DIRECTIONS 4 PARTNERS

# Onboarding from the perspective of an ISV

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Product Manager @ 4PS

AGENDA

# ONBOARDING FROM THE PERSPECTIVE OF AN ISV

- To set the stage: Who is 4PS?
- What does Microsoft offer for onboarding?
- Where could I begin now?
- Use cases: Opportunities and challenges
- A tool to generate onboarding content

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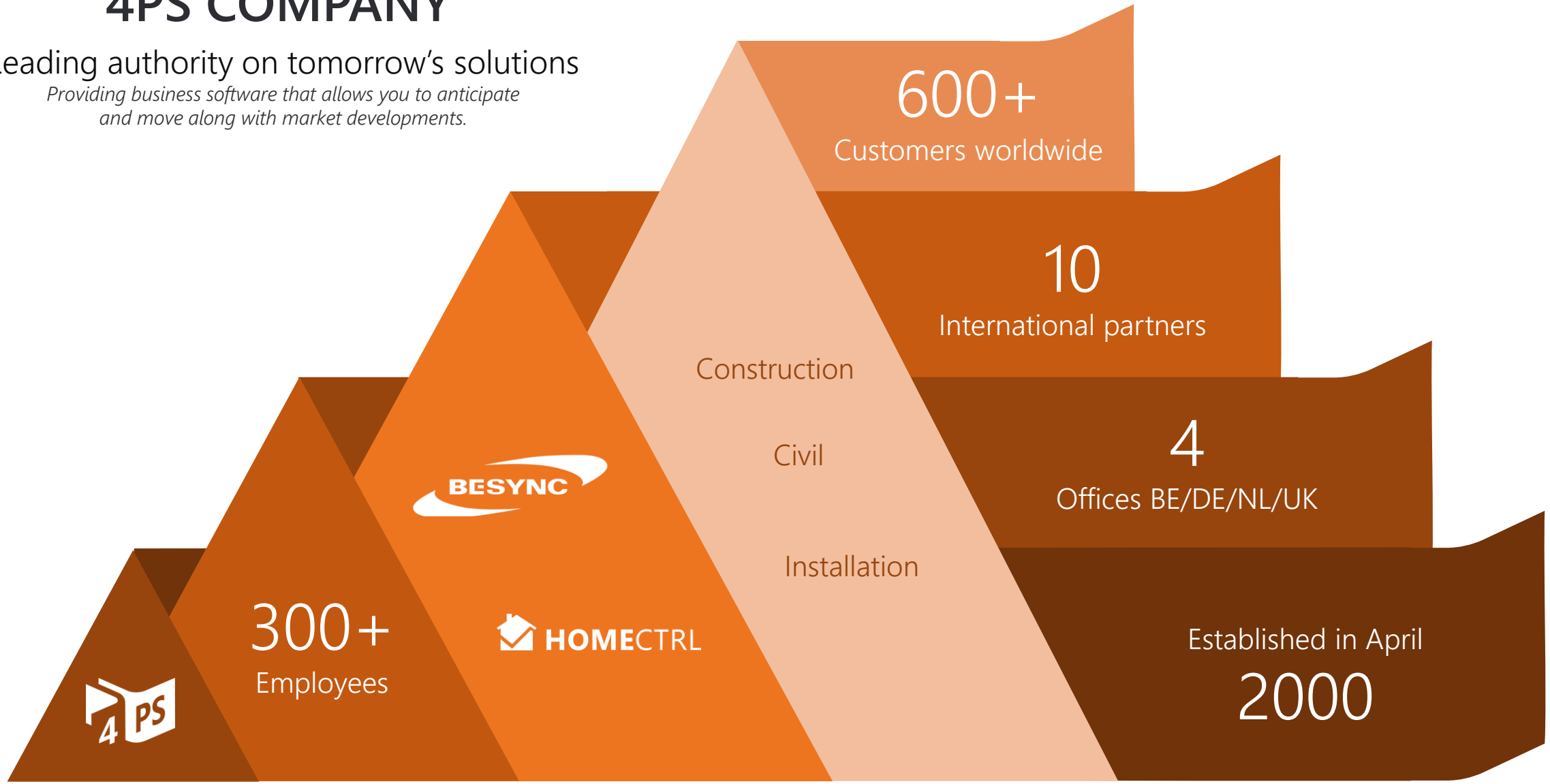
# 4PS COMPANY

## Leading authority on tomorrow's solutions

*Providing business software that allows you to anticipate and move along with market developments.*

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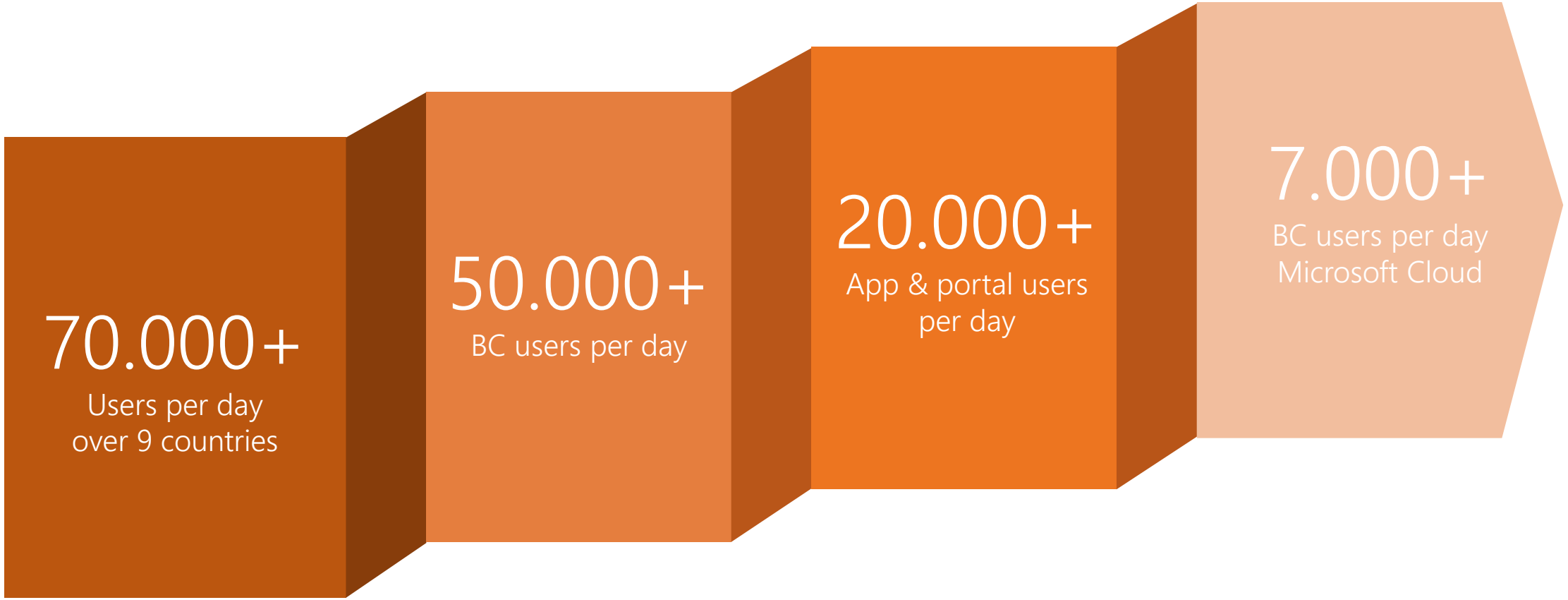
# 4PS CONSTRUCT – USER NUMBERS PRODUCT PORTFOLIO

