

Wiise – Microsoft Teams Integration

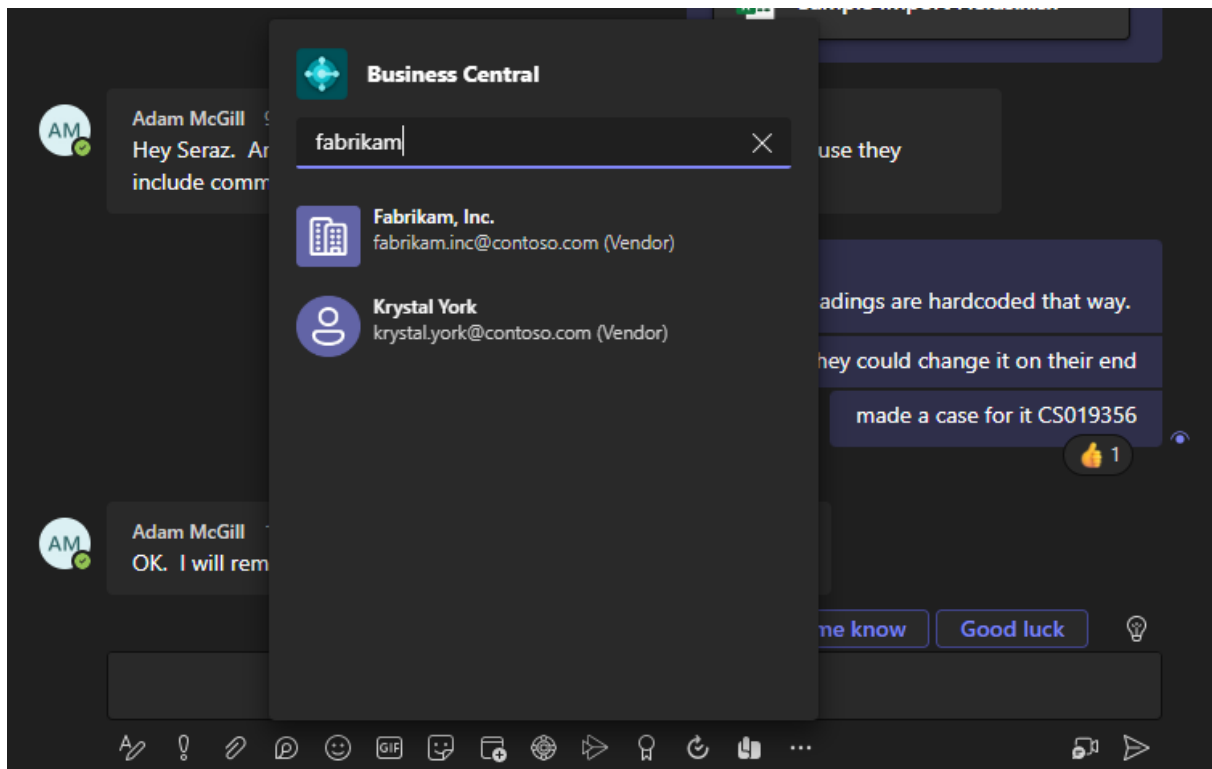
Overview

Microsoft Teams is a tool from the Microsoft 365 suite that facilitates seamless collaboration and communication among users. With the integration of the Wiise app, you can efficiently share information among team members, access contact information and respond promptly to inquiries. This app is accessible through the Teams marketplace and compatible with the Teams desktop, mobile app, and web.

