

A Tiny Power Platform Hackathon



Author: Chris Huntingford

Email: Chris.Huntingford@Microsoft.com

Contents

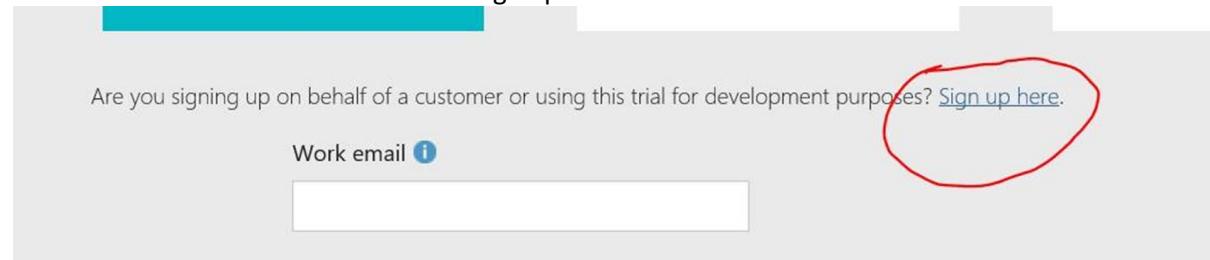
Prerequisites	3
Introduction	4
How to Hack?	5
All or Nothing	5
Go Rogue.....	5
Double or Nothing.....	5
Dream Team.....	5
Business Case	5
The Solution	6
Core Solution Components	6
Lab 1: Data & Common Data Service (CDS) - Mandatory	7
Solution Components	7
Let's Begin	8
Lab 2: Configuring Forms, Views & Charts in the CDS*	18
Solution Components	18
Let's Begin	19
Form Configuration	20
View Configuration	22
Charts Configuration	26
Lab 3: Configuring your Business Process Flow and Model Driven App experience	31
Solution Components	31
Let's Begin	32
Business Process Flow.....	32
Model Driven Application	40
Dashboards	46
Lab 4: Configuring your Microsoft Flow Notifications*	57
Solution Components	57
Let's Begin	58
Microsoft Flow	58
Lab 5: Configuring a Basic Power BI Dashboard* (Optional)	62
Solution Components	62
Let's Begin	62
Power BI Desktop.....	62
Lab 6: Configuring the Sales Canvas App*	77

Solution Components	77
Let's Begin	78
PowerApps Canvas App	78
Lab 7: Testing*	97
Solution Components	98
Let's Begin	98
PowerApps Canvas App	98
PowerApps Model-driven App.....	98
Microsoft Flow	98
Power BI	98
Final Learnings	99

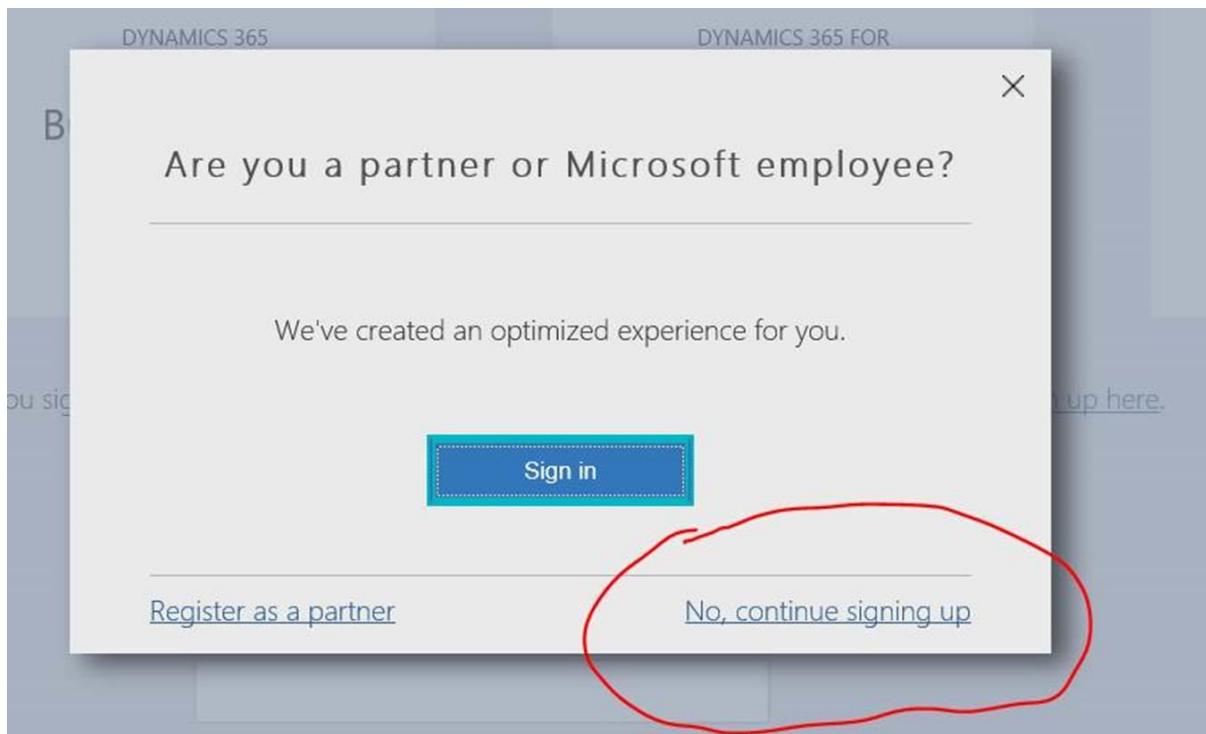
Prerequisites

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

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.



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

Introduction

Welcome to "A Tiny PowerPlatform Hackathon" This walk through is designed to take you through various core 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.

How to Hack?

The key part of this Hack is the data supplied in the excel sheet. The ability to get the data into the CDS is of vital importance, Therefore Lab number 1 is Mandatory. After that you are able to select the Labs you would like to do as there is not always an interdependancy between labs, OR you may build what ever you would like on top of the data, as long as it solves the business problem. Any lab that has a title with a * means that it can be done independantly of the others (based on the completion of Lab 1). The below table will help you understand the dependancies.

Lab Title	Technology	Dependencies
Lab 1: CDS	Common Data Service	Lab 1
Lab 2: Forms, Views Charts	Common Data Service	Lab 1
Lab 3: Business Process Flow, Model Apps & Dashboards	Flow & PowerApps	Lab 1 & Charts from Lab 2
Lab 4: Microsoft Flow	Flow	Lab 1
Lab 5: Basic Power BI	Power BI	Lab 1
Lab 6: Canvas Apps	PowerApps	Lab 1 & Power BI Dashboard from Lab 5
Lab 7: Testing	All	All

There are a number of ways that you could approach this hack. These are as follows:

All or Nothing

Go right ahead and try and knock out this entire hack in the time alocated. This whole build can be achieved in less than 45 min by an experienced Maker.

Go Rogue

Get the data int the Common Data Service in Lab 1 and then build something completely unique on top of it. Do what works for you...

Double or Nothing

Couple up and split the work. Get someone to do the CDS & Model driven related configuration and the someone else to do the Power BI, Flow and Canvas App build. This has proven to work very well as both areas do not conflict.

Dream Team

Get a team together, knock out the first lab and then allocate each lab to a different person. This is also totally doable as various areas do not intersect but work well together.

Business Case

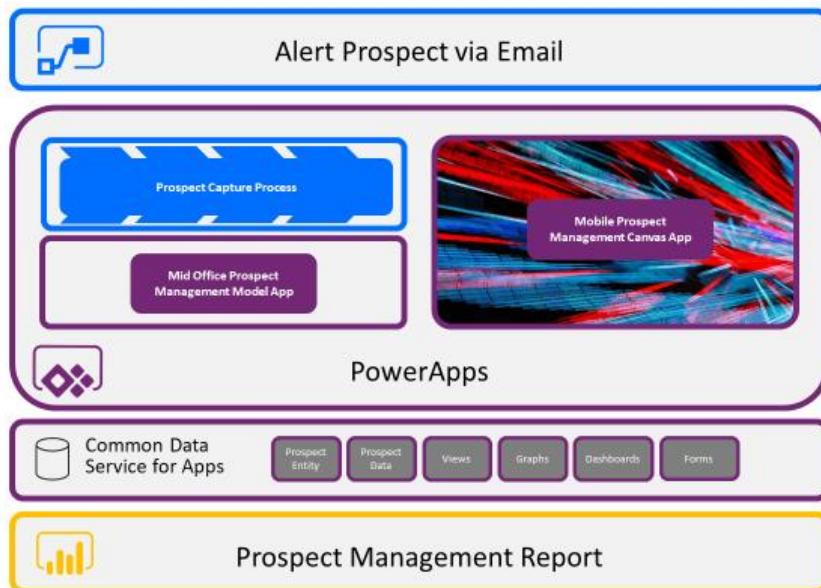
An organisations sales representatives spend many hours at trade shows and events talking to various prospects. They collect multiple business cards and Linkedin connections but have no simple mechanism to capture the conversation had with prospect as well as gain several other important details they need in order to progress the conversations. This means that often these interactions do not have any follow-up and therefore potential sales are lost and these interactions are wasted.

Typically, the Sales people will capture their prospects into several excel sheets, which are then emailed through to their regional office for consolidation and mid office follow up. There is literally now security or process associated to the way these prospects are dealt with.

Finally, there is little to no reporting or insights which could help the organisation understand a little more about how their prospects are being interacted with or converted to actual, real accounts or leads.

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. **Power Apps (Canvas Apps):** The Sales operatives in the field will leverage a simple canvas app to help capture the prospect data as well as expose simple analytics.
5. **Microsoft Flow:** Notifications will be sent to the relevant users by leveraging Microsoft Flow to automate simple interactions.
6. **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.
7. **Power BI:** To gain full insights and analytics on the relevant prospect data, Power BI will be leveraged as the reporting mechanism to expose the prospect information.

Microsoft Power Platform - Analyse. Act. Automate.

One low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications – both cloud and on-premises



Lab 1: 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.

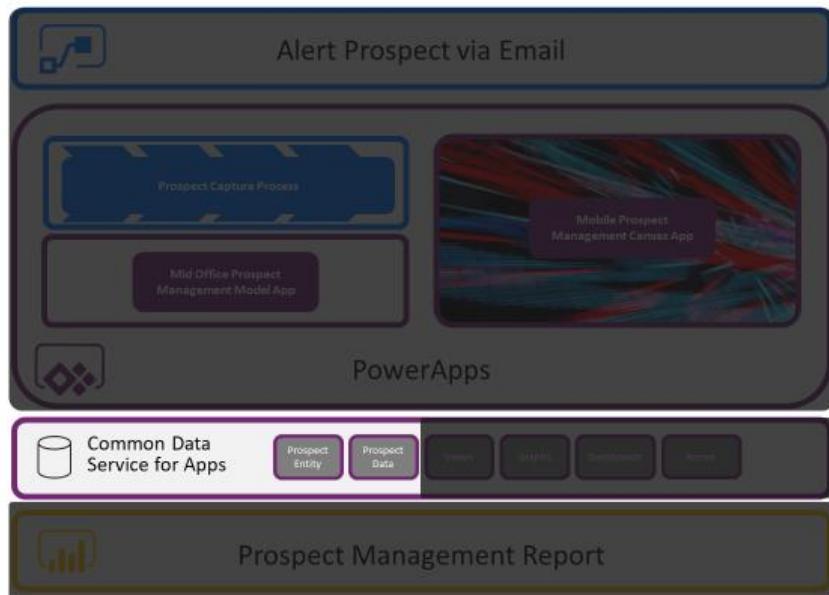
Please Note:

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 PowerApps interface with the following details:

- Header:** Shows 'PowerApps' in the top left, a search bar, and a 'Search' button.
- Environment Selection:** A dropdown menu labeled 'Environment' is open, showing 'AIAD01 (orgac1f6762)'.
- Message:** A red box highlights the dropdown, and an arrow points upwards to a message: 'Change Your Environment here! Do not Use Default!'
- Left Sidebar:** Under 'Apps', it shows 'Recent apps', 'Shared with me', 'Apps I can edit', and 'Org apps'. Under 'Data', it lists 'Entities', 'Option Sets', 'Dataflows', 'Connections', 'Custom Connectors', 'Gateways', 'Flows', 'AI Builder (preview)', and 'Solutions'.
- Table:** A table titled 'Apps in AIAD01 (orgac1f6762)' shows one item: 'Solution Health Hub' (Modified: 5 d ago, Owner: SYSTEM, Type: Model-driven).
- Page URL:** The page URL is <https://make.powerapps.com/environments/242d8ea6-d102-4170-a874-69ddf142a1ee/entities>.

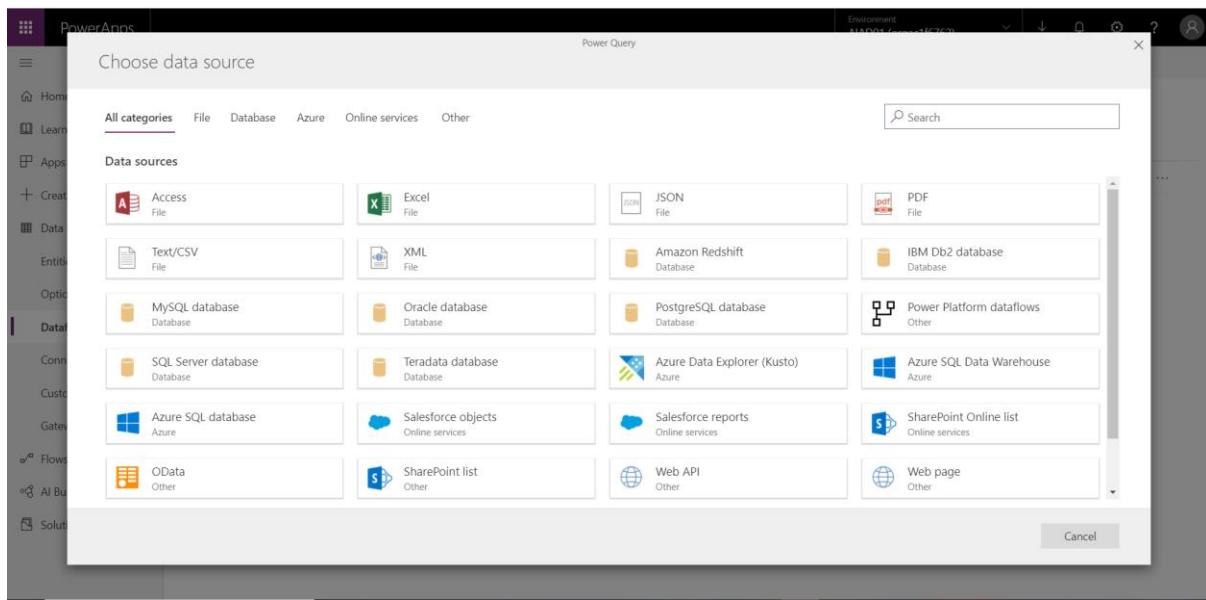
Select DataFlows (May say Data Integrations)

The screenshot shows the PowerApps Dataflows page. On the left, there's a navigation sidebar with options like Home, Learn, Apps, Create, Data (Entities, Option Sets), Dataflows (selected), Connections, Custom Connectors, Gateways, Flows, AI Builder (preview), and Solutions. The main area is titled "Dataflows" and shows a table with one row for "Project1". The columns are Name, Type, Last Refresh, and Next Refresh. Project1 is listed as Standard, N/A, and N/A respectively. There's also a "..." button.

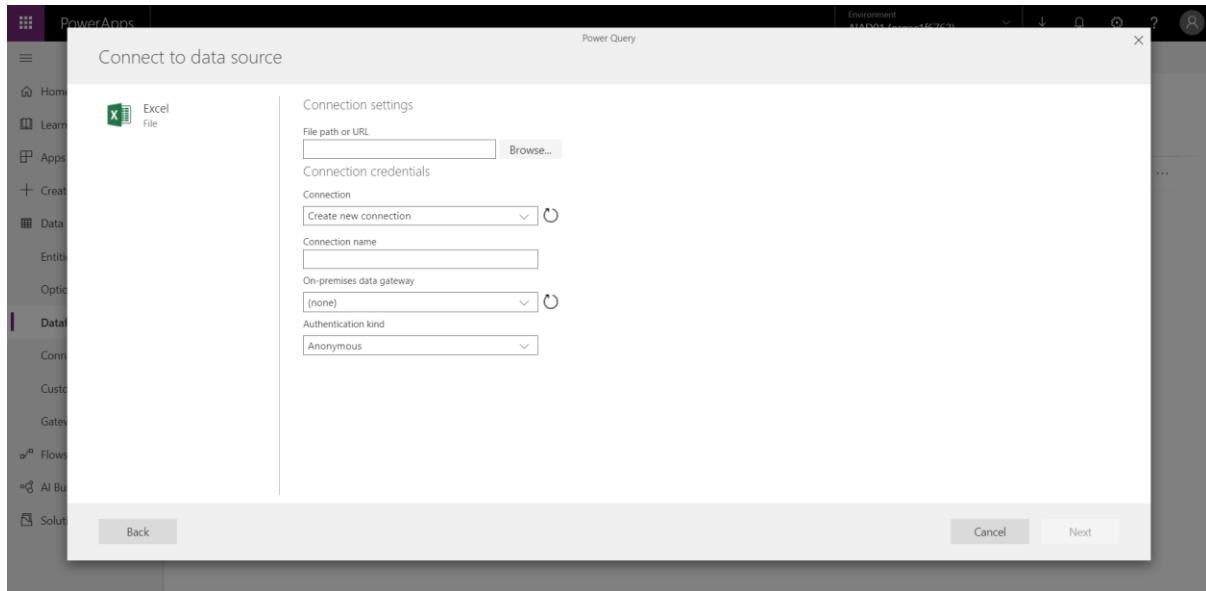
Create a New Dataflow and call it “Prospects”.

The screenshot shows the "New Dataflow" dialog box. It has a "Name" field set to "Prospects". Below the name, there's an "Options" section with a checkbox for "Analytical entities only (Preview)". At the bottom, there are "Create" and "Cancel" buttons. The background shows the PowerApps Dataflows page with the "Project1" dataflow visible.

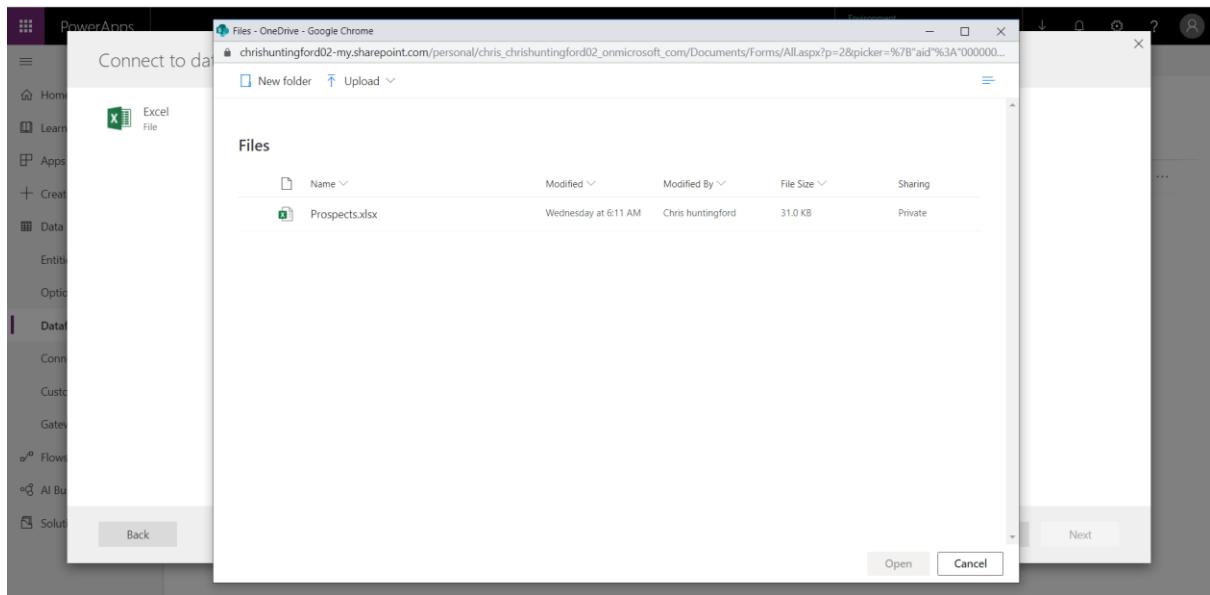
There are a load of options / Data Sources you could select from. Pick “Excel” in this scenario.



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 “Prospects” Excel file, Select the file and select Open.

> Documents > Software & Labs > Presentations > Power Platform in 30 Min

Name	Date modified	Type	Size
leads PowerBI	28/08/2019 10:21	Microsoft Power BI...	44 KB
LeadsData	09/08/2019 09:37	Microsoft Excel Co...	5 KB
LeadsDataExcel	09/08/2019 12:08	Microsoft Excel W...	16 KB
Prospects	31/08/2019 21:21	Microsoft Power BI...	42 KB
Prospects02	05/09/2019 14:29	Microsoft Excel W...	31 KB
Test01	04/09/2019 11:15	Microsoft Power BI...	58 KB
Prospects	05/09/2019 14:29	Microsoft Excel W...	31 KB

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

A screenshot of a file selection dialog box from OneDrive in Google Chrome. The title bar says "Files - OneDrive - Google Chrome". The address bar shows the URL: "chrishuntingford02-my.sharepoint.com/personal/chris_chrishuntingford02_onmicrosoft_com/Documents/Forms/All.aspx?p=2&picker=%7B"aid"%3A"000000...". Below the address bar are "New folder" and "Upload" buttons. The main area is titled "Files" and contains a table with columns: Name, Modified, Modified By, File Size, and Sharing. A single file, "Prospects.xlsx", is listed. At the bottom right are "Open" and "Cancel" buttons.

Name	Modified	Modified By	File Size	Sharing
Prospects.xlsx	A few seconds ago	Chris huntingford	30.7 KB	Private

Open Cancel

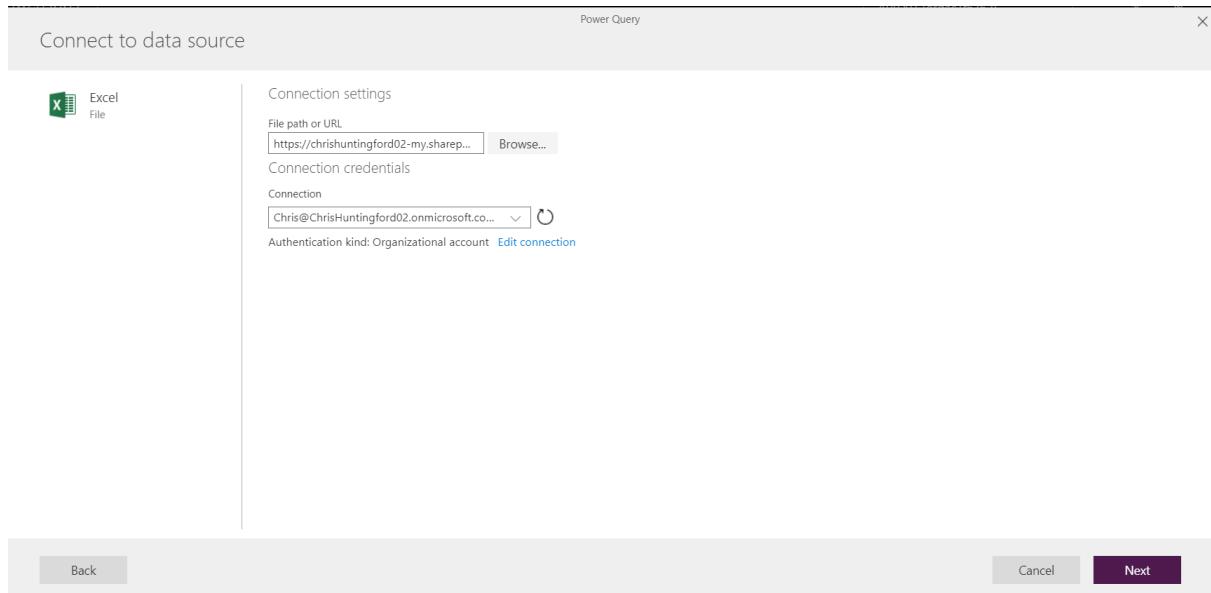
Select the file and click “open”. This will load the file path into the Power Query Data Source connection settings.

A screenshot of a file selection dialog box from OneDrive in Google Chrome, identical to the first one but with a checkmark next to the "Prospects.xlsx" file. The "Open" button is highlighted in blue, while "Cancel" is in white text on a grey background.

Name	Modified	Modified By	File Size	Sharing
Prospects.xlsx	A few seconds ago	Chris huntingford	30.7 KB	Private

Open Cancel

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.

Prospect ID	First Name	Last Name	Email	City	Post Code	Lat
PRO001	Adrienne	Root	Aroot@Therandomemail.com	Crieff	PH7 3PW	56.36
PRO002	Andrew	Peach	APeach@Therandomemail.com	Romford	RM6 5SA	51.581
PRO003	Carmen	Vex	CVex@Therandomemail.com	Tranent	EH34 5AB	55.91
PRO004	Dinesh	Nanjanji	Dnanjanji@Therandomemail...	Stockton-on-Tees	TS17 9PF	54.532
PRO005	Erlich	Bachman	EBachman@Therandomemail...	London	E3 3TP	51.872
PRO006	Fred	Parsons	TParsons@Therandomemail...	Carmarthen	SA32 7NI	53.912
PRO007	James	Peters	Jpeters@Therandomemail...	Otley	LS21 2JS	50.332
PRO008	Jason	Margera	Jmargera@Therandomemail...	Looe	PL13 2RU	50.517
PRO009	Jeff	Harding	Jharding@Therandomemail...	Gunnislake	PL18 9TB	50.197
PRO010	Jennifer	Berry	Jberry@Therandomemail...	Truro	TR3 7PD	51.522
PRO011	Kate	Wineford	KWineford@Therandomemail...	Liverpool	L12 0HL	51.872
PRO012	Laurie	Bream	LBream@Therandomemail...	York	YO1 6JL	53.912
PRO013	Lucy	Paterson	LPaterson@Therandomemail...	Newcastle upon Tyne	NE15	54.532
PRO014	Mark	Giffroye	MGiffroye@Therandomemail...	Widnes	WA8 4NP	51.872
PRO015	Mary	Wilkinson	MWilkinson@Therandomemail...	London	NW10 4UB	50.517
PRO016	Matt	Burk	MBurk@Therandomemail...	Chichester	PO19 5EF	51.872
PRO017	Michelle	Carter	MCarter@Therandomemail...	Ayr	KA9 9PQ	53.912
PRO018	Mohamed	Sendirani	MSendirani@Therandomemail...	Battle	TN33	54.532
PRO019	Monica	Crew	Mcrew@Therandomemail...	Isle of Barra	H99 5UA	50.332
PRO020	Richard	Hendricks	RHendricks@Therandomema...	Fetham	TW13 4IG	50.197

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

Prospect ID	First Name	Last Name	Email	City	Post Code	Lat
PRO001	Adrienne	Root	Aroot@Therandomemail.com	Crieff	PH7 3PW	56.36
PRO002	Andrew	Peach	APeach@Therandomemail.com	Romford	RM6 5SA	51.581
PRO003	Carmen	Vex	CVex@Therandomemail.com	Tranent	EH34 5AB	55.91
PRO004	Dinesh	Nanjanji	Dnanjanji@Therandomemail...	Stockton-on-Tees	TS17 9PF	54.532
PRO005	Erlich	Bachman	EBachman@Therandomemail...	London	E3 3TP	51.872
PRO006	Fred	Parsons	TParsons@Therandomemail...	Carmarthen	SA32 7NI	53.912
PRO007	James	Peters	Jpeters@Therandomemail...	Otley	LS21 2JS	50.332
PRO008	Jason	Margera	Jmargera@Therandomemail...	Looe	PL13 2RU	50.517
PRO009	Jeff	Harding	Jharding@Therandomemail...	Gunnislake	PL18 9TB	50.197
PRO010	Jennifer	Berry	Jberry@Therandomemail.com	Truro	TR3 7PD	50.197
PRO011	Kate	Wineford	KWineford@Therandomemail...	Liverpool	L12 0HL	53.912

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

Power Query

Get data Refresh Options Manage columns Transform table Reduce rows Add column Go to column Combine tables

Prospects

Table.TransformColumnTypes("Promoted headers", {"Prospect ID", type text}, {"First Name", type text}, {"Last Name", type text}, {"Email", type text}, {"City", type text}, {"Post Code", type text}, {"1.2 lat", type text}, {"1.2 lon", type text})

Prospect ID	First Name	Last Name	Email	City	Post Code	1.2 lat	1.2 lon
PRO001	Adrienne	Root	ARoot@Therandomemail.com	Crief	PH7 3PW	56.36	
PRO002	Andrew	Peach	APeach@Therandomemail.com	Romford	RM6 5SA	51.581	
PRO003	Carmen	Vex	CVex@Therandomemail.com	Tranent	EH34 5AB	55.91	
PRO004	Dinesh	Nanjanji	Dnanjanji@Therandomemail.com	Stockton-on-Tees	TS17 9PF	54.532	
PRO005	Erlich	Bachman	EBachman@Therandomemail.com	London	E3 3TP	51.522	
PRO006	Fred	Parsons	Fparsons@Therandomemail.com	Carmarthen	SA32 7NU	51.872	

Applied steps

- Name Prospects
- Source
- Navigation
- Promoted headers
- Changed column type

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

Power Apps

Edit queries

Get data Refresh Options Manage columns Transform column Transform table Reduce rows Add column Go to column Combine tables

Prospects

Table.TransformColumnTypes("Promoted headers", {"Prospect ID", type text}, {"First Name", type text}, {"Last Name", type text}, {"Email", type text}, {"Post Code", type text}, {"1.2 lat", type text}, {"1.2 lon", type text}, {"Status", type text}, {"Satisfaction Rating", type text}, {"Rating", type text}, {"Product Interest", type text}, {"Date of interest", type text})

Prospect ID	First Name	Last Name	Email	Post Code	1.2 lat	1.2 lon	Status	Satisfaction Rating	Rating	Product Interest	Date of interest
1	PH7 3PW	1.2 Decimal number	d	1	2	3	4	5	6	7	8
2	rd	RM6 5SA	\$	Cold	Dynamics 365 CE	9/1/2018					
3	t	EH34 5AB	Whole number	2	Warm	SharePoint	3/1/2018				
4	on-on-Tees	TS17 9PF	%	3	Warm	MS Teams	4/1/2018				
5	h	E3 3TP	Percentage	4	Cold	Dynamics 365 Bus Central	5/1/2018				
6	lthen	SA32 7NU	Date/Time	5	Hot	Dynamics 365 FinOps	9/1/2019				
7	LS21 2J5	PL13 2RU	Date	6	Hot	Power Platform	7/1/2018				
8	PL13 2RU	PL13 2RU	Time	7	Hot	Power Platform	8/1/2018				
9	PL13 2RU	PL13 2RU	Time	8	Hot	Power Platform	8/1/2018				

Applied steps

- Name Prospects
- Source
- Navigation
- Promoted headers
- Changed column type

Select “Replace Current” when changing the data types.

Power Apps

Edit queries

Get data Refresh Options Manage columns Transform column Transform table Reduce rows Add column Go to column Combine tables

Prospects

Table.TransformColumnTypes("Promoted headers", {"Prospect ID", type text}, {"First Name", type text}, {"Last Name", type text}, {"Email", type text}, {"Post Code", type text}, {"1.2 lat", type text}, {"1.2 lon", type text}, {"Status", type text}, {"Satisfaction Rating", type text}, {"Rating", type text}, {"Product Interest", type text}, {"Date of interest", type text})

Prospect ID	First Name	Last Name	Email	Post Code	1.2 lat	1.2 lon	Status	Satisfaction Rating	Rating	Product Interest	Date of interest
1	PH7 3PW	1.2 Decimal number	d	1	2	3	4	5	6	7	8
2	rd	RM6 5SA	\$	Cold	Dynamics 365 CE	9/1/2018					
3	t	EH34 5AB	Whole number	2	Warm	SharePoint	3/1/2018				
4	on-on-Tees	TS17 9PF	%	3	Warm	MS Teams	4/1/2018				
5	h	E3 3TP	Percentage	4	Cold	Dynamics 365 Bus Central	5/1/2018				
6	lthen	SA32 7NU	Date/Time	5	Hot	Dynamics 365 FinOps	9/1/2019				
7	LS21 2J5	PL13 2RU	Date	6	Hot	Power Platform	7/1/2018				
8	PL13 2RU	PL13 2RU	Time	7	Hot	Power Platform	8/1/2018				
9	PL13 2RU	PL13 2RU	Time	8	Hot	Power Platform	8/1/2018				

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

Applied steps

- Name Prospects
- Source
- Navigation
- Promoted headers
- Changed column type

Do the same for longitude.

Power Apps

Edit queries

Get data Refresh Options Manage columns Transform column Transform table Reduce rows Add column Go to column Combine tables

Prospects

Table.TransformColumnTypes("Promoted headers", {"Prospect ID", type text}, {"First Name", type text}, {"Last Name", type text}, {"Email", type text}, {"Post Code", type text}, {"1.2 lat", type text}, {"1.2 lon", type text}, {"Status", type text}, {"Satisfaction Rating", type text}, {"Rating", type text}, {"Product Interest", type text}, {"Date of interest", type text})

Prospect ID	First Name	Last Name	Email	Post Code	1.2 lat	1.2 lon	Status	Satisfaction Rating	Rating	Product Interest	Date of interest
1	Crief	PH7 3PW	56.36012...	1.2 Decimal number	1	2	3	4	5	6	7
2	Romford	RM6 5SA	51.58076...	\$	Currency	2	3	4	5	6	7
3	Tranent	EH34 5AB	55.9103...	Whole number	3	4	5	6	7	8	9
4	Stockton-on-Tees	TS17 9PF	54.5319...	%	Percentage	4	5	6	7	8	9
5	London	E3 3TP	51.5221...	Date/Time	Date	5	6	7	8	9	10
6	Carmarthen	SA32 7NU	51.8721...	Date	6	7	8	9	10	11	12
7	Otley	LS21 2J5	53.9123...	Time	7	8	9	10	11	12	13
8	Looe	PL13 2RU	50.33164...	Date/Time/Zone	8	9	10	11	12	13	14
9	Gunnislake	PL18 9TB	50.5170...	Duration	9	10	11	12	13	14	15
10	Truro	TR3 7PD	50.19721...	Text	10	11	12	13	14	15	16
11	Liverpool	L12 0HL	53.4448...	True/false	11	12	13	14	15	16	17
12	York	YO1 6UL	53.95804...	Binary	12	13	14	15	16	17	18
13	Newcastle upon Tyne	NE13	54.97632...		13	14	15	16	17	18	19
14	Widnes	WA8 4NP	53.378259...		14	15	16	17	18	19	20

Applied steps

- Name Prospects
- Source
- Navigation
- Promoted headers
- Changed column type

Select “Replace Current” when changing the data types.

The screenshot shows the Power Query 'Edit queries' interface. A 'Change column type' dialog box is open over a table of data. The dialog contains the following text: '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?'. Below the text are three buttons: 'Replace current', 'Add new step', and 'Cancel'. The 'Replace current' button is highlighted.

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”.

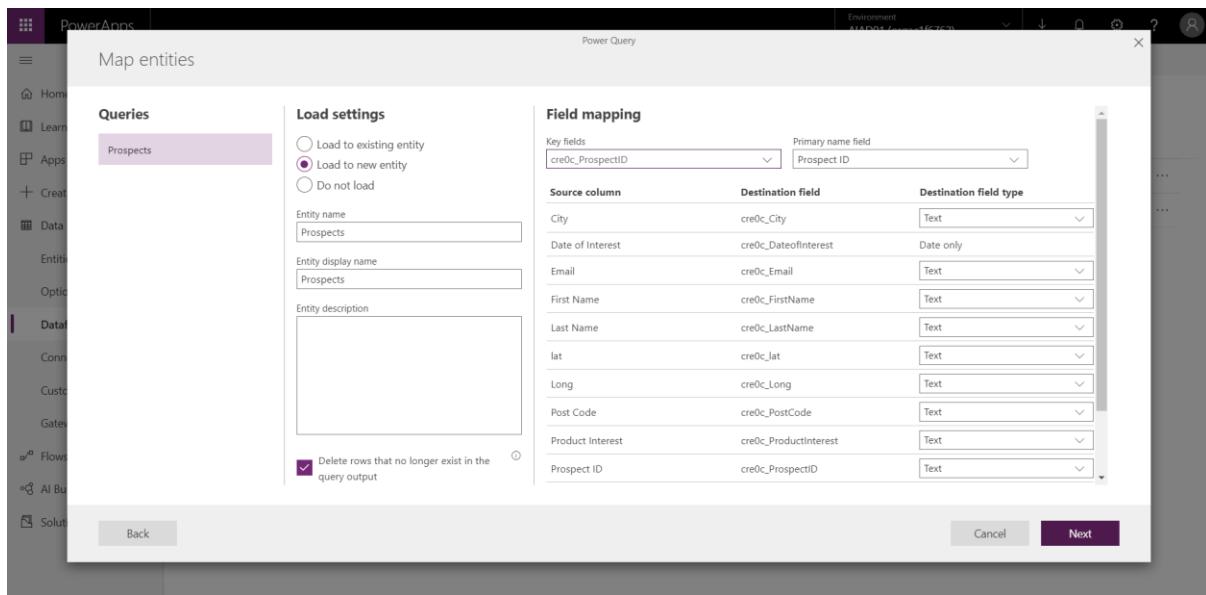
Select “Delete rows that no longer exist in the query output”.

The screenshot shows the Power Query 'Map entities' interface. In the 'Load settings' section, the radio button for 'Load to new entity' is selected. In the 'Field mapping' section, there is a table with columns 'Source column' and 'Destination field'. The 'Source column' column lists fields like City, Date of Interest, Email, First Name, Last Name, lat, Long, Post Code, Product Interest, and Prospect ID. The 'Destination field' column lists corresponding fields with suffixes: cre0c_City, cre0c_Dateofinterest, cre0c_Email, cre0c_FirstName, cre0c_LastName, cre0c_lat, cre0c_Long, cre0c_PostCode, cre0c_ProductInterest, and cre0c_ProspectID. A checkbox at the bottom left of the mapping area is checked, labeled 'Delete rows that no longer exist in the query output'.

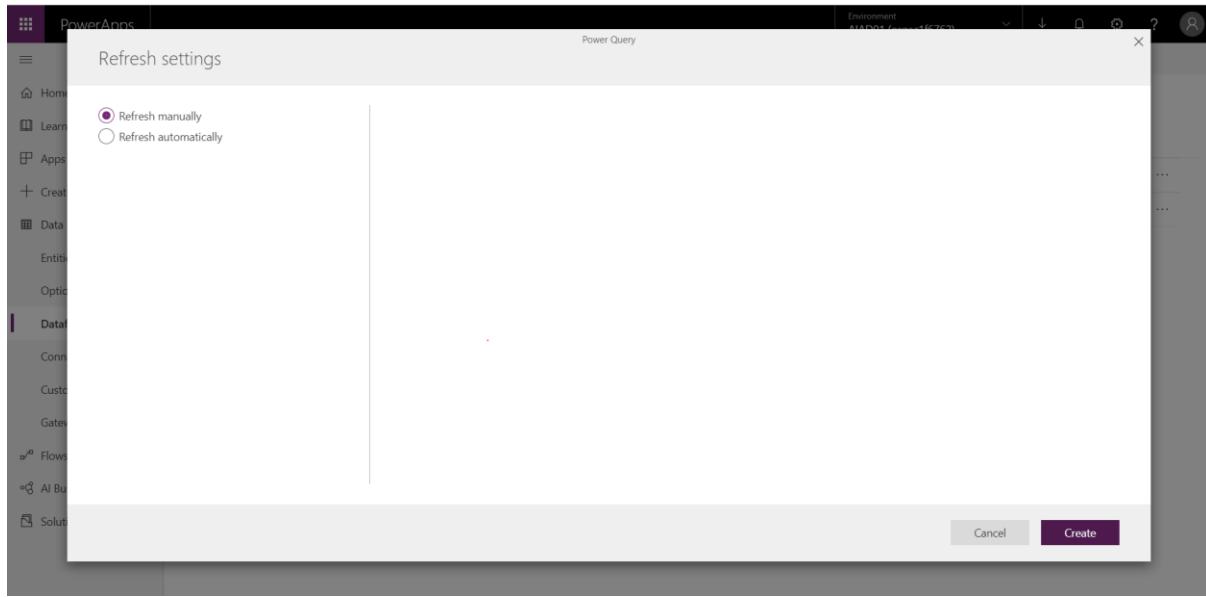
Set all the field types, that can be changed, to “Text”.

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

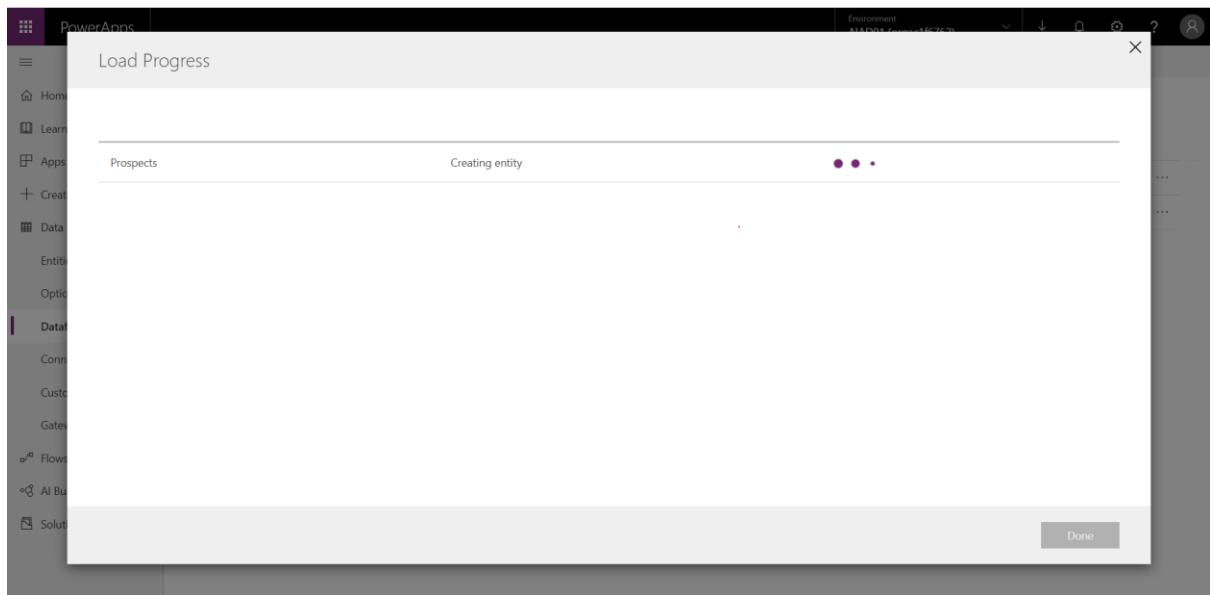
Hit “next” to continue.



