

Housing App Accelerator Installation Guide

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Accelerator Release Version: v1.0

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Document purpose

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

Overview

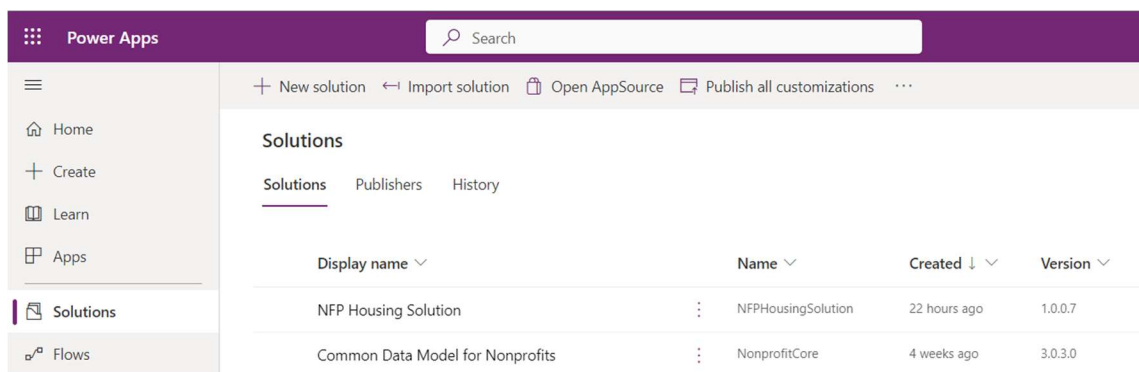
Prerequisites

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 referred in the Housing Submission Power Automate to collect answers about landlord and housing location.


















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<https://forms.office.com/Pages/ShareFormPage.aspx?id=i0jEANYP8EiC0Hcr1G3wgyCT9xtRs1xKkBiDhDDBTfBUMFdORUISRDFHOUdTT1VMV1ZYR0g5WVFRSS4u&sharetoken=5DWJn9e6HuRWl4gOGNVs>

Configuring the Flows (Power Automate)

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









NFP Housing Solution > Cloud flows

	Display name 		Name 	Type
	Assign to Local Office		Assign to Local ...	Cloud Flow
	Business Unit - Set GeoLocation Address 1		Business Unit - S...	Cloud Flow
	Housing Form Submission		Housing Form S...	Cloud Flow
	NFP Housing Service 		NFP Housing Ser...	Cloud Flow
	PowerApp -> Confirm Housing WorkItem		PowerApp -> Co...	Cloud Flow
	PowerApp -> Create Engagement Opportunity		PowerApp -> Cr...	Cloud Flow
	PowerApp -> MatchHousingNeeds		PowerApp -> Ma...	Cloud Flow

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. NFP Housing Service:

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

 Edit  Save As  Delete  Send a copy  Export  Process insights (preview)  Turn off  Repair tips off

