# Housing App Accelerator Installation Guide

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**Accelerator Release Version**: v1.0

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**Dynamics 365 Grant Making Solution Installation Guide**

# Document purpose

This document details the process of installing and using the components of the solution.

# Overview

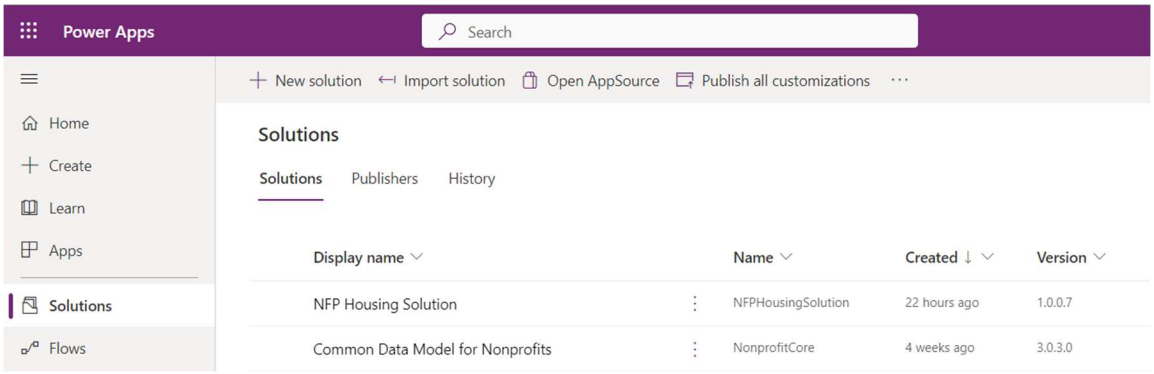
# Prerequisites

Below is the list of components required mentioned in order by which they should be installed:

- Install latest version of **NonprofitCore_3_0_3_0_managed.zip** Dynamics 365 Non-Profit Accelerator's solution from here https://github.com/microsoft/Industry-Accelerator-Nonprofit/releases/download/v3.0.3.0/NonprofitCore_3_0_3_0_managed.zip in your target environment.

# Step by Step Installation

- Navigate to the Github release path <> and download the NFPHousingSolution_1_0_0_7_managed.zip solution from this path https://github.com/ava-innersource/HousingAppAccelerator/releases/download/v1.0.0.7/NFPHousingSolution_1_0_0_7_managed.zip
- Select the target environment where you want to install the solution from https://make.powerapps.com
- Navigate to **Solutions** from the left navigation and click on 'Import' on the top ribbon import the downloaded solution file from the Github release assets. After Import, the following solutions should be available in the target environment.



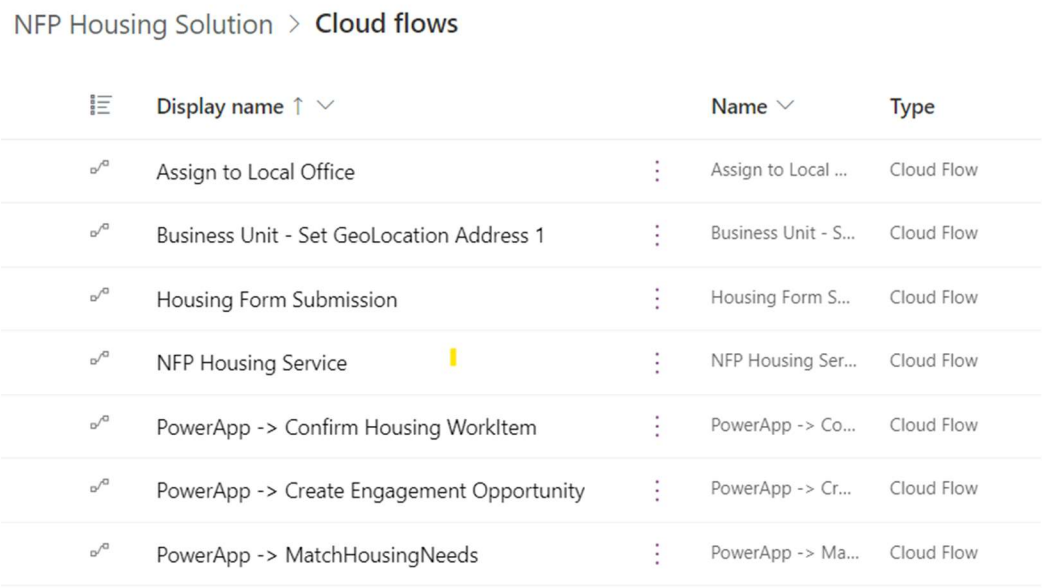

# Microsoft Forms Setup

Use this forms template link to create a copy of this sample Microsoft forms in your tenant which can then be rereferred in the Housing Submission Power Automate to collect answers about landlord and housing location.

https://forms.office.com/Pages/ShareFormPage.aspx?id=i0jEANYP8EiC0Hcr1G3wgyCT9xtRs1xKkBiDhDDBTfBUMFdORUlSRDFHOUdTT1VMV1ZYR0g5WVFRSS4u&sharetoken=5DWJn9e6HuRWl4gOGNVs

# Configuring the Flows (Power Automate)

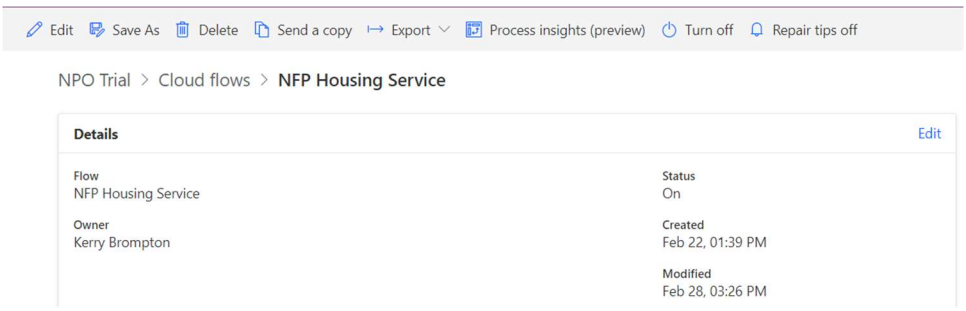
The following flows should be installed as part of the solution:



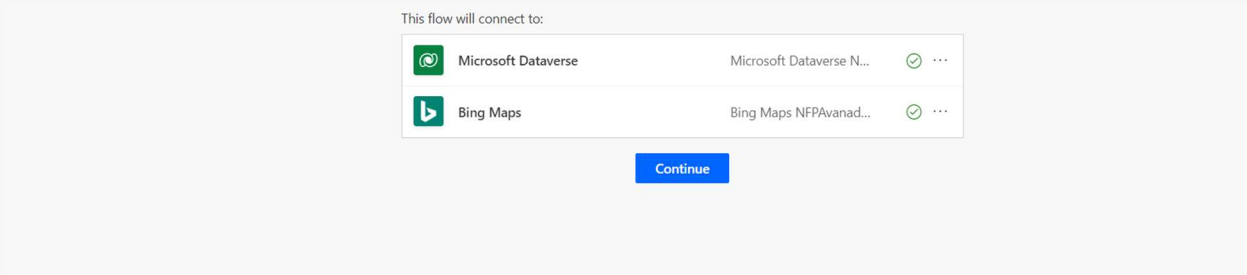

The following steps need to be performed to configure each of the flows and turn them 'On'. You can edit them in the Customizations area or from another unmanaged solution.

