

## Contents

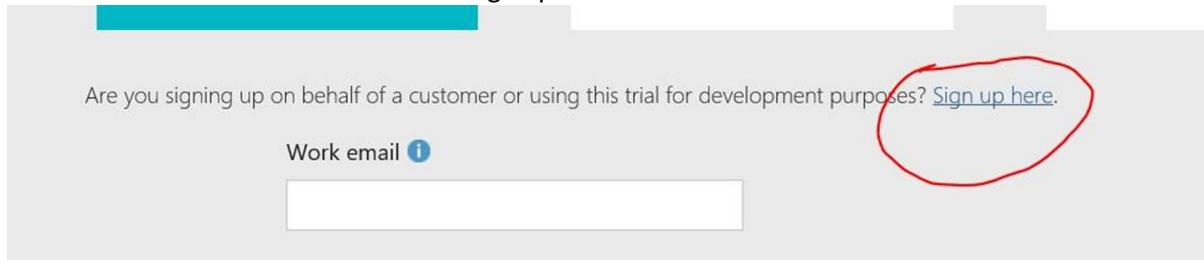
Prerequisites .....	1
Introduction .....	3
Business Case .....	3
The Solution .....	3
Core Solution Components .....	4
Lab 2: Data & Common Data Service (CDS) - Mandatory .....	4
Solution Components .....	4
Let's Begin .....	5
Lab 3: Configuring Forms, Views & Charts in the CDS .....	15
Solution Components .....	15
Let's Begin .....	16
Form Configuration .....	17
View Configuration .....	20
Charts Configuration .....	23
Lab 4: Configuring your Business Process Flow and Model Driven App experience .....	28
Solution Components .....	28
Let's Begin .....	29
Business Process Flow.....	29
Model Driven Application .....	37
Dashboards .....	44
Lab 5: Testing .....	55
Solution Components .....	55
Let's Begin .....	56
PowerApps Model-driven App.....	56
Final Learnings .....	56

## Prerequisites

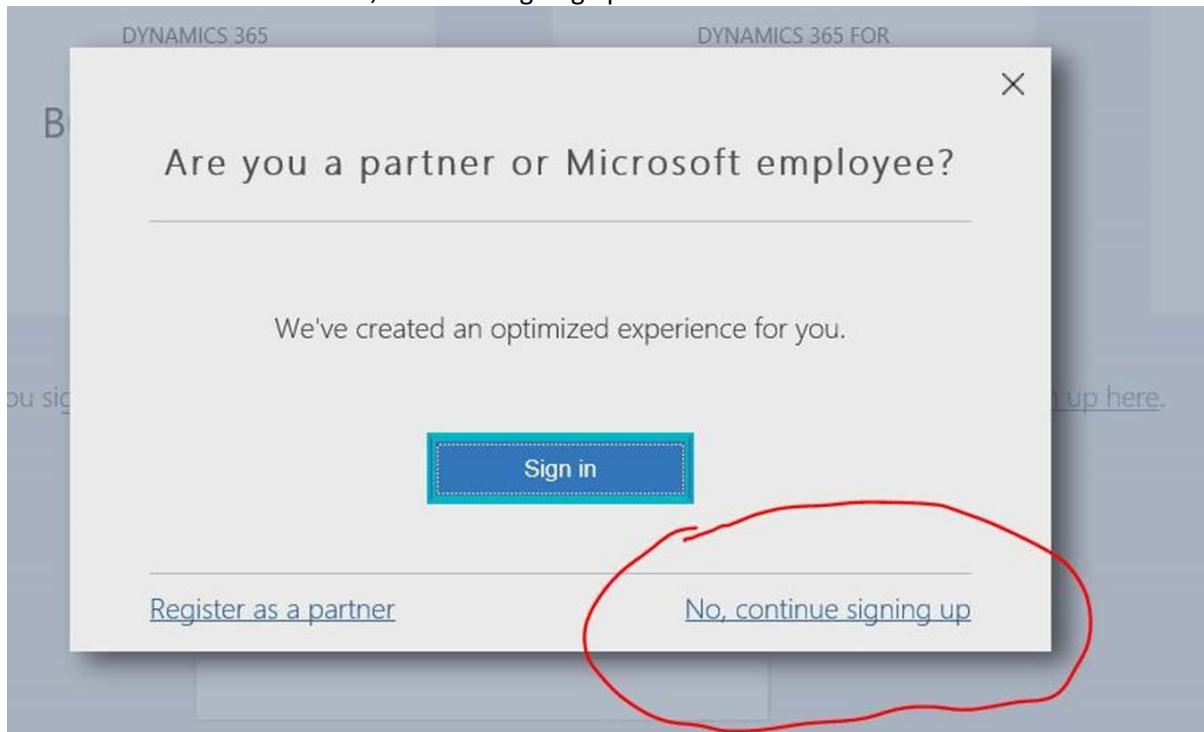
To complete this workshop, you will need to do the following:

Download the HackPacks here: [AKA.ms/HackAtSpeed](#) – Look for the Model Driven App Training folder in the Hack Packs Folder.

1. Have an active PowerApps trial with the ability to create new Common Data Service environments. To do this, start the process as follows:
  - a. “Trials.Dynamics.com” in an IN PRIVATE / INCOGNETO browser window with NO other browser windows open.
  - b. Scroll down and click “Sign up here”



- c. Then click “No, Continue Signing up”



- d. Follow the instructions...
2. To create a new CDS Trial environment click [HERE](#). This can be done from ANY existing tenant (Preferably from the one generated above)
3. Download Power BI Desktop to your local machine. This can be done by simply going to the Microsoft Store and searching for Power BI Desktop.



## Power BI Desktop

Microsoft Corporation • Business > Data & analytics

★★★★★ 23 Share

Power BI Desktop puts visual analytics at your fingertips. With this powerful authoring tool, you can create interactive data visualizations and reports.

More



PEGI 3

- 
4. Download the “Prospects” Excel File from the following Location [HERE](#).

## Introduction

Welcome to “Model Driven Apps in a Day” This walk through is designed to take you through various Model Driven areas of the Power Platform in order to help you understand how it all fits together in a very short amount of time. The document may appear long, however there are Multiple Screen shots that will help you run through the material.

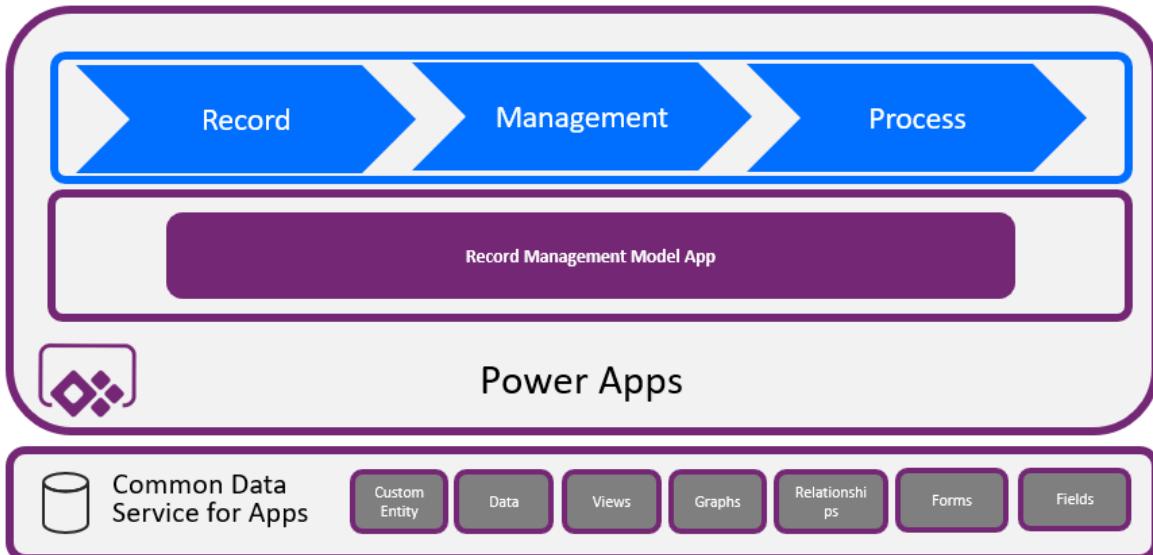
## Business Case

We are an organisation focused on collecting information about Prospects via the phone and want to be able to manage these prospects through to final completion and qualification contact.

- We want to store our data in a SINGLE, RELIABLE, SECURE source that is accessible through multiple applications.
- I want to be able to import data from my Excel data sources to the CDS.
- We want to have a great internal mid office application that will enable us to view all of the data clearly as well as interact with the relevant records from a collaborative perspective.
- We want to be able to manage the prospects through a “Management Process” to make sure that each record is logged correctly and accurately.

## The Solution

To help said organisation solve this problem and provide a great amount of value within a simple, single implementation, the following design has been decided on:



## Core Solution Components

The core focus areas of this course will be as follows:

1. **Power Query:** Used to import data from the core Excel list sent to the regional office as a starting point.
2. **The Common Data Service:** Will act as the core Data Storage mechanism to hold and manage the prospect data.
3. **Power Apps (Model Driven Apps):** The mid office will leverage a model driven app to interact with the prospect and help control the process.
4. **Business Process Flows:** The mid office user will need to manage the prospect through to completion by running through the visible business process flow on the model driven application form.

## Lab 2: Data & Common Data Service (CDS) - Mandatory

We will start off by bringing in the Excel data structure into the Common Data service (CDS) by leveraging Data Flows within the CDS and Power Query. This is important and will create the basis for the model Driven App later on in the process. Data is very key and needs to be managed properly.

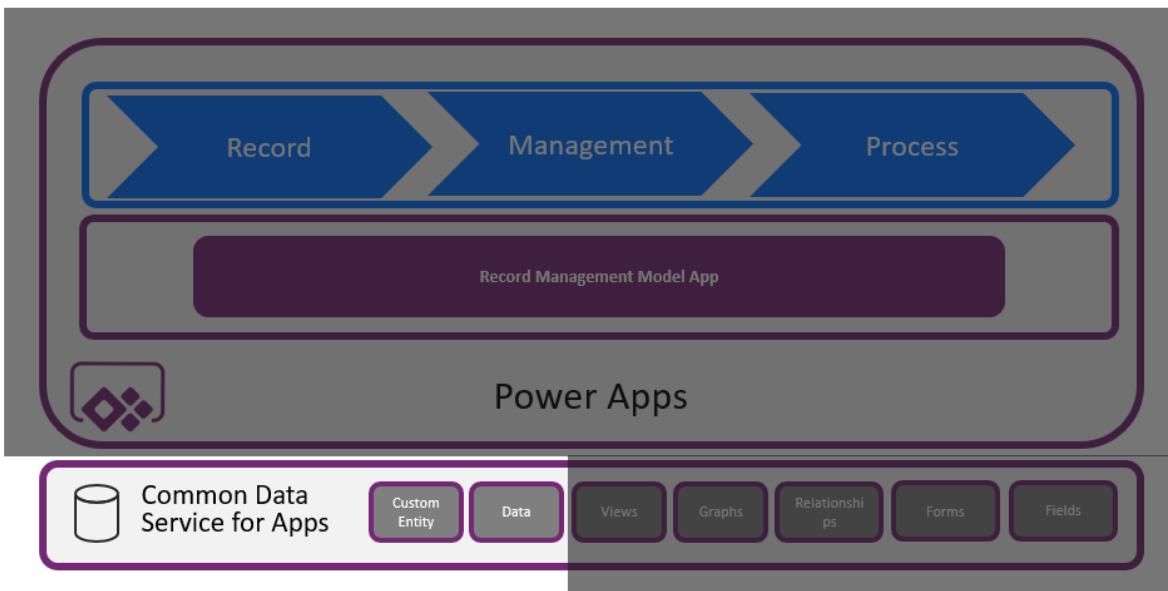
### Please Note:

**This Part of the Hackathon is mandatory as all other elements of the solution rely on the data being in the Common Data Service (CDS)**

### Solution Components

Microsoft Power Query

The Common Data Service (CDS)



## Let's Begin

Navigate to [make.PowerApps.Com](https://make.powerapps.com) and make sure you are in the environment that you created in the Prerequisites. You MUST NOT be in the “Default Environment”, you must be in the environment that you added.

The screenshot shows the Power Apps home page with a red arrow pointing upwards from the "Data" section towards the "Management" section of the main navigation bar.

**Build business apps, fast**

Create apps that connect to your data and work across web and mobile. [Learn about Power Apps](#)

**Make your own app**

- Canvas app from blank (Canvas app)
- Model-driven app from blank (Model-driven app)
- Portal from blank (Portal)

[All templates →](#)

**Start from data**

- SharePoint
- Excel Online
- SQL Server
- Common Data Services
- Other data sources

**Your apps**

Select DataFlows (May say Data Integrations)

Screenshot of the Power Apps Dataflows page:

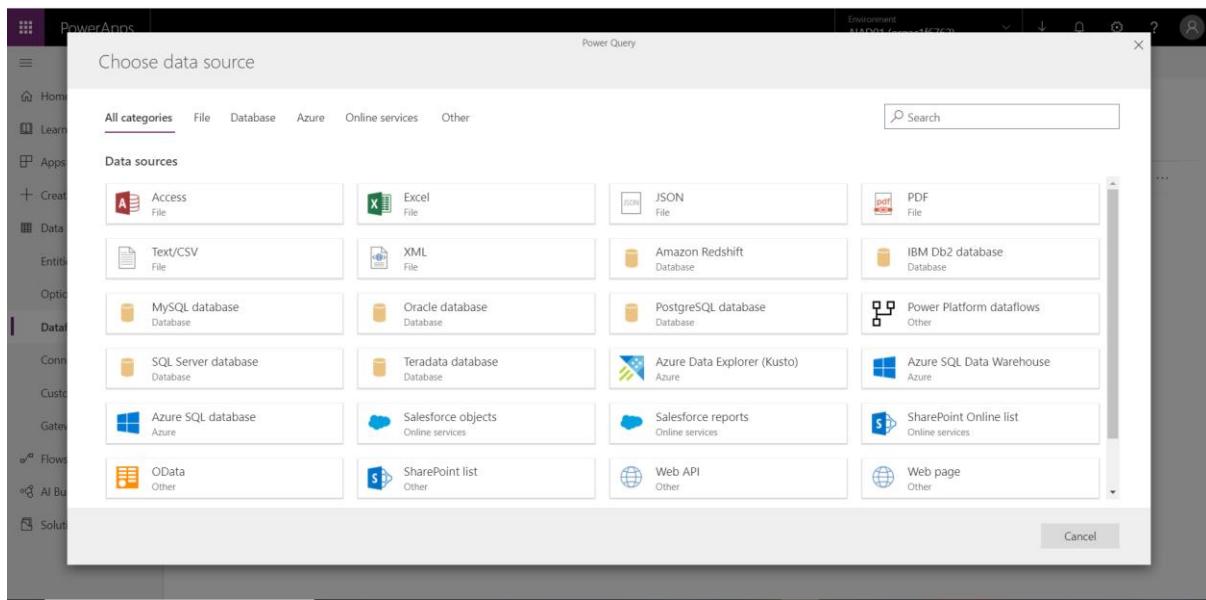
- Left Sidebar:**
  - Home
  - Learn
  - Apps
  - Create
  - Data
    - Entities
    - Option Sets
  - Dataflows**
  - Export to data lake
  - Connections
  - Custom Connectors
  - Gateways
  - Flows
  - AI Builder
  - Solutions
- Top Bar:** Environment STUFF02, Notifications, Help, CH
- Header:** + New dataflow
- Section:** Dataflows
- Table:**| Name | Type | Last Refresh | Next Refresh |
| --- | --- | --- | --- |
| AWESOMENESS | Standard | N/A | N/A |
| Asset Incident Management | Standard | N/A | N/A |
| CG Compl | Standard | N/A | N/A |
| CG Import | Standard | N/A | N/A |
| Complaints | Standard | N/A | N/A |
| Complaints Main | Standard | N/A | N/A |
| ComplaintsV3 | Standard | N/A | N/A |
| ComplaintsV6 | Standard | N/A | N/A |
| Leads | Standard | N/A | N/A |
| Project1 | Standard | N/A | N/A |
| Project2 | Standard | N/A | N/A |
| Project3 | Standard | N/A | N/A |

Create a New Dataflow and call it “Prospects”.

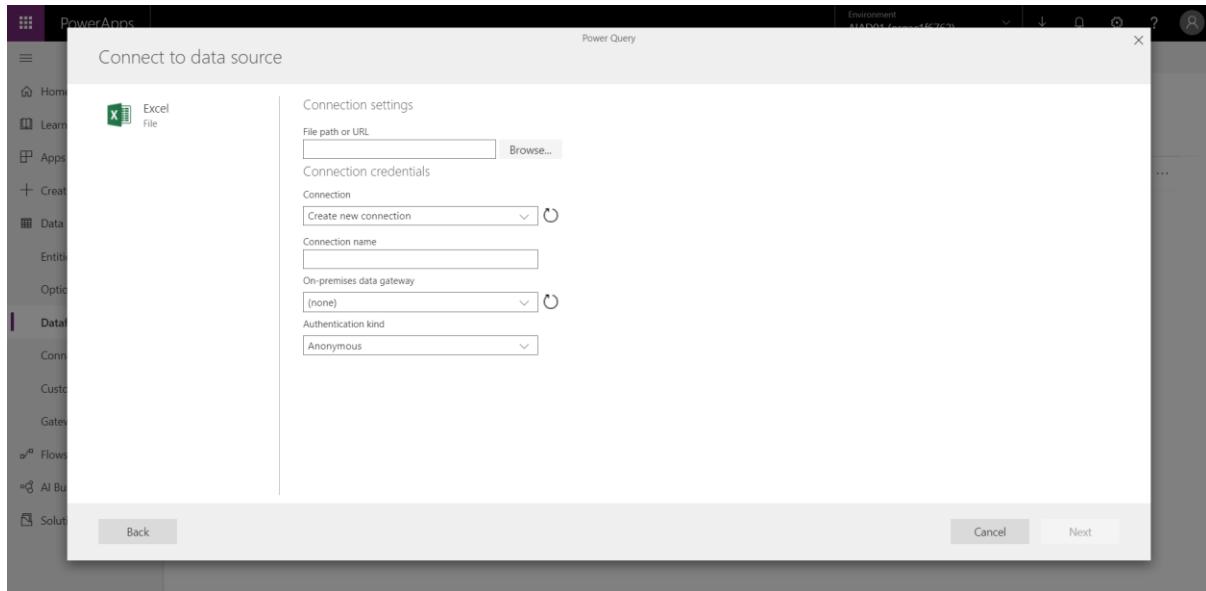
Screenshot of the New Dataflow creation dialog:

- Title:** New Dataflow
- Diagram:** Shows a central data transformation icon connected to a database cylinder on the left and three data source icons (Email, Person, Cloud) on the right, each with a plus sign to add more sources.
- Form Fields:**
  - Name \***: Prospects
  - Options**:  Analytical entities only
- Text:** Dataflows allow users to extract, transform and load data from a wide range of data sources that can be used from Power Apps, Flow and analytics. [Learn more](#)
- Buttons:** Create (highlighted), Cancel
- Footer:** Standard, 11/4/2019, 9:42:46 PM, N/A

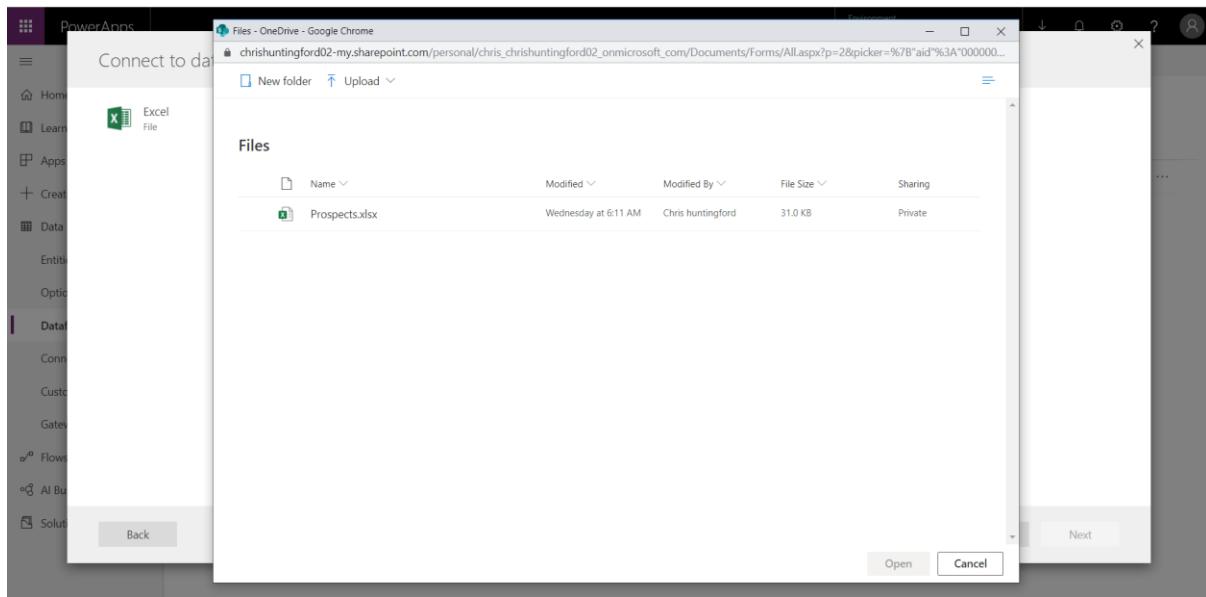
There are a load of options / Data Sources you could select from. Pick “Excel” in this scenario.



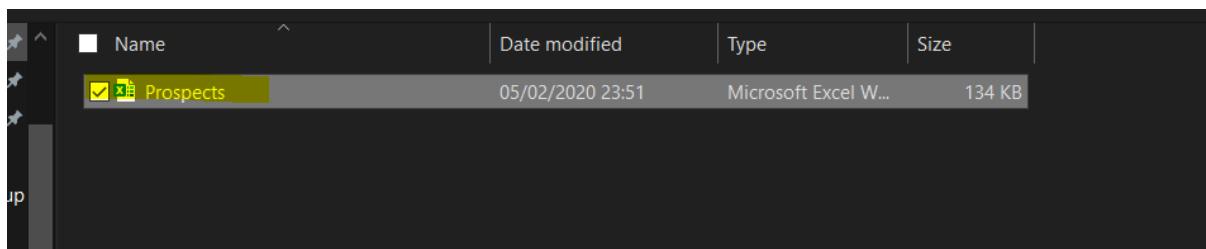
You will now be taken to a page where you need to specify the location of the Excel Document.



