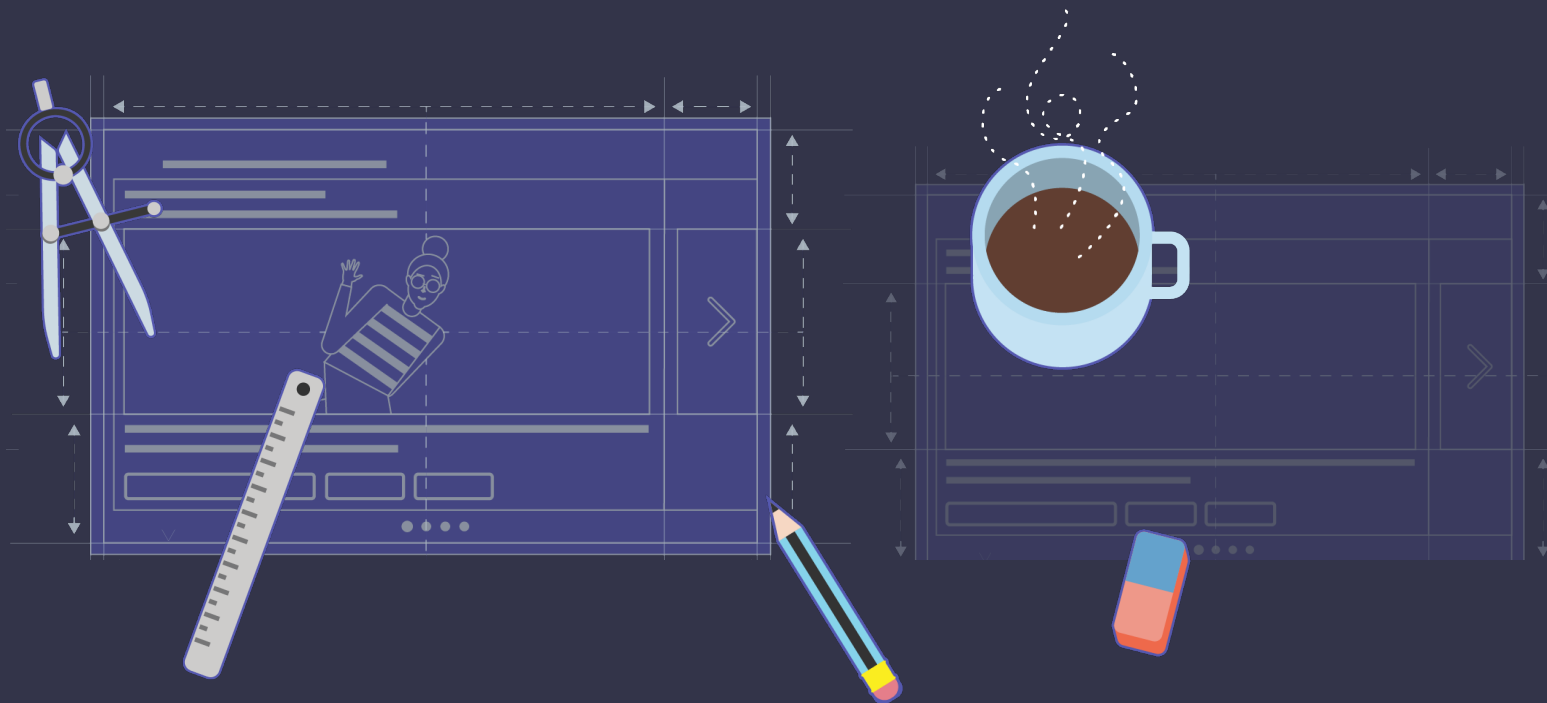


# Best Practices

First Run Experience in Personal Scope



Microsoft Teams Ecosystem



# 1. Have a Personal App Always!

It is recommended to build an app with a bot in personal scope as the fundamental block for any of your app capability. In other words, even if your app can cater to cases only in group or channel scope, still it's worth to build a personal bot to help customers know more about the app or get feedback.

# Apps

Search all

## Browse available apps and services

Add your favorite app for yourself or for your team

[See our top picks](#)



All >

- Apps
- Bots
- Tabs
- Connectors
- Messaging

Top picks

- Analytics and BI
- Developer and IT
- Human resources
- Productivity
- Project management
- Sales and support
- Social and fun

[Upload a custom app](#)



### Trello

Project management

Trello lets your team work more collaboratively and get more done. Trello's boards, lists, and cards enable you to organize and prioritize...



