



Power Platform

App in a Day

Module 2: Microsoft Dataverse

Hands-on Lab Step-by-Step

August 2022

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Microsoft Dataverse

Lab Prerequisites

This is the second lab in a series covering Power Apps Canvas Apps, Microsoft Dataverse, Power Apps Model-driven Apps, and Power Automate. The assumption is that you have successfully completed the initial part of setting up an environment as described in the overview document – “**00-AppInADay Lab Overview.pdf**”.

If you have not completed building the Power Apps Canvas App in Module 1, you can use the partially completed version of the lab package in the “\Completed\Module1” folder. Follow the instructions in the document “Importing Contoso Coffee” before proceeding with this module.

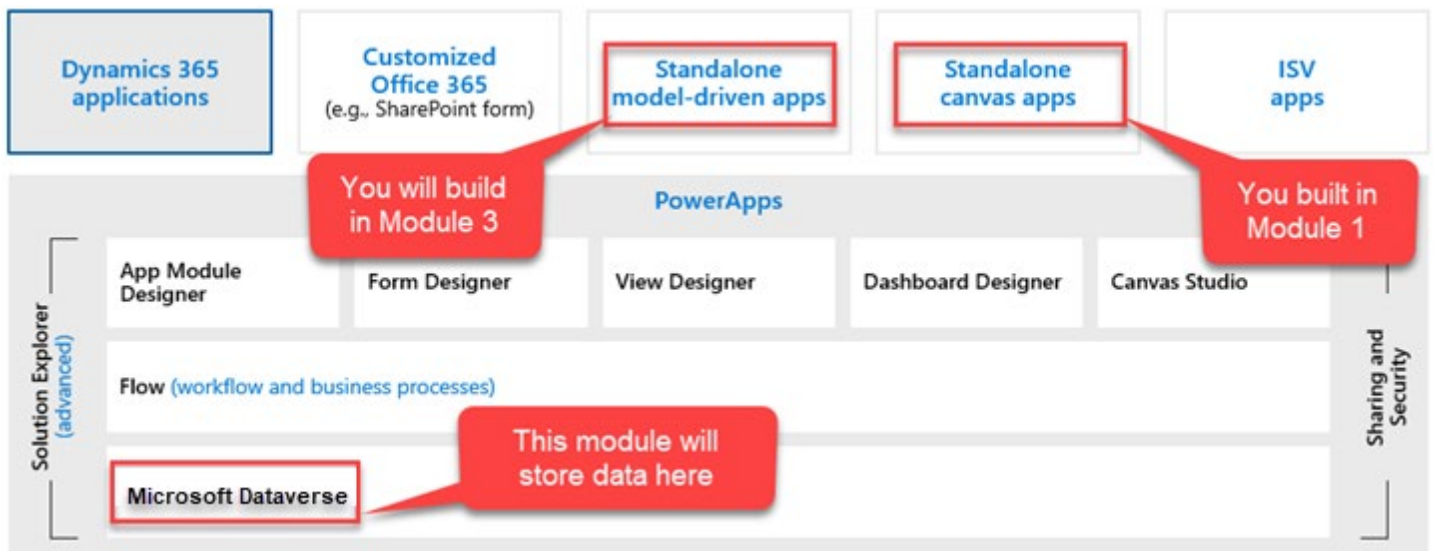
Before you begin

You must be connected to the internet.

1. **Have a Test Environment with permission to create a Microsoft Dataverse database:** You should have gone through the steps to create a new environment using the Admin center. In this lab, you will create a database in this environment, if you haven't already created one.
2. **Sign-in to Power Apps:** Go to [Power Apps](#) and **sign in** with the same account you used to complete the first lab. Make sure you switch to the environment where you created the app.

Overview

[Microsoft Dataverse](#) adds data storage and modeling capabilities to Power Apps that is scalable and easy to provision. In this module, you will be using Microsoft Dataverse to model and store the data from the machine ordering canvas app that you built in module 1. In the next module, you will be building a model-driven application using the same data that will be used by the back-office staff to process the machine orders. These apps that you build on Microsoft Dataverse use the same technology framework (Microsoft Dataverse) that Microsoft Dynamics 365 apps are built-on.



Goals for this lab

After this lesson you will be able to:

- Provision a Microsoft Dataverse database
- Create a custom table and add custom columns to it
- Use the Power Apps Form control to populate the table
- View the table data
- Create a calculated column
- Implement a server-side business rule



The time to complete this lab is [60] minutes.

Exercise 1: Exploring Microsoft Dataverse

In this exercise, you will explore Microsoft Dataverse standard tables. Tables in Microsoft Dataverse are like tables in a database or worksheets in Microsoft Excel. Tables can be connected together with relationships that model real world interactions between the data. Each table contains multiple Rows (Records), each having data columns. For example, a "Project" table may have columns such as Name, Due Date, Status, etc. and it may be related to a "Project Owner" table which might have columns such as Name, Email, etc.

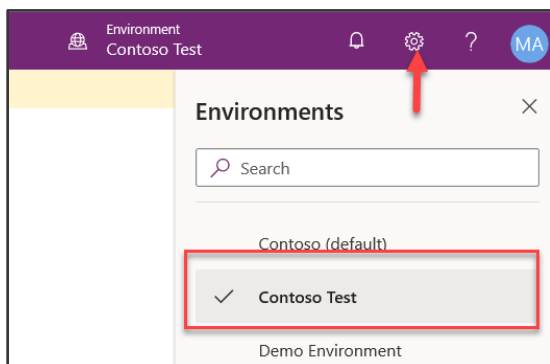
Microsoft Dataverse abstracts a lot of the typical low-level database management work to make it easier for you to configure a custom data model that fits your application.

In addition to allowing for the creation of custom Tables, Microsoft Dataverse contains a Common Data Model (CDM) consisting of hundreds of standard table definitions. You can find the current CDM schema at [Github Microsoft CDM](#) and you can browse the CDM using the CDM Visual Table Navigator located here [Github CDM](#). You can read more about the CDM here [Common Data Model Overview](#).

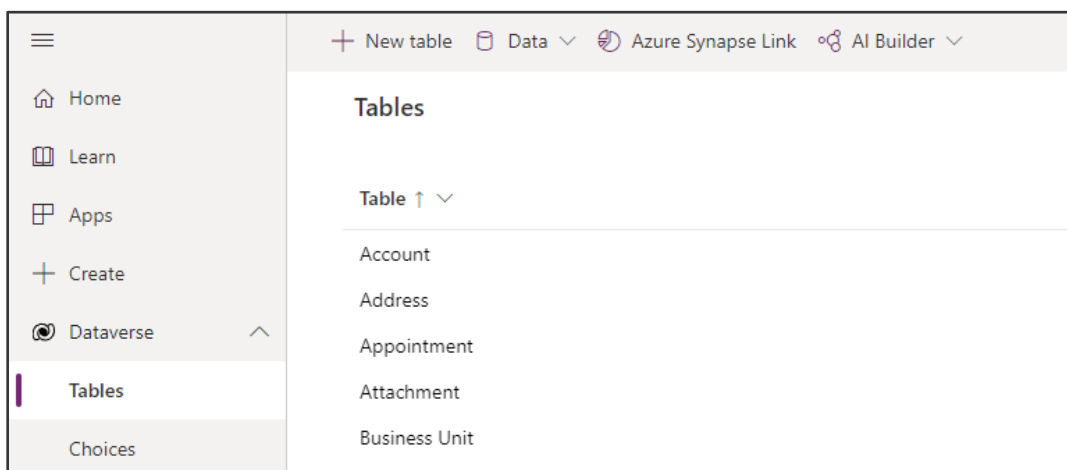
Task 1: Explore standard Tables

In this task, you will explore Microsoft Dataverse standard Tables.

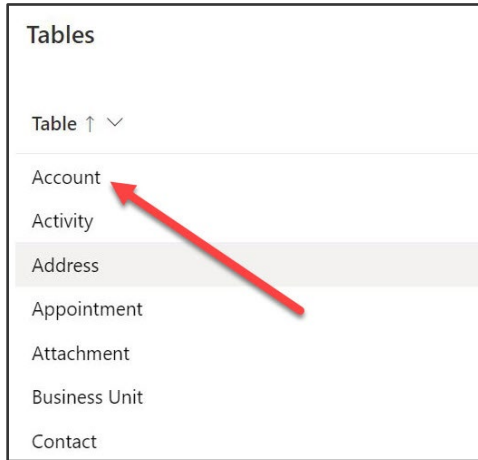
Before beginning the exercises, navigate to [Make Power Apps](#) and confirm that you are in the desired environment for the labs.



1. In the left pane, expand **Dataverse** and select **Tables**.



- This will bring up the list of tables in this environment. Click on a few of the standard Tables (for example, **Account**) to get familiar with some of the features of a table.



For detailed documentation on Microsoft Dataverse Tables, see <https://docs.microsoft.com/en-us/powerapps/developer/common-data-service/reference/about-entity-reference>

Table properties:

Here, you can find the table name, table type, table primary column, and table description. You can also copy table set name, schema name, or logical name via the tools button.

The screenshot shows the 'Table properties' page for the 'Account' table. The page is divided into several sections:

- Table properties:** A table with columns: Name, Primary column, and Description. The 'Name' column contains 'Account', 'Type' contains 'Standard', and 'Description' contains 'Business that represents a customer'. The 'Primary column' column contains 'Account Name' and 'Last modified'.
- Tools:** A dropdown menu with options: Copy set name, Copy schema name, Copy logical name, API link to table definition, and API link to table data.
- Schema:** A section with options: Columns, Relationships, and Keys.
- Data experiences:** A section with options: Forms, Views, Charts, and Dashboards.
- Customizations:** A section with options: Business rules and Commands.

Below these sections is a table titled 'Account columns and data' with columns: Address 1: City, Primary Contact, Main Phone, and Account Name. The table contains three rows of data:

Address 1: City	Primary Contact	Main Phone	Account Name
Redmond	Rene Valdes (sample)	555-0158	A. Datum Corporation (sample)
Santa Cruz	Nancy Anderson (sample)	555-0152	Adventure Works (sample)
Missoula	Paul Cannon (sample)	555-0157	Alpine Ski House (sample)

Table schema:

Here, you can navigate to the table columns, relationships, and keys. Select Columns.

Tables > Account

Table properties

Name	Primary column	Description
Account	Account Name	Business that represents a cus
Type	Last modified	The company that is billed in l
Standard	-	

Properties Tools

- Copy set name
- Copy schema name
- Copy logical name
- API link to table definition
- API link to table data

Schema

- Columns**
- Relationships
- Keys

Data experiences

- Forms
- Views
- Charts
- Dashboards

Customizations

- Business rules
- Commands

Account columns and data

Address 1: City	Primary Contact	Main Phone	Account Name	+133 more
Redmond	Rene Valdes (sample)	555-0158	A. Datum Corporation (sample)	
Santa Cruz	Nancy Anderson (sample)	555-0152	Adventure Works (sample)	
Missoula	Paul Cannon (sample)	555-0157	Alpine Ski House (sample)	

Edit

Columns:

A table has a list of columns. In the example below, the "Account" table has columns such as Account Name, Account Number, etc. Each column has a data type, such as Text, Number, etc. The data type is chosen when you create a column and is not changeable. The data type also defines many of the characteristics and behaviors of the column when your application runs. For example, a Choice column allows you to have a pre-defined list of values for use in your application. When this column is used on a form in a model-driven application the visual presentation is a drop-down control. The column helps to ensure data consistency and allows for built-in support for multi-language applications.

Tables > Account > Columns

Display name	Name	Data type	Managed	Customization
(Deprecated) Process Stage	Stageld	Unique identifier	Yes	No
(Deprecated) Traversed Path	TraversedPath	Single line of text	Yes	Yes
Account	AccountId	Unique identifier	Yes	Yes
Account Name <small>Primary name column</small>	Name	Single line of text	Yes	Yes
Account Number	AccountNumber	Single line of text	Yes	Yes
Account Rating	AccountRatingCode	Choice	Yes	Yes
Address 1	Address1_Composite	Multiple lines of text	Yes	Yes
Address 1: Address Type	Address1_AddressTypeCode	Choice	Yes	Yes
Address 1: City	Address1_City	Single line of text	Yes	Yes
Address 1: Country/Region	Address1_Country	Single line of text	Yes	Yes

For a list of supported data types, see [Microsoft Dataverse Supported Data Types](#)

Go back to the table by clicking on the browser back button.

Select **Relationships**.

Tables > Account

Table properties

Name	Primary column	Description
Account	Account Name	Business that represents a customer. The company that is billed in the account.
Type	Last modified	
Standard	-	

Properties
Tools

Copy set name
Copy schema name
Copy logical name
API link to table definition
API link to table data

Schema ⓘ

Columns
Relationships
Keys

Data experiences

Forms
Views
Charts
Dashboards

Account columns and data

Address 1: City	Primary Contact	Main Phone	Account Name
Redmond	Rene Valdes (sample)	555-0158	A. Datum Corporation (sample)
Santa Cruz	Nancy Anderson (sample)	555-0152	Adventure Works (sample)
Missoula	Paul Cannon (sample)	555-0157	Alpine Ski House (sample)

+133 more

Relationships:

Relationships allows you to manage relationships between Tables. Relationships supported are One to Many (1:N), Many to One (N:1) and Many to Many (N:N). Relationships also define the behavior that happens when actions occur on the primary Row in a 1:N relationship. For example, if the parent Row is deleted you can configure the relationship behavior so that all child Rows are also deleted or simply remove the reference.

Tables > Account > Relationships

Display name	Name	Related table	Relationship type	Managed	Customizable
(Deprecated) Process Stage	processstage_account	Process Stage	Many-to-one	Yes	No
Base Record ID	Account_DuplicateBaseRecord	Duplicate Record	One-to-many	Yes	No
Company Name	contact_customer_accounts	Contact	One-to-many	Yes	Yes
Connected From	account_connections1	Connection	One-to-many	Yes	Yes
Connected To	account_connections2	Connection	One-to-many	Yes	Yes
Created By	lk_accountbase_createdby	User	Many-to-one	Yes	Yes
Created By (Delegate)	lk_accountbase_createdonbehalfby	User	Many-to-one	Yes	Yes
Created By (External Party)	lk_externalparty_account_createdby	External Party	Many-to-one	Yes	Yes

Go back to the table by clicking on the browser back button.

Select **Keys**.

Tables > Account

Table properties

Name	Primary column	Description
Account	Account Name	Business that represents a customer or potential customer that is billed in business
Type	Last modified	
Standard	-	

Properties Tools

- Copy set name
- Copy schema name
- Copy logical name
- API link to table definition
- API link to table data

Schema

- Columns
- Relationships
- Keys**

Data experiences

- Forms
- Views
- Charts
- Dashboards

Account columns and data

Keys:

Allows you to view the lookup keys for the table. Keys can contain multiple columns to define a composite key. Keys enforce uniqueness, so they should not be used when there is a need to store duplicate values of columns used.

Tables > Account > Keys

Display name ↑ Name Columns Managed

We didn't find anything to show here

Go back to the table by clicking on the browser back button.

Table Data experience:

Here, you can navigate to the table forms, views, charts, and dashboards. Select **Forms**.

Properties Tools

Schema

- Columns
- Relationships
- Keys

Data experiences

- Forms**
- Views
- Charts
- Dashboards

Customizations

- Business rules
- Commands

Edit

Forms:

Forms provide the user interface that people use to interact with the data they need to do their work. It's important that the forms people use are designed to allow them to find or enter the information they need efficiently. You can create different types of forms like Quick Create, Quick View, Card, and a Main form. For some of these forms you can have more than one version, to accommodate for different user roles within your organization.

Tables > Account > Forms ▾					
Name ↑ ▾	Form type ▾	Status ▾	Managed ▾	Customizable ▾	
Account	⋮ Main	On	Yes	Yes	
account card	⋮ Quick View	On	Yes	Yes	
Account Card form	⋮ Card	On	Yes	Yes	
Account for Interactive experience	⋮ Main	On	Yes	Yes	
Account Hierarchy Tile Form	⋮ Quick View	On	Yes	Yes	
Account Quick Create	⋮ Quick Create	On	Yes	Yes	
Account Reference Panel	⋮ Quick View	On	Yes	Yes	
Information	⋮ Main	On	Yes	Yes	
Social Profiles	⋮ Quick View	On	Yes	Yes	

Go back to the table by clicking on the browser back button.

Select **Views**.

Properties
 Tools ▾

Schema ⓘ

Columns
 Relationships
 Keys

Data experiences ⓘ

Forms
 Views
 Charts
 Dashboards

Customizations ⓘ

Business rules
 Commands

Edit | ▾

Views:

Views will let you define how a list of Rows are shown in the app. You can create multiple custom views, each having their own filtering and sorting criteria. For example, you could create a view to see only the Rows created in the last week and

another one to see Rows that haven't been updated in a year. Create views to make the application users more productive in filtering their data.

Tables > Account > Views ▾		
Name ↑ ▾	View type ▾	Status ▾
Account Advanced Find View	Advanced Find View default	On
Account Associated View	Associated View default	On
Account BulkOperation View	Associated View	On
Account List Member View	Associated View	On
Account Lookup View	Lookup View default	On
Accounts: Influenced Deals That We Won	Public View	On

Go back to the table by clicking on the browser back button.

Select **Charts**.

Properties Tools ▾

Schema ⓘ

- Columns
- Relationships
- Keys

Data experiences ⓘ

- Forms
- Views
- Charts**
- Dashboards

Customizations ⓘ

- Business rules
- Commands

Edit ▾

Charts:

Use Charts to display high-level view of your data in insightful and graphical ways.

Tables > Account > Charts ▾

Name ↑ ▾	Managed ▾	Customizable ▾
Accounts by Industry	⋮ Yes	Yes
Accounts by Owner	⋮ Yes	Yes
Accounts by Owner - Tag Chart	⋮ Yes	Yes
New Accounts By Month	⋮ Yes	Yes

Go back to the table by clicking on the browser back button.

Select **Dashboards**.

Properties Tools ▾

Schema ⓘ

- Columns
- Relationships
- Keys

Data experiences ⓘ

- Forms
- Views
- Charts
- Dashboards**

Customizations ⓘ

- Business rules
- Commands


Edit ▾

Dashboards:

Dashboards helps you bring your views, charts, and web resources together in one place.

