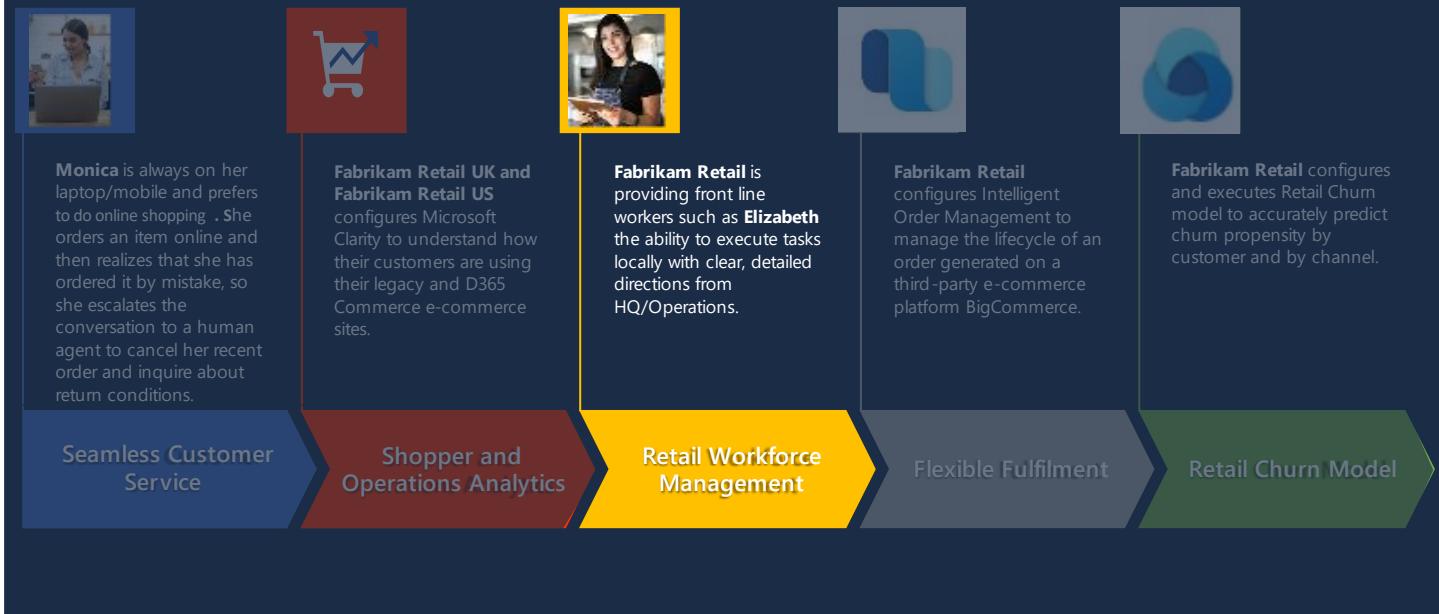
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Learning Objectives

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.

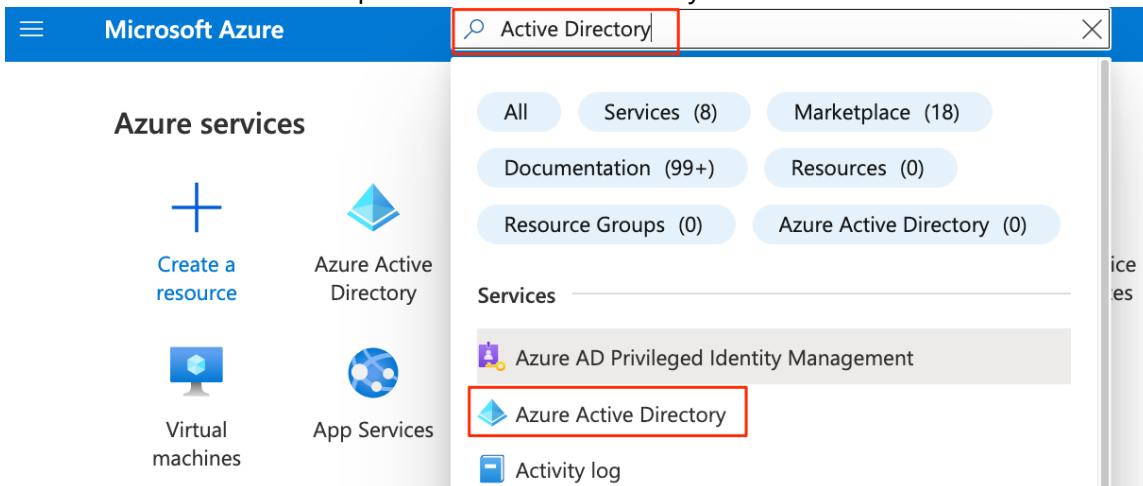
Before you can enable Microsoft Teams integration with Commerce, you must register the Teams application with your tenant in the Azure portal.

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

Home > Microsoft | Overview

Overview Monitoring Tutorials

Search your tenant

Basic information

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

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 Azure AD B2B 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+/) 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
Object ID
Directory (tenant) ID
Supported account types My organization only

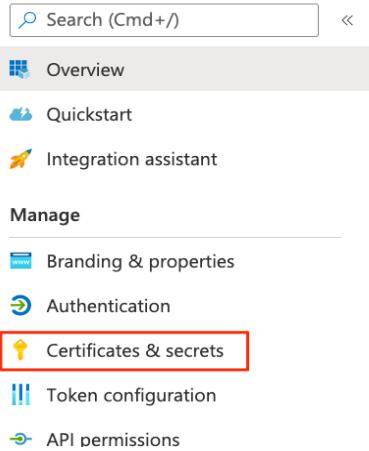
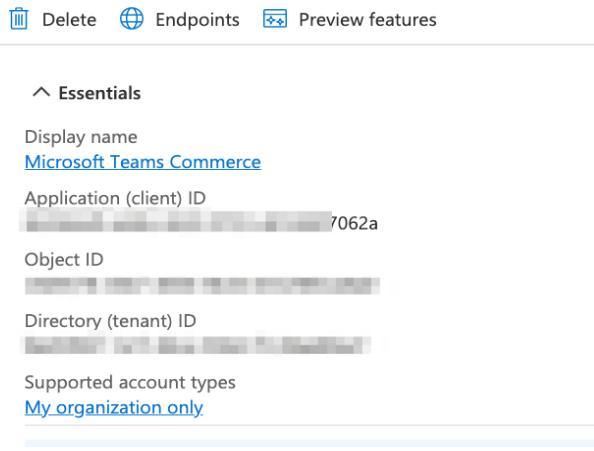
Task 2: Add a Secret to the registered App