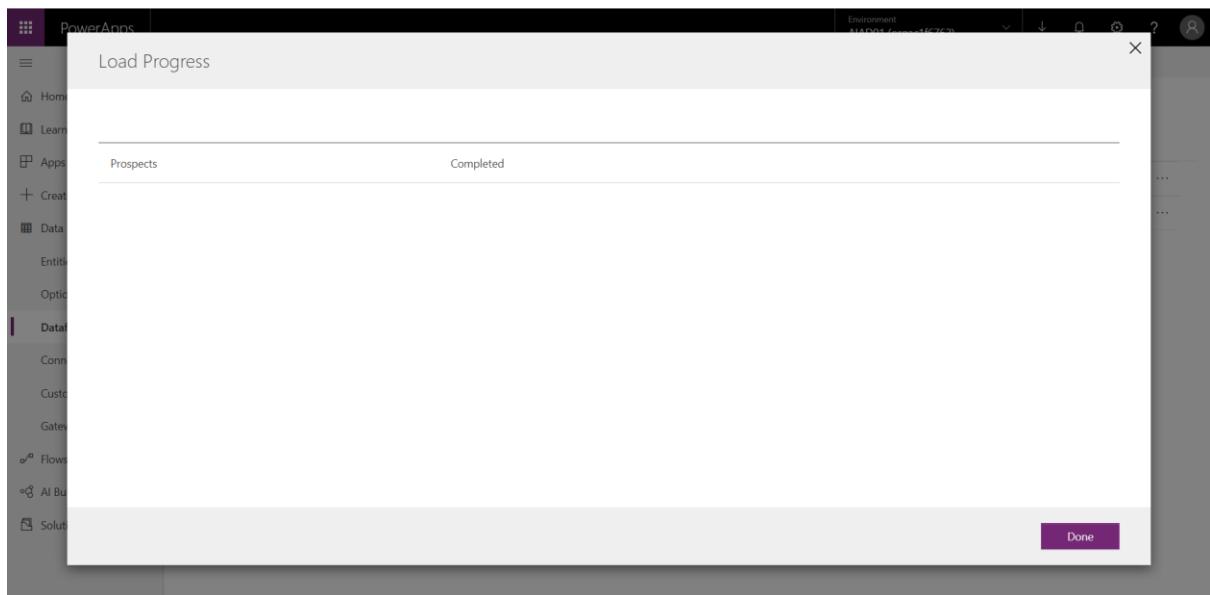
Select “Refresh manually” and then click “Create”.



You will be able to see the indicator of the entity being created in the background, in the form of 3 resizing dots.



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.

The screenshot shows the PowerApps Dataflows page. The left sidebar has a 'Dataflows' section selected. The main area displays a table titled 'Dataflows' with three rows:

Name	Type	Last Refresh	Next Refresh	...
Project1	Standard	N/A	N/A	...
Prospects	Standard	N/A	N/A	...
prospects	Standard	N/A	N/A	...

This concludes Lab number 1 and the focus around the bringing in data from a data source into the Common Data Service.

Lab 2: Configuring Forms, Views & Charts in the CDS*

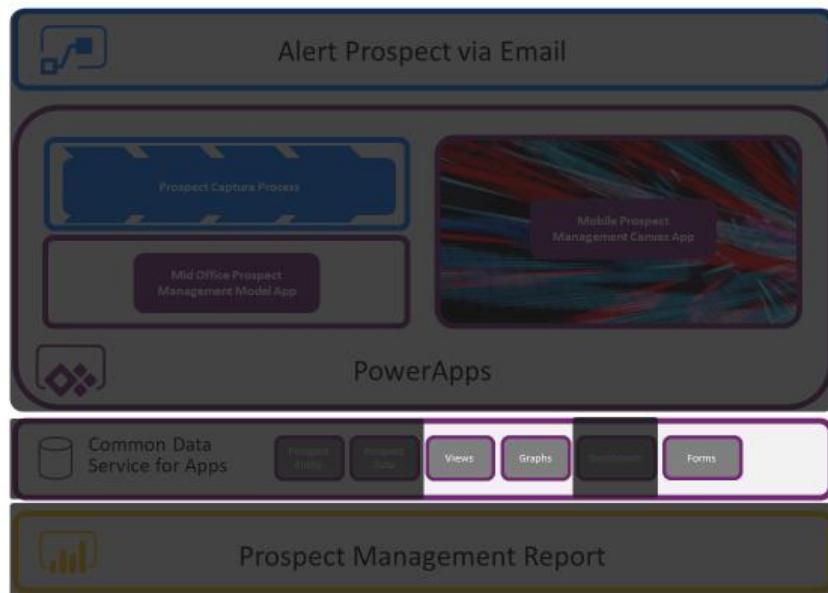
We will start off by bringing in the Excel data structure into the Common Data service (CDS) by leveraging Data Flows within the CDS and Power Query.

Please Note:

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

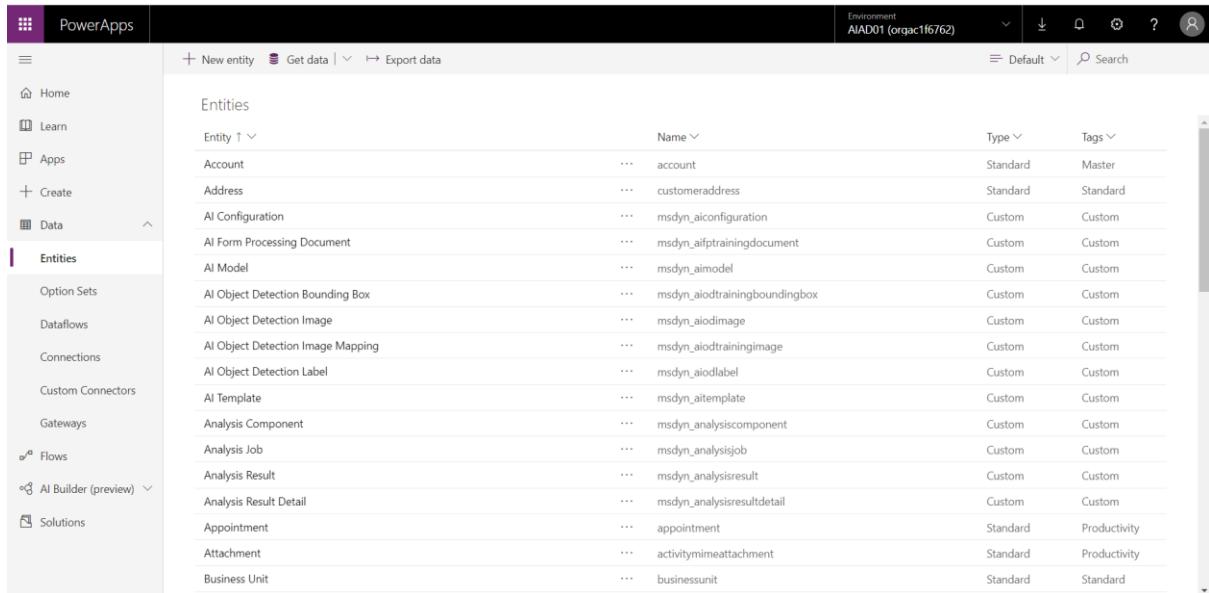
Solution Components

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



Let's Begin

Navigate to 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.

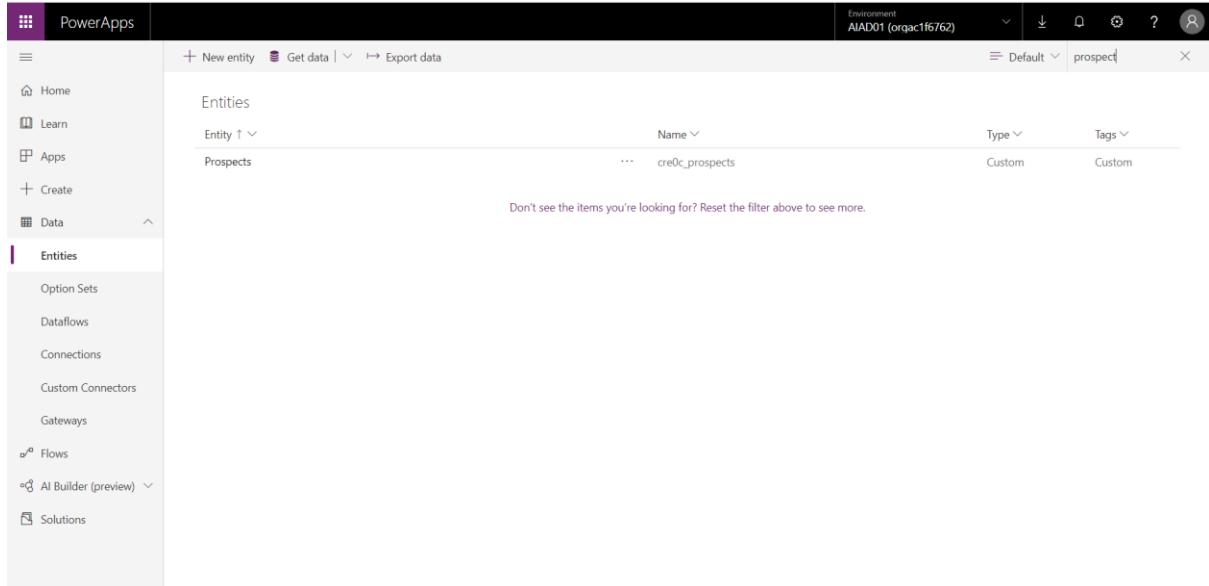


The screenshot shows the PowerApps Data Entities page. The left sidebar has a 'Data' section expanded, showing 'Entities' as the selected option. The main area displays a table of entities with columns for Name, Type, and Tags. The entities listed include Account, Address, AI Configuration, AI Form Processing Document, AI Model, AI Object Detection Bounding Box, AI Object Detection Image, AI Object Detection Image Mapping, AI Object Detection Label, AI Template, Analysis Component, Analysis Job, Analysis Result, Analysis Result Detail, Appointment, Attachment, and Business Unit. The 'Tags' column for most entities shows 'Standard' or 'Custom'.

Name	Type	Tags
Account	Standard	Master
Address	Standard	Standard
AI Configuration	Custom	Custom
AI Form Processing Document	Custom	Custom
AI Model	Custom	Custom
AI Object Detection Bounding Box	Custom	Custom
AI Object Detection Image	Custom	Custom
AI Object Detection Image Mapping	Custom	Custom
AI Object Detection Label	Custom	Custom
AI Template	Custom	Custom
Analysis Component	Custom	Custom
Analysis Job	Custom	Custom
Analysis Result	Custom	Custom
Analysis Result Detail	Custom	Custom
Appointment	Standard	Productivity
Attachment	Standard	Productivity
Business Unit	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



The screenshot shows the PowerApps Data Entities page with a search filter applied. The search term 'prospect' is entered in the search bar at the top right. The results table shows one entity named 'Prospects' with a name of 'cre0c_prospects'. The 'Type' column indicates it is a 'Custom' entity. A message below the table says 'Don't see the items you're looking for? Reset the filter above to see more.'

Name	Type	Tags
cre0c_prospects	Custom	Custom

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

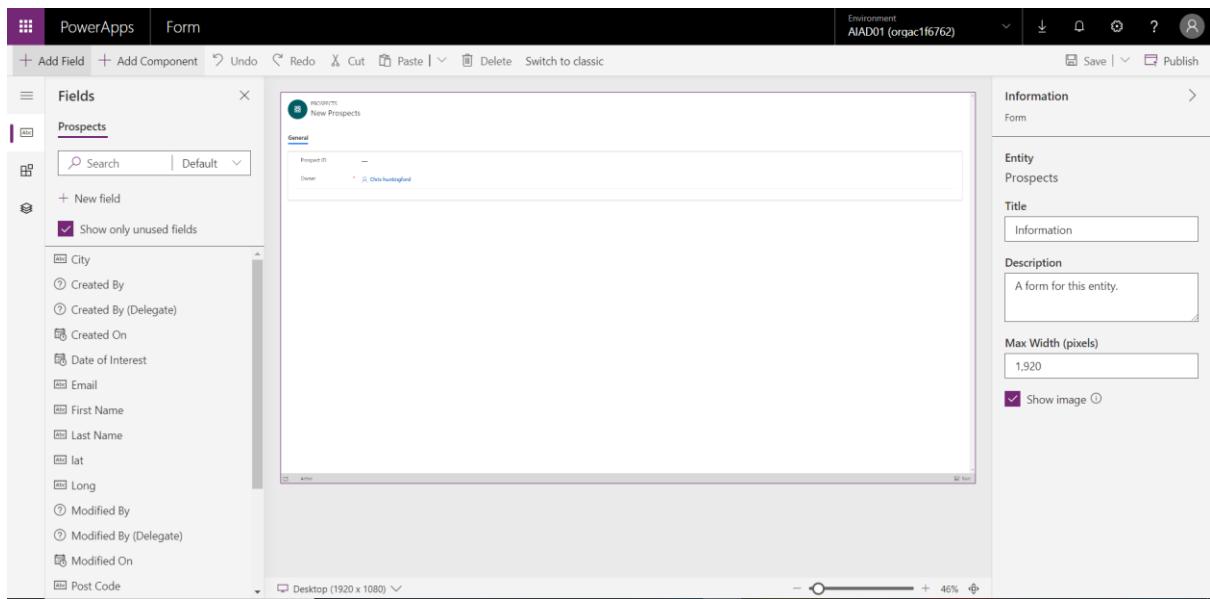
The screenshot shows the PowerApps Studio interface. The left sidebar has a 'Data' section expanded, showing 'Entities'. The main area is titled 'Entities > Prospects'. The 'Fields' tab is selected. A table lists fields such as City, Date of Interest, Email, First Name, Last Name, Lat, Long, Post Code, Product Interest, Prospect ID, Rating, Satisfaction Rating, and Status. Each field has a display name, a name (e.g., cre0c_city, cre0c_dateofinterest), a data type (e.g., Text, Date Only, Whole Number), a type (e.g., Custom, Date Only, Whole Number), and a required status (e.g., checked). A note 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.

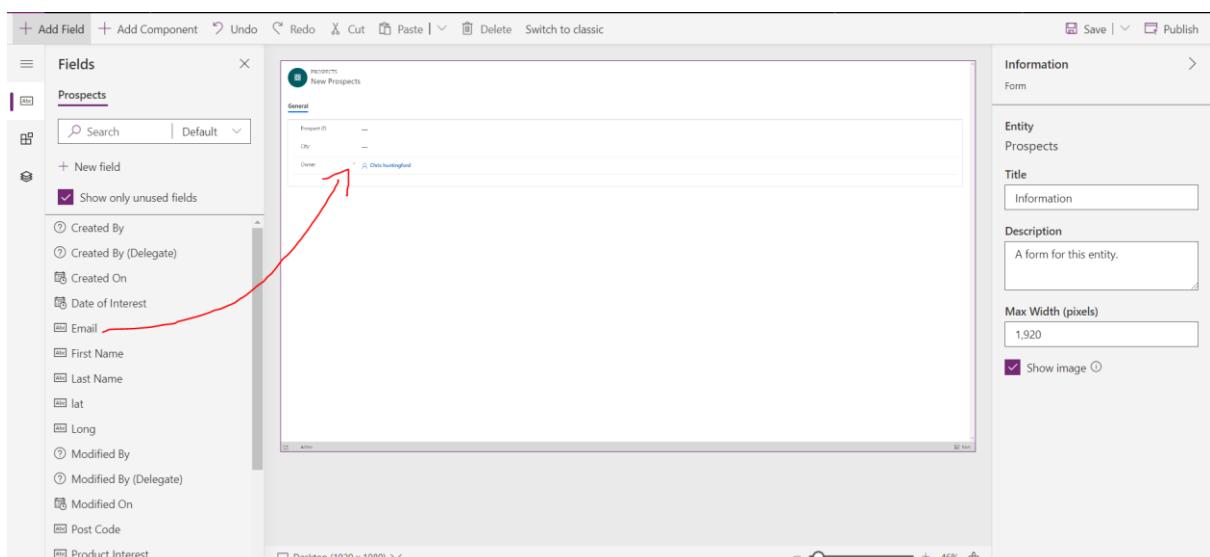
The screenshot shows the PowerApps Studio interface. The left sidebar has a 'Data' section expanded, showing 'Entities'. The main area is titled 'Entities > Prospects'. The 'Forms' tab is selected. A table lists forms: 'Information' (Quick View Form, Custom), 'Information' (Card, Custom), and 'Information' (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.

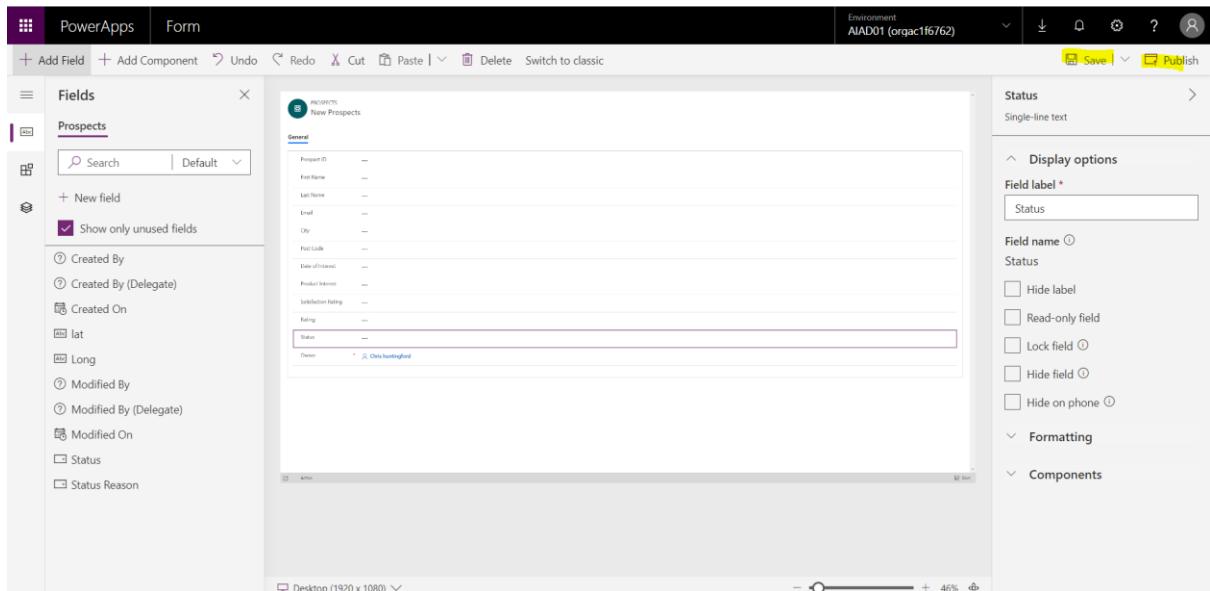


Drag and drop the following fields onto the form:

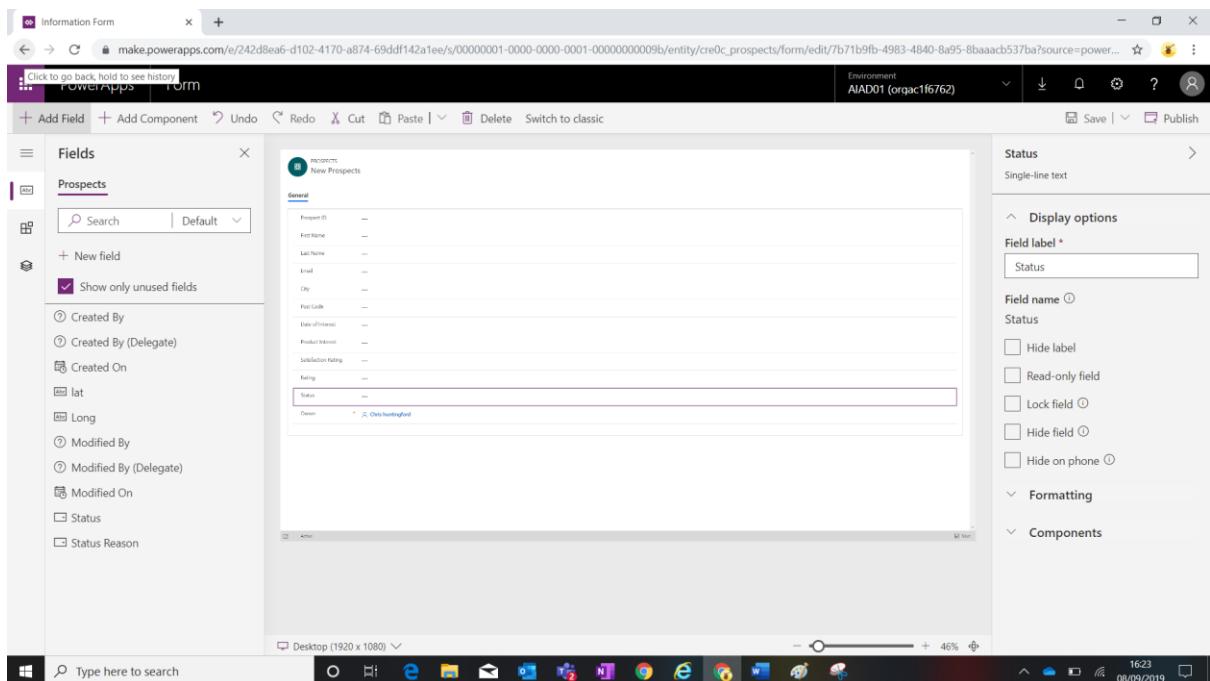
1. First Name
2. Last Name
3. Email
4. City
5. Post Code
6. Date of Interest
7. Product Interest
8. Satisfaction Rating
9. Rating
10. Status (there are 2 status fields, make sure you select the TEXT version of the field)



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 PowerApps Studio interface. On the left, there's a navigation sidebar with options like Home, Learn, Apps, Create, Data, Entities, Option Sets, Dataflows, Connections, Custom Connectors, Gateways, Flows, AI Builder (preview), and Solutions. The main area is titled 'Entities > Prospects' and shows a list of views. The 'Views' tab is selected. The list includes:

Name	View type	Type
Active Prospects	Public View	Standard
Inactive Prospects	Public View	Standard
Prospects Advanced Find View	Advanced Find View	Standard
Prospects Associated View	Associated View	Standard
Prospects Lookup View	Lookup View	Standard
Quick Find Active Prospects	Quick Find View	Standard

Open the “Active Prospects” view from the list.

The screenshot shows the PowerApps Studio Fields view for the Prospects entity. On the left, there's a sidebar with 'Fields' and a list of fields: Prospect ID, Created On, City, Date of Interest, Email, First Name, Last Name, lat, Long, Post Code, Product Interest, Rating, Satisfaction Rating, and Status. The 'Active Prospects' view is selected on the right. The view configuration includes:

- Name:** Active Prospects
- Description:** (empty)
- Sort by ...:** Prospect ID
- Filter by ...:** Status is 'Active'

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

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

The screenshot shows the PowerApps Studio interface with the 'Active Prospects' view open. On the left, the 'Fields' pane is visible, listing various prospect fields like First Name, Last Name, and City. The main area displays a table of prospects with columns for Prospect ID, First Name, Last Name, City, Satisfaction Rating, Product Interest, Status, and Created On. A red arrow points to the 'Prospect ID' column header. The right side of the screen shows the view's settings, including a 'Name' field set to 'Active Prospects' and a 'Status is 'Active'' filter.

Prospect ID	First Name	Last Name	City	Satisfaction R...	Product Inter...	Status	Created On
PRO001	Adrienne	Root	Crief	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	Nanjanji	Stockton-on-Tees	5	MS Teams	Contacted	9/8/2019 2:43 PM
PRO005	Erlich	Bachman	London	5	Dynamics 365 Bu...	Under Review	9/8/2019 2:43 PM
PRO006	Fred	Parsons	Carmarthen	9	Dynamics 365 Fl...	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
PRO009	Jeff	Harding	Gunnislake	9	Dynamics 365 CE	Contacted	9/8/2019 2:43 PM
PRO010	Jennifer	Berry	Truro	10	SharePoint	Under Review	9/8/2019 2:43 PM
PRO011	Kate	Wineford	Liverpool	9	MS Teams	Contacted	9/8/2019 2:43 PM
PRO012	Laurie	Bream	York	2	Dynamics 365 Bu...	Pending	9/8/2019 2:43 PM
PRO013	Lucy	Paterson	Newcastle upon ...	3	Dynamics 365 Fl...	Final Stages	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.

This screenshot shows the same 'Active Prospects' view as above, but with the 'Prospect ID' column resized significantly smaller. The other columns remain at their original widths. The right side of the screen shows the view's settings, including a 'Name' field set to 'Active Prospects' and a 'Status is 'Active'' filter.

Prospect ID	First Name	Last Name	City	Satisfaction R...	Product Inter...	Status	Created On
PRO001	Adrienne	Root	Crief	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	Nanjanji	Stockton-on-Tees	5	MS Teams	Contacted	9/8/2019 2:43 PM
PRO005	Erlich	Bachman	London	5	Dynamics 365 Bu...	Under Review	9/8/2019 2:43 PM
PRO006	Fred	Parsons	Carmarthen	9	Dynamics 365 Fl...	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
PRO009	Jeff	Harding	Gunnislake	9	Dynamics 365 CE	Contacted	9/8/2019 2:43 PM
PRO010	Jennifer	Berry	Truro	10	SharePoint	Under Review	9/8/2019 2:43 PM
PRO011	Kate	Wineford	Liverpool	9	MS Teams	Contacted	9/8/2019 2:43 PM
PRO012	Laurie	Bream	York	2	Dynamics 365 Bu...	Pending	9/8/2019 2:43 PM
PRO013	Lucy	Paterson	Newcastle upon ...	3	Dynamics 365 Fl...	Final Stages	9/8/2019 2:43 PM

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

The screenshot shows the PowerApps Studio interface with the 'Active Prospects' view selected. The left sidebar lists fields for Prospects and Related entities. The main grid displays 13 rows of prospect data. The right sidebar contains settings for the view, including sorting by Prospect ID and filtering by Active 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

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

The screenshot shows a Microsoft Edge browser window displaying the 'Active Prospects' view. The interface is identical to the PowerApps Studio screenshot above, displaying the list of prospects and view settings.

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.

The screenshot shows the PowerApps Studio interface. The left sidebar is titled "PowerApps" and includes sections for Home, Learn, Apps, Create, Data (which is expanded to show Entity Sets, Dataflows, Connections, Custom Connectors, Gateways, Flows, AI Builder (preview), and Solutions), and AI Builder (preview). The main content area is titled "Entities > Prospects" and shows the "Views" tab selected. A table lists various views for the Prospects entity, including Active Prospects, Inactive Prospects, Prospects Advanced Find View, Prospects Associated View, Prospects Lookup View, and Quick Find Active Prospects. Each view is categorized by its type (e.g., Public View, Advanced Find View, Associated View, Lookup View, Quick Find View) and has a "Default" status indicator.

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 Studio interface with the "Charts" tab selected in the top navigation bar. The main content area displays a message stating "We didn't find anything to show here" with a small funnel icon. Below the message, it says "Remove the filter to see other items, or try using an alternate search term" and a "Remove filter" button.

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

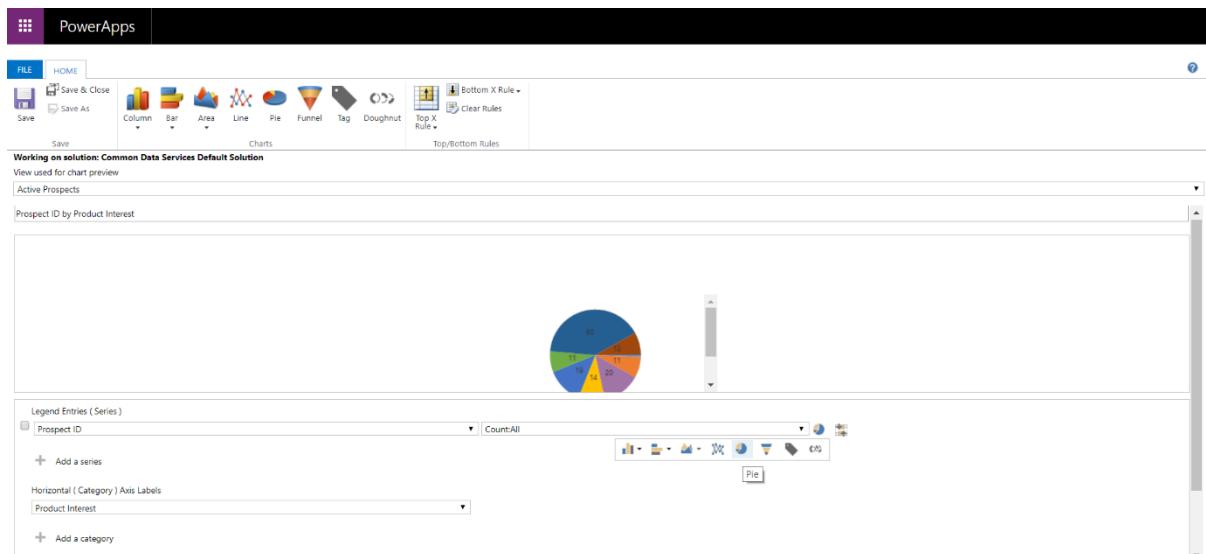
The screenshot shows the PowerApps interface. On the left, there's a navigation bar with options like Home, Learn, Apps, Create, Data, Entities, and Option Sets. The 'Entities' option is currently selected. The main area displays 'Entities > Prospects'. Below this, there are tabs for Fields, Relationships, Business rules, Views, Forms, Dashboards, and Charts. The 'Charts' tab is selected. A 'Model-driven' button is visible. The search bar shows 'Name ↑' and 'Type'. There's also a 'New' button and a 'Back' arrow icon.

The Chart editor will open in a separate page.

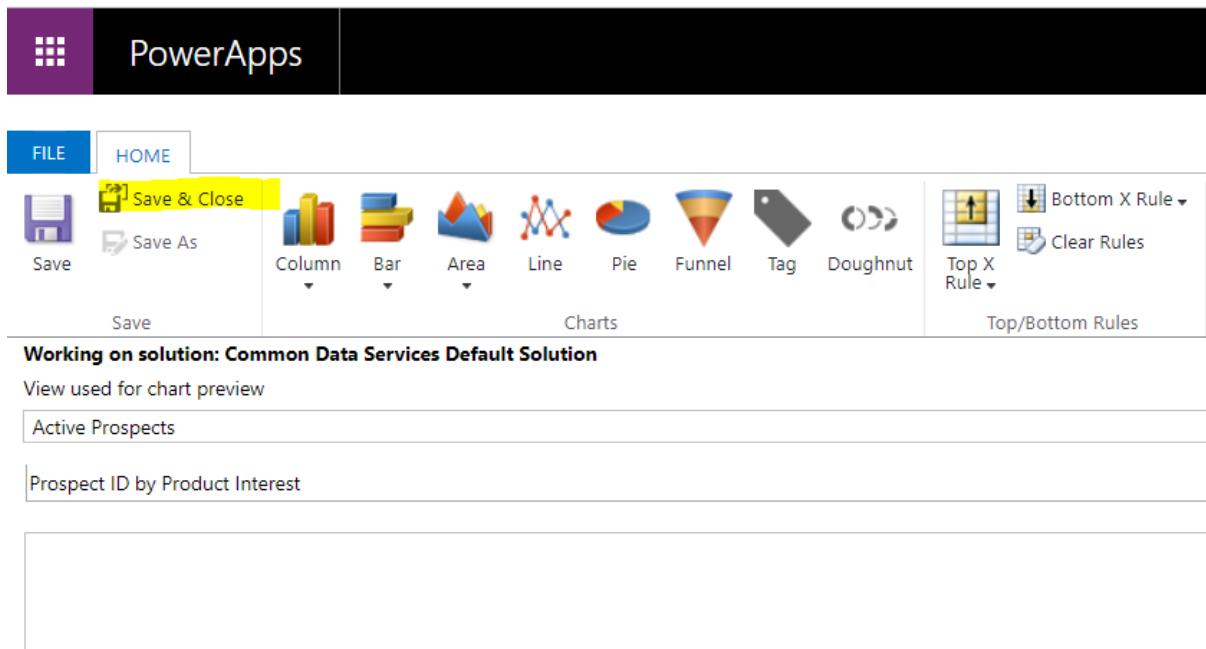
The screenshot shows the 'Chart: New' editor. The top menu has 'File', 'Home', 'Save & Close', 'Save As', and various chart type icons (Column, Bar, Area, Line, Pie, Funnel, Tag, Doughnut). The 'Home' tab is selected. The main area shows a bar chart with four bars labeled 'Category' on the x-axis and 'Series' on the y-axis. Below the chart, there are sections for 'Legend Entries (Series)', 'Horizontal (Category) Axis Labels', and a note: 'To preview your chart, select a value for each series and category.' The status bar at the bottom says 'Working on solution: Common Data Services Default Solution'.

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”.



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”.

The screenshot shows the Microsoft PowerApps Studio interface. On the left, there's a navigation sidebar with options like Home, Learn, Apps, Create, Data, Entities, Option Sets, Dataflows, Connections, Custom Connectors, Gateways, Flows, AI Builder (preview), and Solutions. The main area is titled 'Entities > Prospects' and shows tabs for Fields, Relationships, Business rules, Views, Forms, Dashboards, Charts (which is underlined in purple), Keys, and Data. Below these tabs, there's a search bar with 'Name ↑' and 'Type ↓'. A modal dialog box is centered over the page, containing the text 'Currently creating a new chart' and 'When you're done creating the chart, click Done below to return to the entity. This will refresh the page and fetch your changes.' At the bottom of the modal are two buttons: 'Done' (in a purple box) and 'Remove filter' (in a grey box). To the right of the modal, there's a link 'View here' and a note 'in alternate search term'.

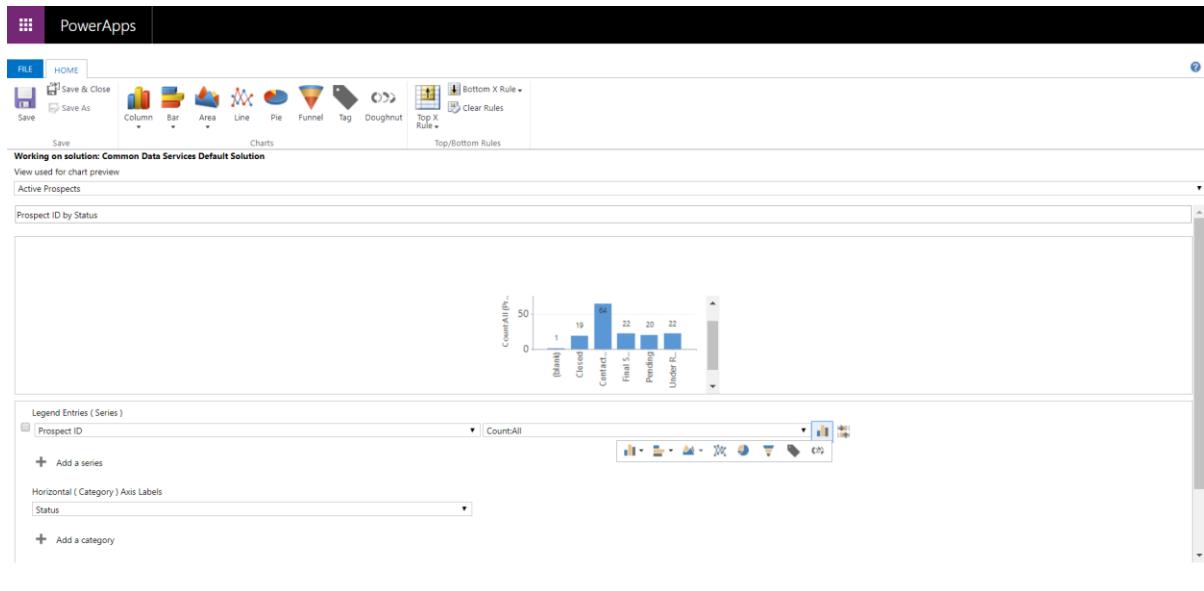
You can now see your chart in the chart list.

The screenshot shows the Microsoft PowerApps Studio interface, similar to the previous one but with a different chart listed. The navigation sidebar is identical. The main area shows the 'Charts' tab selected for the 'Prospects' entity. A chart titled 'Prospect ID by Product Interest' is listed in the chart list. The list has a header row with columns for 'Name ↑' and 'Type ↓'. Below the header, there's a single item: 'Prospect ID by Product Interest' followed by a 'Custom' label. At the bottom of the chart list, there's a message: '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:

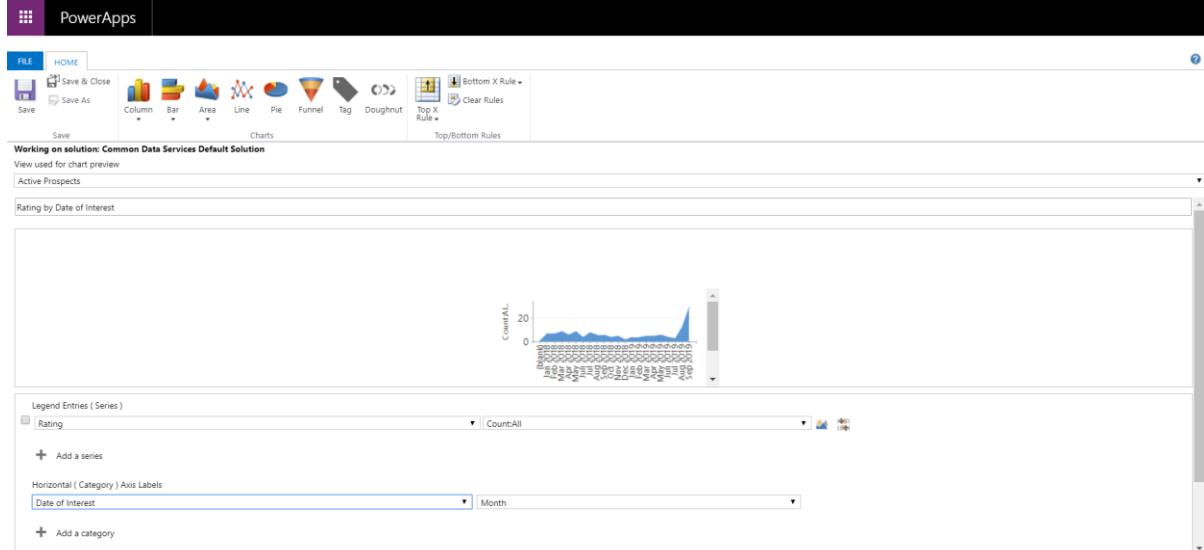
In this chart we are going to display the number of prospects currently within a certain status type. Select the following from the various option sets:

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:

The screenshot shows the PowerApps Entities > Prospects page. The left sidebar has sections for Home, Learn, Apps, Create, Data, Entities, Option Sets, and Dataflows. The main area shows a chart titled "Prospects" with three data series: "Prospect ID by Product Interest" (Custom), "Prospect ID by Status" (Custom), and "Rating by Date of Interest" (Custom). A message at the bottom says "Don't see the items you're looking for? Reset the filter above to see".

Lab 3: Configuring your Business Process Flow and Model Driven App experience

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:

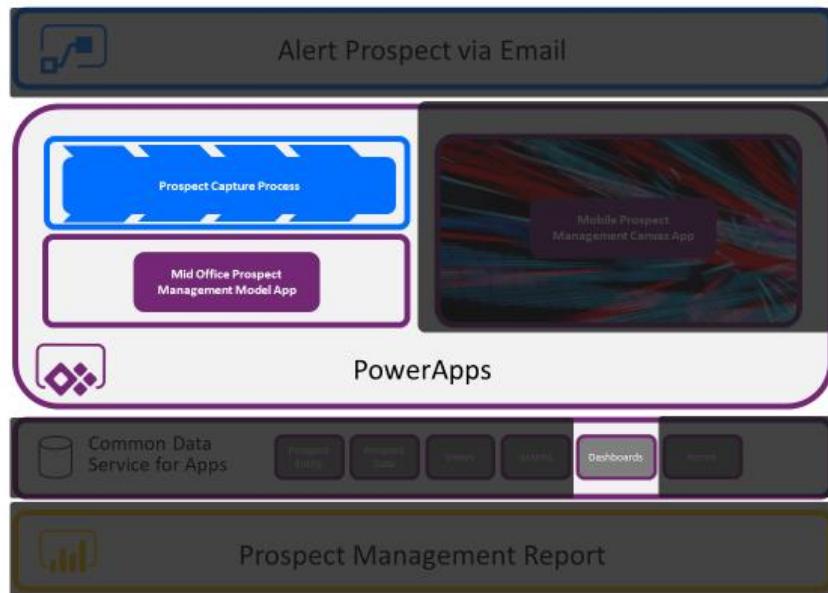
Many of the elements in this lab are is reliant on the completion of Lab number 2. If you do not complete Lab number 2, the forms, graphs and views will not work in the same way. This is especially relevant in the Dashboards section.

Solution Components

PowerApps (Model Driven Applications)

Microsoft Flow : Business Process Flow

PowerApps (Classic Dashboards)

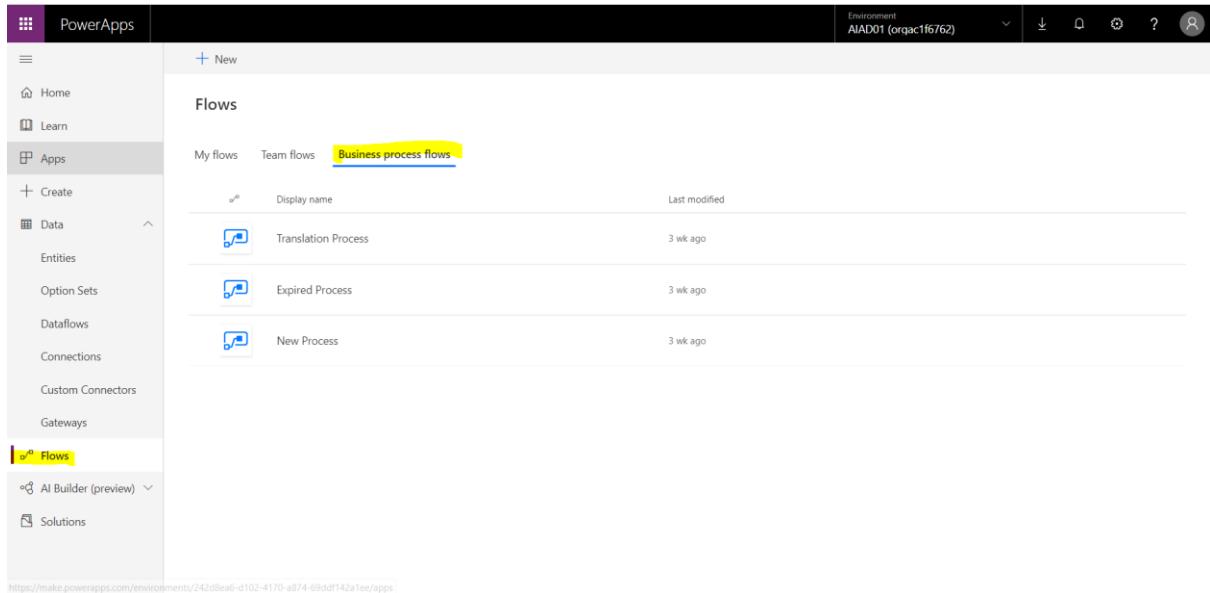


Let's Begin

Business Process Flow

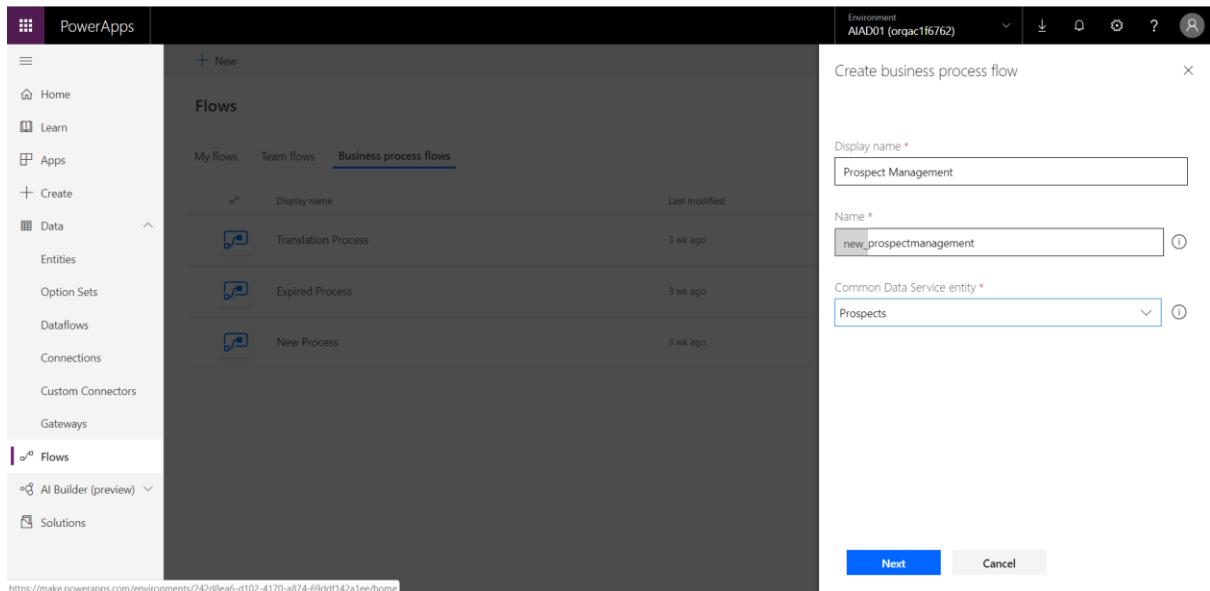
We will be creating a basic step by step process for the mid office user to follow when interacting with the prospect data captured by the sales user at the event.