1. **<u>NFP Housing Service:</u>**

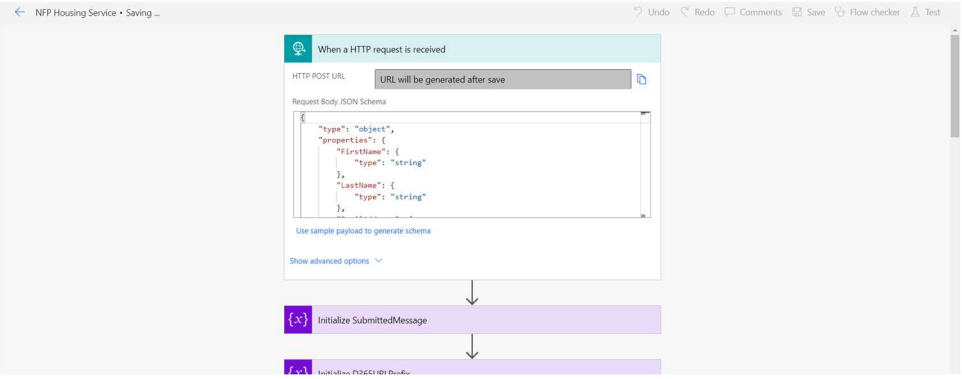
a) Navigate to NFP Housing Service Flow and click on 'Edit'



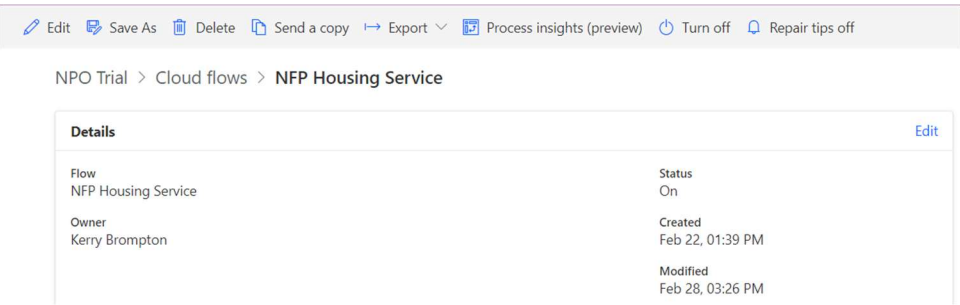
**b) Ensure there is a connection reference created for Dataverse and Bing Maps. You will need to get an API key for Bing maps connection.**




**c) Click on "Save" and copy the HTTP POST URL generated in the first step. This HTTP URL will have to be put in the "Housing Form Submission "flow.**

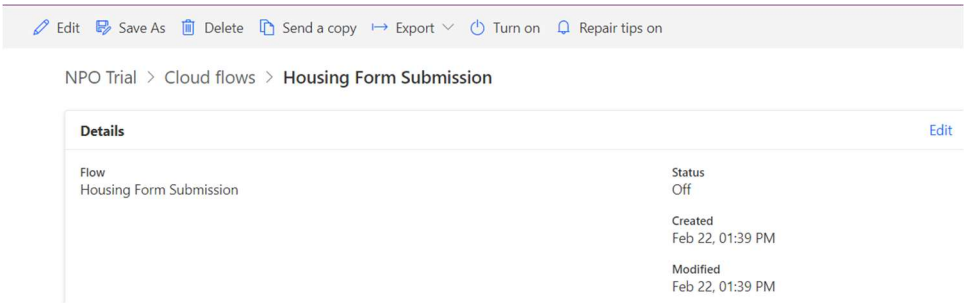



**d) Turn On the flow. Your flow is now ready to use.**

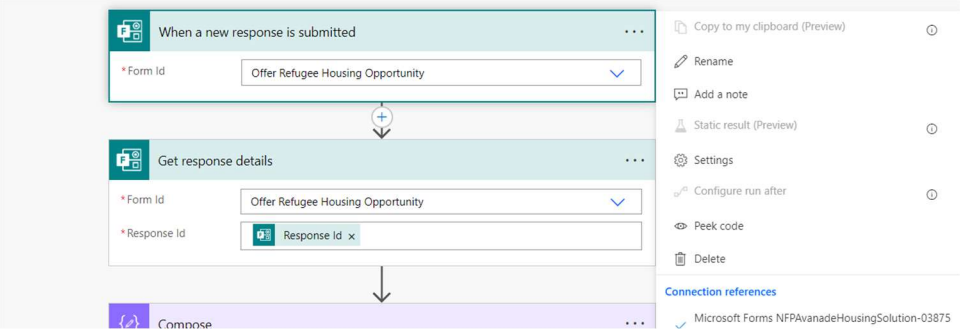



## 2. <u>Housing Form Submission</u>

**a)** Navigate to Housing Form Submission Flow and click on 'Edit'.

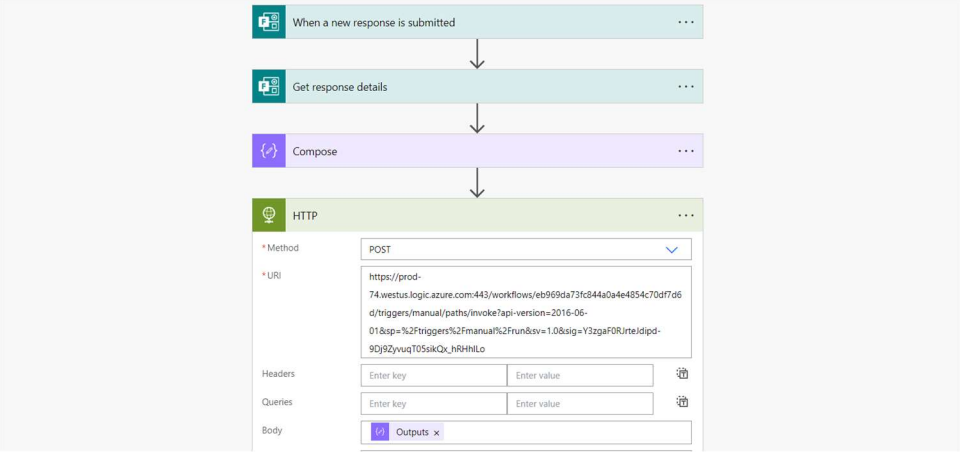



b) Ensure the connection references are set to the Microsoft Form Configured in earlier steps.