NPO Trial > Cloud flows > NFP Housing Service

Details

Flow
NFP Housing Service

Owner
Kerry Brompton

Status
On

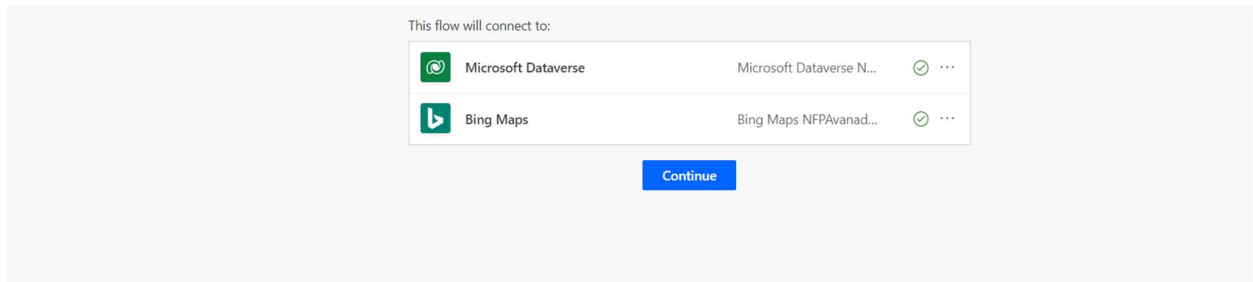
Created
Feb 22, 01:39 PM

Modified
Feb 28, 03:26 PM

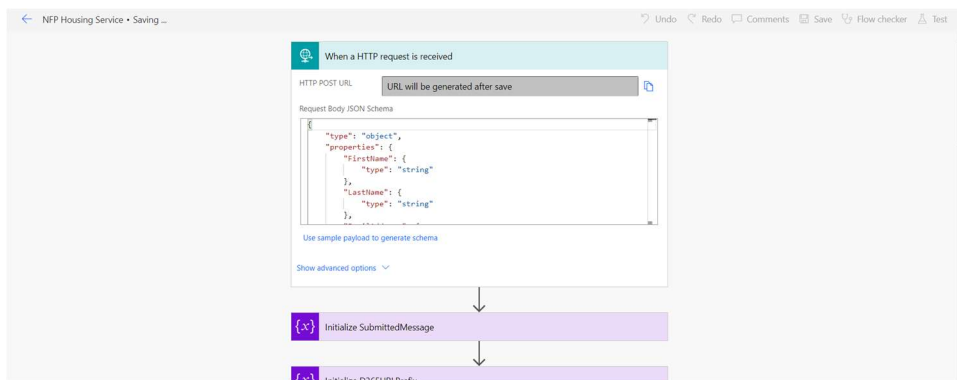
Edit

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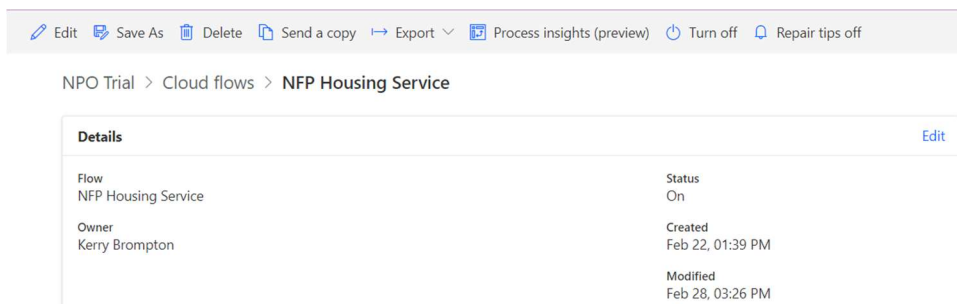
- b) Ensure there is a connection reference created for Dataverse and Bing Maps. You will need to get an API key for Bing maps connection.



- 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.



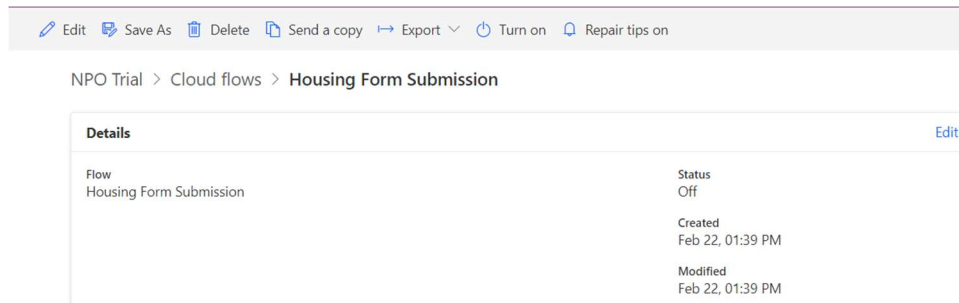
- d) Turn On the flow. Your flow is now ready to use.



