systema AI

Dynamics 365 (F&O) for eCommerce

Instruction Guide:

Implementing Systema AI Recommendations

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Prepared by: Systema AI Pty Ltd
For: Dynamics 365 (F&O) eCommerce Clients

Document Information

Title	Systema AI ISV Connector
Document Name	Instruction Guide
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Purpose	This document is created to assist Dynamics 365 clients in implementing Systema AI recommendations on their eCommerce platform.

Glossary of Terms

Term	Definition
Microsoft AppSource	Microsoft AppSource is an App Store for business applications such as Office 365, Dynamics 365, Power BI, or separate Azure web apps.
Microsoft Dynamics 365 Commerce	Microsoft Dynamics 365 Commerce is an omnichannel e-commerce solution that allows users to build a website, connect physical and digital stores and deliver personalized experiences.
E-commerce storefront	The e-commerce storefront is the customer-facing website rendering system of Dynamics 365 Commerce. It is built on the React.js framework and uses a combination of server-side and client-side rendering to deliver responsive web experiences for one or more online channels.
Site Builder	Site builder is the web-based authoring interface for the content management and storefront website rendering systems. It provides a what-you-see-is-what-you-get (WYSIWYG) editor for site managers and content authors who perform the day-to-day workflow tasks of managing and producing the marketing content for the e-commerce experience.
Power Apps	Power Apps is a low code/no code application platform that allows enterprises to digitize business operations by easily building line of business applications.
Model-driven Apps	Model-driven apps provides a no-code or low-code component approach to app development. Model-driven apps run with the new Unified Interface client which provides a responsive accessible design running in browsers and on popular mobile devices.

Common Data Service	Common Data Service lets you securely store and manage data that is used by business applications. Data within Common Data Service is stored within a set of named entities.
Custom Workflow Activity	Custom workflow activity provides the facility to extend out of the box model-driven app workflows.
LCS	Lifecycle Services (LCS) for Microsoft Dynamics is a cloud-based collaboration portal that customers and their partners use to manage and assist with Microsoft Dynamics 365 for Finance and Operations projects.

1   Solution Overview

Systema AI personalised recommendations is comprised of two main components, the Administration Application ("Administration App.") and the Systema AI Commerce Modules package.

- The Administration app is a Microsoft PowerApps solution that provides the facility for a Dynamics 365 (D365) client to register on Systema AI for the purpose of obtaining recommendations, and also acquire access the Systema Client Dashboard.
- The Systema AI Commerce modules contain script components, which enable the tracking and mapping of user events. The Commerce modules also contain pre-built carousels, which enables Systema's recommendations to be shown on the Product Page, through the use of Systema's Adaptive Recommendations API.

These capabilities allow D365 eCommerce clients to use AI-enabled recommendations to increase sales and revenues, and improve customer engagement.

The following diagram describes the flow of installing and configuring Systema from the AppSource, onto the client's D365 eCommerce instance.

Figure 1 - Solution Flow Diagram
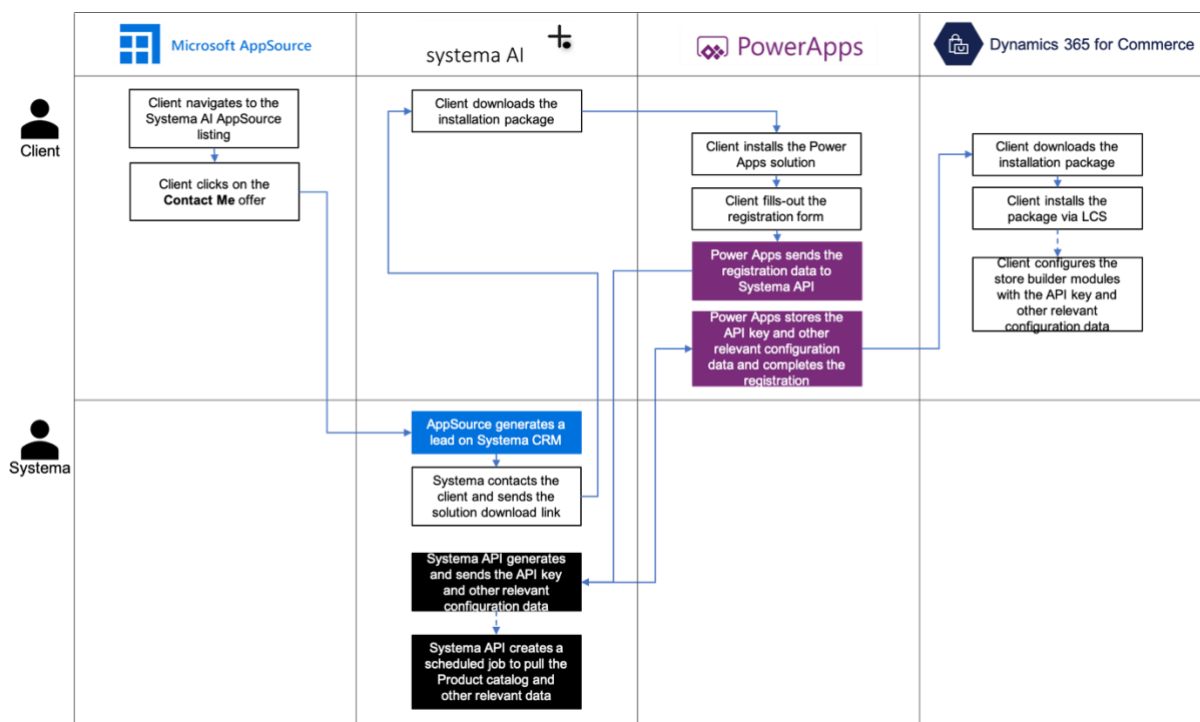
The process starts on the AppSource with the client browsing the Systema AI listing and subsequently clicking on the "Contact Me" offer. A lead will be generated on the configured Lead Management System, which Systema can use to contact the client. Systema will then send the Administration App. (along with the installation instructions) to the client.