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ONBOARDING

# WHAT DOES MICROSOFT OFFER FOR ONBOARDING?

ONBOARDING

## USE AUTOMATION APIS TO PREPARE ENVIRONMENTS

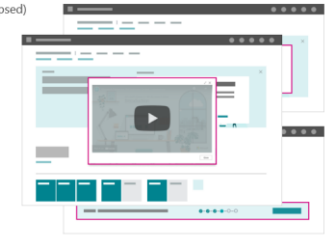
- Automate things like
  - Create a company
  - Upload and apply RapidStart packages
  - Manage users (including O365 sync), user groups and permission sets
  - Handle tenant extensions

```
POST https://api.businesscentral.dynamics.com/v2.0/production/api/
microsoft/automation/v2.0/companies({companyId})/automationCompanies
Authorization: Bearer {token}
Content-type: application/json
{
    "name": "CompanyA",
    "displayName": "Company A"
}
```

ONBOARDING

## LET CUSTOMERS SELF-SERVE WITH CHECKLISTS INCL. VIDEO

- Show a list of things to do (expanded or collapsed)
  - Assisted and manual setup
  - (Spotlight) tours / application features
  - URLs
  - Video

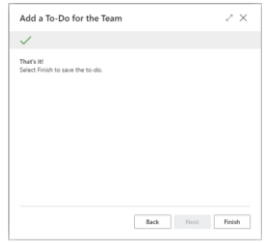


Graphics from https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/administration/onboarding-checklist

ONBOARDING

## USE ASSISTED SETUPS AND JUST-IN-TIME/-ENOUGH SETUP

- Assist users with setups (wizards)
- Only set up areas that are needed
- Only set up things as far as they are needed, step by step




Graphics from https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/developer/devenv-designing-navigate-pages

ONBOARDING

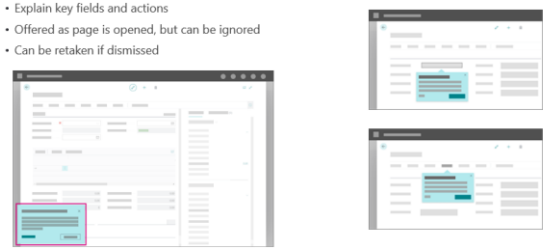
## PRELOAD CONFIGURATIONS AND LET THE CUSTOMER SELECT

- Create and upload configuration packages
  - automation API!
- Content e.g.
  - General ledger and posting setup
  - VAT setup
  - Sales and Receivables Setup
  - Inventory Setup
  - Key ISV configuration setup
- Offer them through checklists
- Let the customer self-apply

ONBOARDING

## USE TEACHING TIPS

- Explain key fields and actions
- Offered as page is opened, but can be ignored
- Can be retaken if dismissed

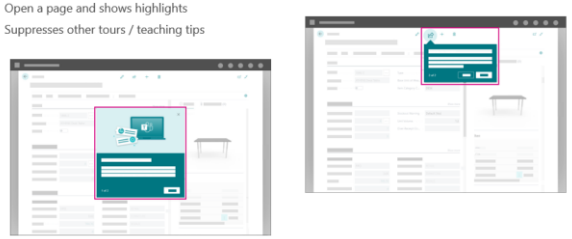


Graphics from https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/administration/onboarding-teaching-tips-tours

