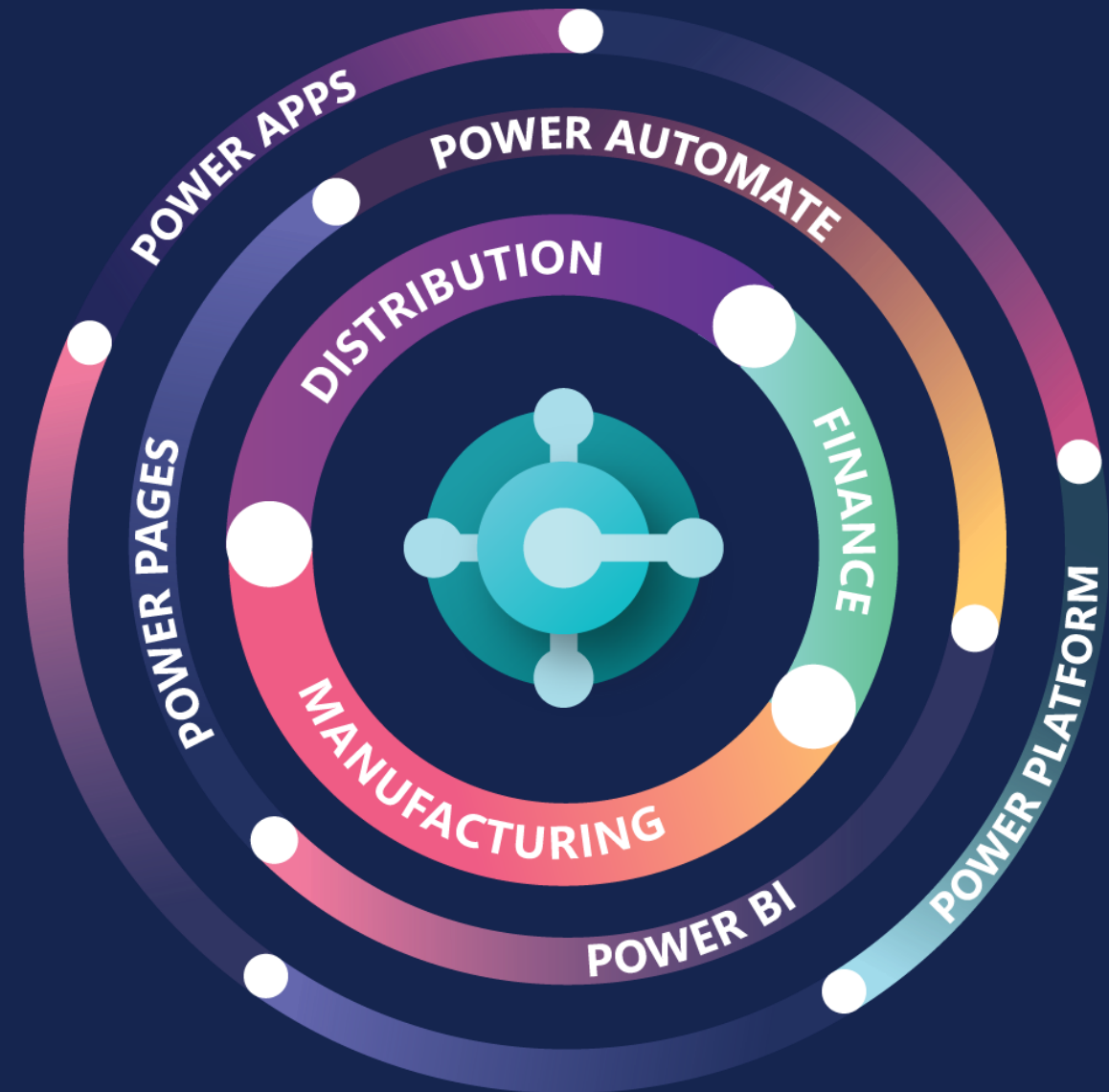


# BUSINESS CENTRAL connect

Don't need Power Apps?



15<sup>th</sup> & 16<sup>th</sup> OCTOBER 2024



Can you hear me?



Is everything clear?



~ 45 mins



Q & A



Hi!

**Stuart Starforth**

*Stuart.starforth@tecman.co.uk*

**Shaun Godber**

*Shaun.godber@tecman.co.uk*

# What we'll cover

1. Introduction
2. What are Power Apps?
3. Preview real-world examples
4. Power App logic & fundamentals
5. Q & A



# Introduction

- Off-system operational processes?
  - Paper based
  - Excel data records
  - Sign-off processes
  - Copy & Paste into emails?
  - Lever Arch folders (I still see these!)?

PowerApps





# Introduction to Power Apps

# What are Power Apps?

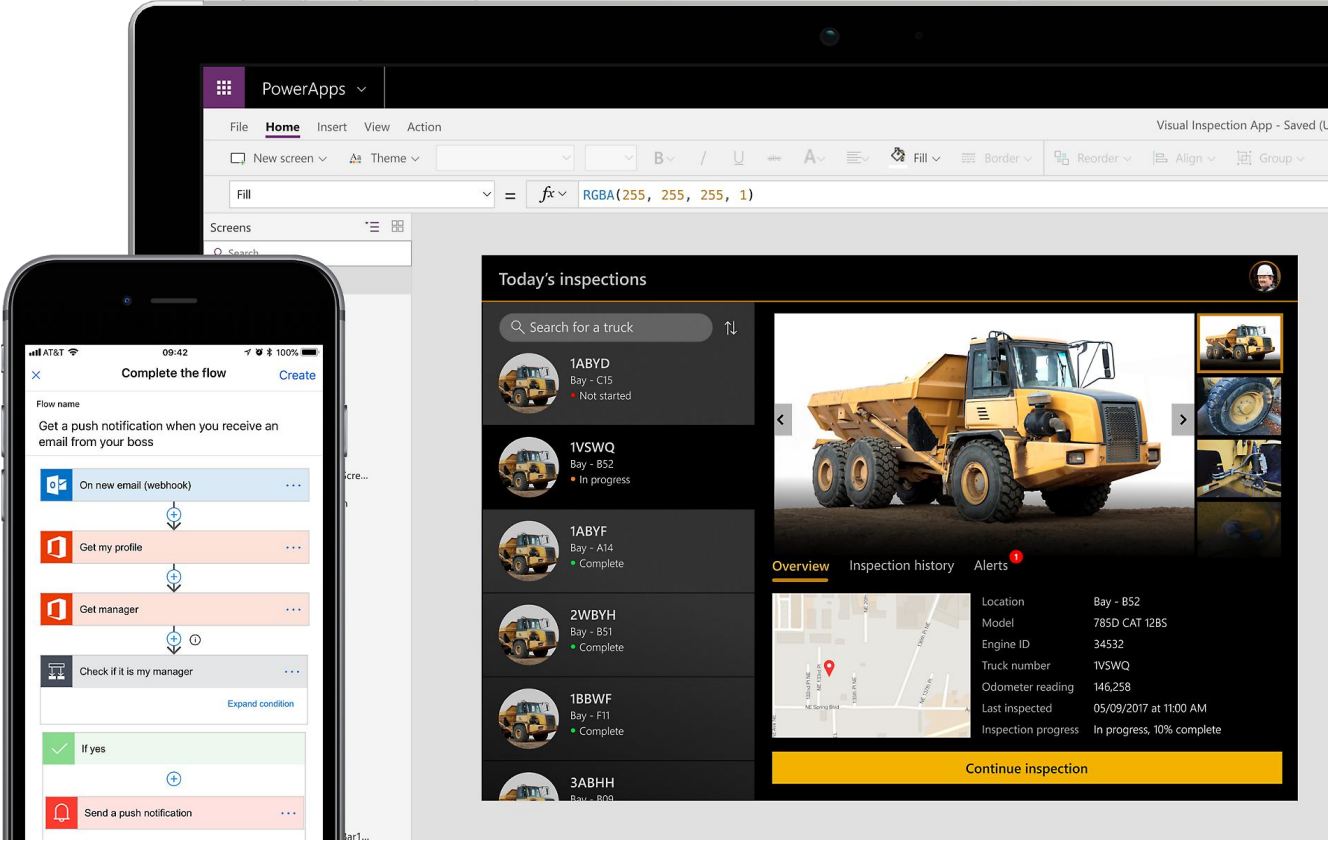
Power Apps is a suite of apps, services, connectors, and a data platform that provides a rapid application development environment.

PowerApps



# What is a Power App?

It allows users to build mobile and web apps with little or no code.





Power Apps | DragAndDropCalendar

Search

Back | Undo | Redo | Insert | Add data | Settings

Name = fx "Country"

Tree view

- App
  - Screen1
    - ScreenContainer1
      - LeftSideContainer1
        - Gallery1
          - DragAndDrop1
          - Subtitle1
          - Title1
          - Image1
          - Rectangle1
        - RightSideContainer1
          - DeliveryCalendar1

Spain 3/14/2023 11:14 PM

Switzerland 3/14/2023 11:14 PM

South Korea 3/14/2023 11:15 PM

Japan 3/14/2023 11:16 PM

Italy 3/14/2023 11:17 PM

India 3/14/2023 11:17 PM

France 3/14/2023 11:18 PM

Belgium 3/14/2023 11:18 PM

Australia 3/14/2023 11:18 PM

Austria 3/14/2023 11:19 PM

Romania 1/10/2023 1:56 PM

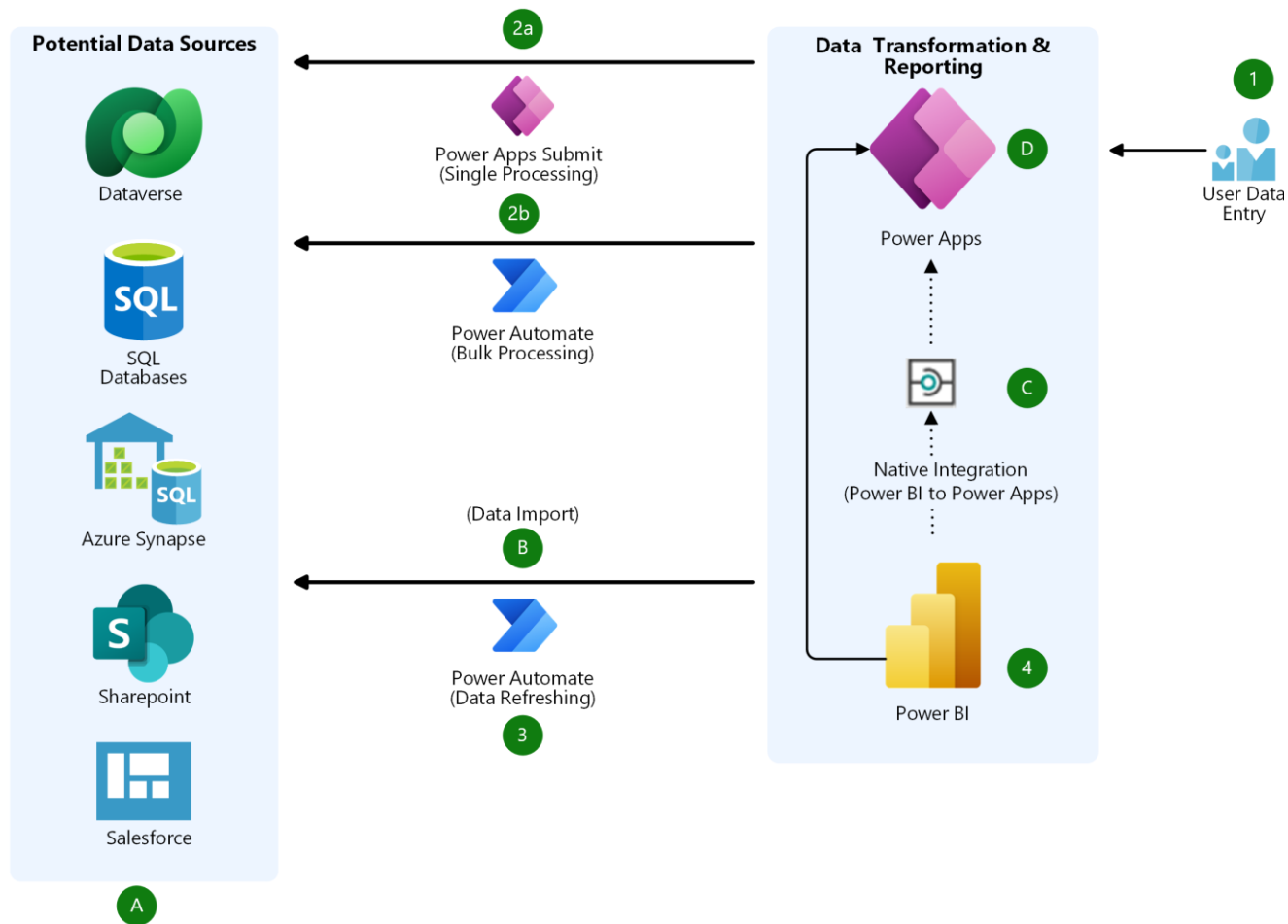
Germany 1/10/2023 1:55 PM

Today << >>

Sun	Mon	Tue
26	27	
05	06	
12	13	
19	20	Germany
26	27	

# Key Features

- Drag-and-drop interface



# Key Features

- Drag-and-drop interface
- Connects to multiple data sources



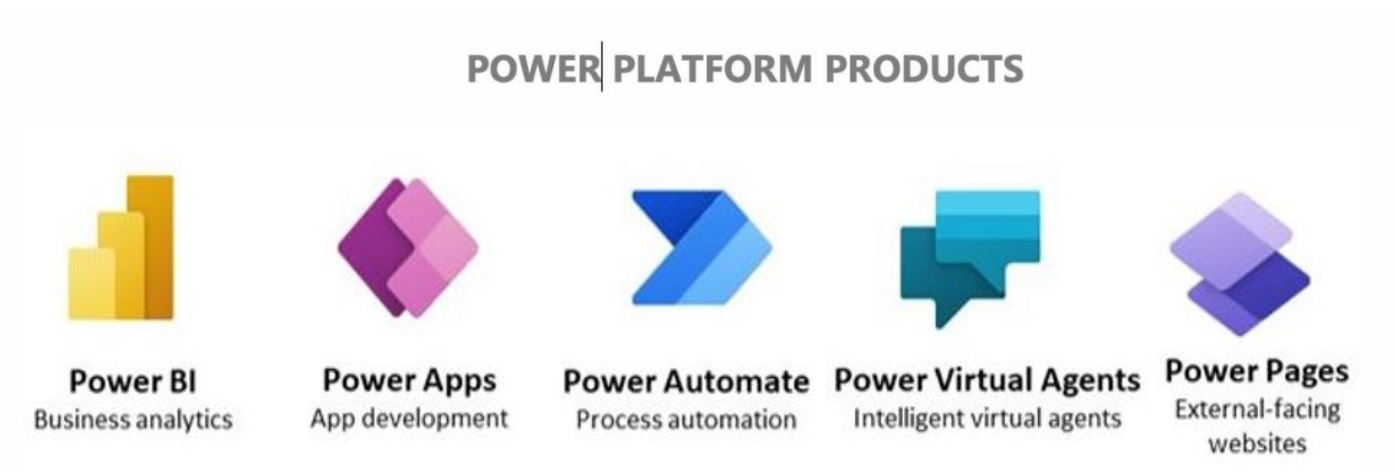
## Key Features

- Drag-and-drop interface
- Connects to multiple data sources
- Integrates with Microsoft Power Platform

# Power Platform Overview

The Power Platform consists of five services:

- Power BI
- Power Apps
- Power Automate
- Power Virtual Agents
- Power Pages

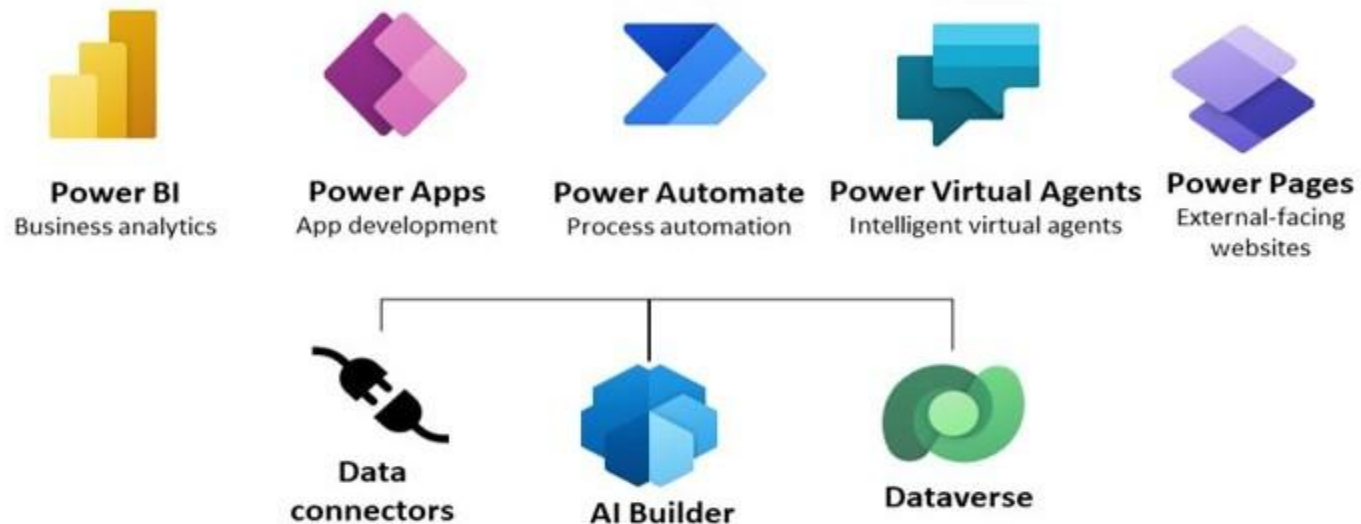


# Power Platform Overview

These work together to build apps, automate workflows, analyse data, and create chatbots.



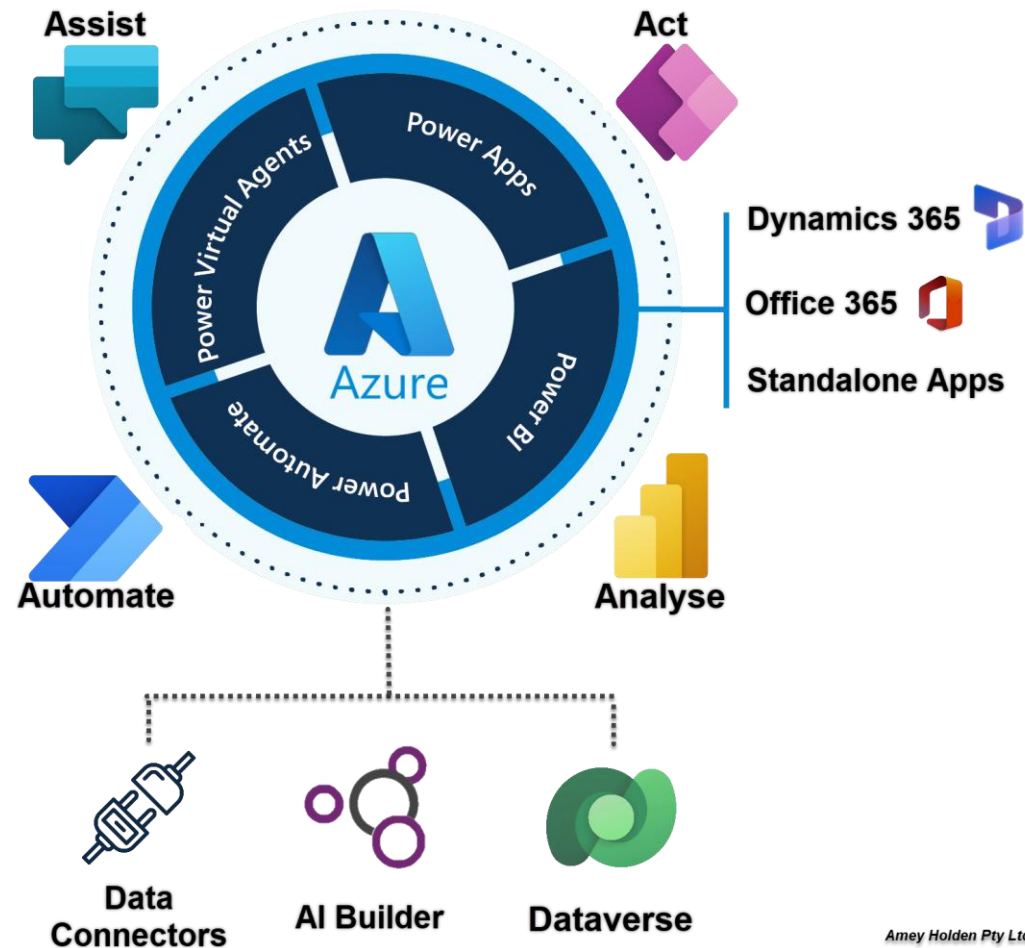
The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



# Power Apps Architecture

## Core Components:

- Data sources
- Power Apps Studio
- Microsoft Dataverse
- Connectors
- AI Builder