Tables > Account > Dashboards ▾

Name ↑ ▾Managed ▾Customizable ▾

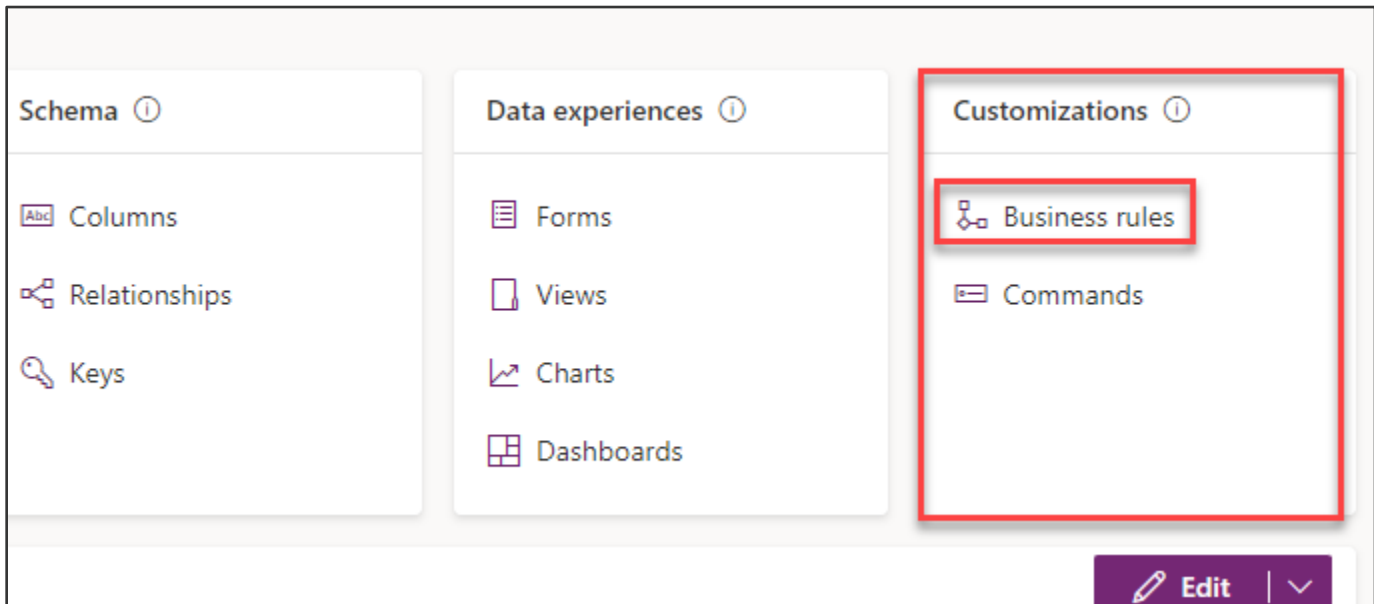


We didn't find anything to show here

Go back to the table by clicking on the browser back button.

Table Customizations:

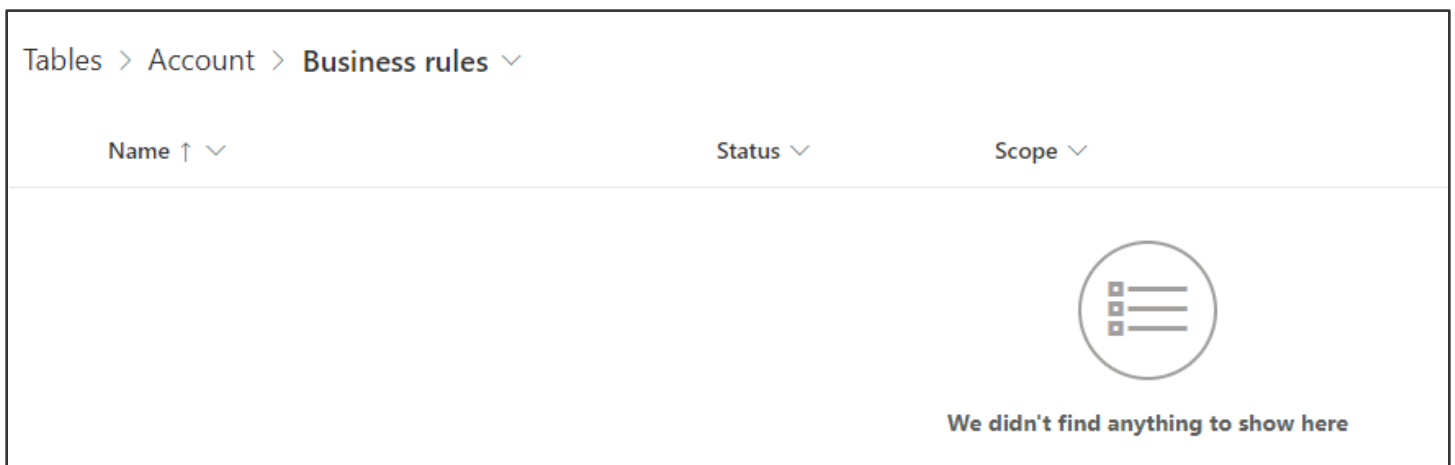
Here, you can navigate to the table business rules and commands. **Select Business rules.**



Business rules:

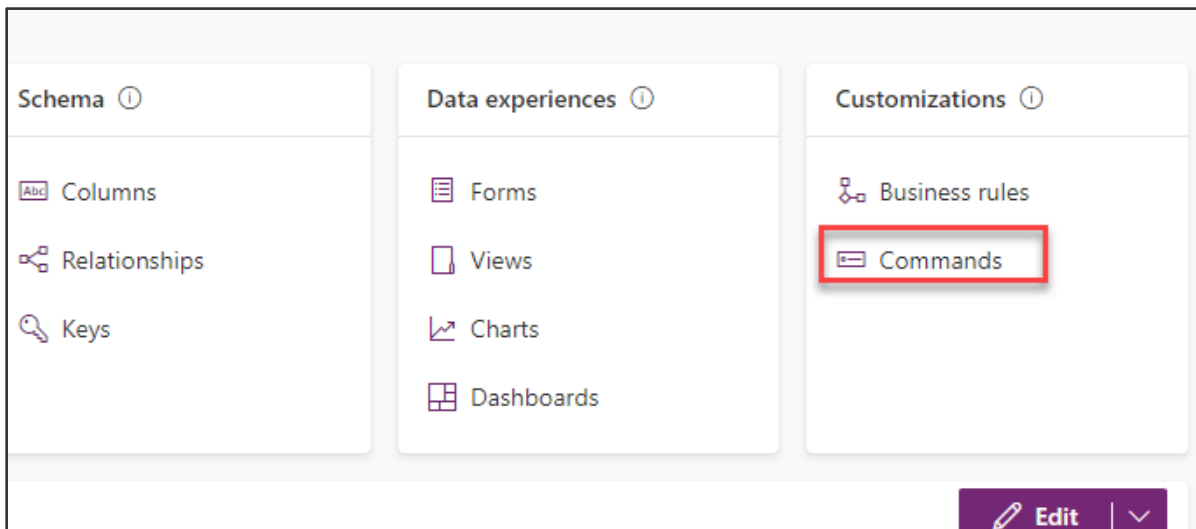
Building a Business Rule is like building a flowchart where you can define conditions and actions. You can learn more about Business rules in the link below.

Business Rules Recommendations: [Business Rules Recommendations](#)

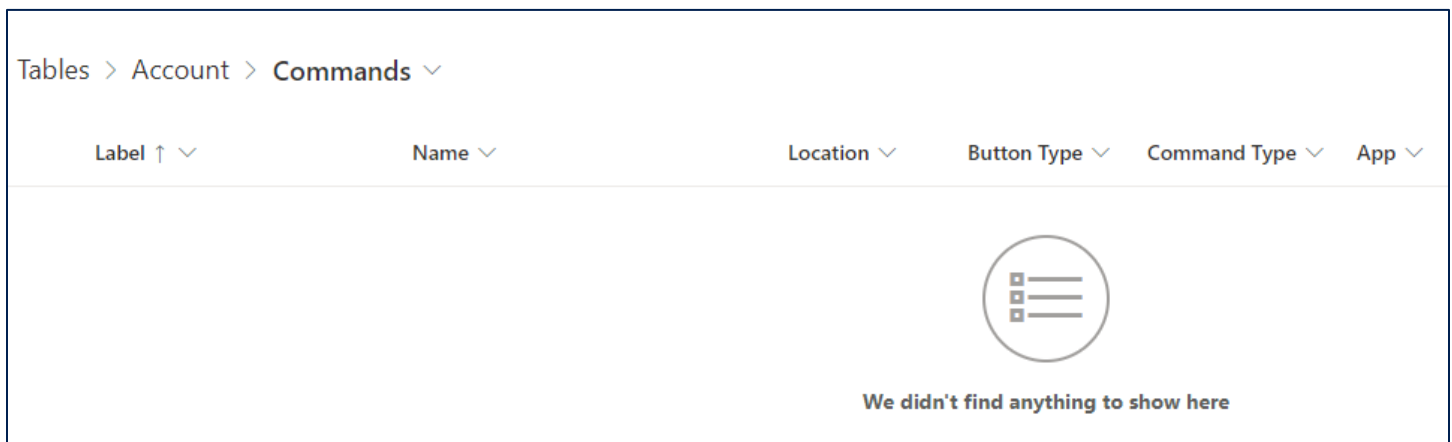


Go back to the table by clicking on the browser back button.

Select **Commands**.

**Commands:**

Microsoft Dataverse allows you to create your own command bar buttons. The commands added to this table will be listed here.



Go back to the table by clicking on the browser back button.

Table columns and data:

Here, you will see the first 10 rows of the table data. You can also see more columns via the show existing columns button, add new column via the + new column button, edit table data via the edit button, and order columns to your liking by dragging and dropping columns.

Account columns and data

	Address 1: City ▾	Primary Contact ▾	Main Phone ▾	Account Name * ↑ ▾	+133 more ▾
	Redmond	Rene Valdes (sample)	555-0158	A. Datum Corporation (sample)	
	Santa Cruz	Nancy Anderson (sample)	555-0152	Adventure Works (sample)	
	Missoula	Paul Cannon (sample)	555-0157	Alpine Ski House (sample)	
	Los Angeles	Sidney Higa (sample)	555-0154	Blue Yonder Airlines (sample)	
	Redmond	Scott Konersmann (sample)	555-0155	City Power & Light (sample)	
	Phoenix	Jim Glynn (sample)	555-0159	Coho Winery (sample)	
	Redmond	Robert Lyon (sample)	555-0156	Contoso Pharmaceuticals (sample)	

Annotations: Edit, Show existing columns, New column

Select the **Edit** button.

Table Edit:

Here you can create a new row, create a new column, refresh the data to see the latest rows, create an app from the data, and edit the table properties.

← Back + New row + New column Refresh Create an app Edit table properties

Accounts

	Address 1: City ▾	Primary Contact ▾	Main Phone ▾	Account Name * ↑ ▾	+133 more ▾
	Redmond	Rene Valdes (sample)	555-0158	A. Datum Corporation (sample)	
	Santa Cruz	Nancy Anderson (sample)	555-0152	Adventure Works (sample)	
	Missoula	Paul Cannon (sample)	555-0157	Alpine Ski House (sample)	
	Los Angeles	Sidney Higa (sample)	555-0154	Blue Yonder Airlines (sample)	
	Redmond	Scott Konersmann (sample)	555-0155	City Power & Light (sample)	
	Phoenix	Jim Glynn (sample)	555-0159	Coho Winery (sample)	

You can delete one or more rows by selecting the row/s you would like to delete. DO NOT delete rows.

← Back Delete 2 record(s)

Accounts

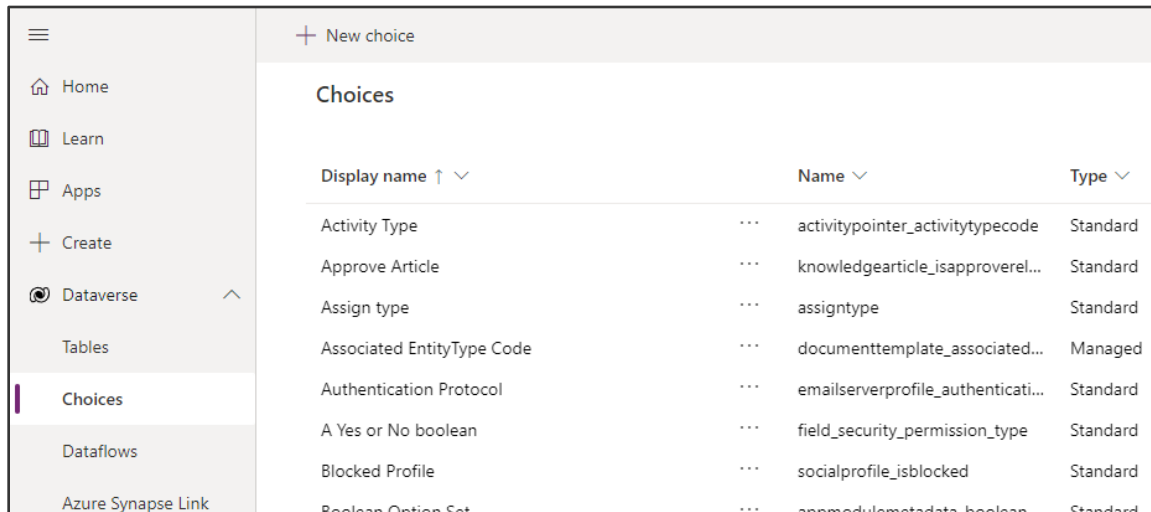
	Address 1: City ▾	Primary Contact ▾	Main Phone ▾	Account Name * ↑ ▾	+133 more ▾
	Redmond	Rene Valdes (sample)	555-0158	A. Datum Corporation (sample)	
✓	Santa Cruz	Nancy Anderson (sample)	555-0152	Adventure Works (sample)	
✓	Missoula	Paul Cannon (sample)	555-0157	Alpine Ski House (sample)	
	Los Angeles	Sidney Higa (sample)	555-0154	Blue Yonder Airlines (sample)	
	Redmond	Scott Konersmann (sample)	555-0155	City Power & Light (sample)	
	Phoenix	Jim Glynn (sample)	555-0159	Coho Winery (sample)	

Click on the ← Back button.

Task 2: Explore Standard Choices

Just like standard tables, the Microsoft Dataverse includes a set of standard **Choices**. You can also create custom **Choices**. Later in this lab, we will create a custom **Choice** called **ApprovalStatus** to set the approval status of a machine order.

1. Select **Choices** from underneath the expanded **Dataverse**.



+ New choice			
Choices			
Display name ↑ ↓		Name ↓	Type ↓
Activity Type	...	activitypointer_activitytypecode	Standard
Approve Article	...	knowledgearticle_isapproverel...	Standard
Assign type	...	assigntype	Standard
Associated EntityType Code	...	documenttemplate_associated...	Managed
Authentication Protocol	...	emailserverprofile_authenticati...	Standard
A Yes or No boolean	...	field_security_permission_type	Standard
Blocked Profile	...	socialprofile_isblocked	Standard
Boolean Option Set	...	systemmodulemetadata_boolean	Standard

2. Examine the standard **Choices**.

Display name ↑ ↓		Name ↓	Type ↓
Activity Type	...	activitypointer_activitytypecode	Standard
Approve Article	...	knowledgearticle_isapproverel...	Standard
Assign type	...	assigntype	Standard
Associated EntityType Code	...	documenttemplate_associated...	Managed
Authentication Protocol	...	emailserverprofile_authenticati...	Standard
A Yes or No boolean	...	field_security_permission_type	Standard

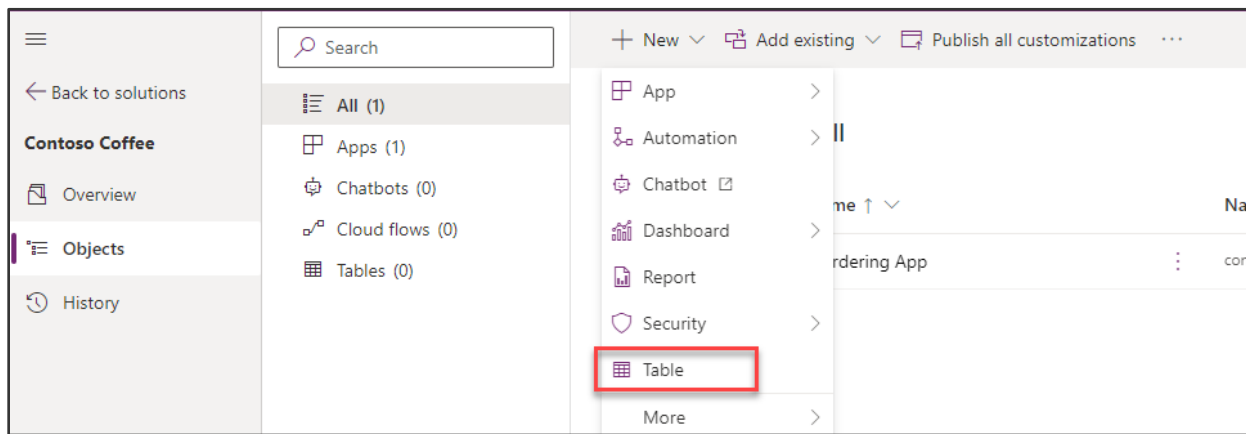
Exercise 2: Custom Tables and Columns

In this exercise, you will create a new custom table named Machine Order and add columns necessary to track the machine requests. You will also create a server-side Business Rule that will default the estimated ship date.

Task 1: Create a custom table

In this task, you will create a custom table to store machine order requests.

1. Select **Solutions** and click to open the **Contoso Coffee** solution.
2. Click **+ New** and select **Table**.



3. Enter **Machine Order** for Display Name. The Plural name will automatically populate based on your entry. These are editable in case you need to make any changes. The plural name is used by the system by default anytime a set of the Rows are shown. Check the **Enable attachments** since this will allow creating notes on the machine order.

New table

Use tables to hold and organize your data. Previously called entities
[Learn more](#)

Properties Primary column

Display name *

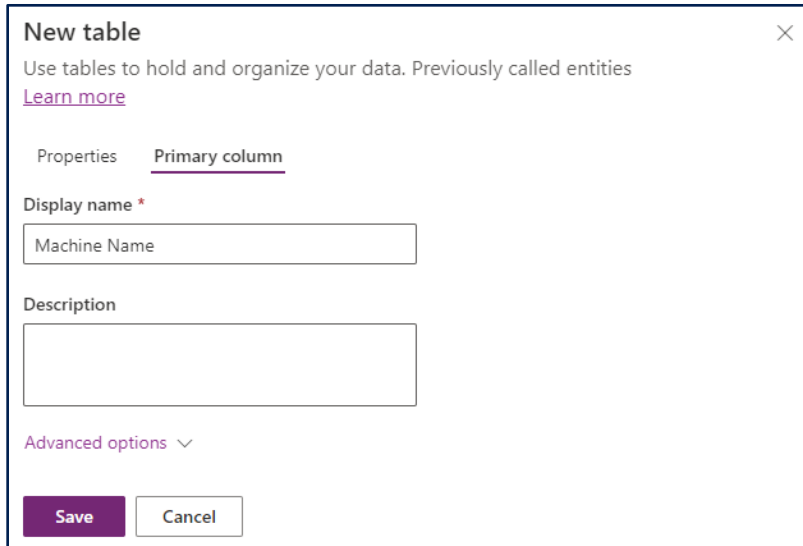
Plural name *

Description

☒ Enable attachments (including notes and files) ¹

[Advanced options](#) ▾

4. Select the **Primary column** tab.
5. Change the **Display Name** to **Machine Name**. The primary column defaults to being named Name, for some scenarios that might not be the best label and you can customize it if needed. The primary column however is always a Text column, that is not changeable.
6. Click **Save**.



New table ×

Use tables to hold and organize your data. Previously called entities
[Learn more](#)

Properties **Primary column**

Display name *
Machine Name

Description

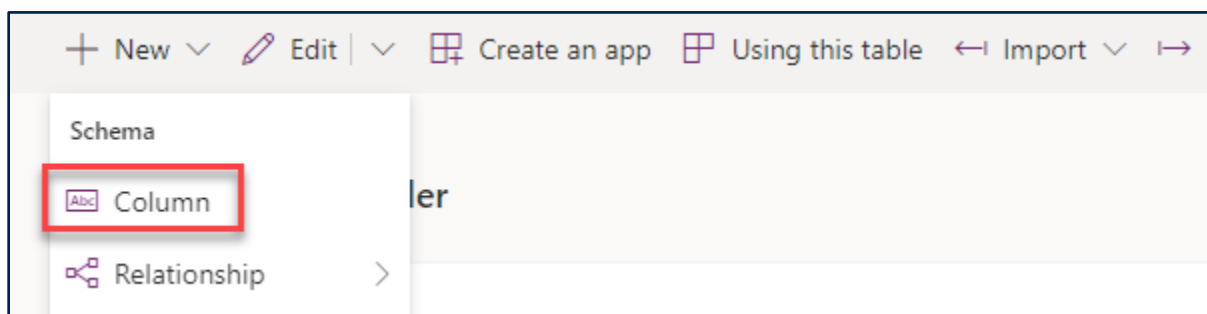
Advanced options ▼

Save Cancel

Task 2: Create custom columns

In this task, you will create custom columns for the Machine Order table. It may take a few minutes for your new Machine Order table to provision. Begin these steps once it has finished.

