

Teams & Power Platform

Demo Guide

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Table of Contents

[Demo summary 4](#_Toc29884039)

[Before you begin 4](#_Toc29884040)

[Recommended devices 4](#_Toc29884041)

[User accounts 4](#_Toc29884042)

[Pre-demo setup steps 5](#_Toc29884043)

[Demo persona setup 5](#_Toc29884044)

[Demo steps 6](#_Toc29884045)

[Introduction 6](#_Toc29884046)

[Power Platform 6](#_Toc29884047)

[Conclusion 8](#_Toc29884048)

# Demo summary

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| --- | --- |
| **Overview** | Megan Bowen is responsible for processing returns. She uses the Microsoft Power Platform to improve her returns workflow, leveraging Power Apps, Power Automate, and Power BI inside Microsoft Teams |
| **Technologies** | Microsoft Teams, Microsoft Power Platform |
| **Intended audience** | Business Decision Maker, Decision Maker, IT Pro |
| **Total length** | 5 Minutes |

# Before you begin

## Recommended devices

This demo requires the following devices:

* A Surface or other Windows 10 device with a web browser installed (e.g. **Edge**).

## User accounts

* User name: MeganB@teamspowerplatform2020.onmicrosoft.com
* Password: Te@ms123

# Pre-demo setup steps

Complete the following steps before each presentation of the demo.

## Demo persona setup

1. Start a new or InPrivate Edge browser session and sign into [www.office.com](http://www.office.com) using the **Megan Bowen** (alias MeganB) credentials listed above.
2. Click **OneDrive**.
3. Open the **Teams & Power Platform folder**.
4. Select the check box to the left of **Mark 8 drone.jpg**, click **Download**, and then save the image to the local device.
5. Navigate back to the **Microsoft Office Home** browser tab and click **Teams**.
6. Click **Get the Windows app**.
7. Once downloaded, sign into the **Teams** desktop app as **MeganB** using the credentials listed above.

**NOTE:** This will be the starting location for this demo.

1. Sign out of and close the browser session.

# Demo steps

## Introduction

| **What to say** | **What to show** |
| --- | --- |
| Microsoft Teams has built in features, enabling employees to customize their own workspaces. Over the past two years, this customized experience has grown dramatically. Organizations can now build their own applications and integrate them seamlessly into their teams within Microsoft Teams platform.  Megan Bowen is a customer service representative at Contoso Electronics and is responsible for processing returns. Contoso has created their own returns app using the Microsoft Power Platform to improve their returns workflow for their representatives, while leveraging Power Apps, Power Automate, and Power BI. | No click steps. |

## Power Platform

| **What to say** | **What to show** |
| --- | --- |
| **Power Apps**  To improve efficiencies in inspecting and processing returns, Megan uses a low code mobile-friendly app built with Microsoft Power Apps, to keep pace with customer’s demands.  From the home screen, Megan can Check Stock, Process Returns, and Review Approvals. Megan needs to process the return of a drone because it has a broken light, so she clicks Process Returns.  In this app, Megan can manually input product model and price details to process a return. However, with AI Builder capabilities, she leverages a machine learning model instead, that she has trained, to recognize the product model and price simply from an uploaded picture of the returned product. This is a huge time saver!  Additionally, she can provide and take notes or feedback on the condition of the returned product.  From here Megan submits the audit and finishes her inspection of the returned drone.  Megan can now use the time saved for even more returns and build relationships with customers through meaningful conversations.  Adding an app to a team channel is as simple as two clicks! | 1. Under the **Operations** team, click the **Returns Processing** channel. 2. At the top, click **CT Returns**. 3. Click **Process Returns**. 4. Click **Detect**. 5. In the **Open** dialog locate and open the downloaded assets folder, extracted earlier. 6. Click to select the image **Drone – Mark 8.jpg**. 7. Click **Open**. 8. Next to **Product Model**, point to but do not click **Drone** **–** **Mark8**. 9. In the **Notes** area add the text: **Broken light**. 10. Click the **Return Approval** dropdown and then click **Yes**. 11. In **Rate Condition** click the 4th **box** from the left. 12. Click **Submit**. 13. At the top, next to **CT Returns**, click **+** to add a new tab. 14. Under **Tabs for your team**, point to but do not click **CT Returns**. 15. Click **X** to close the **Add a tab** pane. |
| **Power Automate - Approvals**  It’s not efficient for Megan’s manager to track and approve each return manually, so Contoso automates this process with Power Automate.  From the **Managers – Returns Approvals** channel, managers can review the details of each return and approve or reject the return. Managers have a running track of all the processed returns and can track approvals, ensuring that Contoso remains in compliance. | 1. Under the **Operations** team, click the **Managers – Returns Approvals** channel. 2. Scroll through previous approvals. 3. Scroll back to the bottom of the postings. 4. In the last item, point to details **Approve** and **Reject**.   **NOTE:** Ensure the posting has not been acted on yet (has Approve and Reject buttons).   1. Click **Approve**. 2. In the comments type: **Please move forward with processing**. 3. Click **Submit**. |
| **Power BI**  With thousands of processed returns each month, managers can now leverage the newly generated data to gain valuable insights. Power BI integration in Teams offers data-driven insights available to everyone, enabling managers to collaborate and drive informed business decisions faster. | 1. Under the **Operations** team, click the **Returns Insights** channel. 2. At the top, click **Return Insights** tab. |
| **Power Automate – New team member**  Power Automate integrated within Teams enables team members to create flows that automate repeatable activities, such as ramping-up a new member to a team.  Megan is automatically alerted with onboarding resources, and her team is automatically notified of a new team member – all within Teams!  This process is streamlined and automated once a group member is added to a specific group and a user profile is created within Office 365.  A prepopulated message is then posted within the team’s conversations, alerting everyone on the team. | 1. Under the **Operations** team, click the **Team Fun** channel. 2. Point to, but do not click, Megan Bowen’s post **Welcome to the Operations team…**. 3. At the top, click the **Power Automate** tab. 4. Click the Flow named **When a group member is** **added or removed**. 5. At the top, click **Edit** (pencil icon). 6. Point to, but do not click, the three steps of the flow: **When a group member is added or removed**, **Get user profile**, and **Post a message**. |

## Conclusion

| **What to say** | **What to show** |
| --- | --- |
| Leveraging the Power Platform, Contoso digitized a paper-based process into an end to end solution. All while ensuring data is seamlessly integrated into Microsoft Teams for easy access. | No click steps. |