Amey Holden Pty Ltd



# Power App Preview

# Power App Preview

**Accounts**  [+ Quick Nav Button](#)

**Total Open Orders**  
3

**Total Order Value**  
£41,250

**Overview** [Filter](#) [+ New Order](#) [Grid](#)

Account Name	Primary Contact	Created On	Status	Annual Revenue	Main Phone	
Fourth Coffee (sample)	Yvonne McKay (sample)	22/05/2024	Active	£ 100,000.00	555-0150	→
Litware, Inc. (sample)	Susanna Stubberod (sa...	22/05/2024	Active	£ 20,000.00	555-0151	→
Adventure Works (samp...	Nancy Anderson (sample)	22/05/2024	Active	£ 60,000.00	555-0152	→
Fabrikam, Inc. (sample)	Maria Campbell (sample)	22/05/2024	Active	£ 80,000.00	555-0153	→
Blue Yonder Airlines (sa...	Sidney Higa (sample)	22/05/2024	Active	£ 10,000.00	555-0154	→
City Power & Light (sam...	Scott Konersmann (sam...	22/05/2024	Active	£ 100,000.00	555-0155	→
Contoso Pharmaceutica...	Robert Lyon (sample)	22/05/2024	Active	£ 60,000.00	555-0156	→
Alpine Ski House (samp...	Paul Cannon (sample)	22/05/2024	Active	£ 90,000.00	555-0157	→
A. Datum Corporation (...)	Rene Valdes (sample)	22/05/2024	Active	£ 10,000.00	555-0158	→



# Power App Preview

**Sales Overview App** was designed to allow mobile quick access to Dataverse records.

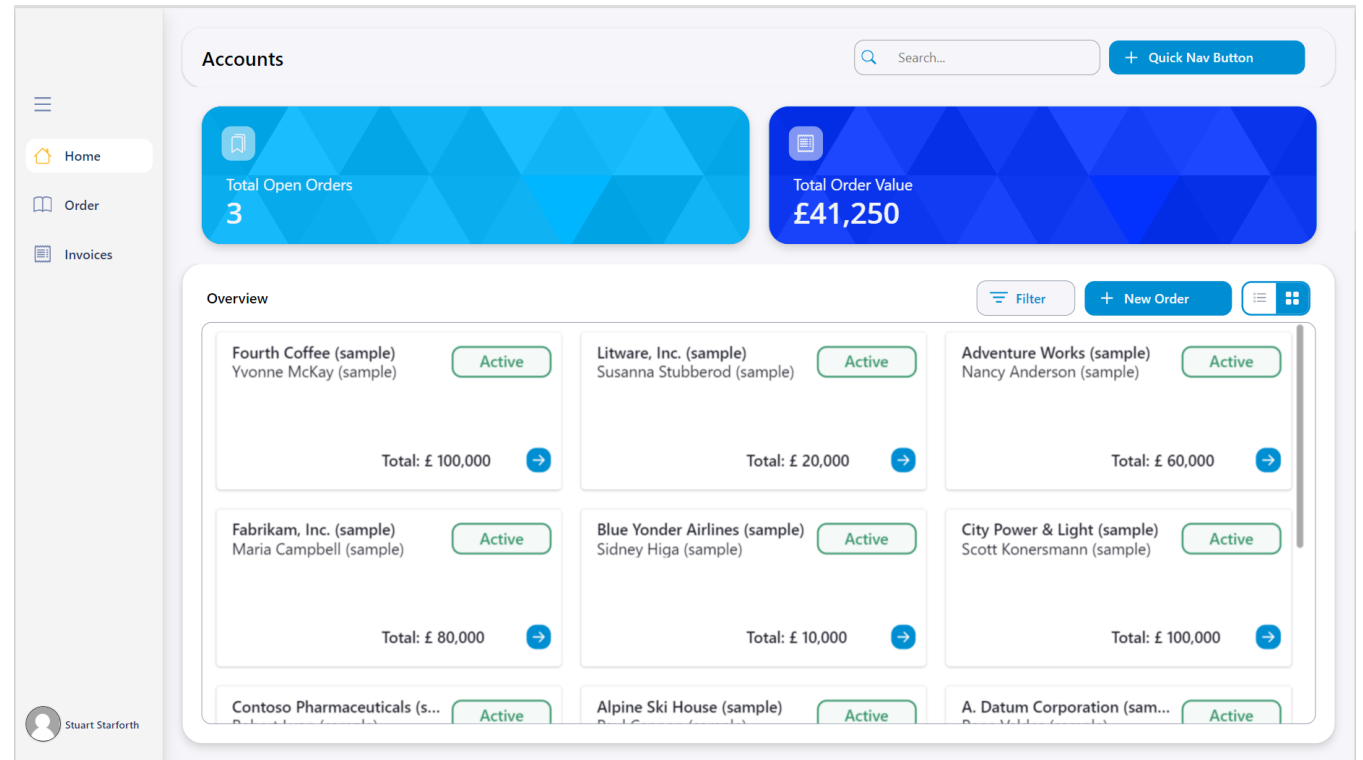
The screenshot displays a mobile application interface for managing accounts. At the top, there is a search bar and a '+ Quick Nav Button'. Below this, two summary cards are shown: 'Total Open Orders: 3' and 'Total Order Value: £41,250'. The main section is titled 'Overview' and contains a table of account records. The table has columns for Account Name, Primary Contact, Created On, Status, Annual Revenue, and Main Phone. All accounts listed are 'Active'.

Account Name	Primary Contact	Created On	Status	Annual Revenue	Main Phone
Fourth Coffee (sample)	Yvonne McKay (sample)	22/05/2024	Active	£ 100,000.00	555-0150
Litware, Inc. (sample)	Susanna Stubberod (sa...	22/05/2024	Active	£ 20,000.00	555-0151
Adventure Works (samp...	Nancy Anderson (sample)	22/05/2024	Active	£ 60,000.00	555-0152
Fabrikam, Inc. (sample)	Maria Campbell (sample)	22/05/2024	Active	£ 80,000.00	555-0153
Blue Yonder Airlines (sa...	Sidney Higa (sample)	22/05/2024	Active	£ 10,000.00	555-0154
City Power & Light (sam...	Scott Konersmann (sam...	22/05/2024	Active	£ 100,000.00	555-0155
Contoso Pharmaceutica...	Robert Lyon (sample)	22/05/2024	Active	£ 60,000.00	555-0156
Alpine Ski House (samp...	Paul Cannon (sample)	22/05/2024	Active	£ 90,000.00	555-0157
A. Datum Corporation (...	Rene Valdes (sample)	22/05/2024	Active	£ 10,000.00	555-0158

# Power App Preview

The app has:

- Responsive layout
- Modern design/look
- Flexible modular component library
- Container structured
- And more...



# Power App Preview

Responsive app:

- Easily switch between pages and see different data
- Expanding the menu to show more information
- Search and quick navigation buttons

The screenshot displays a mobile application interface for 'Orders'. At the top, there is a search bar and a 'Quick Nav Button'. Below this are three summary cards: 'Active Orders' (2), 'Total Orders' (4), and 'Total Orders Value' (£ 41,250.00). The main section is an 'Overview' table with columns for Order ID, Name, Created On, Status, Date Fulfilled, Total Tax, and Total Amount. The table contains four rows of data, with status indicators (Active, Fulfilled, Canceled) and navigation arrows.

Order ID	Name	Created On	Status	Date Fulfilled	Total Tax	Total Amount
ORD-01002-F7G1S3	FoundationApp - CS ...	04/06/2024	Active		£ 20.00	£ 650.00
ORD-01003-C2W6T3	Order for - Foundatio...	06/06/2024	Active		£ 2,400.00	£ 38,400.00
ORD-01000-H3H8Z5	Test 1	22/05/2024	Fulfilled	03/06/2024	£ .00	£ 2,200.00
ORD-01001-M8T1M2	Test 2	23/05/2024	Canceled		£ .00	£ .00



# Where to Place Logic: Canvas Apps, Model-Driven Apps, Dataverse, or Power Automate Flows?

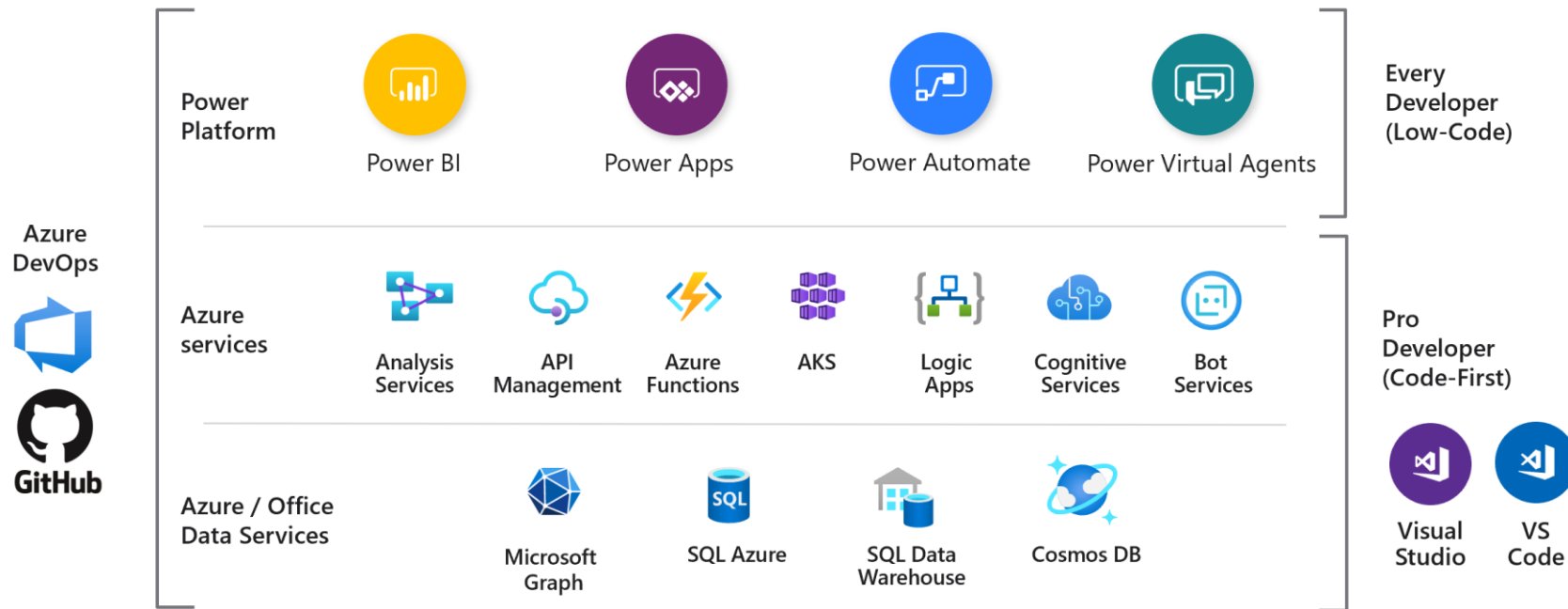
# Where to Place Logic?

When building Power Apps, you need to consider where to place business logic to optimize performance and functionality.



# Where to Place Logic?

Logic can be implemented in various parts of the system based on the complexity and the intended behaviour of the app.



# Considerations

## Simple

If the logic is simple and needs to run instantly on the user's device, **Canvas Apps** might be the best option.

## Complex

For complex workflows involving multiple data sources or connectors, using **Power Automate** flows can offload processing from the client device to the cloud.

# Considerations

## Universal Logic

If the logic needs to apply universally across multiple apps or enforce data integrity, using **Microsoft Dataverse** is ideal because it runs server-side and is independent of specific apps.

## Complex Business Processes

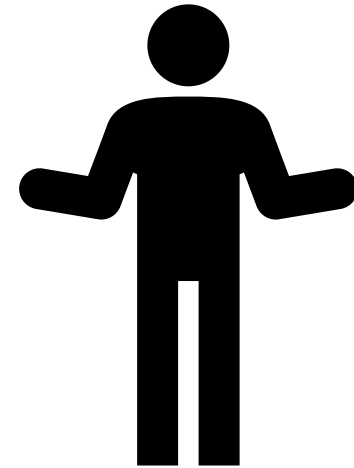
**Model-driven apps** are best when you need to enforce complex business processes, business rules, or actions within a structured data-centric environment.



# Quick Tour of Terms

## Key Terminology:

- Power Automate (Flow): Automates workflows
- Triggers: Start actions in Power Automate
- Actions: The steps after a trigger occurs
- Microsoft Dataverse: Data platform for apps



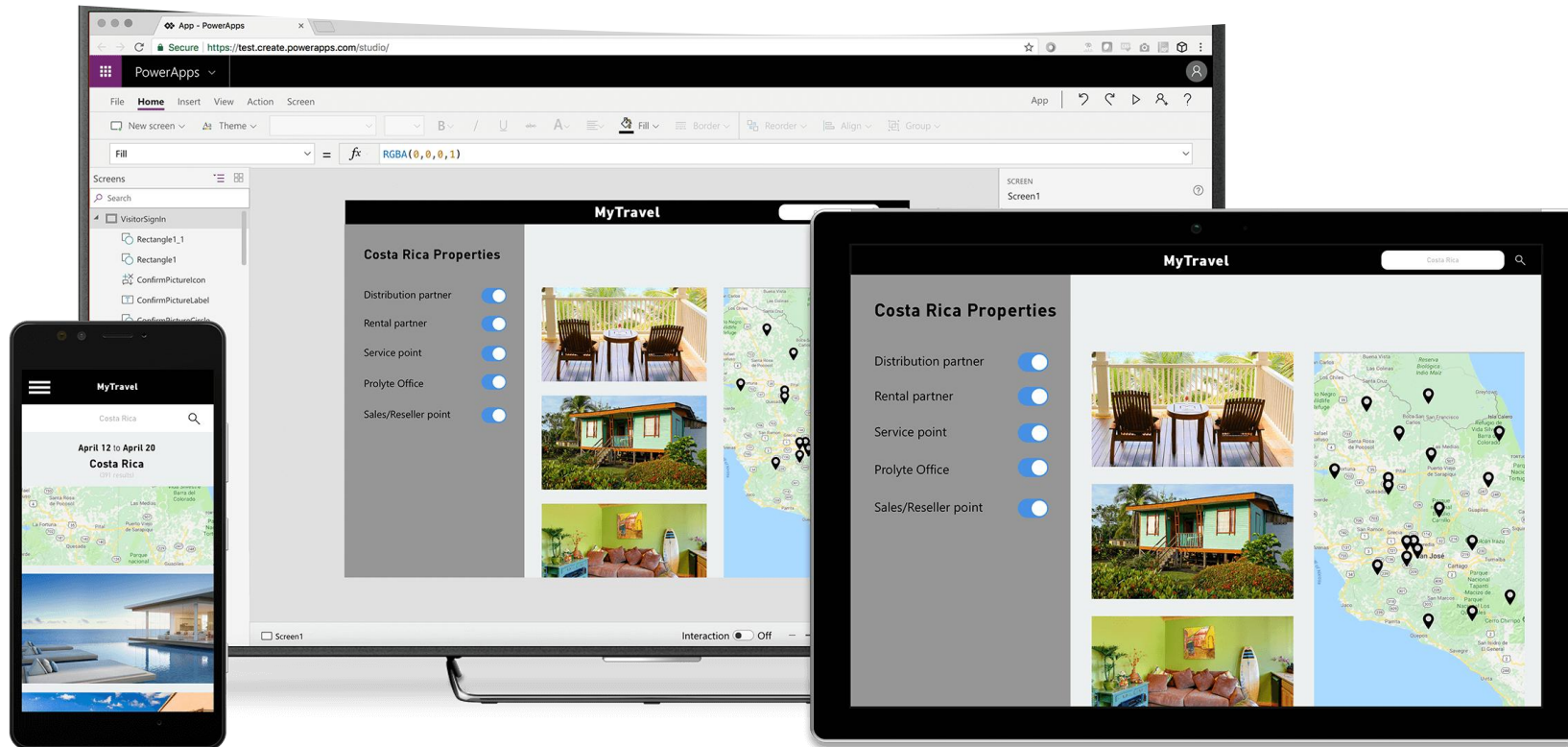


# Power Apps: Canvas Apps

# What is a Canvas App?

A **Canvas App** in Power Apps allows you to design and build apps from a blank canvas by dragging and dropping elements onto the screen.

You have full control over the user interface and can create custom layouts for desktop or mobile. It's ideal for simple, user-driven applications that focus on visual design and flexibility.



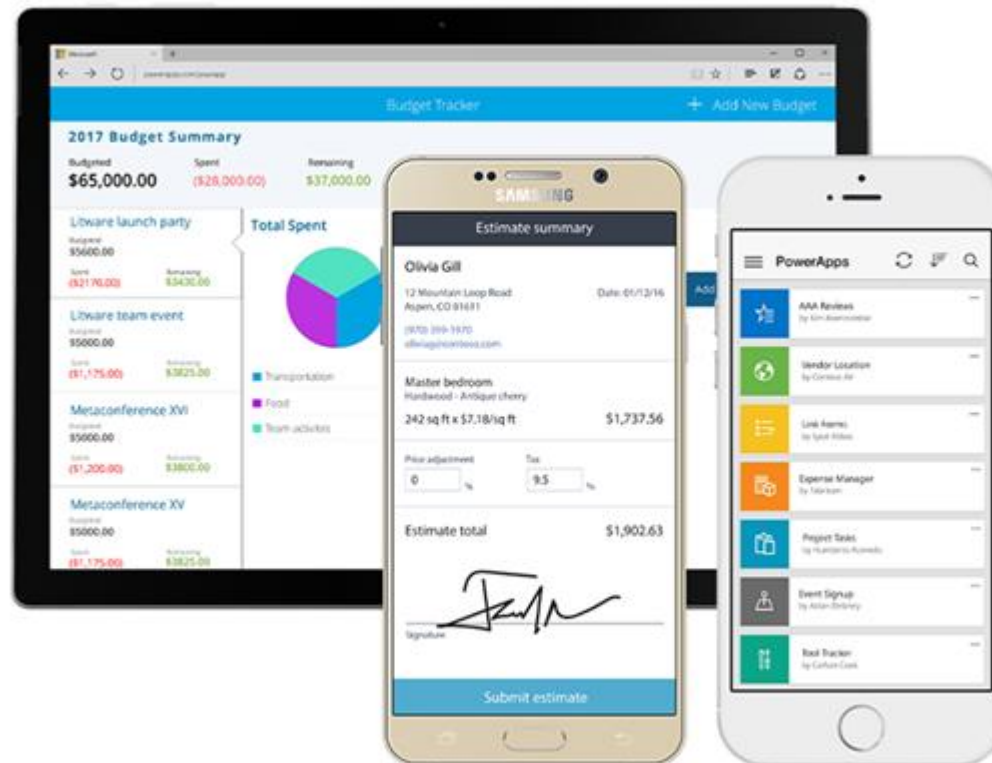
# Canvas Apps

Canvas apps use formulas, similar to Excel for building logic. These formulas run client-side on the user's device.

Use canvas apps for scenarios where:

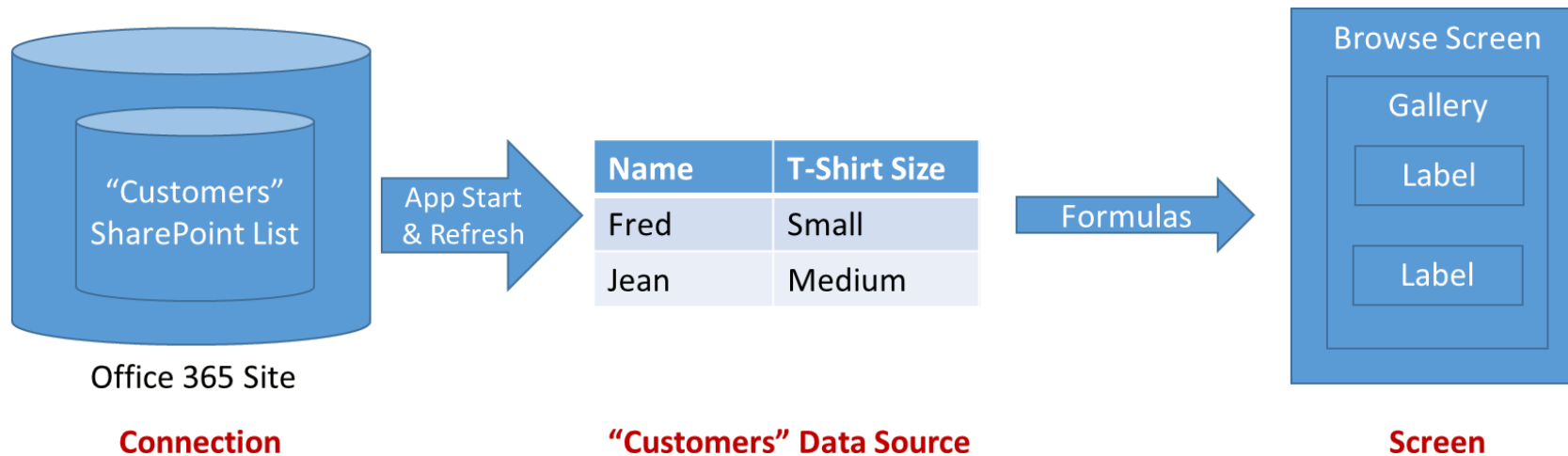
# Canvas Apps

- Immediate feedback is needed (e.g., updating a screen based on user input).