Look up details of customers, vendors, and other contacts

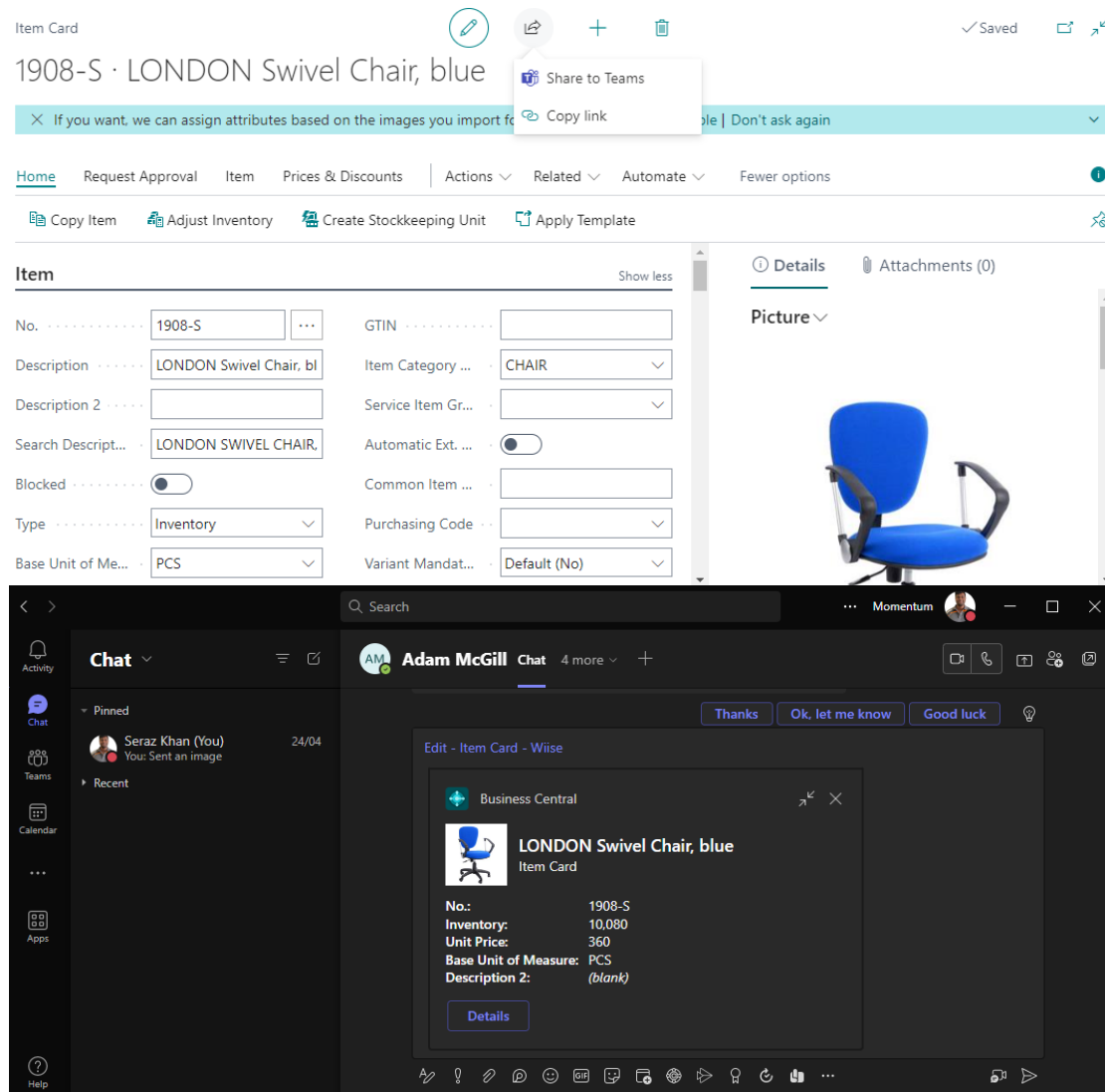
Regardless of your location within Teams, it's possible to retrieve information on customers, vendors, and other contacts in Wiise. This functionality not only provides an overview of their general information, but also allows access to interaction history, associated documents, and additional details.

Additionally, it's possible to share contact information within a conversation, which grants participants even greater access to details about the contact.



Share records in conversations

By copying a link to a Wise record and pasting it into a Teams conversation, you can effortlessly share it with your colleagues. The app will subsequently transform the link into a concise, interactive card that showcases information regarding the record.