Once the client completes the registration process, the download link will be made available. This allows the client to download Systema's AI Commerce Modules package, along with installation instructions. After downloading the package, the client can navigate to Life Cycle Services (LCS) to upload and deploy the solution. Systema's AI Recommendations are now available on the Product Detail Page (PDP) of the Client's Dynamics 365 eCommerce platform.

2   Solution Implementation – from AppSource to Client D365 eCommerce

This section describes the installation and configuration of Systema AI recommendations for eCommerce using the Microsoft Commerce storefront.

1. From the AppSource Marketplace (Microsoft AppSource), search for Systema AI
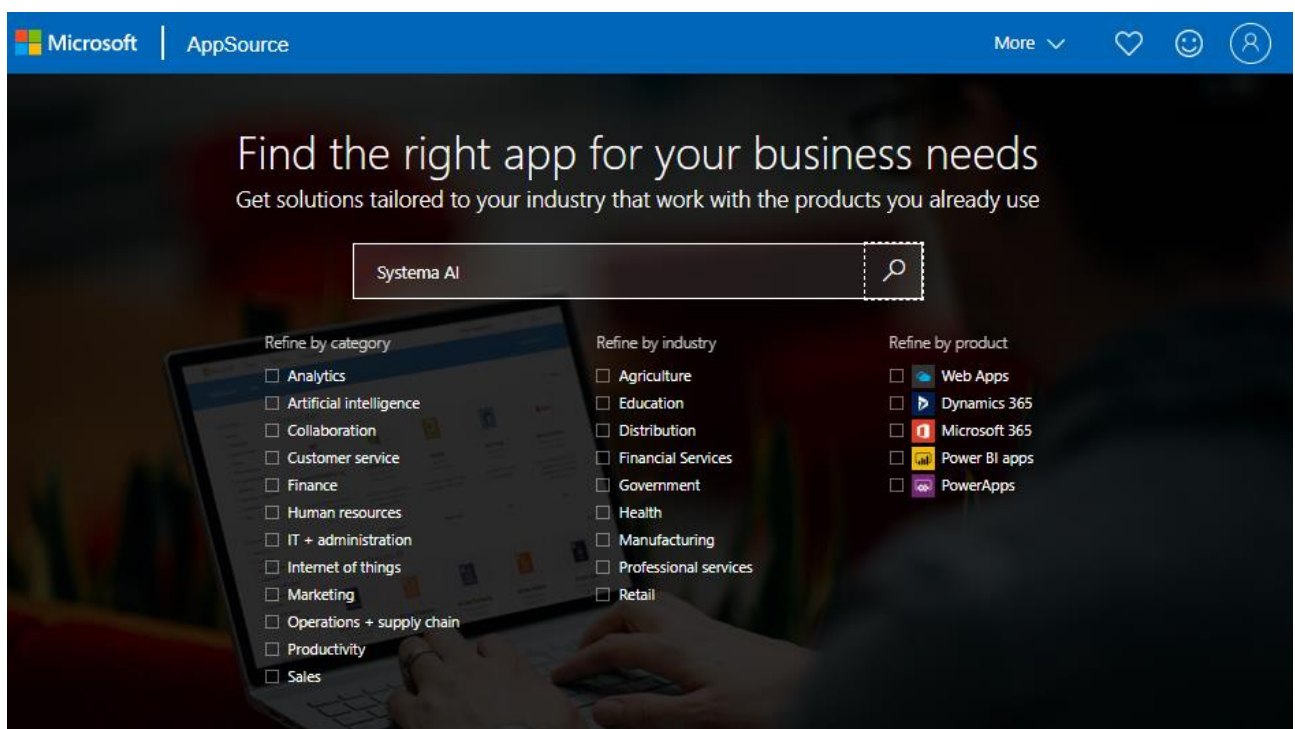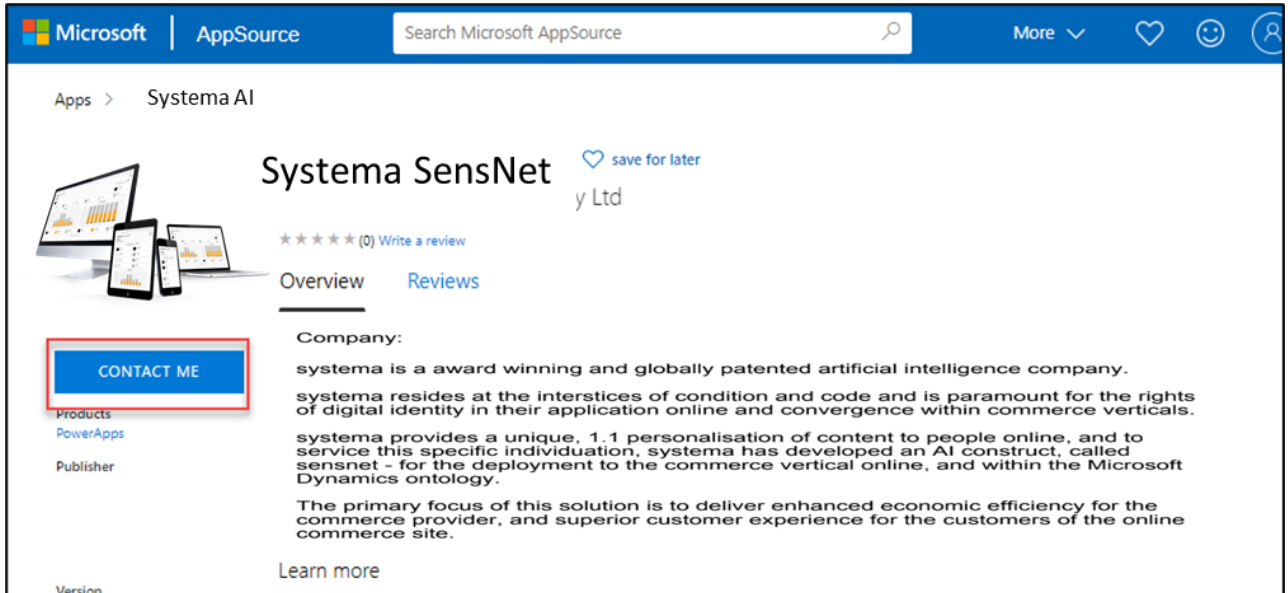
2. On the offering page, click Contact Me