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

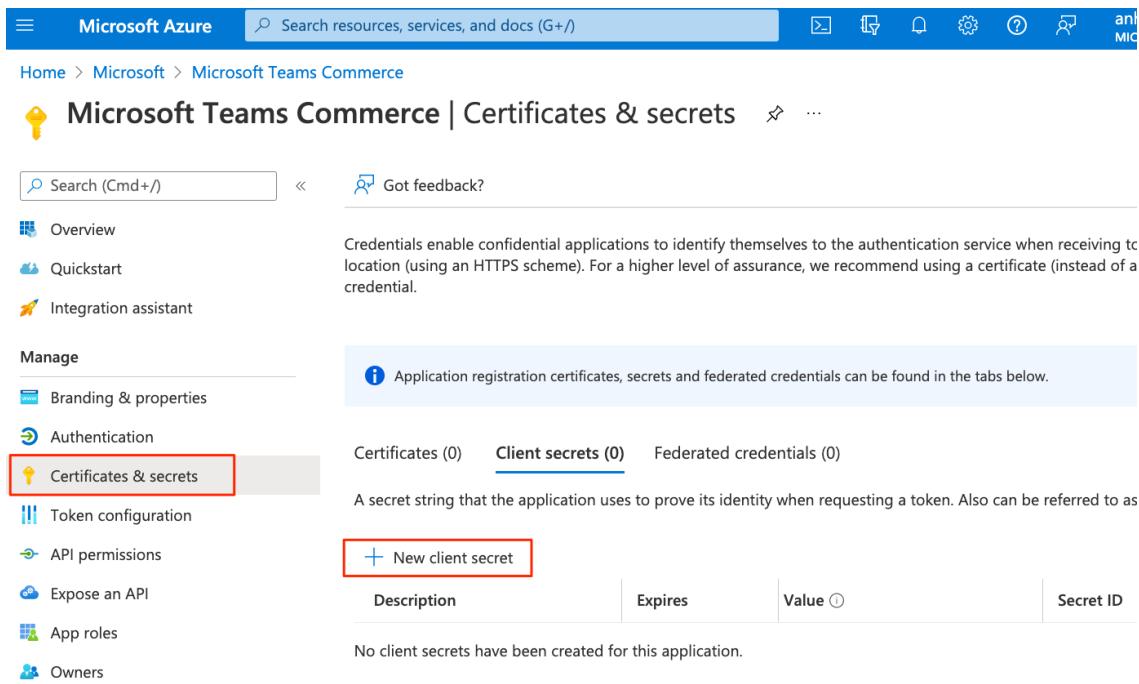
The Microsoft Azure search bar at the top of the screen. It features a magnifying glass icon, the text "Search resources, services, and docs (G+)", and a clear search button.

Home > Microsoft >

Microsoft Teams Commerce

A sidebar menu on the left side of the page. It includes sections for Overview, Quickstart, Integration assistant, Manage (with sub-options like Branding & properties, Authentication, Certificates & secrets, Token configuration, API permissions), and a preview feature for Endpoints.The Microsoft Teams Commerce Overview page. It shows the application's display name as "Microsoft Teams Commerce", its client ID as "7062a", and its object ID and tenant ID. It also indicates that "My organization only" is the supported account type.

2. Click Add New Client Secret

The Microsoft Teams Commerce Certificates & secrets page. It shows a message about the use of credentials for authentication. Below this, there are tabs for Certificates (0), Client secrets (0), and Federated credentials (0). The Client secrets tab is selected, showing a "New client secret" button. The sidebar on the left is identical to the one in the previous screenshot.

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 a 'Manage' section with options like Branding & properties, Authentication, Certificates & secrets, Token configuration, and API permissions, with 'API permissions' highlighted by a red box. The main area shows 'Configured permissions' with a note about admin consent required. A button labeled '+ Add a permission' is highlighted with a red box. Below it is a checkbox for 'Grant admin consent for Microsoft'. The table below has columns for API / Permissions n..., Type, and Description.

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

The screenshot shows the 'Request API permissions' pop-up. Under 'Select an API', the 'Microsoft APIs' tab is selected. It lists 'Commonly used Microsoft APIs' including Microsoft Graph, Azure Communication Services, Azure Data Explorer, and Azure DevOps. The Microsoft Graph card is highlighted with a red box. It describes Microsoft Graph as a single endpoint for Office 365, Enterprise Mobility + Security, and Windows 10.

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, and Manage. Under Manage, 'API permissions' is selected and 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 heading '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 three other options: '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

Manage

- Branding & properties
- Authentication
- Certificates & secrets
- Token configuration
- 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 name	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

A red box highlights the "APIs my organization uses" tab. A red arrow points to the "Microsoft Teams Retail Service" row in the table.

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.
---	---

A red box highlights the "Delegated permissions" section. A red arrow points to the "Delegated permissions" section.

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

Select permissions

[expand all](#)

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.

The screenshot shows the Azure Active Directory App Registrations page. At the top, there are navigation links: '+ New registration', 'Endpoints', 'Troubleshooting', 'Refresh', 'Download', and '...'. Below these are three tabs: 'All applications', 'Owned applications' (which is highlighted with a red box), and 'Deleted applications'. A search bar at the top says 'Start typing a display name to filter the...' and another bar below it says 'Application (client) ID starts with ...'. There is also a 'Add filters' button. The main area displays a table with the following data:

Display name ↑↓	Application (client) ID	Created on ↑↓	Certificates & secrets
Microsoft Teams Commerce	6b5feb9-a64b-4420-...	2/14/2022	Current

3 applications found

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

Microsoft Teams Commerce | Expose an API

Application ID URI

Scopes defined by this API

Define custom scopes to restrict access to data and functionality protected by the API. An application that requires access to parts of this API can request that a user or admin consent to one or more of these.

Adding a scope here creates only delegated permissions. If you are looking to create application-only scopes, use 'App roles' and define app roles assignable to application type. [Go to App roles](#).

Add a scope

Scopes	Who can consent	Admin consent disp...	User consent
No scopes have been defined			

Authorized client applications

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 *

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.

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://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. The top navigation bar includes 'Microsoft Azure' and a search bar. Below the navigation bar, the breadcrumb trail shows 'Home > App registrations > Microsoft Teams Commerce'. The main title is 'Microsoft Teams Commerce | API permissions'. On the left, a sidebar menu lists various management options: Overview, Quickstart, Integration assistant, Manage (with sub-options: Branding & properties, Authentication, Certificates & secrets, Token configuration, API permissions, Expose an API, App roles, Owners, and Roles and administrators), and a preview section. The 'API permissions' option is highlighted with a red box. The main content area is titled 'Configured permissions' and contains a note: 'The "Admin consent required" column shows the default value for an organization. However all the permissions the application needs.' Below this, there is a button labeled '+ Add a permission' with a checkmark and the text 'Grant admin consent for Microsoft'. A table lists the configured permissions: Microsoft Graph (1) with the permission 'User.Read' (Type: Delegated, Description: Sign in and read user profile). At the bottom, a note says '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 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

API / Permissions name Type Description

+ Add a permission Grant admin consent for Microsoft

Microsoft Graph (1)

API / Permissions name	Type	Description
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

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](#) X

Permission	Admin consent required
✓ OpenId permissions (1)	
✓ 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](#) X

Permission	Admin consent required
✓ OpenId permissions (1)	
✓ 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](#) X

Permission	Admin consent required
✓ OpenId permissions (1)	
✓ openid ⓘ Sign users in	No

12. In Select Permissions search for profile

13. Under Permission, check profile

Select permissions expand all

X

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](#) X

Permission	Admin consent required
✓ OpenId permissions (1)	No
profile <small>(1)</small> View users' basic profile	

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.

All applications **Owned applications** Deleted applications

Application (client) ID starts with X [Add filters](#)

3 applications found

Display name ↑	Application (client) ID	Created on ↑	Certificates & secrets
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 interface. 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 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 area has a title "Set up the basics" and a sub-instruction "To get started, fill out some basic information about who you're adding as a user." It includes fields for First name (Michael), Last name (Ellen), Display name * (Michael Ellen), Username * (michaelle...), and Domains (@ PowerPlatformOpenHacks.onmicrosoft.com). A "Next" button is at the bottom.