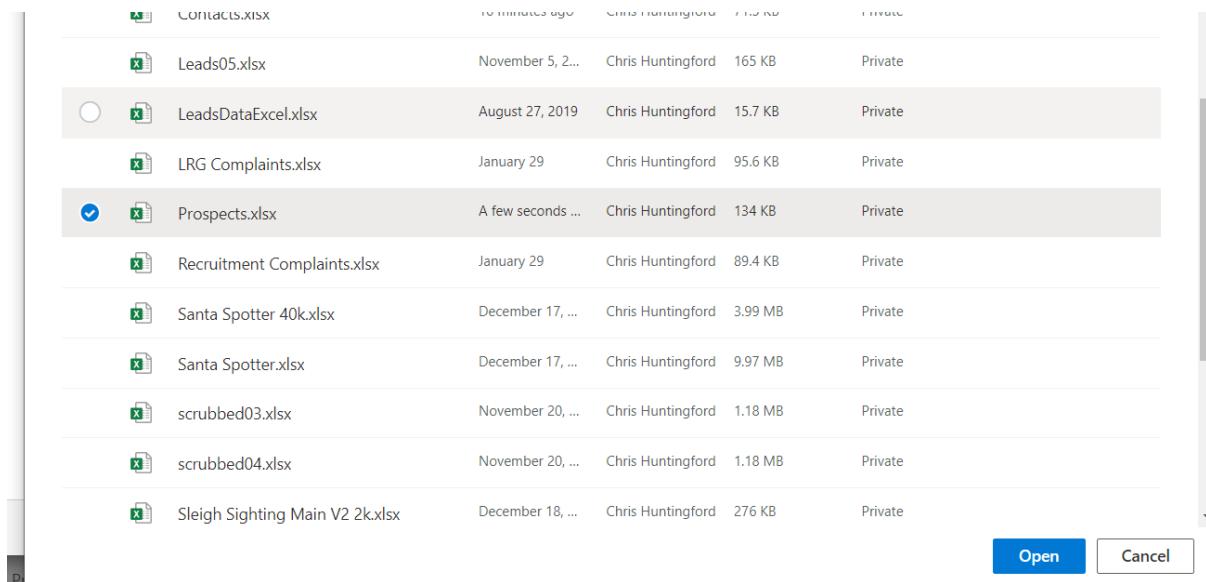
Click "browse" and another OneDrive window will open. Assuming you have not done this exercise before, you will see no files in the OneDrive repository.



Click “Upload” and navigate to the location where you saved the “Sleigh Sighting” Excel file, Select the file and select Open.

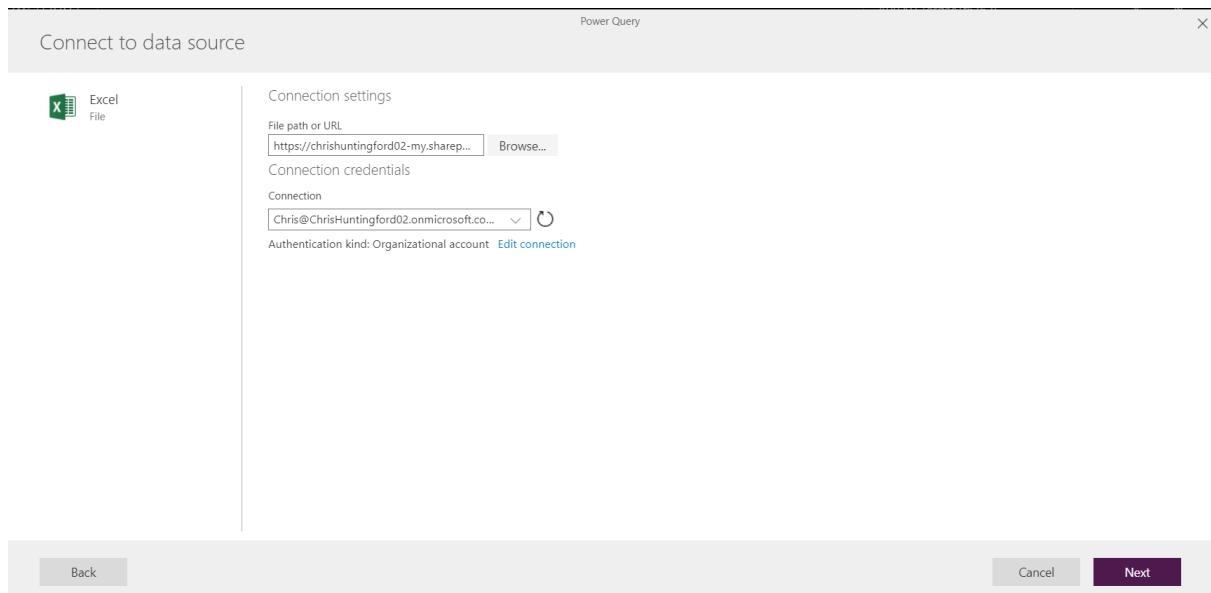


Once the file has been uploaded you will see it in the OneDrive repository.



Select the file and click “open”. This will load the file path into the Power Query Data Source connection settings.

Check the file location and click “Next” to progress to the next step.



View the Excel dataset in Power query and select “Transform Data” to continue.

ABC Column1	ABC Column2	ABC Column3	ABC Column4	ABC Column5	ABC Column6	ABC Column7	ABC Column8
1 Adrienne	Root	ARoot@Therandomemail.com	Herefordshire, County of	HR1 9TS	52.053	-2.65	
2 Andrew	Peach	APeach@Therandomemail.com	Cheshire East	CW12 3HQ	53.165	-2.15	
3 Carmen	Vex	CVex@Therandomemail.com	City of Edinburgh	EH1 3EB	55.956	-3.75	
4 Dinesh	Nanjiani	Dnanjiani@Therandomemail.com	Darlington	DL2 3YL	54.522	-1.55	
5 Erlich	Bachman	EBachman@Therandomemail.com	Derry City and Strabane	BT47 3FT	55.026	-7.15	
6 Fred	Parsons	TParsons@Therandomemail.com	Cardiff	CF3 3BN	51.502	-3.12	
7 James	Peters	Jpeters@Therandomemail.com	Coventry	CV2 5NQ	52.405	-1.45	
8 Jason	Margera	Jmargera@Therandomemail.com	Cheshire West and Chester	CH65 1HN	53.288	-2.5	
9 Jeff	Harding	Jharding@Therandomemail.com	Sandwell	DY4 0NQ	52.537	-2.05	
10 Jennifer	Berry	JBerry@Therandomemail.com	Birmingham	B10 0RK	52.473	-1.85	
11 Kate	Wineford	KWineford@Therandomemail.com	Exeter	EX4 7EN	50.735	-3.55	
12 Laurie	Bream	LBream@Therandomemail.com	Harrow	HA3 7DD	51.604	-0.35	
13 Lucy	Paterson	LPaterson@Therandomemail.com	Antrim and Newtownabbey	BT41 4DD	54.713	-6.25	
14 Mark	Gilfoyle	MGilfoyle@Therandomemail.com	Birmingham	B42 1SU	52.526	-1.95	
15 Mary	Wilkinson	MWilkinson@Therandomemail.com	Belfast	BT1 1BL	54.599	-5.95	
16 Matt	Burk	MBurk@Therandomemail.com	Cardiff	CF2 4SL	51.494	-3.15	
17 Michelle	Carter	MCarter@Therandomemail.com	Tower Hamlets	E2 0NG	51.528	-0.05	
18 Mohamed	Sendrani	Msendrani@Therandomemail.com	New Forest	BH25 6XB	50.752	-1.65	
19 Monica	Crew	MCrew@Therandomemail.com	Carlisle	CA4 8QW	54.906	-2.85	
20 Richard	Hendricks	RHendricks@Therandomemail.com	Birmingham	B6 9BD	52.496	-1.85	
21 Sally	Jacobs	SJacobs@Therandomemail.com	Torrige	EX22 6EF	50.81	-4.35	
22 Sarah	Stanley	SStanley@Therandomemail.com	Uttlesford	CB10 1JD	52.023	0.25	
23 Stuart	Marshall	SMarshall@Therandomemail.com	Glasgow City	G2 3BW	55.865	-4.25	
24 Susan	Wills	SWills@Therandomemail.com	Birmingham	B33 0PT	52.466	-1.75	

Select “use first Rows as Headers” from the “Transform Table”.

You will see that the new header names are now visible in the table.

Table.TransformColumnTypes(#"Promoted headers", {"Prospect ID", Int64.Type}, {"First Name", type text}, {"Last Name", type text}, {"Email", type text}, {"City", type text}, {"Post Code", type text}, {"lat", type number}, {"lon", type number})

Prospect ID	First Name	Last Name	Email	City	Post Code	lat	lon
1	Adrienne	Root	ARoot@Therandomemail.com	Herefordshire, County of	HR1 9TS	52.052	-2.685
2	Andrew	Peach	APeach@Therandomemail.com	Cheshire East	CW12 3HQ	53.162	-2.315
3	Carmen	Vex	CVex@Therandomemail.com	City of Edinburgh	EH1 3EB	55.956	-3.195
4	Dinesh	Nanjiani	Dnanjiani@Therandomemail.com	Darlington	DL2 3YL	54.522	-1.885
5	Erlich	Bachman	EBachman@Therandomemail.com	Derry City and Strabane	BT47 3FT	55.026	-5.885

Change “Unique ID” to a text value

Edit queries

Get data Manage parameters Refresh Options Manage columns Transform column Transform table Reduce rows Add column Go to column ...

Queries < Santa Spotter

Table.TransformColumnTypes(#"Promoted headers", {"Unique ID", Int64.Type}, {"Date Spotted", type any}, {"city", type text}, {"country", type text}, {"duration", type duration}, {"shape", type text}, {"comments", type text})

Unique ID	Date Spotted	city	country	duration	shape	comments
1.2	00 PM	sydney (nsw australia)	au	2,700	Sleigh	In the winter months of 1958 on a ^
\$	00 PM	woy woy (australia)	au	300	Sleigh	Repeated sightings of similar Sleigh
3	>00 AM	brisbane (australia)	au	300	Sleigh	The Sleigh was black with red light
%	00 PM	hoppers crossing (australia)	au	600	Sleigh	three u.f.o in triangular sleigh 500
5	00 PM	melbourne (100 ml. south of) (vic australia)	au	0	Sleigh	Flying sleigh shaped craft sighted
6	10:00 AM	adelaide (south australia)	au	30	Sleigh	Several people witnessed positive
7	00 PM	yorkies knob (north of cairns) (qld australia)	au	600	Sleigh	1 slow moving Sleigh rising from E
8	10:00 PM	gold coast (australia)	au	0	Sleigh	Photo of a very large complex flyi
9	>00 AM	newcastle (australia)	au	300	Sleigh	stop up hill in car take photo of ca
10	10:00 PM	wollongong (nsw australia)	au	240	Sleigh	two star light Sleights travelling wil
11	10:00 PM	perth (western australia)	au	30	Sleigh	I saw three triangular Sleights the (
12	10:00 PM	nowra (australia)	au	989	Sleigh	On one sunday afternoon an obje
13	00 PM	melbourne (vic australia)	au	5	Sleigh	Sleigh type object sighting report
14	10:00 PM	melbourne (vic australia)	au	60	Sleigh	3 Reports Sleigh sightings includin
15	51,851 3/11/2001, 10:00:00 PM	malbunne (vic australia)	au	0	Sleigh	Sleights near melbunne with flick

Query settings Name: Santa Spotter Applied steps Source Navigation Promoted headers Changed column type

Select “Replace Current” when changing the data types.

Table.TransformColumnTypes(#"Promoted headers", {"Unique ID", Int64.type}, {"Date Spotted", type any}, {"city", type text}, {"country", type text}, {"duration", type duration}, {"shape", type text}, {"comments", type text})

Unique ID	Date Spotted	city	country	duration	shape	comments
1	71,111 6/6/1958, 6:45:00 PM	sydney (nsw australia)	au	2,700	Sleigh	In the winter months of 1958 on a ^
2	14,562 7/1/1967, 9:30:00 PM	woy woy (australia)	au	300	Sleigh	Repeated sightings of similar Sleigh
3	26,830 1/6/1967, 10:00:00 PM	brisbane (australia)	au	300	Sleigh	The Sleigh was black with red light
4	51,898 5/2/197	hoppers crossing (australia)	au	600	Sleigh	three u.f.o in triangular sleigh 500
5	10,558 7/1/197	newcastle (australia)	au	0	Sleigh	Flying sleigh shaped craft sighted
6	9,297 10/1/197	wollongong (nsw australia)	au	300	Sleigh	several people witnessed positive
7	75,967 1/1/198	perth (western australia)	au	30	Sleigh	1 slow moving Sleigh rising from E
8	54,990 1/6/198	nowra (australia)	au	989	Sleigh	Photo of a very large complex flyi
9	46,959 6/12/19	malbunne (vic australia)	au	5	Sleigh	stop up hill in car take photo of ca
10	5,237 12/12/1	melbourne (vic australia)	au	60	Sleigh	two star light Sleights travelling wil
11	55,648 9/10/19	malbunne (vic australia)	au	0	Sleigh	I saw three triangular Sleights the (
12	60,618 11/6/19	brisbane (australia)	au	15,325	Active	On one sunday afternoon an obje
13	2,820 9/1/199	brisbane (australia)	au	153,024	Active	Sleigh type object sighting report
14	80,847 3/6/2001, 8:00:00 PM	brisbane (australia)	au	144,963	Active	3 Reports Sleigh sightings includin
15	51,851 3/11/2001, 10:00:00 PM	brisbane (australia)	au	144,963	Active	Sleights near melbunne with flick

Query settings Name: Santa Spotter Applied steps Source Navigation Promoted headers Changed column type

Change the Latitude and longitude data types from Numeric to Text.

Table.TransformColumnTypes(#"Promoted headers", {"Unique ID", type text}, {"Date Spotted", type any}, {"city", type text}, {"country", type text}, {"duration", type duration}, {"shape", type text}, {"comments", type text})

Unique ID	Date Spotted	city	country	duration	shape	comments		
1	2,700	Sleigh	In the winter months of 1958 on a clear winter night while looking at the	1.2	Decimal number	-33.861	151.205	Closed
2	300	Sleigh	Repeated sightings of similar Sleights over a period of years always landi	\$	Currency	-33.484	151.325	Active
3	300	Sleigh	The Sleigh was black with red lights and strange markings on it.	3	Whole number	-27.471	153.024	Active
4	600	Sleigh	three u.f.o in triangular sleigh 500m apart moving slowly sideways ther	%	Percentage	-37.869	144,693	Pending
5	0	Sleigh	Flying sleigh shaped craft sighted over farm with occupant emerging fly	5	Date/Time	-37.814	144,963	Active
6	30	Sleigh	Several people witnessed positive Sleigh on clear day.	6	Date	-34.929	138,599	Active
7	600	Sleigh	1 slow moving Sleigh rising from East (ocean) to West on straight path n	7	Time	-16.817	145,717	Pending
8	0	Sleigh	Photo of a very large complex flying sleigh or more likely photographic b	8	Date/Time/Zone	-28	151,431	Active
9	300	Sleigh	stop up hill in car take photo of car and this was on film zoomed in on cc	9	Duration	-32.928	151,784	Pending
10	240	Sleigh	i saw three traingular Sleights the one in the middle was bigger than the	10	True/False	-34.424	150,893	Active
11	30	Sleigh	On one sunday afternoon an object was seen 2-3km away in the east an	11	Text	-31.952	115,861	Pending
12	989	Sleigh	True/False	12	Binary	-34.884	150,6	Pending
13	5	Sleigh	Sleigh type object sighting report - Approx 1 Sep 1999 Like a huge mete	13	Binary	-37.814	144,963	Pending
14	60	Sleigh	3 Reports Sleigh sightings including news 7 newsreport video http://www	14	Binary	-37.814	144,963	Active

Query settings Name: Santa Spotter Applied steps Source Navigation Promoted headers Changed column type

Select “Replace Current” when changing the data types.

Change column type

The selected column has an existing type conversion. Would you like to replace the existing conversion, or preserve the existing conversion and add the new conversion as a separate step?

**Replace current**   **Add new step**   **Cancel**

Unique ID	Date Spotted	city	country	duration	shape	comments
1	71,111	6/6/1958, 6:45:00 PM	sydney (nsw australia)	au	2,700	Sleigh
2	14,562	7/1/1967, 9:30:00 PM	woy woy (australia)	au	300	Sleigh
3	26,830	1/6/1967				
4	51,898	5/2/197				
5	10,558	7/1/197				
6	9,297	10/1/19				
7	75,967	1/1/198				
8	54,990	1/6/198				
9	46,959	6/12/19				
10	5,237	12/12/1				
11	55,646	9/10/19				
12	60,618	11/6/19				
13	2,820	9/1/199				
14	80,847	3/6/2001, 8:00:00 PM	melbourne (vic australia)	au	60	Sleigh
15	51,851	3/11/2001, 10:00:00 PM	melbourne (vic australia)	au	0	Sleigh

Do the same for longitude.

Edit queries

Get data   Manage parameters   Refresh   Options   Manage columns   Transform column   Transform table   Reduce rows   Add column   Go to column ...

Queries   **Santa Spotter**

Row	shape	comments	date posted	latitude	longitude	Status
1	2,700	Sleigh	In the winter months of 1958 on a clear winter night while looking at the south... 5/13/21	Decimal number	151.205	Closed
2	300	Sleigh	Repeated sightings of similar Sleighs over a period of years always landing at o... 11/5/21	\$ Currency	151.325	Active
3	300	Sleigh	The Sleigh was black with red lights and strange markings on it. 12/12/21	% Whole number	153.024	Active
4	600	Sleigh	three u.f.o in triangular sleigh 500m apart moving slowly sideways then rapidl... 11/20/21	% Percentage	144.693	Pending
5	0	Sleigh	Flying sleigh shaped craft sighted over farm with occupant emerging flying to g... 2/3/20	Date/Time	144.963	Active
6	30	Sleigh	Several people witnessed positive Sleigh on clear day 7/10/21	Date	138.599	Active
7	600	Sleigh	1 slow moving Sleigh rising from East (ocean) to West on straight path rectangu... 6/20/21	Date/Time	145.717	Pending
8	0	Sleigh	Photo of a very large complex flying sleigh or more likely photographic blimish ... 11/28/21	Time	153.431	Active
9	300	Sleigh	stop up hill in car take photo of car and this was on film zoomed in on compute... 10/30/21	Date/Time/Zone	151.784	Pending
10	240	Sleigh	two star light Sleighs travelling with my car on either side and took off in a unis... 5/8/20	Duration	150.893	Active
11	30	Sleigh	I saw three triangular Sleighs the one in the middle was bigger than the other o... 12/16/21	Text	115.861	Pending
12	989	Sleigh	On one sunday afternoon an object was seen 2-3km away in the east and with... 2/18/21	True/False	150.6	Pending
13	5	Sleigh	Sleigh type object sighting report - Approx 1 Sep 1999 Like a huge motor type o... 12/9/21	Binary	144.963	Pending
14	60	Sleigh	3 Reports Sleigh sightings including news 7 newsreport video http://www.star... 8/16/21		144.963	Active

Select “Replace Current” when changing the data types. You will notice as you scroll across the sheet, many of the columns have different data types. Leave these as they are.

Query settings

Name: Santa Spotter

Applied steps: Source, Navigation, Promoted headers, Changed column type

Change column type

The selected column has an existing type conversion. Would you like to replace the existing conversion, or preserve the existing conversion and add the new conversion as a separate step?

**Replace current**   **Add new step**   **Cancel**

Unique ID	Date Spotted	city	country	duration	shape	comments
1	71,111	6/6/1958, 6:45:00 PM	sydney (nsw australia)	au	2,700	Sleigh
2	14,562	7/1/1967, 9:30:00 PM	woy woy (australia)	au	300	Sleigh
3	26,830	1/6/1967				
4	51,898	5/2/197				
5	10,558	7/1/197				
6	9,297	10/1/19				
7	75,967	1/1/198				
8	54,990	1/6/198				
9	46,959	6/12/19				
10	5,237	12/12/1				
11	55,646	9/10/19				
12	60,618	11/6/19				
13	2,820	9/1/199				
14	80,847	3/6/2001, 8:00:00 PM	melbourne (vic australia)	au	60	Sleigh
15	51,851	3/11/2001, 10:00:00 PM	melbourne (vic australia)	au	0	Sleigh

Select “Next” to move onto the Power Query load screen.

Queries < fx - Table.TransformColumnTypes("#Promoted headers", {{"Unique ID", "type text"}, {"Date Spotted", "type any"}, {"city", "type text"}, {"country", "type text"}, {"duration", "type number"}, {"shape", "type text"}, {"comments", "type text"}]

Santa Spotter

Query settings >

Name: Santa Spotter

Applied steps

- Source
- Navigation
- Promoted headers \*
- X Changed column type

Next

On the Mapping Entities screen select “Load to a New Entity”. This will create a brand-new entity when importing the data and will save you the time of having to create the entity and attributes from scratch.

Enter the Entity name as “Prospects” and the Display name as “Prospects”.

Select “Delete rows that no longer exist in the query output”.

Queries < Load settings

Prospects

Load settings

Load to existing entity  
 Load to new entity  
 Do not load

Entity name: Prospects

Entity display name: Prospects

Entity description:

Delete rows that no longer exist in the query output

Field mapping

Source column	Destination field	Destination field type
City	crdfa_City	Multiline text
Date of interest	crdfa_Dateofinterest	Date only
Email	crdfa_Email	Multiline text
First Name	crdfa_FirstName	Multiline text
Last Name	crdfa_LastName	Multiline text
lat	crdfa_lat	Multiline text
lead Converted	crdfa_leadConverted	Two options
Long	crdfa_Long	Multiline text
Post Code	crdfa_PostCode	Multiline text
Product Interest	crdfa_ProductInterest	Multiline text
Prospect ID	crdfa_ProspectID	Multiline text

Primary name field: (none) Please select a primary name field

Back Cancel Next

Set all the field types to EEXT , EXCEPT FOR “REQUIREMENT”, which must be set to “MultilineText” because it is more than 100 characters.

Set the Key field to “Prospect ID” and the Primary field to “Prospect ID” as well.

**Queries**

**Load settings**

- Load to existing entity
- Load to new entity
- Do not load

Entity name: Prospects

Entity display name: Prospects

Entity description:

Delete rows that no longer exist in the query output

**Field mapping**

Key fields	Primary name field	
crdfa_ProspectID	Prospect ID	
First Name	crdfa_FirstName	Text
Last Name	crdfa_LastName	Text
lat	crdfa_Lat	Text
lead Converted	crdfa_LeadConverted	Two options
Long	crdfa_Long	Text
Post Code	crdfa_PostCode	Text
Product Interest	crdfa_ProductInterest	Text
Prospect ID	crdfa_ProspectID	Text
Rating	crdfa_Rating	Text
Requirement	crdfa_Requirement	Multiline text
Satisfaction Rating	crdfa_SatisfactionRating	Whole number
Status	crdfa_Status	Text

Back Cancel Next

Hit “next” to continue.

Select “Refresh manually” and then click “Create”.

PowerApps

Refresh settings

Power Query

Environment

Refresh settings

Refresh manually

Refresh automatically

Cancel Create

You will be able to see the indicator of the entity being created in the background, in the form of 3 resizing dots. This may take some time so use the time to plan your next steps....

