Getting started with the Power Platform

Malin Martnes

- CEO at MaCoTra
- Business Applications MVP (2019-)
- Microsoft Certified Trainer (MCT) (2020-)

- Laugh often and too loud
- Love the community
- Obsessive Liverpool-fan

MaCoTra

@MalinMartnes
https://malindonosomartnes.com

Copilot free session

Microsoft Power Platform

Power Apps

Power Automate

Power BI

Power Virtual Agents

Power Pages

Data connectors

AI Builder

Dataverse

Power FX

Managed Environments

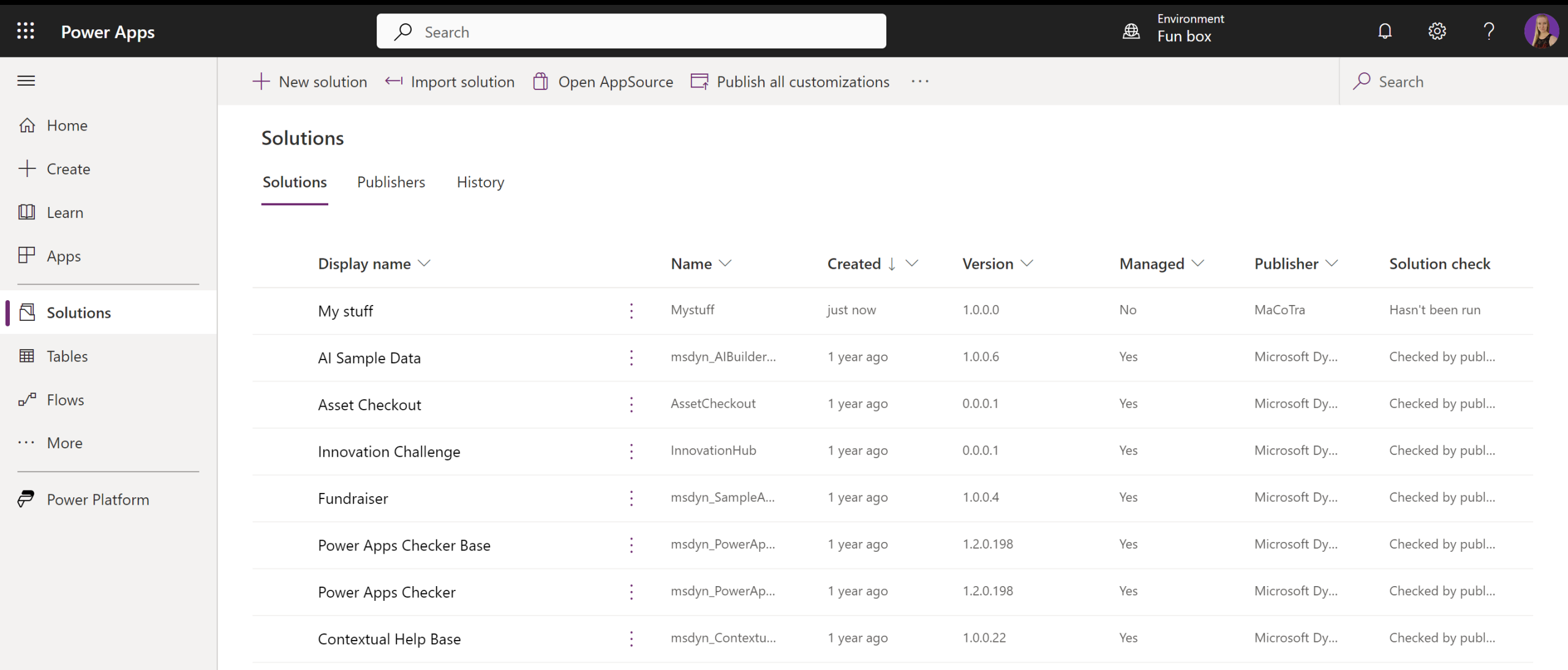
Dataverse

Secure relational database

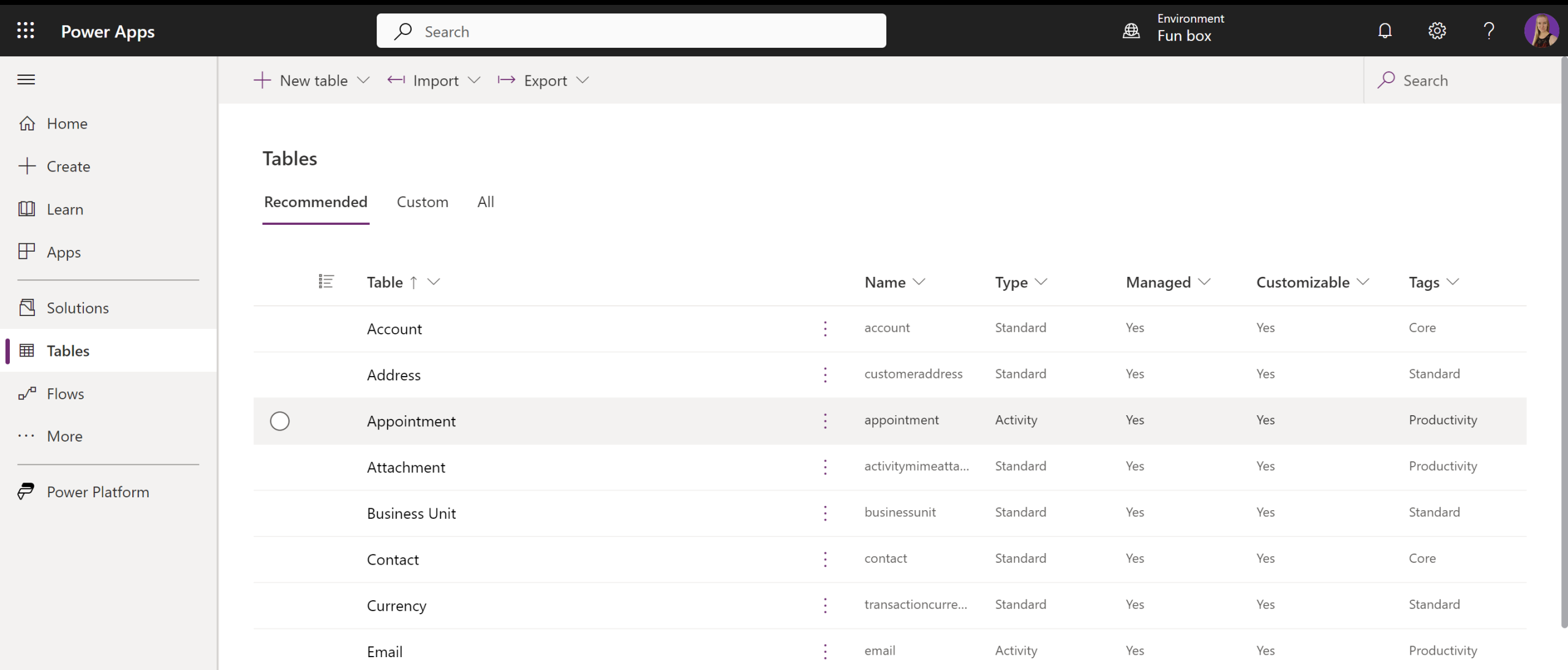
Put all your data to work with Dataverse

- Standardized data model with;
  - Business logic
  - Security
  - Built-in integration
- Seamless integration with;
  - Dynamics 365
  - Office 365
  - Azure

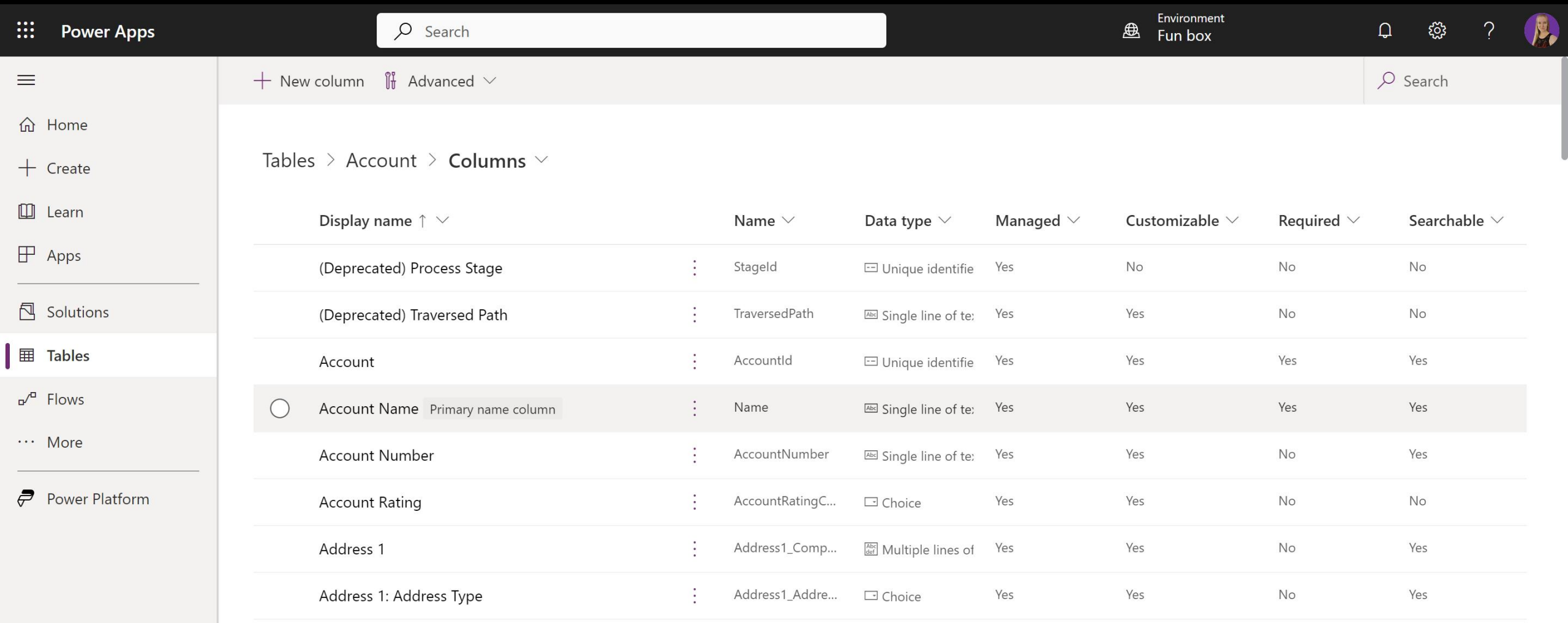
Solutions


Power Apps
Search
Environment
Fun box
New solution
Import solution
Open AppSource
Publish all customizations
Search
Home
Create
Learn
Apps
Solutions
Tables
Flows
More
Power Platform
Solutions
Solutions
Publishers
History
Display name
Name
Created
Version
Managed
Publisher
Solution check
My stuff
Mystuff
just now
1.0.0.0
No
MaCoTra
Hasn't been run
AI Sample Data
msdyn_AIBuilder...
1 year ago
1.0.0.6
Yes
Microsoft Dy...
Checked by publ...
Asset Checkout
AssetCheckout
1 year ago
0.0.0.1
Yes
Microsoft Dy...
Checked by publ...
Innovation Challenge
InnovationHub
1 year ago
0.0.0.1
Yes
Microsoft Dy...
Checked by publ...
Fundraiser
msdyn_SampleA...
1 year ago
1.0.0.4
Yes
Microsoft Dy...
Checked by publ...
Power Apps Checker Base
msdyn_PowerAp...
1 year ago
1.2.0.198
Yes
Microsoft Dy...
Checked by publ...
Power Apps Checker
msdyn_PowerAp...
1 year ago
1.2.0.198
Yes
Microsoft Dy...
Checked by publ...
Contextual Help Base
msdyn_Contextu...
1 year ago
1.0.0.22
Yes
Microsoft Dy...
Checked by publ...