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

Basics

Product licenses

Optional settings

Finish

Profile info

Job title

Retail communications manager

Department

Fabrikam retail

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

Add a user

Basics

Product licenses

Optional settings

Finish

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

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

Basics

Product licenses

Optional settings

Finish

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

Basics

Product licenses

Optional settings

Finish

Profile info

Job title: Store manager

Department: Fabrikam Retail

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

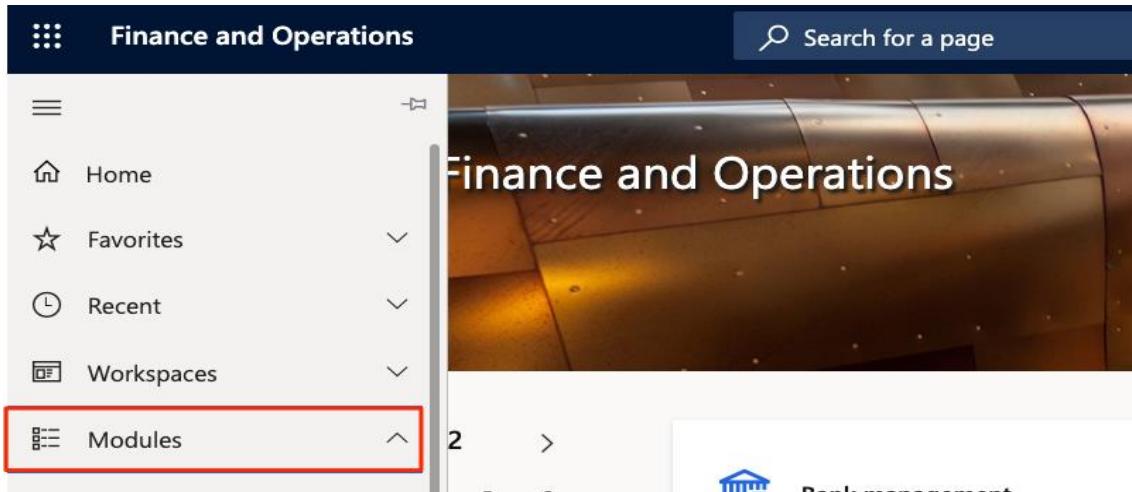
Display name ↑ Username Licenses

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 > Chan
- Store financials > Chan
- Online stores > Fulfill
- Stores > Info c
- All stores > Info c
- Statements > Chan
- Gift cards > attrib
- Credit memos > Store
- Call centers > Store
- 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 'Stores' setup page. The top navigation bar includes 'Edit', '+ New', 'Delete', 'Configuration status', 'Store', 'Set up' (which is highlighted with a red box), 'Options', and a search bar. Below this, there are sections for 'Workers' (with 'Workers' and 'Work shift list' options) and 'Attribute groups' (with 'Channel attributes' and 'Sales order attributes'). On the right, there are sections for 'Copy' (with 'Payment method to store', 'Sections', 'Copy all', 'Payment methods', 'Income/expense account', and 'F') and 'Set up' (with 'Cash declaration', 'Sections', 'Modes of delivery', and 'S'). The main content area is titled 'Stores | Standard view' and shows the details for 'ANAPOL: Annapolis'. The 'General' section contains fields for Identification (Retail Channel Id: 000001, Name: Annapolis, Store number: ANNAPOL, Operating unit number: ---), POS Register (Functionality profile: FN001, Inventory lookup: No), Sales Tax (Tax identification number (TIN), Sales tax group: MD, Prices include sales tax: No, Use destination-based tax: ---), and Profiles (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 'Employees' list page. The top navigation bar includes 'Edit', '+ New', 'Delete', 'As of date', 'Worker' (which is highlighted with a red box), 'Payroll', 'Time', 'Commerce', 'General', 'Options', and a search bar. Below this, there are sections for 'Personnel actions' (Change position, Terminate, 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), and 'Personal information' (Accommodations, Bank accounts, Bank account disbursements, Identification numbers, Injury or illness incidents, Labor unions, Loan, Persc, Bene). The main content area is titled 'Employees | ANNAPOL : ANNAPOLIS' and shows the 'Standard view' with a filter bar. A table lists employees: Chris Gallagher (selected and highlighted with a red box), Emma Harris, and Renata Krausova. The columns include Name, Search name, Personnel number, Phone, Extension, Email address, and Worker type (all listed as Employee).

- 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, there's a sidebar with icons for Home, POS permissions, Media, View, External identity, and a search bar. The main content area is titled 'Employees | ANNEAPOLIS : ANNAPOLIS' and shows a 'Standard view' with a table of employees. The table has columns for Name, Search name, Personnel number, and Phone. Three rows are listed: Chris Gallagher, Emma Harris, and Renata Krausova. The first row, Chris Gallagher, is selected.

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@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 ribbon menu with the following navigation path:

- 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

Under the "Retail and Commerce" section, the following sub-navigation is visible:

- Products and categories
- Catalogs and assortments
- Product recommendations
- Pricing and discounts
- Channels
- Employees
 - Workers
 - Users** (highlighted with a red box)
 - Jobs
 - Positions
 - Permission groups
 - Time and attendance
 - Employee images

2. Select the User ID of Store Manager.

The screenshot shows the "Standard view" user list. A user named "chrисg" is selected, highlighted with a blue border. The list includes columns for User ID, User name, Email, Company, and Person.

User ID	User name	Email	Company	Person
CHRIS	CHRIS	CHRIS@contosoax7.onmicrosoft.com	USMF	
<input checked="" type="checkbox"/> chrисg	Chris Gallagher	chrисg@powerplatformopenhacks.onmicrosoft.com	usrt	Chris Gallagher

3. Select +Assign Roles.

The screenshot shows the user details page for "chrисg : Chris Gallagher". The "User's roles" section contains the following buttons:

- + 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 'Screen layouts' section of the 'POS setup' page. The 'Screen layouts' link is highlighted with a red box. Other links like 'Registers', 'Devices', and 'Channel reports configuration' are also visible.

- < 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**
 - Receipt formats
 - Screen layouts**
 - Layout sizes
 - Button grids
 - Images
 - POS accent colors
 - POS operations
- < 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 of the 'POS setup' page.

Screen layouts:

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

Button grids:

