

Improve User Adoption with Help Panes in model-driven apps

Raphaël Pothin – 02/22/2020





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Who am I?



Power Platform Enthusiast



Business Solutions Consultant

(Dynamics 365 Sales, Project Service Automation and Human Resources)



[@RaphaelPothin](https://twitter.com/RaphaelPothin)



[Raphael POTHIN](https://www.linkedin.com/in/RaphaelPOTHIN)



[Raphaël Pothin](https://www.masthead.com/profile/Raphaël%20Pothin)



raphael.pothin@gmail.com



Raphaël Pothin



Agenda

- 1** | Introduction to User Adoption concept
- 2** | Help features in model-driven apps
- 3** | How Help Panes can help you improve your user adoption?

Introduction to User Adoption concept



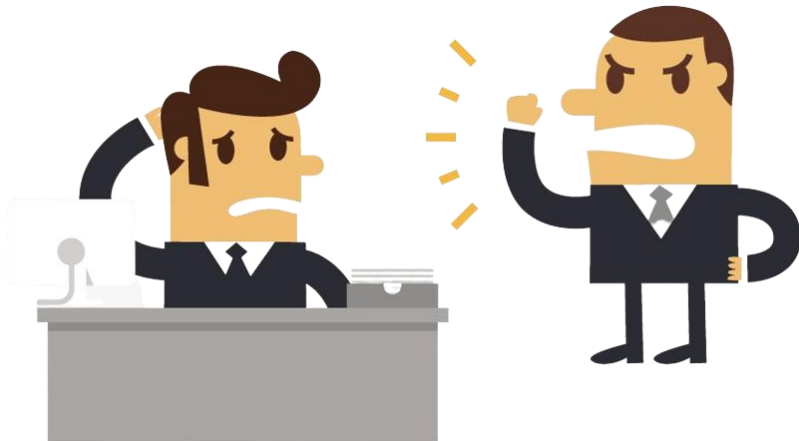
Illustration of User Adoption

Project: Deployment of Dynamics 365 Sales to replace Excel files



Wine Company

Did not invest on user adoption

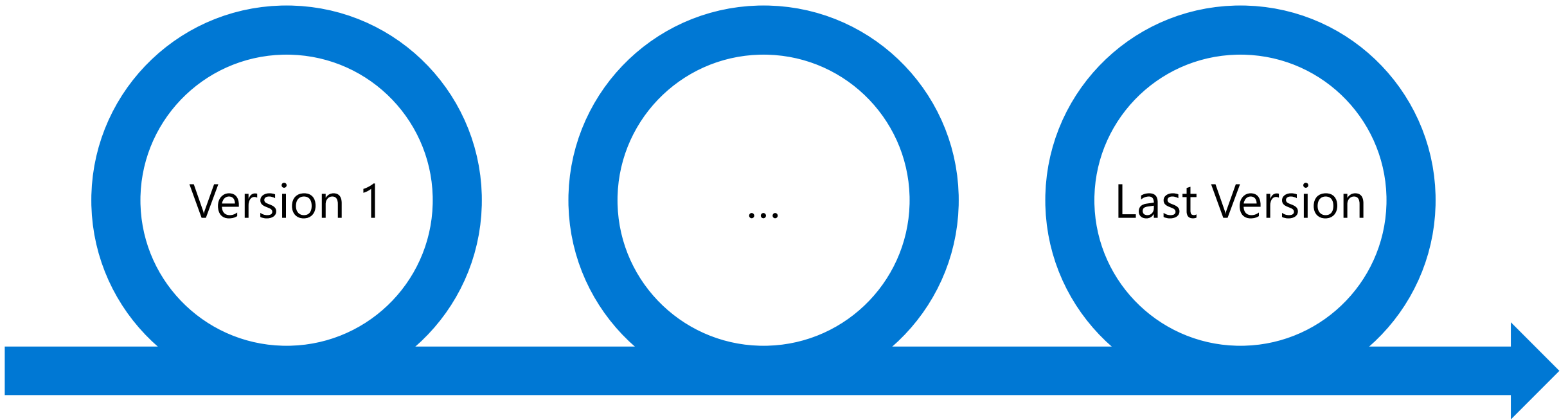


Beer Company

Did invest on user adoption



When invest in User Adoption?



For me, we should invest in User Adoption during all the life cycle of our applications!

User Experience Survey

Please give us your impressions in the use of our new application.

