

Using the Power Platform to Extend Finance and Operations Apps

Part 1: Use Cases and Recommended Practices

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Objectives

- Describe use cases for Power Automate with Finance and Operations apps.
- Describe use cases for Power Apps with Finance and Operations apps.
- Describe use cases for Power Virtual Agents with Finance and Operations apps.
- Describe use cases for leveraging the Common Data Model and Common Data Service with Finance and Operations apps.
- Review DO's and DON'Ts for Application Lifecycle Management of Power Platform Components with your Finance and Operations

Common Data Service

Dual Write

Tightly coupled, bi-directional, near real-time integration

Virtual Entities

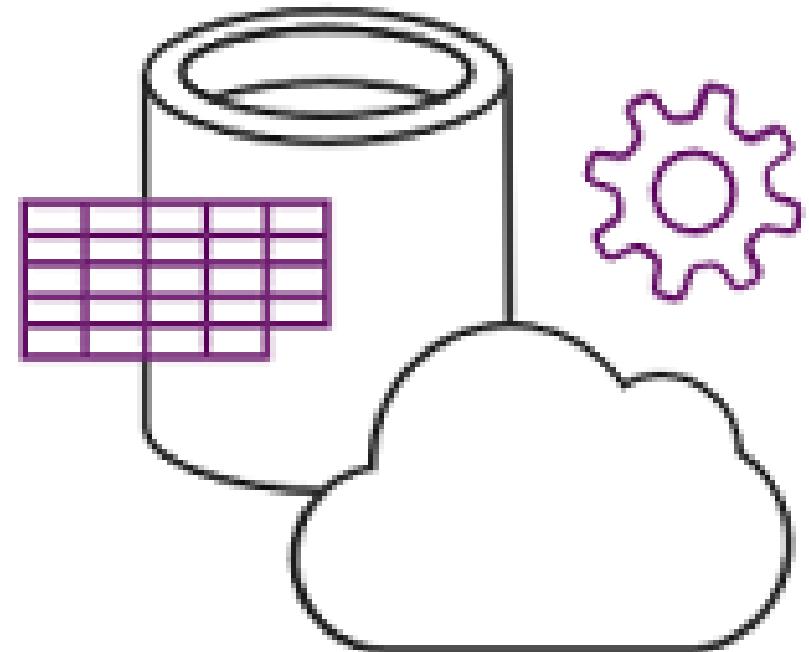
Your F&O data in the Common Data Service

Data Integrator

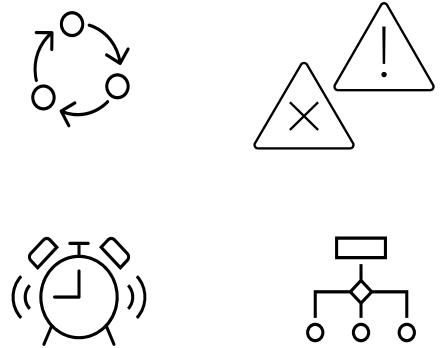
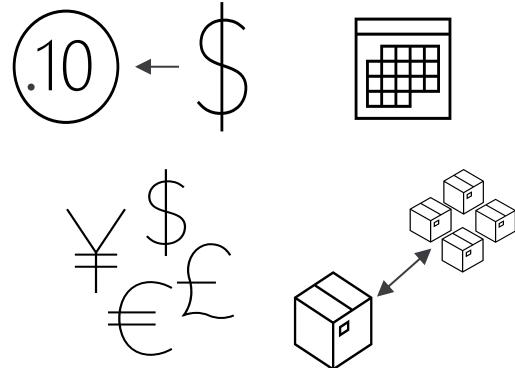
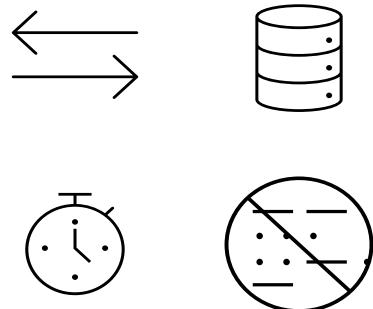
Point-to-point asynchronous integration

Industry Accelerators

Industry specific components to help you build vertical solutions quickly



Dual Write



Overview

- Tightly coupled, near real-time, bidirectional integration
- Common data automatically flows to CDS
- No-code/Low-code principle
- Online and offline mode

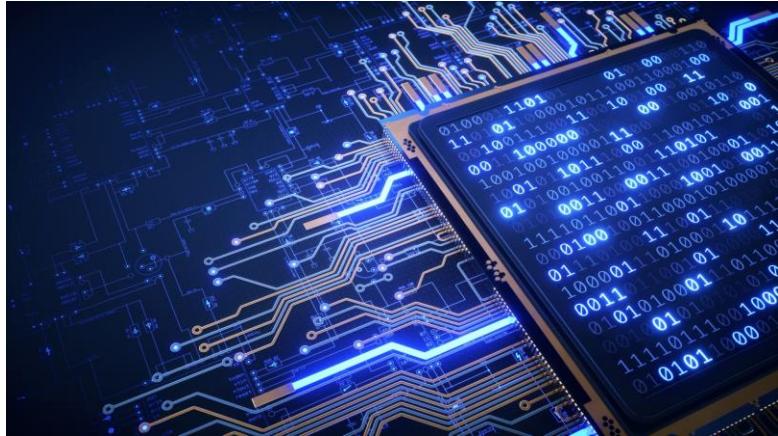
CDS Changes

- Decimal data type to replace money data type
- Date effectivity
- More currency and exchange rate support
- Unit conversions

Managing Dual Write

- Customize entity and field mappings
- Error management
- Alert settings
- Change legal entities for mapping

Virtual Entities



Benefits

- No copying of data
- No code/low-code extensions
- Create Power Apps
- Create Power Automate Flows
- Create Power Virtual Agents

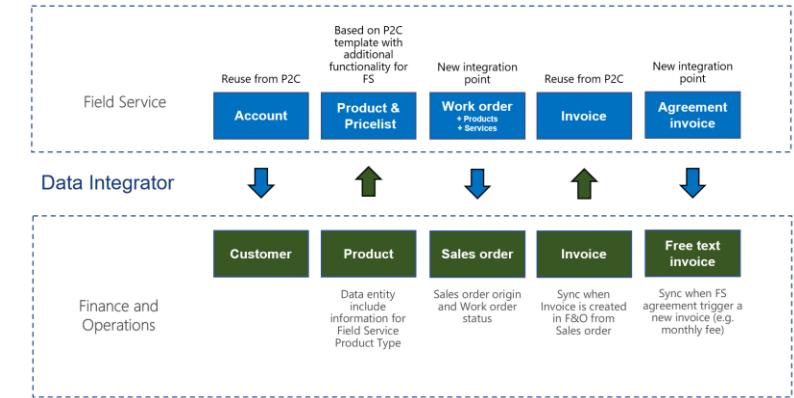
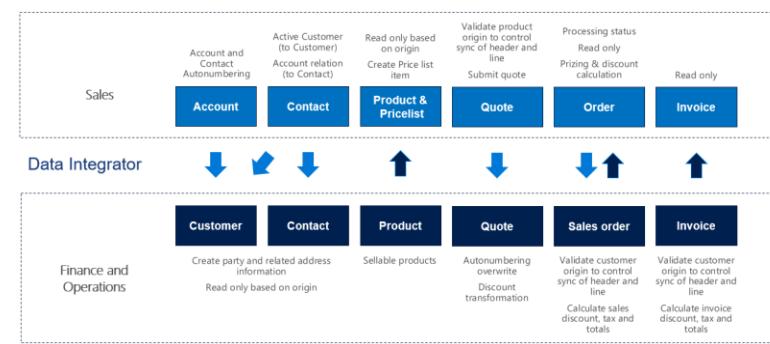
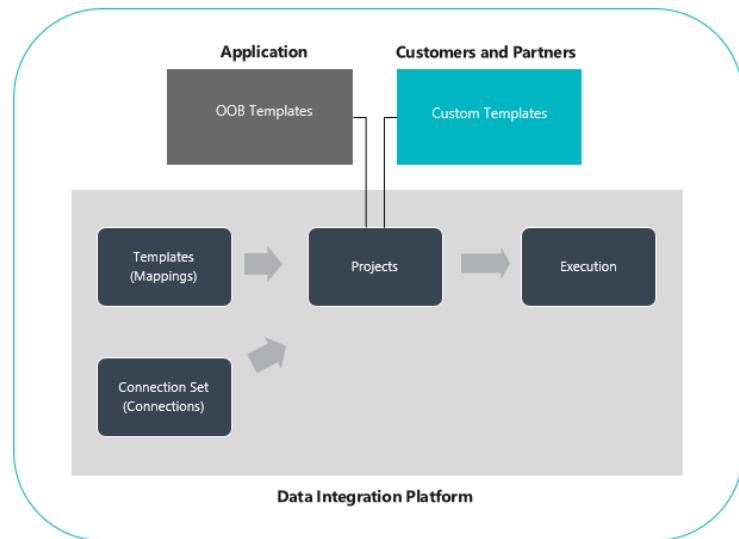
Examples for CE Users

- View credit information such as credit limits, collection letters, and so on.
- View product or inventory information.
- View asset maintenance information or fixed asset details.

Examples for F&O Users

- Create a Power App to make data entry more simplified
- Create app experiences with bar code scanning and picture taking on a device
- Trigger Power Automate flows for emails or automation

Data Integrator Use Cases



Data Integrator Platform

- Templates
- Projects
- Connection Set
- Mappings

Prospect to Cash Integration

- Sales CE-> F&O
- Products F&O -> CE
- Contacts CE -> F&O
- Sales Quotes CE -> F&O
- Orders CE -> F&O
- Invoices F&O -> CE

Field Service Integration

- Accounts CE-> F&O
- Products F&O -> CE
- Work Orders CE -> F&O
- Invoices F&O -> CE
- Agreement Invoice CE-> F&O

Industry Accelerator Use Cases



Automotive

- Entities like deals, fleet, warranties, and test drives
- Includes data model, Power BI, Canvas app, and Model-Driven app samples



Banking

- Entities like banks, branches, loans, and financial products
- Includes data model, sample apps, and dashboards



Insurance

- Entities like property, casualty, and life insurance
- For both producer and agency management
- Includes data model, sample apps, and dashboards
- Integrates with D365 Sales

Industry Accelerator Use Cases



Healthcare

- Entities like patient, practitioner, and related person
- Includes data model, sample apps, and dashboards

Higher Education

- Entities like students, internships, scholarships, grants, and accomplishments
- Includes data model, student portal, sample apps, and dashboards

K-12

- Entities like students, educator, donors, behavior management, attendance
- Includes data model, parent and student portal, sample apps, and dashboards

Industry Accelerator Use Cases



Nonprofit

- Entities like constituent management, fundraising, awards, program delivery, and impact tracking
- Includes data model, 8 model-driven apps, dashboards, data integrator templates



Manufacturing

- Entities like supplier onboarding, API onboarding, supplier management console
- Includes data model, sample portal, sample apps, and dashboards

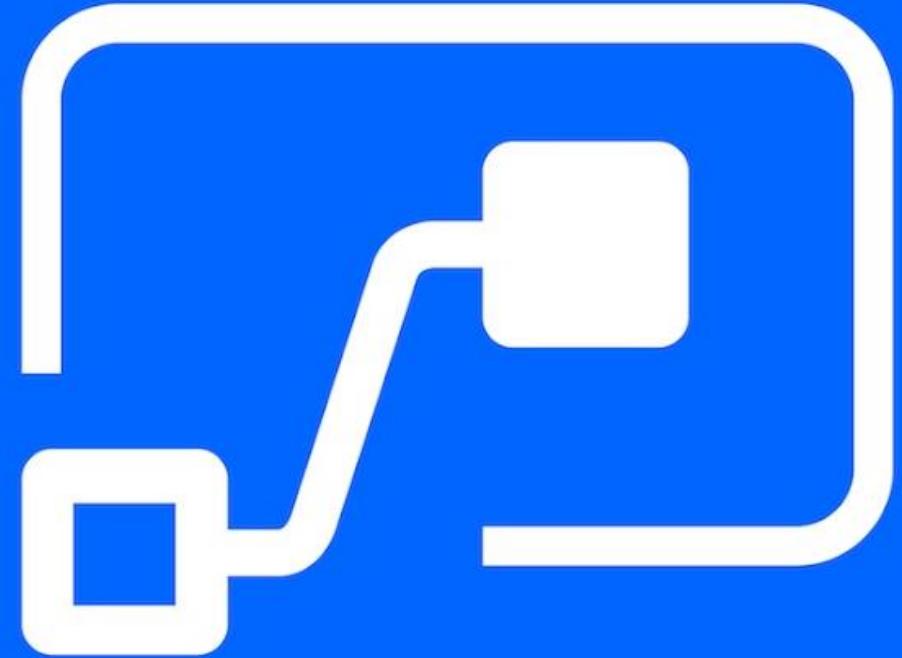


Media and Communications

- Entities like event and venues, sports management, ticketing, advertising, sponsorships, guest interactions, and loyalty programs
- Includes data model, 5 model-driven sample apps, sample portal, and dashboards

Power Automate

Low-Code/No-Code solution to help you build workflows between your favorite applications