# Canvas Apps

- The logic is relatively simple and doesn't involve manipulating large datasets or complex calculations.



# Canvas Apps

- Best practices include keeping logic simple and avoiding intensive operations like manipulating large data sets with "ForAll()".





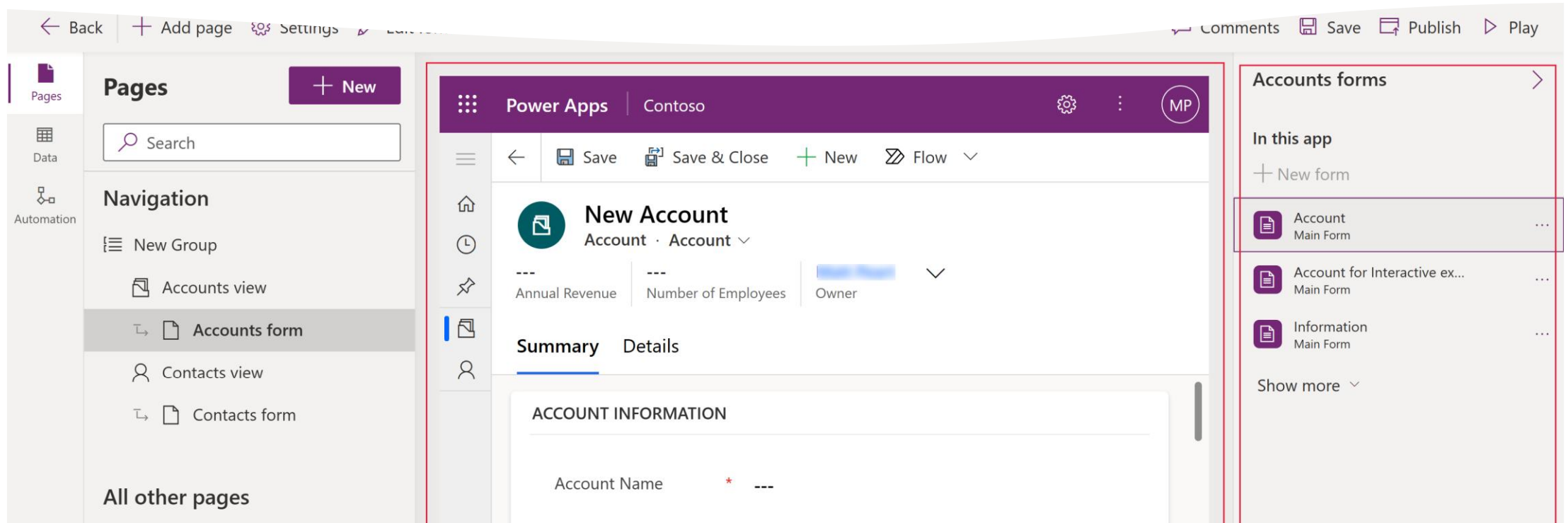
# Power Apps: Model-Driven Apps



# What is a Model-Driven App?

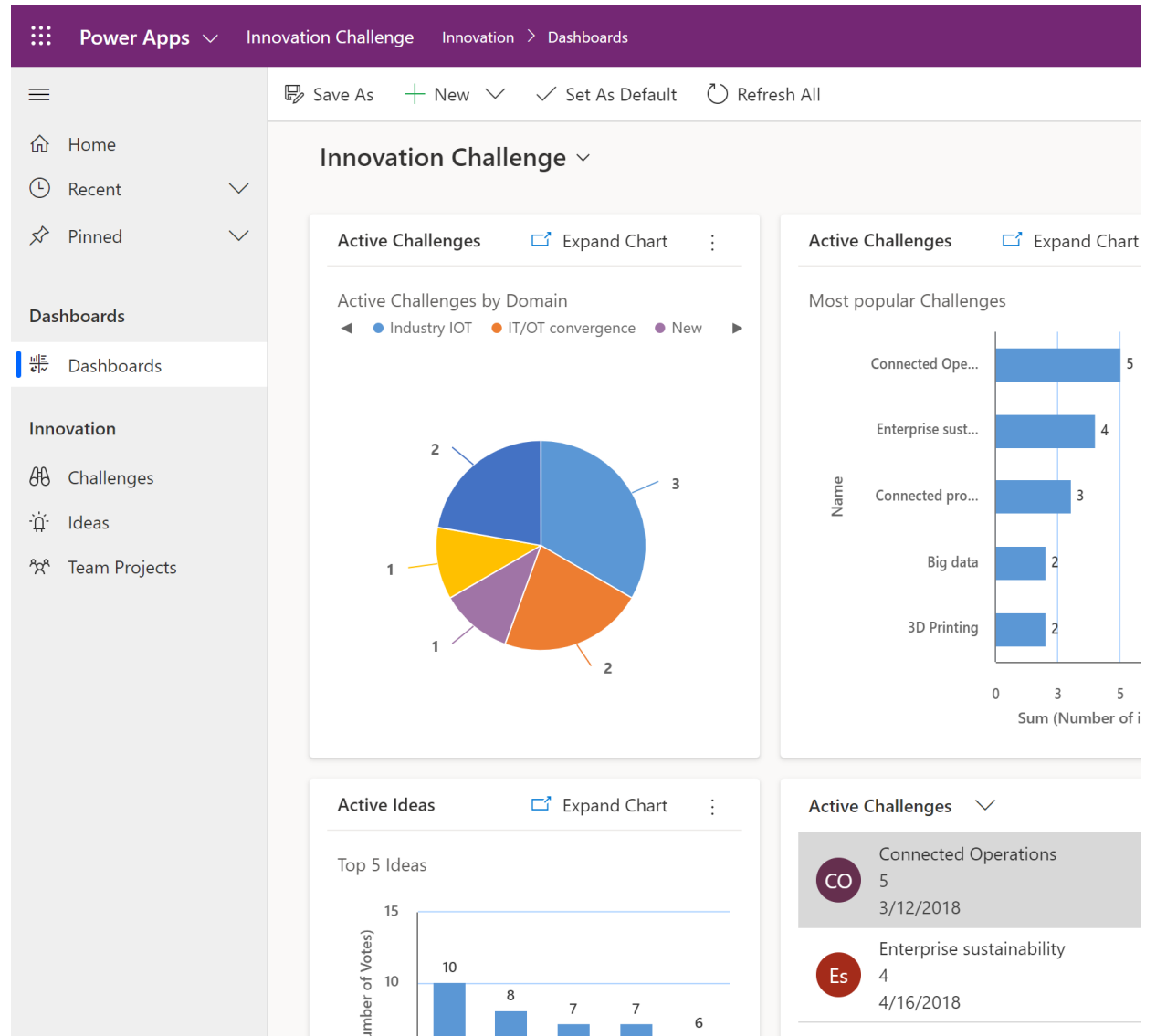
A **Model-Driven App** is built based on your data model in Microsoft Dataverse. Instead of focusing on the layout, you design the app around the relationships between the data entities, and the app generates the UI automatically.

It's best for complex business applications where you need consistent, structured processes.



# Model-Driven Apps

Model-driven apps offer multiple low-code tools for applying logic:



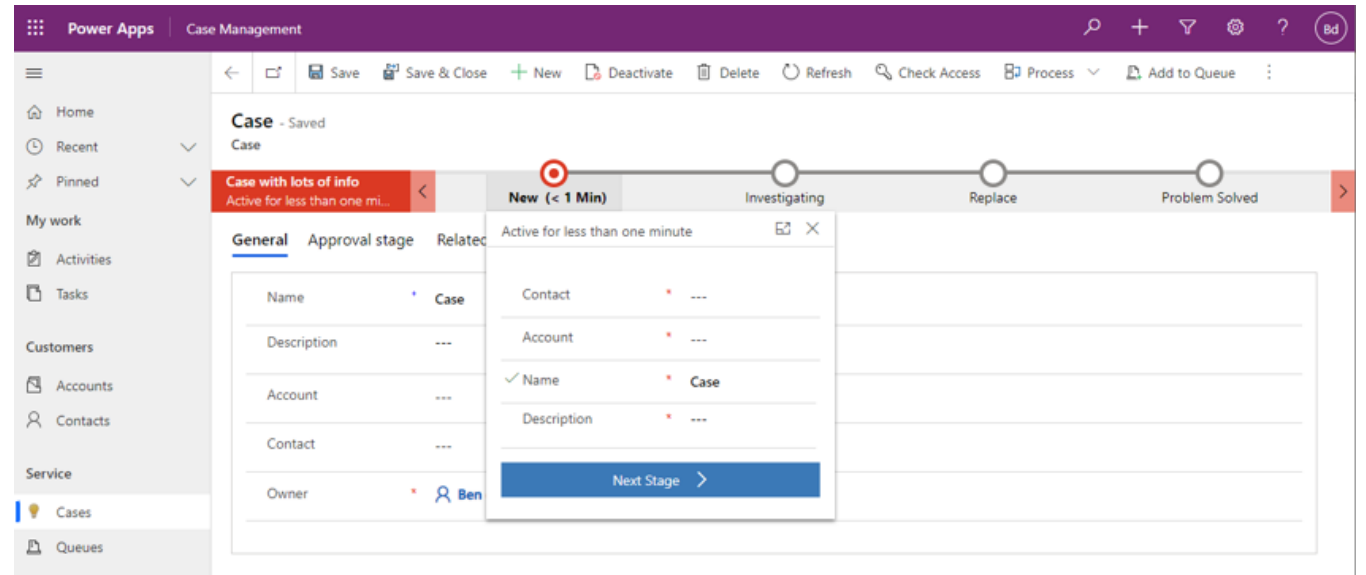
# Model-Driven Apps

**Business Rules:** Ensure consistency by enforcing rules across different forms and tables.

The screenshot displays the Microsoft Dynamics 365 Business Rules editor. The main workspace shows a visual rule definition with a condition box and two action boxes. The right-hand pane is set to the 'Properties' view for 'Rule 1'. The 'Field' property is highlighted with a red box and set to 'Account Name'. The 'Operator' is set to 'Equals'. Below the main workspace, a 'Business Rule (Text View)' pane shows the logic: 'IF Account Name equals "Jones" THEN'.

# Model-Driven Apps

**Business Process Flows:**  
Guide users through multi-step processes within an app.



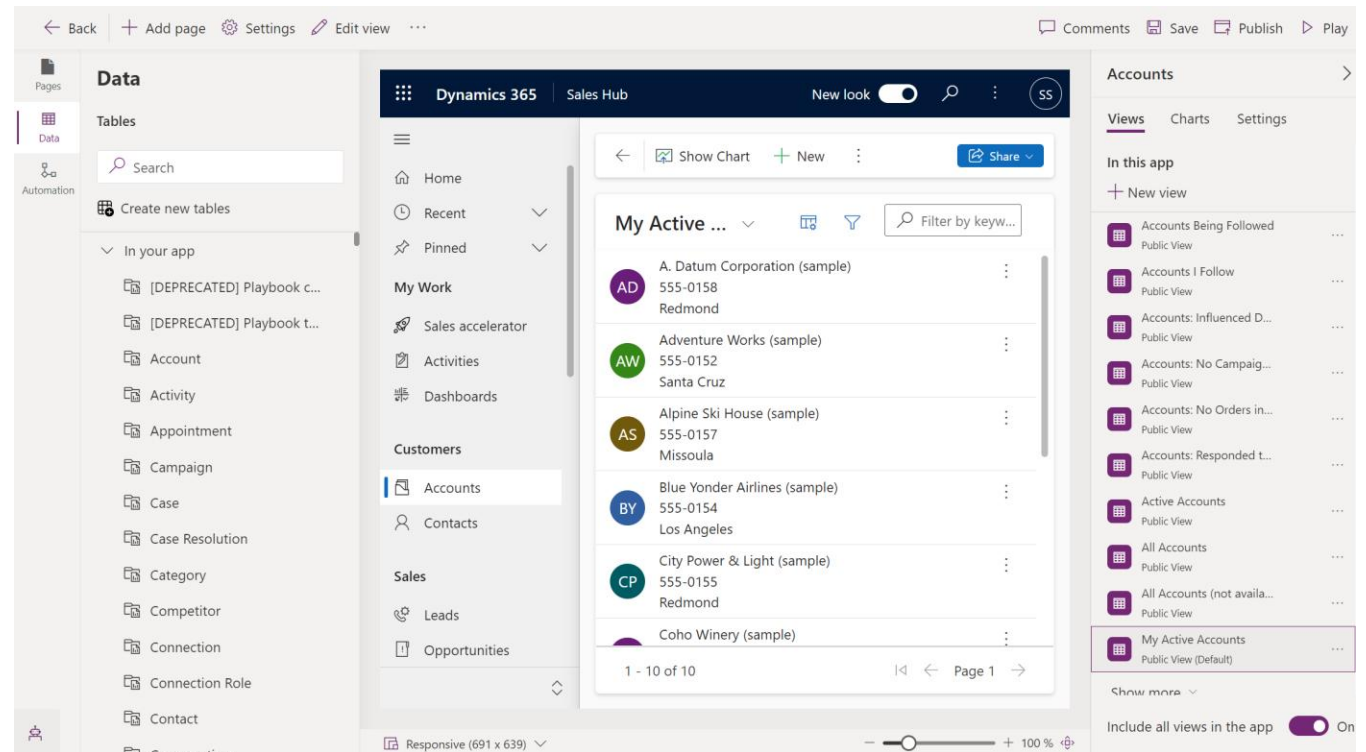
# Model-Driven Apps

**Workflows and Actions:**  
Allow for automation of repetitive tasks, like approvals or notifications.

The screenshot shows the configuration page for a workflow named 'Example Workflow'. The interface includes a top navigation bar with options like 'File', 'Save and Close', 'Activate', and 'Convert to a real-time workflow'. A yellow banner at the top suggests using Microsoft Flow instead of background workflows. The main area is divided into 'General', 'Administration', and 'Notes' tabs. Under 'General', there are sections for 'Hide Process Properties', 'Available to Run', and 'Workflow Job Retention'. The 'Available to Run' section has several checked options: 'Run this workflow in the background (recommended)', 'As an on-demand process', and 'As a child process'. The 'Workflow Job Retention' section has 'Automatically delete completed workflow jobs (to save disk space)' checked. On the right, there are fields for 'Entity' (Social Media Account), 'Category' (Workflow), 'Scope' (Organization), and 'Start when' (Record is created, Record fields change). A 'Select' button is next to 'Record fields change'. At the bottom, there is a step configuration area with a dropdown for 'Follower Count' and a condition 'If Social Media Account:Followers > [1,000], then:'. Below the condition, there are two tasks: 'Add task' and 'Email'. The 'Add task' task has a 'Create' dropdown set to 'Task' and a 'Set Properties' button. The 'Email' task has a 'Send email' dropdown set to 'Create New Message' and a 'Set Properties' button. The status at the bottom left is 'Draft'.

# Model-Driven Apps

These apps are well-suited for complex scenarios, requiring multiple entities or when logic should apply across different areas of the app.





# Power Apps: Power Automate

Power Automate

Start Button -> Update Account Customer Types • Draft

### List rows - Accounts

Parameters Settings Code view Testing About

Table Name \*  
Accounts

Select Columns  
accountid\_tecman\_customertype\_value

Filter Rows  
\_tecman\_customertype\_value eq null

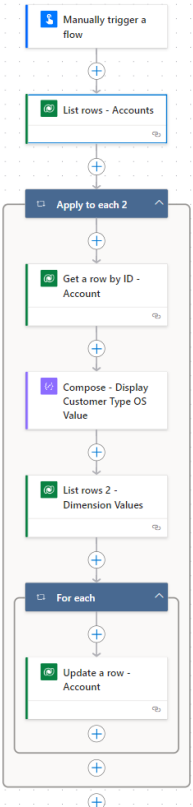
Sort By  
Columns to sort by in OData orderBy style (excluding lookups)

Fetch Xml Query  
Enter a Fetch XML query for advanced customization

Row Count  
Enter the number of rows to be listed (default = 5000)

Advanced parameters  
Showing 0 of 3 Show all Clear all

Connected to tecmancrm@jacarandacarpets.com. [Change connection reference](#)



```
graph TD; A[Manually trigger a flow] --> B[List rows - Accounts]; B --> C[Apply to each 2]; C --> D[Get a row by ID - Account]; D --> E[Compose - Display Customer Type OS Value]; E --> F[List rows 2 - Dimension Values]; F --> G[For each]; G --> H[Update a row - Account];
```

# What is Power Automate?

**Power Automate** is a service that allows you to automate workflows between different applications and services.



# What is Power Automate?

You can create flows that trigger actions based on conditions, perform tasks across multiple apps, or streamline approvals.

## Condition

Parameters Settings Code view About

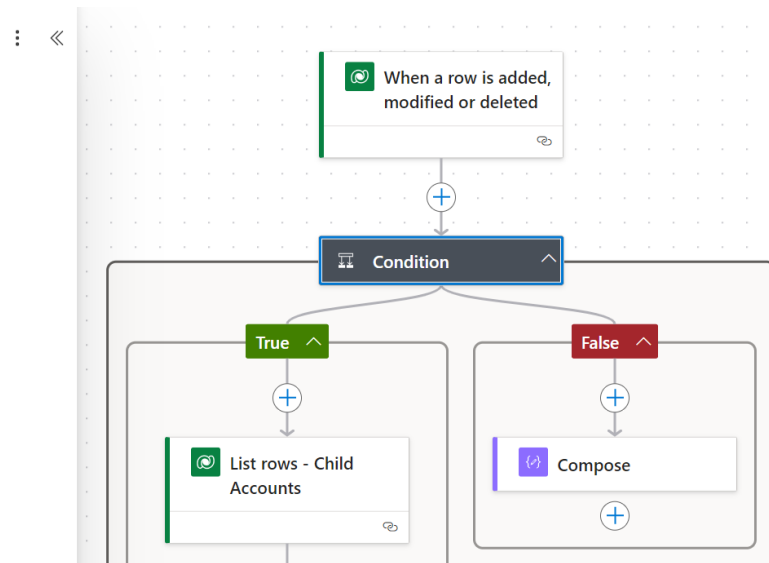
Condition Expression \*

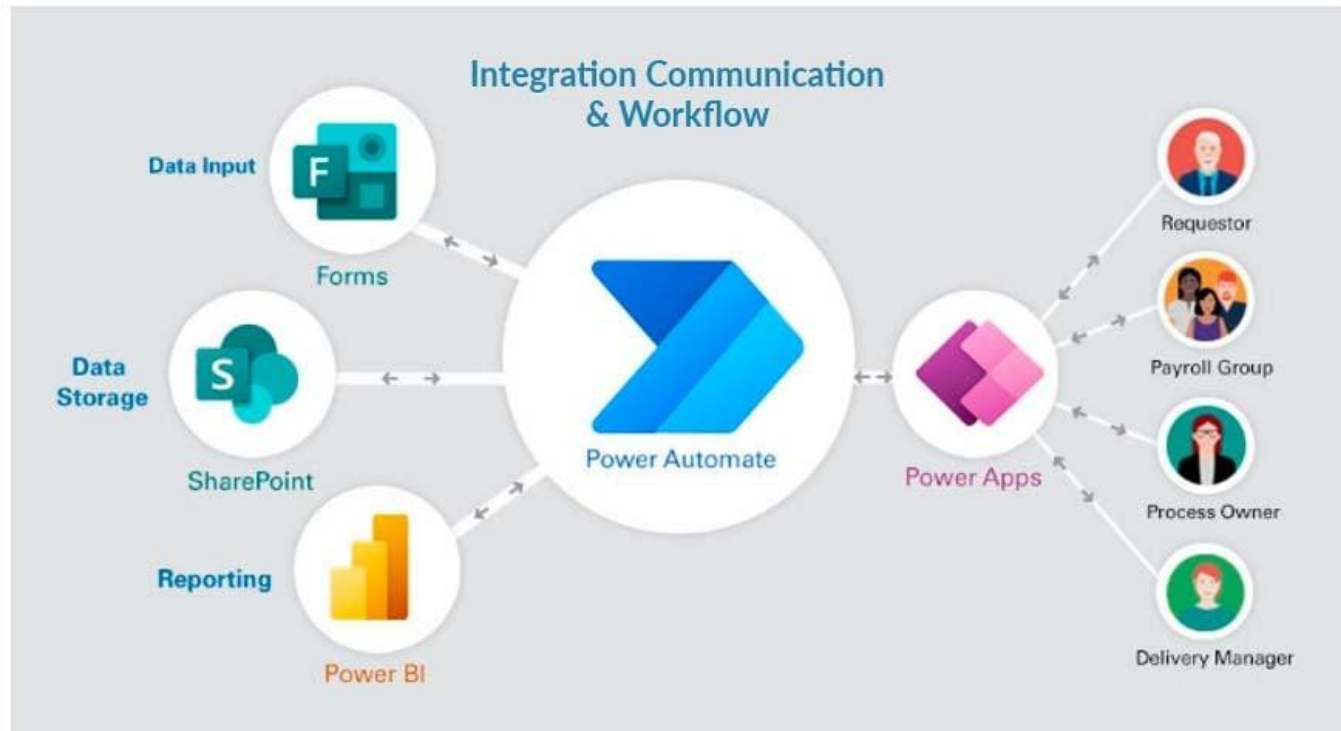
Provide the values to compare and select the operator to use.

