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LEVERAGING MICROSOFT TOOLS IN AKOYAGO

PRESENTED BY
PAUL CZYWCZYNSKI

akoya**GO**

OVERVIEW

- Enable and use Teams chat within akoyaGO

- Use Microsoft Forms to add records to akoyaGO

- Bonus – Sending a text message (SMS)

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MICROSOFT TEAMS AND akoyaGO

Goal: Chat with colleagues within an akoyaGO record

- Turn on Microsoft Teams chats inside Dynamics 365

- Power Platform admin center > Settings > Integration > Teams integration settings

- Connect chats to Dynamics 365 records
  - Examples: Request and Payment or Requirement

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MICROSOFT TEAMS AND akoyaGO

- Connection settings
  - Join chat: Anyone with Write or Append access to a record can join its connected chats.

  - Auto-name chats: Use the record title to name connected chats. When off, the chat participants' first names will be used as the chat name.

  - Include a note: When someone starts a new connected chat, include an auto-populated note about the connected record to give chat participants context.

  - Message view (optional): Decide what information should show up as the first message in the chat.

  - Get notified of key updates (optional): You can set up which attributes related to the record that you want to monitor to receive updates on.
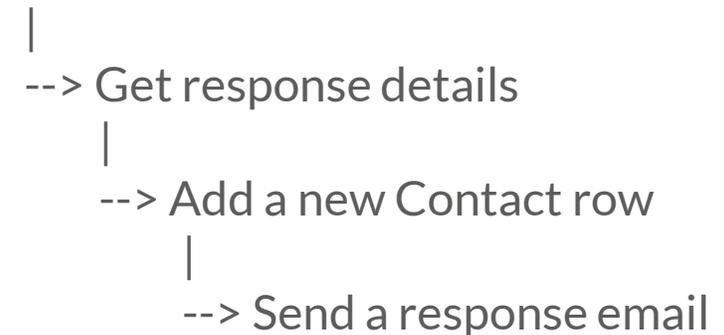
DEMO

MICROSOFT FORMS AND akoyaGO

Goal: Sign up form that creates a new contact and emails contact

- Create a new sign-up form at
  https://forms.office.com/

- On a form response, create a new contact record via Power Automate

- Create a Flow from Power Apps at
  https://make.powerapps.com/

When a new response is submitted
|
--> Get response details
|
--> Add a new Contact row
|
--> Send a response email

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DEMO

TEXTING (SMS) AND akoyaGO

Goal: Send a text message via a Power Automate Flow

- Many texting providers, like Azure Communication Services and Twilio, many others
  - Using Twilio, very easy trial to play with sending texts

- Create Twilio account
  - Verify email and phone number
  - Get your Twilio phone number and account info

- Add the Twilio Send Text Message step to your Power Automate Flow

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THANK YOU

Presented By

Paul Czywczynski
Chief Technology Officer

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