Tables


Power Apps
Search
Environment
Fun box
New table
Import
Export
Search
Home
Create
Learn
Apps
Solutions
Tables
Flows
More
Power Platform
Tables
Recommended
Custom
All
Table
Name
Type
Managed
Customizable
Tags
Account account Standard Yes Yes Core
Address customeraddress Standard Yes Yes Standard
Appointment appointment Activity Yes Yes Productivity
Attachment activitymimeatta... Standard Yes Yes Productivity
Business Unit businessunit Standard Yes Yes Standard
Contact contact Standard Yes Yes Core
Currency transactioncurre... Standard Yes Yes Standard
Email email Activity Yes Yes Productivity

Columns


Power Apps
Search
Environment
Fun box
New column
Advanced
Search
Home
Create
Learn
Apps
Solutions
Tables
Flows
More
Power Platform
Tables > Account > Columns
Display name
Name
Data type
Managed
Customizable
Required
Searchable
(Deprecated) Process Stage StageId Unique identifie Yes No No No
(Deprecated) Traversed Path TraversedPath Single line of te: Yes Yes No No
Account AccountId Unique identifie Yes Yes Yes Yes
Account Name Primary name column Name Single line of te: Yes Yes Yes Yes
Account Number AccountNumber Single line of te: Yes Yes No Yes
Account Rating AccountRatingC... Choice Yes Yes No No
Address 1 Address1_Comp... Multiple lines of Yes Yes No Yes
Address 1: Address Type Address1_Addre... Choice Yes Yes No Yes

Power Apps

Create functional applications

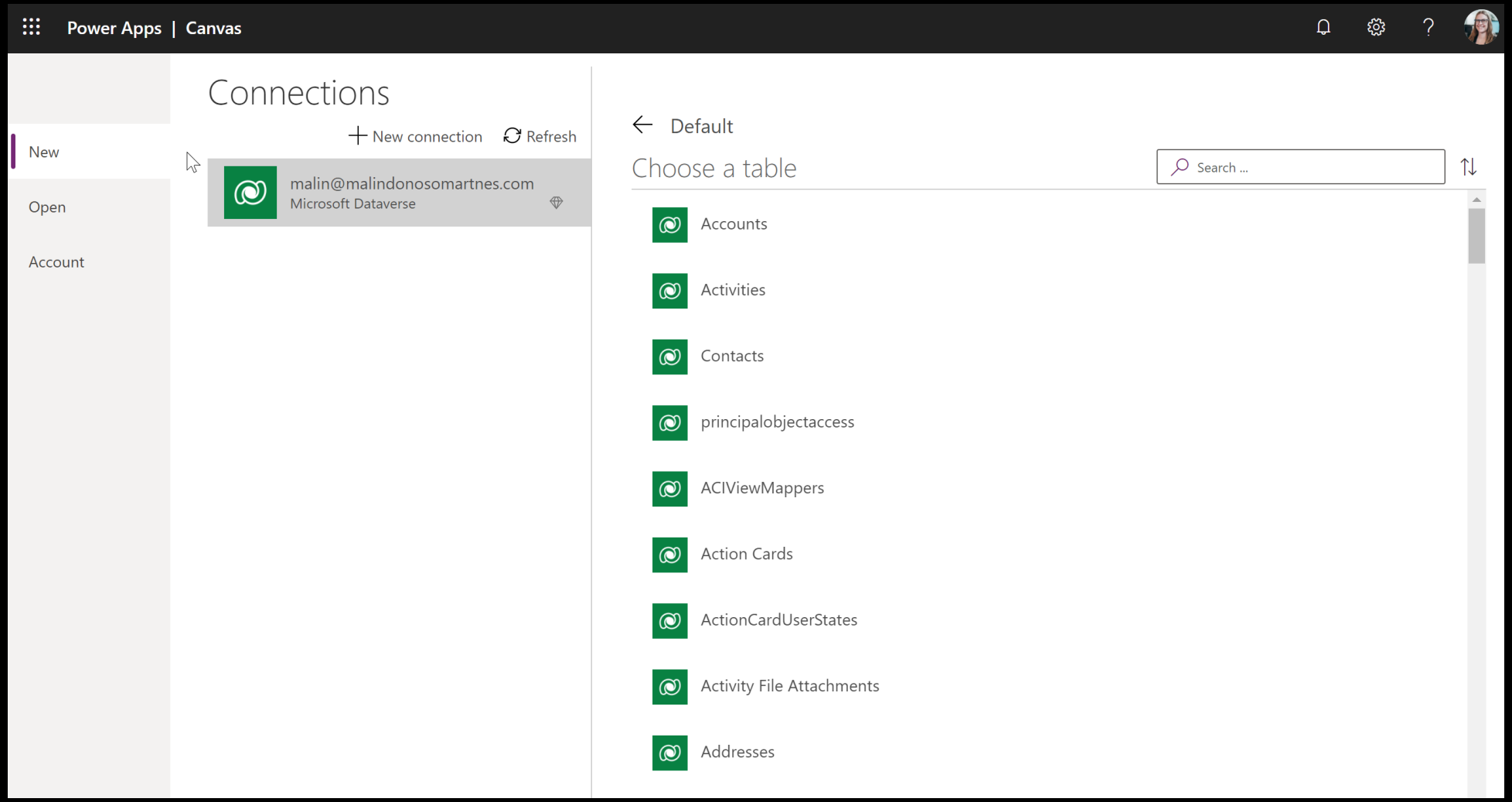
2 types of Power Apps

Canvas	**Model driven**
Design	Is what it is
Multiple sources	Dataverse
Power Fx	No code required

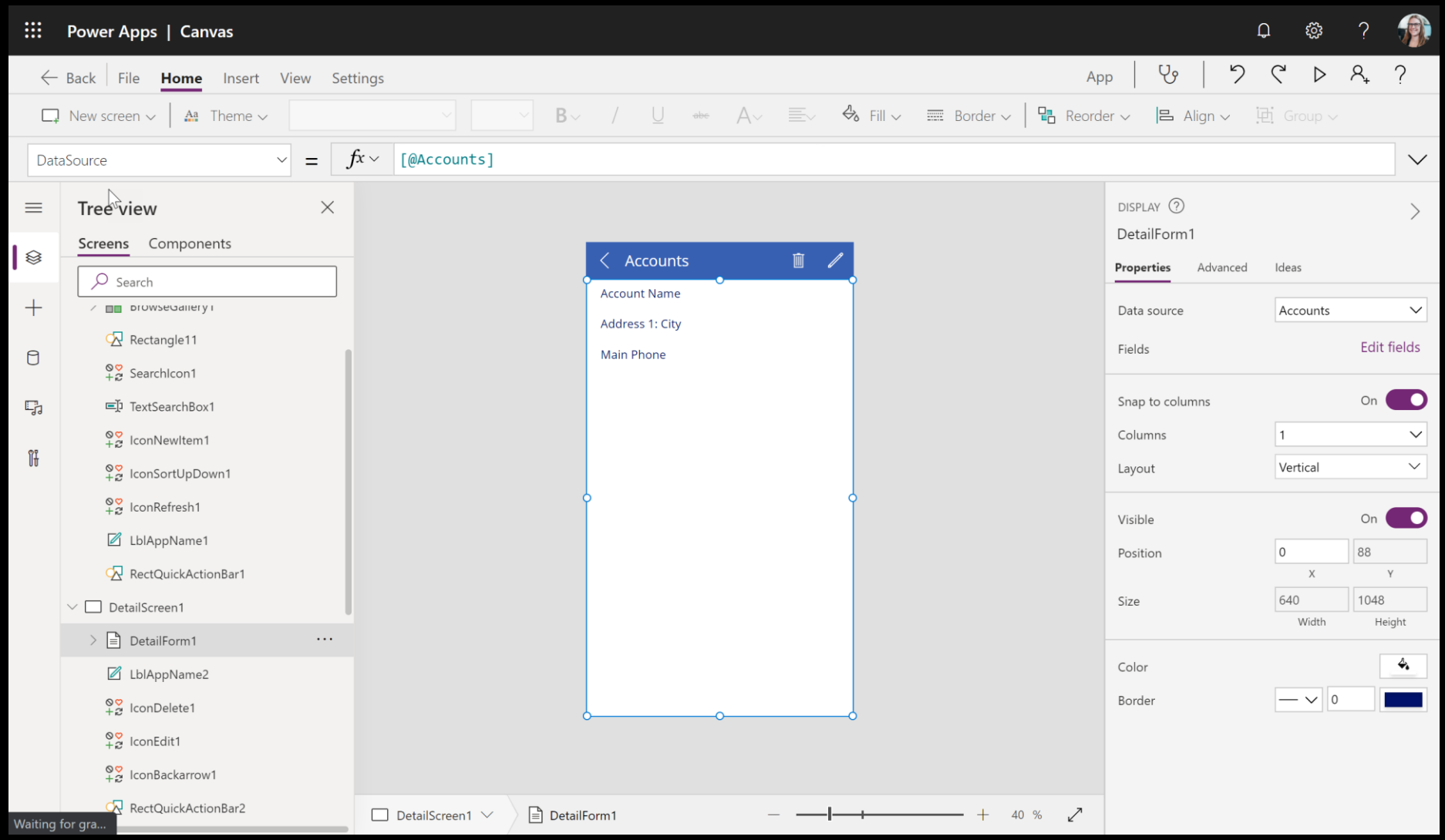
Canvas

- From blank
- From data
- From template

From data


Power Apps | Canvas
Connections
New connection
Refresh
New
Open
Account
malin@malindonosomartnes.com
Microsoft Dataverse
Default
Choose a table
Search ...
Accounts
Activities
Contacts
principalobjectaccess
ACIViewMappers
Action Cards
ActionCardUserStates
Activity File Attachments
Addresses

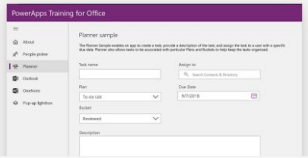
From data


Power Apps | Canvas
Back
File
Home
Insert
View
Settings
App
New screen
Theme
Fill
Border
Reorder
Align
Group
DataSource
=
[@Accounts]
Tree view
Screens
Components
Search
Rectangle11
SearchIcon1
TextSearchBox1
IconNewItem1
IconSortUpDown1
IconRefresh1
LblAppName1
RectQuickActionBar1
DetailScreen1
DetailForm1
LblAppName2
IconDelete1
IconEdit1
IconBackarrow1
RectQuickActionBar2
Waiting for gra...
Accounts
Account Name
Address 1: City
Main Phone
DetailScreen1
DetailForm1
40 %
DISPLAY
DetailForm1
Properties
Advanced
Ideas
Data source
Accounts
Fields
Edit fields
Snap to columns
On
Columns
1
Layout
Vertical
Visible
On
Position
0
88
X
Y
Size
640
1048
Width
Height
Color
Border
0