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



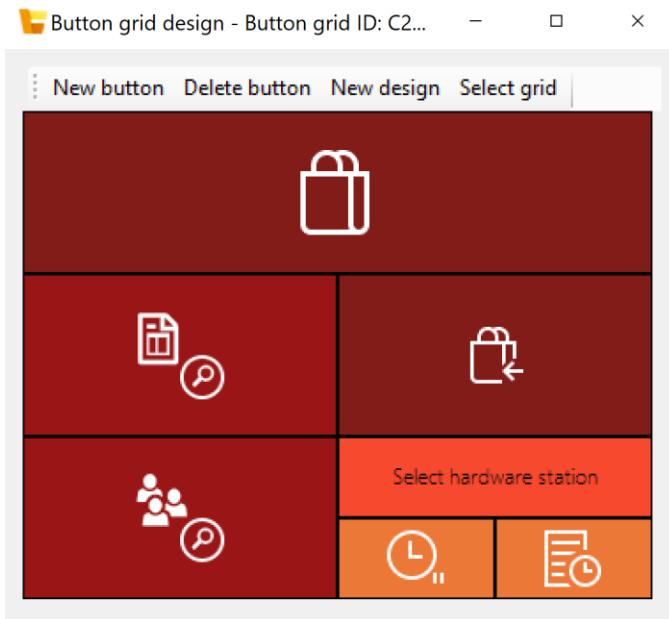
Sign in

mcr [REDACTED] onmicrosoft.com X

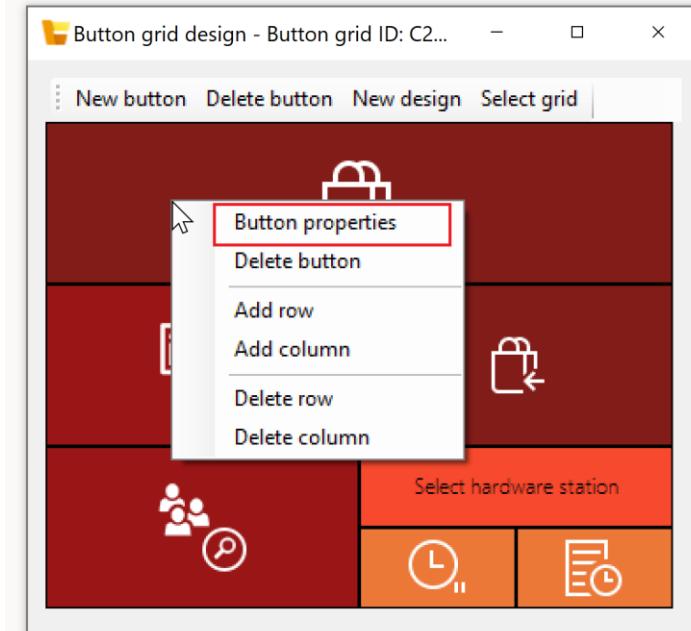
[Can't access your account?](#)

[Next](#)

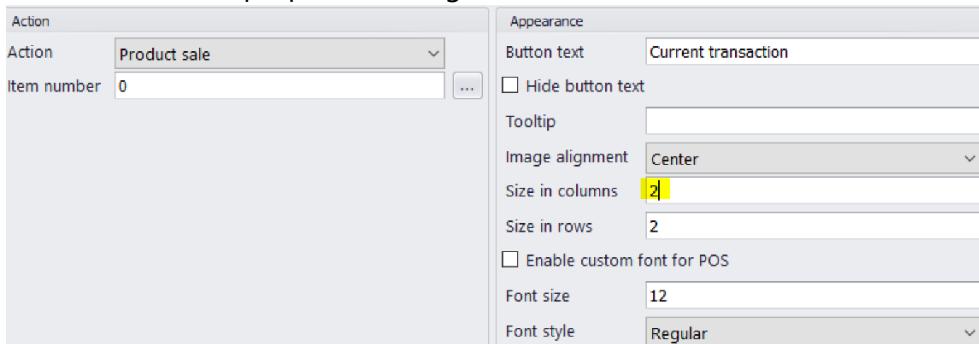
4. The designer will show the screen layout editor as below



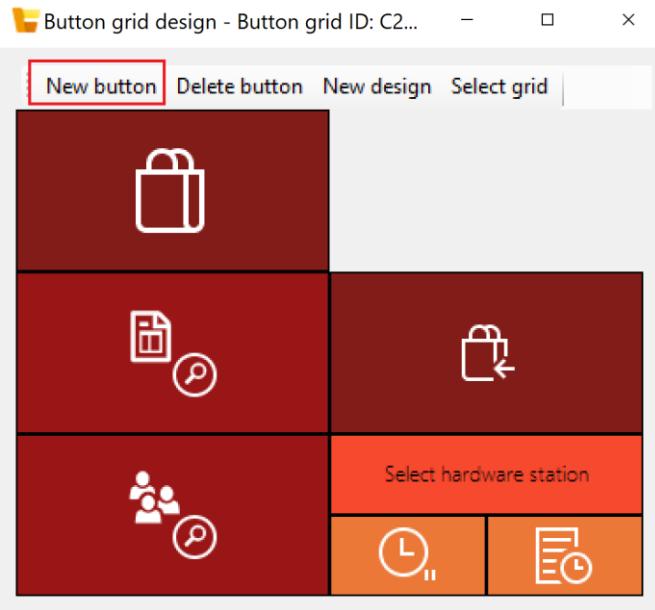
5. As part of this task we will add a button for "task management" next to the "current transaction" button. Right click on first button with shopping bag icon and click button properties



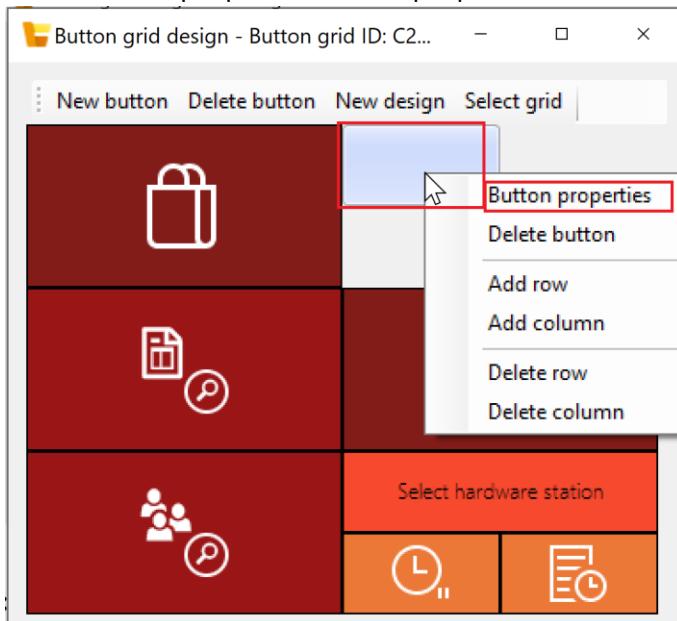
6. In the button properties change the "Size in columns" from 4 to 2 as below and save



