

CRM connect

Power Apps – Ideas Becoming Reality





Can you hear me?



Is everything clear?



~ 45 mins



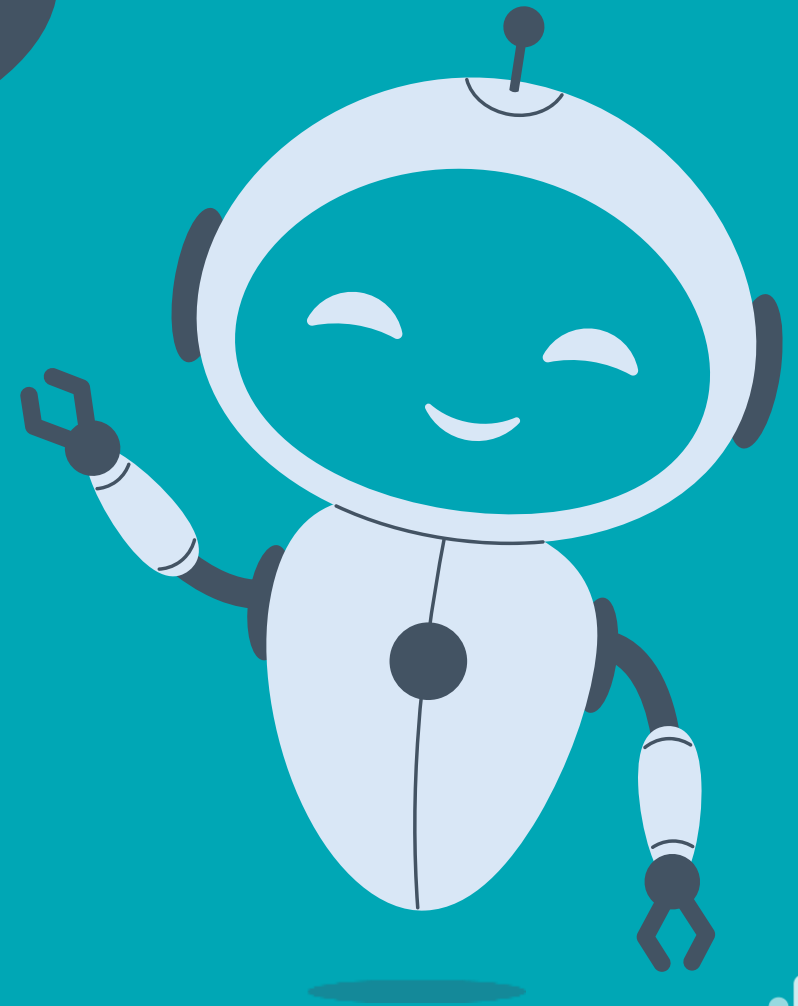
Q & A



Hi!

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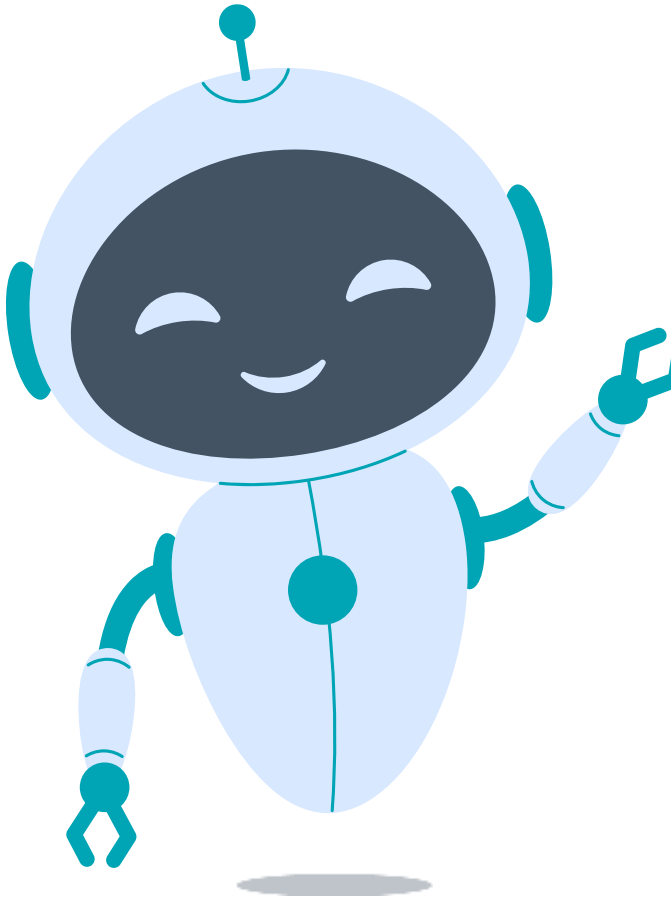


What we'll cover

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

Introduction

PowerApps



Off-system operational processes?

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



Introduction to Power Apps

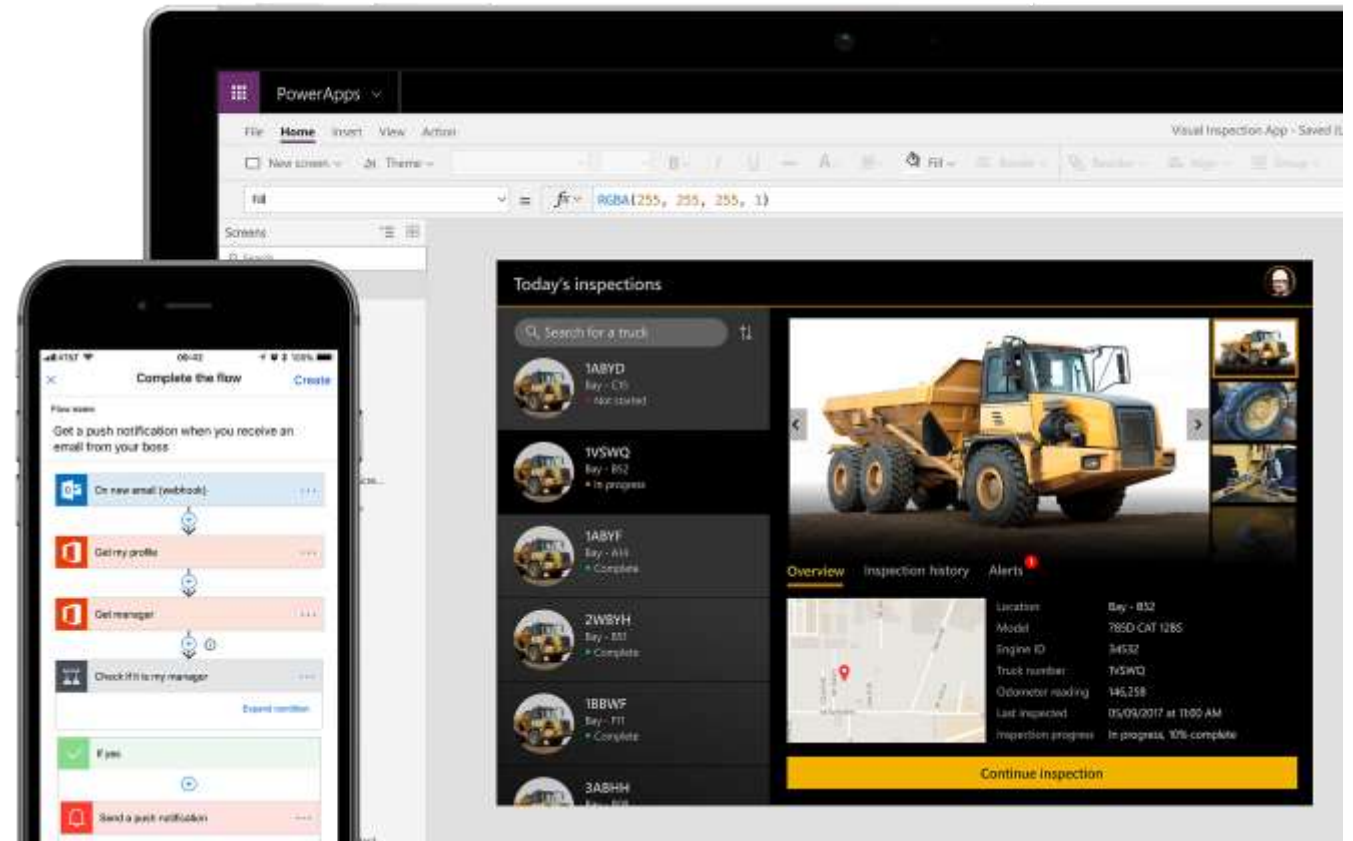
What are Power Apps?