### Contoso

Project Management

Contoso App for Microsoft Teams brings the well-known Contoso project management experience into your collaboration environment.



### Azure DevOps

Developer tools

Plan better, code together and ship faster using Azure DevOps. Search, find work, and collaborate better with your team.



### Freehand by InVision

Communication

Draw, plan, and collaborate on an infinite whiteboard—in real time. Powered by InVision, the Digital Product design platform powering...



### Flow

Workflow + business management

Automate time-consuming and repetitive tasks by integrating your favorite apps and services with Microsoft Flow.



### Jira Cloud

Project management

Jira Cloud is an issue management tool that helps to plan, track, and release world-class software.



### Asana

Project management

Asana helps you clarify who's doing what by when. Assign tasks and due dates to stay accountable to each other.



### Incoming Webhook

Utilities

The Incoming Webhook connector enables external services to notify you about activities that you want to track.



### PowerApps

Developer tools

Help your team work smarter by creating apps that connect to the services and data they use most. Add those apps to your channel so...



### Calendar BOT

Productivity

The Approved Contact Bot is used for calendar comparison and scheduling



### Yammer

News + Weather

The Yammer connector sends notifications about posts, announcements in Yammer groups, posts made by Yammer users and posts containing...



### MindMeister

Productivity

MindMeister is a professional mind mapping software that's both versatile and easy to use. Whether you're a freelancer, a startup or a...



### Smartsheet

Productivity

Add a published sheet, dashboard, or report from Smartsheet to a tab to transform conversations



### Wrike

Project management

Wrike enables every type of team to accomplish more, at scale. Create, access, and update all your



### MeisterTask

Productivity

MeisterTask is a simple yet powerful task management and collaboration tool that



### Tasks in a Box for Teams

Productivity


Tasks in a Box helps you stay on top of your work. Assign tasks, set due dates and follow up on the

- Activity
- Chat
- Teams
- Calendar
- Calls
- Files
- Apps
- Help

# Store

Search all

- All >
- Apps
- Bots
- Tabs
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**Contoso**  
Project Management

★★★★☆ 4.1 (247)

×

Add

**About**

More from [Developer name]

Reviews

Privacy and permissions

Screenshots

1366x768 ratio

....

Contoso App for Microsoft Teams brings the well-known Contoso project management experience into your collaboration environment. You and your team can now to stay focused on the tasks instead of nudging each other over numerous platforms. Simply use the Contoso App for Microsoft Teams to create, assign, edit and manage tasks in your project board. You can also interact with the Contoso bot from your team channel or group. Messaging extension gives you the capability to quickly search for a specific task and submit it to a channel or

← Back

- Planner
- Polly
- Freehand by InVision  
Communication  
Draw, plan, and collaborate on an infinite whiteboard—in real time. Powered by InVision, the Digital Product design platform powering...
- Incoming Webhook  
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- Tasks in a Box for Teams  
Productivity  
Tasks in a Box helps you stay on top of your work. Assign tasks, set due dates and follow up on the work of your team.

Add a published sheet, dashboard, or report from Smartsheet to a tab to transform conversations into action.

Wrike enables every type of team to accomplish more, at scale. Create, access, and update all your projects and collaborate more effectively by...

MeisterTask is a simple yet powerful task management and collaboration tool that perfectly adapts to your team's workflow and...

## 2. Welcome Card

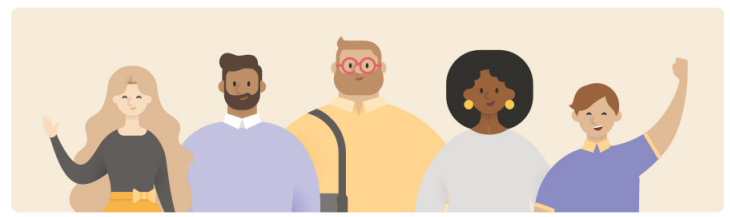
As soon as the customer installs your app, show a welcome card in the personal scope with following details:

- Title: Welcome your customers by saying hello
- Image: Use an image that best describes your app on Teams
- Description: A brief introduction about your app
- Action buttons: Few action buttons can be used here:
  - Take a tour (for new users)
  - Sign-in (for existing users coming from other platforms)
  - Sign-up (for new users)



Contoso 08:00 AM

### Welcome!



Hi there! I'm Contoso Bot! 🙌

You can use Contoso Bot to create a new board, add taks to it, assign tasks and edit tasks right from Microsoft Teams. Learn More by clicking on 'Take a Tour' below