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.



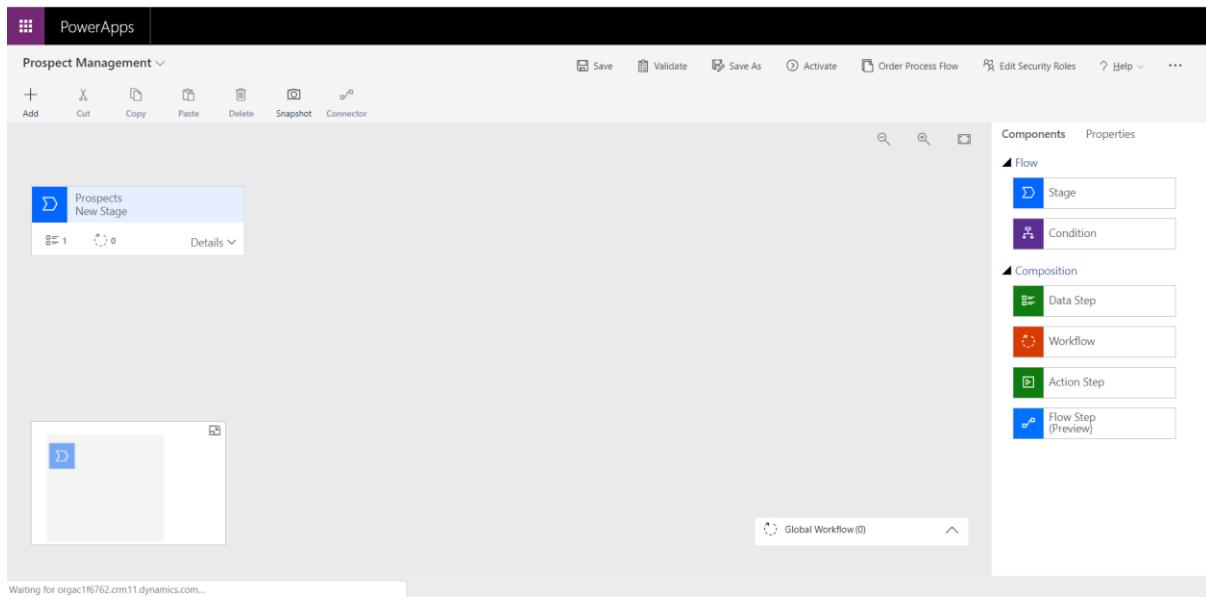
The screenshot shows the PowerApps Flows interface. On the left, there is a navigation sidebar with options like Home, Learn, Apps, Create, Data, Entities, Option Sets, Dataflows, Connections, Custom Connectors, Gateways, and Flows. The Flows option is currently selected. At the top right, it shows the environment as AIAD01 (orga1f6762). The main area is titled "Flows" and has three tabs: "My flows", "Team flows", and "Business process flows", with "Business process flows" being the active tab. Below the tabs, there is a table with columns for "Display name", "Last modified", and three processes listed: "Translation Process" (modified 3 wk ago), "Expired Process" (modified 3 wk ago), and "New Process" (modified 3 wk ago).

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.



This screenshot shows the "Create business process flow" dialog box overlaid on the PowerApps Flows page. The dialog has fields for "Display name" (Prospect Management), "Name" (new_prospectmanagement), and "Common Data Service entity" (Prospects). At the bottom, there are "Next" and "Cancel" buttons.

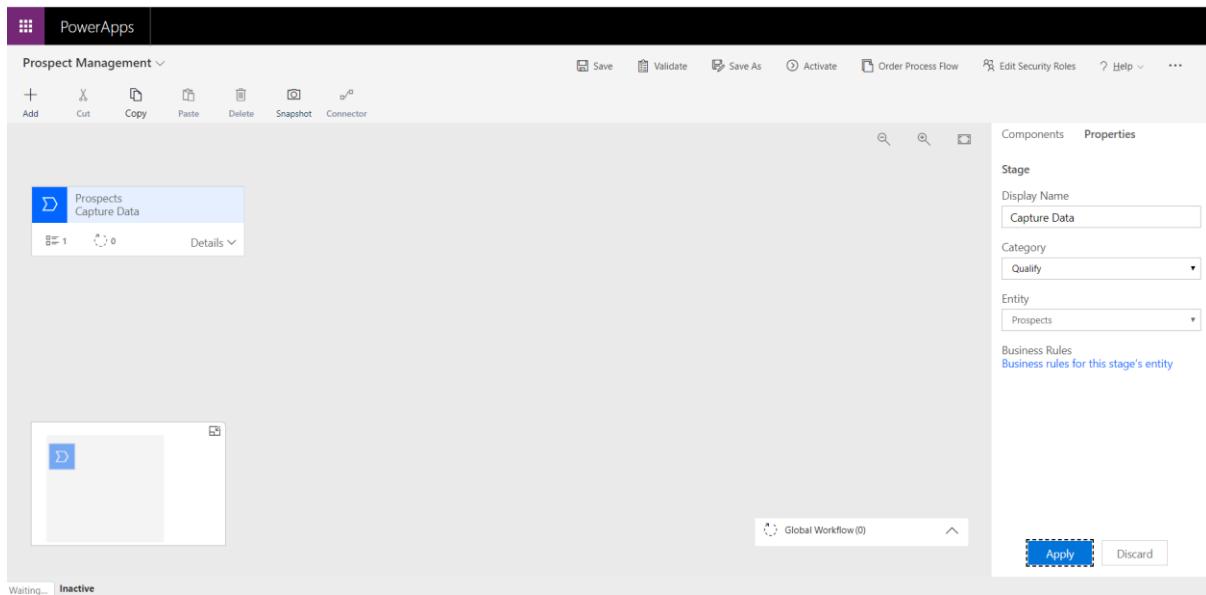
You will then be directed to a new browser tab that will expose the Flow Business Process Designer. The designer provides a drag and drop experience which really enables users to understand what the process will really look like.



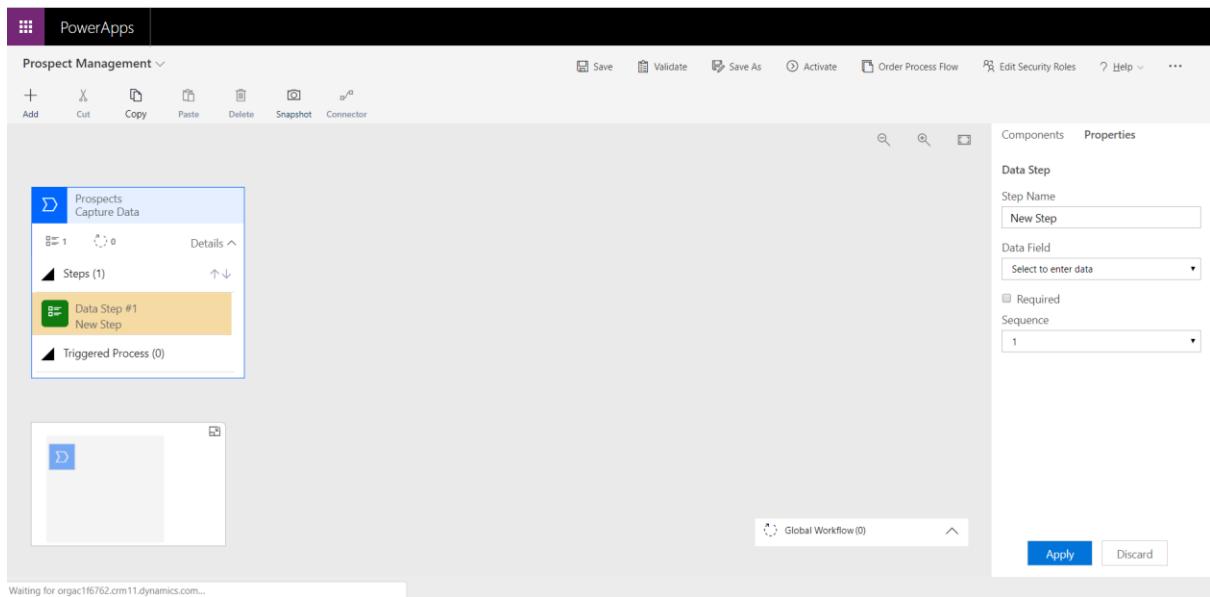
To start off configuring the Prospect Management process, select the first Prospects stage. On the right-hand side, in the “Properties” tab enter in the following information:

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

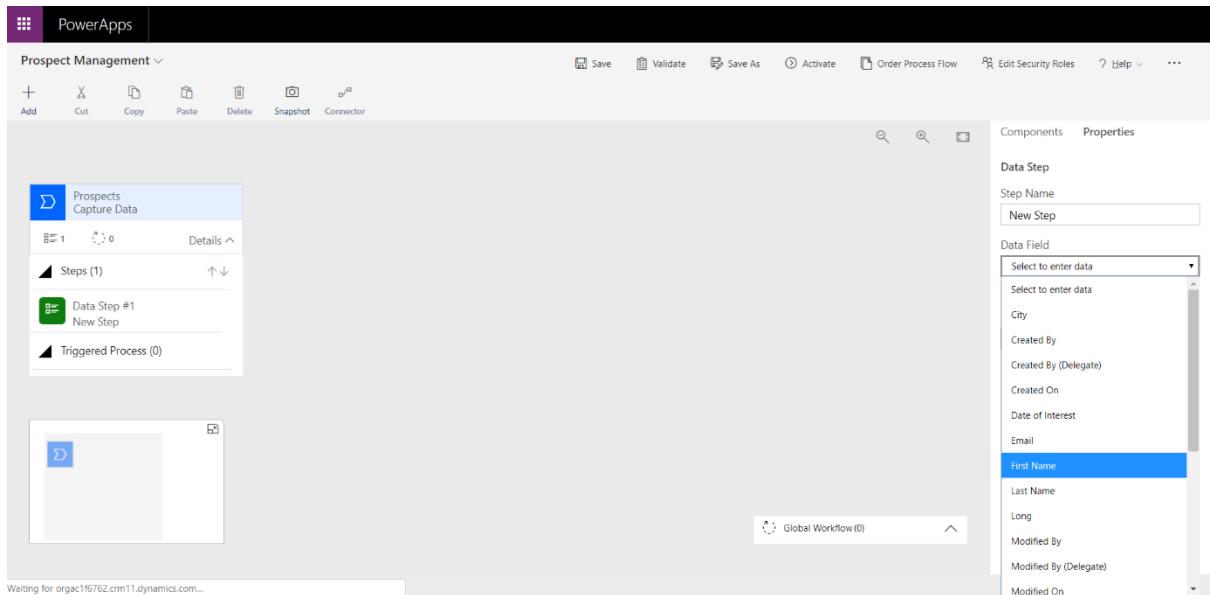
You MUST hit the “Apply” button at the bottom of the properties tab.



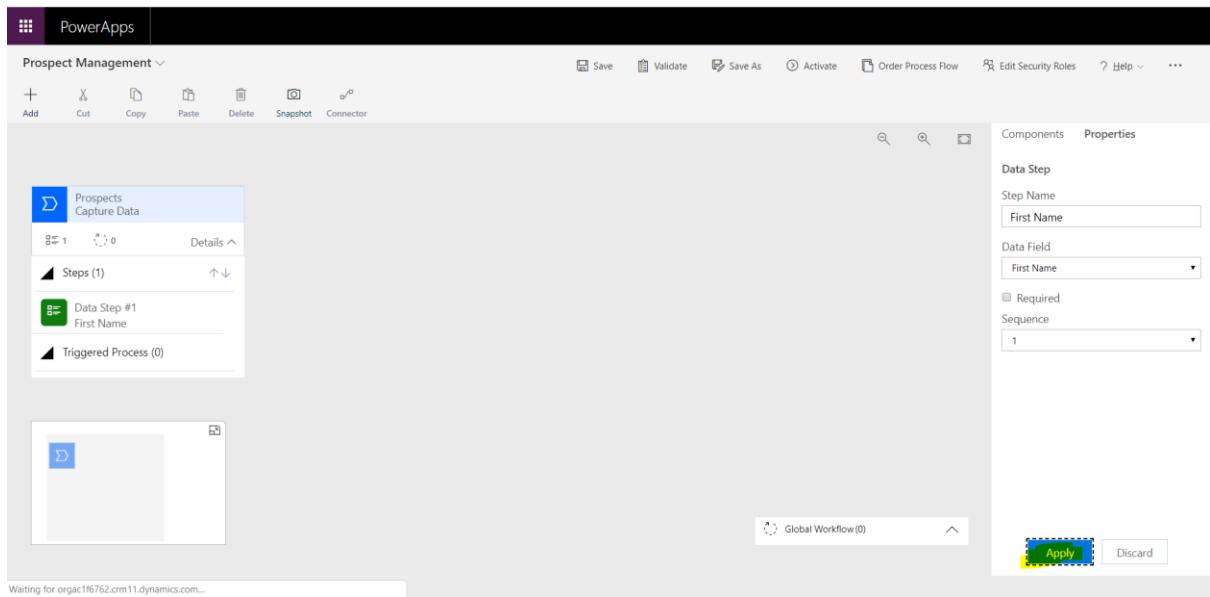
Expand the first stages details section to view the various Data Steps. Select the first Data Step to view the properties pane on the right-hand side.



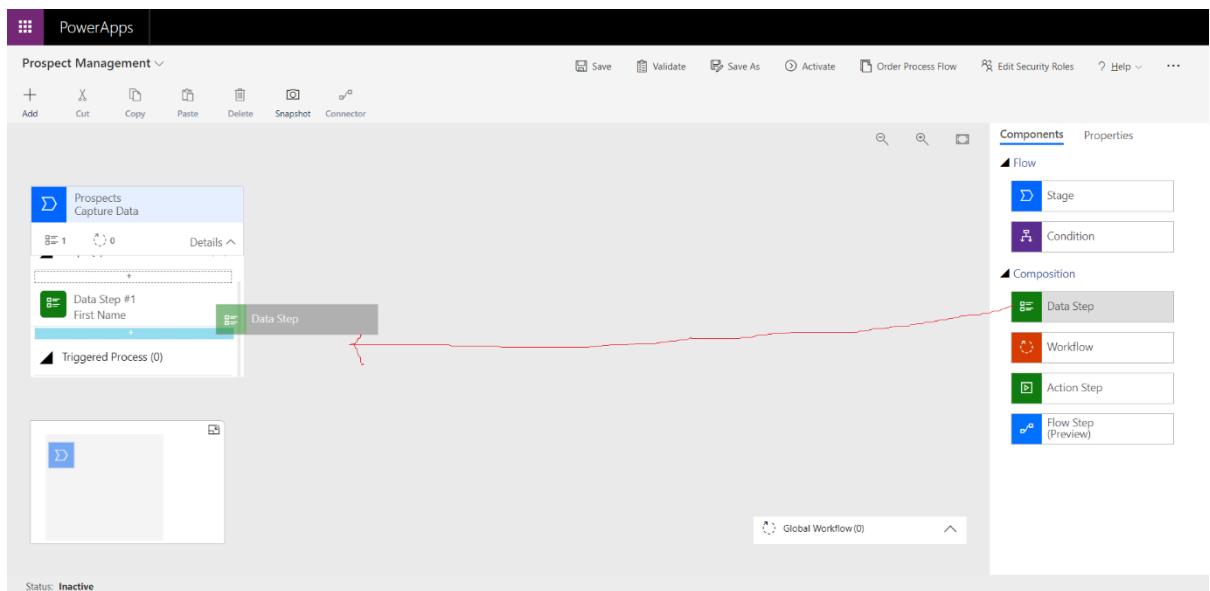
Expand the Data Field option set and select “First Name” value.



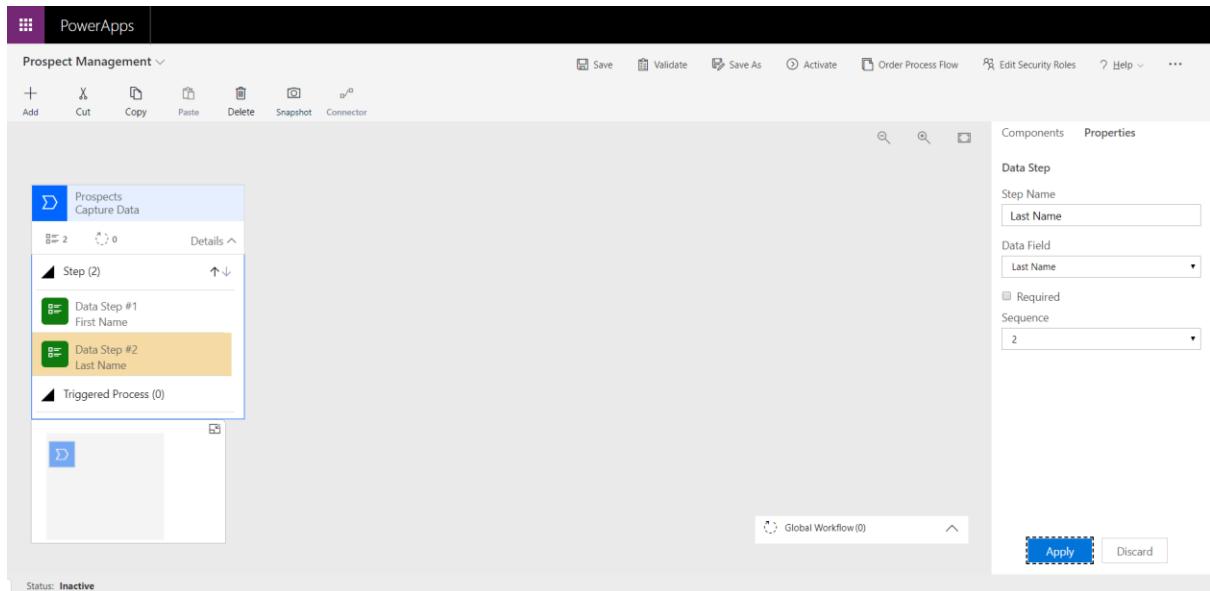
Once selected the “Step Name” property will automatically be changed to the value selected in the “Data Field” property. Select “Apply” at the bottom of the properties pane to apply this update to the data step.



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.



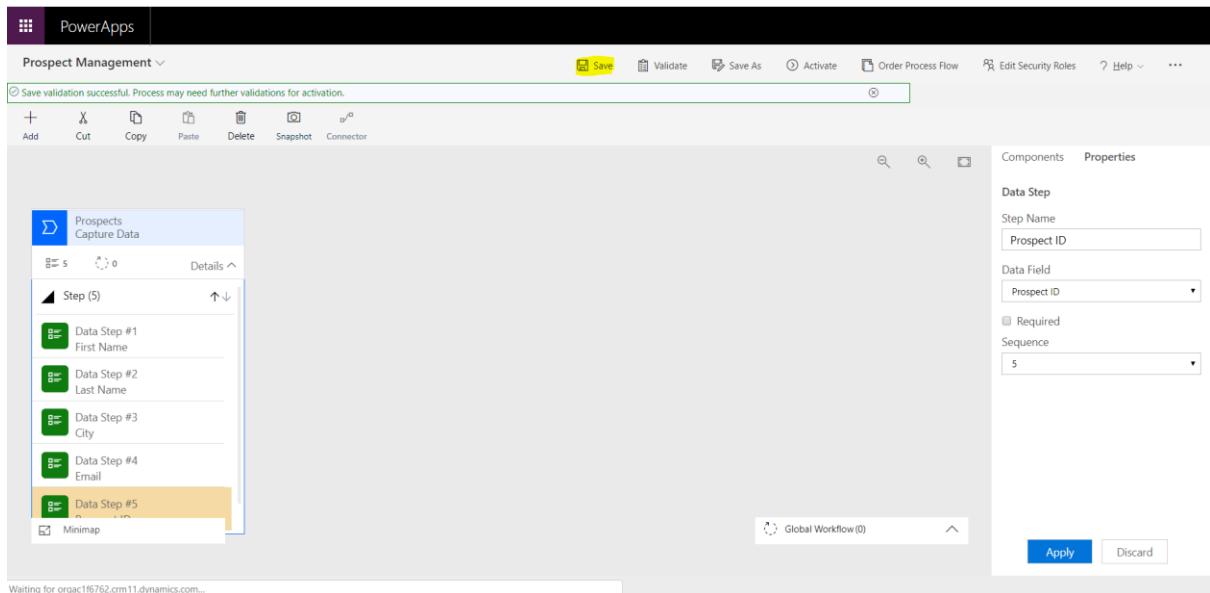
Select “last Name” as the value in the “Data Field” property. Apply this change using the “Apply” button at the bottom of the properties pane.



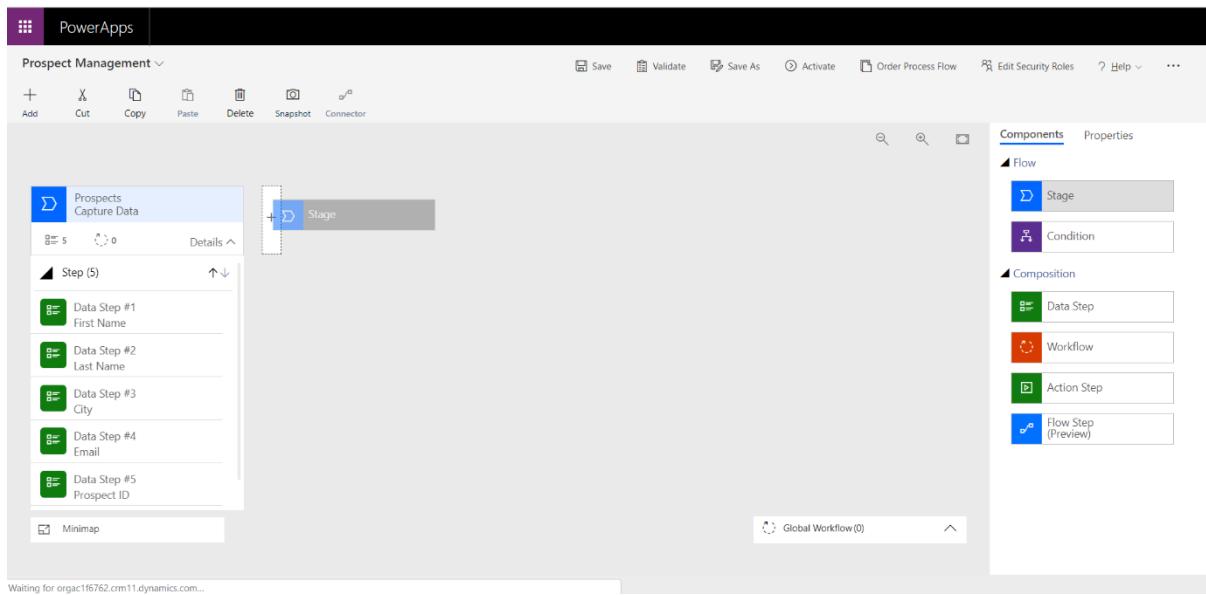
Follow the Exact same process as above by adding the below data steps to the first stage:

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.



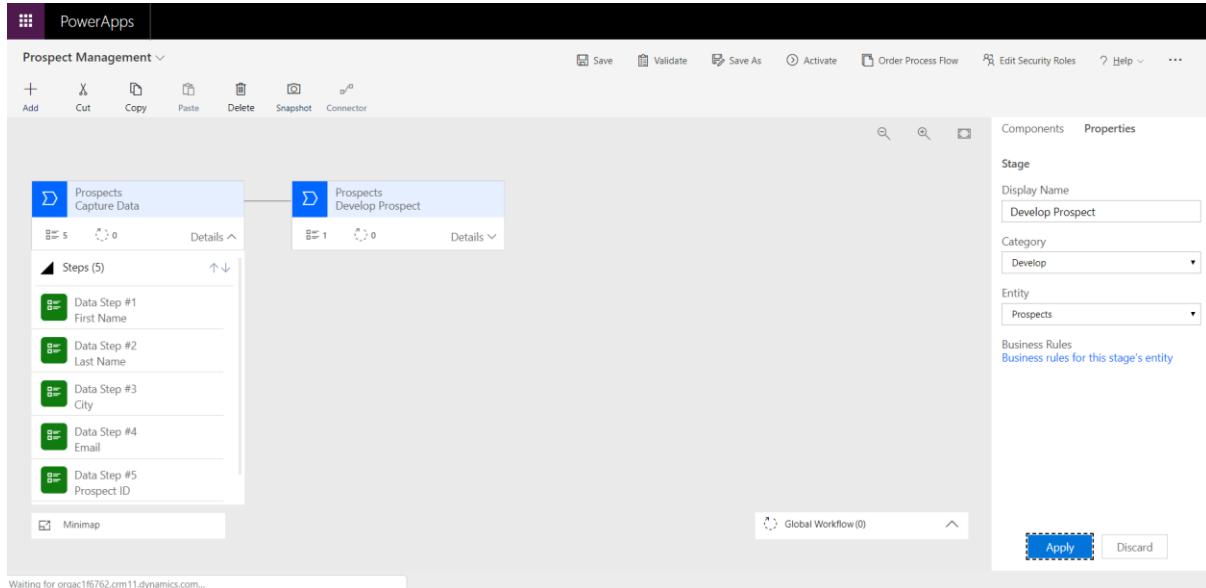
You are now ready to add another stage to your Business Process Flow. Select the “Components” pane from the right-hand side of the page and drag a new stage into the area on the right of the first “Capture Data” stage.



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 I the following properties:

1. Display Name: "Complete Prospect"

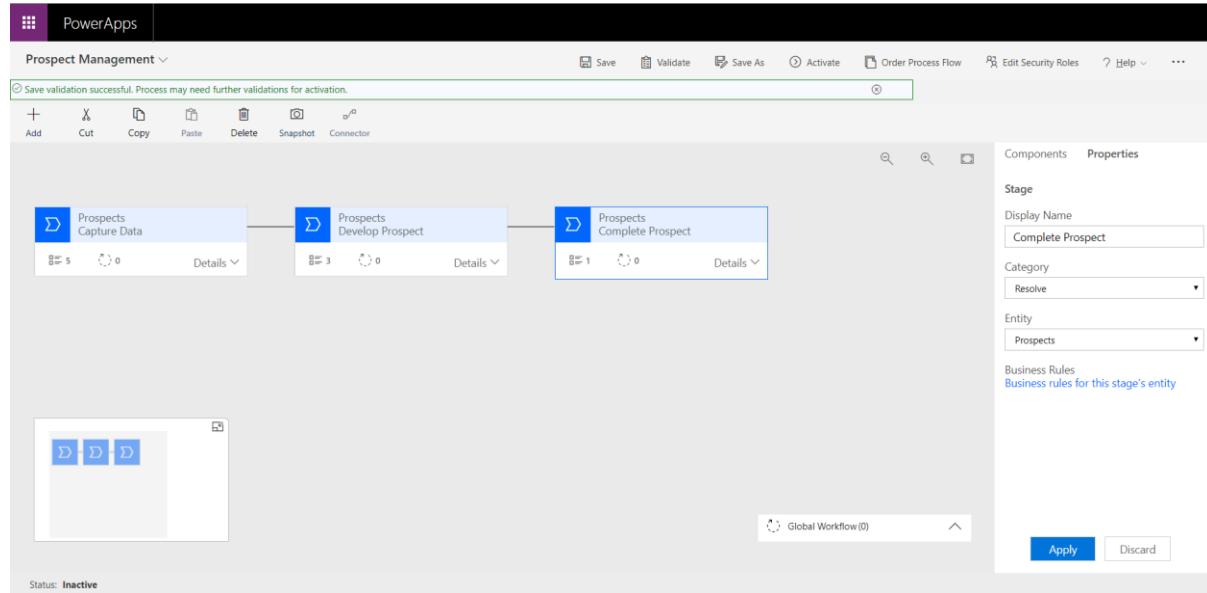
2. Category: Resolve

3. Entity: Prospects

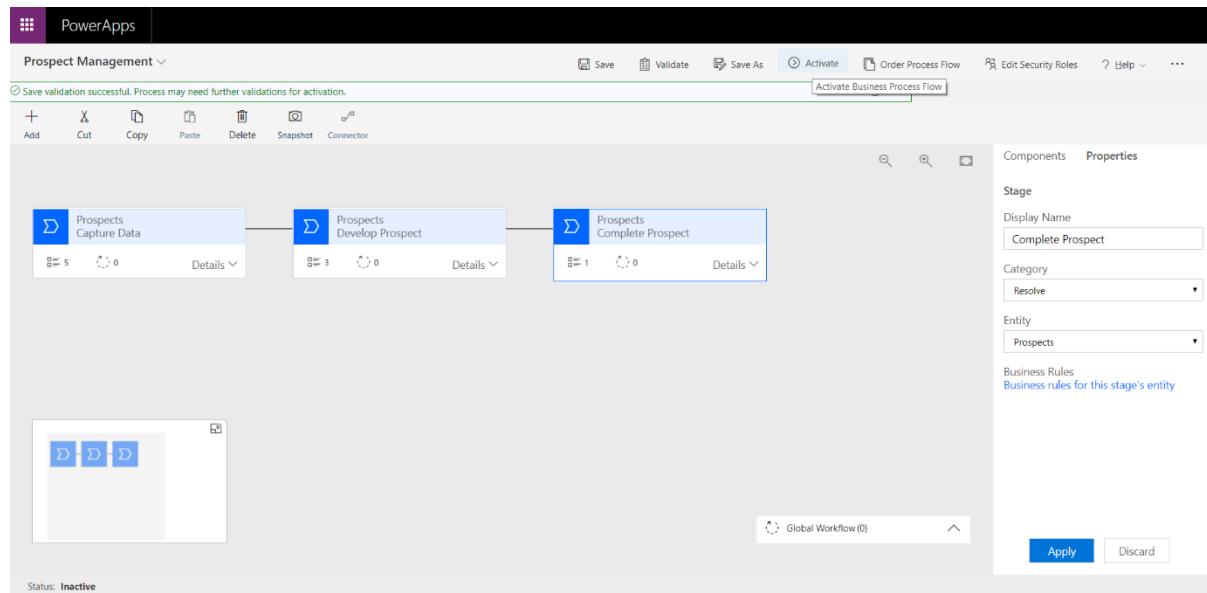
Add in the following Data Steps:

1. Satisfaction Rating

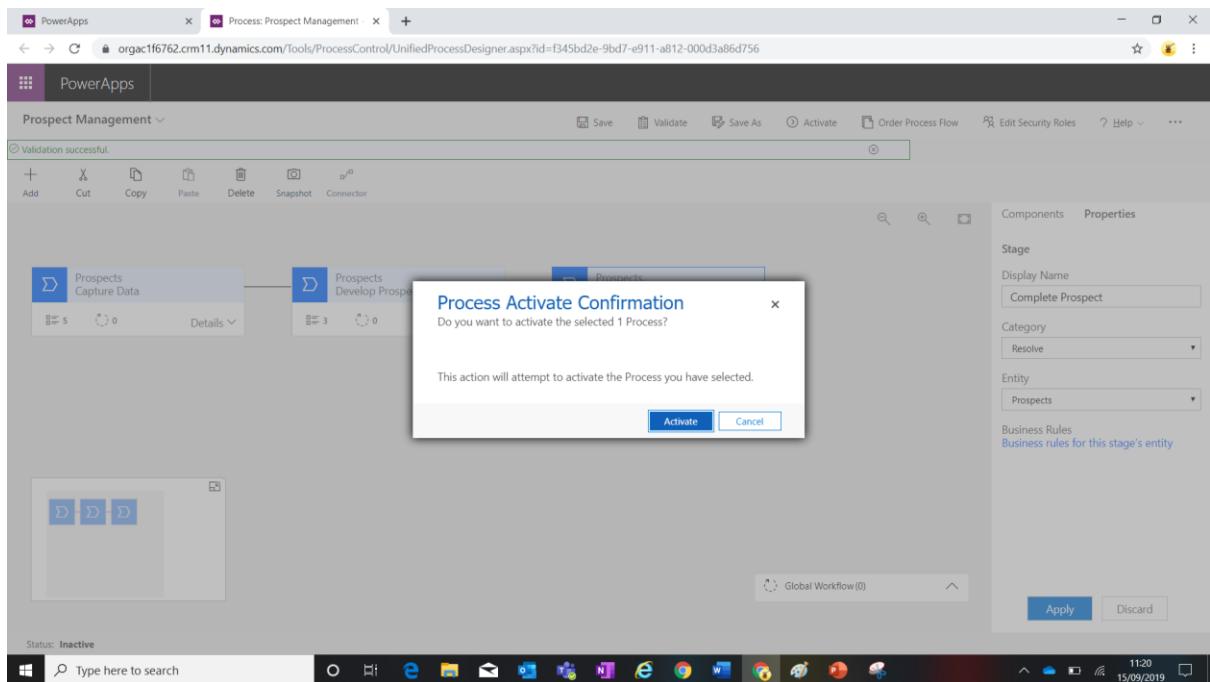
Remember to Apply all changes on all stages and steps and save all changes to the process.



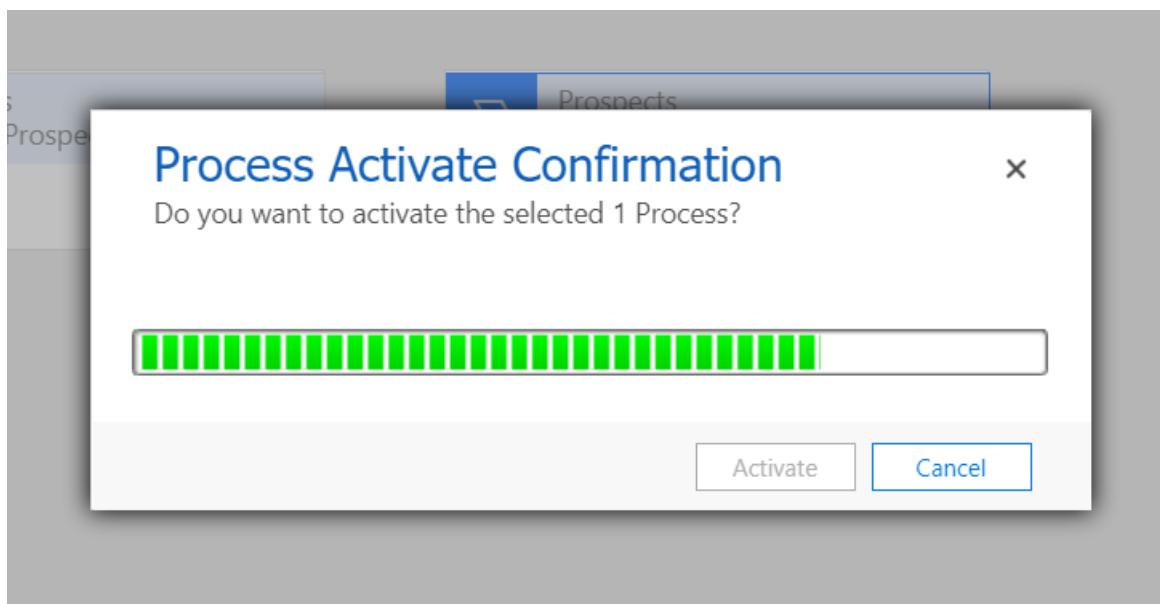
Finally, to activate the business process flow, select the “Activate” button from the toolbar.



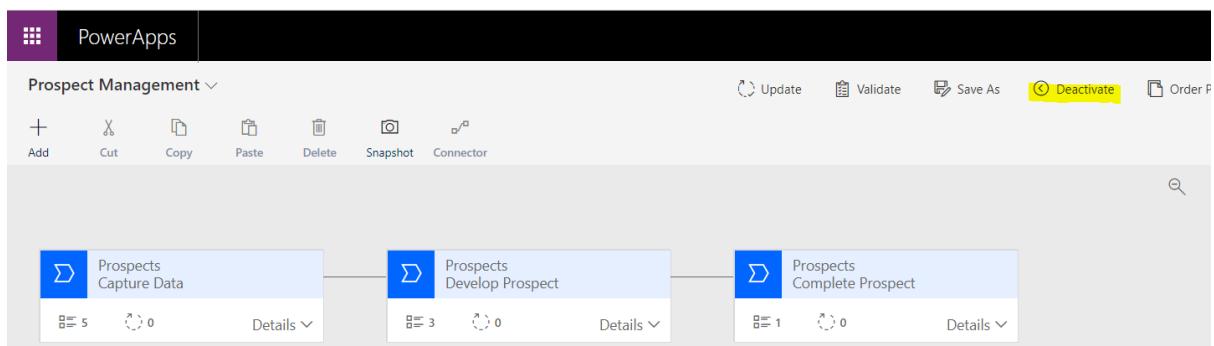
This will start the activation process. Select “Activate” from the popup.



You will see the process starting to activate.



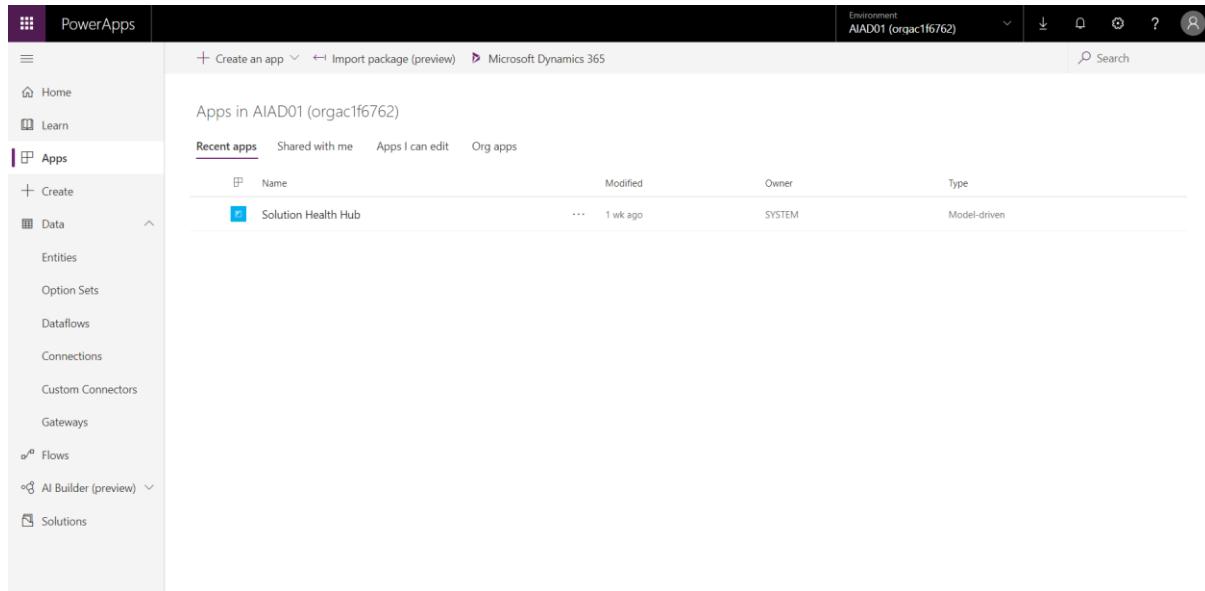
Once activated the “Deactivate” button is then visible in the toolbar in the associated Business Process Flow.



Model Driven Application

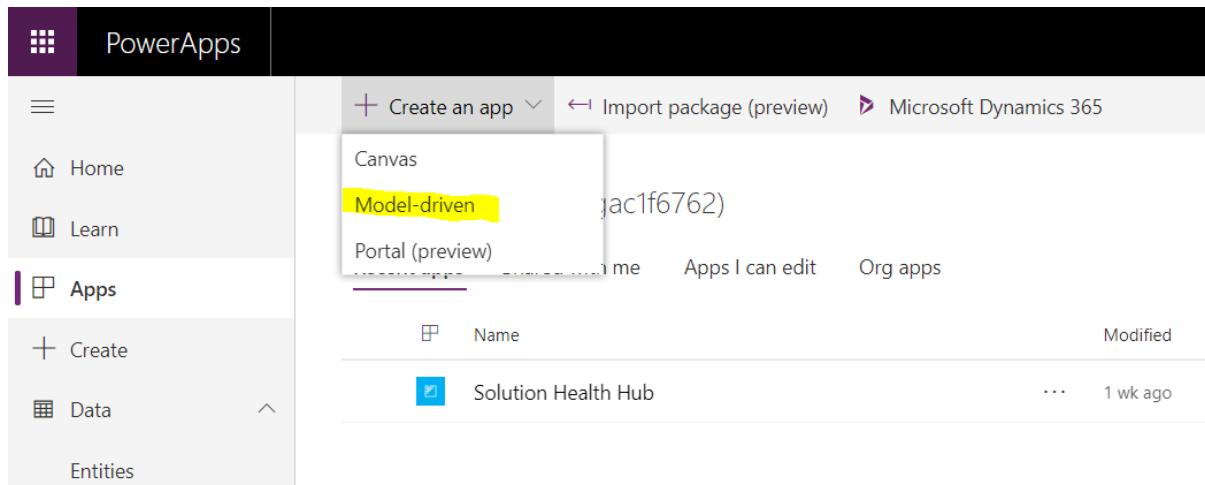
Now that we have created the business process flow, we need to generate the Model Driven Application that will display this to the mid office user.

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



The screenshot shows the PowerApps maker Experience interface. The left sidebar is titled "PowerApps" and includes sections for Home, Learn, Apps (which is currently selected), Create, Data, Entities, Option Sets, Dataflows, Connections, Custom Connectors, Gateways, Flows, AI Builder (preview), and Solutions. The main content area is titled "Apps in AIAD01 (orgac1f6762)" and shows a table of recent apps. The table has columns for Name, Modified, Owner, and Type. One app, "Solution Health Hub", is listed with a blue icon, modified "1 wk ago", owner "SYSTEM", and type "Model-driven". At the top of the main area, there are buttons for "Create an app", "Import package (preview)", and "Microsoft Dynamics 365".