1. Click to open the **Machine Order** table you created.
2. Click **+ New** and select **Column**.



3. Enter **Price** for **Display Name**, type **Machine Price** for description, select **Currency** for **Data Type**, make the column **Business Required** and **Searchable** and click **Advanced Options**.

Note: Currency is a special data type that allows you to build multi-currency solutions. For each currency column you add, another currency column is added with the prefix "_Base" on the name. This column stores the calculation of the value of the currency column you added and the base currency. For additional information on using the Currency column, see [here](#).


New column

Previously called fields. [Learn more](#)

Display name *

Description ⓘ

Data type * ⓘ

 Currency

Behavior ⓘ

Simple

Required ⓘ

Business required

☒ **Searchable ⓘ**

Advanced options

4. Enter **0** for **Minimum Value**, **50000** for **Maximum Value**, and click **Save**.

Minimum value *

Maximum value *

Precision source *

Currency precision

Input method editor (IME) mode *

Auto

General

☐ Enable column security ⓘ

Dashboard

☐ Appears in dashboard's global filter ⓘ

Save

Cancel

- Click **+ New** and select **Column** again.
- Enter **Requested By** for **Display Name**, **Single line of text** for **Data type**, **Email** for **Format**, make the column **Searchable** and click **Save**.

New column

Previously called fields. [Learn more](#)

Display name *

Description ⓘ

Data type * ⓘ

Format *

Behavior ⓘ

Required ⓘ

☒ Searchable ⓘ

[Advanced options](#) ▾

Save **Cancel**

- Now repeat the Add Column process and add the following columns

Display Name	Data type	Format
Request Date	Date and time	Date only
Approver	Single line of text	Email
Comments	Multiple lines of text	Text
Estimated Ship Date	Date and time	Date only
Approved Date	Date and time	Date only

- Now we are going to create the **Approval Choice**. We are adding this as a Choice (as opposed to a two option) because it is likely in the future there will be more than Yes/No for users to choose from. Click **+ New** and select **Column**.
- Enter **Approval Status** for **Display Name**, select **Choice** for **Data Type**, select **No** for Sync with global choice, enter **Approve** for Label and click **+ New choice**.

Display name *

Approval Status

Description ⓘ

Data type * ⓘ

Choice

Behavior ⓘ

Simple

Required ⓘ

Optional

☒ **Searchable ⓘ**



☐ Selecting multiple choices is allowed

Sync with global choice? *

☐ Yes (recommended)
Can be used in multiple tables, and will stay updated everywhere.

☒ **No**
Creates a local choice that can only be used in one table. People using it can add new choices.







Choices Sort ▾

	Label *	Value *	
⋮	<input type="text" value="Approve"/>	<input type="text" value="853,500,000"/>	 
<input type="button" value="+ New choice"/>			

10. Enter **Reject** for Label and click **Save**.

Choices

Sort ▾

	Label *	Value *	
⋮ 	Approve	853,500,000	 
⋮ 	Reject	853,500,001	 

+ New choice

Default choice *

None ▾

Advanced options ▾

Save

Cancel

Task 3: Create a calculated column

In this task, you will add a Department Contribution column and set its value to 10% of the price. In our scenario, this is the amount that will come from the department manager's budget. Calculated columns are special columns that automatically perform the calculation when the data is retrieved. When you create or modify a calculated column you set the formula used in the calculation.

1. Click **+ New** and select **Column**.
2. Enter **Department Contribution** for **Display Name**, **Currency** for **Data Type**, and select **Calculated** for **Behavior**.

New column
Previously called fields. [Learn more](#)

Display name *
Department Contribution

Description ⓘ

Data type * ⓘ
Currency

Behavior ⓘ
Simple
Simple
Calculated
Rollup

3. Click **Save and Edit**.

Behavior ⓘ
Calculated

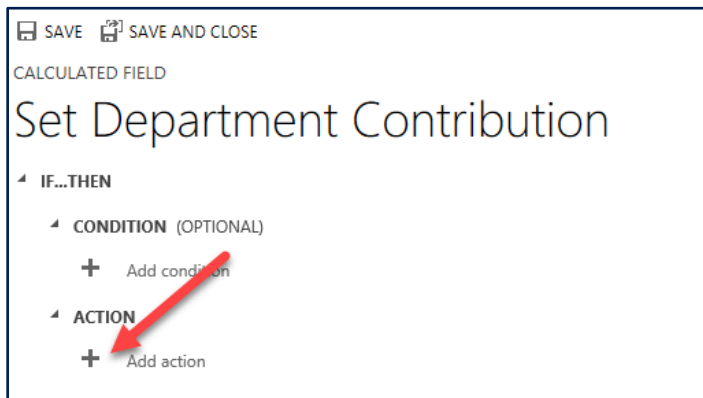
First save the column in order to edit the calculation.

Save and edit

4. If you have not yet allowed popups from Power Apps, you will be prompted to do so now.

Microsoft Edge blocked a pop-up from make.powerapps.com. [Allow once](#) [Always allow](#) [×](#)

5. Click **Add Action**.



SAVE SAVE AND CLOSE

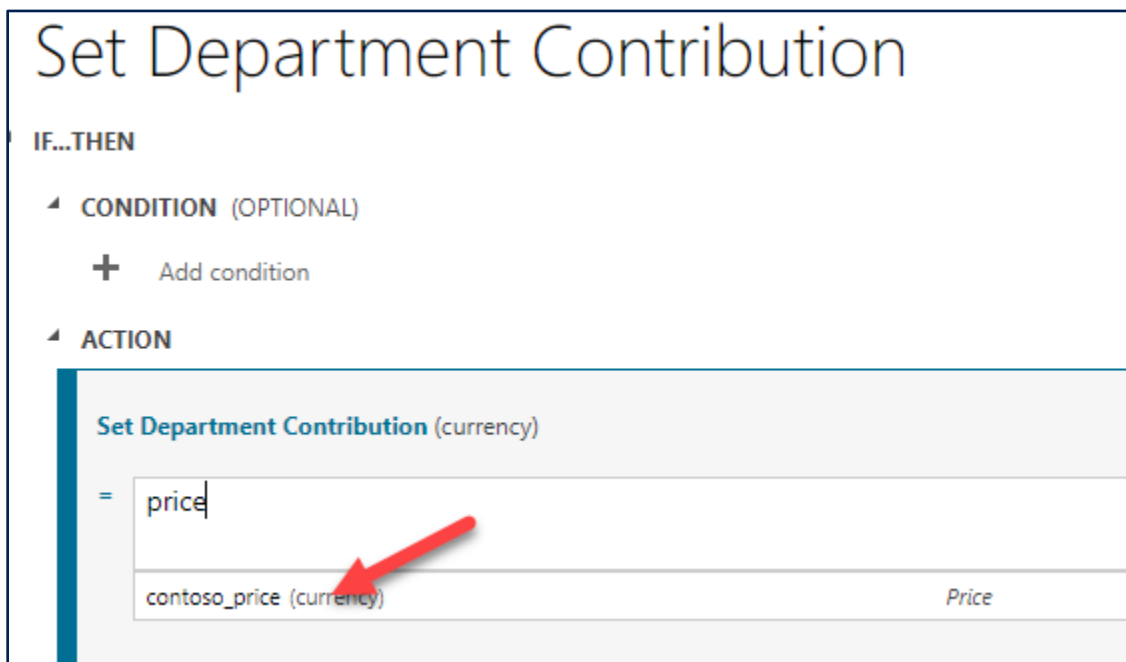
CALCULATED FIELD

Set Department Contribution

IF...THEN

- CONDITION (OPTIONAL)
 - + Add condition
- ACTION
 - + Add action

6. Type price and select the **Price** column you created.

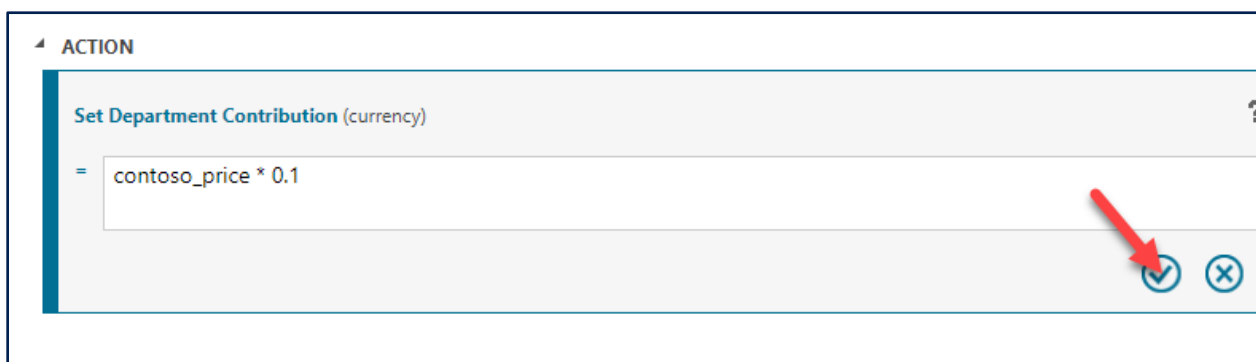


Set Department Contribution

IF...THEN

- CONDITION (OPTIONAL)
 - + Add condition
- ACTION
 - Set Department Contribution (currency)
 - = price
 - contoso_price (currency) Price

7. Add *** 0.1** and click the **Check Mark** button.



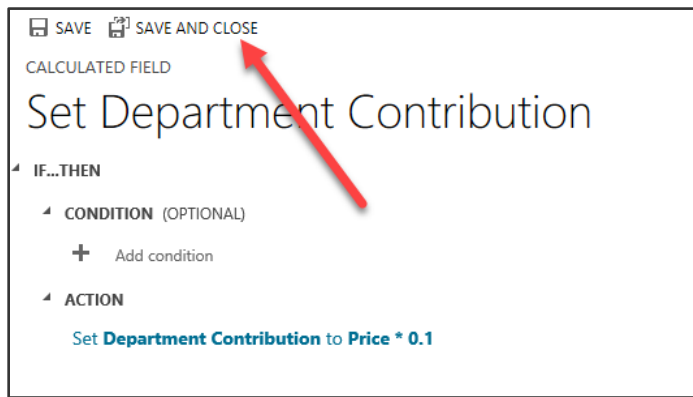
ACTION

Set Department Contribution (currency) ?

= contoso_price * 0.1

✓ ✕

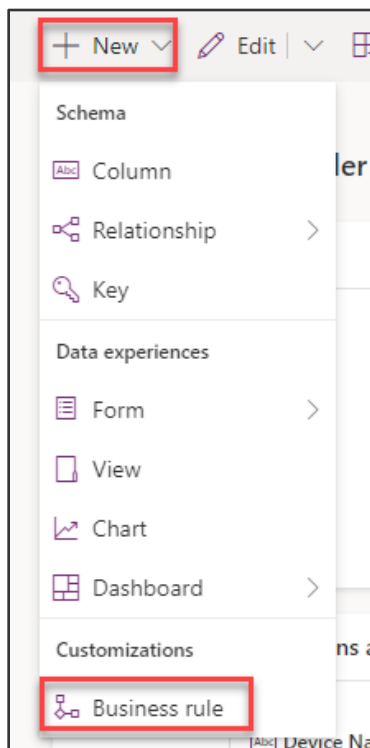
8. Click **Save and Close**.



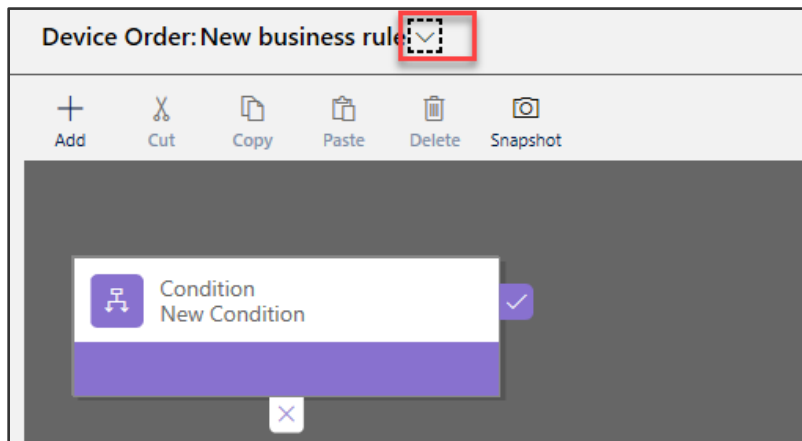
Task 4: Create a business rule

In this task, you will create a **Business rule** that will set the Estimated Delivery Date to 14 days after approval of the order.

1. Click **+ New** and select **Business rule**.



2. Click the arrow to **Show Details**.



3. Change the **Name** to **Calculate Ship Date** and click the arrow to **Hide Details**.

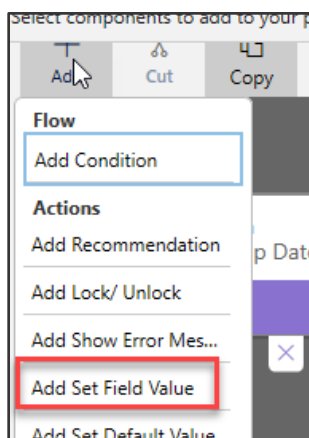
4. Select the **Condition**, change the name to **Check Approved Date**.

5. In the **Rule 1** section select **Entity** for **Source**, **Approved Date** for **Field**, **Contains Data** for **Operator** and click **Apply**.

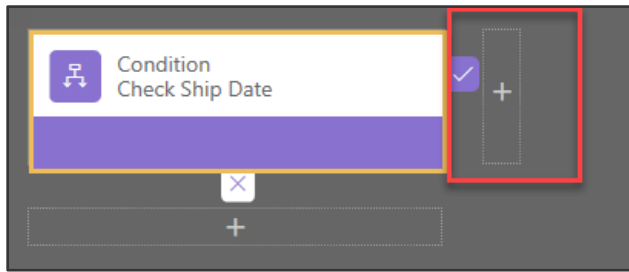
Note: You may need to scroll down to the bottom of all scroll bars to see the Apply button. You must click Apply after any change to the properties otherwise they will revert to the prior value. The Business Rule (Text View) will automatically update after you hit apply when you are done modifying the rule.

The screenshot shows the 'Properties' pane in the Power Platform interface. It is divided into three sections: 'Condition', 'Entity', and 'Rules'.
- The 'Condition' section has a 'Display Name' field with the value 'Check Ship Date'.
- The 'Entity' section has a field with the value 'Machine Order'.
- The 'Rules' section has a '+ New' button and a list of rules. 'Rule 1' is selected and expanded, showing:
 - 'Source': Entity
 - 'Field': Approved Date
 - 'Operator': Contains data
 - 'Condition Expression (Text View)': (Approved Date Contains data)
At the bottom of the pane are an information icon, an 'Apply' button, and a 'Discard' button.

6. Click **Add**, select **Add Set Field Value**.



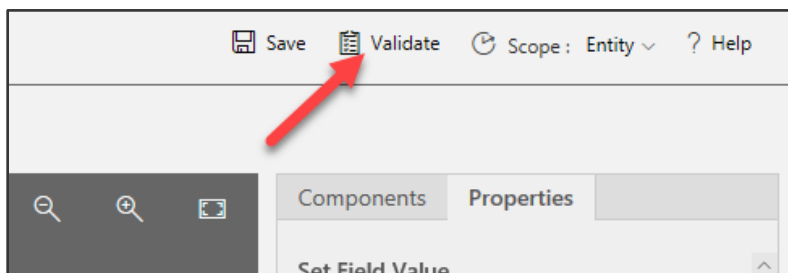
7. Select the True side of the condition.



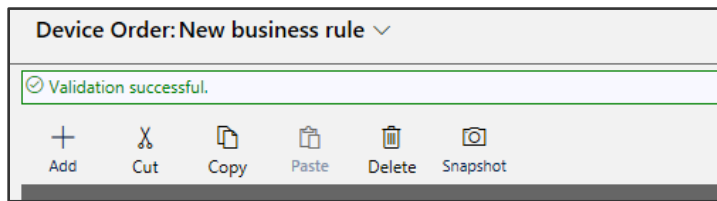
8. Enter **Set Estimated Ship Date** for **Display Name**, select **Estimated Ship Date** for **Field**, **Formula** for **Type**, **Approved Date** for **Field**, **+** for **Operator**, **Value** for **Type**, **14** for **Days**, and click **Apply**.

A screenshot of the 'Set Field Value' configuration panel in the Power Platform interface. The panel has two tabs: 'Components' and 'Properties'. Under 'Properties', the following fields are visible: 'Display Name' (Set Estimated Ship Date), 'Entity' (Machine Order), 'Field Value' section containing 'Field' (Estimated Ship Date), 'Type' (Formula), 'Field' (Approved Date), 'Operator' (+), 'Type' (Value), and 'Days' (14). At the bottom, there are 'Apply' and 'Discard' buttons.

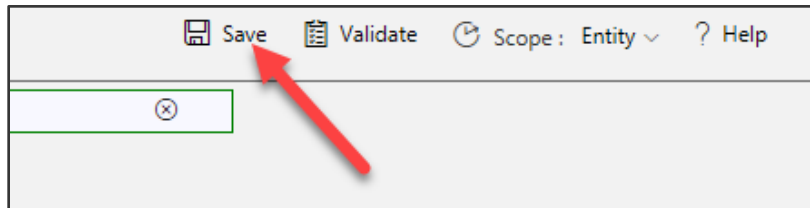
9. Click **Validate**.



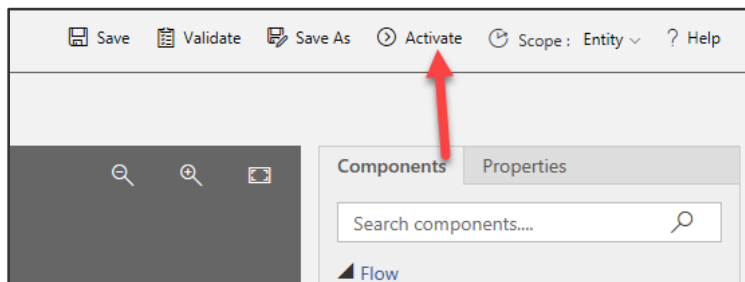
10. Make sure validation succeeds.



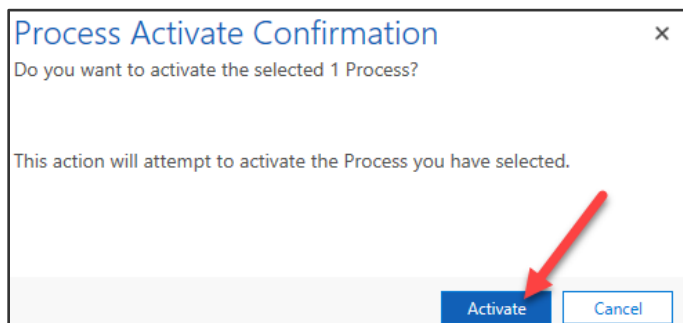
11. Click **Save**.