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



- Click "Button properties" to set properties for the new button



- Click "Button properties" to set properties for the new button

Action: Task management

Button text: Task management

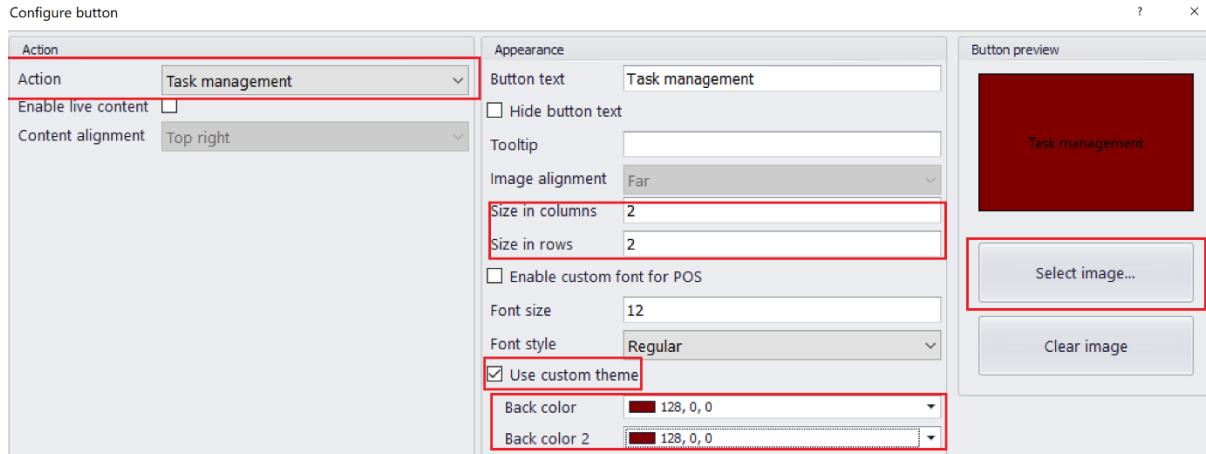
Size in columns:2

Size in rows:2

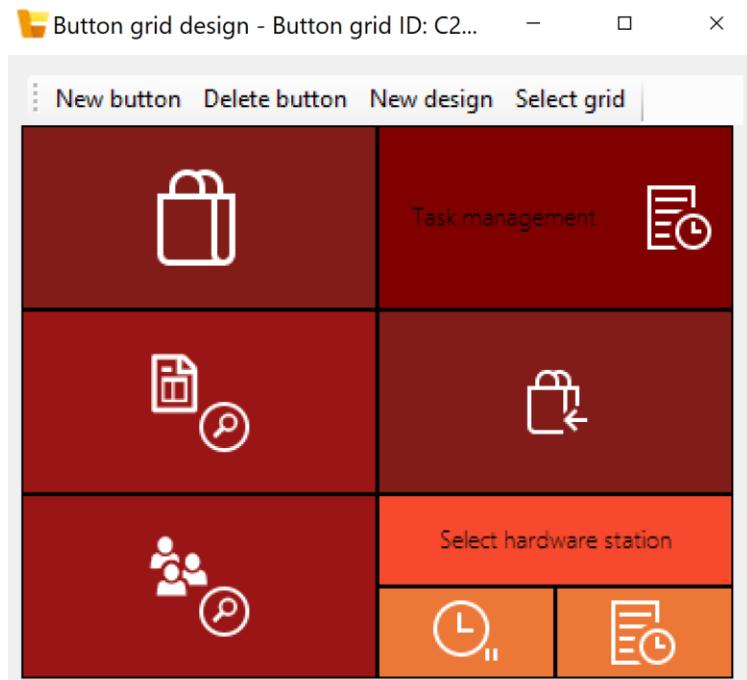
Use custom theme: Check

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

Edit + New Delete Create batch job Run now History Options 🔍

Standard view ▾

Distribution schedules

Name	Description
9999	All jobs

General

Direction of data flow	Active
Download	<input checked="" type="checkbox"/> Yes

Channel database groups

+ Add Remove	<input type="radio"/> Channel database group
<input checked="" type="radio"/> Default	

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

Edit + New Delete Create batch job Run now History Options 🔍

Standard view ▾

Distribution schedules

Name	Description
1160	POS redeployment
1170	POS task recorder
1180	Generic tax engine
1190	Electronic reporting configurations
1200	Return quantities
9999	All jobs

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

Edit + New Delete Create batch job Run now History Options 🔍

(i) The Incremental sync with schedule '9999' job is added to the batch queue.

Standard view ▾

Distribution schedules

Name	Description
9999	All jobs

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

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 Microsoft Dynamics 365 Finance and Operations interface. 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. Under 'Retail and Commerce', 'Channel setup' and 'Microsoft Teams Integration Configuration' are listed. Both of these items are highlighted with red boxes. The main content area shows a hierarchical list of sub-modules under 'Channel setup' and 'Microsoft Teams Integration Configuration'.

- 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
 - Channel setup
 - 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

Save Provision teams Download targeting hierarchy Options

Standard view Microsoft Teams Integration Configuration

Settings

Enable Microsoft Teams Integration

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

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

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

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

- 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 I
Configure perf
System paramet
Client perform
Personalization
Office app para
Configure cros
Azure Active D
Key Vault para
Certificate prof
Throttling priori
B2B Invitation i
Custom fields
Alert rules
Refresh elemen
Integration cor
Business ev
Database lo

8. Wait until this job has finished running.

Finance and Operations

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	Create a custom alert
Personalize this page	Record info	Manage my alerts
Add to workspace	Advanced filter or sort	Get a link

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 (also highlighted with a red box), and others like Teams settings, Policies, and Apps. The main area is titled "Manage teams" and contains a "Users summary" section showing 486 total users, 484 internal users, and 2 guests. Below this is a table of teams, with a red box highlighting the first five rows: Atlanta, Atlantic City, Annapolis, Boston, and Cambridge. The table columns include Name, Standard channels, Private channels, and Privacy.

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
Rutherford	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 within a team's settings. It lists three members: Chris Gallagher, Emma Harris, and Renata Krausova. Each member is represented by a small profile picture, their name, email address, and role. A red box highlights the list of members. The tabs at the top are "Members", "Channels", and "Settings".

Display name	Username	Title	Location	Role
Chris Gallagher	emmah@powerplatformmo...	-	-	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