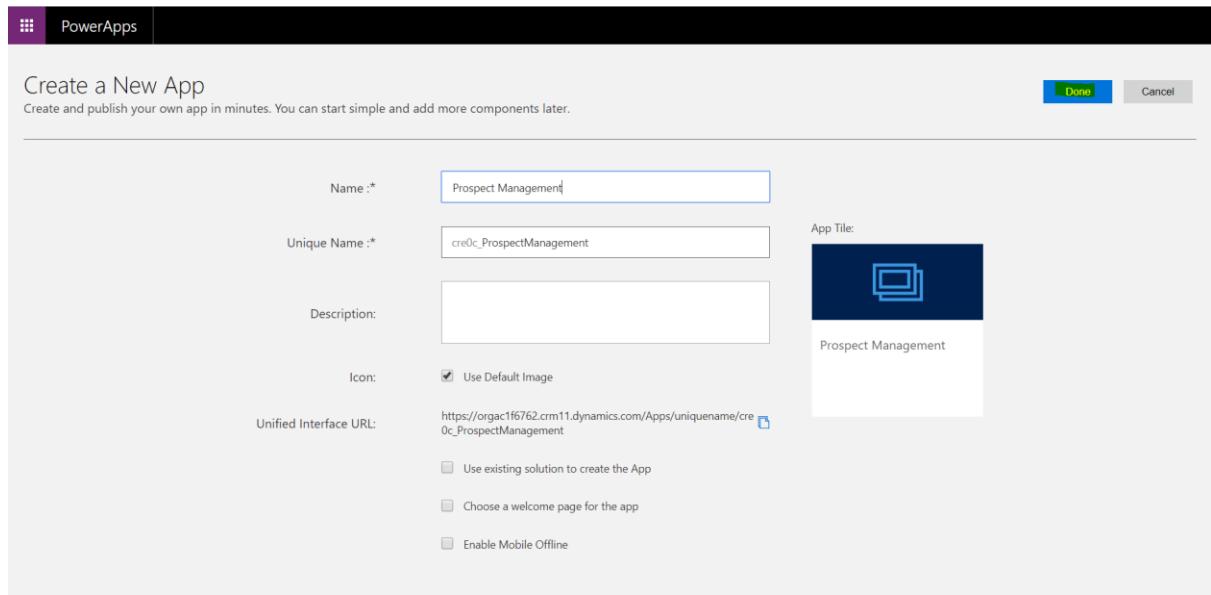
To create a new Model Driven Application, select “Create an App” from the top left of the App screen and then select “Model Driven App”.



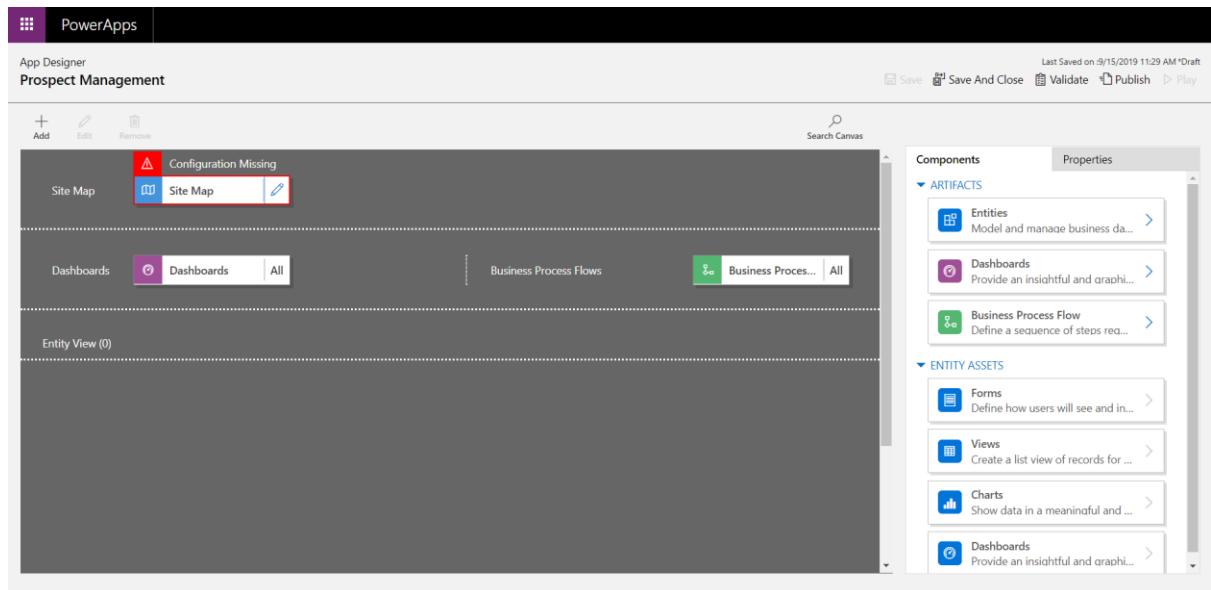
This screenshot is similar to the previous one, but the "Create an app" button in the top navigation bar is highlighted with a yellow box. A dropdown menu has appeared, listing "Canvas", "Model-driven" (which is also highlighted with a yellow box), and "Portal (preview)". Below the dropdown, the main app list is visible, showing the "Solution Health Hub" entry.

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.

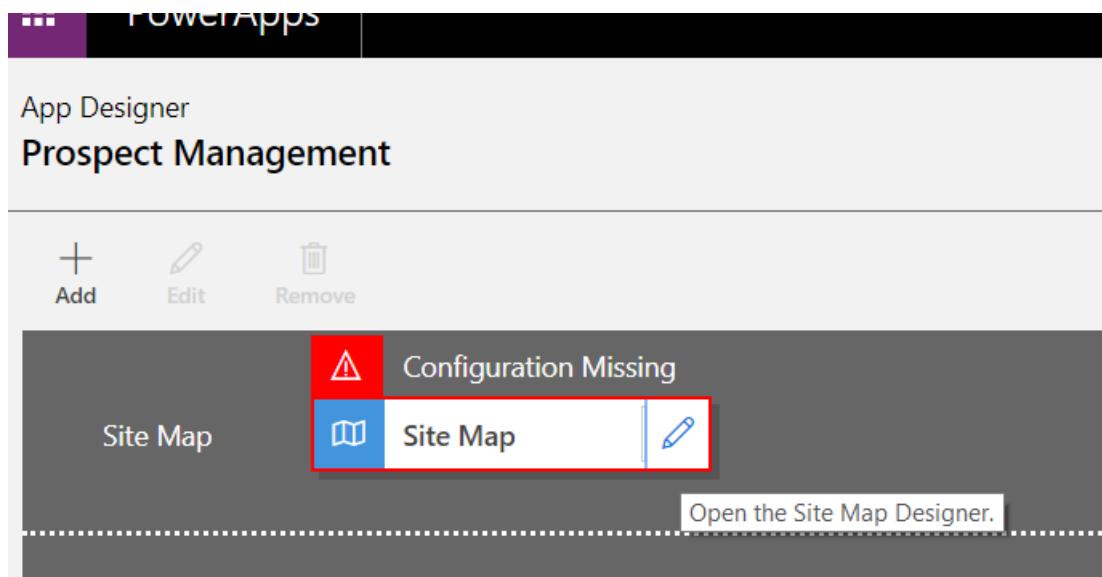
Call the model-driven app “Prospect Management” and select the “Done” button on the right-hand side of the page.



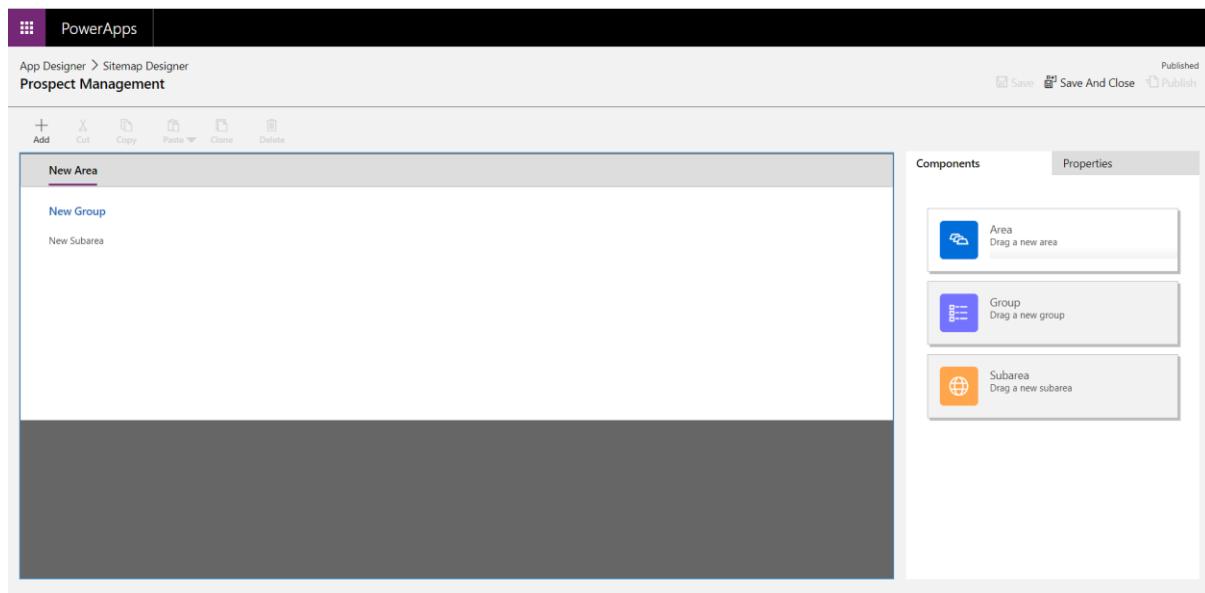
The model-driven app designer screen will be made available to you to begin designing your new app.



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. The main workspace shows a single item labeled 'New Area'.

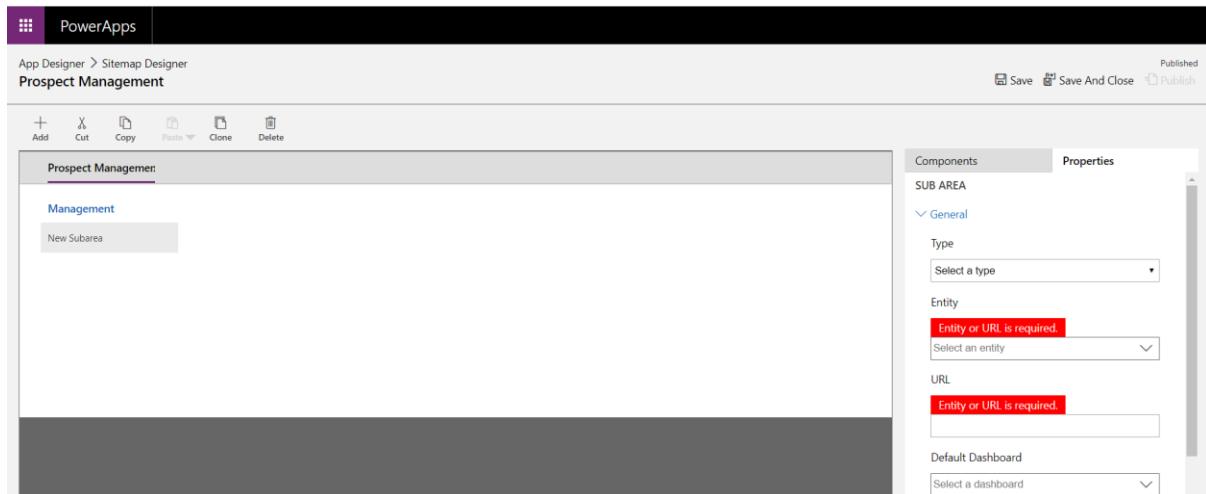
Change the Title to “Prospect Management”.

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'. All other properties remain the same as in the previous screenshot. The main workspace still displays the single item 'Prospect Management'.

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

This screenshot shows the PowerApps Sitemap Designer interface again, but this time a new group component has been added and renamed. The 'Title (1033)' field for the new group is now 'Management'. The rest of the properties and the workspace are identical to the previous screenshots.

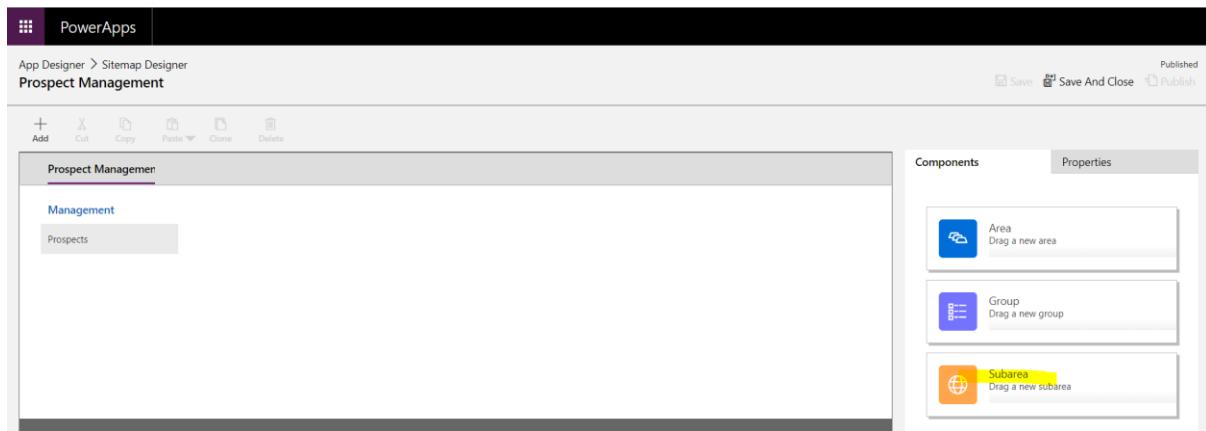
Select the “New Sub area” component



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.



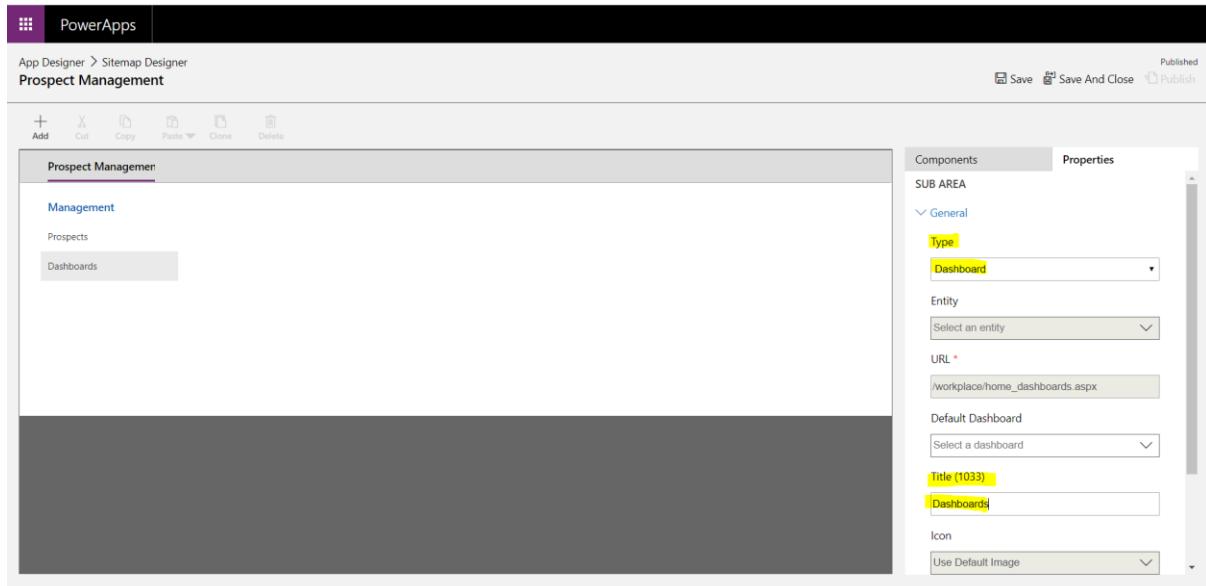
Drag and drop a new “Subarea” component under the Prospects component in the sitemap.



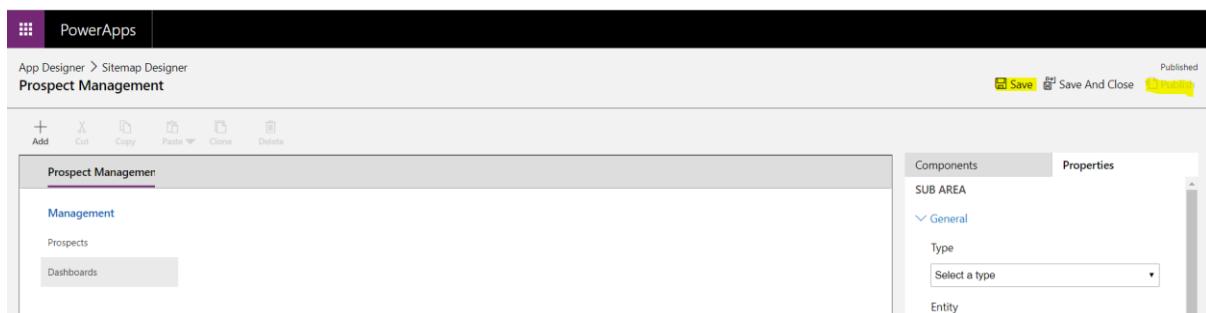
Update the following Subarea properties:

Type: Dashboard

Title: "Dashboards"



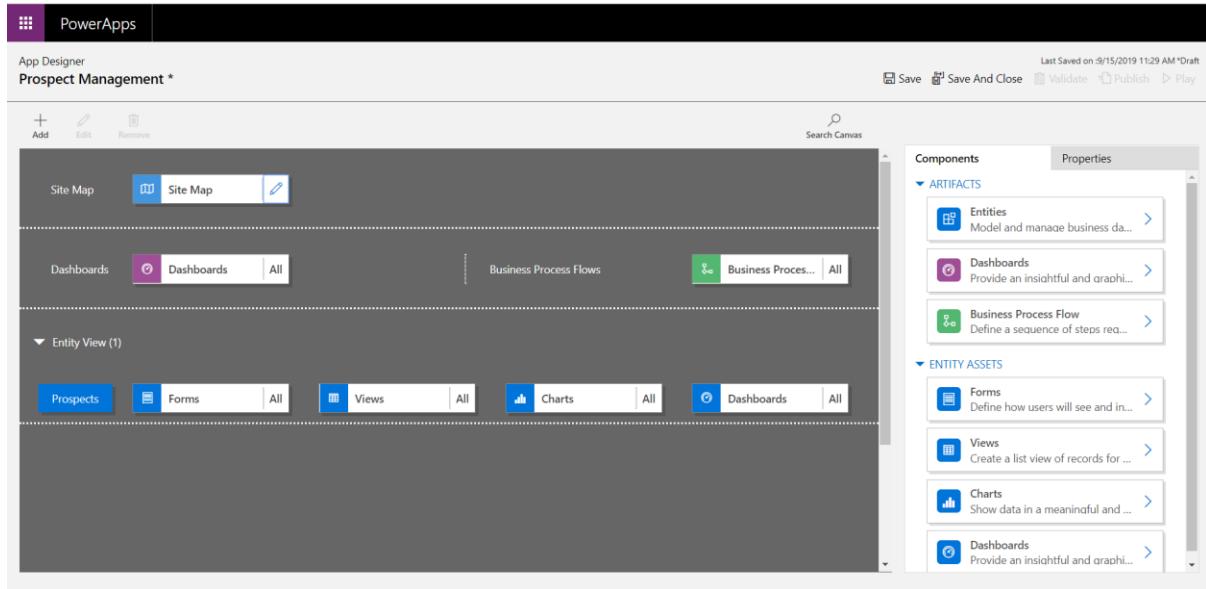
Save and Publish your sitemap changes.



Once this has been published, Save and close your form



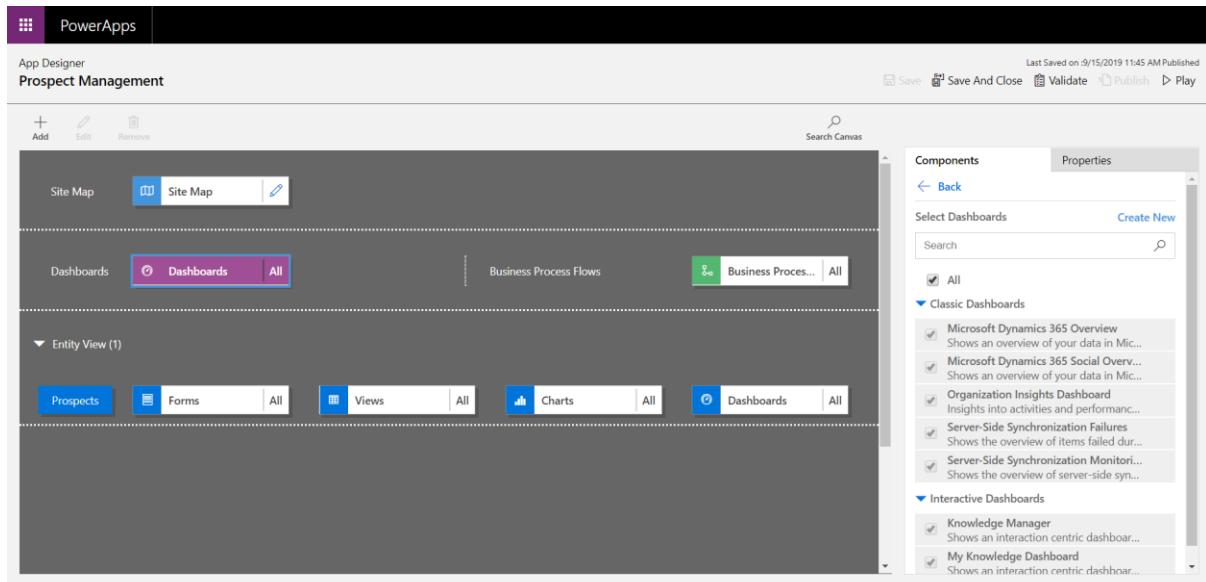
You will now see that the prospect Entity has now been added to your entity list in your application:



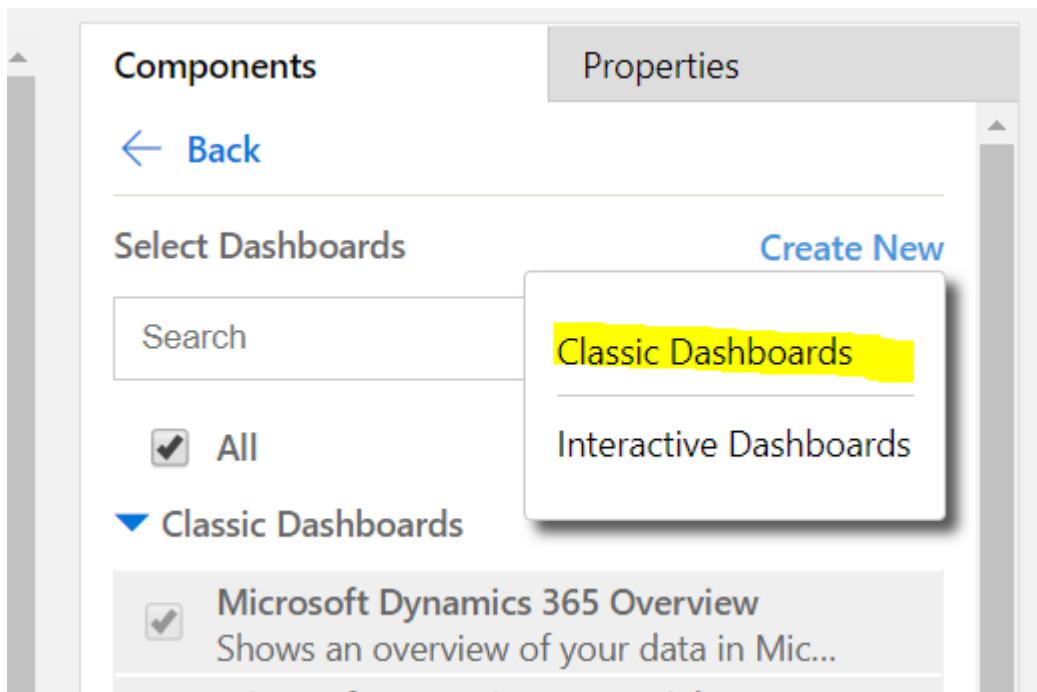
Dashboards

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.

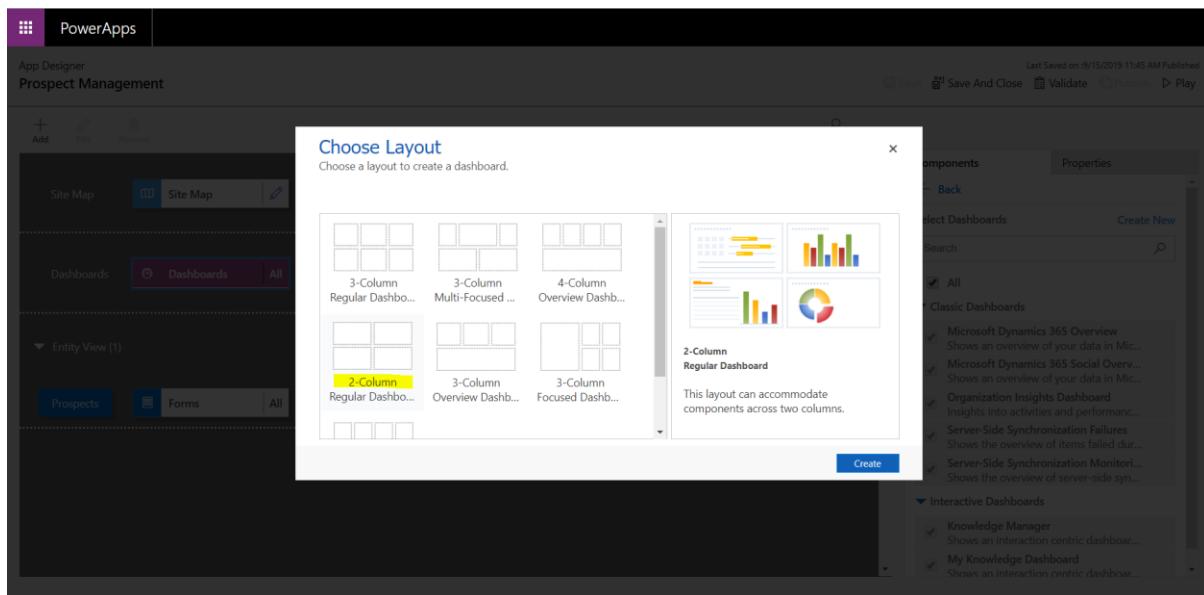
Select the “Dashboards” component from the App Designer and you will see all the available system dashboards on the right in the Components pane.



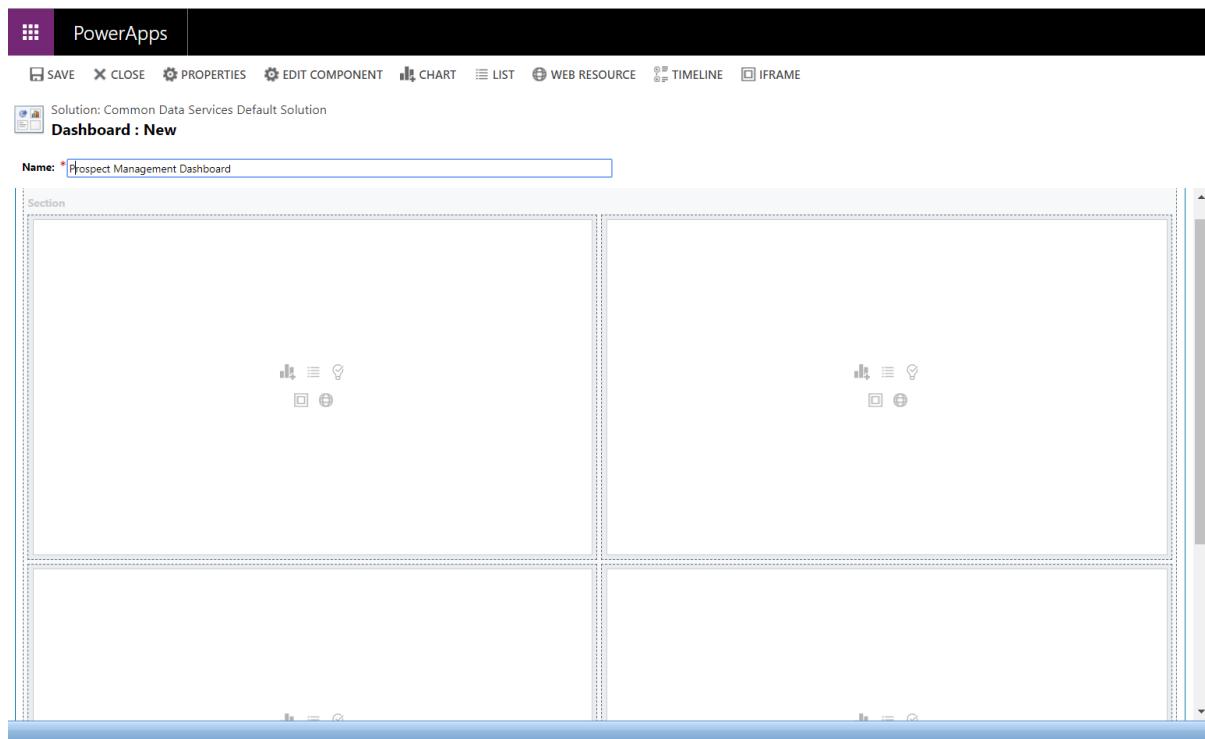
Select “Create New” and then select “Classic Dashboards”.



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

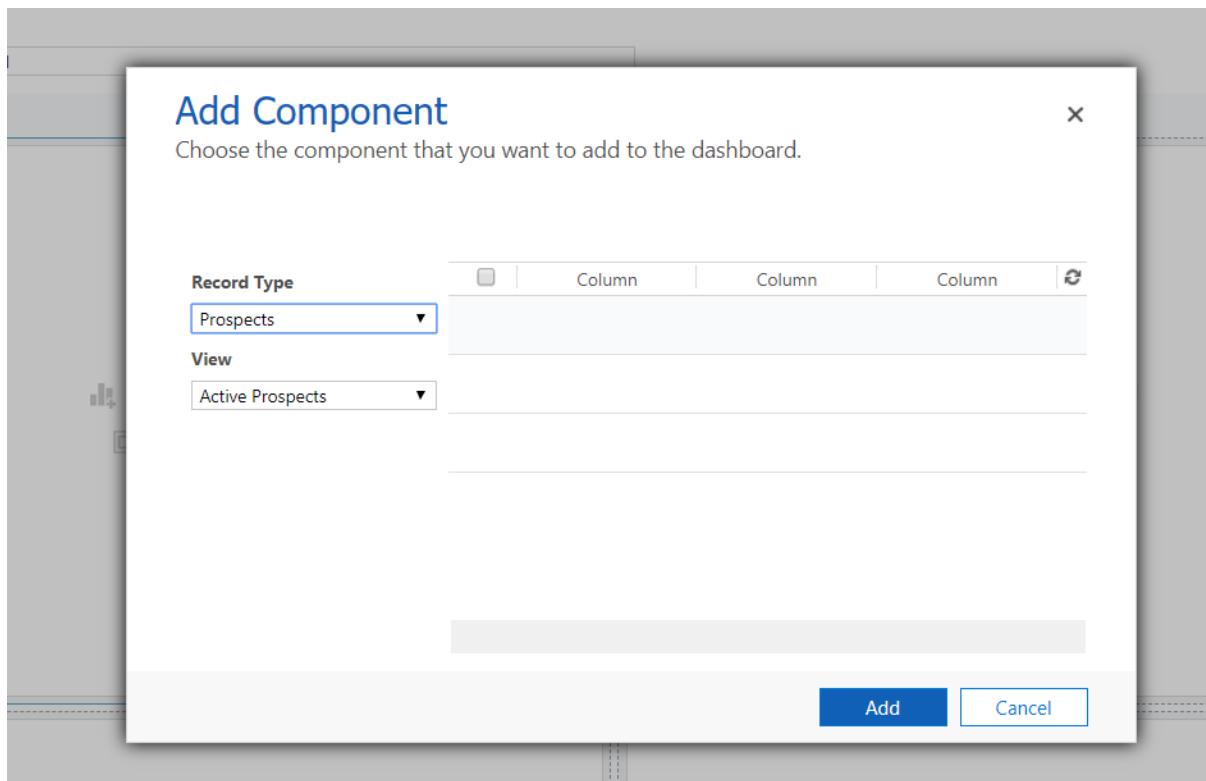
Section



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”.



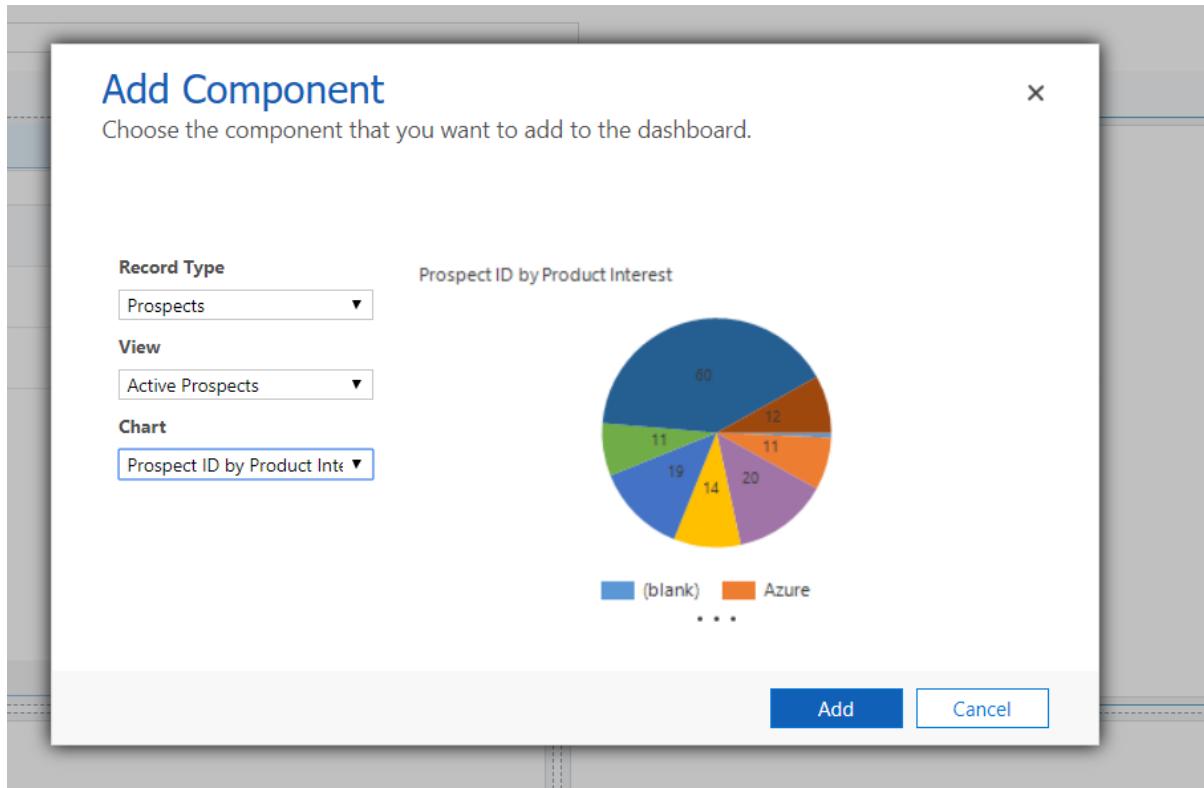
Move onto the top right panel in the Dashboard Designer and select the “Chart” option in the panel.



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

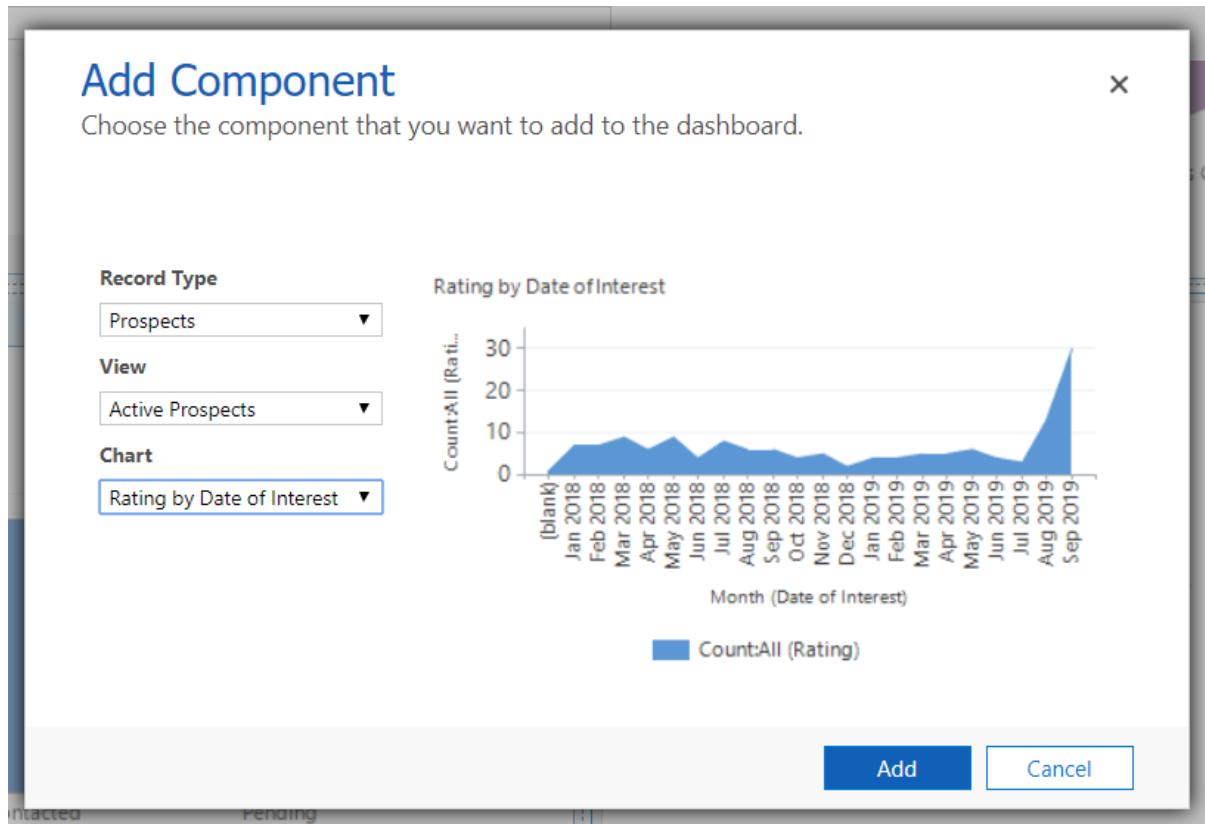
Prospect ID by Status

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

Add **Cancel**

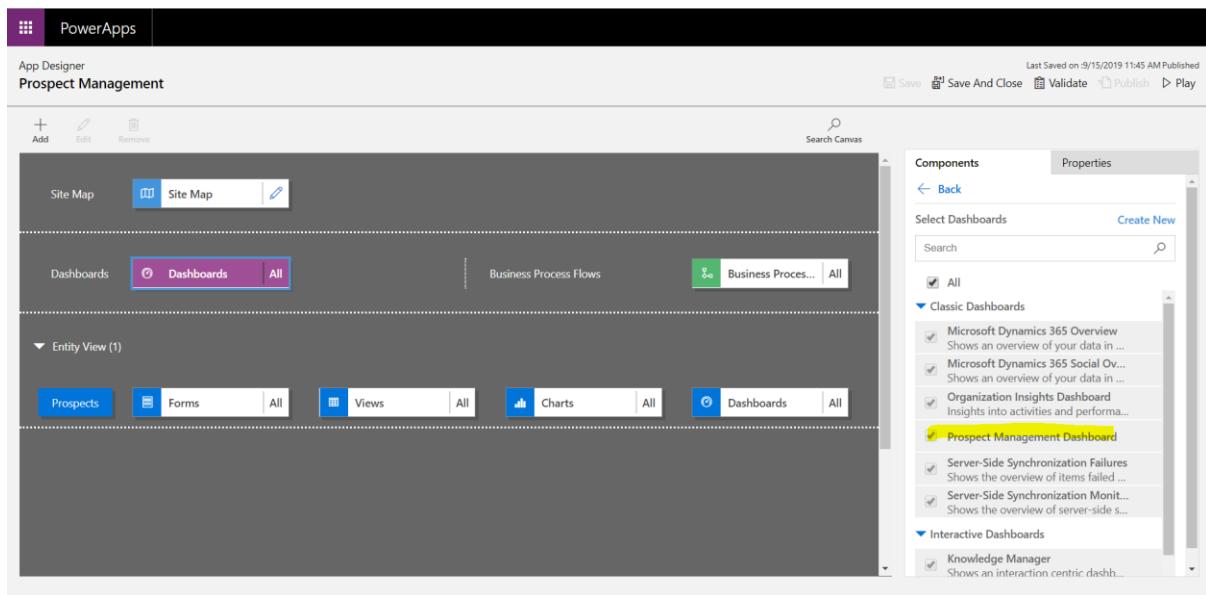
Fourth Pane:

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

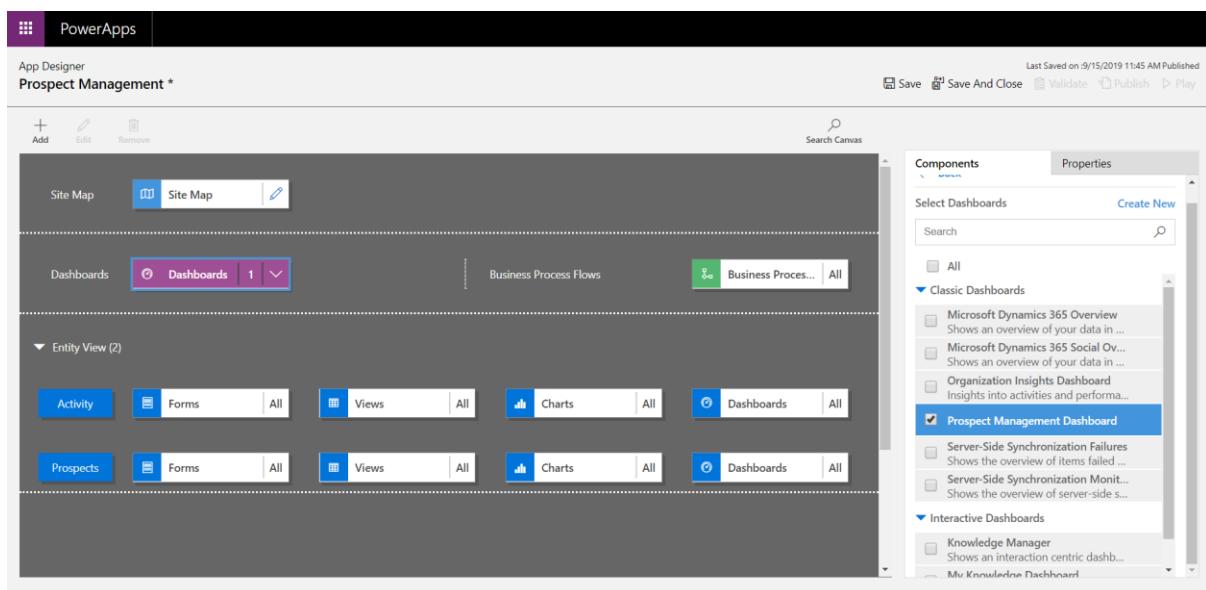


Ultimately, your Dashboard should look like the image below. Save your Dashboard and then hit the “Close” button.

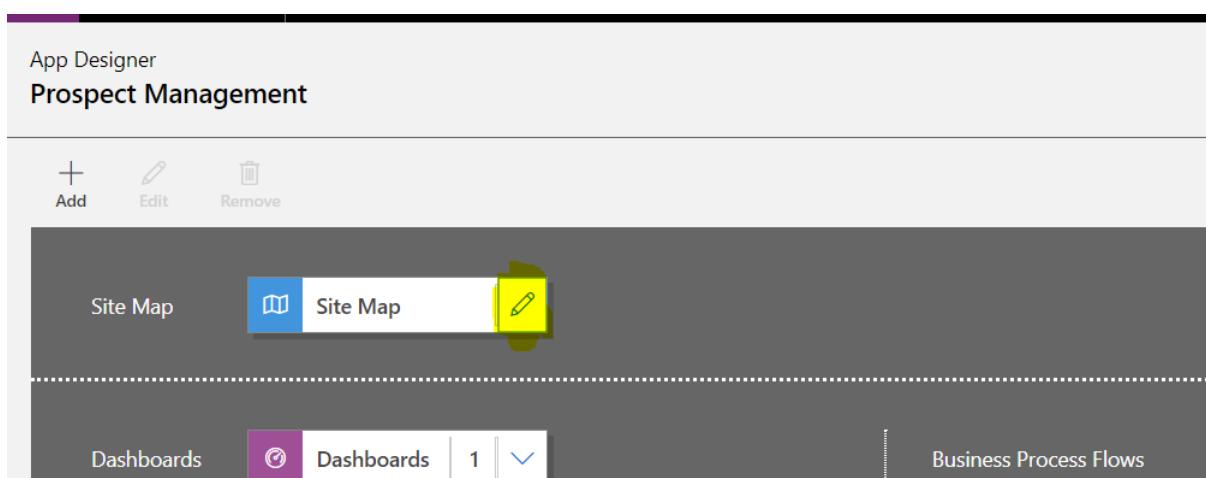
You will then be taken back to the model-driven App Designer experience where you will see your dashboard in the list with the other dashboards. If you do not see it there, simply select another component on the page and then click back into the Dashboards component.