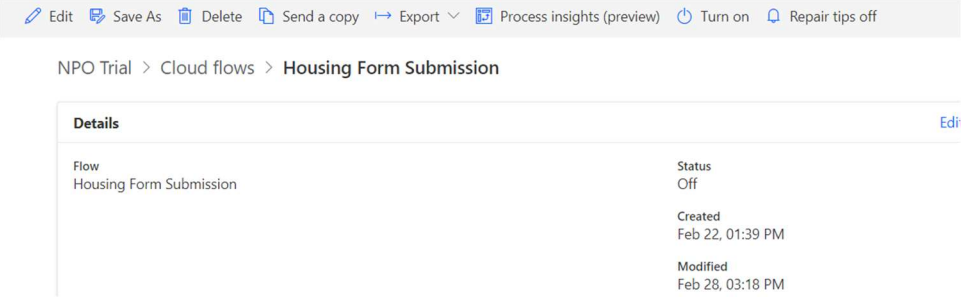



c) Save after right connection references and form are selected.

d) Update the HTTP Post URL noted from the "NFP Housing Service "Flow.

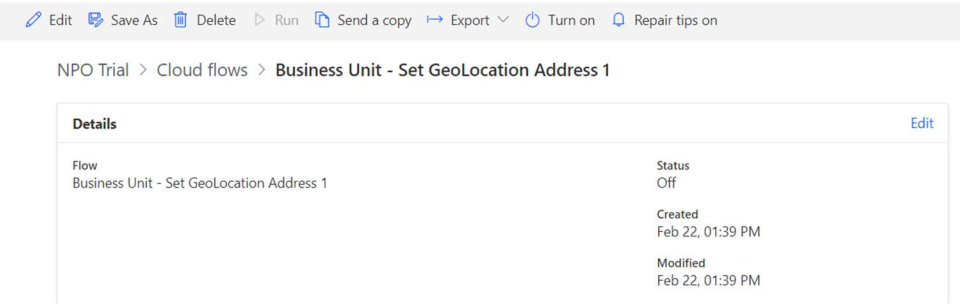



e) Turn On the flow. Your flow is now ready to use.

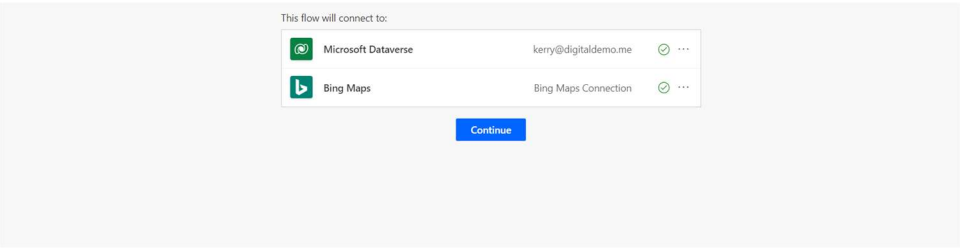



### 3. Business Unit – Set GeoLocation Address 1

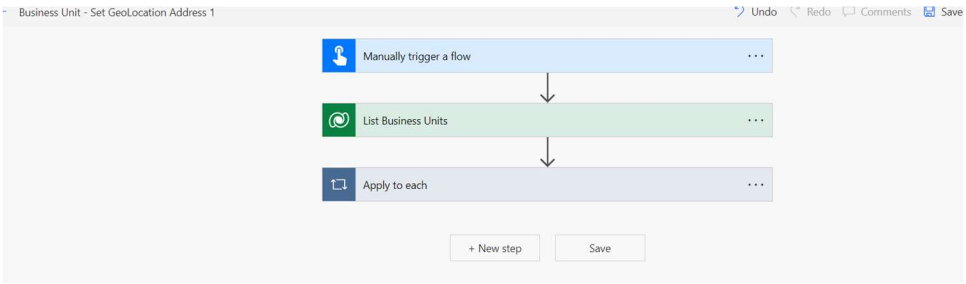
a) Navigate to Business Unit – Set GeoLocation Address 1 Flow and click on 'Edit'



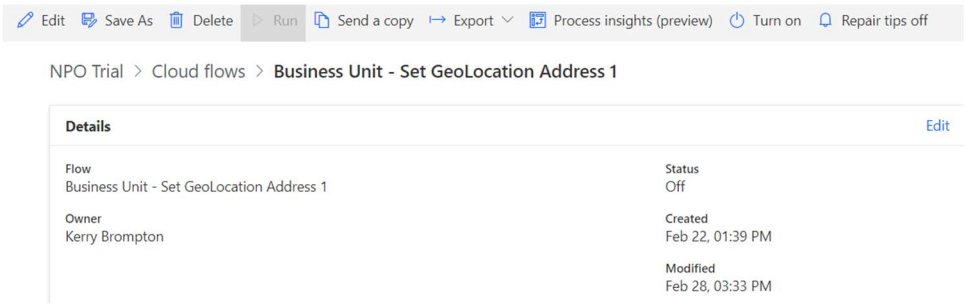

b) Ensure the Microsoft Dataverse and Bing Maps Connection references are configured as done for "Housing Service App".




c) Continue and Click on Save.

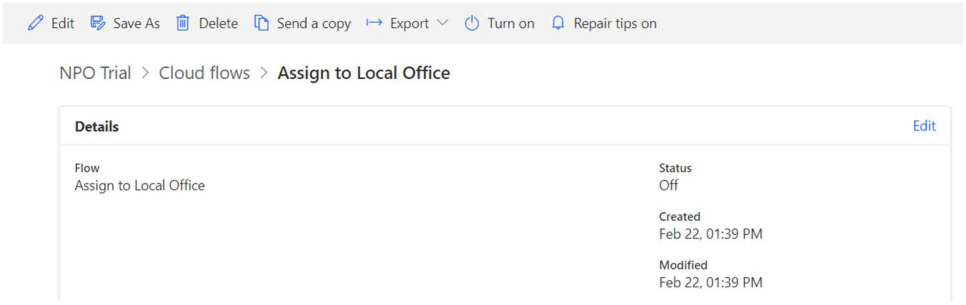



d) Turn on the Flow. Your flow is now ready to use.

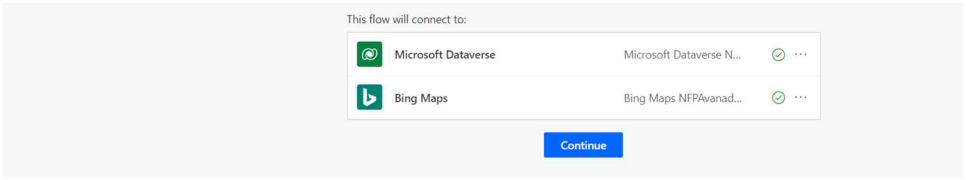



**4. <u>Assign to Local Office</u>**

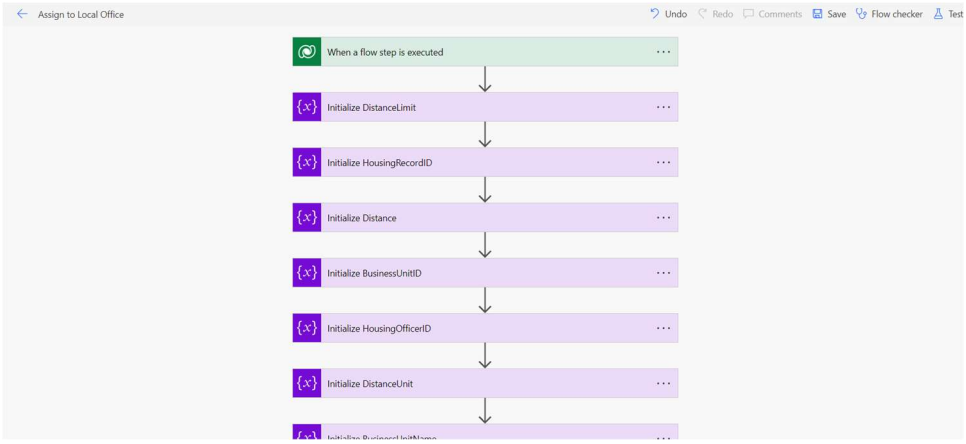
a) Navigate to Assign to Local Office Flow and click on 'Edit'