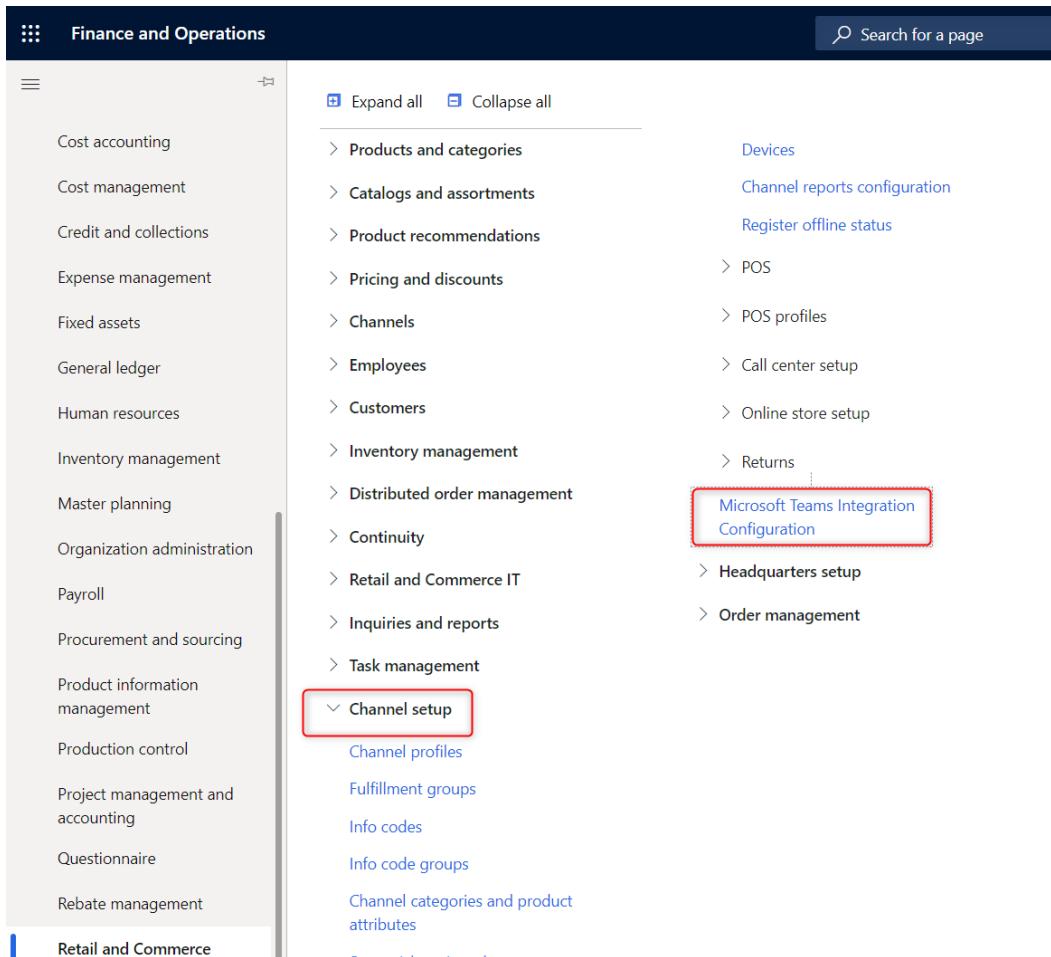
Online store setup

Returns

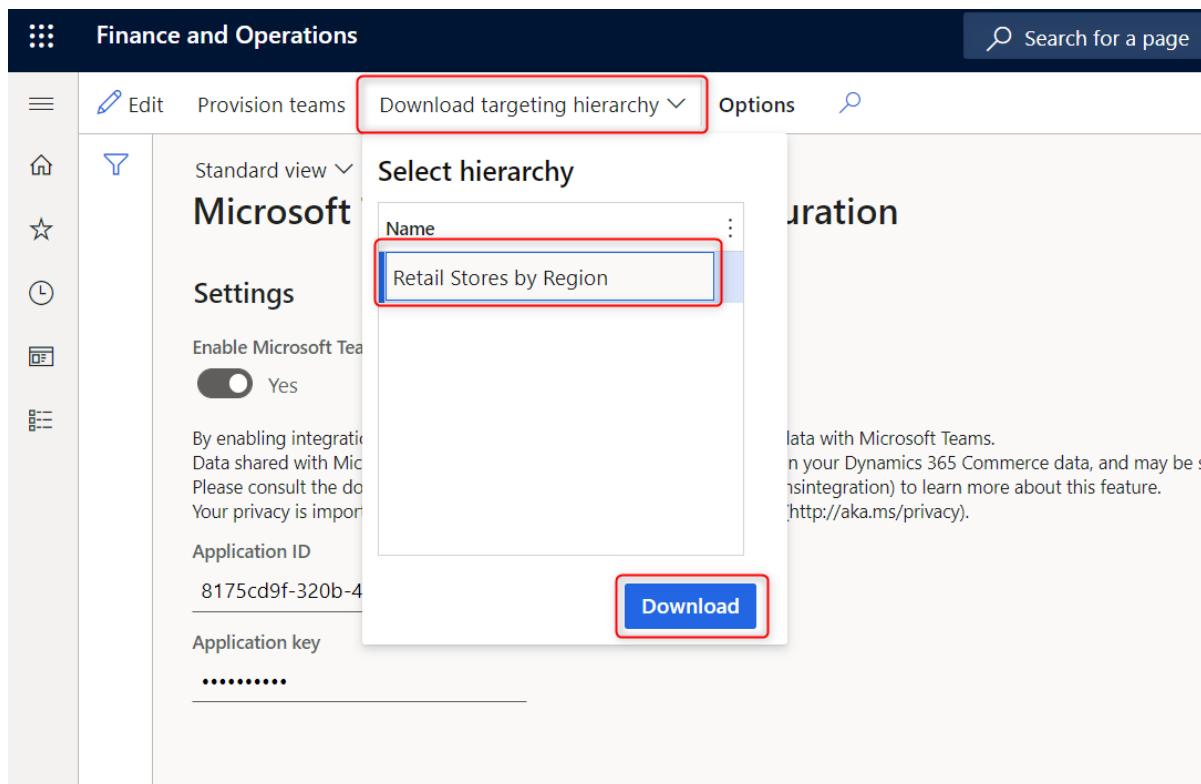
Microsoft Teams Integration Configuration

Headquarters setup

Order management



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

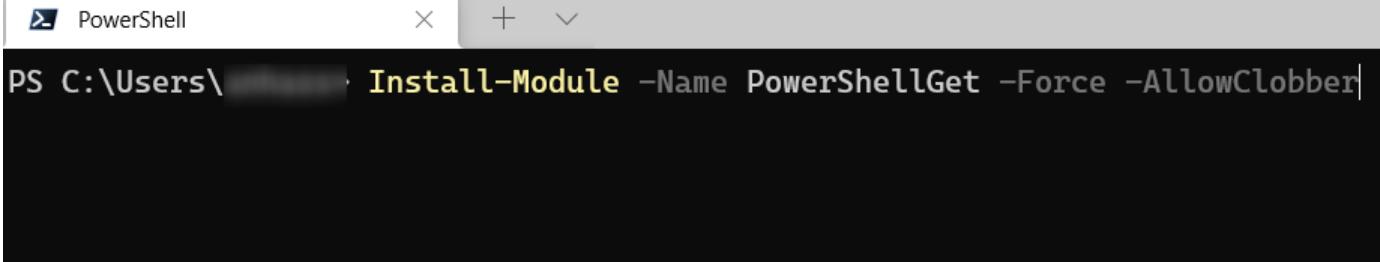
Microsoft Teams PowerShell module requires PowerShell 5.1 or higher on all platforms. Install the [latest version of PowerShell](#) available for your operating system.

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

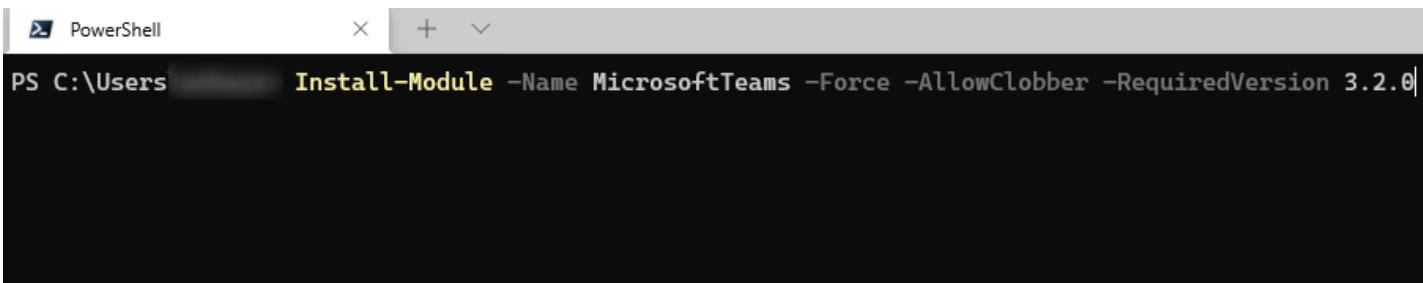
Major Minor Patch PreReleaseLabel BuildLabel
---- -- -- -- -----
7      0       6
```

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



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

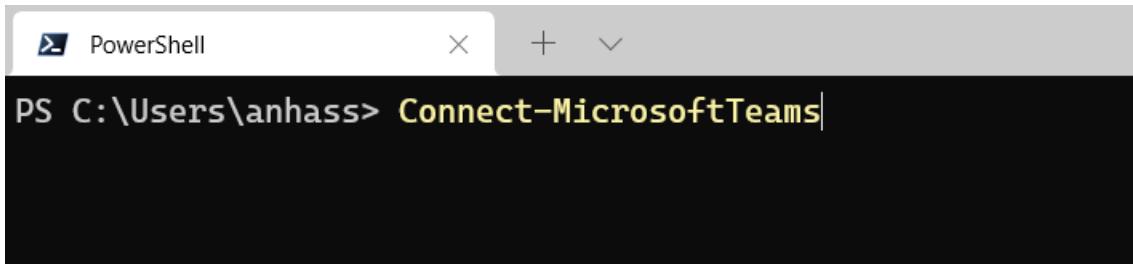
5. Install the Teams PowerShell Module.
6. **Install-Module -Name MicrosoftTeams -Force -AllowClobber**



```
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
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.