From template

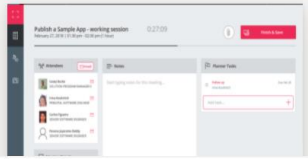
Start from template

All | Office



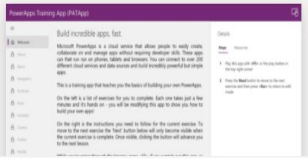
Power Apps Training for Office

Canvas app



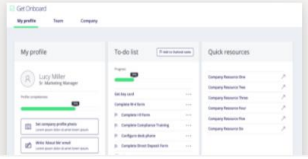
Meeting Capture

Canvas app



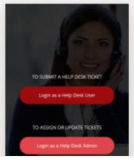
Power Apps Training

Canvas app



Onboarding Tasks

Canvas app

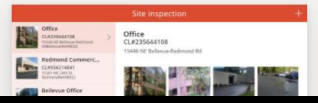


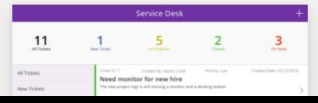
Help Desk

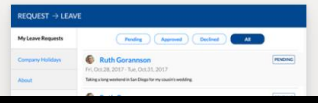
Canvas app

Budget Tracker

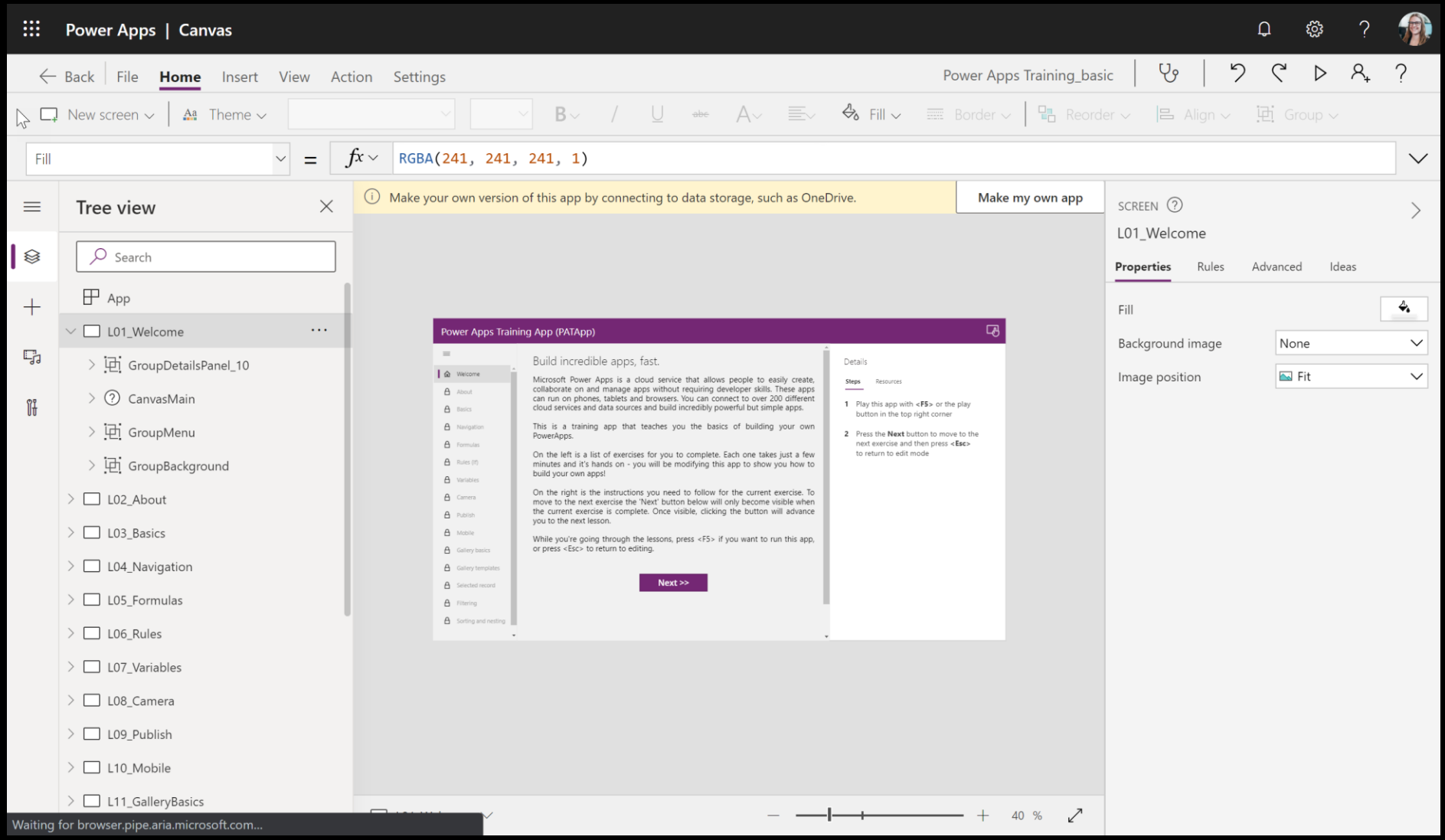
Canvas app







From template



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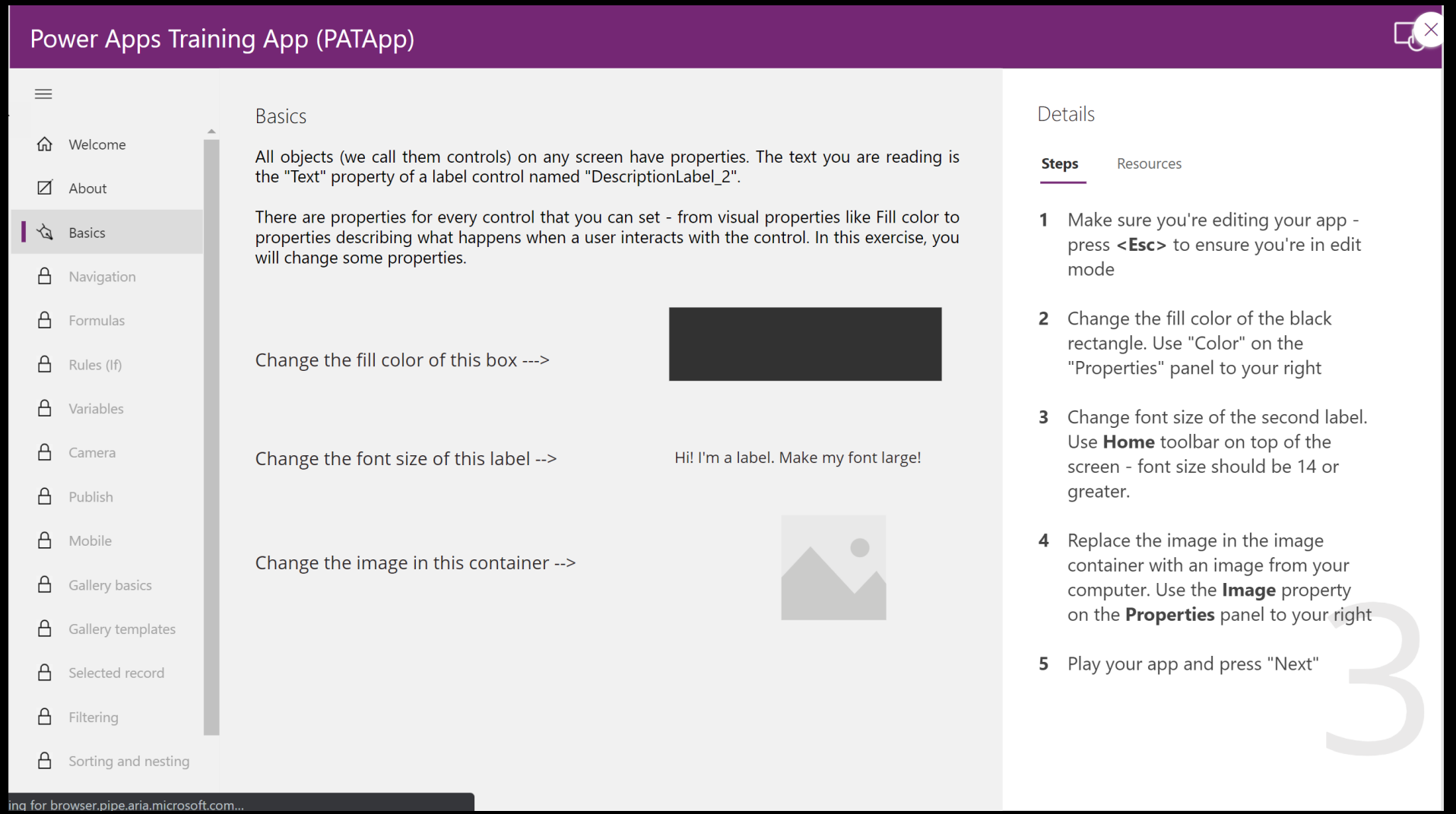
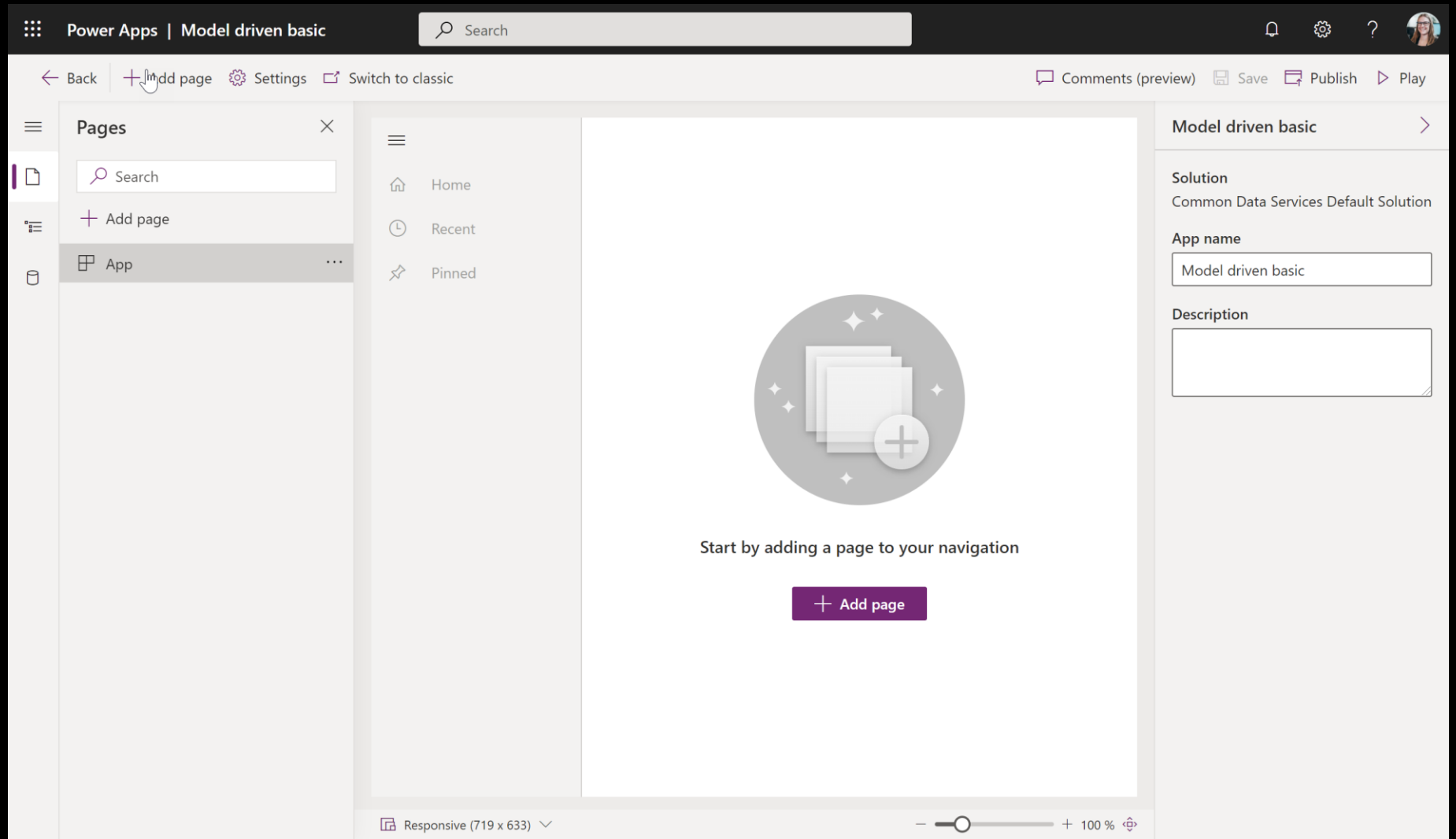