Power Automate Use Case: Workflow

Purchase requisition submitted

Approval to multiple people

Send email and add to Teams site

Update Purchase requisition as Approved

Purchase Requisition Workflow

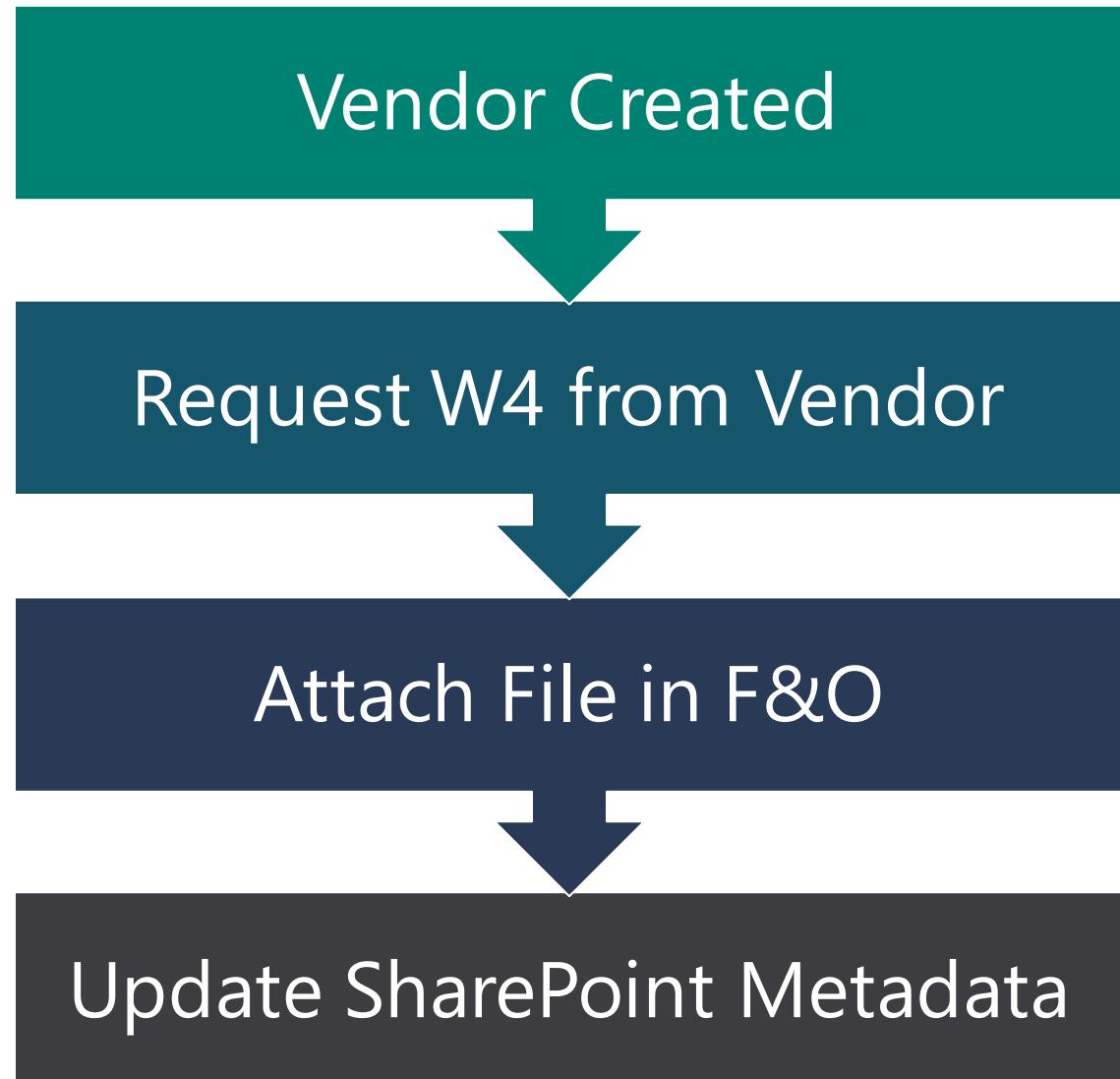
When to use:

- You want the approvers to be able to approve directly from their email.
- Additional actions are needed when it is approved.

Considerations:

- All workflows are supported
- Must validate the work items – Execute Action: Validate
- Must complete the work items – Execute Action: Complete

Power Automate Use Case: Alert Rules



When a Vendor is Created Alert Rule

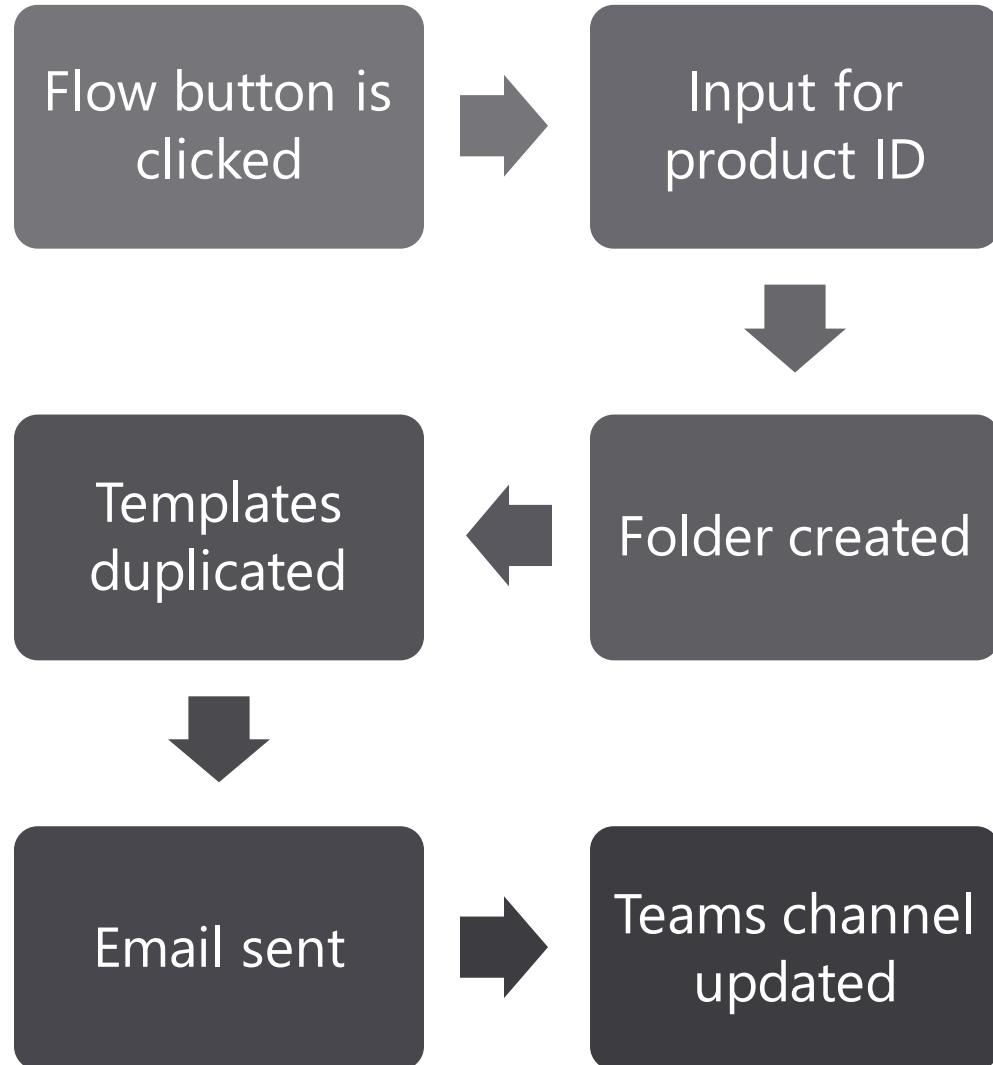
When to use:

- Interaction from non system users required.
- Update other systems.
- Notifying people with richly formatted emails.

Considerations:

- Only one flow can trigger alert rules – use a switch statement

Power Automate Use Case: Instant (Button) Flow



New Product is Launched Button Flow

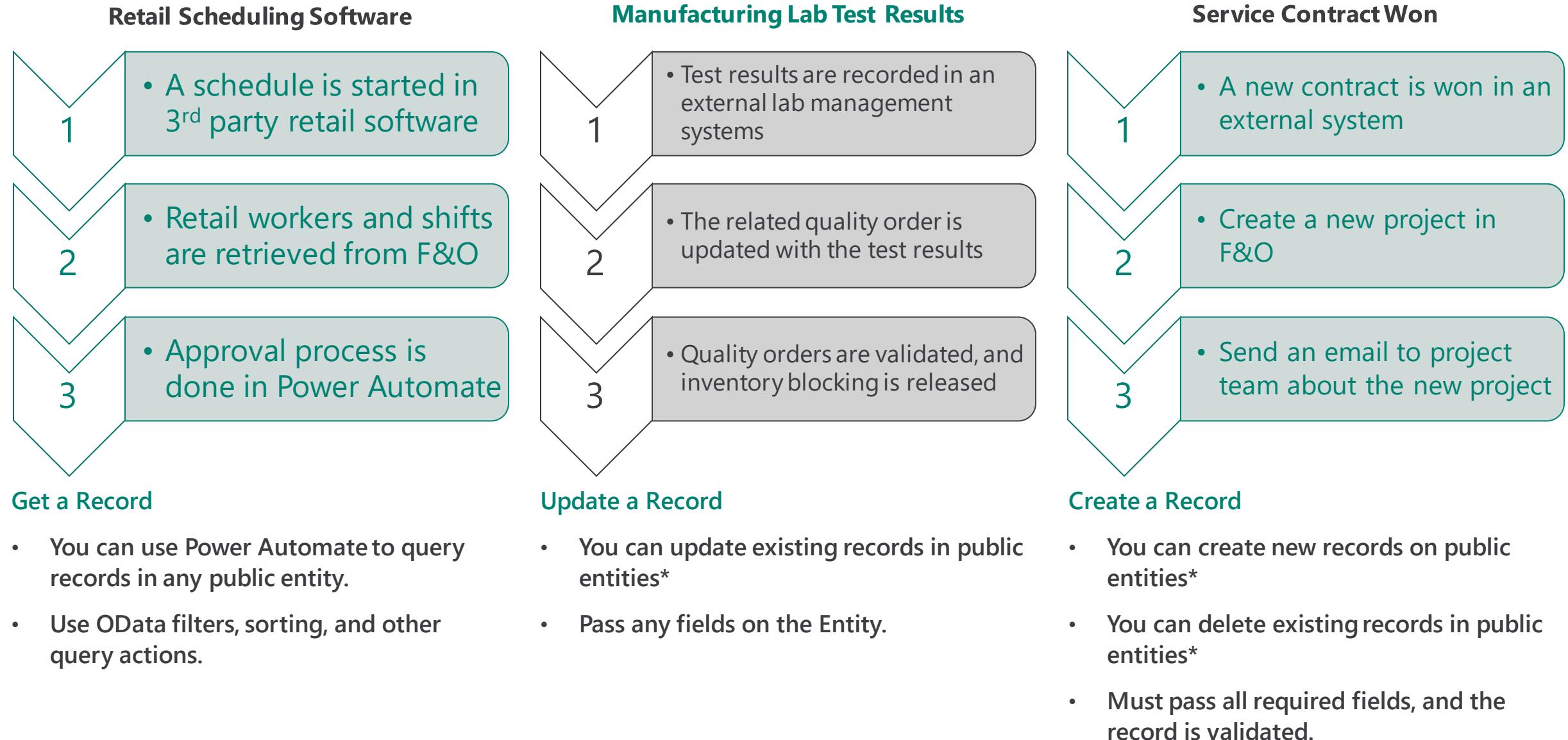
When to use:

- Repetitive tasks
- Cannot create an alert
- No data entity exists

Considerations:

- Must manually click Flow button to start
- Must share or invite others to the flow to use
- New Automate menu coming to F&O soon

Power Automate Use Case 4: Inbound Flows



Power Automate Use Cases: OData Actions

The screenshot shows the 'Actions' section of the Dynamics 365 for Fin & Ops connector in Power Automate. It lists several actions:

- Create record (PREMIUM)
- Lists items present in table (PREMIUM)
- Delete record (PREMIUM)
- Execute action (PREMIUM) - This action is highlighted with a cursor icon.
- Get a record (PREMIUM)
- Get list of entities (PREMIUM)
- Update a record (PREMIUM)

Below the actions, there is a 'Don't see what you need?' section with a 'UserVoice' link.

In this example, you can see the Bill of Materials Header – Approve action.

This actions approves the BOM that you pass in with the personnel number you pass in.

The screenshot shows the configuration of the 'Execute action' step. The 'Action' dropdown is set to 'BillOfMaterialsHeaders-Approve'. The 'approverPersonnelNumber' field is empty.

```
X++  
public class FMRentalEntity extends common  
{  
    [SysODataActionAttribute("ReturnRental", true)]  
    public str ReturnRental()  
    {  
        //do something  
        return "Rental was successfully returned. Thanks for your business";  
    }  
}
```

1. Create a Flow and add a step.
2. Search for Dynamics 365 Fin & Ops Connector.
3. Select Execute action.
4. Select the Instance.
5. Select the Action.
6. Enter additional attributes as required.

Custom OData Actions

- Decorate with [SysODataActionAttribute]
- Can optionally take parameters

Power Automate Use Cases: Custom Business Events



Automate Production Processes

- When a production order is started...
- When a production order is finished...
- When a BOM is approved...

Automate Month End

- When a period is closed
- When a task is completed/created
- When a consolidation is performed
- When a journal is posted

Automate Procurement

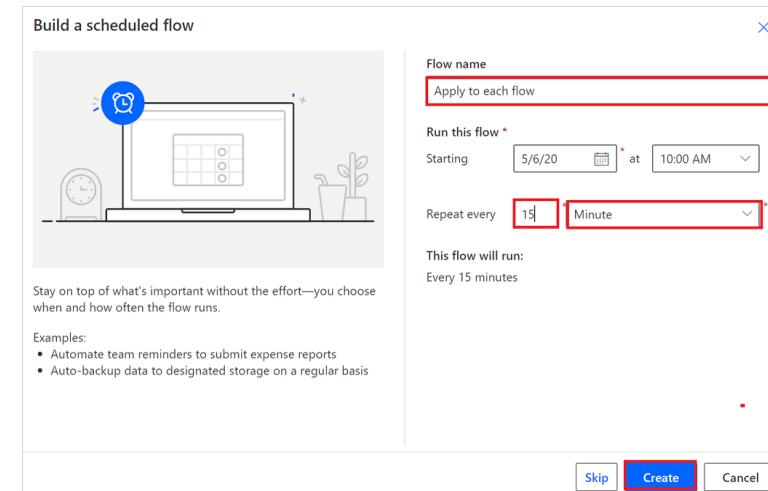
- When a purchase requisition is approved...
- When a purchase order is received...
- When a vendor invoice posted...

Power Automate Use Cases: Scheduled Flows

Once a day, hour, or minutes

On a date that you specify

After a number of days, hours or minutes



The screenshot shows the 'Recurrence' settings dialog. It specifies an interval of 2 weeks, starting on Tuesday at 17:30 UTC-08:00 Pacific Time (US & Canada). The preview shows the flow runs at 17:30 on Tuesday every 2 weeks.

Interval	Frequency
2	Week

Time zone
(UTC-08:00) Pacific Time (US & Canada)

Start time
2018-01-01T12:00:00Z

On these days
Tuesday

At these hours
17

At these minutes
30

Preview: Runs at 17:30 on Tuesday every 2 weeks

Automate Quality Processes

1. Twice a day, create new quality order tests
2. Every hour, update quality order statuses

Automate Month End

1. Copy month end tasks to Teams on specific day of month
2. Automatically perform actions at a specific date and time.

Process a List of Items

1. Check customer credit limits once per day.
2. Check status of journals once per week.
3. Check for timesheets at the end of each day.