- Take a tour
- Sign in
- Sign up

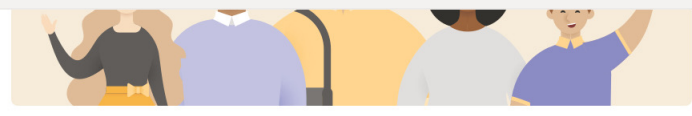
Type a new message



## 3. Tour Card

If a customer clicked on 'Take a tour' card on your welcome card, tell them more about your app by either showing a carousel of images or showing them a video of your app on Teams. Use adaptive card or task module to show images and videos. Also, use this opportunity to place a 'Sign Up' action button on this card.

Every carousel card should have dedicated button. Optimal number of cards to be shown here should be 3

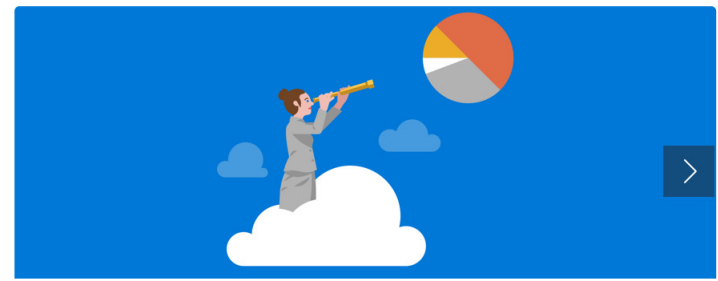


Hi there! I'm Contoso Bot! You can use Contoso Bot to create a new board, add taks to it, assign tasks and edit tasks right from Microsoft Teams. Learn More by clicking on 'Take a Tour' below

- Take a tour, Sign in, Sign up

Contoso 08:00 AM

Create tasks easily

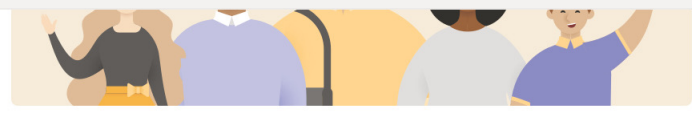


Create new tasks from Teams. Use the create task command or select this option from messaging extnsion in a conversation. You can fill out basic information about the task, assign it to a teammate, set a due date, and add it to your project

- Create task, Go to documentation

Type a new message



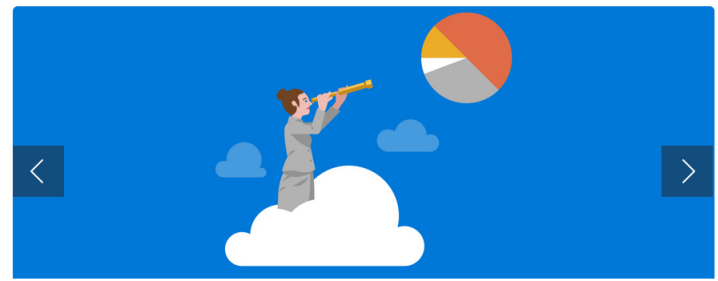


Hi there! I'm Contoso Bot! 🙌  
You can use Contoso Bot to create a new board, add taks to it, assign tasks and edit tasks right from Microsoft Teams.  
Learn More by clicking on 'Take a Tour' below

- Take a tour
- Sign in
- Sign up

Contoso 08:00 AM

### Access all projects



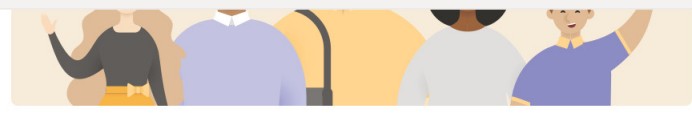
See all the projects that are you part of by simply typing the see projects command. Select any project from the list displayed to see the tagged tasks

- See projects
- Go to documentation

Type a new message



- Activity 2
- Chat 1
- Teams 1
- Meetings
- Calls
- Files
- Contoso



**Hi there! I'm Contoso Bot!** 🙌

You can use Contoso Bot to **create a new board, add tasks to it, assign tasks and edit tasks** right from Microsoft Teams.

