

# **M04 – Power Platform & Dynamics 365 Customer Service**

# Terms of Use

© 2015 Microsoft Corporation. All rights reserved.

Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

For more information, see **Microsoft Copyright Permissions** at <http://www.microsoft.com/permission>

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

The Microsoft company name and Microsoft products mentioned herein may be either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

**This document reflects current views and assumptions as of the date of development and is subject to change. Actual and future results and trends may differ materially from any forward-looking statements. Microsoft assumes no responsibility for errors or omissions in the materials.**

**THIS DOCUMENT IS FOR INFORMATIONAL AND TRAINING PURPOSES ONLY AND IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, WHETHER EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT.**

## Table of Contents

Lab Environment.....	4
Lab Overview.....	5
<b>Lab Completion Requirements .....</b>	<b>6</b>
Step-by-Step 1: Setup Supporting Configuration on the Account .....	7
Step-by-Step 2: Importing Data to the Account Entity.....	18
Step-by-Step 3: Importing Complaints .....	25
Step-by-Step 4: Configuring the Complaint functionality.....	35
Step-by-Step 5: Creating a Business process Flow .....	43
Step-by-Step 6: Creating a Model Driven App .....	50
Step-by-Step 7: Associating Complaints to cases.....	62
Step-by-Step 8: Manage your case -> Complaint Management Process .....	70
Step-by-Step 9: Update complaint parent case on resolution & .....	80

# Lab Environment

During this lab, you will work in a simulated environment with the following computers or virtual machines.

## ***Items Used in this Lab***

Item Name	Description
Office 365 Trial	You should have an Office 365 trial account that you can use for this lab.
Dynamics 365 Online Trial	You should have a Dynamics 365 Online Trial that you use for this lab.
Power Apps	You should have a Power Apps Trial that you use for this lab.
Power Automate	You should have a Power Automate Trial that you use for this lab.
Power BI	You should have a Power BI Trial that you use for this lab.
Power BI Desktop	You will need to download this and install it.

## ***Logon Credentials***

You will be using the login credentials that are associated with your Office 365 Trial subscription.

# Lab Overview

## **Abstract**

During this lab, you will run several exercises that will help you achieve a better understanding of the new service capabilities of Microsoft Dynamics 365 and how they work with the Power Platform. This will include power Apps, Power Automate and Power BI.

Your organization owns multiple hotels all over the country and you receive multiple guests every year. As it stands you receive multiple types of cases and complaints that need to be managed in a central location and taken through a process to completion. Various SLAs will need to be applied to these case types in order to promote a successful resolution.

One of the largest issues in your organization is the fact that there is very little reporting and very little automation that is applied to the data. This makes understanding the pitfalls and issues incredibly difficult.

Luckily, your organization has an implementation of Dynamics 365& Power Platform which can be leveraged to help solve the case management crisis

## **Learning Objectives**

After completing the exercises in this lab, you will be able to:

- Use Data flows to bring data into the Common Data Service
- Use the Data import Wizard
- Create a Model Driven App
- Create Business Process Flows
- Create Flow Approvals & Basic Flows
- Create a Canvas App

**Estimated time to complete this lab: 2 to 3 Hours**

# Lab Completion Requirements

---

In order to successfully complete this lab, you will need to design a solution that will deliver the ability to accomplish the following:

- Create fields on the Account Entity to hold Hotel information with associated Views & Forms.
- Create an Entity from Scratch using Data Flows
- Create an Entity and Import Data using Data Flows
- Associate child entities to the case entity
- Create a Model Driven Application
- Generate approval Flows
- Generate a Power BI report
- Generate a canvas Application

***Important:*** Do not forget to test your work as needed!

**Watch out!** The data is the most important part of this process. You need to do all configuration and data imports first, before building any applications.

# Step-by-Step 1: Setup Supporting Configuration on the Account

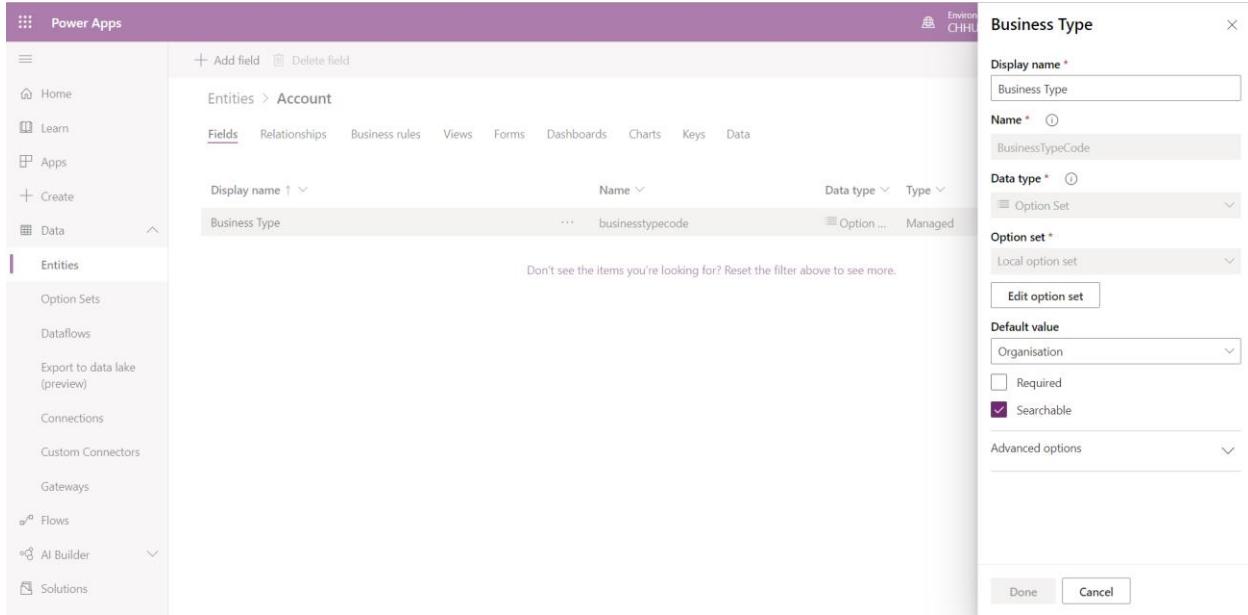
Below are step by step instructions that will guide you through the solution. Here you will add the necessary fields for the data import. Then you will update the Forms and Views with these fields.

1. Navigate to make.powerapps.com and open the “Data” Tab, then Select “Entities”. In the search box in the top right, search for “Business Type”.

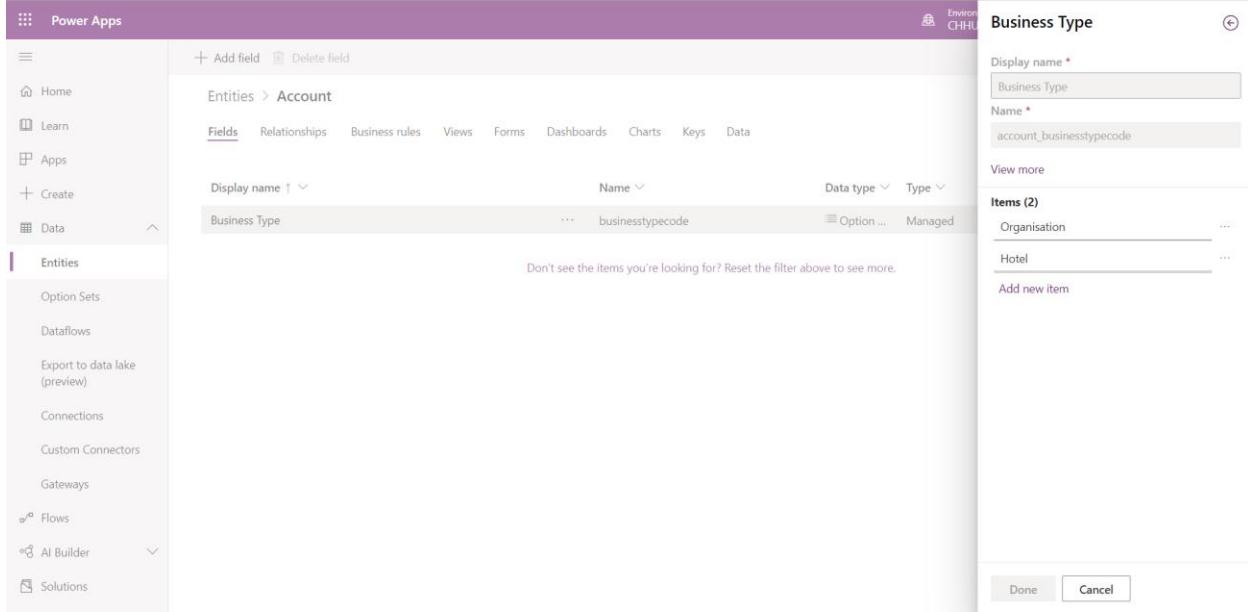
The screenshot shows the Power Apps Data Entities page for the Account entity. The left sidebar has sections for Home, Learn, Apps, Create, Data, and Entities. Under Entities, there are sub-options like Option Sets, Dataflows, Export to data lake (preview), Connections, Custom Connectors, Gateways, Flows, AI Builder, and Solutions. The main area displays a table of fields for the Account entity. The columns include Display name, Name, Data type, Type, Custom..., Required, and Searchable. Fields listed include Account (accountid, Unique, Standard, Required, Searchable), Account Name (Primary Field, name, Text, Managed, Required, Searchable), Account Number (accountnumber, Text, Managed, Required, Searchable), Account Rating (accountratingcode, Option, Managed, Required, Searchable), Address 1 (address1\_composite, Multilin..., Managed, Required, Searchable), Address 1: Address Type (address1\_addressesendcode, Option, Managed, Required, Searchable), Address 1: City (address1\_city, Text, Managed, Required, Searchable), Address 1: Country/Region (address1\_country, Text, Managed, Required, Searchable), Address 1: County (address1\_county, Text, Managed, Required, Searchable), Address 1: Fax (address1\_fax, Text, Managed, Required, Searchable), Address 1: Freight Terms (address1\_freighttermscode, Option, Managed, Required, Searchable), Address 1: ID (address1\_addressid, Unique, Standard, Required, Searchable), Address 1: Latitude (address1\_latitude, Floating..., Managed, Required, Searchable), Address 1: Longitude (address1\_longitude, Floating..., Managed, Required, Searchable), and Address 1: Name (address1\_name, Text, Managed, Required, Searchable). The "Searchable" column for the "Business Type" field is highlighted with a yellow box.

The screenshot shows the Power Apps Data Entities page for the Account entity, with a filter applied for "Business Type". The left sidebar is identical to the previous screenshot. The main area displays a table of fields for the Account entity, with only the "Business Type" field visible. The "Business Type" field has a value of "businesstypecode", a type of "Option...", and is marked as "Required" and "Searchable". The "Searchable" column for the "Business Type" field is highlighted with a yellow box.

2. Open up the “Business Type” field Mark the Business Type as Searchable and then select “Edit Optionset”.



### 3. Change the “Default” option to “Organisation” and add another option of type “Hotel”.



4. Select “Done” on both the Optionset screen and the “Business Type” entity screen to complete the process.
5. On the top right select “Add Field”

The screenshot shows the Microsoft Power Apps interface. On the left is a navigation sidebar with icons for Home, Learn, Apps, and Create. The main area is titled "Entities > Account". At the top right, there are buttons for "+ Add field", "Edit data in Excel", "Get data", and a dropdown menu. Below the title, tabs for Fields, Relationships, Business rules, and Views are visible. A "Display name ↑" button is also present.

6. Give the new field the name of “Rating”

The screenshot shows the Microsoft Power Apps Fields editor for the "Rating" field. The left sidebar shows "Entities" selected. The main area displays a table with columns for Display name, Name, Data type, and Type. The "Name" column shows "businesstypecode". On the right, detailed configuration options are shown, including:

- Display name \***: Rating
- Name \***: crf8f\_ Rating
- Data type \***: Text
- Required**: Unchecked
- Searchable**: Checked
- Calculated or Rollup**: + Add

At the bottom are "Done" and "Cancel" buttons.

7. Select the “Whole Number” data type.

8. Update the minimum value to “0” and the maximum value to “10”.

The screenshot shows the Microsoft Power Apps Entities screen for the 'Account' entity. On the left, there's a navigation bar with options like Home, Learn, Apps, Create, Data, Entities, Option Sets, Dataflows, Export to data lake (preview), Connections, Custom Connectors, Gateways, Flows, AI Builder, and Solutions. The main area displays fields for the 'Account' entity, including 'Business Type' and 'businesstypecode'. A modal window titled 'Rating' is open on the right, allowing the creation of a new field. The 'Name' field is set to 'crf8f\_Rating', 'Data type' is 'Whole Number', and 'Searchable' is checked. There are also sections for 'Description', 'Minimum value' (0), and 'Maximum value' (1). At the bottom of the modal are 'Done' and 'Cancel' buttons.

9. Click “**Done**” once completed

10. Click “**Save Entity**” when completed.

**Discard**

**Save Entity**

11. Click “**Solutions | Publish All Customisations**”

The screenshot shows the Microsoft Power Apps interface. On the left, there's a navigation sidebar with options like Home, Learn, Apps, Create, Data (Entities, Option Sets, Dataflows), Export to data lake (preview), Connections, Custom Connectors, Gateways, Flows, AI Builder, and Solutions. The 'Solutions' option is selected and highlighted in yellow. The main area is titled 'Solutions' and lists various solutions with columns for Display name, Name, Created, Version, Managed externally?, and Solution check. Some solutions have status icons like a play button or a checkmark.

Display name	Name	Created	Version	Managed externally?	Solution check
Loyalty Management	LoyaltyManagement	12/9/2019	1.0.0.0	Hasn't been run	
Contextual Help Base	msdyn_ContextualH...	11/22/2019	1.0.0.10	Checked by publ...	
Contextual Help	msdyn_ContextualH...	11/22/2019	1.0.0.10	Checked by publ...	
UFO	UFO	11/20/2019	1.0.0.1	Hasn't been run	
Dynamics 365 Portals - Customer Self-Service ...	CustomerPortal	11/13/2019	9.1.9.0	Checked by Micr...	
Dynamics 365 Portals - Knowledge Management	KnowledgeManage...	11/13/2019	9.1.9.0	Checked by Micr...	
Dynamics 365 Portals - Customer Service	CustomerService	11/13/2019	9.0.12.10	Checked by Micr...	
Dynamics 365 Portals - Discussion Forums Wor...	MicrosoftForumsWo...	11/13/2019	9.0.6.1	Checked by Micr...	
Dynamics 365 Portals - Discussion Forums	MicrosoftForums	11/13/2019	9.1.9.0	Checked by Micr...	
Dynamics 365 Portals - Bing Maps Helper	MicrosoftBingMaps...	11/13/2019	9.0.11.0	Checked by Micr...	
Dynamics 365 Portals - Get Record ID Workflo...	MicrosoftGetRecord...	11/13/2019	8.1.0002	Checked by Micr...	
Microsoft Flow Extensions core package	MicrosoftFlowExtens...	11/3/2019	1.0.0.3	Checked by Micr...	

12. Navigate to “Data | Entities” and locate the account entity.

13. Open the Account entity and navigate to “Forms”

The screenshot shows the Dynamics 365 Entity Forms page for the 'Account' entity. At the top, there are navigation links: ADD FORM, EDIT DATA IN EXCEL, GET DATA, EXPORT DATA, and SETTINGS. Below that, the breadcrumb path is 'Entities > Account'. The main navigation tabs are Fields, Relationships, Business rules, Views, Forms (which is underlined in blue), Dashboards, Charts, Keys, and Data. Under the 'Forms' tab, there's a section labeled 'Model-driven' with a small icon. The list of forms is sorted by Name (with an up arrow) and Form type (with a down arrow). There are two entries: 'Account' (Main form) and 'account card' (QuickViewForm).

Name	Form type
Account	Main
account card	QuickViewForm

14. Open the default account form and select “Save As” from the “Save” menu

The screenshot shows the Microsoft Power Apps Form builder for the 'Account' entity. The title bar says 'Power Apps | Form'. The top menu includes Back, Add Field, Add Component, Undo, Redo, Cut, Paste, Delete, Switch to classic, Save, Publish, and a 'Edit header density' button. A tooltip message at the top right says: 'We've upgraded your form to show a high density header that displays more data. You can edit this setting in the properties of the header.' Below the menu, there's a 'Fields' section with a table showing one row for 'Account'. To the right, there's a 'Save as' dialog box with the 'Account Form' selected. The overall interface is clean and modern, typical of Microsoft's Power Apps tools.

15. Save the form as “Hotel”

New Account  
Account

**Summary** Project Price Lists Details Field Service Scheduling Files

**ACCOUNT INFORMATION**

- Account Name
- Phone
- Fax
- Website
- Parent Account
- Ticker Symbol
- Relationship Type
- Product Price List
- Cases Escalated
- Last updated: Not Available
- Cases on Hold
- Last updated: Not Available
- Total Cases

**ADDRESS**

- 
- 

**Save as...**

**Display Name \***

**Description \***

**Save** **Cancel**

\*\*\* Annual Revenue \*\*\* Number of Employees Chris Huntingford Owner

13/09/2019 00:00 ...  
Reviewed Goods  
Reviewed Goods 09/12/2019 12:00 ...  
29/11/2019 00:00 ...

Select Primary Contact  
Email Business

CONTACTS No data available.

16. You will see the form name on the right hand side

Environment CHHUNTIN\_PTA

Chris Huntingford Owner

Employees Select ...

Save | Publish

Test Hotel >  
Form

17. In the Field Explorer on the right search for the “Business Type” field that you previously updated.

Power Apps | Form

Add Field Add Component Undo Redo Cut Paste Delete Switch to classic

### Fields

Account

bus Default

+ New field  Show only unused fields

Business Type

New Account  
Summary Project Price Lists Details Field Service Scheduling Files

ACCOUNT INFORMATION

Account Name	---
Phone	---
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---
Relationship Type	---
Product Price List	---
Cases Located	---
Last updated	Not Available
Cases on Hold	---
Last updated	Not Available
Total Cases	---

ADDRESS

---
---
---
---
Action

Timeline

This record hasn't been created yet. To view this record, save it to your timeline.

13/09/2019 00:00
Review Goods
(07/10/2019 11:00)
74/10/2019 00:00

Primary Contact

Email
Business

CONTACTS

No data available.

18. Drag and drop this onto the form

Power Apps | Form

Add Field Add Component Undo Redo Cut Paste Delete Switch to classic

### Fields

Account

bus Default

+ New field  Show only unused fields

There are no fields to display.

New Account  
Summary Project Price Lists Details Field Service Scheduling Files

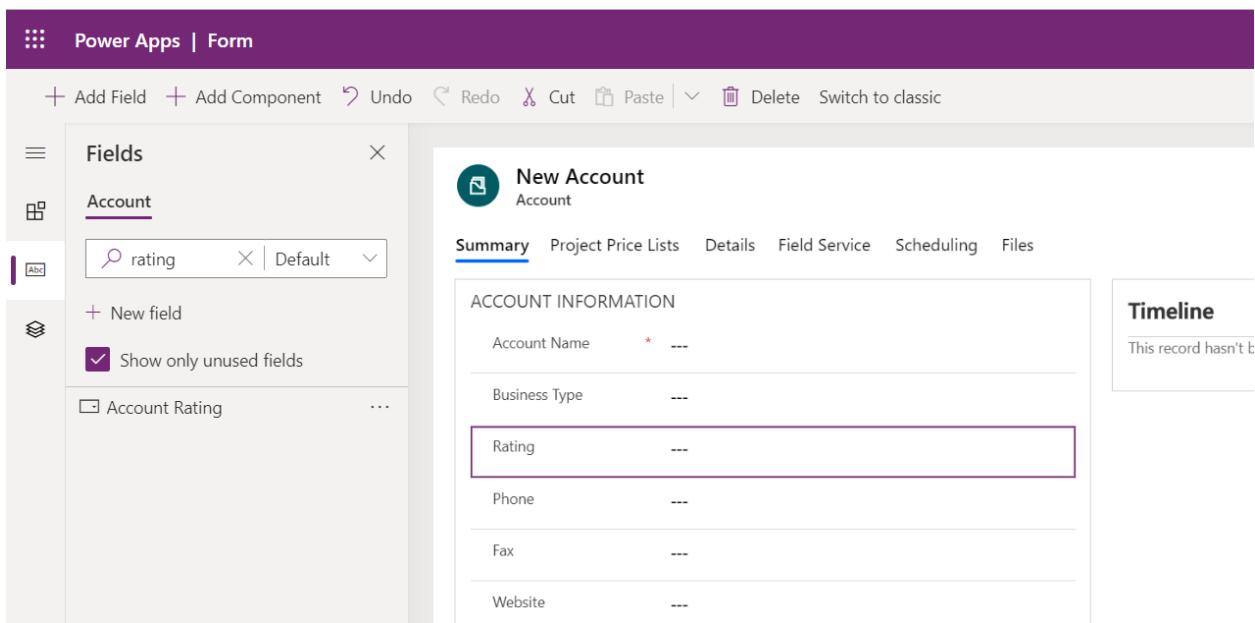
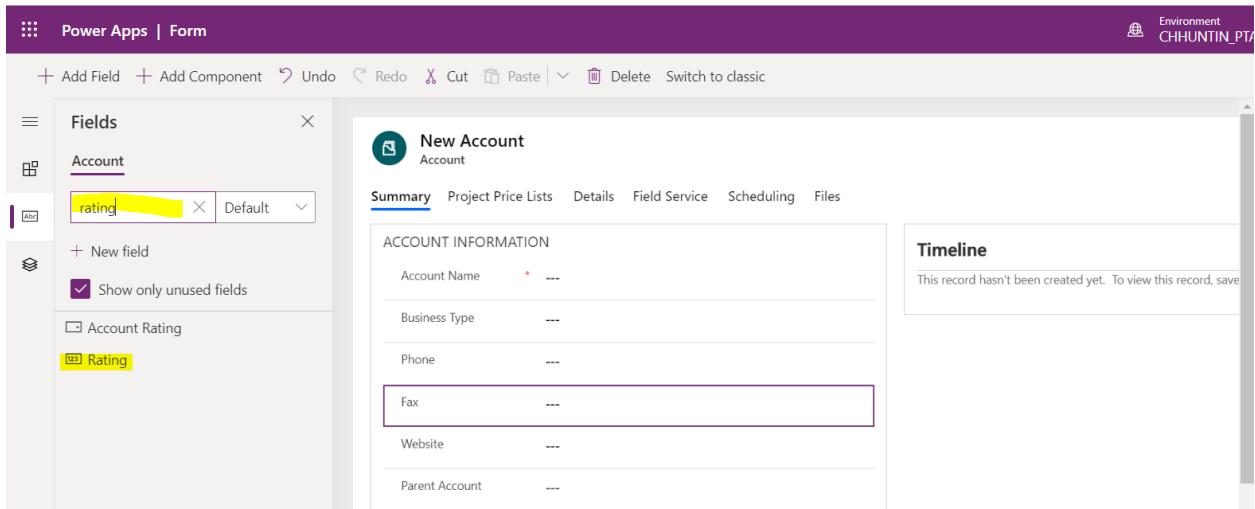
ACCOUNT INFORMATION

Account Name	*	---
Business Type	---	---
Phone	---	---
Fax	---	---
Website	---	---
Parent Account	---	---
Ticker Symbol	---	---
Relationship Type	---	---

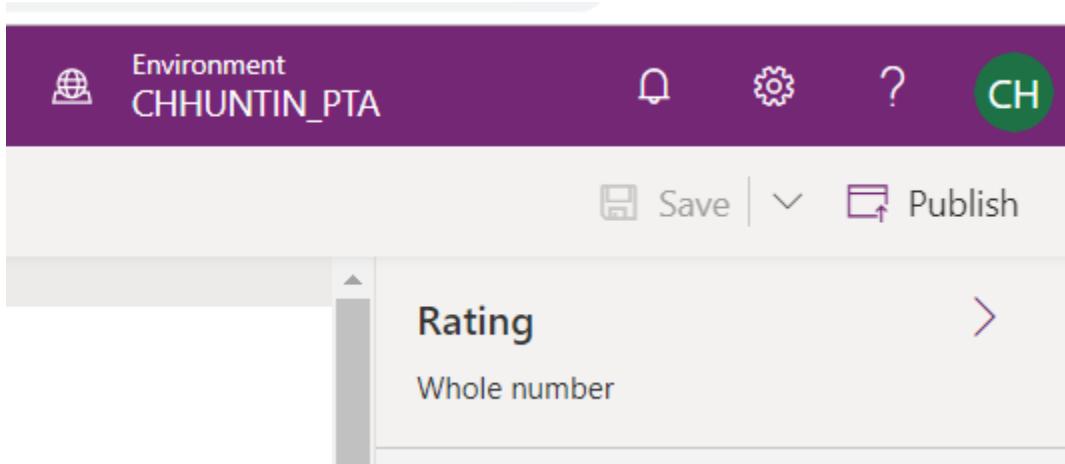
Timeline

This record hasn't been created yet. To view

19. In the same manner search for the “Rating” field and add it to the form.



20. Save the form (The save button will be disabled once saved) and then Publish the form.



21. The back button may not be available in the Maker Experience form editor. To get back, Make sure you have published and dimly open another browser “[Make.PowerApps.com](#)” tab, then close the old one. If the back Button is available, navigate back to your main Account entity.

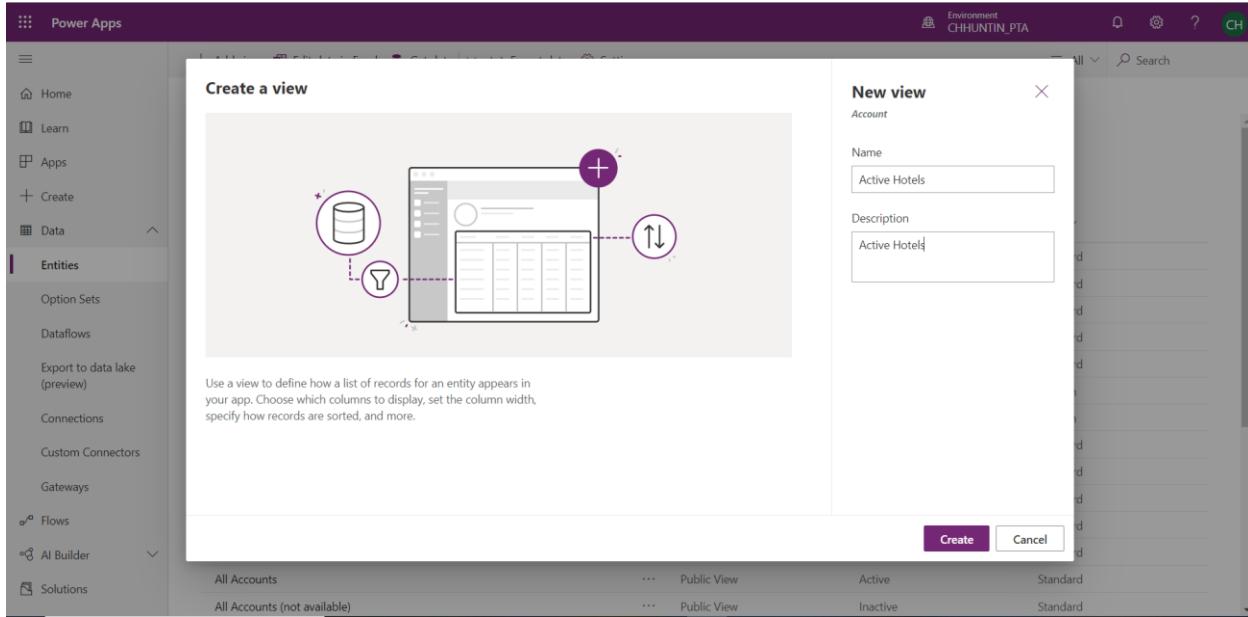
The screenshot shows the Power Apps maker interface. On the left, a sidebar titled 'Fields' lists the 'Account' entity. Under 'Account', there is a search bar with 'rating' and a dropdown set to 'Default'. Below it are buttons for '+ New field' and 'Show only unused fields'. On the right, a preview of the 'New Account' form is shown with the 'Summary' tab active. The form has sections for 'ACCOUNT INFORMATION' and 'Account Name'.