(Sample image used for illustration purposes only)

3. Verify your contact details then click on the "Contact Me" button

4. Client's details are captured in an Azure Table (more information HERE) or in Systema's backend CRM
5. Systema will then re-direct clients to the location of the packaged Administration App. This location will also hold the Instruction Guide, which describes the installation and configuration process.
6. The client will then go to the URL provided in the Instruction Guide and download the packaged Administration App.
7. All D365 Business Application users are entitled to free (limited) Microsoft PowerApps usage. The client will have to install the Administration App via https://powerapps.microsoft.com/.

Please note - as a pre-requisite, a client must have an existing PowerApps environment with an available database. If not, first time clients can opt to create a Trial environment for free via the Admin Centre.

8. Once the trial environment is ready, the client will need to import the solution package from the link provided by Systema. This will be done inside https://powerapps.microsoft.com/ > Solution > Import area.
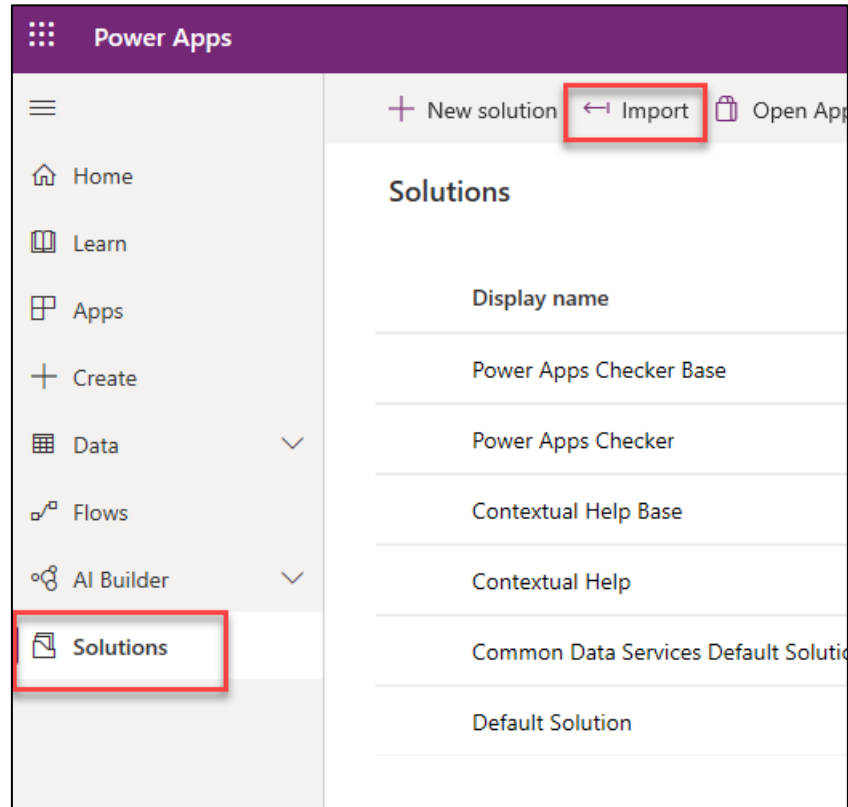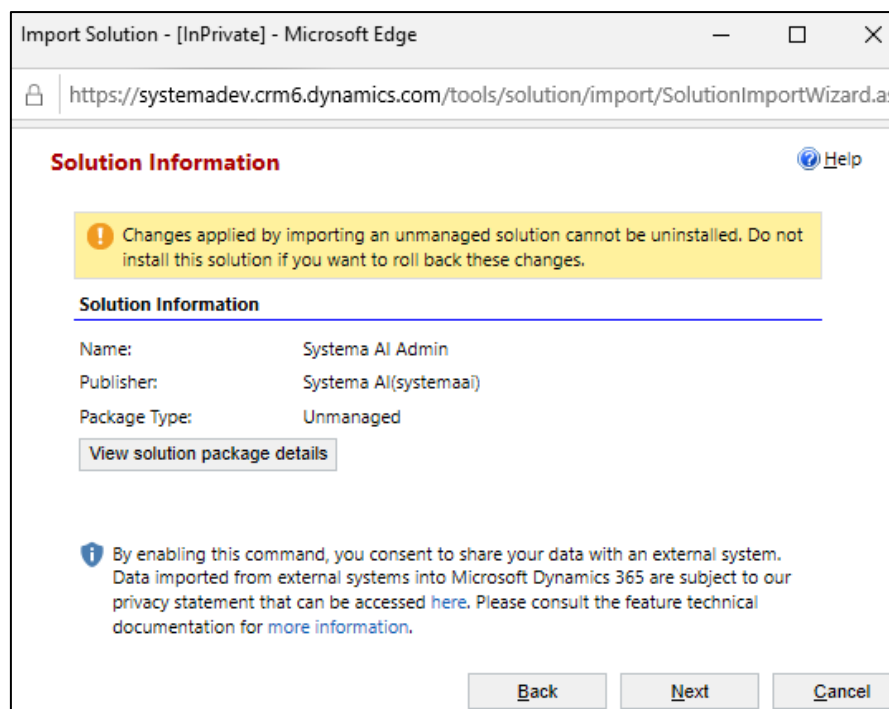
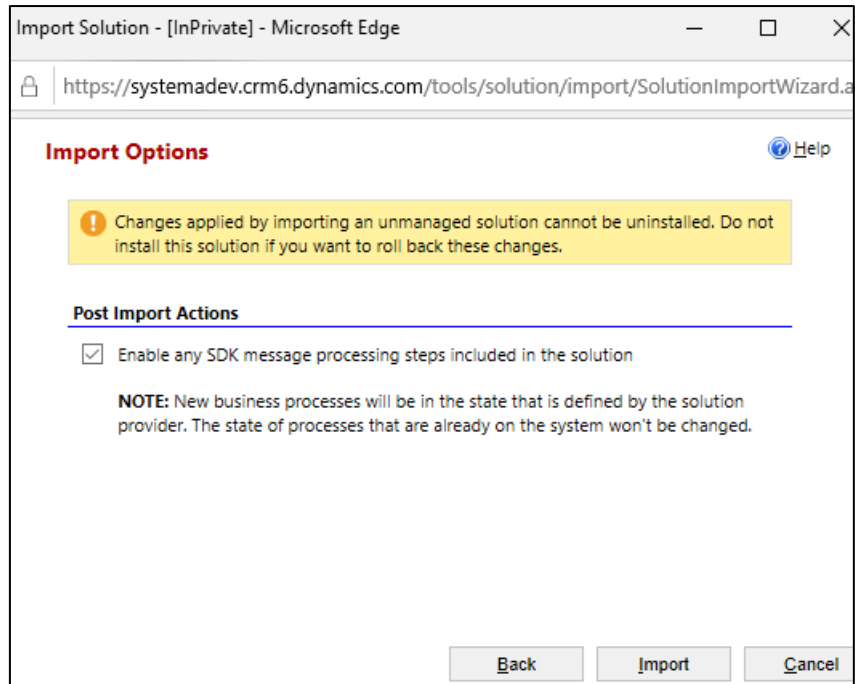9. A wizard will then appear to prompt the user to begin the next steps necessary for importing the solution
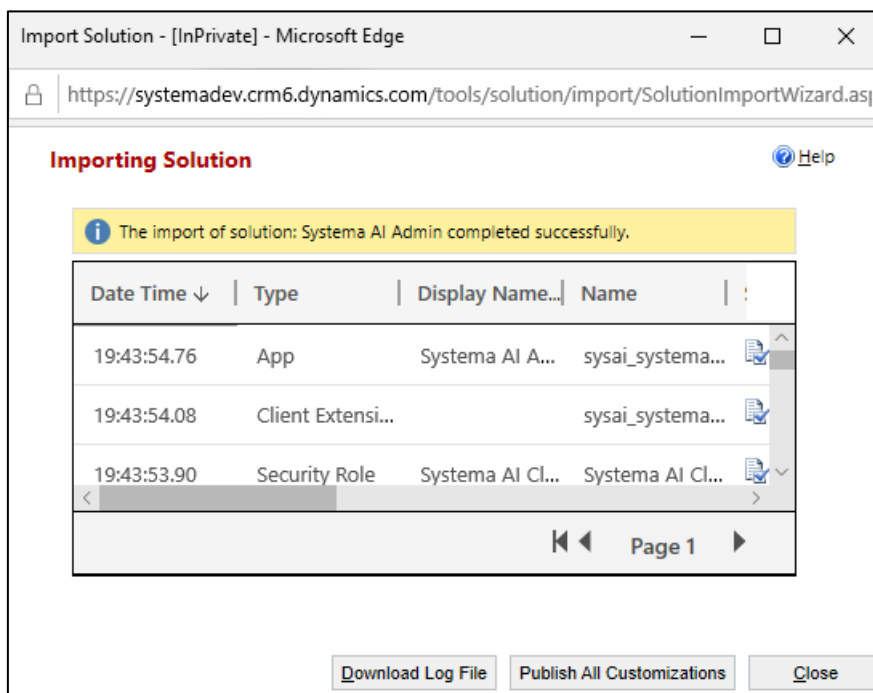
9a