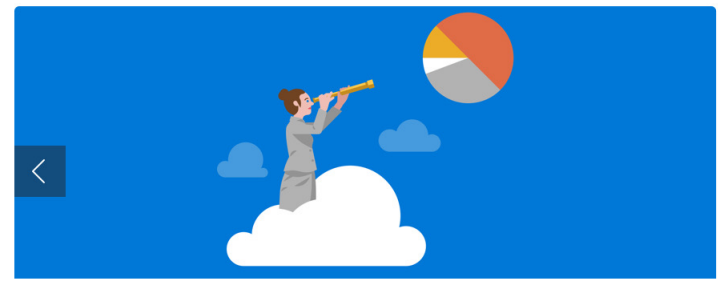
Learn More by clicking on 'Take a Tour' below

- Take a tour
- Sign in
- Sign up



Contoso 08:00 AM

### View tasks at one place



Simply type the view tasks command to see the list of all the tasks that are assigned to you. You can then click on any task to get more details about it

- View tasks
- Go to documentation

Type a new message

- Attachment icon
- Link icon
- Emoji icon
- GIF icon
- Sticker icon
- More options icon



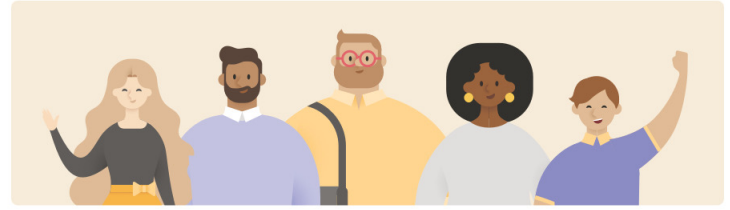
## 4. Login and Sign-up Buttons

You should show both login and sign-up buttons on your welcome card or on your help card (in case you have a card for help command) for non-logged in customer or first-time customers. However, the same buttons for login and sign-up should be omitted once the customer is logged in.



Contoso 08:00 AM

### Welcome!



Hi there! I'm Contoso Bot! 🙌

You can use Contoso Bot to create a new board, add taks to it, assign tasks and edit tasks right from Microsoft Teams. Learn More by clicking on 'Take a Tour' below

- Take a tour
- Sign in
- Sign up

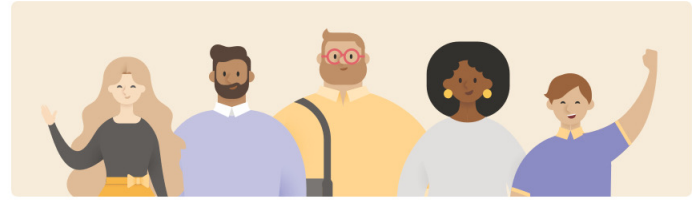
Type a new message





Contoso 08:00 AM  
Thanks, Daniella Mander! You're logged in. 👍

### Welcome!



Hi there! I'm Contoso Bot! 🙌

You can use Contoso Bot to create a new board, add taks to it, assign tasks and edit tasks right from Microsoft Teams.  
Learn More by clicking on 'Take a Tour' below

Take a tour

Type a new message



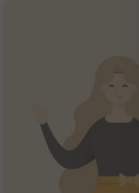
## 5. SSO + AAD

Wherever possible, use AAD SSO for signing in and signing up customers. It saves a lot of time for the customers and is a great convenience.

Tip: Do take confirmation from the user before you silently authenticate them. This can be done by showing the account through which the user has logged into Teams. This serves an opportunity to show other options for the users to sign in


Contoso 08:00 AM

**Welcome**




Hi there! I'm C  
You can use C  
assign tasks a  
Learn More by

Take a tou




**Contoso**  
Sign in


×



## Pick an account



Ankur Yadav  
ayadav@microsoft.com  
Connected to Windows



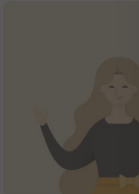
Use another account

Back

Type a new message

Contoso 08:00 AM


**Welcome**



Hi there! I'm C...

You can use C...  
assign tasks a...  
Learn More by...


Take a tou...




**Contoso**

Sign in

✕




## Sign-in options



**Sign in with a security key**

Choose this only if you have enabled a security key for your account.

?



**Sign in with GitHub**

Personal accounts only

?


Back

Type a new message



## 6. 'Help' Command

Always have support for 'help' command. In reply to 'help' command, you can display a listing card that has list of all the commands and short description of each command.




**Hi there! I'm Contoso Bot!** 🙌

You can use Contoso Bot to **create a new board, add taks to it, assign tasks and edit tasks** right from Microsoft Teams.