The screenshot illustrates the workflow of sharing a record. In the top section, the 'Item Card' for '1908-S · LONDON Swivel Chair, blue' is shown. A context menu is open, highlighting the 'Share to Teams' option. Below this, the record's details are visible in a form layout:

Item		Show less	
No.	1908-S	GTIN	
Description	LONDON Swivel Chair, bl	Item Category	CHAIR
Description 2		Service Item Gr...	
Search Descript...	LONDON SWIVEL CHAIR,	Automatic Ext. ...	<input type="checkbox"/>
Blocked	<input type="checkbox"/>	Common Item ...	
Type	Inventory	Purchasing Code	
Base Unit of Me...	PCS	Variant Mandat...	Default (No)

The bottom section shows a Microsoft Teams chat window with a card titled 'Edit - Item Card - Wise'. The card displays the following information:

- Business Central**
- LONDON Swivel Chair, blue**
- Item Card
- No.: 1908-S
- Inventory: 10.080
- Unit Price: 360
- Base Unit of Measure: PCS
- Description 2: (blank)
- [Details](#)

Once the record is in the conversation, you and your coworkers can review additional information, modify data, and execute tasks, all without exiting Teams.

Share links from pages in Wiise to Teams

From various collection and detail pages within Wiise, you can utilize the "Share to Teams" function by clicking on the Share menu icon. This action allows you to compose a message, select recipients - such as team members, groups, or channels - and transmit the message with a link to the corresponding Wiise page.

Item Card

1960-S · ROME Guest Chair, green

Microsoft Teams | Microsoft Teams - Google Chrome

teams.microsoft.com/share?href=https%3A%2F%2Fwiise.bc.dynamics.com%2F24f6ffac-80f5-4c3c-a9aa-...

Share to Microsoft Teams

Share to

Test - Project > General

Say something about this

<https://wiise.bc.dynamics.com/24f6ffac-80f5-4c3c-a9aa-66bf9472524a/Production/?company=CRONUS%20AU&bookmark=23%3bGwAAAAJ7%2fzEAOQA2ADAALQBT&page=30>

Business Central

ROME Guest Chair, green
Item Card

No.:	1960-S
Inventory:	10,167
Unit Price:	365
Base Unit of Measure:	PCS
Description 2:	(blank)

Details

Share

on't ask again

Fewer options

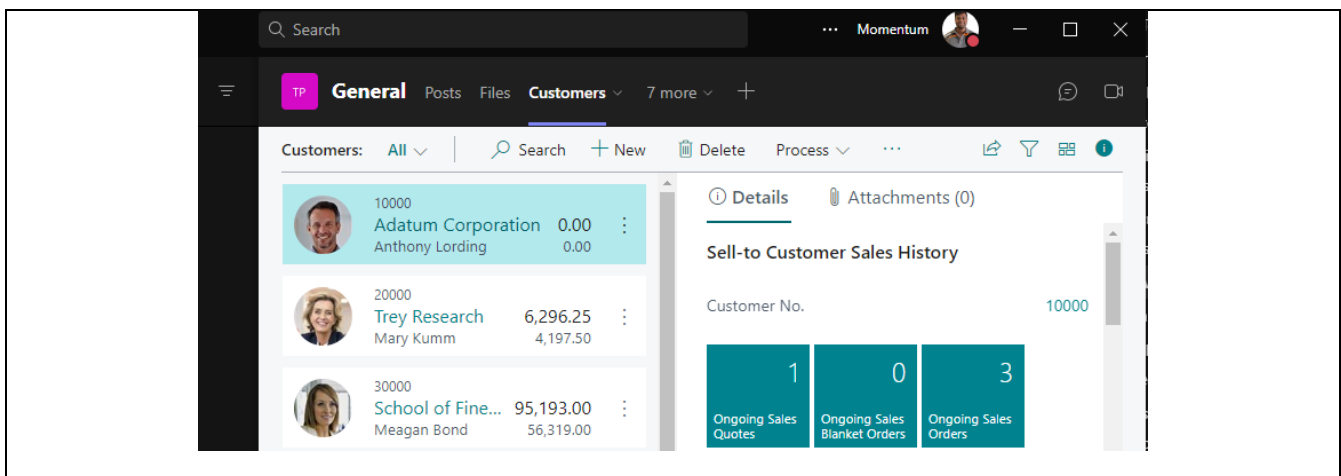
Details Attachments (0)

Picture

HTML Description

Add a Wiise tab to Teams channel or chat

With the Wiise app for Teams installed, you can add a tab in a channel or chat that shows Wiise data from lists and card pages.