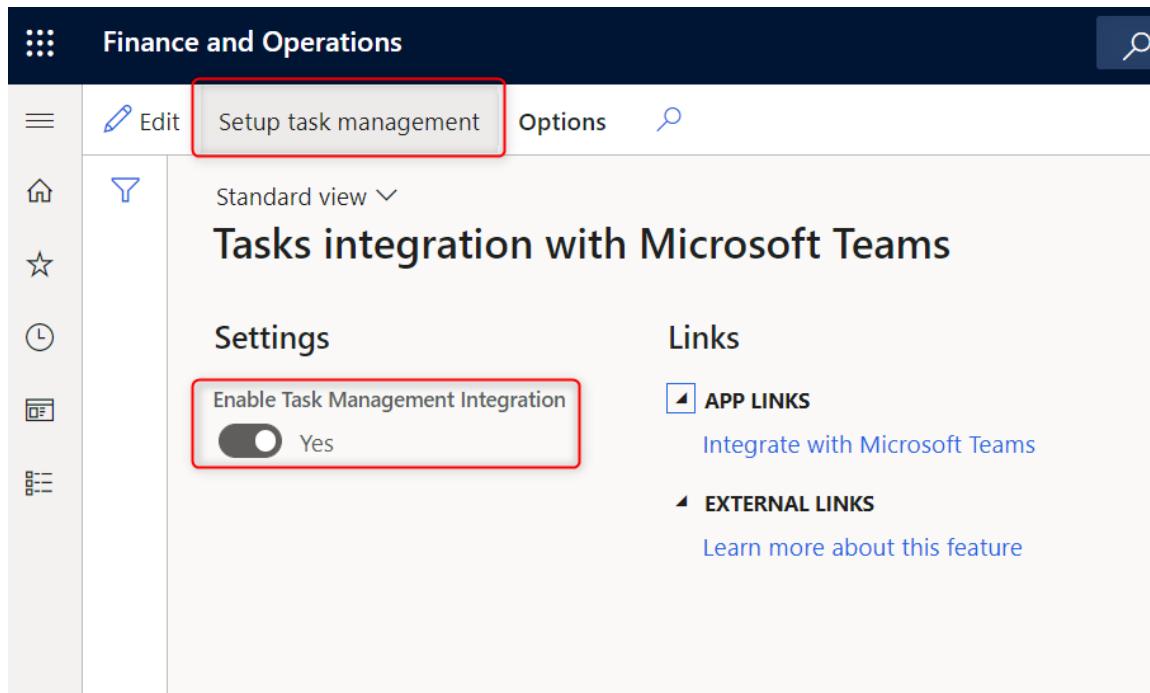
Task 10: Link POS and Teams for task management

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. Other items in this section include Task management processes, Task management administration, and Tasks integration with Microsoft Teams.

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.

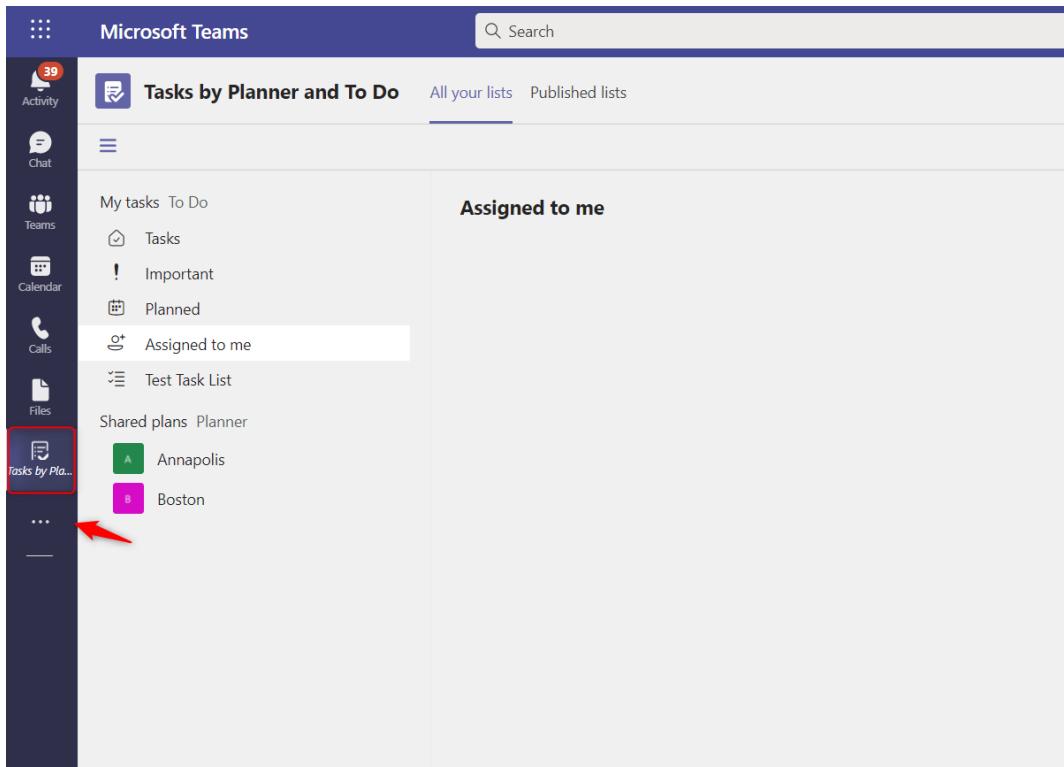
Exercise 3: Task Management in POS

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

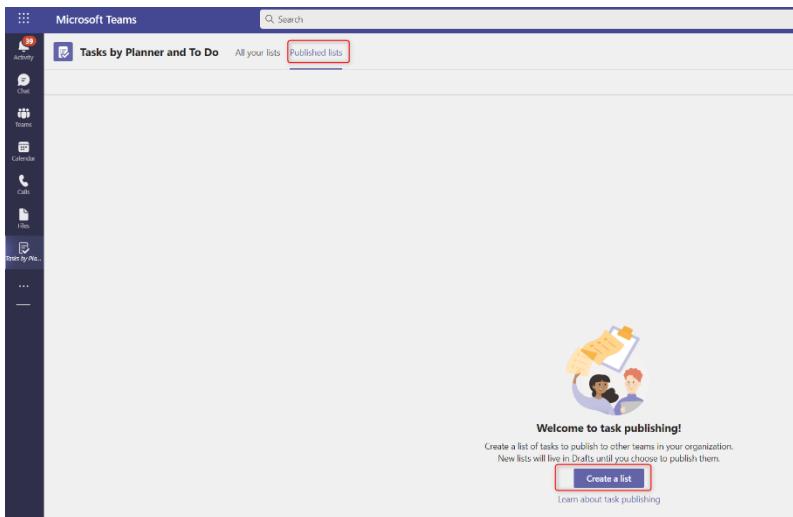
In this task, you will login into Teams as a Retail Communications Manager, create a list of tasks and assigns it to all stores in a region.

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

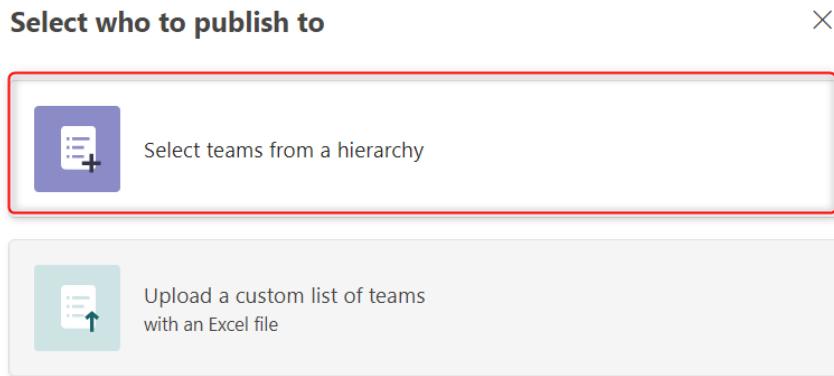
5. Under **Task title**, give the first task the title **Setup Women's spring lineup display**. Then select **Enter or Click on the check mark on the right**.