ONBOARDING

## SPOTLIGHT TOURS

- Open a page and shows highlights
- Suppresses other tours / teaching tips



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microsoft/automation/v2.0/companies({companyId})/automationCompanies
Authorization: Bearer {token}
Content-type: application/json
{
    "name": "CompanyA",
    "displayName": "Company A"
}
```

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ONBOARDING

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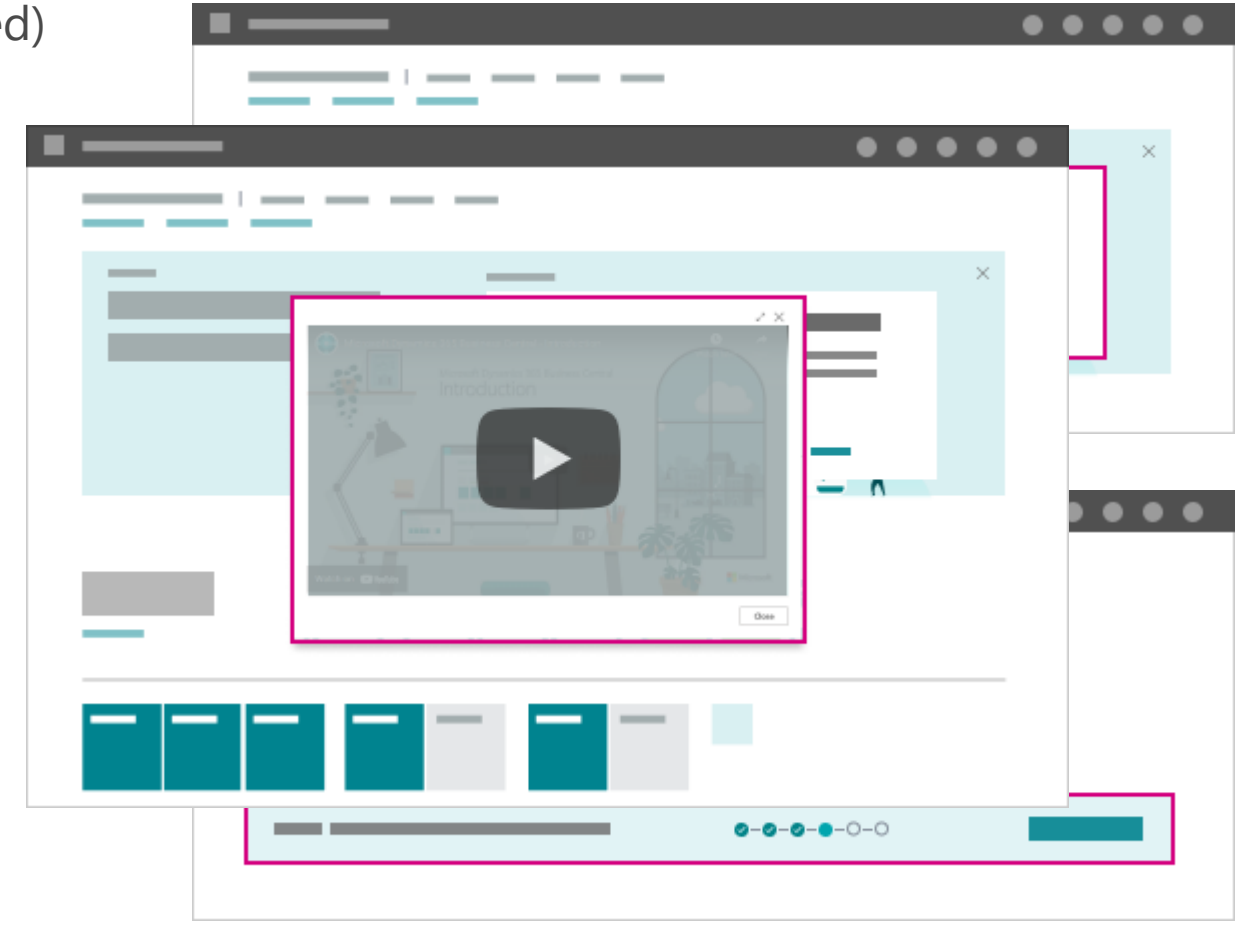

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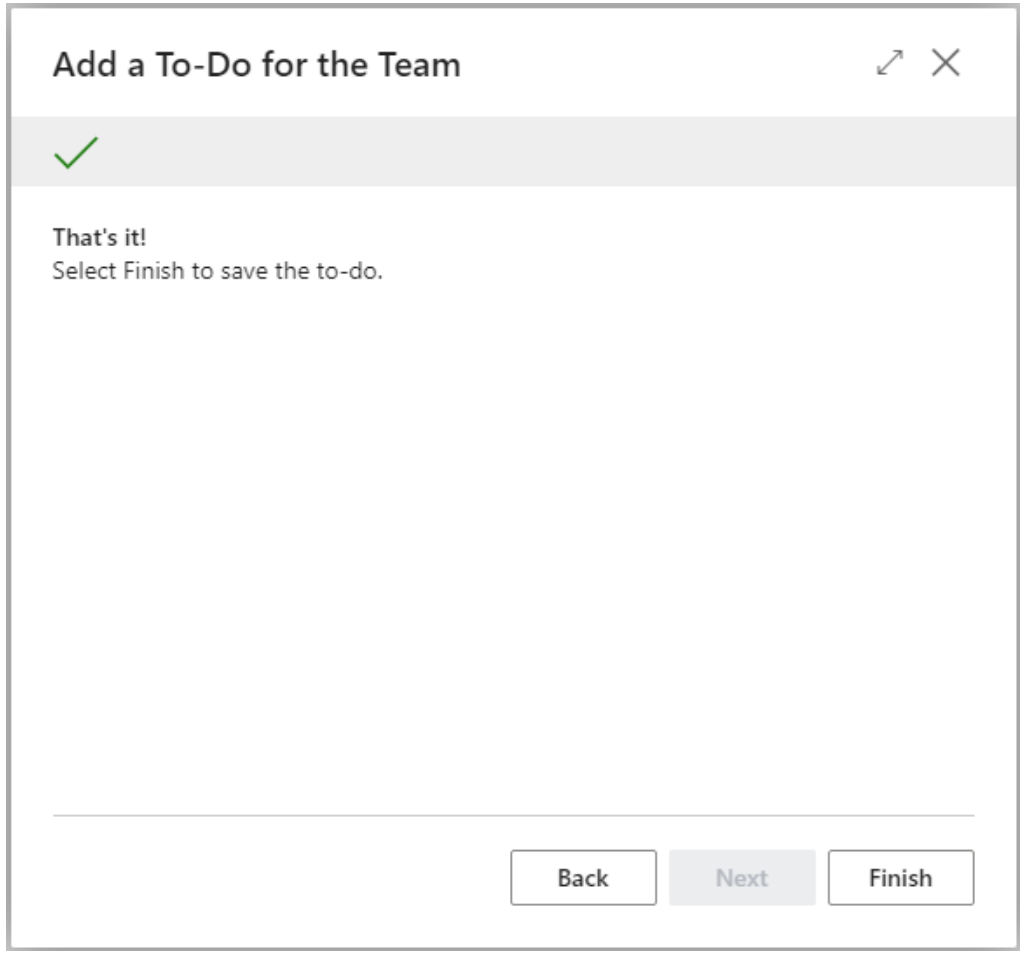


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ONBOARDING

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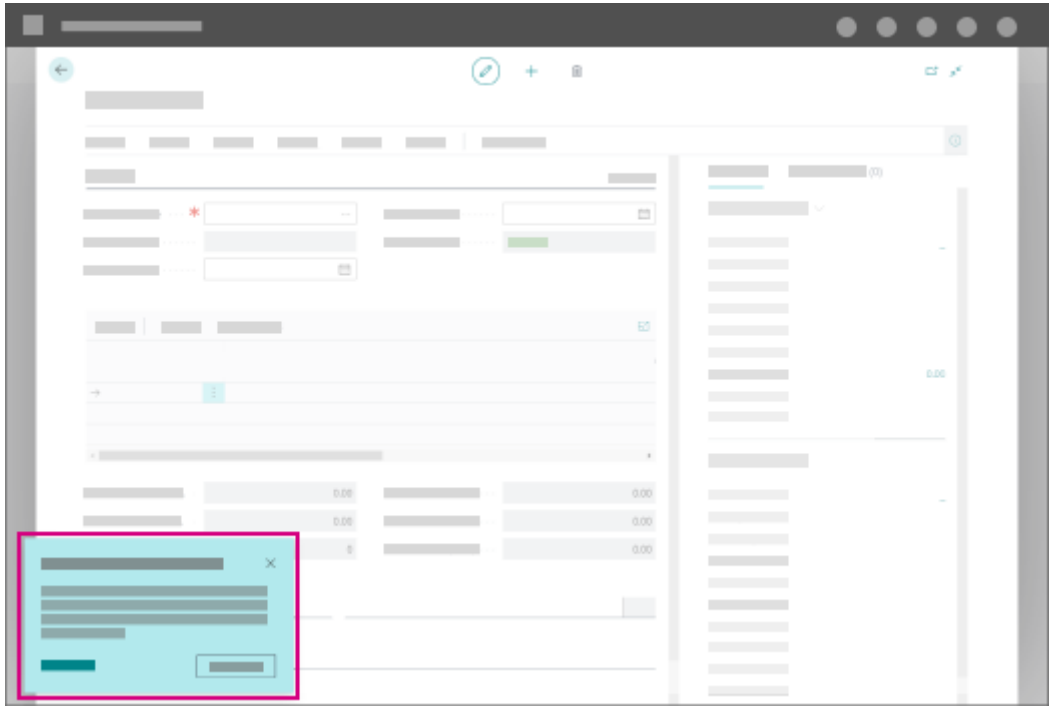

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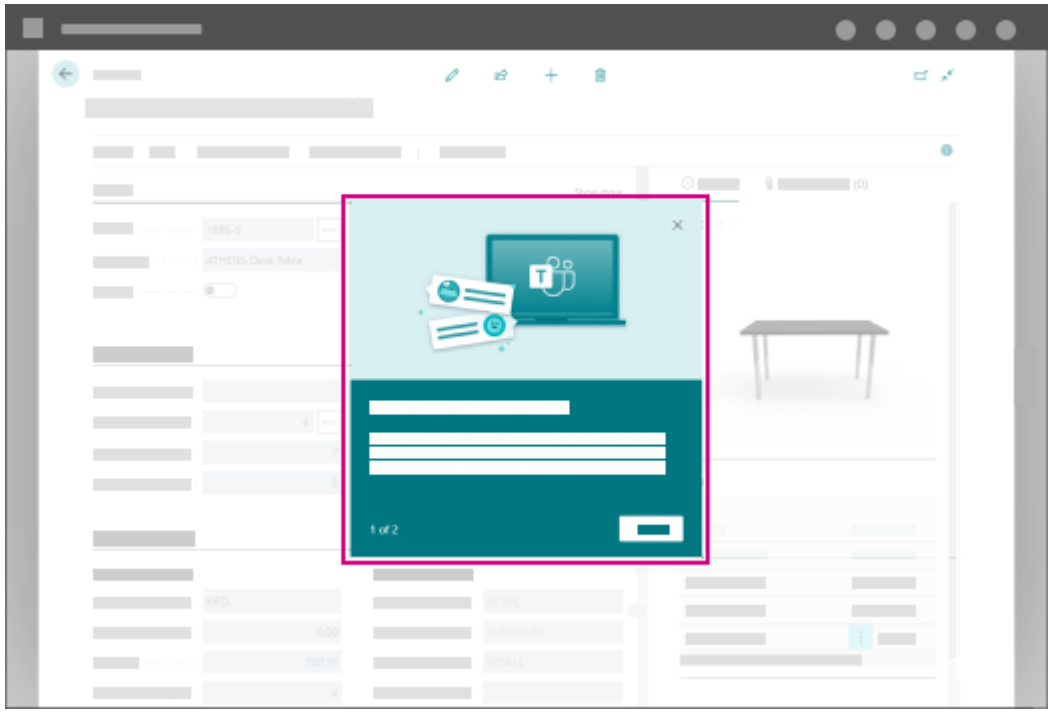


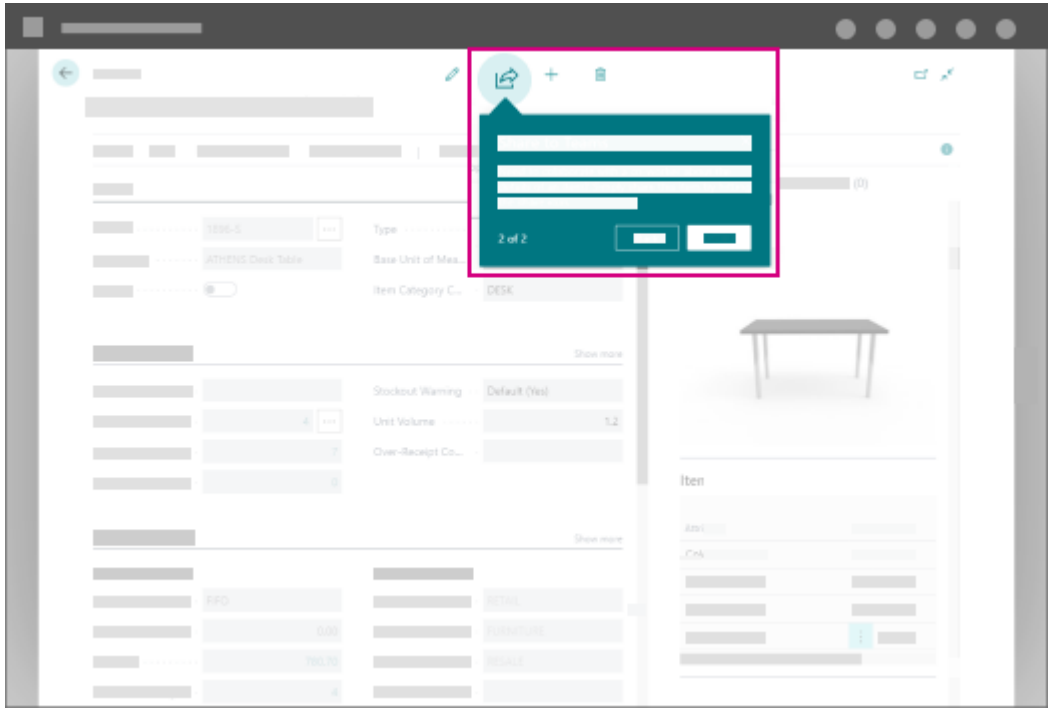


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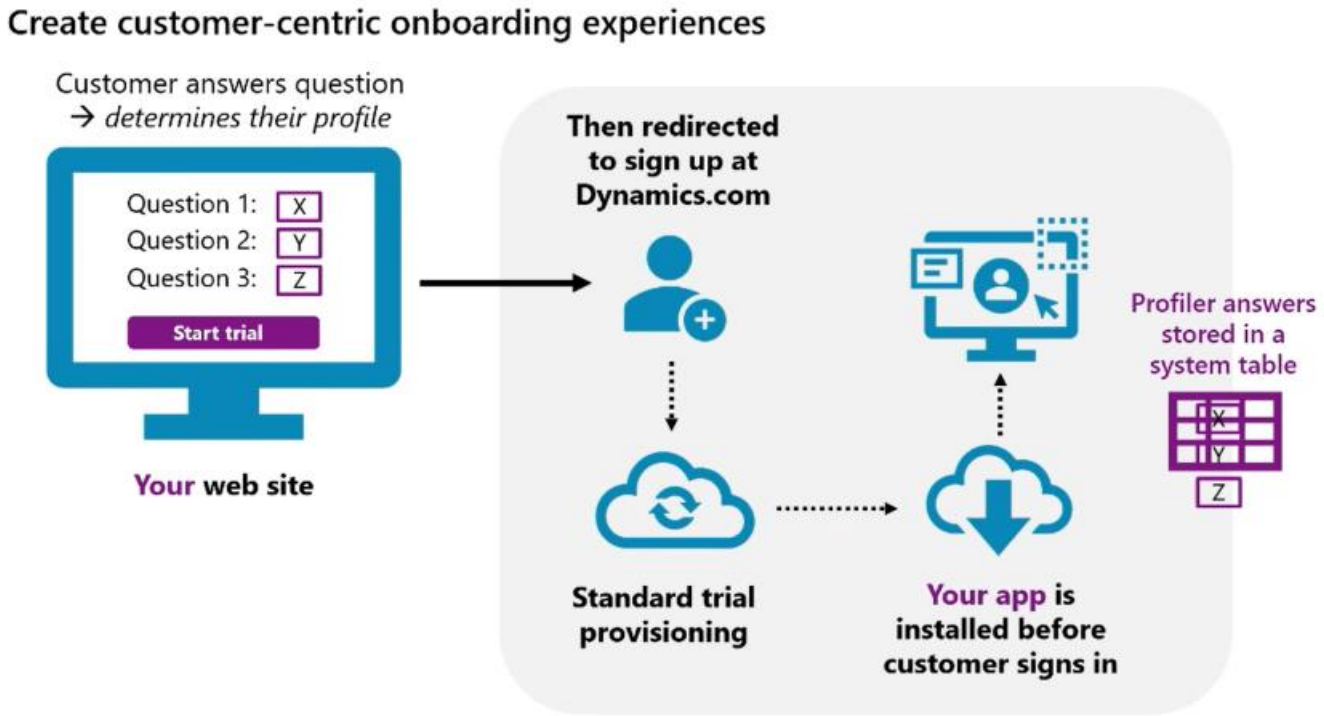
# GLIMPSE INTO WHAT'S NEW: TARGETED ONBOARDING

- Prequalify customer through questionnaire
  - On your own website!
- Go through regular onboarding
- ISV app preinstalled
- Questionnaire answers available
  - React how you see fit
- Relevant for "big" ISV apps defining big parts of the experience or for apps targeting the onboarding experience itself
- Also coming: Telemetry signals for onboardings, design change in 22.1 expected




Graphics from BC Office Hour, https://aka.ms/BCOfficeHours

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# WHERE COULD I BEGIN NOW?

The basic tooling for onboarding has come on stream, and will continue to evolve, but what could you start to do next week to add value for your users?

Start by asking yourself some questions:

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# WHAT KIND OF PARTNER ARE YOU?

Your onboarding strategy will vary depending on whether you're an ISV or VAR.

## ISV

You're a (horizontal) ISV, and your solution is essential for the customer to go live with BC.

It makes sense that the ISV leads the trial and onboarding to go-live.

- Ripe for opportunity and has strong use cases in theory.
- However, may find that options for more complex scenarios are limited for now.

## Reseller

Build an onboarding app that takes users through setting up standard BC plus a few add-ons.

This app does the work of a consultant who would normally spend a few hours setting up the basics.

- Less is more: Think carefully before you dive in and set a precedent!
- Look for common, repeatable processes where some user guidance will reduce consultant or support time.

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# DO YOU HAVE APPS ALREADY LISTED ON APPSOURCE?

Already being on AppSource gets you several steps up the ladder right away.

- You can offer a self-drive trial where a prospect can sign themselves up through your own website and discover your product.