AND ▾

**c9\_accounttype** is equal to ▾ 794540000 ...

+ New item ▾





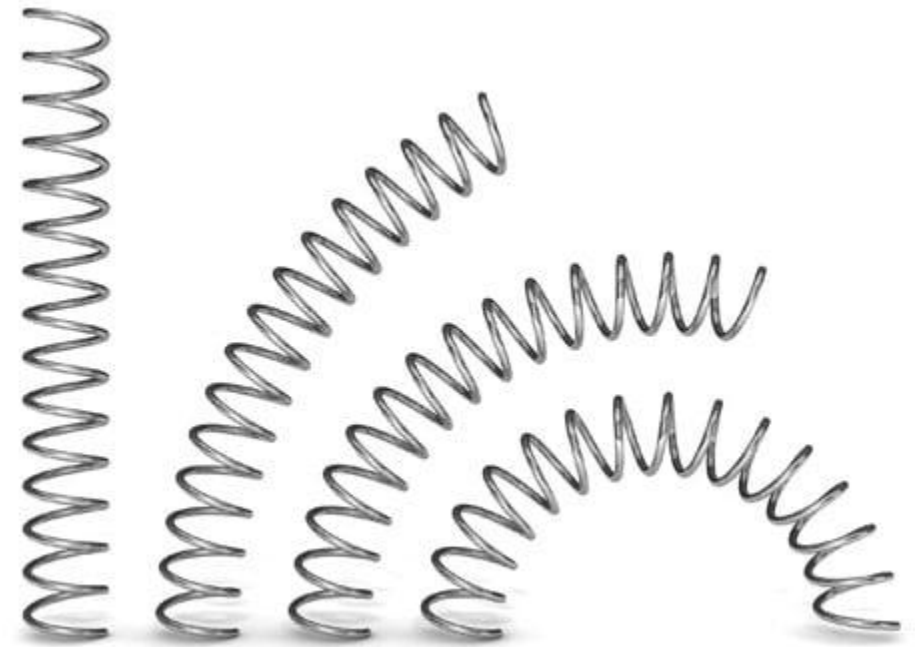
# What is Power Automate?

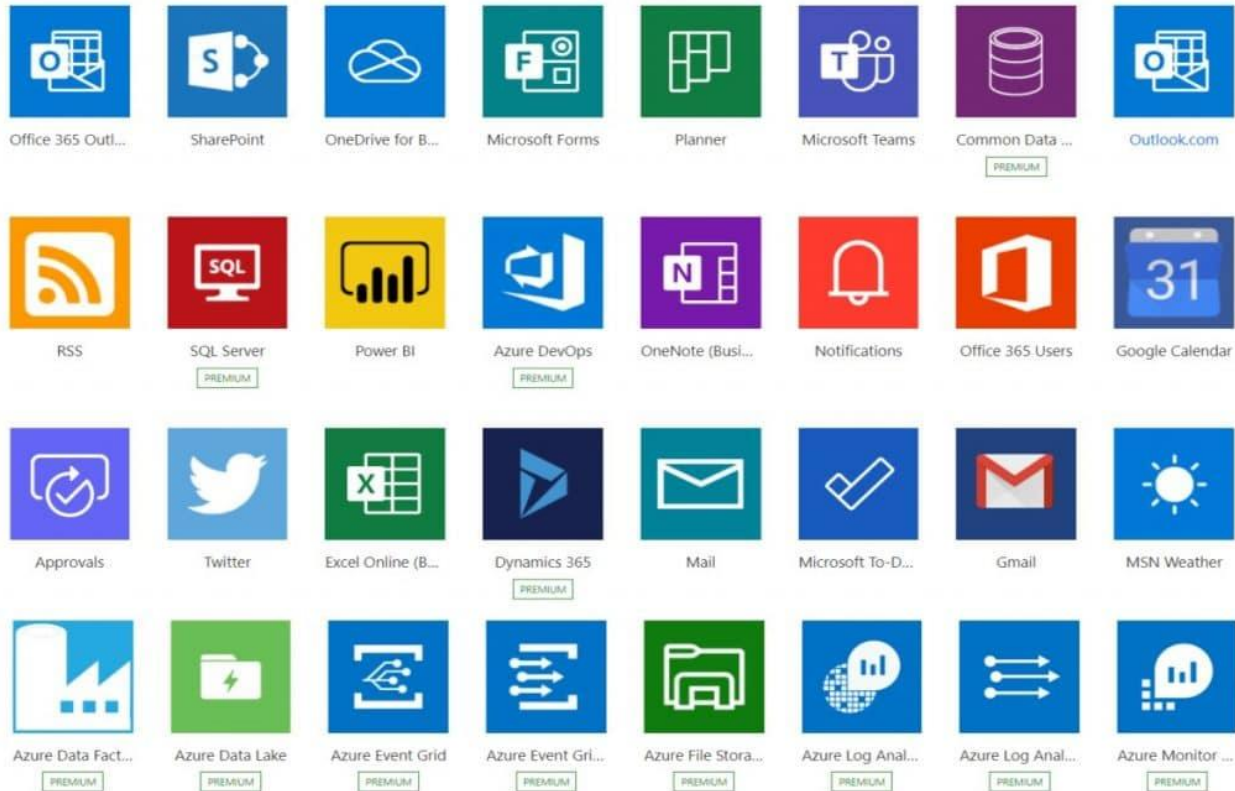
It is useful for integrating and automating repetitive tasks without manual intervention.

# Power Automate Flows

Power Automate provides flexibility for automating processes across services and connectors.

Use Power Automate flows when:

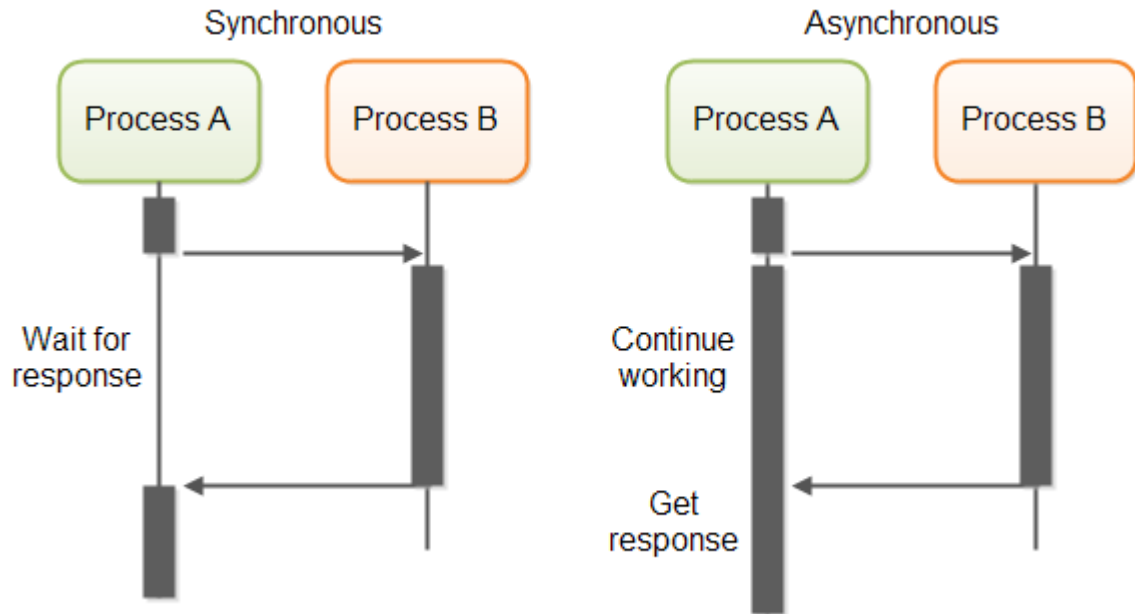




# Power Automate Flows

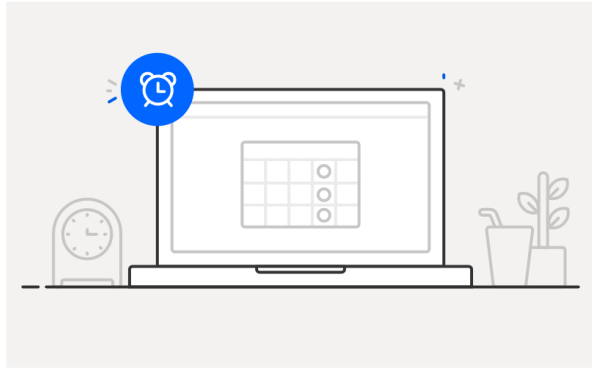
Logic needs to span multiple services (e.g., integrating SharePoint with Dataverse).

# Power Automate Flows



You need to perform asynchronous operations or don't want to burden the client device with processing.

## Build a scheduled cloud flow



Stay on top of what's important without the effort—you choose when and how often the flow runs.

### Examples:

- Automate team reminders to submit expense reports
- Auto-backup data to designated storage on a regular basis

Flow name

Add a name or we'll generate one

Run this flow \*

Starting 1/12/23 \* at 10:00 AM 

Repeat every 1 \* Minute 

This flow will run:

Every minute

Skip

Create

Cancel

# Power Automate Flows

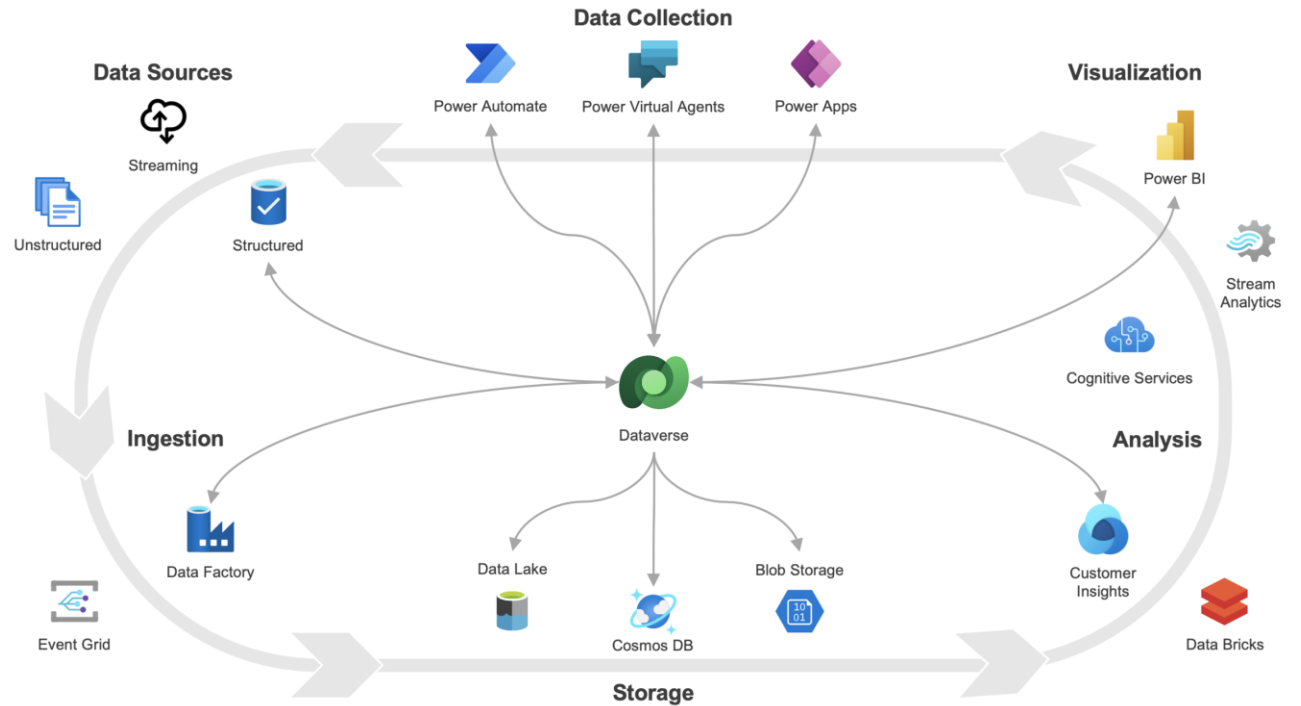
Creating **approval flows**, triggering actions across different services, or automating tasks on a schedule.



# Power Apps: Microsoft Dataverse

# What is Microsoft Dataverse?

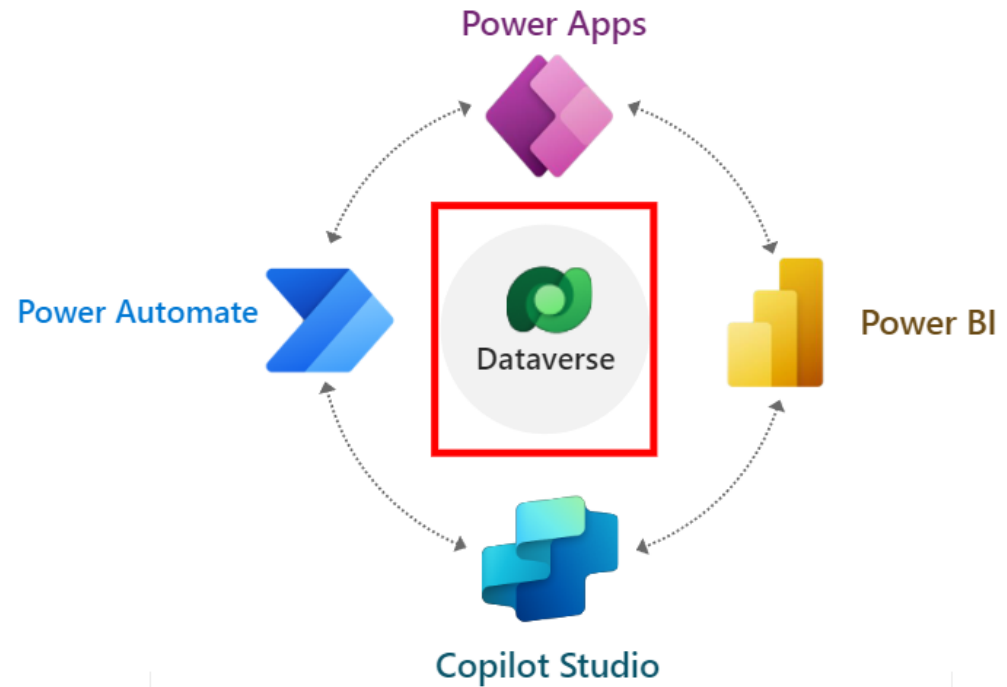
**Microsoft Dataverse** is a secure data platform that stores and manages data used by business applications.





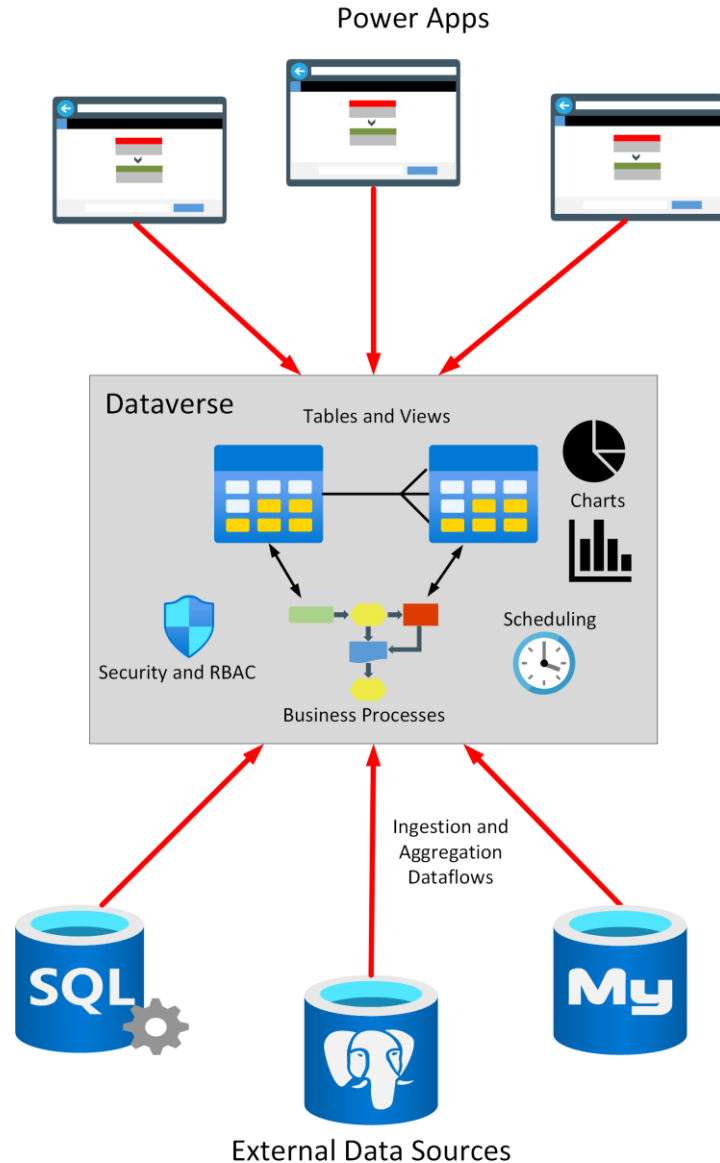
# What is Microsoft Dataverse?

It acts as a unified data model that apps, including Power Apps, can connect to, enabling consistent business logic and data sharing.



# What is Microsoft Dataverse?

It supports the creation of calculated fields, workflows, and complex data relationships across different apps.



# Microsoft Dataverse

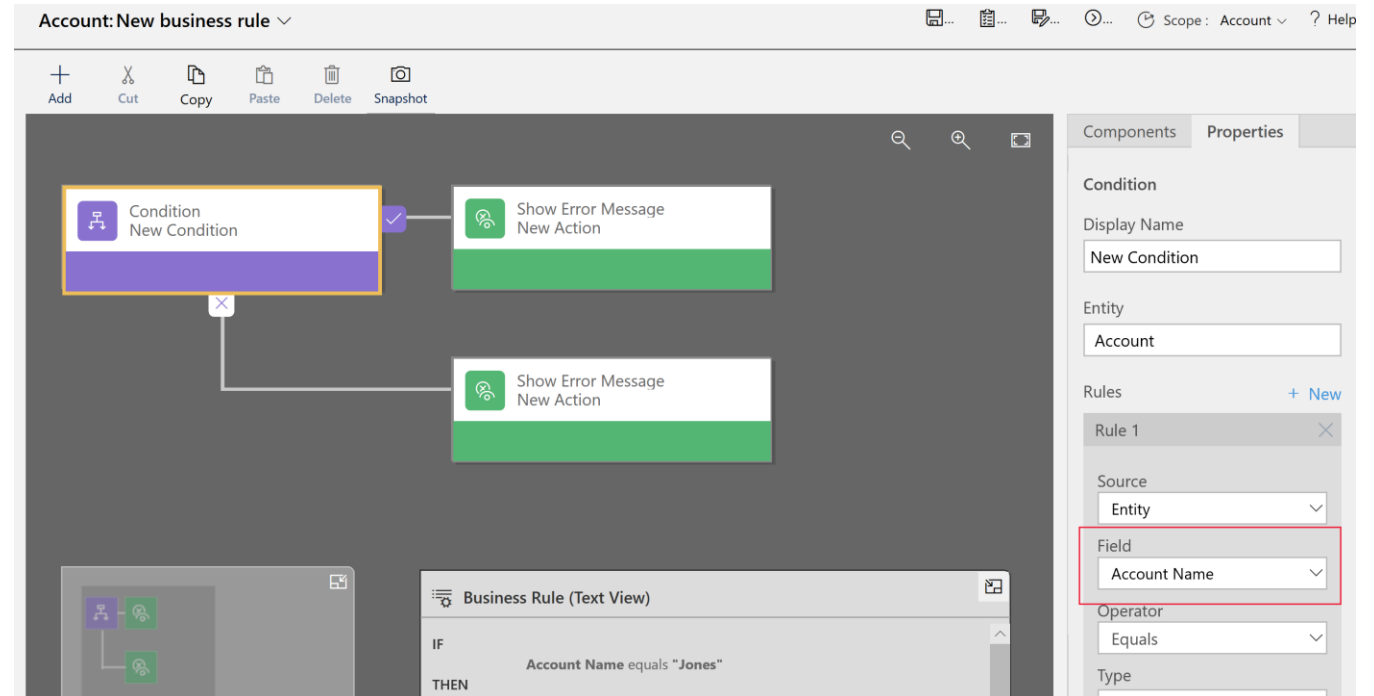
Dataverse is ideal for storing and managing business logic at the server level.

It ensures that logic is applied consistently across all apps and services.