Model driven

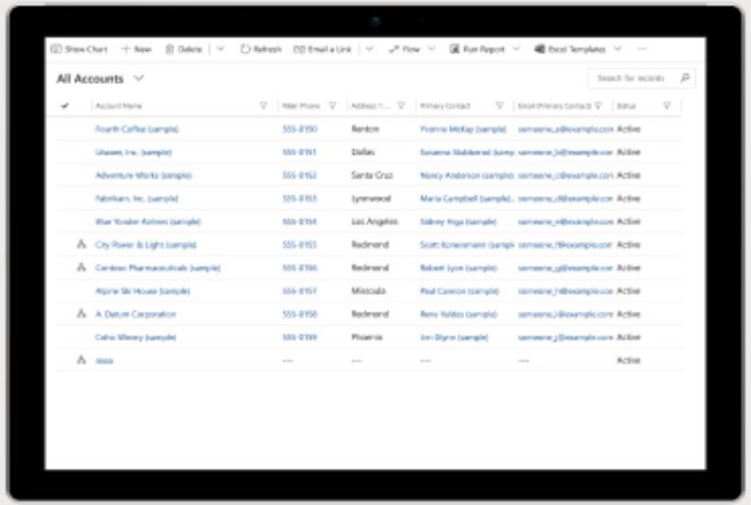
- From blank
- From template
- Dynamics 365

From blank


Power Apps | Model driven basic
Search
Back
Add page
Settings
Switch to classic
Comments (preview)
Save
Publish
Play
Pages
Search
Add page
App
Home
Recent
Pinned
Start by adding a page to your navigation
Add page
Model driven basic
Solution
Common Data Services Default Solution
App name
Model driven basic
Description
Responsive (719 x 633)
100 %

From blank

Add table view and form pages



Display records of a data table in a full-page list view. Creating a data view page also adds an associated form page for viewing and editing data on a selected record.

Select one or more tables

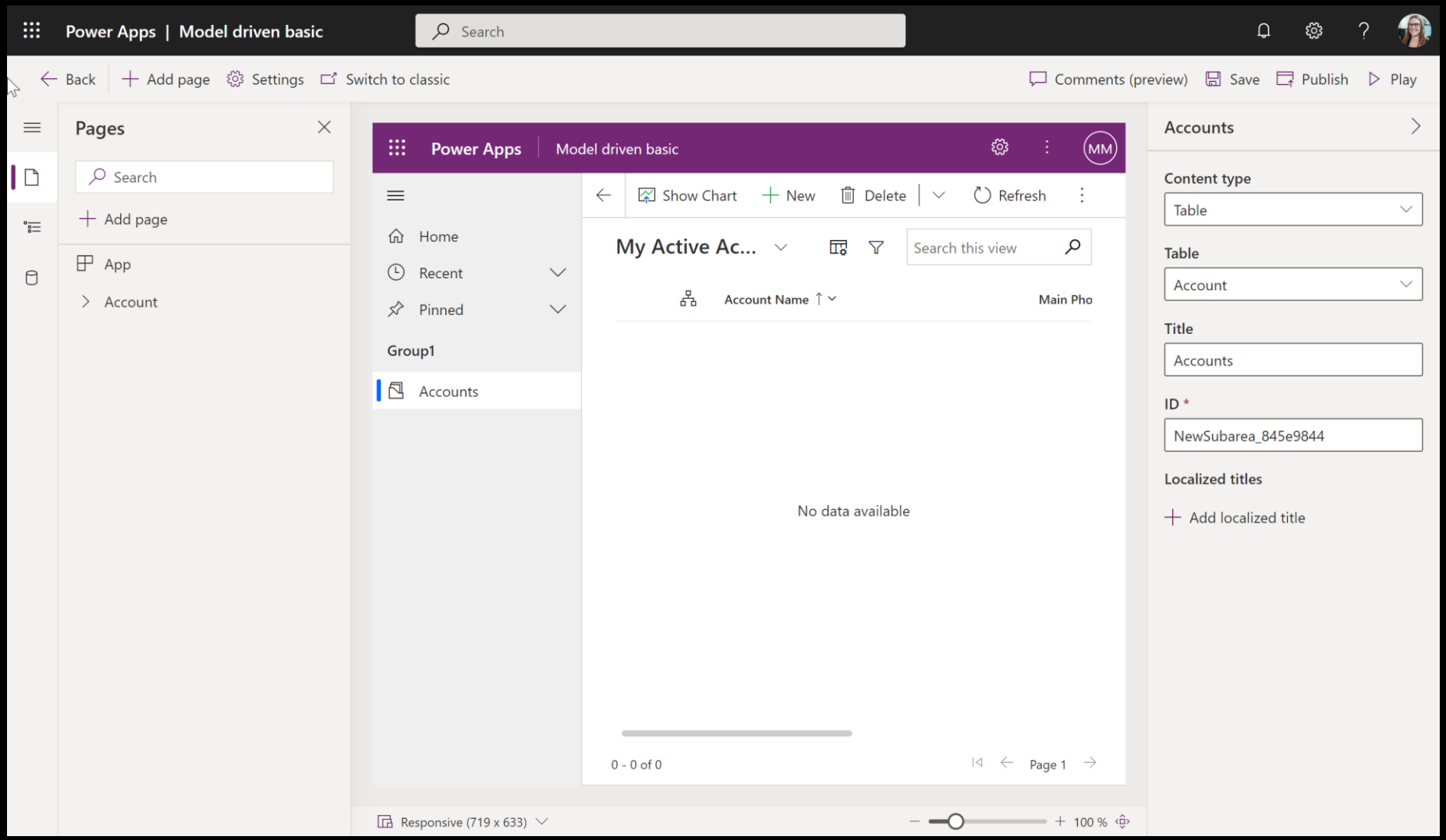
Search

- [x] Account
- [ ] Action Card
- [ ] Activity
- [ ] Activity File Attachment
- [ ] Address
- [ ] AI Builder Dataset
- [ ] AI Builder Dataset File
- [ ] AI Builder Dataset Record
- [ ] AI Builder Datasets Container
- [ ] AI Builder File
- [ ] AI Builder File Attached Data

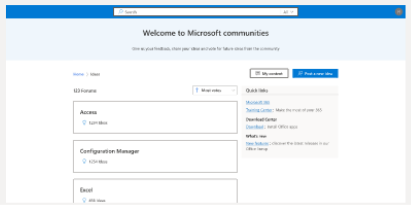
- [x] Show in navigation

Add | Cancel

From blank


Power Apps | Model driven basic
Search
Back
Add page
Settings
Switch to classic
Comments (preview)
Save
Publish
Play
Pages
Search
Add page
App
Account
Power Apps
Model driven basic
MM
Show Chart
New
Delete
Refresh
Home
Recent
Pinned
Group1
Accounts
My Active Ac...
Search this view
Account Name
Main Pho
No data available
0 - 0 of 0
Page 1
Accounts
Content type
Table
Table
Account
Title
Accounts
ID *
NewSubarea_845e9844
Localized titles
Add localized title
Responsive (719 x 633)
100 %

From template

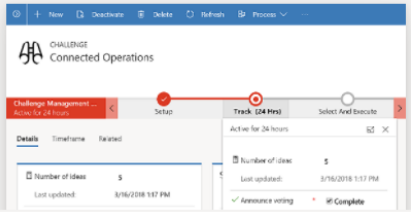


Modern Community (Preview)