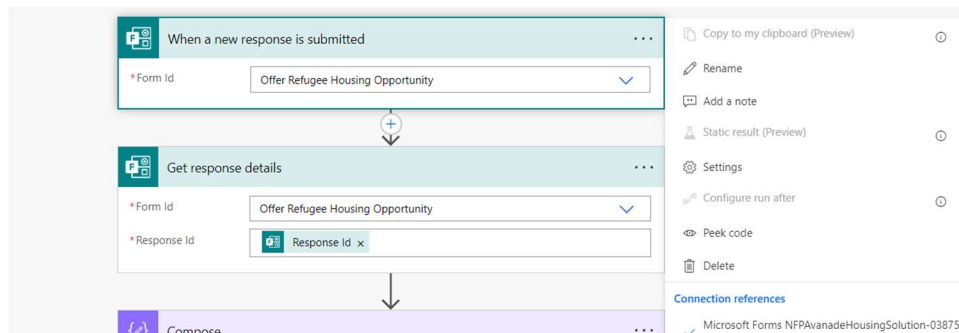
2. Housing Form Submission

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

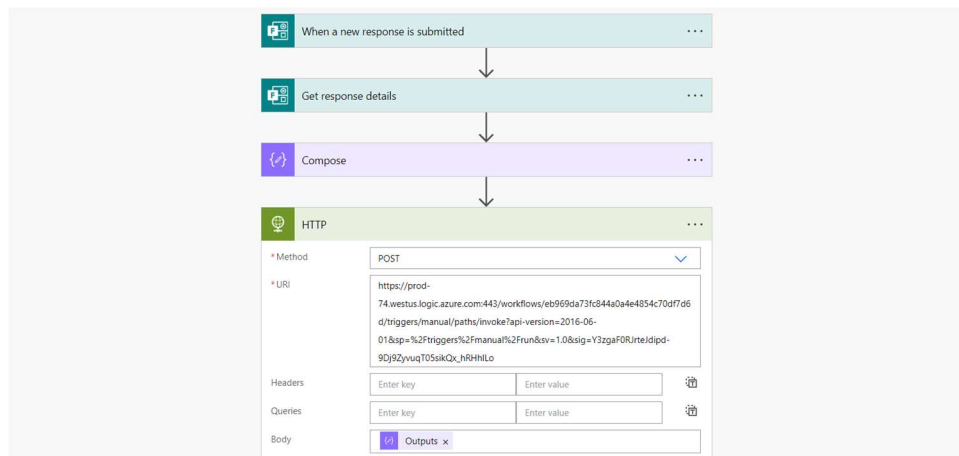
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- b) Ensure the connection references are set to the Microsoft Form Configured in earlier steps.

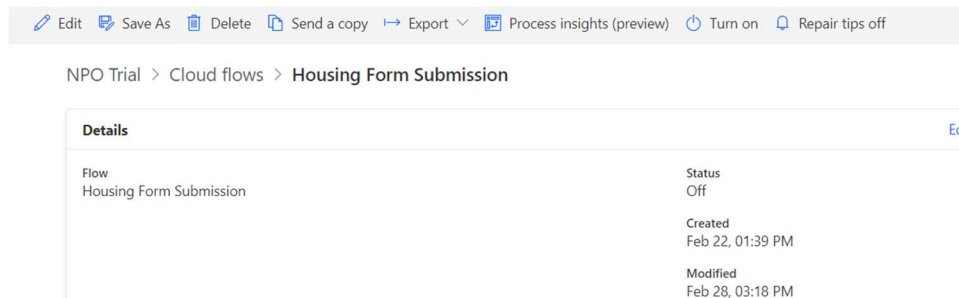


- c) Save after right connection references and form are selected.
d) Update the HTTP Post URL noted from the "NFP Housing Service "Flow.



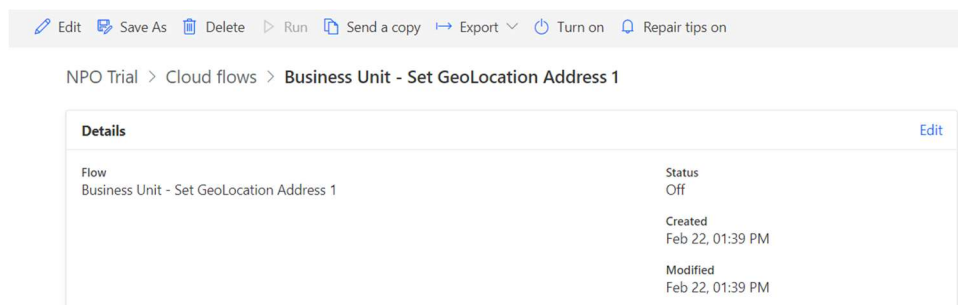
- e) Turn On the flow. Your flow is now ready to use.

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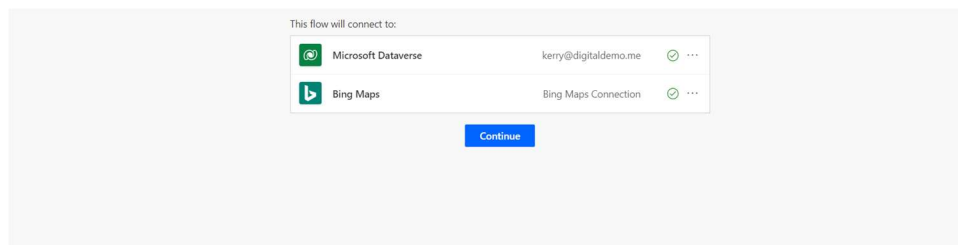