You can implement:

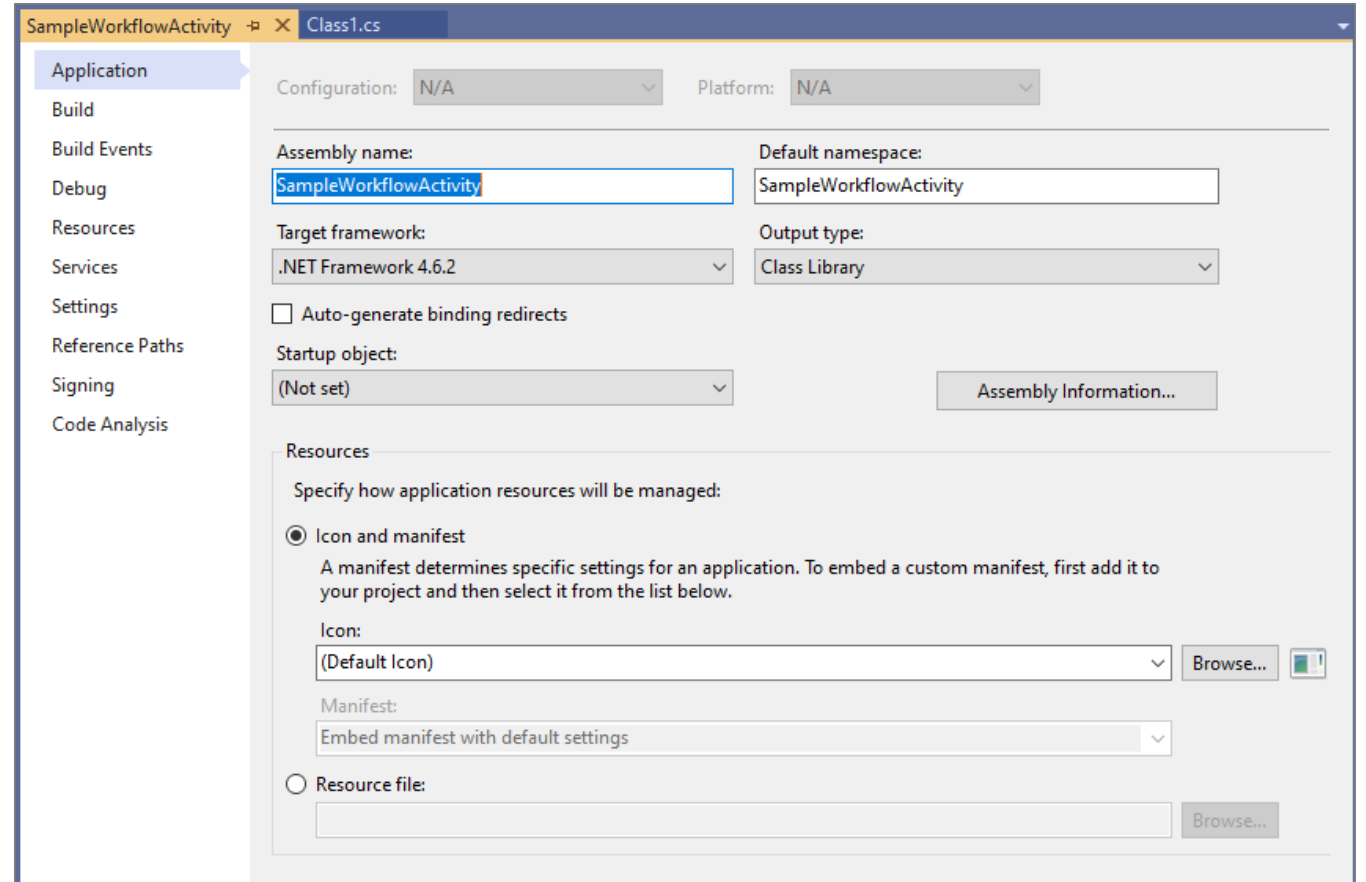
# Microsoft Dataverse

**Business Rules:** To enforce conditions, validations, and calculations at the database level.



# Microsoft Dataverse

**Plug-ins and Workflow Extensions:** For pro-developers to implement custom code that handles more complex server-side logic.



# Microsoft Dataverse

**Calculated and Roll-up Fields:** For automatic calculations and aggregations within Dataverse tables.

**AD** A. Datum Corporation (sample)  
Account · Account ▾

Summary Details Files Related

Fax	---
Website	http://www.adatum.ci
Parent Account	---
Ticker Symbol	---
Open Revenue	US\$0
Last updated:	1/23/2020 1:06 PM
	<a href="#">Recalculate</a>

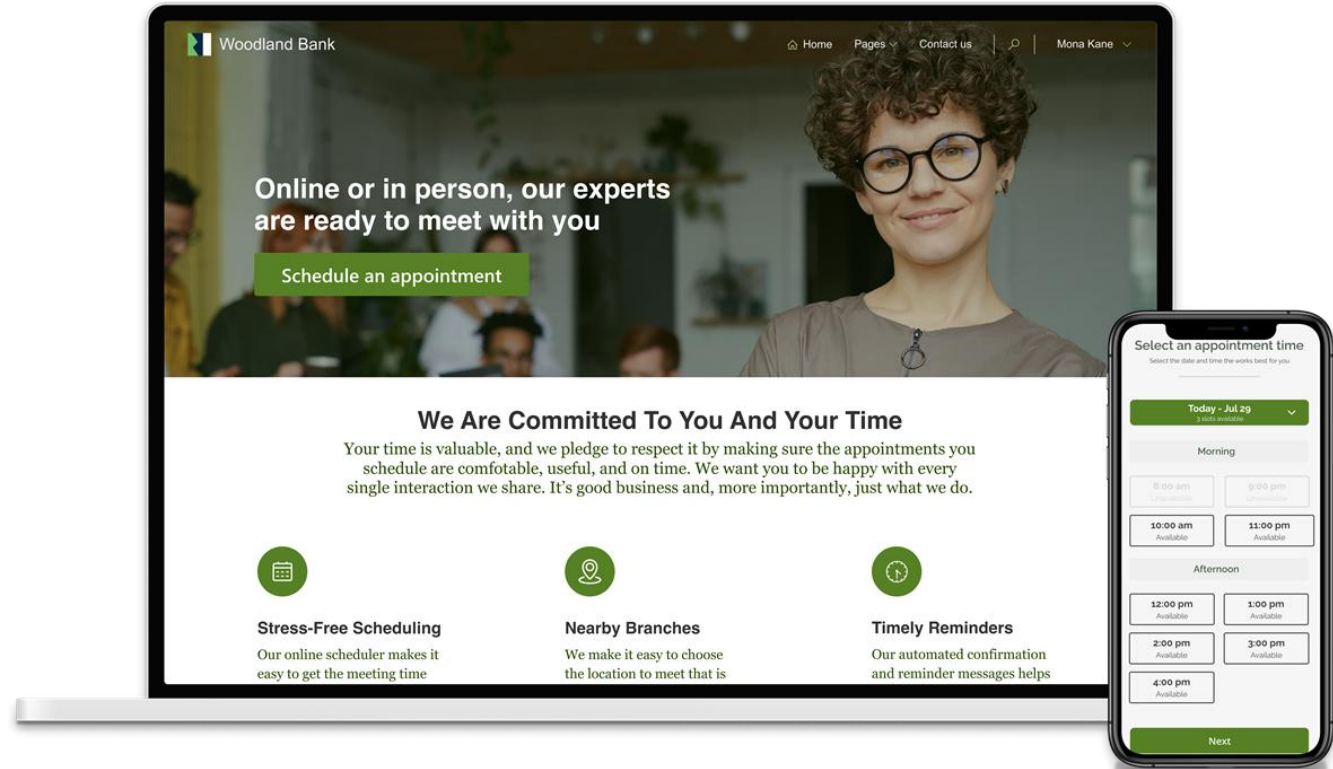
ADDRESS

New posts (1)

- Auto-post Opportuni
- Task comp Evaluation Confirm th
- Phone Cal guidelines
- Task modi Agree to a Document
- Phone Cal Likes some



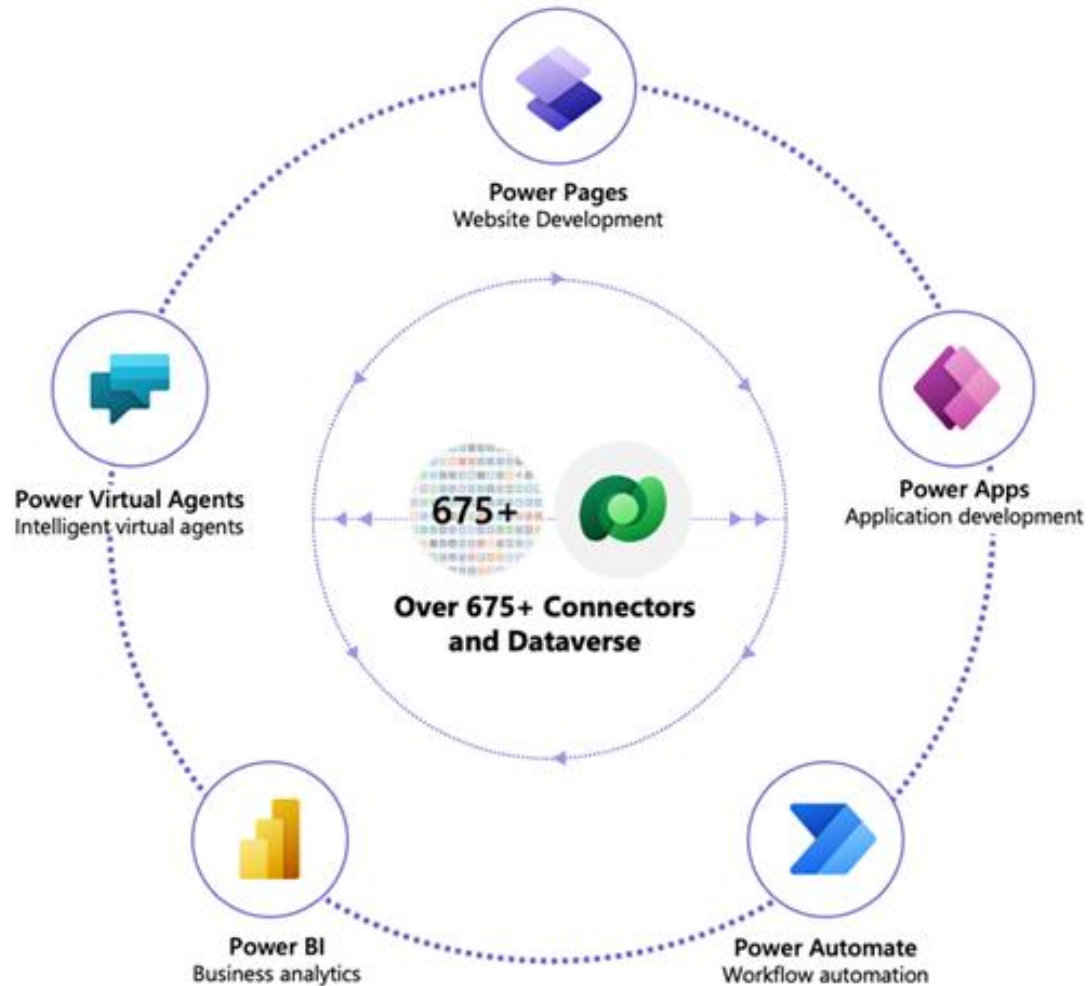
# Power Apps: Power Pages



# What is Power Pages?

**Power Pages** is a low-code development and hosting platform that allows users to build secure, data-driven websites with ease.



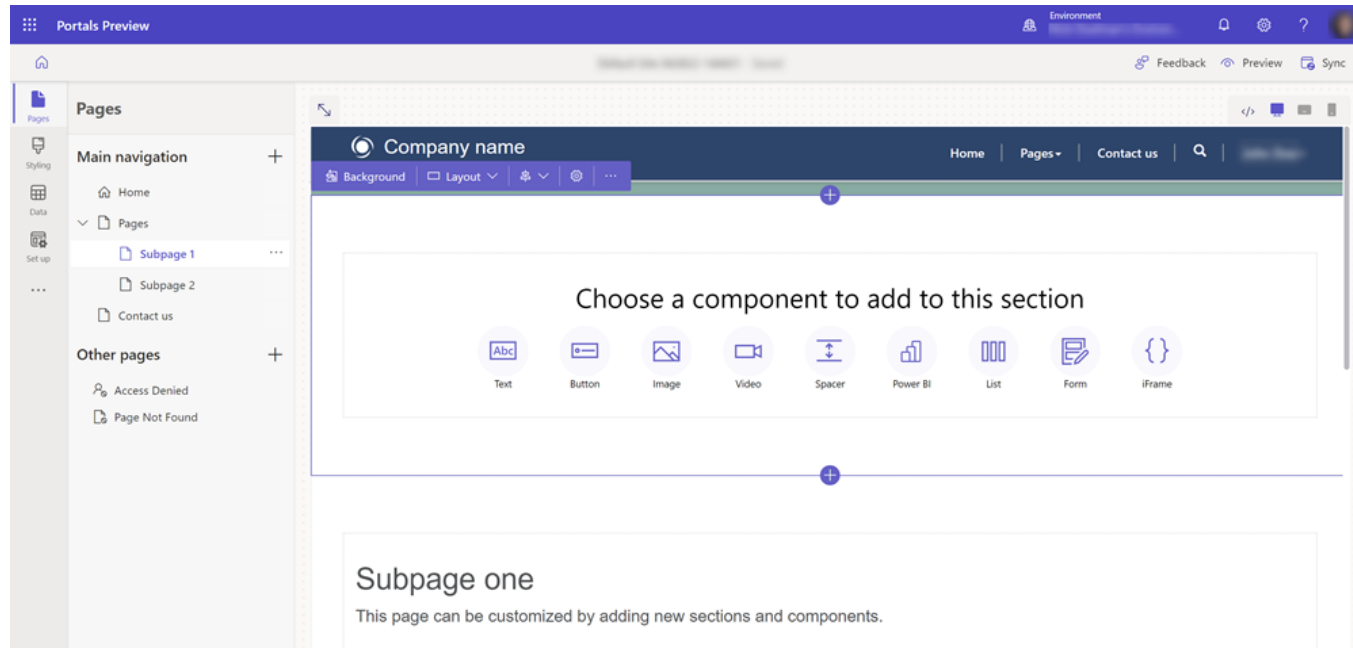


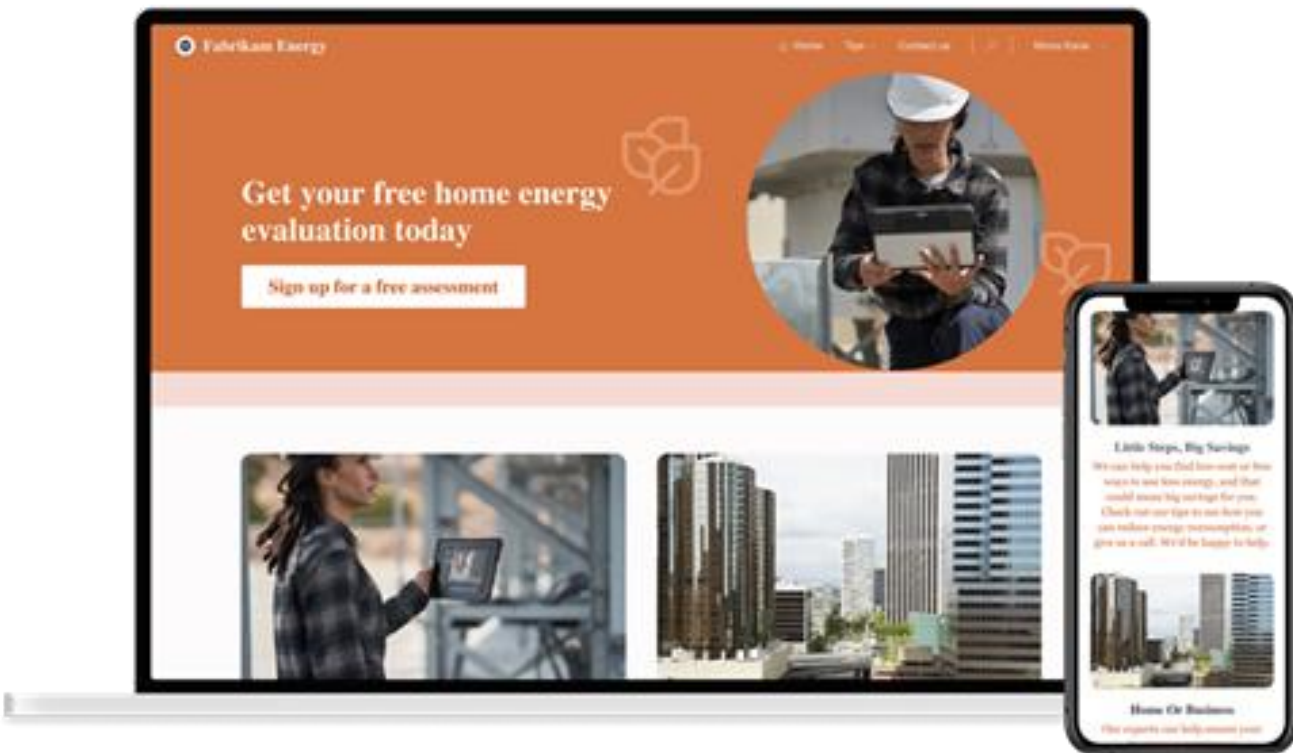
# What is Power Pages?

It is part of the Microsoft Power Platform and enables users to design web pages that can integrate directly with Microsoft Dataverse and other external services, making it ideal for business scenarios requiring external-facing websites.

# What is Power Pages?

**Power Pages** provides rich, customizable templates, a fluid visual experience through the design studio



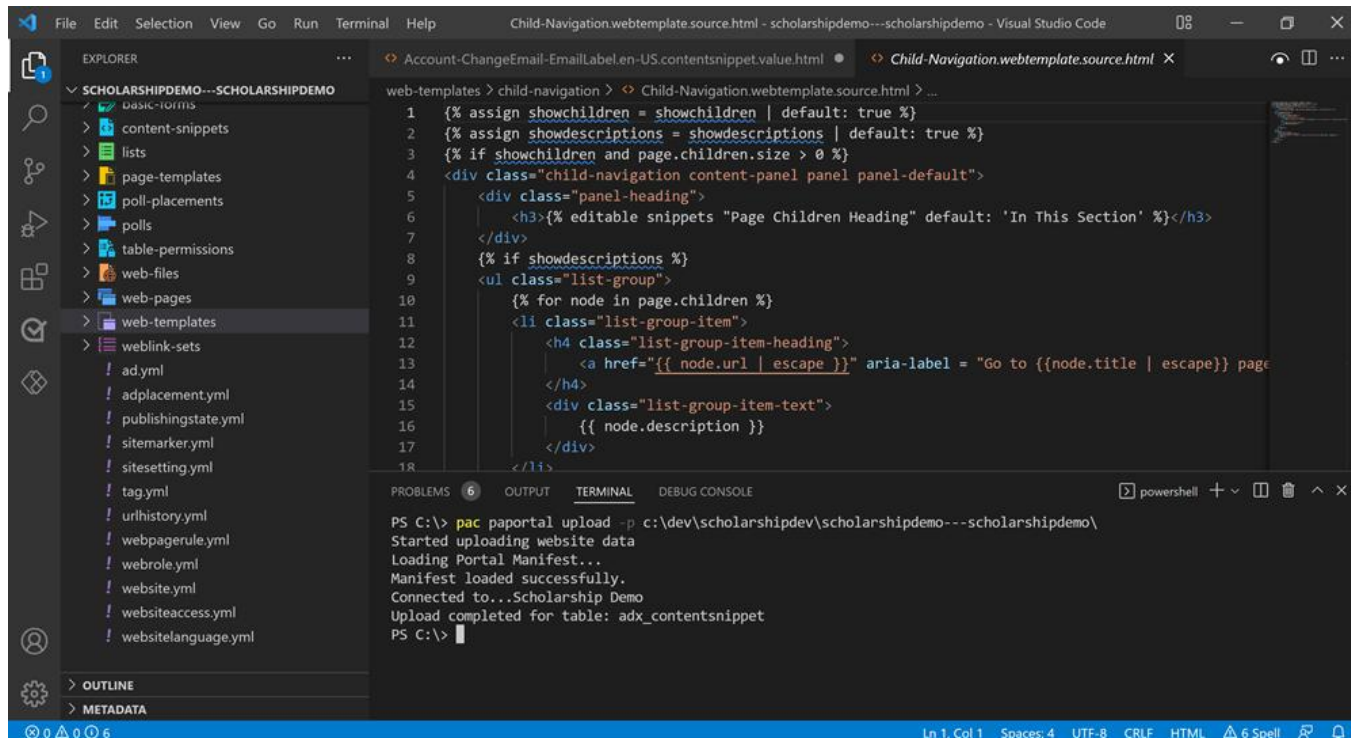


# What is Power Pages?

**Power Pages** is based on Bootstrap, which provides support for building websites that are responsive, mobile-friendly, and available in various form factors.