- You can specify a default setup page (checklist) to launch automatically when the app is installed.

But even if you're not on AppSource, you can still benefit from onboarding functionality.

- Checklists, assisted setups, spotlight tours and guided tours are all available to you.
- If your app has few dependencies on other apps, getting started will be easier.

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# DO YOU WANT CUSTOMER-SPECIFIC CONTENT?

Customers appreciate bespoke documentation for their solution. However, this leaves you with a potential maintenance responsibility.

Same goes for onboarding content. You need to set healthy boundaries if you want to create bespoke onboarding content for a specific customer.

- There is currently no way for a customer to create or maintain onboarding content themselves.
- With bespoke onboarding content, you're straying from the main value proposition of onboarding, which is to enable **many customers**, and even **prospective customers**, to discover, set up and understand your **standard offering quickly and at scale**.

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# WHO WILL DO THIS WORK?

The best creators of onboarding content know the use cases of your solution in the real world.

Use cases can be for first-time setup and implementation, and for day-to-day operations.

Who fits the bill best for the above knowledge? Most likely **Functional Consultants**.

- If you have Functional Consultants, it's likely you deliver services, and want maximum **chargeability**.
- It is an **investment** for Functional Consultants to spend time creating new, standard onboarding content that will improve user experience at scale, and that's ok.
- Watch out! You'll need to **maintain** onboarding content as you change and expand your application. That initial investment will become a non-chargeable burden if you're not selective about what really adds value.

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# START WITH WHY

Before you add anything in the field of onboarding, ask why you're taking this on in the first place.

Let's consider some possible "whys" that will help you decide if onboarding will help you now.

Their relevance depends on whether you're:

- An ISV that (mostly) builds standard product for a target market, or
- A reseller that (mostly) implements a mix of BC, ISV solutions, and customisations.

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# THE WHYS FOR ISVS

**Why do I want prospects to self-provision my AppSource-listed app in a BC Cloud tenant, without first contacting me and even talking about a CSP relationship?**

Because I have already taken a productised app to market, which clearly solves a specific business problem.

I have enough confidence that my app is easy to understand and discover that I'm willing open it up for unsupervised trials, to reach more prospects and convert them faster.

There's some new onboarding telemetry from BC22.1 onwards, based on these events:

- A user starts onboarding in a company
- A user completes an onboarding criteria in a company
- A user completes onboarding in a company

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# THE WHYS FOR ISVS

**Why would I even consider onboarding capabilities, if my apps are on AppSource but are too complex/interdependent to offer self-provisioned trials via my website?**

Because I can already start adding value in small increments, from the bottom up.

Try a guided tour on one of your key pages, where users often need basic training/support to get started. It will take very little effort.

Then try a checklist for a basic initial setup, drilling down into one or more assisted setups.

As the icing on the cake, activate some feature telemetry on the specific area to see if people are clicking through, how quickly, etc.

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# THE WHYS FOR ISVS

**My product isn't even on AppSource (yet). Why shouldn't I wait until it is?**

Because you and/or your resellers can save on lower value consulting and support effort, by introducing relevant onboarding content within your application.

All onboarding capabilities, **except** for the ones listed below, are available to you as an ISV even if not on AppSource:

- Self-drive trials
- Auto-launched setup pages per app (but you can still launch a setup page from Feature Mgt)

Again, try something simple from the bottom up.

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# THE WHYS FOR RESELLERS

## Why don’t I just leave it to ISVs to do this?

You could, and often you’ll need to, but you can also create:

- An onboarding app to accelerate mostly standard BC implementation
- Some onboarding content for per-tenant extensions

Just be very careful to limit it to scenarios that you encounter often. It’s not the true use case intended for onboarding experiences.

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# THE WHYS FOR RESELLERS

**Why would I let end users run Assisted Setups, guided from top-level checklists, when I could charge for a consultant to do this per-customer?**

Scale and ownership.

**Scale** will benefit you when multiple customers need repeatable, predictable setup done all at the same time, and you haven't got enough consultants to meet the spike in demand.

**Ownership** will benefit you when you empower experienced people at your customers to do the initial setup, if you mostly need to ask them what setup they require anyway.

If those users know best, let them do it.

Use the time saved to offer higher value advisory consulting instead.

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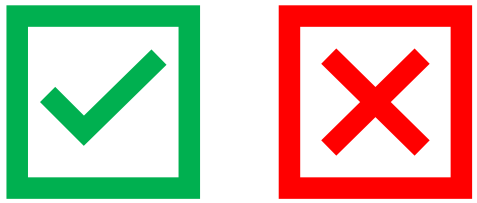
# USE CASES: OPPORTUNITIES AND CHALLENGES

Here are some real-world scenarios that show what is and isn't possible with onboarding now.

Use them to discover the scope of what you can do today.

Follow Microsoft's content and thought leadership for onboarding to identify how you can expand your offering in the (near) future.