Load Progress

• • •

X

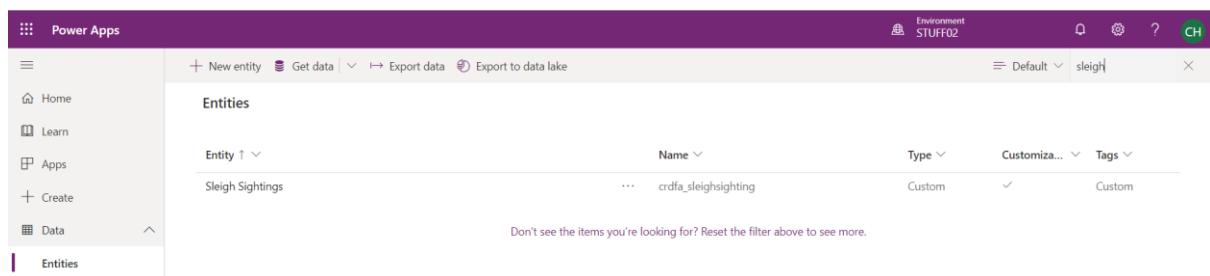
Santa Spotter

Creating entity

Done

Once the process is complete you will be notified. Click the “Done” button to proceed.

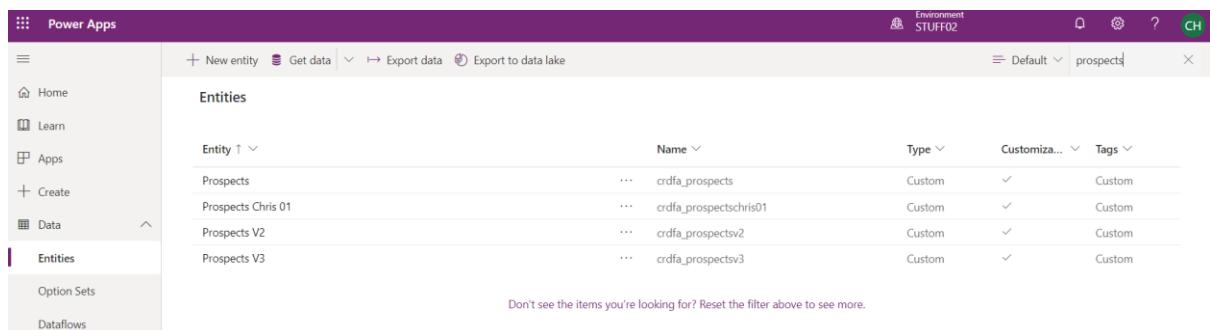
You will see your Data flow has now been added to the list and your entity added to the Common Data Service



The screenshot shows the Power Apps Entities list. The left sidebar has 'Entities' selected. The main area shows a table with columns: Entity, Name, Type, Customiza..., and Tags. One row is visible: 'Sleigh Sightings' with 'crdfa\_sleightsighting' under Name, 'Custom' under Type, a checkmark under Customiza..., and 'Custom' under Tags. A filter bar at the top right shows 'Default' and 'sleigh'. A message at the bottom says 'Don't see the items you're looking for? Reset the filter above to see more.'

Entity ↑	Name	Type	Customiza...	Tags
Sleigh Sightings	crdfa_sleightsighting	Custom	✓	Custom

This concludes Lab number 1 and the focus around the bringing in data from a data source into the Common Data Service. If you go to “Make.PowerApps.Com” and select data, then search for Prospects, you will be able to see the entity that was just created.



The screenshot shows the Power Apps Entities list. The left sidebar has 'Entities' selected. The main area shows a table with columns: Entity, Name, Type, Customiza..., and Tags. Four rows are listed: 'Prospects' (crdfa\_prospects), 'Prospects Chris 01' (crdfa\_prospectschris01), 'Prospects V2' (crdfa\_prospectsv2), and 'Prospects V3' (crdfa\_prospectsv3). All are of type 'Custom' and have a checkmark under 'Customiza...'. A filter bar at the top right shows 'Default' and 'prospects'. A message at the bottom says 'Don't see the items you're looking for? Reset the filter above to see more.'

Entity ↑	Name	Type	Customiza...	Tags
Prospects	crdfa_prospects	Custom	✓	Custom
Prospects Chris 01	crdfa_prospectschris01	Custom	✓	Custom
Prospects V2	crdfa_prospectsv2	Custom	✓	Custom
Prospects V3	crdfa_prospectsv3	Custom	✓	Custom

Click on the Prospects entity to see all of the fields that were created.

The screenshot shows the Microsoft Power Apps portal interface. On the left, there's a navigation sidebar with options like Home, Learn, Apps, Create, Data, Entities, Option Sets, Dataflows, Export to data lake, Connections, Custom Connectors, Gateways, Flows, AI Builder, and Solutions. The 'Entities' section is currently selected. In the main area, the title is 'Entities > Prospects'. Below this, there are tabs for Fields, Relationships, Business rules, Views, Forms, Dashboards, Charts, Keys, and Data. The 'Fields' tab is selected. A table lists the fields for the 'Prospects' entity:

Display name ↑	Name ↓	Data type ↓	Type ↓	Custom... ↓	Required ↓	Searchable... ↓
City	crdfa_city	Text	Custom	✓	✓	
Created By	createdby	Lookup	Standard	✓	✓	
Created By (Delegate)	createdonbehalfby	Lookup	Standard	✓	✓	
Created On	createdon	Date and time	Standard	✓	✓	
Date of Interest	crdfa_dateofinterest	Date Only	Custom	✓		
Email	crdfa_email	Text	Custom	✓	✓	
First Name	crdfa_firstname	Text	Custom	✓	✓	
Import Sequence Number	importsequencenumber	Whole number	Standard	✓	✓	
Last Name	crdfa_lastname	Text	Custom	✓	✓	
Lat	crdfa_lat	Text	Custom	✓	✓	
lead Converted	crdfa_leadconverted	Two Options	Custom	✓		
Long	crdfa_long	Text	Custom	✓	✓	
Modified By	modifiedby	Lookup	Standard	✓	✓	
Modified By (Delegate)	modifiedonbehalfby	Lookup	Standard	✓	✓	
Modified On	modifiedon	Date and time	Standard	✓	✓	

## Lab 3: Configuring Forms, Views & Charts in the CDS

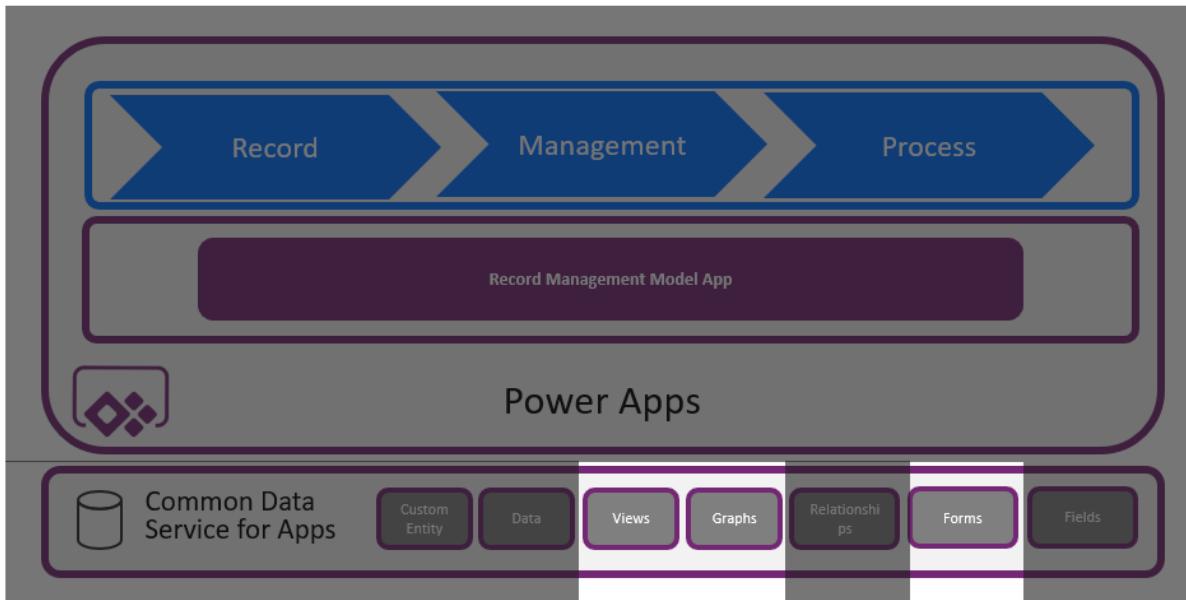
In this lab we will be creating the pieces required to build your model Driven application. We will start off by leveraging the data structure you just brought into the Common Data Service (CDS) via Data Flows from Excel. This will give the users of the solution a much more efficient mechanism to interact with the data.

### **Please Note:**

**This lab can be completed independently, with only Lab 1 being and no support of the other labs.**

### Solution Components

The Common Data Service (CDS): Forms, Views & Graphs (Charts)



## Let's Begin

Navigate to [make.PowerApps.Com](https://make.powerapps.com) and select “Data” from the menu on the left. Then navigate to “[Entities](#)”. This will display a list of the standard data entities within the Common Data Service. If you have added any other custom entities or solutions, the relevant set of entities will be visible here.

Entity	Name	Type	Tags
Account	account	Standard	Master
Address	customeraddress	Standard	
AI Configuration	msdyn_aiconfiguration	Custom	Custom
AI Form Processing Document	msdyn_aifptrainingdocument	Custom	Custom
AI Model	msdyn_aimodel	Custom	Custom
AI Object Detection Bounding Box	msdyn_aiodrainingboundingbox	Custom	Custom
AI Object Detection Image	msdyn_aiodimage	Custom	Custom
AI Object Detection Image Mapping	msdyn_aiodrainingimage	Custom	Custom
AI Object Detection Label	msdyn_aiodlabel	Custom	Custom
AI Template	msdyn_aitemplate	Custom	Custom
Analysis Component	msdyn_analysiscomponent	Custom	Custom
Analysis Job	msdyn_analysisjob	Custom	Custom
Analysis Result	msdyn_analysisresult	Custom	Custom
Analysis Result Detail	msdyn_analysisresultdetail	Custom	Custom
Appointment	appointment	Standard	Productivity
Attachment	activitymimeattachment	Standard	Productivity
Business Unit	businessunit	Standard	Standard

Search for prospects in the top right and you will see that there is an entity that has been created. If you do not see your “Prospects” entity, do the following:

1. Make sure you are in the correct Environment ([See the first step in Lab 1](#))
2. Refresh the entire maker Experience web page if you do not see your newly created entity

The screenshot shows the PowerApps Entities screen. The left sidebar has a 'Data' section expanded, showing 'Entities'. The main area displays the 'Prospects' entity with the following details:

Name	Type	Tags
cre0c_prospects	Custom	Custom

A message at the bottom says, "Don't see the items you're looking for? Reset the filter above to see more."

When opening the Prospects Entity, you will see a list of the fields that have been added to the entity.

The screenshot shows the PowerApps Fields screen for the 'Prospects' entity. The left sidebar has a 'Data' section expanded, showing 'Entities'. The main area displays the list of fields:

Display name	Name	Data type	Type	Required	Searchable
City	cre0c_city	Text	Custom	✓	✓
Date of Interest	cre0c_dateofinterest	Date Only	Custom	✓	
Email	cre0c_email	Text	Custom	✓	✓
First Name	cre0c_firstname	Text	Custom	✓	
Last Name	cre0c_lastname	Text	Custom	✓	
Lat	cre0c_lat	Text	Custom	✓	
Long	cre0c_long	Text	Custom	✓	
Post Code	cre0c_postcode	Text	Custom	✓	
Product Interest	cre0c_productinterest	Text	Custom	✓	
Prospect ID	cre0c_prospectid	Text	Custom	✓	
Rating	cre0c_rating	Text	Custom	✓	
Satisfaction Rating	cre0c_satisfactionrating	Whole N...	Custom		
Status	cre0c_status	Text	Custom	✓	

A message at the bottom says, "Don't see the items you're looking for? Reset the filter above to see more."

## Form Configuration

Forms are the mechanism used to capture and display data in Model Driven Applications. Select the “Forms” option from the tab headings.

The screenshot shows the PowerApps Studio interface with the 'Forms' tab selected for the 'Prospects' entity. The table lists three forms:

Name	Form type	Type
Information	... Quick View Form	Custom
Information	... Card	Custom
Information	... Main	Custom

A note at the bottom says: "Don't see the items you're looking for? Reset the filter above to see more."

Open the main information form to enter the form editor.

The screenshot shows the PowerApps Form Editor with the 'Information' form for the 'Prospects' entity. The left sidebar shows the available fields:

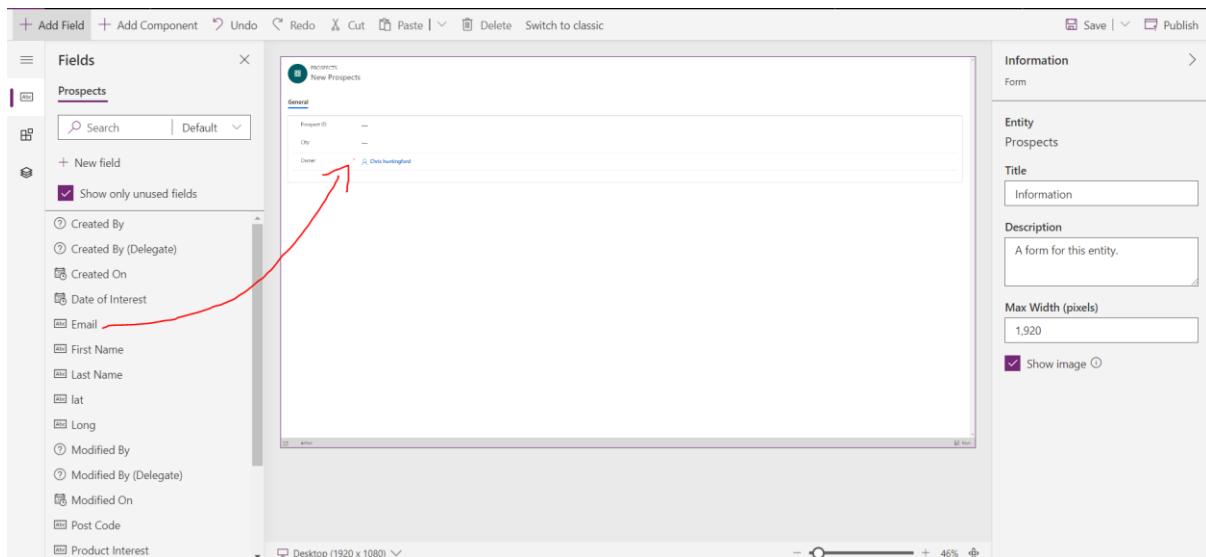
- Prospects
- + New field
- Show only unused fields
- City
- Created By
- Created By (Delegate)
- Created On
- Date of Interest
- Email
- First Name
- Last Name
- lat
- Long
- Modified By
- Modified By (Delegate)
- Modified On
- Post Code

The right panel shows the form's properties:

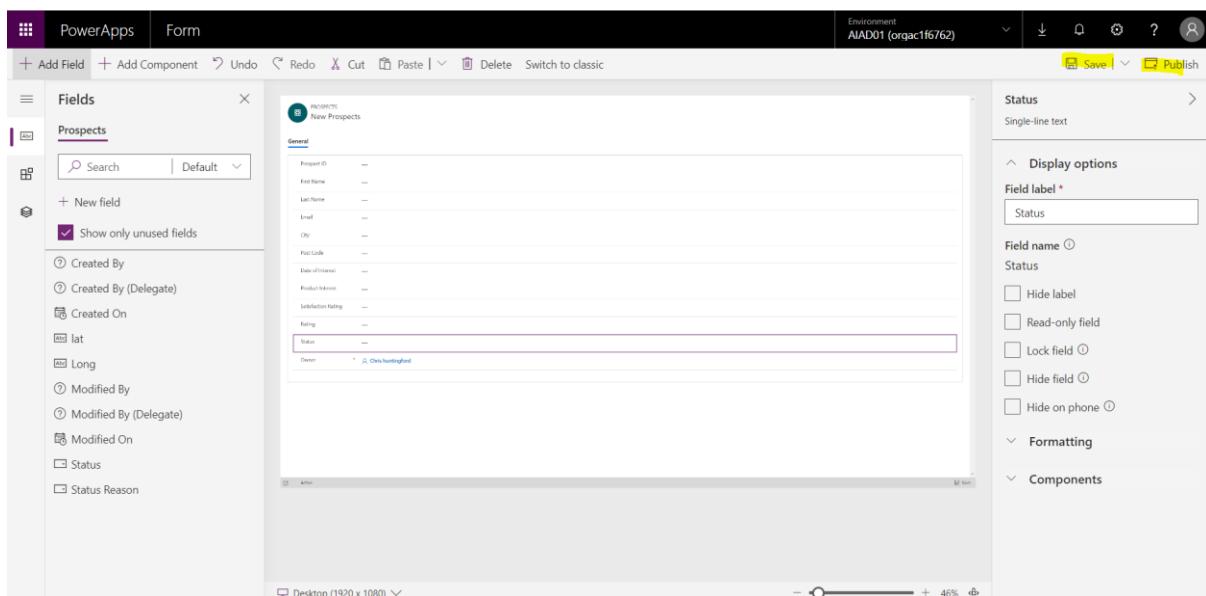
- Title:** Information
- Description:** A form for this entity.
- Max Width (pixels):** 1,920
- Show image

Drag and drop the following fields onto the form:

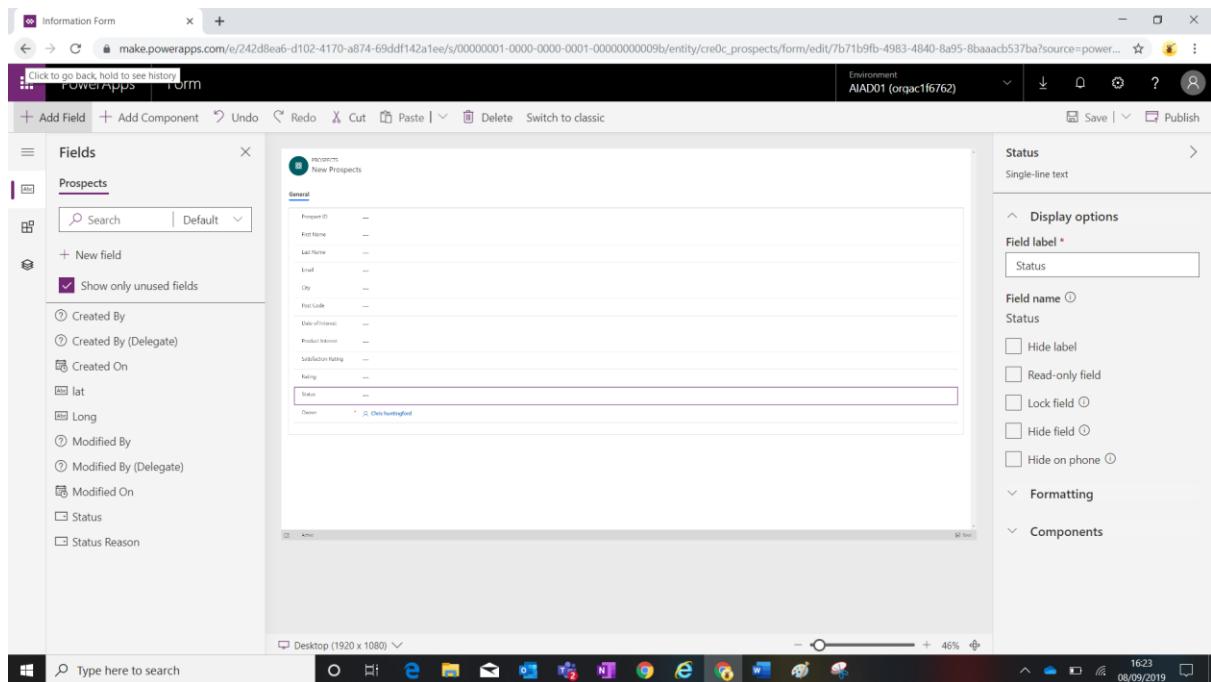
1. First Name
2. Last Name
3. Email
4. City
5. Post Code
6. Date of Interest
7. Product Interest
8. Satisfaction Rating
9. Rating
10. Status (there are 2 status fields, make sure you select the TEXT version of the field)



**Save and Publish the newly edited form.** You MUST do this before you navigate back to the main entity screen.



Click the Browser Back button to navigate to the main entity screen.



## View Configuration

Views are the mechanism used to view lists of data within all application types within the Power Platform. Select the “Views” tab from the menu.

The screenshot shows the Microsoft PowerApps Studio interface with the 'Views' tab selected for the 'Prospects' entity. The list includes various views such as 'Active Prospects', 'Inactive Prospects', 'Prospects Advanced Find View', 'Prospects Associated View', 'Prospects Lookup View', and 'Quick Find Active Prospects'. The 'Views' tab is highlighted in blue, indicating it is the active tab.

Open the “Active Prospects” view from the list.

The screenshot shows the PowerApps View interface. On the left, the 'Fields' pane is open, showing a list of fields under the 'Prospects' tab. The right side displays a table with 13 rows of prospect data. The columns are Prospect ID, Created On, and City. A red arrow points from the 'City' column header towards the 'Sort by ...' section in the ribbon.

Prospect ID	Created On	City
PRO001	9/8/2019 2:43 PM	Sheff
PRO002	9/8/2019 2:43 PM	Romford
PRO003	9/8/2019 2:43 PM	Tranent
PRO004	9/8/2019 2:43 PM	Stockton-on-Tees
PRO005	9/8/2019 2:43 PM	London
PRO006	9/8/2019 2:43 PM	Carmarthen
PRO007	9/8/2019 2:43 PM	Otley
PRO008	9/8/2019 2:43 PM	Looe
PRO009	9/8/2019 2:43 PM	Gunnislake
PRO010	9/8/2019 2:43 PM	Truro
PRO011	9/8/2019 2:43 PM	Liverpool
PRO012	9/8/2019 2:43 PM	York
PRO013	9/8/2019 2:43 PM	Newcastle upon ...

Drag and Drop the following fields into the main view headers section:

1. First Name
2. Last Name
3. City
4. Satisfaction Rating
5. Product Interest
6. Status

The screenshot shows the PowerApps View interface. A red arrow points from the 'First Name' field in the 'Fields' pane towards the header area of the table. The table columns are Prospect ID, City, and Created On. The right side of the screen shows the 'Active Prospects' view settings.

Prospect ID	City	Created On
PRO001	Sheff	9/8/2019 2:43 PM
PRO002	Romford	9/8/2019 2:43 PM
PRO003	Tranent	9/8/2019 2:43 PM
PRO004	Stockton-on-Tees	9/8/2019 2:43 PM
PRO005	London	9/8/2019 2:43 PM
PRO006	Carmarthen	9/8/2019 2:43 PM
PRO007	Otley	9/8/2019 2:43 PM
PRO008	Looe	9/8/2019 2:43 PM
PRO009	Gunnislake	9/8/2019 2:43 PM
PRO010	Truro	9/8/2019 2:43 PM
PRO011	Liverpool	9/8/2019 2:43 PM
PRO012	York	9/8/2019 2:43 PM
PRO013	Newcastle upon ...	9/8/2019 2:43 PM

Resize the product ID column to a smaller size to make sure there is less white space in the view.

