DYNAMICS 365 MEETING SCHEDULER

Solution to schedule a meeting from CRM instances using Power App platform.

Contents

Introduction

A Solution to schedule a meeting from CRM instances using power platform. This canvas app provides all the features of schedule meeting as out look.

Prerequisite:

- Dynamics 365 Meeting scheduler is downloaded from App source.
- User must have O365 Login Credentials to use this application.

To begin, User has to https://make.powerapps.com

- Select the Environment where user need to use this app.
- Make sure Meeting Schedule App is available in the Application lists.

Functionality of Meeting Scheduler:

Invite

To add the attendees list to whom we need to send the meeting invite. Attendees list should be part of AAD or any custom id like any other domain accounts.
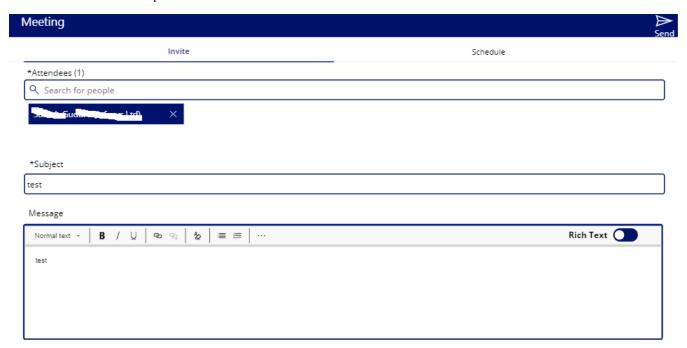
Add a Subject

Message block will have option to select Rich Text option.

Attachments:

Currently Attachments are not included in this version and it could be added in next version of this app.

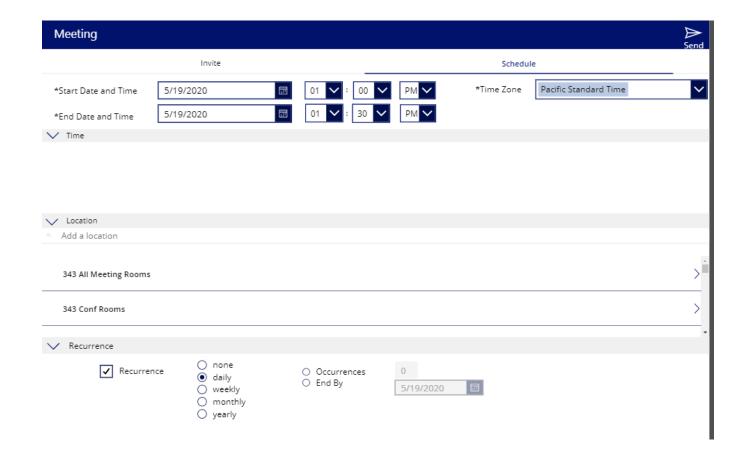Please refer below snapshot for more details.

Schedule

Enter the Schedule Time and Select the Time zone.

Navigate to down and enter the required details for location and Recurrence.

Below is the snapshot for reference:

Meeting — Send

| Invite | | Schedule |

*Start Date and Time 5/19/2020   01 : 00 PM   *Time Zone Pacific Standard Time

*End Date and Time 5/19/2020   01 : 30 PM

∨ Time

∨ Location
  Add a location

  343 All Meeting Rooms ›

  343 Conf Rooms ›

∨ Recurrence

  ☑ Recurrence   ○ none   ○ Occurrences   0
                 ◉ daily   ○ End By
                 ○ weekly   5/19/2020
                 ○ monthly
                 ○ yearly
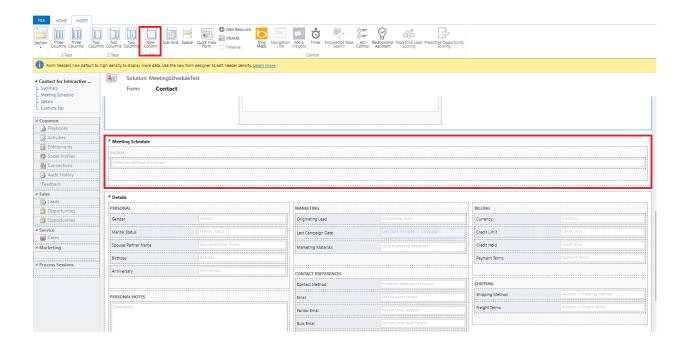
Click on Send button.

How to configure in CRM for any Entity :

Go to Settings→Customizations→Customize the System

Select the Entity→Forms

Add the Field with Name 'Meeting scheduler'.

Add the Tab Section on the Form and Drag the Field to the form

Select Field properties, navigate to Controls tab, and select canvas app control

Field Properties

Modify this field's properties.

? ✕

| Display | Formatting | Details | Events | Business Rules | Controls |

Add Control

Select a custom control from the field.

✕

Canvas app

CC_RadioOption_Name

Option Set

PostLoad Picklist Control

Select custom control to see its configuration

Add

OK   Cancel

Click on Add after selecting Canvas App

Field Properties
Modify this field's properties.

Display | Formatting | Details | Events | Business Rules | Controls

Add Control
Select a custom control from the field.

Canvas app

CC_RadioOption_Name

Option Set

PostLoad Picklist Control

Select custom control to see its configuration

Add

OK | Cancel

Select Web and enter App Id.

App Id will be available in Power Apps.

Field Properties

Modify this field's properties.

? ✕

| Display | Formatting | Details | Events | Business Rules | Controls |

Control	Web	Phone	Tablet	
Option Set (default)	○	◉	◉	
Canvas app	◉	○	○	✕

Add Control...

Canvas app

Property	Value	
Entity name	Contact (SingleLine.Text)	🖉
App name		🖉
App ID *	~b1ee 7 ,~. ~7 ̷ ~9~~ ̷4 ~~5...	🖉

Entity name
Compatible types: SingleLine.Text
This entity will provide data for your canvas app.

Select Customize to create or edit your canvas app in PowerApps Studio

Customize

☐ Hide Default Control

OK   Cancel

This completes this process.