Step 1 – Setup in Teams Admin Centre



1. To access the Wiise app for Teams, you must have an online user account for Wiise. If you are uncertain about having an account or don't remember your login credentials, it's recommended that you reach out to your company administrator for assistance in setting up your account.
2. As a Teams administrator, you have the ability to oversee all apps for your organization, including the Wiise app. This entails granting approval for or installing the Wiise app for your organization, preventing users from installing the app, and other related functions.
3. The Microsoft Teams admin center provides a means to configure Teams app setup policies for your organization. Within the Teams admin center, you can utilize the Centralized Deployment functionality to automatically install the Wiise app in Teams for all users in your organization, certain groups, or individual users.

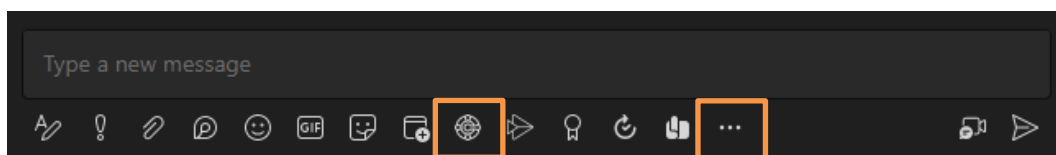
After a Momentum Consultant has set up your Wiise Environment to allow for Teams Integration,

- a. Open the Teams admin center and complete the following steps.
- b. Go to Teams apps > Setup policies.
- c. Create a new policy or select the policy that you want to use to install the Wiise app, then select Add apps.
- d. In the Add installed apps page, search for and select Wiise.
- e. Choose Add.
- f. Wiise should now appear under Installed apps for the policy.
- g. Configure more settings as needed, then choose Save.
- h. Go back to Teams App Centralised Deployment in Business Central and select Done.

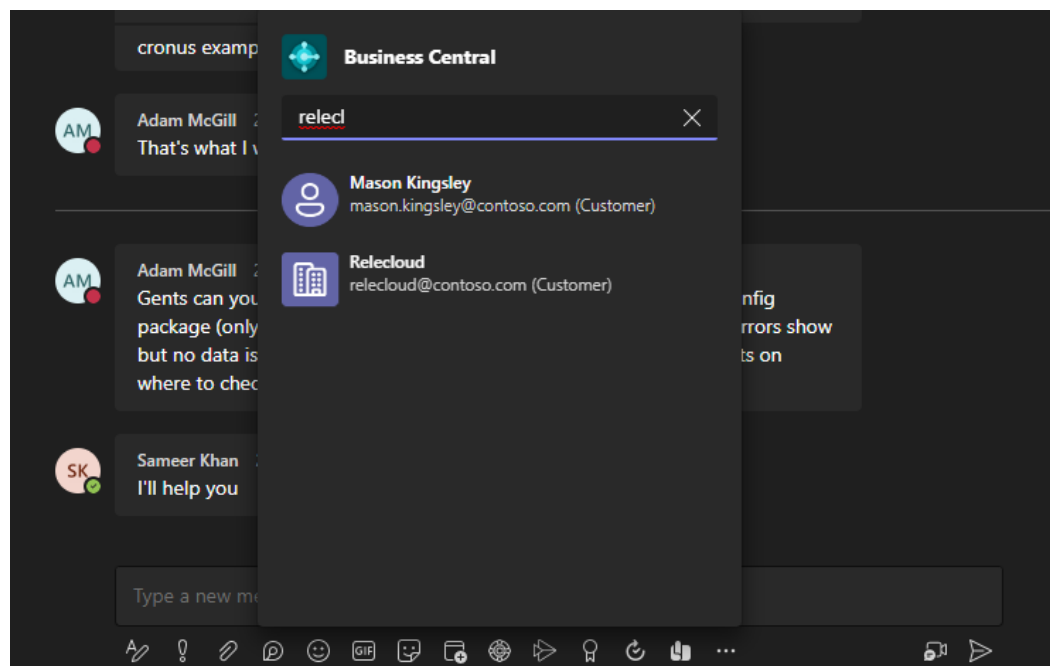
Step 2 - Look up contacts from the message compose box

By utilizing the message compose box, you have the ability to include a contact card directly in a conversation for others to view, which serves as a significant benefit.

