



ONBOARDING THE WAY TO GO

Speaker's intro

- Bert Verbeek
- 16 jaar ervaring met NAV/BC in verschillende rollen
- Technical Solution Architect @ 4PS NL
- Microsoft MVP – Business Applications
- Twitter en LinkedIn: bertverbeek
- Blog: bertverbeek.nl



AGENDA

- Wat is onboarding?
- Wat houdt onboarding in?
- Waar te beginnen?
- Ervaringen delen

ONBOARDING THE WAY TO GO

WAT IS ONBOARDING?

- Klanten kunnen zelf zoeken, onderzoeken en starten met Business Central
- Gebruikers doen zelf hun setup
- Gebruikers leren onderweg
- Schaling

ONBOARDING THE WAY TO GO

AUTOMATION API

- Beheer omgevingen
 - Bedrijven aanmaken
 - Uploaden en toepassen rapid start
 - Beheer gebruikers, gebruikersgroepen en permissiesets
 - Beheer PTE extensions

[Introduction to automation APIs - Business Central | Microsoft Learn](#)

```
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 THE WAY TO GO

LADEN VAN INSTELLINGEN

- Via automation API
- Laat gebruikers zelf kiezen

ONBOARDING THE WAY TO GO

CHECKLIST INCL. VIDEOS

- Lijst met taken die je kunnen helpen
 - Assisted en handmatige instellingen
 - (Spotlight) tours / application features
 - URLs
 - Video

- Telemetry

[User Checklist Trace Telemetry - Business Central | Microsoft Learn](#)



NIEUWE USER, 1^E KEER IN BEDRIJF, 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.



ONBOARDING

✓ NIEUWE FEATURE, GEVORDERDE GEBRUIKER, INTRO NODIG

Example user story:

As an experienced user of Business Central,

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

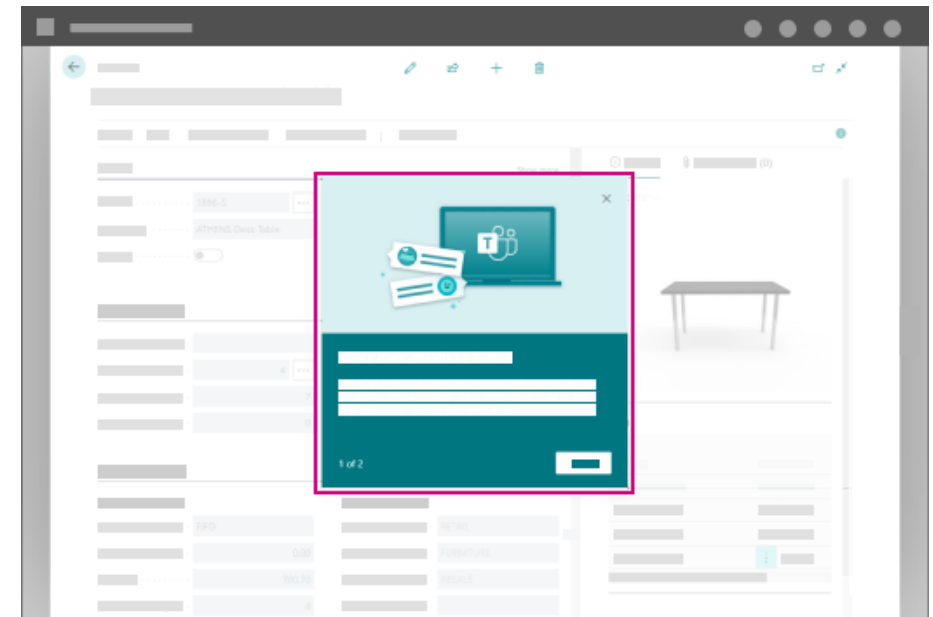
So that I can quickly understand the purpose, scope and location of the new feature.