UI Flow Use Cases



When a quality order is generated – Create lab test in external lab management system

When a Voucher is Posted – Post in Other ERP

Recruiting system hires a worker from a referral – create worker and referral bonus

Power Apps

Canvas Apps

Low-Code/No-Code drag and drop approach to app development

Model-Driven Apps

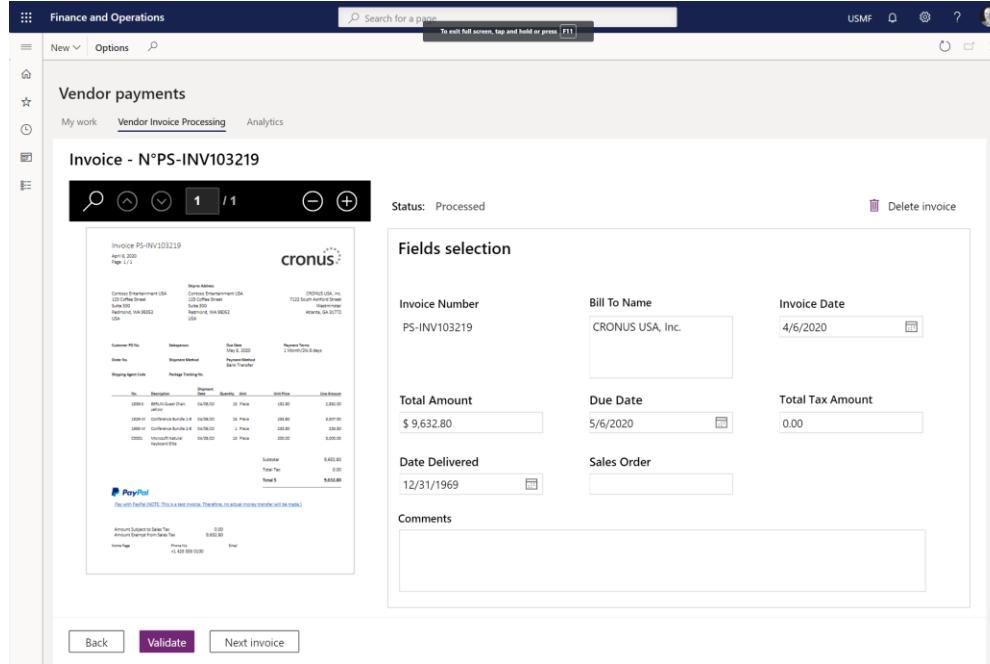
Component focused approach to App Development

Power Apps Portals

Low-Code/No-Code approach to build external web site development

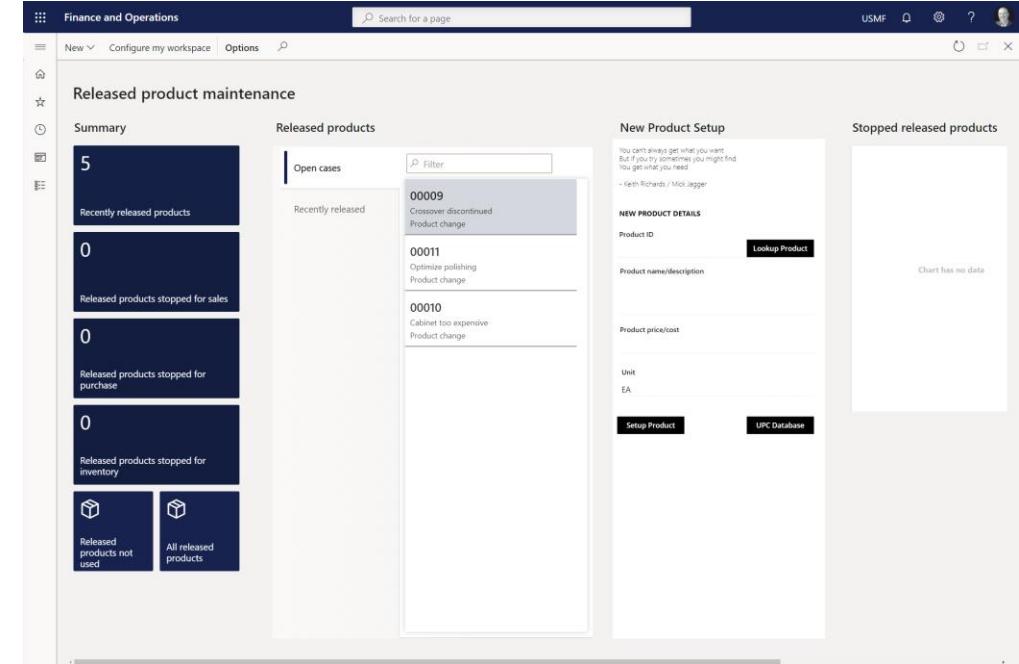


Canvas Apps Use Cases



Embed into a workspace

- Employee referral program
- Customer onboarding and credit application
- Quality order test result entry



Embed into a FastTab

- Show MES information for a Production order
- Show contract information for a Project
- Show telephony information on Customer Service dashboard

Launch from Power Apps button

- IT help desk or case management app
- Employee/project feedback app
- Sales rep capture app for the field

New Product Setup

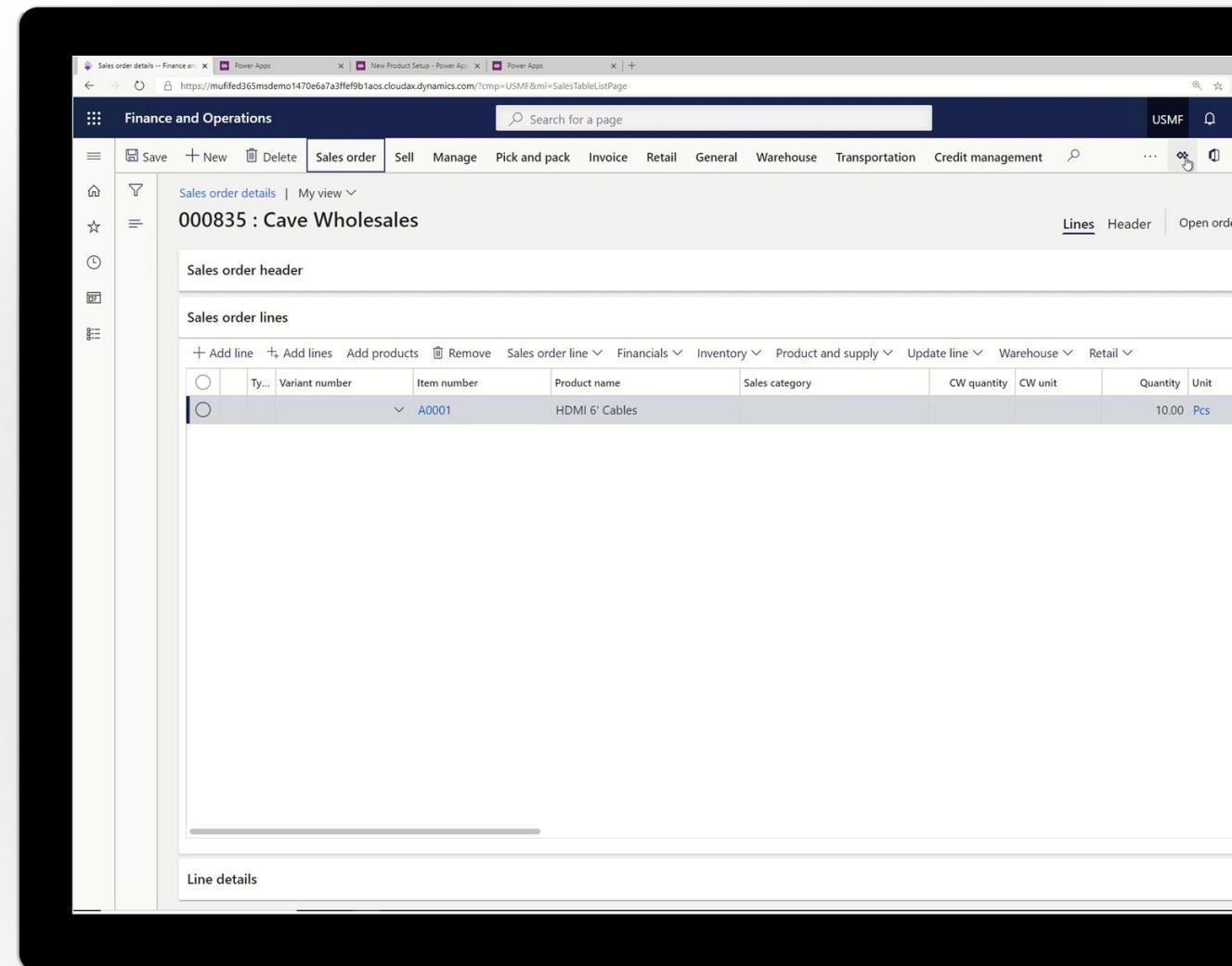
Create order

Product does not exist

Create product

Add product to order

- External database
 - Look up prices and discounts
 - Get the description and details
- Sets up the product through Power Automate
 - Create the product
 - Create the released product
- Use the product on the order immediately
 - Create the order
 - Create the released product



AP Invoice Automation

- Power Automate looks for emails
 - Determines the vendor and form recognizer to use
 - Pulls the invoice into the CDS
- Power App
 - Shows side by side view
- Power Automate to approve
 - Route for review and approval

The screenshot shows the Microsoft Power Apps AI Builder interface. The left sidebar has a dark theme with white text and icons. It includes links for Home, Learn, Apps, Create, Data, Flows, Chatbots, AI Builder (which is selected and highlighted in purple), Build, Models (selected), and Solutions. The main content area is titled 'Models' and shows a table of 'My models'. The table has columns for Name, Model type, Last trained, Permission, and Owner. There are 13 rows listed, each with a small thumbnail icon and some descriptive text. The owner for all models is 'Murray Fife'. The last row is labeled '(Test)'.

Name	Model type	Last trained	Permission	Owner
CONTOSO Invoice Processing Model	Form Processing	16 h ago	Owner	Murray Fife
CRONUS Invoice Processing Model Test	Form Processing	3 wk ago	Owner	Murray Fife
CONTOSO Invoice Processing Model v2	Form Processing	1 mo ago	Owner	Murray Fife
CRONUS Invoice Processing Model	Form Processing	1 mo ago	Owner	Murray Fife
Business Central Invoices	Form Processing	1 mo ago	Owner	Murray Fife
Contoso Invoice Processing V2	Form Processing	1 mo ago	Owner	Murray Fife
AP Invoice Processing	Form Processing	3 mo ago	Owner	Murray Fife
AP Invoice Test 3	Form Processing	-	Owner	Murray Fife
CRONUS AP Invoice Model 4	Form Processing	-	Owner	Murray Fife
Hotel Invoice Processing	Form Processing	-	Owner	Murray Fife
CRONOS Invoice Processing Model (Test)	Form Processing	-	Owner	Murray Fife

Model Driven Apps Use Cases

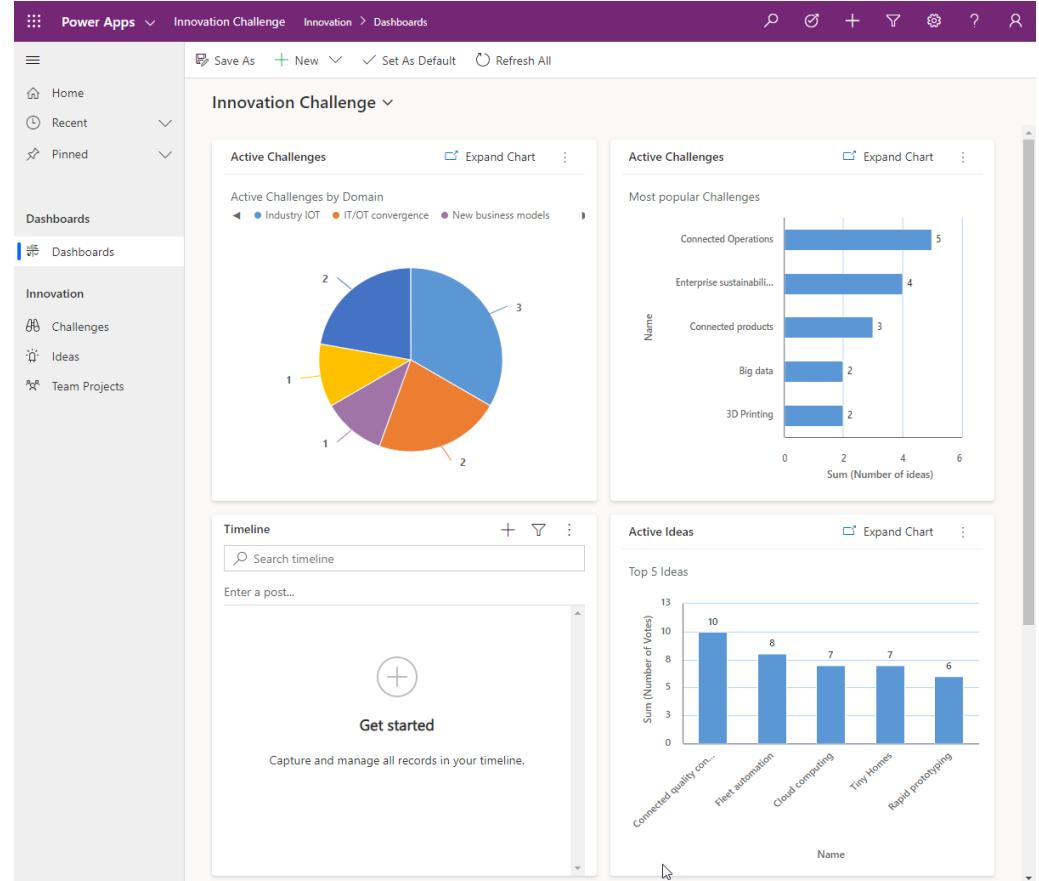
This screenshot shows a Power Apps interface for an 'Asset Checkout' application. The left sidebar includes links for Home, Recent, Pinned, Asset Checkout, Products, Reservations (which is selected), and Reviews. The main area displays a table titled 'Active Reservations' with columns for Name, Product Reservation, Reservation Start, Reserve for (days), and Return by. The table lists 12 entries from Ammar Peterson to Ward Ketchum, each with a unique reservation ID. At the bottom, there's a navigation bar with letters A-Z and a note indicating 1 - 12 of 12 (0 selected).

Retail

- B2B or custom orders app
- Sales rep quality inspection app
- Self-service app/kiosk

Manufacturing

- Shop floor monitoring app
- Scheduling app
- Quality assurance app



Service Industry

- Project contract app
- Site inspection app
- Customer prototyping app

Power Apps Portals Use Cases



Customer Portal

- B2B Portal
- Create orders
- Look up orders

Vendor Portal

- Vendor application
- EDI configuration portal
- Pricing and product portal

Employee Portal

- Company pulse/social media feed
- Company and employee resources
- Request system for HR and IT

Visit a Business Solution

Your **SOCIAL DISTANCING** solution to get to your new “normal” in the office.