3. **Business Unit – Set GeoLocation Address 1**

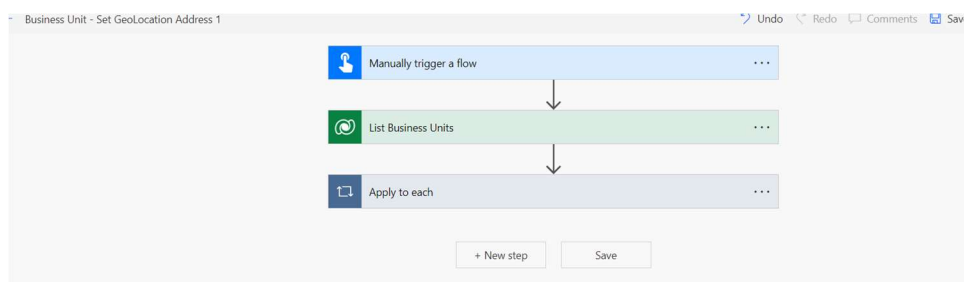
a) Navigate to Business Unit – Set GeoLocation Address 1 Flow and click on 'Edit'



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.

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✎ Edit 📄 Save As 🗑 Delete ▶ Run 📎 Send a copy ➡ Export 📊 Process insights (preview) ⏻ Turn on 🔔 Repair tips off

NPO Trial > Cloud flows > **Business Unit - Set GeoLocation Address 1**

Details [Edit](#)

Flow Business Unit - Set GeoLocation Address 1	Status Off
Owner Kerry Brompton	Created Feb 22, 01:39 PM
	Modified Feb 28, 03:33 PM

4. Assign to Local Office

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

✎ Edit 📄 Save As 🗑 Delete 📎 Send a copy ➡ Export ⏻ Turn on 🔔 Repair tips on



NPO Trial > Cloud flows > **Assign to Local Office**

Details [Edit](#)

Flow Assign to Local Office	Status Off
	Created Feb 22, 01:39 PM
	Modified Feb 22, 01:39 PM

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

This flow will connect to:

	Microsoft Dataverse	Microsoft Dataverse N...	✓ ...
	Bing Maps	Bing Maps NFPAvanad...	✓ ...

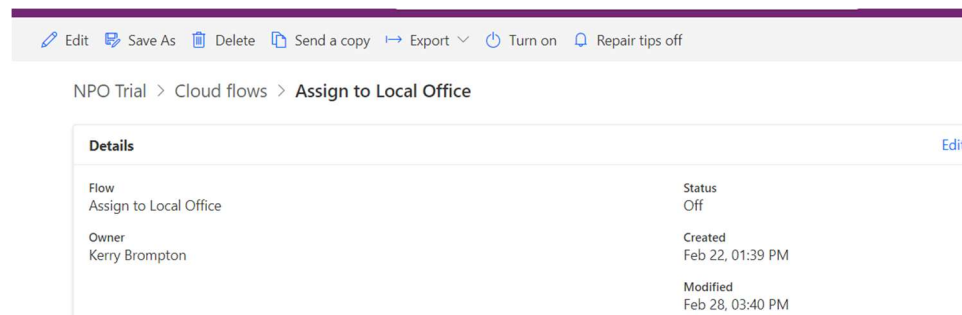
[Continue](#)

c) Continue and Click on Save.



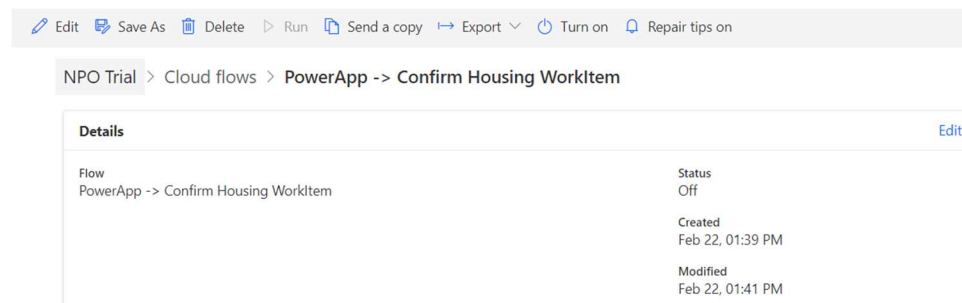
d) Turn on the Flow. Your flow is now ready to use.

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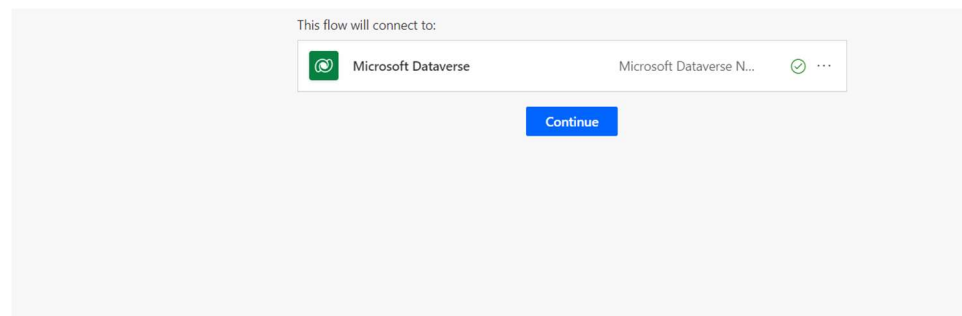