9b
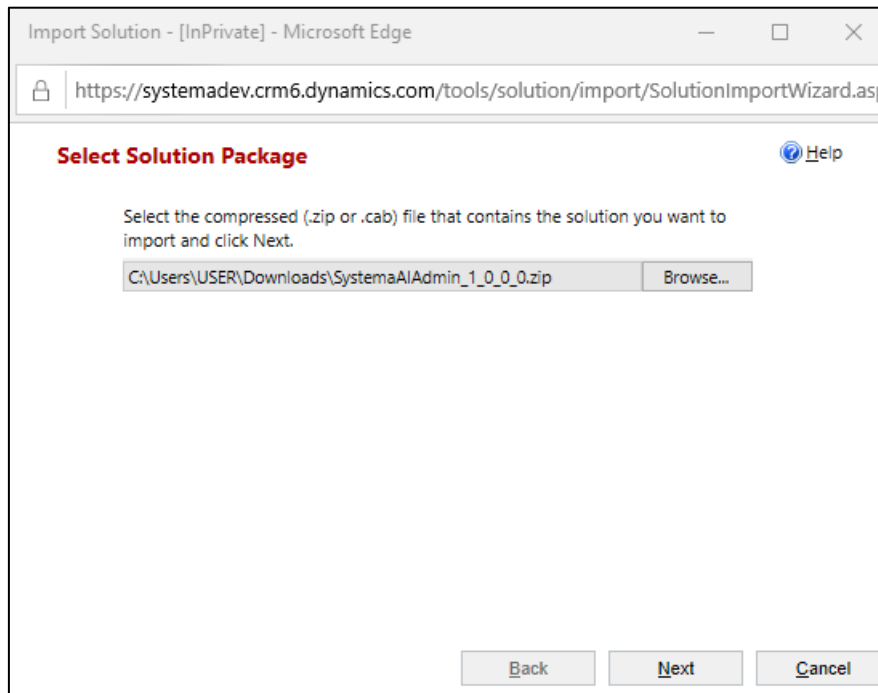
10. Click "Publish All Customization" then close
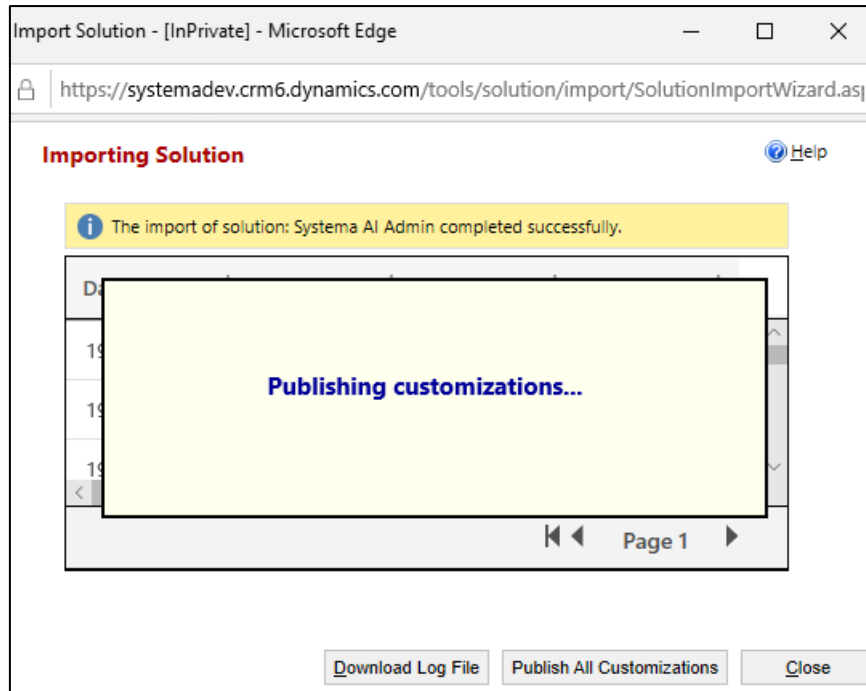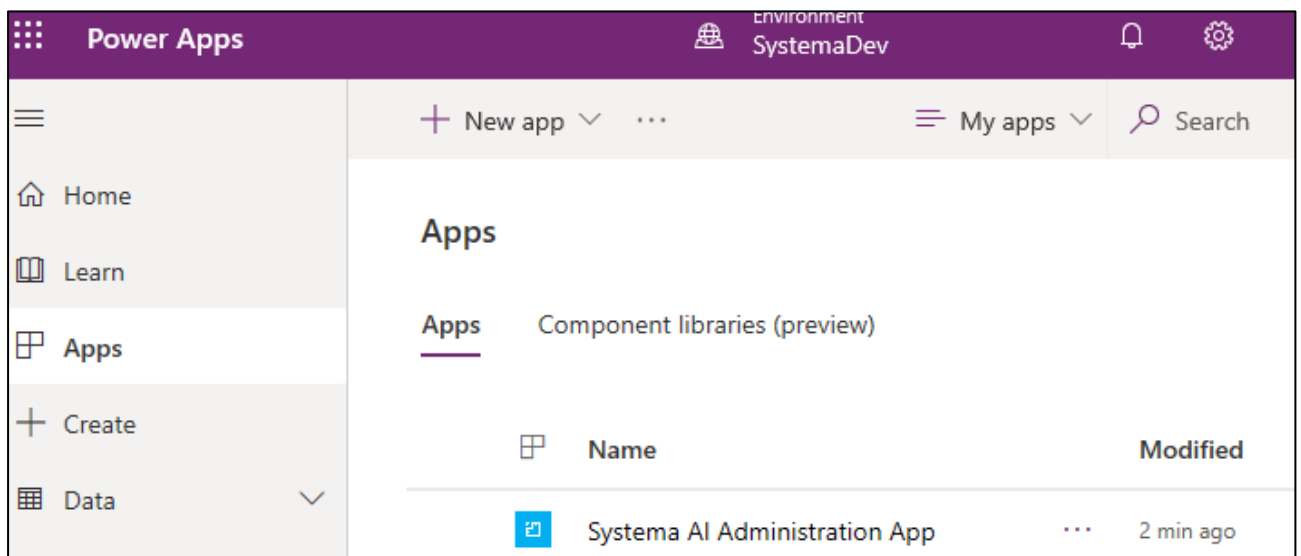
(10b)