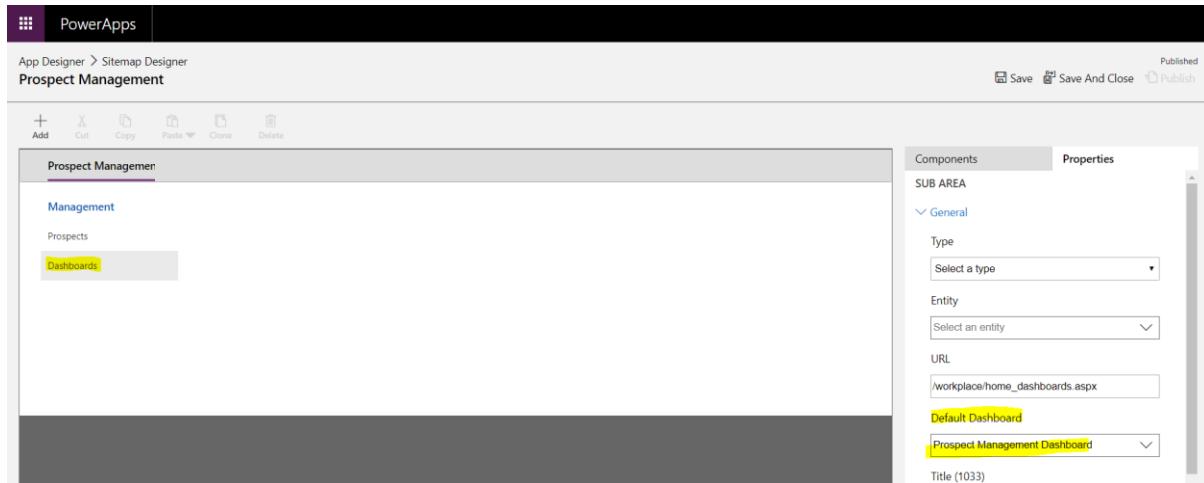
To improve the user experience and only show users information that is relevant to them, deselect all of the dashboards and ONLY select the “Prospect Management Dashboard” from your list.



Click to edit your sitemap once again



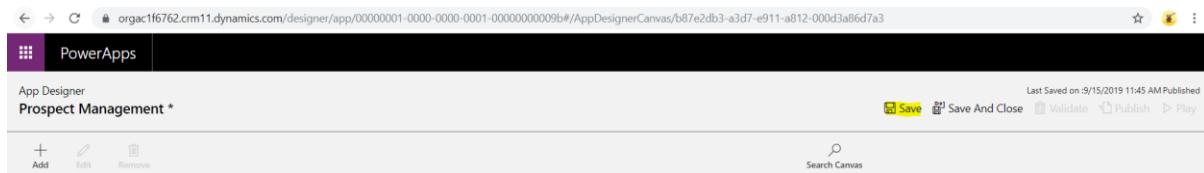
Select your “Dashboards” subarea component from the sitemap and update the default dashboard to “Prospect Management Dashboard”.



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) 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 grid of prospect records 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 a Microsoft PowerApps environment. The left sidebar includes links for 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 Inter..., Status, and Created On. The table contains six rows of prospect data. Below the table is a navigation bar with letters A-Z and a "Dense 1" button.

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

The screenshot shows the Prospect Management Dashboard with a pie chart titled "Prospect ID by Product Interest". The chart is divided into several segments, each labeled with a number representing the count of prospects: 60 (green), 20 (orange), 14 (purple), 19 (yellow), 11 (blue), and 12 (light blue). Below the chart is a legend listing product interests: Azure, Dynamics 365 Bus Central, Dynamics 365 CE, Dynamics 365 FinOps, MS Teams, Power Platform, and SharePoint, each represented by a colored circle.

Lab 4: Configuring your Microsoft Flow Notifications*

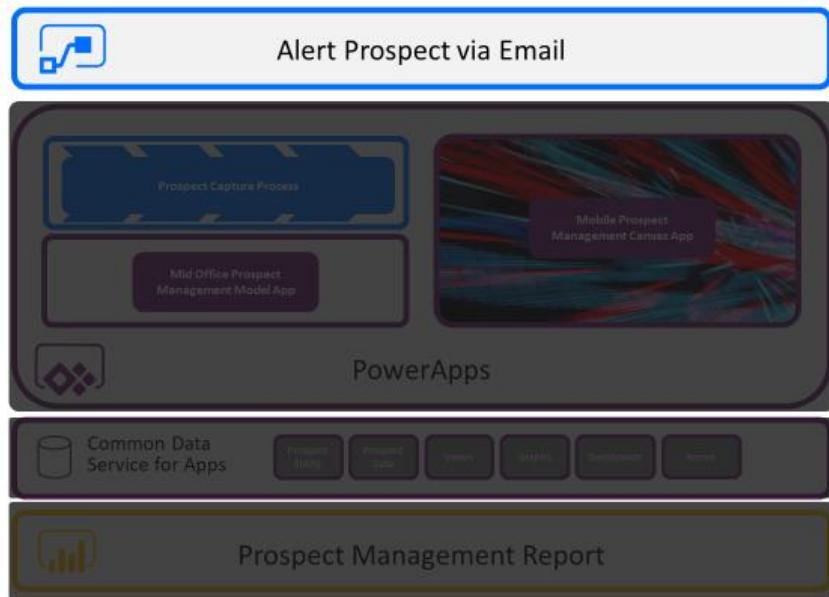
In this lab we will configure an Automated Flow to alert the captured prospect that their information has been captured and that they are being taken through the prospect qualification process.

Please Note:

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

Solution Components

Microsoft Flow



Let's Begin

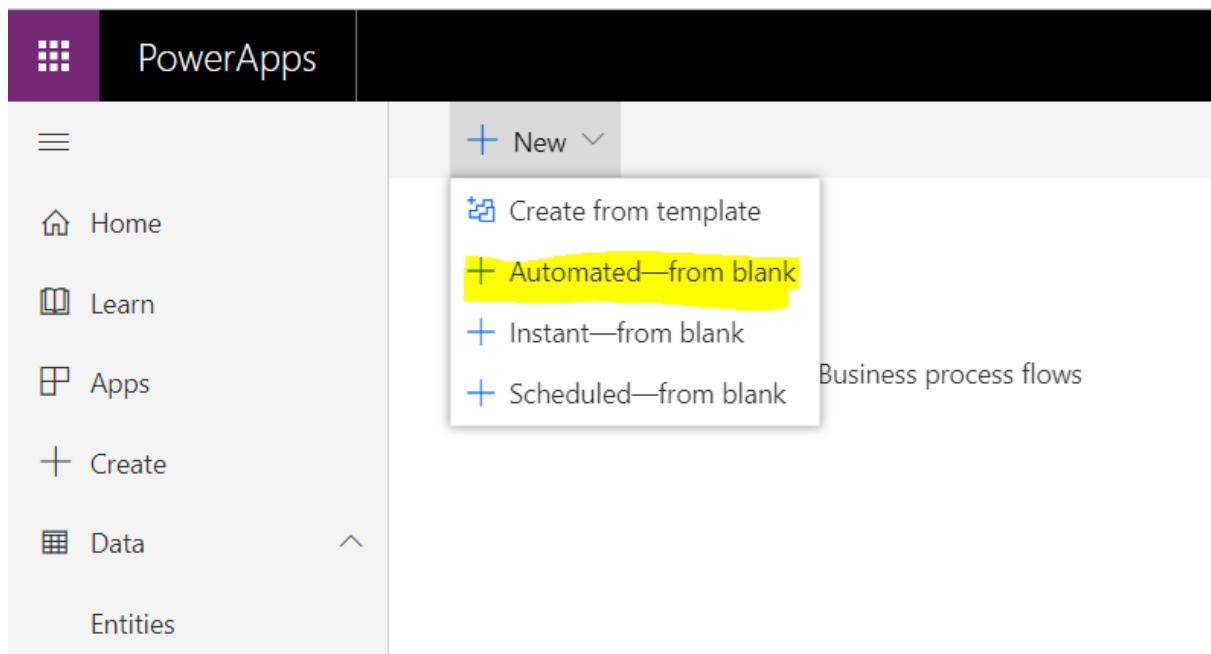
Microsoft Flow

Navigate to the maker Experience ([make.powerApps.com](https://make.powerapps.com)) and select Flows from the menu on the left.

The screenshot shows the Microsoft Flow maker Experience interface:

- Header:** PowerApps, Environment AIAD01 (orga1f6762), Search bar.
- Left Sidebar:**
 - Home
 - Learn
 - Apps
 - Create
 - Data
 - Entities
 - Option Sets
 - Dataflows
 - Connections
 - Custom Connectors
 - Gateways
 - Flows
 - AI Builder (preview)
 - Solutions
- Main Content:**
 - Flows** tab selected.
 - My flows** section: Shows a large circular icon with three horizontal lines and the text "You don't have any flows".
 - Helpful links:** Choose from 100s of templates to start automating your workflows.

Select “Automated – Create from Blank”.



Enter in a name for your new Flow: "Alert Prospect" and select "When record is created" as the trigger. Then elect "Create"

Build an automated flow



Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

Flow name
Alert prospect

Choose your flow's trigger * ⓘ

Common

- When a record is updated
Common Data Service ⓘ
- When a record is created
Common Data Service ⓘ
- When a record is deleted
Common Data Service ⓘ
- When a record is created, updated or d...
Common Data Service (current environment) ⓘ
- When the state of an agreement changes
Adobe Sign ⓘ

[Skip](#) [Create](#) [Cancel](#)

The flow designer will appear with various points for the trigger that need to be defined. The following properties need to be completed:

Environment: *The environment you Created*

Entity name: Prospects

Scope: Organisation

Once these have been filled in, add in a new step below this trigger by selecting “new Step”.

The screenshot shows the PowerApps Flow Designer interface. On the left, there's a navigation bar with options like Home, Learn, Apps, Create, Data, Entities, and Option Sets. The main area is titled "Alert prospect". A trigger card is displayed, showing "When a record is created" with the following settings: Environment: AIAD01 (orgac1f6762), Entity Name: Prospects, and Scope: Organization. Below the trigger card are buttons for "+ New step" and "Save".

In the action search for “Send Email” and select “Send Email V2”.

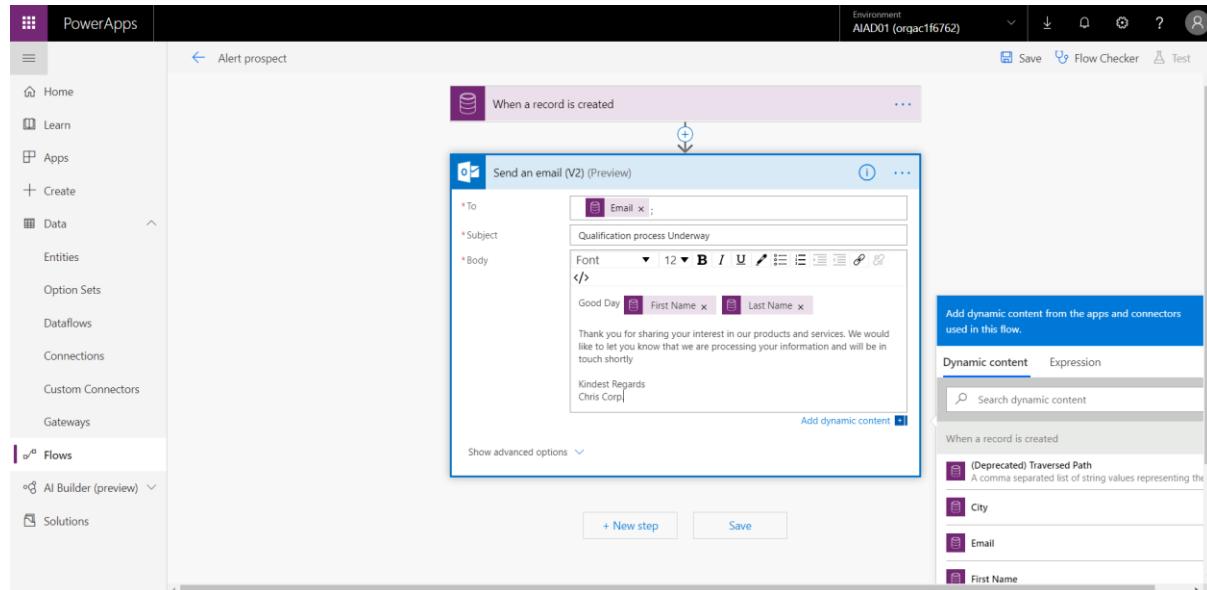
The screenshot shows the "Choose an action" dialog. At the top, it says "Choose an action" and has a search bar containing "Send Email". Below the search bar are tabs: All (selected), Built-in, Standard, Premium, Custom, and My clipboard. The main area displays a grid of icons for various actions: Mail, Notifications, Office 365 Outlook, Gmail, SMTP, Outlook.com, and SendGrid. Below this grid, there are two tabs: Triggers and Actions. The Actions tab is selected, showing four items: "Send an email notification (V3) Mail", "Send me an email notification Notifications", "Send an email (V2) Office 365 Outlook", and "Send an email Office 365 Outlook". Each item has a small icon and a "More details" button (indicated by a grey square).

You will need to personalise the email you are going to send to the prospect. Fill in the following by leveraging both Free Text as well as the dynamic content provided from the Common Data Service provided on the right.

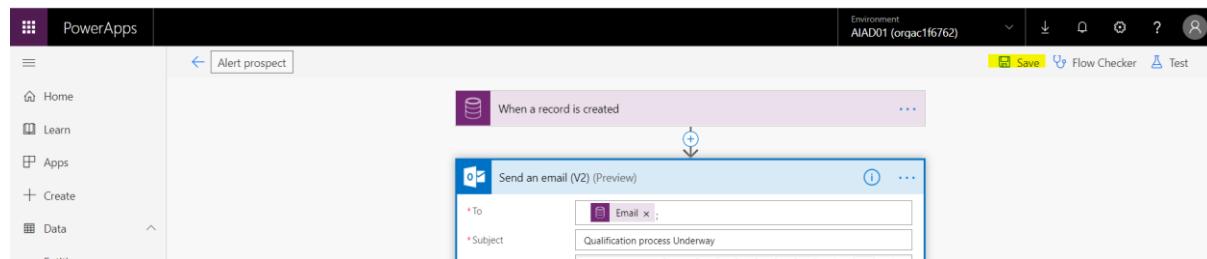
1. To: Email (From Dynamic CDS content)
2. Subject: “Qualification process Underway”

3. Body: "Good Day Firstname (From Dynamic CDS content) Lastname (From Dynamic CDS content)

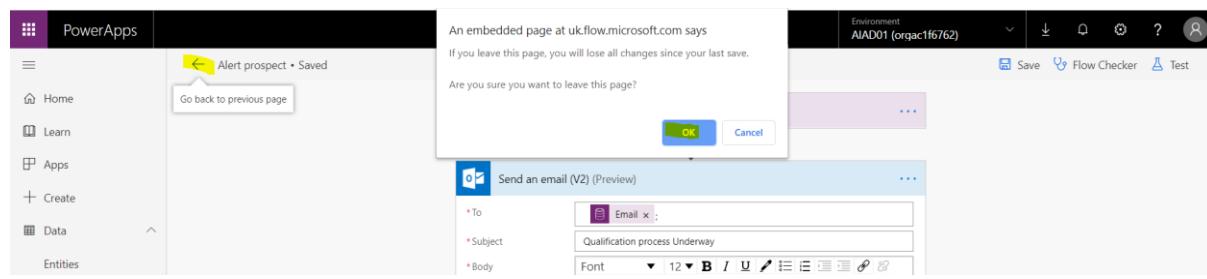
Thank you for sharing your interest in our products and services. We would like to let you know that we are processing your information and will be in touch shortly.
Kindest Regards"



Save your Flow.



Select the back-arrow button on the left of your Flows name and then agree to exit the screen.
PLEASE SAVE before you do this.



You will now see that your Flow has been added to the list of flows within the Flow view.

The screenshot shows the Microsoft PowerApps Flows interface. The left sidebar includes options like Home, Learn, Apps, Create, Data (Entities, Option Sets, Dataflows, Connections), and a search bar. The main area is titled 'Flows' with tabs for 'My flows', 'Team flows', and 'Business process flows'. A single flow named 'Alert prospect' is listed, showing it was modified 57 sec ago and is of type 'Automated'.

Lab 5: Configuring a Basic Power BI Dashboard* (Optional)

In this lab we will learn how to configure a basic Power BI report and Dashboard in order to allow Mid office users the ability to view data in a format that is easy to understand and interactive.

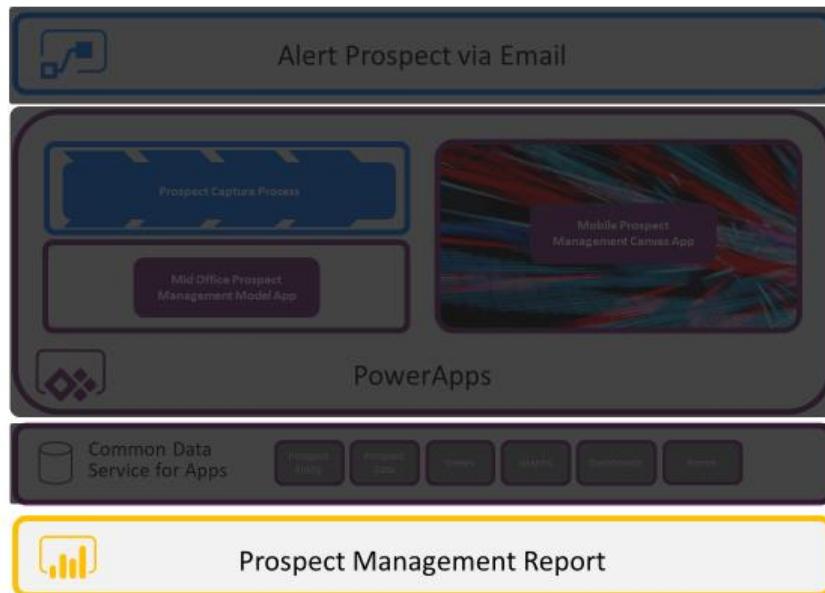
Please Note:

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

This part of the hackathon is totally optional and instead of building this part, you can simply import the “Prospect Management01.Pbix” Power BI file into your environment and connect to it through the Canvas Apps user experience

Solution Components

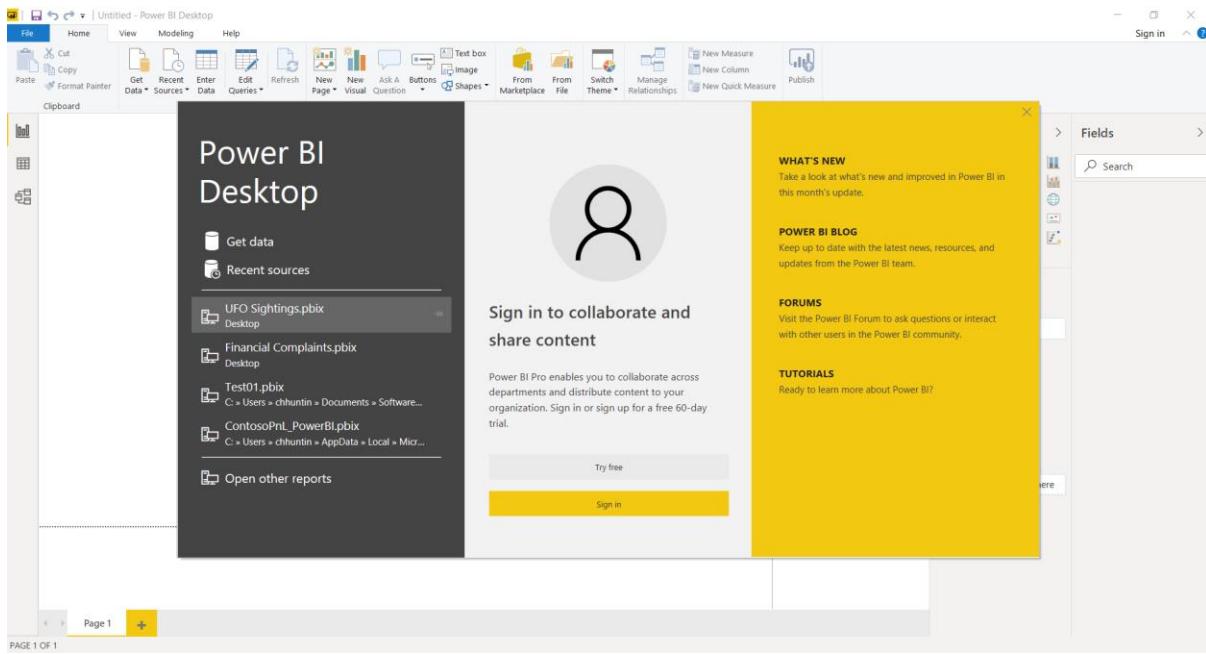
Microsoft Power BI



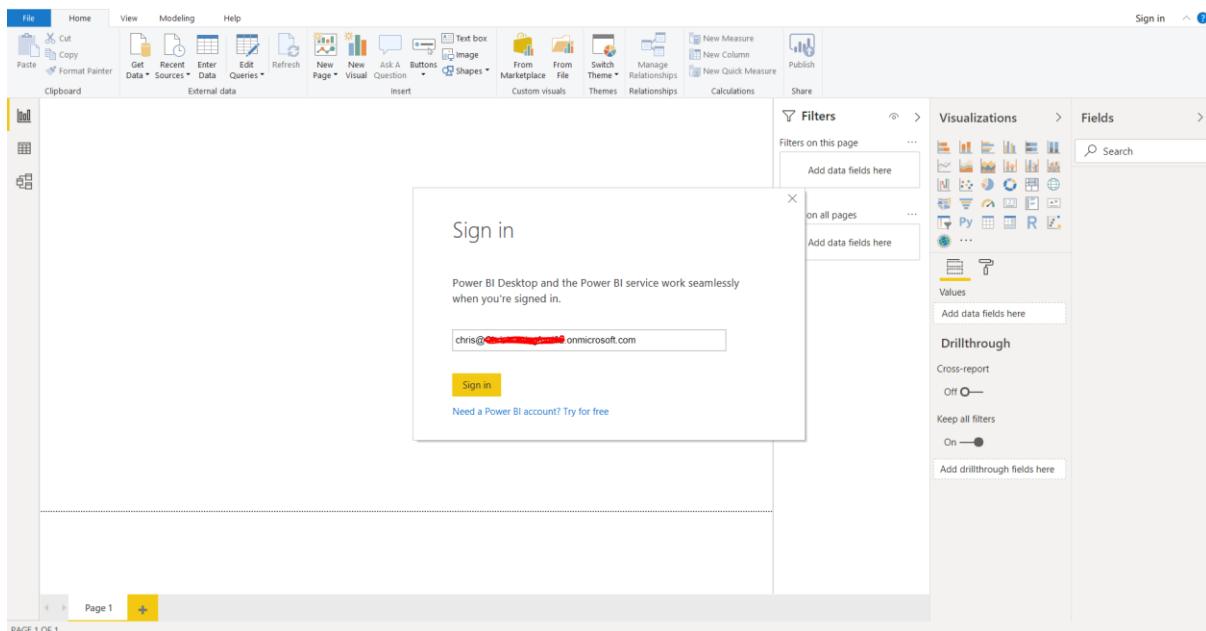
Let's Begin

Power BI Desktop

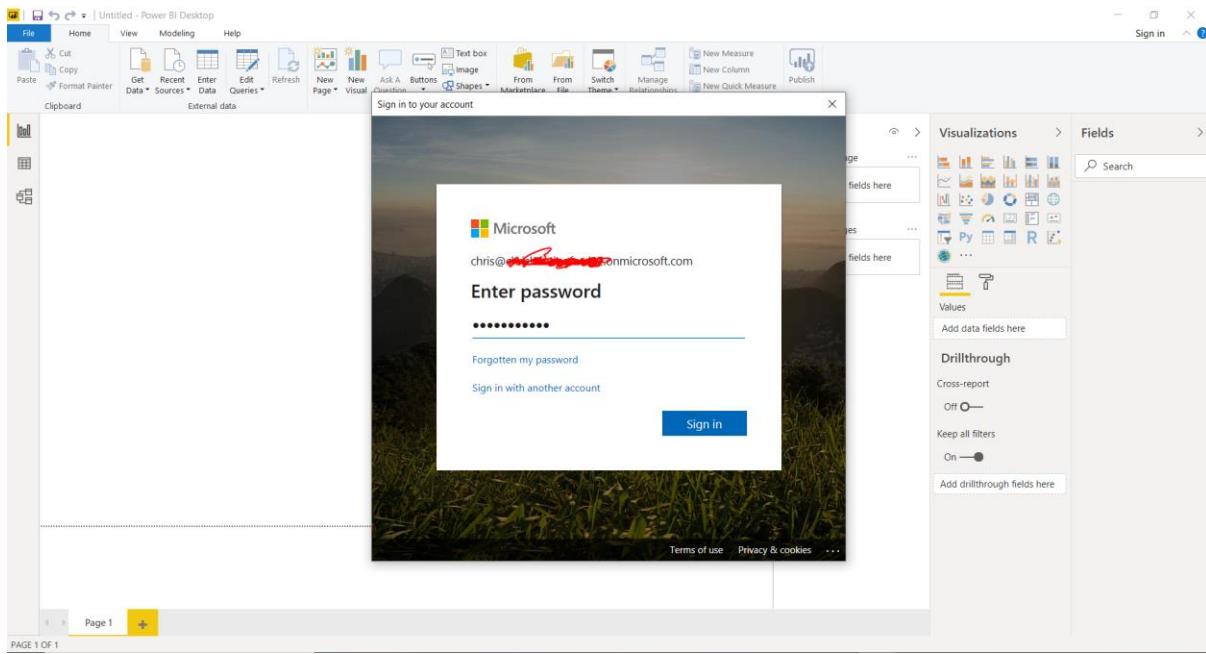
Based on the prerequisites, you should have downloaded Power BI Desktop from the Microsoft App store. Please open this to start with. On arriving on the splash screen select the “Sign In”.



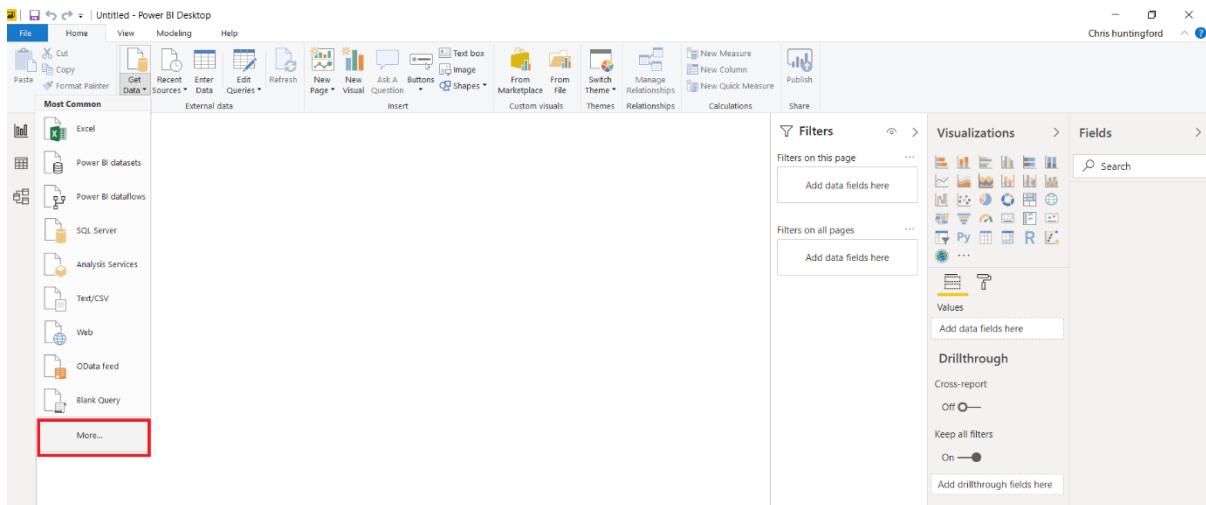
Enter in your trial environments user credentials.



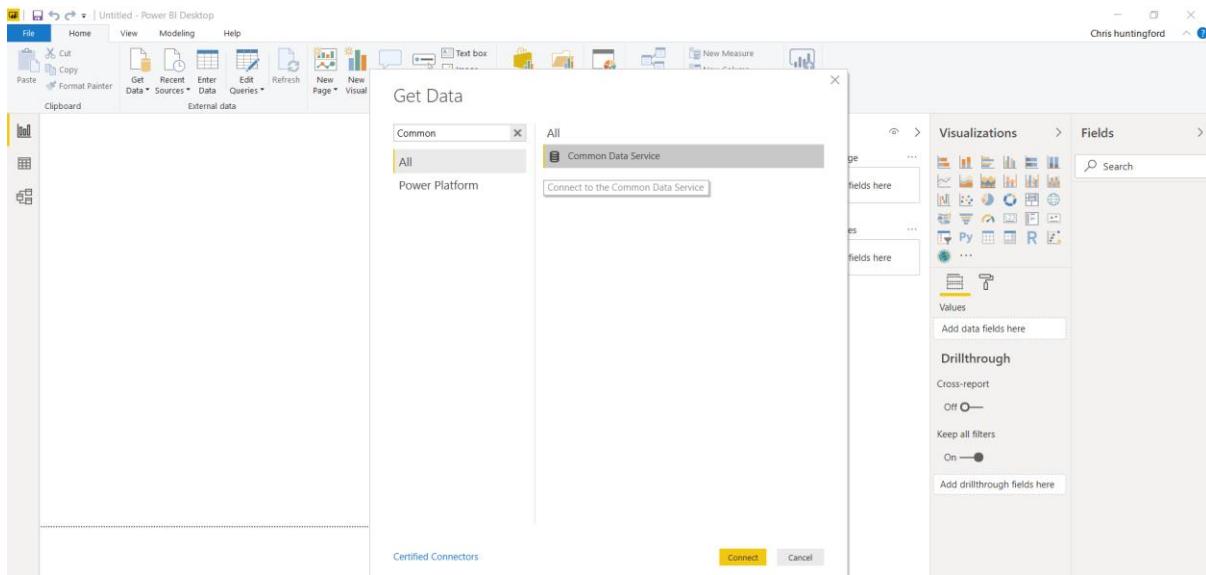
A password screen will appear.



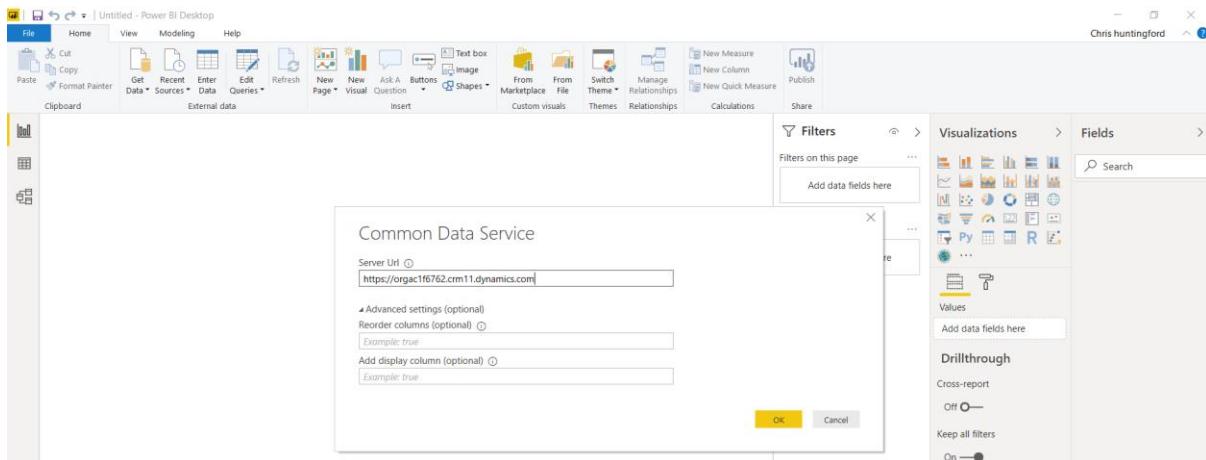
We will now select to get data from the Common Data Service so we can report on this using Power BI. Select “get Data” and then “More”.



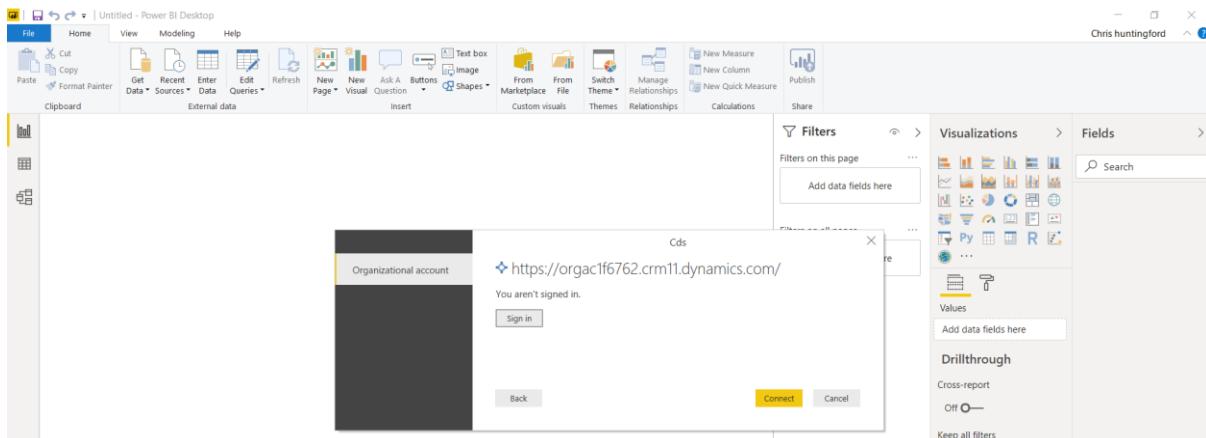
Search for the Common Data Service and then select “Connect” rom the bottom of the page.



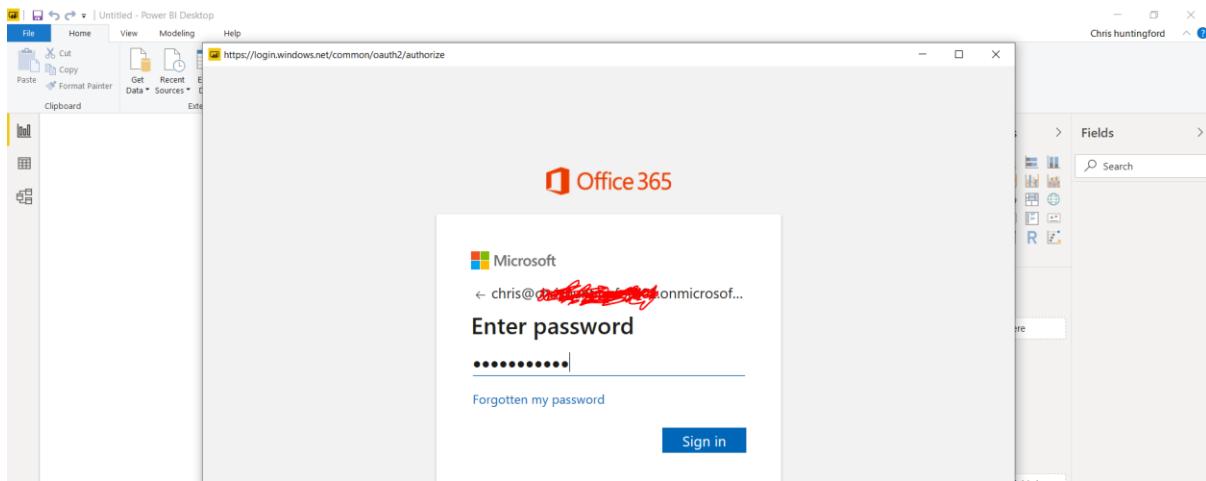
The Common Data Service connection screen requires a server URL to progress getting the data. You should already have this copied into a OneNote page from the [previous section](#), but if not, open up the Prospect Management application you previously created and copy the URL in this format. Enter this into the connection URL and select “OK”.



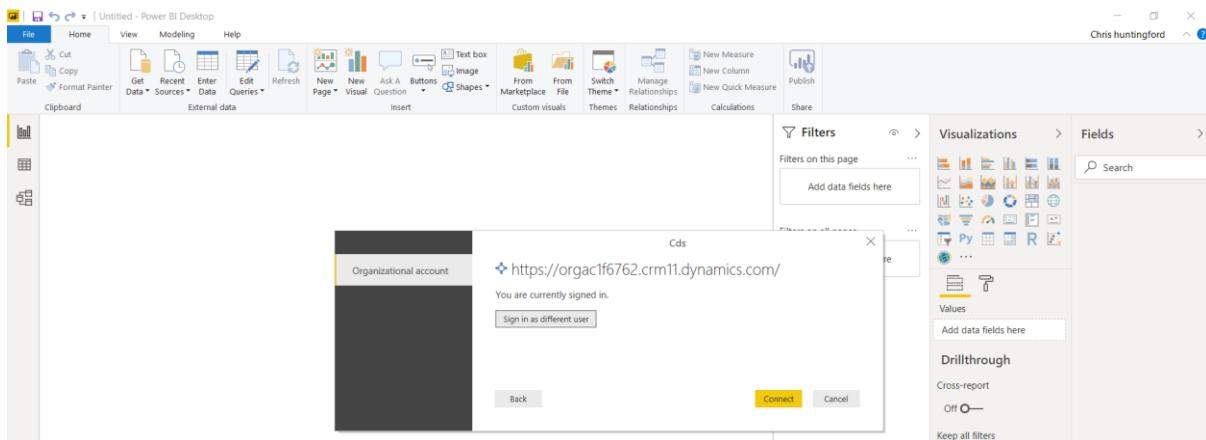
Power BI desktop may ask you to sign in again.



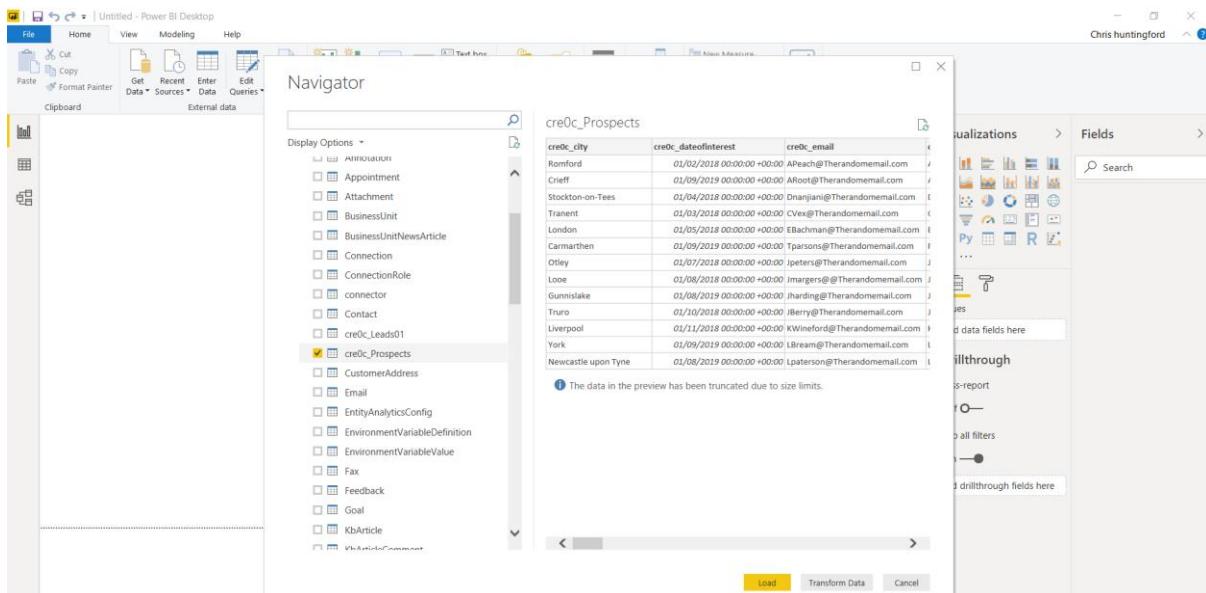
Enter in your username and password and continue.



Once signed in, select “Connect” to continue getting access to the data.



Drill into the Entities list and search for the prospect Entity. Select the relevant entity to preview the data to load to the data model. Select “Transform Data” at the bottom right of the page.



You will be taken to the “power Query” editor where you will now be able to transform the data before it is loaded to the data model. Typically, we only want real data we are going to report on.

The screenshot shows the Power Query Editor interface with a table of data. The columns are labeled: cre0c_city, cre0c_dateofinterest, cre0c_email, cre0c_firstname, and cre0c_lastname. The data includes rows for various locations and names.

Select “Choose columns” from the ribbon to make sure we only select data we need.

The screenshot shows the Power Query Editor with the 'Choose Columns' dialog open. All columns are selected with checkboxes checked.

As a standard , all the columns are selected.

The screenshot shows the Power Query Editor with the 'Choose Columns' dialog open. All columns are deselected with checkboxes unchecked.

Deselect all the columns before we start our column selection.

The screenshot shows the Power Query Editor with the 'Choose Columns' dialog open. Specific columns are selected: cre0c_city, cre0c_dateofinterest, cre0c_email, cre0c_firstname, cre0c_lastname, cre0c_lat, cre0c_long, and cre0c_postcode.

Select the following columns from the List (Please note, the fields in your list will have a prefix that will look some like this: cre0c_field name) :

1. Prefix_City
2. Prefix_DateofInterest
3. Prefix_Prospectid

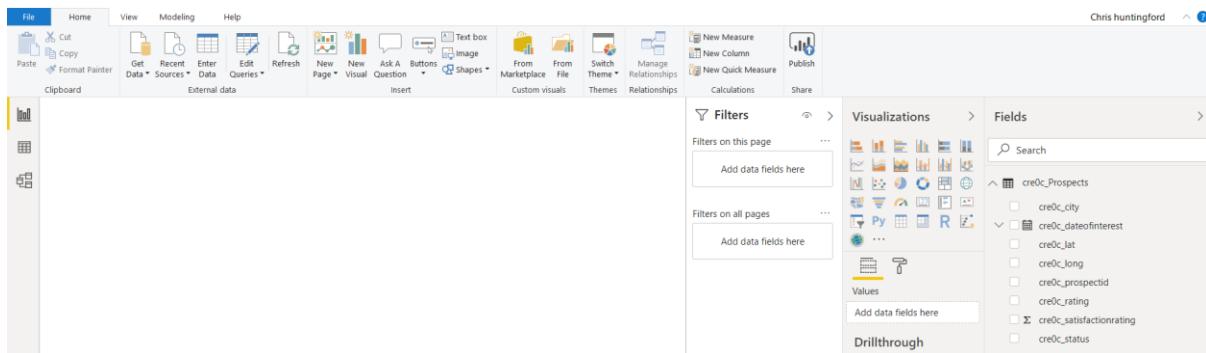
4. Prefix_rating
5. Prefix_satisfactinrating
6. Prefix_status

Once you have chosen the columns, select “Ok”.