- Branch Admin: Power Apps Model Driven app to administer the requests
- Booking App: Power Apps Canvas app for office personnel to book visits on behalf of customers
- Branch App: Power Apps Canvas app for monitoring visitors
- Power Portal:: Power Apps Portal for customers to book their visit.

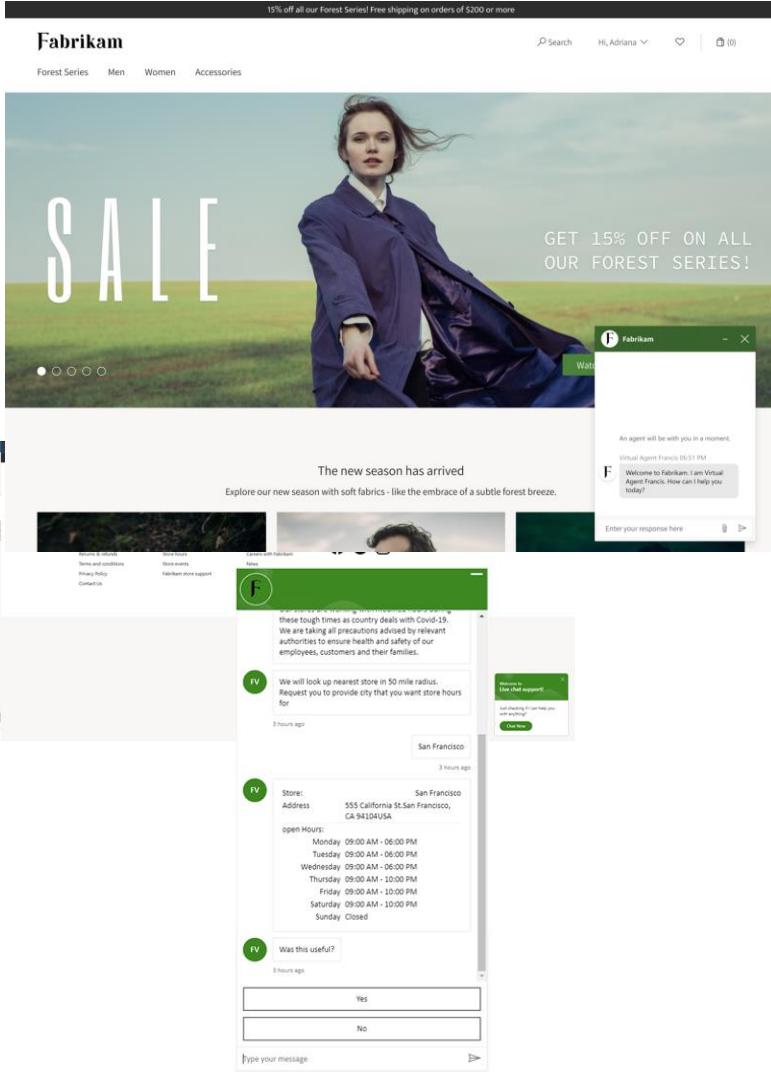
The screenshot shows a Power Apps Portal interface. At the top, there's a banner with the text "Visit a Business Portal" and a "Book A Slot" button (which is circled in red). Below the banner, there's a large orange circle with the text "DISTANCE PLEASE STAND HERE" and two white human figures separated by a double-headed arrow labeled "1.5m". To the left of the banner, there's a small video thumbnail showing people in an office setting. On the right, there's another circular thumbnail showing people at a table. The main content area has a "WELCOME!" heading. It lists the portal's purpose: "This portal helps to:" followed by two bullet points: "Share details about the Gym capacity" and "Book a slot on your preferred time to avoid waiting times". Below this, it says "To check time slots available please click BookSlot" (with the "BookSlot" button circled in red). There are two large numerical displays: "95" under "AllBranches CapacityProvince" and "(Le...)" under "CapacityProvince". To the right of these are two charts: "Capacity by Province" (a map of the Netherlands) and "%Available per BookingDate" (a line chart showing availability over time). At the bottom, there's a dropdown menu for "Branch" set to "Alle" and a link "Select a Branch".

Power Virtual Agents

Power Virtual Agents is the present and future of Conversational User Interface for Business Applications.

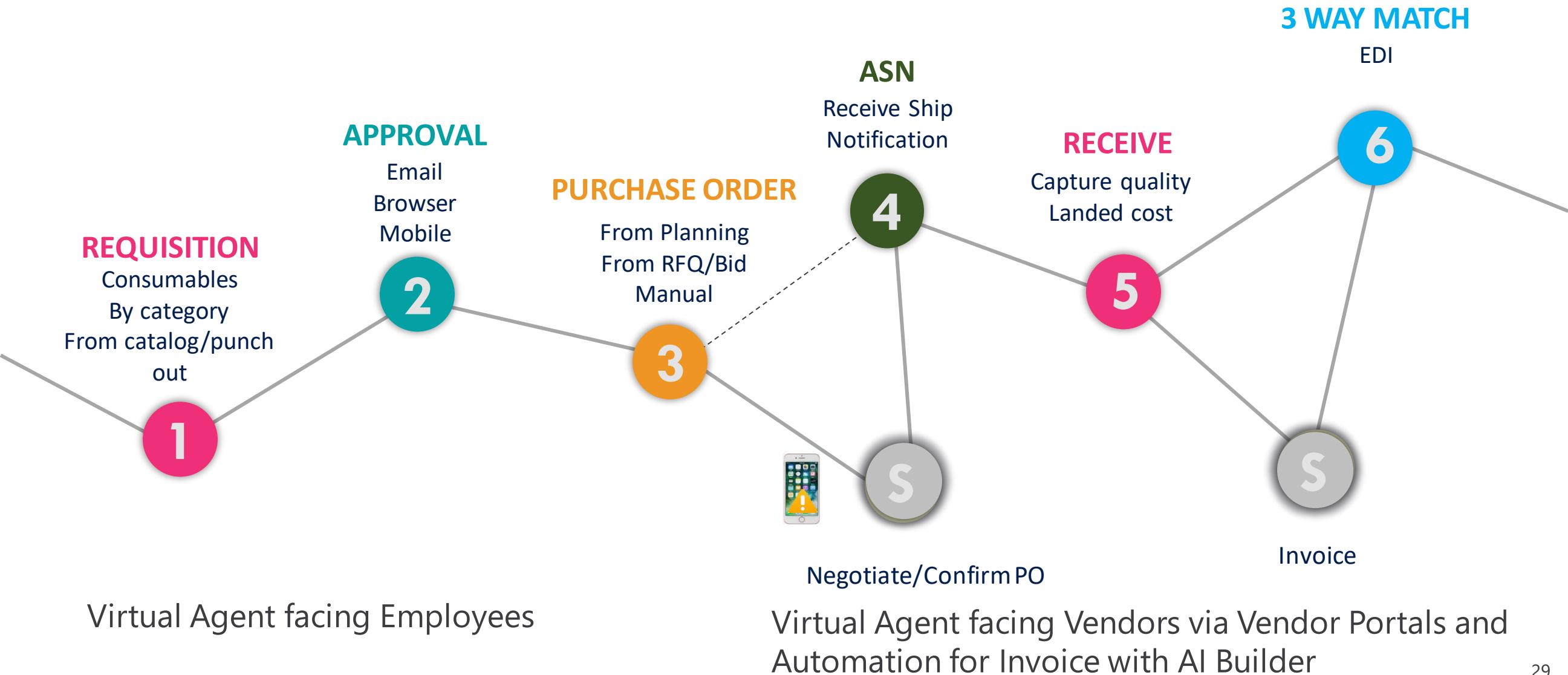


Commerce Chat with Power Virtual Agents

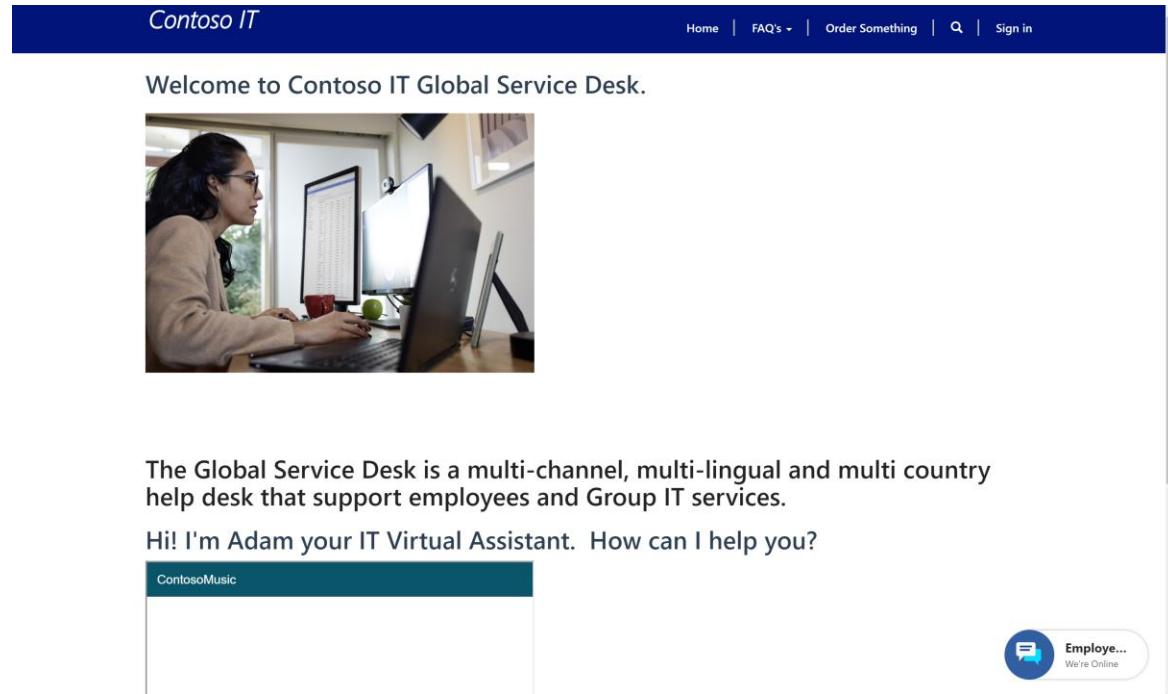


- ❑ Configure chat experience in eCommerce with retailer branding
- ❑ Configure this as proactive chat experience that shows up on specific criteria
 - On specific pages – specific product pages, moving between specific pages
 - Based on number of visits
 - Location based
 - Visibility based on data range
 - Number of items in cart, cart value
 - Trigger specific topic directly based on context
- ❑ Customer context passed directly to Power Virtual Agents
- ❑ Power Virtual Agents Content Pack with headless Commerce API's using Power Automate

Power Virtual Agents Use Case – Procure to Pay



Power Virtual Agents Use Cases



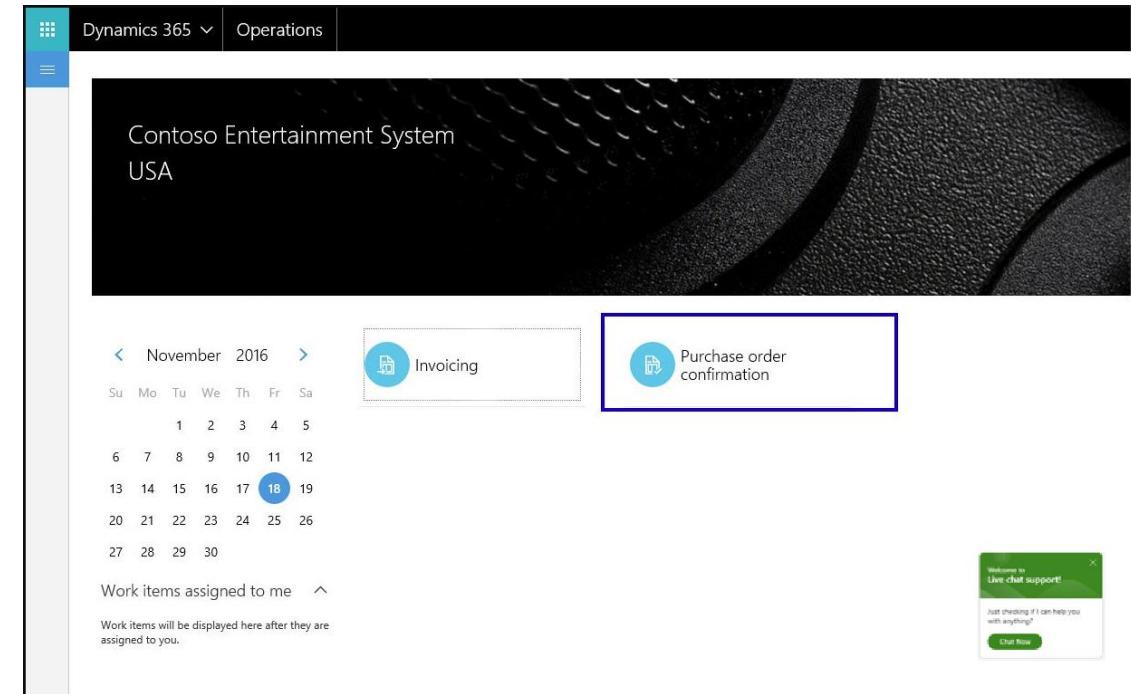
Welcome to Contoso IT Global Service Desk.

The Global Service Desk is a multi-channel, multi-lingual and multi country help desk that support employees and Group IT services.

Hi! I'm Adam your IT Virtual Assistant. How can I help you?

ContosoMusic

Employee...
We're Online



Dynamics 365 Operations

Contoso Entertainment System USA

Invoicing

Purchase order confirmation

November 2016

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Work items assigned to me

Work items will be displayed here after they are assigned to you.

Welcome to Live chat support!

Just checking if I can help you with anything?

Chat Now

Employee Chat Bot

- Embed as part of Employee Self Service Portal
- Ask questions about HR, procurement, benefits and T&E

Vendor facing chatbot

- Embed as part of Vendor Portal
- Answer queries on Vendor onboarding, terms, good receipts, invoice matching and payments

Power Virtual Agents Use Cases - Continued



Quality Management Example

- Embed as third-party app in SCM
- Embed in a Power App
- Ask questions about quality test results

A screenshot of a Business to Business Customer Portal. The top navigation bar includes links for Home, Orders (which is highlighted with a yellow box), Admin, About Us, a search icon, and Customer Representative. Below the navigation is a banner image showing several shipping containers stacked together. The main content area features four cards: "Create Order" (with a "Create" icon), "View Active Orders" (with an "Active Orders" icon), "View Confirmed Orders" (with a "Confirmed Orders" icon), and "View Delivered Orders" (with a "Delivered Orders" icon). Each card has a brief description below it. A green chat support box in the bottom right corner says "Welcome to Live chat support! Just click me if I can help you with anything!" with a "Our Now" button.