5. PowerApp -> Confirm Housing WorkItem

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

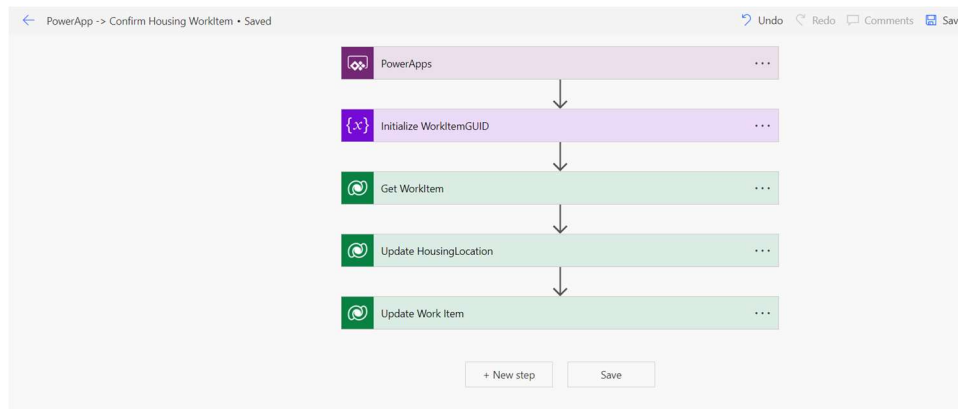


b) Ensure the Microsoft Data verse Connection reference is configured.



c) Continue and Click on Save.

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

Edit Save As Delete Run Send a copy Export Turn on Repair tips off

NPO Trial > Cloud flows > PowerApp -> Confirm Housing WorkItem

Details		Edit
Flow	PowerApp -> Confirm Housing WorkItem	Status Off
Owner	Kerry Brompton	Created Feb 22, 01:39 PM
		Modified Feb 28, 03:44 PM

6. PowerApp -> Create Engagement Opportunity

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



Edit Save As Delete Run Send a copy Export Turn on Repair tips on

NPO Trial > Cloud flows > PowerApp -> Create Engagement Opportunity

Details		Edit
Flow	PowerApp -> Create Engagement Opportunity	Status Off
		Created Feb 22, 01:39 PM
		Modified Feb 22, 01:41 PM

b) Ensure the Microsoft Dataverse Connection reference is configured.

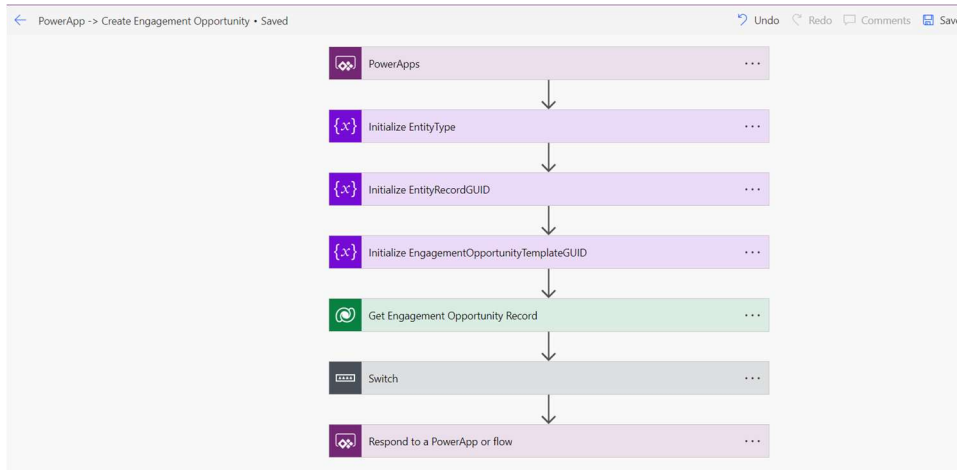
This flow will connect to:

 Microsoft Dataverse Microsoft Dataverse N... 

Continue

c) Continue and Click on Save.