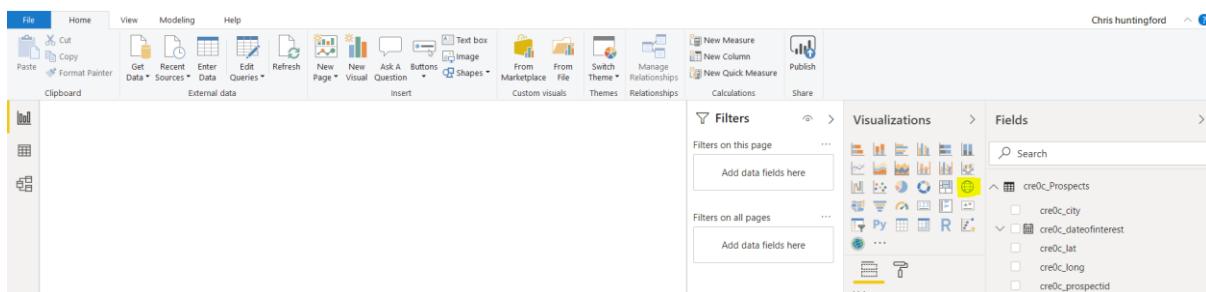
To load the data to the model, select “Close & Apply” from the ribbon.

The data load will be initiated.

Once loaded, you will see your fields visible on the right-hand side.

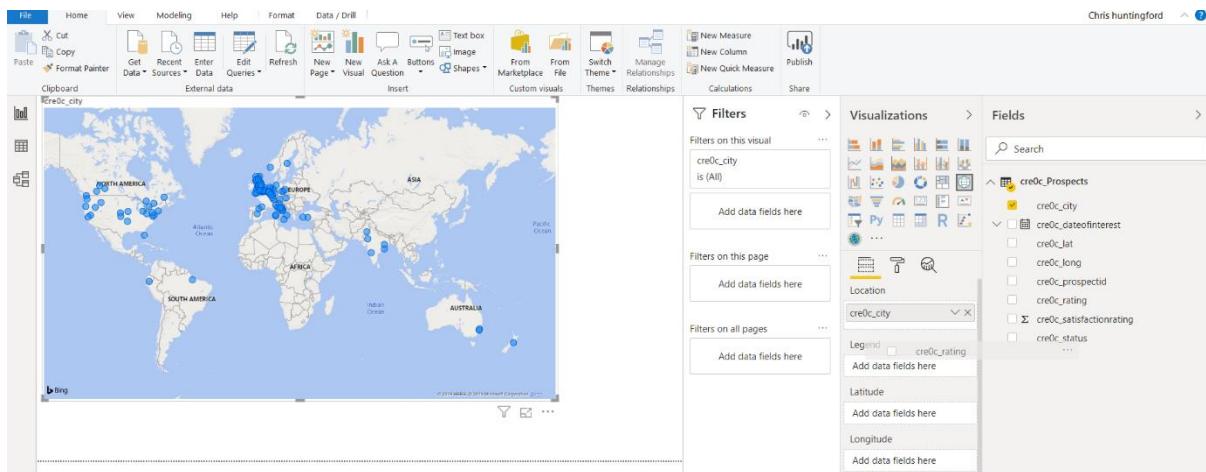


To start creating our visuals, lets start with adding a map to the form. Select the Map component from the visualisation panel on the right.

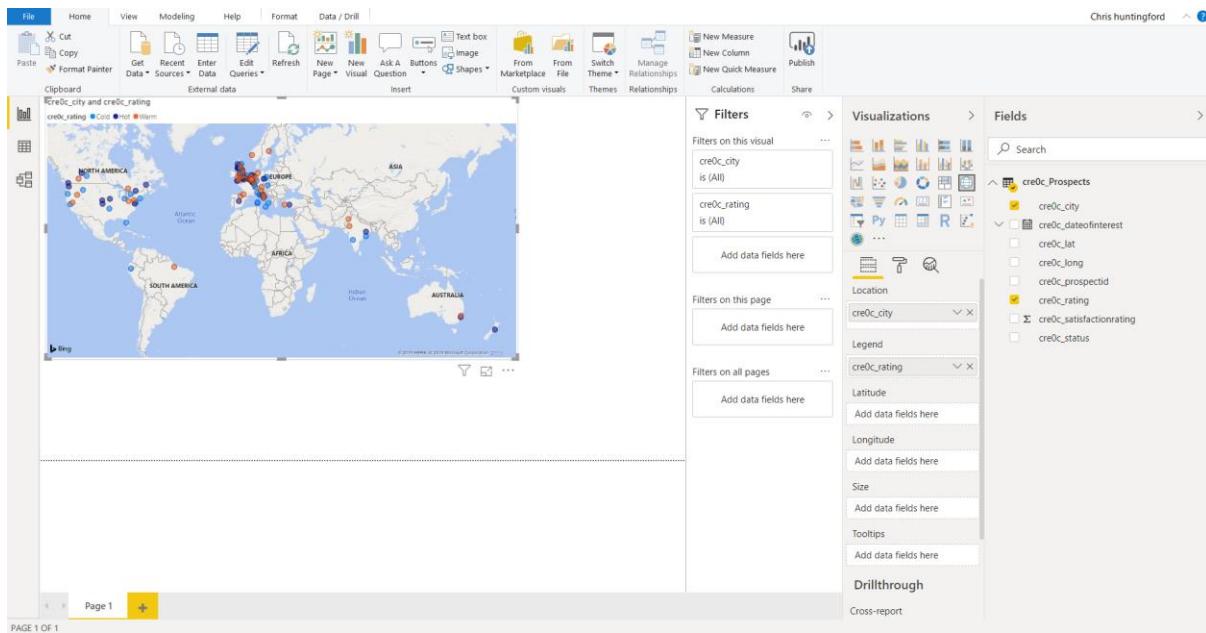


You will see the map visualisation in the main Power BI canvas. Drag and drop the following fields from the Field explorer into the visualisation properties:

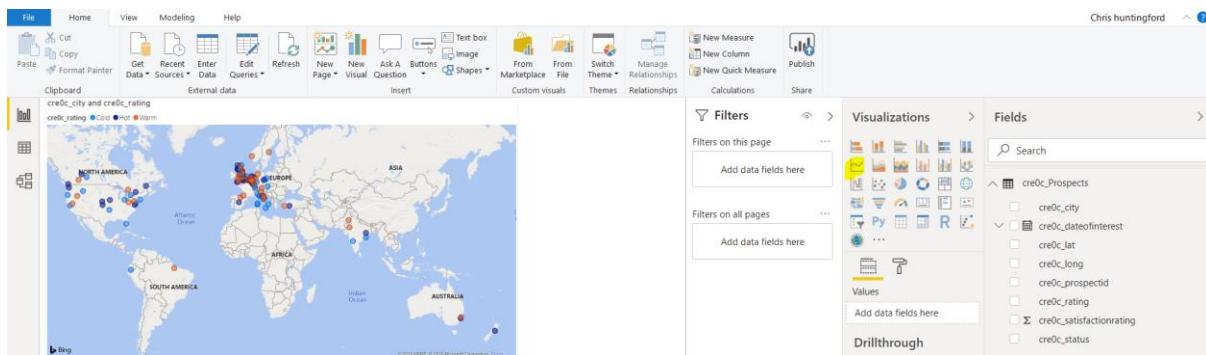
1. Location: Prefix_city
2. Legend: Prefix_rating



Resize your map accordingly until you have something that looks like the below image.

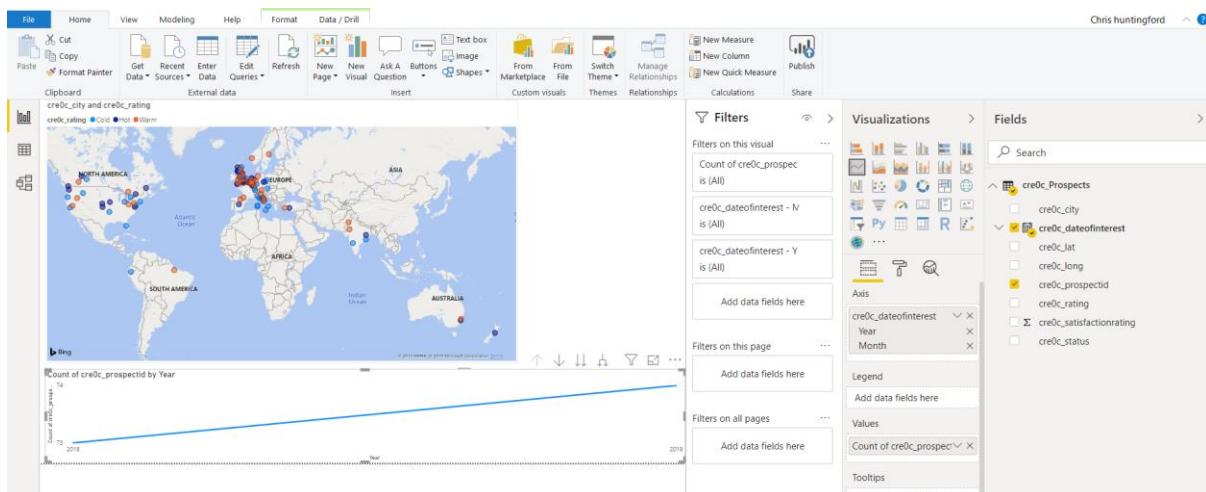


Click OUT of the map and into the blank canvas area. Add in a new Line Chart component from the visualisation menu.

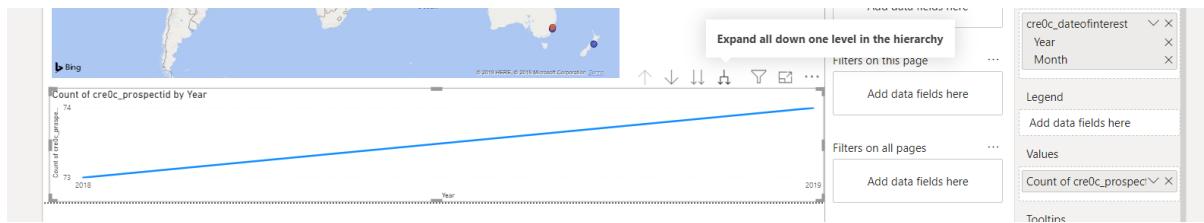


Drag and drop the following fields into the properties of the line chart visualisation:

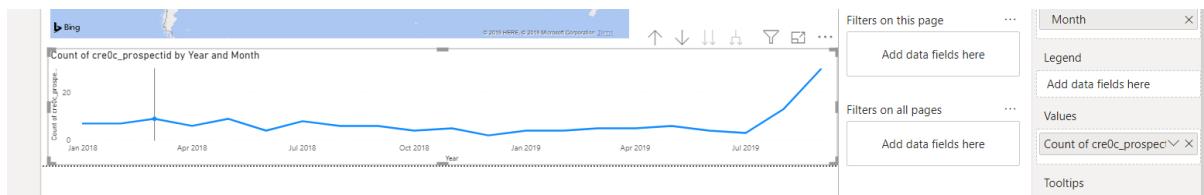
1. Axis: prefix_Dateofinterest (Remove Quarter & month options).
2. Values: prefix_prospectid (This will automatically insert “Count of” in front)



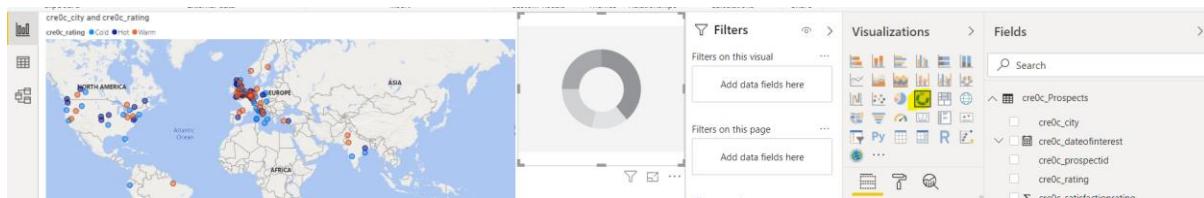
To further create more detail in the Line Chart, select the “Expand Down 1 Level in the Hierarchy” Button on the line chart visual.



The result will look like this. Make sure you resize your visual accordingly.



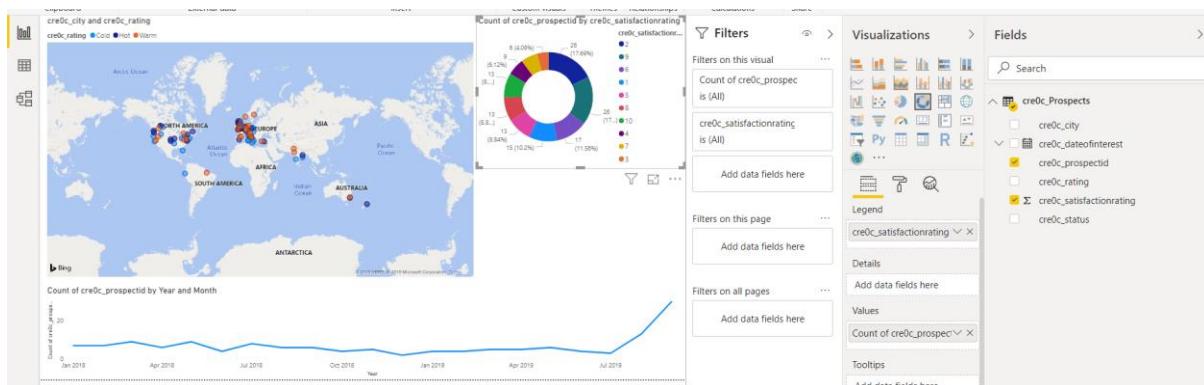
Click out of the visual and onto a clean area of the canvas. Add a doughnut visual to the report.



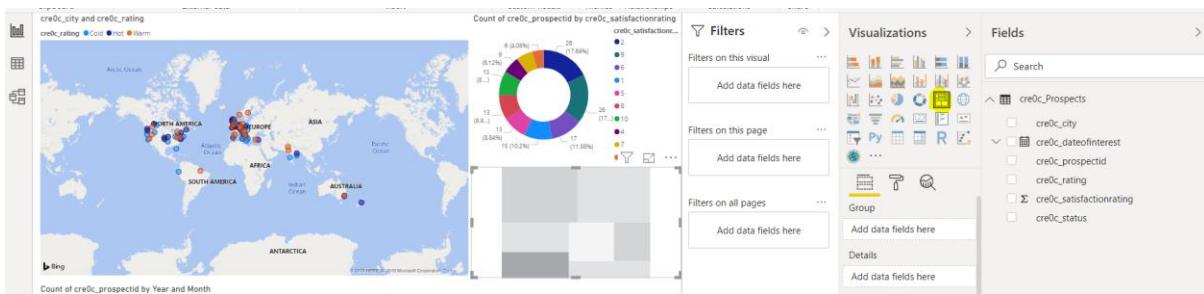
Drag the following fields into the properties of the doughnut chart:

1. Legend: prefix_Satisfactionrating
2. Values: prefix_prospectid ("Count of" will automatically be added in front of it)

Resize elements as required.



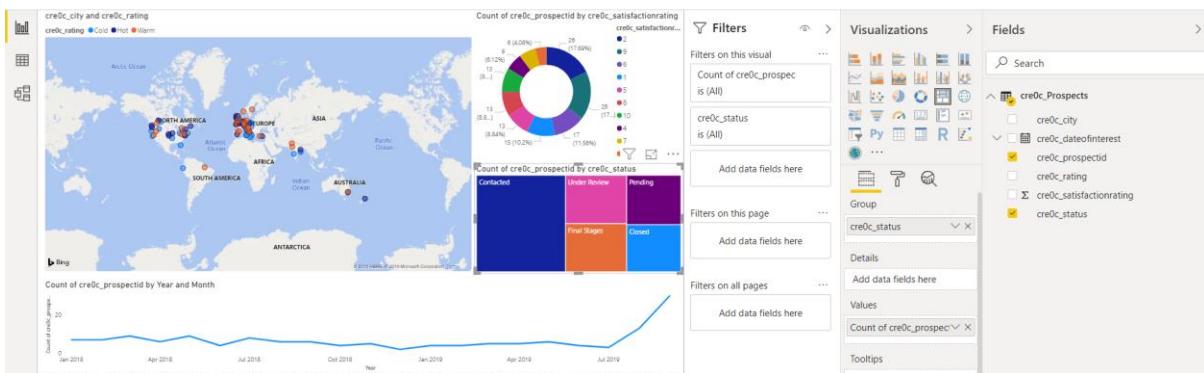
Finally, click out of the doughnut chart visual anywhere on the Blank Canvas and add a Tree map component from the visualisation pane.



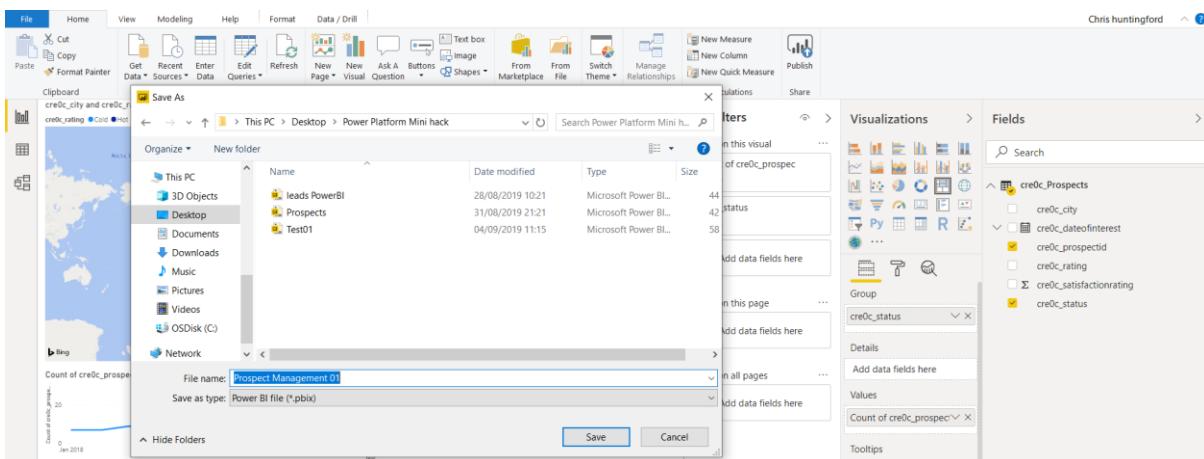
Drag the following fields into the properties of the doughnut chart:

1. Legend: prefix_status
2. Values: prefix_prospectid ("Count of" will automatically be added in front of it)

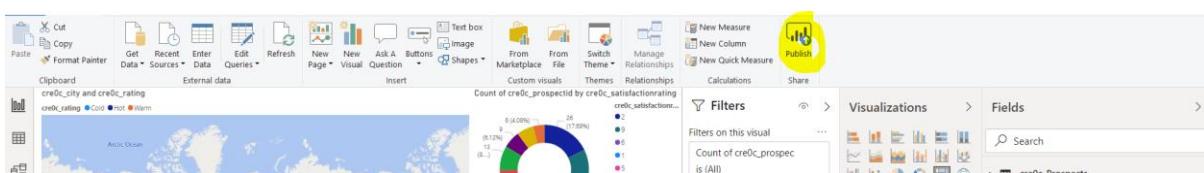
Resize elements as required.



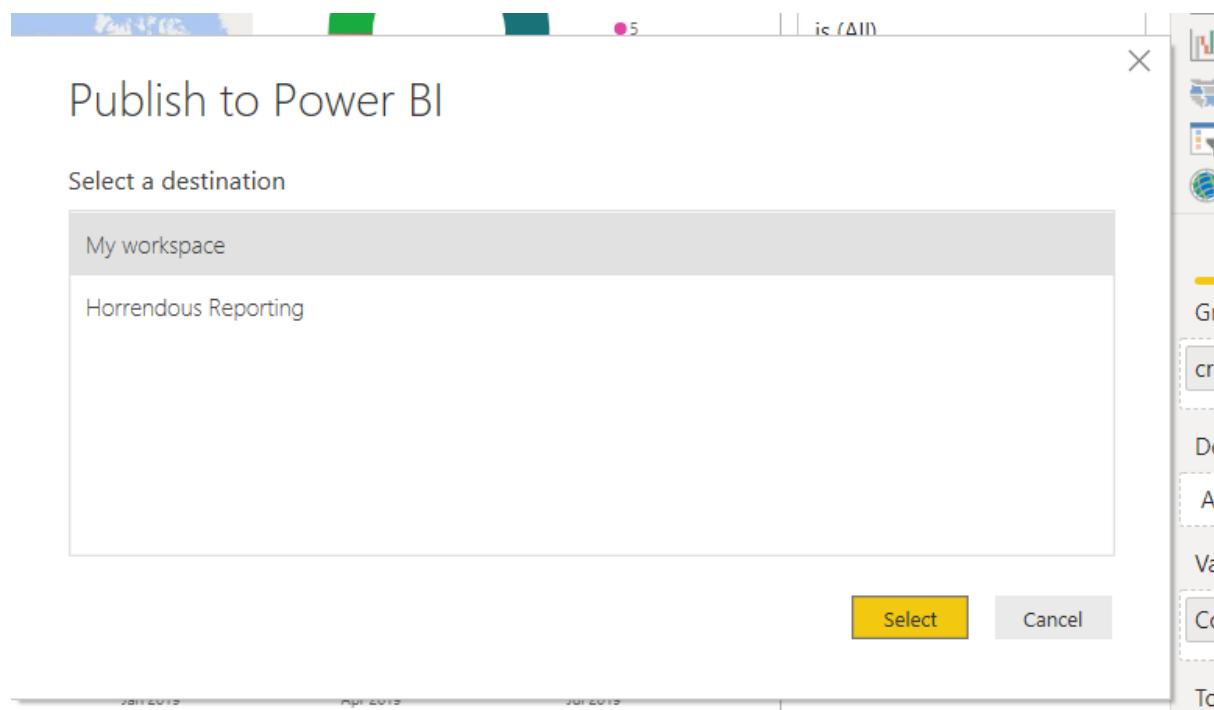
You are now ready to save and publish your amazing report to your power BI workspace. Elect “File | Save As” and save your *.Pbix file somewhere on your local machine.



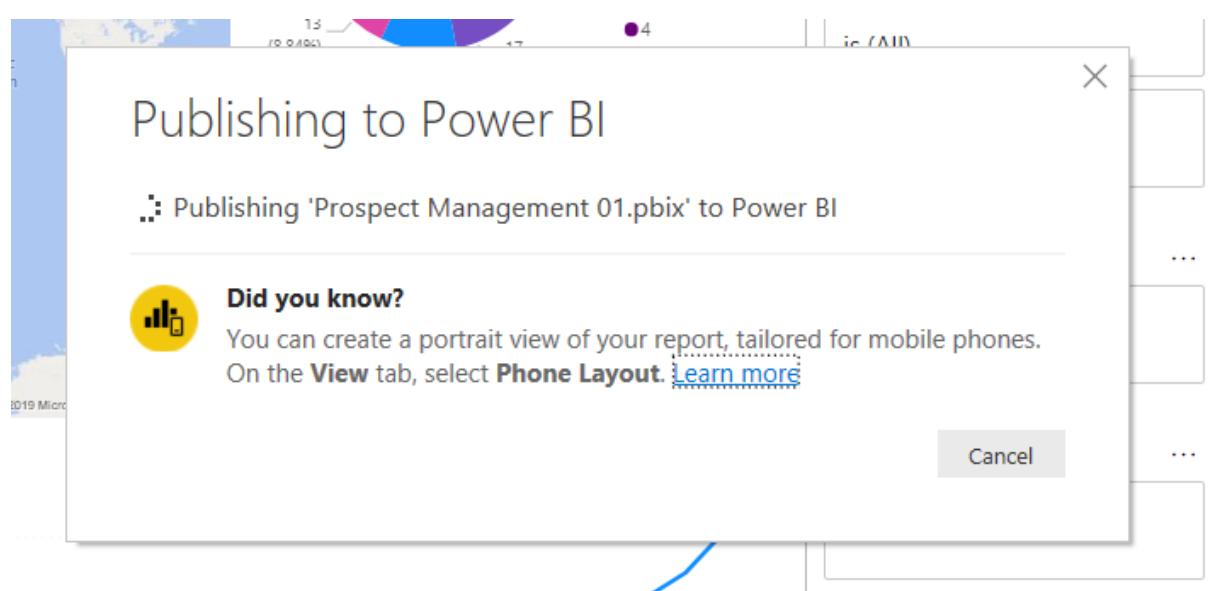
Publish to your workspace by clicking the “Publish” button in the ribbon.



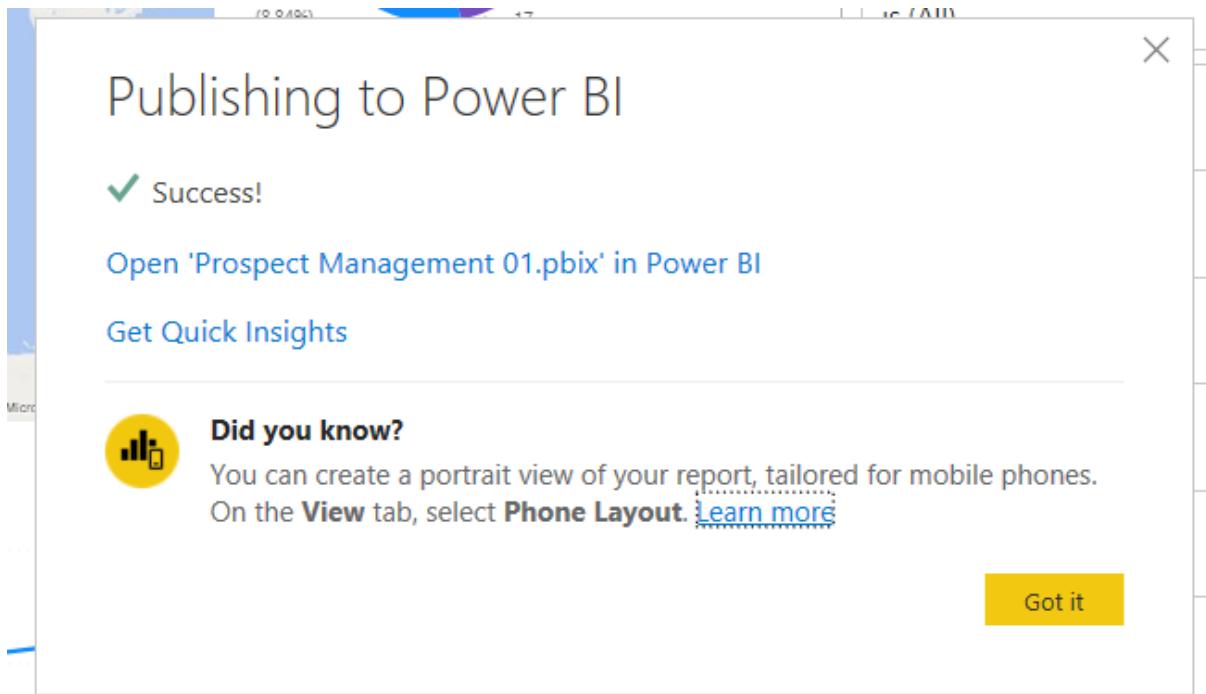
Select the workspace you would like to publish to.



Your report will now be published to your workspace.



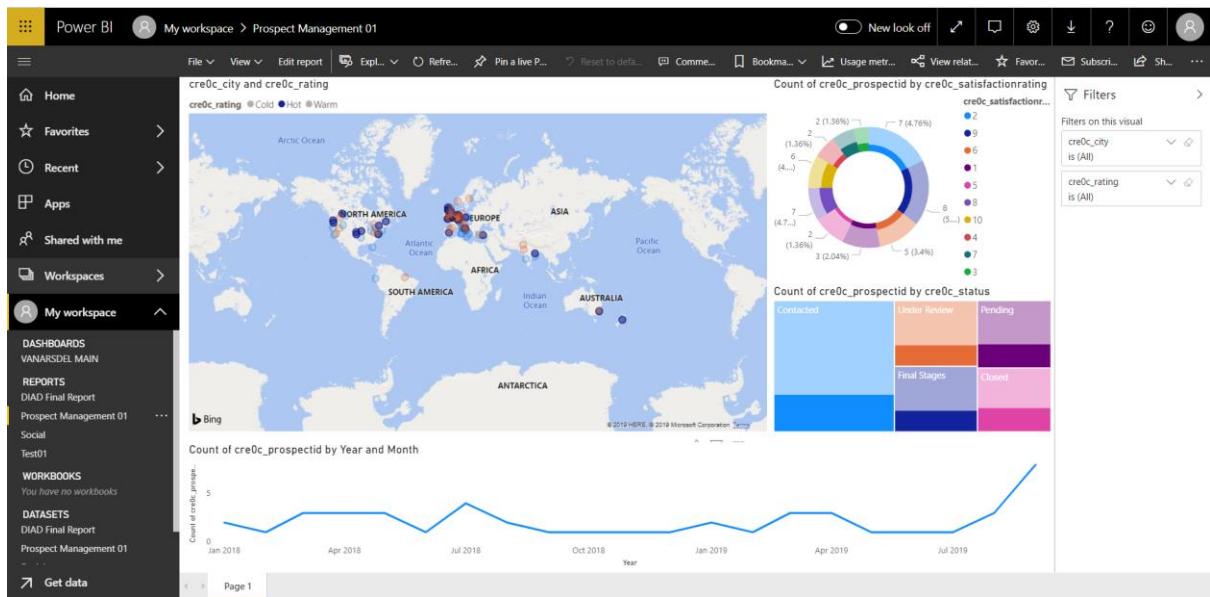
Once this is complete you will be notified.



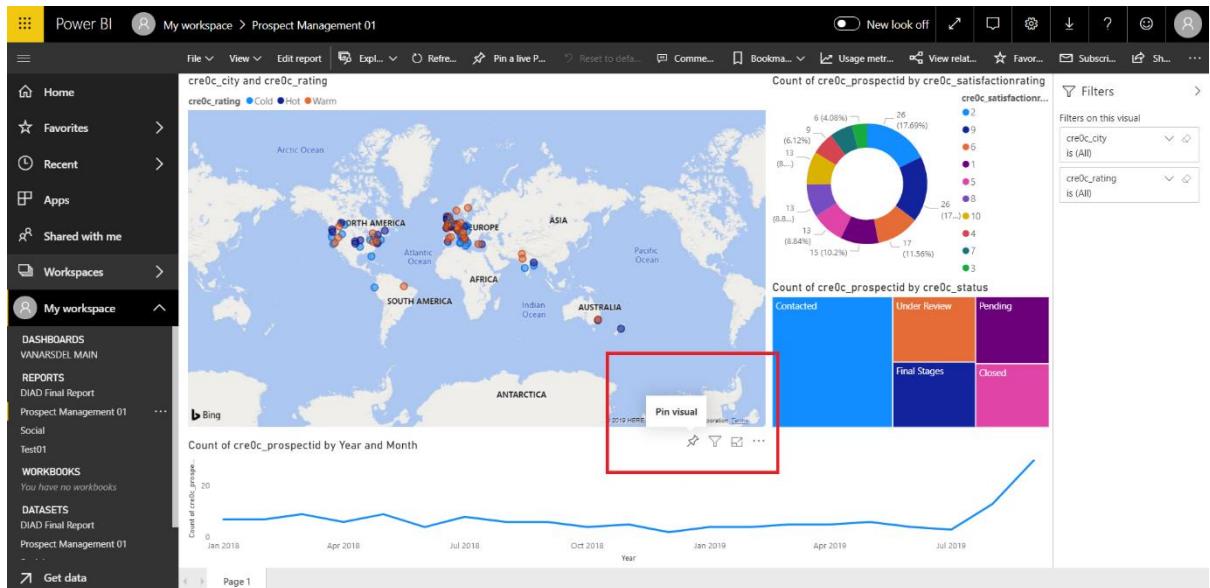
Open a browser window and make sure you are signed into Power BI. Navigate to the Power BI Home page (<https://app.powerbi.com/home>) and look for the report you just uploaded.

A screenshot of the Power BI Home page. The left sidebar shows navigation options like Home, Favorites, Recent, Apps, Shared with me, Workspaces, My workspace, DASHBOARDS, REPORTS, and WORKBOOKS. Under WORKBOOKS, "Prospect Management 01" is listed. The main area displays a "Good afternoon, Chris" greeting and a "Favorites + frequent" section with tiles for "DIAD Final Report" (Report), "VANARSDDEL MAIN" (Dashboard), "My workspace" (Workspace), "The Most Impressive Power BI EVER" (Report), "The Worst Reports EVER" (Dashboard), "Test01" (Report), and "Horrendous Reporting" (Workspace). Below this is a "Recents" section with tiles for "DIAD Final Report" (Report), "The Worst Reports EVER" (Dashboard), "The Most Impressive Power BI Report EVER" (Report), and "Horrendous Reporting" (Workspace). At the bottom, there's a "Workspaces" section with two icons.

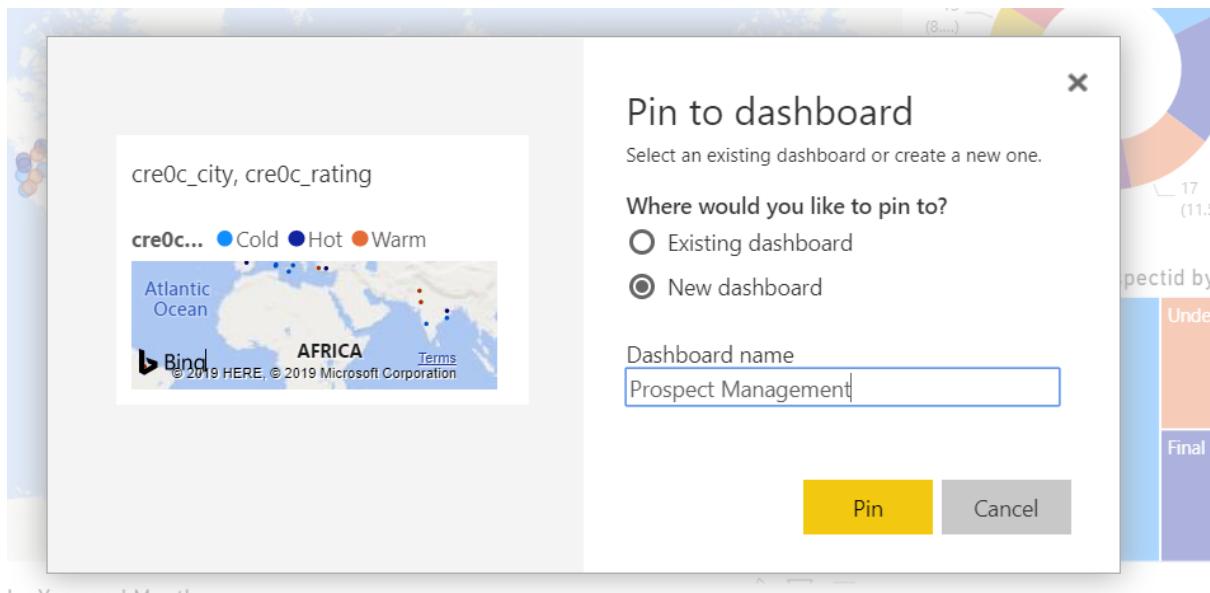
On clicking on it you will be able to interact with the visuals. Here is an example of all the hot prospects in my database over time.



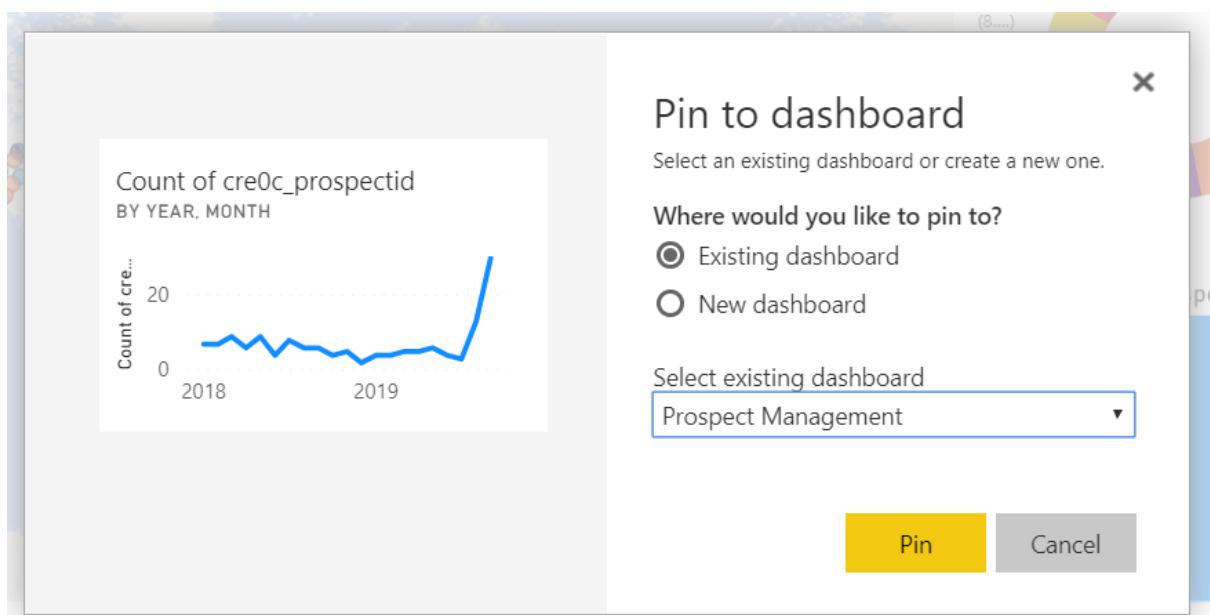
To add a visual to a dashboard, hover over it in the report and select the “Pin Visual” option.



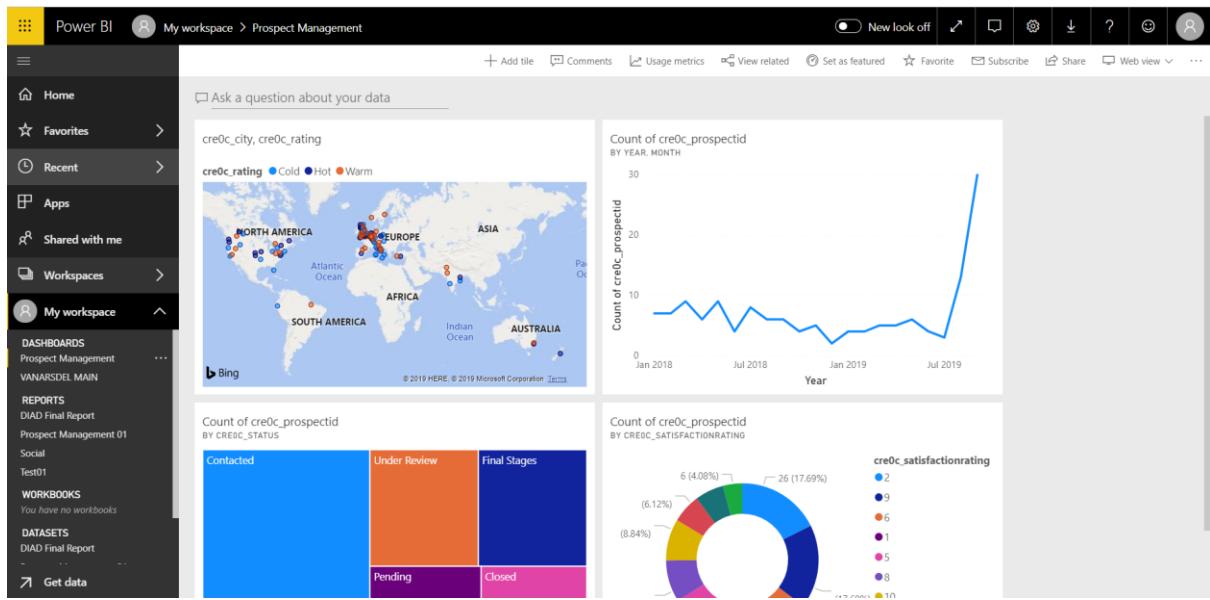
Create a new Dashboard called “Prospect Management”.



Go ahead and pin other visuals from the page onto this dashboard.



Look at the Dashboards on the left-hand side of the page and select the “Prospect Management” Dashboard. The fact that these visuals are now available in a dashboard makes them available to be used within Model-driven apps and Canvas apps.



Lab 6: Configuring the Sales Canvas App*

In this lab we will learn how to configure a basic PowerApps (Canvas App) that the Sales team can use on the road to capture information for the Mid office prospect management team to leverage. This app needs to be as simple and user friendly as possible.

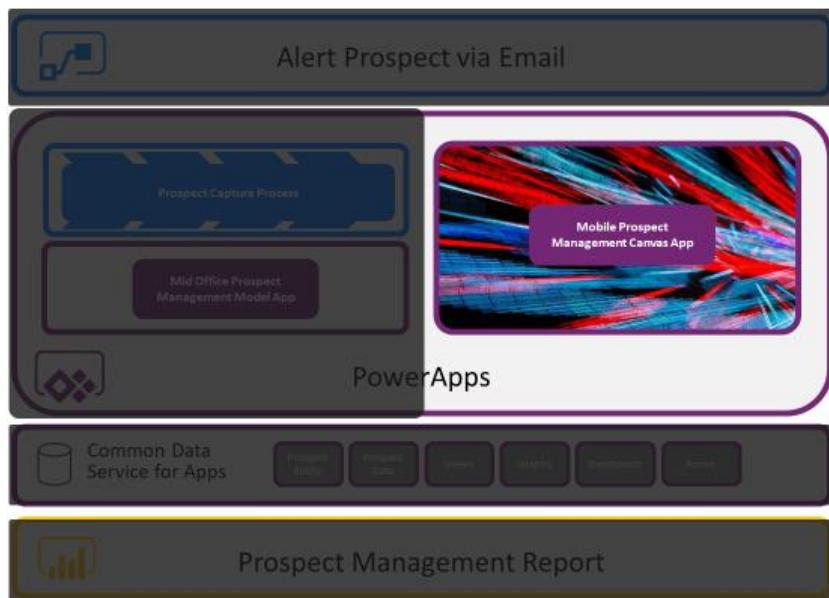
Please Note:

This lab can be completed independently, with only Lab 1 being and no support of the other labs.
This does not include the embedded Power BI section of the Solution. If you would like to complete this without creating the actual Power BI report, you are able to import the “Prospect Management 01.Pbix report” into power BI and reference the relevant workspace.

Solution Components

PowerApps : Canvas Apps

Power BI (Optional)



Let's Begin

PowerApps Canvas App

Navigate to the maker Experience (Make.PowerApps.com) and then to the Apps section from the menu on the left-hand side of the page. You will be able to see your “Prospect Management” model driven application the list.

Name	Modified	Owner	Type
Prospect Management	2 h ago	Chris huntingford	Model-driven
Solution Health Hub	1 wk ago	SYSTEM	Model-driven

Select “Create an app” from the menu at the top and then select “Canvas App”.

The screenshot shows the PowerApps home page. On the left, there's a navigation bar with 'Home', 'Learn', and 'Apps'. Under 'Apps', there are 'Create', 'Data', 'Entities', and 'Option Sets'. The main area has a header with '+ Create an app', 'Edit', 'Play', 'Share', and 'Delete'. A dropdown menu is open under '+ Create an app', showing 'Canvas' (highlighted in yellow), 'Model-driven', and 'Portal (preview)'. Below this, there's a table listing apps: 'Prospect Management' (selected, last modified 2 hours ago) and 'Solution Health Hub' (last modified 1 week ago). The table has columns for 'Name', 'Modified', and a 'More' button.