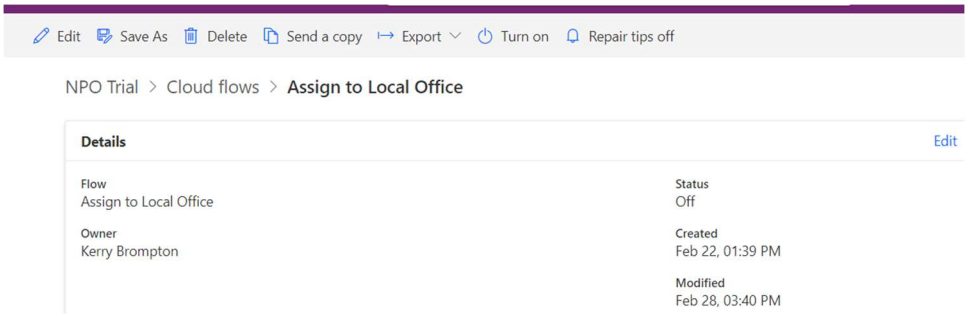

b) Ensure the Microsoft Dataverse and Bing Maps Connection references are configured as done for "Housing Service App".




c) Continue and Click on Save.

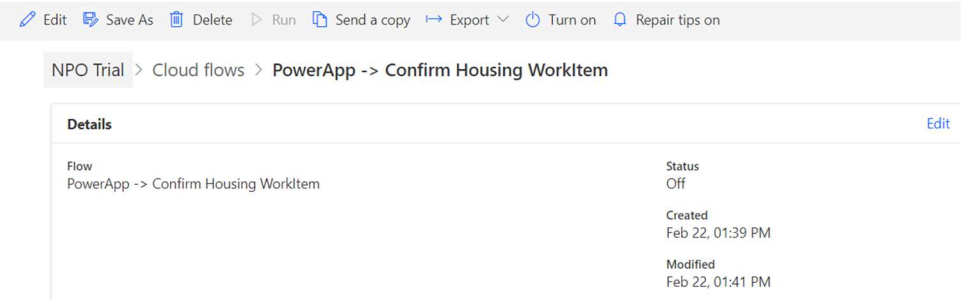



d) Turn on the Flow. Your flow is now ready to use.

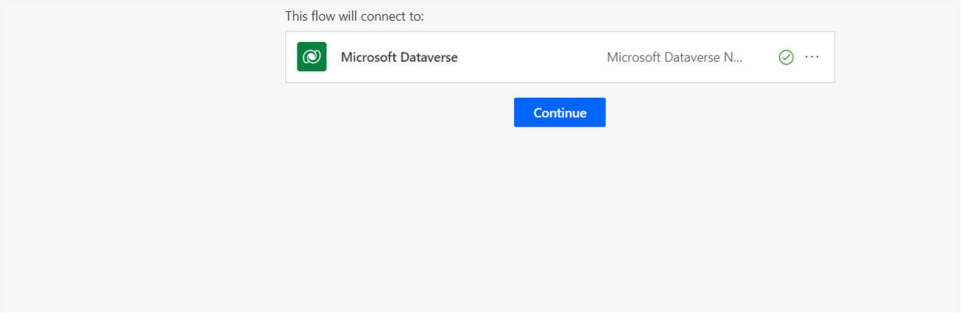



5. **<u>PowerApp -> Confirm Housing WorkItem</u>**

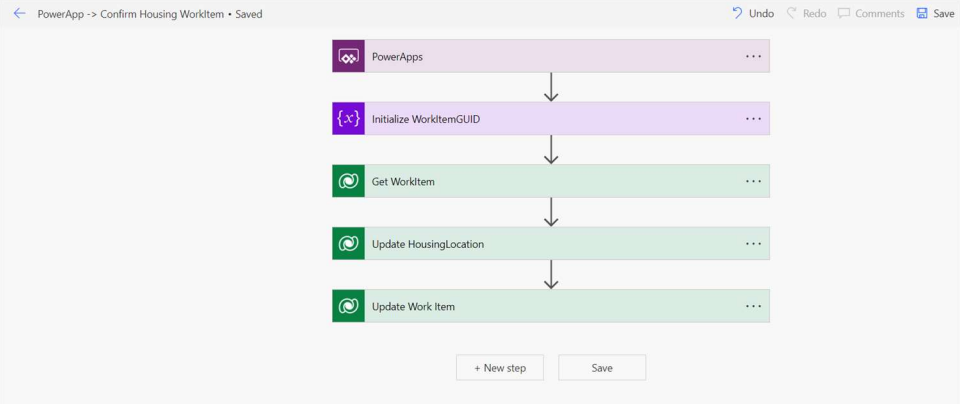
a) Navigate to PowerApp -> Confirm Housing WorkItem Flow and click on 'Edit'



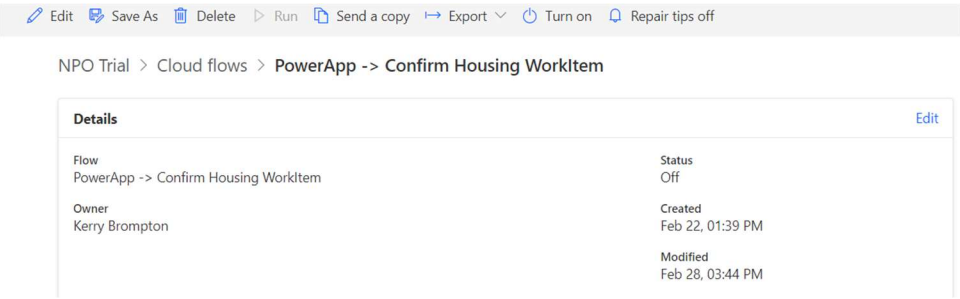

b) Ensure the Microsoft Data verse Connection reference is configured.




c) Continue and Click on Save.