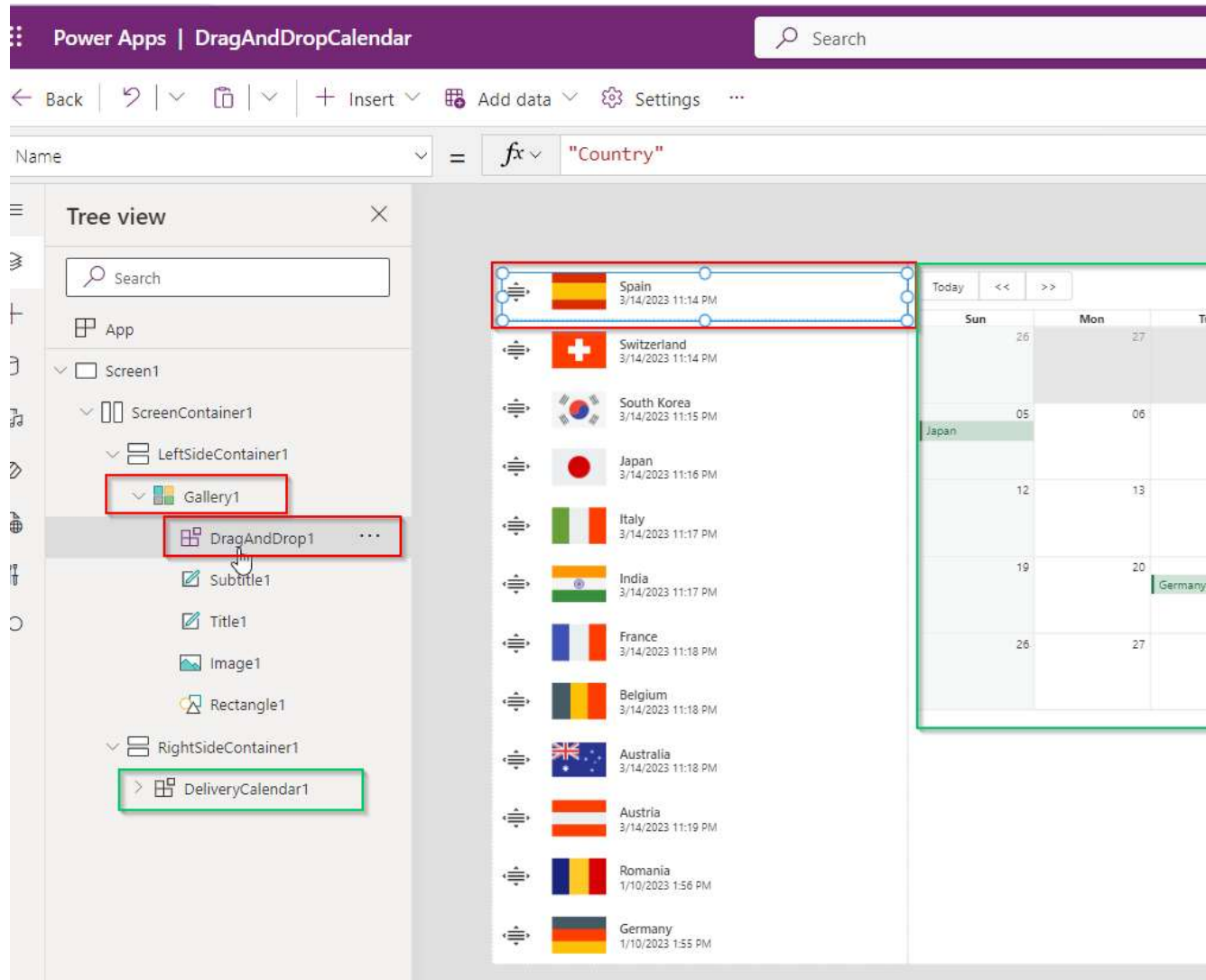
Power Apps is a suite of apps, services, connectors, and a data platform that provides a rapid application development environment.



What is a Power App?

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





Key Features

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



Quick Power Platform Overview

Power Platform Overview

Microsoft Power Platform is a suite of low-code/no-code tools that empowers users to build solutions, automate processes, analyse data, and create virtual agents.

Core Components:

- **Power Apps** – Build custom apps to digitize business processes.
- **Power Automate** – Automate workflows between apps and services.
- **Power BI** – Analyze data and share insights with interactive dashboards.
- **Power Pages** – Build secure, low-code business websites.
- **Power Virtual Agents** – Create intelligent chatbots without coding.



Types of Power Apps

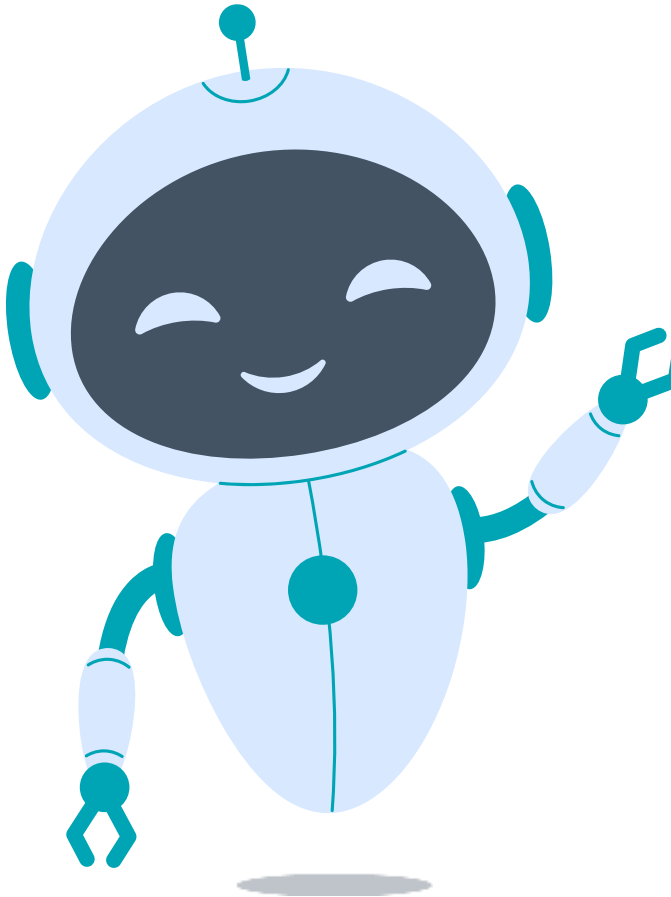
The 2 Main App Types of Power Apps



Canvas Apps

- **What it is:** Drag-and-drop app design with full control over the layout.
- **Best for:** Custom apps with a tailored UI, built from a blank canvas.
- **Features:**
 - Pixel-perfect design using PowerFX (low-code formulas).
 - Connect to 600+ data sources like SharePoint, SQL, Excel, and Dataverse.
 - Optimized for mobile, tablet, and desktop.
 - Great for task-based apps (e.g., inspections, approvals, data entry).