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

NPO Trial > Cloud flows > **PowerApp -> Create Engagement Opportunity**

Details Edit	
Flow	Status
PowerApp -> Create Engagement Opportunity	On
Owner	Created
Kerry Brompton	Feb 22, 01:39 PM
	Modified
	Feb 28, 03:48 PM

7. **PowerApp -> MatchHousingNeeds**

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



Edit Save As Delete Run Send a copy Export Turn on Repair tips on

NPO Trial > Cloud flows > **PowerApp -> MatchHousingNeeds**

Details Edit	
Flow	Status
PowerApp -> MatchHousingNeeds	Off
	Created
	Feb 22, 01:39 PM
	Modified
	Feb 22, 01:41 PM

f) Ensure the Microsoft Dataverse Connection reference is configured

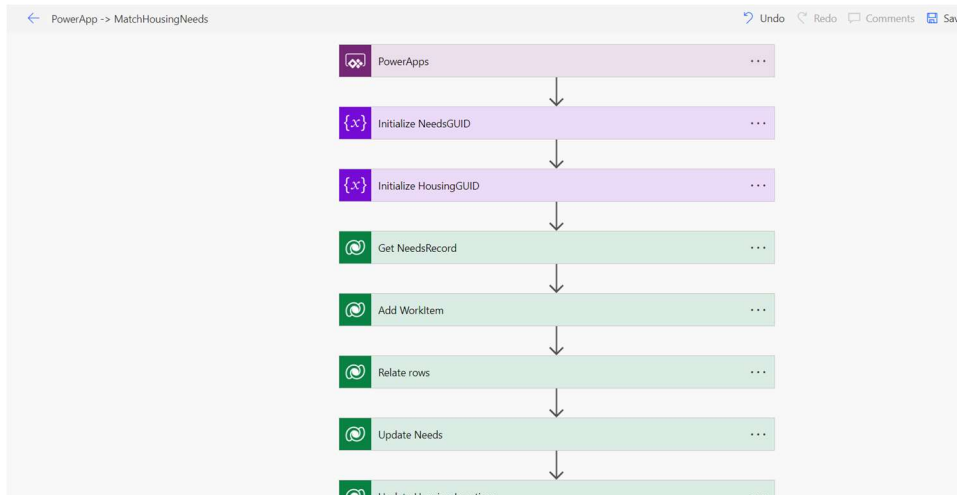
This flow will connect to:

 Microsoft Dataverse Microsoft Dataverse N... 

[Continue](#)

g) Continue and Click on Save.

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

Edit Save As Delete Run Send a copy Export Turn on Repair tips off

NPO Trial > Cloud flows > PowerApp -> MatchHousingNeeds











Details		Edit
Flow	PowerApp -> MatchHousingNeeds	Status Off
Owner	Kerry Brompton	Created Feb 22, 01:39 PM
		Modified Feb 28, 03:52 PM

Configuring the PowerApps

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

















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NFP Housing Solution > Apps

	Display name ↑ ↓		Name ↓	Type ↓
	Embedded Search App		ava_embeddedds...	Canvas App
	Housing Locations - Manage Engagement Templa		ava_housinglocat...	Canvas App
	NFP Housing		ava_NFPHousing	Model-Driven App
	Work Item Actions		ava_workitemacti...	Canvas App
	Work Items - Manage Engagement Templates		ava_workitemesm...	Canvas App

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.

NFP Housing Solution > Apps

	Display name ↑ ↓		Name ↓	Type ↓
	 Embedded Search App		ava_embeddedds...	Canvas App
	Housing Locations - Manage Engagement Templa	 Edit		Canvas App
		 Play		Model-Driven App
	NFP Housing	 Monitor		Canvas App
	Work Item Actions	 Details		Canvas App
	Work Items - Manage Engagement Templates	 Share		Canvas App
		 Settings		
		 Add to Teams		
		 Advanced		>
		 Remove		>

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Embedded Search App

Details Versions Connections Flows Analytics (preview)

Owner



Created



Modified



Web link



Mobile QR code



App ID

3f7200e6-c973-4b6e-a623-e2f8c415e24e

License designation

Premium ⓘ

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

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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=i0jEANYP8EiC0Hcr1G3wgyCT9xtRs1xKkBiDhDDBTfBUMFdORUISRDFHOUdTT1VMV1ZYR0g5WVFRSS4u&sharetoken=5DWJn9e6HuRWI4gOGNVs>


Power BI Report & Dashboards Set Up

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

×

Create a workspace

Workspace image



Upload

Delete

Workspace name *

NFP Housing Map

Available

Description

Describe this workspace

[Learn more about workspace settings](#)

Advanced ▾

Save

Cancel

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"

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Power BI Template for available housing location map