# What is Power Pages?

Makers can work with pro developers in fusion teams to extend the functionality using Visual Studio Code and the Microsoft Power Platform CLI



The screenshot shows the Visual Studio Code interface. The Explorer pane on the left displays a project structure for 'SCHOLARSHIPDEMO'. The main editor area shows the source code for 'Child-Navigation.webtemplate.source.html', which includes Liquid tags for assigning variables and rendering a list of children. The Terminal pane at the bottom shows the execution of the 'pac paportal upload' command, which successfully uploads website data.

```
1 {% assign showchildren = showchildren | default: true %}
2 {% assign showdescriptions = showdescriptions | default: true %}
3 {% if showchildren and page.children.size > 0 %}
4 <div class="child-navigation content-panel panel-default">
5   <div class="panel-heading">
6     <h3>{% editable snippets "Page Children Heading" default: 'In This Section' %}</h3>
7   </div>
8   {% if showdescriptions %}
9   <ul class="list-group">
10    {% for node in page.children %}
11    <li class="list-group-item">
12      <h4 class="list-group-item-heading">
13        <a href="{{ node.url | escape }}" aria-label = "Go to {{node.title | escape}} page">
14      </h4>
15      <div class="list-group-item-text">
16        {{ node.description }}
17      </div>
18    </li>
19  </ul>
20 </div>
```

```
PS C:\> pac paportal upload -p c:\dev\scholarshipdev\scholarshipdemo---scholarshipdemo\
Started uploading website data
Loading Portal Manifest...
Manifest loaded successfully.
Connected to..Scholarship Demo
Upload completed for table: adx_contentsnippet
PS C:\>
```



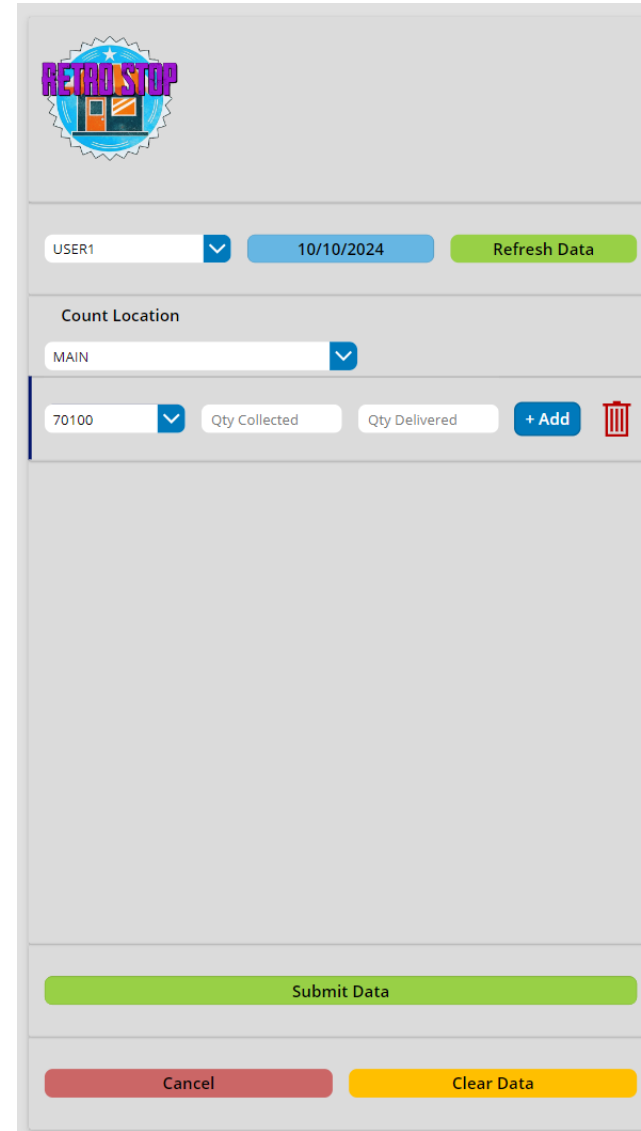
# Power App Examples



# Canvas App – Retro Stop Kit

# Canvas App – Retro Stop Kit Application

The Retro Stop Application kit was designed to track and submit stock collected and delivered on site.

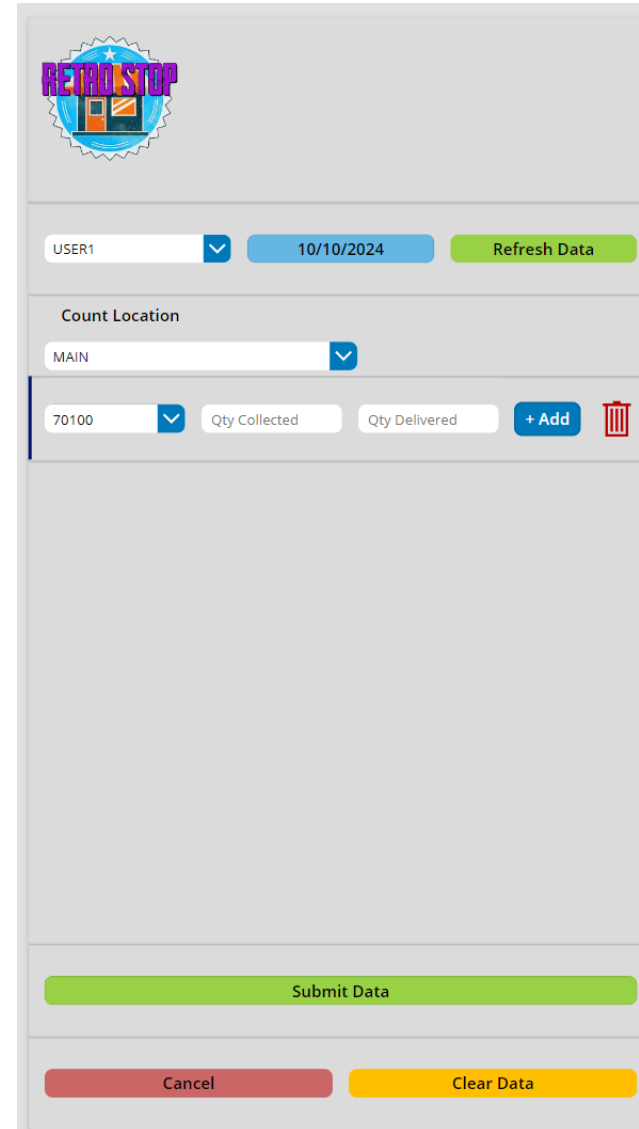


The screenshot displays the Retro Stop Kit Application interface. At the top left is the 'RETRO STOP' logo. Below it, there are three main sections: 1) User and Date: A dropdown menu showing 'USER1', a date field with '10/10/2024', and a green 'Refresh Data' button. 2) Count Location: A dropdown menu showing 'MAIN'. 3) Data Entry: A row with a dropdown menu showing '70100', two input fields labeled 'Qty Collected' and 'Qty Delivered', a blue '+ Add' button, and a red trash icon. At the bottom, there are three buttons: a green 'Submit Data' button, a red 'Cancel' button, and a yellow 'Clear Data' button.

# Canvas App – Retro Stop Kit Application

The app uses an API to communicate with Business Central.

Pulling down the relevant data into a collection, on press of “Refresh Data”



The screenshot displays the Retro Stop Kit application interface. At the top left is the 'RETRO STOP' logo. Below it, there is a user selection dropdown showing 'USER1', a date field set to '10/10/2024', and a green 'Refresh Data' button. Underneath is a 'Count Location' dropdown set to 'MAIN'. A data entry row includes a dropdown with '70100', a 'Qty Collected' input field, a 'Qty Delivered' input field, a blue '+ Add' button, and a red trash icon. At the bottom, there are three buttons: a green 'Submit Data' button, a red 'Cancel' button, and a yellow 'Clear Data' button.



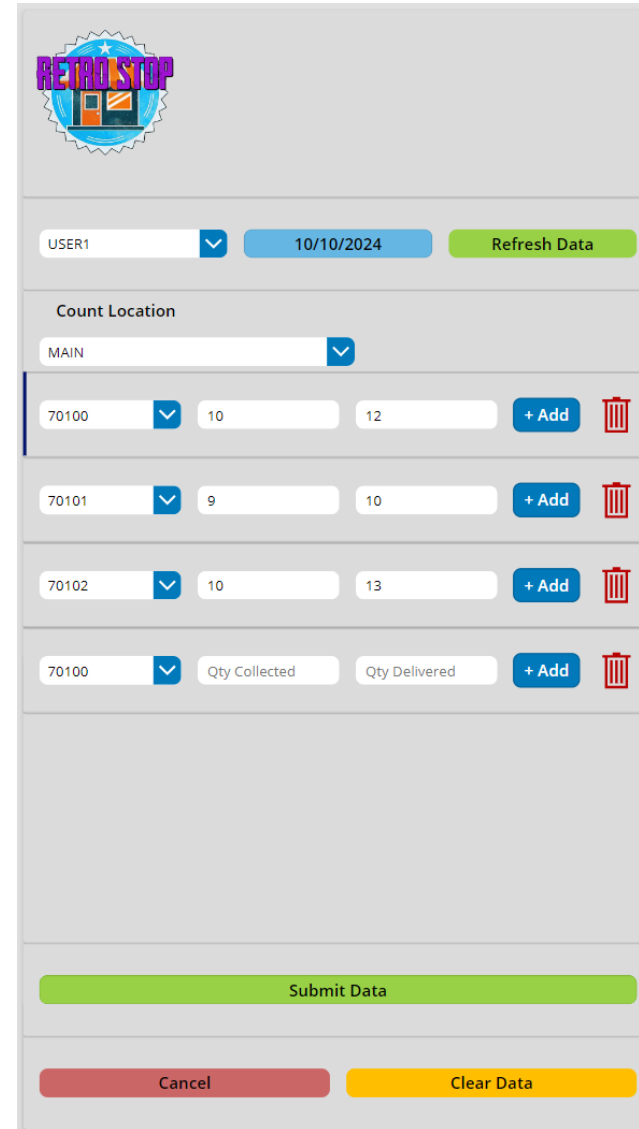
# Canvas App – Retro Stop Kit Application

The app pulls data from Business Central via API messages

Date and Time ↓	Message Short	Response Short	APP Code	Entry No.
11/10/2024 09:29	[{"action":"get","appcode":"KIT","table":"wmsuserlist","value":"Get...]	[{"userid":"USER1","defaultlocationcode":""},{"...	KIT	{2e779a07-e82d-464b-9c62-44f3c9c8fb59}
11/10/2024 09:29	[{"action":"get","appcode":"KIT","table":"kitlocationlist","value":"G...]	[{"code":"MAIN","name":"Main Warehouse"}]	KIT	{092467b0-21eb-4757-9027-ffe954e249b4}
11/10/2024 09:29	[{"action":"get","appcode":"KIT","table":"kitlist","value":"Get Kit Lis...]	[{"customerno":"10000","customername":"Th...]	KIT	{969b717d-6ae9-42b4-84ee-ebab072cbba5}

# Canvas App – Retro Stop Kit Application

It allows quick collection of vital onsite information while doing collection and deliveries of stock.



The screenshot displays the Retro Stop Kit Application interface. At the top left is the 'RETRO STOP' logo. Below it, there is a user selection dropdown set to 'USER1', a date field showing '10/10/2024', and a green 'Refresh Data' button. The 'Count Location' is set to 'MAIN'. The main data entry area consists of four rows, each with a dropdown menu, two input fields, and two action buttons ('+ Add' and a trash icon). The first row has values 70100, 10, and 12. The second row has 70101, 9, and 10. The third row has 70102, 10, and 13. The fourth row has 70100, 'Qty Collected', and 'Qty Delivered'. At the bottom, there are three buttons: a green 'Submit Data' button, a red 'Cancel' button, and a yellow 'Clear Data' button.

Item ID	Qty Collected	Qty Delivered
70100	10	12
70101	9	10
70102	10	13
70100	Qty Collected	Qty Delivered

## Canvas App – Retro Stop Kit Application

On Submission, the app has confirmation prompts before it submits data to business central via API Messages

**Are you sure you want to submit these counts?**

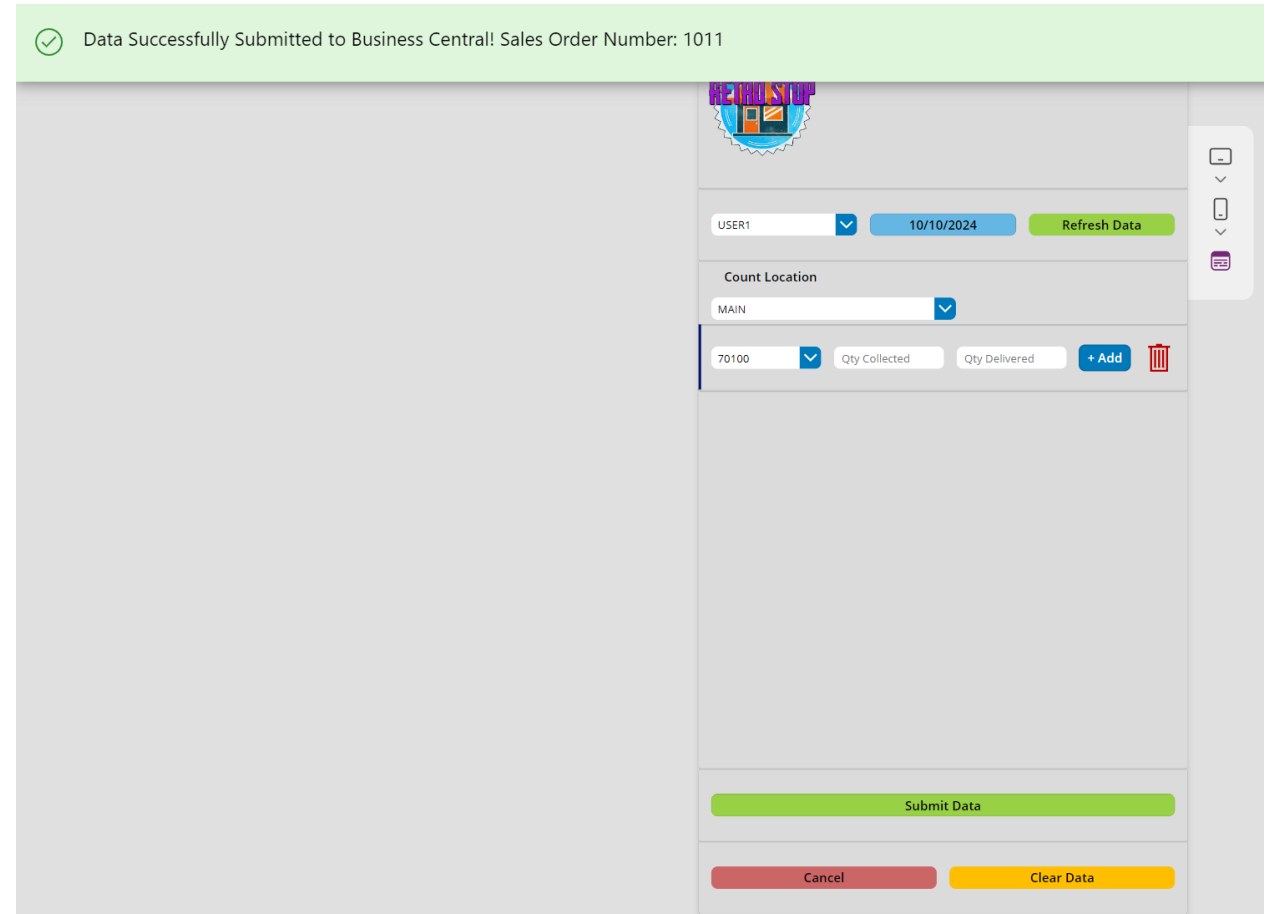
**Cancel**

**Confirm**

# Canvas App – Retro Stop Kit Application

Submission of data feedback to the app to advise of any errors or successful Sales Order creation.

✓ Data Successfully Submitted to Business Central! Sales Order Number: 1011



The screenshot shows the Retro Stop Kit application interface. At the top, a green notification bar displays a checkmark and the text "Data Successfully Submitted to Business Central! Sales Order Number: 1011". Below this, the app header includes a logo and a user selection dropdown set to "USER1", a date field showing "10/10/2024", and a "Refresh Data" button. The main section is titled "Count Location" and features a dropdown menu set to "MAIN". Below this, there is a data entry row with a dropdown set to "70100", input fields for "Qty Collected" and "Qty Delivered", an "+ Add" button, and a trash icon. At the bottom of the form, there are three buttons: "Submit Data" (green), "Cancel" (red), and "Clear Data" (yellow). A vertical sidebar on the right contains navigation icons for home, back, forward, and list.

# Canvas App – Retro Stop Kit Application

We can see the API message with a successful response of a sales order creation

Date and Time ↓	Message Short	Response Short	APP Code	Entry No.
11/10/2024 09:42	[{"action": "post", "appcode": "KIT", "countlocation": "MAIN", "custo...	[{"salesorderno": "1011"}]	KIT	{89dbdef7-6070-4d9a-af50-c446d173a40e}



# Canvas App – Sales Dashboard

# Canvas App – Sales Dashboard App

The screenshot displays the Canvas App Sales Dashboard. At the top, there is a search bar and a 'Quick Nav Button'. Below this, two summary cards are shown: 'Total Open Orders' with a value of 3, and 'Total Order Value' with a value of £41,250. The main section is titled 'Overview' and contains a table of accounts. The table has columns for Account Name, Primary Contact, Created On, Status, Annual Revenue, and Main Phone. Each row in the table includes a green 'Active' status button and a right-pointing arrow. The table lists 9 sample accounts, all with a creation date of 22/05/2024 and an 'Active' status.

Account Name	Primary Contact	Created On	Status	Annual Revenue	Main Phone
Fourth Coffee (sample)	Yvonne McKay (sample)	22/05/2024	Active	£ 100,000.00	555-0150
Litware, Inc. (sample)	Susanna Stubberod (sa...	22/05/2024	Active	£ 20,000.00	555-0151
Adventure Works (samp...	Nancy Anderson (sample)	22/05/2024	Active	£ 60,000.00	555-0152
Fabrikam, Inc. (sample)	Maria Campbell (sample)	22/05/2024	Active	£ 80,000.00	555-0153
Blue Yonder Airlines (sa...	Sidney Higa (sample)	22/05/2024	Active	£ 10,000.00	555-0154
City Power & Light (sam...	Scott Konersmann (sam...	22/05/2024	Active	£ 100,000.00	555-0155
Contoso Pharmaceutica...	Robert Lyon (sample)	22/05/2024	Active	£ 60,000.00	555-0156
Alpine Ski House (samp...	Paul Cannon (sample)	22/05/2024	Active	£ 90,000.00	555-0157
A. Datum Corporation (...	Rene Valdes (sample)	22/05/2024	Active	£ 10,000.00	555-0158

# Canvas App – Sales Dashboard App

The Sales Dashboard app is based on the Foundation App Tecman has developed to help excel application builds

The screenshot displays the 'Accounts' section of the Sales Dashboard App. At the top, there is a search bar and a 'Quick Nav Button'. Below this, two large blue cards provide summary statistics: 'Total Open Orders' (3) and 'Total Order Value' (£41,250). The main area is titled 'Overview' and contains a grid of account cards. Each card shows the account name, a contact person, an 'Active' status, and a total value with a right-pointing arrow. The accounts listed are:

Account Name	Contact	Status	Total Value
Fourth Coffee (sample)	Yvonne McKay (sample)	Active	£ 100,000
Litware, Inc. (sample)	Susanna Stubberod (sample)	Active	£ 20,000
Adventure Works (sample)	Nancy Anderson (sample)	Active	£ 60,000
Fabrikam, Inc. (sample)	Maria Campbell (sample)	Active	£ 80,000
Blue Yonder Airlines (sample)	Sidney Higa (sample)	Active	£ 10,000
City Power & Light (sample)	Scott Konersmann (sample)	Active	£ 100,000
Contoso Pharmaceuticals (sample)		Active	
Alpine Ski House (sample)		Active	
A. Datum Corporation (sample)		Active	



# Canvas App – Sales Dashboard App

Responsive screens built upon a container structure

Tree view

Screens Components

Search

+ New screen

- App
  - HomeScreen
    - Root\_cntr
      - SideMenu\_cntr
        - LeftSideNavigationBar\_Collapsible\_1
      - Page\_cntr
        - Container4
          - HeaderSearchBar\_1
        - Container5
          - SummaryCardGallery\_1
        - OrderGallery\_cntr\_2
          - GalleryTopBar\_cntr\_3
          - GalleryBody\_cntr\_2
            - GalleryTableHeader\_cntr\_3
            - GalleryTableData\_cntr\_3
  - OrdersScreen

Search... Quick Nav Button

Active Orders

Total Orders 4

Total Orders Value £ 41,250.00

Filter New Order

Order ID	Name	Created On	Status	Date Fulfilled	Total Tax	Total Amount	
0-01002-F7G1S3	FoundationApp - CS ...	04/06/2024	Active		£ 20.00	£ 650.00	→
0-01003-C2W6T3	Order for - Foundatio...	06/06/2024	Active		£ 2,400.00	£ 38,400.00	→
0-01000-H3H8Z5	Test 1	22/05/2024	Fulfilled	03/06/2024	£ .00	£ 2,200.00	→
0-01001-M8T1M2	Test 2	23/05/2024	Canceled		£ .00	£ .00	→

# Canvas App – Sales Dashboard App

The application utilises Library components which have pre-defined components that can be drag into the app and customised.