Portal

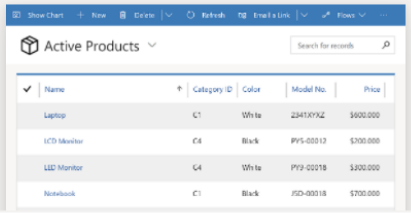
Fundraiser

Model-driven app



Innovation Challenge

Model-driven app

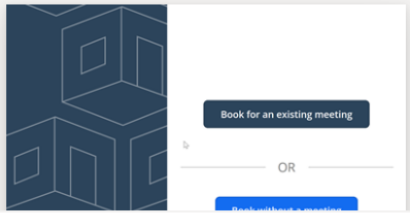


Asset Checkout

Model-driven app

Shoutouts

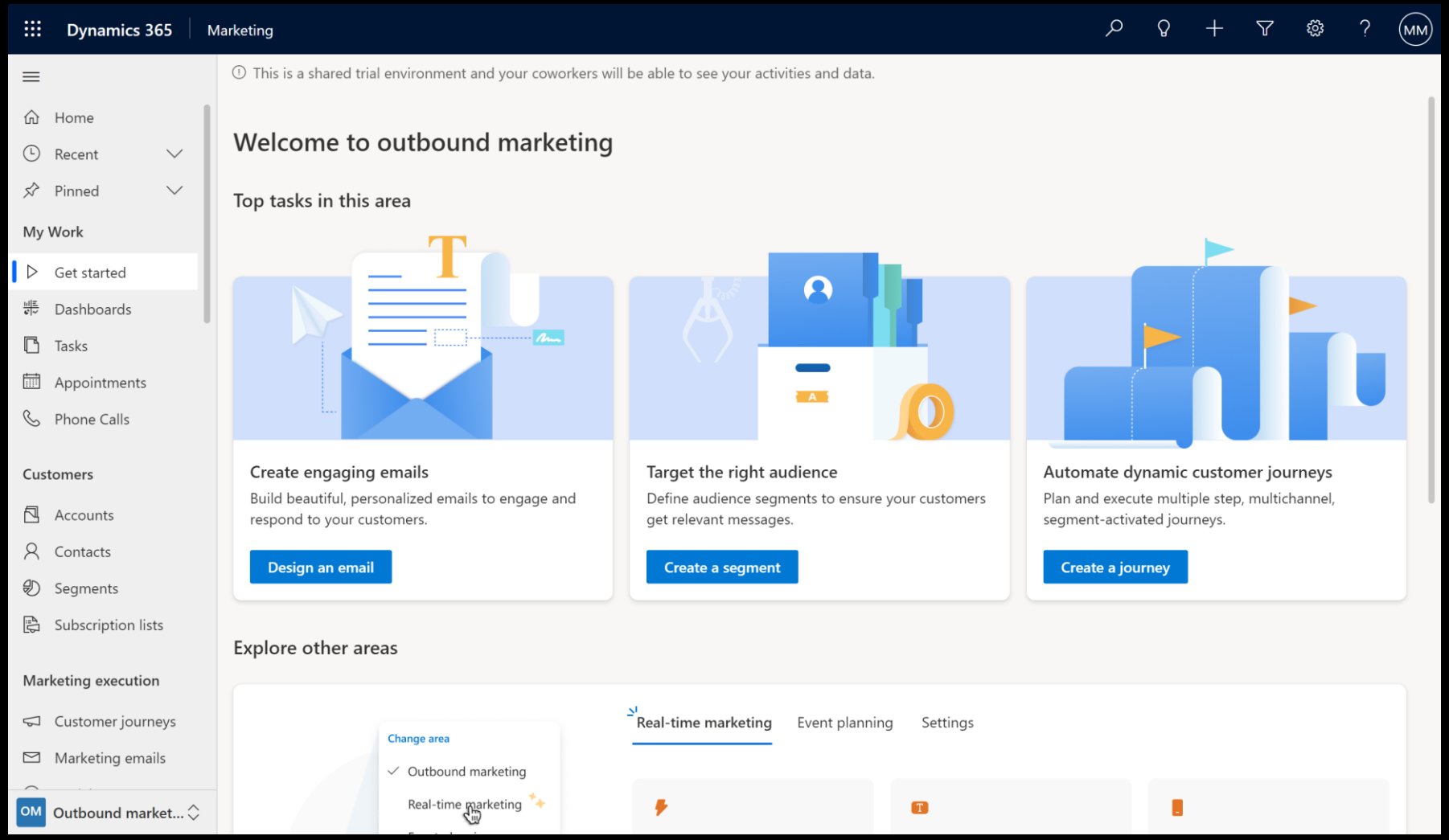
Canvas app



Book A Room

Canvas app

Dynamics 365



Power Automate

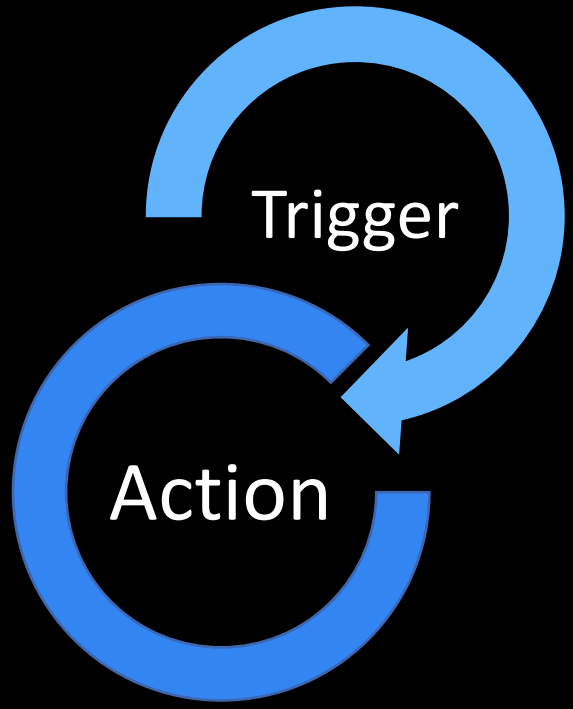
Automate and model business processes across your apps and services