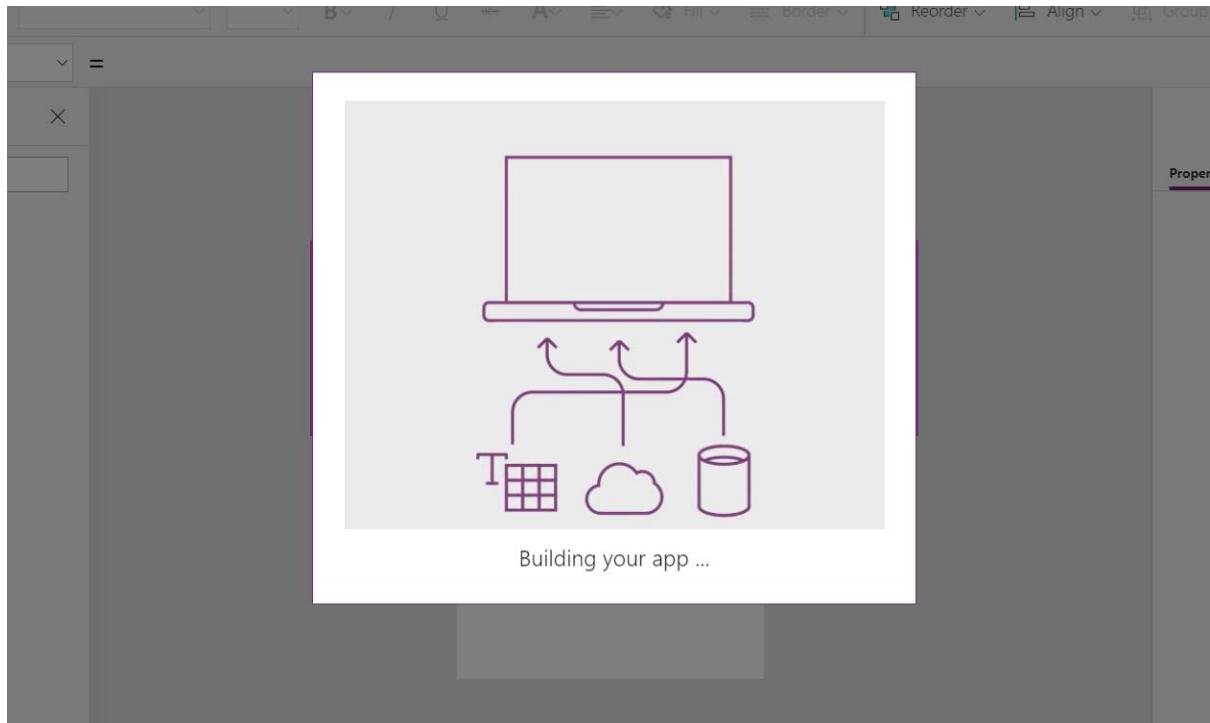
You will be taken to the “Create an App” page where you will be given the options to start with data or from blank. In this scenario we have some Prospect data in the CDS, so select “Common Data Service, Phone layout”.

The screenshot shows the 'Create an app' page. On the left, there's a sidebar with 'New', 'Open', 'Account', 'Connections', and 'Flows'. The main area has a title 'Create an app in AIAD01 (orgac1f6762)' and a section 'Start with your data'. It shows four options: 'Common Data Service' (highlighted in yellow), 'SharePoint', 'OneDrive for Business', and 'SQL Server'. Each option has a 'Phone layout' button below it. Below this, there's a section 'Start with a blank canvas or a template' showing three template cards. The top right corner shows the environment 'AIAD01 (orgac1f6762)'.

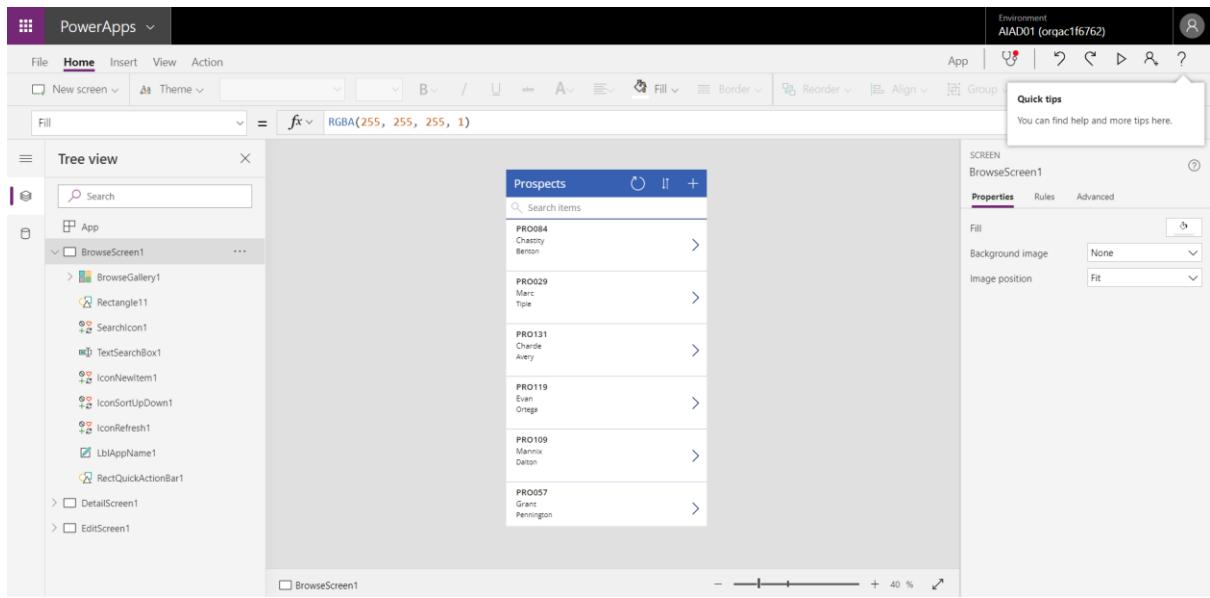
Search for and select “Prospects” from within your list of Common Data Service entities and then select the “Connect” button on the bottom right of the page.

The screenshot shows the 'Connections' page. On the left, there's a sidebar with 'New', 'Open', 'Account', 'Connections', and 'Flows'. The main area shows a connection named 'Chris@ChrisHuntingford02.onmicrosoft.com' under 'Common Data Service'. To the right, there's a 'Default' connection named 'Prospect Management'. A search bar at the top right contains 'Pros'. At the bottom right, there's a 'Connect' button.

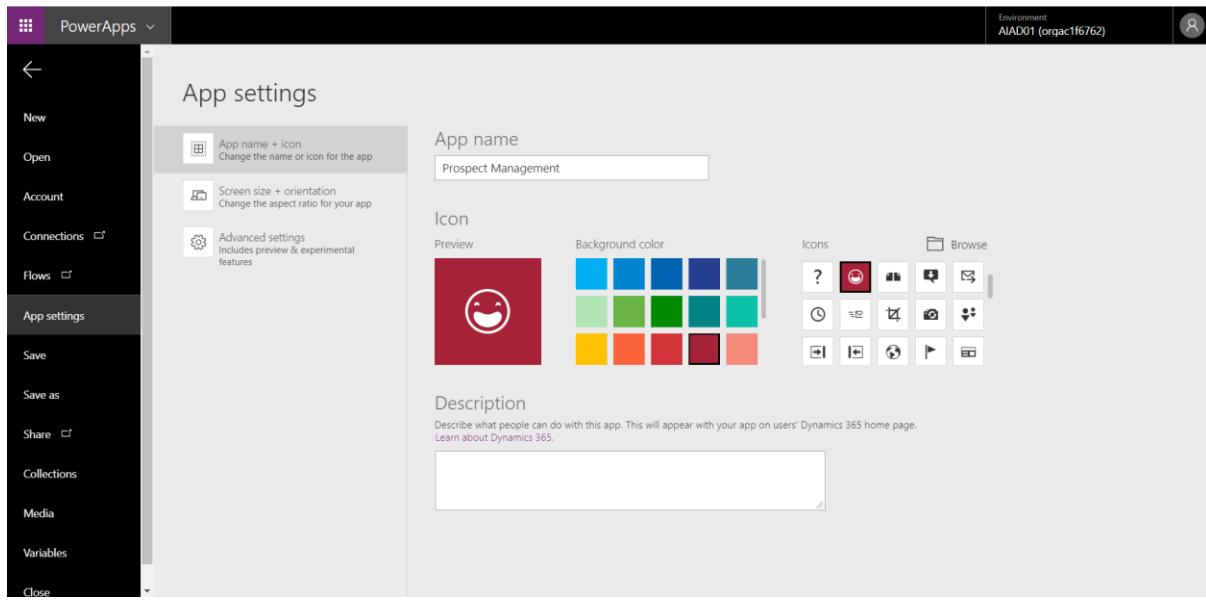
Once the connection is made the PowerApps will leverage the core application templates that it contains for the Common Data Service and generate a base application for you to leverage. This should take around a minute.



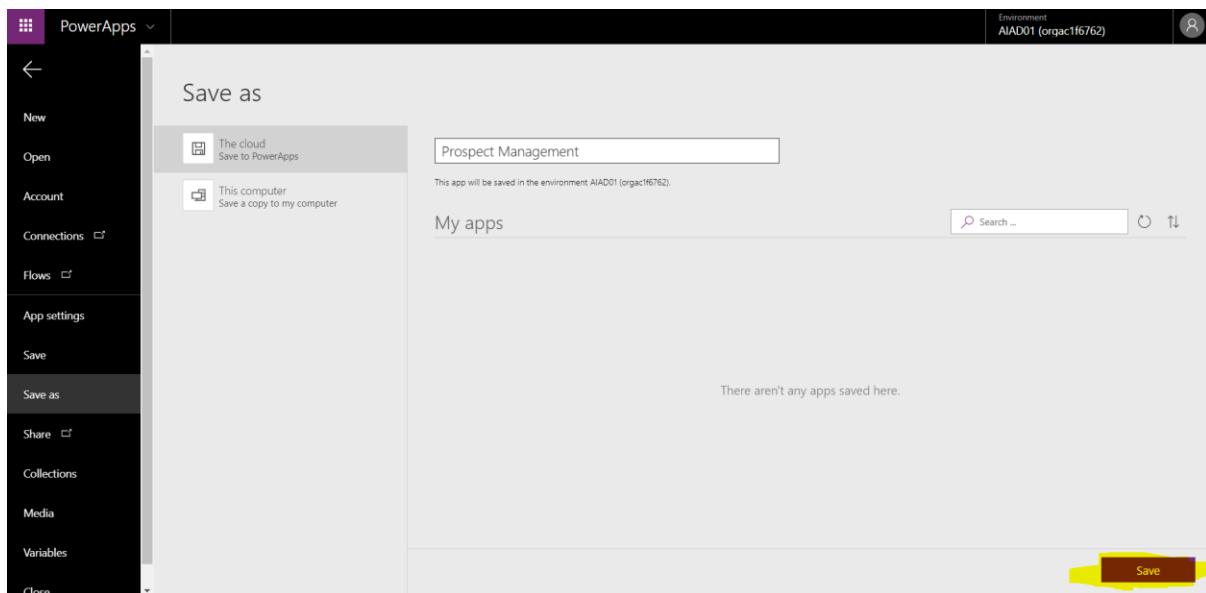
Once the app creation process is finished you will have the base structure that you can extend to create a Canvas app ready for the sales team to capture and manage prospects.



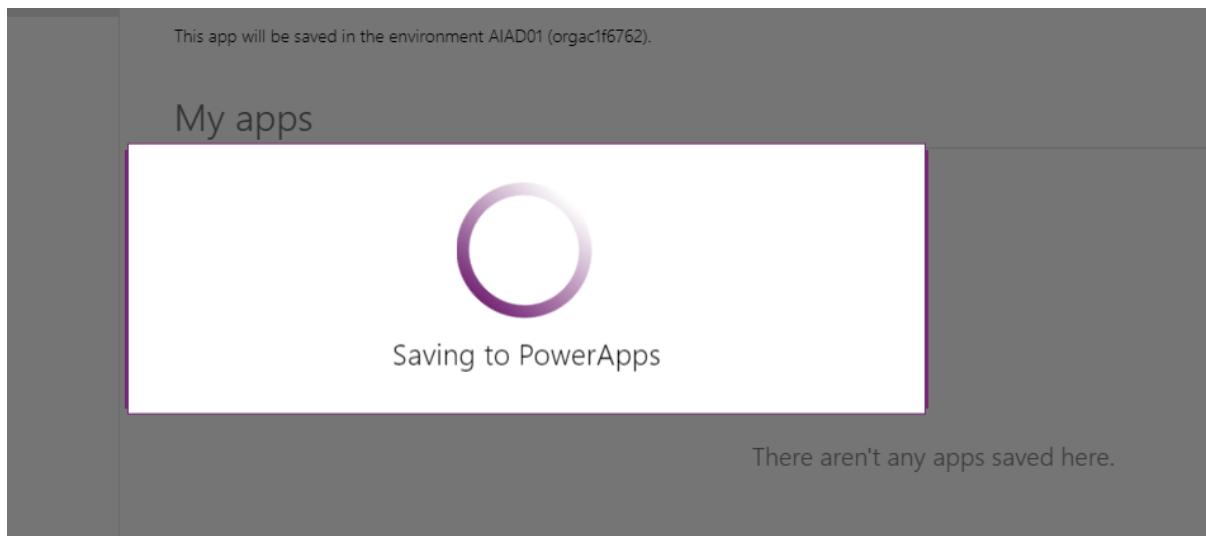
Before making any changes, navigate to the File menu and select “App Settings”. Give your app a title, and Icon and find a suitable colour.



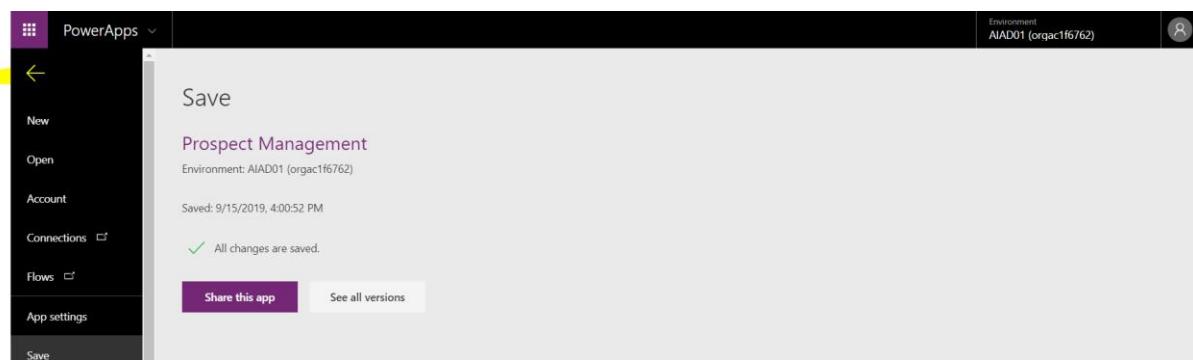
Once you have done this, Select SAVE from the menu on the left and then click the “Save” button on the bottom right hand corner of the page.



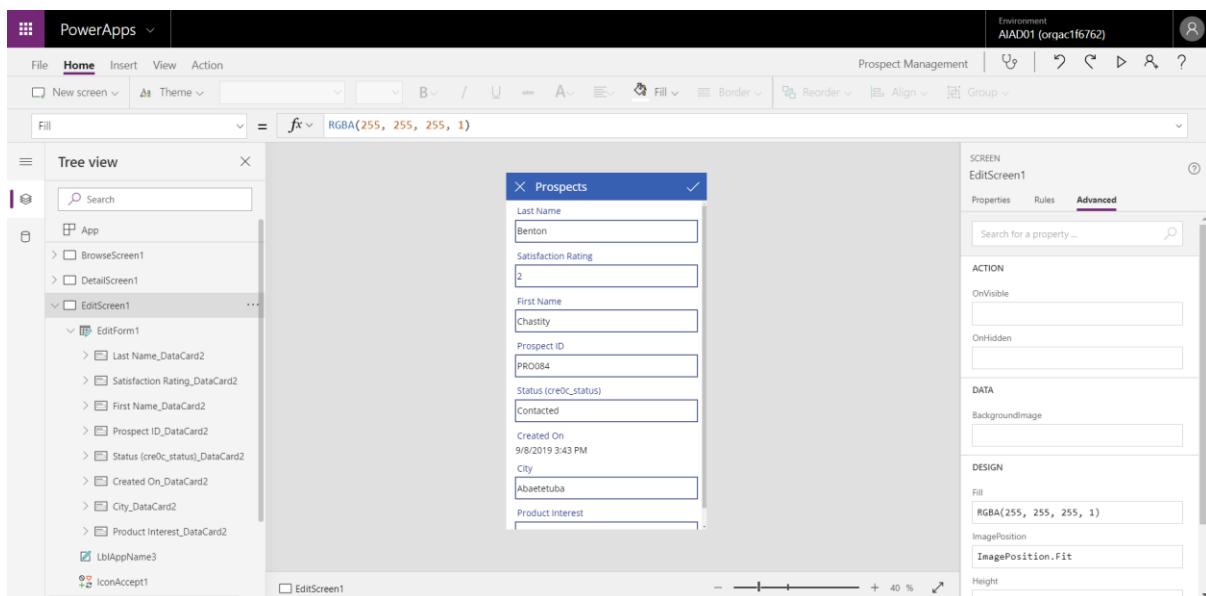
Your application will now be saved and will be made available for sharing.



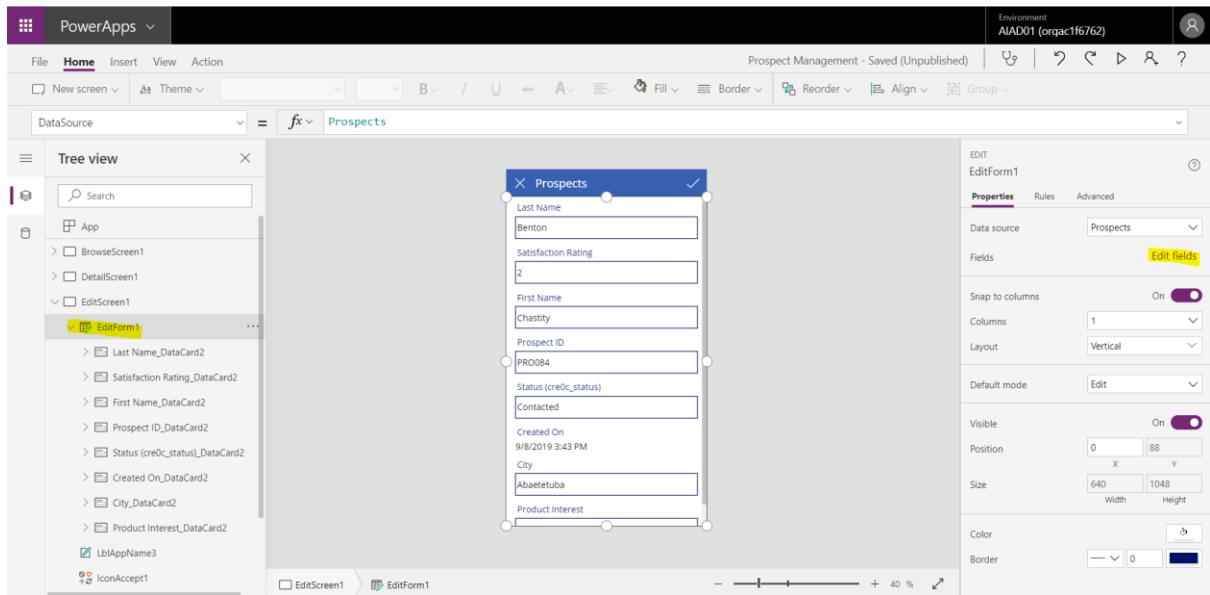
Select the back arrow to go back to editing your Canvas app.



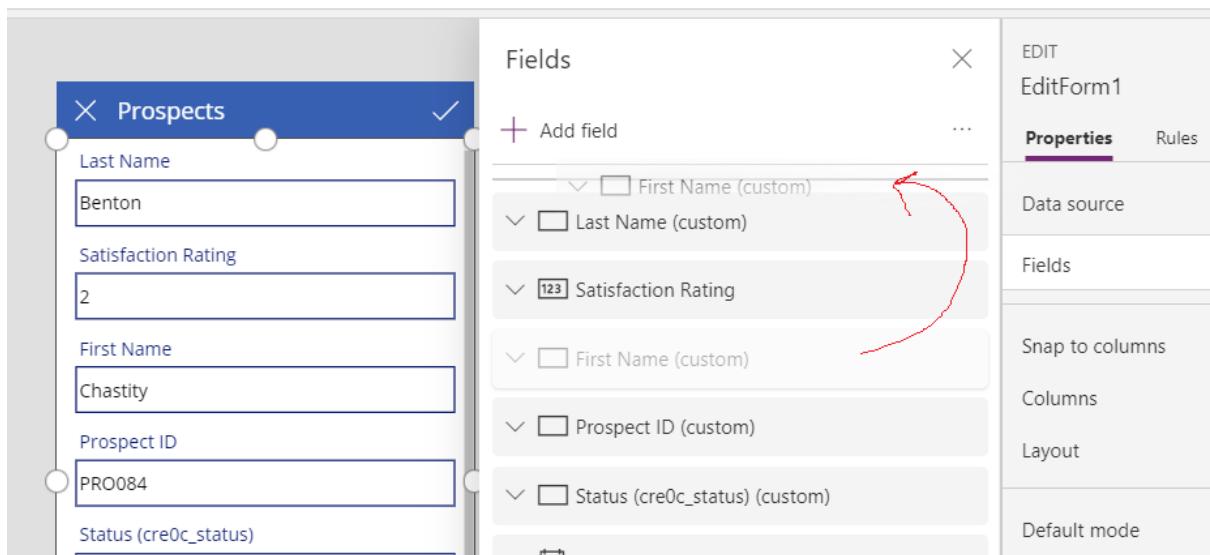
Before we change of the user Interface (UI) elements we need to make sure that all the relevant fields are available on the Capture form. Navigate to the EditScreen from the Treeview on the left.



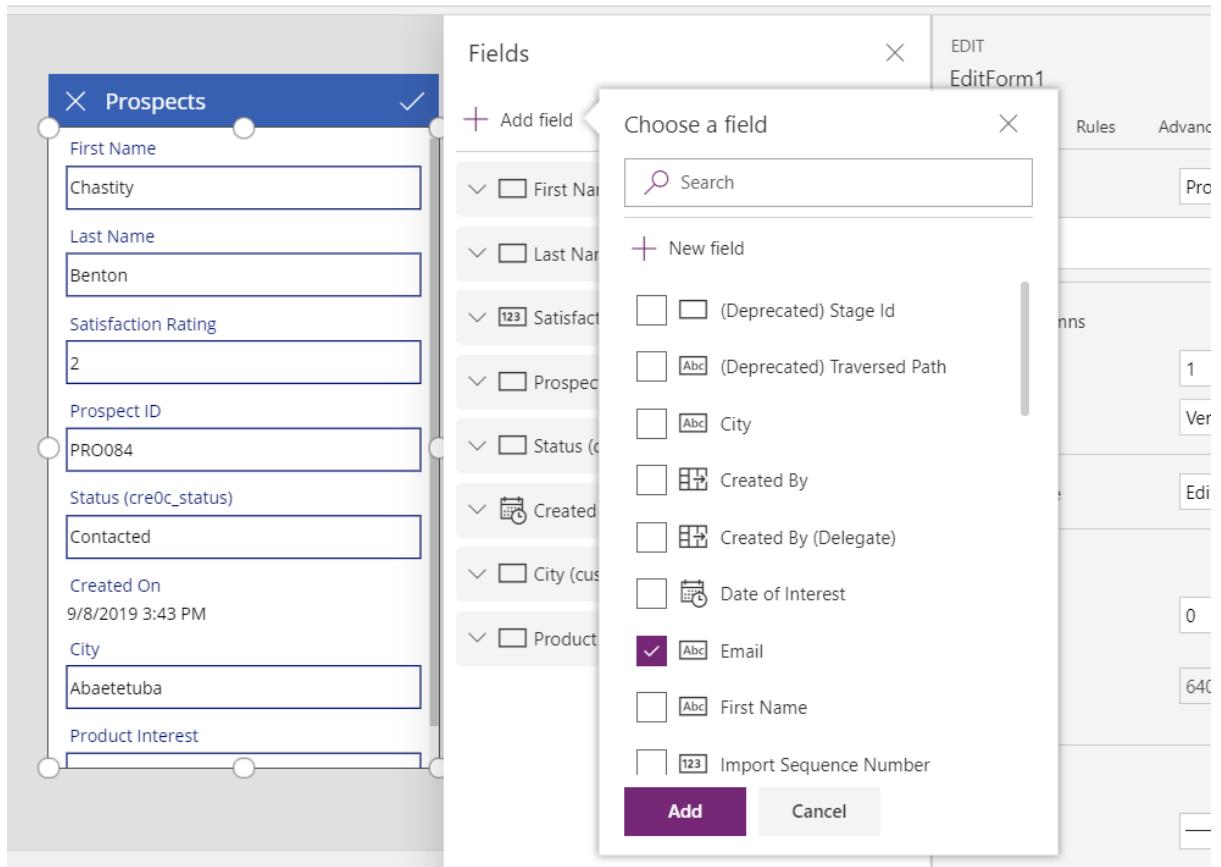
You will see that there are various fields that have automatically been added to the form. On the left select the "EditForm1" component from the Tree view. Click the "Edit Fields" option from the properties panel on the right.



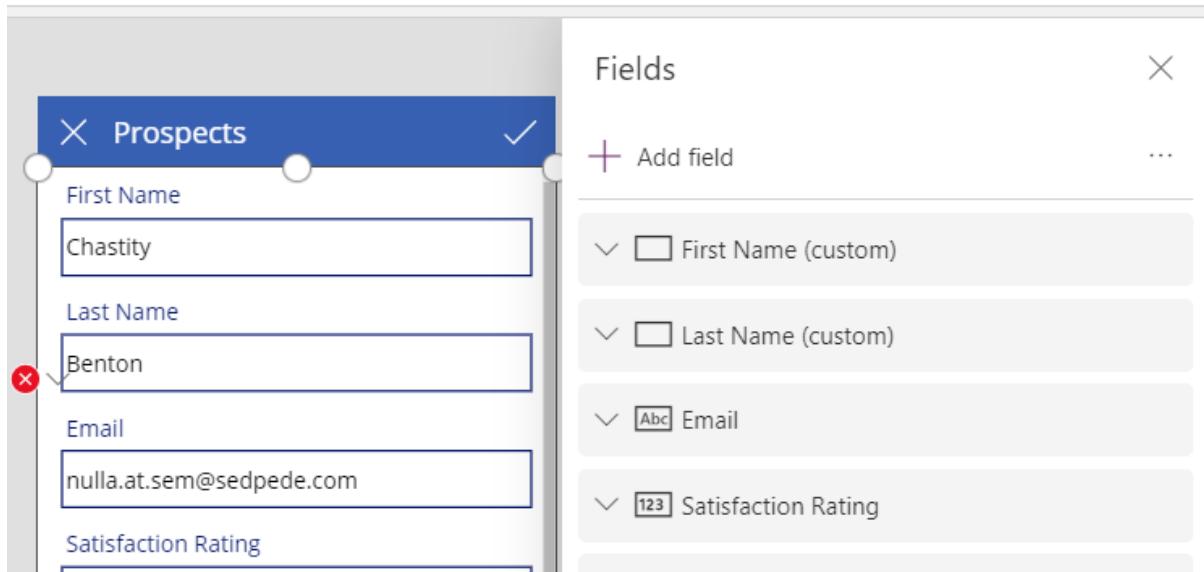
This will list the form fields that are available to the user for input. You can drag fields up and down in the form designer here. Move “First name” to the top of the list.

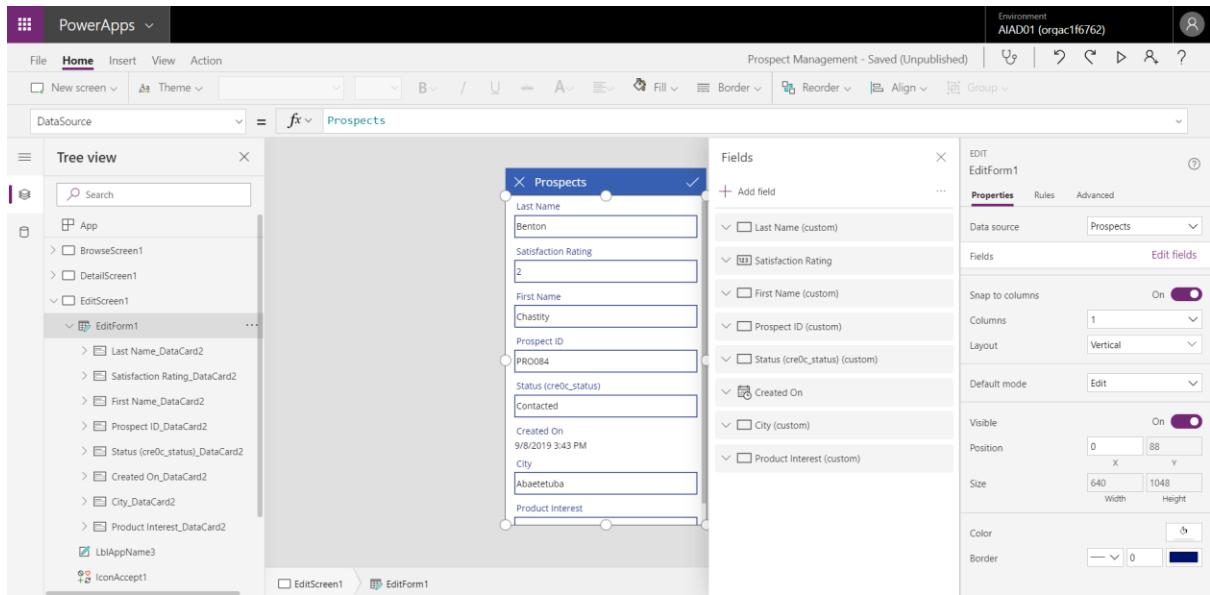


To add another field, select the “Add Field” option and then search for the field you would like to add. In this case, we will add the email field as it is used as the alert mechanism when running the Flow. Click the “Add” button to add this to the form.

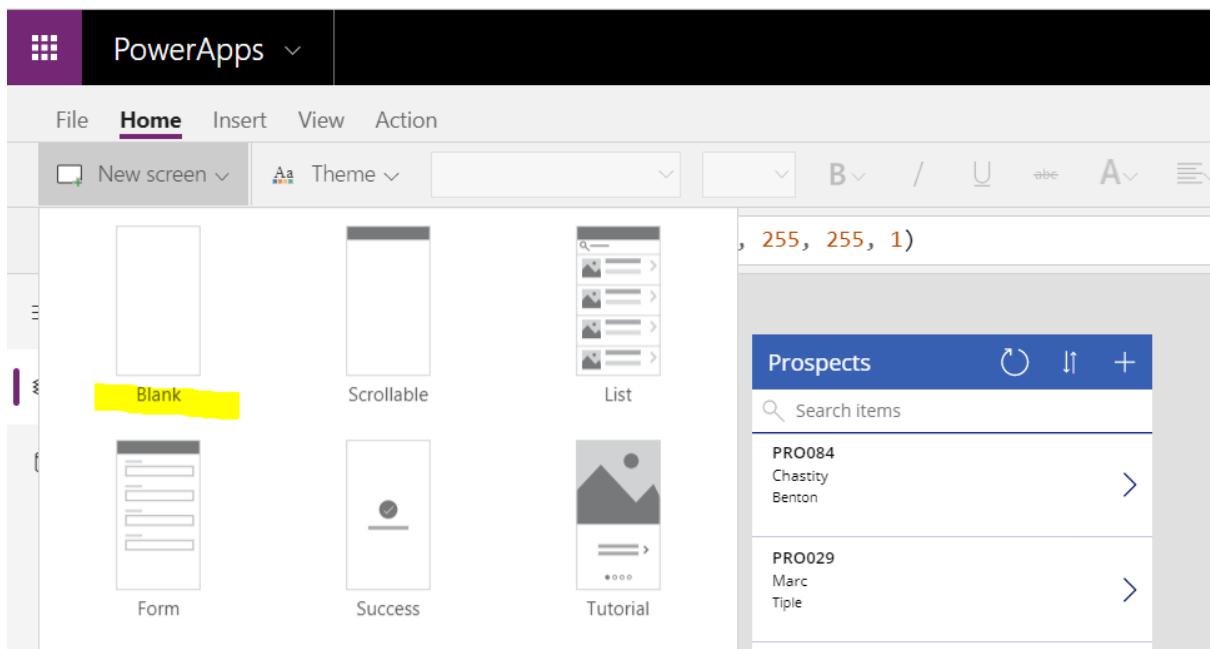


The Email field will be exposed in “Full Card” format. Select the field and drag it underneath “last Name on the form. (**NB: Sometimes the app will give you an error that has to do with the “MaxLength” value of the field. Do not edit this for now, you will still be able to capture data.**)

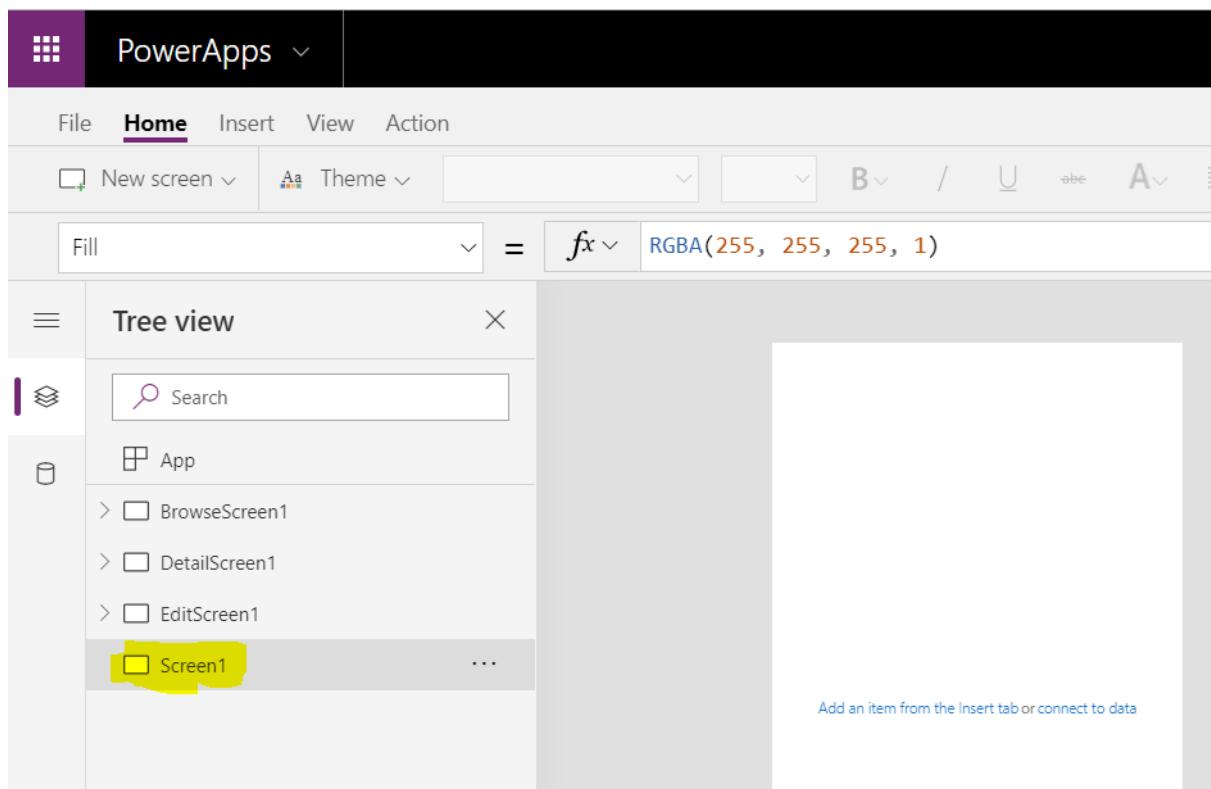




To make this application ready for the sales team we need to make sure that it is as user friendly as possible. In the home menu select the option to add a “New Screen” and then select “Blank”.



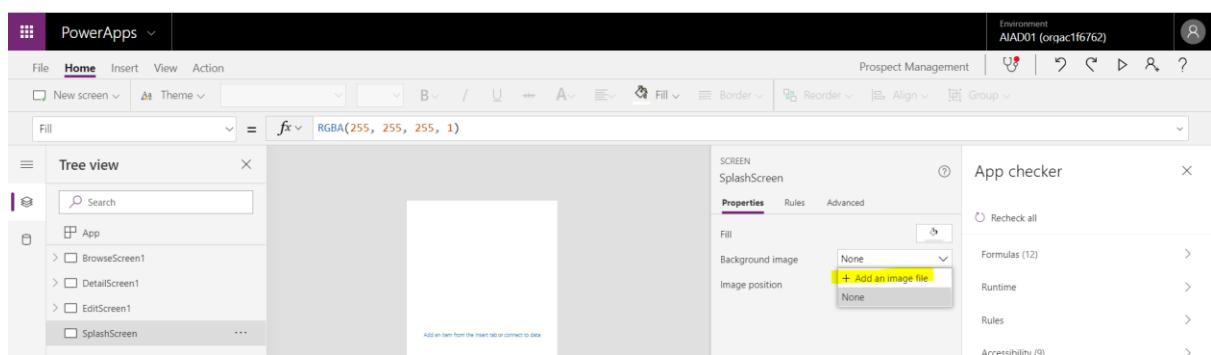
You will see a new blank screen appear in the Tree View.



Double click on the screen name and rename it to “SplashScreen”.



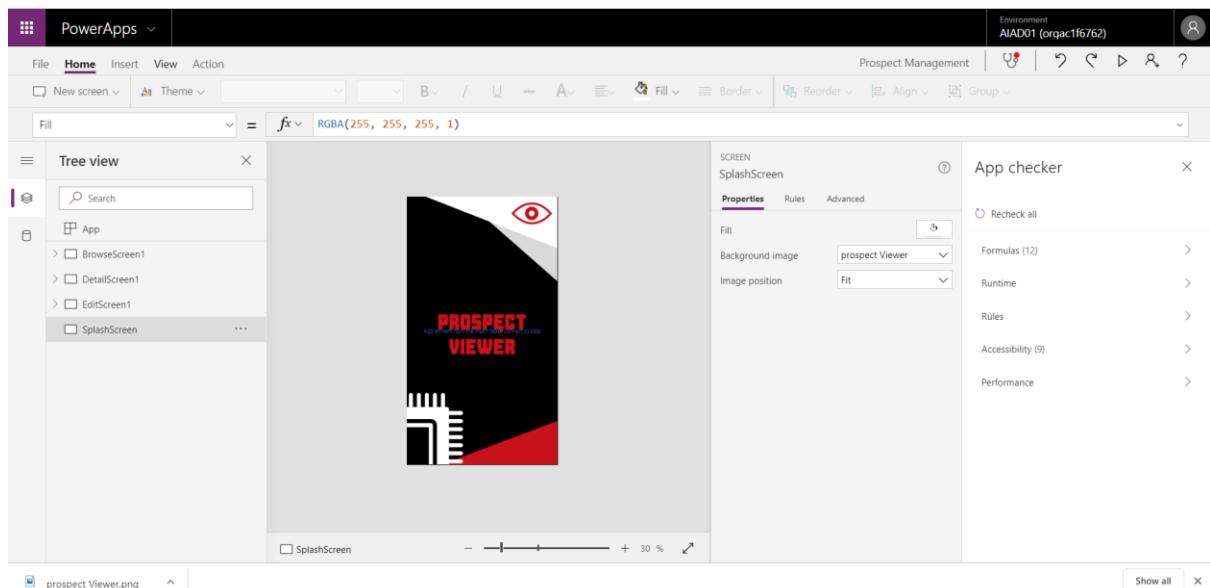
Update the Splash Screens image by either using one of our own images or using the example splash screen generated for this demo. In the Splash Screen select “background Image” from the screen properties panel.



Go to the file location that you stored the relevant image and upload it.

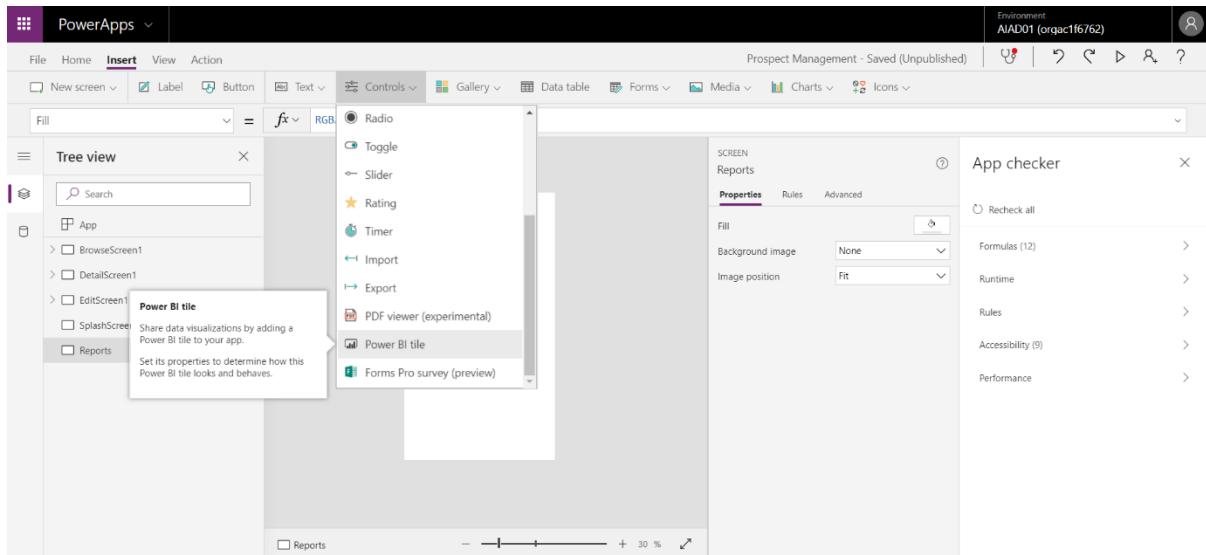


Your Splash Screen will look something like this.



Let's also add another new screen called "Reports". Do this in the same way as you added and renamed the Splash Screen.

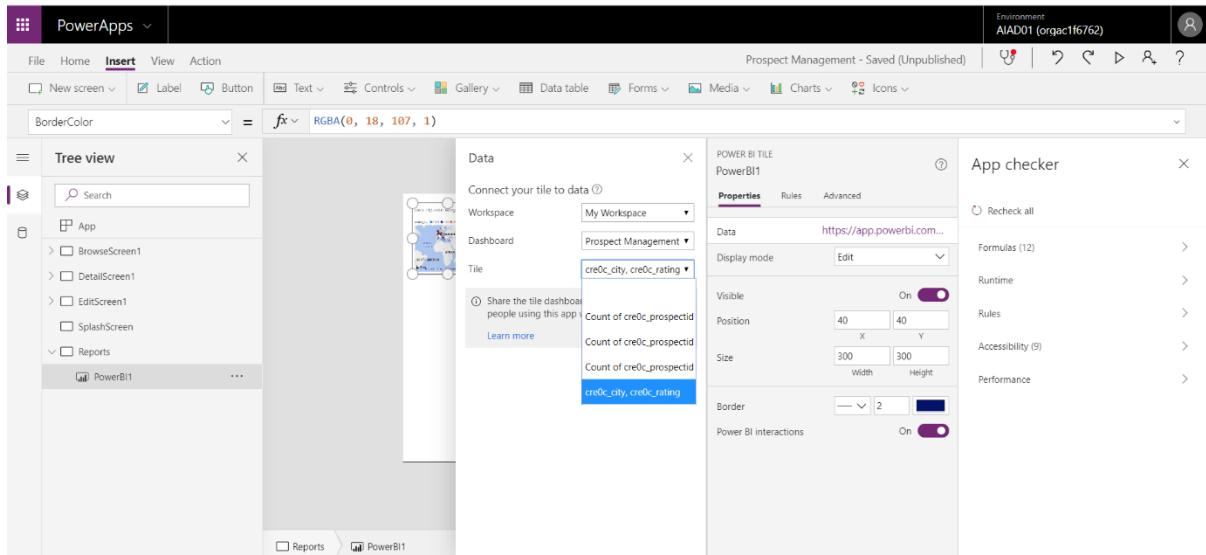
On the reports screen, navigate to "Insert" on the menu and then select "Controls". Add in a new "Power BI Tile".