Business to Business Customer Portal

- Embed as part of Customer Portal
- Address question on payments, onboarding, products pricing etc.
- Business using Virtual Agents and Power Automate to send proactive messages on overdue collections

Mixed Reality

Dynamics 365 Remote Assist

Empower technicians to collaborate more efficiently by working together from different locations with Dynamics 365 Remote Assist on HoloLens, Android, or iOS devices.

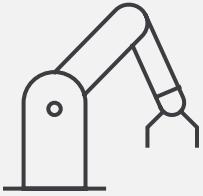
Dynamics 365 Guides

Help employees learn new skills faster with Dynamics 365 Guides on HoloLens devices—no coding required.



Dynamics 365 Remote Assist

Breaking Through Barriers for Digital Transformation

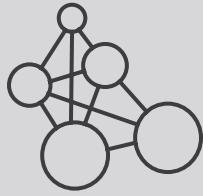


Complexity of machines & systems

Training employees on complex tasks

Reducing time to fix or maintain equipment

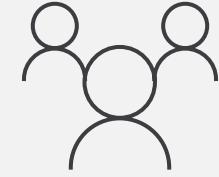
Keeping employees safe on the job



Multiple data systems

Integrating relevant data into existing workflows

Connected data from IoT devices



Changing workforce

Onboarding new generation of employees

Transferring knowledge from aging workforce

Reducing turnover of contractors

Dynamics 365 Remote Assist Use Cases



Commerce – Contactless Shopping and Service

- Collaborate with store personnel for purchasing help
- Collaborate with Service Technician for Customer Service



Internal Quality/Production Outage

- Collaborate with remote personnel
- Monitor and adjust safety procedures
- See what's happening on the floor real-time
- Train users on new equipment



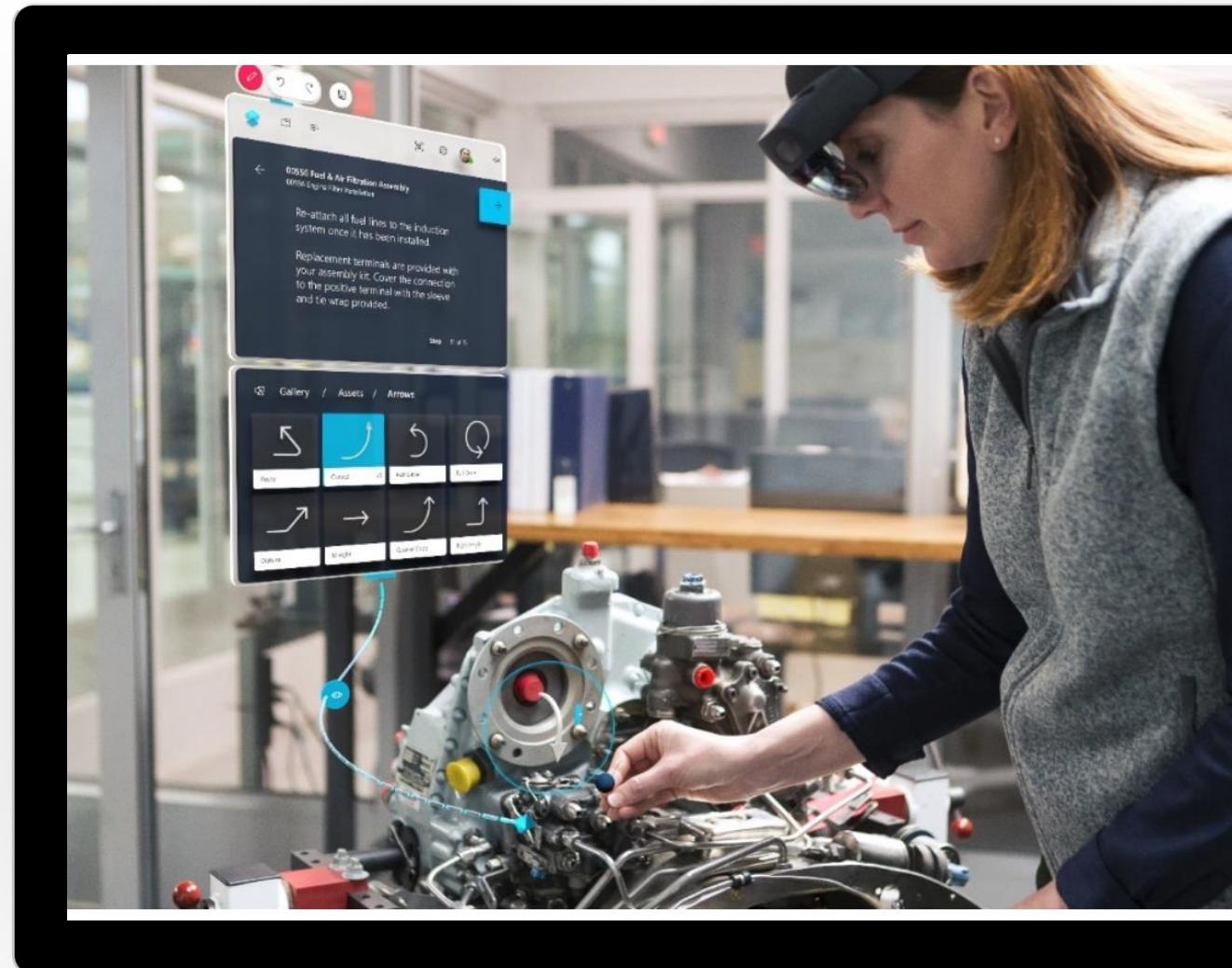
Field Service/Asset Management

- Collaborate with back office personnel
- Integrate with IoT data and devices
- Integrate data into existing workflows and business processes

Integrate Asset Management with Dynamics 365 Guides

Setup Process

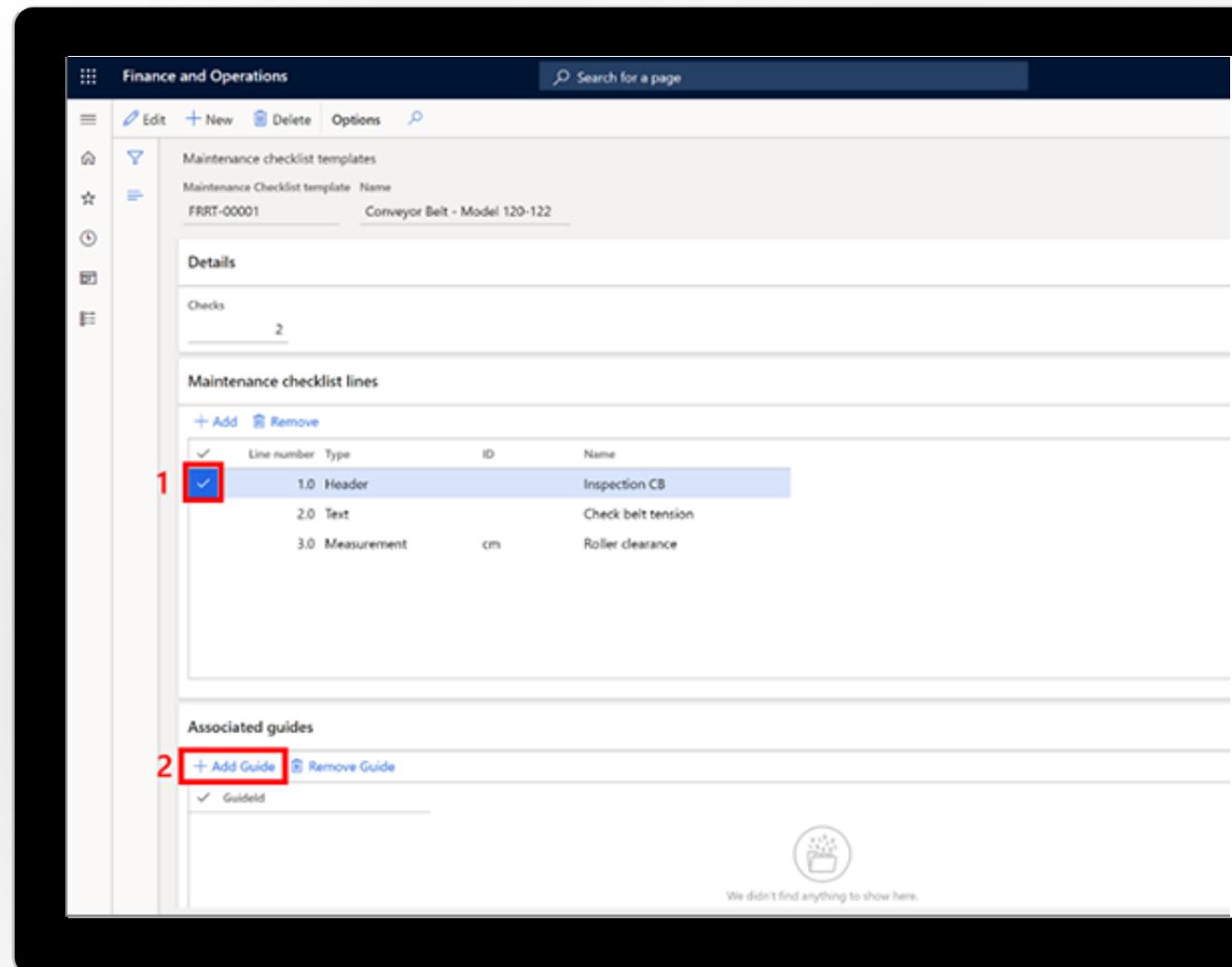
- 1 • Configure Dual Write
- 2 • Flight MRGuidesFeature
- 3 • Enable Config Keys
- 4 • Setup guides



Integrate Asset Management with Dynamics 365 Guides

Configuration Process

- 1 • Use the PC to create a guide
• Use the HoloLens to place holograms
- 2 • Create a Maintenance checklist template
- 3 • Link the guide to the template
- 4 • Create and process work orders



Extension Scenarios with Dynamics 365 Guides



Manufacturing Execution Guides

- Extension to add Guides to the operation instructions
- Extension to see guides from the job card device



Quality Order Guides

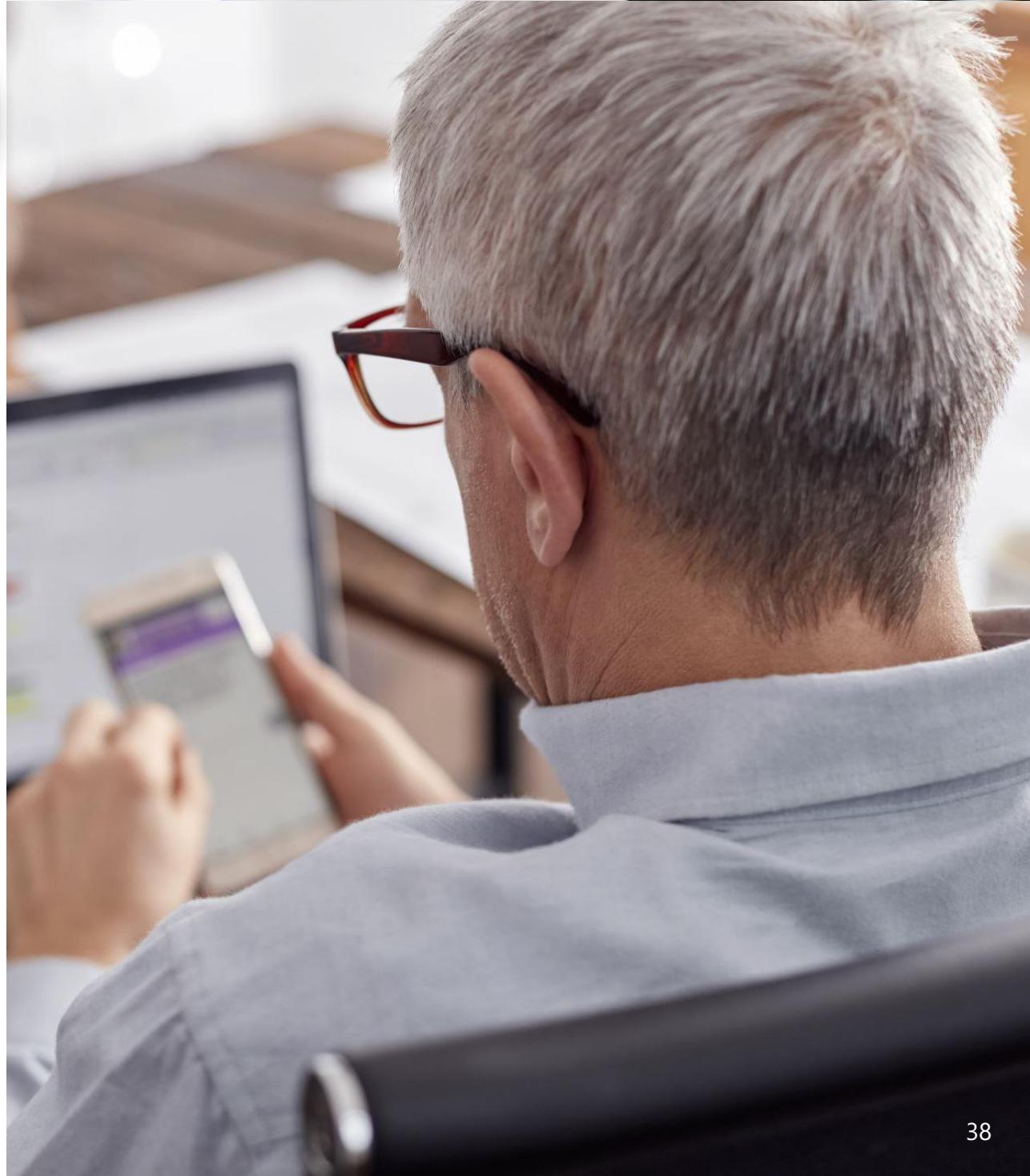
- Extension to add guides to tests or test groups
- Extension to see guides from the quality order

Dynamics 365 Customer Voice



Formerly Forms Pro

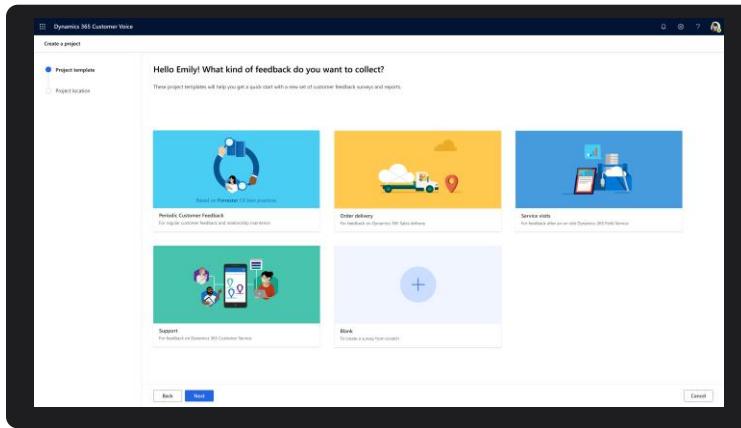
Gather and track the customer metrics that matter to your business based on survey data, and then rapidly act as insights surface—all with Dynamics 365 Customer Voice.