1. Located underneath the message compose box, you should choose the Business Central icon  to launch the app. If the Business Central icon is not visible, select the  icon for Messaging extensions.



2. Within the Business Central box, begin entering search text, such as a name, address, or phone number. As you type, relevant results will appear in real-time.

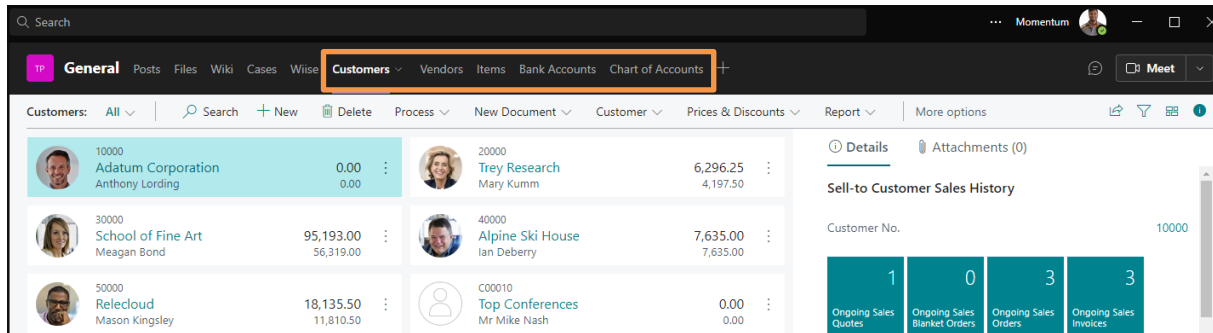


3. Once you have located the desired contact from the results, select it to display the corresponding contact card within the message compose box.

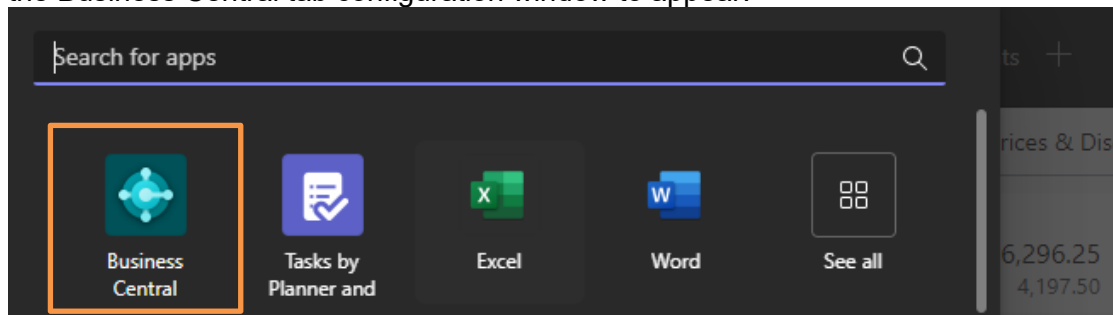
There is an alternate method that involves directly typing "@Business Central" within the message compose box, as opposed to selecting the Business Central icon. Following this, enter the desired search terms in the provided box. You can then use the up and down arrow keys on your keyboard to select a contact, and once chosen, press "Enter" to confirm your selection.

Step 3 – Add Wise Tab in Microsoft Teams

Within Teams, users are presented with tabs at the top of channels and chats that provide fast and convenient access to relevant information.



1. At the top of a channel or chat in Teams, select + Add a tab.
2. In the Search box, type business central, then select the Business Central icon and wait for the Business Central tab configuration window to appear.



3. The Choose from content recommended for option shows the company in Business Central that you working with. If you want to show content from another company, select the current company, then use the Environment and Company options to specify company you want to work with.