- Library components
  - CustomToggleButton
  - HeaderSearchBar
  - LeftSideNavigationBar\_C
  - LeftSideNavigationBar\_St
  - MultiViewRecordGallery
  - RightSideFilter
  - SummaryCardGallery

### Properties

COMPONENT ?

SummaryCardGallery\_3

Display Advanced

Custom properties ⓘ

CardAmount_1to4	3
PrimaryColour	<input type="color"/>
SecondaryColour	<input type="color" value="#0070C0"/>
PrimaryTextColour	<input type="color"/>
IconColourText	RGBA(241, 244, 249, 1)
CardName_1	Active Invoices
CardName_2	Total Invoices
CardName_3	Total Invoiced Amount
CardName_4	Card 4 - Remove text to hide cards
CardValue_1	3
CardValue_2	3
CardValue_3	£ 2,200.00
CardValue_4	400

# Canvas App – Sales Dashboard App

Customisable components and buttons using the component library

The image shows a Canvas App editor interface for a Sales Dashboard App. The main dashboard is visible in the background, featuring a search bar, a 'Quick Nav Button', and three summary cards: 'Total Invoices 3', 'Total Invoiced Amount £ 2,200.00', and a list of invoices with 'Active' status and 'Tax: £' and 'Total: £' fields.

The 'Properties' panel is open, showing the following settings for the 'CustomToggleButton\_2' component:

- COMPONENT** (with a help icon): CustomToggleButton\_2
- Display** (selected) / Advanced
- Align in container**: Set by container (dropdown), with icons for top, center, bottom, and left alignment.
- Flexible width**: Off (toggle)
- Width**: 70
- Custom properties** (with an info icon):
  - BaseBG**: [Color swatch]
  - SelectedBG**: [Blue color swatch]
  - BaselconColour\_Text**: RGBA(131, 141, 157, 1)
  - SelectedIconColour...**: RGBA(246, 246, 250, 1)
  - IconImage\_1**: 

```
<svg xmlns='http://www.w3.org/2000/svg' width='16' height='16' fill='currentColor' />
```
  - IconImage\_2**: 

```
<svg xmlns='http://www.w3.org/2000/svg' width='16' height='16' fill='currentColor' />
```



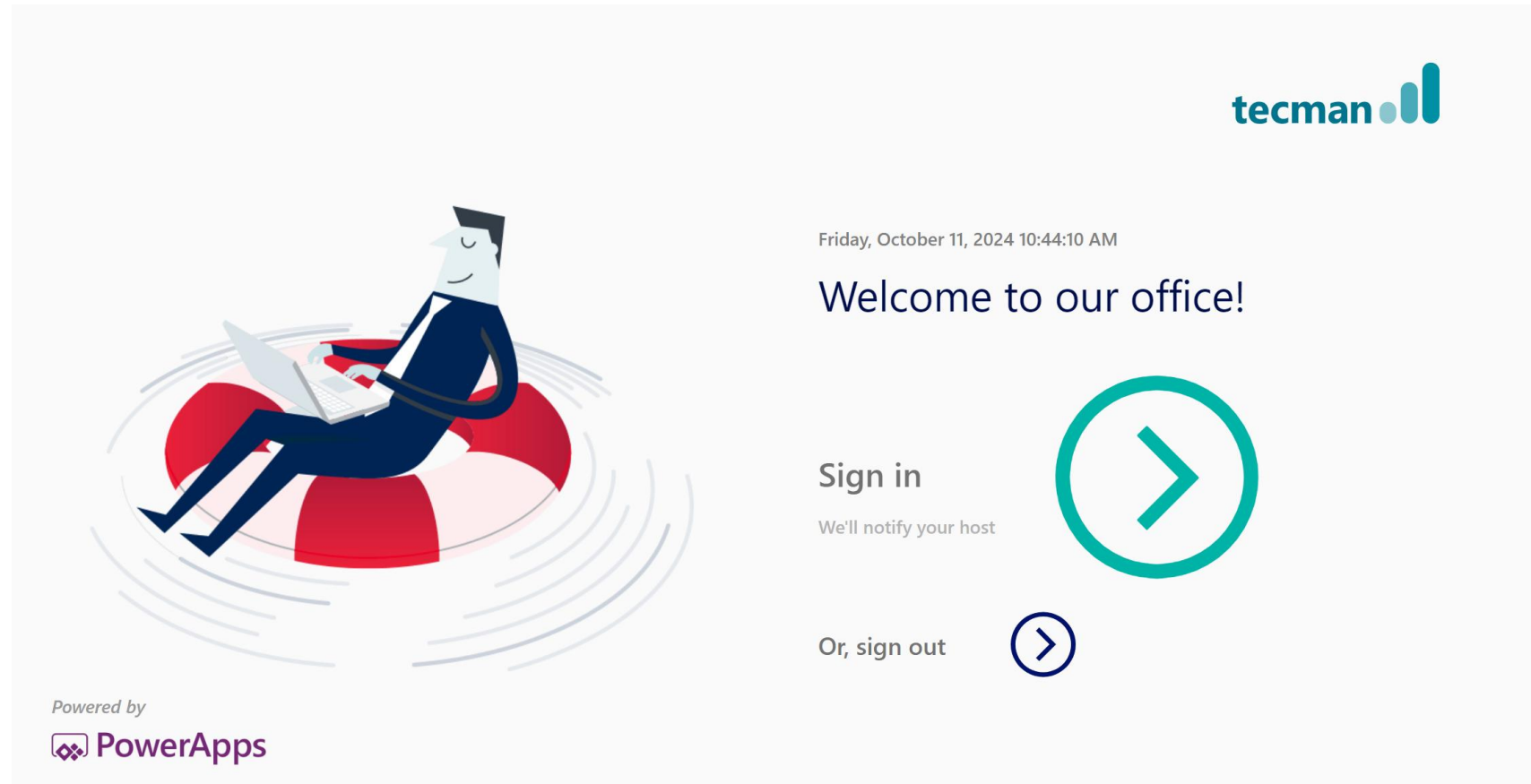
# Canvas App – Visitor Login System

# Canvas App – Visitor Login App



# Canvas App – Visitor Login App

The visitor login system allows customer to sign into our office, notifying the consultant of their arrival.



# Canvas App – Visitor Login App

Search for your visitor booking



Back

What's your name?

jason



Jason

Signed in at: 10/11/2024 10:46 AM

Sign out



# Canvas App – Visitor Login App

Customers can enter their details when arriving to the office with no scheduled booking. This will notify reception.



Back

Friday, October 11, 2024 10:45:49 AM

We need a few details from you

Continue



Full Name:

?

Company:

Not applicable

?

Car Registration:

No Car

?

Here to Visit:

I'm not sure

?



# Canvas App – Visitor Login App

Shows agreement for signing into the office



Back

Friday, October 11, 2024 10:44:41 AM

## Visitor Agreement

### Health and Safety

Visitors must co-operate with Tecman Representatives on health and safety matters and comply with any health and safety instructions.

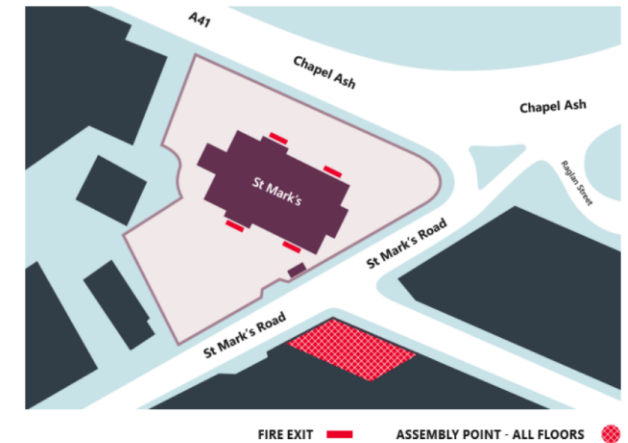
Visitors must take reasonable care of their own health and safety and that of others by observing safety rules applicable to them and following instructions for the use of equipment.

### Emergency Evacuation and Fire Precaution

Visitors must alert a Tecman representative upon discovering a fire, so long as it is safe to do so.

If a Visitor discovers a fire, they should not attempt to tackle. They should operate the nearest fire alarm, exit the building, then call the emergency services if necessary. On hearing the alarm leave the building immediately.

Take great care crossing the road and assemble with the rest of the team to the evacuation point on St Mark's Road (see map below) - keep to the pavement and stay with the team. Alert the team leader or manager if anybody is missing. Keep quiet and listen for announcements from the Evacuation Control Officer.

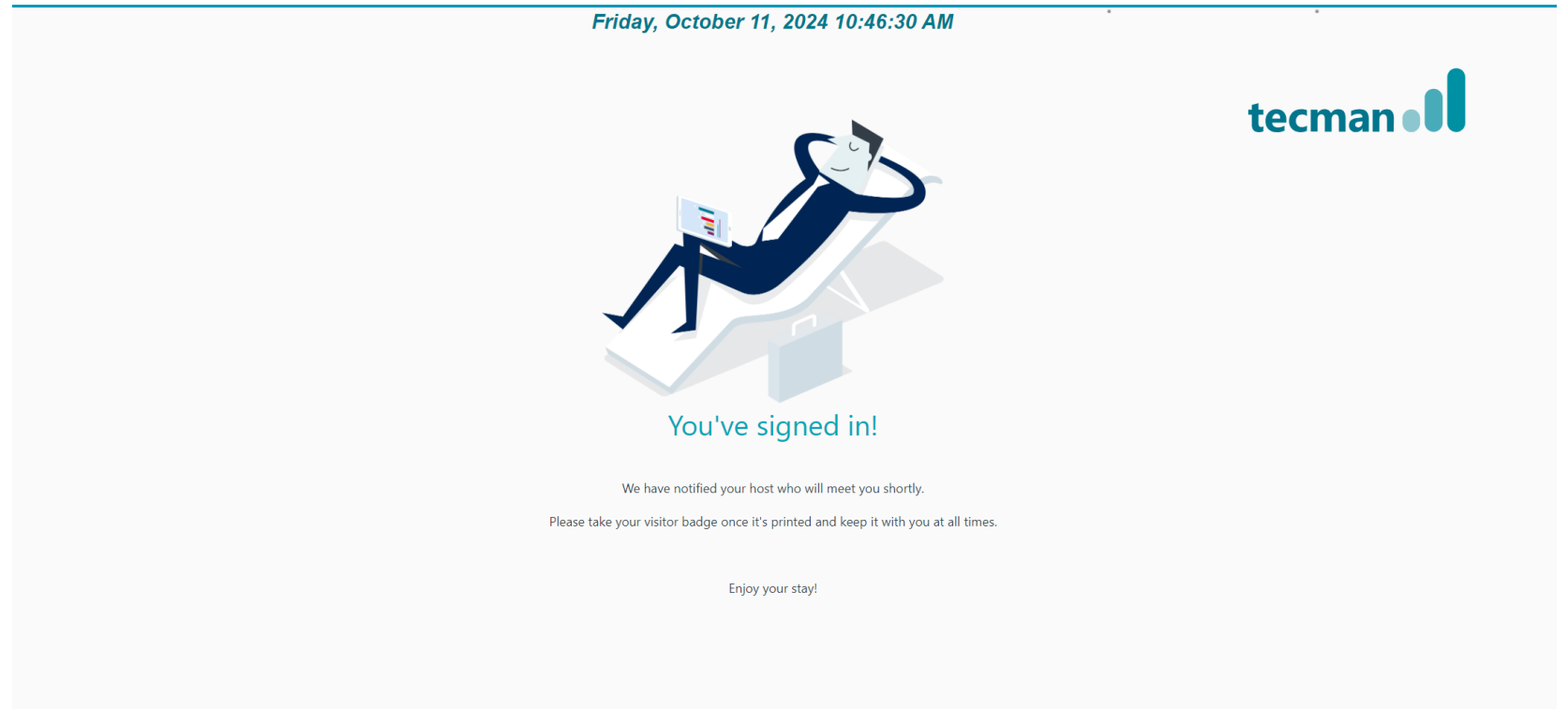


Agree & Sign In



# Canvas App – Visitor Login App

Confirmation of being signed in



# Canvas App – Visitor Login App (Admin)

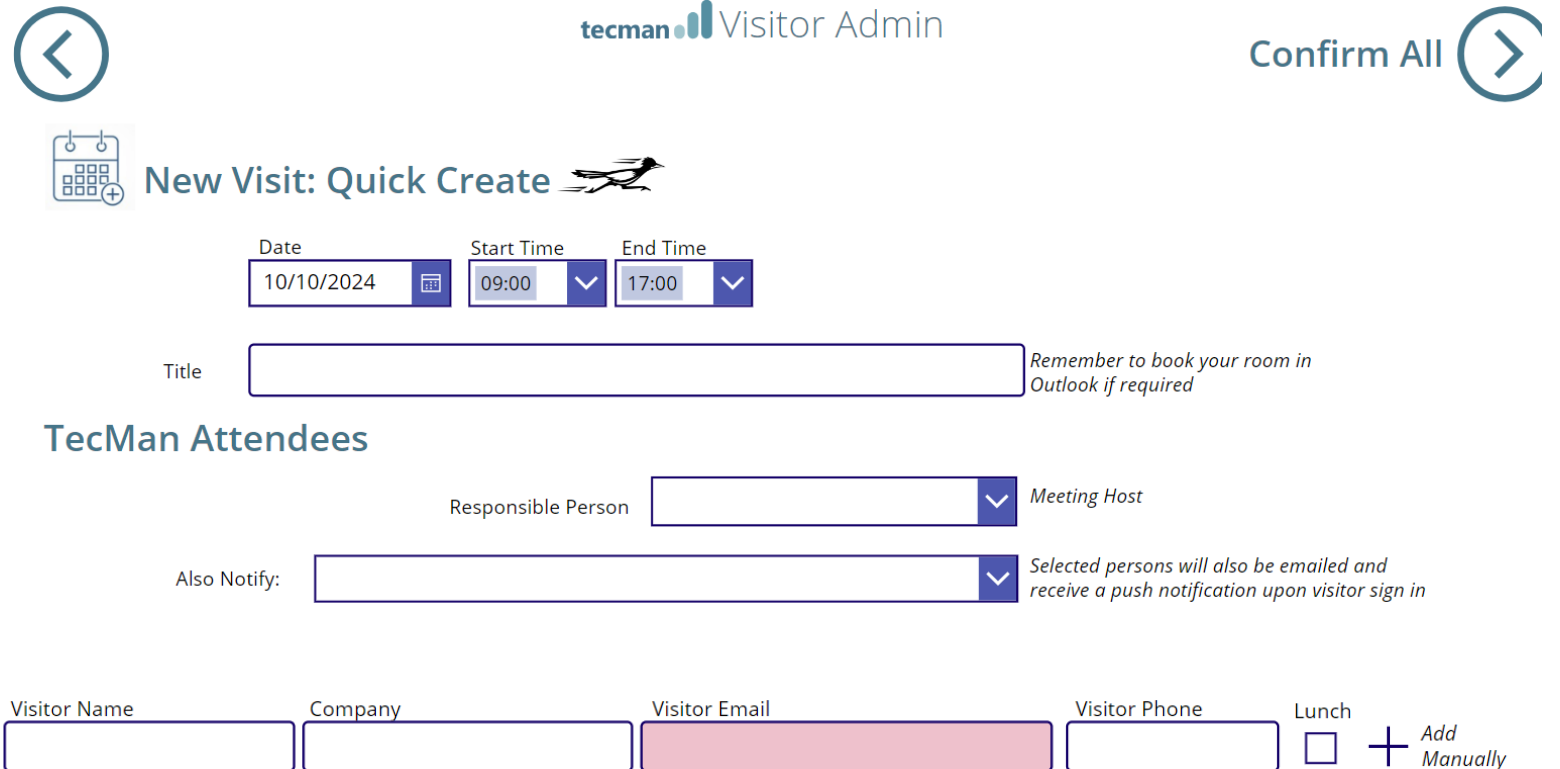
Admin side of the app allows us to check and book visits to the office with customers.

Also displays current visitors signed in with audit history



# Canvas App – Visitor Login App (Admin)

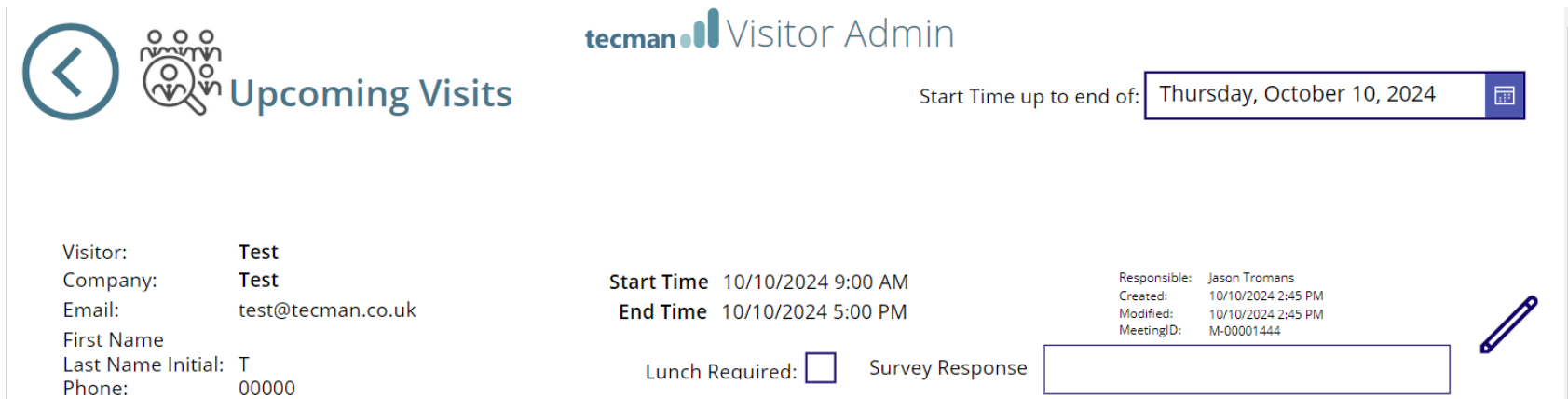
Allows quick creation of new visits for customers through a simple UI



The screenshot shows the 'New Visit: Quick Create' form in the TecMan Visitor Admin interface. At the top, there is a back arrow icon on the left, the 'tecman Visitor Admin' logo in the center, and a 'Confirm All' button with a right arrow icon on the right. Below the header, there is a calendar icon and the title 'New Visit: Quick Create' with a bird icon. The form fields are: 'Date' (10/10/2024), 'Start Time' (09:00), and 'End Time' (17:00). A 'Title' field is present with a note: 'Remember to book your room in Outlook if required'. Under the heading 'TecMan Attendees', there is a 'Responsible Person' dropdown menu with a 'Meeting Host' note, and an 'Also Notify:' dropdown menu with a note: 'Selected persons will also be emailed and receive a push notification upon visitor sign in'. At the bottom, there are input fields for 'Visitor Name', 'Company', 'Visitor Email' (highlighted in pink), and 'Visitor Phone'. To the right of these fields is a 'Lunch' checkbox and a '+ Add Manually' button.