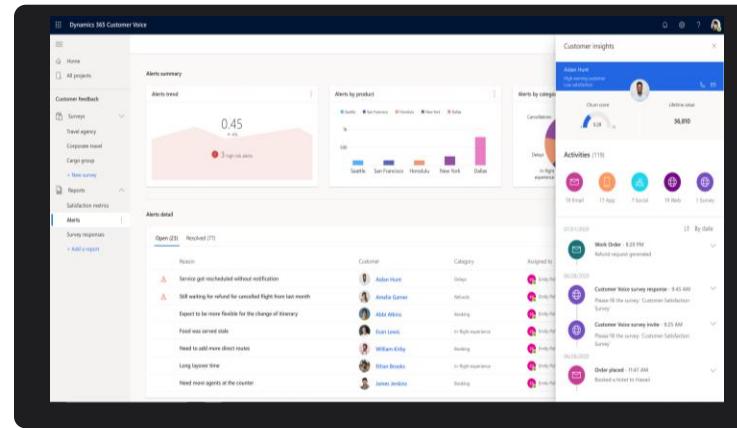


Dynamics 365 Customer Voice

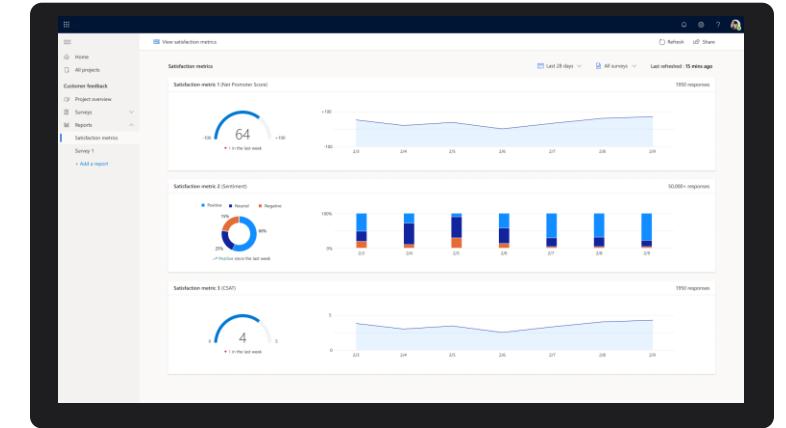
Simple-yet-powerful feedback management solution



Capture feedback
instantly



Integrate data for deeper
customer insights



Drive action with
real-time feedback



Dynamics 365



Power BI



Power Automate

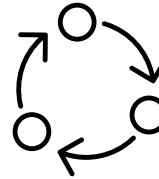


Power Apps



Customer Voice

Customer Voice Order Satisfaction Use Case



Collect Data

- Ask about shipping quality
- Ask about product quality
- Net promoter scores

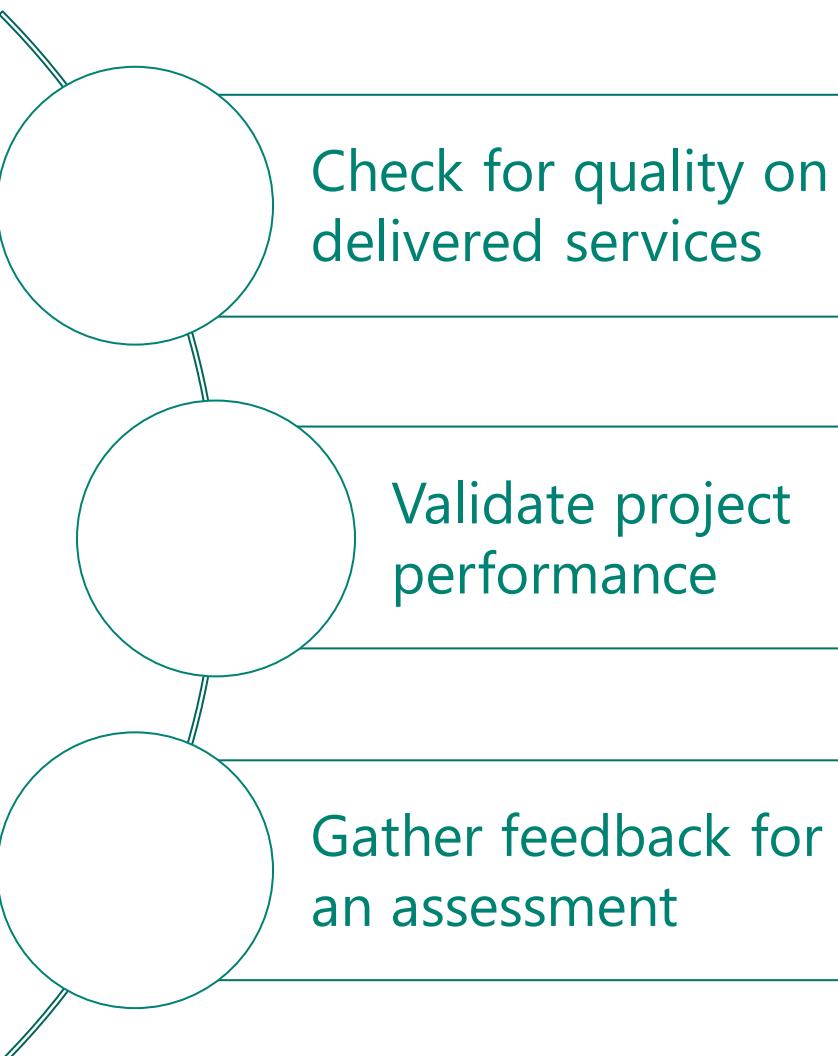
Analyze Data

- Analyze customer sentiment
- Review individual responses
- Analyze trends

Automate Processes

- Notify product and shipping managers when there is a problem
- Send surveys automatically
- Integrate with Power Automate

Customer Voice Quality Check Use Case



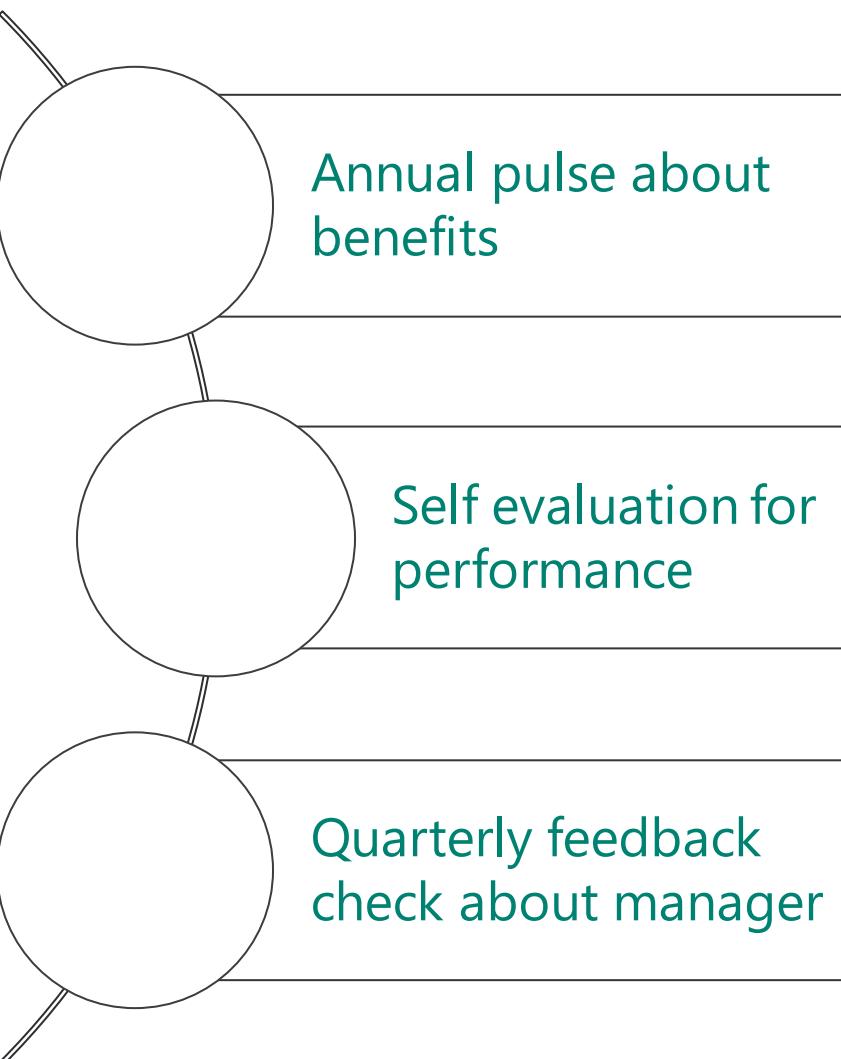
Embedding Experiences

- ✓ Embed as a third-party web app through Personalization
- ✓ Embed in a Model-Driven Power App
- ✓ Add a link to a workspace
- ✓ Mash up survey results with F&O data with Power BI

Automation Experience

- ✓ Use Power Automate to automatically send from a CRUD update on a virtual entity
- ✓ Create a business event and use Power Automate
- ✓ Create a button extension to call custom logic
- ✓ Automatically update F&O with response data

Customer Voice Employee Satisfaction Use Case



Embedding Experiences

- ✓ Embed as a third-party web app through Personalization
- ✓ Embed in a Model-Driven Power App
- ✓ Add a link to a workspace

Automation Experience

- ✓ Use Power Automate from a CRUD on the CDS
- ✓ Create an Alert rule to trigger a Power Automate
- ✓ Automatically update HR with response data
- ✓ Mash up survey results with HR data with Power BI

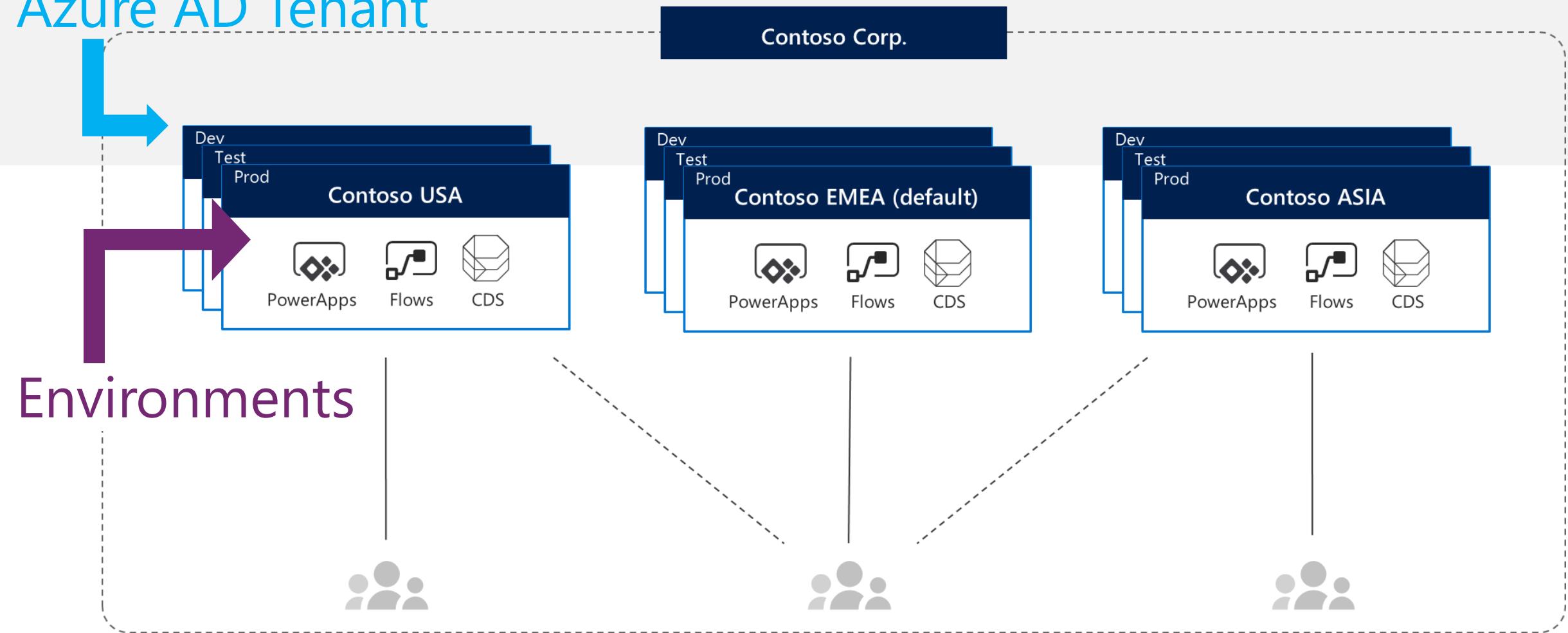
Application Lifecycle Management



Environments

Environments are containers that administrators can use to manage apps, flows, connections, and other assets; along with permissions to allow organization users to use the resources