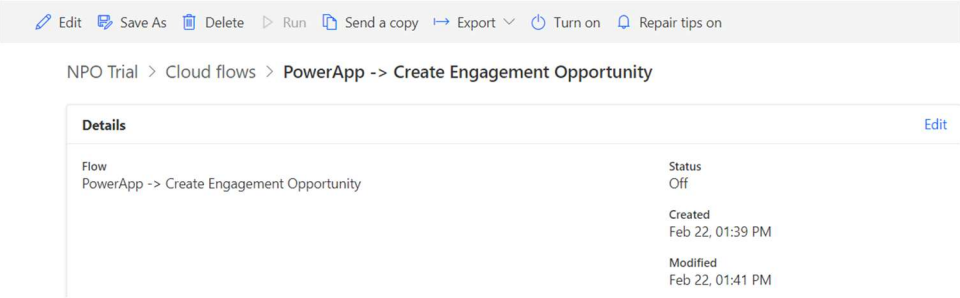



d) Turn on the Flow. Your flow is now ready to use.

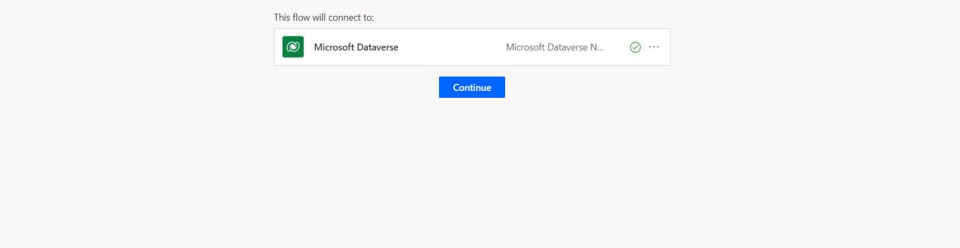



## 6. PowerApp -> Create Engagement Opportunity

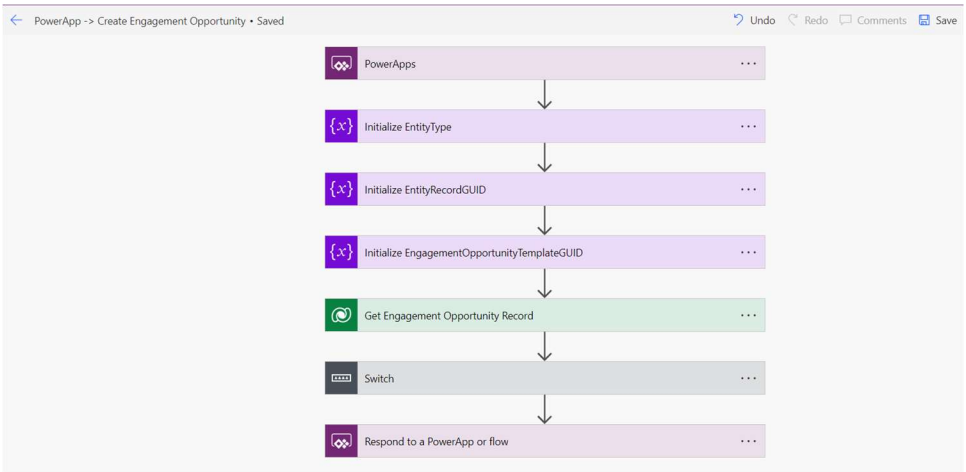
a) Navigate to PowerApp -> Create Engagement Opportunity Flow and click on 'Edit'



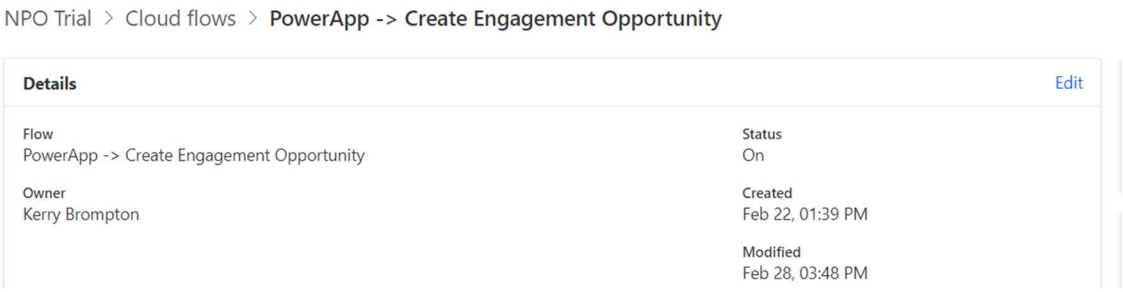

b) Ensure the Microsoft Dataverse Connection reference is configured.




c) Continue and Click on Save.

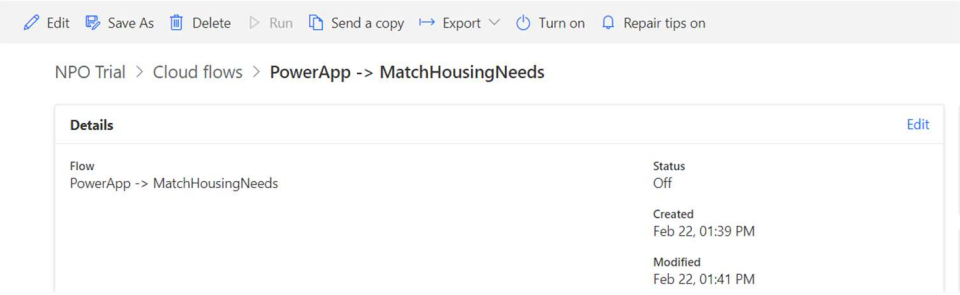



d) Turn on the Flow. Your flow is now ready to use.

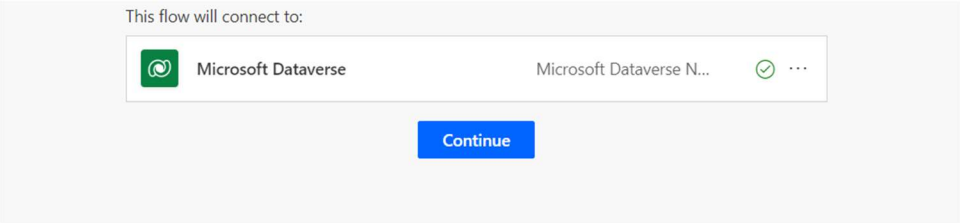



## 7. PowerApp -> MatchHousingNeeds

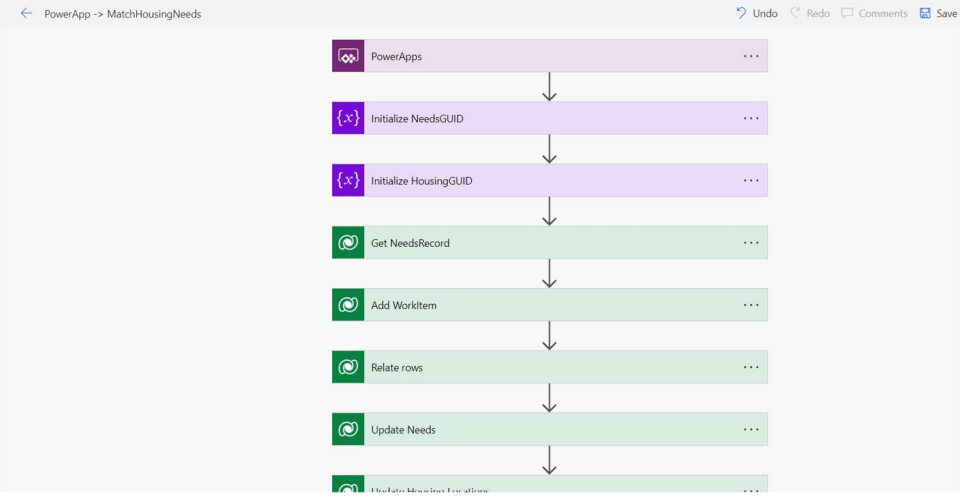
e) Navigate to PowerApp -> MatchHousingNeeds Flow and click on 'Edit'