The 2 Main App Types of Power Apps



Model-Driven Apps

- **What it is:** App built on top of your data model in Microsoft Dataverse.
- **Best for:** Complex business processes with lots of relational data.
- **Features:**
 - Auto-generated UI based on your data and relationships.
 - Includes built-in forms, views, charts, and dashboards.
 - Responsive design by default (web and mobile friendly).
 - Ideal for scenarios like case management, sales processes, or CRM apps.

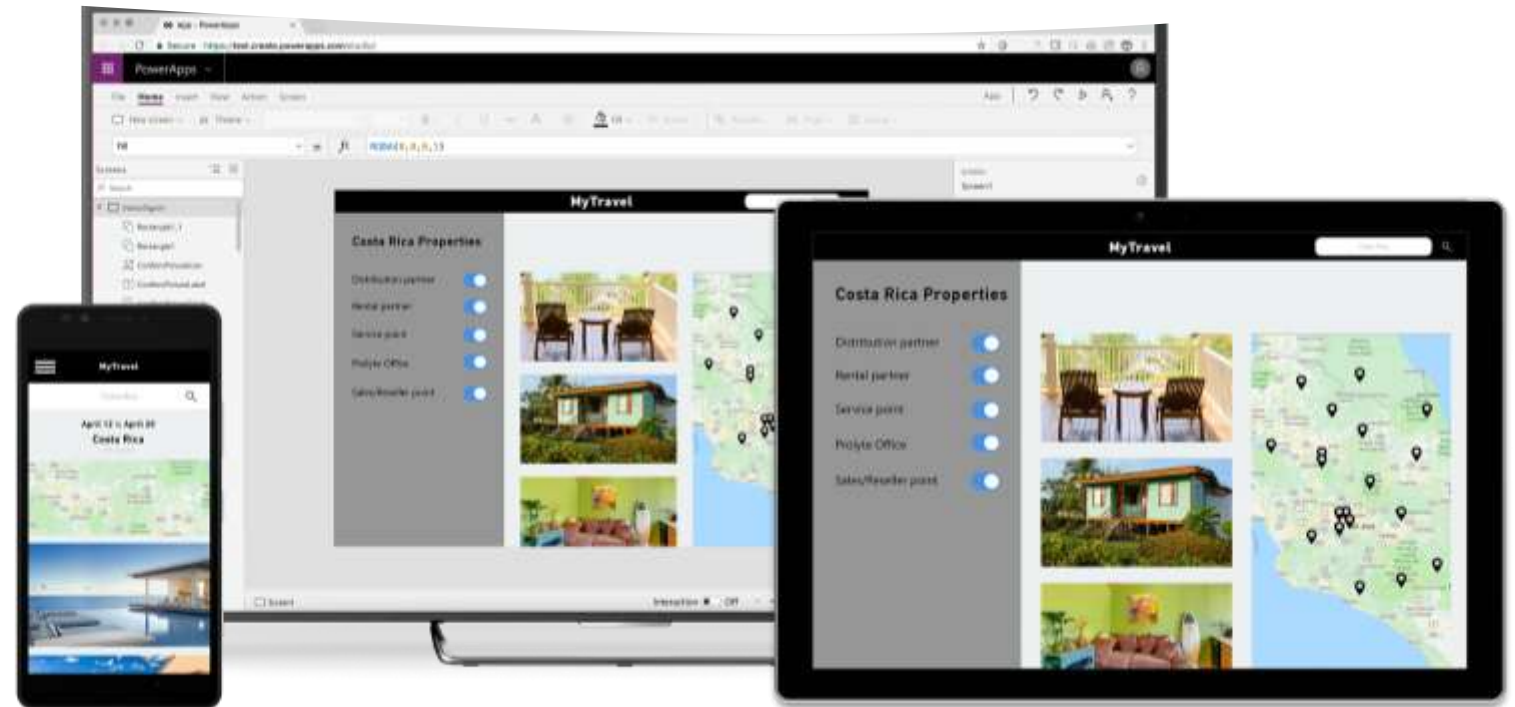


Power Apps: Canvas Apps

What is a Canvas App?

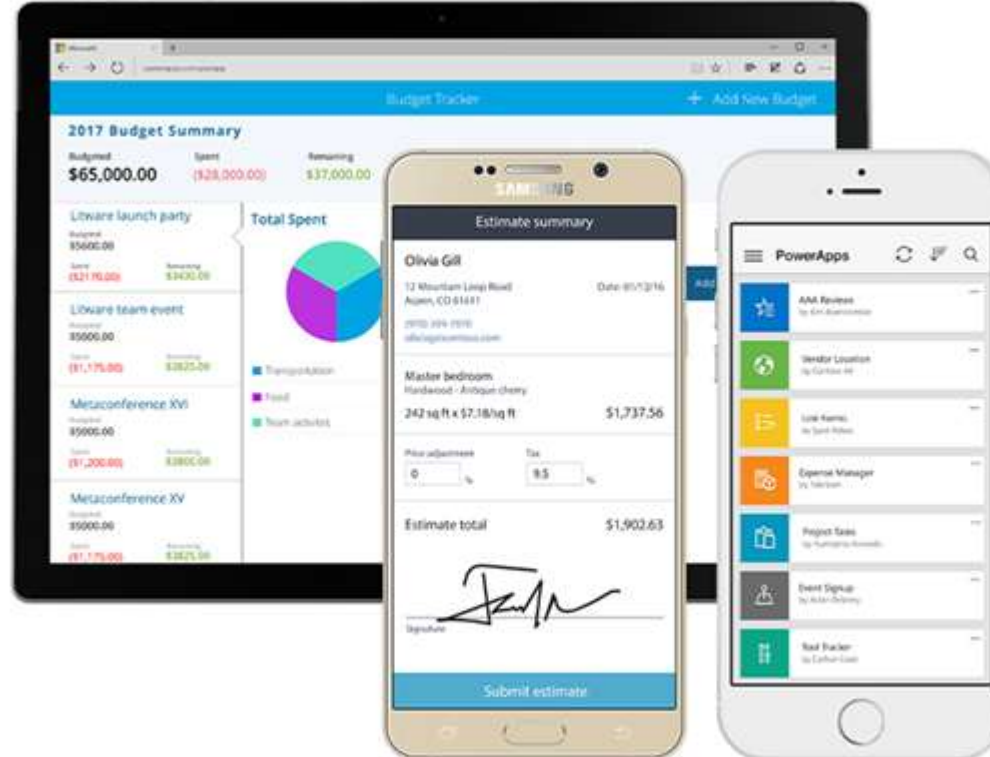
A **Canvas App** in Power Apps allows you to design and build apps from a blank canvas by dragging and dropping elements onto the screen.

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 can be used for...

- 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()".