PowerApps View

+ Add column Undo Redo Switch to classic

Environment AIAD01 (orgac1f6762)

Save Publish

Fields

Prospects Related

Search Default

+ New field

Show only unused fields

Date of Interest

Email

lat

Long

Post Code

Rating

Prospect ID ↑ First Name ↓ Last Name ↓ City ↓ Satisfaction R... ↓ Product Inter... ↓ Status ↓

Prospect ID	First Name	Last Name	City	Satisfaction R...	Product Inter...	Status
PRO001	Adrienne	Root	Crief	1	Power Platform	Contacted
PRO002	Andrew	Peach	Romford	2	Dynamics 365 CE	Pending
PRO003	Carmen	Vex	Tranent	9	SharePoint	Final Stages
PRO004	Dinesh	Nanjianni	Stockton-on-Tees	5	MS Teams	Contacted
PRO005	Erlich	Bachman	London	5	Dynamics 365 Bu...	Under Review
PRO006	Fred	Parsons	Carmarthen	9	Dynamics 365 Fi...	Contacted
PRO007	James	Peters	Otley	7	Power Platform	Contacted
PRO008	Jason	Margera	Looe	8	Power Platform	Final Stages
PRO009	Jeff	Harding	Gunnislake	9	Dynamics 365 CE	Contacted
PRO010	Jennifer	Berry	Truro	10	SharePoint	Under Review
PRO011	Kate	Wineford	Liverpool	9	MS Teams	Contacted
PRO012	Laurie	Bream	York	2	Dynamics 365 Bu...	Pending
PRO013	Lucy	Paterson	Newcastle upon ...	3	Dynamics 365 Fi...	Final Stages

Active Prospects

Name Active Prospects

Description

Sort by ...

↑ Prospect ID Then sort by ...

Filter by ...

Status is 'Active'

Edit filters ...

Save and Publish your changes to the “Active Prospects” view. Please do this before you navigate back to your main entity screen.

PowerApps View

+ Add column Undo Redo Switch to classic

Environment AIAD01 (orgac1f6762)

Save Publish

Fields

Prospects Related

Search Default

+ New field

Show only unused fields

Date of Interest

Email

lat

Long

Post Code

Rating

Prospect ID ↑ First Name ↓ Last Name ↓ City ↓ Satisfaction R... ↓ Product Inter... ↓ Status ↓

Prospect ID	First Name	Last Name	City	Satisfaction R...	Product Inter...	Status
PRO001	Adrienne	Root	Crief	1	Power Platform	Contacted
PRO002	Andrew	Peach	Romford	2	Dynamics 365 CE	Pending
PRO003	Carmen	Vex	Tranent	9	SharePoint	Final Stages
PRO004	Dinesh	Nanjianni	Stockton-on-Tees	5	MS Teams	Contacted
PRO005	Erlich	Bachman	London	5	Dynamics 365 Bu...	Under Review
PRO006	Fred	Parsons	Carmarthen	9	Dynamics 365 Fi...	Contacted
PRO007	James	Peters	Otley	7	Power Platform	Contacted
PRO008	Jason	Margera	Looe	8	Power Platform	Final Stages
PRO009	Jeff	Harding	Gunnislake	9	Dynamics 365 CE	Contacted
PRO010	Jennifer	Berry	Truro	10	SharePoint	Under Review
PRO011	Kate	Wineford	Liverpool	9	MS Teams	Contacted
PRO012	Laurie	Bream	York	2	Dynamics 365 Bu...	Pending
PRO013	Lucy	Paterson	Newcastle upon ...	3	Dynamics 365 Fi...	Final Stages

Active Prospects

Name Active Prospects

Description

Sort by ...

↑ Prospect ID Then sort by ...

Filter by ...

Status is 'Active'

Edit filters ...

Once you have Saved and Published, use the back button in the browser to navigate back to the main entity screen.

After navigating back, you will find yourself on the main entity where you can see a list of the views associated to the Prospect Entity.

## Charts Configuration

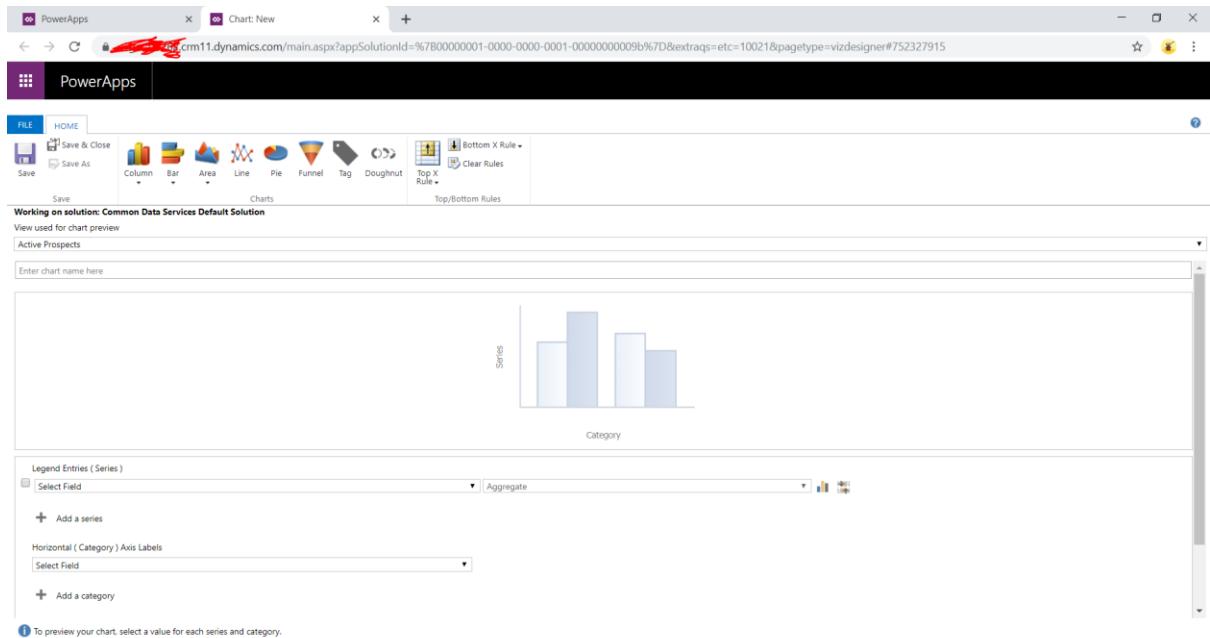
Charts are a mechanism to enable users the ability to understand and interact with data in a more visual format. Select the “Charts” tab from the menu. You will see that there are no charts currently available within the Prospect entity.

The screenshot shows the PowerApps interface for managing entities. The left sidebar has sections for Home, Learn, Apps, Create, Data (selected), and Entities. Under Entities, there are sub-options like Option Sets, Dataflows, Connections, Custom Connectors, Gateways, Flows, AI Builder (preview), and Solutions. The main content area is titled "Entities > Prospects". It includes tabs for Fields, Relationships, Business rules, Views, Forms, Dashboards, Charts (selected), Keys, and Data. A search bar at the top right contains "Search". Below the tabs, there's a filter section with "Name ↑" and "Type ↓". A large circular icon with a funnel symbol is centered, with the text "We didn't find anything to show here" below it. A link "Remove the filter to see other items, or try using an alternate search term" is shown, along with a "Remove filter" button.

Let's start by adding a new chart. Select “Add Chart” on the top left of the chart page.

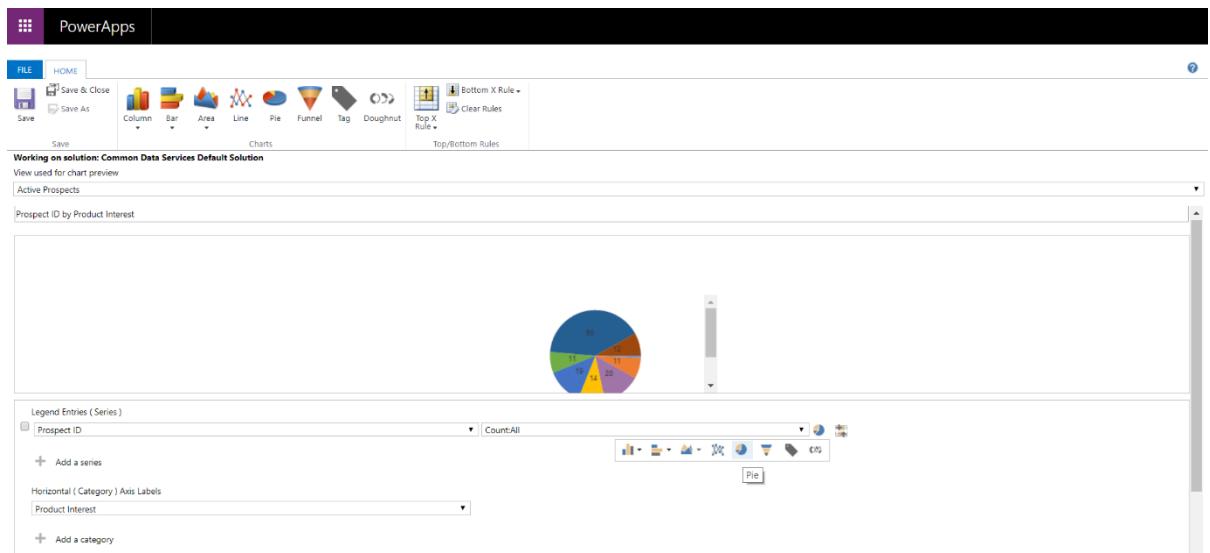
This screenshot is similar to the previous one, but the "Add chart" button in the top navigation bar is highlighted with a yellow background. The rest of the interface is identical, showing the "Entities > Prospects" page with the "Charts" tab selected.

The Chart editor will open in a separate page.



In the first chart we are going to display the number of prospects interested in different product types. Select the following from the various option sets:

1. View : “Active prospects”
2. Legend Entries : Prospect ID
3. Horizontal Axis Labels : Product Interest
4. Count : All
5. Chart Type : Pie Chart



Once you have completed the above steps, select “Save & Close”.

**Working on solution: Common Data Services Default Solution**

View used for chart preview

Active Prospects

Prospect ID by Product Interest

After saving, you will be navigated back to the Chart screen within the entity, where you will see that a new chart is being created. Select “Done”.

Add chart | Edit data in Excel | Get data | Export data | Delete entity | Settings

Entities > Prospects

Fields Relationships Business rules Views Forms Dashboards Charts Keys Data

Name ↑ Type ↓

Model-driven

Currently creating a new chart  
When you're done creating the chart, click Done below to return to the entity. This will refresh the page and fetch your changes.

Done

Remove filter

You can now see your chart in the chart list.

Entities > Prospects

Fields Relationships Business rules Views Forms Dashboards **Charts** Keys Data

Name ↑ Type ↓

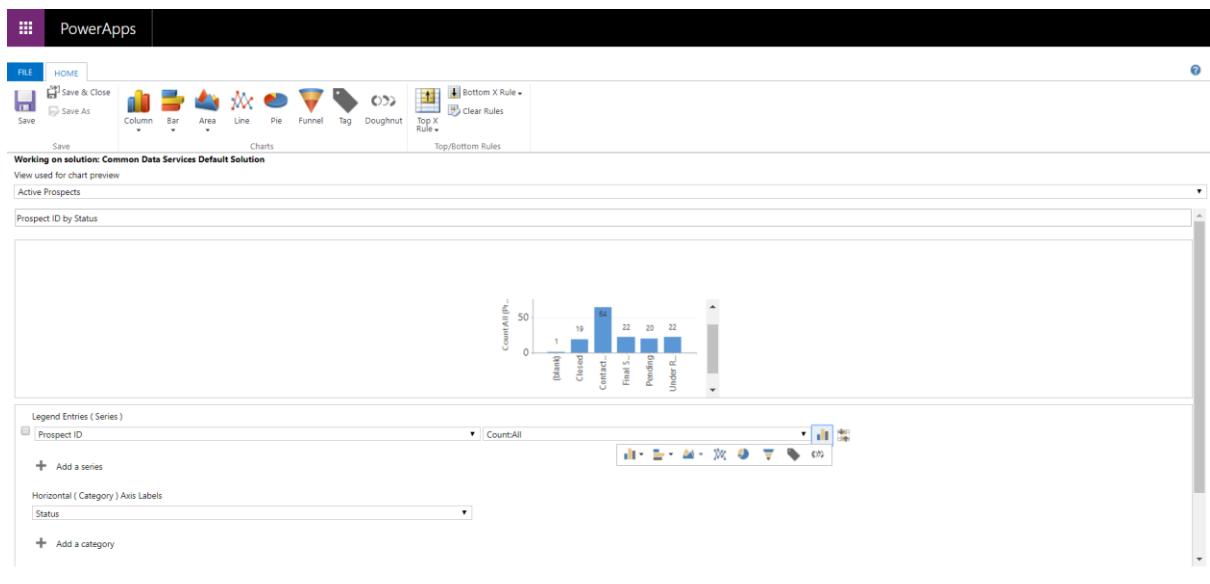
Prospect ID by Product Interest Custom

Don't see the items you're looking for? Reset the filter above to see more.

Follow the same steps as above to [create 2 more charts](#):

In this chart we are going to display the number of prospects currently within a certain status type. Select the following from the various option sets:

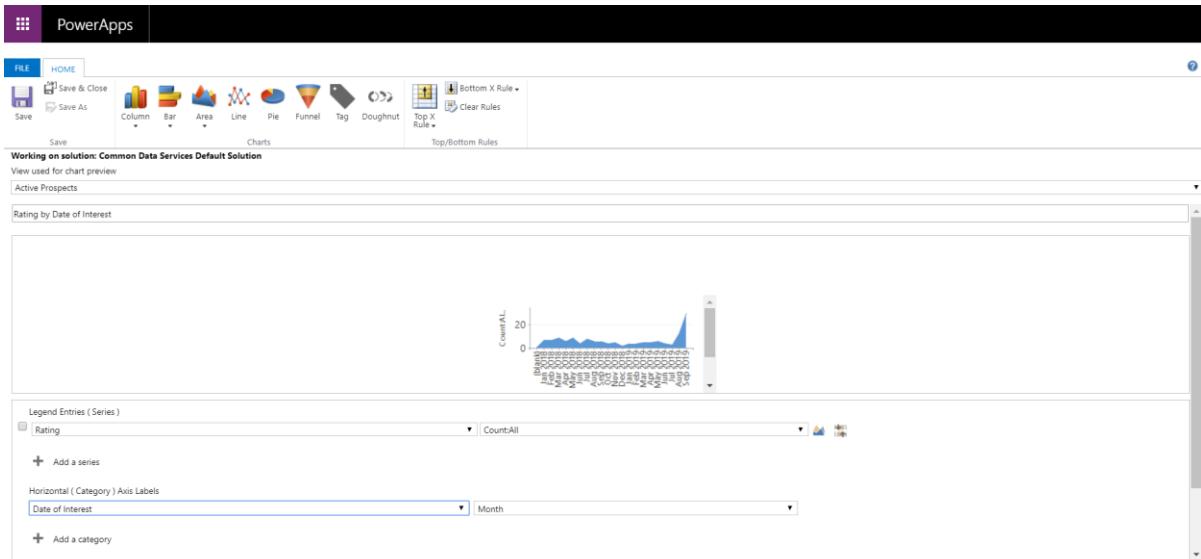
1. View : “Active prospects”
2. Legend Entries : Prospect ID
3. Horizontal Axis Labels : Status
4. Count : All
5. Chart Type : Bar Chart



In this chart we are going to display the rating of prospects by the date of interest (Month). Select the following from the various option sets:

1. View: “Active prospects”
2. Legend Entries: Rating
3. Horizontal Axis Labels: Date of Interest (Month)
4. Count: All

## 5. Chart Type: Area Chart



After completing this you should have 3 new charts in your list:

This screenshot shows the 'Entities' list in the PowerApps studio. The left sidebar has 'Data' expanded, showing 'Entities' which is currently selected. The main area shows a list of entities: 'Prospects' (highlighted in green), 'Fields', 'Relationships', 'Business rules', 'Views', 'Forms', 'Dashboards', 'Charts' (which is underlined in purple), 'Keys', and 'Data'. Below this, there's a section for 'Model-driven' entities. A table lists three entities: 'Prospect ID by Product Interest' (Type: Custom), 'Prospect ID by Status' (Type: Custom), and 'Rating by Date of Interest' (Type: Custom). At the bottom right, there's a message: 'Don't see the items you're looking for? Reset the filter above to see'.

## Lab 4: Configuring your Business Process Flow and Model Driven App experience

Now we need to expose the business logic to actual users within the organisation. In this lab we will configure a Model Driven application for the mid office users who will be controlling the collaboration with the Prospects and managing the flow of information

### Please Note:

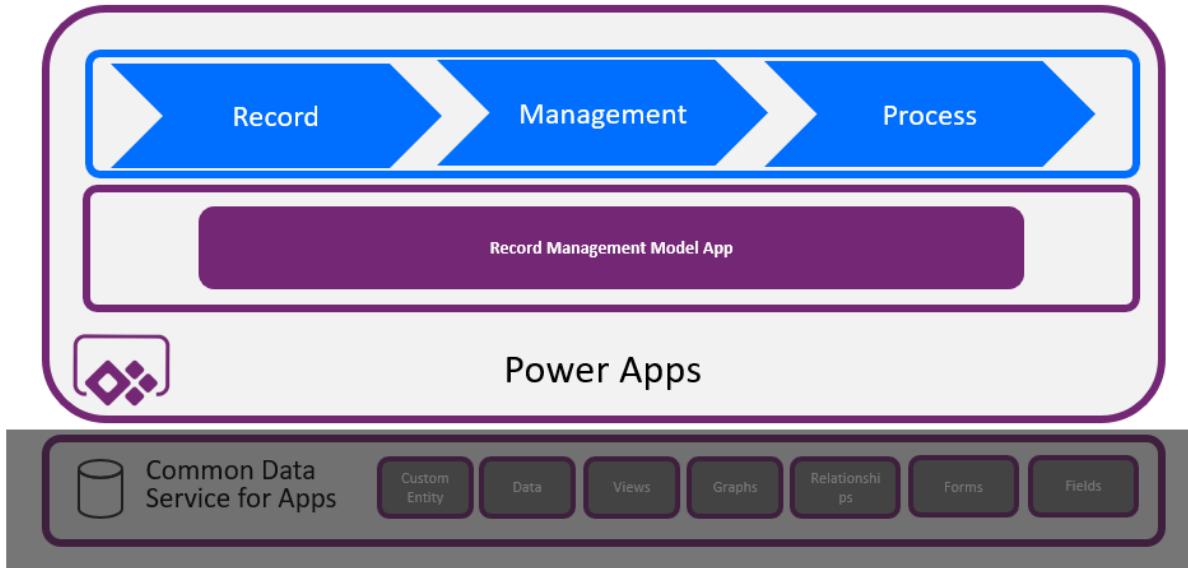
**Many of the elements in this lab are is reliant on the completion of Lab number 2. If you do not complete Lab number 2, the forms, graphs and views will not work in the same way. This is especially relevant in the Dashboards section.**

### Solution Components

PowerApps (Model Driven Applications)

## Microsoft Flow : Business Process Flow

### PowerApps (Classic Dashboards)



### Let's Begin

#### Business Process Flow

We will be creating a basic step by step process for the mid office user to follow when interacting with the prospect data captured by the sales user at the event.

Navigate to make.PowerApps.Com and navigate to “Flows” from the left-hand menu, then select “business Process Flows” from the tabs at the top. Depending of if you decided to load sample data when you created your new environment, your list of Flows may or may not be empty.

The screenshot shows the PowerApps Flows page. The left sidebar has "Apps" selected. The main area shows a table of flows:

Display name	Last modified
Translation Process	3 wk ago
Expired Process	3 wk ago
New Process	3 wk ago

The "Business process flows" tab is highlighted in yellow. The URL at the bottom is <https://make.powerapps.com/environments/242d9ead-d102-4170-a874-69dd142a1ee/app>.

Select “New” at the top left of the Flows page to start creating a new Business Process Flow. Call the new process Flow “Prospect Management” and select the Prospect Entity. Select “next” to continue.

The screenshot shows the PowerApps Flows interface. On the left, there's a navigation sidebar with options like Home, Learn, Apps, Create, Data, Entities, Option Sets, Dataflows, Connections, Custom Connectors, and Gateways. Below these, under 'Flows', are AI Builder (preview) and Solutions. The main area is titled 'Flows' and has tabs for 'My flows', 'Team flows', and 'Business process flows'. Under 'Business process flows', there are three existing flows: 'Translation Process' (last modified 3 weeks ago), 'Expired Process' (last modified 3 weeks ago), and 'New Process' (last modified 3 weeks ago). To the right, a modal window titled 'Create business process flow' is open. It contains fields for 'Display name \*' (Prospect Management), 'Name \*' (new\_prospectmanagement), and 'Common Data Service entity \*' (Prospects). At the bottom of the modal are 'Next' and 'Cancel' buttons.

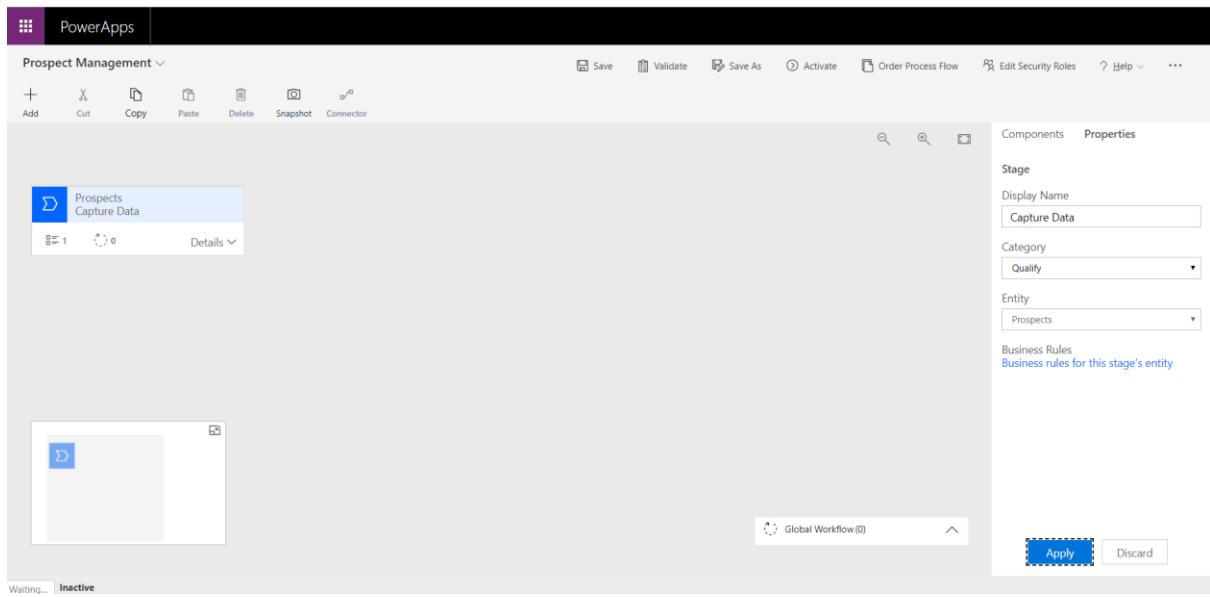
You will then be directed to a new browser tab that will expose the Flow Business Process Designer. The designer provides a drag and drop experience which really enables users to understand what the process will really look like.