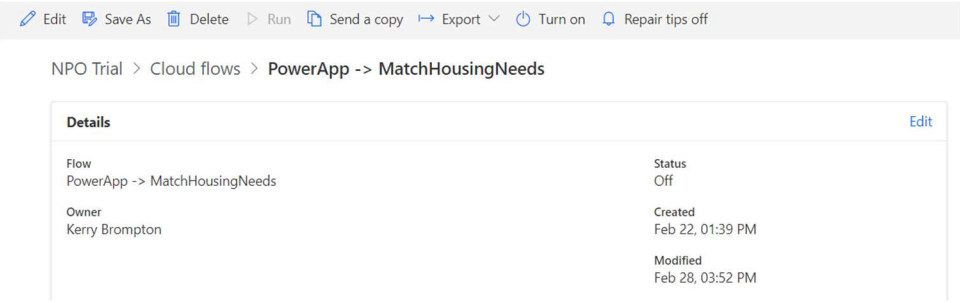

f) Ensure the Microsoft Dataverse Connection reference is configured




g) Continue and Click on Save.

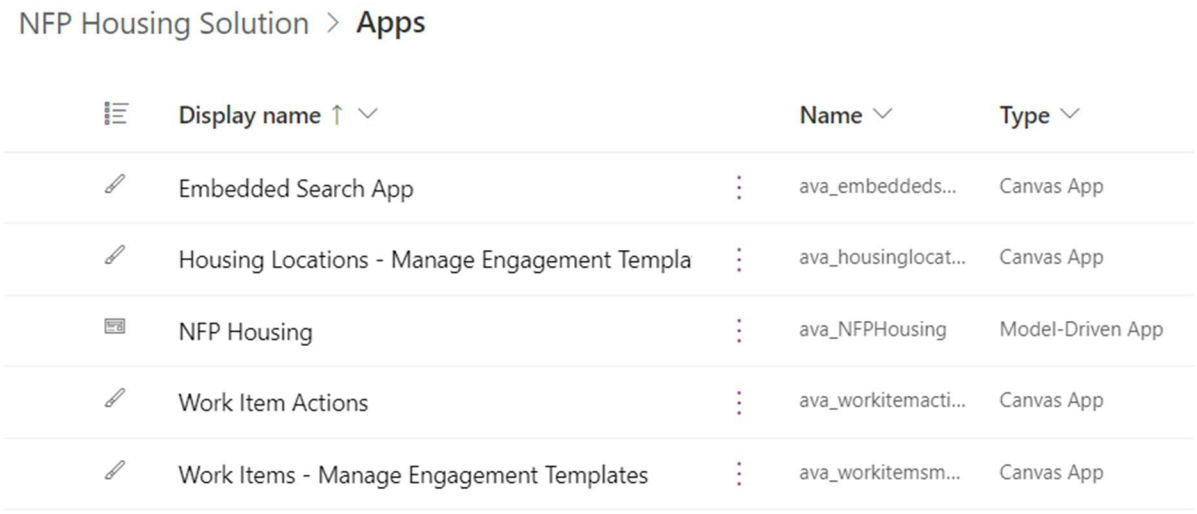



h) Turn on the Flow. Your flow is now ready to use.

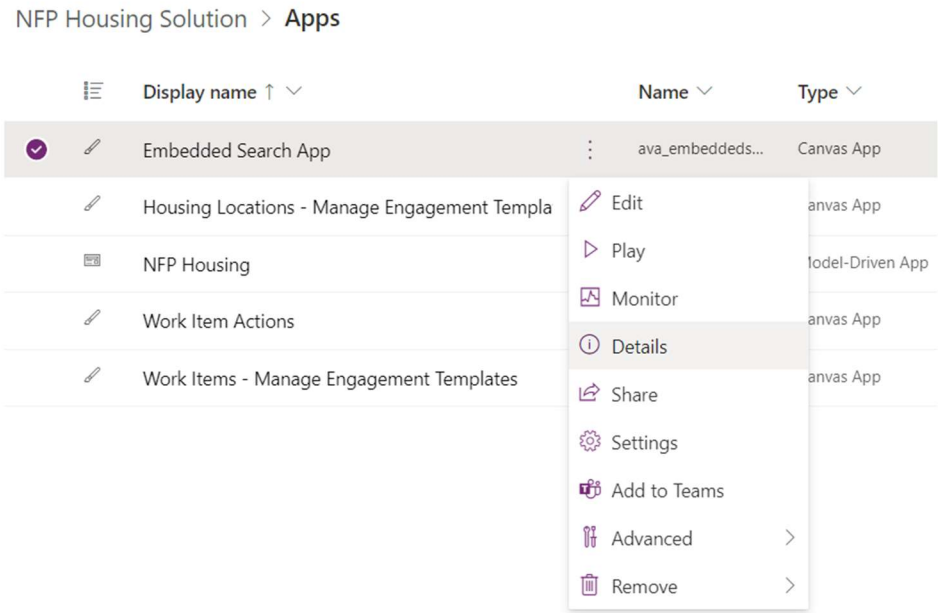


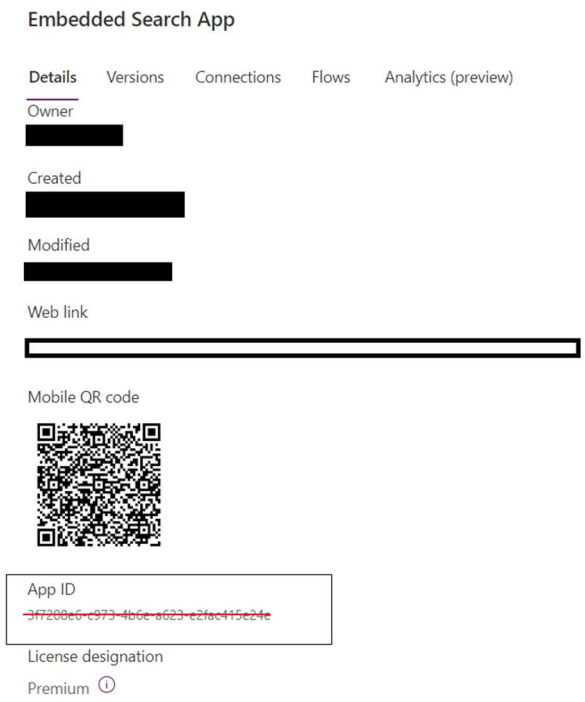

# Configuring the PowerApps

1. Verify the following apps should be present after installing the Housing solution:




2. Ensure the following forms using embedded canvas apps have their App Ids updated. To do that, navigate to each Canvas App in the list. Click on the three dots sign beside each app name and click on the details section (as shown in the image below) to get the App ID.
3. Record IDs for each of the canvas apps.