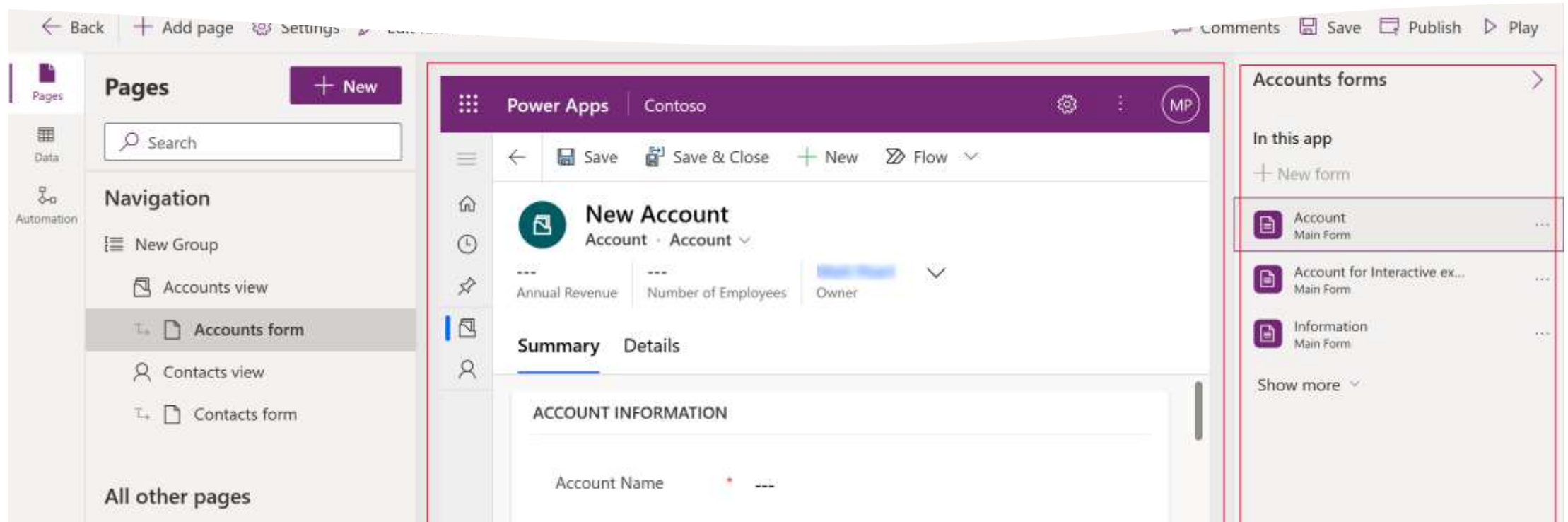


Power Apps: Model-Driven Apps

What is a Model-Driven App?

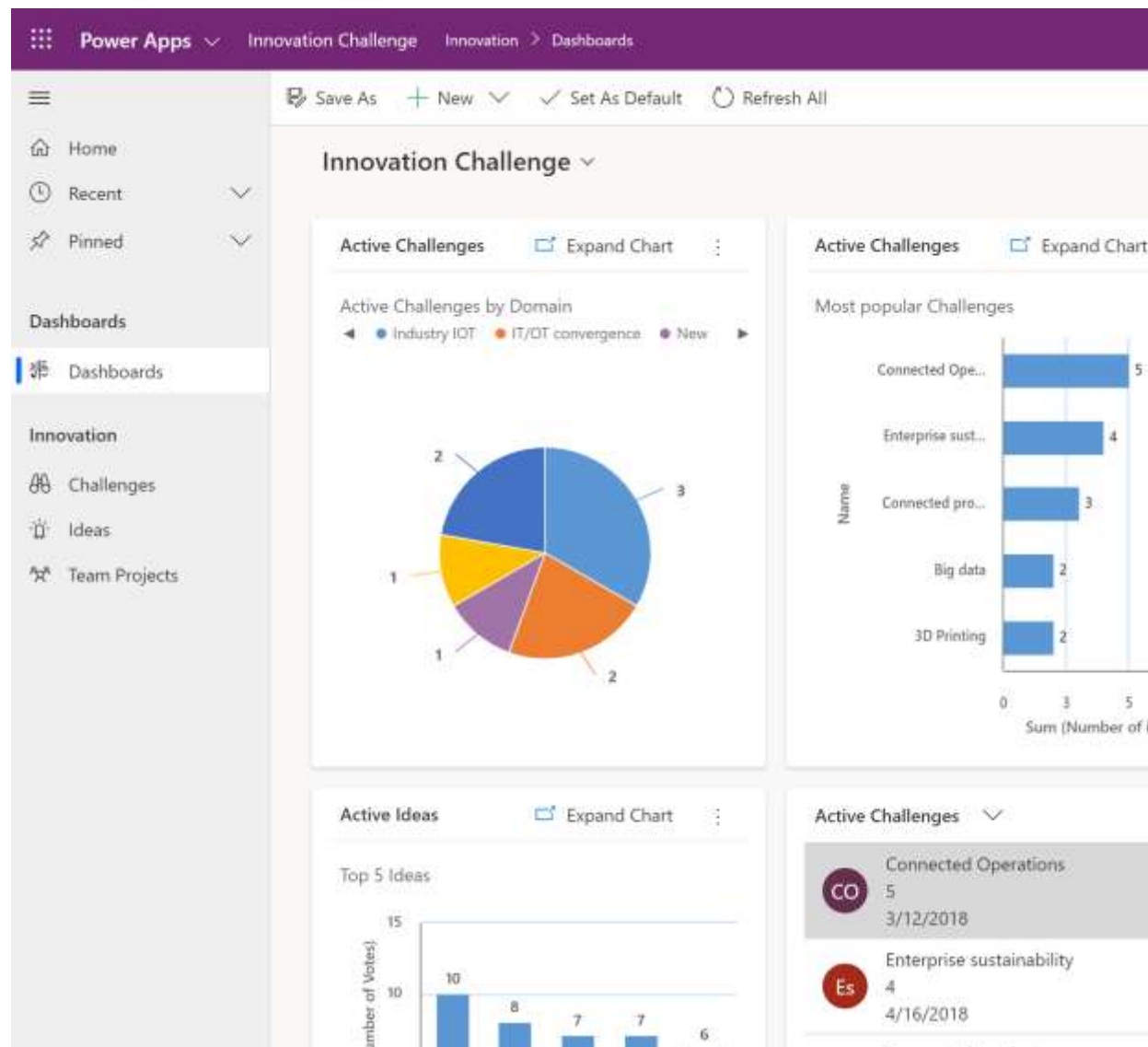
A **Model-Driven App** is built based on your data model in Microsoft Dataverse. Instead of focusing on the layout, you design the app around the relationships between the data entities, and the app generates the UI automatically.