TargetEnvironmentURL

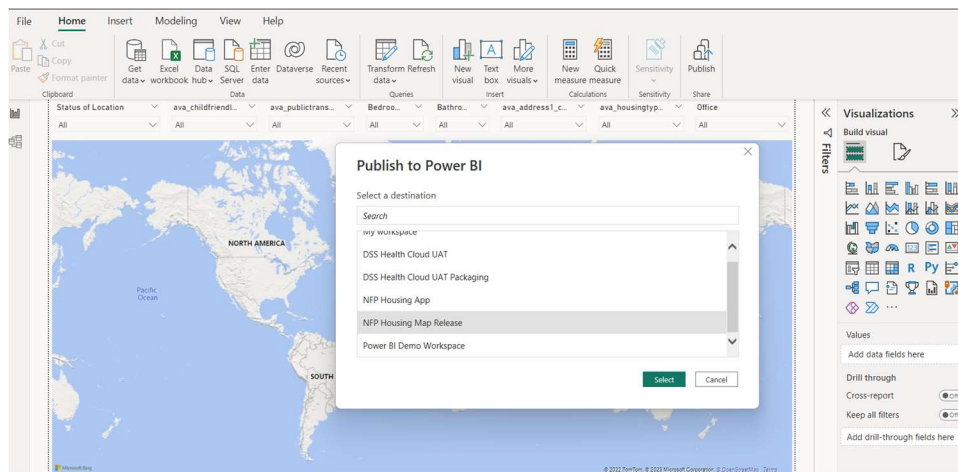
Load

Cancel

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

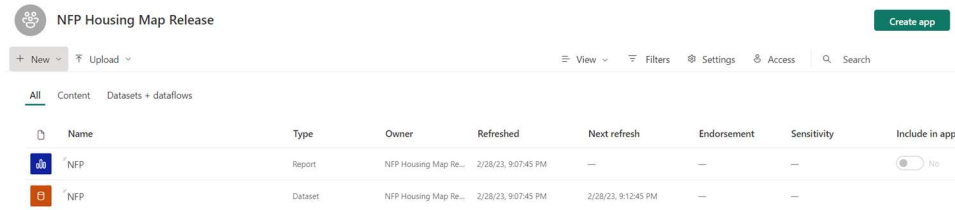


6. Sign into the Target Environment URL specified in earlier step. Once the report loads, publish the report to the workspace created earlier.