4. Navigate to the following forms and tabs to replace the App IDs present in the Canvas app controls recorded in the step above. You can edit them in the Customizations area or from another unmanaged solution.

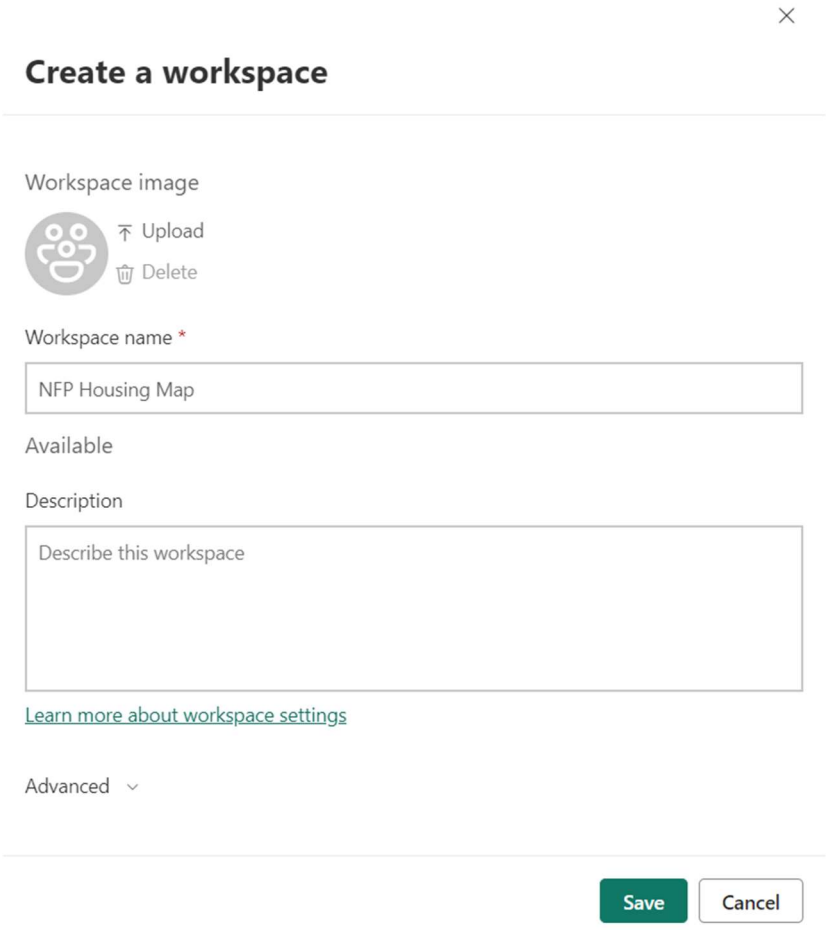
| App Name | Entity | Form - Tab |
|---|---|---|
| Embedded Search App | Need | Housing Need – Search for Housing |
| Housing Locations – Manage Engagement Template | Housing Location | Information Main Form – Engagement Tab – Quick Create Engagement Opportunity |
| Work Item Actions | Work Item | Housing Work Item – General Tab – Confirm Housing Location Field |
| Work Items – Manage Engagement Templates | Work Item | Housing Work Item – Engagement Tab – Quick Create Engagement Opportunity |

# Microsoft Forms Setup

Use this forms template link to create a copy of this sample Microsoft forms in your tenant which can then be rereferred in the Housing Submission Power Automate to collect answers about landlord and housing location.
https://forms.office.com/Pages/ShareFormPage.aspx?id=i0jEANYP8EiC0Hcr1G3wgyCT9xtRs1xKkBiDhDDBTfBUMFdORUlSRDFHOUdTT1VMV1ZYR0g5WVFRSS4u&sharetoken=5DWJn9e6HuRWl4gOGNVs

# Power BI Report & Dashboards Set Up

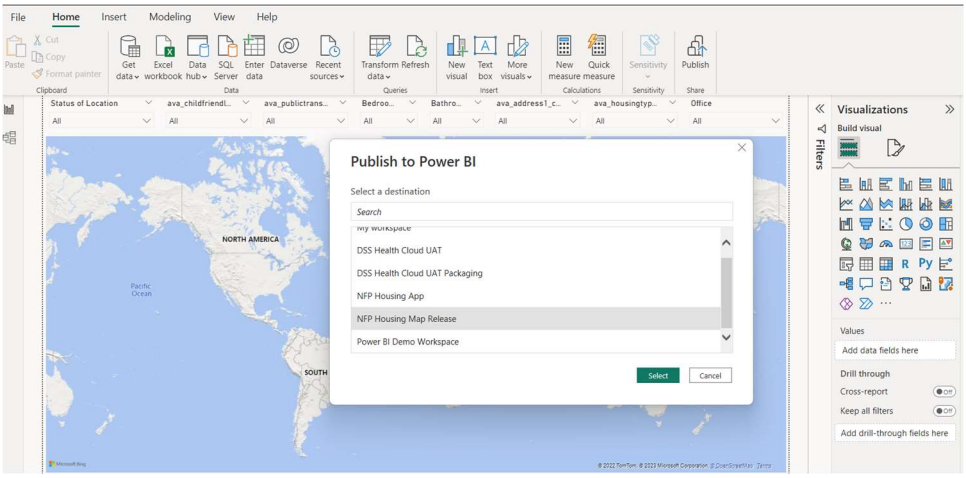
1. Download the Power BI template from this location [HousingAppAccelerator/NFP Housing Map.pbit at main · ava-innersource/HousingAppAccelerator (github.com)]
2. Navigate to app.powerbi.com and create a workspace.



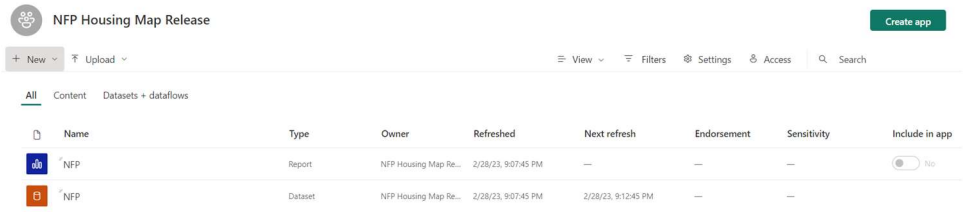

3. Open the template using Power BI Desktop. The user performing these actions should have power bi license attached.
4. As you open, you will be prompted to put the Target Environment URL. Please enter the organization's URL from which you would like the report to pull data. For example, *"yourenvname.crm.dynamics.com"*