Import Solution - [InPrivate] - Microsoft Edge   — □ ✕

🔒 | https://systemadev.crm6.dynamics.com/tools/solution/import/SolutionImportWizard.asp

Importing Solution   ❓Help

ℹ The import of solution: Systema AI Admin completed successfully.

Publishing customizations...

I◀ ◀   Page 1   ▶

Download Log File   Publish All Customizations   Close

11. The Solution will then be available for use under the Apps Module

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⠿ **Power Apps**   🌐 Environment **SystemaDev**   🔔 ⚙

☰   ╋ New app ⌄   ⋯   ≡ My apps ⌄   🔍 Search

🏠 Home

📖 Learn

▦ Apps

╋ Create

▦ Data ⌄

Apps

Apps   Component libraries (preview)

▦	Name		Modified
🔲	Systema AI Administration App	⋯	2 min ago

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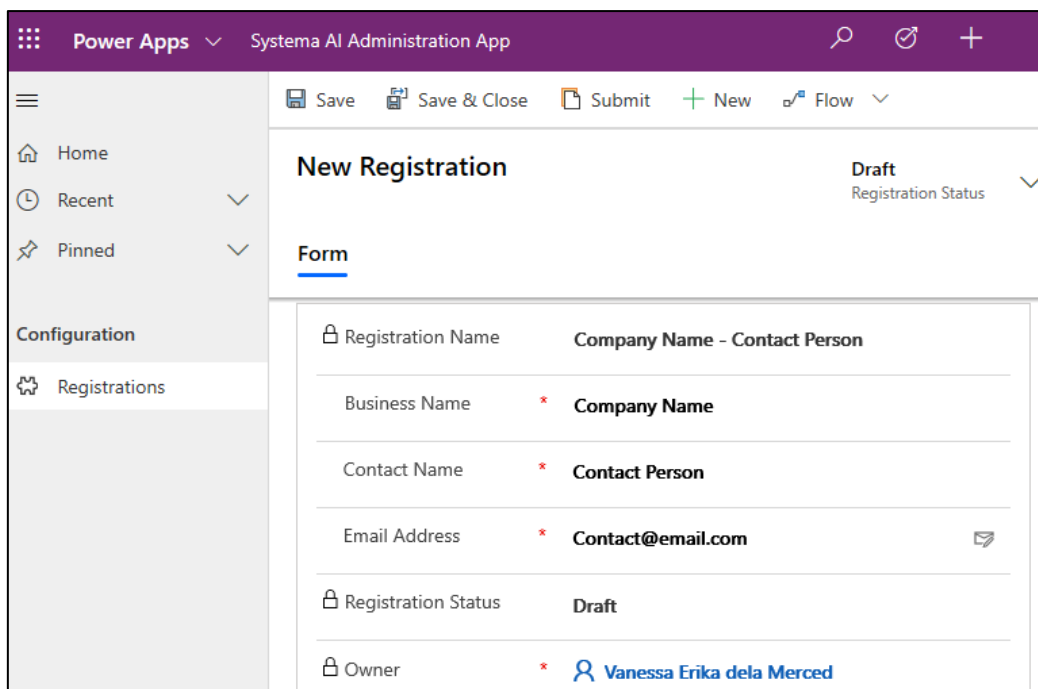
12. To begin Registration, the client will need to open the form by clicking on the "New" button
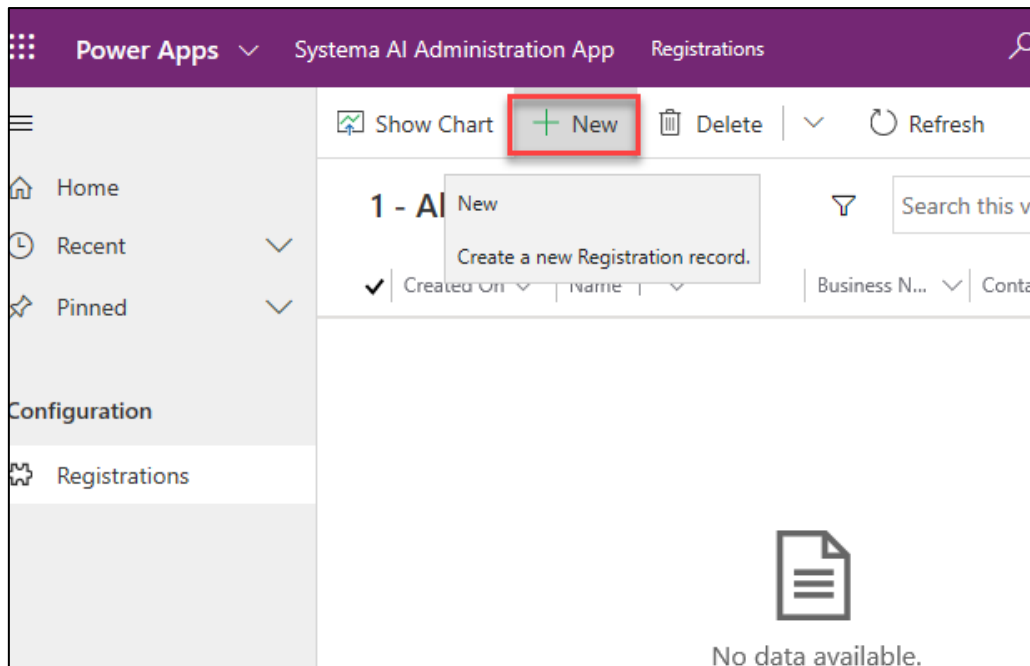
13. The client will need to fill in all the required fields before clicking the "Submit" button. (Information on how to provide client details, is included in the Instruction Guide, via the "Contact Me" option.)

13b

Access Token

Access Token URL	**https://tokenurl.com** 🌐
Client ID	**Client ID**
Client Secret	**Client Secret**
Scope	**Scope**