12. Click **Activate**.

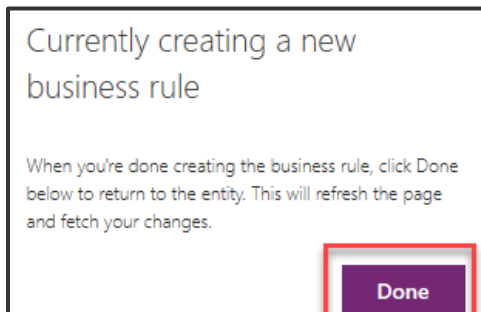


13. Confirm activation. Business rules only execute when they are activated. In the future to make changes to rules you deactivate them, make the change, and then re-activate the rule.



14. Close the process editor browser window or tab.

15. Click **Done**. The list should refresh showing the Business Rule you just created.



16. Do not navigate away from this page

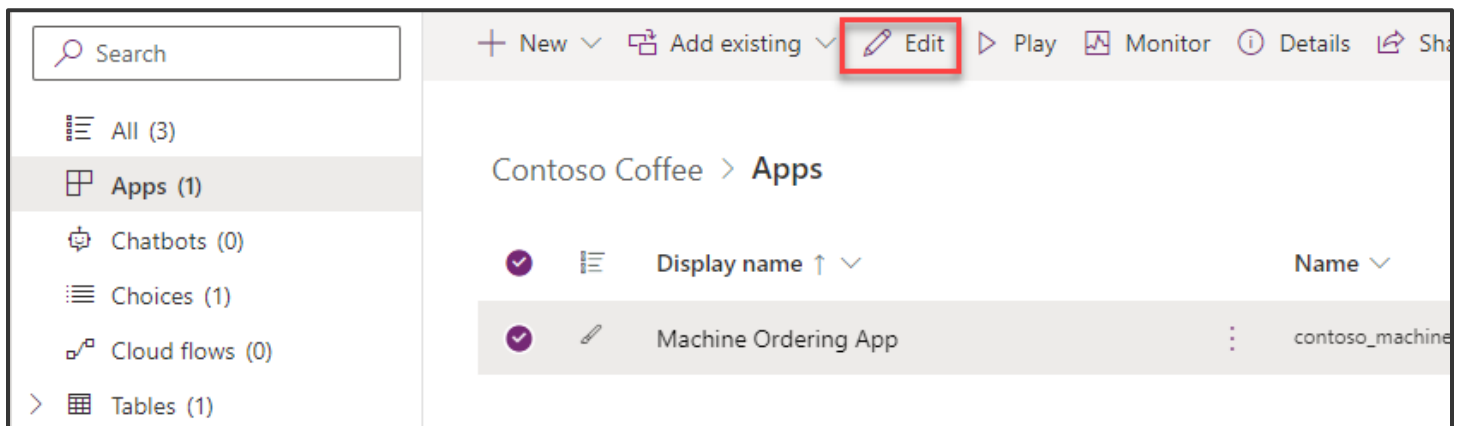
Exercise 3: Connect the data from the Canvas App

Now that you have created the table to store machine order requests let's connect your Machine Ordering Canvas app to this table and add a form to submit machine approval requests.

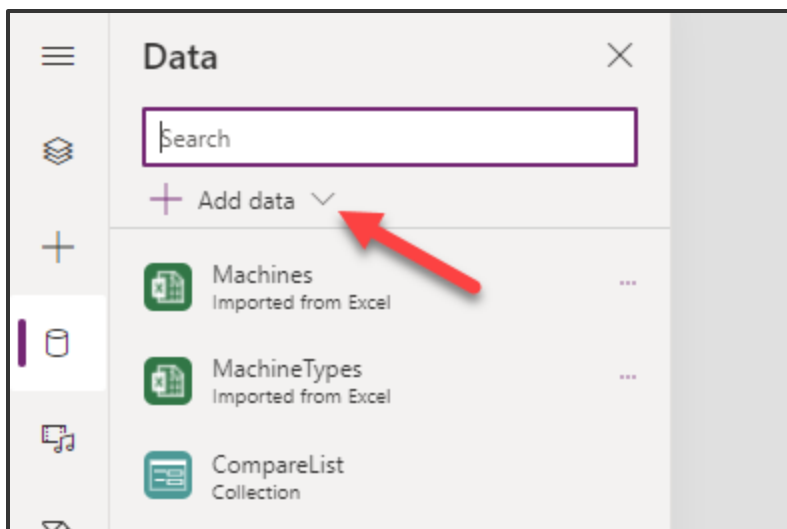
Task 1: Add Microsoft Dataverse table as a data source to the app

Open the machine ordering app. Make sure you are opening the version of the app that is in the newly created environment that has the Microsoft Dataverse database instance.

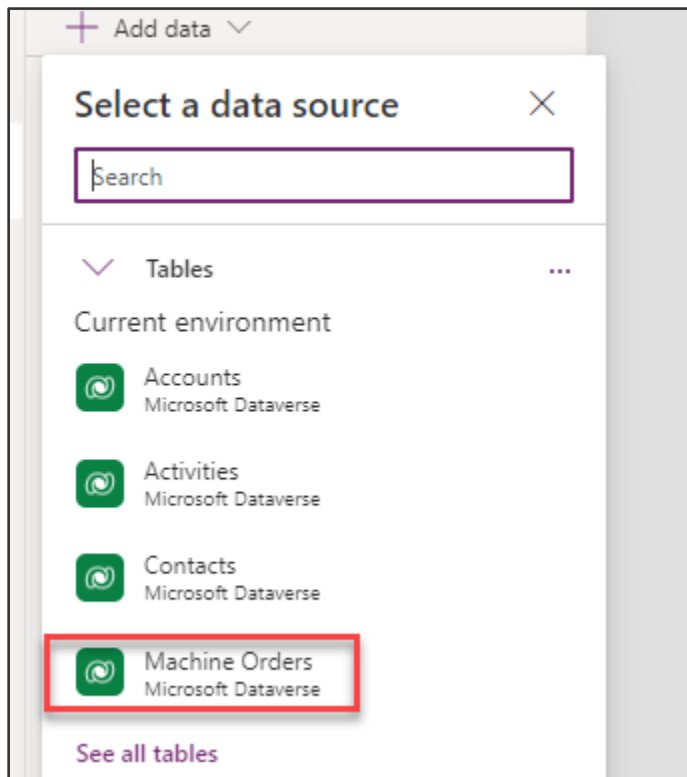
1. Select **Apps**, select the **Machine Order App** you created in Module 1, and click **Edit**.



2. Select the **Data sources** to display the current sources. Select **+ Add Data**.

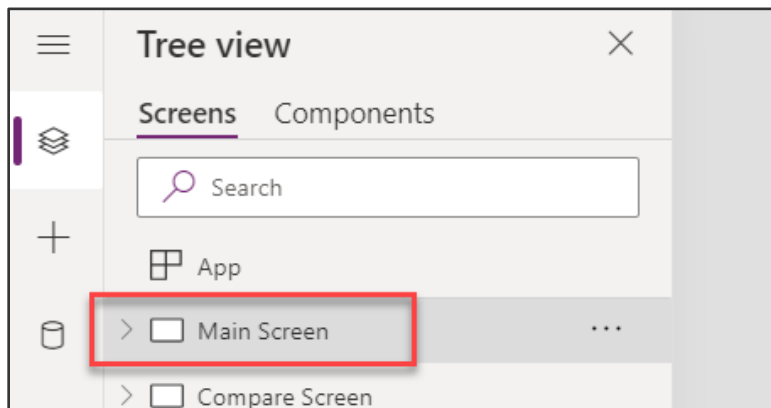


3. Click on **Machine Orders** from the table list to include it as a data source for our app.

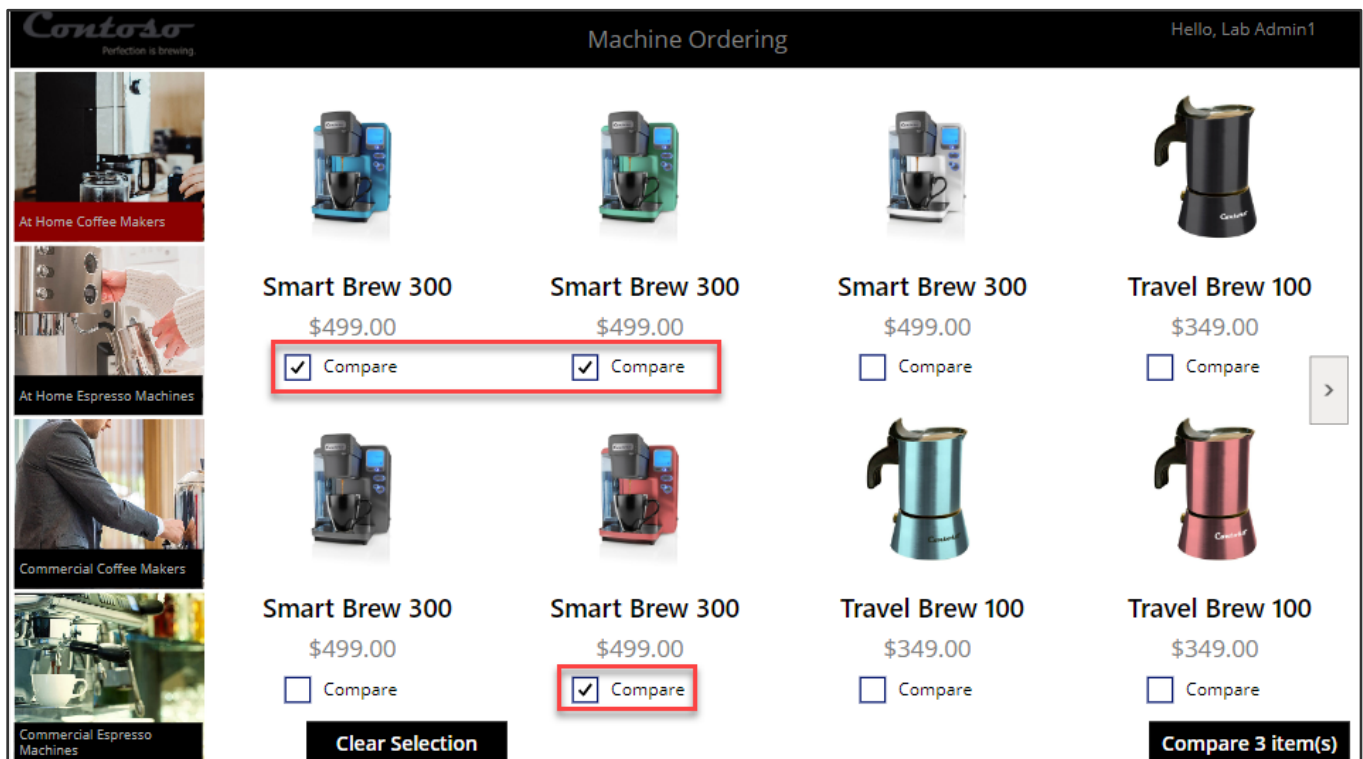


Task 2: Create the edit form

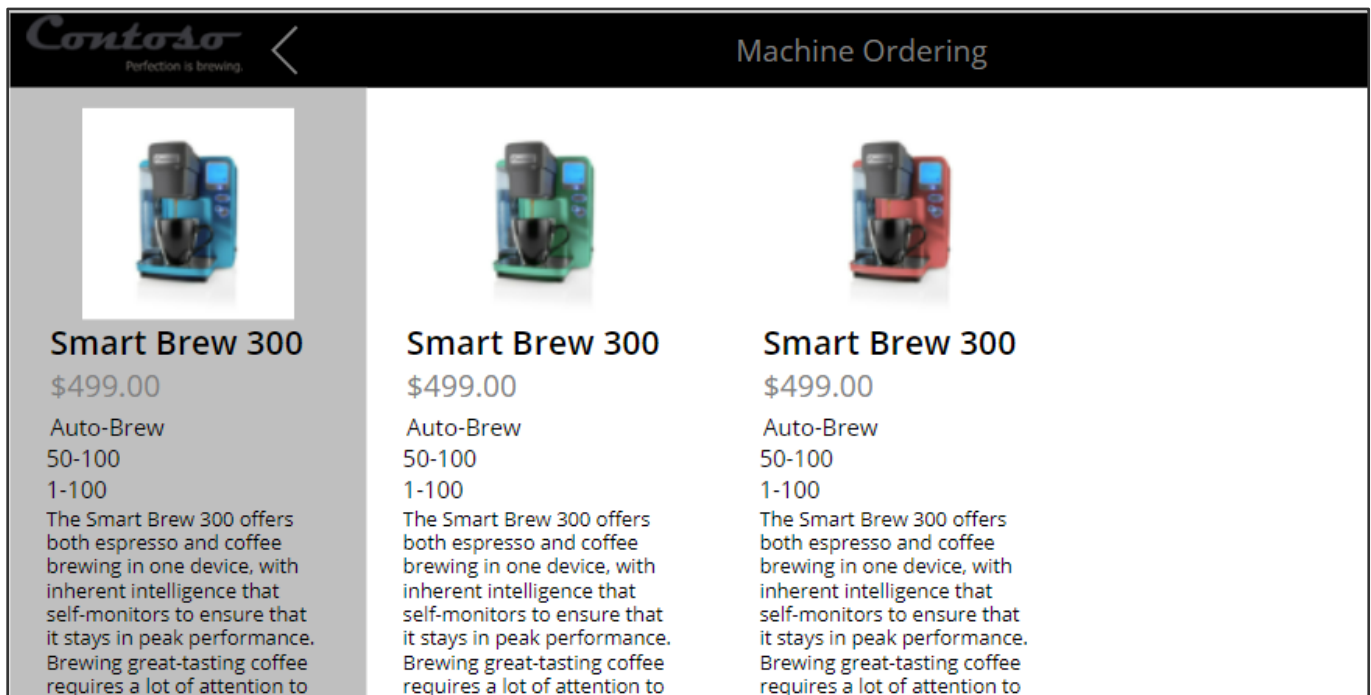
1. Switch to the **Tree view** and select the **Main Screen**.



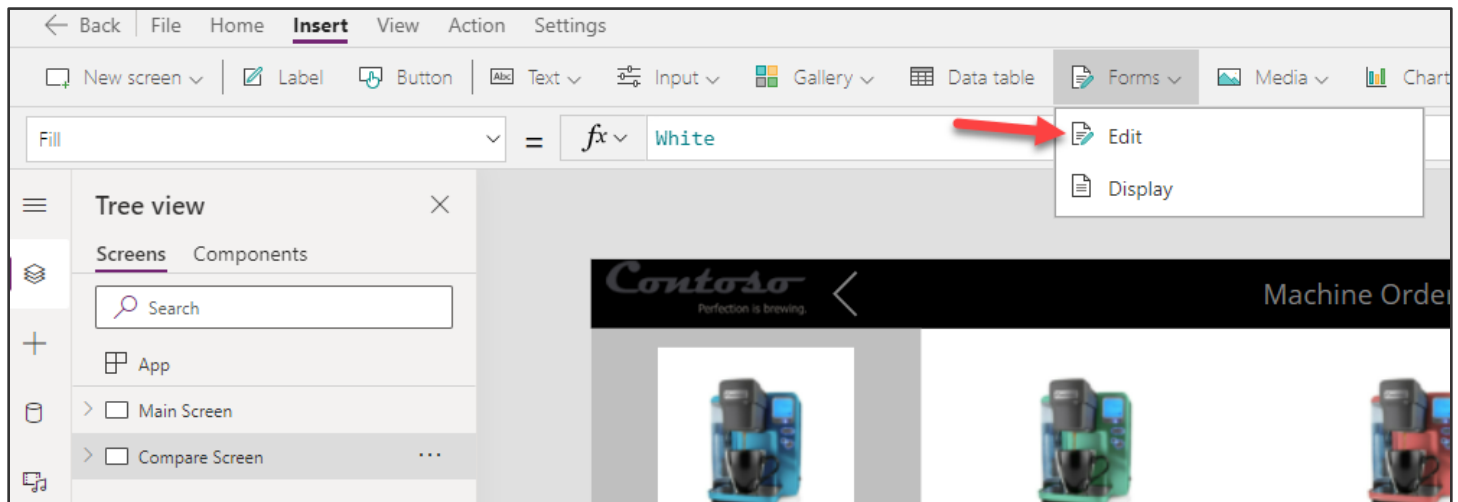
2. Select few machines. Hold the "Alt" key, and then it will allow you to check the compare check box.



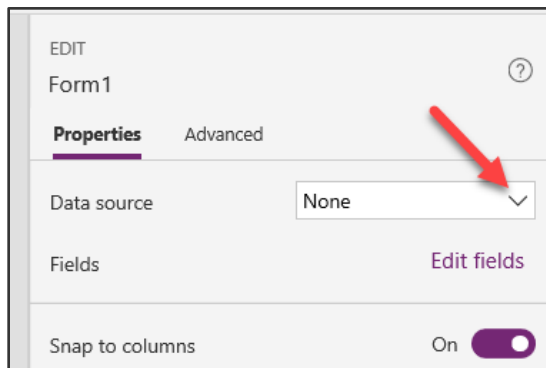
3. Select the **Compare Screen**. You should now have the selected machines.



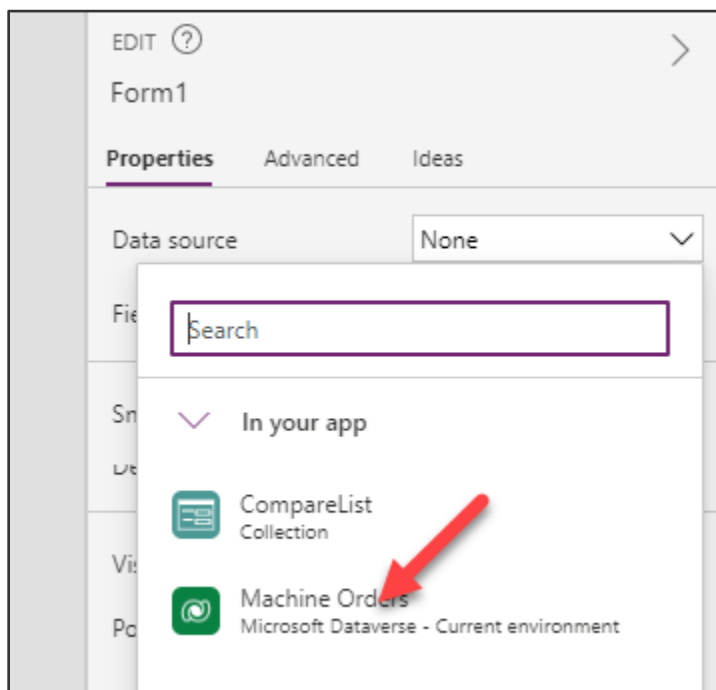
4. Select the **Insert** tab, click **Forms**, and select **Edit**.



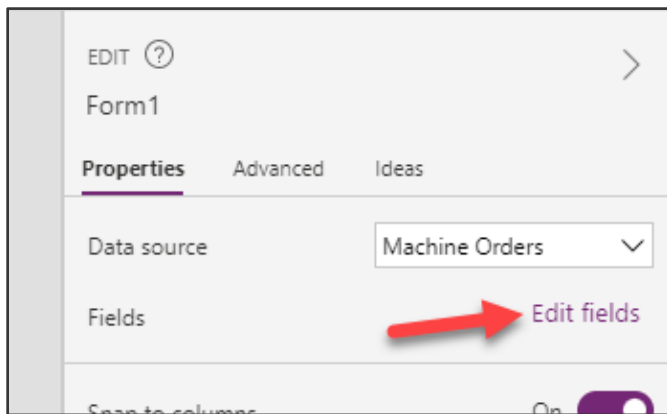
5. Click the **Data Source** drop-down in the Data pane on the right.