22. Navigate to “Data | Entities” and then open the Account entity. Navigate to the “Views” section.

The screenshot shows the Dynamics 365 Data | Entities view for the 'Account' entity. The 'Views' tab is selected. A table lists various views:

Name	Type	Status	Type
Account Advanced Find View	Advanced Find View	Default	Active
Account Associated View	Associated View	Default	Active
Account BulkOperation View	Associated View		Active
Account List Member View	Associated View		Active
Account Lookup View	Lookup View	Default	Active
Accounts Being Followed	Public View		Active
Accounts I Follow	Public View		Active

23. Click the “Add View” button and give your new view the name “**Active Hotels**” and then click “Create”.



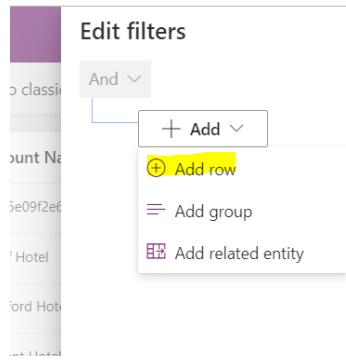
24. In the main view editor drag and drop the following fields into your new view : “**Account Name**”

(Will already be in there”, “**Account Number**”, “**Address 1: City**”, “**Address 1: County**”, “**Rating**”.

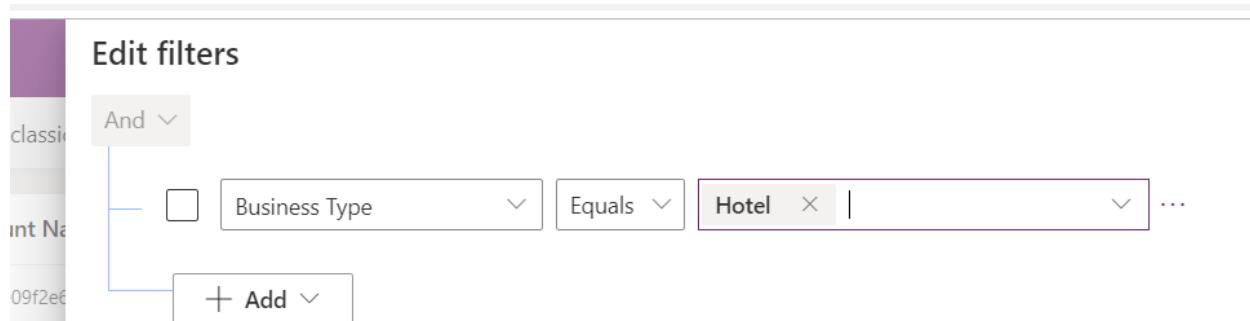
Account Name	Account Number	Address 1: City	Address 1: County	Rating
test_5e09f2e6-1b93-48c9-a795-d8e...				
Fourth Coffee (sample)	ABSS4G45	Renton		
Litware, Inc. (sample)	ACTBBDCC3	Dallas		
Adventure Works (sample)	ABC28UU7	Santa Cruz		
Fabrikam, Inc. (sample)	AFFSE9IK	Lynnwood		
Blue Yonder Airlines (sample)	ACSHN254	Los Angeles		
City Power & Light (sample)		Redmond		
Contoso Pharmaceuticals (sample)		Redmond		
Alpine Ski House (sample)	ABC09M32	Missoula		
A. Datum Corporation (sample)		Redmond		
Coho Winery (sample)	BABCO88H	Phoenix		
Microsoft				
A. Datum	AF3HN254	Guangzhou		
Adventure Works	ABSS4G45	Johannesburg		

25. You now need to add a filter to only show hotels. On the right select “Edit Filters”. Start by

adding a new row.



26. Select “Business Type” from the field list, “Equals” from the operator and “Hotel” from the optionset values.

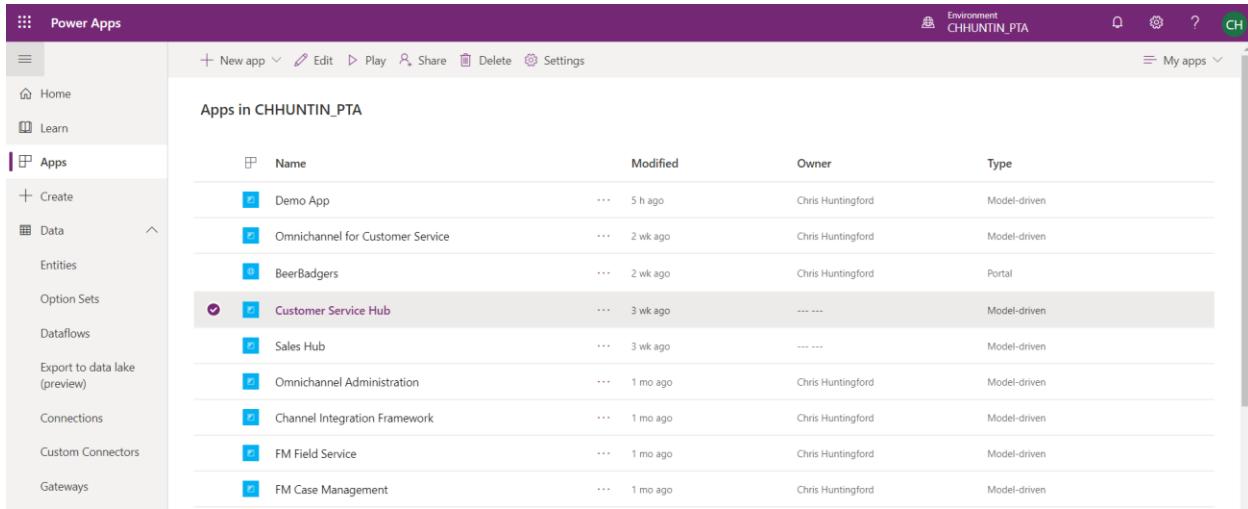


27. Select “Save” and then “Publish” to commit the changes.
28. Once you have completed these tasks you can navigate to “make.PowerApps.com” and prepare to import data.

# Step-by-Step 2: Importing Data to the Account Entity

Below are step by step instructions that will guide you through the solution. Here you will import the list of provided hotels into the Account entity. You will use the mapping functionality in the Data import Wizard to make sure data is imported to the correct fields.

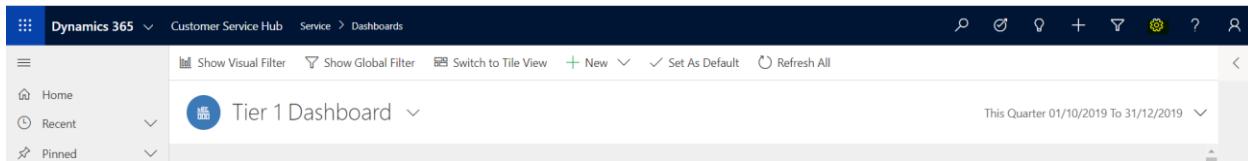
1. Navigate to “**Make.PowerApps.Com**” and select the “**Apps**” tab.



The screenshot shows the Microsoft Power Apps portal interface. The left sidebar has 'Power Apps' selected. Under 'Apps', 'Customer Service Hub' is highlighted with a purple background and a checkmark icon. The main area displays a table titled 'Apps in CHHUNTING\_PTA' with columns: Name, Modified, Owner, and Type. The 'Customer Service Hub' app is listed with a modified date of '3 wk ago' and owned by 'Chris Huntingford'. Other apps listed include Demo App, Omnichannel for Customer Service, BeerBadgers, Sales Hub, Omnichannel Administration, Channel Integration Framework, FM Field Service, and FM Case Management.

Name	Modified	Owner	Type
Demo App	5 h ago	Chris Huntingford	Model-driven
Omnichannel for Customer Service	2 wk ago	Chris Huntingford	Model-driven
BeerBadgers	2 wk ago	Chris Huntingford	Portal
<b>Customer Service Hub</b>	3 wk ago	Chris Huntingford	Model-driven
Sales Hub	3 wk ago	Chris Huntingford	Model-driven
Omnichannel Administration	1 mo ago	Chris Huntingford	Model-driven
Channel Integration Framework	1 mo ago	Chris Huntingford	Model-driven
FM Field Service	1 mo ago	Chris Huntingford	Model-driven
FM Case Management	1 mo ago	Chris Huntingford	Model-driven

2. Open the “**Customer Service hub**” App, then select the “**Settings Cog**”, then select “**Advanced Settings**”.



The screenshot shows the Dynamics 365 Customer Service Hub dashboard. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', 'Service', and 'Dashboards'. The left sidebar shows 'Home', 'Recent', and 'Pinned' sections. A blue circular icon indicates a pinned item, labeled 'Tier 1 Dashboard'. The main area displays a dashboard with a title 'Tier 1 Dashboard' and a subtitle 'This Quarter 01/10/2019 To 31/12/2019'.

3. You will be navigated to the classic administration interface.

Dynamics 365 | Settings | Business Management

Business Management

Which feature would you like to work with?

 <b>Fiscal Year Settings</b> Set the start date, template, and display options for the fiscal year and fiscal period used for tracking sales goals.	 <b>Goal Metrics</b> Define and manage the kinds of goals that your organization tracks.
 <b>Business Closures</b> Create a list of holidays and other times when the business is closed.	 <b>Facilities/Equipment</b> Add facilities and equipment for service scheduling. Change information about resources or delete existing resources.
 <b>Queues</b> Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and update.	 <b>Resource Groups</b> Add new groups and new members to existing groups for service scheduling. Update group information and delete groups or group members.
 <b>Sales Territories</b> Create new sales territories and assign territory managers. Add and remove members, modify territory information, and delete territories.	 <b>Services</b> Add new services for service scheduling. Change service information and deactivate existing services.
 <b>Sites</b> Create new sites or office locations where service operations take place. Add and remove resources, change site information, or delete sites.	 <b>Subjects</b> Manage the subject hierarchy for your organization's products, literature, and articles.
 <b>Currencies</b> Add new currencies or change the exchange rates for existing currencies.	 <b>Connection Roles</b> Create, edit, and delete the standard labels used to define connections between records.
 <b>Relationship Roles</b> Manage the standard labels users can apply when they define relationship roles between accounts, contacts, and opportunities.	 <b>Automatic Record Creation and Update Rules</b> Create and manage rules for automatic record creation and updates. You can set up rules for either out-of-the-box entities or custom entities.
 <b>Rollup Queries</b> Go to your list of Rollup Queries that you can use to gather data about a group of related records.	 <b>LinkedIn Sales Navigator</b> Manage settings relating to LinkedIn Sales Navigator Integration

#### 4. Navigate to “Settings | Data Management”.

Dynamics 365 | Settings | Data Management

Data Management

What would you like to do?

 <b>Duplicate Detection Settings</b> Select default duplicate detection settings for your organization.	 <b>Duplicate Detection Rules</b> Create, modify and publish duplicate detection rules.
 <b>Duplicate Detection Jobs</b> Create and monitor duplicate detection jobs.	 <b>Bulk Record Deletion</b> Manage bulk record-deletion jobs.
 <b>Data Maps</b> Create, import, and export data maps used during import.	 <b>Imports</b> Import data and view the status of imports in progress.
 <b>Templates for Data Import</b> Download a template for Data import.	 <b>Sample Data</b> Add sample data to the system, or delete existing sample data.
 <b>Add Ready-to-Use Business Processes</b> Add business processes that are ready to use and designed for common sales, service, and marketing scenarios.	 <b>Data Encryption</b> Check the encryption status, and change or activate the encryption key.
 <b>Export Field Translations</b> Export translatable text for the localizable fields in the application	 <b>Import Field Translations</b> Import translated text for the localizable fields in the application.
 <b>Similar Records Suggestions Settings</b> Set up and manage automatic suggestion of similar records using the Azure Machine Learning Text Analytics service and search.	

#### 5. Select “imports” from the menu

Dynamics 365 | Settings | Data Management

X DELETE | EMAIL A LINK | EXCEL TEMPLATES | EXPORT TO EXCEL | IMPORT DATA

My Imports

Import Name	Status Reason	Success...	Partial Failure...	Errors	Total Pr...	Created On	Created By
Sample Data Phone Call	Completed	10	0	25	35	27/10/2019 1...	Chris Hunting...
Sample Data UoMSchedule	Completed	1	0	0	1	27/10/2019 1...	Chris Hunting...
Comma Data 1.txt	Completed	1	0	0	1	27/10/2019 1...	Chris Hunting...

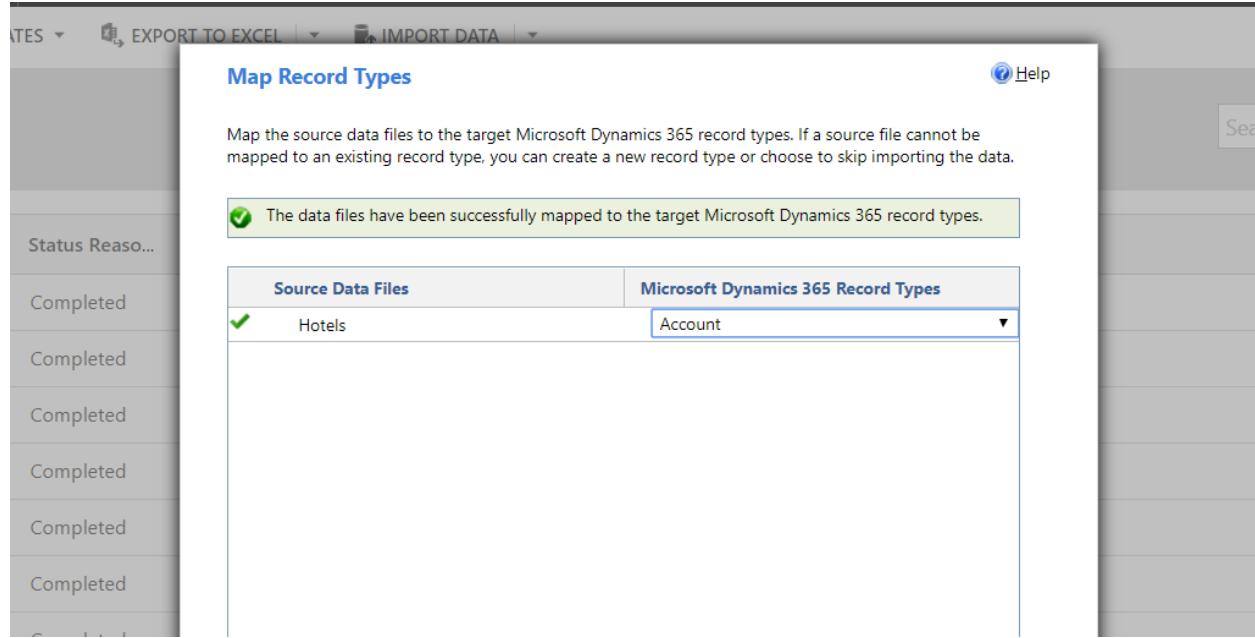
6. Navigate to where you saved the “hotels.csv” file and select it, Then select “Next”.

The screenshot shows the Microsoft Dynamics 365 Data Management interface. On the left, there's a list titled "My Imports" with 24 entries, all completed. The main area is a "Upload Data File" dialog box. It has a "Choose File" button with "Hotels.csv" selected, and a note that supported file types are XML Spreadsheet 2003 (.xml), .csv, .txt, .xlsx, and .zip. Below the file input is a cloud icon with an upward arrow and the text "Drag your file here". At the bottom right of the dialog are "Next" and "Cancel" buttons. The status bar at the bottom shows "0 0 13 13 27/10/2019 1... Chris Hunting...".

7. Review the File Summary and then select “next”.

The screenshot shows the "Review File Upload Summary" dialog box. It displays a message "The following data will be imported into Microsoft Dynamics 365." followed by a summary table. The table has two columns: "File Name" and "Size". One row is shown: "Hotels.csv" and "2 KB". Below the table is a section titled "Delimiter Settings" with a "▶" icon. The background shows a partial view of the "PLATES" list, which includes rows for "Status Reason", "Completed", and "Completed".

8. Map Hotels to “Account” and select “next”.



9. Map the following Data source fields to the following Dynamics 365 Attributes, then select "next" to import.

EXPORT TO EXCEL | IMPORT DATA | Help

### Map Fields

Select the Microsoft Dynamics 365 record type and map each source field to a target Microsoft Dynamics 365 field. We suggest that you map all the required fields before you click Next.

All the record types with fields have been successfully mapped.

Dynamics 365 Record Types	Source Fields	Dynamics 365
✓ Account	Show All ▾	
<b>Required Fields</b>		
Name	Account Name	
<b>Optional Fields</b>		
Account Number	Account Number	
Business Type		Business Type (Option Se
City	Address 1: City	
Country	Address 1: County	
postcode	Address 1: ZIP/Postal Co	
Rating	Rating	

Back Next Cancel

10. Review the Mapping Summary and select “Next”.

EXPORT TO EXCEL | IMPORT DATA | Help

### Review Mapping Summary

The data from the source files has been successfully mapped to the target record types and fields in Microsoft Dynamics 365. The data is ready to import.

Source Data Files	Microsoft Dynamics 365 Record Types
✓ Hotels.csv	Account

11. Review the settings and import Data by selecting “Submit”.

EXPORT TO EXCEL | IMPORT DATA |

## Review Settings and Import Data

Review the default settings, make the necessary changes, and submit the data for import.

**Allow Duplicates**

No  
 Yes

Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics 365.

**Select Owner for Imported Records**

Chris Huntingford

This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.

**Data Map Name (optional)**

Save this data map for future imports.

**Buttons:** Back, Submit, Cancel

0 0 13 27/10/2019 1... Chris Hunting...

12. Complete the data import by selecting “Finish”.

EXPORT TO EXCEL | IMPORT DATA |

## Data Submitted for Import

Your data has been submitted for import.  
To check the status of the import, go to Settings > Data Management > [Imports](#)

13. Review the Data import in the “imports” list. There should be 25 records that are created.

My Imports							
	Import Name	Status Reason	Success Rate	Partial Failure Rate	Errors	Total Progress	Created On
<input type="checkbox"/>	Hotels.csv	Completed	25	0	0	25	09/12/2019 2...
<input type="checkbox"/>	Hotels.csv	Completed	23	0	2	25	09/12/2019 2...
<input type="checkbox"/>	Hotels.csv	Submitted	0	0	0	0	09/12/2019 2...
<input type="checkbox"/>	Sample Data Phone Call	Completed	10	0	25	35	27/10/2019 1...
<input type="checkbox"/>	Sample Data UoMSchedule	Completed	1	0	0	1	27/10/2019 1...
<input type="checkbox"/>	Sample Data UoM	Completed	1	0	0	1	27/10/2019 1...

14. Navigate back to your “Customer Service Hub” application and then select the “Accounts” from the menu. Select the “Active Hotels” view and you will see your list of Hotels.

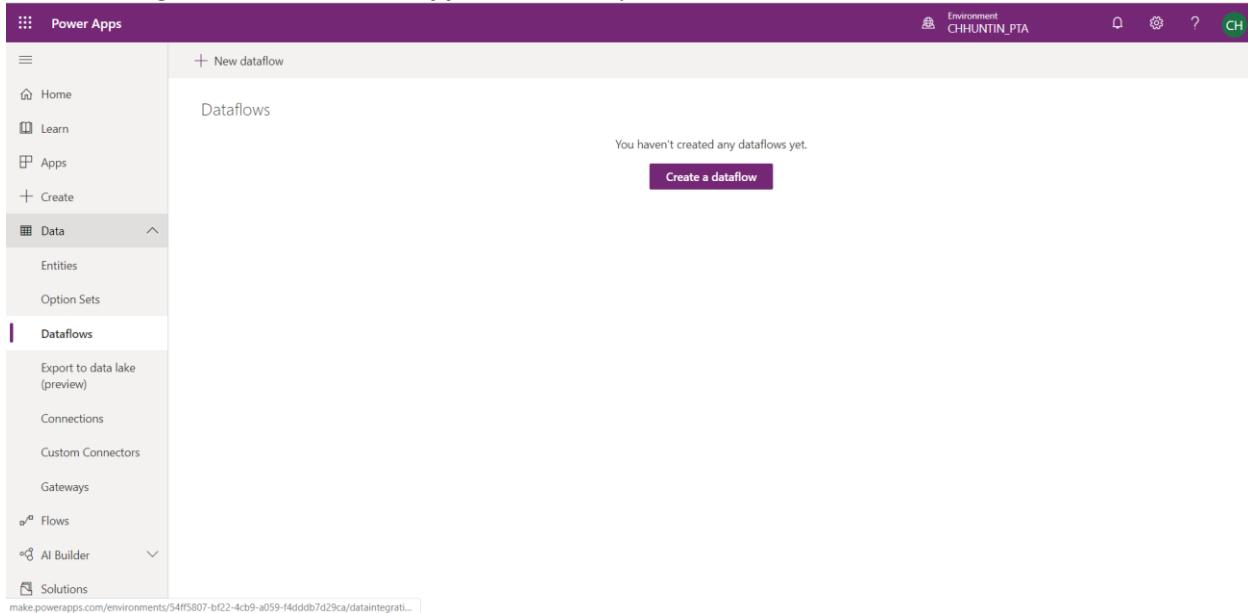
The screenshot shows the Dynamics 365 Customer Service Hub interface. The left sidebar navigation includes Home, Recent, Pinned, My Work, Dashboards, Activities, Customers (selected), Accounts (highlighted in blue), Contacts, Social Profiles, Service, Cases, Queues, and Knowledge Articles. The main content area displays a list of 'Active Hotels' with columns: Account Name, Account Number, Address 1: City, Address 1: County, and Rating. A search bar at the top right says 'Search for records'. The list contains the following data:

	Account Name	Account Number	Address 1: City	Address 1: County	Rating
	Crieff Hotel	123456	Crieff	---	1
	Romford Hotel	123457	Romford	---	2
	Tranent Hotel	123458	Tranent	---	9
	Stockton-on-Tees Hotel	123459	Stockton-on-Tees	---	5
	London Hotel E3	123460	London	---	5
	Carmarthen Hotel	123461	Carmarthen	---	9
	Otley Hotel	123462	Otley	---	7
	Looe Hotel	123463	Looe	---	8
	Gunnislake Hotel	123464	Gunnislake	---	9
	Truro Hotel	123465	Truro	---	10
	Liverpool Hotel	123466	Liverpool	---	9
	York Hotel	123467	York	---	2

# Step-by-Step 3: Importing Complaints

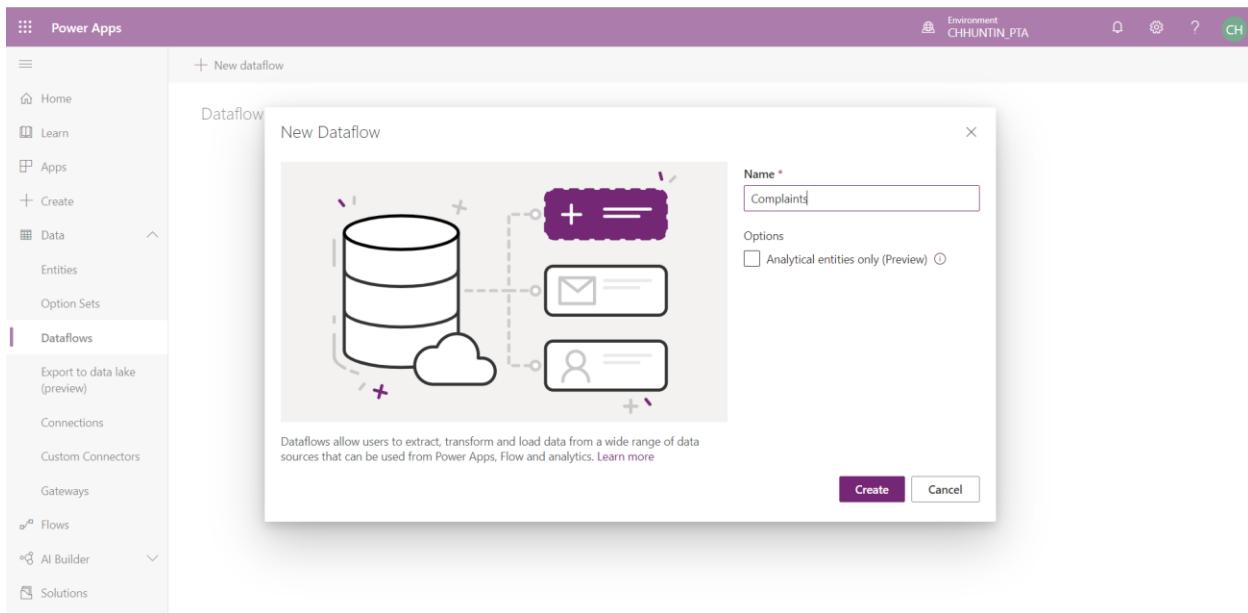
Below are step by step instructions that will guide you through the solution. Here you will use the Data Flow functionality available within the Power Platform to import a custom entity and its associated data.

1. Navigate to “[make.PowerApps.com](#)” and open the “Data” tab, then select “Data Flows”.



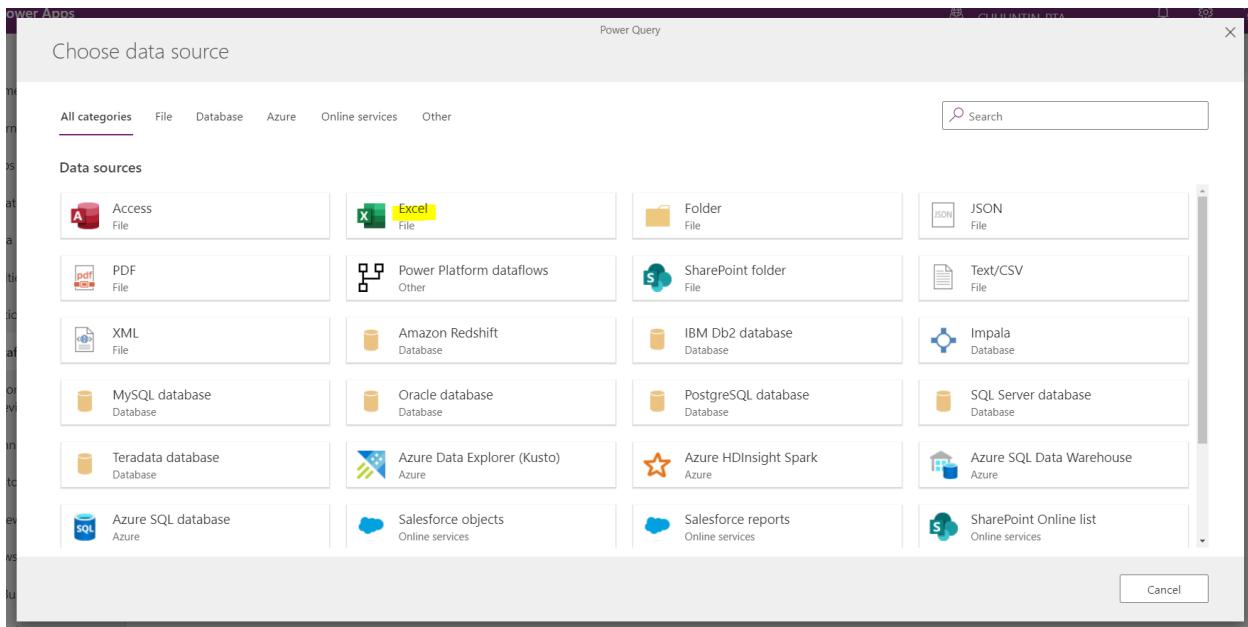
The screenshot shows the Power Apps interface with the 'Data' tab selected. Under 'Dataflows', it says 'You haven't created any dataflows yet.' and features a prominent 'Create a dataflow' button.

2. Select “Create a Dataflow” and give your dataflow the name “Complaints”, then select “Create”.



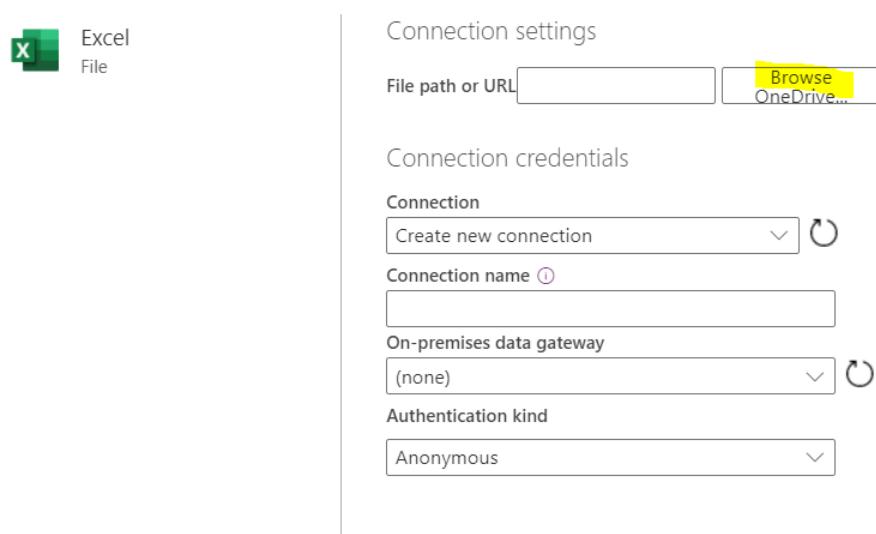
The screenshot shows the 'New Dataflow' dialog box. It has a central canvas with icons for a database, cloud, and two boxes labeled 'Email' and 'Person'. On the right, there's a 'Name' field with 'Complaints' typed in, and an 'Options' section with a checkbox for 'Analytical entities only (Preview)'. At the bottom are 'Create' and 'Cancel' buttons.