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



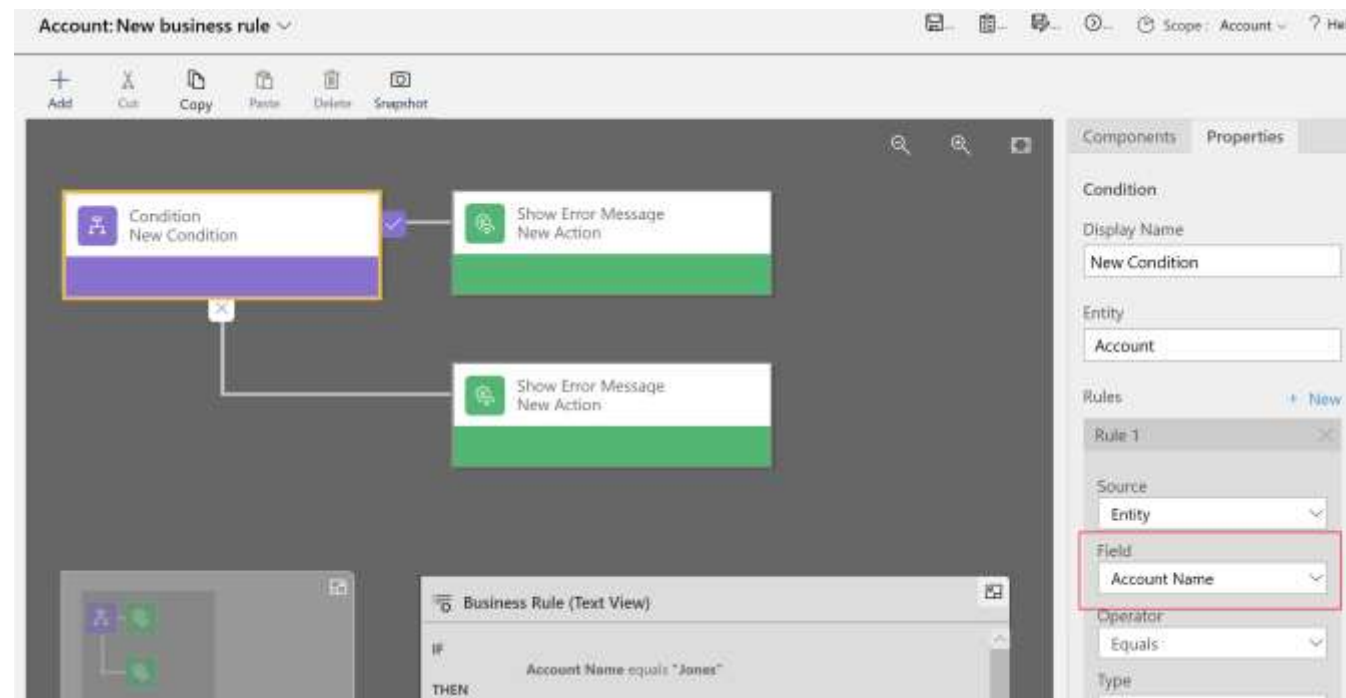
Model-Driven Apps

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.



Model-Driven Apps

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

The screenshot displays a Microsoft Power Apps interface for a 'Case Management' app. The top navigation bar includes 'Power Apps' and 'Case Management' tabs, along with standard app controls like search, add, filter, settings, and help. A left-hand navigation pane lists various app components: Home, Recent, Pinned, My work, Activities, Tasks, Customers (Accounts, Contacts), and Service (Cases, Queues). The main content area shows a 'Case - Saved' record with a 'Case' type. A Business Process Flow (BPF) is visible, consisting of five stages: 'Case with lots of info' (highlighted in red), 'New (< 1 Min)' (marked with a red bullseye), 'Investigating', 'Replace', and 'Problem Solved'. A modal window is open over the 'New (< 1 Min)' stage, titled 'Active for less than one minute'. This modal contains a 'General' tab with fields for 'Name' (labeled 'Case'), 'Description', 'Account', 'Contact', and 'Owner' (assigned to 'Ben'). It also includes a 'Next Stage' button with a right-pointing arrow. The background of the modal shows a list of related records with columns for Name, Description, Account, Contact, and Owner.

Model-Driven Apps

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

The screenshot shows the 'Example Workflow' configuration page in the Dynamics 365 Workflow Designer. The interface includes a top menu bar with options like 'File', 'Save and Close', 'Activate', and 'Convert to a real-time workflow'. The left sidebar shows a tree view with 'Common' (Information, Audit History, Solution Health Rules) and 'Process Sessions' (Process Sessions). The main area is divided into tabs: 'General', 'Administration', and 'Notes'. The 'General' tab is active, showing 'Hide Process Properties' with fields for 'Process Name' (Example Workflow), 'Activate As' (Process), 'Entity' (Social Media Account), and 'Category' (Workflow). Below these are 'Available to Run' options (Run in background, On-demand, Child process) and 'Workflow Job Retention' (Automatically delete completed jobs). The 'Options for Automatic Processes' section includes checkboxes for 'Record is created', 'Record status changes', 'Record is assigned', 'Record fields change', and 'Record is deleted'. At the bottom, a step configuration area shows a condition 'If Social Media Account:Followers > [1,000], then:' followed by two tasks: 'Add task' and 'Email', each with a 'Set Properties' button. The status at the bottom left is 'Status: Draft'.

File | Save and Close | Activate | Convert to a real-time workflow | Show Dependencies | Solution Layers | Actions | Help

Process: Example Workflow | Working on solution: PL-200

Information

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Common

- Information
- Audit History
- Solution Health Rules
- Solution Health Rules

Process Sessions

- Process Sessions

General | Administration | Notes

Hide Process Properties

Process Name * | Example Workflow

Activate As | Process

Entity | Social Media Account

Category | Workflow

Available to Run

- ☒ Run this workflow in the background (recommended)
- ☒ As an on-demand process
- ☒ As a child process

Workflow Job Retention

- ☒ Automatically delete completed workflow jobs (to save disk space)

Options for Automatic Processes

Scope | Organization

Start when:

- ☒ Record is created
- ☐ Record status changes
- ☐ Record is assigned
- ☒ Record fields change | Select
- ☐ Record is deleted

Add Step | Insert | Delete this step.

▼ Follower Count

If Social Media Account:Followers > [1,000], then:

- Add task | Create: Task | Set Properties
- Email | Send email: Create New Message | Set Properties

Status: Draft



Power App Examples



Canvas App – Retro Stop Kit (Business Central)

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's a user selection dropdown showing 'USER1' and a date field set to '10/10/2024', accompanied by a 'Refresh Data' button. The 'Count Location' is set to 'MAIN'. A table for data entry is visible, with a header row containing '70100', a dropdown, 'Qty Collected', 'Qty Delivered', and an '+ Add' button. The table body is currently empty. At the bottom, there are three buttons: 'Submit Data' (green), 'Cancel' (red), and 'Clear Data' (yellow).

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 Canvas App interface. At the top left is the 'RETRO STOP' logo. Below it, there is a user selection dropdown showing 'USER1' and a date field set to '10/10/2024'. A green 'Refresh Data' button is positioned to the right of the date field. Underneath, the 'Count Location' is set to 'MAIN' via a dropdown menu. Below this, there is a table with two columns: 'Qty Collected' and 'Qty Delivered'. The first row of the table has a value of '70100' in the 'Qty Collected' column. To the right of the table are a blue '+ Add' button and a red trash icon. At the bottom of the app, 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 Canvas App interface. At the top left is the 'RETRO STOP' logo. Below it, there's a user selection dropdown showing 'USER1', a date field set to '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, an '+ Add' button, and a trash icon. The first three rows have pre-filled values: Row 1 (70100, 10, 12), Row 2 (70101, 9, 10), and Row 3 (70102, 10, 13). The fourth row has dropdowns for '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.

ID	Value 1	Value 2	Action
70100	10	12	+ Add
70101	9	10	+ Add
70102	10	13	+ Add
70100	Qty Collected	Qty Delivered	+ Add

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.

The screenshot displays the Canvas App Retro Stop Kit Application interface. At the top, a green banner indicates "Data Successfully Submitted to Business Central! Sales Order Number: 1011". Below this, the app shows a "Count Location" dropdown menu set to "MAIN". A table with columns "Qty Collected" and "Qty Delivered" is visible, with a "+ Add" button and a trash icon. At the bottom, there are three buttons: "Submit Data" (green), "Cancel" (red), and "Clear Data" (yellow).