6. Select the **Machine Orders** table as the data source.

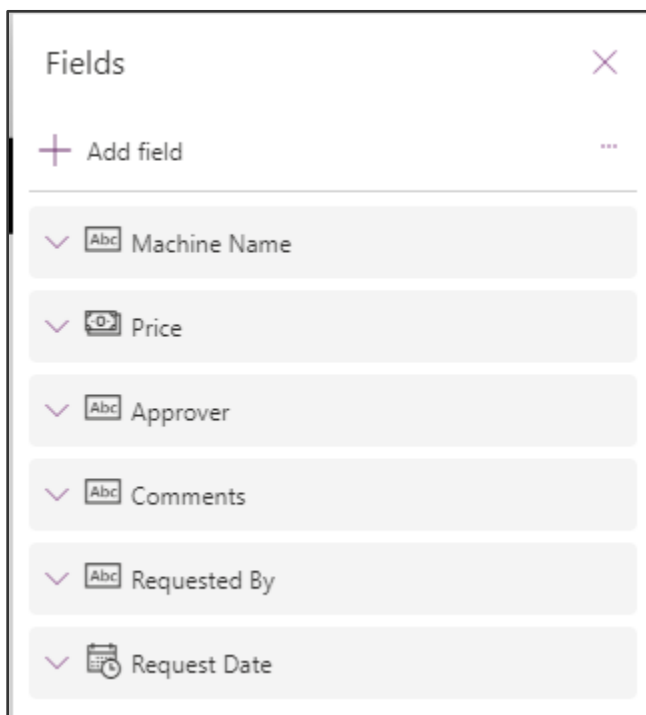


7. Click **Edit Fields**.

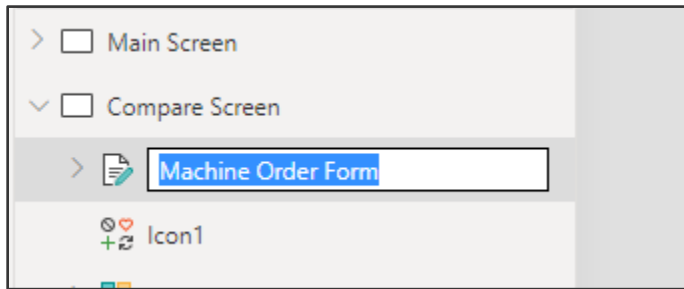


8. Add, remove, and order fields like the list below. The fields are added using the plus sign and can be reordered by dragging the field to the desired placement.

- a. Machine Name
- b. Price
- c. Approver
- d. Comments
- e. Requested By
- f. Request Date



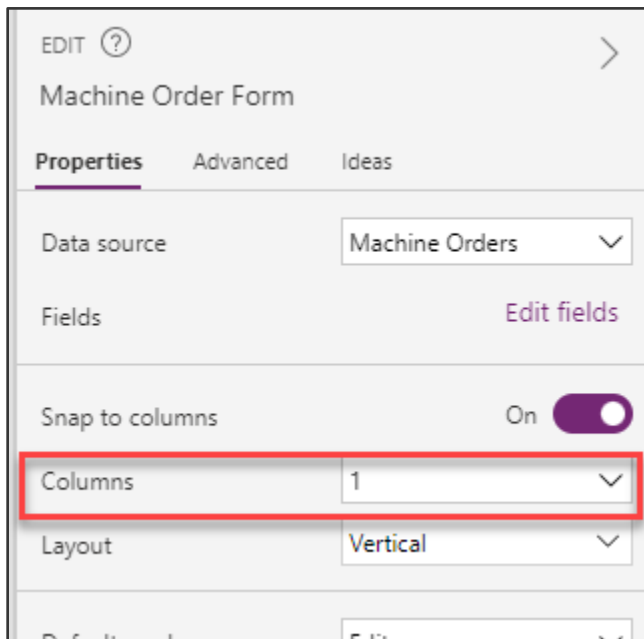
9. Close the **Fields** pane.
10. Rename the form **Machine Order Form**.



11. Select the **Machine Order Form**.
12. Set the **X** value of the **Machine Order Form** to **840**.
13. Set the **Y** value of the **Machine Order Form** to **60**.
14. Set the **Width** value of the **Machine Order Form** to **520**.
15. Set the **Height** value of the **Machine Order Form** to **650**.

Parent.Height - 'Header Label_1'.Height - 60

16. Change the **Snap to columns** setting from 3 to 1. This will modify the layout of the edit form to be single column.

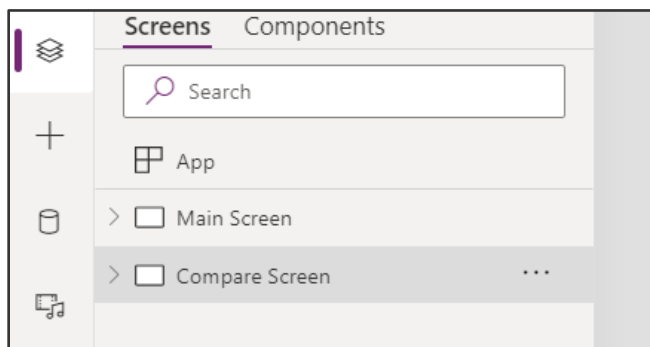


17. The form should now look like the image below.

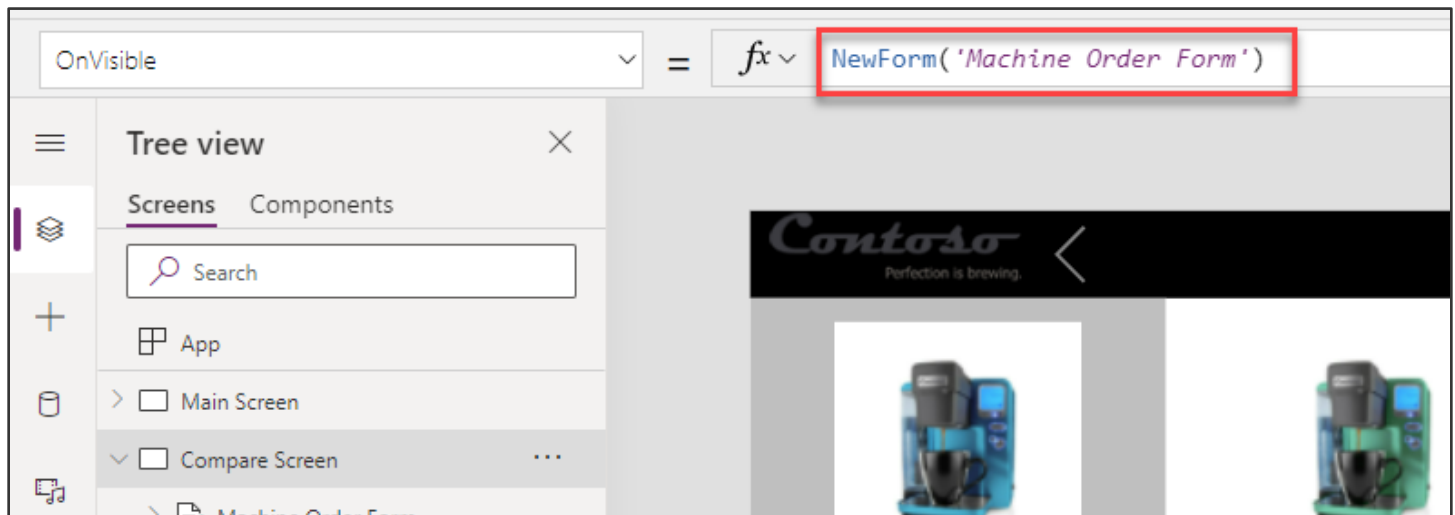
Note: You can always select controls, such as the Form1 control, from the tree view on the left to make sure you are selecting the correct control. To move it make sure you select the Form and not a control within the form.

For more info on working with multi-column form layouts, see [Working with forms layout](#).

18. To create a new instance of the form when the screen is loaded. Click **Compare Screen** in left tree view pane.



19. Select the **OnVisible** property of the screen, enter: `NewForm('Machine Order Form')`

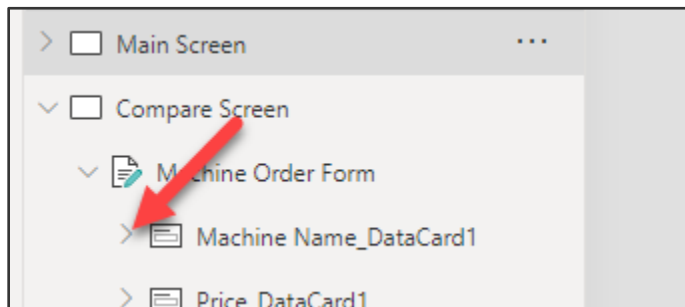


Task 3: Configure the title column

In the next few steps, you will configure each of the form Fields.

Let's start by configuring the Title to display the machine type and machine name for the selected machine. For example, if the user selects the Smart Brew 300 coffee makers, we want the machine order to have the title: "At home coffee makers – Smart Brew 300".

1. Expand the **Machine Name**.



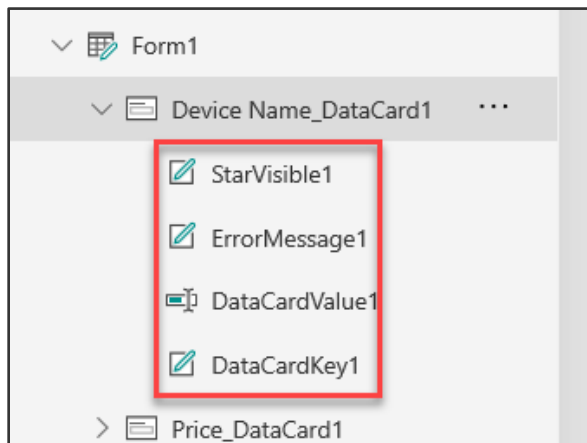
Notice that the default card contains a few controls:

StarVisible1: This is a label control that has an asterisk (*) which has its Visible property set to true or false depending on whether the Field is Required or not. Since the Title Field was marked as Required when you configured the table, its Required property is set to true.

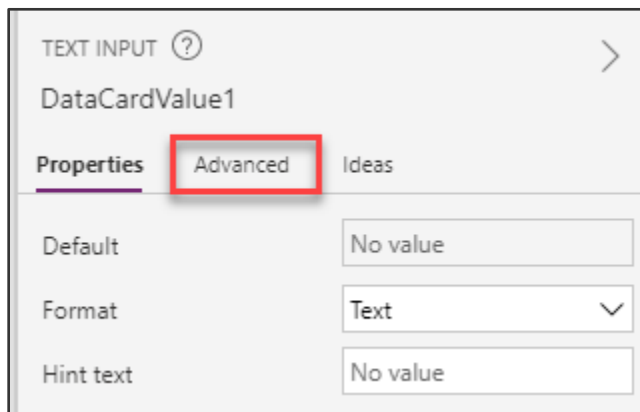
ErrorMessage1: This is a label that is just below the main data entry Field which displays error messages.

DataCardValue1: This is the text input control where you can enter the Title. For this scenario, we will set the title based on the selected machine.

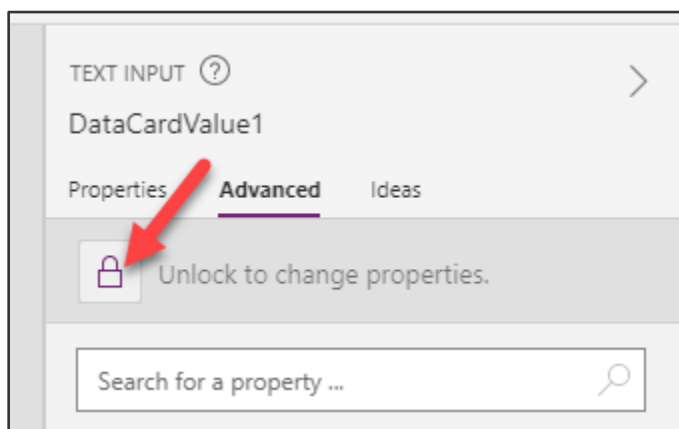
DataCardKey1: This is the label that displays the title of the Field.



2. Select **Machine Name DataCardValue** in the tree view. Then, open the **Advanced** tab in the right-hand pane.



3. Click **Unlock** so you can customize the card.



For the next few steps, we will use the Advanced pane to customize control properties within the form, note that you can perform the same customizations using the property drop-down and formula bar in the top left of the studio.

4. Go to the **Data** section and set the **Default** property to.

```
'Compare List Gallery'.Selected.'Machine Type' & " - " & 'Compare List Gallery'.Selected.'Machine Name'
```

false

DATA

Default

'Compare List
Gallery'.Selected.'Machine Type' & " -
" & 'Compare List
Gallery'.Selected.'Machine Name'

Reset

false

5. Change the **DisplayMode** to **DisplayMode.View**. This will prevent users from changing the value within the text box.

true

DisplayMode

DisplayMode.View

Fewer options ^

Task 4: Configure the price Field

In this task, we are going to set the price to the price of the item and then make it read-only.

1. Expand **Price data card**.

> Main Screen

✓ Compare Screen

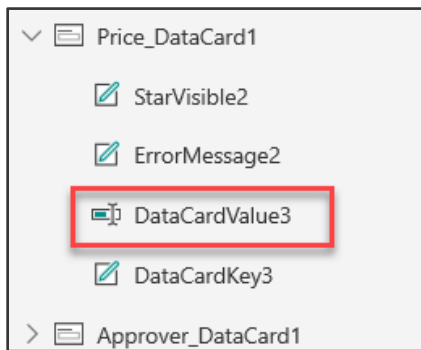
✓ Machine Order Form

> Machine Name_DataCard1

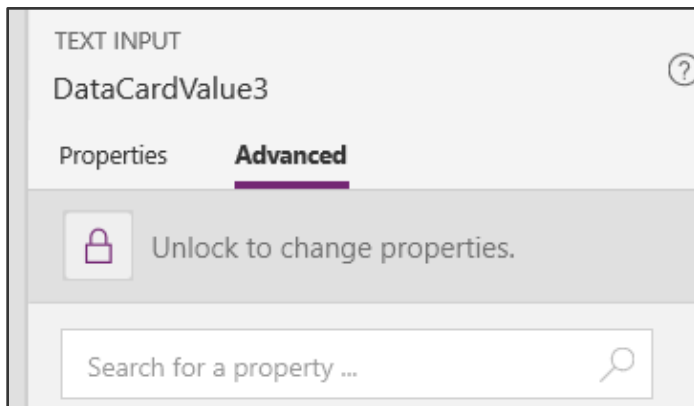
> Price_DataCard1

> Approver_DataCard1

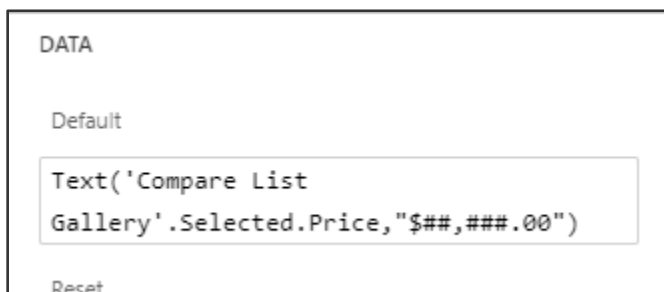
2. Select the **Data Card Value**.



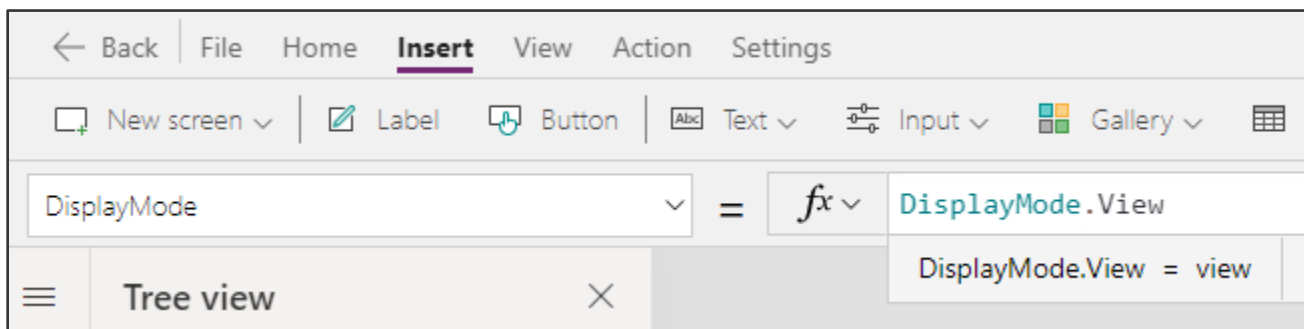
3. Select the **Advanced** tab and click **Unlock**.



4. Change the **Default** property in the Data section to: `Text('Compare List Gallery'.Selected.Price,"###,###.00")`



5. Select the Price Field and change the **DisplayMode** property to `DisplayMode.View`.

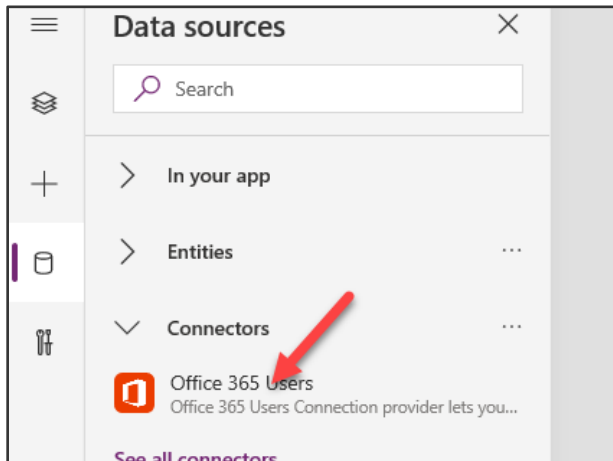


Task 5: Configure the Approval Field

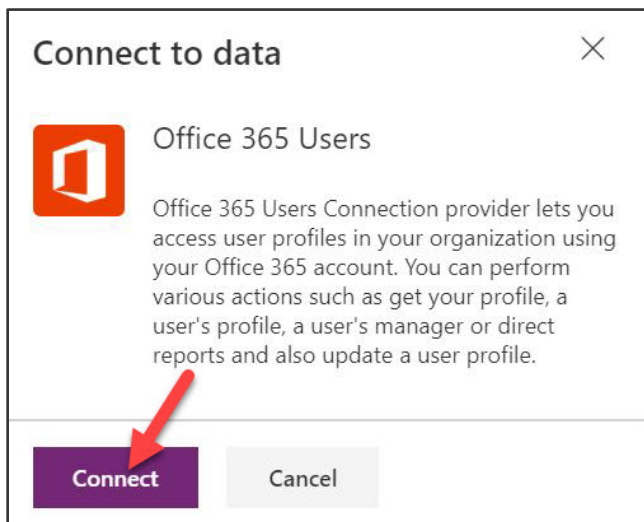
Let's set the **default** value for the Approver to be the email address of the **logged in user's manager**.