Trigger actions, grant approvals,
and get notifications

From simple automations to advanced scenarios with branches, loops, and more

Automate legacy, on-prem and cloud-based applications and services

Components of a Flow



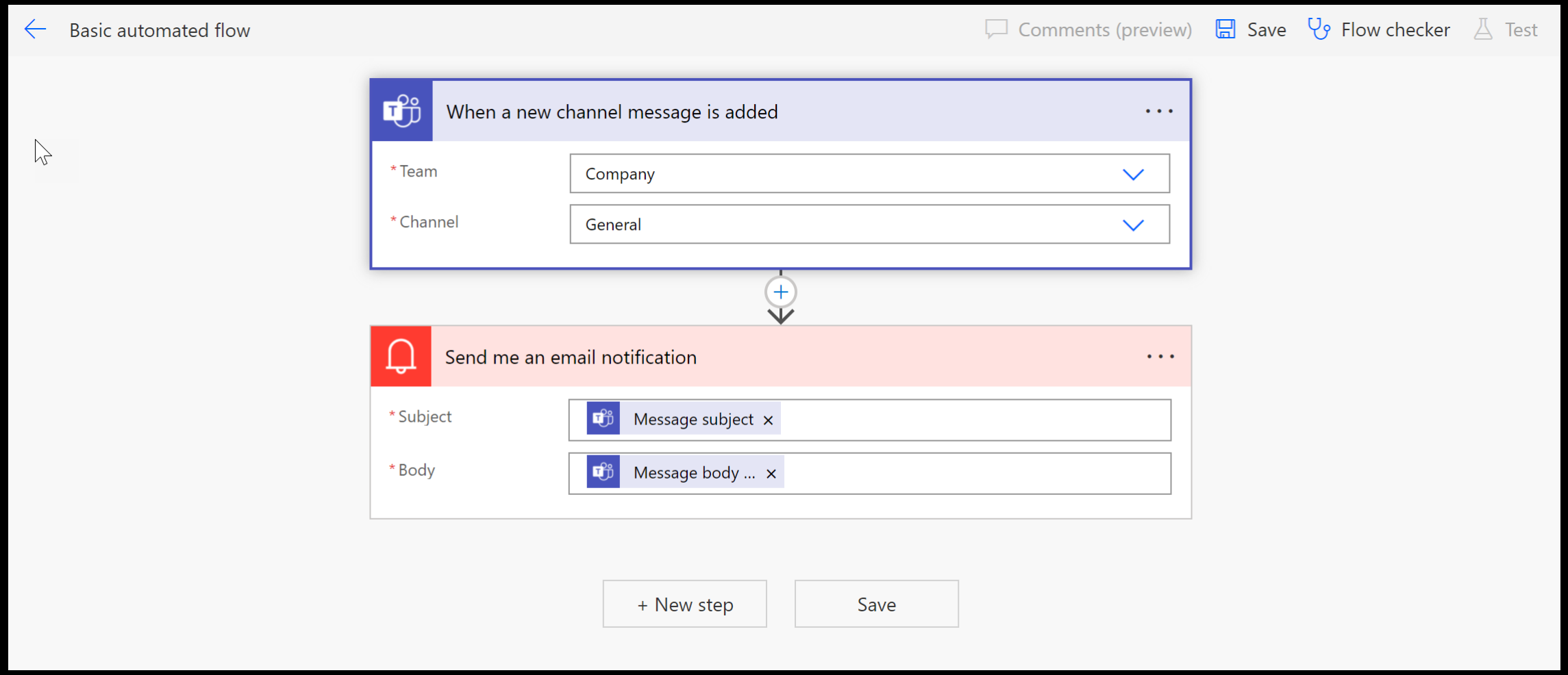
4 types of Power Automates

Cloud Desktop Process Advisor Business Process

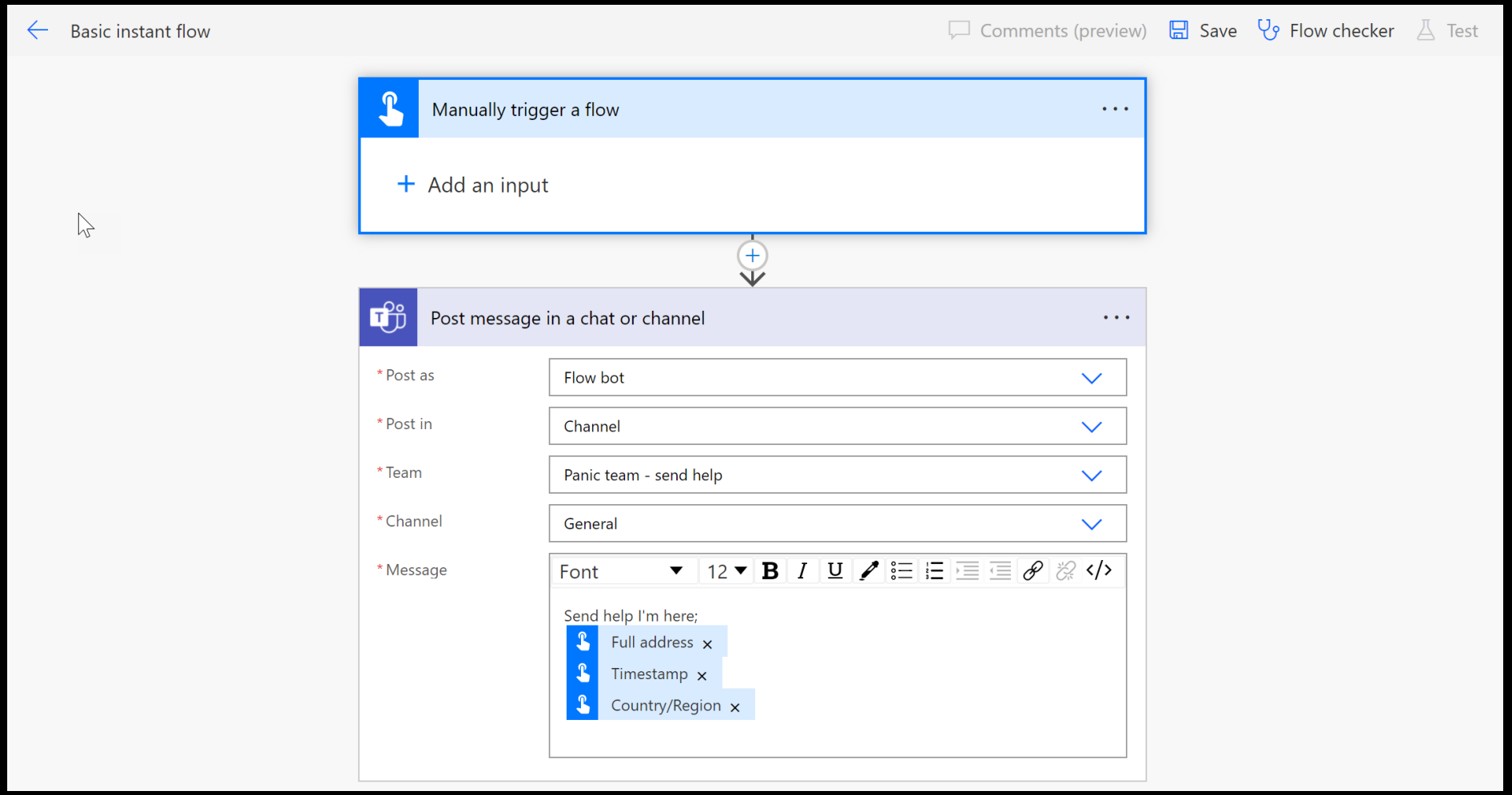
Cloud Flow

- Automated
- Instant
- Scheduled

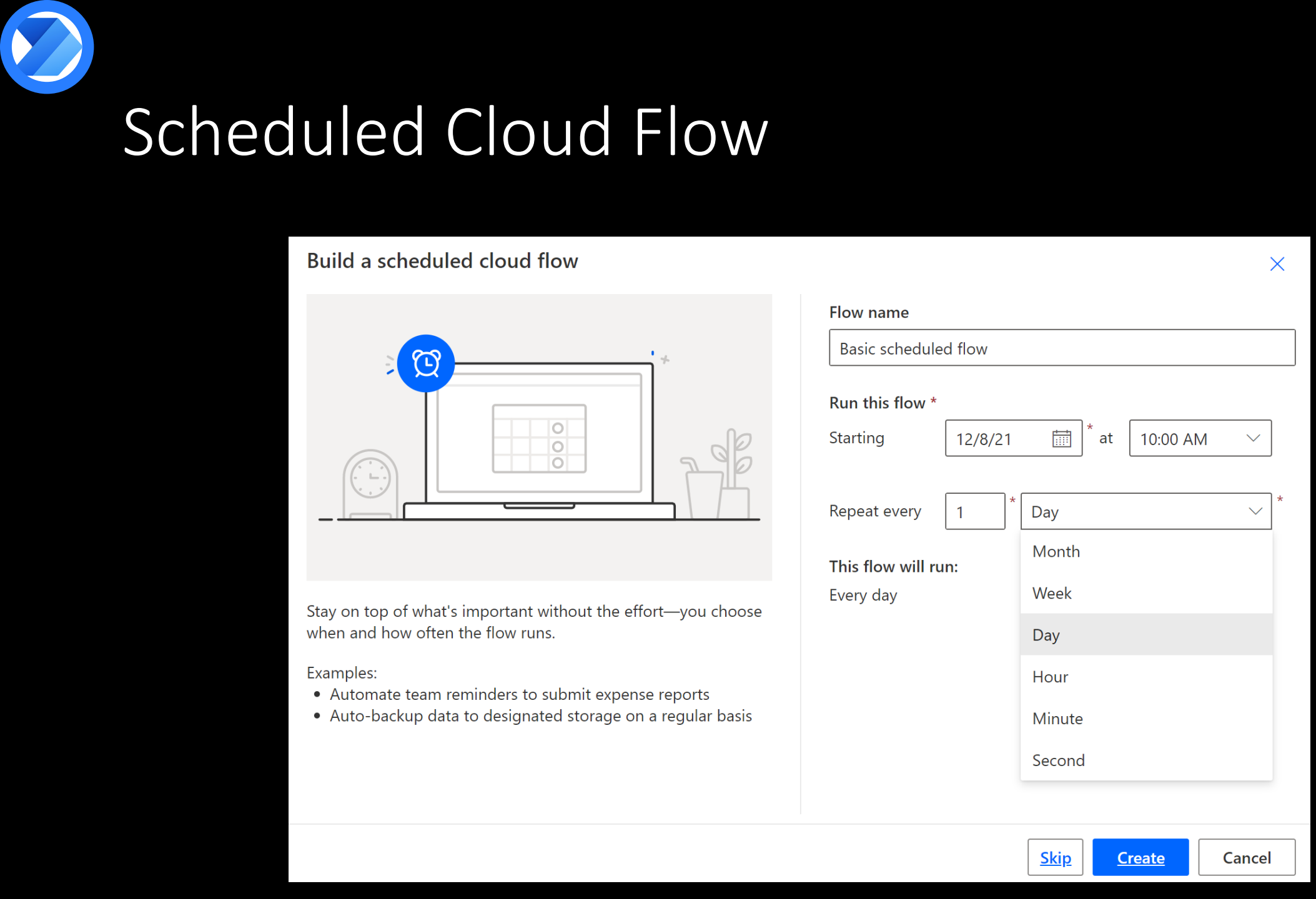
Automated Cloud Flow



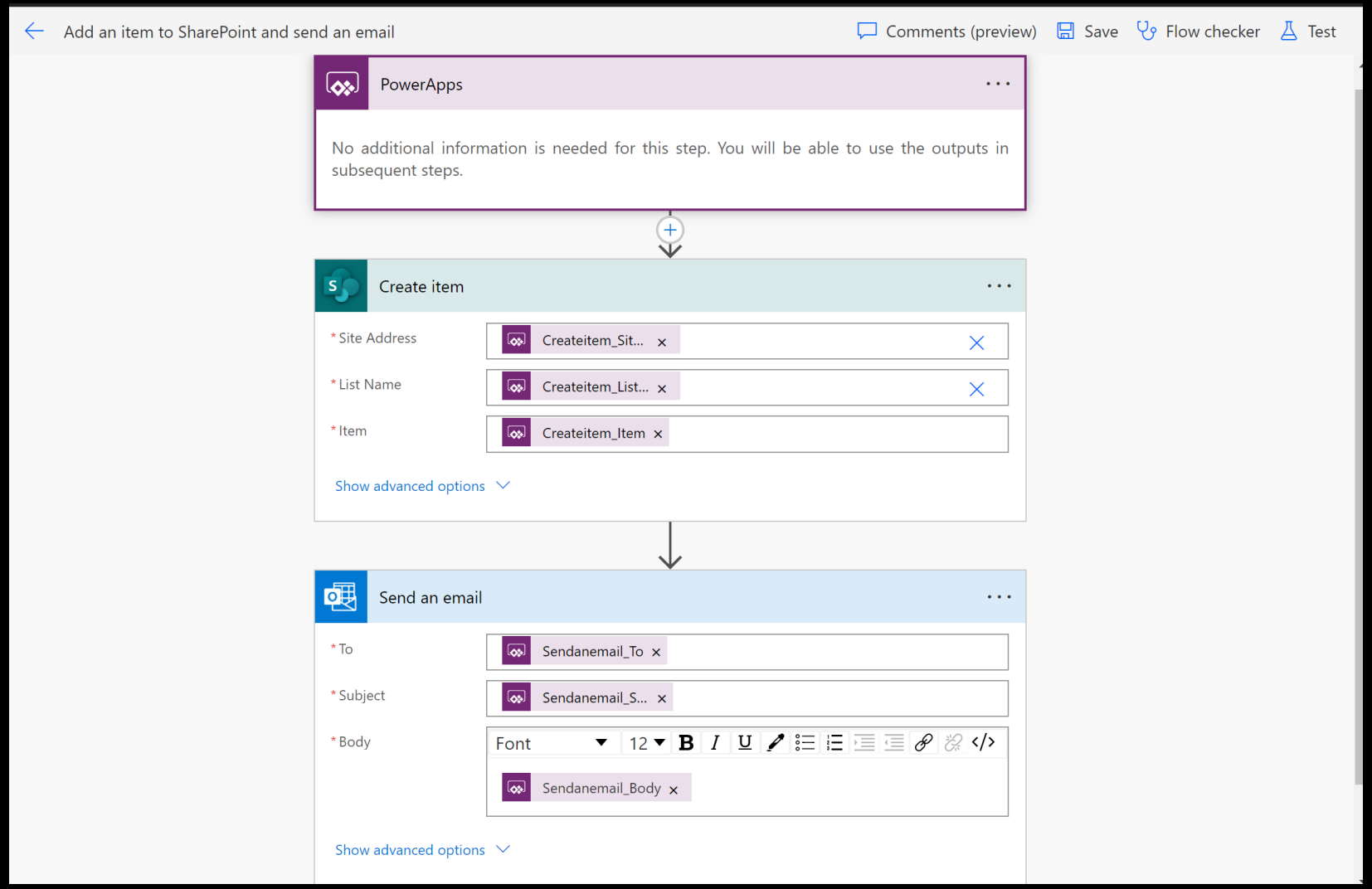
Instant Cloud Flow



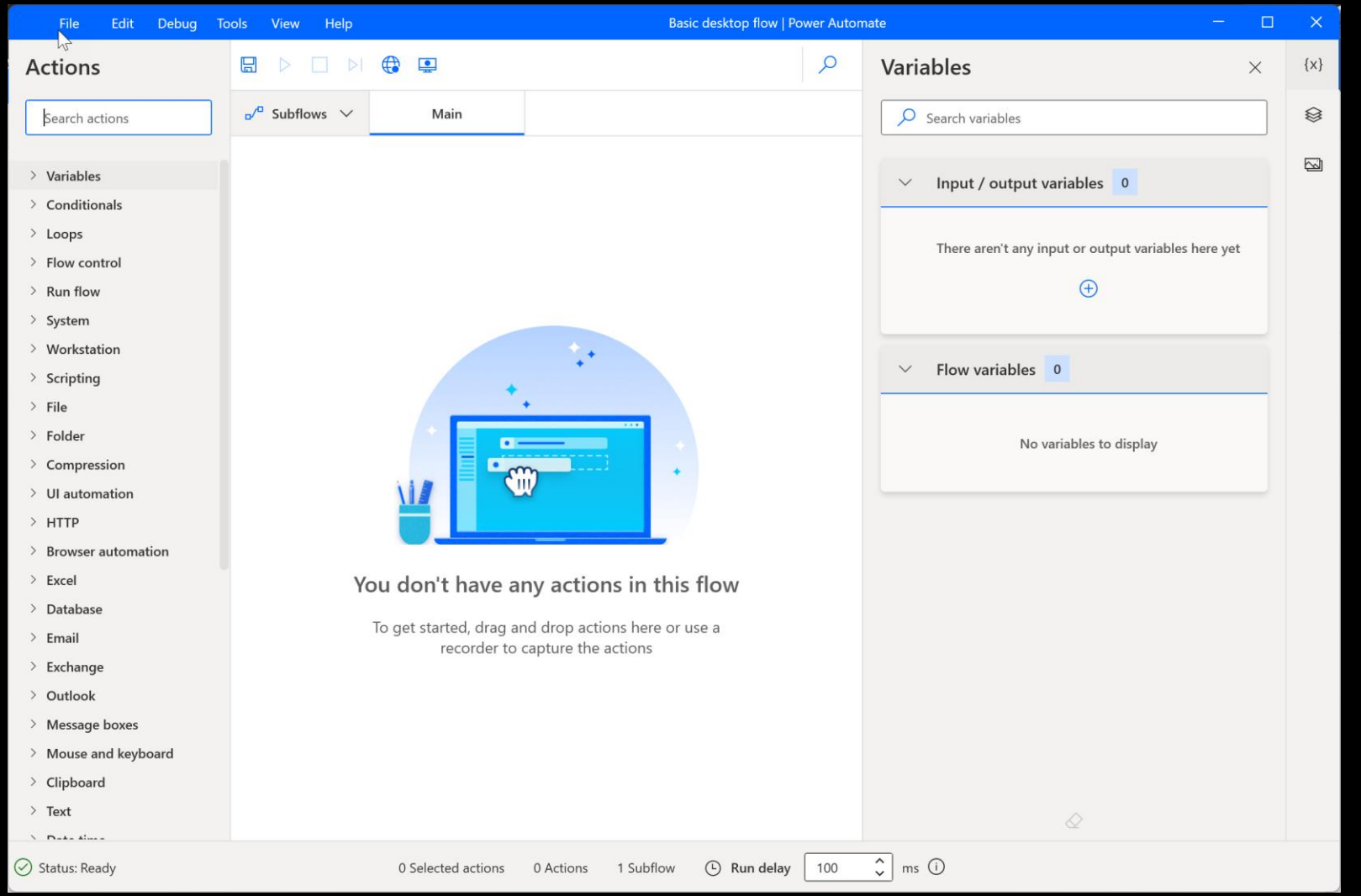
Scheduled Cloud Flow



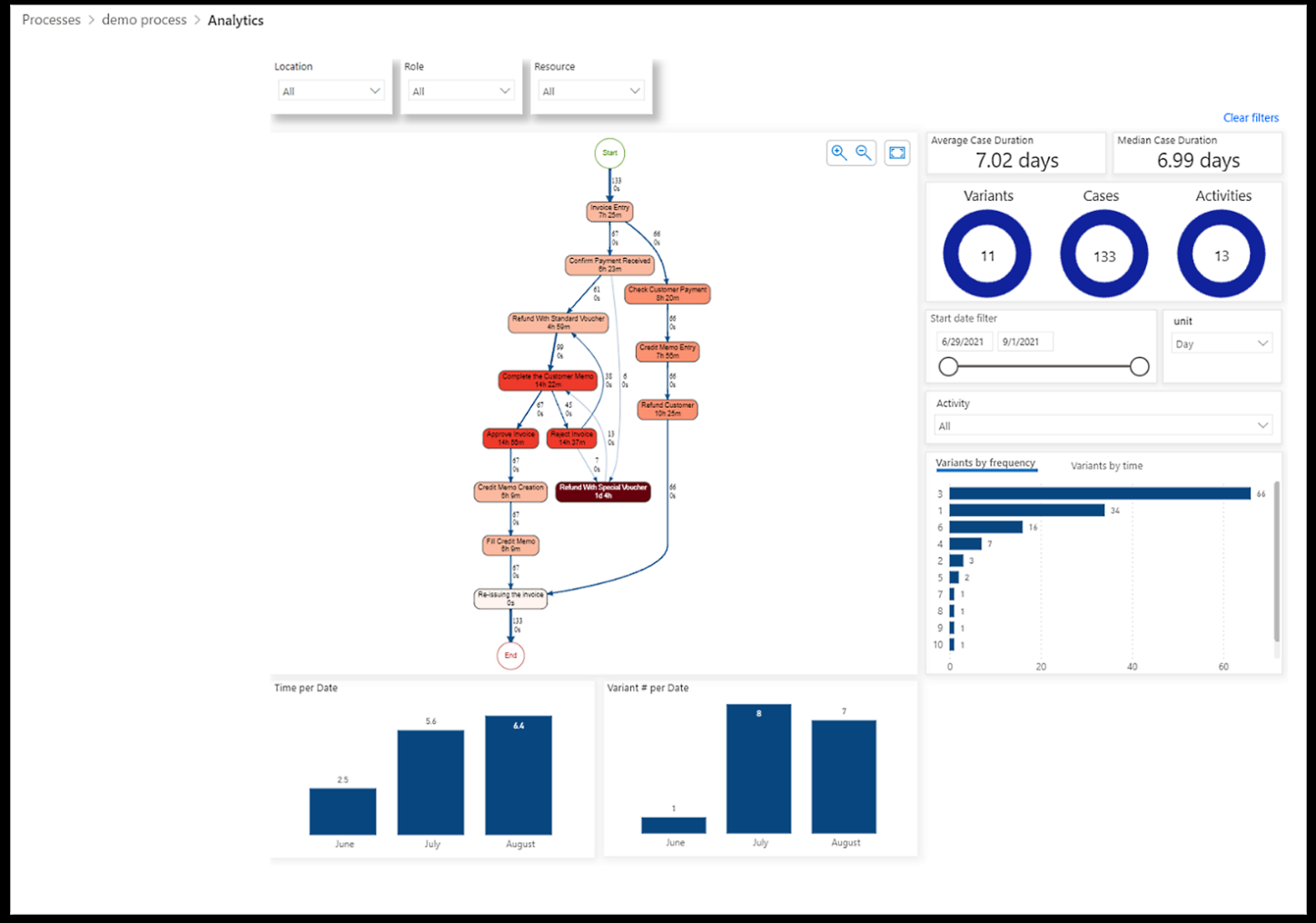
From template



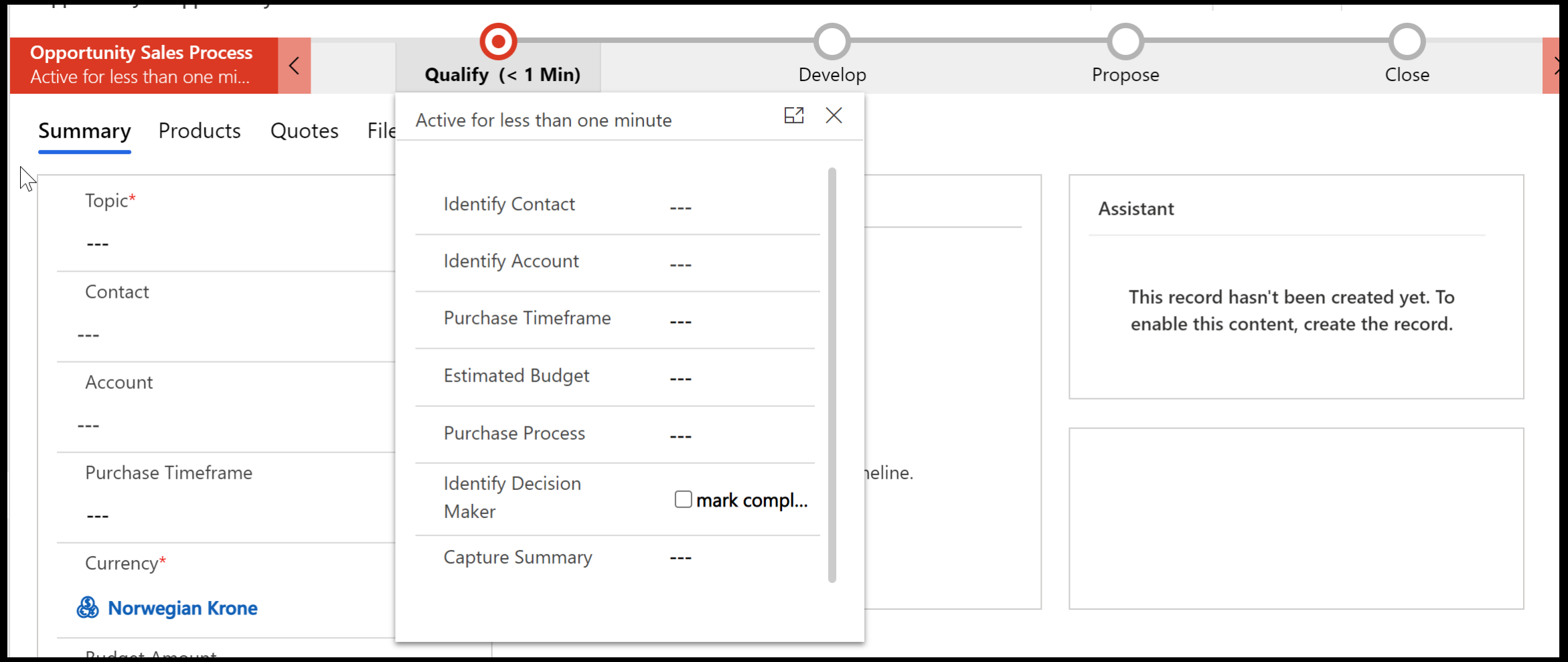
Desktop Flow



Process Advisor



Business Process Flow



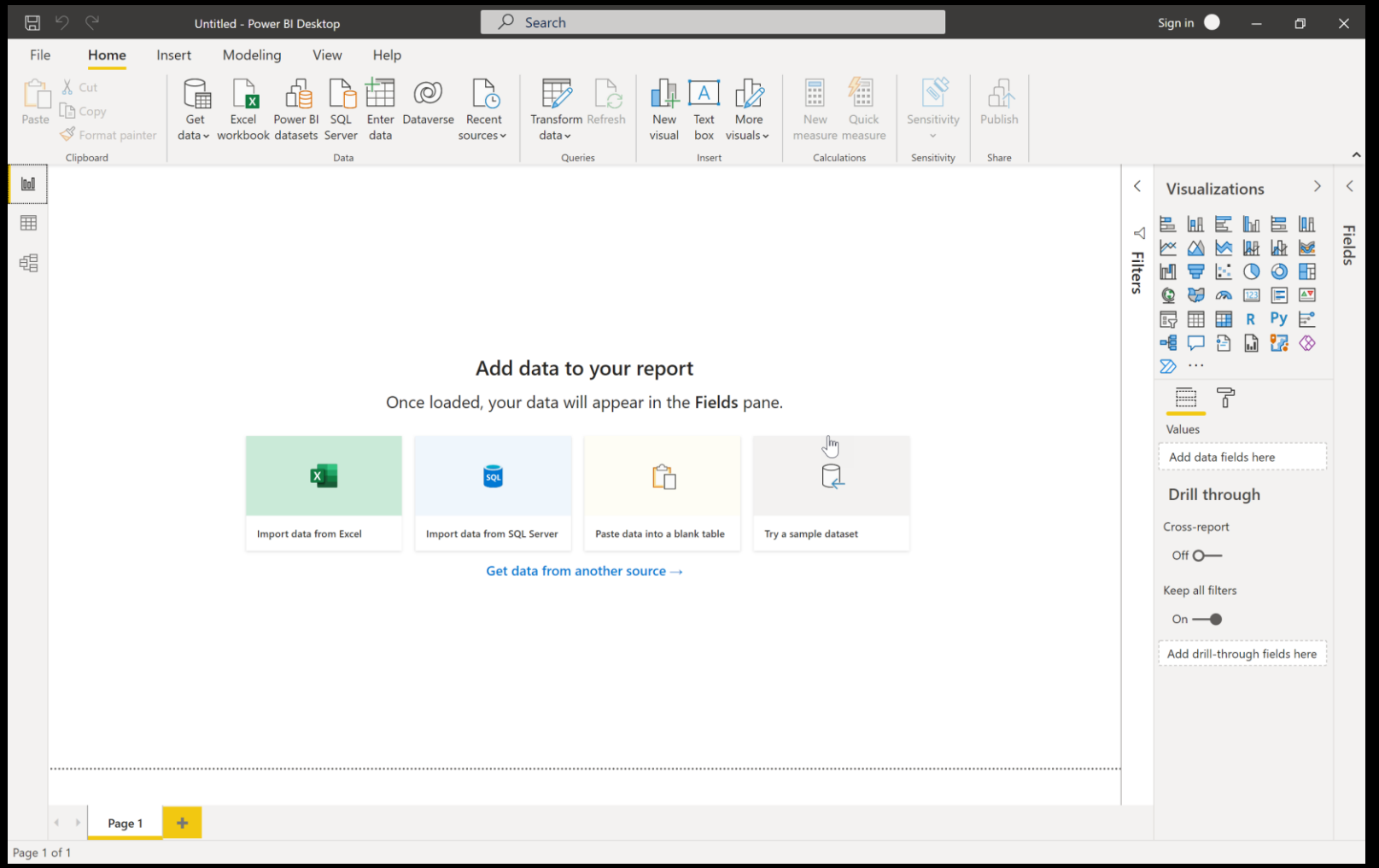
Power BI

Make beautiful reports from all your data sources

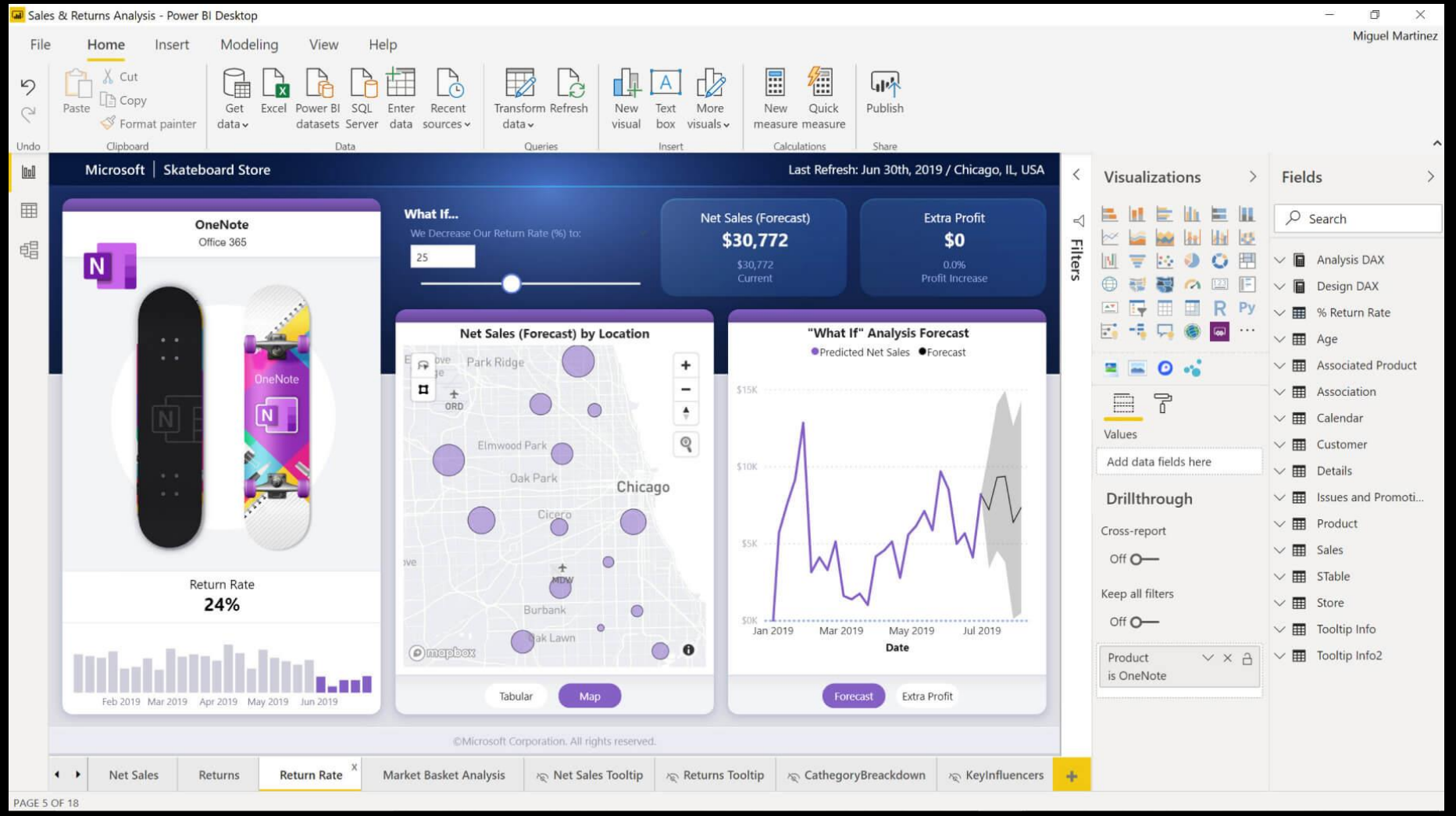
Power BI

Executive_Review_And_Analysis - Power BI Desktop
KPIs
Variance to Budget
Revenue
Visualizations
Fields
Executive_Review_And_Analysis
Actual Revenue
$1.523M
Variance to Budget
$16.7M
Key influencers
Top segments
Archive
Executive Summary