Useful resources:

Onboarding experiences - Business Central | Microsoft Learn

BC Ideas

Yammer – BC Development

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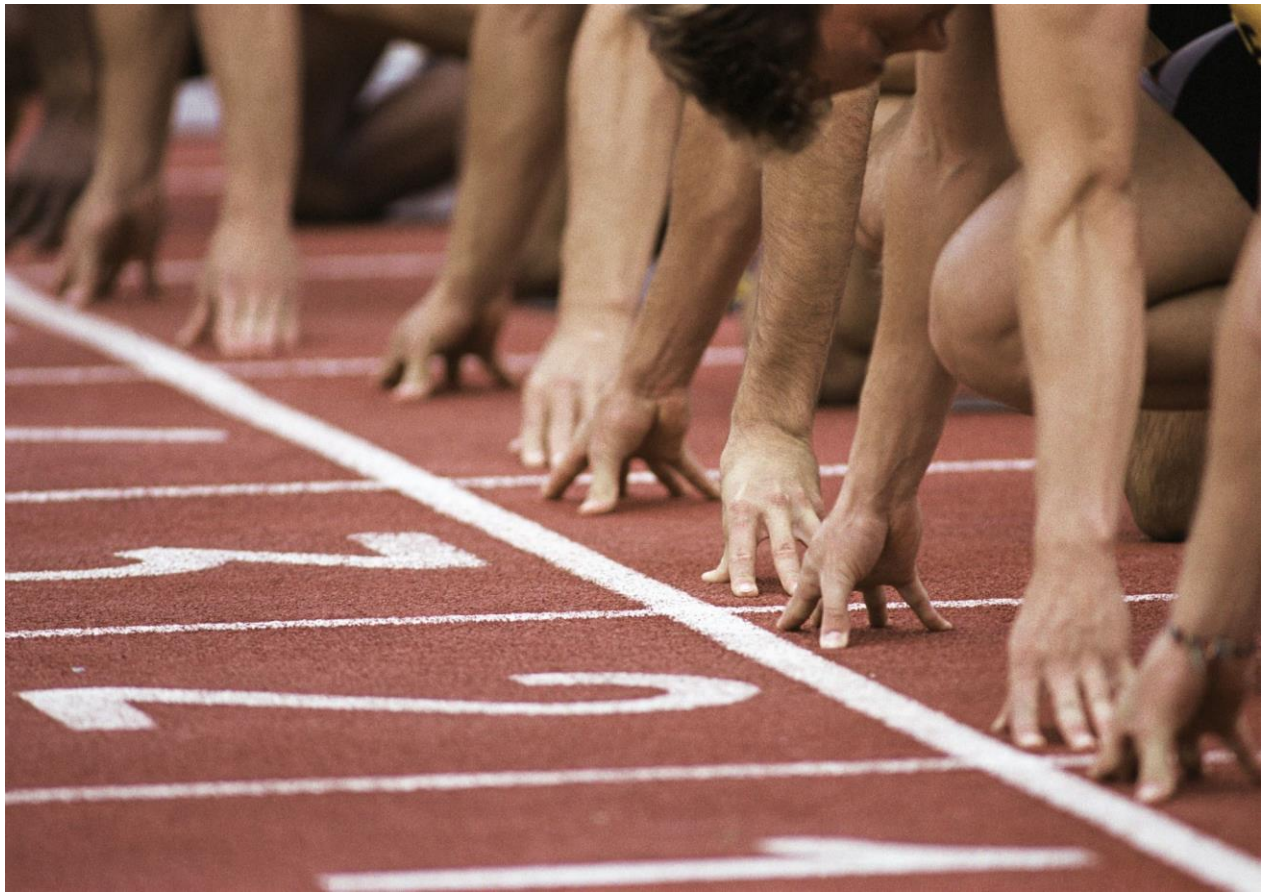
# BANNERS, CHECKLISTS, ASSISTED SETUPS, SPOTLIGHT TOURS

When a new user is opening a company (role centre) to get started, or you're implementing BC…



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# NEW USER, 1ST TIME IN COMPANY, USER SETUP

**Example user story:**

As a newly hired Finance Administrator,

I need a welcome message to set context and point me to a personalised setup action,

So that I can understand where I'm starting in the application and tailor some personal settings without needing someone to help me find those settings.

**Relevant onboarding solution:**

Welcome banner in the relevant company, with option to launch an Application Feature (a Page).

**Tip:**

From the banner you can launch a checklist, in turn launching

Assisted Setups or enabling the user to go straight to a specific setup page.

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# NEW IMPLEMENTATION, ADMIN USER, BASE SETUP NEEDED

**Example user story:**

As IT Manager in a business that is implementing Business Central,

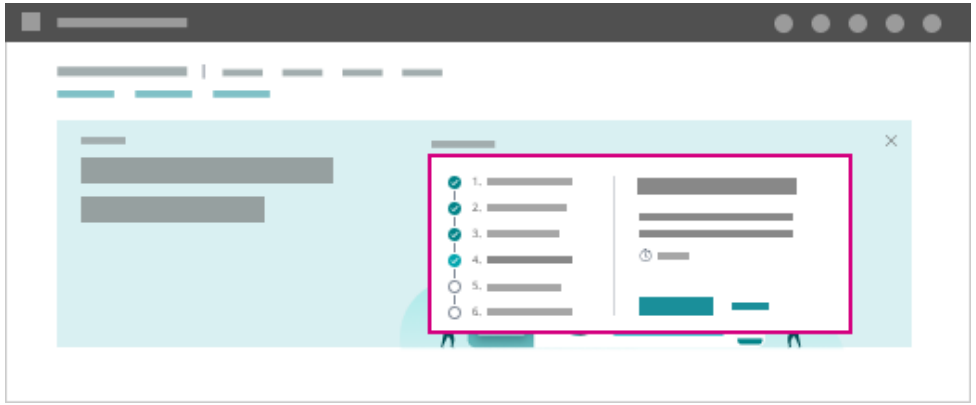
I need a checklist and related assisted setups to guide me through some base application setup,

So that I can ensure I have covered all essential setups before using the product.

**Relevant onboarding solution:**

Checklist from banner in Role Centre, leading to Assisted Setups.

Based on user choices in Assisted Setups, you can download additional modular Configuration Packages to complete the setup.



**Tip:**

From the banner you can launch a checklist, in turn launching assisted setups, or enable the user to go straight to a specific setup page.

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# NEW FEATURE, EXPERIENCED USER, INTRO NEEDED

**Example user story:**

As an experienced user of Business Central,

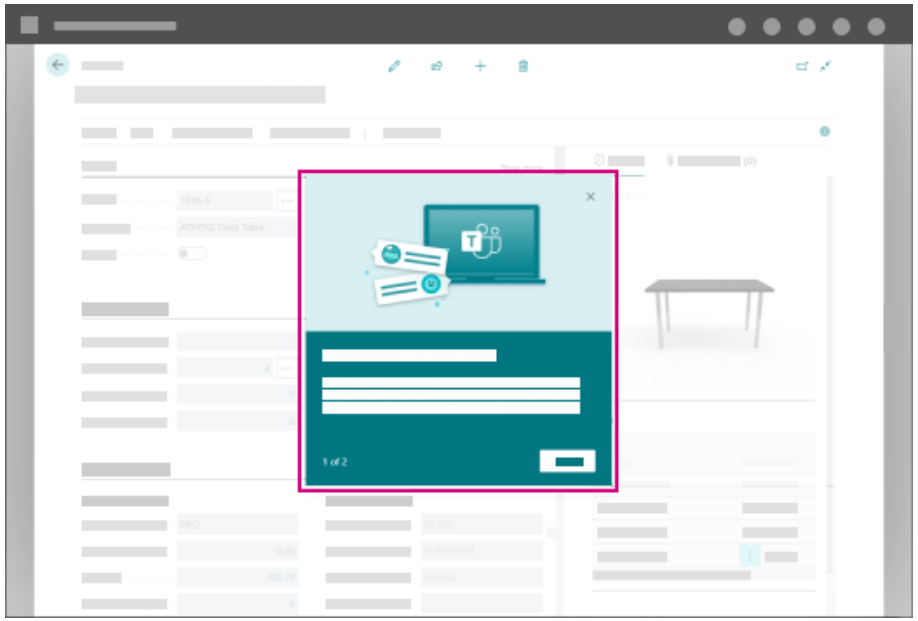
I need a high-level intro to a new major feature,

So that I can quickly understand the purpose, scope and location of the new feature.

**Relevant onboarding solution:**

Welcome banner leading to embedded video.

Option to launch a spotlight tour that opens the relevant pages in a special spotlight view, flagging key points of interest on the pages.



**Tip:**

As an alternative to a video embedded in the application, you can have a link to an external URL for your own online learning content.

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# GUIDED TOURS, CONTAINING TEACHING TIPS

When users need embedded guidance while working within the application…

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# SINGLE USER OR ROLE, SINGLE PAGE, SINGLE PROCESS

**Example user story:**

As a newly hired Accounts Payable Administrator in a small business,