Relevant onboarding solution:

Welcome banner leading to embedded video.

Tip:

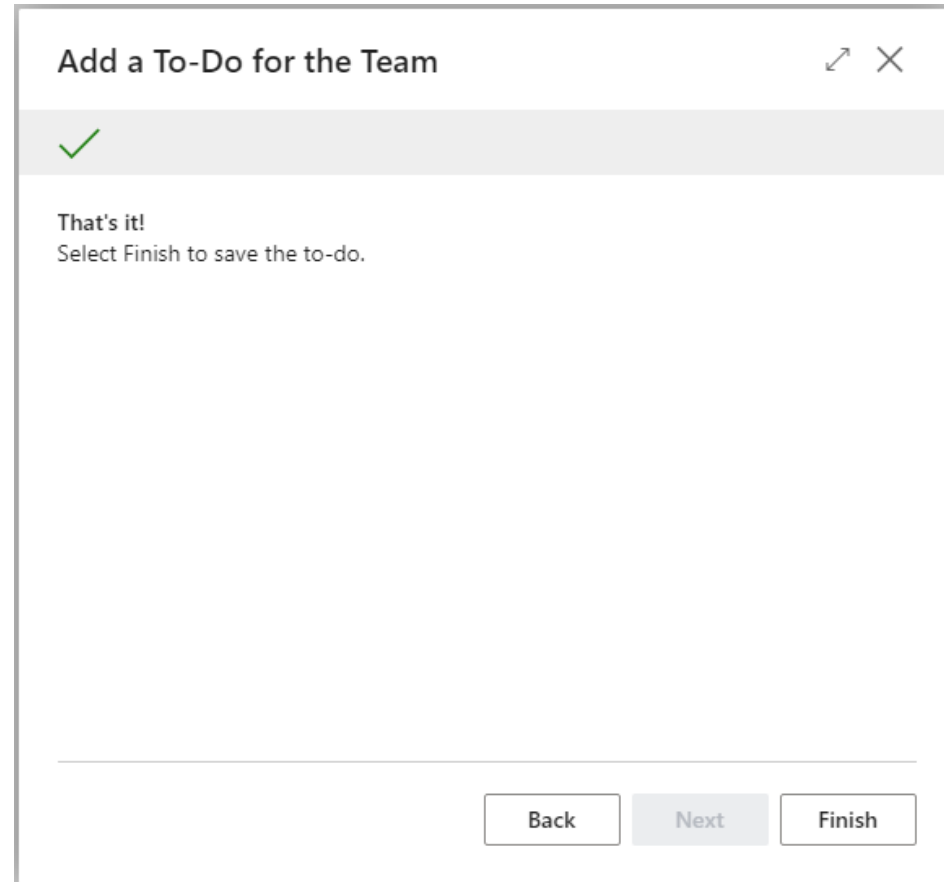
As an alternative to a video embedded in the application, you can have a link to an external URL for your own online learning content.



ONBOARDING THE WAY TO GO

ASSISTED SETUP

- Gebruikers een wizard laten volgen
- Bij het installeren van een extension



ONBOARDING THE WAY TO GO

TEACHING TIPS

- Uitleg van key velden en acties
- Als een page word geöpend
- Overnieuw starten
- Do's and don't:

[Teaching tips and in-app tours for onboarding users - Business Central | Microsoft Learn](#)



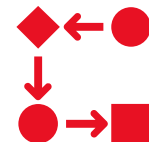
EEN GEBRUIKER, EEN PAGE, EEN PROCES

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.





MEERDERE ROLLEN, EEN PAGE, EEN PROCES

Example user story:

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

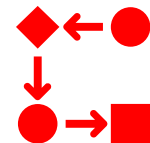
I need guidance on creating a Purchase Order directly in the PO Card,

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.





EEN GEBRUIKER, MEERDERE PAGE, EEN PROCES

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,

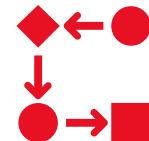
So that I can make a first order of a new item directly, within my purchasing limits, from an approved vendor.



Why not?

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

A guided tour can't span multiple pages.





EEN GEBRUIKER, EEN PAGE, MEERDERE PROCESSEN

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,

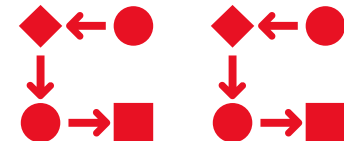
So that I can order items AND ensure that my team are raising compliant POs.