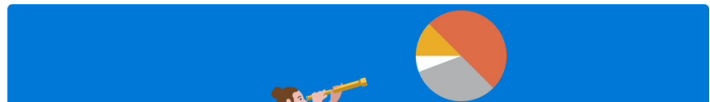
Learn More by clicking on 'Take a Tour' below

[Take a tour](#) [Sign in](#) [Sign up](#)



Contoso 08:00 AM

**View tasks at one place**



- What can I do? ▾
- create task** creates a new task in Contoso
  - see projects** displays all your connected projects
  - view tasks** show all your tasks sorted by most recent ones
  - sign in** sign in to the contoso app
  - sign out** sign out of contoso app
  - sign up** register for a new account in contoso app
  - help** need help with perspective app

Type a new message

View tasks Go to documentation

10:58 AM help



Contoso 08:00 AM

I'm happy to help!

Hey Daniella, here are the commands you can use with this app:

- create task**  
creates a new task in Contoso
- see projects**  
displays all your connected projects
- view tasks**  
show all your tasks sorted by most recent ones
- sign in**  
sign in to the contoso app
- sign out**  
sign out of contoso app
- sign up**  
register for a new account in contoso app

Type a new message



# 7. Nudge Customers to Use Top Features

Since the new customers might not know all the powerful features of your app, you can show these by using adaptive cards and action buttons. Ensure that these tasks are easy to complete so that the users have a sense of fulfilment post completing these tasks. For instance:

- Ask customers to create a new project by telling them to use 'create' command along with project name.
- Ask customers to type questions like 'Which city generated highest sales last year?' for the bot to answer.
- Ask customers to add items to a project by letting them type a command.

**I'm happy to help!**  
 Hey Daniella, here are the commands you can use with this app:

- create task**  
creates a new task in Contoso
- see projects**  
displays all your connected projects
- view tasks**  
show all your tasks sorted by most recent ones
- sign in**  
sign in to the contoso app
- sign out**  
sign out of contoso app
- sign up**  
register for a new account inn contoso app

10:58 AM  
create task

**Contoso** 08:00 AM

Click the button to create a new task

[Create task](#)

Type a new message

I'm happy to help! Hey Daniella, here are the commands you can use with this app: create task, see projects, view tasks, sign in, sign out, sign up

Contoso Sign in dialog box with fields for Task name, Assignee (Ankur Yadav), Due date (No due date), Asana project, and Task description.

10:58 AM create task

Contoso 08:00 AM Click the button to create a new task

Type a new message



# 8. Handling Incomprehensible Commands

If a command is typed that cannot be understood by the bot, show following actions to the customers:

- Help: Ask customers to use 'Help' command to get a list of legible commands
- Send Feedback: Ask customers to use this button to send any feedback for you to consider building in future. You can take feedback by opening a task module in the Teams app. (can be mad part of help card)
- Nudge top features



**Contoso** 08:00 AM

Click the button to create a new task

[Create task](#)

Your task "Test task" has been created

**Test Task for Contoso**

Assigned to Ankur Yadav    Due date Sep 30, 2020

This is the first task in this project

10:58 AM  
abcd

**Contoso** 08:00 AM

I am not sure what "abcd" means, but I want to help! Try choosing any of the following commands to see what I can do for you.

[Help](#)   [Send Feedback](#)   [Create task](#)

[See projects](#)   [View tasks](#)

Type a new message

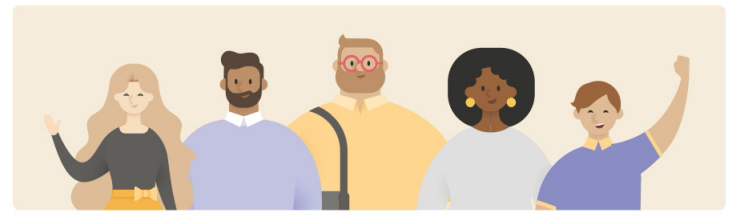
## 9. Trial Period for Paid Apps

If your app can only be used with a subscription, always have a free trial period that can be consumed by the customers after signing up. Free trial period gives a chance to customers to use your app before paying for the subscription. You can ask customers if they want to buy subscription or use trial period after installation. If they choose trial period, then sign them up for a trial period without taking them out of Teams app.



Contoso 08:00 AM

### Welcome!



Hi there! I'm Contoso Bot! 🙌

You can use Contoso Bot to create a new board, add taks to it, assign tasks and edit tasks right from Microsoft Teams.