Count Location	Qty Collected	Qty Delivered
MAIN		

Canvas App – Retro Stop Kit Application

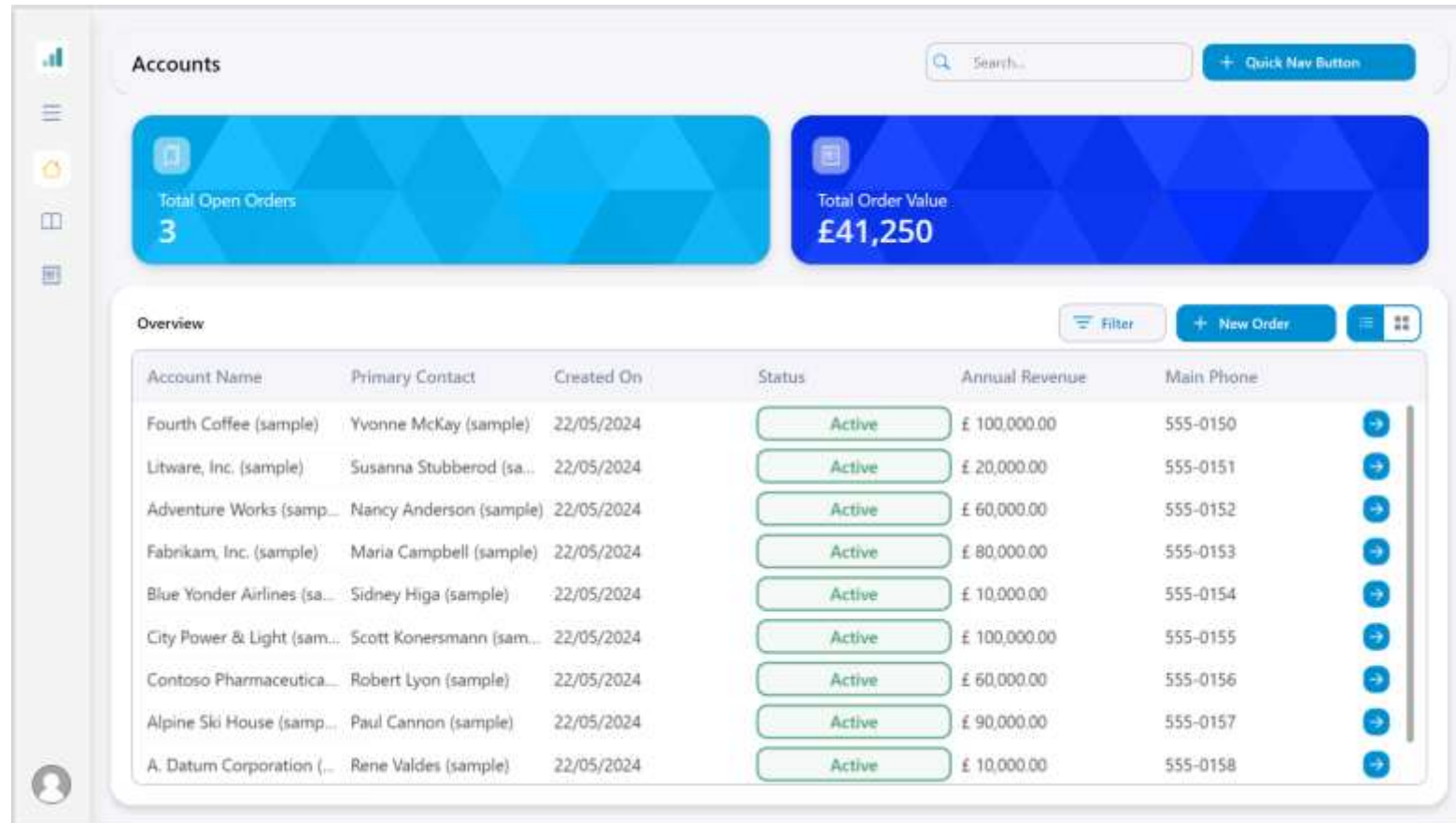
We can see the API message with a successful response of a sales order creation

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}



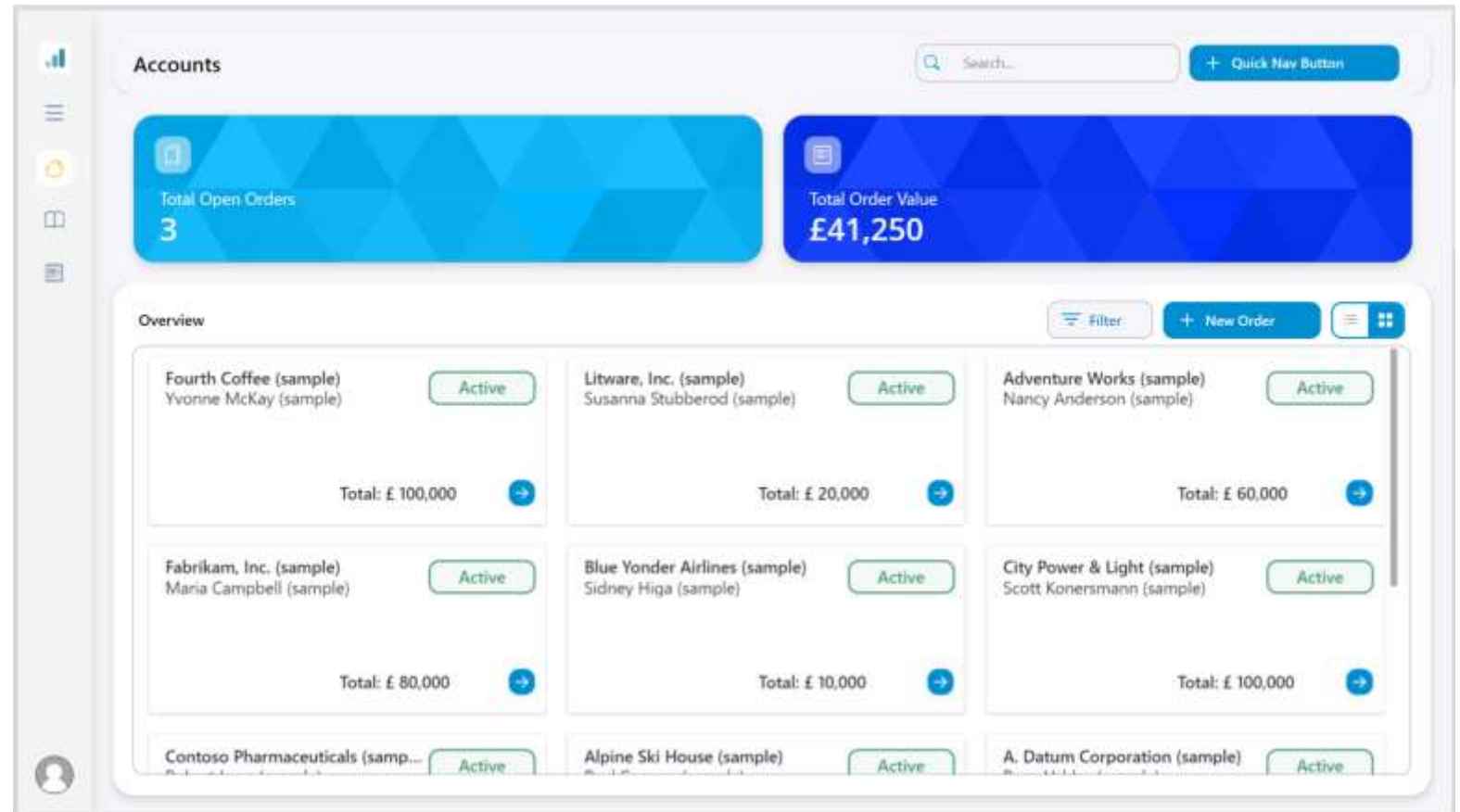
Canvas App – Sales Dashboard (Dataverse & Business Central)