Azure AD Tenant



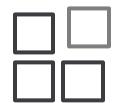
Environment – Key facts



Tied to geographic location



Target different audiences



Every tenant has Default



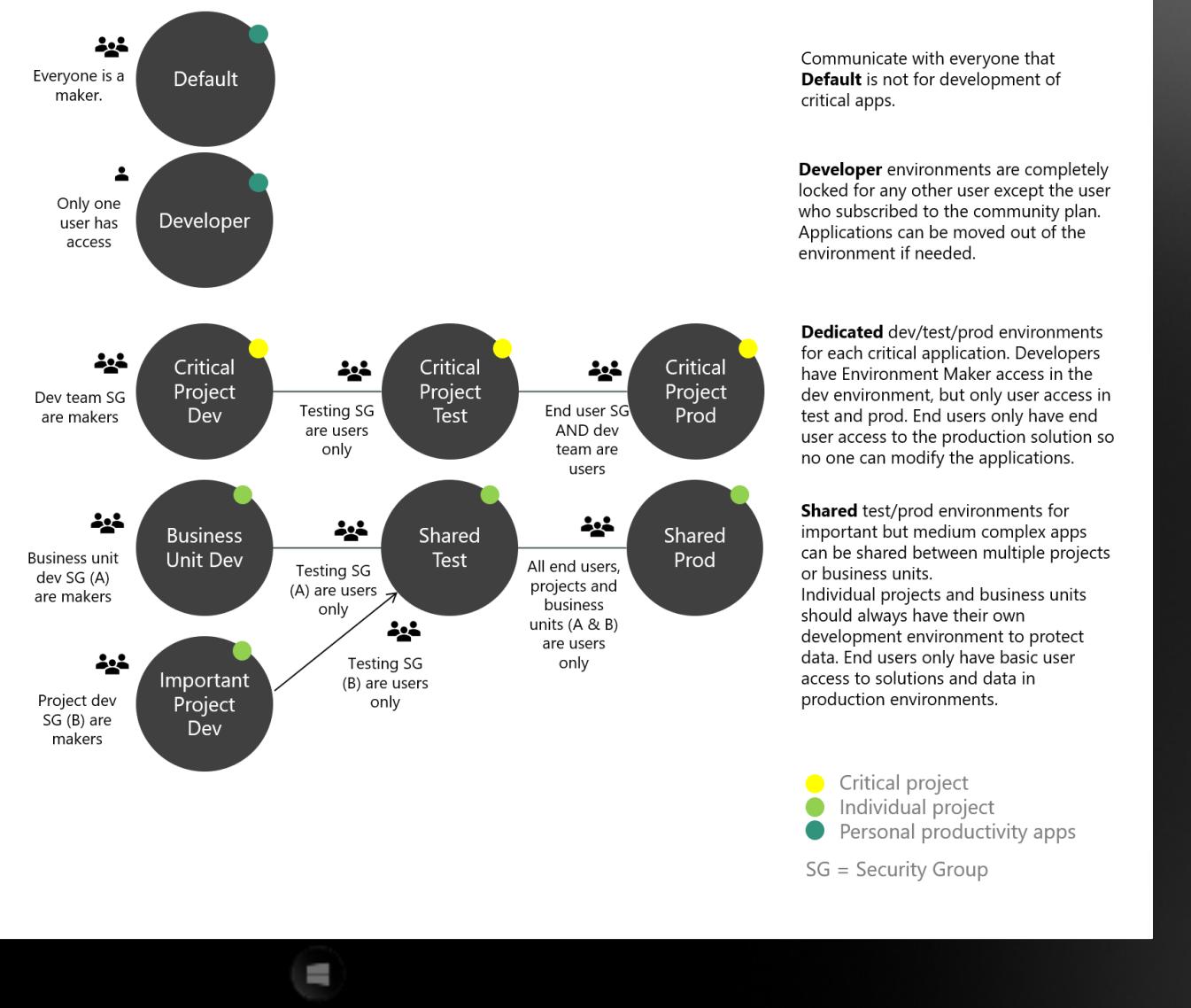
Non-default have greater control

The screenshot shows the Power Platform Admin Center interface with the title "Admin center (preview)" at the top. On the left is a vertical navigation bar with icons for Home, Settings, Governance, and Environment Overview. The main content area is titled "Environments". It lists several environments with columns for "Environment", "Type", and "..." (More options). The environments listed are:

Environment	Type	...
Test	Product	...
Admin Test Basic 12	Product	...
Sandbox environment	Product	...
Testing environment	Product	...
Build demo environment	Product	...
Microsoft (default)	Default	...

On the right side of the screenshot, there is a sidebar titled "Settings" with the sub-section "Governance". It includes a note: "These settings are organization-wide." Below this are sections for "Who can create environments" with two radio button options: "Everyone" (selected) and "Only specific users"; and "Who can create test environments" with the same two options.

Establishing an Environment Strategy



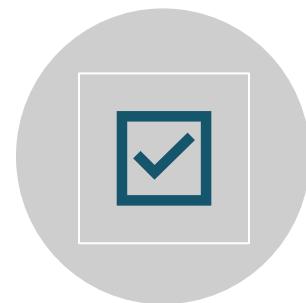
- Assign admins the Power Platform Service admin role
- Restrict the creation of new environments to admins.
- Treat the default environment as a 'Personal productivity'
- Establish a process for requesting access or creation of environments.
 - Environments for specific business groups or applications
 - Individual-use environments for POCs and trainings



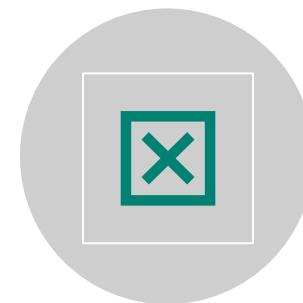
PACKAGE AND MAINTAIN
COMPONENTS



CREATED AND AUTHORED
BY A PUBLISHER



MANAGED



UNMANAGED

Solutions



Data Model

Entities
Attributes
Forms
Views
Charts
Relationships
Global Option Sets



User Interface

Model Apps
Canvas Apps
Web Resources
PCF Controls
Dashboards
Sitemap
Dialogs



Process/Code

Assemblies
Custom Activities
Plug-ins
Workflow Definitions
Flows
Workflow
Business Process
Rules



Other

Reports
Templates
Security Roles
FLS Profiles
System Settings (transport
only)
Virtual Entities
App Modules



Solution DO's and DON'Ts

DO's

- ✓ Use the same publisher in all solutions
- ✓ Include only changed assets
- ✓ Use source control
- ✓ Ship managed solutions
- ✓ Automate your ALM
- ✓ Use the Solution Checker
- ✓ Use the Solution Packager

DON'Ts

- ✓ Use the default publisher
- ✓ Use multiple publishers
- ✓ Include the entire entity
- ✓ Click add all assets button
- ✓ Use unsupported customization techniques

Power Platform Build Tools for Azure DevOps

Automate common build and deployment tasks

- provisioning/de-provisioning of environments
- synchronization of solutions
- generate build artifacts
- deploy to downstream environments
- run the solution checker



INSTALL



BUILD PIPELINE
TO EXPORT
FROM DEV



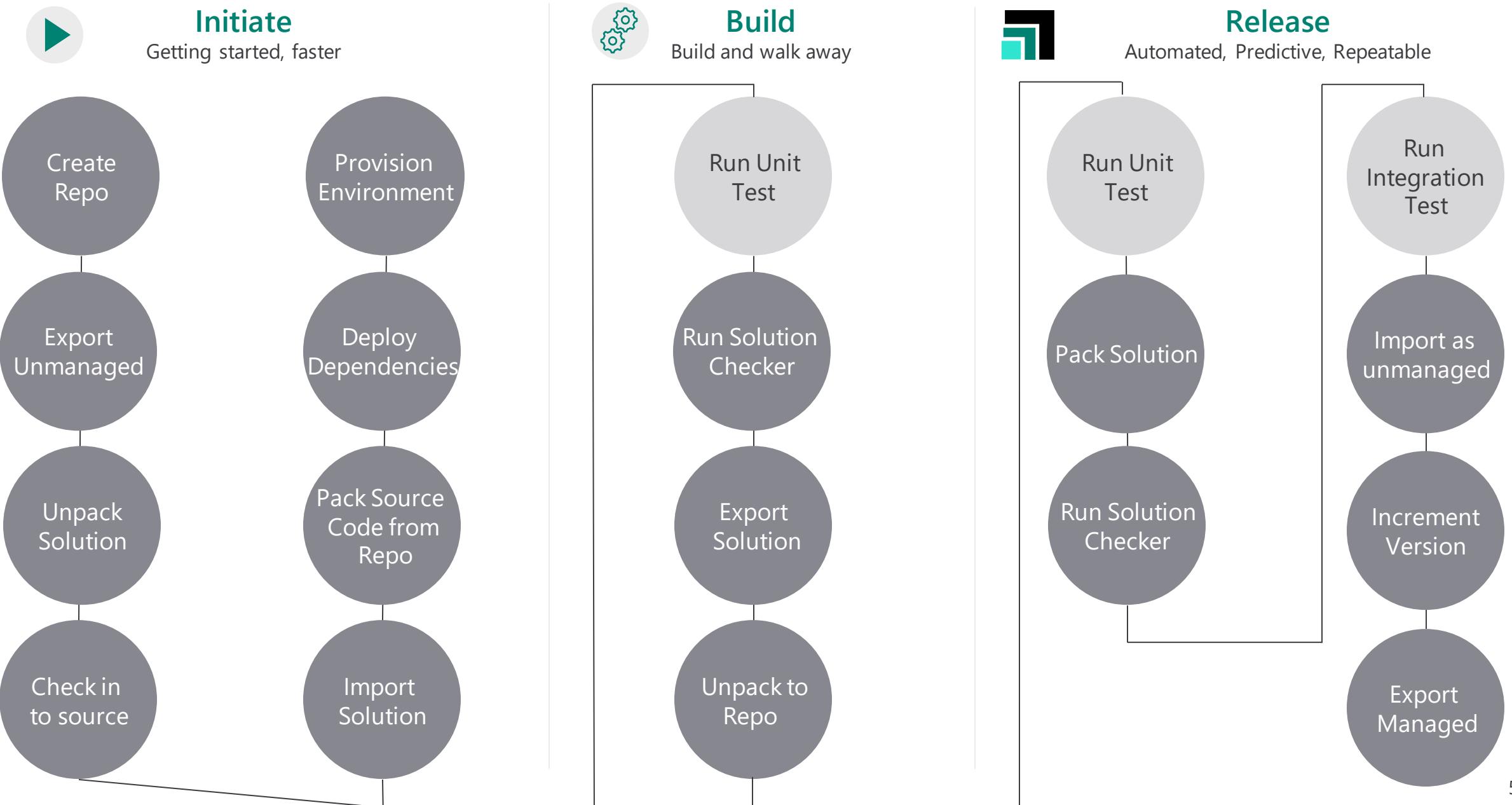
BUILD PIPELINE
TO GENERATE
BUILD ARTIFACT



RELEASE
PIPELINE TO
DEPLOY TO
PRODUCTION

The screenshot shows the Azure DevOps Pipelines interface for a project named 'DevOpsDemo'. On the left, a sidebar lists various DevOps services: Overview, Boards, Repos, Pipelines (which is selected), Builds, Releases, Library, Task groups, Deployment groups, Test Plans, and Artifacts. The main pane displays a 'Create Export from Dev' pipeline. It starts with a 'Get sources' task for the 'DevOpsDemo' repository, followed by an 'Agent job 1' which runs the 'PowerApps Tool Installer' task. Other tasks listed include 'PowerApps Export Solution', 'PowerApps Checker', 'PowerApps Unpack Solution', 'Commit Solution to Repo', and 'PowerApps Import Solution'. A 'Save & queue' button is at the top right.

ALM Powered by Azure DevOps



Upcoming Sessions in the Series

Part 2: The Common
Data Service

September 9/10th

Part 3: Power
Automate

September 23/24

Part 4: UI Flows
October 7/8th

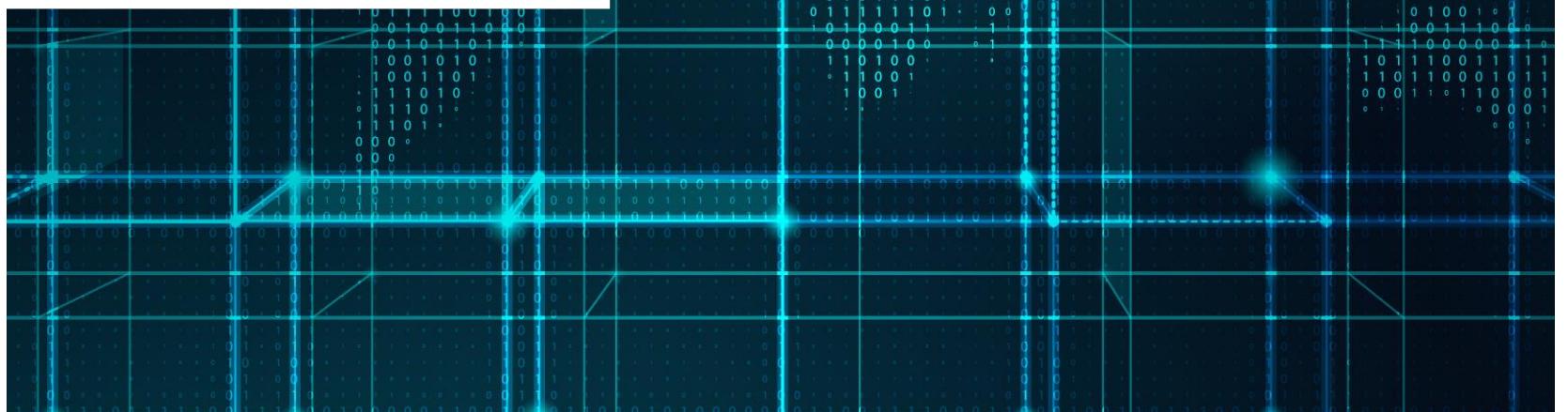
Part 5: Power Apps-
Canvas Apps
October 21/22nd

Thank you!

Have an idea how we can improve Dynamics 365?

Please visit <https://experience.dynamics.com/ideas/> to share and upvote.

Appendix of Resources



Power Automate Resources



The screenshot shows the Microsoft Power Automate documentation homepage. It features a navigation bar at the top with links for Power Automate, Templates, Connectors, Learn Power Automate, Docs, Power Platform, and Power Automate. Below the navigation is a search bar and a filter by title dropdown. The main content area is divided into several sections: "About Power Automate" (with links to Overview, Button flows, Scheduled flows, Approval flows, Microsoft Teams Flows, Business process flows, UI flows, Solutions, Common Data Service, How to, Troubleshoot, Connect to data, For developers, Administration, Reference, and Learn from others), "Create flows using Power Automate" (with links to Overview, GET STARTED, What is UI flows?, HOW TO GUIDE, Set up UI flows, Create desktop UI flows, Use Softwinn's WinAutomation (NEW!), Create web UI flows, Run UI flows, VIDEO, and UI flows videos), "Do more with your flows" (with links to HOW TO GUIDE, Use AI Builder for AI-infused flows, Use adaptive cards, Use data operations, Use expressions and functions, Use Voice to model flows, CONCEPT, Power Automate for developers, ISVs, and partners), and "Support and licensing" (with links to OVERVIEW, Distribute flows using solutions, HOW TO GUIDE, Create a flow in a solution, Export solution, Import solution, REFERENCE, Troubleshoot a flow, Use Power Automate checker, Power Automate community, Power Automate blog, Power Automate licensing, Power Automate US Government plans).