13c

Commerce Storefront

Are you using a D365 * Commerce Storefront?   **Yes, we are using the D365 Commerce Storefront**
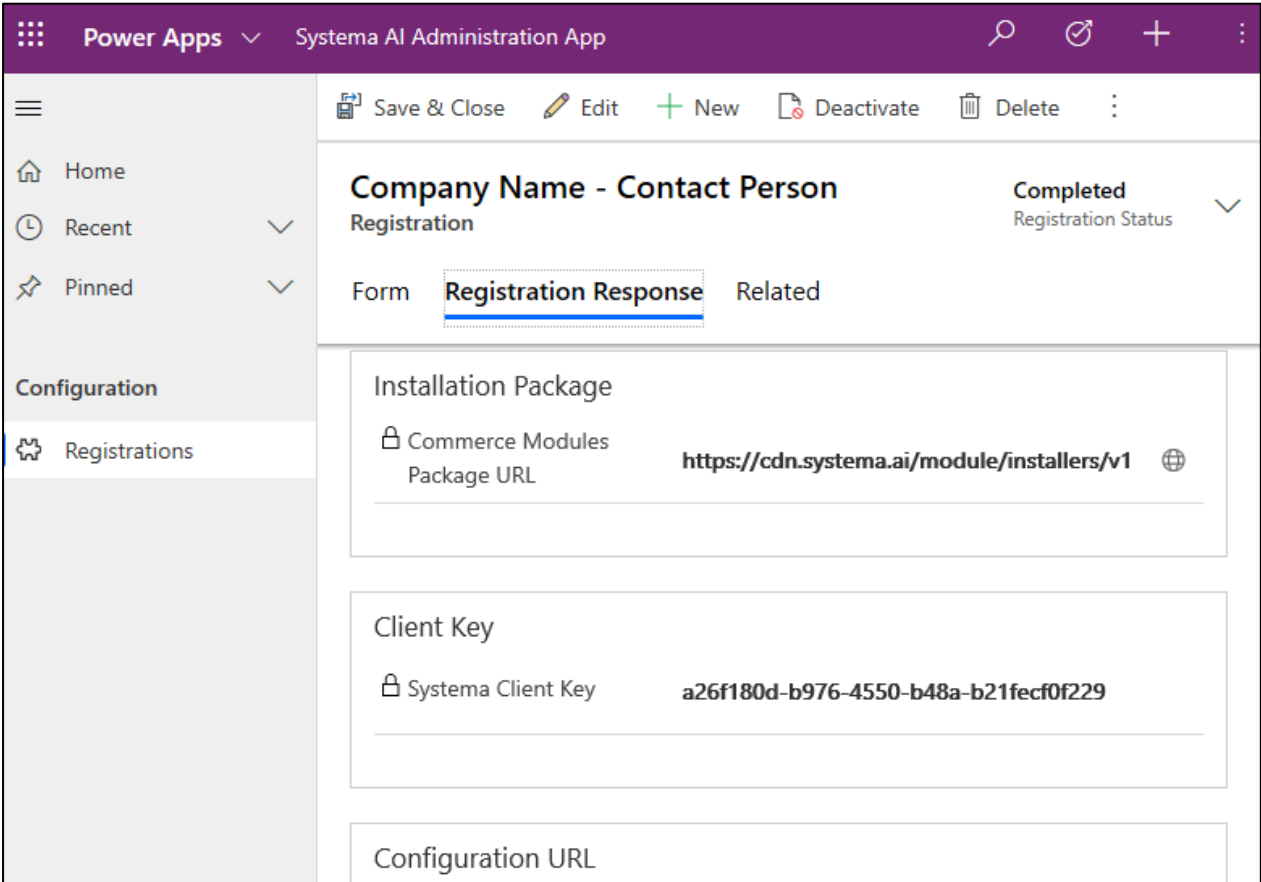
13d

Registration Submission   ✕

Are you sure you want to submit this form?
Once submitted, form cannot be edited.

[Yes]   [Cancel]

14. Once the "Submit" button is clicked, the form will connect to Systema AI via the API and the "Registration Response" form will be populated.

14a

14b

15. The client will then need to access the Commerce Customization package via the link provided on the Registration Response form.