Canvas App – Sales Dashboard App



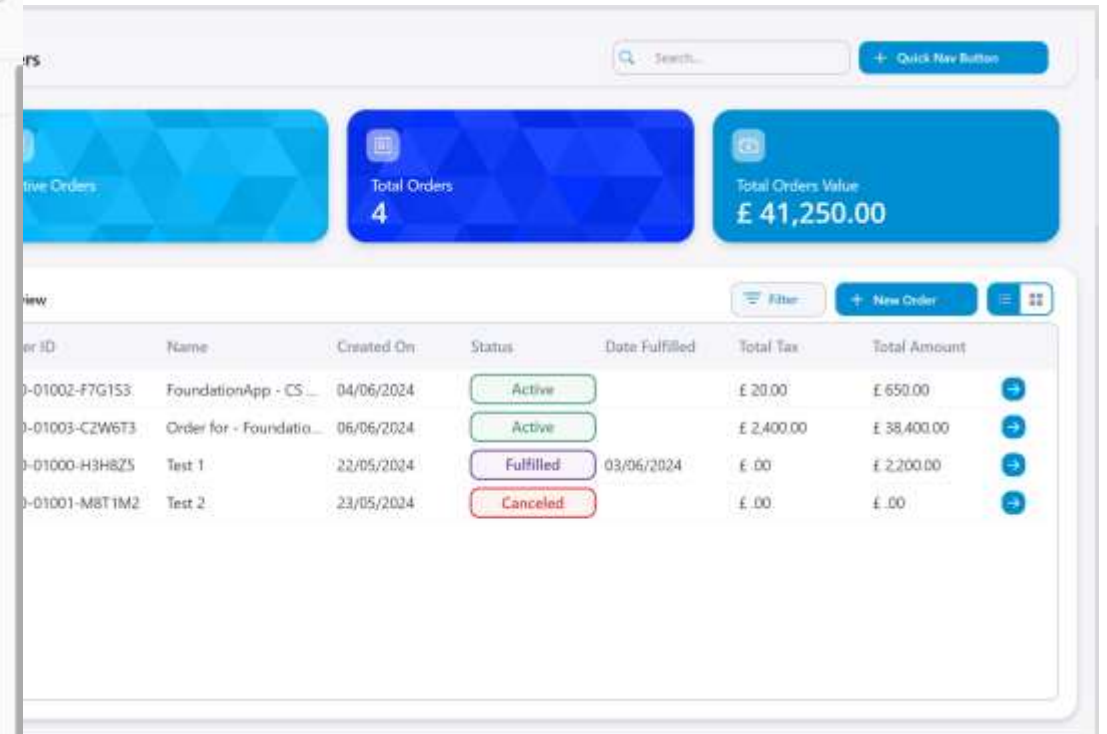
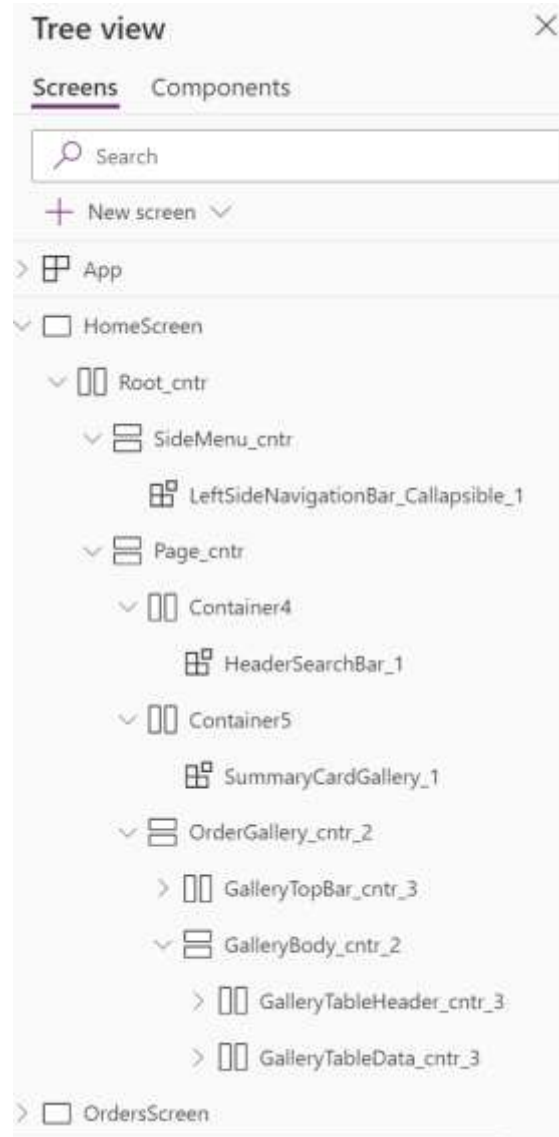
Canvas App – Sales Dashboard App