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.



HET PROBLEEM VAN TEACHING TIPS / TOURS

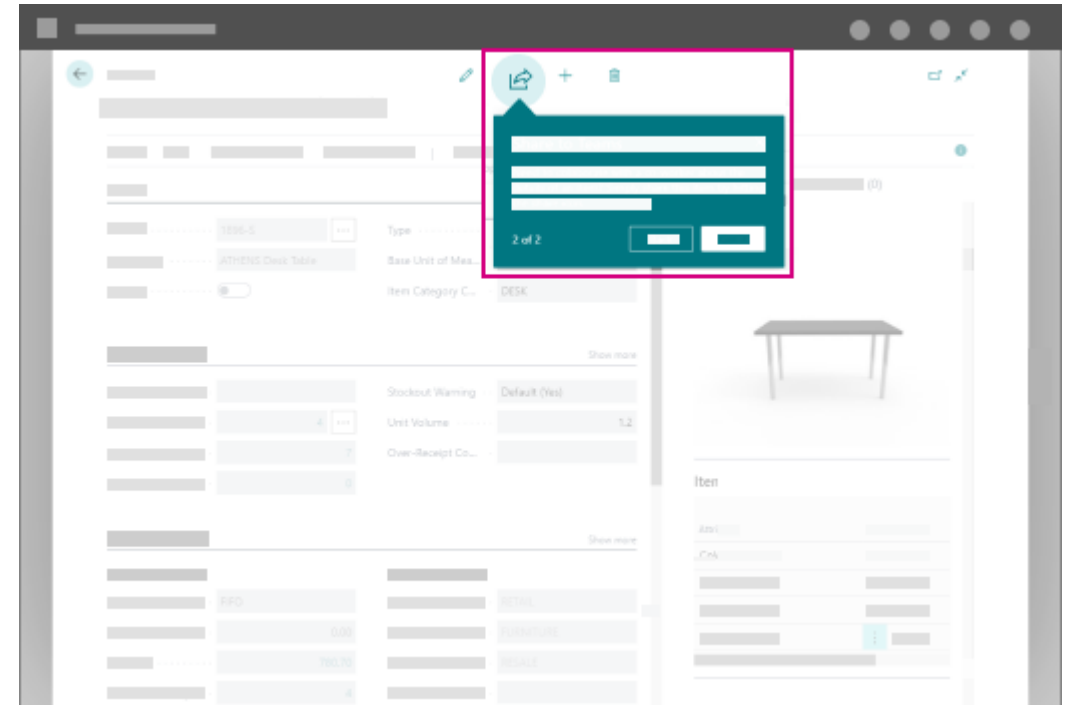
- Wie is goed in het schrijven van teaching tips?
 - Functional consultants
 - Product managers
 - Technical writers
- Wie is **niet** goed in het schrijven van teaching tips?
 - Developers
- Wie kunnen teaching tips schrijven?
 - Developers



ONBOARDING THE WAY TO GO

SPOTLIGHT TOURS

- Bij openen van een page
- Onderdrukt andere tours / teaching tips
- Niet echt extendable



ONBOARDING THE WAY TO GO

TARGETED ONBOARDING

- Klanten sturen naar juiste omgeving via vragen
 - Op je eigen website!
- Vervolgens via reguliere onboarding
- ISV app preinstalled
- Antwoorden beschikbaar
 - Je kan erop reageren
- Relevant voor grote ISV die grote inrichtingen bepalen of apps die de onboarding bepalen.

Create customer-centric onboarding experiences

Customer answers question
→ determines their profile



Then redirected
to sign up at
Dynamics.com



Standard trial
provisioning



Your app is
installed before
customer signs in

Profiler answers
stored in a
system table



ONBOARDING THE WAY TO GO

TARGETED ONBOARDING

Wat voor type bedrijf bent u?

- Handel
- Projecten
- Warehouse

Wat is uw huidige systeem?

- Geen
- Excel
- Quickbooks

Hoeveel gebruikers?

- 1-5
- 6-10
- 11-20
- 21-30

Start Business
Central Trial

Microsoft

You've selected Dynamics 365 Business Central

- 1 Let's get you started
Enter your work or school email address, we'll check if you need to create a new account for Dynamics 365 Business Central.
Email