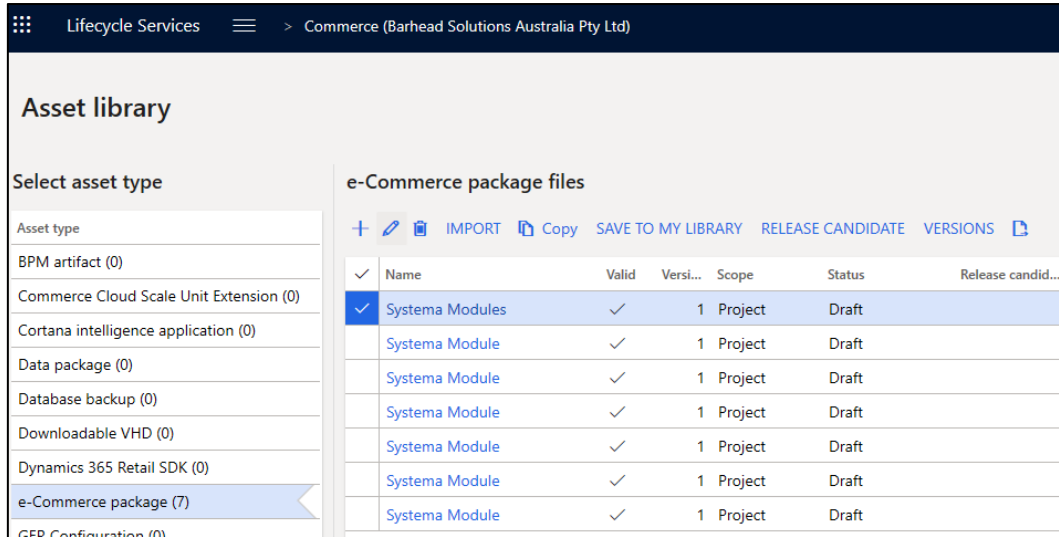
Installation Package

🔒 Commerce Modules
Package URL   https://cdn.systema.ai/module/installers/v1 🌐

16. Once the Custom Package is downloaded, the client will need to access their LCS application and upload the package into their Asset Library

16a

17. The package will then be deployed to the associated D365 eCommerce storefront.
18. Once deployed, Systema's carousel recommendation carousels will appear in the client's storefront.