I need guidance on creating a Purchase Order directly in the PO Card,

So that I can purchase existing items from an existing vendor.

**Relevant onboarding solution:**

Guided tour containing teaching tips within the Purchase Order Card.

**Tips:**

Don’t have more than 5-6 teaching tips in a guided tour. Focus on essential fields and actions.

You can choose whether specific roles or users see a tour (but not a mix of both).

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# MULTIPLE DIFFERENT ROLES, SINGLE PAGE, SINGLE PROCESS

**Example user story:**

As a newly hired Accounts Payable Administrator **OR** Financial Controller in a small business,

I need guidance on creating a Purchase Order directly in the PO Card,

So that I can purchase items directly, within my purchasing limits, from an approved vendor.

**Relevant onboarding solution:**

Guided tour containing teaching tips within the Purchase Order Card.

**Tip:**

After users dismiss a teaching tip and tour, they can choose or hover over the page title. This action will reopen the teaching tip, and the user can retake the tour.

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# SINGLE USER OR ROLE, MULTIPLE PAGES, SINGLE PROCESS

**Example user story:**

As a newly hired Accounts Payable Administrator in a small business,

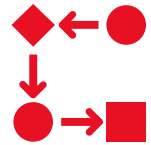
I need guidance on a single process for preparing a new item **AND** raising a first PO for that item,

So that I can make a first order of a new item directly, within my purchasing limits, from an approved vendor.

**Why not?**

A single guided tour can only exist within the scope of a single page.

A guided tour can't span multiple pages.



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# SINGLE USER OR ROLE, SINGLE PAGE, MULTIPLE PROCESSES

**Example user story:**

As a newly hired Accounts Payable Team Lead in a small business,

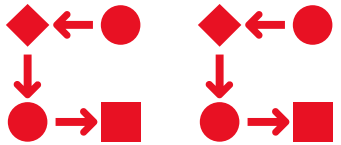
I need guidance both on creating my own new POs **AND** finalising other team members' POs in the PO Card,

So that I can order items AND ensure that my team are raising compliant POs.

**Why not?**

A given page can only have one guided tour.

If different processes are performed within the same page, you can't have multiple guided tours for different processes within that page.



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# THE ISSUE WITH TEACHING TIPS / TOURS

- Who is good at writing teaching tips / tours?
  - Functional consultants
  - Product managers
  - Technical writers
- Who is not so good at writing teaching tips / tours?
  - Developers
- Who can create teaching tips tours?
  - Developers

Meme source: https://giphy.com/gifs/Friends-season-1-friends-tv-WpaVhEcp3Qo2TjwyI1

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# BETTER AUTHORING FOR TEACHING TIPS / TOURS

use

DEMO

AL

script

script

AL

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# BETTER AUTHORING FOR TEACHING TIPS / TOURS

- Result: Extension with only teaching tips