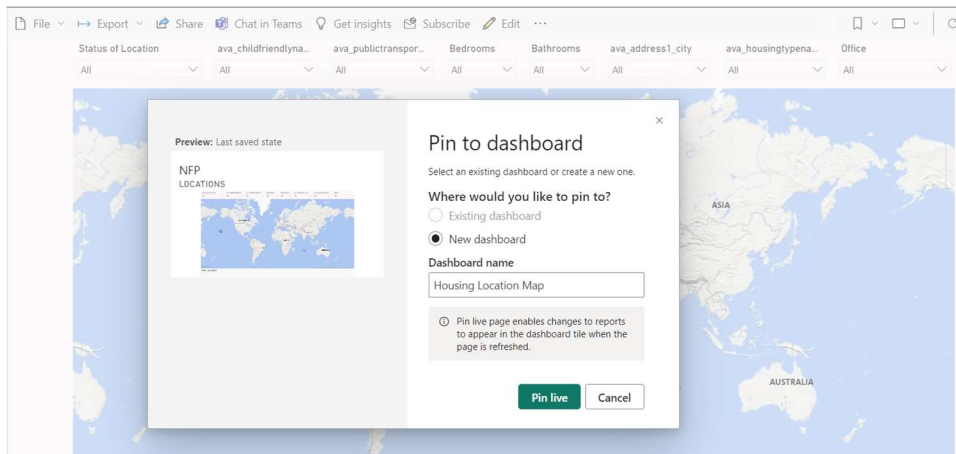


7. Once published, you should see the report and dataset in the workspace.

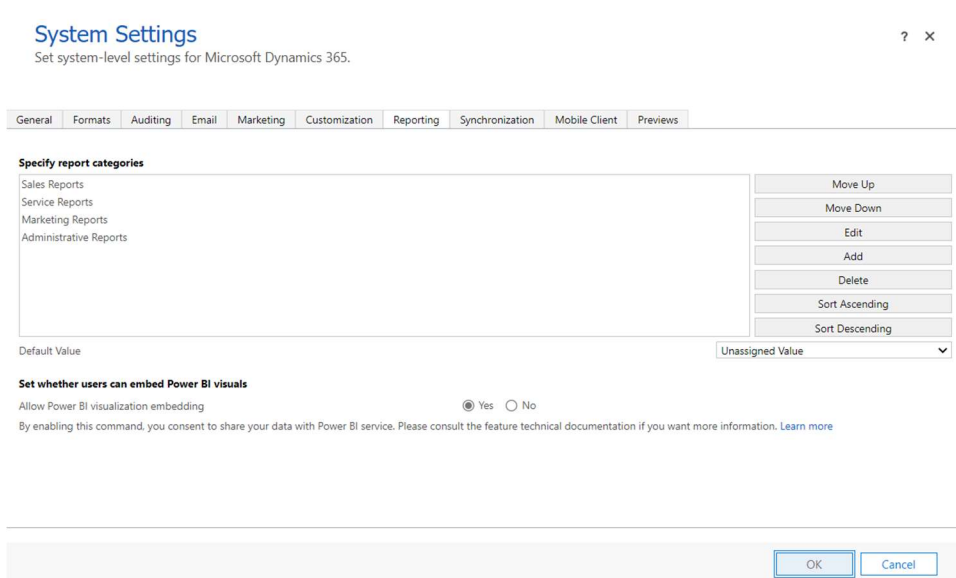
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8. Select the dataset and make sure credentials provided are correct and connected.
9. Select the Report and "Pin to Dashboard". Give the dashboard a name.

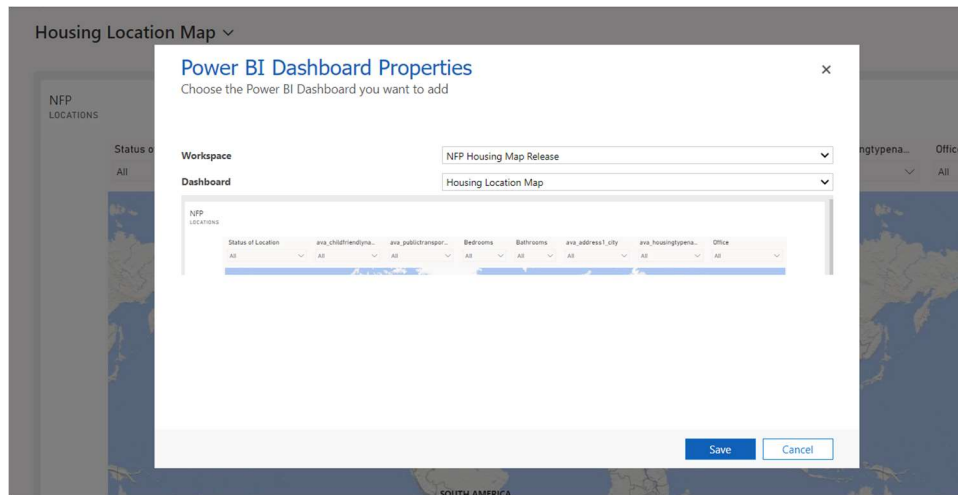


10. Log into the Dynamics 365 website, navigate to Settings > Administration > System Settings > Reporting tab, and under Set whether users can embed Power BI visuals > Allow Power BI visualization Embedding, select Yes and click OK.

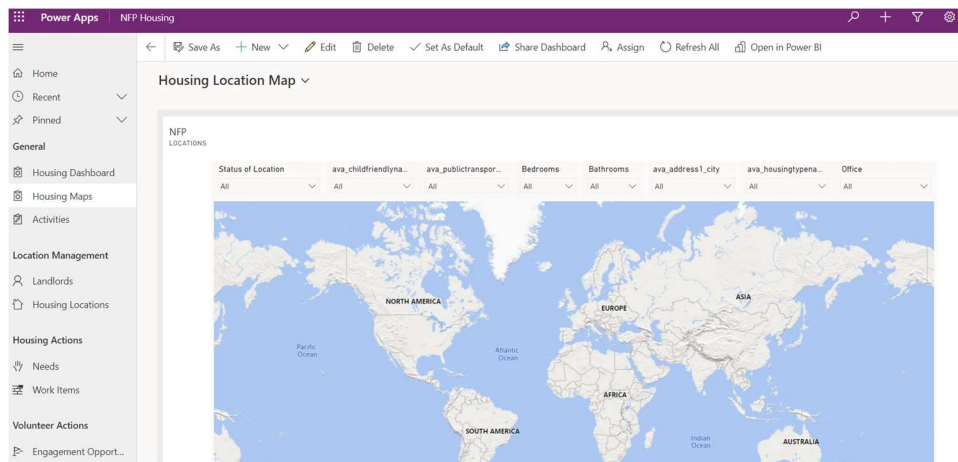


11. Navigate to the target environment URL and go to - > NFP Housing Model Driven App -> Dashboards - > Add a New Power BI Dashboard.

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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.