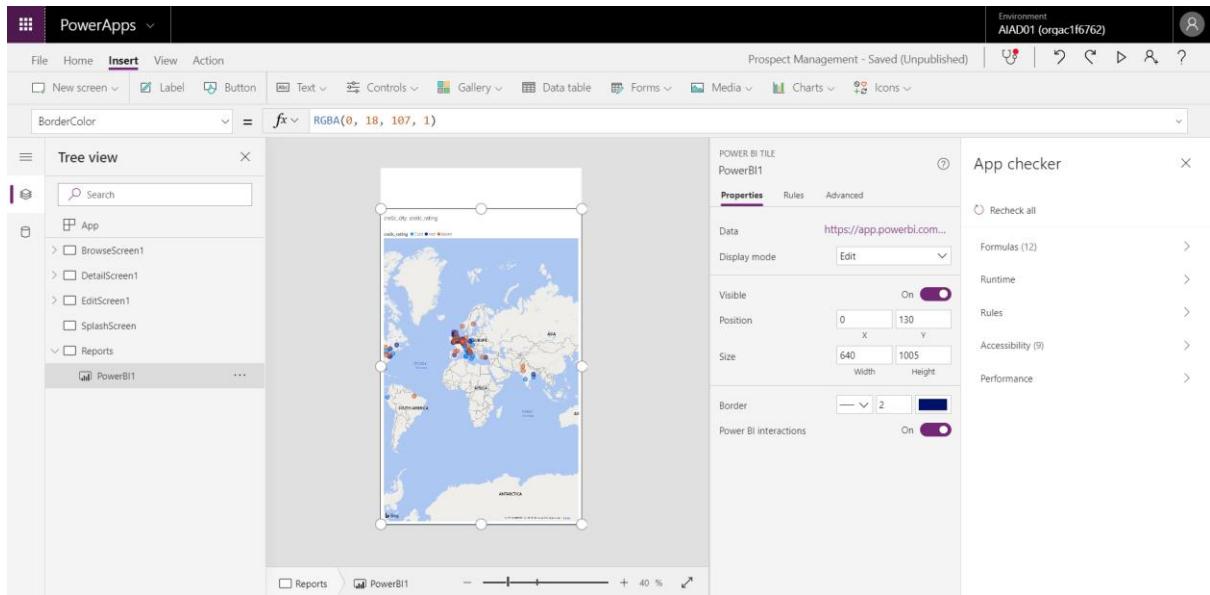
We are going to embed the MAP Power BI dashboard visualisation added in the previous lab, [found here](#). Update the following information into the connection details on the Power BI widget:

1. Workspace: My Workspace
2. Dashboard: “Prospect Management”
3. Tile: Select the tile containing the “City” & “Rating” fields.

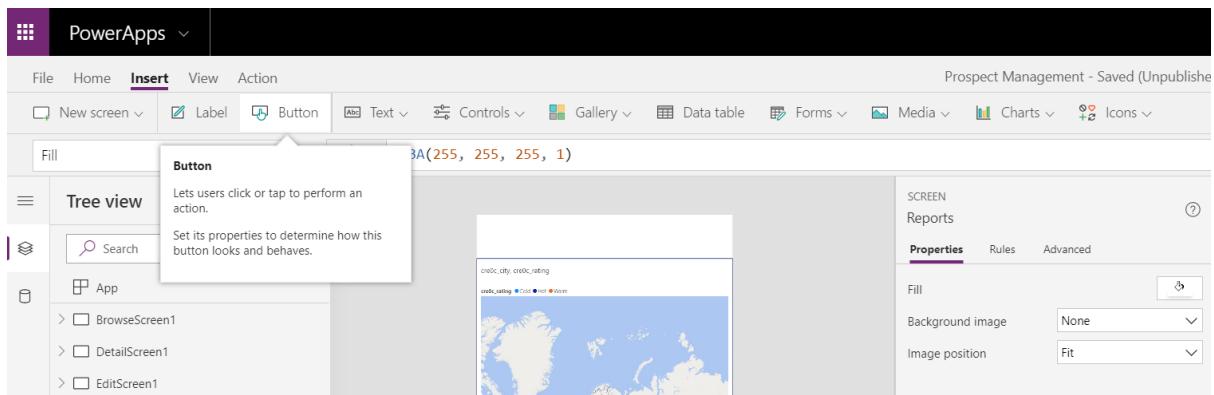
Close the connection details to get back to the Splash Screen.



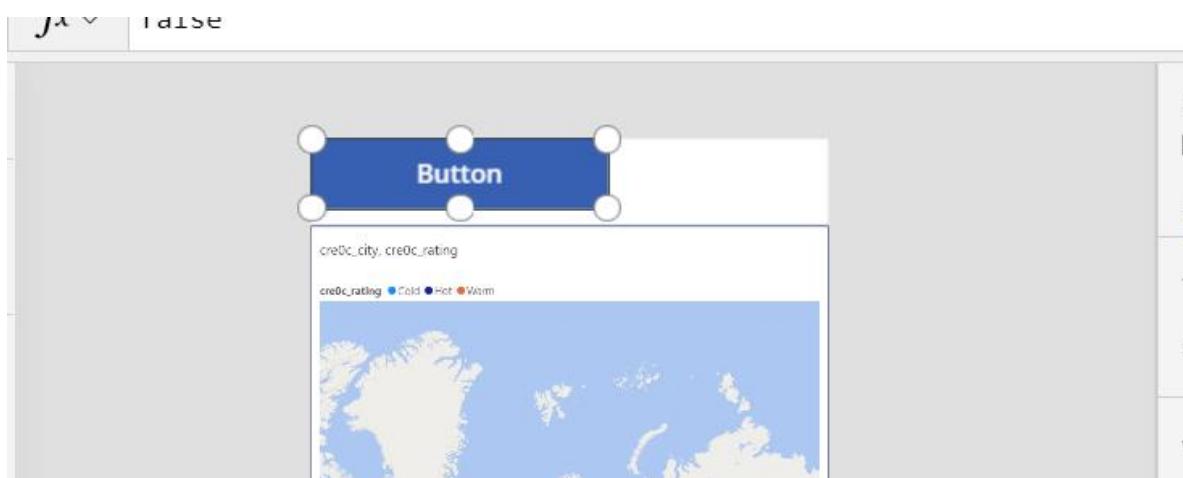
Resize the widget on the Splash screen to cover the entire screen, except for a piece on the very top.



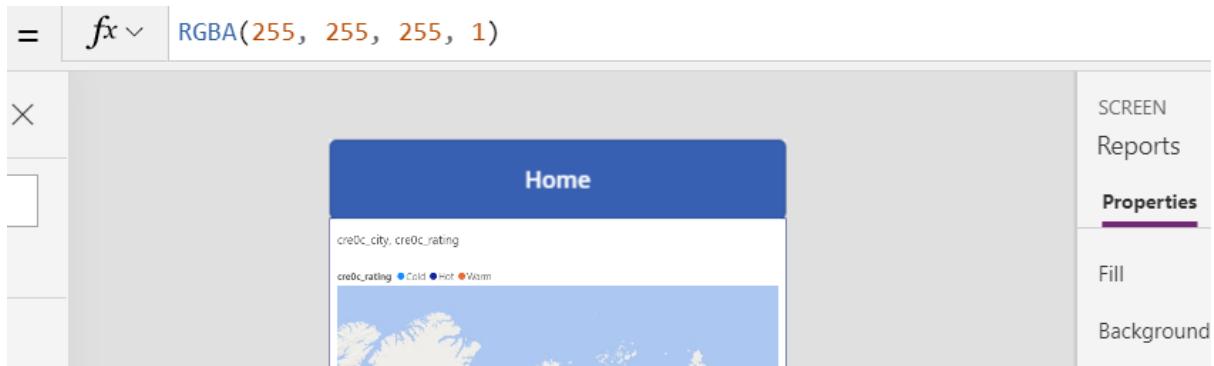
In the Splash Screen, navigate to the “Insert” menu and add in a new button by selecting the “Button” menu item.



Move and resize the button to cover the full area of the open blank section of the page.



Double click on the button and enter in the word “Home”.

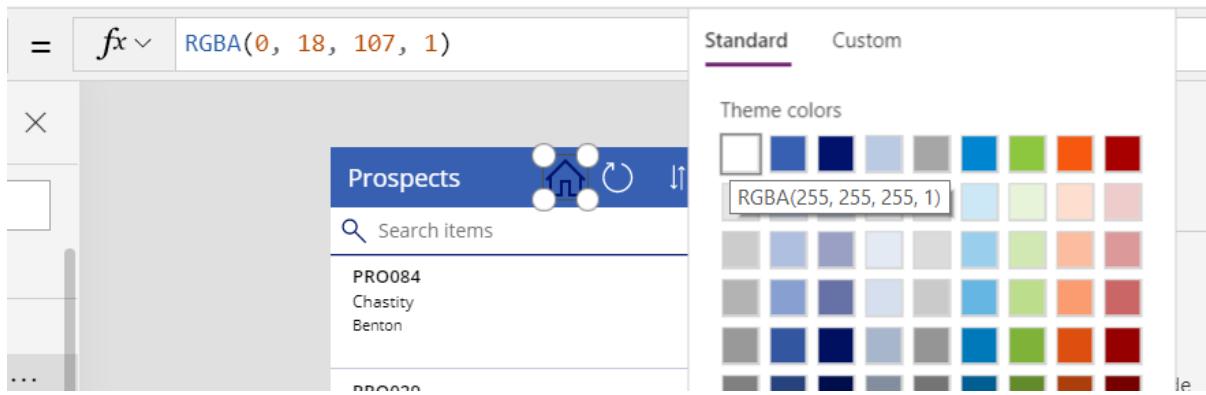


Select the “Browse Screen” from the Tree view on the left.

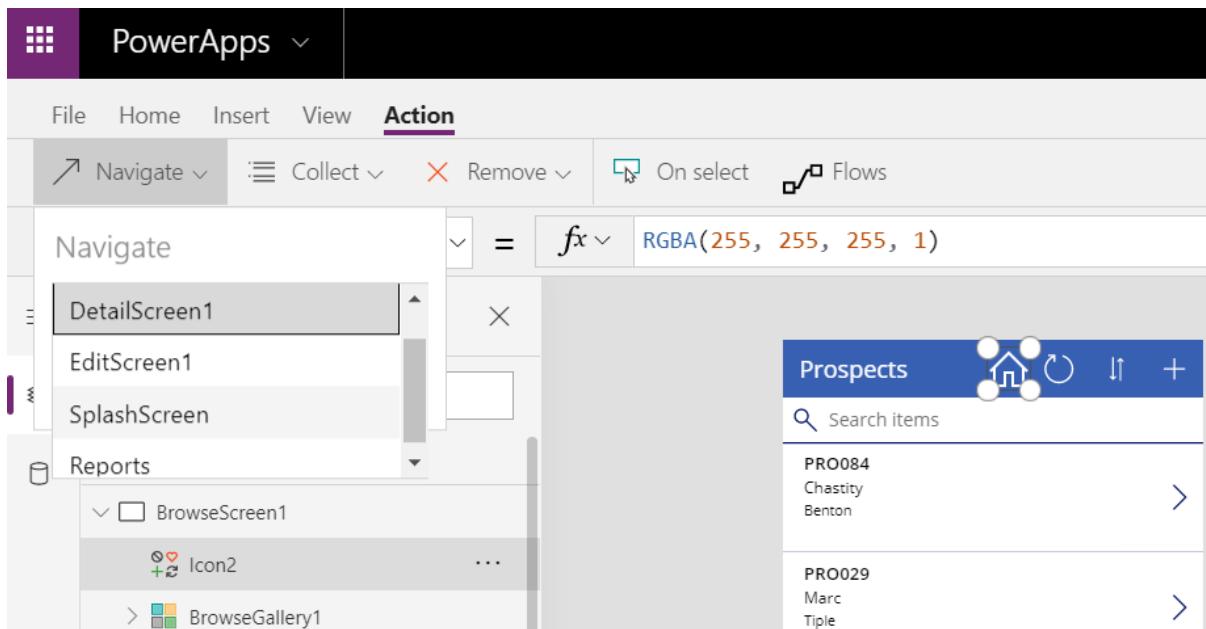
Navigate to the “Insert” menu and add in the icon in the shape of a house.

The Icon will land on a random location on the browse page.

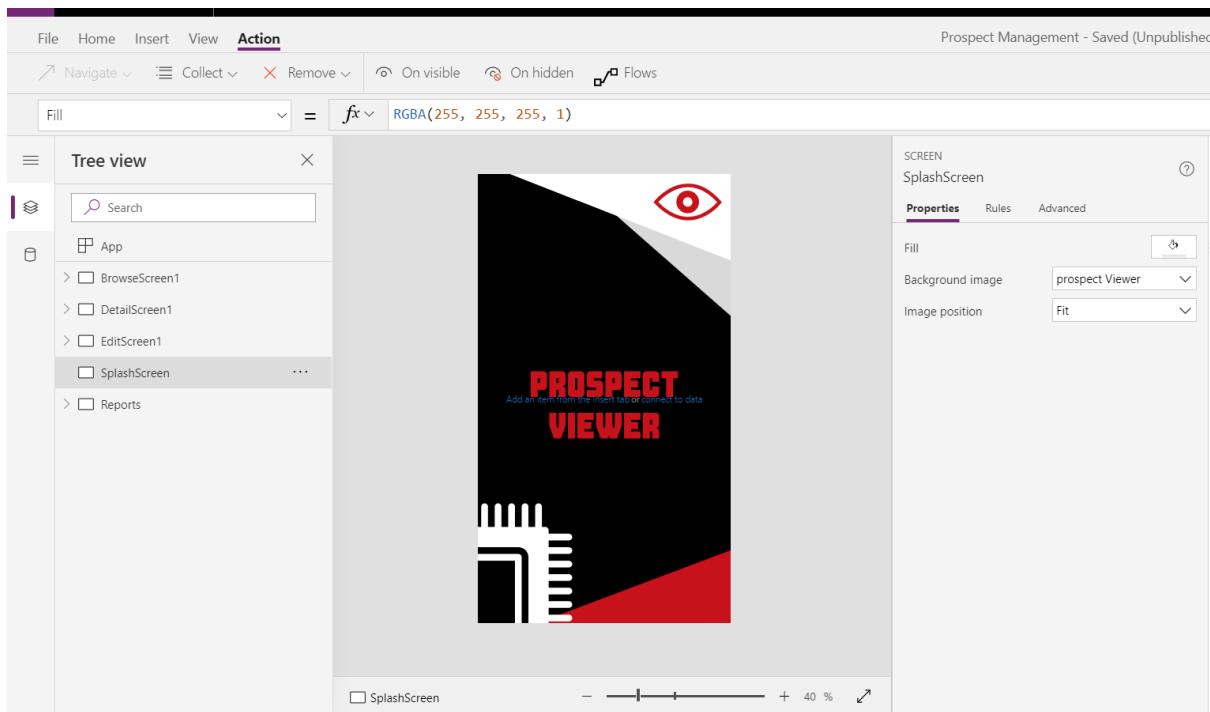
Select the icon and move it to the top menu of the browse screen. Navigate to the “Home” menu and change the colour of the icon to white.



Make sure the Home icon is selected. Navigate to the “Action” area on the menu and select “navigate”. Select the “SplashScreen” from the list of screens.



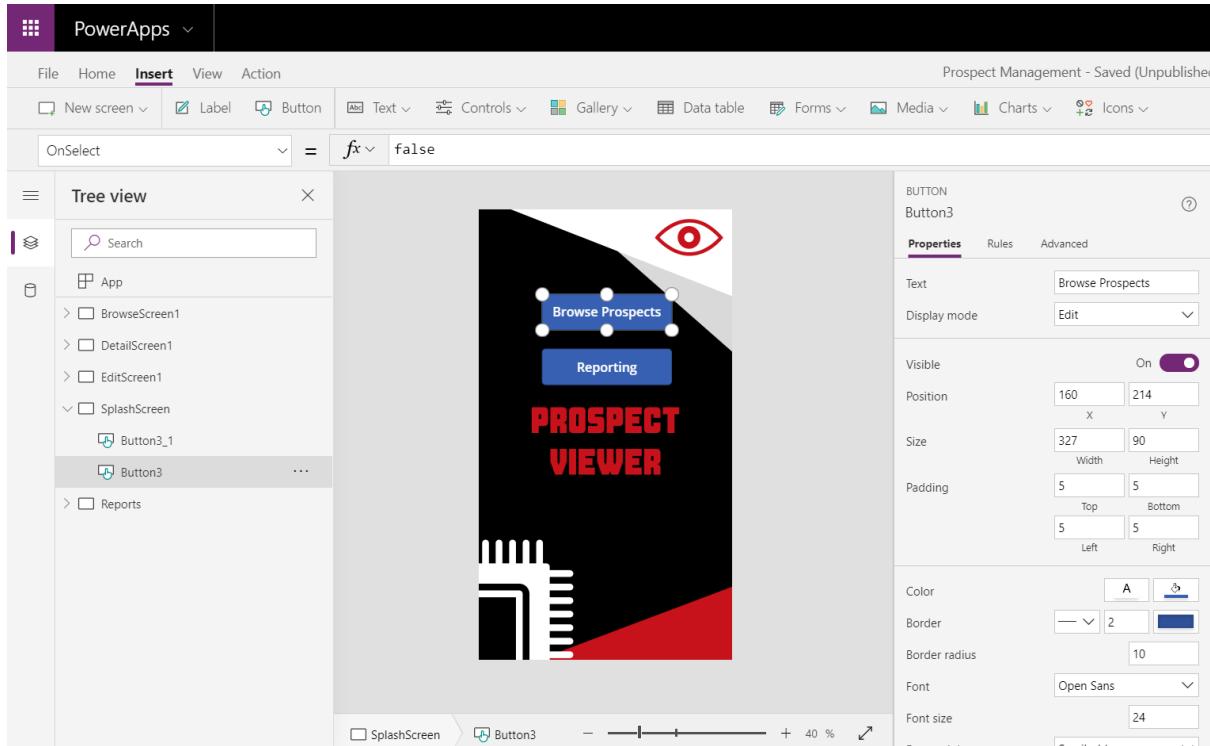
Navigate back to the SplashScreen in the tree view on the left.



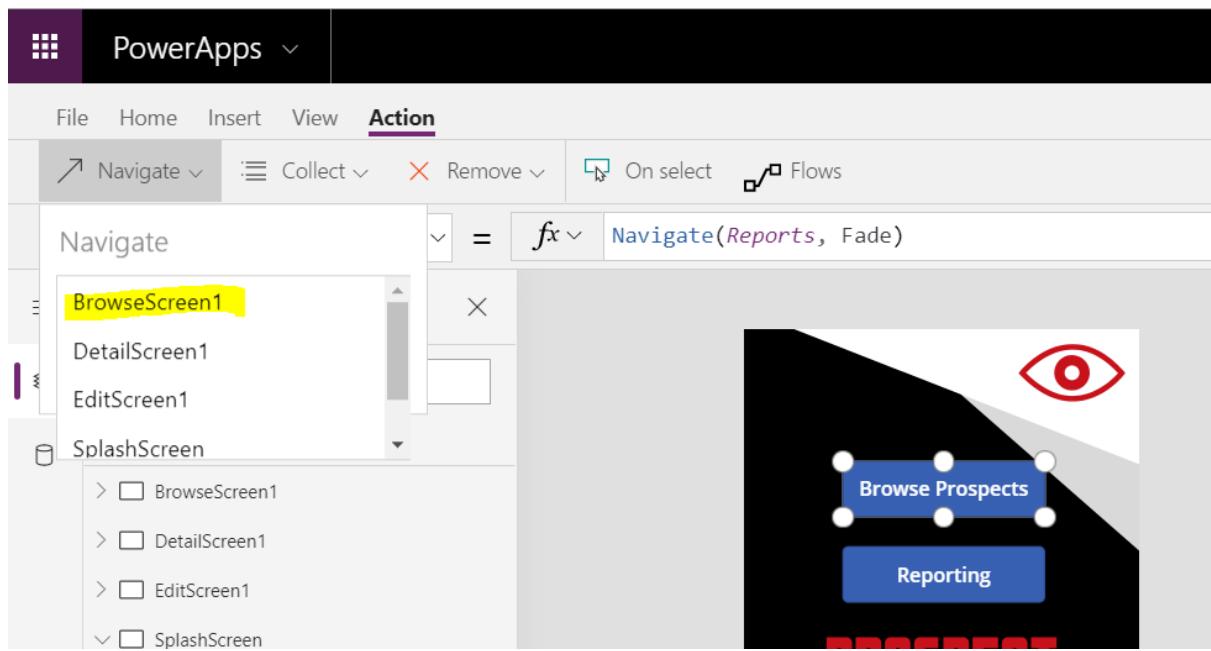
As done before, add in 2 new buttons and call them the following:

1. Browse prospects
2. Reporting

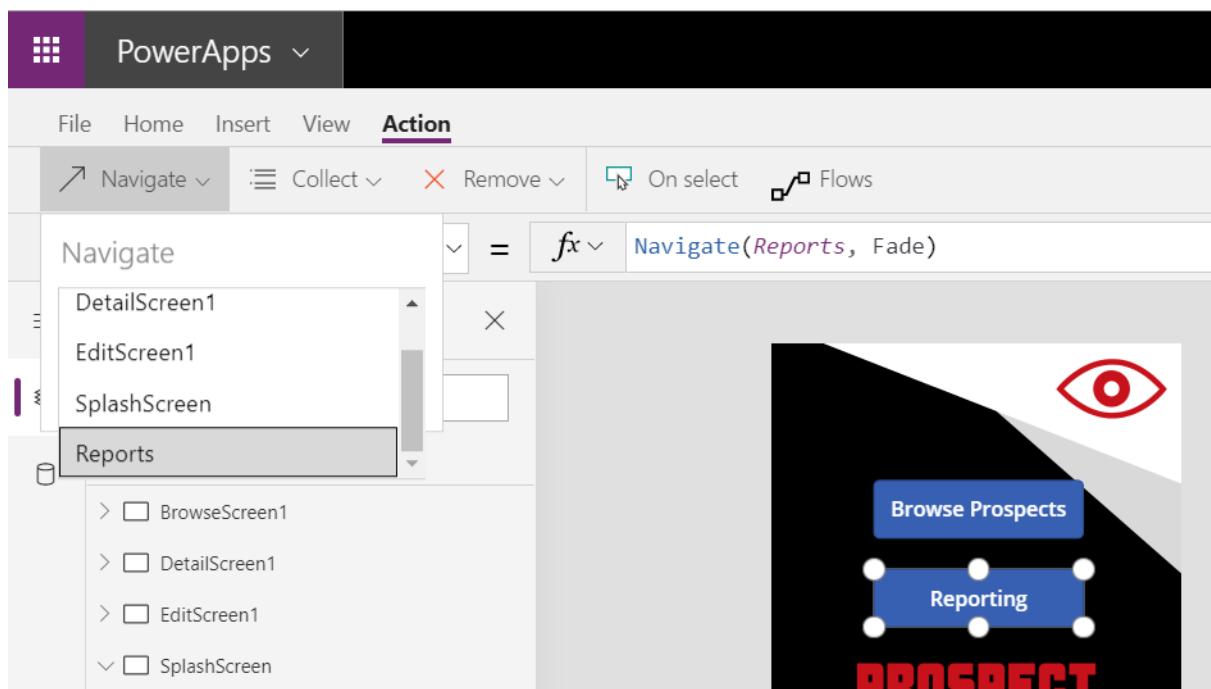
Resize the buttons as required.



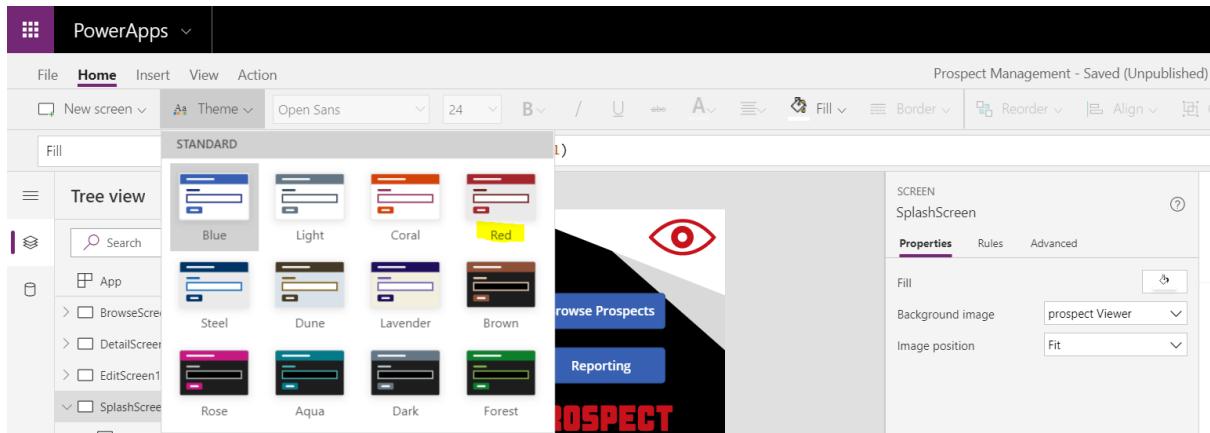
Select the first button and change the navigation to “Browse Screen”.



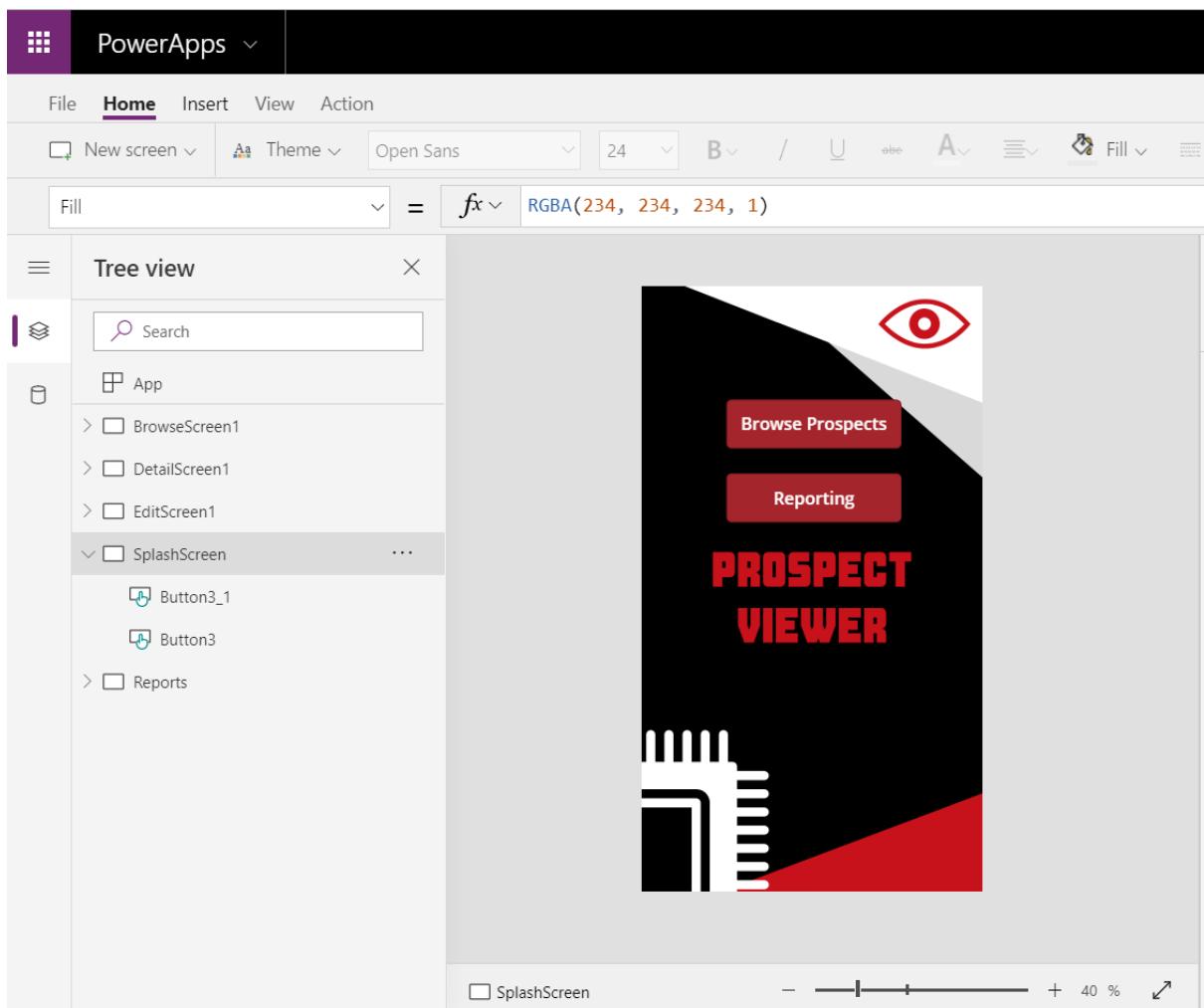
Select the Second button and change the navigation to “Reports”.

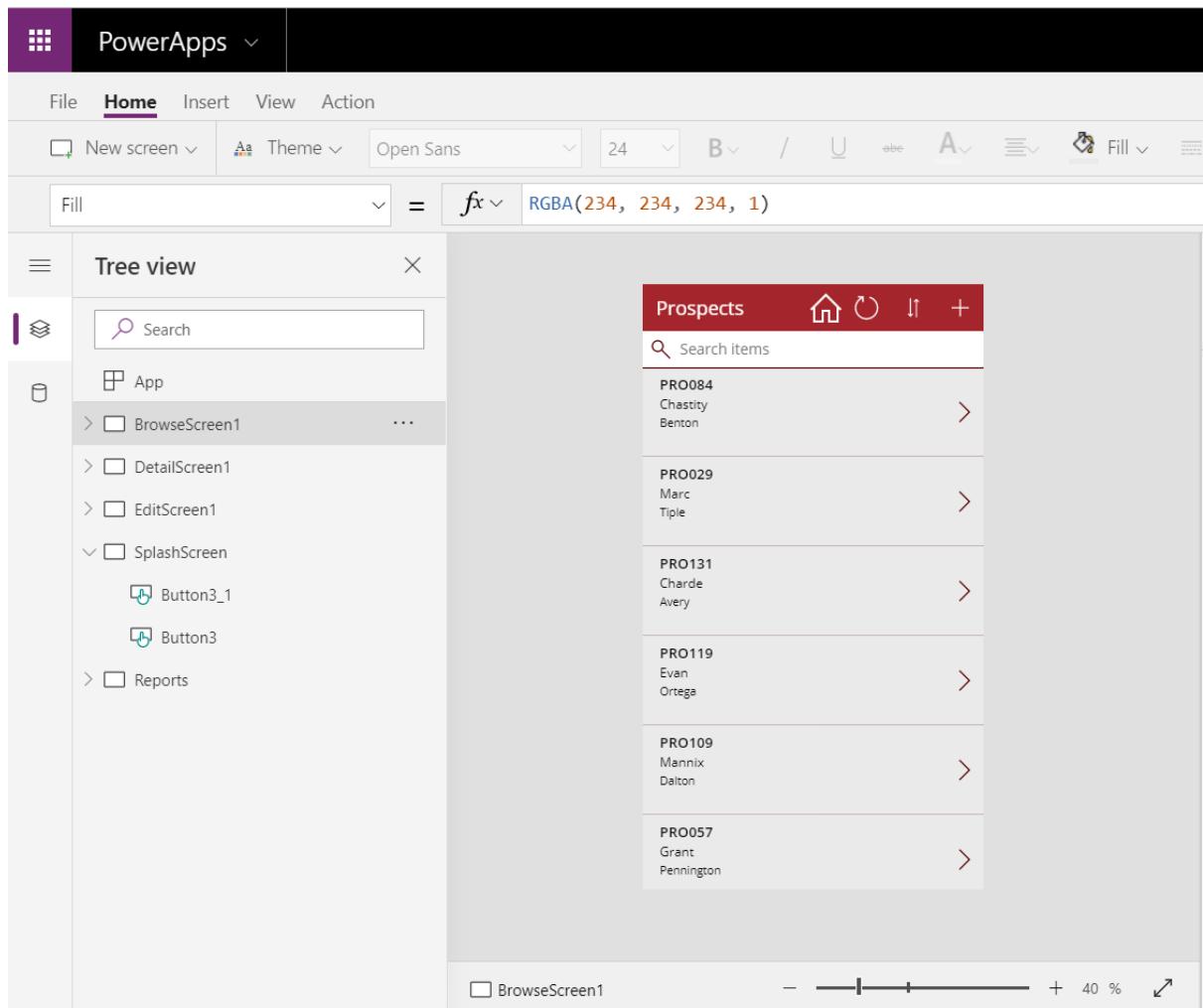


Finally, to make your app look just that little bit better, lets change the theme to a red theme. Navigate to “Home” from the menu and then select the “Red” theme from the theme options.

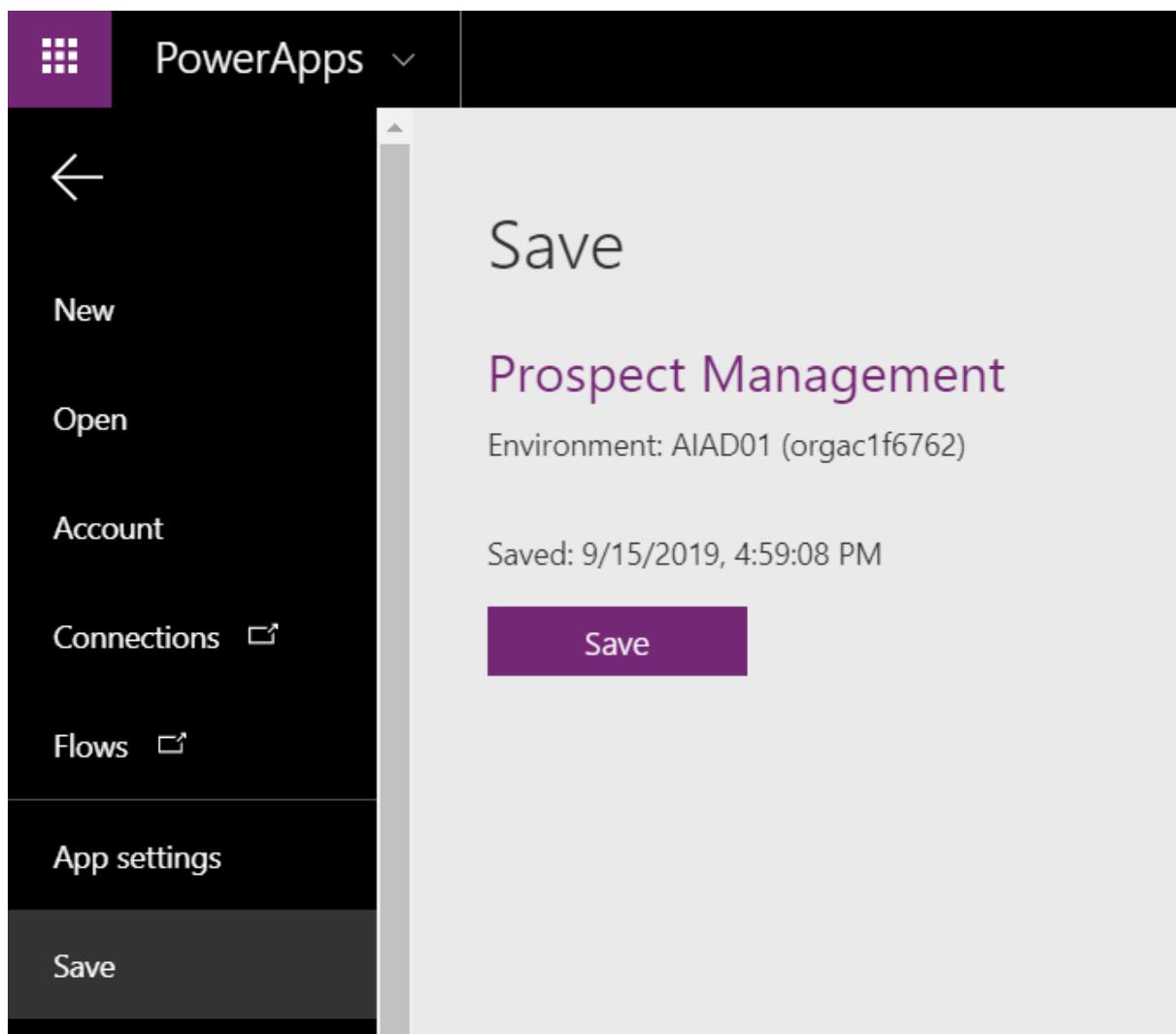


This will change the entire theme of all the core components of your app.

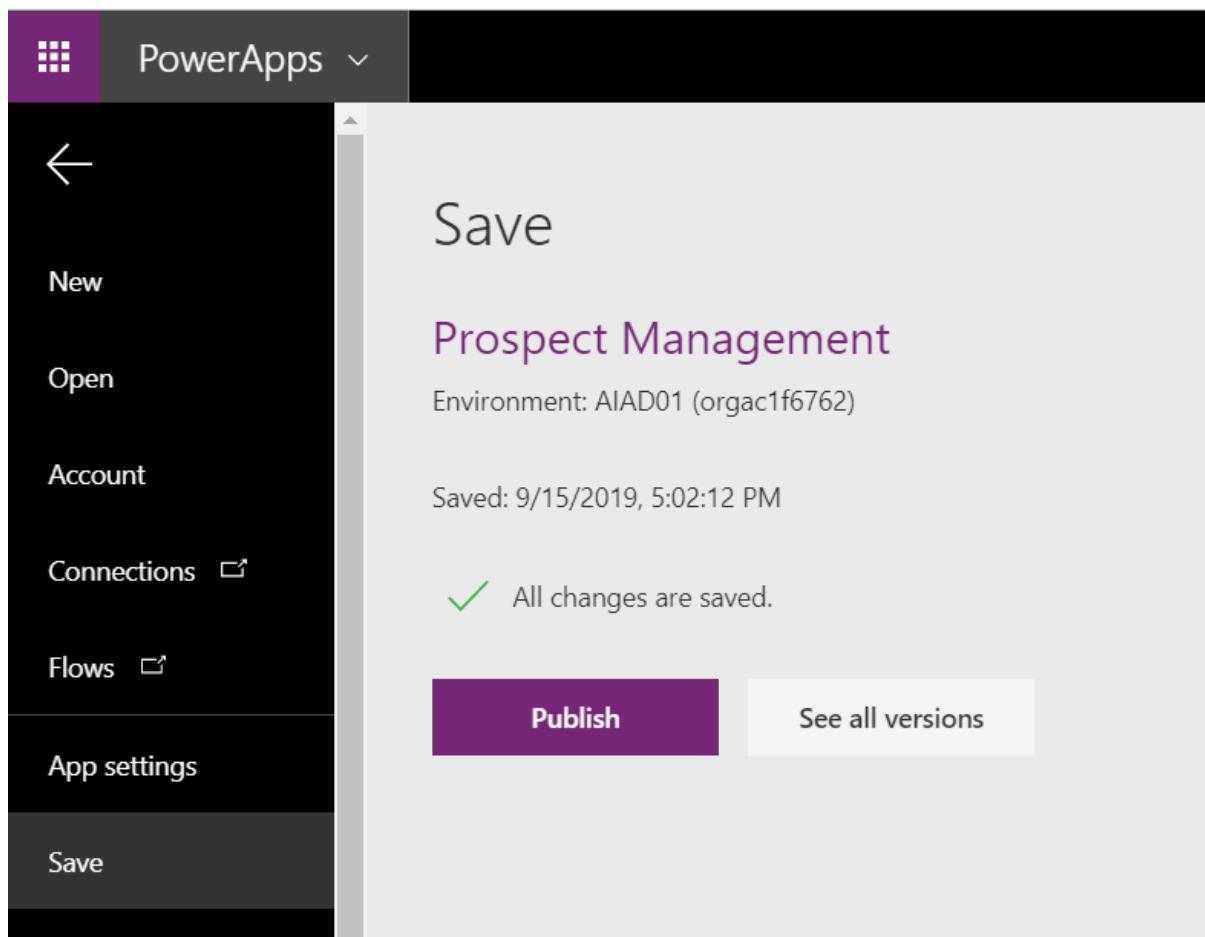




Make sure you save your application before testing it out. Select the file menu and then “Save”.



You can also now publish your app so that others may use it. Simply select “Publish” after you have saved.



Once you have published your application you will be able to see it in the list of apps when navigating to the App screen from the Maker Experience in PowerApps.

The screenshot shows the PowerApps App screen. The left sidebar has sections for Home, Learn, Apps (which is selected), Data, Entities, Option Sets, Dataflows, Connections, Custom Connectors, Gateways, Flows, AI Builder (preview), and Solutions. The main area lists 'Apps in AIAD01 (orgac1f6762)'. It shows three apps: 'Prospect Management' (Canvas, 49 sec ago, Chris huntingford), 'Prospect Management' (Model-driven, 4 h ago, Chris huntingford), and 'Solution Health Hub' (Model-driven, 1 wk ago, SYSTEM). There are tabs for Recent apps, Shared with me, Apps I can edit, and Org apps. The table columns are Name, Modified, Owner, and Type.

Name	Modified	Owner	Type
Prospect Management	49 sec ago	Chris huntingford	Canvas
Prospect Management	4 h ago	Chris huntingford	Model-driven
Solution Health Hub	1 wk ago	SYSTEM	Model-driven

Lab 7: 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.

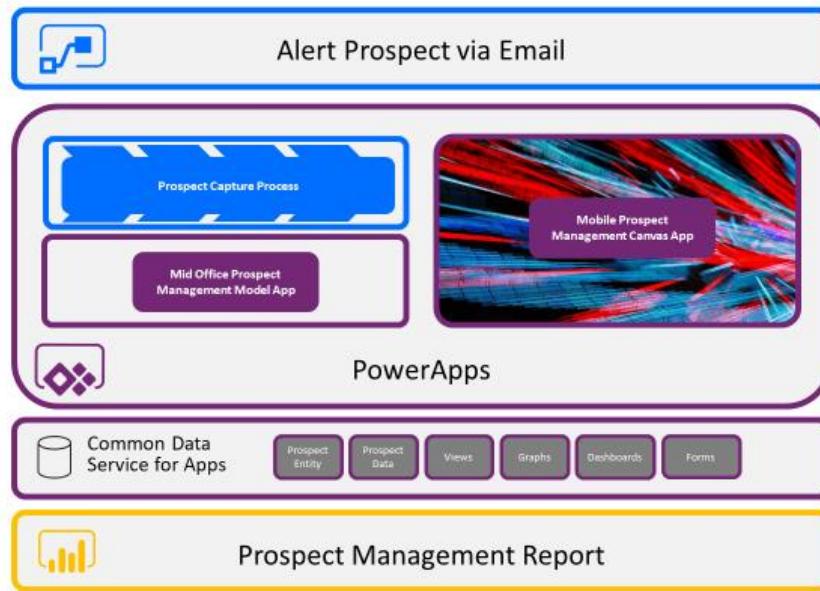
Solution Components

PowerApps: Canvas Apps

PowerApps: Model-driven Apps

Microsoft Flow

Power BI



Let's Begin

PowerApps Canvas App

1. Open your Canvas App from the Maker Experience (Make.PowerApps.com) and navigate around.
2. From the Splash Screen navigate to the Browse Screen.
3. Capture a new prospect with your email address.
4. Navigate to the browse screen and search for your record by surname.
5. Close the Canvas app.

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.

Microsoft Flow

1. Open your email and make sure you received an email affirming that the process for qualification is underway.

Power BI

1. Open the Power BI report and show how users can interact with data in a more insightful manner.

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.