A screenshot of the Microsoft Teams Tasks by Planner and To Do interface. The top navigation bar shows 'Tasks by Planner and To Do' and 'All your 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 the 'Retail Communication' team. The list contains one task: 'New task' with the subtitle 'Setup Women's Spring Lineup Display'. The task has a priority indicator (green dot) and a due date indicator (calendar icon). The right side of the screen shows filter and publish buttons. The bottom left sidebar lists 'Lists' under 'Drafts' (Spring Retail update), 'Published' (Summer-Retail), and 'Unpublished' (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 titled 'Spring Retail update'. On the right, the main area shows the tasks in this list: 'New task' and 'Setup Women's Spring Lineup Display'. At the top right, there are filters for Priority, Due date, Bucket, and a 'Publish' button, which is highlighted with a red box. Below the publish button are other options: 'X 1 selected', 'Filter', and three dots.

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 'Tasks by Planner and To Do' interface. At the top, there are navigation links: 'All your lists' and 'Published lists'. Below this, there's a sidebar with a menu icon and sections for 'Lists', 'Published', 'Unpublished', and 'Received'. The 'Published' section contains a list item 'Spring Retail update' with a 'Published' badge. The 'Unpublished' section contains 'Holiday list preparation'. The 'Received' section contains five items, each preceded by a small red square icon: 'Spring Retail update - Annapolis', 'Spring Retail update - Atlanta', 'Spring Retail update - Atlantic C...', 'Spring Retail update - Burlington', and 'Spring Retail update - Miami'. A red rectangular box highlights the 'Received' section.

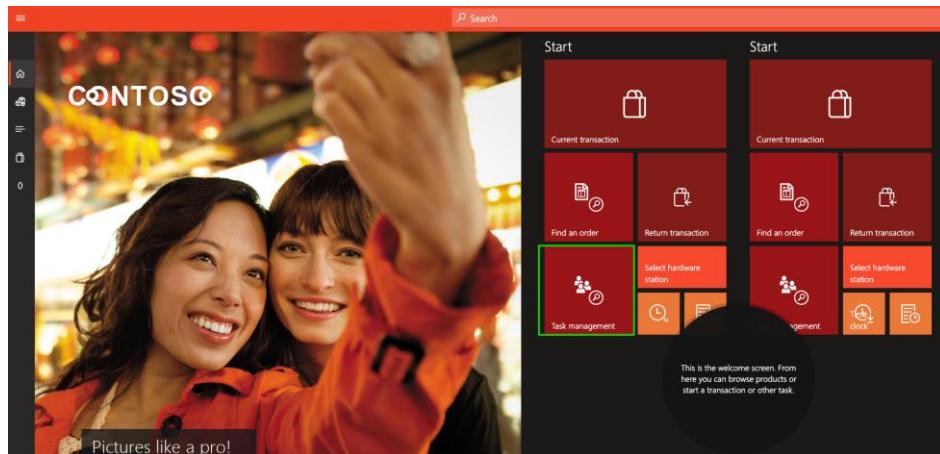
Section	Task
Received	Spring Retail update - Annapolis
	Spring Retail update - Atlanta
	Spring Retail update - Atlantic C...
	Spring Retail update - Burlington
	Spring Retail update - Miami

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 (chrsg@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.

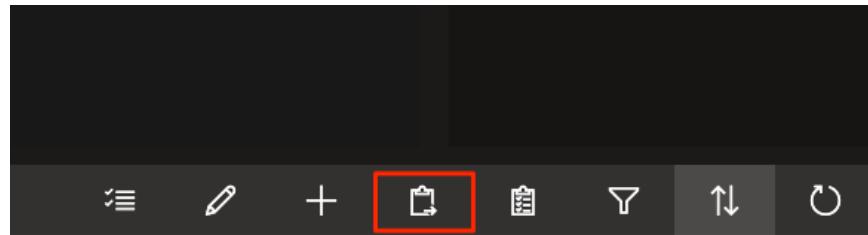
1. Log into Commerce POS and Select a Store to Manage and Assign Tasks.
2. Once logged into Commerce POS Click on Task Management.



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 Spri...			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

Cesar Garcia

000075

Reuben D'sa

000114

Emma Harris

000137

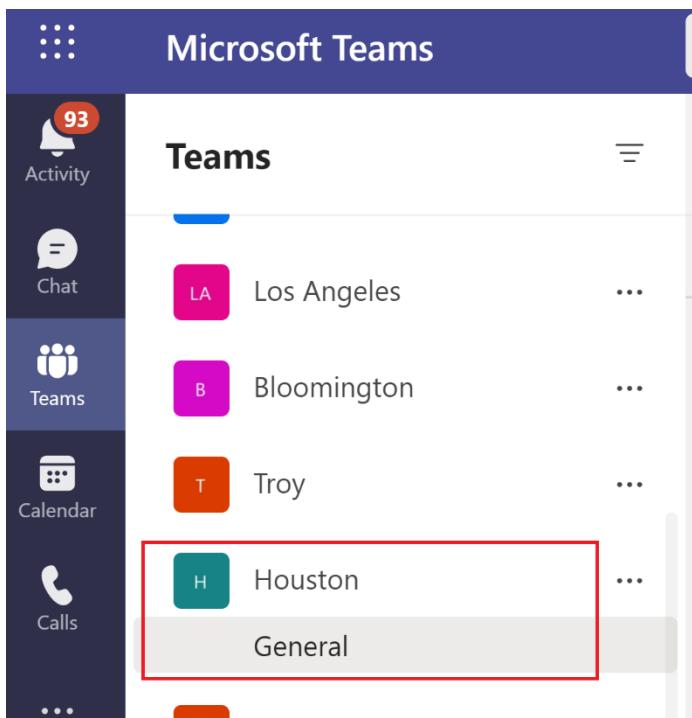
7. On the Task List **Assigned to** field, confirm the task is assigned to Emma Harris

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

This screenshot shows the Microsoft Teams activity feed and a task planner overlay. The activity feed on the left shows several notifications, including tasks assigned by Chris and Michael. The task planner overlay on the right shows a detailed view of a task assigned to Emma Harris: 'Setup Women's Spring Lineup Display'. The task details include the assignee, priority (Medium), progress (Not started), start date (anytime), 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'

The Microsoft Teams task planner interface is displayed. On the left, there are filters for 'My tasks', 'To Do', 'Tasks', 'Important', 'Planned', 'Assigned to me' (which is selected and highlighted in blue), and 'Spring Retail plan'. On the right, the 'Assigned to me' section is shown, listing the task 'Setup Women's Spring Lineup Display' with its details: Task title, Add a task button, and a progress bar indicating it is not started.

- 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 icons for Tasks, Important, Planned, Assigned to me (which is selected), and Spring Retail plan. The main area is titled 'Assigned to me' and contains a task titled 'Setup Women's Spring Lineup Display'. Below it is a 'Task title' input field and a 'Add a task' button.

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 and unpublished tasks. The main area shows a task titled 'Spring Retail update' (Published) with a progress report for three locations: Chicago (0%), Cincinnati (0%), and Houston (100%).

Location	Progress
Chicago	0%
Cincinnati	0%
Houston	100%

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