3. Select “Excel” from the list of options.



4. Select “browse OneDrive” to locate your file.

Connect to data source



5. A One Drive repository will be exposed to you. Select the “Upload | Files” option and navigate to where you stored the “Complaints.XLS” file.

The screenshot shows a Microsoft OneDrive interface in a web browser. At the top, there's a header bar with the title "Files - OneDrive - Google Chrome". Below the header is a navigation bar with "New folder" and "Upload" buttons. A dropdown menu is open over the "Upload" button, showing options "Files" and "Folder". The main area is titled "Files" and contains a table listing various Excel files. The columns are "Name", "Modified", "Modified By", "File Size", "Sharing", and "Activity". The files listed are:

Name	Modified	Modified By	File Size	Sharing
Customer Service Bootcamp	2 days ago	Chris Huntingford		Shared
Assset Incident Logging V2.xlsx	November 5	Chris Huntingford	219 KB	Private
CG Complaints.xlsx	November 21	Chris Huntingford	103 KB	Private
Complaints02.xlsx	October 20	Chris Huntingford	16.3 MB	Private
Complaints1000.xlsx	November 5	Chris Huntingford	201 KB	Private
ComplaintsTags.xlsx	October 21	Chris Huntingford	2.64 MB	Private
Leads05.xlsx	November 5	Chris Huntingford	165 KB	Private
LeadsDataExcel.xlsx	August 27	Chris Huntingford	15.7 KB	Private
Prospects.xlsx	September 4	Chris Huntingford	31.0 KB	Private
scrubbed03.xlsx	November 20	Chris Huntingford	1.18 MB	Private

At the bottom right of the main area are "Open" and "Cancel" buttons. Below the main area is a sidebar titled "Quick access" containing links to "Desktop", "Downloads", and "OneDrive". To the right of the sidebar is a smaller table showing two selected files: "Complaints" and "Hotels".

Name	Status	Date modified	Type	Size
Complaints	🕒	09/12/2019 22:18	Microsoft Excel W...	67 KB
Hotels	🕒	09/12/2019 21:56	Microsoft Excel Co...	2 KB

6. The Complaints file will be uploaded to OneDrive, Select “Open” to continue the process.

## Files

Name	Modified	Modified By	File Size	Sharing	Activity
Customer Service Bootcamp	2 days ago	Chris Huntingford		Shared	
Asset Incident Logging V2.xlsx	November 5	Chris Huntingford	219 KB	Private	
CG Complaints.xlsx	November 21	Chris Huntingford	103 KB	Private	
Complaints.xlsx	A few seconds ...	Chris Huntingford	66.8 KB	Private	
Complaints02.xlsx	October 20	Chris Huntingford	16.3 MB	Private	
Complaints1000.xlsx	November 5	Chris Huntingford	201 KB	Private	
ComplaintsTags.xlsx	October 21	Chris Huntingford	2.64 MB	Private	
Leads05.xlsx	November 5	Chris Huntingford	165 KB	Private	
LeadsDataExcel.xlsx	August 27	Chris Huntingford	15.7 KB	Private	
Prospects.xlsx	September 4	Chris Huntingford	31.0 KB	Private	

**Open**

**Cancel**

7. The file will then be loaded from source, click “next” to continue.

Power Query

Connect to data source

Excel File

Connection settings

File path or URL

Connection credentials

Connection

Authentication kind: Organizational account

Back

8. You will now be navigated to the “Power Query” screen. Select the “Complaints” table and select “Transform Data” to continue.

Choose data

Power Query

Complaints

ABC Column1	ABC Column2	ABC Column3	ABC Column4	ABC Column5	ABC Column6	ABC Column7
Unique ID	Complaint Description	Category	Date logged	Origin	Stage	Sub S
20	Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Social	Stage 4	Comp
24	Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Chat	Stage 4	Decis
56	Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Web	Stage 4	Close
92	Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Phone	Stage 4	Acknc
136	Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Web	Stage 4	Decis
316	Filth Rooms and dirty beds	Unacceptable Accomodation	7/1/2019	Web	Stage 4	Acknc
408	Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Letter	Stage 4	In Prc
440	Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Social	Stage 4	Comp
480	Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Social	Stage 4	Decis
492	Filth Rooms and dirty beds	Unacceptable Accomodation	7/1/2019	Phone	Stage 4	In Prc
496	Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Phone	Stage 4	Comp
524	Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Chat	Stage 4	Comp
612	Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Phone	Stage 4	Decis
660	Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Phone	Stage 4	In Prc
676	Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Web	Stage 4	Decis
700	Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Social	Stage 4	Close
760	Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Phone	Stage 4	Decis
772	Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Phone	Stage 4	In Prc
792	Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Phone	Stage 4	Acknc
800	Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Social	Stage 4	In Prc

Back Cancel Transform data

9. You will navigate to the Data Transformation wizard in Power Query where we will now transform the way I which the data is imported into the Common Data Service Entity structure.

Edit queries

Queries < Complaints

Source[[Item = "Complaints", Kind = "Sheet"]][Data]

ABC Column1	ABC Column2	ABC Column3	ABC Column4	ABC Column5	ABC Column6
2	20 Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Social	S1
3	24 Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Chat	S1
4	56 Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Web	S1
5	92 Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Phone	S1
6	136 Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Web	S1
7	316 Filth Rooms and dirty beds	Unacceptable Accomodation	7/1/2019	Web	S1
8	408 Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Letter	S1
9	440 Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Social	S1
10	480 Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Social	S1
11	492 Filth Rooms and dirty beds	Unacceptable Accomodation	7/1/2019	Phone	S1
12	496 Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Phone	S1
13	524 Filth Rooms and dirty beds	Unacceptable Accomodation	8/1/2019	Chat	S1
14	612 Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Phone	S1
15	660 Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Phone	S1
16	676 Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Web	S1
17	700 Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Social	S1
18	760 Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Phone	S1
19	772 Filth Rooms and dirty beds	Unacceptable Accomodation	4/1/2019	Phone	S1
20	792 Filth Rooms and dirty beds	Unacceptable Accomodation	12/1/2019	Phone	S1

Query settings Name: Complaints  
Applied steps Source > Navigation

Next

10. Firstly, we will make sure that the first row is used as the headers. Navigate to “Transform Table” and select “Use First Row as headers”.

Edit queries

The screenshot shows the Power Query Editor interface. On the left, there's a 'Queries' pane with a single item named 'Complaints'. The main area displays a table with two columns: 'ABC 123 Column1' and 'ABC 123 Column2'. The data consists of several rows of complaints. To the right of the table is a ribbon of transformation steps: 'Source{[Item = "Complaints", Kind = "Sheet"]}', 'Group by', 'Use first row as headers', 'Use headers as first row' (which is highlighted with a yellow box), 'Transpose', 'Reverse rows', 'Count rows', 'Reduce rows', 'Add column', 'Go to column', 'Combine tables', and 'Transform table'. On the far right, there's a 'Query settings' pane with 'Name' set to 'Complaints' and an 'Applied steps' section containing 'Source' and 'Navigation'.

11. This will update the table as well as the “**Applied steps**” on the right-hand side.

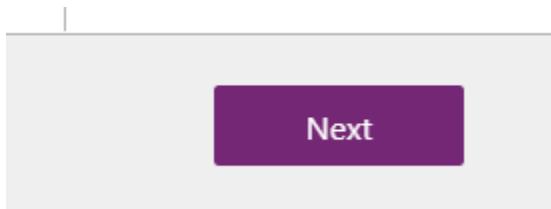
Edit queries

This screenshot shows the same Power Query Editor interface after applying the 'Promoted headers' step. The table now has four columns: '123 Unique ID', 'Complaint Description', 'Category', and 'Date logged'. The 'Complaint Description' column contains the original text from the first row. The 'Category' column contains the word 'Unacceptable Accommodation' repeated for each row. The 'Date logged' column contains the date '8/1/2019'. The 'Origin' column is empty. The 'Applied steps' pane on the right now includes 'Promoted headers' along with 'Source' and 'Navigation'.

12. You will notice that the field types have been updated for you so that when the creation of the fields and import of the data is done the field types will be as accurate as possible. This will not work for Optionsets and lookups just yet.

A close-up screenshot of the Power Query interface showing the 'Next' button, which is part of the 'Process' or 'Load' dialog.

13. To process, click the “**next**” button.



14. The “**Map Entities**” screen will be displayed. Please follow the exact process shown in the screen below selecting the appropriate options. Make sure to “Load to a new Entity” is selected. This will create a brand new entity in the Common Data Service.

Map entities

<b>Queries</b>	<b>Load settings</b>	<b>Field mapping</b>
Complaints	<input type="radio"/> Load to existing entity <input checked="" type="radio"/> Load to new entity <input type="radio"/> Do not load	Key fields: crf8f_UniqueID Primary name field: Category Source column Destination field Destination field type Category crf8f_Category Multiline text Closed date crf8f_Closeddate Date only Closed Successfully crf8f_ClosedSuccessfully Two options Complaint Description crf8f_ComplaintDescription Multiline text Customer Satisfaction crf8f_CustomerSatisfaction Whole number Date logged crf8f_Datelogged Date only Origin crf8f-Origin Multiline text Stage crf8f_Stage Multiline text
<input checked="" type="checkbox"/> Delete rows that no longer exist in the query output		
		<a href="#">Back</a> <a href="#">Cancel</a> <a href="#">Next</a>

15. You now need to select the relevant data types for the fields. Make sure all fields are selected as “Text” except for the description which needs to be “Multiline Text”.

Map entities

<b>Queries</b>	<b>Load settings</b>	<b>Field mapping</b>
Complaints	<input type="radio"/> Load to existing entity <input checked="" type="radio"/> Load to new entity <input type="radio"/> Do not load	Key fields: crf8f_UniqueID Primary name field: Category Source column Destination field Destination field type Category crf8f_Category Text Closed date crf8f_Closeddate Date only Closed Successfully crf8f_ClosedSuccessfully Two options Complaint Description crf8f_ComplaintDescription Multiline text Customer Satisfaction crf8f_CustomerSatisfaction Whole number Date logged crf8f_Datelogged Date only Origin crf8f-Origin Text Stage crf8f_Stage Text Sub Status crf8f_SubStatus Text Unique ID crf8f_UniqueID Whole number Within SLA crf8f_WithinSLA Two options
<input checked="" type="checkbox"/> Delete rows that no longer exist in the query output		
		<a href="#">Back</a> <a href="#">Cancel</a> <a href="#">Next</a>

16. Once completed with the field type mapping select “Next” to progress the import.
17. You will progress to a “Refresh Settings” page, make sure this is set to “Refresh Manually” and select “Create”.

Refresh settings

Refresh manually  
 Refresh automatically

Cancel Create

18. This will run through the process of bringing in the data.

Load Progress

Complaints

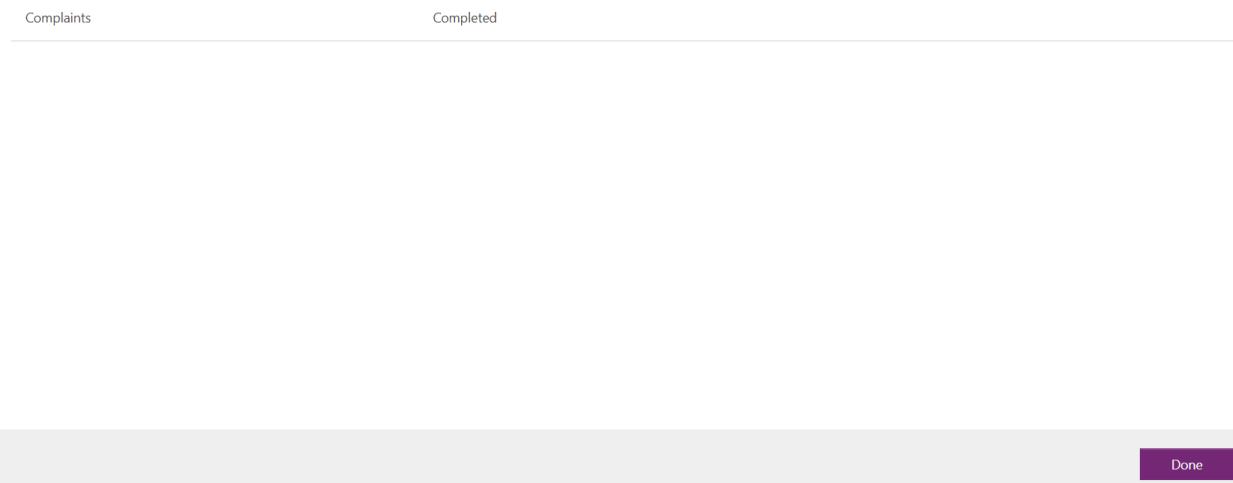
Creating entity

• •

Done

19. Once completed the “**Done**” button will be enabled and you will see a success message. To progress select “**Done**”

## Load Progress



20. And navigate to “Data | Entities” and select “Complaints” to view your new entity.

The screenshot shows the 'Entities' list in the Microsoft Dynamics 365 Data | Entities screen. The 'Complaints' entity is highlighted with a yellow background. The list includes various entities such as Account, Address, Appointment, Asset / Facility, Attachment, Building, Business Unit, Contact, Currency, and Email. The 'Complaints' entity is listed under the 'Business Unit' category.

Entity ↑	Name ↓	Type ↓	Customiza... ↓	Tags ↓
Account	account	Standard	✓	Master
Address	customeraddress	Standard	✓	Standard
Appointment	appointment	Standard	✓	Productivity
Asset / Facility	tdg.assetfacility	Custom	✓	Custom
Attachment	activitymimeattachment	Standard	✓	Productivity
Building	tdg_building	Custom	✓	Custom
Business Unit	businessunit	Standard	✓	Standard
Complaints	cr8bf_complaints	Custom	✓	Custom
Contact	contact	Standard	✓	Master
Currency	transactioncurrency	Standard	✓	Standard
Email	email	Standard	✓	Productivity

21. Select the “Data” tab to view the relevant records.



# Step-by-Step 4: Configuring the Complaint functionality.

Below are step by step instructions that will guide you through the solution. Here you will be updating Forms, Views and graphs by leveraging the functionality within the Common Data Service.

1. Navigate to the “Forms” tab within the “Complaints” entity.

Entities > Complaints

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

Model-driven

Name ↑	Form type ↴	Type ↴
Information	... Main	Custom
Information	... QuickViewForm	Custom
Information	... Card	Custom

2. Open the “Information” form. You will notice that there are very few fields that have been added to the form.

Power Apps | Form

+ Add Field + Add Component Undo Redo Cut Paste | Delete Switch to classic

Save Publish

Fields

Complaints

Search Default

+ New field

Show only unused fields

Closed date  
Closed Successfully  
Complaint Description  
Created By  
Created By (Delegate)  
Created On  
Customer Satisfaction  
Date logged  
Modified By  
Modified By (Delegate)  
Modified On  
Origin  
Stage  
Status

New Complaints

General

Category

Owner

Chris Hartinghoff

Information

Entity Complaints

Display Name Information

Description A form for this entity.

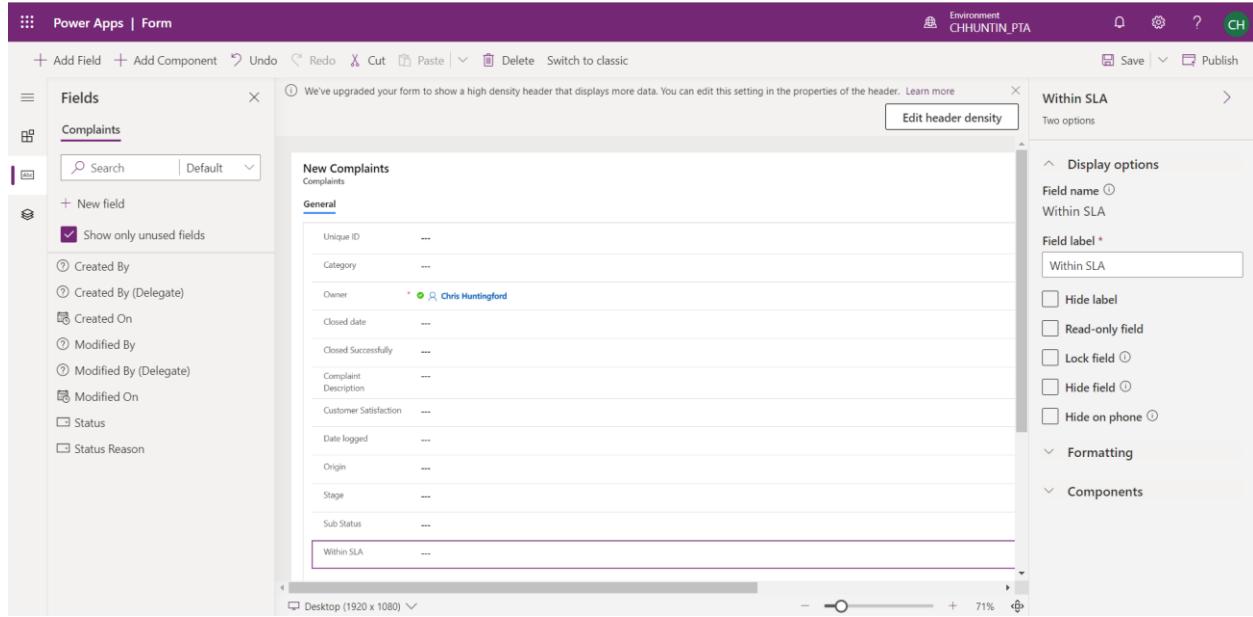
Max Width (pixels) 1920

Show image

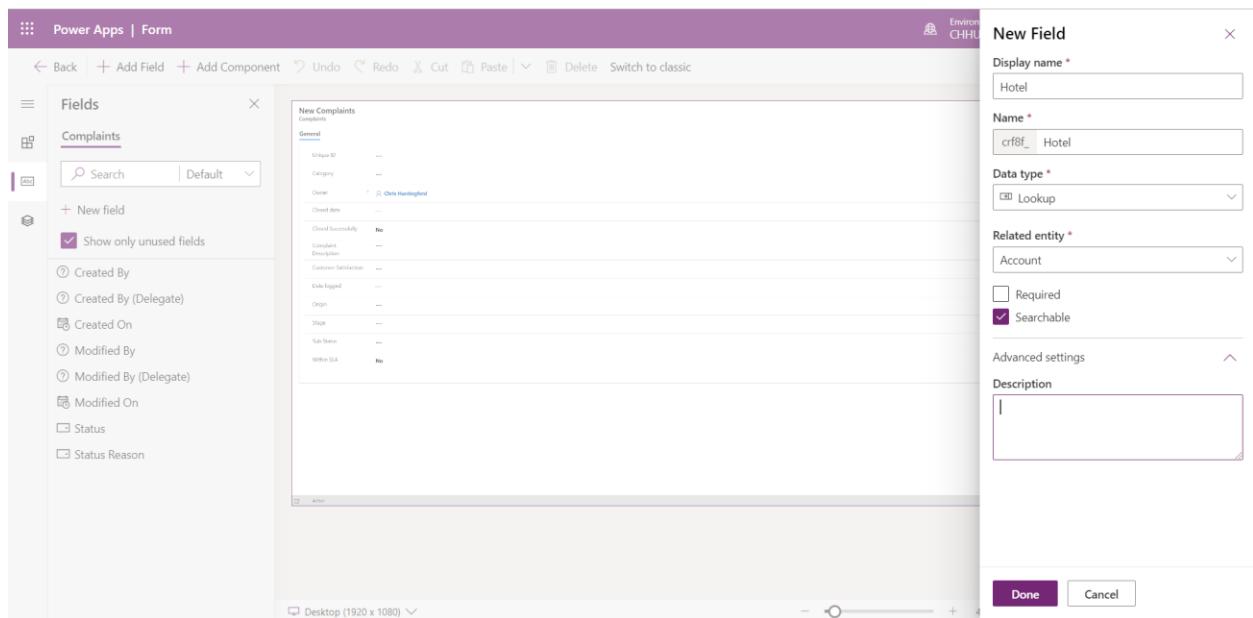
Edit header density

Environment CHHUNIN\_PTA

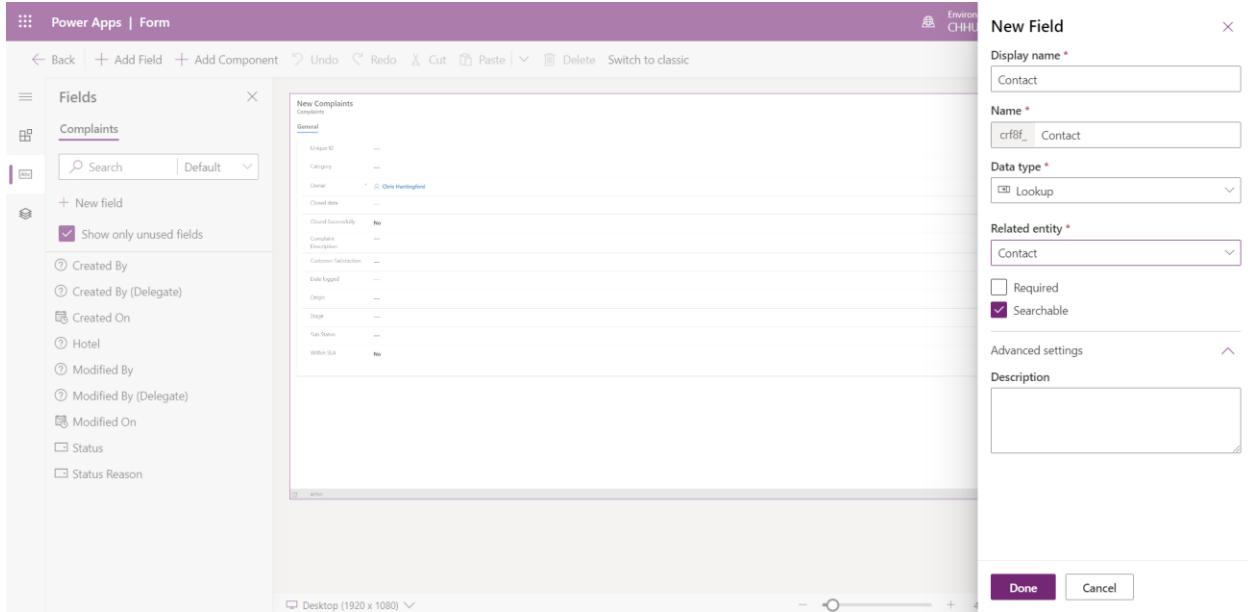
3. Drag and drop the fields shown below onto the form in which ever order you would prefer.



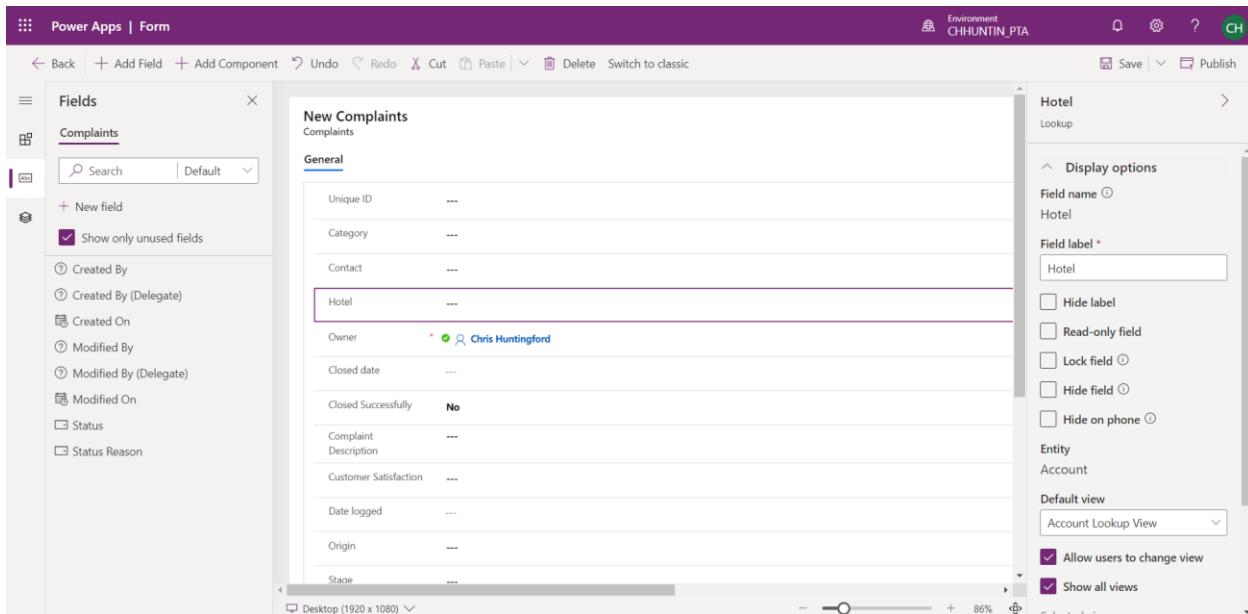
4. In the Field explorer on the left of the form select “New Field”. Give the field the following metadata:



5. Click “New Field” once again and do the sale form “Contact” remembering to make sure the lookup is directed to the CONTACT entity:



6. Drag and drop the “Hotel” and “Contact” fields onto the form.



7. To save this select “Save” and the “Publish” the form.

8. Navigate back to “[Make.PowerApps.com](#)”, select “Data | Entities” and open the “Complaints” entity. Navigate to the “Views” Tab.

Name	View type	Status	Type
Active Complaints	Public View Default	Active	Standard
Complaints Advanced Find View	Advanced Find View Default	Active	Standard
Complaints Associated View	Associated View Default	Active	Standard
Complaints Lookup View	Lookup View Default	Active	Standard
Inactive Complaints	Public View	Active	Standard
Quick Find Active Complaints	Quick Find View Default	Active	Standard

9. Open the “Active Complaints” view. You will see very few columns in the view.

10. Drag and drop the following columns into the view: “**Unique ID**”, “**Category**” (Will already be there), “**Created On**” (Will already be there”), “**Contact**”, “**Hotel**”, “**Origin**”, “**Date Logged**”, “**Customer Satisfaction**” & “**Stage**”.

The screenshot shows the Power Apps Studio interface for creating a new view. The left sidebar shows the 'Fields' section for the 'Complaints' entity, with various filters applied like 'Status is Active' and 'Category is Action of staff affecting an individual'. The main area displays a table of 'Active Complaints' with columns: Unique ID, Category, Created On, Contact, Hotel, Origin, Date logged, Customer Satisfaction, and Stage. All entries in the table are currently set to Stage 1.

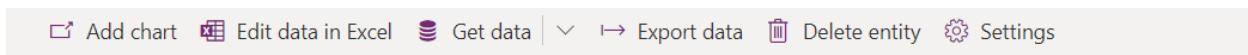
11. Click “Save” and then “Publish”.

12. Select the “back” button to navigate back to the complaints entity.

13. Select the “Data” tab and you will see your newly created view.

Entities > Complaints							
Fields	Relationships	Business rules	Views	Forms	Dashboards	Charts	Keys
<u>Data</u>							
Unique ID	Category	Created On	Origin	Date logged	Customer Satisfaction	Stage	
57	Action of staff affecti...	09/12/2019 22:44	Phone	01/09/2019	4	Stage 1	
77	Action of staff affecti...	09/12/2019 22:44	Phone	01/05/2019	1	Stage 1	
97	Action of staff affecti...	09/12/2019 22:44	Phone	01/01/2019	2	Stage 1	
117	Action of staff affecti...	09/12/2019 22:44	Phone	01/09/2019	4	Stage 1	
157	Action of staff affecti...	09/12/2019 22:44	Phone	01/01/2019	4	Stage 1	
197	Action of staff affecti...	09/12/2019 22:44	Phone	01/05/2019	4	Stage 1	
237	Action of staff affecti...	09/12/2019 22:44	Phone	01/09/2019	1	Stage 1	
257	Action of staff affecti...	09/12/2019 22:44	Phone	01/05/2019	4	Stage 1	
277	Action of staff affecti...	09/12/2019 22:44	Phone	01/01/2019	4	Stage 1	
297	Action of staff affecti...	09/12/2019 22:44	Phone	01/09/2019	4	Stage 1	
357	Action of staff affecti...	09/12/2019 22:44	Phone	01/09/2019	4	Stage 1	
337	Action of staff affecti...	09/12/2019 22:44	Phone	01/01/2019	4	Stage 1	
397	Action of staff affecti...	09/12/2019 22:44	Phone	01/07/2019	4	Stage 1	
377	Action of staff affecti...	09/12/2019 22:44	Phone	01/05/2019	2	Stage 1	

14. Navigate to the “Charts” tab in the “Complaints” entity. You will see that there are no charts available. Select the “Add Chart” button.