By proceeding you acknowledge that if you use your organization's email, your organization may have rights to access and manage your data and account.
[Learn More](#)
[Next](#)
- 2 Create your account
- 3 Confirmation details

Connected business management

- Connect sales, service, finance, and operations in a single solution
- Edit and analyze your data in Excel
- Manage sales in Outlook and share data via Teams
- Extend your solution with industry-specific apps via AppSource

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TARGETED ONBOARDING

De URL

<https://signup.microsoft.com/get-started/signup?sku=6a4a1628-9b9a-424d-bed5-4118f0ede3fd&ru=https%3A%2F%2Fbusinesscentral.dynamics.com%2F%3FredirectedFromSignup%3D1%26Scenariold%3Dsignup%26signupContext%3D%257B%2522name%2522%253A%2522partnerx%2522%252C%2522appid%2522%253A%252212345678-1234-1234-1234-12456781234%2522%252C%2522countrycode%2522%253A%2522us%2522%252C%2522eulaaccept%2522%253A%2520%2522true%2522%2520%252C%2522presystem%2522%253A%2522Foo%2520Accounting%2522%257D&products=6a4a1628-9b9a-424d-bed5-4118f0ede3fd&ali=1>

ONBOARDING THE WAY TO

TARGETED ONBOARDING

De URL

<https://signup.microsoft.com/get-started/signup?sku=6a4a1628-9b9a-424d-bed5-4118f0ede3fd&ru=https%3A%2F%2Fbusinesscentral.dynamics.com%2F%3FredirectedFromSignup%3D1%26ScenarioId%3Dsignup%26signupContext%3D%257B%2522name%2522%253A%2522partnerx%2522%252C%2522appid%2522%253A%252212345678-1234-1234-1234-12456781234%2522%252C%2522countrycode%2522%253A%2522us%2522%252C%2522eulaaccept%2522%253A%2520%2522true%2522%2520%252C%2522presystem%2522%253A%2522Foo%2520Accounting%2522%257D&products=6a4a1628-9b9a-424d-bed5-4118f0ede3fd&ali=1>