The screenshot shows the Flow Business Process Designer. The top navigation bar includes Save, Validate, Save As, Activate, Order Process Flow, Edit Security Roles, Help, and more. The main workspace shows a flow with a single stage labeled 'Prospects New Stage'. On the right side, there's a 'Components' pane listing various flow components: Stage (selected), Condition, Data Step, Workflow, Action Step, and Flow Step (Preview). A status message at the bottom left says 'Waiting for orgac1f6762.crm11.dynamics.com...'.

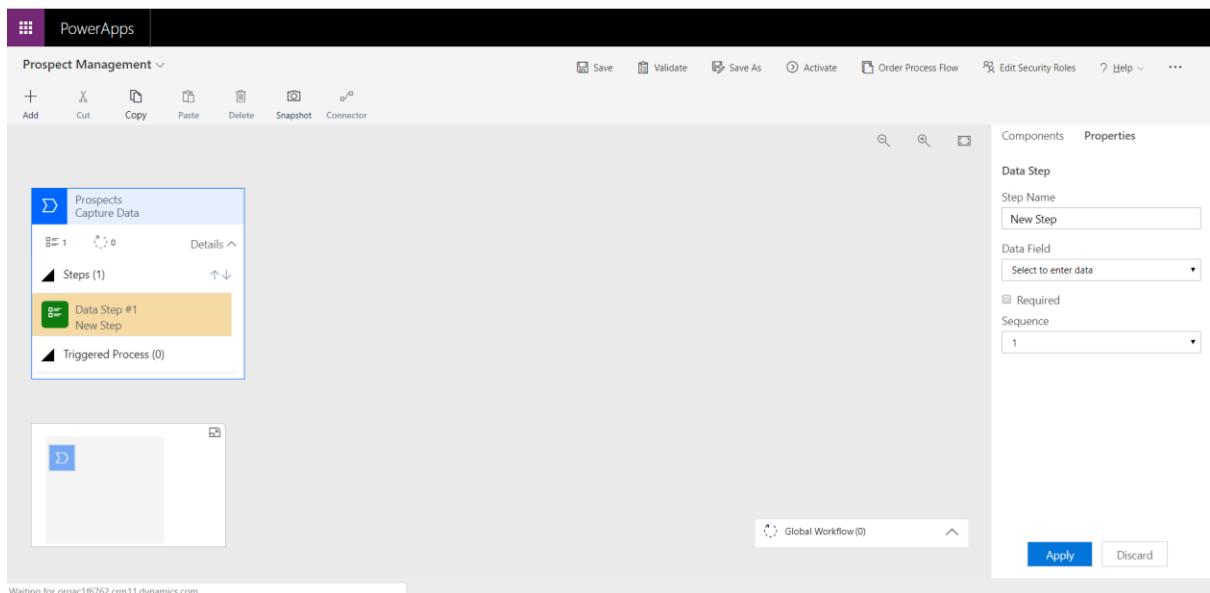
To start off configuring the Prospect Management process, select the first Prospects stage. On the right-hand side, in the “Properties” tab enter in the following information:

1. Display name : “Capture Data”
2. Category : Qualify
3. Entity : Prospects

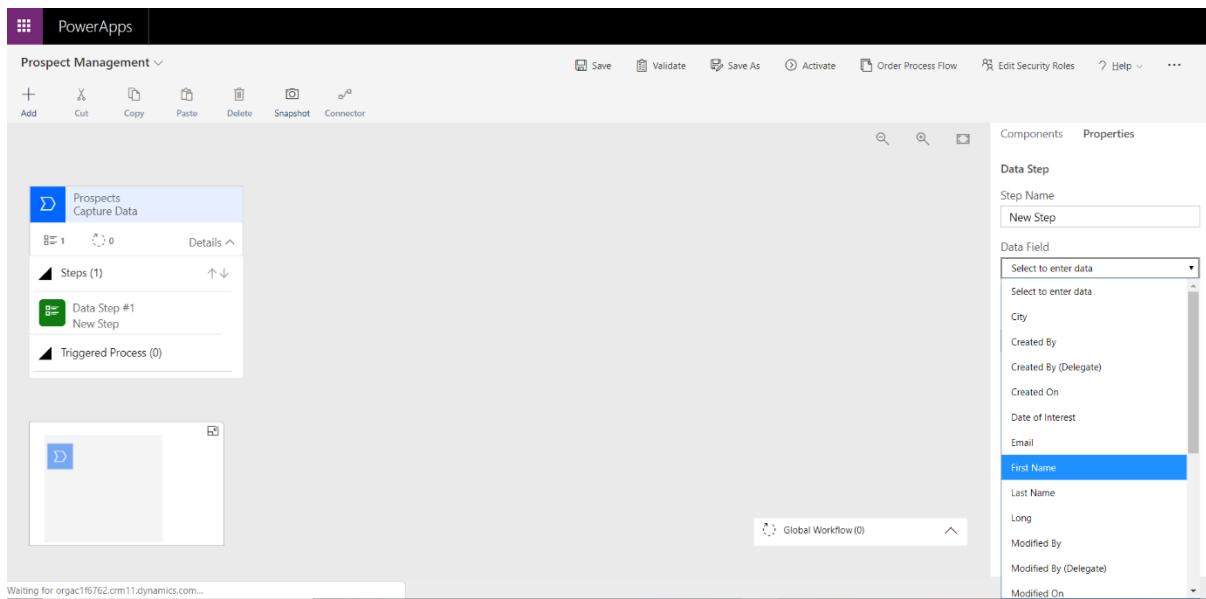
You MUST hit the “Apply” button at the bottom of the properties tab.



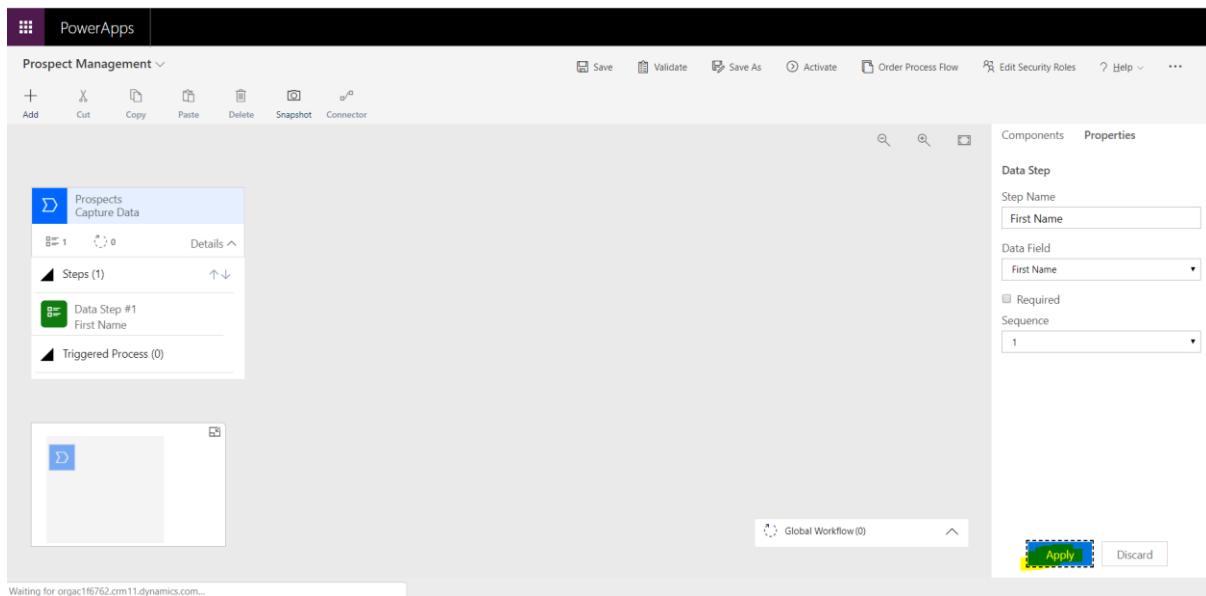
Expand the first stages details section to view the various Data Steps. Select the first Data Step to view the properties pane on the right-hand side.



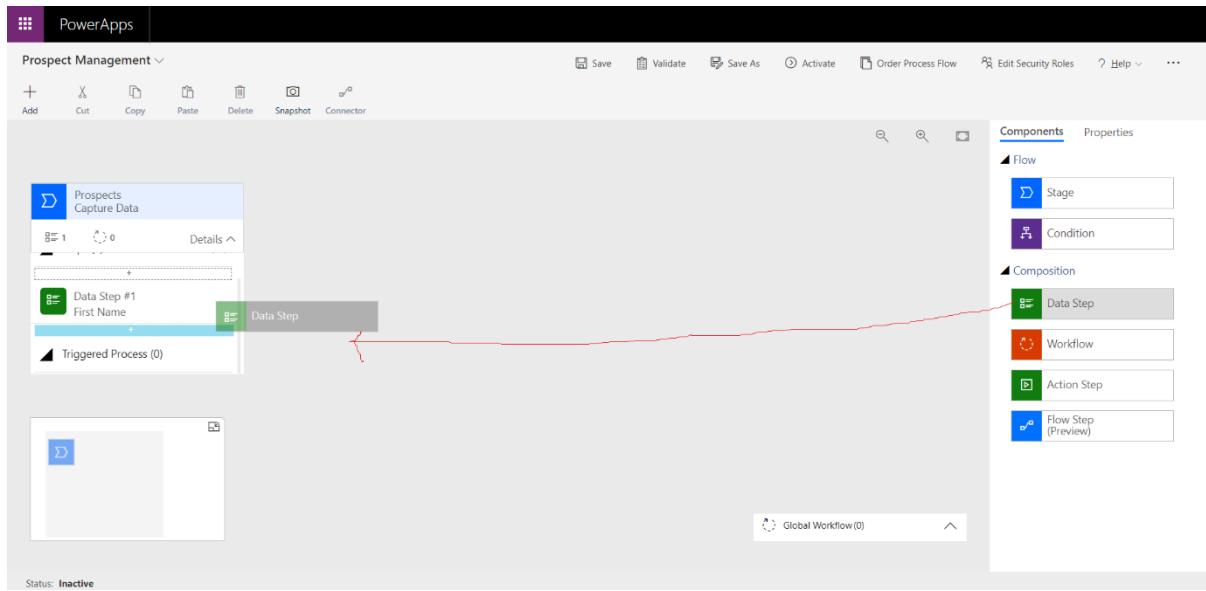
Expand the Data Field option set and select “First Name” value.



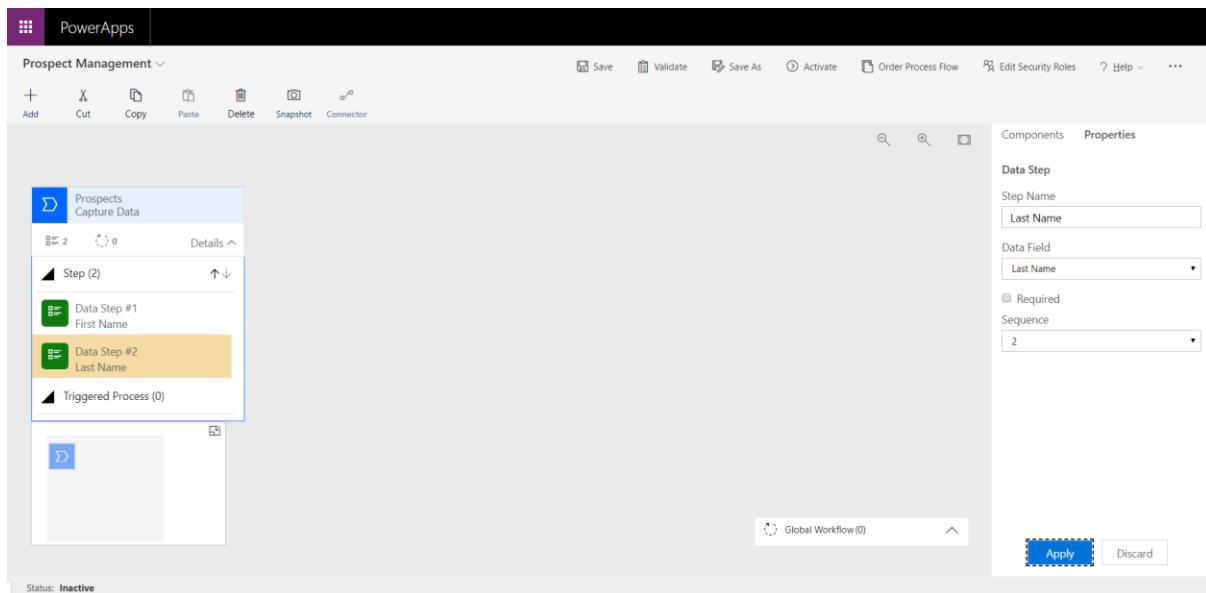
Once selected the “Step Name” property will automatically be changed to the value selected in the “Data Field” property. Select “Apply” at the bottom of the properties pane to apply this update to the data step.



To add a new Data Step to the list of steps within the Process, drag a new Data Step into the area underneath the first step.



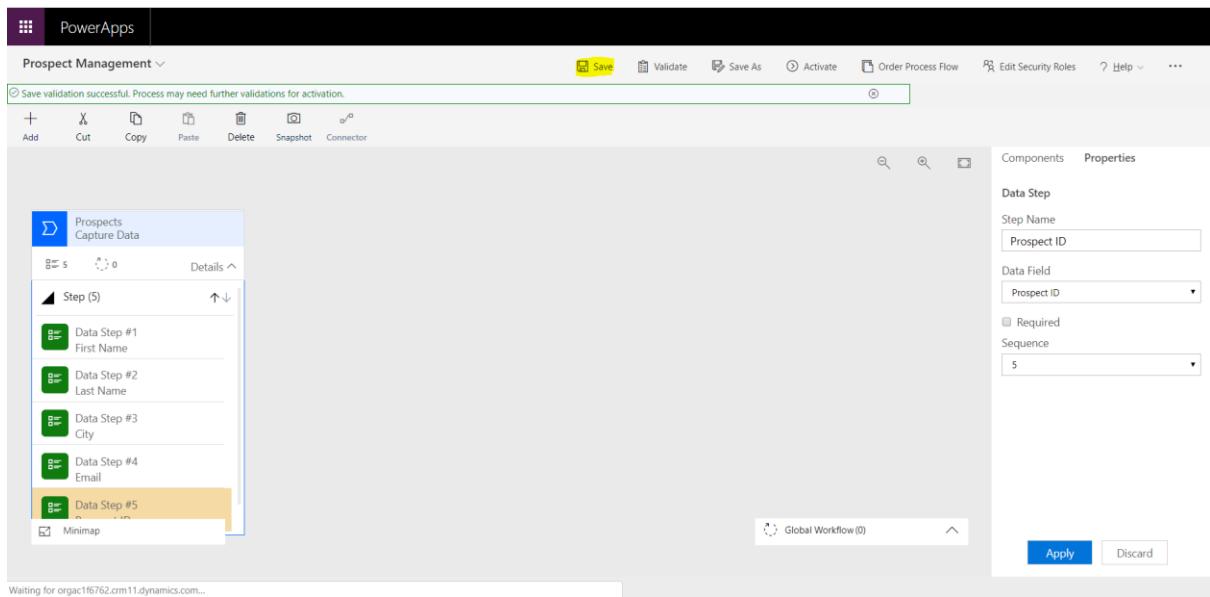
Select “last Name” as the value in the “Data Field” property. Apply this change using the “Apply” button at the bottom of the properties pane.



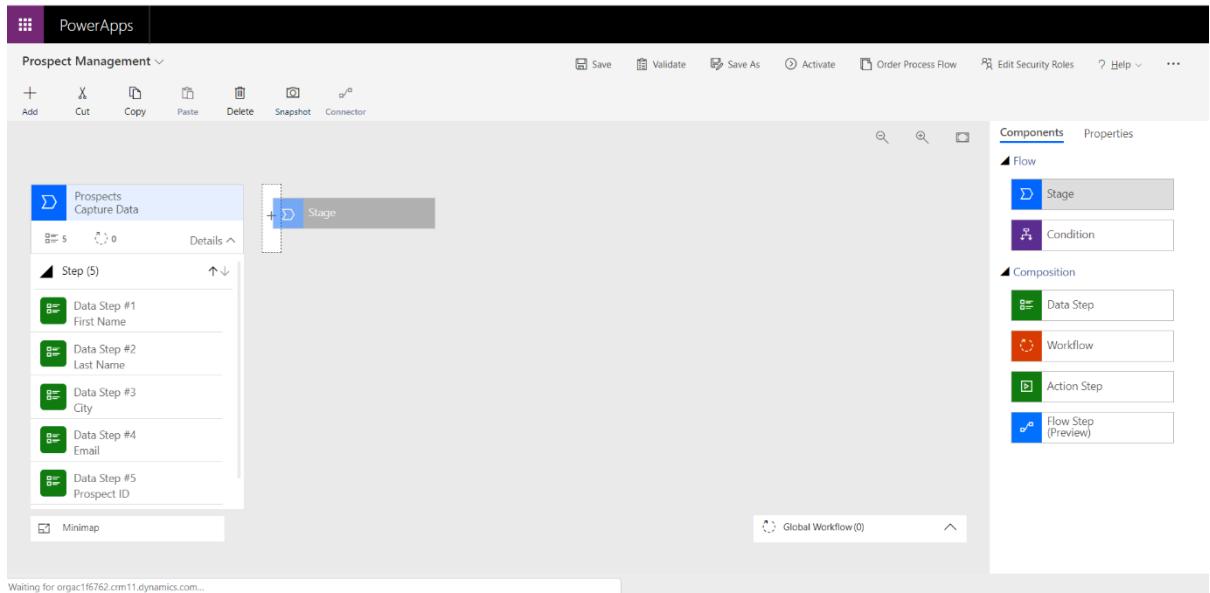
Follow the exact same process as above by adding the below data steps to the first stage:

1. City
2. Email Address
3. Prospect ID

Save your Business Process flow by selecting “Save” from the toolbar at the top of the page.



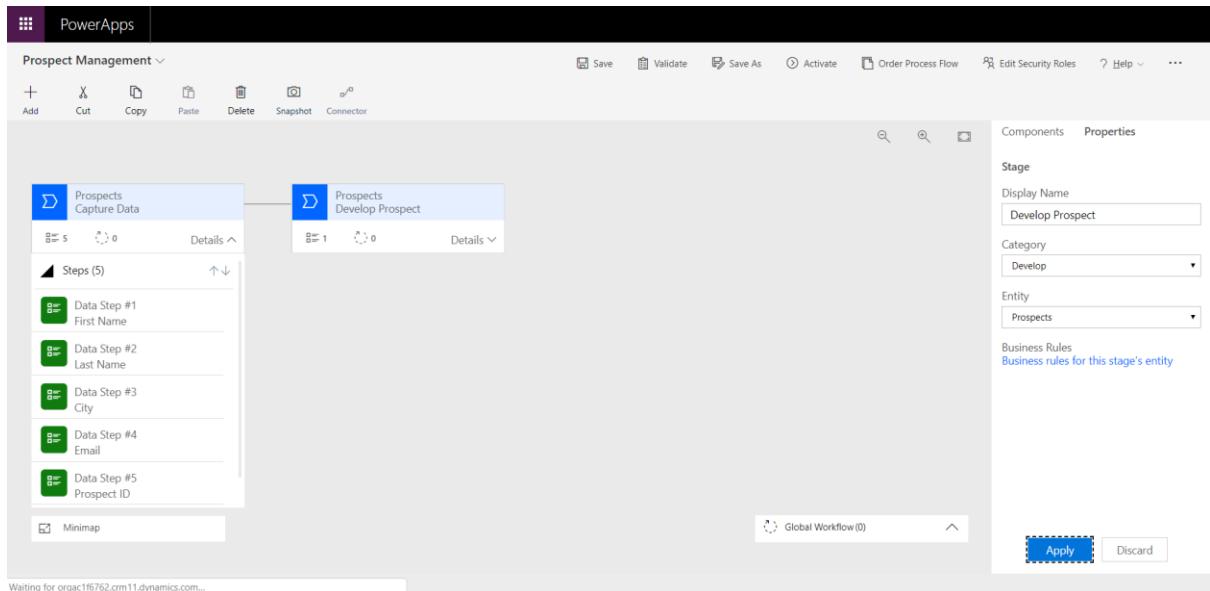
You are now ready to add another stage to your Business Process Flow. Select the “Components” pane from the right-hand side of the page and drag a new stage into the area on the right of the first “Capture Data” stage.



Update the new stage properties with the following information:

1. Display name: “Develop Prospect”
2. Category: Develop
3. Entity: Prospects

Make sure you Apply your changes before adding your data steps.