## Entities > Complaints

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

Model-driven

Name ↑

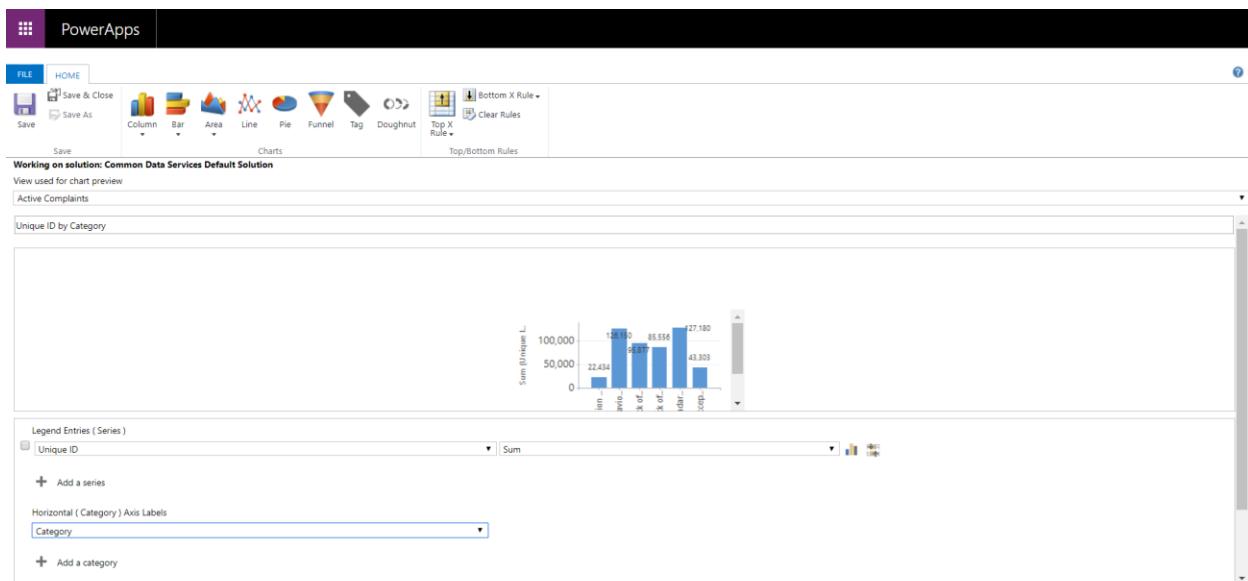
Type ↓



We didn't find anything to show here

There's nothing here. Try creating something new.

15. The classic Chart Designer will appear... Create a chart by selecting the “**Legend**” as “**Unique ID**” and the “**horizontal**” as “**Category**”. Then select “**Save & Close**” from the menu.



16. You will see your new chart available in the list. Select “Add Chart” to create a new chart.



Entities > Complaints

Fields Relationships Business rules Views Forms Dashboards Charts Keys Data

Model-driven

Name ↑

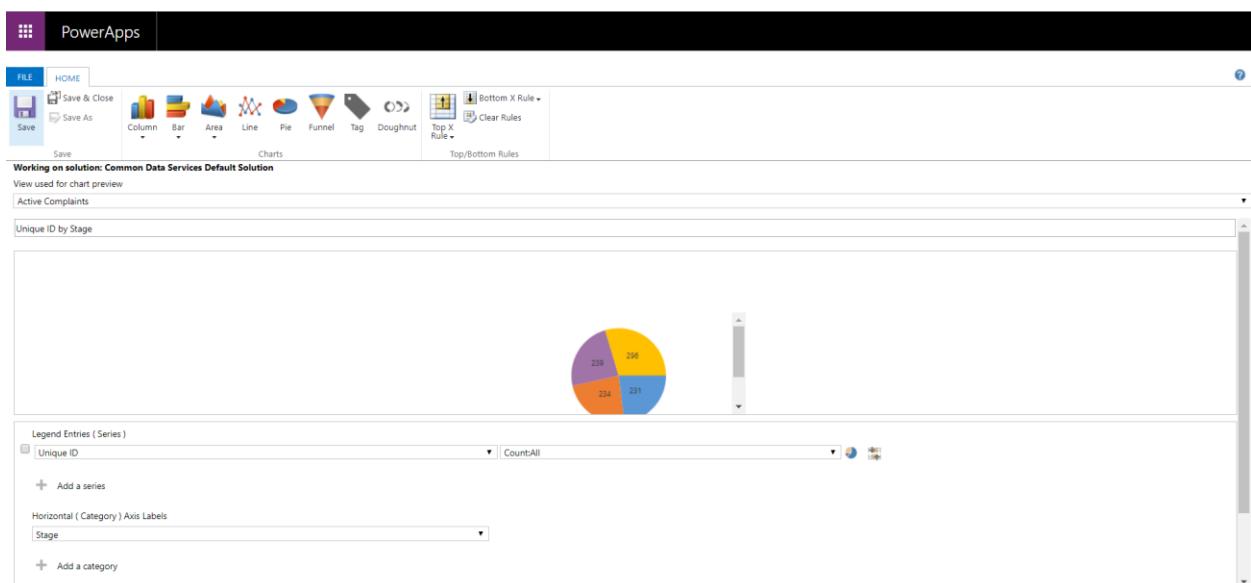
Type ↓

Unique ID by Category

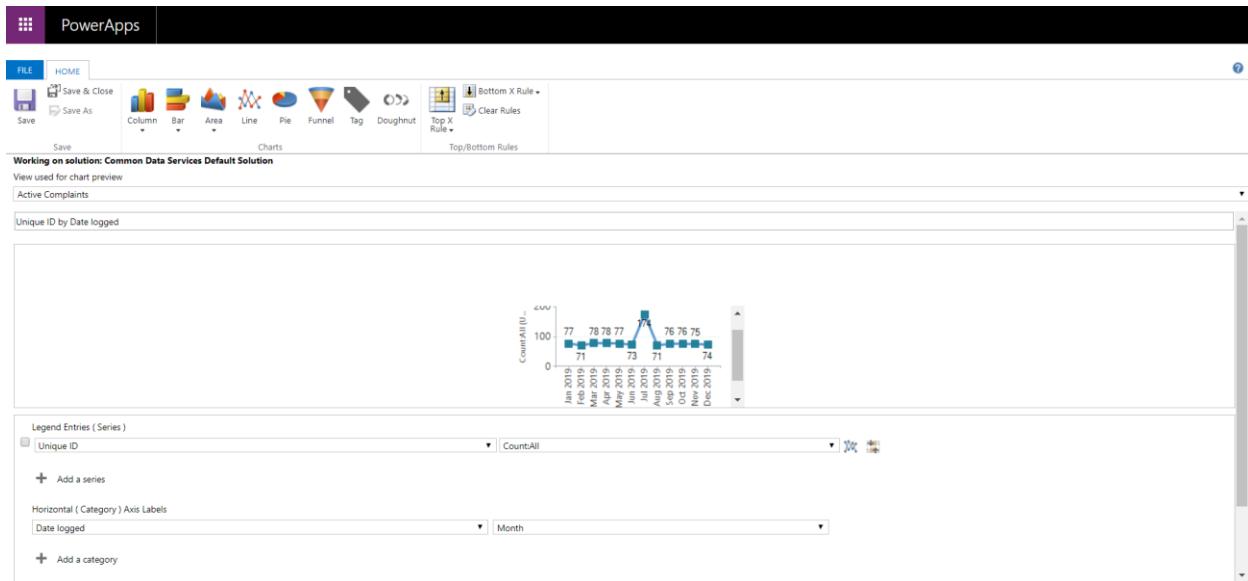
... Custom

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

17. This time select the pie chart option from the chart list. Select “**Legend**” as “**Unique ID**” and the “**horizontal**” as “**Stage**”. Then select “**Save & Close**” from the menu.



18. You will see your second chart created in the list. For the last time select “Add Chart”. Make this chart a Line Chart then Select “**Legend**” as “**Unique ID**” and the “**horizontal**” as “**Date Logged**”. Then select “**Save & Close**” from the menu.



19. You should now have 3 charts in your list in the Common Data Service.

Entities > Complaints

Fields Relationships Business rules Views Forms Dashboards Charts Keys Data

Name ↑ Type ↓

Name	Type
Unique ID by Category	Custom
Unique ID by Date logged	Custom
Unique ID by Stage	Custom

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

# Step-by-Step 5: Creating a Business process Flow

Below are step by step instructions that will guide you through the solution. Here you will leveraging the Business Process Flow functionality within Power Automate to create a Business Process flow for your Complaint entity

1. Navigate to “make.PowerApps.Com” and navigate to “Flows”.

The screenshot shows the Power Apps interface with the 'Flows' section selected. On the left, there's a navigation bar with options like Home, Learn, Apps, Create, Data, Entities, Option Sets, Dataflows, Export to data lake (preview), Connections, Custom Connectors, Gateways, and Flows (which is highlighted). The main area is titled 'Flows' and has tabs for 'My flows' (selected), Team flows, Business process flows, and UI flows (preview). A central message says 'You don't have any flows' and encourages choosing from 100s of templates. Below this are four cards for PowerApps templates:

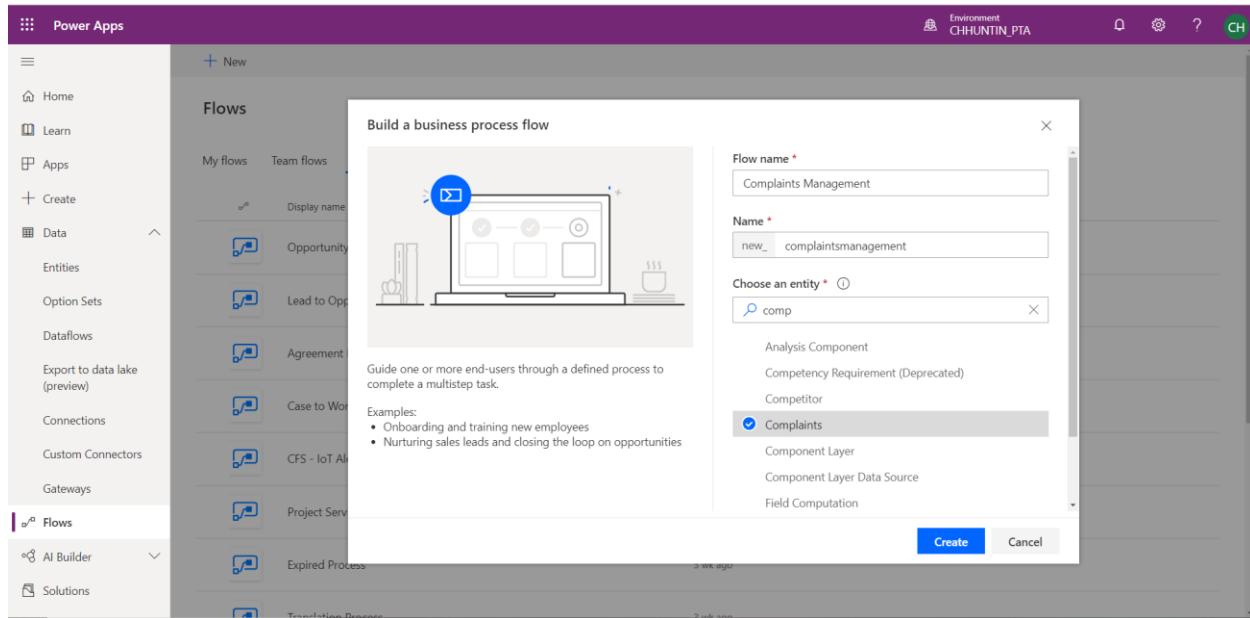
Template	Created By	Last Modified
Save Office 365 email attachments to OneDrive for Business	By Microsoft	Automated 309296
Get today's weather forecast for my current location	By Microsoft	Instant 201011
Get a push notification when you receive an email from your boss	By Microsoft	Automated 150836
Send a customized email when a new file is added	By Microsoft	Automated 100821

2. Navigate to the “Business Process Flow” tab and you will be able to see all of the current business process flows that have already been created.

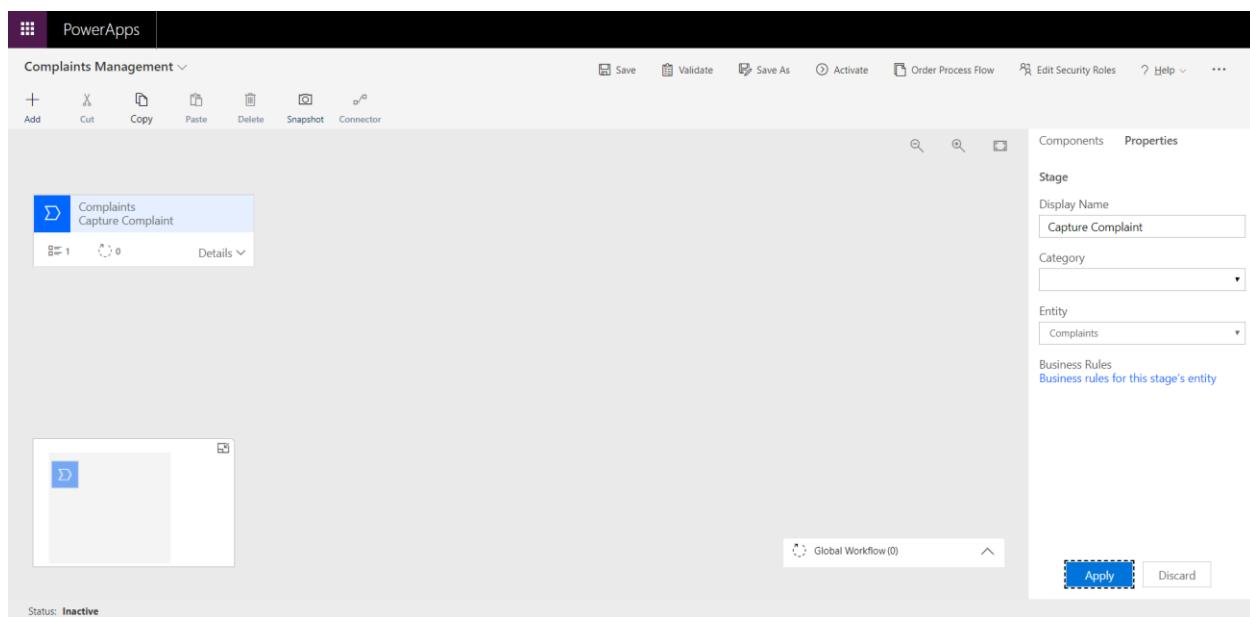
The screenshot shows the same Power Apps interface as before, but with the 'Business process flows' tab selected in the top navigation. The list of flows includes:

Flow Name	Last Modified
Opportunity Sales Process	2 d ago
Lead to Opportunity Sales Process	2 d ago
Agreement Business Process	3 wk ago
Case to Work Order Business Process	3 wk ago
CFS - IoT Alert Process Flow	3 wk ago
Project Service - Project Stages	3 wk ago
Expired Process	3 wk ago

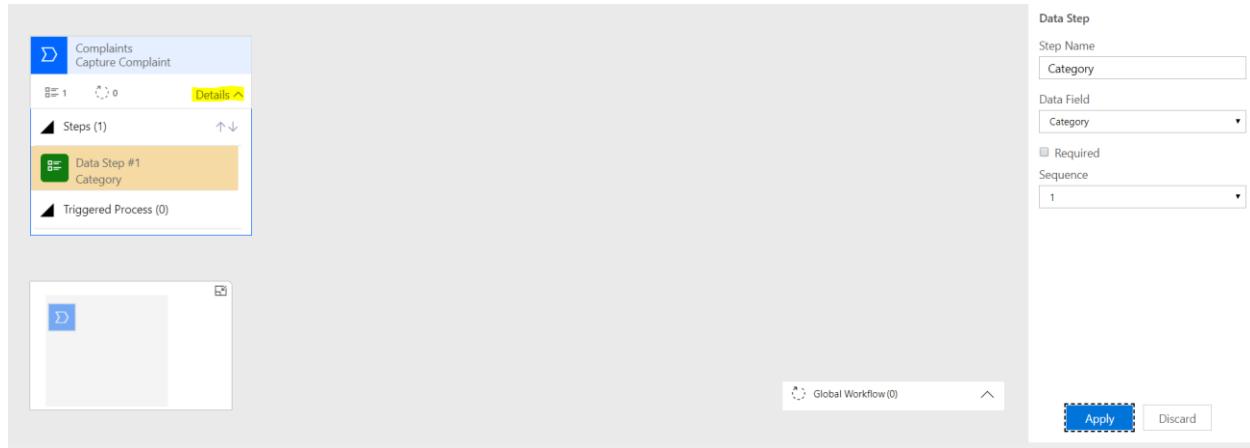
3. To create a new Business Process Flow select the “New” button, give your process the name “**Complaints Management**” and select the “**Complaints**” entity from the list.



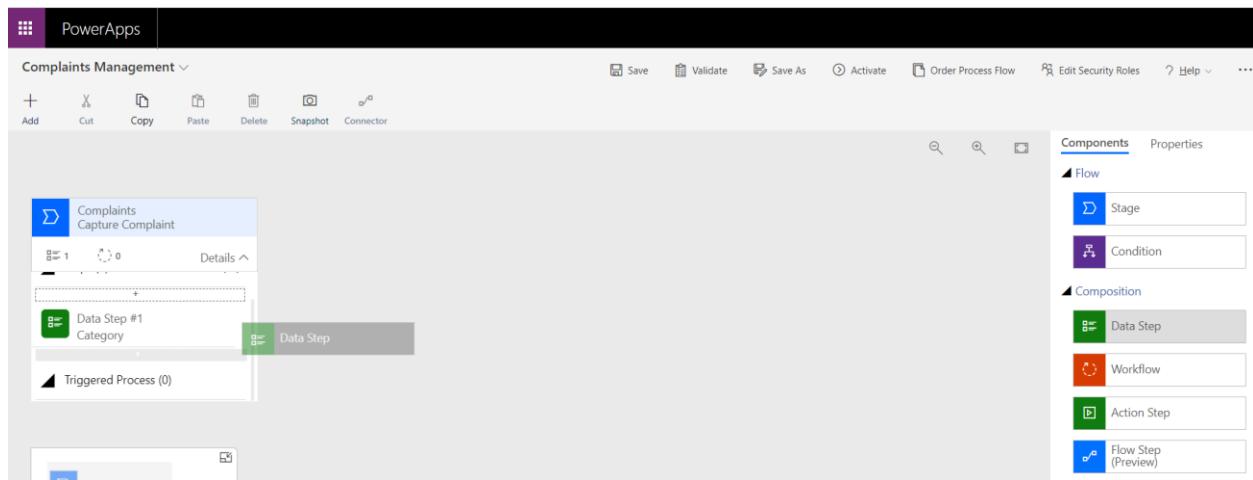
4. You will be navigated to the Business Process Flow editor. Here you can drag and drop components onto the process form to create your Business Process flow. Firstly click on the first Component and edit the Display name. **PLEASE CLICK THE APPLY BUTTON TO SAVE THIS CHANGE.**



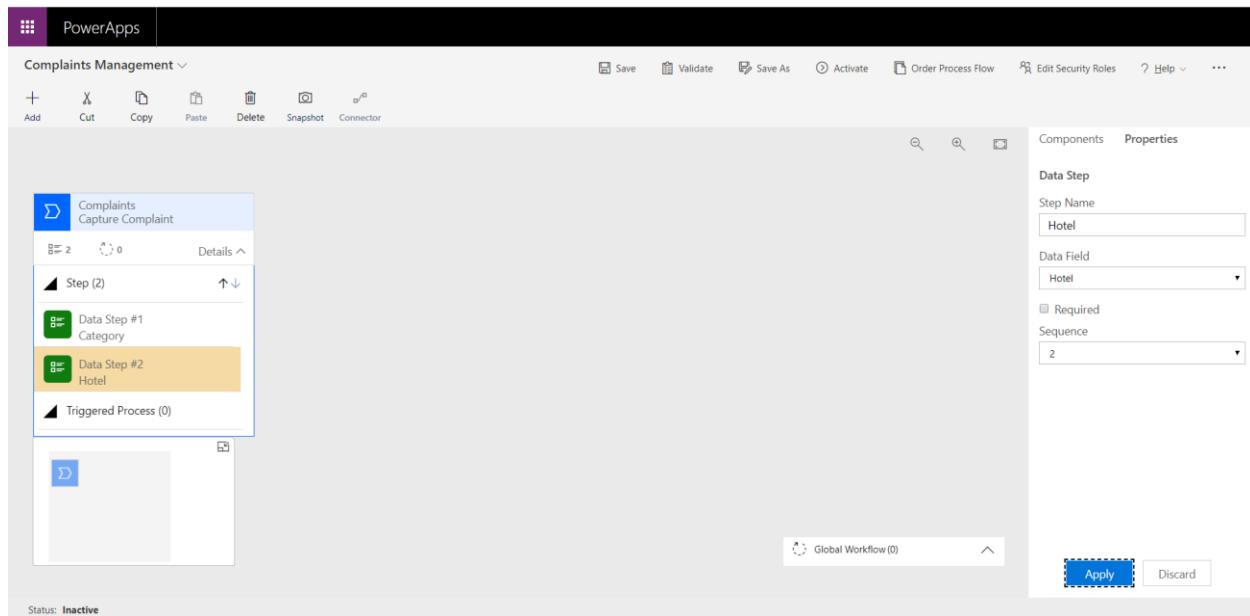
- Click the “Details” toggle on the “Capture Complaint” component and the data steps will be made visible. Click on the data step and on the right under the properties menu, select the “Category” field. **CLICK APPLY TO SAVE THESE CHANGES.**



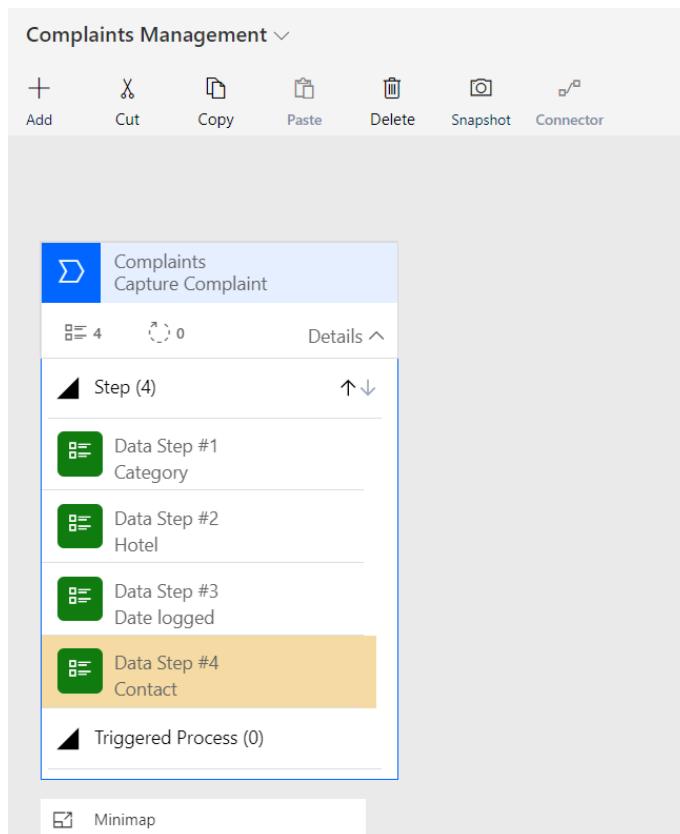
- To add a new data step component drag and drop the component over from the components list into the stage component in the process form.



- Select the Hotel option and then select apply to save the changes.



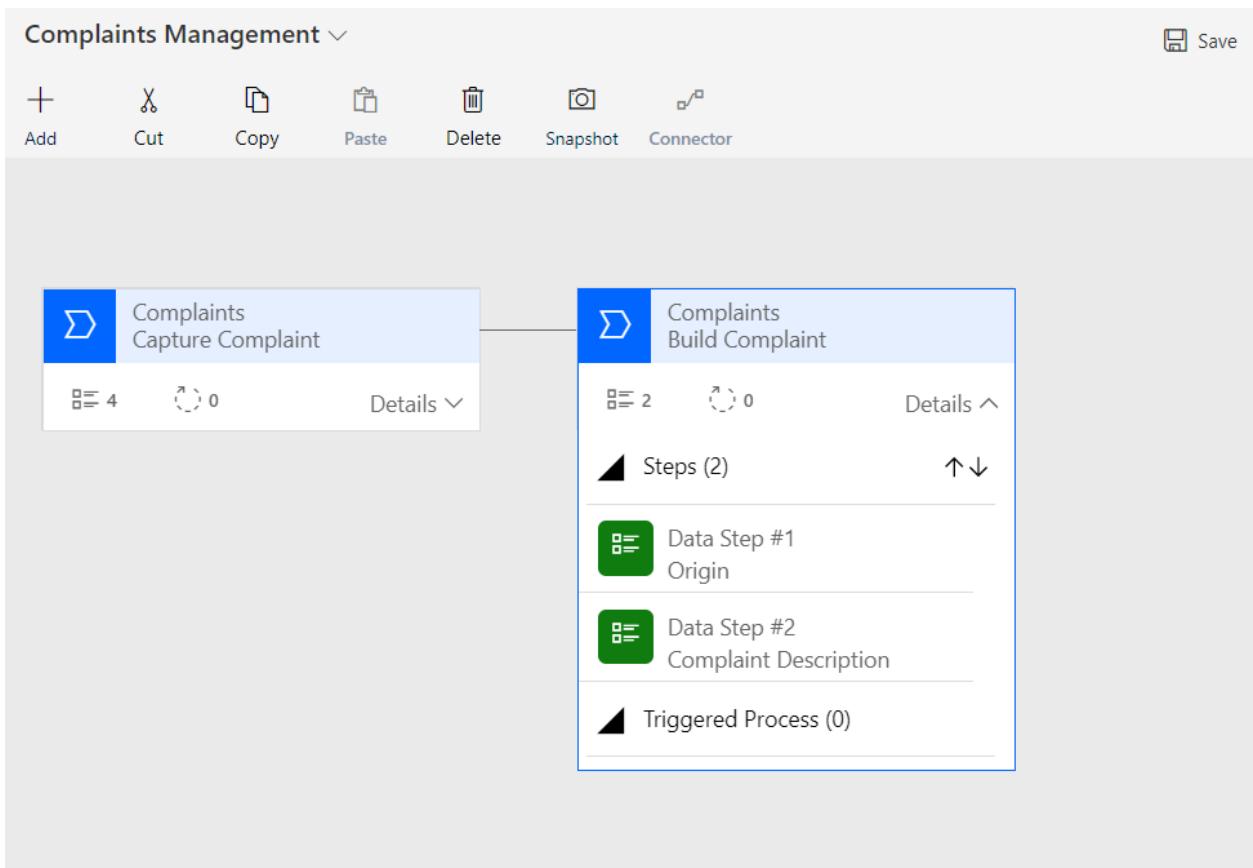
8. Follow the same steps as above for the following fields: “**Date Logged**” & “**Contact**”.



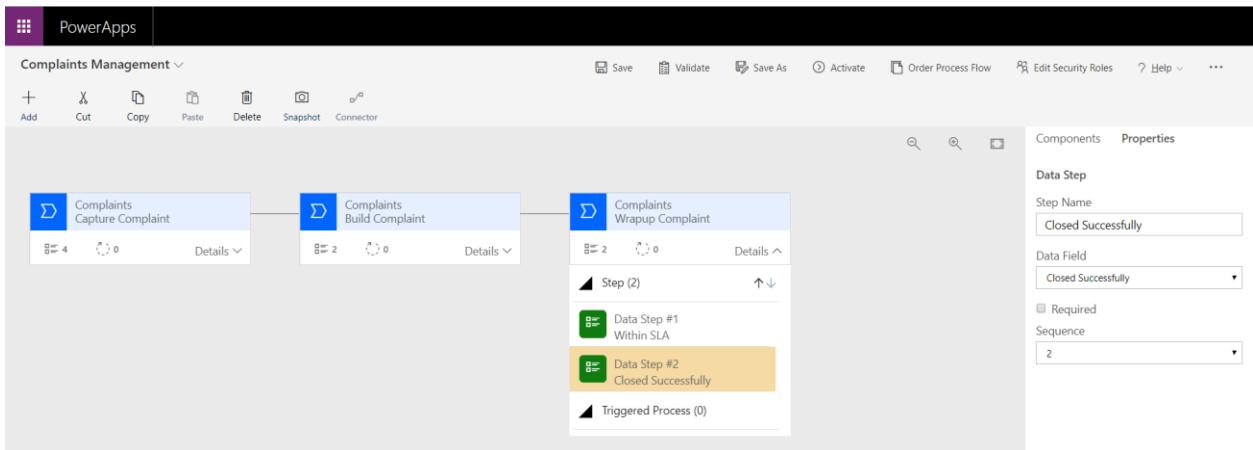
9. Next you need to drag a “**new Stage**” component onto the form to attach to the “**Capture Complaint**” component. To do this navigate to Components on the right and drag the stage across.