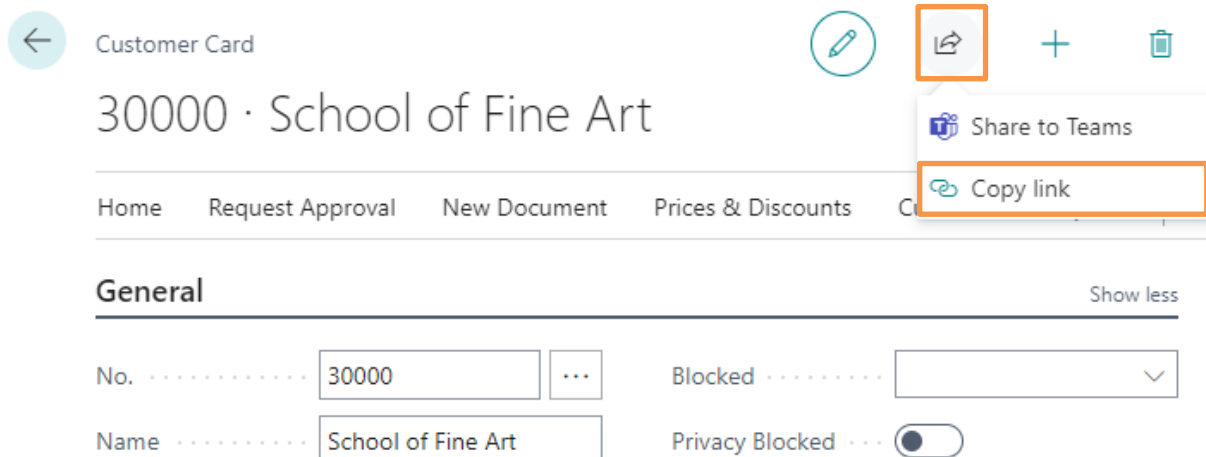
The screenshot shows a dark-themed dialog box titled "Business Central" with an "About" link and a close button. The main content area is titled "Choose from content recommended for:" and includes a dropdown menu for "CRONUS AU (Production)". Below this are two more dropdown menus: "Environment" (set to "Production") and "Company" (set to "CRONUS AU"). There are also two more dropdown menus: "Tab content" (set to "Customers") and "Preferred view" (set to "All"). Below these are links for "Learn about recommended content" and "Paste a Business Central link instead". A question "Who will be able to see the content of this tab?" is followed by a checked checkbox "Post to the channel about this tab". At the bottom are "Back" and "Save" buttons.

4. Select down arrow in the Tab content option and choose the content that you want to display.
5. Some pages may include different views, which are variations of the page that's filtered to show specific data. To change the view for the content, select the down arrow for the Preferred view option and choose the view from the list.
6. Select Post to the channel about this tab to automatically post an announcement in the Teams channel or chat to let participants know that you've added this tab.
7. Select Save.

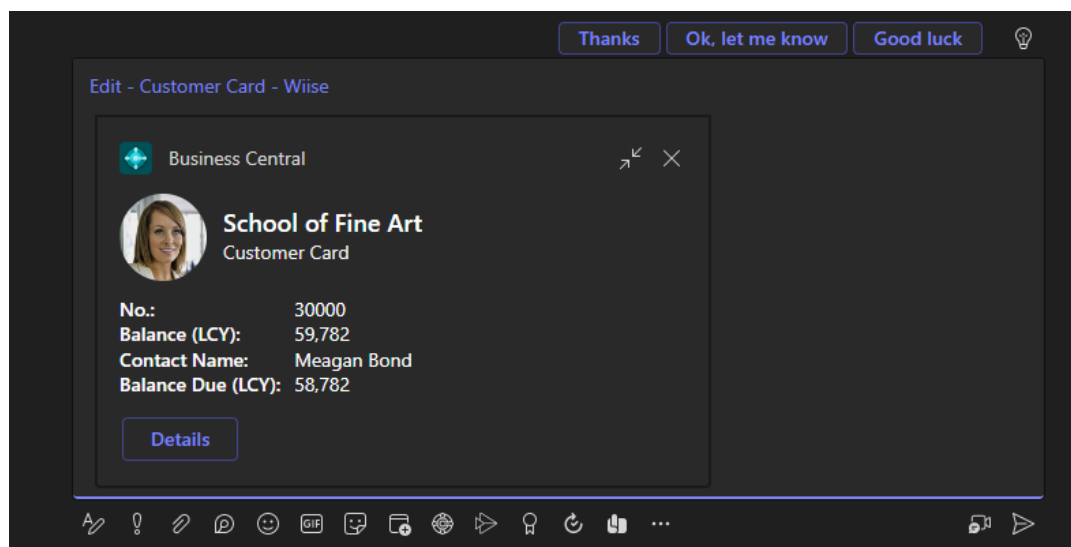
Step 4 - Sharing Records in Microsoft Teams