* Required

1. Global rate for your user experience in the application *

☆☆☆☆☆


2. Rate of the design of the application *

☆☆☆☆☆

3. Do you find this application simple to understand and to use? *

☆☆☆☆☆

Submit



Office 365

% of active users

69.19%

Metrics valid for

April 2019

% of returning users

93.85%

Adoption overview



Help features in model-driven apps

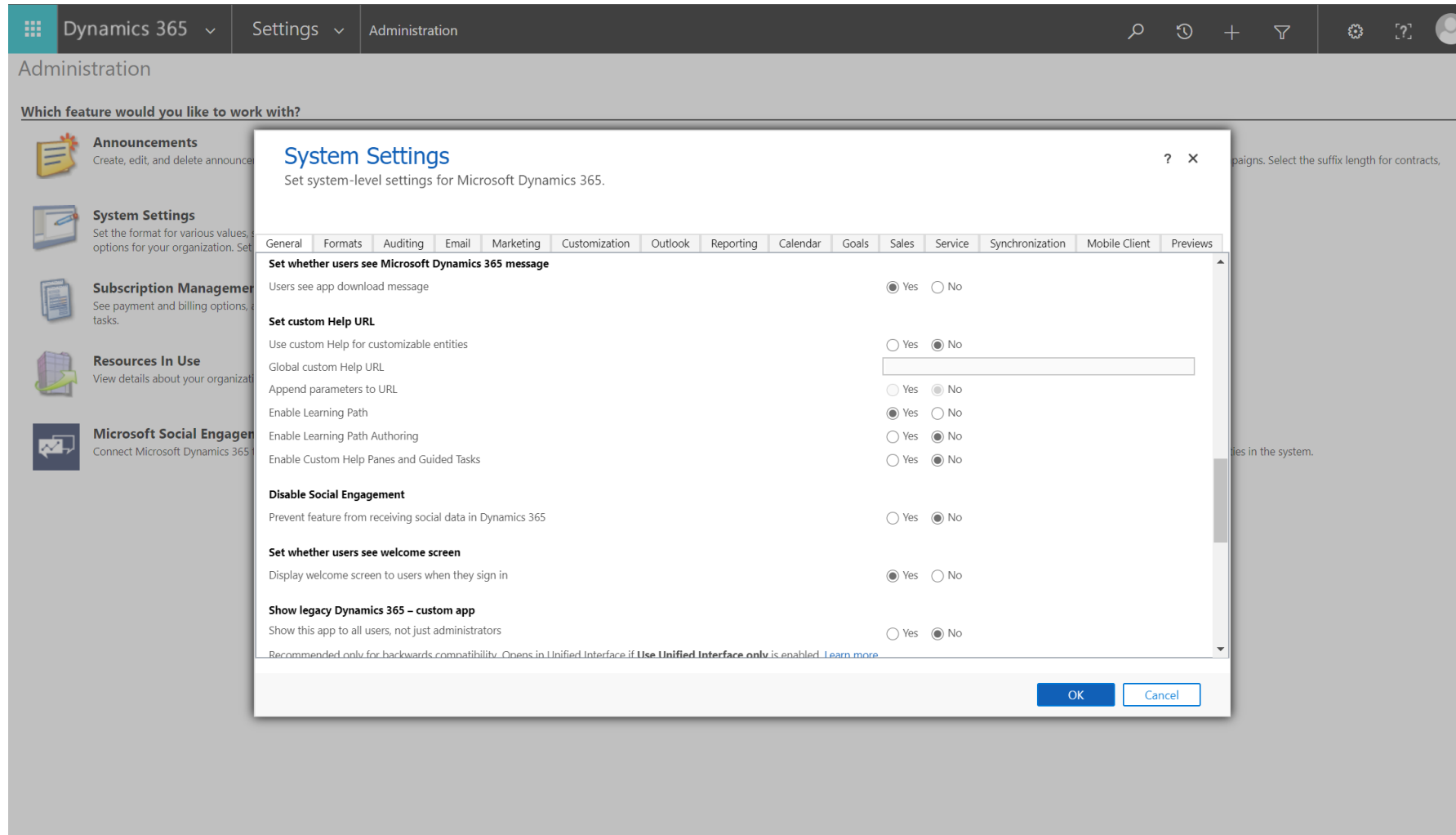
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3 main help modes in model-driven apps

- By default, redirection to the Microsoft documentation
- Configure a custom help URL where users will be able to find the resources they need
- Last but not least, enable Help Panes that provide an immersive help experience for the users

Switch between different kind of help features



How Help Panes can help you improve your user adoption?