The screenshot shows the Microsoft Learn Power Automate platform. It displays six learning paths arranged in a grid:

- a business process using Power Automate** (Learning Path, Beginner, Business User)
- Prepare to complete the Project Specialist Technical Achievement** (Learning Path, 7 hr 9 min, Microsoft 365, Business User, Beginner)
- Architect solutions for Dynamics 365 Power Platform** (Learning Path, 3 hr 57 min, Dynamics, Solutions Architect, Advanced)
- Business process flow in Power** (Learning Path, Intermediate, App Maker)
- Get started with Power Automate buttons** (Learning Path, 4 hr 30 min, Power Platform, Functional Consultant, Intermediate)
- Use best practices to secure an Power Automate environment** (Learning Path, 4 hr 35 min, Power Platform, Administrator, Intermediate)

The screenshot shows the Microsoft Power Automate YouTube channel page. At the top, it says "Microsoft Power Automate" with 19.0K subscribers. Below that are tabs for VIDEOS, PLAYLISTS, COMMUNITY, CHANNELS, and ABOUT. A search bar is also present. The main content area features a video thumbnail for "WinAutomation in Microsoft Power Automate" (2,173 views, 1 week ago) with a description: "Watch this overview video to learn about the new Robotic Process Automation (RPA) capabilities now available in Microsoft #PowerAutomate. You'll learn some tips and tricks on how to start automating without APIs using the RPA capabilities with WinAutomation." Below the video are other video thumbnails, including "Power Automate" (PLAY ALL), "Microsoft Power Automate overview" (1:54, 69K views, 4 months ago), "Introduction to Microsoft Power Automate" (12:30, 129K views, 8 months ago), "Learn about robotic process automation in Power..." (11:08, 46K views, 8 months ago), and "Microsoft Power Automate | 2019 release wave 2..." (11:08, 14K views, 11 months ago). On the right side, there are "FEATURED CHANNELS" with links to Microsoft Power Automate, Microsoft Power Automate, Microsoft Power Automate, Microsoft Power Automate, and Microsoft Power Automate.

Documentation

- 6 Tracks
- 100's of pages

Learn Power Automate

- 6 Learning Paths
- 31 Modules
- 2 Certifications

Videos

- 50+ videos
- 8 Playlists
- Subscribe and collaborate

Power Apps Resources



Documentation Learn Q&A Code Samples Search

Support Partners Blog Pricing

Documentation

- What is Power Apps?** Get started on documentation with an overview about Power Apps.
- What's new** Learn about new features released in the past few weeks, and releasing in the coming months.
- Learning catalog** Find the right online training events for your role as a user.
- Blog** Read the official Power Apps blog to know about the latest Power Apps features and announcements.
- Community** Connect with peers, share ideas, and learn from experts in the Power Apps community forum.
- Licensing** Understand various licensing options.

The screenshot shows a grid of learning paths and modules:

- Learning Path: a business process using Power Automate** (Business User, Beginner)
- Learning Path: Prepare to complete the Project Specialist Technical Achievement** (Microsoft 365, Business User, Beginner)
- Learning Path: Architect solutions for Dynamics 365 Power Platform** (Dynamics, Solutions Architect, Advanced)
- Learning Path: business process flow in Power Automate** (App Maker, Intermediate)
- Learning Path: Get started with Power Automate buttons** (Power Platform, Functional Consultant, Intermediate)
- Learning Path: Use best practices to secure an Power Automate environment** (Power Platform, Administrator, Intermediate)

A video frame showing three people (two men and one woman) sitting at a table with a laptop, discussing Power Apps. The background features a purple screen with the text "#LessCodeMorePower" and various Power Apps icons. The video player shows a timestamp of 18:19.

Documentation

- 6 Tracks
- 100's of pages

Learn Power Apps

- 22 Learning Paths
- 78 Modules
- 4 Certifications

Videos

- 150+ videos
- 10 Playlists
- Subscribe and collaborate

Power Virtual Agents Resources



SOS Documentation Learn Q&A Code Samples

Power Virtual Agents

Power Virtual Agents documentation

Build chatbots easily with Power Virtual Agents.

About Power Virtual Agents

- OVERVIEW
- Power Virtual Agents overview
- Get started quickly with Power Virtual Agents

Object Rights (DSR) requests

CREATE

Create bots and topics

- GET STARTED
- Create your first bot
- Use topic lessons
- Create and edit topics

Enhance bot topic

- REFERENCE
- Use Entities
- Create topics from existing
- Use end-user authentication
- Use Microsoft Power Automate
- Use hand-off to a human

MONITOR AND DIAGNOSE

- REFERENCE
- Use analytics to improve your bot
- Analyze bot performance and usage

PUBLISH AND INTEGRATE

- REFERENCE
- Configure demo and live websites
- Publish to Microsoft Teams
- Publish to Facebook

Documentation

- 6 Tracks
- 100's of pages



Empower subject matter experts to drive engagement in your business using Power Virtual Agents

Cleber Mori; Emma Archer; Omar Aftab; Pawan Taparia

Learn more about how customers are improving engagement and productivity and reducing costs through personalized conversational intelligent virtual agents. In this session, get an overview of all new...

Build a bot that integrates with your backend systems with Power Virtual Agent

Marina Kolomiets; Pawan Taparia; Salem Bacha

Learn how to integrate Microsoft Power Virtual Agents with your backend systems to enable bots to act on behalf of your users. As part of this session, we cover invoking Power Automate flows and call...

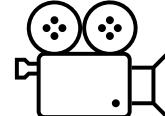
Best practices for building an intelligent bot with Power Virtual Agents

Murali Kumanduri

Learn more about best practices that our customers follow to build successful virtual agents. This session covers what it takes to build a virtual agent that provides the best business outcomes, and how to improve your virtual agent and drive engagement...

Training

- PVA in a day
- Best Practices and sessions from MBAS



Videos

- 15+ videos
- 4 Playlists
- Subscribe and collaborate

Common Data Service Resources



Documentation Learn Q&A Code Samples

Support Partners Blog Pricing

Documentation

- What is Power Apps?**
Get started on documentation with an overview about Power Apps.
- What's new**
Learn about new features released in the past few weeks, and releasing in the coming months.
- Learning catalog**
Find the right online training events for your role as a user.
- Blog**
Read the official Power Apps blog to know about the latest Power Apps features and announcements.
- Community**
Connect with peers, share ideas, and learn from experts in the Power Apps community forum.
- Licensing**
Understand various licensing options.



- Learning Path**
a business process using Power Automate
7 hr 9 min
Business User Beginner
- Learning Path**
Prepare to complete the Project Specialist Technical Achievement
7 hr 9 min
Microsoft 365 Business User Beginner
- Learning Path**
Architect solutions for Dynamics 365 Power Platform
3 hr 57 min
Dynamics Solutions Architect Advanced
- Learning Path**
Get started with Power Automate buttons
4 hr 30 min
App Maker Intermediate
- Learning Path**
Use best practices to secure an environment
4 hr 35 min
Power Platform Administrator Intermediate

Documentation

- 9 Major Topics
- 100's of pages

Learn CDS

- 3 Learning Paths
- 23 Modules
- 2 Certifications

Industry Accelerators Resources



[Microsoft](#) | [Docs](#) [Documentation](#) [Learn](#) [Q&A](#) [Code Samples](#)

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/ Common Data Model / Industry accelerators / Overview

Sort by title

Common Data Model

ut Common Data Model

mon Data Model Technical

de

stry accelerators

Review

Automotive accelerator

ducation accelerator

Overview

Higher education

K-12 education

ncial services accelerator

lthcare accelerator

anufacturing accelerator

edia and communications

coerator

onprofit accelerator

emplates

re Data Lake

ty Reference

Reference

Overview of industry accelerators

05/04/2020 • 2 minutes to read • 2

Common Data Model enables horizontal consistency for customers' business data, making it easier for them to create value from that data. However, many customers and partners want solutions and platforms that are tailored for their industry. Microsoft is working closely with representatives from various industries to make Common Data Model more relevant to them, by creating industry accelerators.

Industry accelerators are foundational components within Microsoft Power Platform and Dynamics 365 that enable ISVs and other solution providers to quickly build industry vertical solutions. The accelerators extend Common Data Model to include new entities to support a data schema for concepts within specific industries. Microsoft is currently focused on delivering accelerators for the following industries, with others to come:

- Automotive
- Financial services, including banking and insurance
- Healthcare
- Education, including higher education and K-12
- Nonprofit
- Manufacturing
- Media and communications

ISV opportunity view

Microsoft Power Platform combines with industry accelerators to create a unique opportunity for ISVs to provide solutions for different industries and levels of development. This image shows

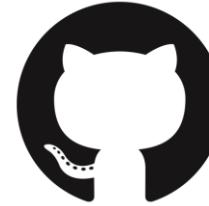
Documentation

- [Industry Accelerators Docs](#)
- [Blog](#)



AppSource

- [Automotive](#)
- [Education](#)
- [Financial services](#)
- [Healthcare](#)
- [Manufacturing](#)
- [Media and communications](#)
- [Nonprofit](#)



GitHub

- [Automotive](#)
- [Education](#)
- [Financial services](#)
- [Healthcare](#)
- [Manufacturing](#)
- [Media and communications](#)
- [Nonprofit](#)

Mixed Reality Resources



Overview of Dynamics 365 Remote Assist

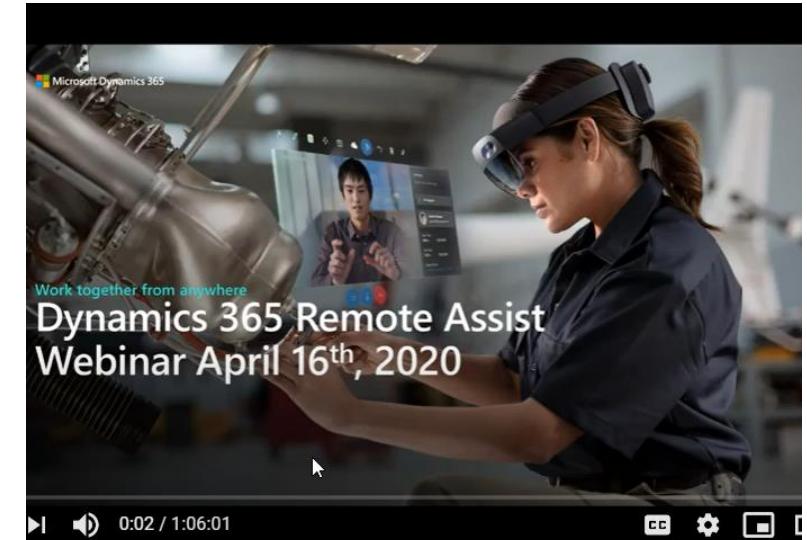
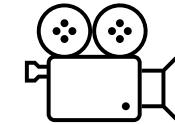
04/01/2020 • 7 minutes to read •

Empower technicians to collaborate more efficiently by working together from different locations with Dynamics 365 Remote Assist on HoloLens, HoloLens 2, Android, or iOS devices.



The screenshot shows a grid of learning resources:

- MODULE**
Introduction to Dynamics 365 Field Service
51 min ★★★★★ 4.7 (505)
Dynamics 365 Business User Beginner
- MODULE**
Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service
20 min ★★★★★ 4.6 (14)
Dynamics 365 Functional Consultant Intermediate
- LEARNING PATH**
Solve problems in real time with Dynamics 365 Remote Assist
1 hr 26 min ★★★★★ 4.4 (16)
Dynamics 365 Administrator Intermediate
- MODULE**
Get started with making Remote Assist calls
1 hr 6 min ★★★★★ 4.4 (16)
Dynamics 365 Functional Consultant Intermediate



Documentation

- [Dynamics 365 Guides](#)
- [Dynamics 365 Product Visualize](#)
- [Dynamics 365 Remote Assist](#)
- [3D Content Guidelines](#)

Learn

- [Learn Remote Assist](#)
- [Product Visualize Blog](#)
- [Guides Blog](#)

Videos

- [Remote Assist YouTube](#)
- [Guides YouTube](#)

Dynamics 365 Customer Voice Resources



Microsoft Forms Pro documentation

A simple yet comprehensive survey solution that builds on the current survey-creation experience of Microsoft Forms in Microsoft 365. It makes capturing and analyzing customer and employee feedback simpler than ever. Your customers can respond to surveys in any web browser or mobile device. As responses are submitted, use Power BI reports to analyze them and make decisions.

The screenshot shows two main sections of the documentation:

- Create a survey**: Includes a "HOW-TO GUIDE" for creating surveys by adding questions and enhancing them with pictures.
- Send a survey**: Includes a "HOW-TO GUIDE" for sending surveys to recipients and collecting responses.
- Analyze responses and invitations**: Includes a "HOW-TO GUIDE" for getting real-time analytics from Power BI, including summary information and individual results for surveys.



The screenshot displays a grid of learning resources:

- Dynamics 365 Customer Voice**: A module titled "Create a survey project with Dynamics 365 Customer Voice".
 - 35 min duration
 - 5 (1) reviews
 - Functional Consultant, Beginner levels
- Customer Voice surveys**: A module titled "Automate Dynamics 365 Customer Voice surveys with Power Automate".
 - 53 min duration
 - Intermediate level
- Learning Path**: A learning path titled "Create surveys with Dynamics 365 Customer Voice".
 - 4 hr 18 min duration
 - Dynamics 365, Functional Consultant levels
- Embed surveys in your website**: A module titled "Embed surveys in your website with Dynamics 365 Customer Voice".
 - 42 min duration
 - Intermediate level

Documentation

- 5 Tracks
- 50+ pages

Learn Customer Voice

- 1 Learning Paths
- 6 Modules
- 2 Certifications

Power Platform Administration Resources



[View Administer Power Platform Documentation](#)

The screenshot shows the Microsoft Docs page for "Administer Power Platform". It includes a search bar, navigation links, and a main content area with sections like "Is this page helpful?", "In this article", and "Power Platform admin center capabilities". A sidebar on the left lists various Power Platform management topics.



[View Center of Excellence \(CoE\) Starter Kit Documentation](#)

The screenshot shows the Microsoft Docs page for the "Center of Excellence (CoE) Starter Kit". It includes a search bar, navigation links, and a main content area with sections like "Overview", "Admin", "Govern", and "Nurture". A sidebar on the left lists various CoE Starter Kit components.



[View Application lifecycle management \(ALM\) with Microsoft Power Platform Documentation](#)

The screenshot shows the Microsoft Docs page for "Application lifecycle management (ALM) with Microsoft Power Platform". It includes a search bar, navigation links, and a main content area with sections like "About ALM with Power Platform", "Understand and work with solutions", and "Implement healthy ALM". A sidebar on the left lists various ALM scenarios.

[Administer Power Platform Documentation](#)

- 20+ Sections
- 100's of pages

[Center of Excellence Starter Kit](#)

- Set up guidance
- What's included
- How to guidance

[ALM with Power Platform](#)

- 5 Sections
- 50+ pages
- Scenario-based