Microsoft PowerApps

Visit a business – User Guide apps

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# **Branch Admin App**

The primary function in this App is to maintain the branches, from branch details to generating timeslots per branch. This App has been constructed as a so-called Model-Driven Power App for the purpose of administration supporting data that will be used through the booking process.

## Regional configuration

If you didn’t use the option to upload your regional data as explained in the Solution Deployment document, then you can choose to enter this manually.

Open the Branch admin app and navigate to the Cities for instance via the bar on the left side.

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By clicking on new you can add a new city to your data set, click save to save the record.

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Since the data structure is build with logic, it is advised when adding the data manually, to add the data in the following order:

* Regions
* Provinces
* Cities
* Postal codes

## Add or update branches

If you didn’t use the option to upload your regional data as explained in the Solution Deployment document, then you can choose to enter this manually.

Open the Branch admin app and navigate to the **Branches** via the bar on the left side.

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By clicking on **new** you can add a new branch to your data set, click **save** to save the record.

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Also, you can update an existing branch. From the branch overview, click on a **branch name** and update the details:

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## Generate booking slots

When you are in the Branch details, you can generate timeslots that customers can book by clicking on **Generate Slots**.

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When you entered the details for the timeslots you want to generate, hit **save**. You will see that you get an additional field in your screen:

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Change the **Status Reason** field from new to **Submit** and click **save**. This will trigger a flow in the background to generate the timeslots.

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After this you can close the “generate slots” screen by clicking the **X**.

Once the flow ran, you can see the slots in the branch details, tab Slots as shown below.

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## Review bookings

If you want to see an overview off all the booked timeslots, you can open the Branch admin app and navigate to the **Bookings** via the bar on the left side. This will give you an overview of all the bookings made.

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# **Booking App**

This App has been constructed as a so-called Canvas-Driven Power App for the purpose of the call-centre agents or receptionists to book appointments/timeslots on behalf of their customers.

## Select a branch

There are two mandatory fields, the **Branch**, and the **date** that the customer is requesting.

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As alternative fields the agent can add the customer name, email-address, and phone number.

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After selecting/changing the date, the list of available slots will appear, and if the customer agrees with one of the options available, the agent needs to select the option (will be marked with the Gray background) and click **Book**.

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After clicking Book, the confirmation will appear, and it will contain the booking confirmation code.

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If the customer provided his/her email, then (s)he will receive a confirmation via email.

## Branch Search

If your business has multiple locations and your customer doesn’t know which one is the best option, or want to see the best next option available, a search can be done on the branches by clicking the  button:

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The branch search is possible by using the following methods:

* Branch postal code (exact postal code), which is the postal code added to the Branch in the Branch details
* Region/Province/City associated with the Branch. By selecting Region, then Province, and City, this will allow to reduce the scope of the search, especially when dealing with a lot of data
* Branch name by searching for the exact name in the field, e.g., if the branch is called “Business Alkmaar” only when typing “Business Alkmaar” results in a record. This option will replace any other option

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When searching for branches, to choose the Branch that was found, the agent needs to press the button “Select”. The button “Close” will close the form without confirming the option.

When searching for the Branch and dates available, the results will be filtered by slots available. Slots that were previously fully booked will not appear as a result.

# **Branch App**

The primary function in this App is to view on Branch level who made an appointment on which timeslot. This App has been constructed as a so-called Canvas-Driven Power App and is considering the usage in a context of a Branch employee where (s)he can see the information per branch – date - timeslot.

## Booking overview

In the below example we see that for Business Alkmaar on 28-05-2020 between 14:00 and 14:30 there is one booking made by Monique. Notice also that there are one out of 5 slots booked (1/5).

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## Timeslot adjustment

Also, from this app a Branch can update and maintain the capacity (timeslots) available by clicking on the setting wheel A picture containing drawing

Description automatically generated. By selecting a timeslot, the capacity for that timeslot can be adjusted. By clicking confirm the changes will be saved.

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# **Power Portal**

The primary function in this App/Portal is to Provide customers to book an appointment/timeslot online. This App/Portal has been constructed with as basis on a Model-Driven Power App.

## Homepage

The homepage in our example is containing an embedded PowerBI report, which we will try to provide as soon as possible in the solution package, for now you’ll not have it unless you create your own.

The customer can access the homepage online and from here (s)he has two ways to book a slot, either via the link at the end of the text or via the Book a Slot in the right top:

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## Book a slot page

A customer will fill in his/her name and email address, select a branch (s)he wants to visit and select the preferred timeslot. Then filling in the security code and click submit to register the booking.

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After the customer has submitted the booking, (s)he will see a thank you page.

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