Demo

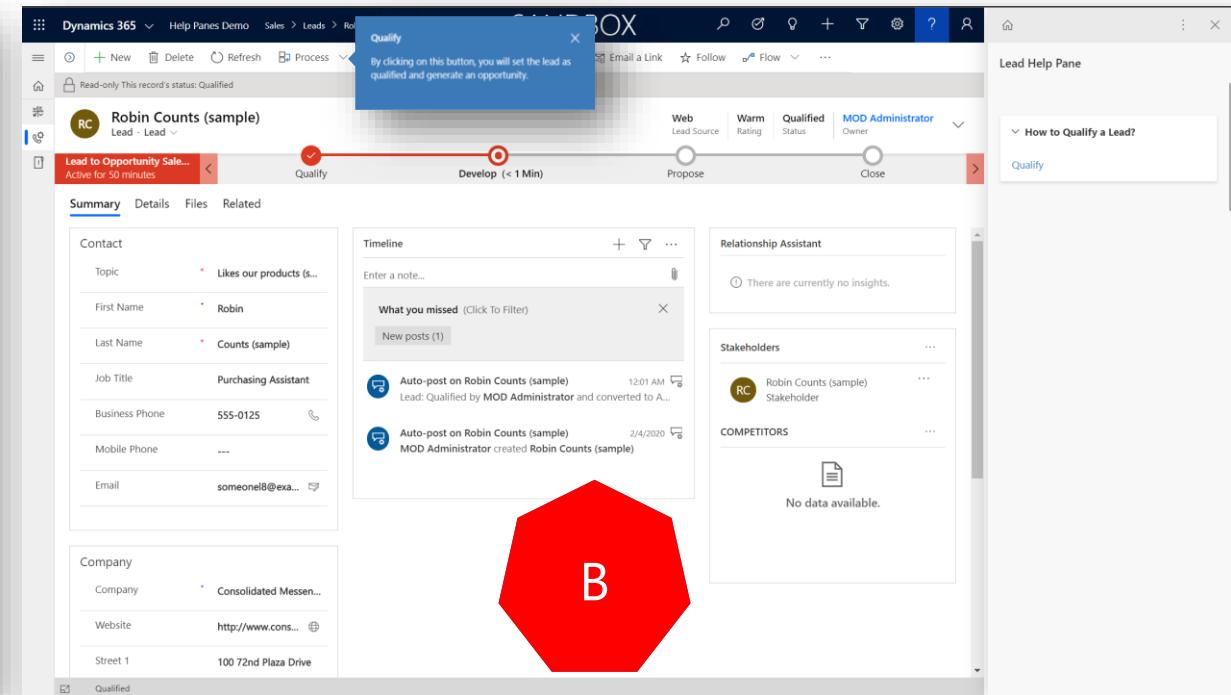
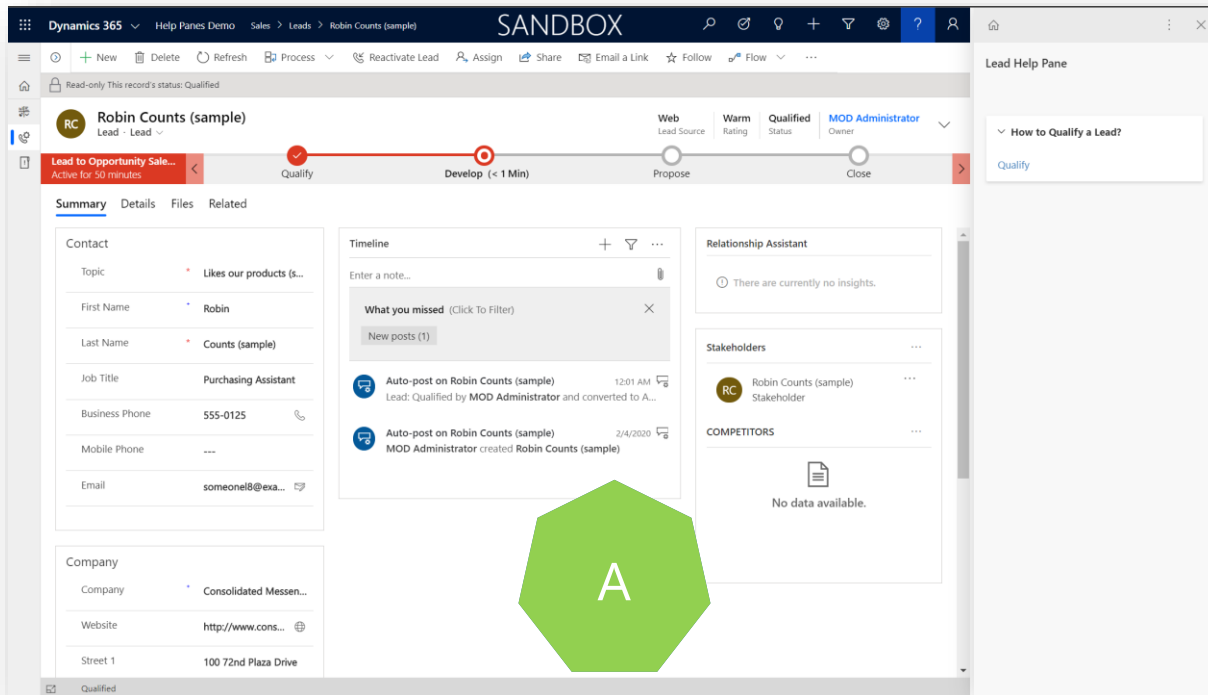
Configuration of an Help Pane

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Quizz – Question 1

If I click on the **ballon link** regarding the **Qualify button** in the Lead main form Help Pane for a **qualified Lead**, what will happen?



Demo

Manage Help Panes in the ALM

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Quizz – Question 2

I would like to **update the configuration of a balloon in a Help Pane**. How can I do it?

Solution A

In the Help Pane in Edit mode, click on the balloon, then edit its configuration.

Solution B

In the Help Pane in Edit mode, delete the balloon link then recreate it with the new configuration.

Solution C

In the Help Page record, edit the content carefully, then save it and finally save and publish the solution.

Questions?

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Thank You!



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