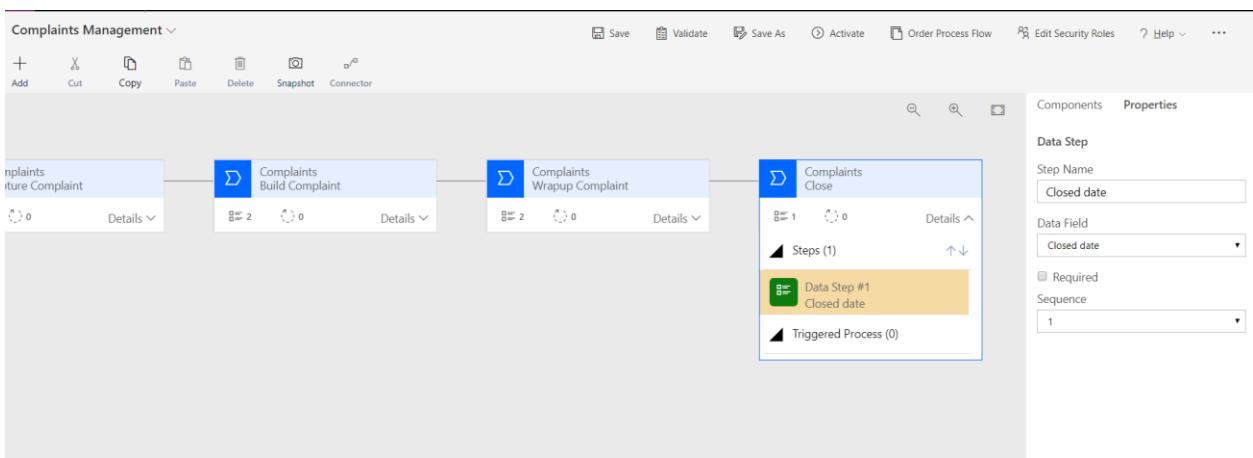
10. In the next step name the stage “**Build Complaint**” and then add data steps for “**Complaint Description**” and “**Origin**”.



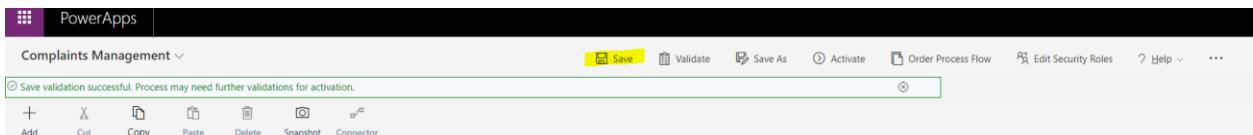
11. Add another stage called “**Wrapup Complaint**” and add data steps for “**Within SLA**” and “**Closed Successfully**”.



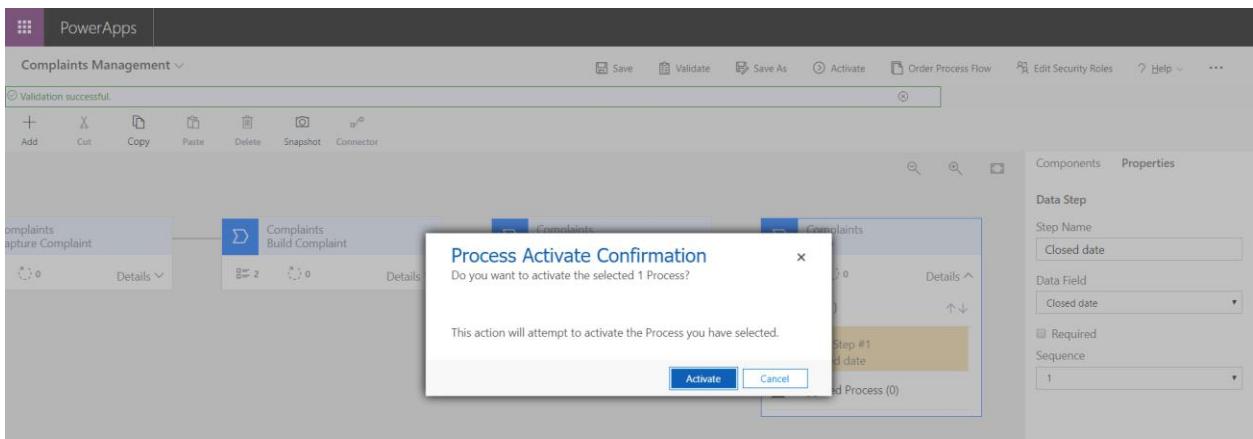
12. Add a final step called “Close” And add 1 data step for “Closed Date”.



13. Save your complaint Process



14. Activate your complaint Process



15. Once your complaint process has been activated you can now close the tab and you will see  
your complaint process in the list.

A screenshot of the Microsoft PowerAutomate (formerly Flow) interface. The top navigation bar includes 'New', 'Flows', 'My flows', 'Team flows', 'Business process flows' (which is underlined), and 'UI flows (preview)'. Below this, a table lists four business process flows: 'Complaints Management' (last modified 1 min ago), 'Opportunity Sales Process' (2 d ago), 'Lead to Opportunity Sales Process' (2 d ago), and a partially visible fourth item. Each row shows a small thumbnail icon, the flow name, and the last modified timestamp.

# Step-by-Step 6: Creating a Model Driven App

Below are step by step instructions that will guide you through the solution. Here you will leverage the complaints and Accounts functionality you have added within a Model Driven application to manage complaints for each hotel.

1. Navigate to “[Make.PowerApps.com](#)” and select “**Apps**” from the menu. You will see your Dynamics 365 applications in the list.

Name	Modified	Owner	Type
Demo App	7 h ago	Chris Huntingford	Model-driven
Omnichannel for Customer Service	2 wk ago	Chris Huntingford	Model-driven
Customer Service Hub	3 wk ago	Chris Huntingford	Model-driven
Sales Hub	3 wk ago	Chris Huntingford	Model-driven
Omnichannel Administration	1 mo ago	Chris Huntingford	Model-driven
Channel Integration Framework	1 mo ago	Chris Huntingford	Model-driven
FM Field Service	1 mo ago	Chris Huntingford	Model-driven
FM Case Management	1 mo ago	Chris Huntingford	Model-driven
New Facilities	1 mo ago	Chris Huntingford	Canvas
Facilities Management	1 mo ago	Chris Huntingford	Model-driven
Project Service	1 mo ago	Chris Huntingford	Model-driven
Solution Health Hub	1 mo ago	Chris Huntingford	Model-driven

2. Select “New App” and then “Model Driven”

New app

Import canvas app

Microsoft Dynamics 365

Canvas

Model-driven

Portal

3. Give your app the name “Hotel Complaints Management” and click the “Done” button in the top right.

Create a New App

Create and publish your own app in minutes. You can start simple and add more components later.

Name :*	Hotel Complaints Management	Done	Cancel
Unique Name :*	crf8f_HotelComplaintsManagement		
Description:	Hotel Complaints Management	App Tile:	
Icon:	<input checked="" type="checkbox"/> Use Default Image		
Unified Interface URL:	https://chrishuntingford01.crm11.dynamics.com/Apps/uniqueName/crf8f_HotelComplaintsManagement	Hotel Complaints Manage...	
	<input type="checkbox"/> Use existing solution to create the App	Hotel Complaints Management	
	<input type="checkbox"/> Choose a welcome page for the app		
	<input type="checkbox"/> Enable Mobile Offline		

4. You will be navigated to the Model app designer.

PowerApps

App Designer  
Hotel Complaints Management

Last Saved on 09/12/2019 23:57 \*Draft

Add Edit Remove Search Canvas

Configuration Missing

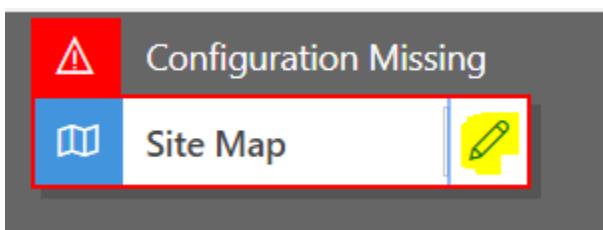
Site Map

Save Save And Close Validate Publish Play

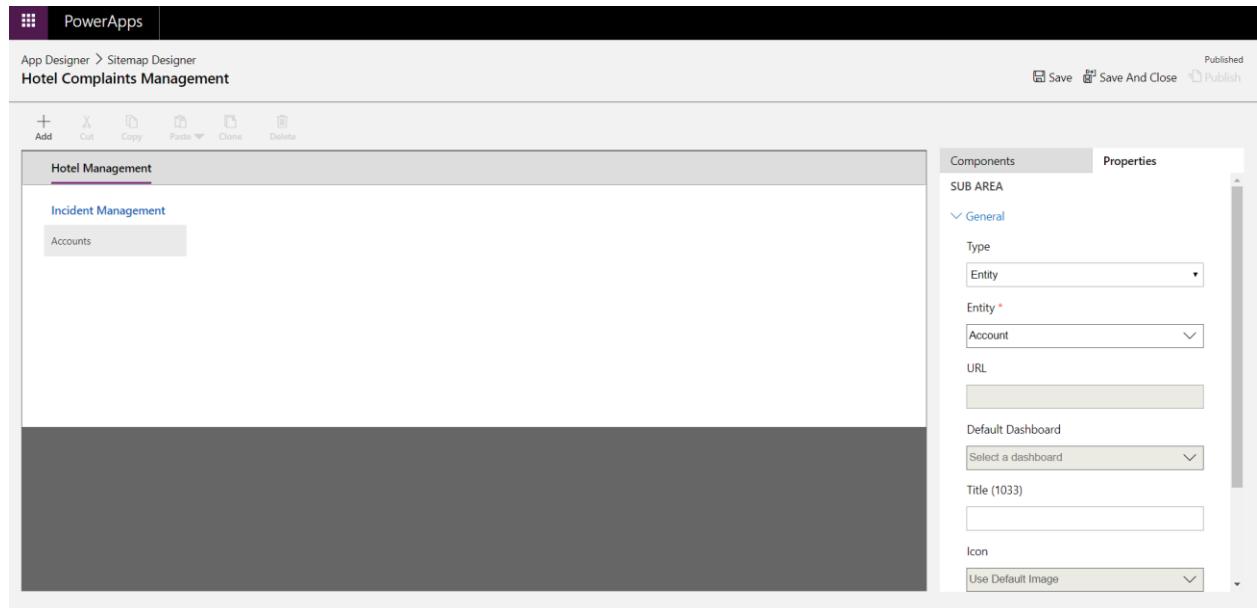
Components Properties

- ARTIFACTS
  - Entities Model and manage business da... >
  - Dashboards Provide an insightful and graphi... >
  - Business Process Flow Define a sequence of steps rea... >
- ENTITY ASSETS
  - Forms Define how users will see and in... >
  - Views Create a list view of records for ... >
  - Charts Show data in a meaningful and ... >
  - Dashboards Provide an insightful and graphi... >

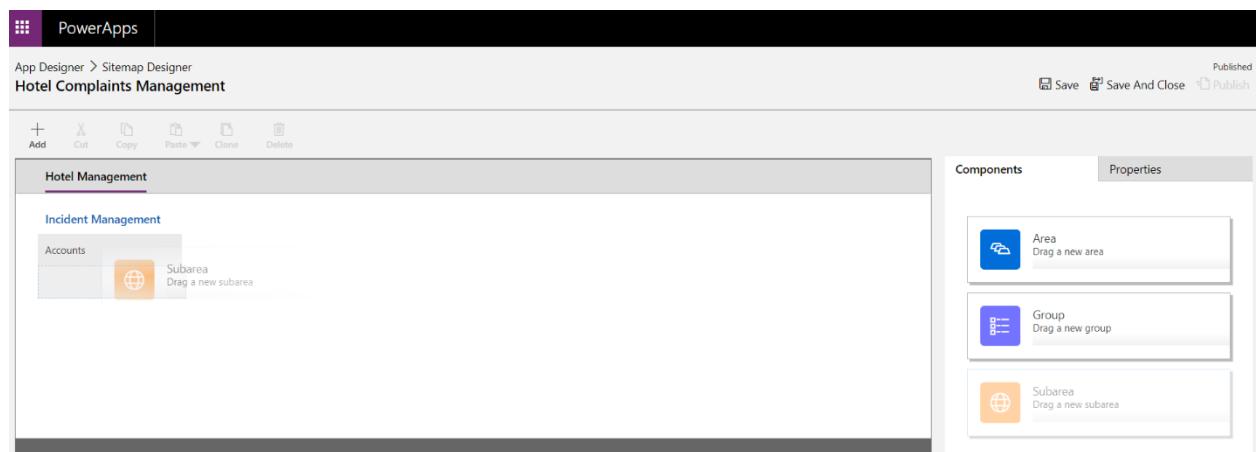
5. Select the pencil icon on the right of the “Site Map”



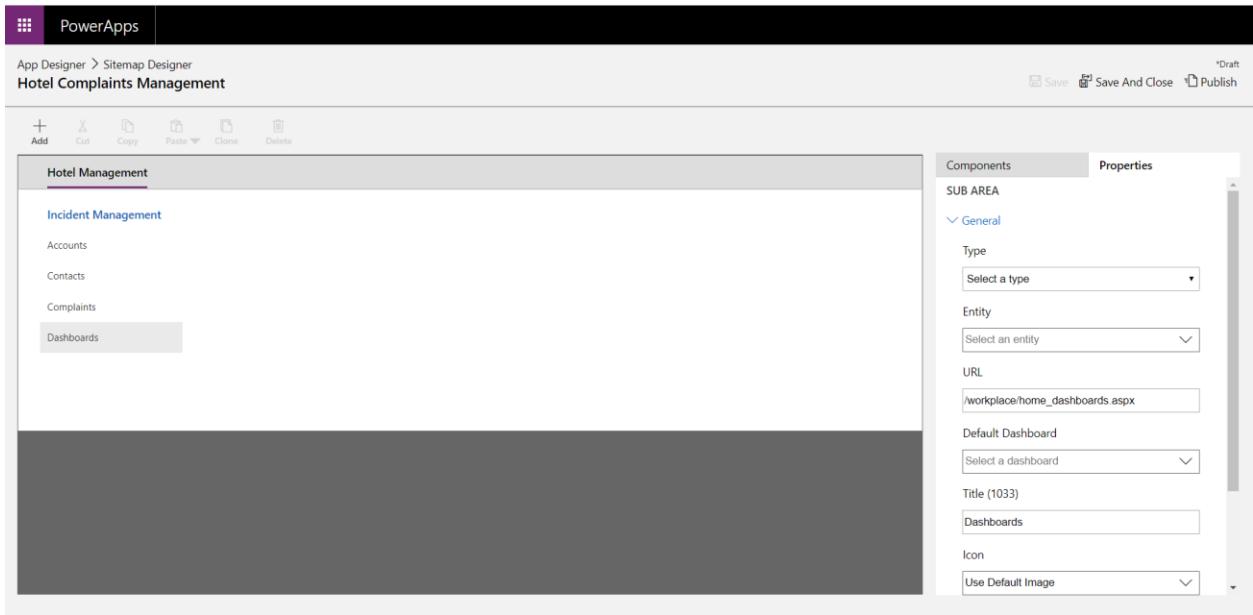
6. You will be navigated to the site map editor. Give your “**Area**” component the name “**Hotel Management**”. Give your “**Group**” the name “**Incident Management**”, then in your “**Sub Area**” select “**Entity**” from the “**Type option**” and select the “**Account**” entity.



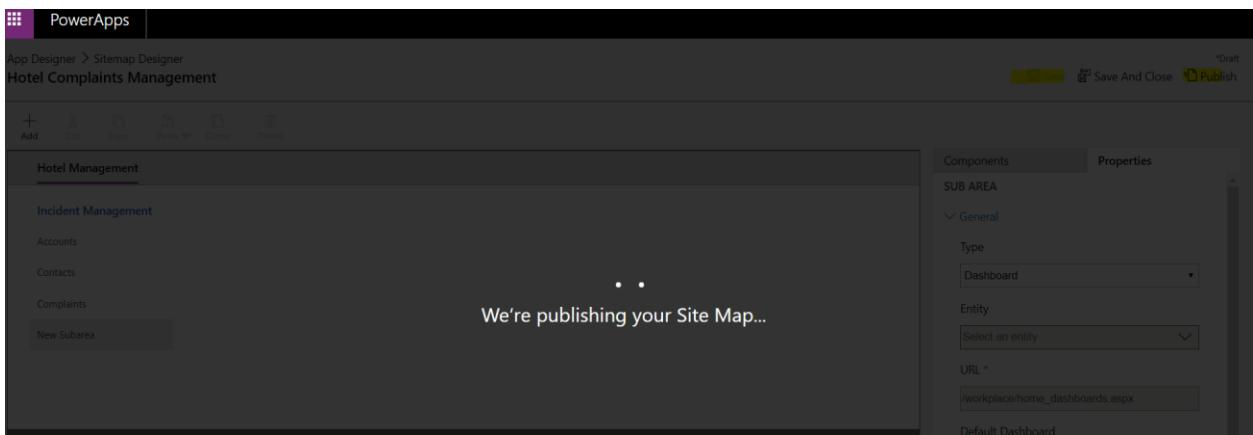
7. To add another “**Sub Area**” drag the sub area component into the sitemap.



8. Then select the “**Contact**” entity from “**Entity**” optionset.  
 9. Follow the same process for “**Complaints**”  
 10. Finally drag over one more Sub Area and select “**Dashboards**” from the “**Type**” Optionset. Make sure to set the title of the sub area to “**Dashboards**”.

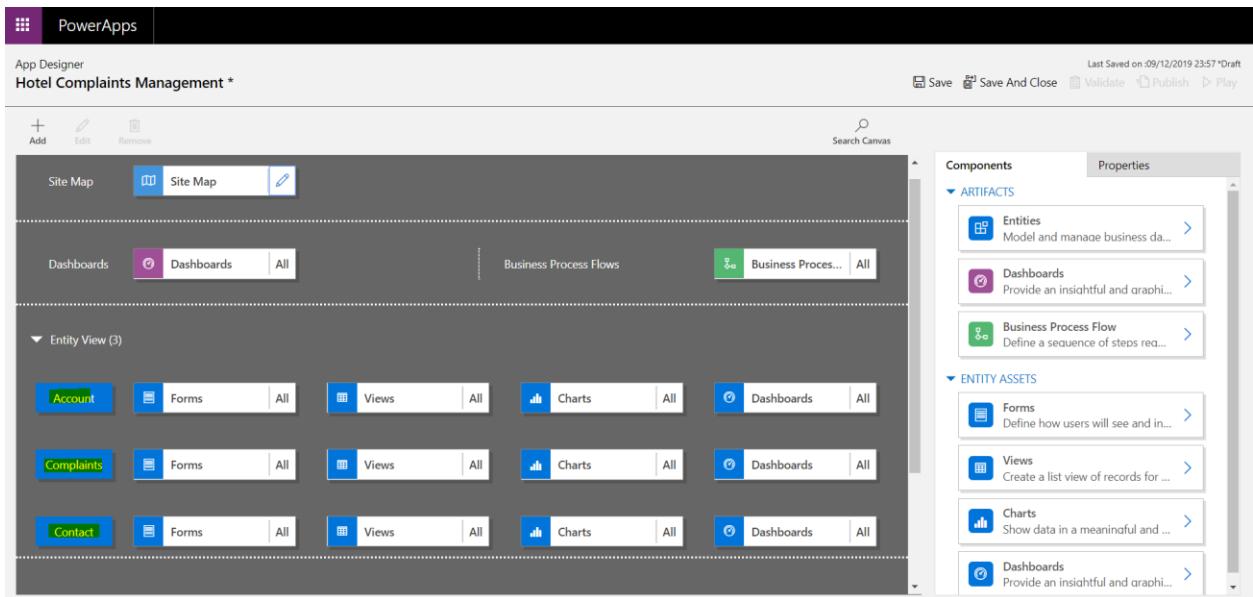


11. From the top right select “Save” and then “Publish”.

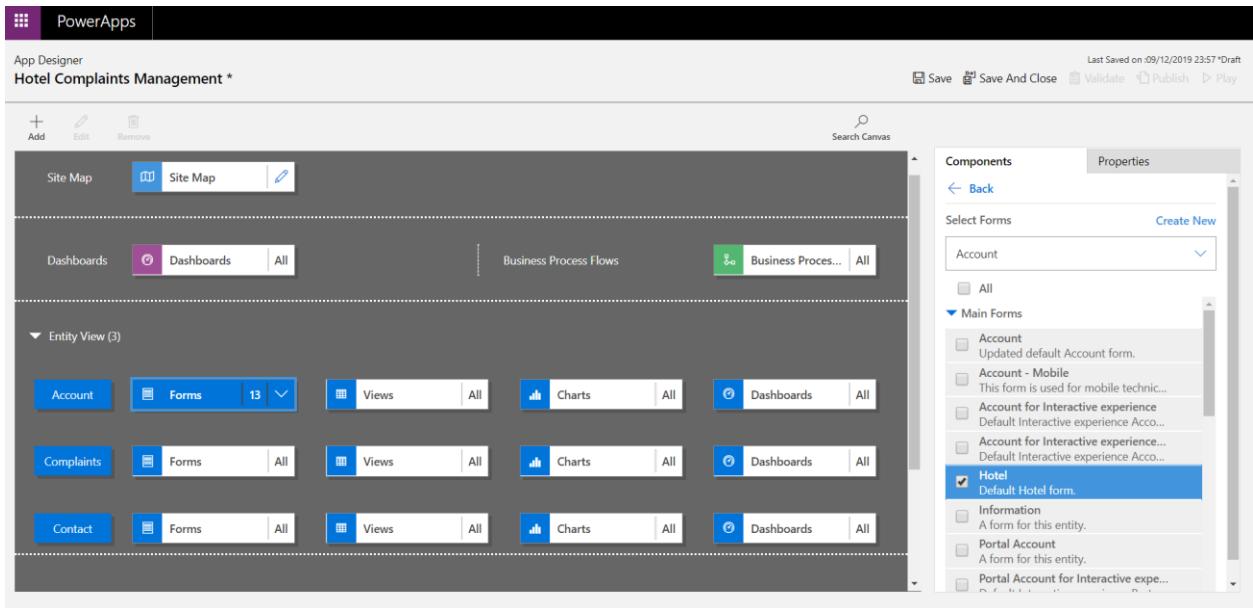


12. Once published select “Save and Close”

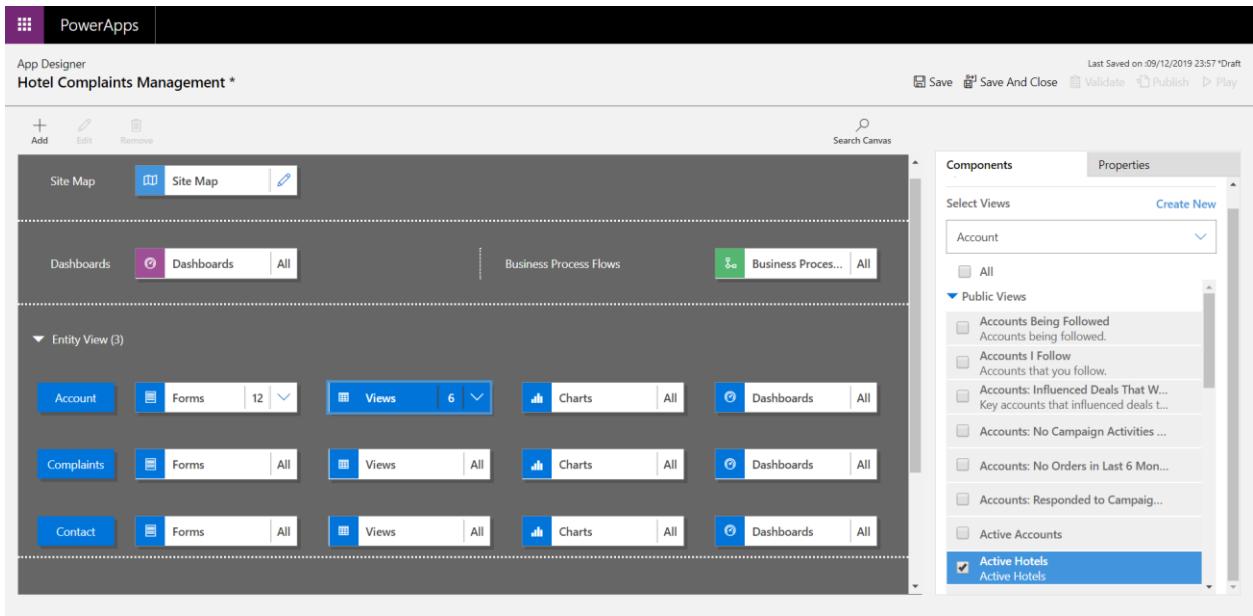
13. You will be navigated back to the main model driven app designer. You will now see that several entities have been added to the list of entities available in this app.



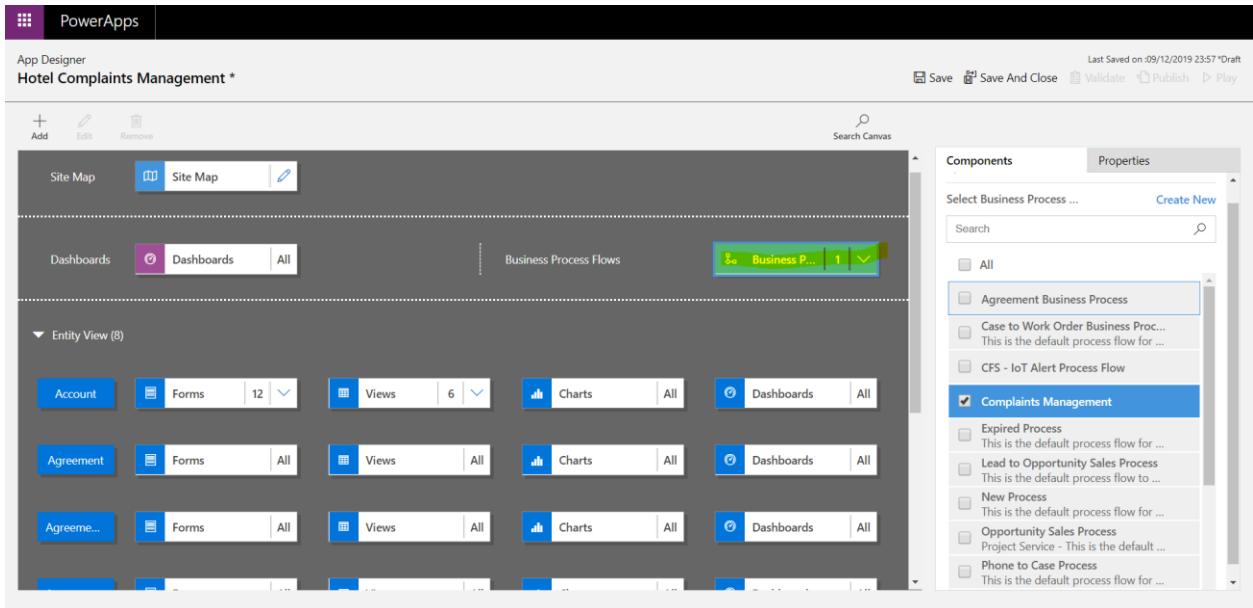
14. On the “Accounts” entity select the “Forms” component and on the right make sure only the “HOTEL” form is selected under the “Main Forms” heading. All other NON MAIN forms **MUST** be selected.



15. Next select the “Views” module and make sure only “Active Hotels” is selected under your “Public Views” section. All other **NON PUBLIC** views **MUST** be selected.



16. Finally select the “**Business Process**” module and ONLY make sure that the “Complaints Management” business process flow is selected. This will add a fourth entity to your list of entities in your app designer.