You now need to add new data steps. As in the [previous data step addition section](#), add in the following Data Steps to this specific stage:

1. Post Code
2. Date of Interest
3. Rating

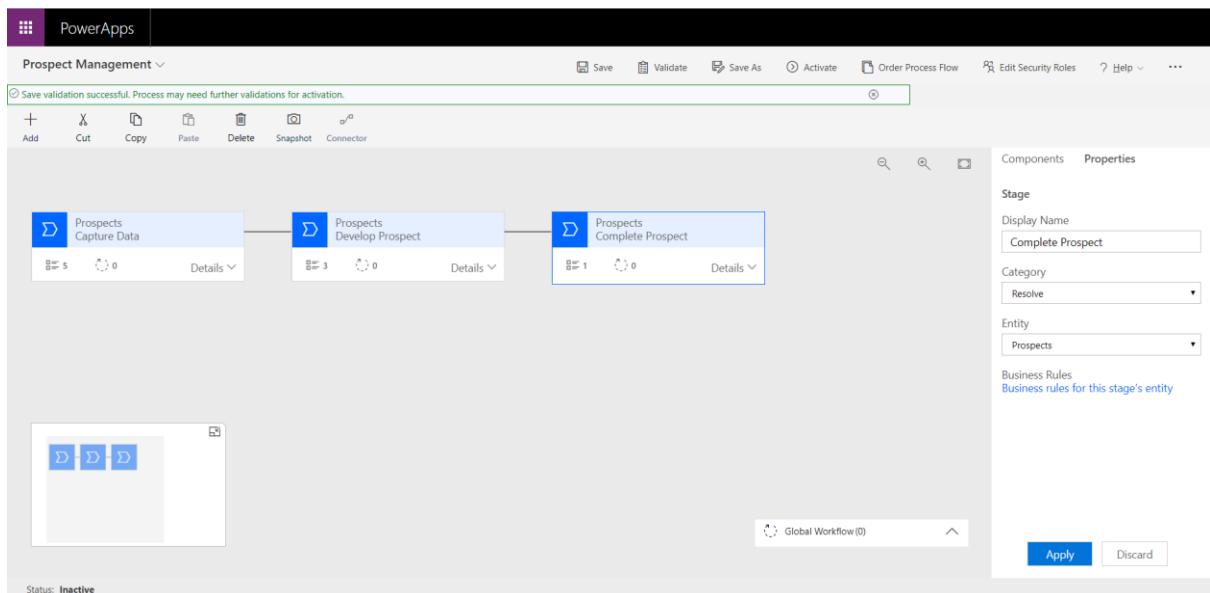
To complete the process, add in one final stage by following the same process in the previous [Process Stage addition section](#). Add the following properties:

1. Display Name: "Complete Prospect"
2. Category: Resolve
3. Entity: Prospects

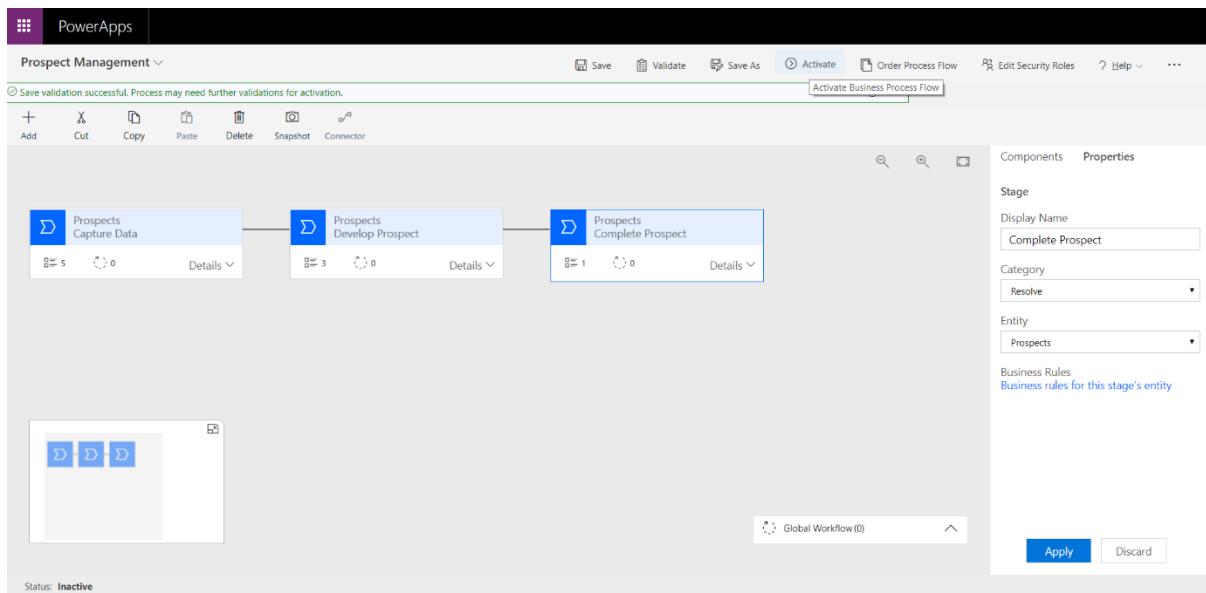
Add in the following Data Steps:

1. Satisfaction Rating

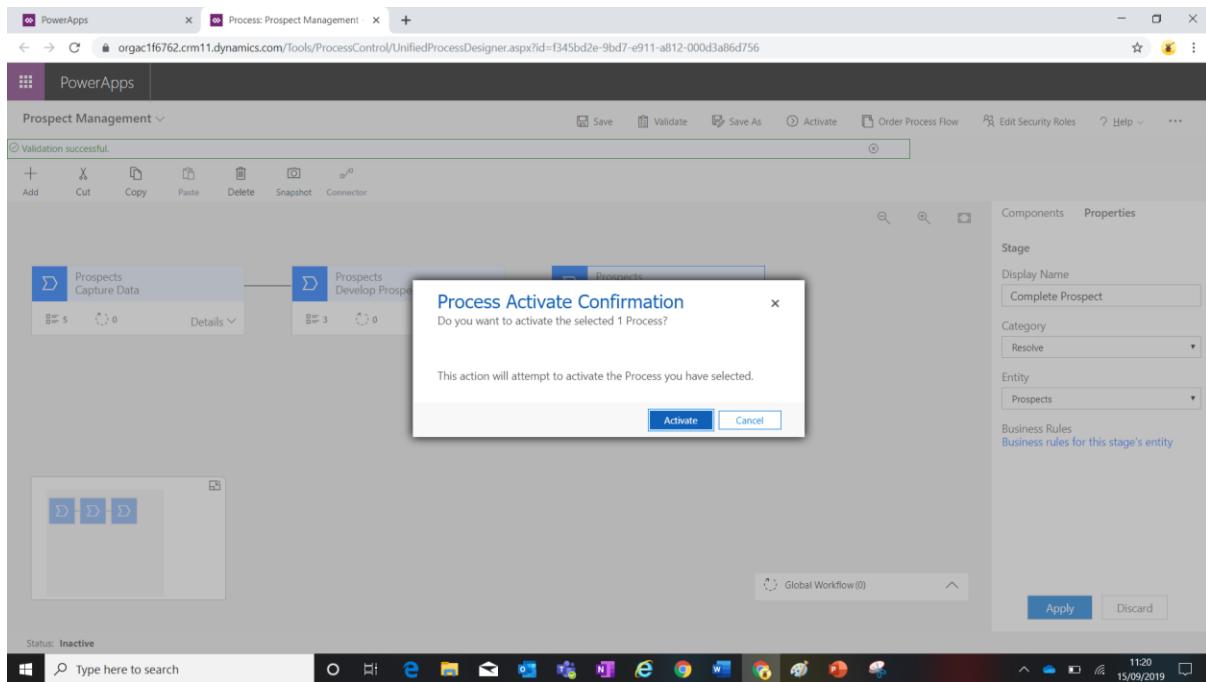
Remember to Apply all changes on all stages and steps and save all changes to the process.



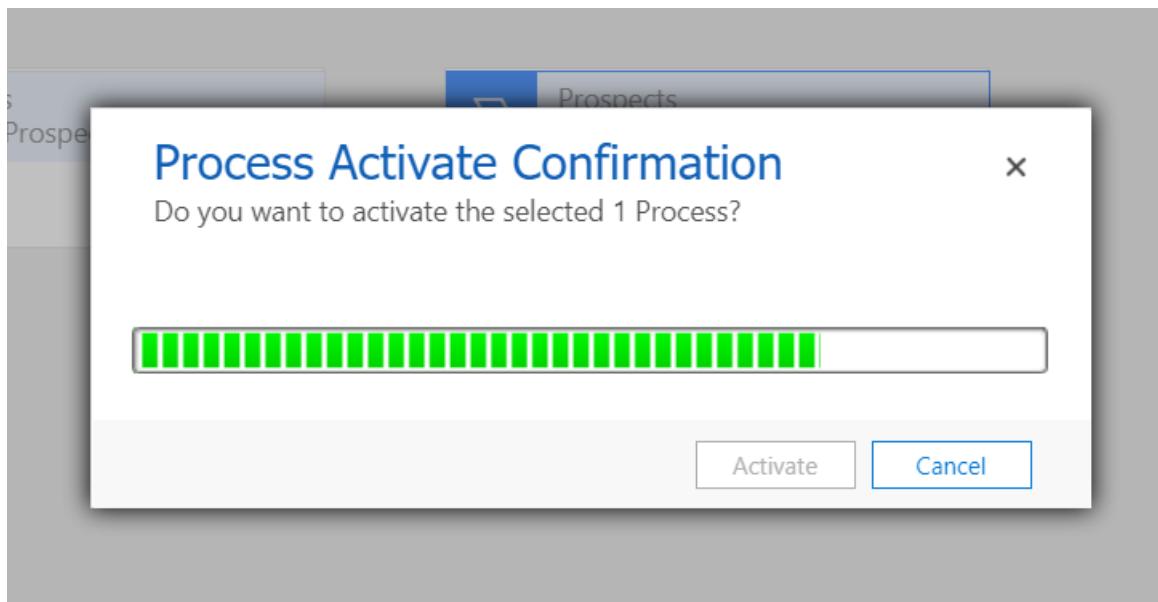
Finally, to activate the business process flow, select the “Activate” button from the toolbar.



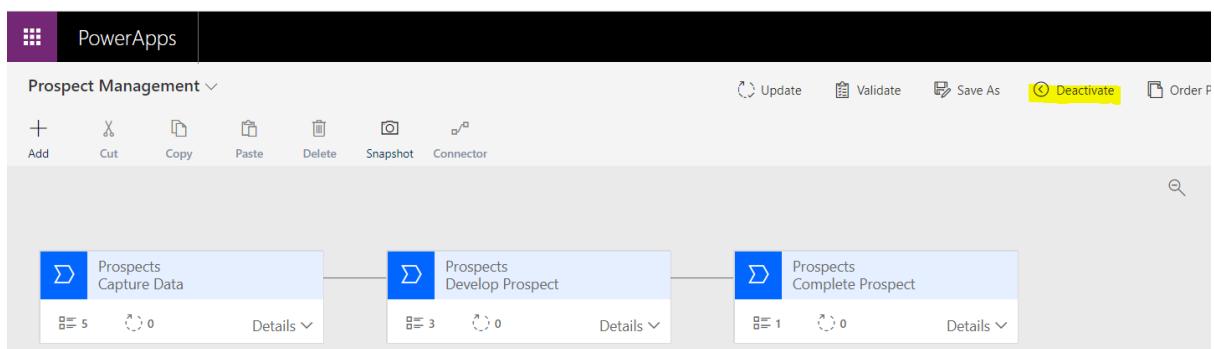
This will start the activation process. Select “Activate” from the popup.



You will see the process starting to activate.



Once activated the “Deactivate” button is then visible in the toolbar in the associated Business Process Flow.



### Model Driven Application

Now that we have created the business process flow, we need to generate the Model Driven Application that will display this to the mid office user.

Open the maker Experience at “make.PowerApps.com” and Navigate to the Apps section in the menu on the left.

PowerApps

Recent apps Shared with me Apps I can edit Org apps

	Name	Modified	Owner	Type	
	Solution Health Hub	...	1 wk ago	SYSTEM	Model-driven

To create a new Model Driven Application, select “Create an App” from the top left of the App screen and then select “Model Driven App”.

PowerApps

+ Create an app ▾ Import package (preview) Microsoft Dynamics 365

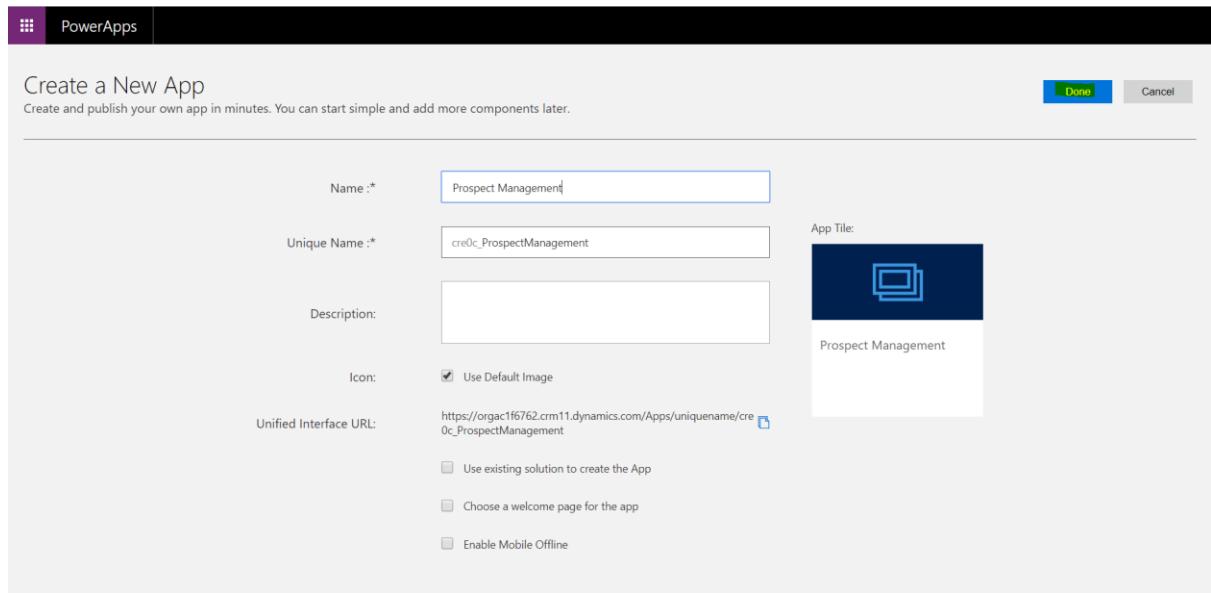
Canvas  
Model-driven  
Portal (preview)

Recent apps Shared with me Apps I can edit Org apps

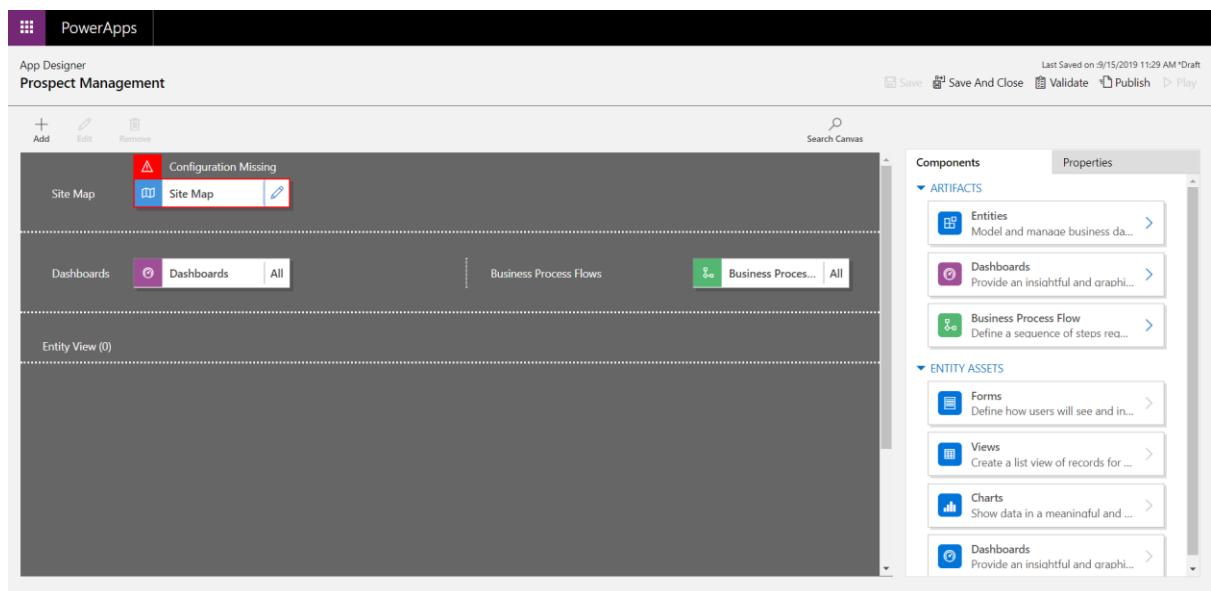
	Name	Modified
	Solution Health Hub	... 1 wk ago

You will then be taken to a new browser tab where you are able to enter in the relevant model-driven application properties to create a new app.

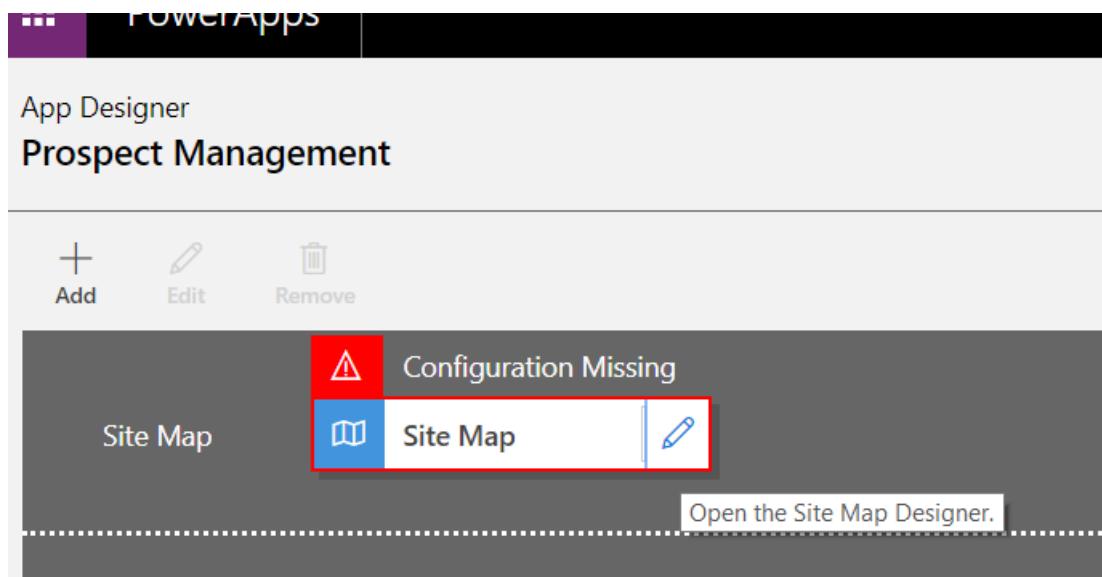
Call the model-driven app “Prospect Management” and select the “Done” button on the right-hand side of the page.



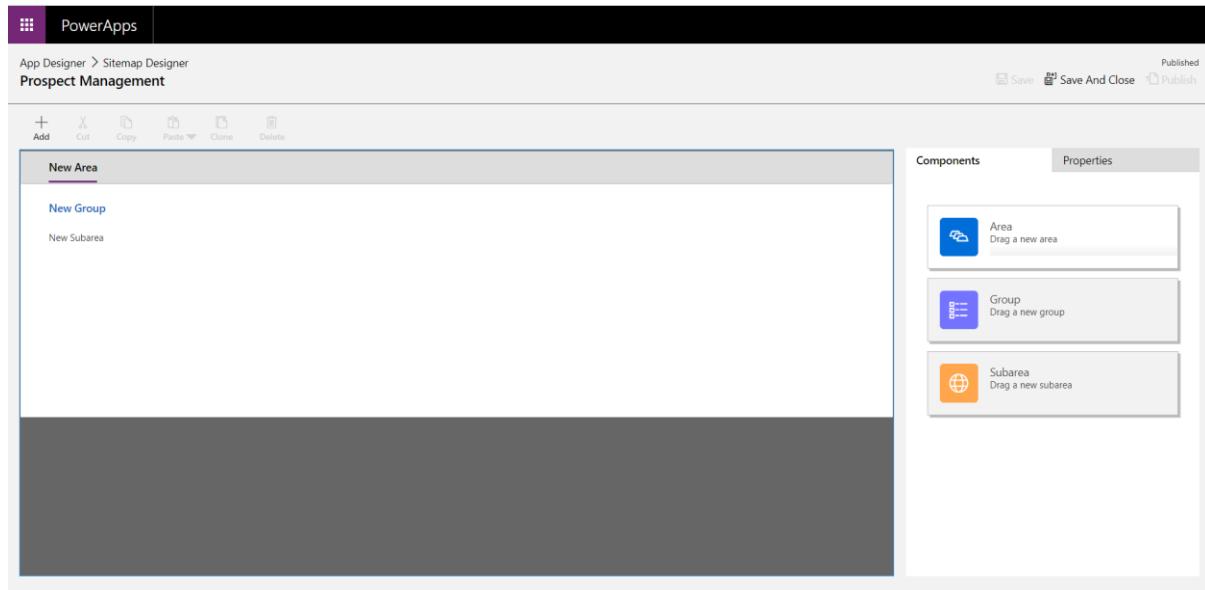
The model-driven app designer screen will be made available to you to begin designing your new app.



To begin designing your app select the “Edit” button on the right of the sitemap configuration node.



This will take you to the Sitemap designer. The experience is slightly similar to that of the business process flow designer. You can drag and drop components to the sitemap from the pane on the right of the page.



To start the configuration, select the “New Area” component in the sitemap.

The screenshot shows the PowerApps Sitemap Designer interface. At the top, there's a toolbar with icons for Add, Cut, Copy, Paste, Clone, and Delete. Below the toolbar, a breadcrumb navigation bar indicates the path: App Designer > Sitemap Designer > Prospect Management. On the right side, there's a ribbon with tabs for Components and Properties. Under the Components tab, a section titled 'AREA' is expanded, showing the 'General' properties. The 'Title (1033)' field contains the placeholder text 'New Area'. Other fields include 'Icon' (a dropdown menu), 'ID \*' (containing 'New\_Area'), and a checked checkbox for 'Show Groups'. A link to 'Advanced' properties is also visible.

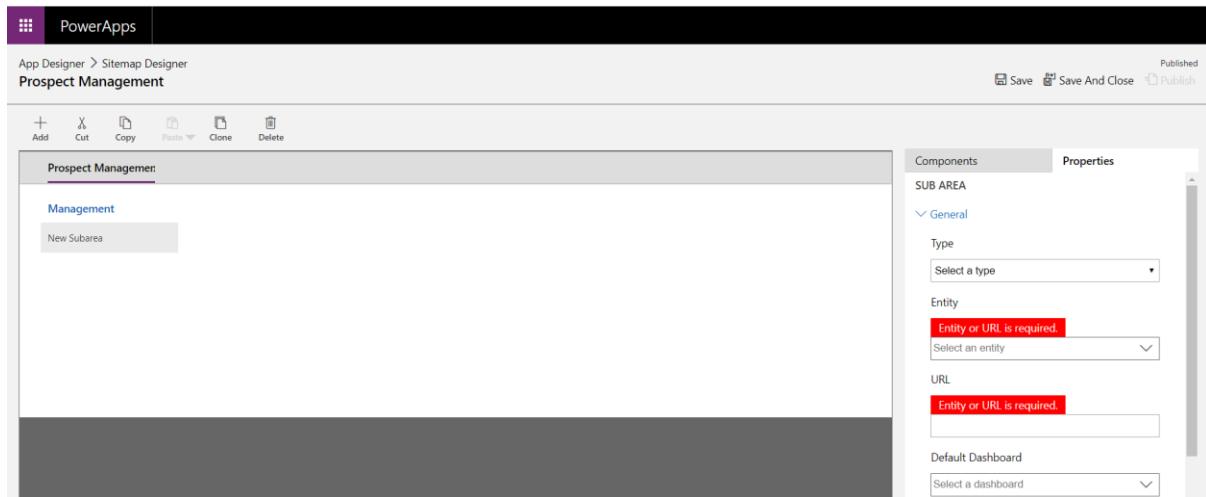
Change the Title to “Prospect Management”.

This screenshot shows the same PowerApps Sitemap Designer interface after the title has been changed. The 'Title (1033)' field now contains the text 'Prospect Management'. The rest of the properties remain the same as in the previous screenshot.

Select “New Group” and change this to “Management”.

This screenshot shows the PowerApps Sitemap Designer interface again. The 'Components' tab is selected, and the 'GROUP' section is expanded. The 'Title (1033)' field for this group is set to 'Management'. The 'ID \*' field is 'New\_Group'. The 'Advanced' link is also visible.