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



Canvas App – Sales Dashboard App

Responsive screens built upon a container structure



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

SecondaryColour

PrimaryTextColour

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

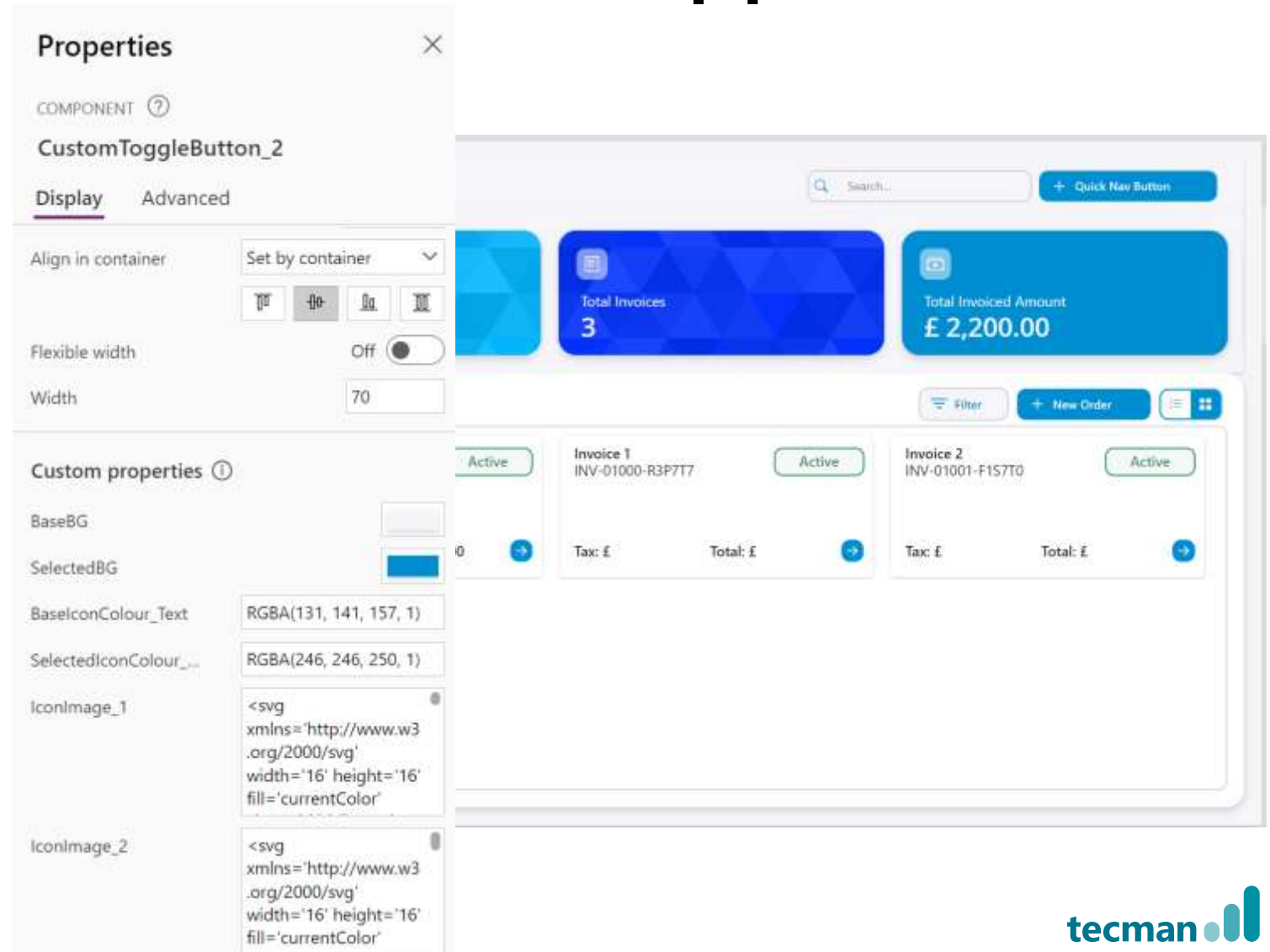
£ 2,200.00

CardValue_4

400

Canvas App – Sales Dashboard App

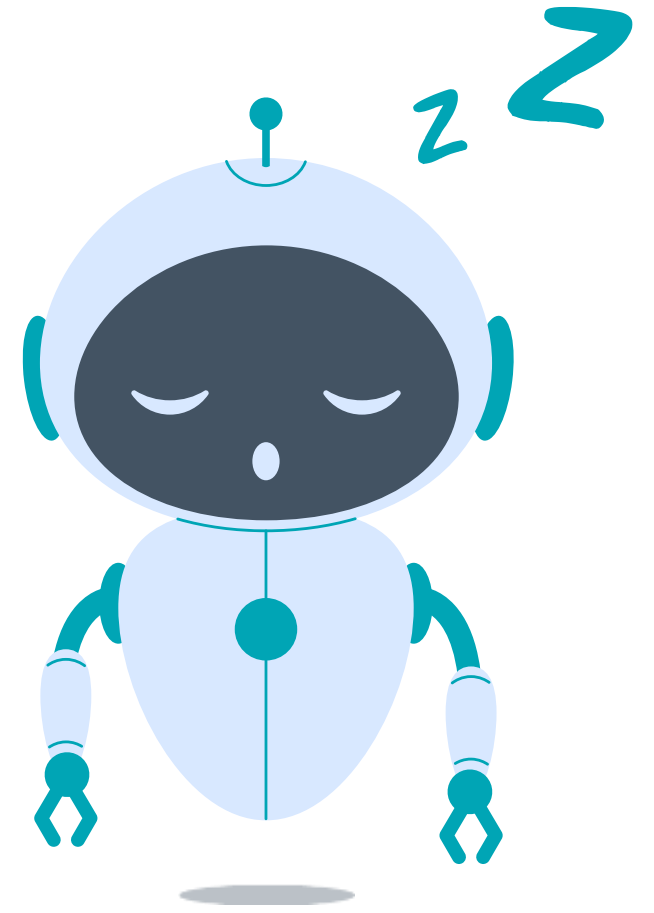
Customisable components and buttons using the component library



Get to the good Stuff!

Let's have a look as some demo examples:

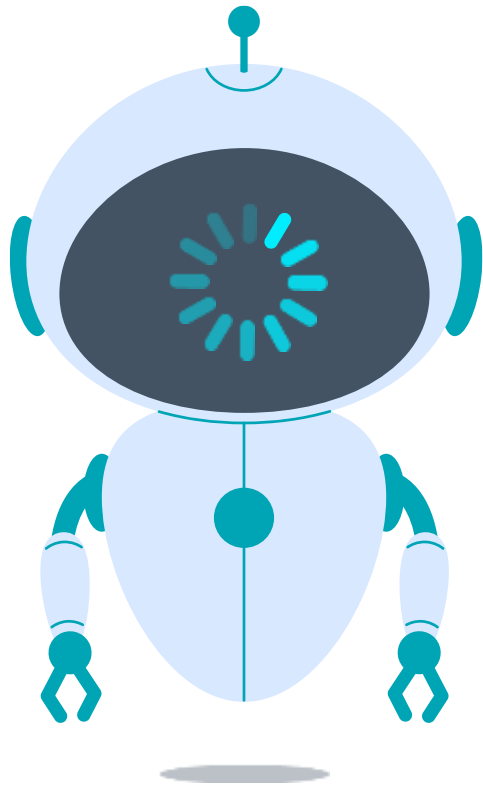
1. Retro Stop App
2. Sales Dashboard App
3. Non Conformance





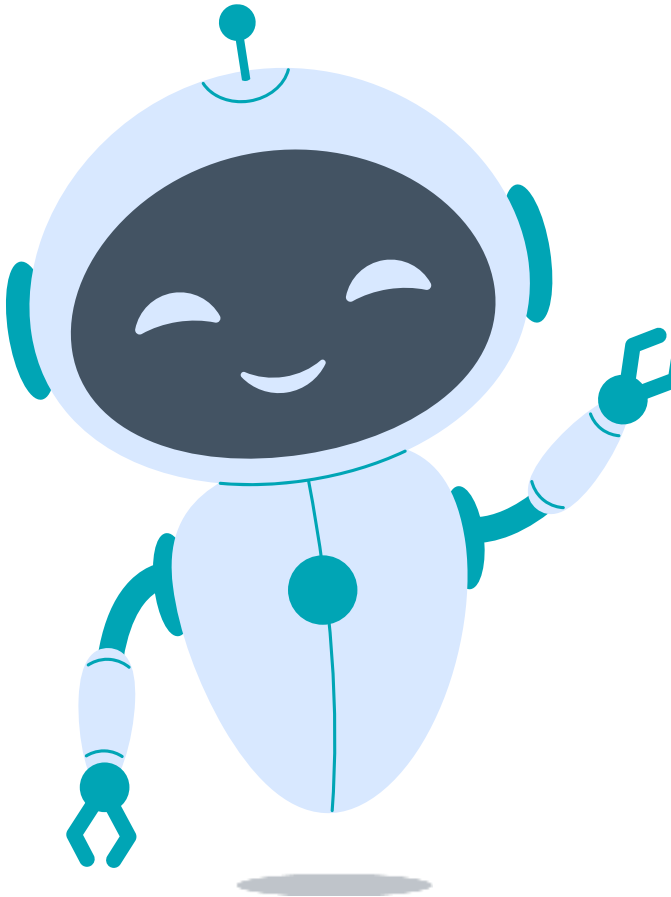
DEMO TIME

What we covered



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

Apps we've built



Packing App
Engineer front end apps
Sale Order Processing
Transfer Orders, Inventory management
Tradeshow App
Outreach Worker App (Case Logging)



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!



CRM

connect

THURSDAY 15th MAY 2025