You will use the **Office 365 graph** to retrieve the manager's email. You can find more about the Office 365 Users Connection provider here [Office 365 Users Connection Provider](#)

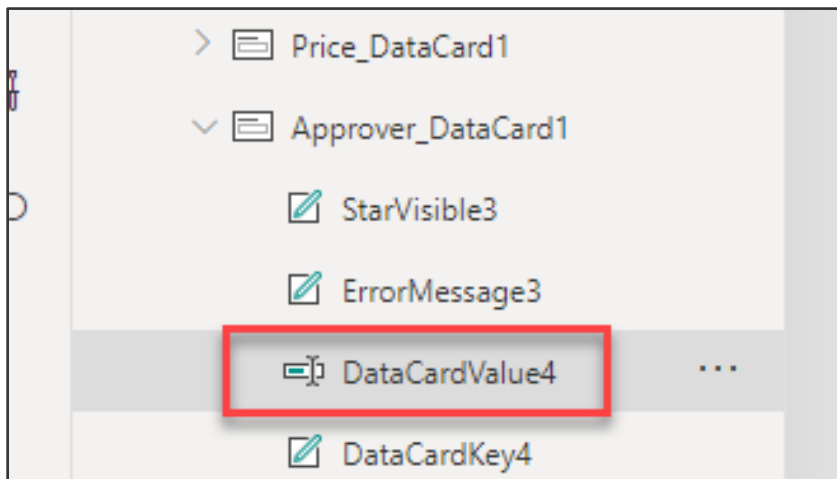
1. Select **Data sources**. Click + **Add data**, then expand Connectors. Select **Office 365 Users**.



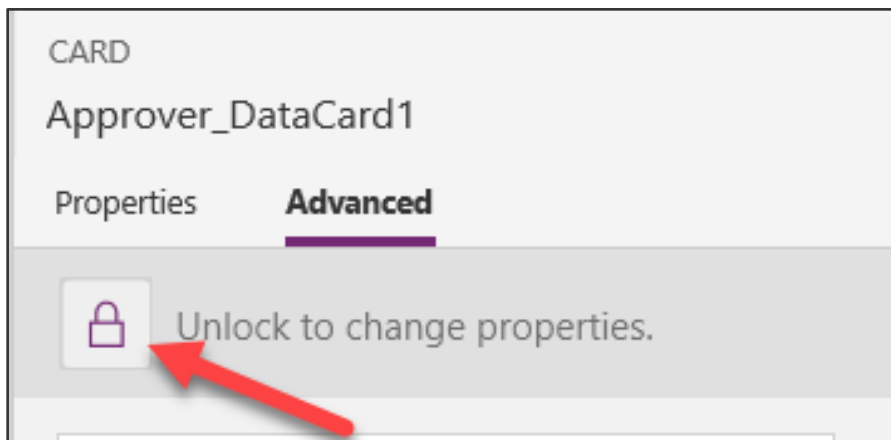
2. When prompted, click **Connect**



3. Select the **Approver Data Card Value** from the Tree view.



4. Go to the **Advanced** pane and **Unlock**.



5. Set the **Default** value to: `User().Email`. This expression will use your user's email, so you won't accidentally e-mail your manager to approve your testing.

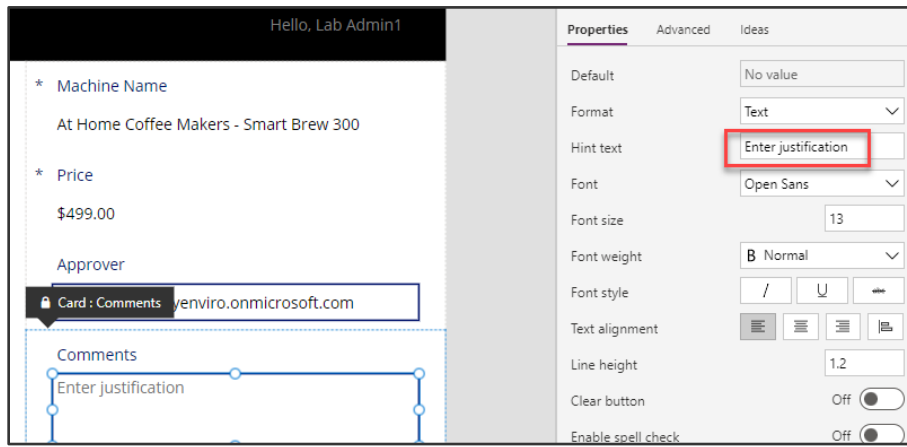
In a real application or if you wanted to try the expression to use your managers email would be `Office365Users.Manager(User().Email).Mail`. This would make an API call at runtime to get the manager's email address of the logged-on user. *If you try this and hit an error when calling the `Office365Users.Manager()` function, this may be because a manager is not set up in the system for the logged in Office 365 user. In that case, you can simply go back go `User().Email`.*

6. Save your work and return to the continue editing the app.

The Office 365 User connector has access to many other valuable types of information you can learn more about the other actions and data available here [Office 365 users Connector](#)

Task 6: Configure the Comment Field

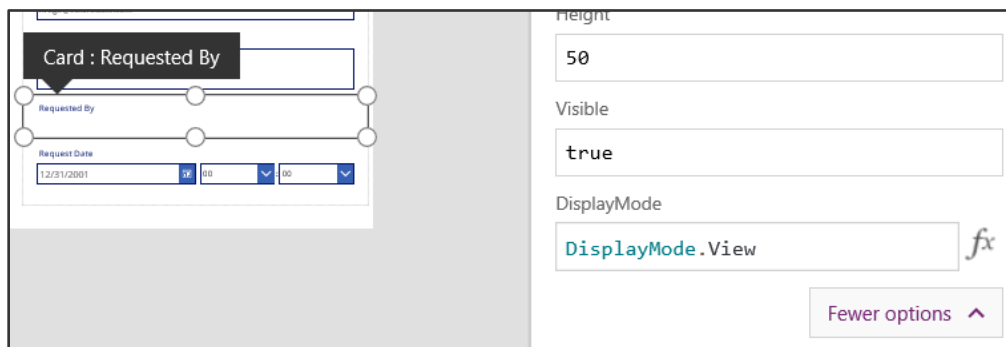
1. Expand the **Comments** Field and select the **DataCardValue**
2. Set its **HintText** property to: "Enter justification."



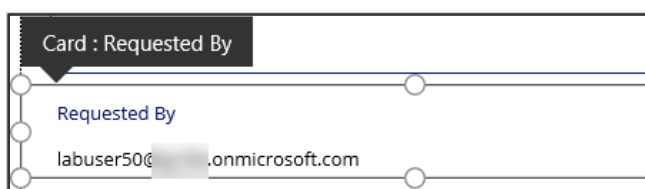
Task 7: Configure the Requested By Field

Let's set the Requested By Field to be the current logged on user's email and disable the control so the user cannot change this value.

1. Expand the **Requested By** card.
2. Select the **DataCardValue**.
3. Go to the **Advanced** pane and **Unlock** the card.
4. Change the **DisplayMode** property to: `DisplayMode.View`



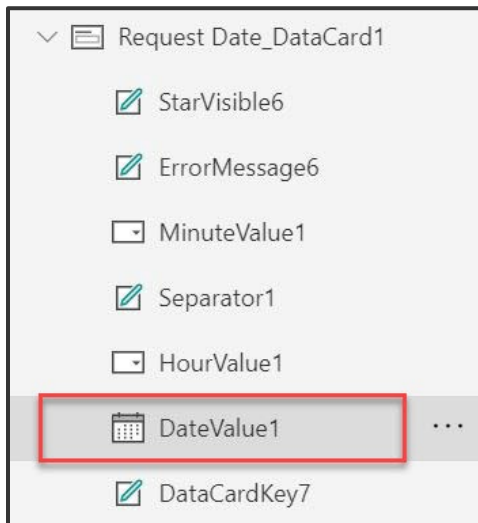
5. Set the **Default** value to `User().Email`
This is the email of the currently logged in user.



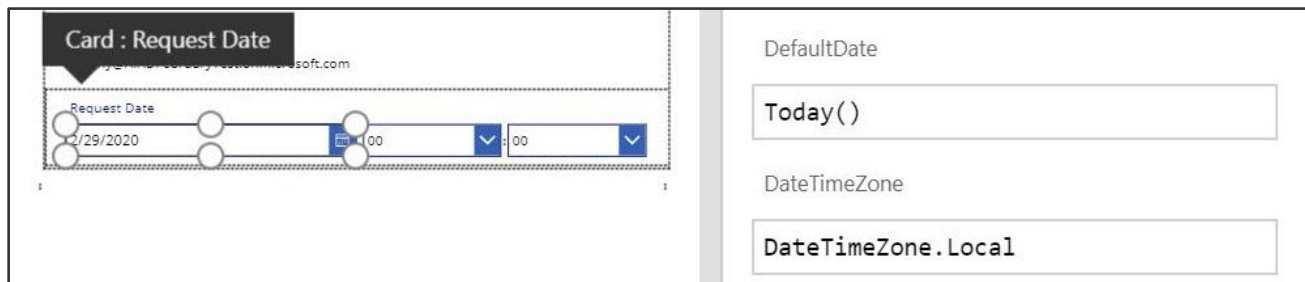
Task 8: Configure the requested date Field

Let's set the Request Date to be today's date.

1. Expand the **Request Date** card.
2. Select the **DateValue** card.



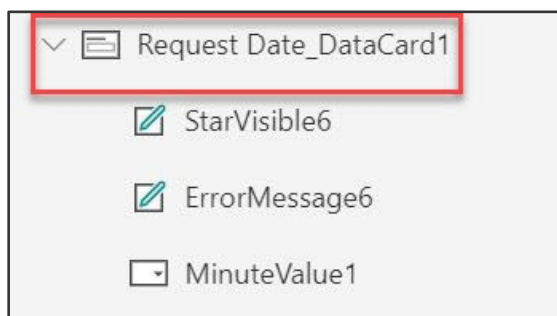
3. Go to the **Advanced** pane and **Unlock** the card.
4. Change the **DefaultDate** property to `Today()`



Notice that the date in the calendar control will change to today's date.

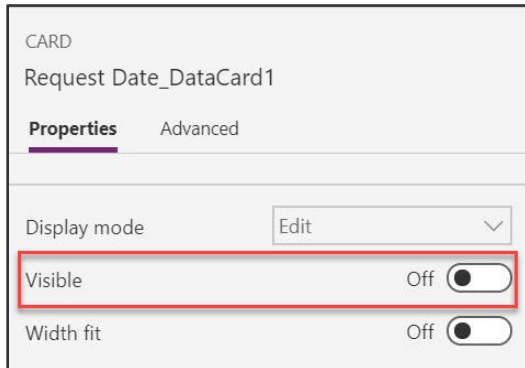
Now we will hide the Request Date card. We don't need to show this Field to the user. Since we have included it as part of the form the Field will get updated as part of the form submit.

5. Select the **Request Date DataCard**



6. Go to the **Properties** pane.

- Set the **Visible** toggle to **Off**.



CARD
Request Date_DataCard1

Properties Advanced

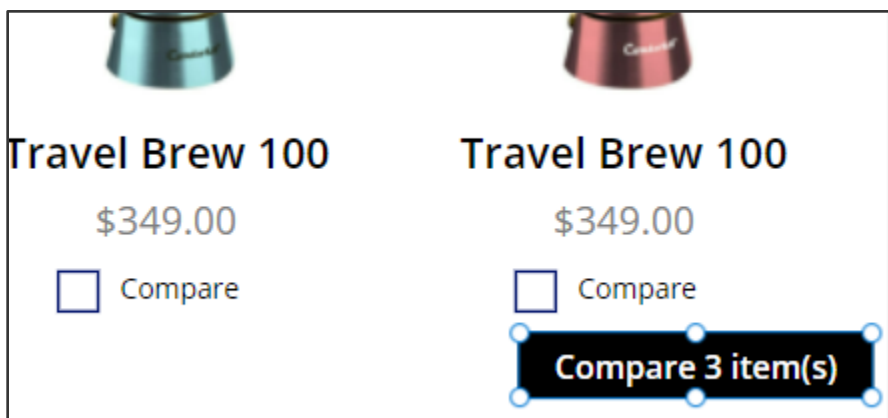
Display mode Edit

Visible Off

Width fit Off

Task 9: Add a button to submit the form

- Select the **Main Screen**.
- Copy (Ctrl-C) the **Compare button** from the first screen which has the correct color values.

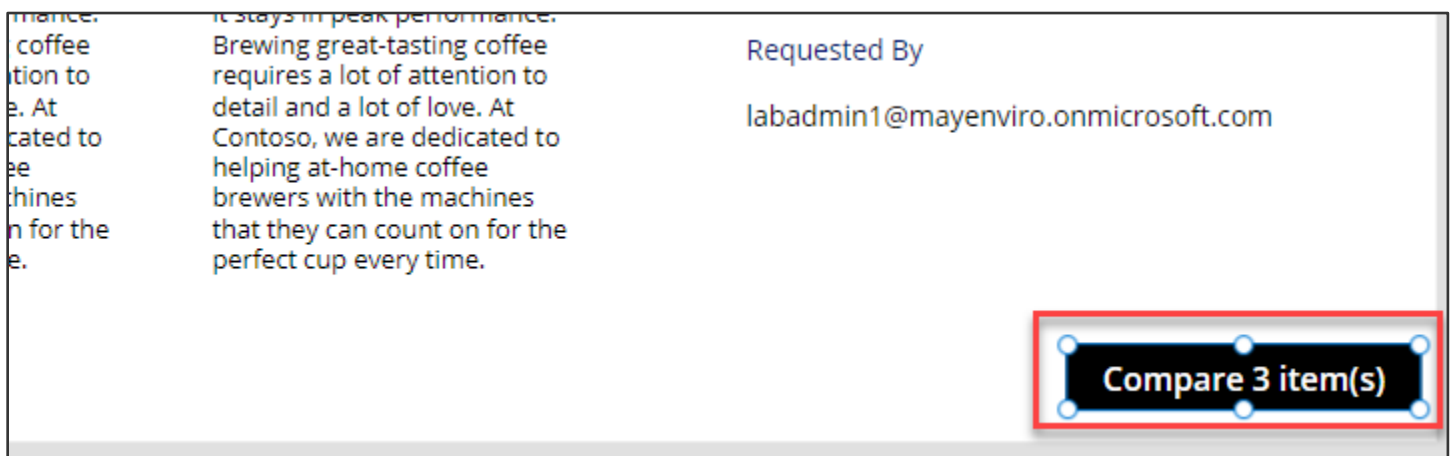


Travel Brew 100 \$349.00 ☐ Compare

Travel Brew 100 \$349.00 ☐ Compare

Compare 3 item(s)

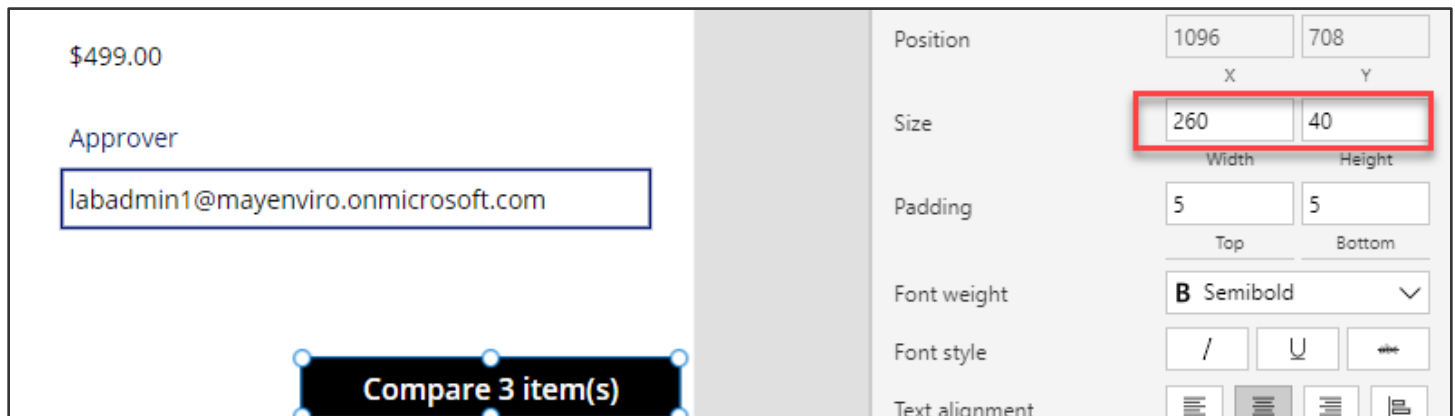
- Go back to the **Compare Screen** and paste (Ctrl-V) the button.



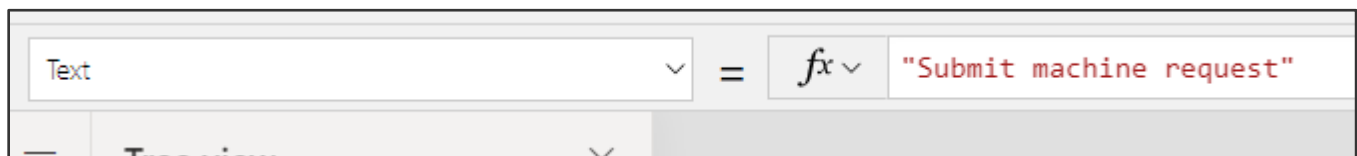
Requested By
labadmin1@mayenviro.onmicrosoft.com

Compare 3 item(s)

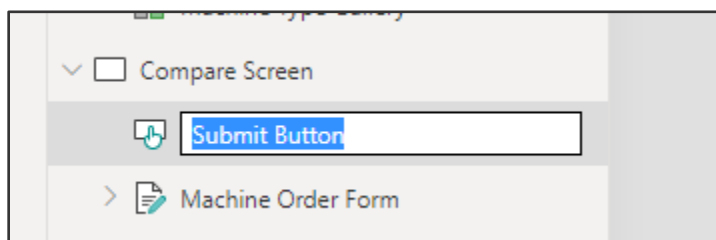
- Make sure the button is larger – you can resize to **260 x 40** using the Properties pane on the right.



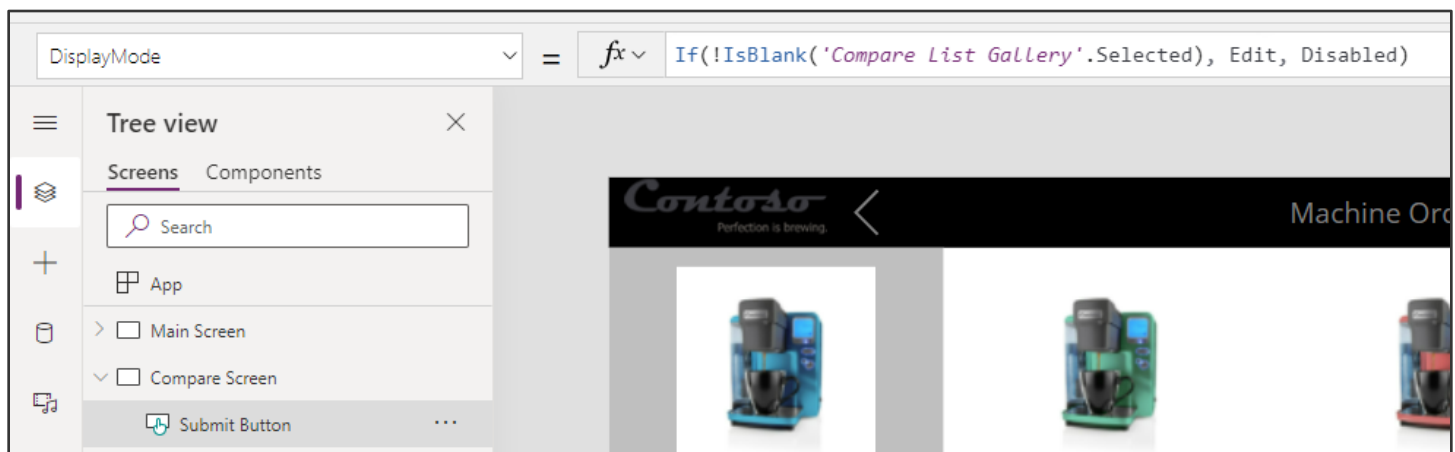
5. Set the button's **Text** property to "Submit machine request".