5. Sign into the Target Environment URL specified in earlier step.

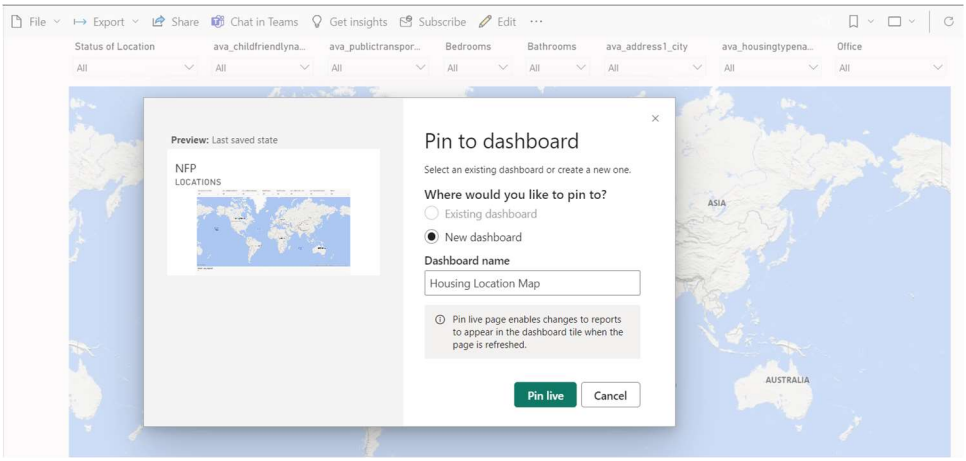
6. Sign into the Target Environment URL specified in earlier step. Once the report loads, publish the report to the workspace created earlier.



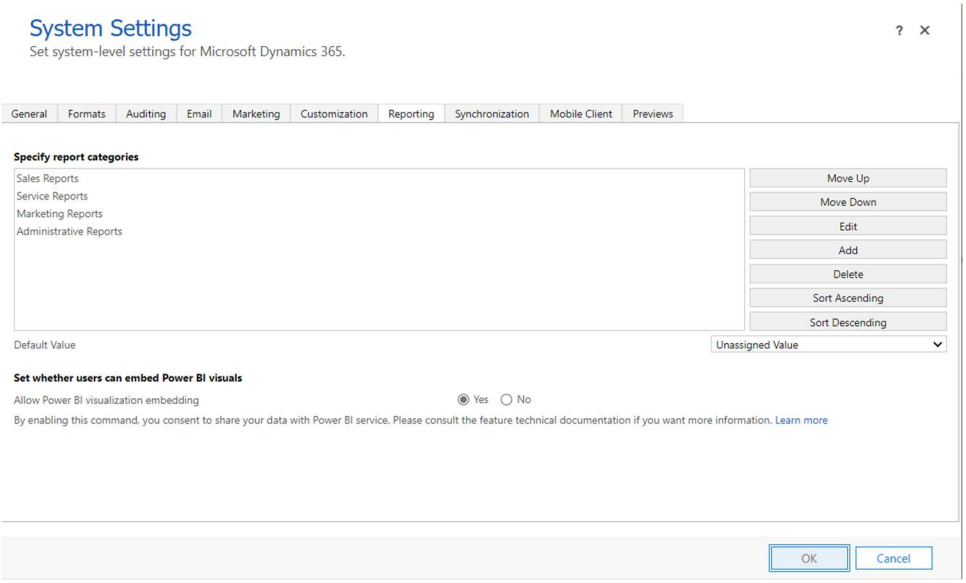

7. Once published, you should see the report and dataset in the workspace.



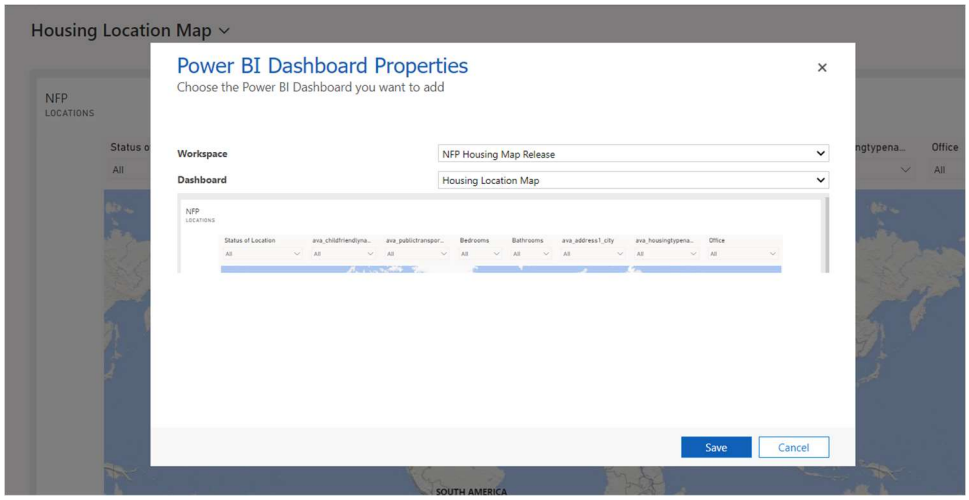

8. Select the dataset and make sure credentials provided are correct and connected.
9. Select the Report and "Pin to Dashboard". Give the dashboard a name.



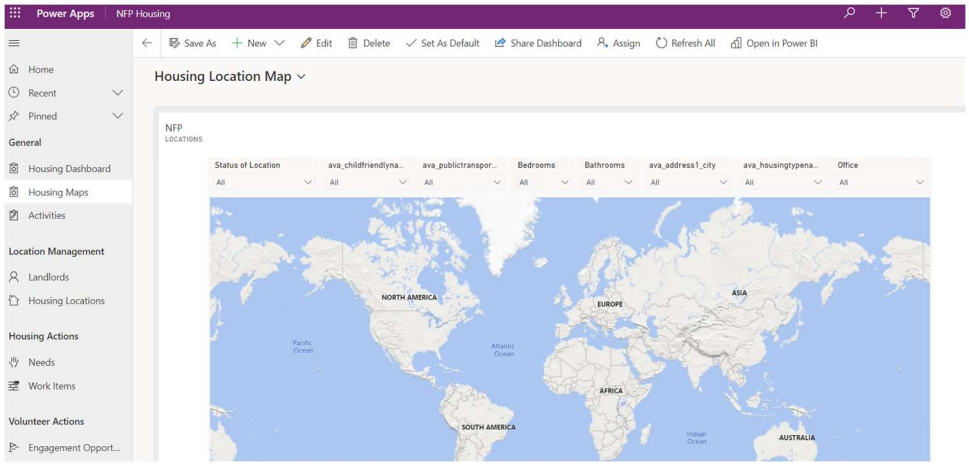

10. Log into the Dynamics 365 website, navigate to Settings > Administration > System Settings > Reporting tab, and under Set whether users can embed Power Bi visuals > Allow Power BI visualization Embedding, select Yes and click OK.




11. Navigate to the target environment URL and go to - > NFP Housing Model Driven App -> Dashboards - > Add a New Power BI Dashboard.




12. Select the newly created dashboard and workspace list. This will make the report available in the Dynamics environment.




# Post Deployment Record Level Settings

1. After all the deployment steps are completed. Navigate to the Business Unit records to set the "Housing Officer" details.
2. Ensure the correct address is populated on each business unit record.
3. Run the flow "Business Unit – Set GeoLocation Address 1" so that the geolocation is set up on each business unit record. This will be later used in Assigning the Housing location submitted to nearest local office.