1. To utilize the app for sharing a Wiise record, first open the desired record within the Wiise platform.
It's important to note that the app is optimized for displaying cards for nearly any type of Wiise page, though the most optimal experience is achieved when working with pages that present a singular record, such as an item, customer, or sales order.

2. Copy the link to the page.
Copying the link to the record can be accomplished in two ways. The simpler and recommended method involves selecting "Share" within Business Central and then choosing "Copy Link." Alternatively, the entire URL can be copied directly from the browser's address bar.



3. Proceed to Teams and initiate a conversation, which can be a chat with an individual, a group of people, or a team channel.
4. Paste the link (URL) in the message box where you compose a message.

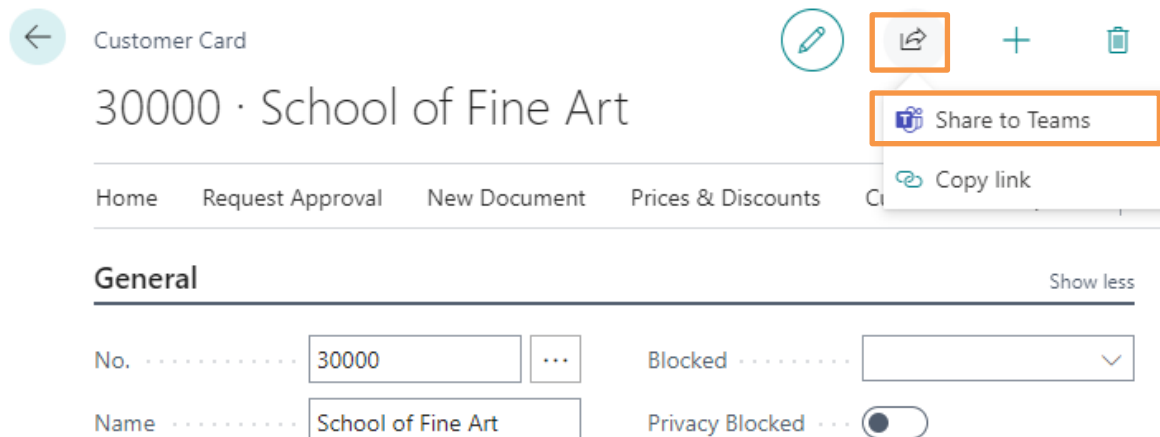


5. When you paste the link for the first time in a conversation, you will be prompted to sign in to Wiise and provide your consent to the app to access the data. You can follow the instructions displayed on the screen to complete the process.