6. Rename the button to **Submit Button**.

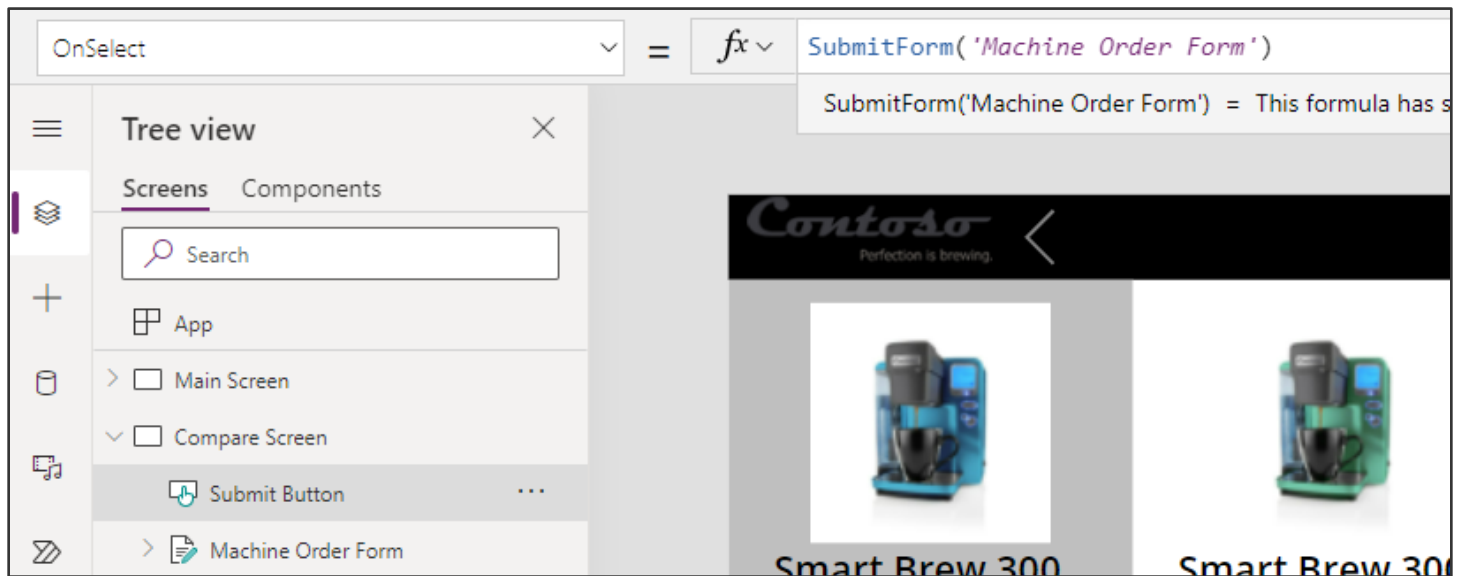


7. The button should be enabled only if a machine is selected. To do this, change the button's **DisplayMode** property to: `If(!IsBlank('Compare List Gallery'.Selected), DisplayMode.Edit, DisplayMode.Disabled)`



Note: You might notice the exclamation mark (!) in the formula `!IsBlank()`. Normally if you just have `IsBlank()` the check is for blank. Adding the exclamation mark (!) in front of it changes it to check if it is NOT blank.

8. Next, we are going to configure what we want to happen when the button is clicked. Set the **OnSelect** property to `SubmitForm('Machine Order Form')`



When the button is pressed, the form data will be submitted to the Microsoft Dataverse.

9. Save your work and return to continue editing the app.





Task 10: Test the form









1. Select the **Main Screen** in the left side tree navigation and click **Play**.



2. Select a few machines to compare. And click **Compare**.




Contoso Perfection is brewing. Machine Ordering Hello, Lab Admin1

 Smart Brew 300 \$499.00 <input checked="" type="checkbox"/> Compare	 Smart Brew 300 \$499.00 <input checked="" type="checkbox"/> Compare	 Smart Brew 300 \$499.00 <input type="checkbox"/> Compare	 Travel Brew 100 \$349.00 <input type="checkbox"/> Compare
 Smart Brew 300 \$499.00 <input type="checkbox"/> Compare	 Smart Brew 300 \$499.00 <input checked="" type="checkbox"/> Compare	 Travel Brew 100 \$349.00 <input type="checkbox"/> Compare	 Travel Brew 100 \$349.00 <input type="checkbox"/> Compare

3. Select one of the machines.

Contoso Perfection is brewing. Machine Ordering Hello, Lab Admin1

Smart Brew 300
\$499.00
Auto-Brew 50-100 1-100
The Smart Brew 300 offers both espresso and coffee brewing in one device, with inherent intelligence that self-monitors to ensure that it stays in peak performance. Brewing great-tasting coffee requires a lot of attention to detail and a lot of love. At Contoso, we are dedicated to helping at-home coffee brewers with the machines that they can count on for the perfect cup every time.

Smart Brew 300
\$499.00
Auto-Brew 50-100 1-100
The Smart Brew 300 offers both espresso and coffee brewing in one device, with inherent intelligence that self-monitors to ensure that it stays in peak performance. Brewing great-tasting coffee requires a lot of attention to detail and a lot of love. At Contoso, we are dedicated to helping at-home coffee brewers with the machines that they can count on for the perfect cup every time.

Smart Brew 300
\$499.00
Auto-Brew 50-100 1-100
The Smart Brew 300 offers both espresso and coffee brewing in one device, with inherent intelligence that self-monitors to ensure that it stays in peak performance. Brewing great-tasting coffee requires a lot of attention to detail and a lot of love. At Contoso, we are dedicated to helping at-home coffee brewers with the machines that they can count on for the perfect cup every time.

* Machine Name
At Home Coffee Makers - Smart Brew 300

* Price
\$499.00

Approver
labadmin1@mayenviro.onmicrosoft.com

Comments
Enter justification

Requested By
labadmin1@mayenviro.onmicrosoft.com

Notice that the Title, Price, Approver, and Requested By Fields are already filled in.

4. Add some **Comments**, such as: "This machine will satisfy our needs."
5. Click **Submit machine request**.

Contoso Perfection is brewing

Machine Ordering

Hello, Lab Admin4

Smart Brew 300

\$499.00

Auto-Brew

50-100

1-100

The Smart Brew 300 offers both espresso and coffee brewing in one device, with inherent intelligence that self-monitors to ensure that it stays in peak performance. Brewing great-tasting coffee requires a lot of attention to detail and a lot of love. At Contoso, we are dedicated to helping at-home coffee brewers with the machines that they can count on for the perfect cup every time.

Smart Brew 300

\$499.00

Auto-Brew

50-100

1-100

The Smart Brew 300 offers both espresso and coffee brewing in one device, with inherent intelligence that self-monitors to ensure that it stays in peak performance. Brewing great-tasting coffee requires a lot of attention to detail and a lot of love. At Contoso, we are dedicated to helping at-home coffee brewers with the machines that they can count on for the perfect cup every time.

Smart Brew 300

\$499.00

Auto-Brew

50-100

1-100

The Smart Brew 300 offers both espresso and coffee brewing in one device, with inherent intelligence that self-monitors to ensure that it stays in peak performance. Brewing great-tasting coffee requires a lot of attention to detail and a lot of love. At Contoso, we are dedicated to helping at-home coffee brewers with the machines that they can count on for the perfect cup every time.

* Machine Name

At Home Coffee Makers - Smart Brew 300

* Price

\$499.00

Approver

labadmin4@julyenviro.onmicrosoft.com

Comments

This machine will satisfy our needs.

Requested By

labadmin4@julyenviro.onmicrosoft.com

Submit machine request

The button should turn disabled (gray) for a few seconds while it's submitting the request. If it does not do this there is likely an error. Click the X in top right to get back to the design mode.

If there is an error, you will see a yellow error icon next to the Submit button, hover over it to check the error.

- Exit the preview mode ('X' in top right).
- Save the Application and Publish.

Publish

This version of your app will be published in the environment Dev - labadmin1.
[Learn more about publishing](#)

App icon and name

Machine Ordering App

Description

no description

Publish this version **Edit details**

Task 11: Verify a new item was added to the Machine Order table

- Open a browser window, go to [Make Power Apps](#).
- Click on **Dataverse** -> **Tables**.

3. Select the **Machine Order** table.

<ul style="list-style-type: none"> Home Learn Apps Create Dataverse Tables Choices Dataflows Azure Synapse Link Connections Custom Connectors Gateways Flows 	Tables <table> <tr> <th>Table ↑</th><th>Name ↓</th></tr> <tr><td>Account</td><td>account</td></tr> <tr><td>Address</td><td>customeraddress</td></tr> <tr><td>Appointment</td><td>appointment</td></tr> <tr><td>Attachment</td><td>activitymimeattachment</td></tr> <tr><td>Business Unit</td><td>businessunit</td></tr> <tr><td>Contact</td><td>contact</td></tr> <tr><td>Currency</td><td>transactioncurrency</td></tr> <tr><td>Email</td><td>email</td></tr> <tr><td>Email Template</td><td>template</td></tr> <tr><td>Fax</td><td>fax</td></tr> <tr><td>Feedback</td><td>feedback</td></tr> <tr><td>Letter</td><td>letter</td></tr> <tr><td>Machine Order</td><td>contoso_machineorder</td></tr> </table>	Table ↑	Name ↓	Account	account	Address	customeraddress	Appointment	appointment	Attachment	activitymimeattachment	Business Unit	businessunit	Contact	contact	Currency	transactioncurrency	Email	email	Email Template	template	Fax	fax	Feedback	feedback	Letter	letter	Machine Order	contoso_machineorder
Table ↑	Name ↓																												
Account	account																												
Address	customeraddress																												
Appointment	appointment																												
Attachment	activitymimeattachment																												
Business Unit	businessunit																												
Contact	contact																												
Currency	transactioncurrency																												
Email	email																												
Email Template	template																												
Fax	fax																												
Feedback	feedback																												
Letter	letter																												
Machine Order	contoso_machineorder																												

4. You should see a newly added row with your machine order details. This may take a few seconds to load.

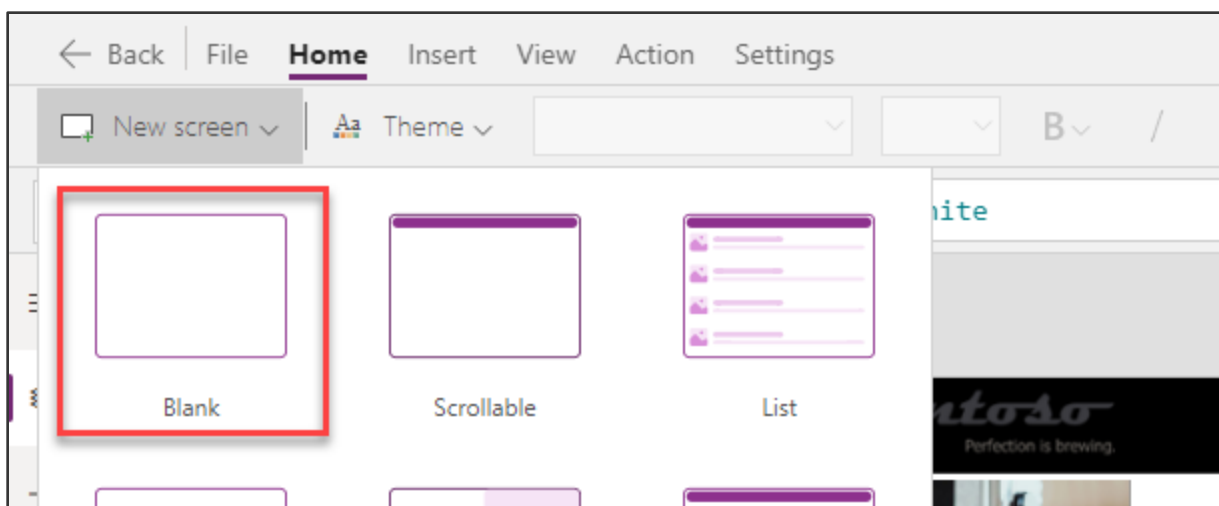
Machine Order columns and data						
	Estimated Shi...	Machine Name *	Price *	Created On	Approval Status	
		At Home Coffee Makers - Smart B...	499	5/16/2022 2:06 PM		A

Task 12: [Optional] Navigate to confirmation screen after the Form submit is successful

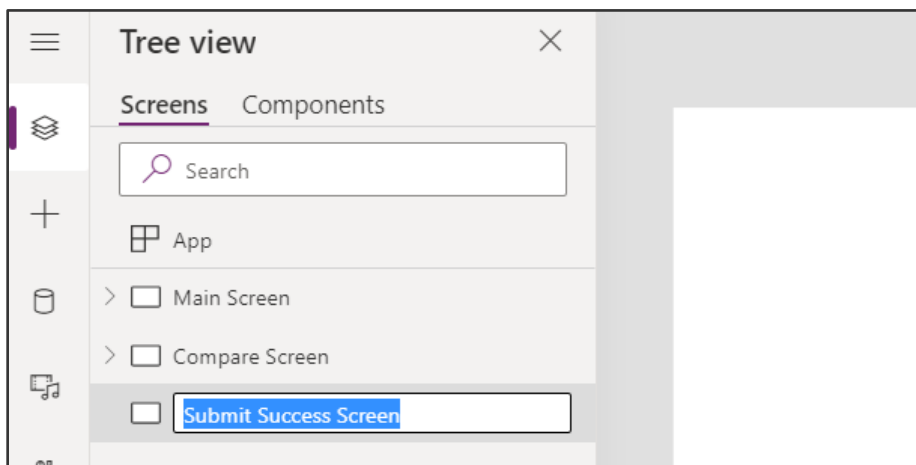
This step is optional, if you're short on time you may skip it and continue to the next module.

Once the Form has been successfully submitted, it's a good idea to show a confirmation screen and allow the user to navigate back to the main screen.

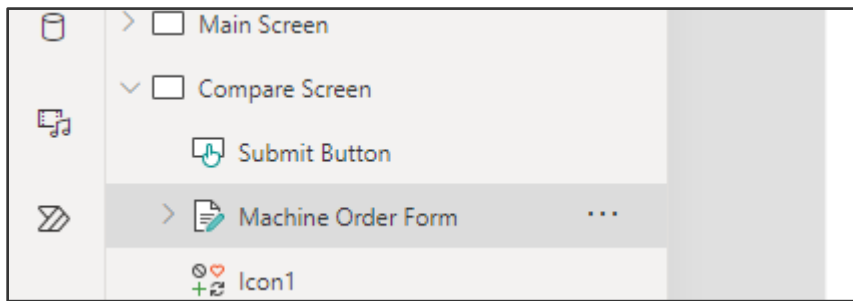
1. Open a browser window, go to [Make Power Apps](#).
2. Select **Apps**, select the **Machine Ordering App**, and click **Edit**.
3. Select **Home** -> **New screen** -> **Blank**.



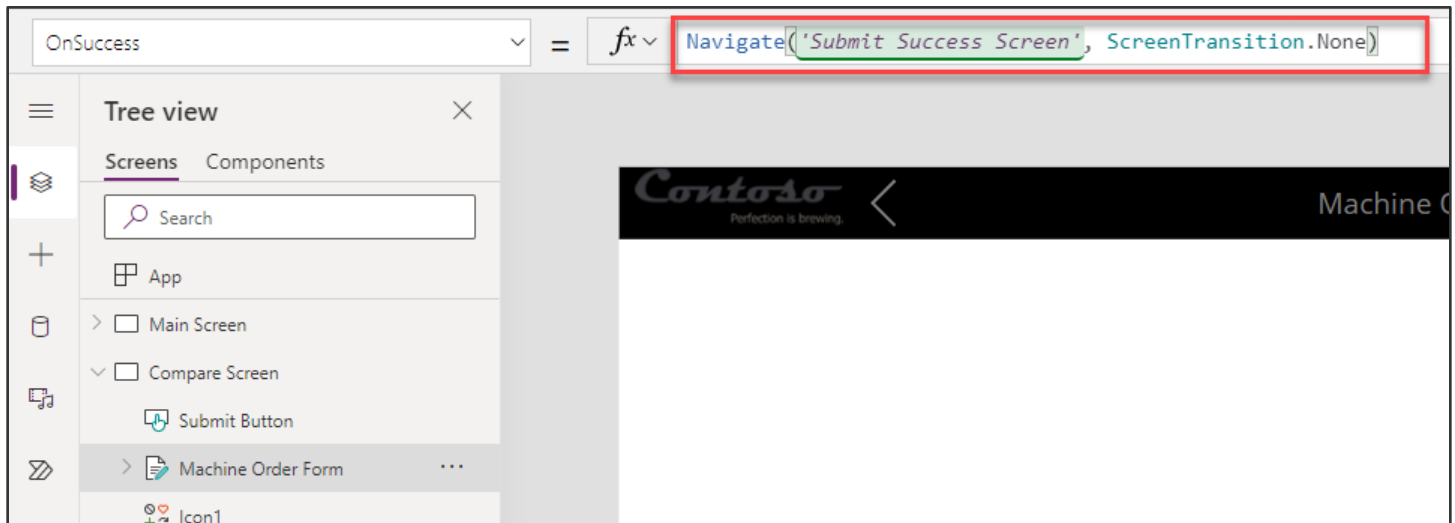
4. Rename the screen to **Submit Success Screen**.



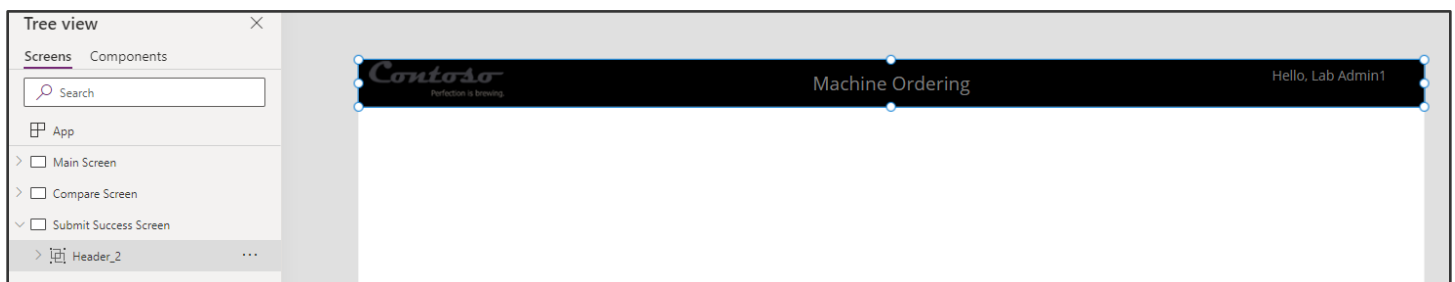
5. Expand the **Compare Screen**.
6. Select the Form – you can use the tree view on the left to select **Machine Order Form**.