Registeren/inloggen als een MS cloud klant en trial licentie toevoegen.

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De URL

https%3A%2F%2Fbusinesscentral.dynamics.com%2F%3FredirectedFromSignup%3D1%26ScenarioId%3Dsignup%26signupContext%3D%257B%2522name%2522%253A%2522partnerx%2522%252C%2522appid%2522%253A%252212345678-1234-1234-1234-12456781234%2522%252C%2522countrycode%2522%253A%2522us%2522%252C%2522eulaaccept%2522%253A%2520%2522true%2522%2520%252C%2522presystem%2522%253A%2522Foo%2520Accounting%2522%257D&products=6a4a1628-9b9a-424d-bed5-4118f0ede3fd&ali=1

<https://businesscentral.dynamics.com/?redirectedFromSignup=1&ScenarioId=signup>

Business Central product

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De URL

signupContext%3D%257B%2522name%2522%253A%2522partnerx%2522%252C%2522appid%2522%253A%252212345678-1234-1234-1234-12456781234%2522%252C%2522countrycode%2522%253A%2522us%2522%252C%2522eulaaccept%2522%253A%2520%2522true%2522%2520%252C%2522presystem%2522%253A%2522Foo%2520Accounting%2522%257D&products=6a4a1628-9b9a-424d-bed5-4118f0ede3fd&ali=1

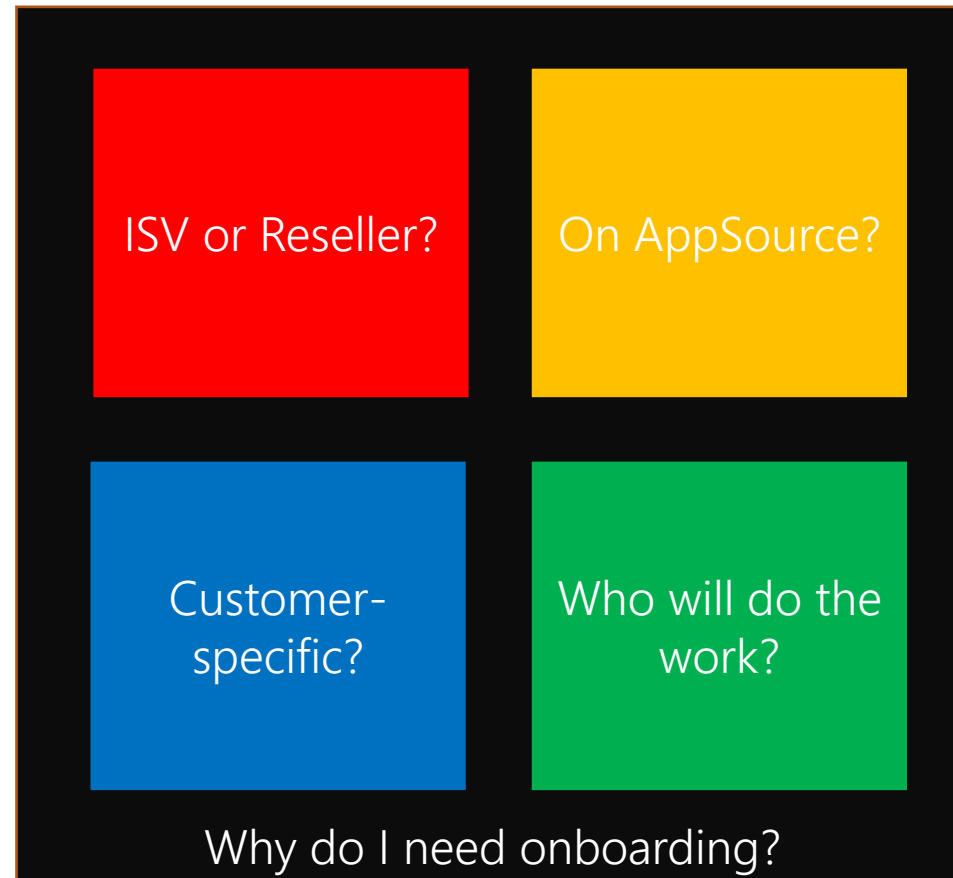
```
1  {
2    "name": "partnerx",
3    "appid": "12345678-1234-1234-1234-12456781234",
4    "countrycode": "us",
5    "eulaaccept": "true",
6    "presystem": "Foo Accounting"
7  }
```

ONBOARDING THE WAY TO

WAAR TE BEGINNEN?

De basistooling voor onboarding is beschikbaar en zal zich blijven ontwikkelen, maar wat kun je volgende week al doen om waarde toe te voegen voor je gebruikers?

Begin met jezelf een aantal vragen te stellen:



BEDANKT VOOR UW AANDACHT!



XX-XXXXXXX



BVERBEEK@4PS.NL



KEPLERLAAN 4, EDE