Power BI


Untitled - Power BI Desktop
Search
Sign in
File
Home
Insert
Modeling
View
Help
Paste
Cut
Copy
Format painter
Clipboard
Get data
Excel workbook
Power BI datasets
SQL Server
Enter data
Dataverse
Recent sources
Data
Transform data
Refresh
Queries
New visual
Text box
More visuals
Insert
New measure
Quick measure
Calculations
Sensitivity
Sensitivity
Publish
Share
Add data to your report
Once loaded, your data will appear in the Fields pane.
Import data from Excel
Import data from SQL Server
Paste data into a blank table
Try a sample dataset
Get data from another source →
Filters
Visualizations
Values
Add data fields here
Drill through
Cross-report
Off
Keep all filters
On
Add drill-through fields here
Fields
Page 1
Page 1 of 1

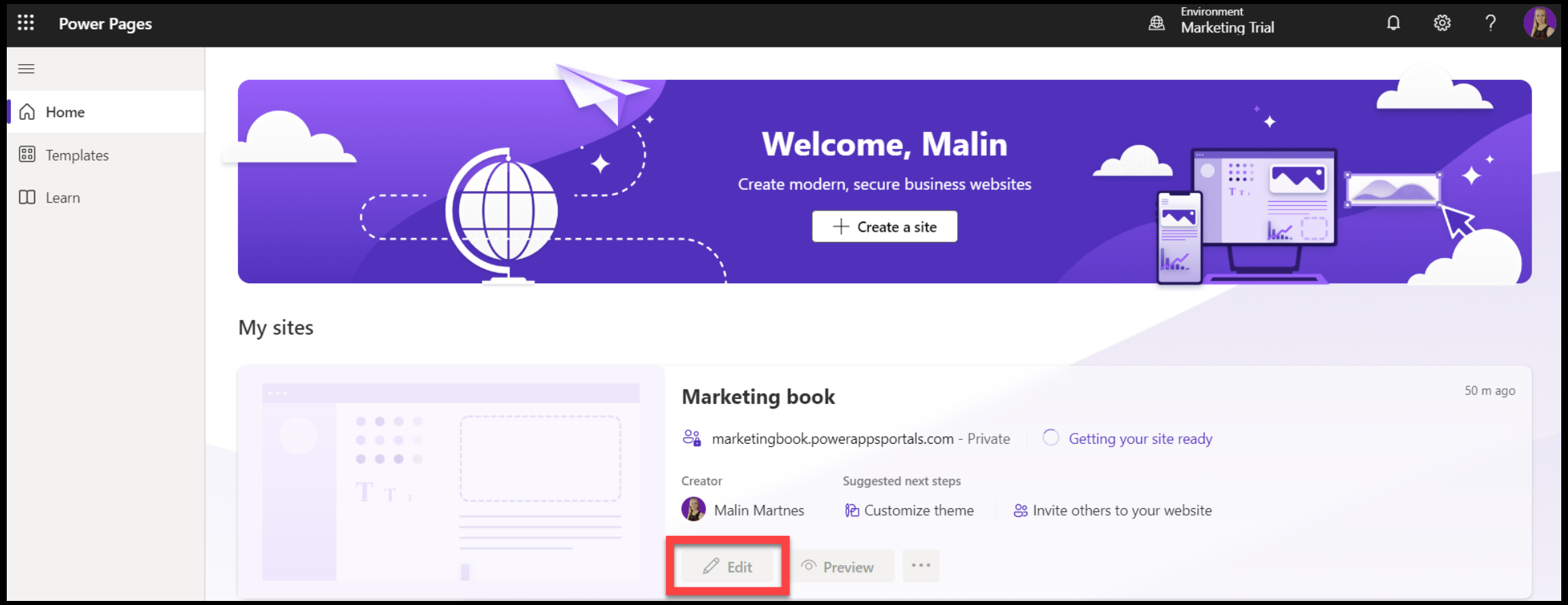
Power BI


Sales & Returns Analysis - Power BI Desktop
Miguel Martinez
File
Home
Insert
Modeling
View
Help
Microsoft | Skateboard Store
Last Refresh: Jun 30th, 2019 / Chicago, IL, USA
OneNote
Office 365
What If...
We Decrease Our Return Rate (%) to:
25
Net Sales (Forecast)
$30,772
$30,772
Current
Extra Profit
$0
0.0%
Profit Increase
Net Sales (Forecast) by Location
Park Ridge
ORD
Elmwood Park