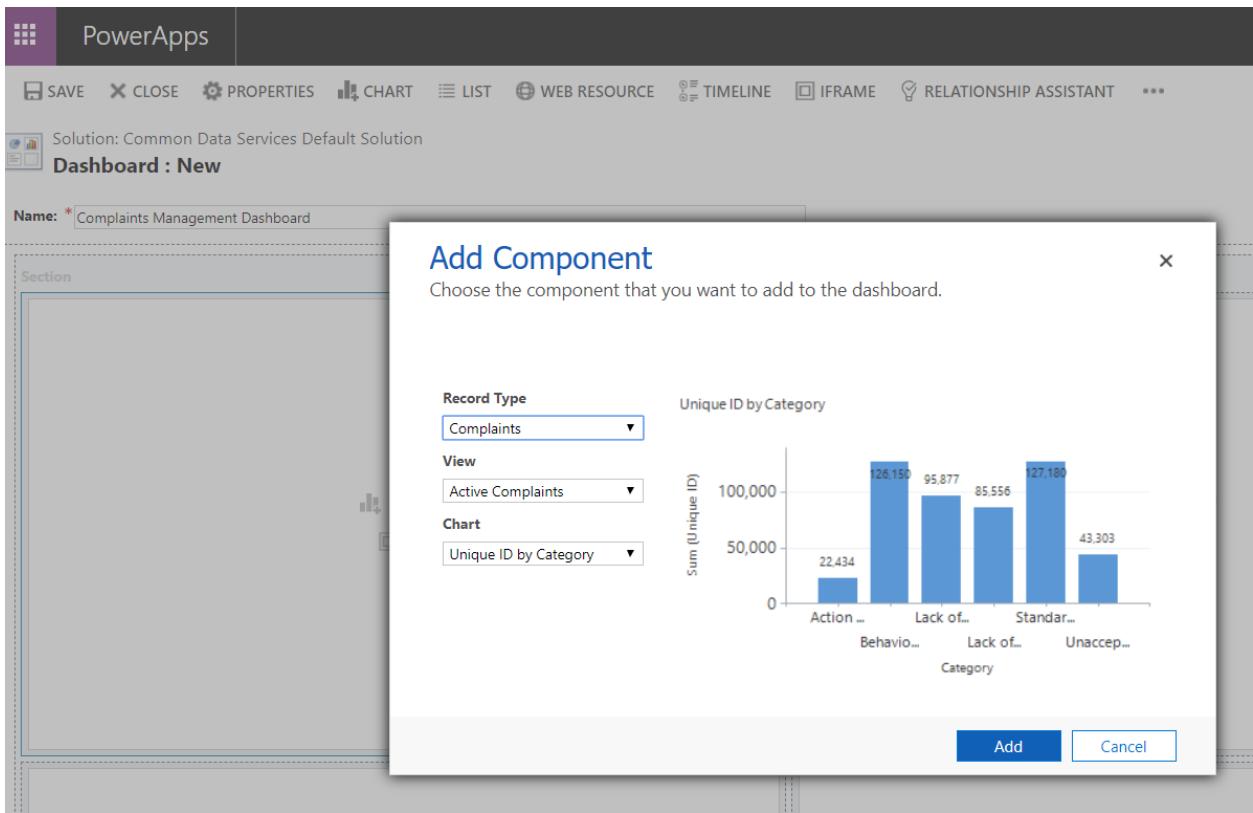
17. Select the “**Dashboards**” module from the App Designer, select “**Create**” and then “**Classic Dashboards**”.

18. This will open the classic dashboard template selector. Select the “**2 Column Regular Dashboard**” and then click “**Create**”.

## Choose Layout

Choose a layout to create a dashboard.

19. Select the Graph Icon from the center of the first tile in the dashboard and make sure you select “**Complaints**” as the entity. Then select “**Active Complaints**” as the view and the first of the 3 graphs you created. Then select “**Add**” to add this to the dashboard.



20. Follow the same process in the second Dashboard tile and this time select the second graph you created.

PowerApps

SAVE CLOSE PROPERTIES UNDO CHART LIST WEB RESOURCE TIMELINE IFRAME ...

Solution: Common Data Services Default Solution

**Dashboard : New**

Name: \* Complaints Management Dashboard

Section

Chart

Unique ID by Category

Sum (Unique ID)

Action of staff Behaviour of staff Location

Add Component

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

Record Type: Complaints

View: Active Complaints

Chart: Unique ID by Stage

Unique ID by Stage

Stage 1 Stage 4 Stage 3 Stage 2

Add Cancel

21. Follow the same process as the previous step in the third tile on the dashboard and this time select the third graph you created.

PowerApps

SAVE CLOSE PROPERTIES UNDO CHART LIST WEB RESOURCE TIMELINE IFRAME ...

Solution: Common Data Services Default Solution

**Dashboard : New**

Name: \* Complaints Management Dashboard

Action of staff Behaviour of staff Location

Add Component

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

Record Type: Complaints

View: Active Complaints

Chart: Unique ID by Date logged

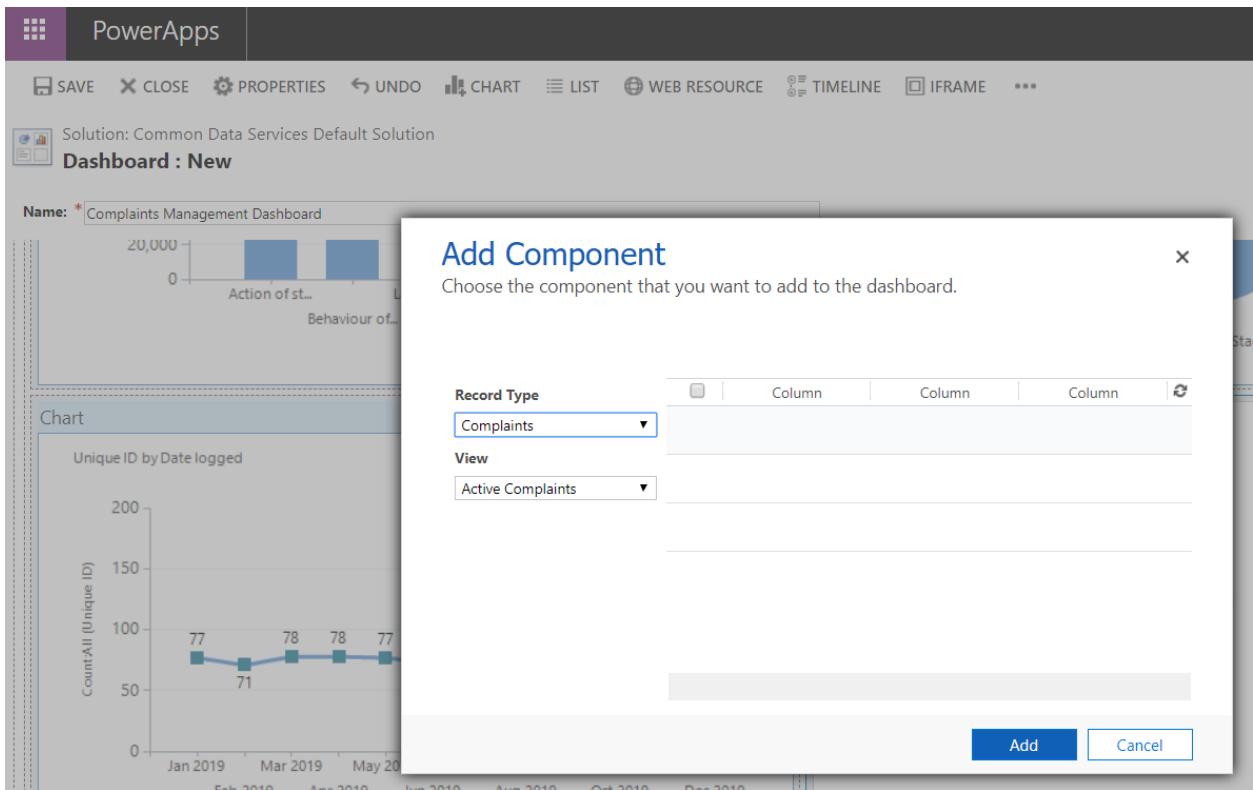
Unique ID by Date logged

CountAll (Unique ID)

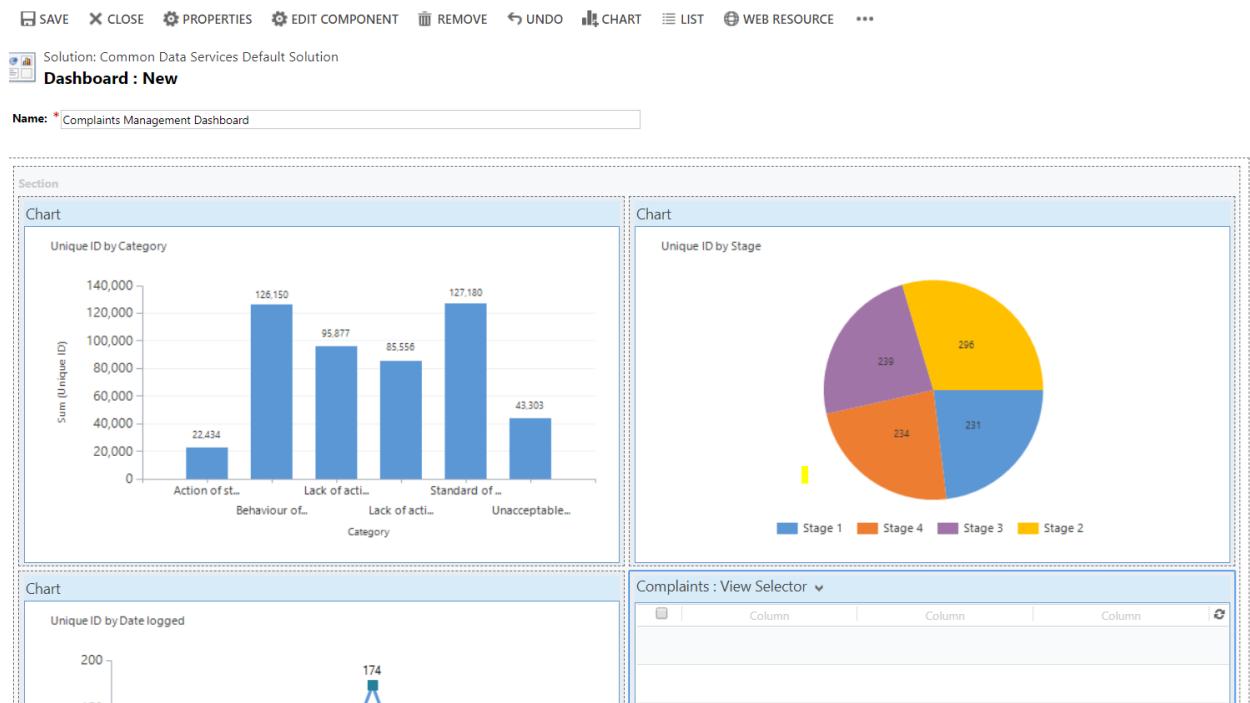
Month (Date logged)

Add Cancel

22. In the fourth step, instead of selecting the graph control in the fourth tile, select the “list” control. This will then only let you select the “Active Complaints” view.



23. Give your Dashboard the name “**Complaints Management Dashboard**” and then “**save**” and “**finally**” close the designer.



24. Make sure that the “Complaints Management Dashboard” is the only one selected in the list.

**PowerApps**

App Designer  
Hotel Complaints Management

Last Saved on: 10/12/2019 00:28 \*Draft

Save Save And Close Validate Publish Play

Site Map Site Map

Dashboards **1** **1**

Business Process Flows Business P... **1** **1**

Entity View (10)

Account Forms 12 Views 6 Charts All Dashboards All

Agreement Forms All Views All Charts All Dashboards All

Agree... Forms All Views All Charts All Dashboards All

**Components**

Select Dashboards Create New

Search

All

Complaints Management Dashboard

Connected Field Service Dashboard

Customer Service Manager Dash... Shows the day-to-day work related ...

Customer Service Operations Dash... Shows the key performance indicat...

Customer Service Performance Da... Shows the key performance indicat...

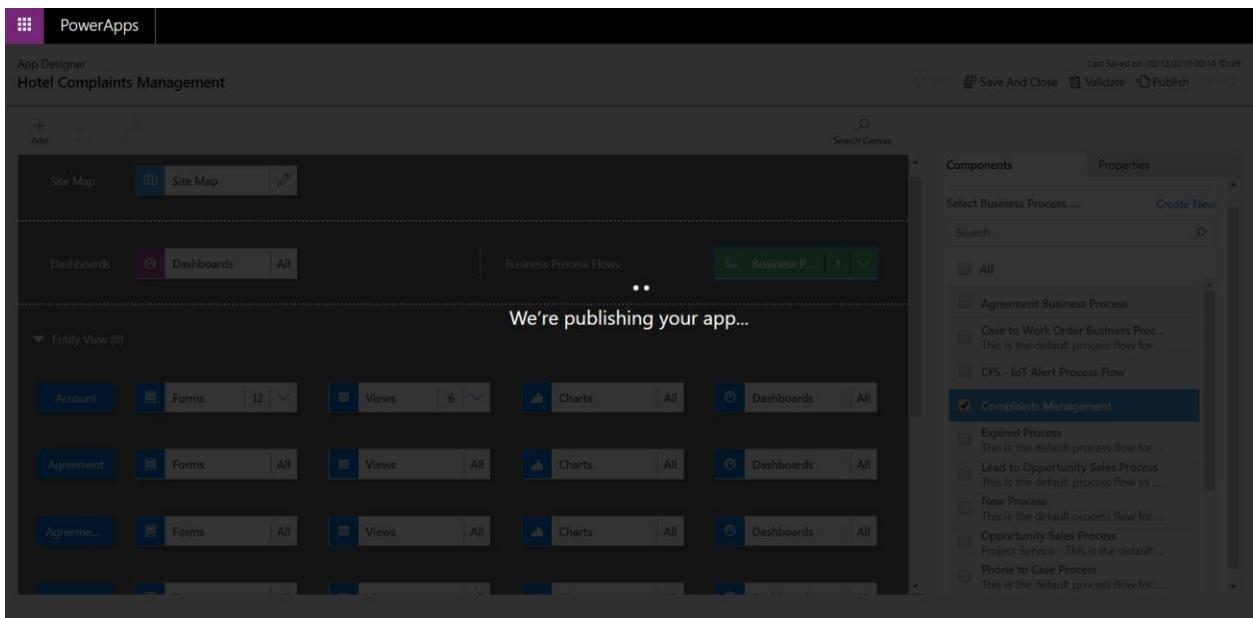
Customer Service Performance Da... Shows the key performance indicat...

Customer Service Representative ... Shows the key performance indicat...

Customer Service Representative S... Shows the key performance indicat...

Customer Service Representative S...

25. On the Top right select “Save” and then “Publish” your new App.



26. Close the App Designer and navigate “[Make.PowerApps.com](#)”, then select “**Solutions**” from the menu. Click “**Publish all Customisations**”.
27. Navigate to “**Apps**” in the Maker experience and you will see the app you created n the list.

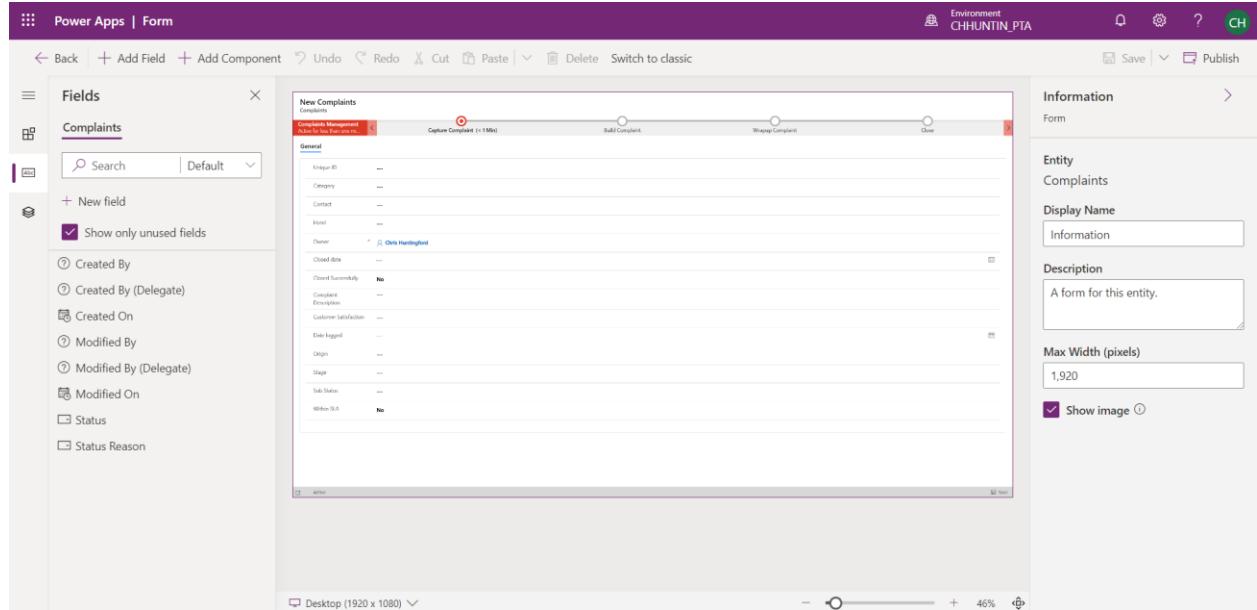
Name	Modified	Owner	Type
Hotel Complaints Management	1 min ago	Chris Huntingford	Model-driven
Demo App	8 h ago	Chris Huntingford	Model-driven
Omnichannel for Customer Service	2 wk ago	Chris Huntingford	Model-driven
BeerBadgers	2 wk ago	Chris Huntingford	Portal
Customer Service Hub	3 wk ago	Chris Huntingford	Model-driven
Sales Hub	3 wk ago	Chris Huntingford	Model-driven
Omnichannel Administration	1 mo ago	Chris Huntingford	Model-driven
Channel Integration Framework	1 mo ago	Chris Huntingford	Model-driven

28. Open your App and test out your functionality.

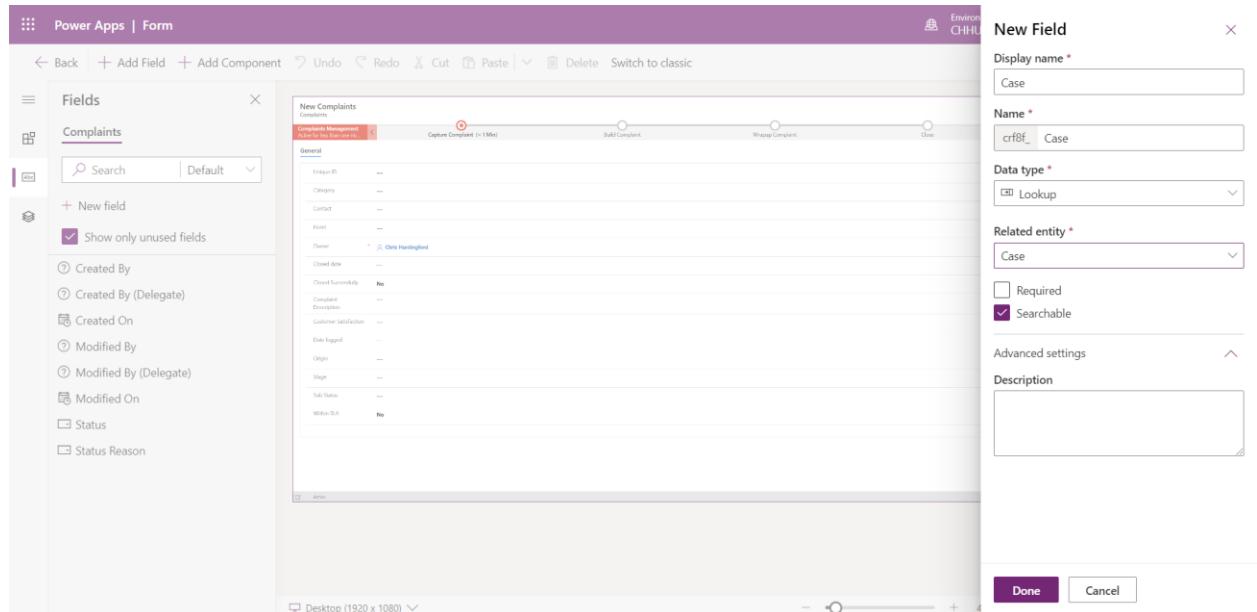
# Step-by-Step 7: Associating Complaints to cases.

Below are step by step instructions that will guide you through the solution. Here you will leverage Dynamics 365 case management to link to the case entity. As well as the entity mapping functionality.

1. Navigate to the Maker experience “[Make.PowerApps.com](#)” and then select the “Complaints” entity. Navigate to the Forms Tab and open the Main “Information” form.



2. Select “New Field” in the field explorer and create a Lookup field to the “Case” entity.



3. Drag and drop the case field onto the form.

The screenshot shows the Power Apps | Form interface. On the left, there's a sidebar titled 'Fields' with a section for 'Complaints'. It includes a search bar, a 'Default' dropdown, a '+ New field' button, and a checked checkbox for 'Show only unused fields'. Below this are several system fields: Created By, Created By (Delegate), Created On, Modified By, Modified By (Delegate), Modified On, and Status. The main area is titled 'New Complaints' under 'Complaints'. It has a 'General' tab selected, showing fields for Unique ID, Category, Case (which is highlighted with a purple border), Contact, Hotel, Owner (with a Chris Huntingford placeholder), and Closed date.

4. Now complaints can be created directly from a case record in Dynamics by leveraging the Business Process flows.
5. Elect “Save” and then “Publish” on the top right of the form.
6. Navigate back to the “complaints” entity in the maker experience.
7. When you select the “Relationships” tab in the complaints entity you will see that the Case relationship has already been created based on the fact that you generated that lookup field. In this scenario this a “Many to One” where many complaints are associated to 1 case.

The screenshot shows the Dynamics 365 maker experience for the 'Complaints' entity. At the top, there are tabs for Fields, Relationships (which is selected), Business rules, Views, Forms, Dashboards, Charts, Keys, and Data. Below this is a toolbar with options like Add relationship, Edit data in Excel, Get data, Export data, Delete entity, Settings, Default, and Search. The main area displays a table of relationships:

Display name ↑	Relationship name ↓	Related... ↓	Relationships... ↓	Type ↓	Custom... ↓
Case	crf8f_crf8f_complaints_crf8f_Case_inc...	Case	Many-to-one	Custom	✓
Contact	crf8f_crf8f_complaints_crf8f_Contact_...	Contact	Many-to-one	Custom	✓
Created By	lk_crf8f_complaints_createdby	User	Many-to-one	Standard	✓
Created By (Delegate)	lk_crf8f_complaints_createdonbehalf...	User	Many-to-one	Standard	✓
Crf8f_Complaints	bpf_crf8f_complaints_new_complaint...	Complaints...	One-to-many	Custom	✓
Hotel	crf8f_crf8f_complaints_crf8f_Hotel_ac...	Account	Many-to-one	Custom	✓
Modified By	lk_crf8f_complaints_modifiedby	User	Many-to-one	Standard	✓
Modified By (Delegate)	lk_crf8f_complaints_modifiedonbehav...	User	Many-to-one	Standard	✓

8. Navigate to “Settings | Customisation | Customise the System” through the classic solution customisation interface. Navigate to the case entity and then select 1:n Relationships.

The screenshot shows the Microsoft PowerApps Studio interface. The top navigation bar includes 'File', 'Publish All Customizations', and 'Help'. On the left, a sidebar titled 'Solution Default Solution' lists various entities: Business Unit, Campaign, Campaign Activity, Campaign Response, Case (selected), Case Forms, Case Views, Case Charts, Case Fields, Case Keys, 1:N Relationships (selected), N:1 Relationships, N:N Relationships, Messages, Business Rules, Hierarchy Settings, Dashboards, Case Deflection, Case Resolution, Case to Work Order..., Category, CFS - IoT Alert Proc..., and Change password f...'. The main content area is titled '1:N Relationships' and shows a table with the following data:

Type:	All			
Schema Name	Primary Entity	Related Entity	Type of Behavior	Field Name
bpf_incident_msdyn_b...	Case	CFS - IoT Alert Process...	Configurable Cascading	Incident
bpf_incident_msdyn_b...	Case	Case to Work Order B...	Configurable Cascading	Incident
crf8f_crf8f_complaints...	Case	Complaints	Configurable Cascading	Case
incident_actioncard	Case	Action Card	System	Regarding
incident_activity_parties	Case	Activity Party	System	Party
Incident_ActivityPoint...	Case	Activity	System	Regarding
incident_adx_alertsubs...	Case	Alert Subscription	Parental	Regarding

At the bottom of the table, it says '1 - 56 of 56 (0 selected)'.

9. In the list you will see the relationship where the related entity is “Complaint”. Open that relationship.

PowerApps

File Save and Close Show Dependencies Solution Layers Managed Properties Actions Help

Relationship Case to Complaints Working on solution: Default Solution

**Common**

- Information
- Mappings

**General**

**Relationship Definition**

Primary Entity *	Case	Related Entity *	Complaints
Name *	crf8f_crf8f_complaints_crf8f_Case_inciden		
Searchable	Yes		
Hierarchical	No		

**Lookup Field**

Display Name *	Case	Name *	crf8f_case
Field Requirement *	Optional		
Description			

**Navigation Pane Item for Primary Entity**

Display Option *	Use Plural Name	Custom Label *	
Display Area *	Details	Display Order *	10,000

**Relationship Behavior**

Type of Behavior *	Configurable Cascading		
Assign *	Cascade None	Reparent *	Cascade None
Share *	Cascade None	Delete *	Remove Link
Unshare *	Cascade None	Merge *	Cascade All
Rollup View *	Cascade None		

10. Select “Mappings” on the left and you will see 1 mapping for “Case”.

PowerApps

File Save and Close Show Dependencies Solution Layers Managed Properties Actions Help

Relationship Case to Complaints Working on solution: Default Solution

**Common**

- Information
- Mappings

New | X | More Actions

	Source Name ↑	Source Display Name	Target Name	Target Display
	incidentid	Case	crf8f_case	Case

11. Create a new mapping by selecting “New”.

12. Map the “Customer” and “Contact” attributes to one another, and then select “OK”.

## Create Field Mapping From Case to Complaints

Create field mapping.

Source Entity Fields			Target Entity Fields		
Name	Display Name...	Type (Size)	Name	Display Name...	Type (Size)
adx_createdbyusername	Created By U...	Single Line of Text(	crf8f_category	Category	Single Line of Text(
createdon	Created On	Date and Time	crf8f_closeddate	Closed date	Date and Time
transactioncurrencyid	Currency	Lookup	crf8f_closedsuccessfully	Closed Succ...	Two Options
<input checked="" type="checkbox"/> customerid	Customer	Customer	<input checked="" type="checkbox"/> crf8f_contact	Contact	Lookup
customercontacted	Customer Co...	Two Options	crf8f_customersatisfac...	Customer Sat...	Whole Number
int customereffort	Customer Eff...	Option Set			

1 - 101 of 101 (1 selected)      1 - 21 of 21 (1 selected)

Help      OK      Cancel

13. Do the same for the “Description” = “Complaint Description” and then close the entity mapping

functionality. Make sure you “Publish all Customisations”.

File      Publish All Customizations

Complaints  
Fields

Solution Default Solution

- Chat Authentication...
- Chat Queue Statistic
- Chat Transcript
- Chat Transcription

View: All

New | X | Edit | M

14. Close the classic configuration experience and Navigate back to “[Make.PowerApps.Com](#)”. Then

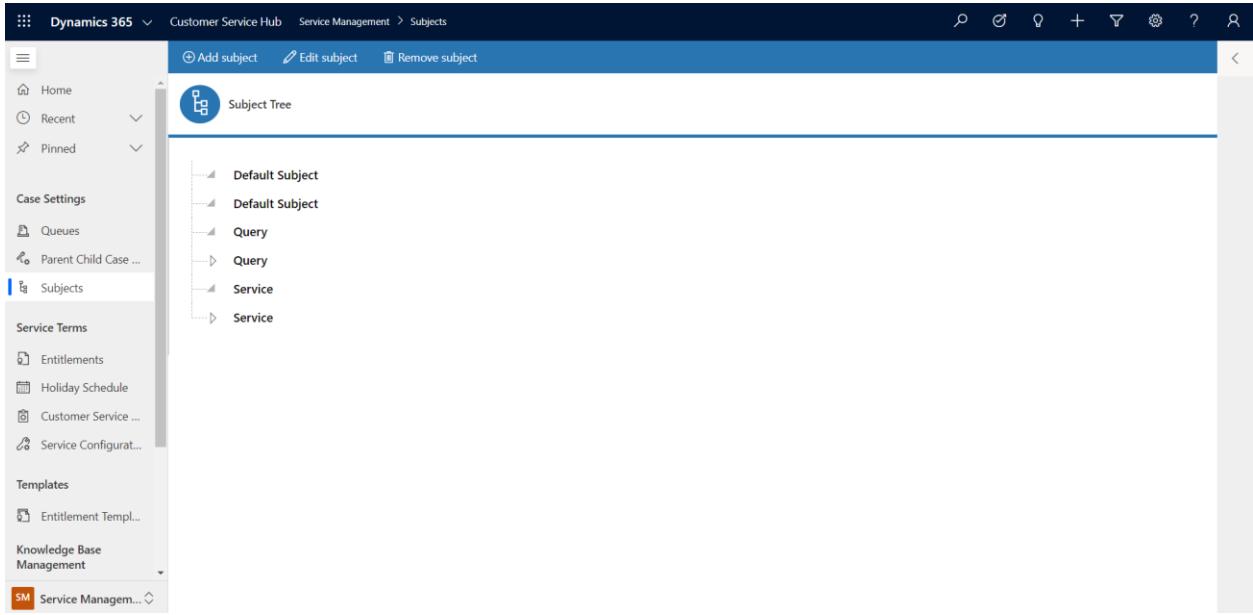
open your “Customer Service Hub” Application.