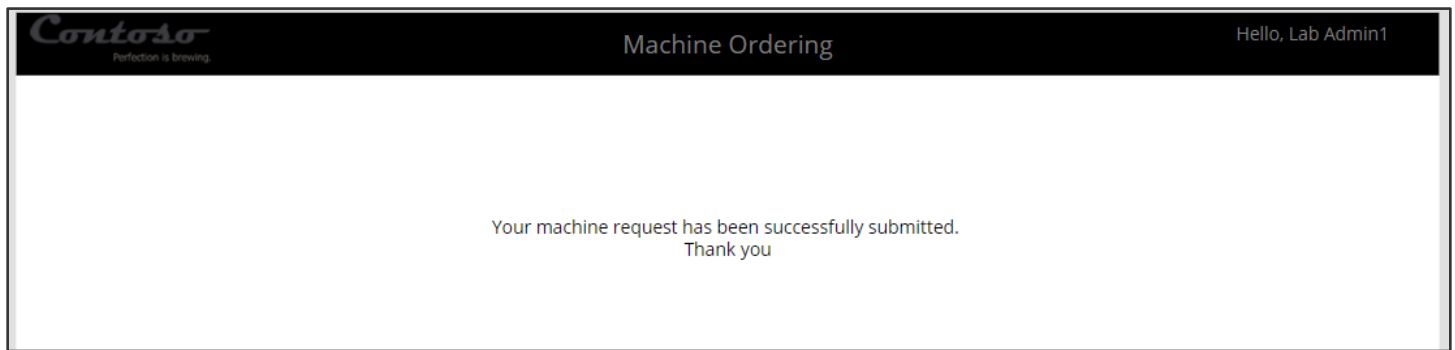
7. Set the **OnSuccess** property to: `Navigate('Submit Success Screen', ScreenTransition.None)`



8. Copy (Ctrl-C) the **Header** from the Compare Screen.
 9. Go to the **Submit Success Screen** and paste the header.

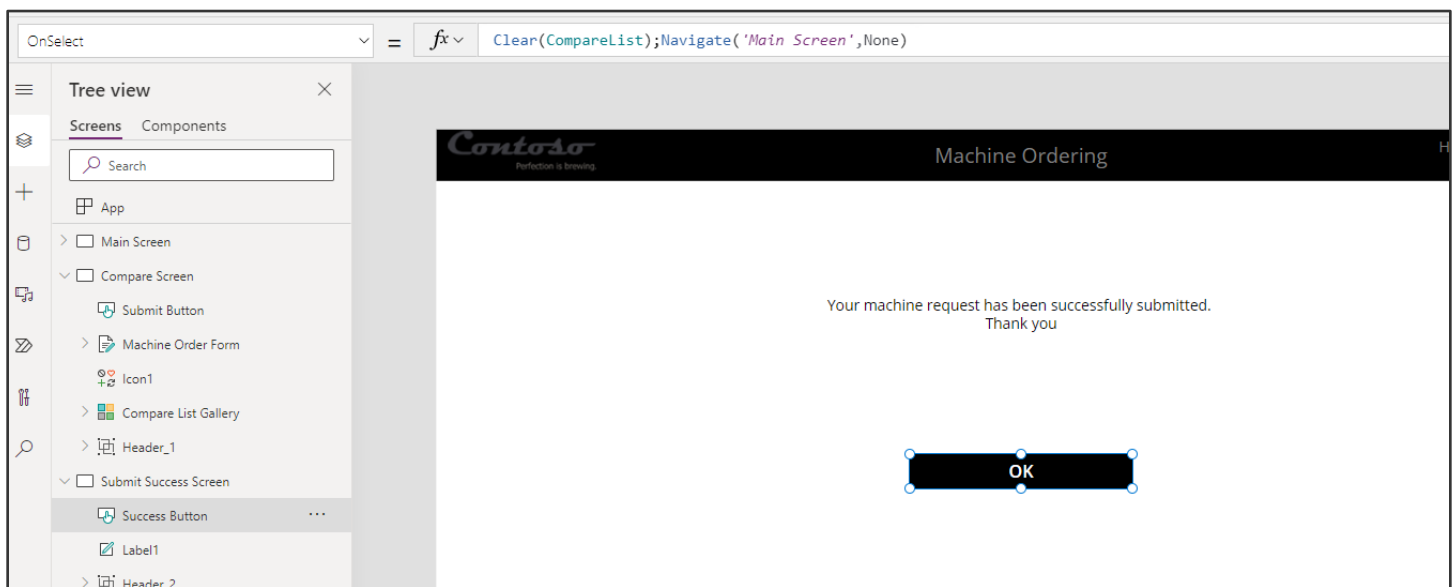


10. **Insert** another **label** in the middle of the screen and set the **Text** to: **"Your machine request has been successfully submitted. Thank you."**
 11. Increase the font size, the size of the label and center the text.



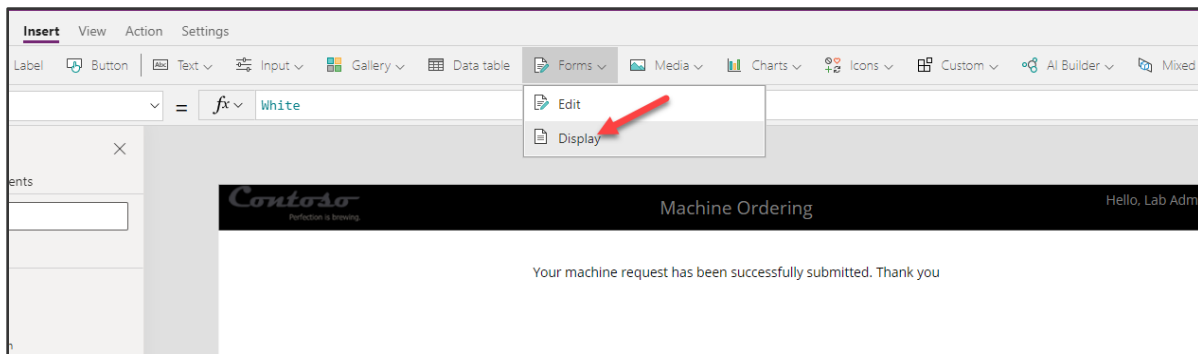
12. Copy the **Submit Button** from the Compare Screen and paste it in the **Submit Success Screen**.
13. Rename the button **Success Button**.
14. Change the **Text** of the Success Button to **OK**.
15. Change the Display Mode of the Success Button to `DisplayMode.Edit`.
16. Move the Button to middle of the screen.
17. When pressed, the button should remove items from the CompareList collection and navigate to the main screen.
18. Set the **OnSelect** property of the button to:

```
Clear(CompareList);Navigate('Main Screen',ScreenTransition.None)
```

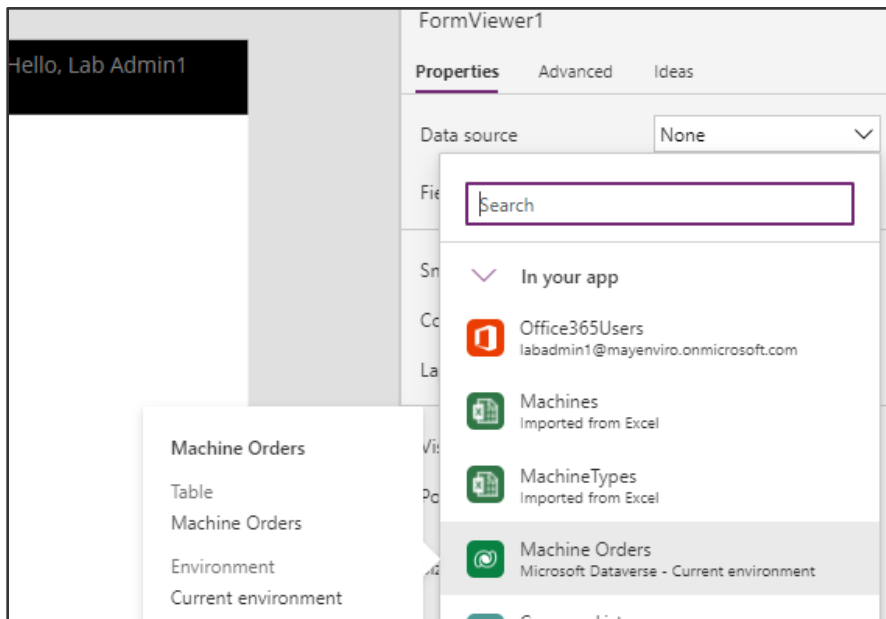


Note: ';' is used as a separator when multiple functions are called one after the other. If you are in a locale where ',' is used as a comma-separator, then use a double ';' here (without the single-quotes).

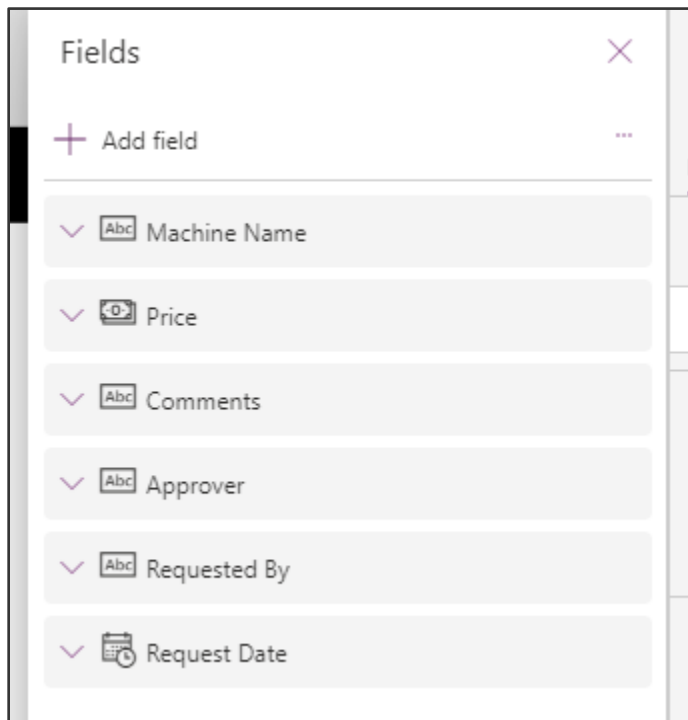
19. Move the label up and add a Display Form: **Insert** -> **Form** -> **Display**.



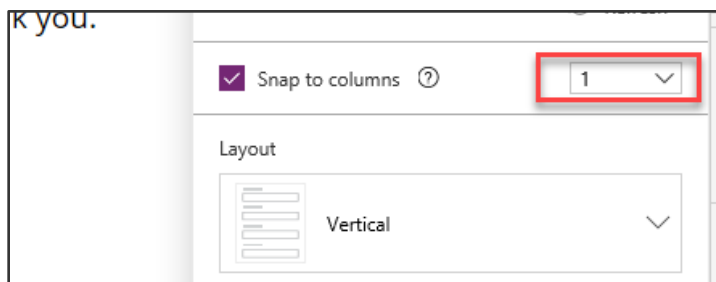
20. Configure its **data source** to point to the '**Machine Orders**' table.



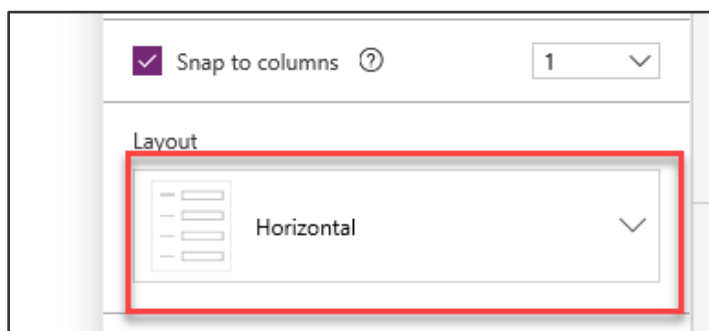
21. Select the Fields to display: Machine Name, Price, Comments, Approver, Requested By, Request Date. Rearrange and remove any additional Fields.



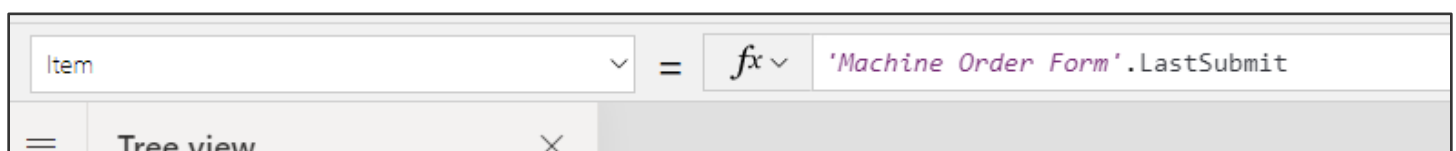
22. Change the **Snap to column** value from 3 to 1.



23. Change the **Layout** from Vertical to **Horizontal**.



24. Set form **Item** property to 'Machine Order Form'.LastSubmit



25. Reposition/Resize the form until it looks like the image below. The Label will be first on the screen, centered under the header. Then, position the view form to be centered under the label. Finally, the "OK" button will should be centered at the bottom of the page under the view form.

Machine Ordering

Your machine request has been successfully submitted. Thank you

Machine Name

Price

Comments

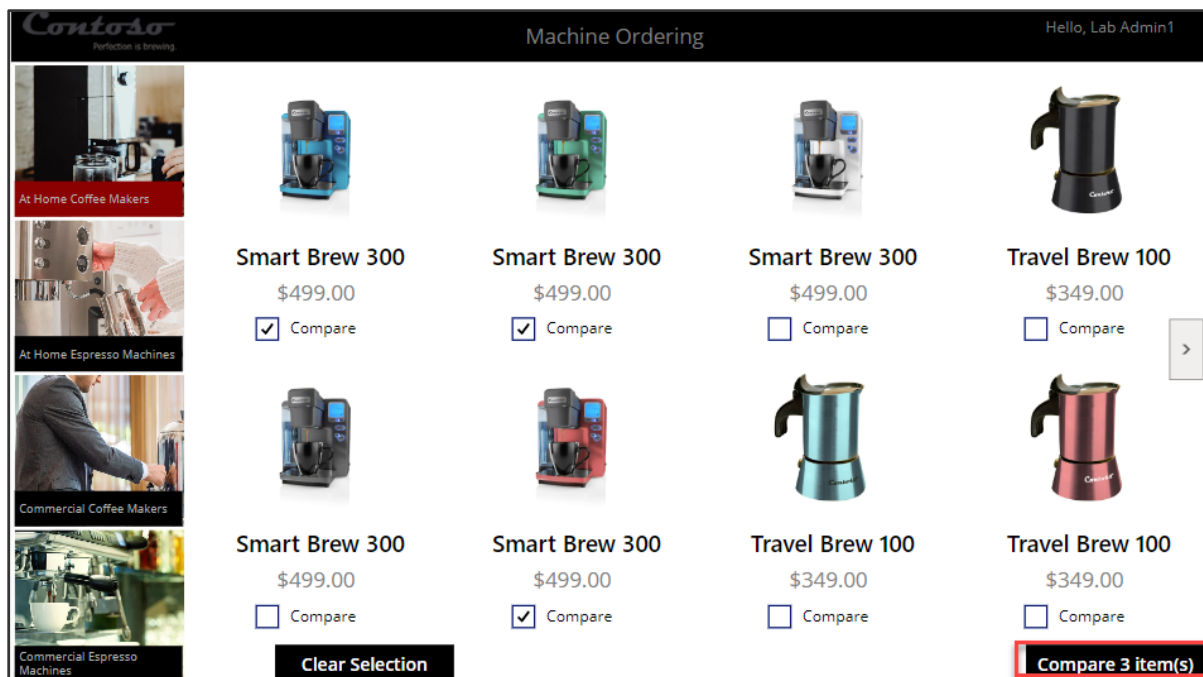
Approver

Requested By

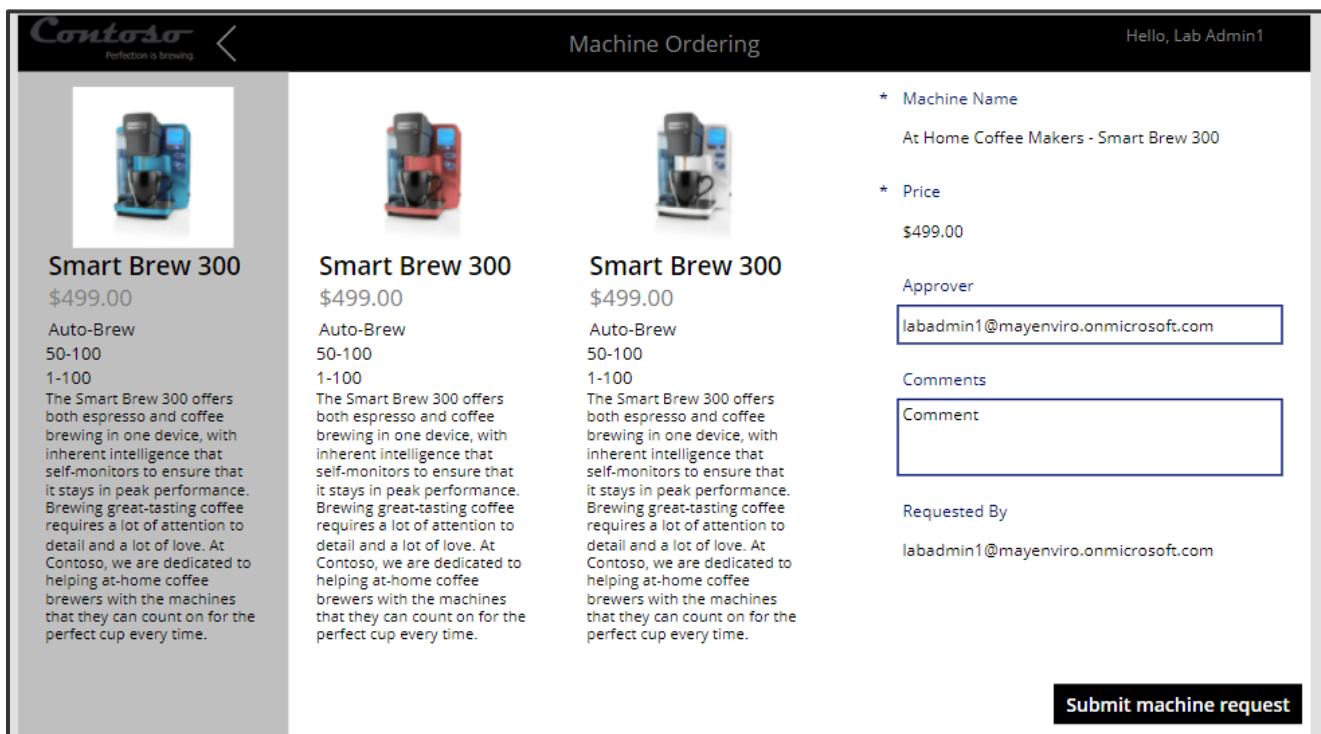
Request Date

OK

26. Save your changes and **Publish**.
27. Select the **Main Screen** and click **Play**.
28. Select few machines and click Compare



29. Select one of the machines, provide a comment and click **Submit**.



30. Verify that the confirmation screen shows the order details. Click **OK**.

Contoso
Perfection is brewing

Machine Ordering

Hello, Lab Admin1

×

Your machine request has been successfully submitted. Thank you.

Machine Name	At Home Coffee Makers - Smart Brew 300
Price	499
Comments	Comment
Approver	labadmin1@julyenviro.onmicrosoft.com
Requested By	labadmin1@julyenviro.onmicrosoft.com
Request Date	7/7/2022 12:00 AM

OK


31. The application will navigate back to the main screen and the compare list will be cleared.


Contoso
Perfection is brewing


Machine Ordering


Hello, Lab Admin1


×


At Home Coffee Makers



Smart Brew 300
\$499.00
☐ Compare



Smart Brew 300
\$499.00
☐ Compare



Smart Brew 300
\$499.00
☐ Compare



Travel Brew 100
\$349.00
☐ Compare


>


At Home Espresso Machines


Smart Brew 300
\$499.00
☐ Compare


Smart Brew 300
\$499.00
☐ Compare


Travel Brew 100
\$349.00
☐ Compare


Travel Brew 100
\$349.00
☐ Compare

Clear Selection

Compare 0 item(s)

32. Close the application.

References

App in a Day introduces some of the key functionalities available in Power Apps, Power Automate, Power BI and the Microsoft Dataverse. For an up to date list of learning references, see [Power Apps Resources](#) and [Power Automate Resources](#).

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