# Canvas App – Visitor Login App (Admin)

Shows details of upcoming visits with customer details



The screenshot displays the 'tecman Visitor Admin' interface. At the top left, there is a navigation icon (a circle with a left-pointing arrow) and a magnifying glass icon over a group of people, with the text 'Upcoming Visits' next to it. The main header reads 'tecman Visitor Admin'. On the right, there is a date selection field: 'Start Time up to end of: Thursday, October 10, 2024'. Below this, the visitor details are listed: Visitor: Test, Company: Test, Email: test@tecman.co.uk, First Name, Last Name Initial: T, and Phone: 00000. To the right of these details, the visit schedule is shown: Start Time 10/10/2024 9:00 AM and End Time 10/10/2024 5:00 PM. Further right, the responsible person and dates are listed: Responsible: Jason Tromans, Created: 10/10/2024 2:45 PM, Modified: 10/10/2024 2:45 PM, and MeetingID: M-00001444. At the bottom, there is a 'Lunch Required' checkbox (unchecked) and a 'Survey Response' text input field. A pencil icon is visible on the right side of the interface.

tecman Visitor Admin

Start Time up to end of: Thursday, October 10, 2024

Upcoming Visits

Visitor: Test  
Company: Test  
Email: test@tecman.co.uk  
First Name  
Last Name Initial: T  
Phone: 00000

Start Time 10/10/2024 9:00 AM  
End Time 10/10/2024 5:00 PM

Lunch Required:  Survey Response

Responsible: Jason Tromans  
Created: 10/10/2024 2:45 PM  
Modified: 10/10/2024 2:45 PM  
MeetingID: M-00001444

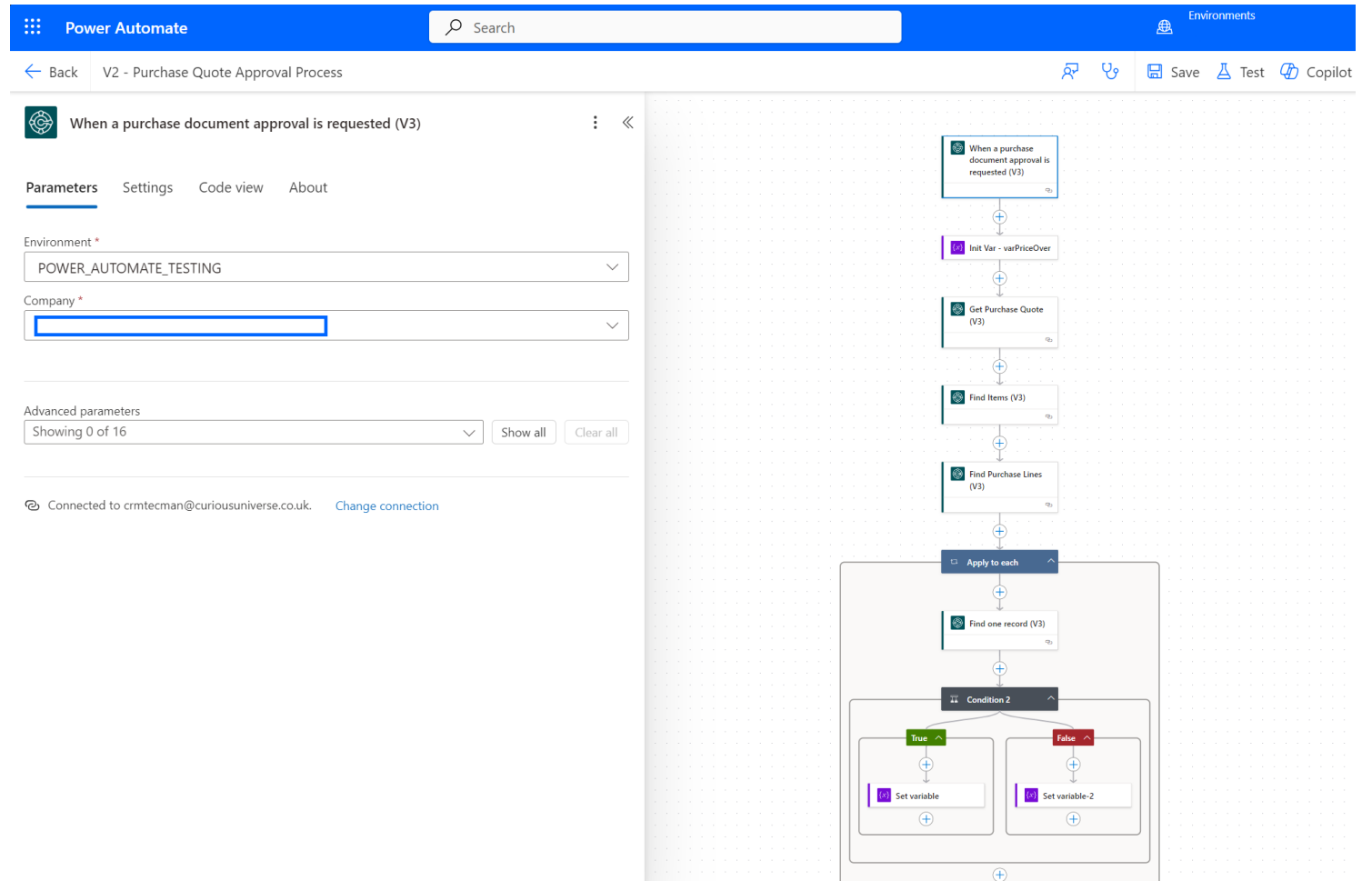


# Power Automate – Approval Process

# Power Automate – Approval Process

This power automate was built to submit approval requests based on the Purchase Quote price.

We want to send the approval to the correct person based on values on the Purchase Quote record in Business Central.



# Power Automate

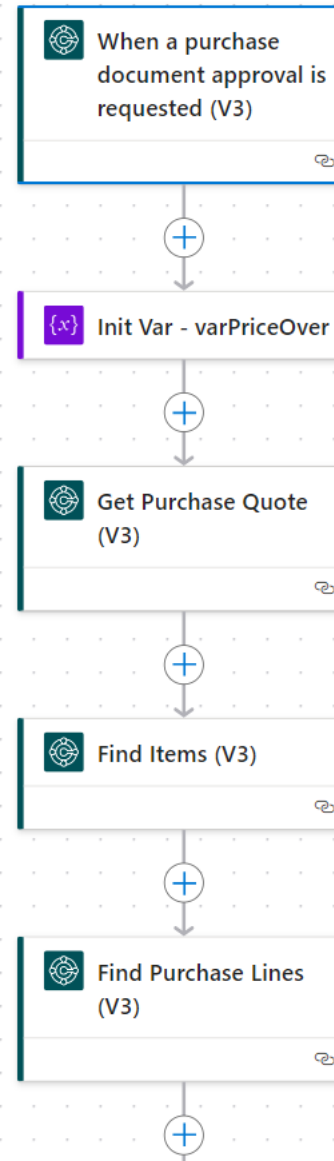
Trigger – When a purchase document approval is requested from Business Central:

Purchase Quote

PQ006953 · AMK Book Services

Home Prepare Print/Send Request Approval Quote

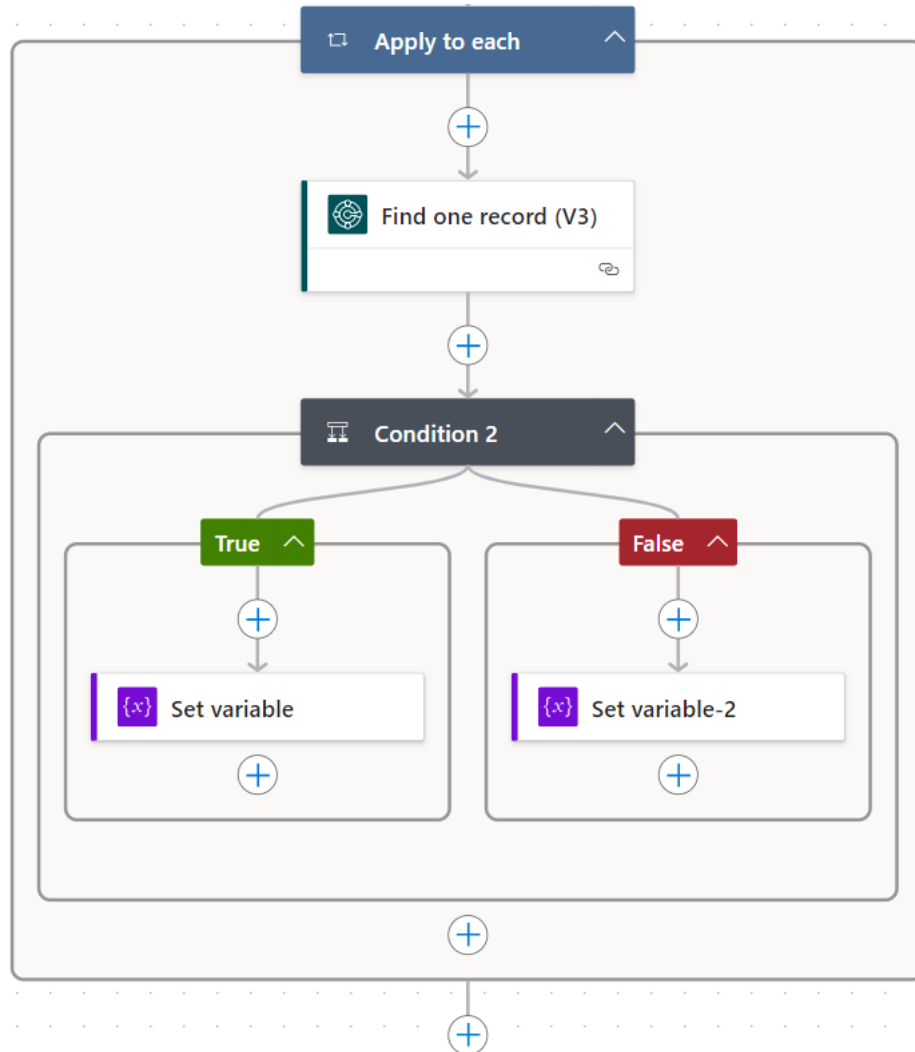
Send Approval Request  Cancel Approval Request





# Power Automate – Approval Process

Condition – Is the “Direct Unit Cost” greater or lower than “Tender Price”



# Power Automate – Approval Process

Condition – True or False;  
Will send an approval  
request to the correct  
person.

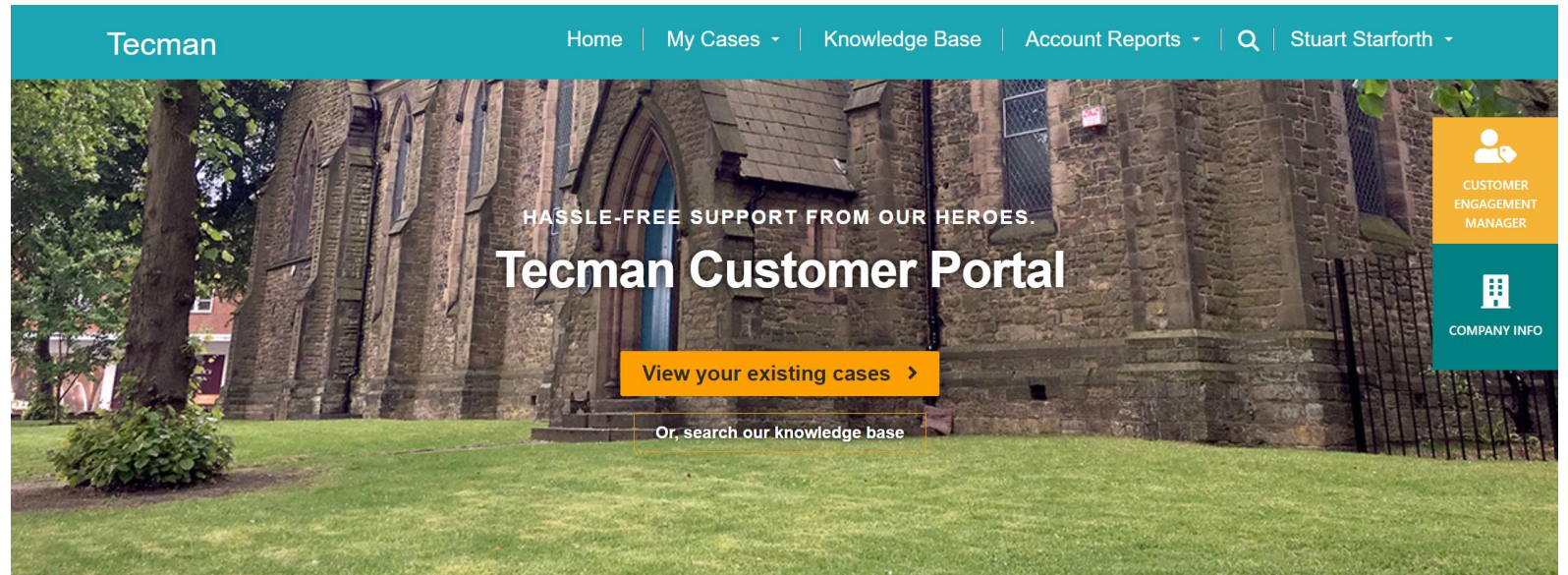




# Power Pages – Customer Portal

# Power Pages – Tecman Customer Portal

Power Pages portal used as a customer portal for logging support cases



Hey Stuart!

As a TecMan customer, we want you to have the right tools and resources at your fingertips to get the best out of your Dynamics 365 business apps, now and in the future. In this portal you can interact with a support desk (create, manage and see all your cases), as well as search the knowledgebase for priceless solution information and much more.

Our aim is to make this the home of your engagements with TecMan.

Thanks again for being part of Team TecMan.



# Power Pages – Tecman Customer Portal

View existing cases via an open cases view on the portal

Tecman Home | My Cases ▾ | Knowledge Base | Account Reports ▾ | 🔍 | Stuart Starforth ▾

## Support

☰ Web - Open Cases ▾

Case Number	Case Title	Case Type	Subject	Case Origin	Customer	Status Reason	Created On	
<a href="#">CAS-05368-J3P6L0</a>	Issue with Quotes in CRM	User Training/Question	Microsoft Dynamics 365 CRM Apps	Internal	Technology Management Ltd	Under Investigation	08/10/2024 11:52 AM	▾
<a href="#">CAS-05229-D8P6S0</a>	Sending email from contact owners - User Secondary Email	Support Free of Charge	Microsoft Dynamics 365 CRM Apps	Internal	Technology Management Ltd	Under Investigation	02/10/2024 8:24 AM	▾
<a href="#">CAS-05227-K6P3M4</a>	Contact Owners should be the same as the Account Owner	Support Free of Charge	Microsoft Dynamics 365 CRM Apps	Internal	Technology Management Ltd	Under Investigation	02/10/2024 8:14 AM	▾
<a href="#">CAS-05083-V0X6G1</a>	Knowledge Article Images	Support Free of Charge	Microsoft Dynamics 365 CRM Apps	Internal	Technology Management Ltd	Under Investigation	26/09/2024 8:39 AM	▾

# Power Pages – Tecman Customer Portal

Create new cases to submit to support

## Open a new Case

Please click submit below to save case details and then you can add further comments or attachments.

**Case Title \***

**Customer \***

**Subject \***

**Description**

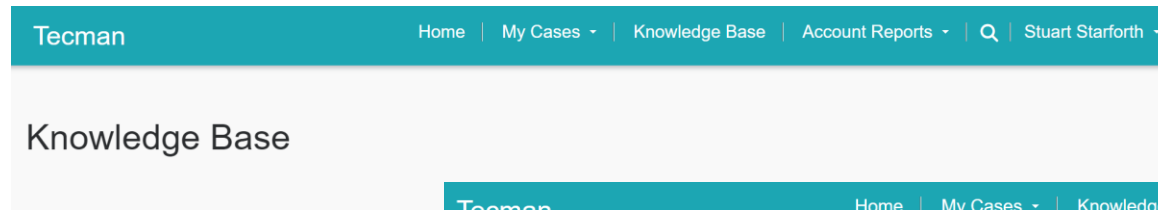
Enter text...

Font Size B I U

**Which environment is effected?**

# Power Pages – Tecman Customer Portal

The portal houses a knowledge base customers can access



The Knowledge Base contains numerous support references that are constantly updated, expanded, and refined to ensure accuracy.

## Bank Account Reconciliation Error - Statement status must be equal to "Bank Acc. Entry Applied"

Print

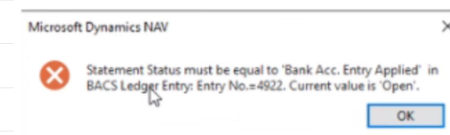
Views: 8

- [Microsoft Dynamics NAV/BC](#)
- [Microsoft Dynamics 365 CRM Apps](#)
- [Power Platform](#)
- [Jet/BI Reporting](#)
- [EDI](#)
- [Technical](#)

### Bank Account Reconciliation Error message – Statement status must be equal to "Bank Acc. Entry Applied"

When trying to post a bank account reconciliation you might come across this error message:

Graphical user interface, text<br><br>Description automatically generated



There are two main reasons why this error may come up, these are as follows:

The first one is due to having duplicate lines in the ledger entries. To fix this problem, highlight the duplicated line and delete it. The bank account reconciliation should now post fine.

The second reason could be due to the type not being a match to either the bank statement lines or bank account ledger entries. For example, if the line is located on the bank statement lines side, the account type must be bank account ledger entry or difference. If the line is located on the bank account ledger entries side, the account type must be check ledger entry or difference. To fix this, change the account type and post the reconciliation.

If the bank account reconciliation is still not posting after checking for these two problems, then the best thing to do would be delete it and redo it. You should do this after looking out for the previous two problems.

# Power Pages – Tecman Customer Portal

Power Pages portal can be customised via a drag and drop experience

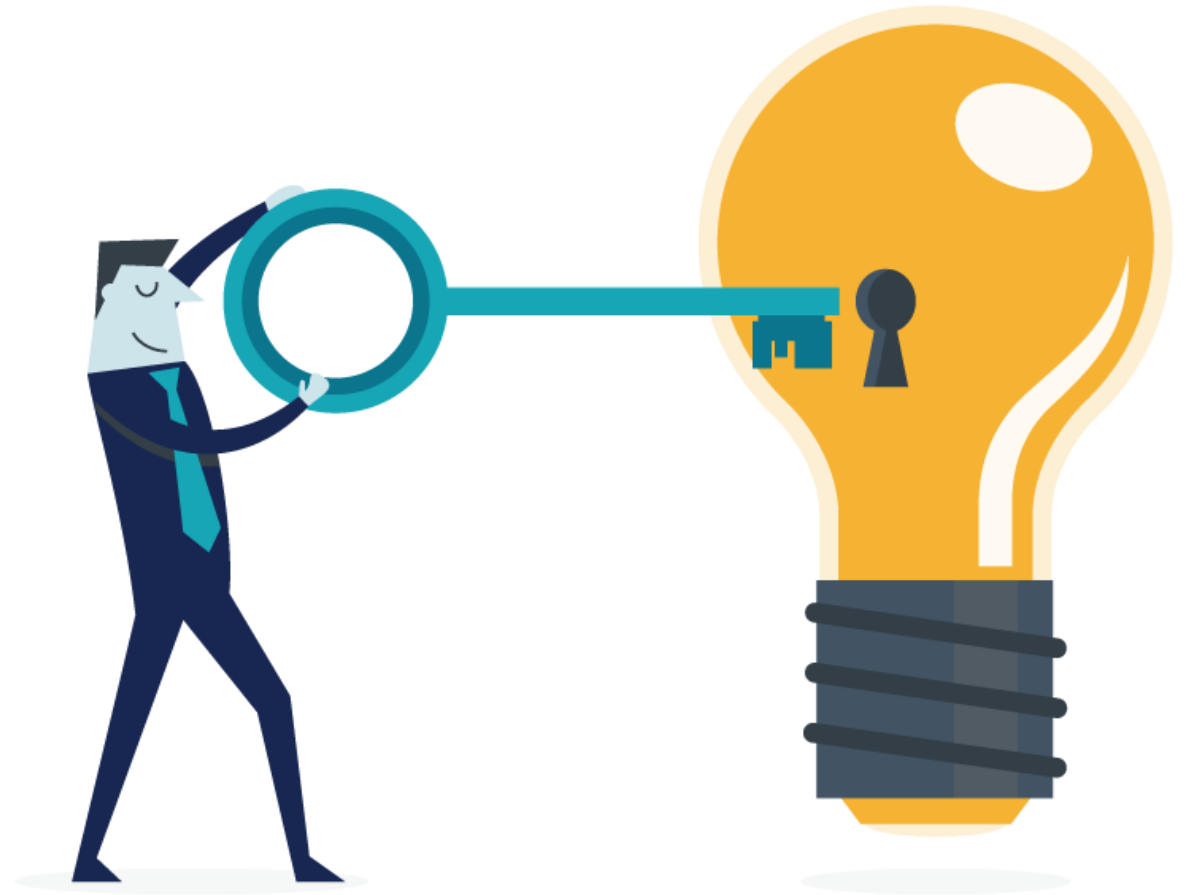
The screenshot displays the Power Pages editor for the Tecman Customer Portal. The interface is divided into several sections:

- Pages List:** A sidebar on the left lists various pages under 'Main navigation' (Home, My Cases, Knowledge Base, Account Reports) and 'Other pages' (Access Denied, Account Overview, Contact us, Create Case, Customer Service - Case Details, Customer Service - Edit Case, Default Offline Page, EDI, EDI Transaction Documents, Knowledge Base - Article Details, Knowledge Base - Category Deta..., My Reports, Page Not Found, Work Request Overview).
- Preview Area:** The main area shows a live preview of the customer portal. It features a teal header with the 'Tecman' logo and a menu icon. Below the header is a hero image of a stone building with the text 'HASSLE-FREE SUPPORT FROM OUR HEROES. Tecman Customer Portal'. Two call-to-action buttons are present: 'View your existing cases' and 'Or, search our knowledge base'. On the right side of the preview, there are two buttons: 'CUSTOMER ENGAGEMENT MANAGER' and 'COMPANY INFO'.
- Editor Interface:** The top bar shows 'Tecman Enhanced - Public - Saved' and includes icons for 'Preview' and 'Sync'. A yellow warning message states: 'The data displayed in your site can be seen by anyone. If that's not what you want, change or eliminate the "Anonymous" role in your table permissions. [Learn more](#)'. A 'Manage table permissions' button is also visible. The bottom bar shows the error message 'Liquid object not found : Home/HomeDescription'.



# What we covered

1. Introduction
2. What are Power Apps?
3. Preview real-world examples
4. Power App logic & fundamentals
5. Do any of you NOT have an example in mind?





# Questions?

# Resources

Microsoft Power Apps:

<https://www.microsoft.com/en-us/power-platform/products/power-apps?msockid=11025b2d345266381cec4f783562676d>

Power Apps | Microsoft Learn:

<https://learn.microsoft.com/en-us/power-apps/>

<https://learn.microsoft.com/en-us/power-apps/guidance/planning/logic>

<https://learn.microsoft.com/en-us/power-platform/>

Thank you.

BUSINESS CENTRAL

connect

15<sup>th</sup> & 16<sup>th</sup> OCTOBER 2024