The screenshot shows the Dynamics 365 Customer Service Hub interface. On the left, there's a navigation bar with 'Dynamics 365' at the top, followed by 'Customer Service Hub', 'Service', and 'Dashboards'. Below this are sections for 'Home', 'Recent', and 'Pinned'. Under 'My Work', there are links for 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Social Profiles', 'Service', 'Cases', 'Queues', and 'Knowledge Articles'. The main area is titled 'Tier 1 Dashboard' and displays four cards: 'Active Cases' (37 items), 'My Resolved Cases' (5 items), 'My Draft Emails' (0 items), and 'My Activities' (57 items). The 'My Activities' card lists various tasks and interactions, such as 'Visitor: Live chat workstre', 'Check Damaged Goods 01', 'Review Documentation 02', and 'Task 04'.

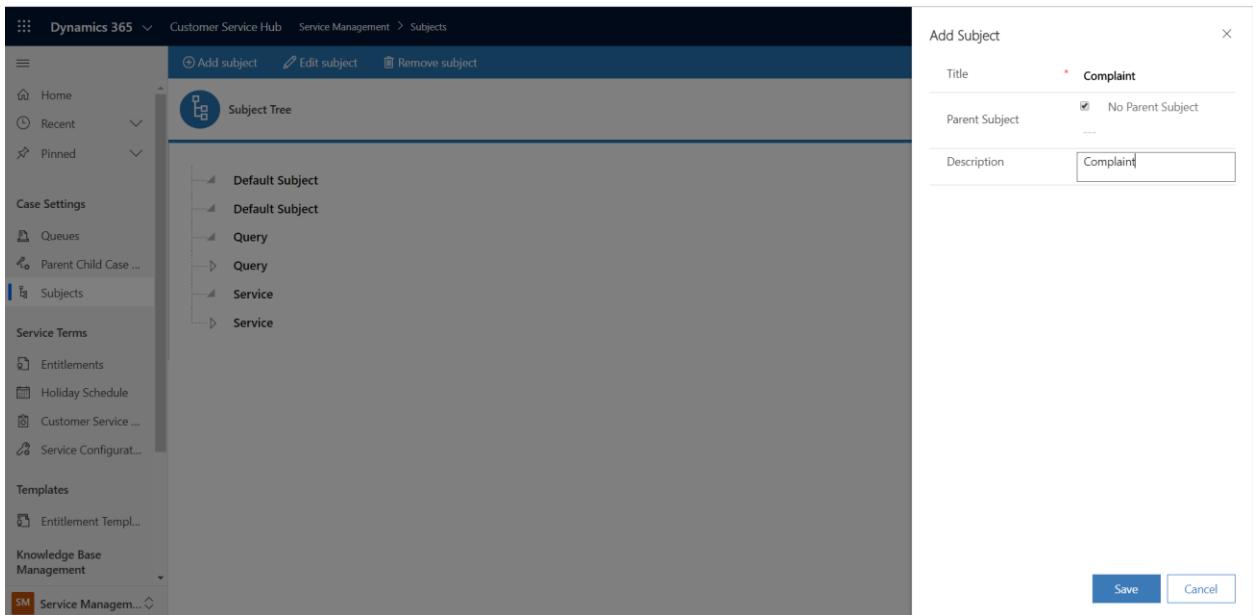
15. Navigate to the very bottom menu and select “Service Management”.

The screenshot shows a 'Change area' menu. On the left, there are several options: 'Service', 'Service Management' (which is checked with a blue checkmark), 'Scheduling', 'Training', and a 'Service Management...' dropdown button. To the right, there are five lines of text labeled with names and their corresponding roles: '**<Dan Jump>**', '**<David So>**', '**<Delegated Admin>**', '**<Demo User>**', and '**<SM>**'. Below these lines is a navigation bar with tabs 'All', '#', 'A', 'B', and 'C'. At the bottom, it says '1 - 42 of 42 (0 selected)'.

16. Navigate to “Subjects” on the left hand menu.



17. Add a new Subject with **NO PARENT** subject and then “**save**”.



18. You will see complaints have now been added to the subject tree.



Home

Recent

Pinned

Case Settings

Queues

Parent Child Case ...

Subjects

Service Terms

Entitlements

+ Add subject

Edit subject

Remove subject



## Subject Tree

Complaint

Default Subject

Default Subject

Query

Query

Service

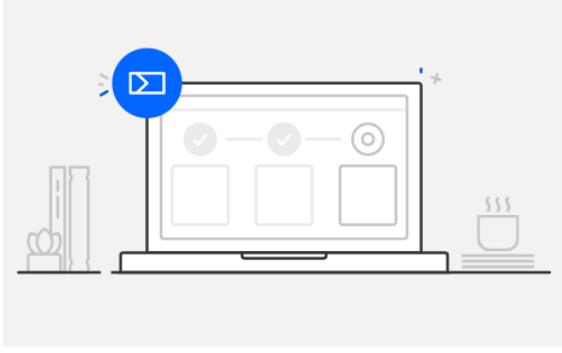
Service

# Step-by-Step 8: Manage your case -> Complaint Management Process

Below are step by step instructions that will guide you through the solution. Here you will leverage the core Dynamics 365 Customer Service functionality as well as Power Automates business Process flows to guide a case to complaint capture process to resolution.

1. Navigate to “**make.PowerApps.Com**” and select “**Flows**” from the menu. Click on the “**Business Process Flows**” tab.
2. Select “**New**” and then crate a new business process flow called “Case to Complaint Management”. Make sure you select the associated entity as “**Case**”.

Build a business process flow X



Guide one or more end-users through a defined process to complete a multistep task.

Examples:

- Onboarding and training new employees
- Nurturing sales leads and closing the loop on opportunities

Flow name \*

Name \*

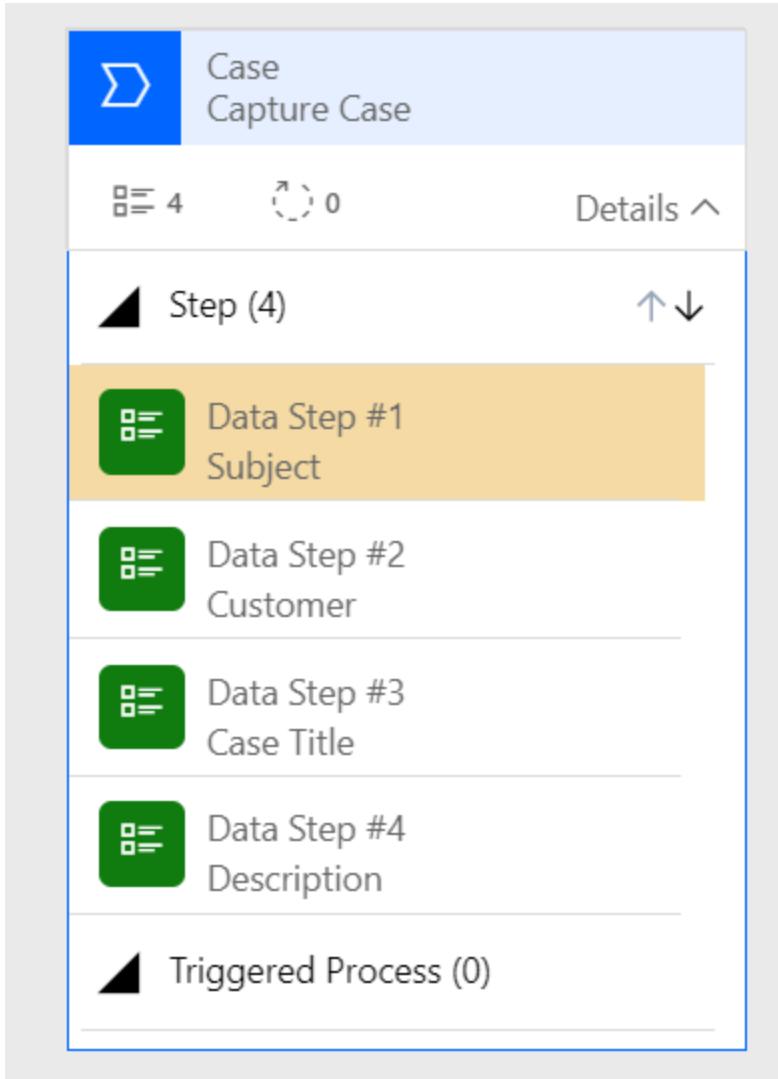
Choose an entity \* (i)

Case

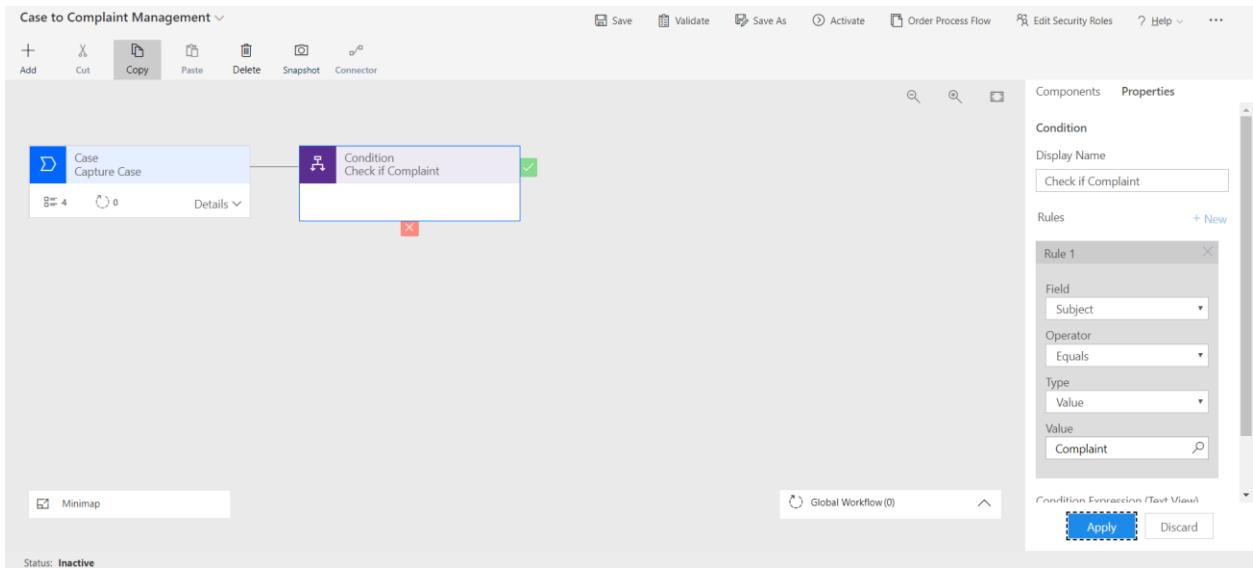
Case Deflection

Create Cancel

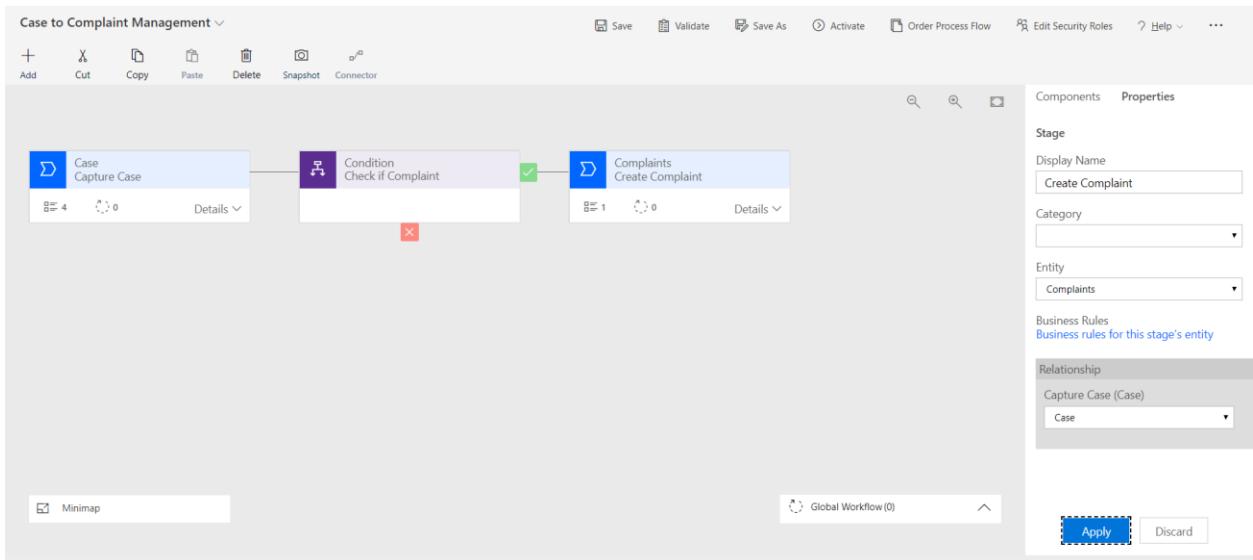
3. In the same manner as you did before, rename the first process component to “Capture Case” and add in data steps for “Subject”, “Customer”, “Title” & “Description”.



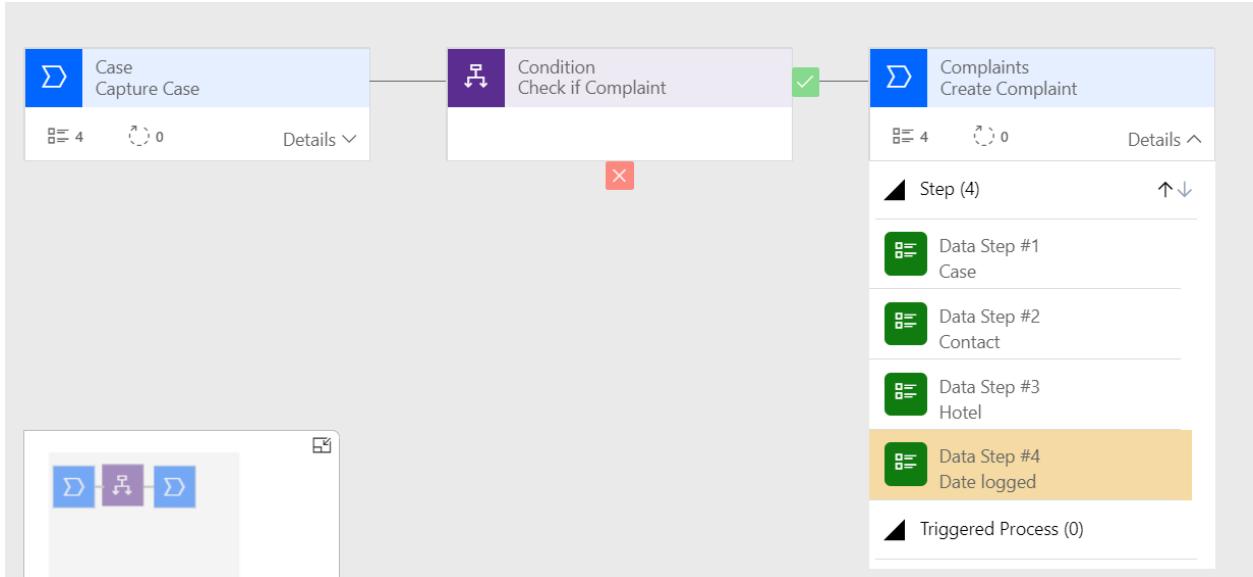
4. Drag a “Condition” component onto the process designer and Make sure “Subject” is selected as the “Field”, the “Operator” is “Equals”, the “Type” is “Value” and then “Complaint” is selected from the subject tree.



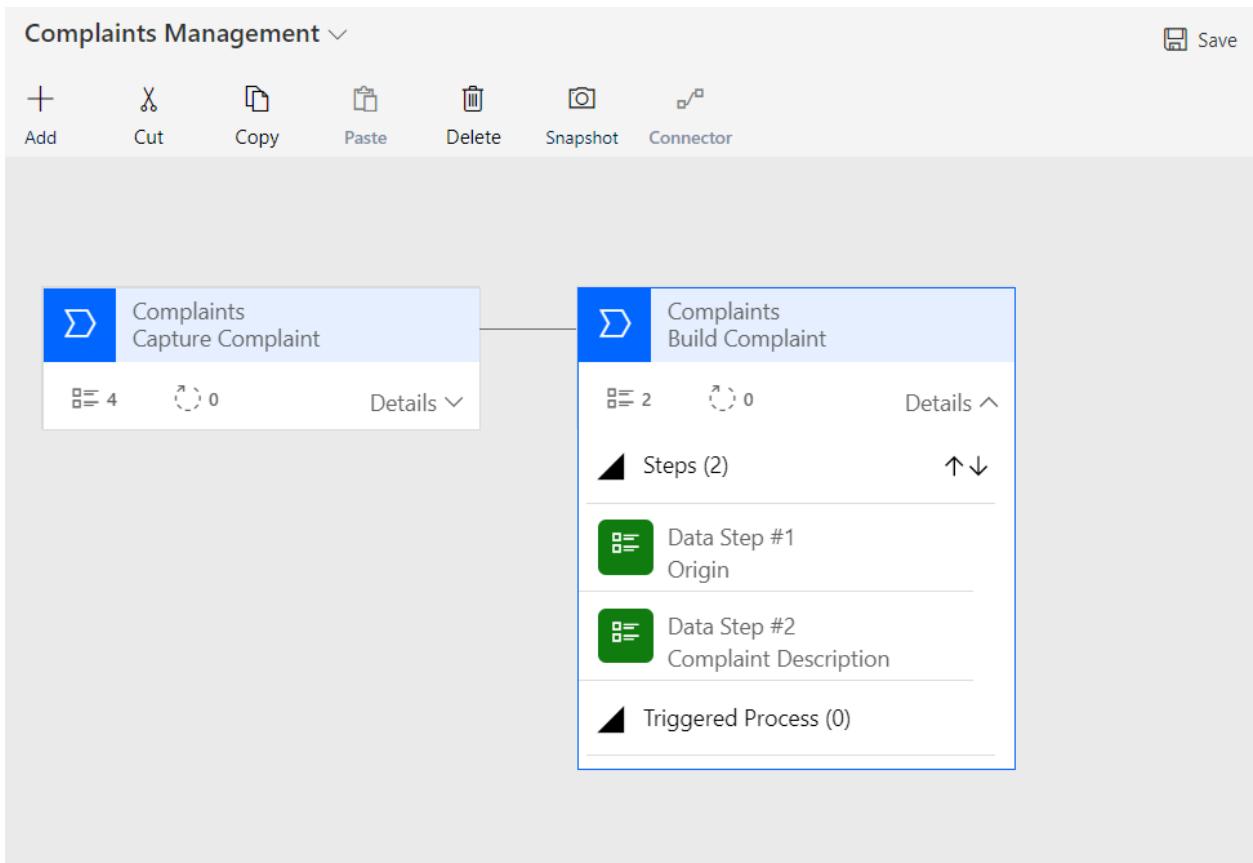
5. Drag a Stage component onto the positive decision node on the condition and make sure that you select the entity as “**Complaints**” and the “**Relationship**” as “**Case**”. Give the stage the name “**Create Complaint**”. This will allow a transition from the case to the new complaint entity through the business process flow.



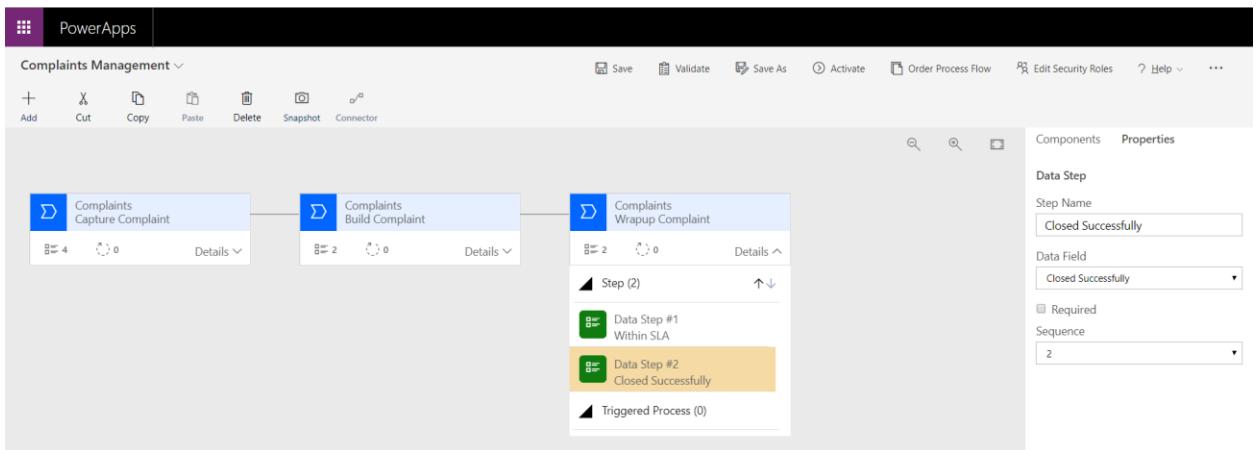
6. Add in the following data steps to the new complaint stage: “**Case**”, “**Contact**”, “**Hotel**”, “**Date logged**”.



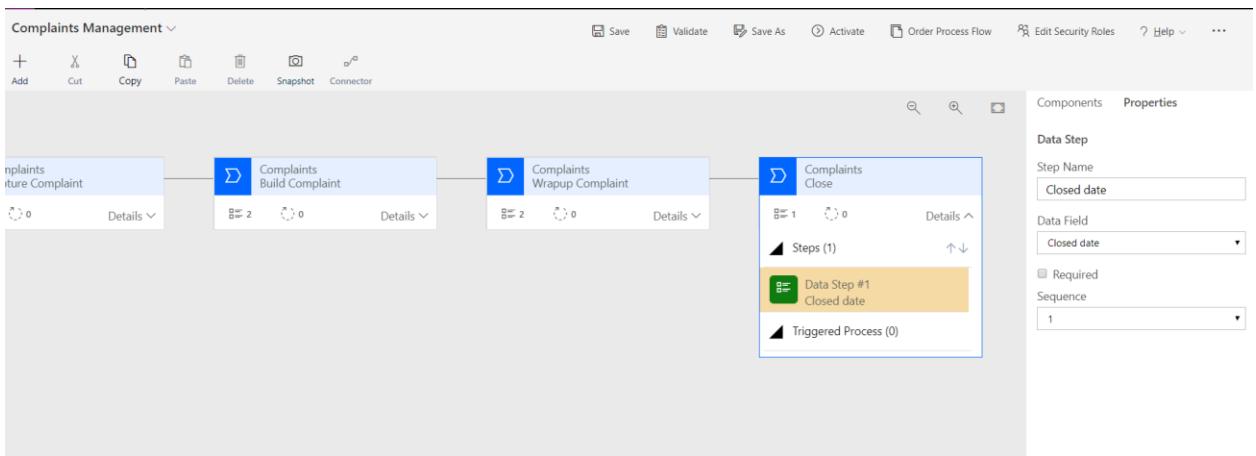
7. Follow the same process as the previous complaint path.
8. In the next step name the stage “**Build Complaint**” and then add data steps for “**Complaint Description**” and “**Origin**”.



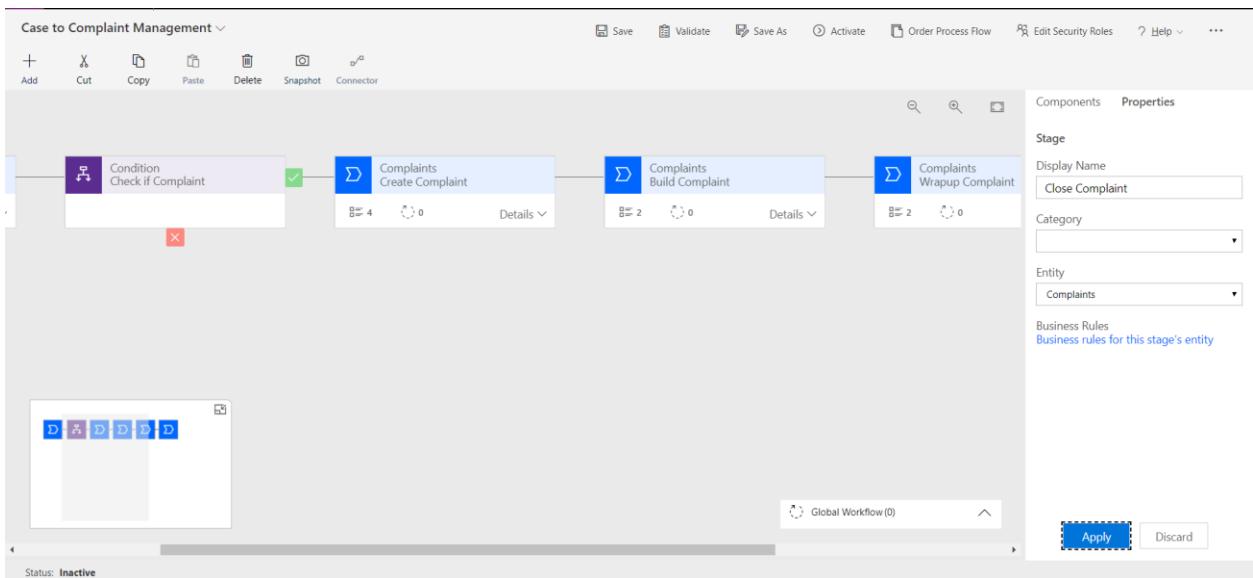
9. Add another stage called “**Wrapup Complaint**” and add data steps for “**Within SLA**” and “**Closed Successfully**”.



10. Add a final step called “**Close**” And add 1 data step for “**Closed Date**”.

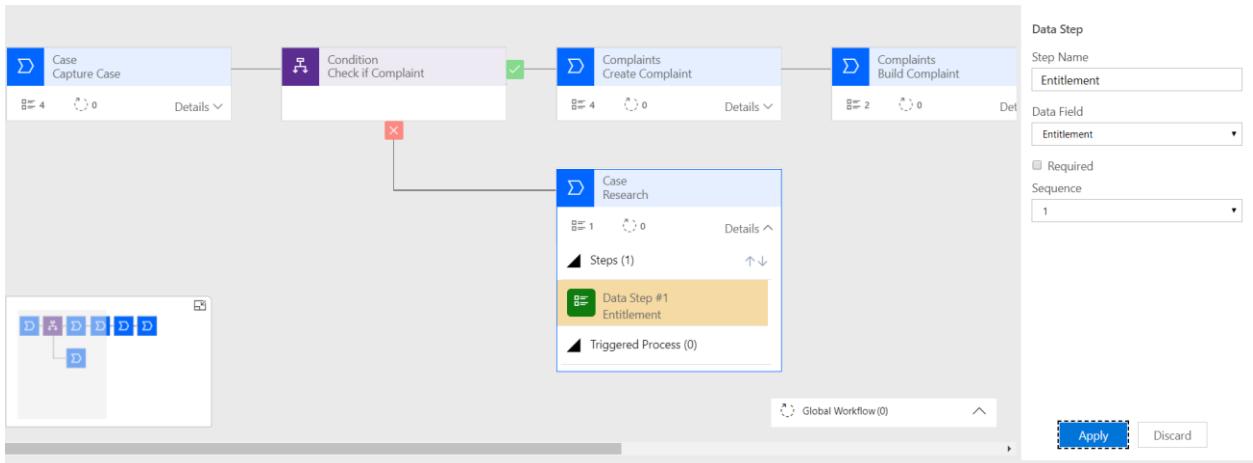


11. After you have added in the rest of the complaint stages the process flow will look like this:

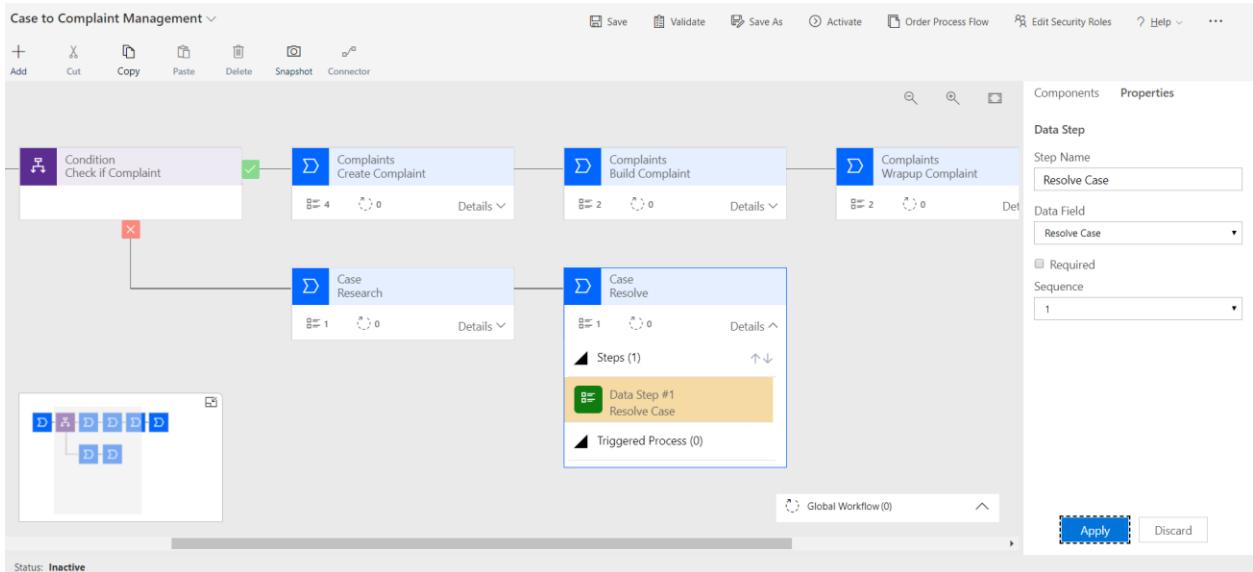


12. You now need to add in the negative path, so that the case can still be progressed if this is not a complaint.

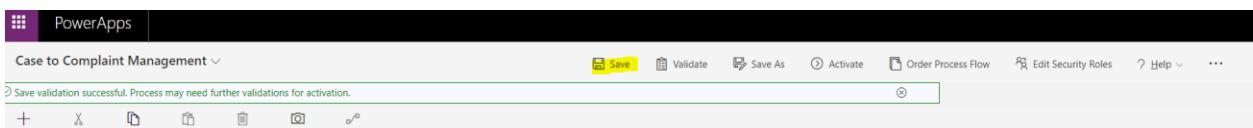
13. Drag a stage component onto the negative path node and call it “Research”. Add in a data step for “Entitlement”.