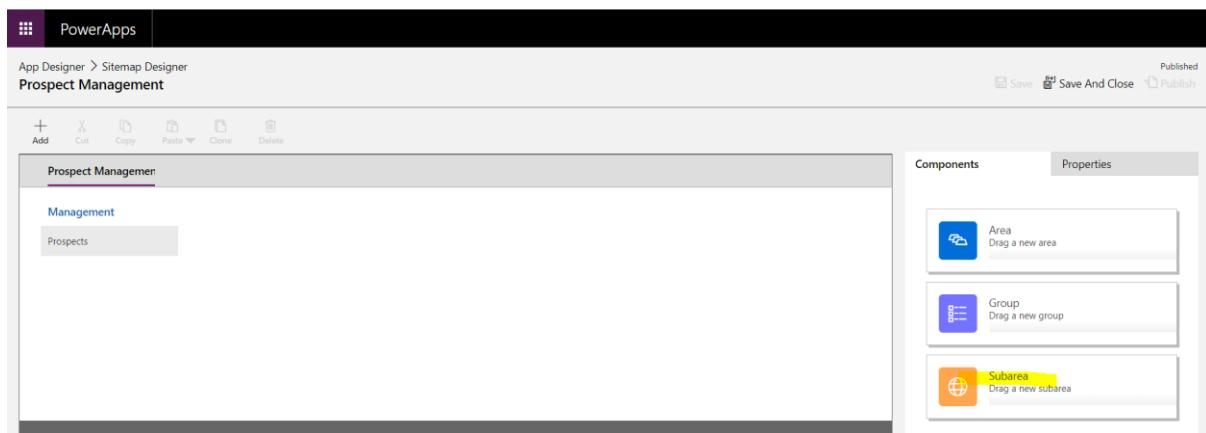
Select the “New Sub area” component



Change the Entity to “Prospects. (you may see another entity in there called Prospect Management, do not select this).



You are going to add a new “Sub Area” component to the Sitemap. Click on the “Prospects” sub area component that you just added. Navigate to the “Components” pane on the right-hand side of the page. You will see that the “Subarea” component is not greyed out.



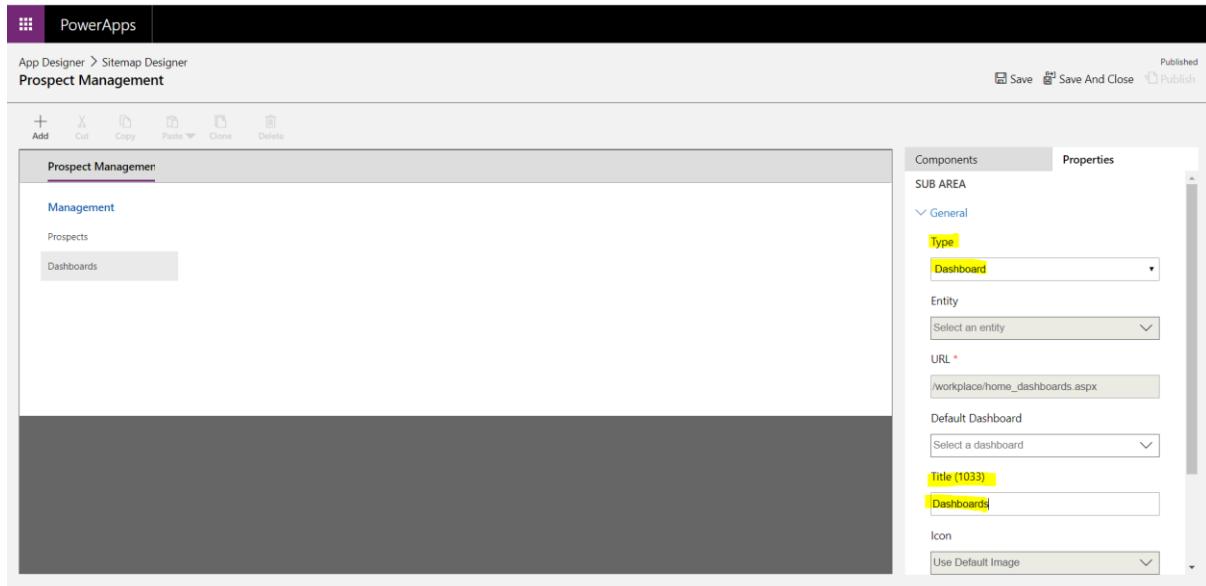
Drag and drop a new “Subarea” component under the Prospects component in the sitemap.



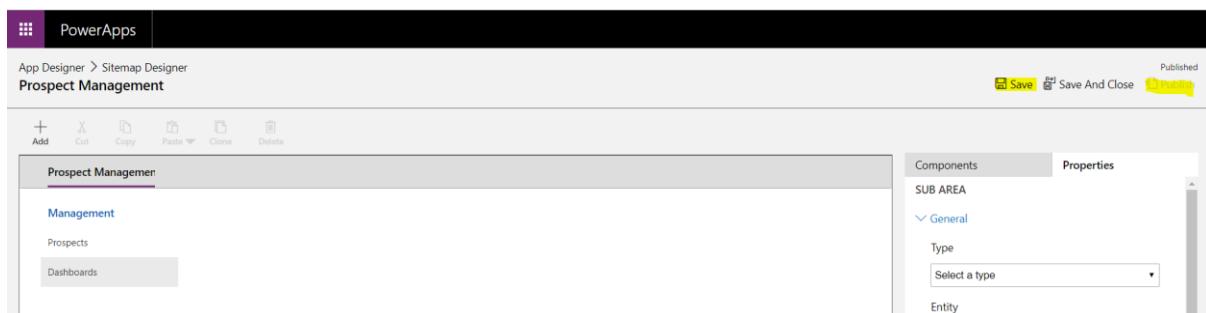
Update the following Subarea properties:

Type: Dashboard

Title: "Dashboards"



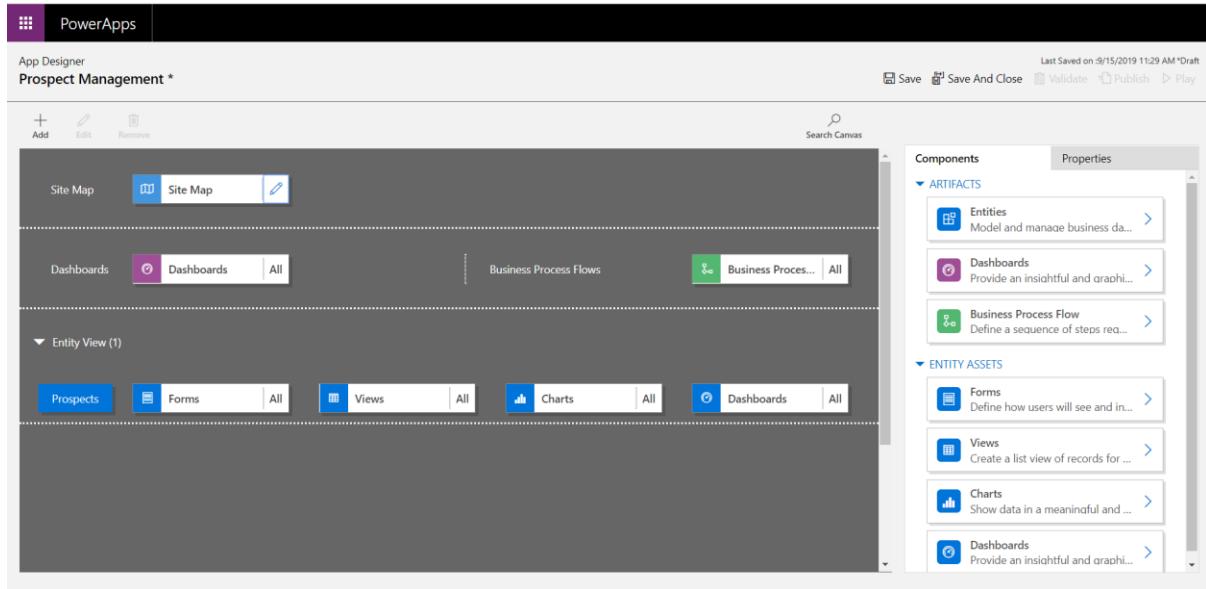
Save and Publish your sitemap changes.



Once this has been published, Save and close your form



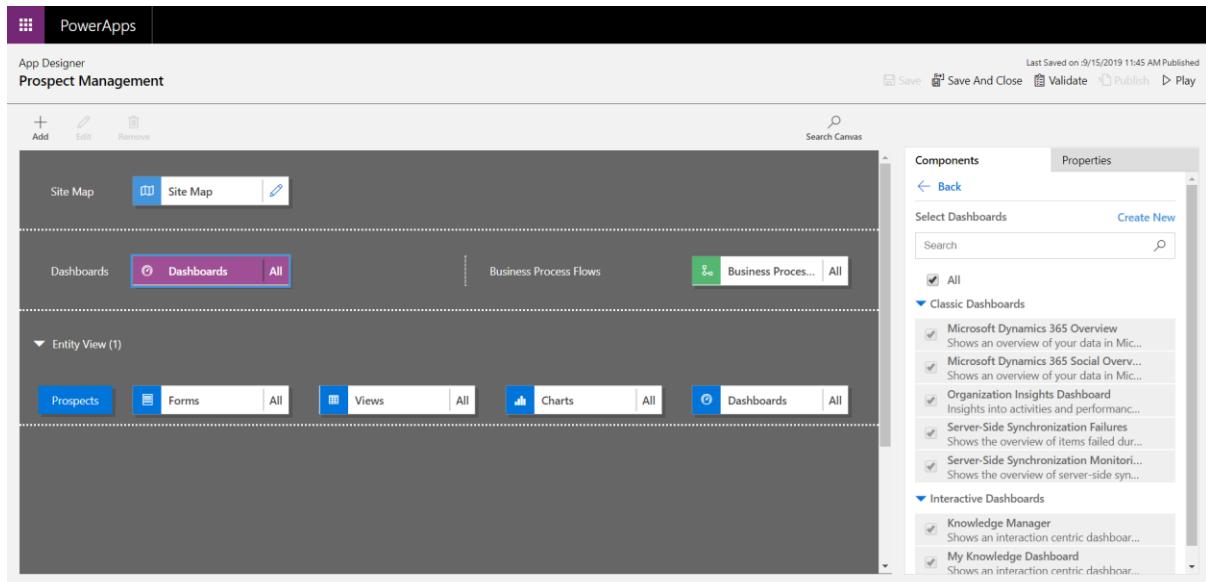
You will now see that the prospect Entity has now been added to your entity list in your application:



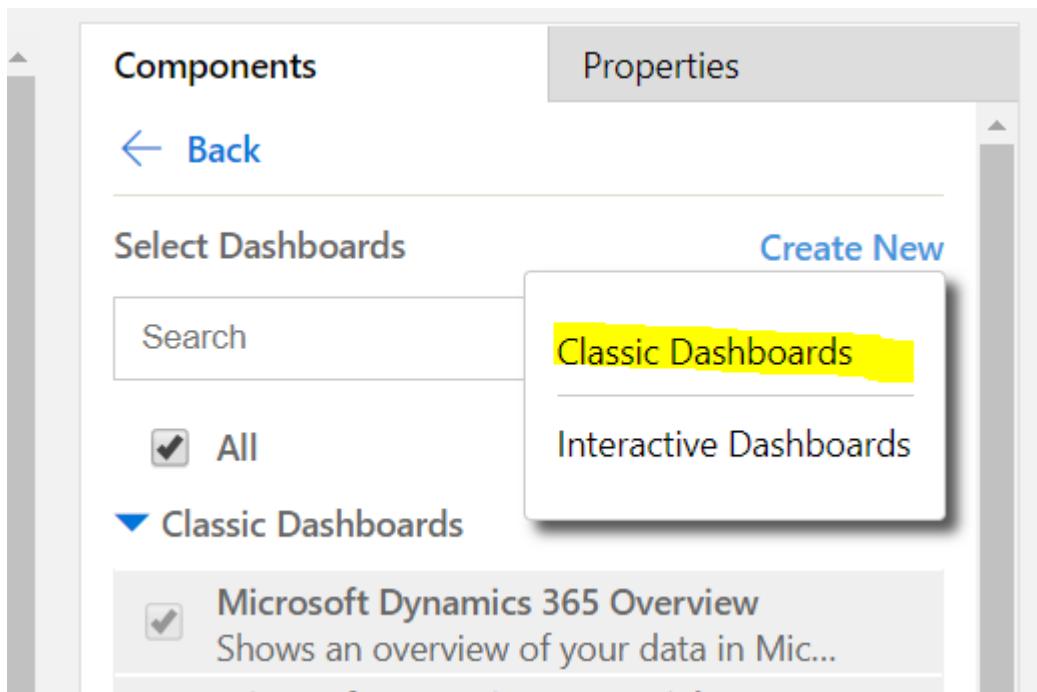
## Dashboards

We now ned to make sure a consolidated view of data is exposed to the users in a more interactive and visual manner. This will require the creation of Dashboards.

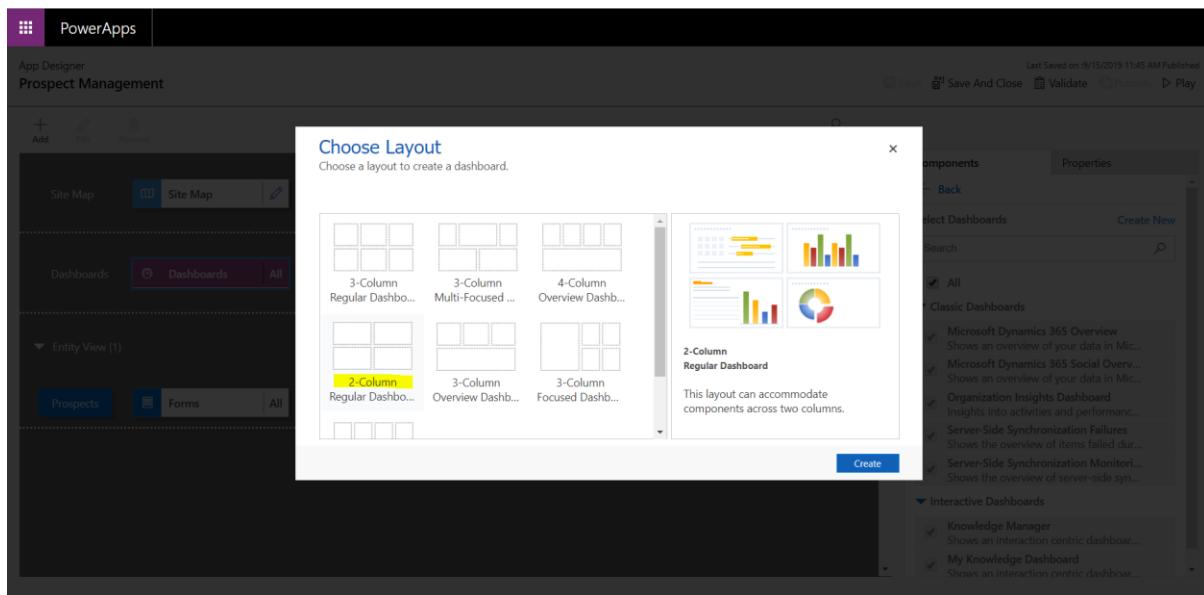
Select the “Dashboards” component from the App Designer and you will see all the available system dashboards on the right in the Components pane.



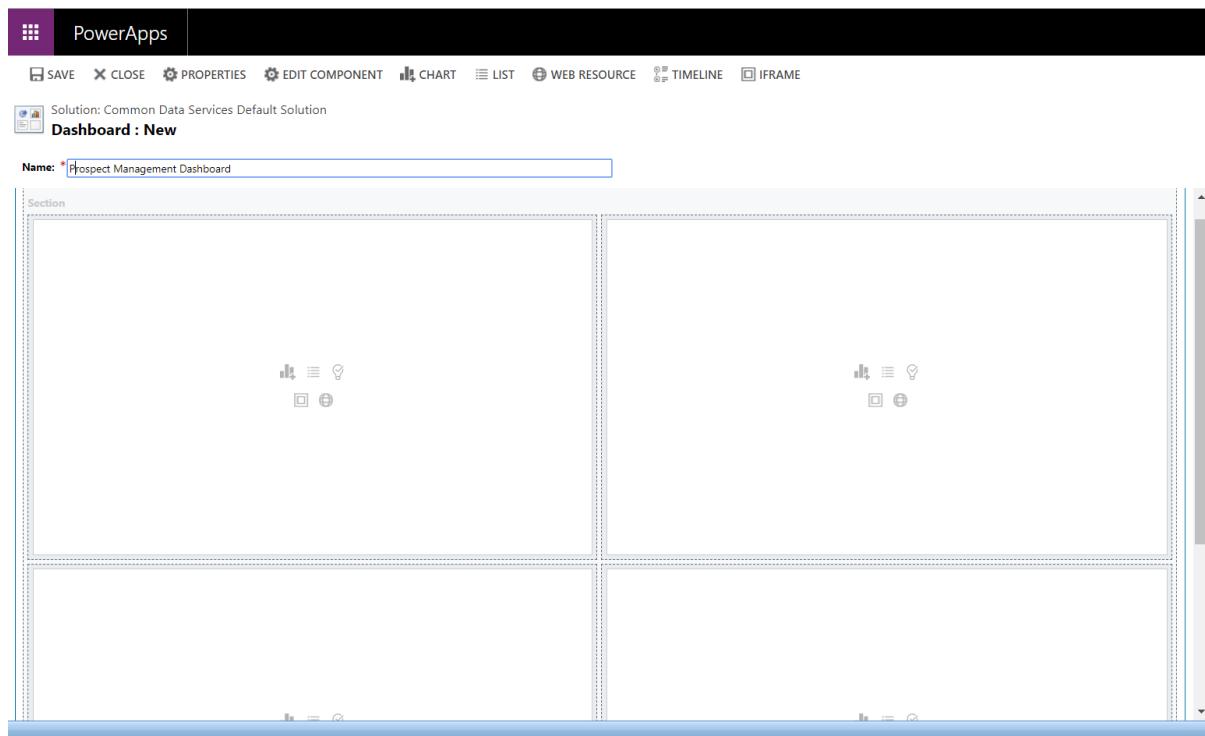
Select “Create New” and then select “Classic Dashboards”.



Select the “2 Column Regular Dashboard” from the layout list and click the “Create” button on the bottom right of the layout selection page.



A new separate browser page will be opened with the Classic Dashboard Designer. Enter in the name for your new Dashboard : “Prospect Management Dashboard”



We are going to add some new lists and charts so that the Mid Office prospect management team have a better understanding of the data that is available to them.

In the first left pane of the designer select the “List” option.



Solution: Common Data Services Default Solution

## Dashboard : New

Name: \* Prospect Management Dashboard

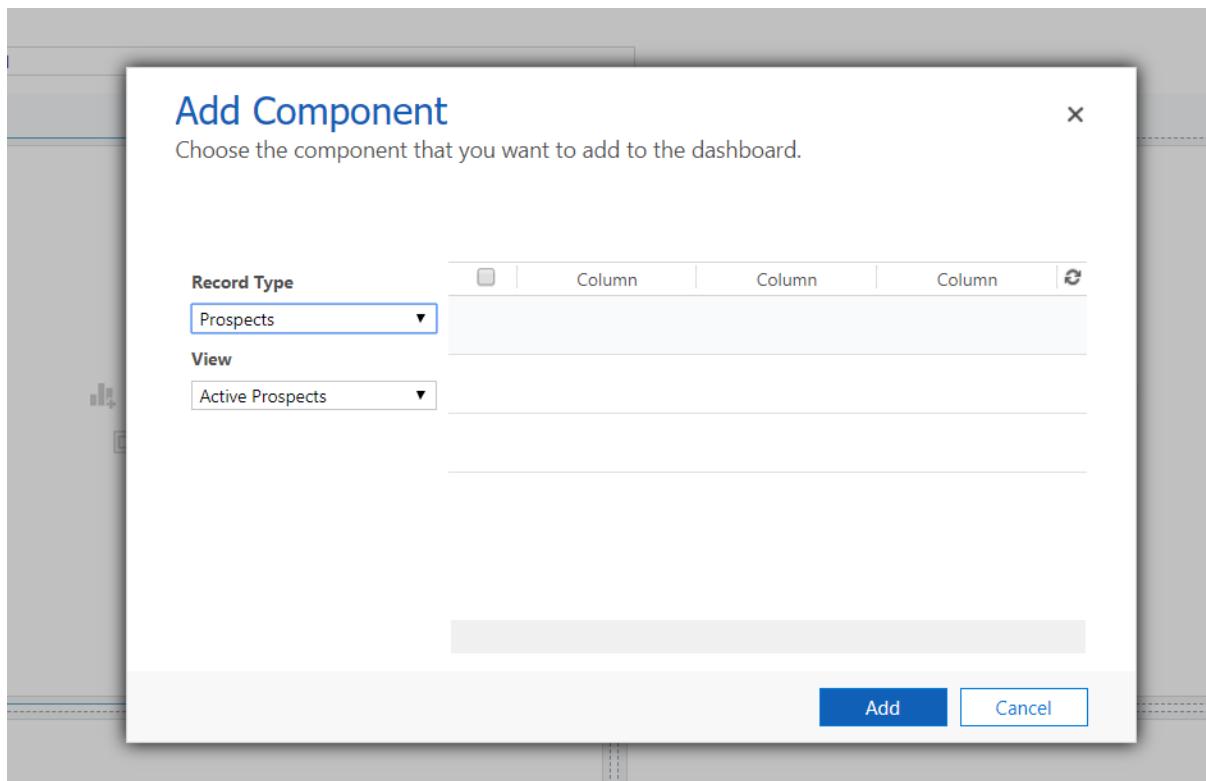
Section



A component selector will then be displayed where you are now able to select the list you would like to add. Select the following:

1. Record Type: Prospects
2. View: Active prospects

Then select “Add”.



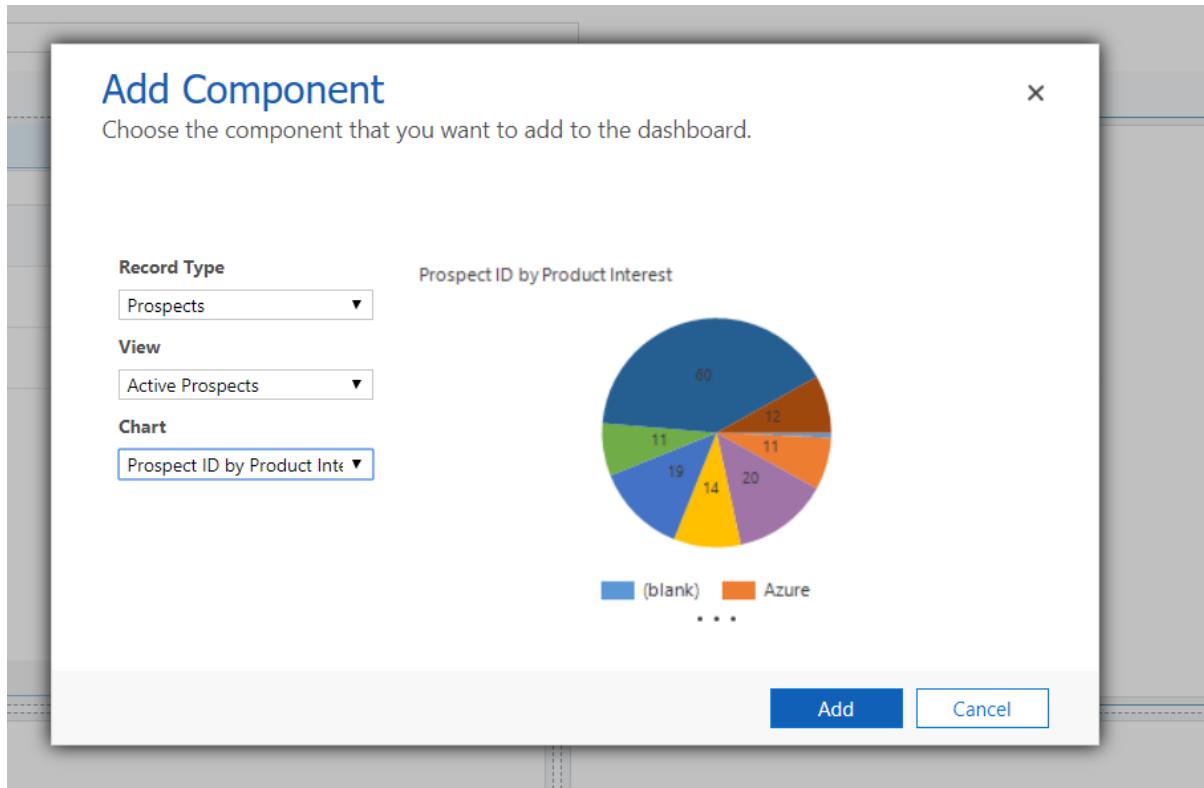
Move onto the top right panel in the Dashboard Designer and select the “Chart” option in the panel.