```
pageextension 50103 "About Job Invoices" extends "Job Invoices"
{
    AboutTitle = 'All work ...';
    AboutText = 'All work and no play makes Jack a dull boy.';

    layout
    {
        modify("Document Type")
        {
            AboutTitle = 'All work ...';
            AboutText = 'All work and no play makes Jack a dull boy.';
        }

        modify("Line No.")
        {
            AboutTitle = 'All work ...';
            AboutText = 'All work and no play makes Jack a dull boy.';
        }

        modify("Quantity Transferred")
        {
            AboutTitle = 'All work ...';
            AboutText = 'All work and no play makes Jack a dull boy.';
        }
```

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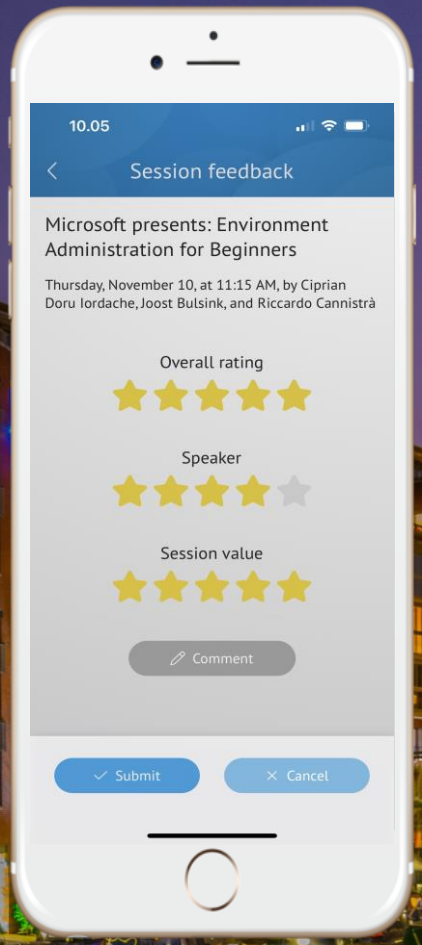
# BETTER AUTHORING FOR TEACHING TIPS / TOURS

- Currently evaluated internally at 4PS
- Ideas for the future
  - Let customers and partners create their own tours to extend or replace ours
  - Get the sources directly from a configurable Azure DevOps repository
  - Export directly to the AL code instead of an additional extension
  - Keep a separate extension but show in VS Code
  - Have multiple dedicated “What’s new tours” extension for subverticals
  - …
- Hopefully, Microsoft improves the story as well

DIRECTIONS 4 PARTNERS

# Thank you !

Please rate the session in the Conference App !

What questions can we answer?