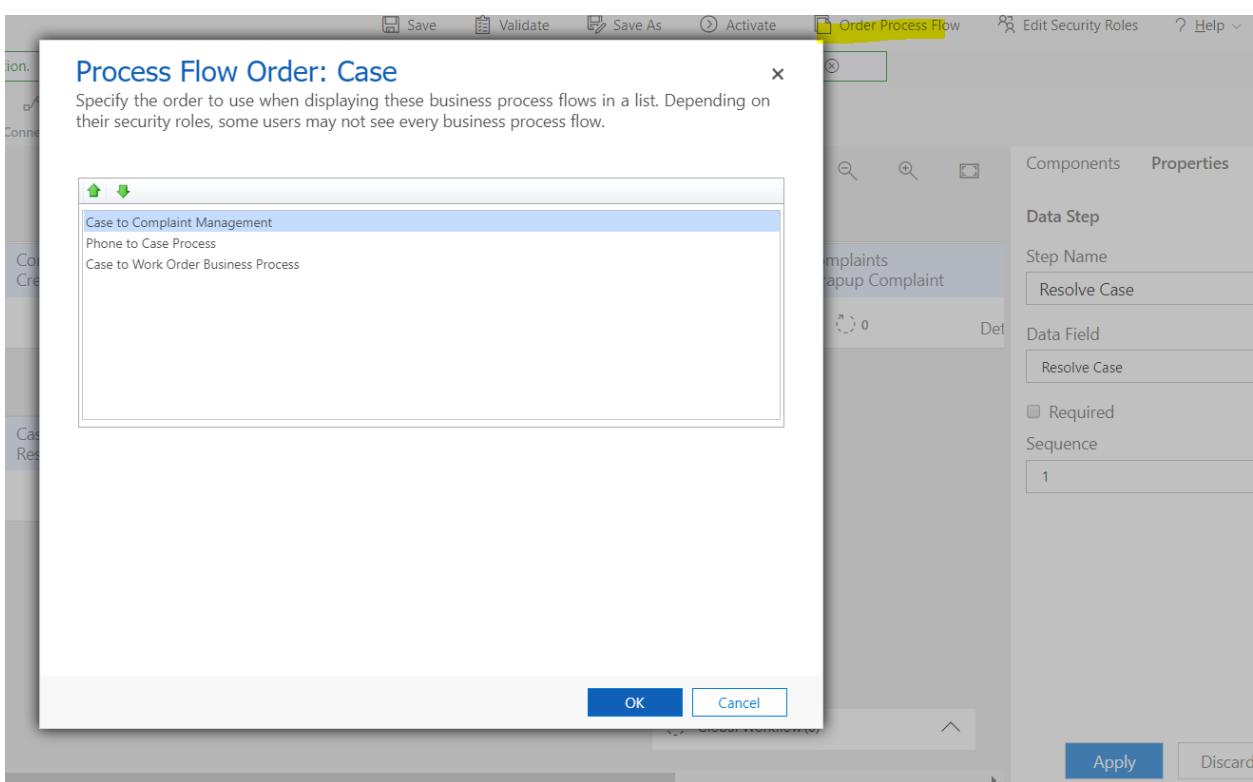
14. Drag in another stage component and call it “Resolve”. Include the data step “Resolve Case”.



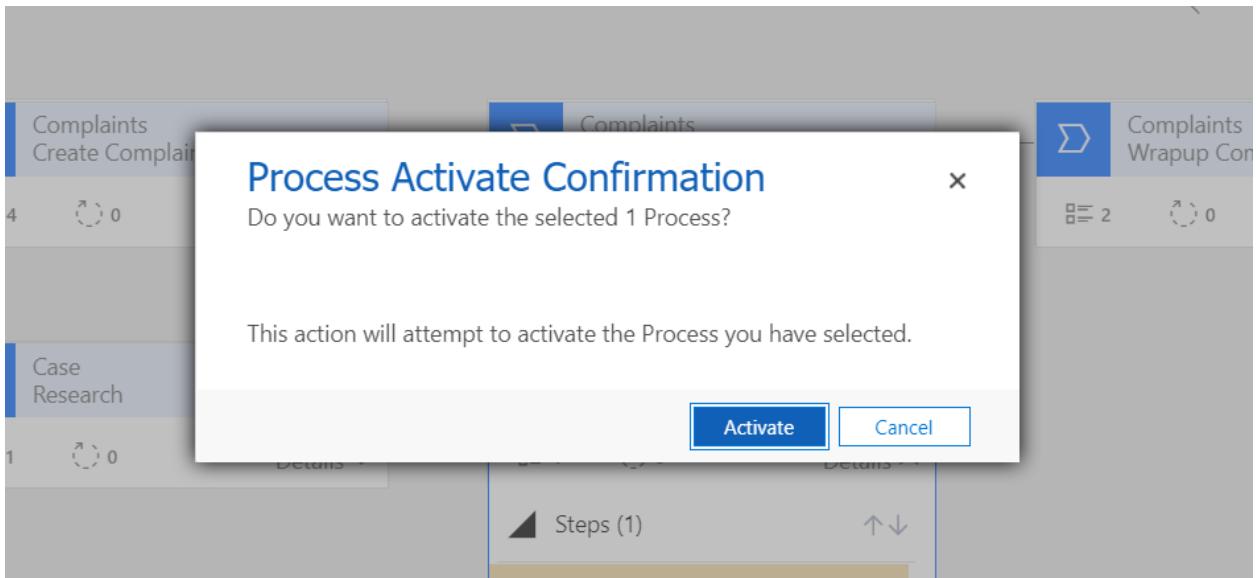
## 15. Save your Process.



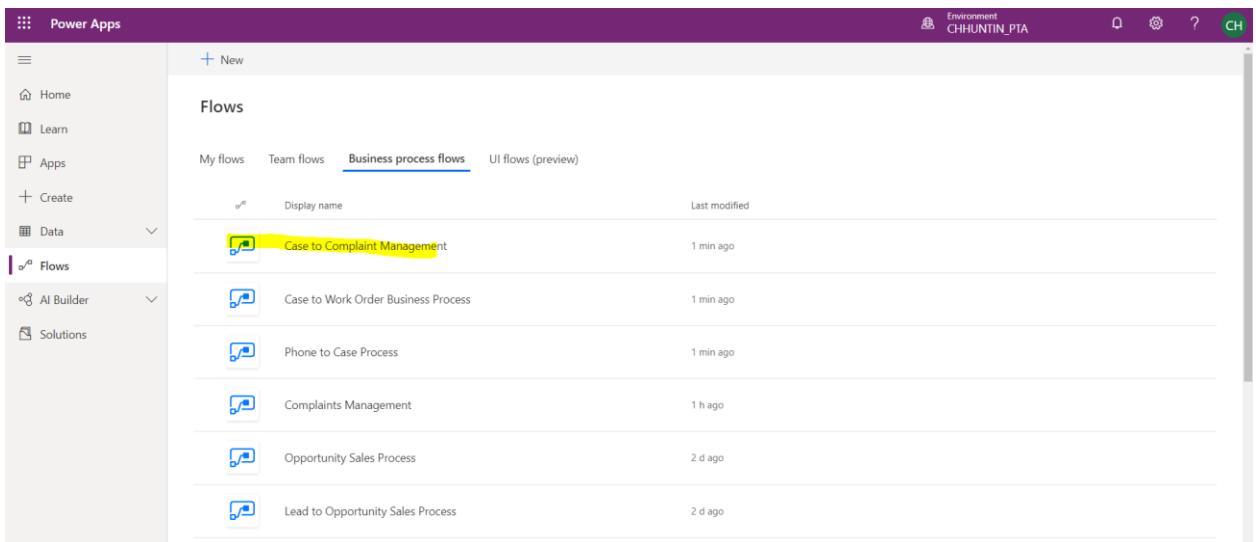
## 16. Select “Order Process Flow” and move the Complaint Management Process to the top of the list. Then select “Ok”.



17. “Activate” the Process Flow.



18. Close the Tab and you will see your new process flow in your list.



19. Navigate to the “Apps” section in “Make.PowerApps.com” and select the “Edit” option in the “Customer Service Hub” App.

Omnichannel for Customer Service ... 2 wk ago Ct

**Customer Service Hub** ... 3 wk ago --

Sales Hub ... Ct

Omnichannel Administration ... Ct

Channel Integration Framework ... Ct

FM Field Service ... Ct

FM Case Management ... 1 mo ago Ct

The screenshot shows a list of business processes in the App Catalog. The 'Customer Service Hub' item has a context menu open, with the 'Edit' option highlighted in yellow.

20. This will open the Model Driven App Designer, select the Processes component and make sure both “Complaint Management” and “Case to Complaint Management” are selected.

Site Map Site Map |

Dashboards Dashboards 9 | Business Process Flows Business P... 6 |

Entity View (27)

Account	Forms 1	Views All	Charts All	Dashboards All
Activity	Forms All	Views All	Charts All	Dashboards All
Appointm...	Forms 1	Views All	Charts All	Dashboards All

Components Properties Back

Select Business Process ... Create New

Search

All

- Agreement Business Process
- Case to Complaint Management
- Case to Work Order Business Proc... This is the default process flow for ...
- CFS - IoT Alert Process Flow
- Complaints Management
- Expired Process This is the default process flow for ...
- Lead to Opportunity Sales Process This is the default process flow to ...
- New Process This is the default process flow for ...
- Opportunity Sales Process

21. “Save” and “Publish” the changes
22. Close the App designer
23. Go to your customer Service hub app and test out your new process flow.

Dynamics 365 Customer Service Hub Service > Cases > Complaint - Terrible service and damaged go...

Save & Route New Create Child Case Resolve Case Cancel Case Add to Queue Queue Item Details Assign Do Not Decrement En... + ? < >

**Complaint - Terrible service and damaged goods**  
Case  
Normal Priority 10/12/2019 01:45 In Progress Status Chris Huntingford Owner

**Case to Complaint Manager** Active for less than one minute

Capture Case (< 1 Min) Create Complaint Build Complaint Wrapup Complaint Close Complaint

**Summary** Details Case Relationships SLA Related

**GENERAL INFORMATION**

Contact Chris Huntingford  
A. Datum Corporation (sample)  
Chris.huntingford83@gmail.com 07761449254

Case Title \* Complaint - Terrible servi...

**TIMELINE**

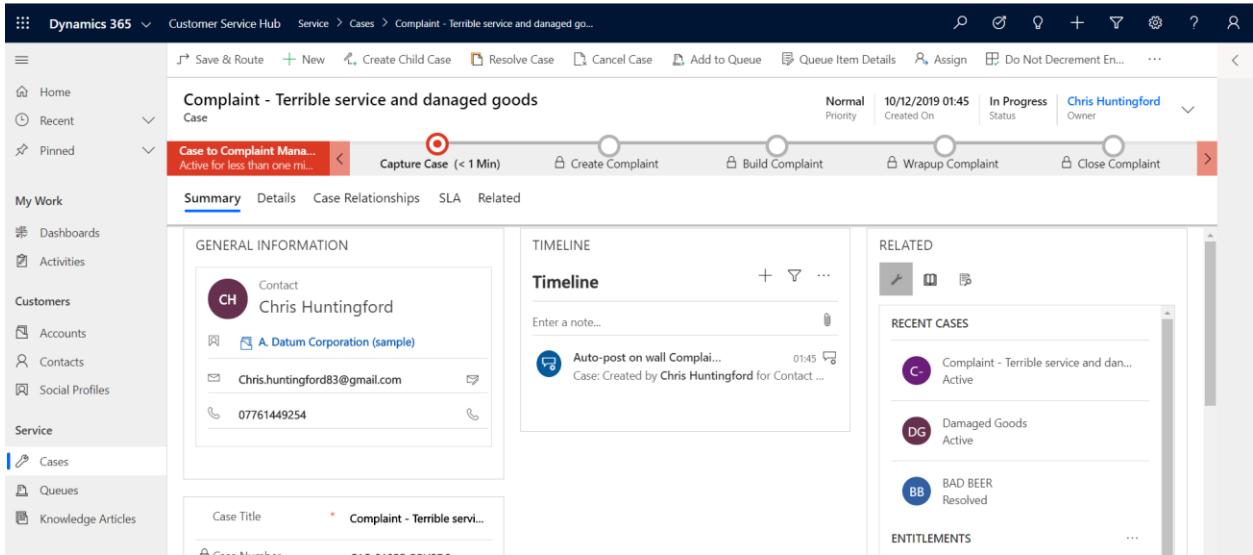
Timeline Enter a note... Auto-post on wall Complai... Case: Created by Chris Huntingford for Contact ...

**RELATED**

**RECENT CASES**

- Complaint - Terrible service and dan... Active
- Damaged Goods Active
- BAD BEER Resolved

**ENTITLEMENTS**



Dynamics 365 Customer Service Hub Service > Cases > Complaint - terrible service and damaged go... > Complaint - Terrible Service and damaged goo...

+ New Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates Run Report < >

**Complaint - Terrible Service and damaged goods**  
Complaints

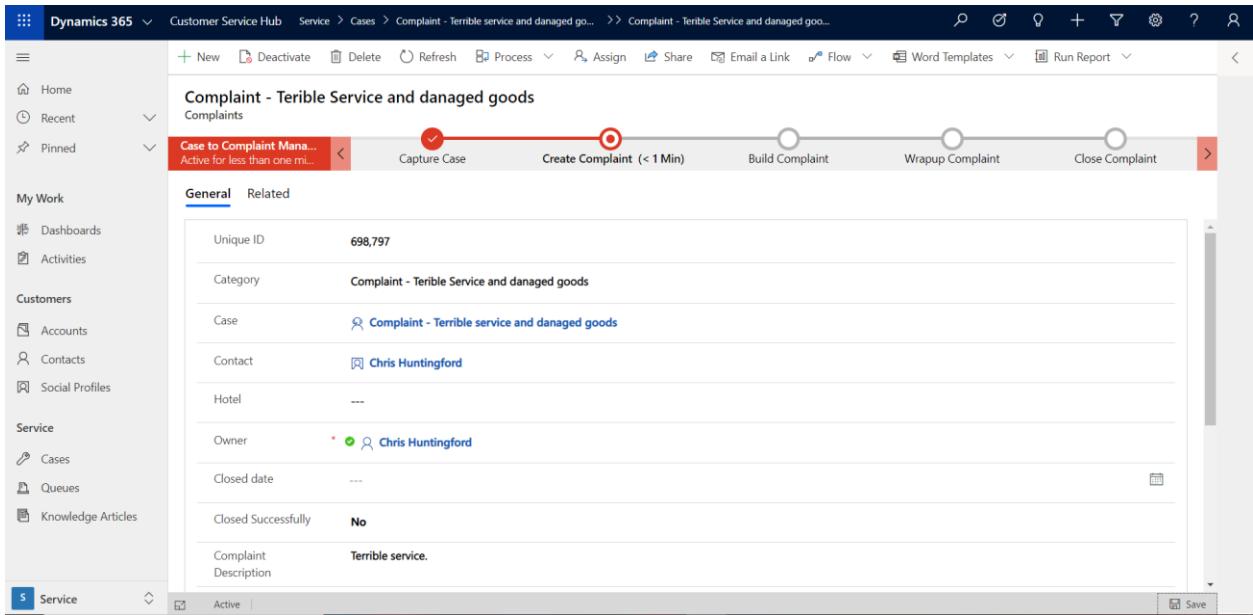
**Case to Complaint Manager** Active for less than one minute

Capture Case Create Complaint (< 1 Min) Build Complaint Wrapup Complaint Close Complaint

**General** Related

Unique ID	698,797
Category	Complaint - Terrible Service and damaged goods
Case	Complaint - Terrible service and damaged goods
Contact	Chris Huntingford
Hotel	---
Owner	* Chris Huntingford
Closed date	---
Closed Successfully	No
Complaint Description	Terrible service.

Active | Save

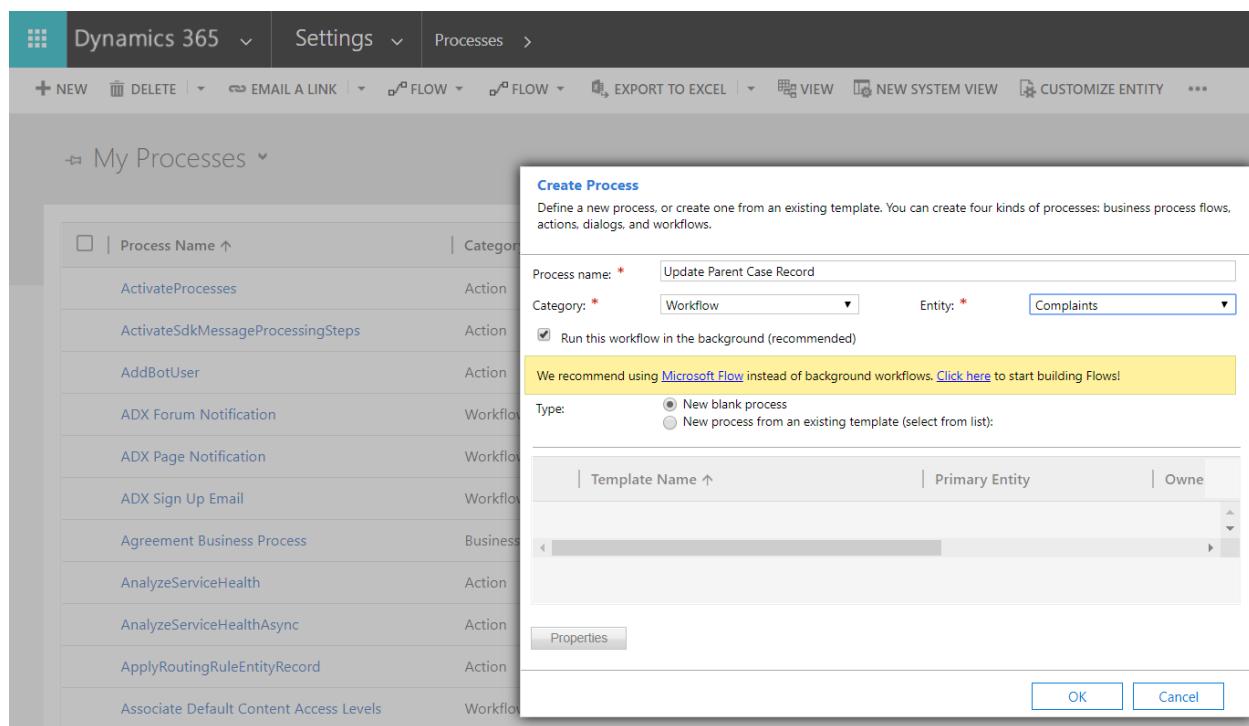


# Step-by-Step 9: Update complaint parent case on resolution

Below are step by step instructions that will guide you through the solution. Here you will leverage the core Dynamics 365 Customer Service functionality as well as Classic Workflow functionality to update the parent case as resolved when the closed date is completed on the child complaint.

1. Open “Customer Service Hub” App and navigate to “Classic Admin UI | Settings ! Processes”.

Create a new “Workflow” flow. Call it “Update Parent Case Record”, select “Complaint” as the trigger entity. Click “OK” when you are ready to build.



2. Set the “Scope” to “Organisation”, make sure the workflow can be run “On Demand” as well.

Only set the workflow to run when a specific field is updated.

**Hide Process Properties**

Process Name *	Update Parent Case Record	Entity	Complaints
Activate As	Process	Category	Workflow
<b>Available to Run</b>		<b>Options for Automatic Processes</b>	
<input checked="" type="checkbox"/> Run this workflow in the background (recommended) <input checked="" type="checkbox"/> As an on-demand process <input type="checkbox"/> As a child process		Scope	Organization
		Start when:	<input type="checkbox"/> Record is created <input type="checkbox"/> Record status changes <input type="checkbox"/> Record is assigned <input checked="" type="checkbox"/> Record fields change <input type="button" value="Select"/> <input type="checkbox"/> Record is deleted
<b>Workflow Job Retention</b>			
<input checked="" type="checkbox"/> Automatically delete completed workflow jobs (to save disk space)			

Add Step | Insert | Delete this step.  
Select this row and click Add Step.

- In the updated fields list select “Closed Date” and then “OK”.

## Select Fields

X

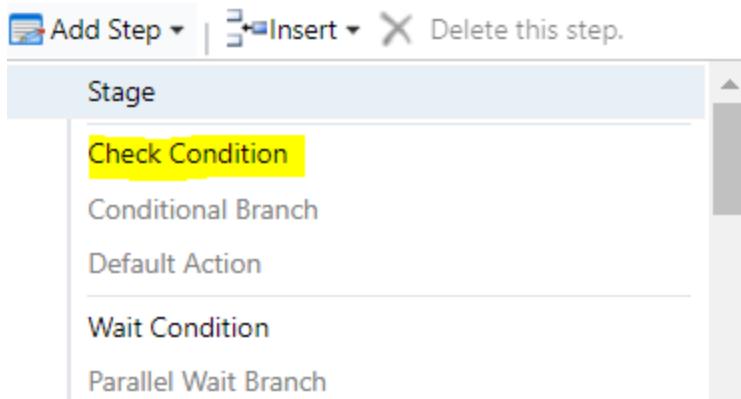
Select the fields that the process will monitor for changes.

Display Name ▲	Name	Type
(Deprecated) Stage Id	stageid	Unique Identifier
(Deprecated) Traversed Path	traversedpath	Single Line of Text
Case	crf8f_case	Lookup
Category	crf8f_category	Single Line of Text
<input checked="" type="checkbox"/> Closed date	crf8f_closeddate	Date and Time
Closed Successfully	crf8f_closedsuccessfully	Two Options
Complaint Description	crf8f_complaintdescription	Multiple Lines of Text
Contact	crf8f_contact	Lookup
Created By	createdby	Lookup
Created By (Delegate)	createdonbehalfby	Lookup
Created On	createdon	Date and Time
Customer Satisfaction	crf8f_customersatisfaction	Whole Number

OK

Cancel

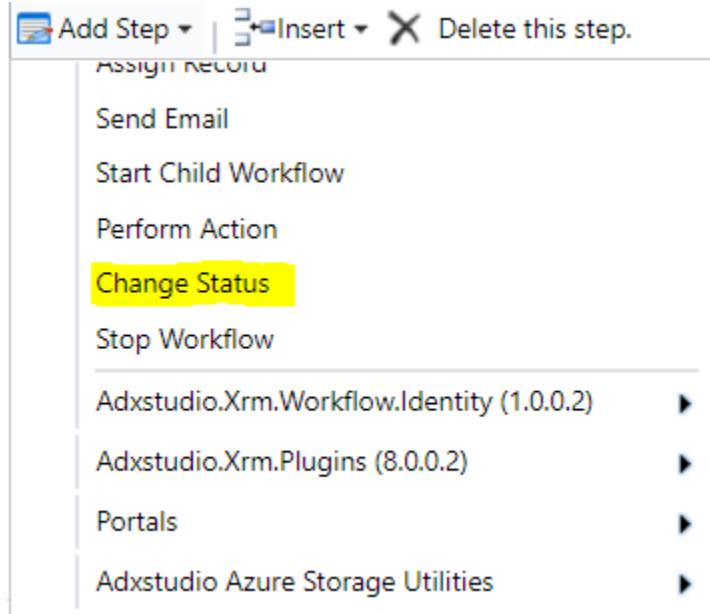
- Add in a new “Check Condition” step.



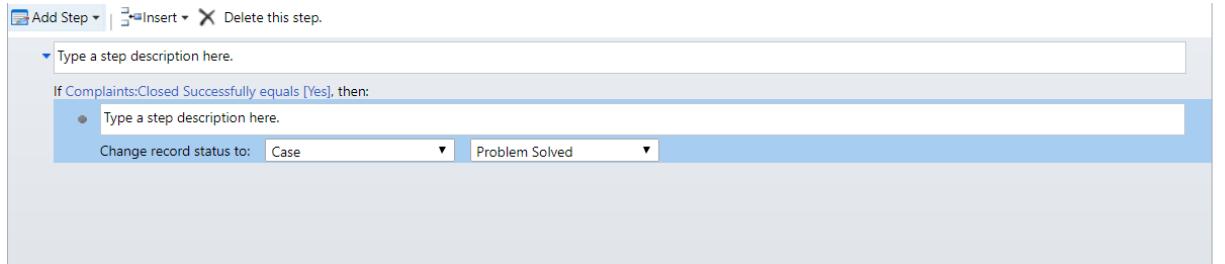
5. Select “**Complaints**” as the core entity, select “**Closed Successfully**” as the primary field, Select “**Equals**” as the operator and select “**Yes**” as the response. Once you have completed this select “**Save and Close**”



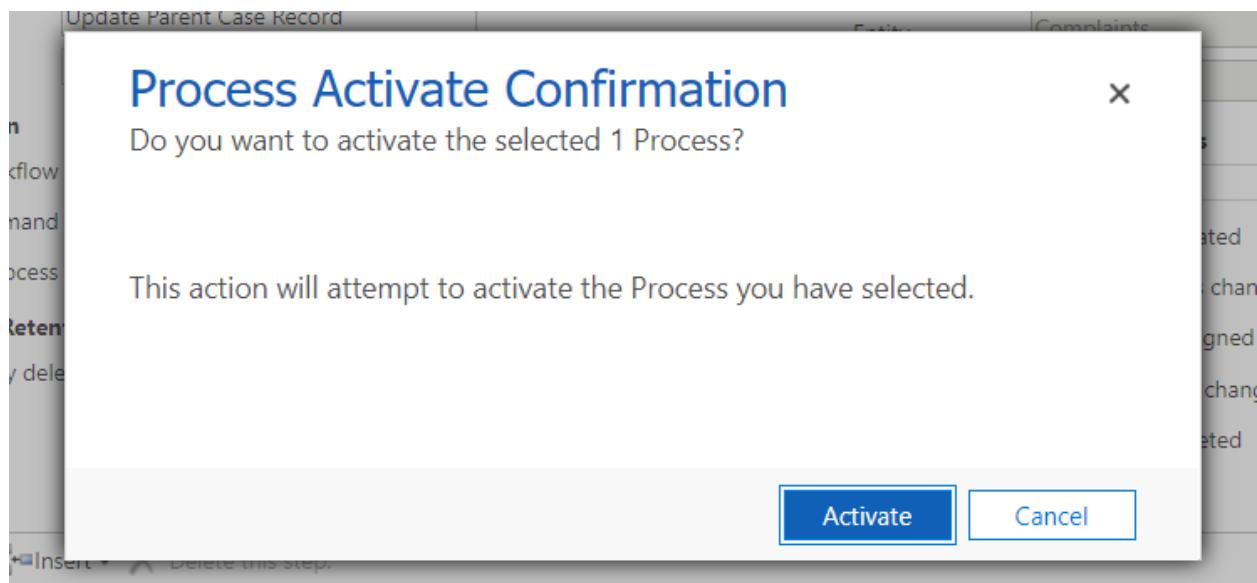
6. Under the Check Condition add in a “Change Status” action.



7. Set the record to “**Case**” and the status to “**Problem Solved**”.



## 8. “Save” and “Activate” your new Workflow.



## 9. Run your case through the complaint process to make sure your workflow works. You should have a resolved case when you update the “Closed Date” on the Complaint.