Learn More by clicking on 'Take a Tour' below

Take a tour

Sign in

Sign up for free trial

Type a new message

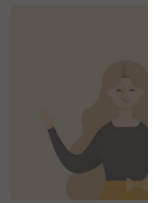


- Activity <sup>2</sup>
- Chat <sup>1</sup>
- Teams <sup>1</sup>
- Meetings
- Calls
- Files
- Contoso



Contoso 08:00 AM

## Welcome



Hi there! I'm C  
 You can use C  
 assign tasks a  
 Learn More by

Take a tou



**Contoso**  
Sign up



## Try Contoso for free

1 month free, then \$9.99/month

Sign up for Microsoft 

Or sign up with an existing account:

Enter your custom email

Type a new message

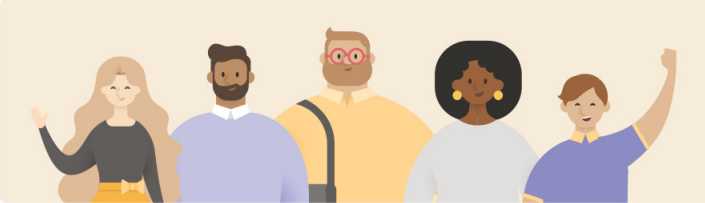
- 
- 
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- 
- 





- Activity 2
- Chat 1
- Teams 1
- Meetings
- Calls
- Files
- Contoso

## Welcome!



**Hi there! I'm Contoso Bot!** 🙌

You can use Contoso Bot to create a new board, add tasks to it, assign tasks and edit tasks right from Microsoft Teams. Learn More by clicking on 'Take a Tour' below

[Take a tour](#)

## Signed-up successfully!

Welcome Joni Sherman! Here are the commands that you can use

- create task**  
creates a new task in Contoso
- see projects**  
displays all your connected projects
- view tasks**  
show all your tasks sorted by most recent ones

Type a new message



# 10. Help and About Tabs

Your app should have following tabs in the personal scope:

- Help: Land your customers here whenever they type a command to know more about using your app. Keep all the comprehensive documents and videos here for the customers to refer to.
- About: This tab will fetch details from your app description, Privacy Policy and Terms of Use.



## Contoso App on Microsoft Teams

Now collaborate with your colleague on any project using the Contoso App on Microsoft Teams. A comprehensive guide on using the app is given below. So, read it and start managing your projects on the fly.

### Some Points to Consider:

You need to connect your existing Contoso account on Microsoft Teams to start using it. The Contoso app is available for free to all the customers of Microsoft Teams. All your team member should be part of the same project to start collaborating.

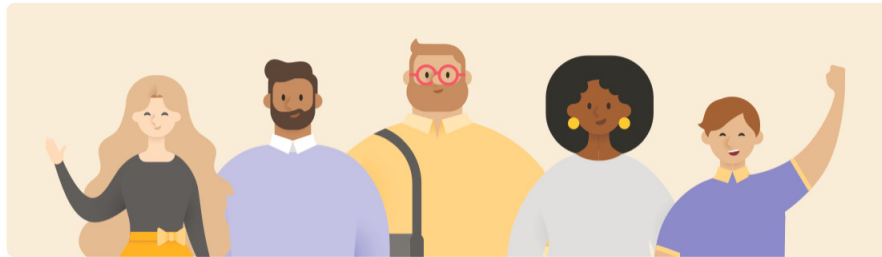
## How to Sign in or Sign Up?

You can either register for an account using the 'Sign Up' command or click on 'Sign In' button to log into your existing account as given in the below screenshot:



Contoso 08:00 AM

### Welcome!



**Hi there! I'm Contoso Bot!** 🙌

You can use Contoso Bot to **create a new board, add tasks to it, assign tasks and edit tasks** right from Microsoft Teams.





Contoso
Published by Contoso Corporation
Version: 1.2.1

Contoso App for Microsoft Teams brings the well-known Contoso project management experience into your collaboration environment. You and your team can now to stay focused on the tasks instead of nudging each other over numerous platforms. Simply use the Contoso App for Microsoft Teams to create, assign, edit and manage tasks in your project board. You can also interact with the Contoso bot from your team channel or group. Messaging extension gives you the capability to quickly search for a specific task and submit it to a channel or group for discussion. With the message actions, you can create a new task at the click of a button. Also, you can add your project board to your channel or group as a tab, so that your team could easily track and work on the tasks within the tab.

- Tab Bot Connector

Website Privacy Policy Terms of Use



# Thank You

Microsoft Teams Ecosystem