This will display the Component Selector., where you will be able to select the char that you would like to use. Select the Following Options:

1. Record Type: Prospects

2. View: Active prospects
3. Chart: Prospect ID by Product Interest



Do the same for the next two panes by selecting the following options:

Third Pane:

1. Record Type: Prospects
2. View: Active prospects
3. Chart: Prospect ID by Status

## Add Component

Choose the component that you want to add to the dashboard.

**Record Type**  
Prospects

**View**  
Active Prospects

**Chart**  
Prospect ID by Status

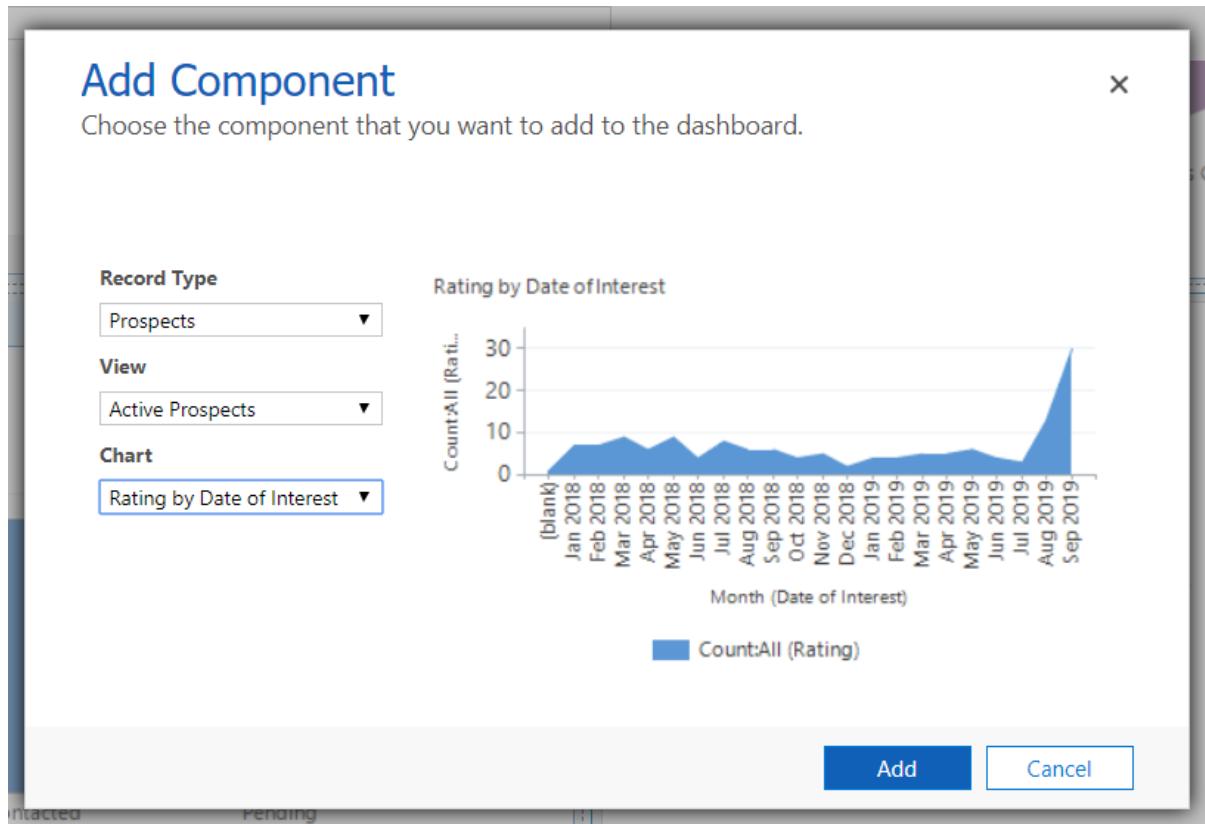
**Prospect ID by Status**

Status	CountAll (Prospect ID)
(blank)	1
Closed	19
Contact...	64
Final S...	22
Pending	20
Under R...	22

**Add** **Cancel**

Fourth Pane:

1. Record Type: Prospects
2. View: Active prospects
3. Chart: Rating by Date of Interest



Ultimately, your Dashboard should look like the image below. Save your Dashboard and then hit the “Close” button.

PowerApps

Solution: Common Data Services Default Solution

Dashboard : New

Name: \* Prospect Management Dashboard

Prospects : View Selector

Chart

Prospect ID by Product Interest

Product Interest	Count
(blank)	60
Azure	13
Dynamics 365 Bus Central	11
Dynamics 365 CE	14
Dynamics 365 FinOps	20
MS Teams	19

Chart

Prospect ID by Status

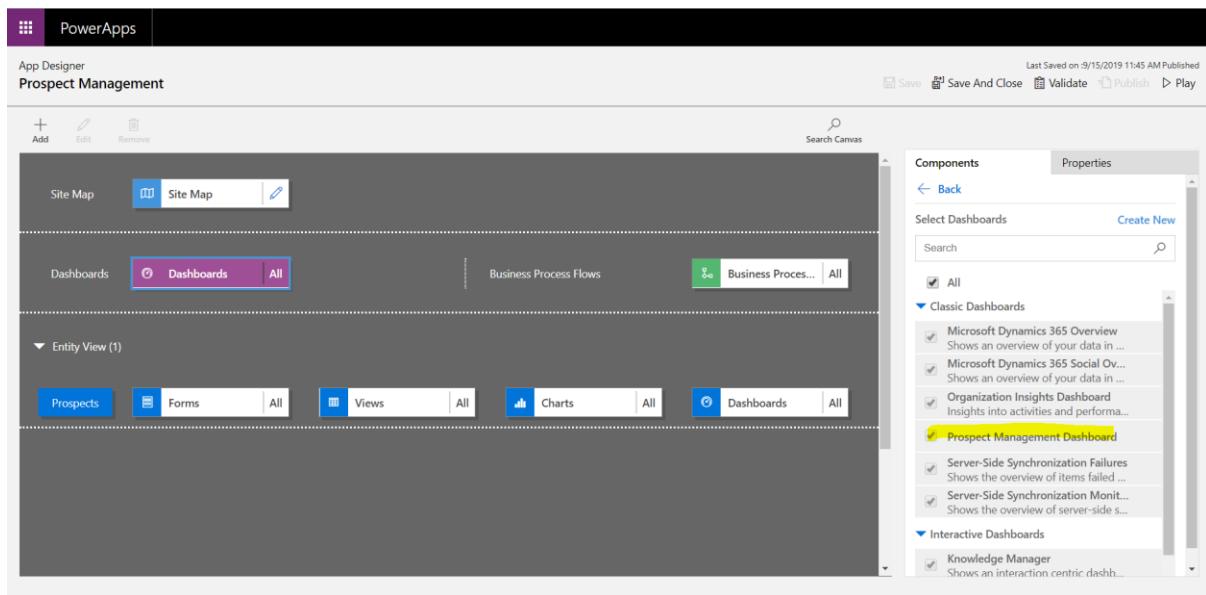
Status	Count
64	64

Chart

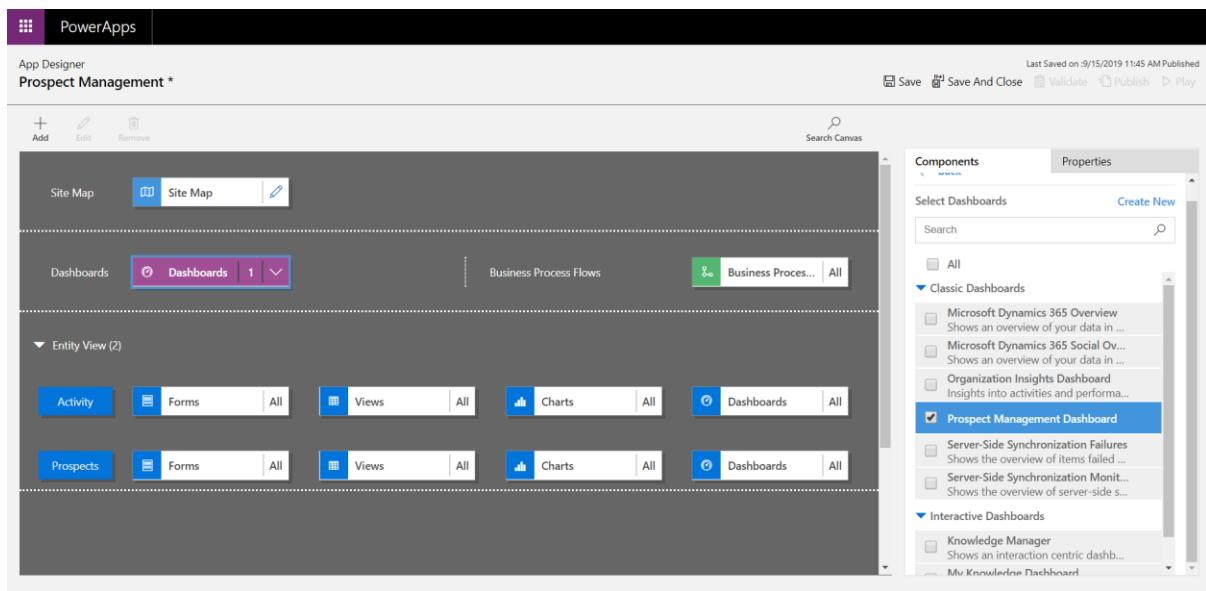
Rating by Date of Interest

CountAll (Rating)

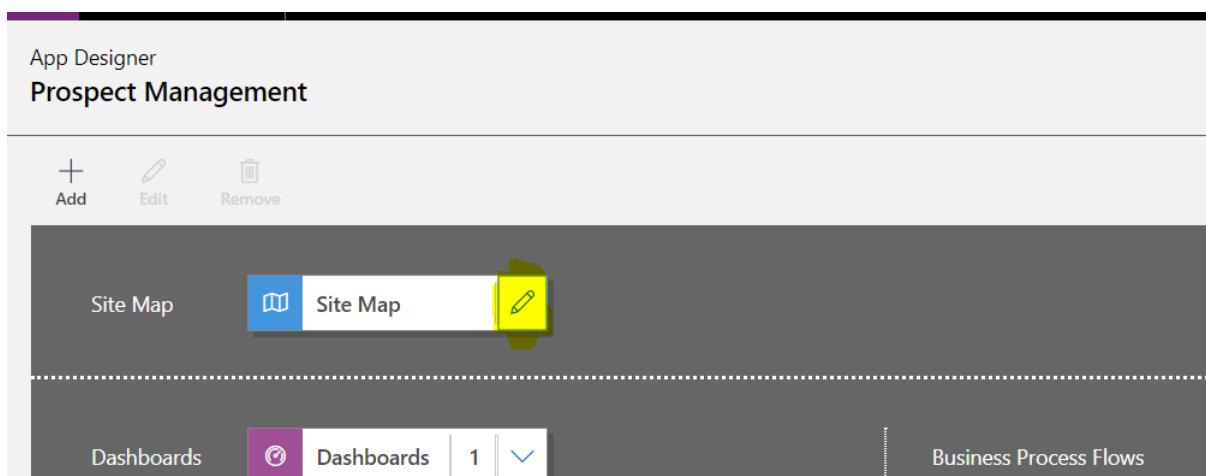
You will then be taken back to the model-driven App Designer experience where you will see your dashboard in the list with the other dashboards. If you do not see it there, simply select another component on the page and then click back into the Dashboards component.



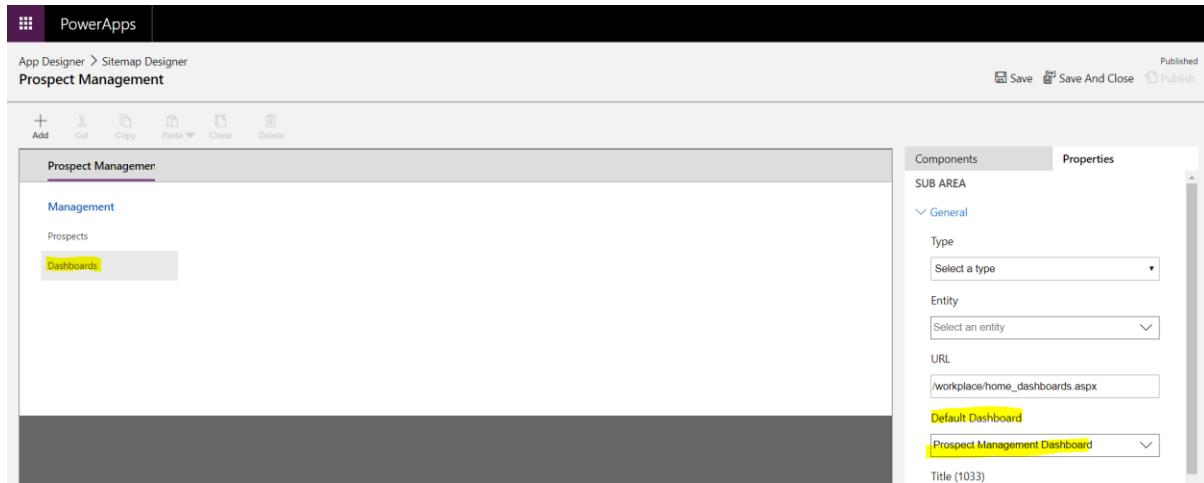
To improve the user experience and only show users information that is relevant to them, deselect all of the dashboards and ONLY select the “Prospect Management Dashboard” from your list.



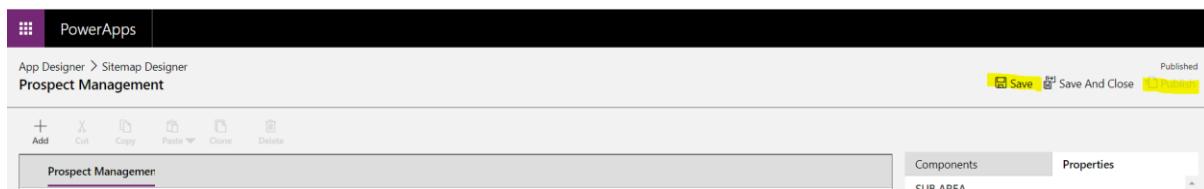
Click to edit your sitemap once again



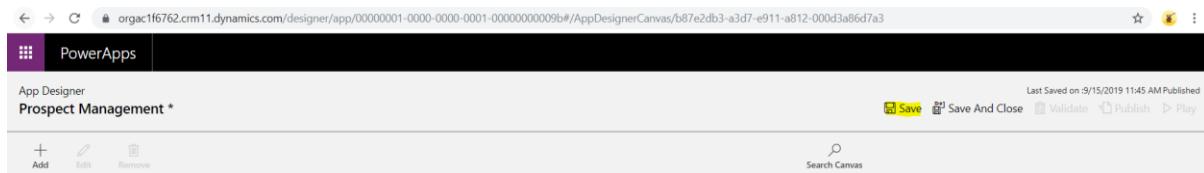
Select your “Dashboards” subarea component from the sitemap and update the default dashboard to “Prospect Management Dashboard”.



Save and Publish the Sitemap as you did previously.



To complete and test your app, firstly “Save” your changes.



Then “Publish” your changes.



Finally, do a global publish by navigating to the maker Experience (make.powerapps.com) and then to “Solutions. Select “Publish all Customisations”. This will publish all the customisations in the system.

The screenshot shows the PowerApps Solutions page. The left sidebar includes options like Home, Learn, Apps, Create, Data (Entities, Option Sets, Dataflows, Connections, Custom Connectors, Gateways), Flows, AI Builder (preview), and Solutions. The main area displays a table of solutions with columns for Display name, Created, Version, Managed externally?, and Solution check. The 'PowerApps Checker' solution is highlighted.

To test the applications, navigate to the Maker Experience ([make.PowerApps.com](https://make.PowerApps.com)) and select “Apps” from the menu. Click on the “Prospect Management” App.

The screenshot shows the PowerApps Apps page. The left sidebar includes Home, Learn, Apps, Create, Data (Entities, Option Sets), and a section for Shared with me, Apps I can edit, and Org apps. The main area shows a list of recent apps, with the 'Prospect Management' app selected and highlighted.

You will be taken to the main Prospect Management App page. This is where you can manage the prospects that get sent to the solution via the sales application. Copy the core page URL and place this into OneNote. It will be in this format : <https://orgac1f6762.crm11.dynamics.com>. You will need this in the Power Bi section.

The screenshot shows the Prospect Management dashboard. The left sidebar includes Home, Recent, Pinned, Management (Prospects), and Dashboards. The main area is titled 'Active Prospects' and displays a list of prospects with columns for Prospect ID, First Name, Last Name, City, Satisfaction, Product In..., Status, and Created On. The 'Prospects' section is selected in the sidebar.

Prospect ID	First Name	Last Name	City	Satisfaction	Product In...	Status	Created On
PRO001	Adrienne	Root	Crieff	1	Power Platform	Contacted	9/8/2019 2:43 PM
Pro002	Andrew	Peach	Romford	2	Dynamics 365 CE	Pending	9/8/2019 2:43 PM
PRO003	Carmen	Vex	Tranent	9	SharePoint	Final Stages	9/8/2019 2:43 PM
PRO004	Dinesh	Nanjiani	Stockton-on-Tees	5	MS Teams	Contacted	9/8/2019 2:43 PM
PRO005	Erlich	Bachman	London	5	Dynamics 365 B...	Under Review	9/8/2019 2:43 PM
PRO006	Fred	Parsons	Carmarthen	9	Dynamics 365 Fi...	Contacted	9/8/2019 2:43 PM
PRO007	James	Peters	Otley	7	Power Platform	Contacted	9/8/2019 2:43 PM
PRO008	Jason	Margera	Looe	8	Power Platform	Final Stages	9/8/2019 2:43 PM

Navigate down to the “Dashboards” to view the data in a different format.

The screenshot shows the Prospect Management Dashboard in PowerApps. At the top, there's a navigation bar with 'PowerApps' and 'Sandbox'. Below it is a sidebar with 'Home', 'Recent', 'Pinned', 'Management', 'Prospects', and 'Dashboards'. The main area displays a table titled 'Active Prospects' with columns: Prospect ID, First Name, Last Name, City, Satisfaction ..., Product Interest, Status, and Created On. A search bar is at the top of the table. Below the table is a navigation bar with letters A-Z.

Use the scroll bar to view the relevant charts associated to the prospect entity.

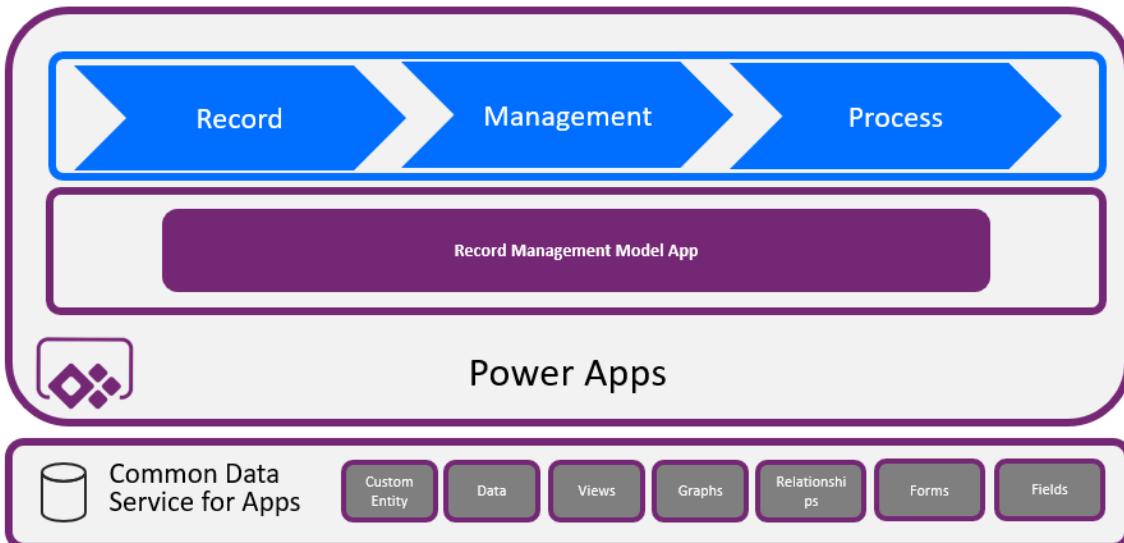
The screenshot shows the Prospect Management Dashboard in PowerApps. At the top, there's a navigation bar with 'PowerApps' and 'Sandbox'. Below it is a sidebar with 'Home', 'Recent', 'Pinned', 'Management', 'Prospects', and 'Dashboards'. The main area displays a pie chart titled 'Prospect ID by Product Interest'. The chart is divided into six segments with values: 60 (green), 20 (orange), 19 (yellow), 14 (purple), 12 (light blue), and 11 (dark blue). A legend below the chart lists categories: Azure, Dynamics 365 Bus Central, Dynamics 365 CE, Dynamics 365 FinOps, MS Teams, Power Platform, and SharePoint.

## Lab 5: Testing

In this lab we will test the full prospect management process starting with the Canvas app and ending with power Bi. This will all be dependant on the labs you have completed in the time allocated.

### Solution Components

PowerApps: Model-driven Apps



## Let's Begin

### PowerApps Model-driven App

1. Open the “Prospect management” model-driven App from the Maker Experience.
2. Look for the record you just created in the prospects view. Preferably search by the prospect ID or created on Date.
3. Open the record and notice the Business process flow.
4. Take the record through the process flow by entering in data where necessary.

## Final Learnings

The Microsoft Power Platform provides immediate value to businesses in an incredibly short amount of time by allowing users the ability to create solutions to solve problems and fill gaps in organisations typical SaaS type applications cannot normally solve. It's Flexibility and ease of use provide makers with a performant, scalable and affordable platform that has the capacity to be adopted in all areas of the business.