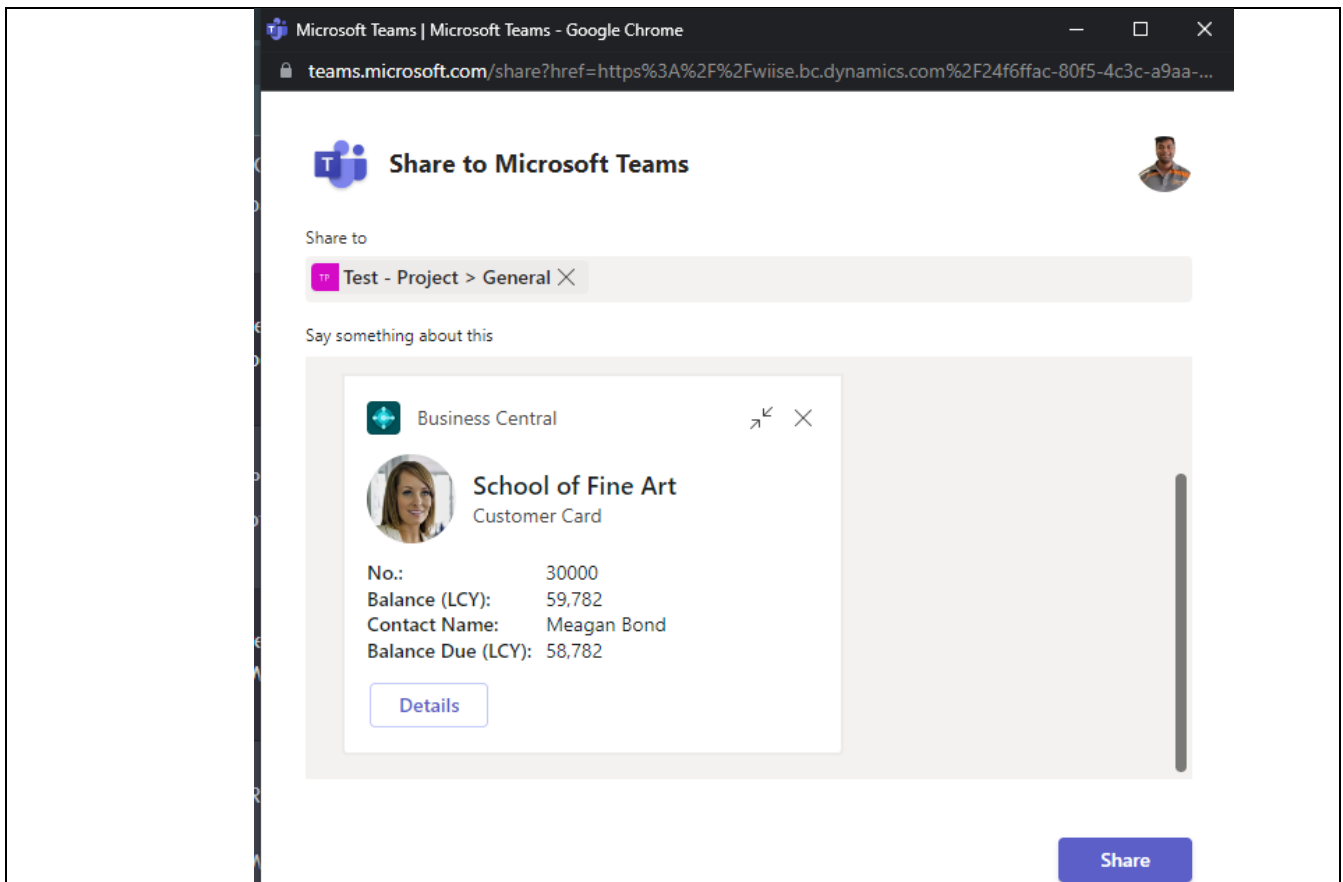
6. Wait a moment while a card is generated in the message box.
7. Before sending the message, it's important to carefully review the contents of the card for any sensitive information. Once the message is sent, the card will be visible to everyone in the conversation.
8. If the card looks good, select Send to submit it to the conversation.

Step 4 – Sharing Page Links in Microsoft Teams

1. In Wiise, open the page that you want to share.
2. At the top of the page, choose to other apps action on pages. icon, then Share to Teams.



3. If you're asked, sign in to Teams with your user name and password.
4. In the Share to Teams page, type a name of a person, group, or channel that you want send the message to.



5. The message box will include a link to the page. If the Business Central app for Teams is installed, a card for the linked record or page will also appear in the message box.

Add any more information if you like, then choose Share.

The link has now been shared. If you want to go to the conversation, choose Go to Teams.



Your link has been shared.

[Go to Teams >](#)

Close