Oak Park
Chicago
Cicero
MDW
Burbank
Oak Lawn
"What If" Analysis Forecast
Predicted Net Sales
Forecast
$15K
$10K
$5K
$0K
Jan 2019
Mar 2019
May 2019
Jul 2019
Date
Return Rate
24%
Feb 2019
Mar 2019
Apr 2019
May 2019
Jun 2019
Tabular
Map
Forecast
Extra Profit
©Microsoft Corporation. All rights reserved.
Visualizations
Fields
Search
Analysis DAX
Design DAX
% Return Rate
Age
Associated Product
Association
Calendar
Customer
Details
Issues and Promoti...
Product
Sales
STable
Store
Tooltip Info
Tooltip Info2
Values
Add data fields here
Drillthrough
Cross-report
Off
Keep all filters
Off
Product
is OneNote
Filters
Net Sales
Returns
Return Rate
Market Basket Analysis
Net Sales Tooltip
Returns Tooltip
CathegoryBreackdown
KeyInfluencers
PAGE 5 OF 18

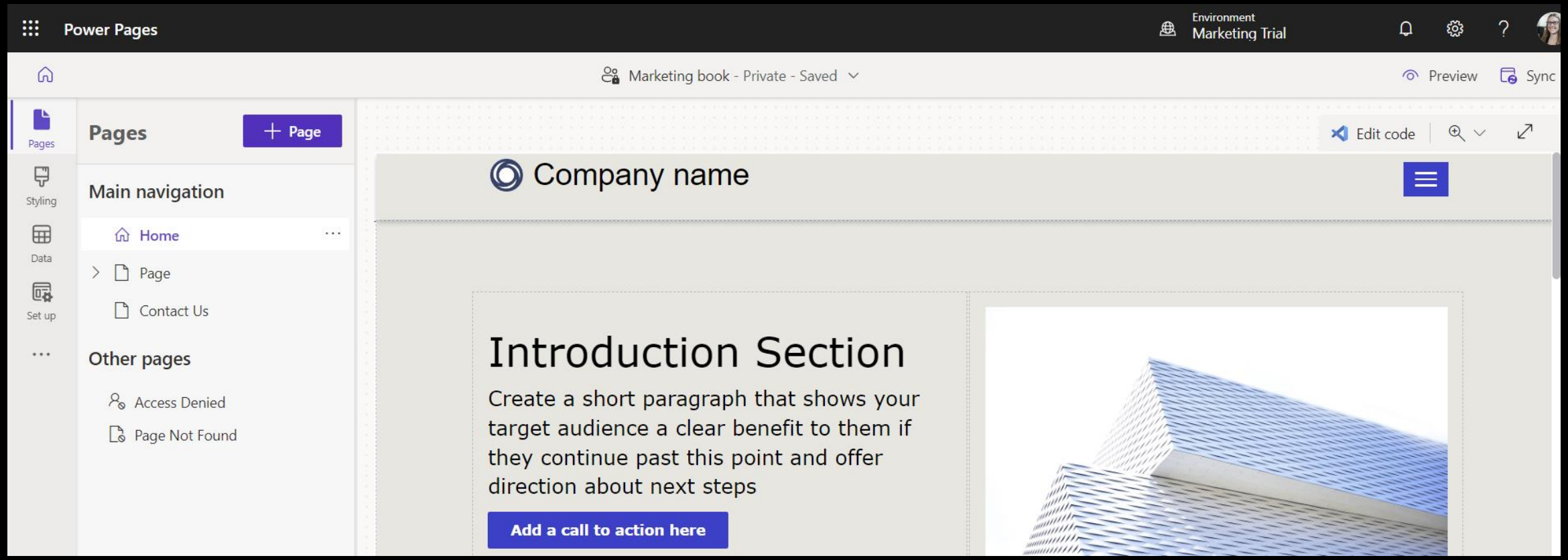
Power Pages

Talk to the world

Power Pages


Power Pages
Environment
Marketing Trial
Home
Templates
Learn
Welcome, Malin
Create modern, secure business websites
Create a site
My sites
Marketing book
50 m ago
marketingbook.powerappsportals.com - Private
Getting your site ready
Creator
Malin Martnes
Suggested next steps
Customize theme
Invite others to your website
Edit
Preview

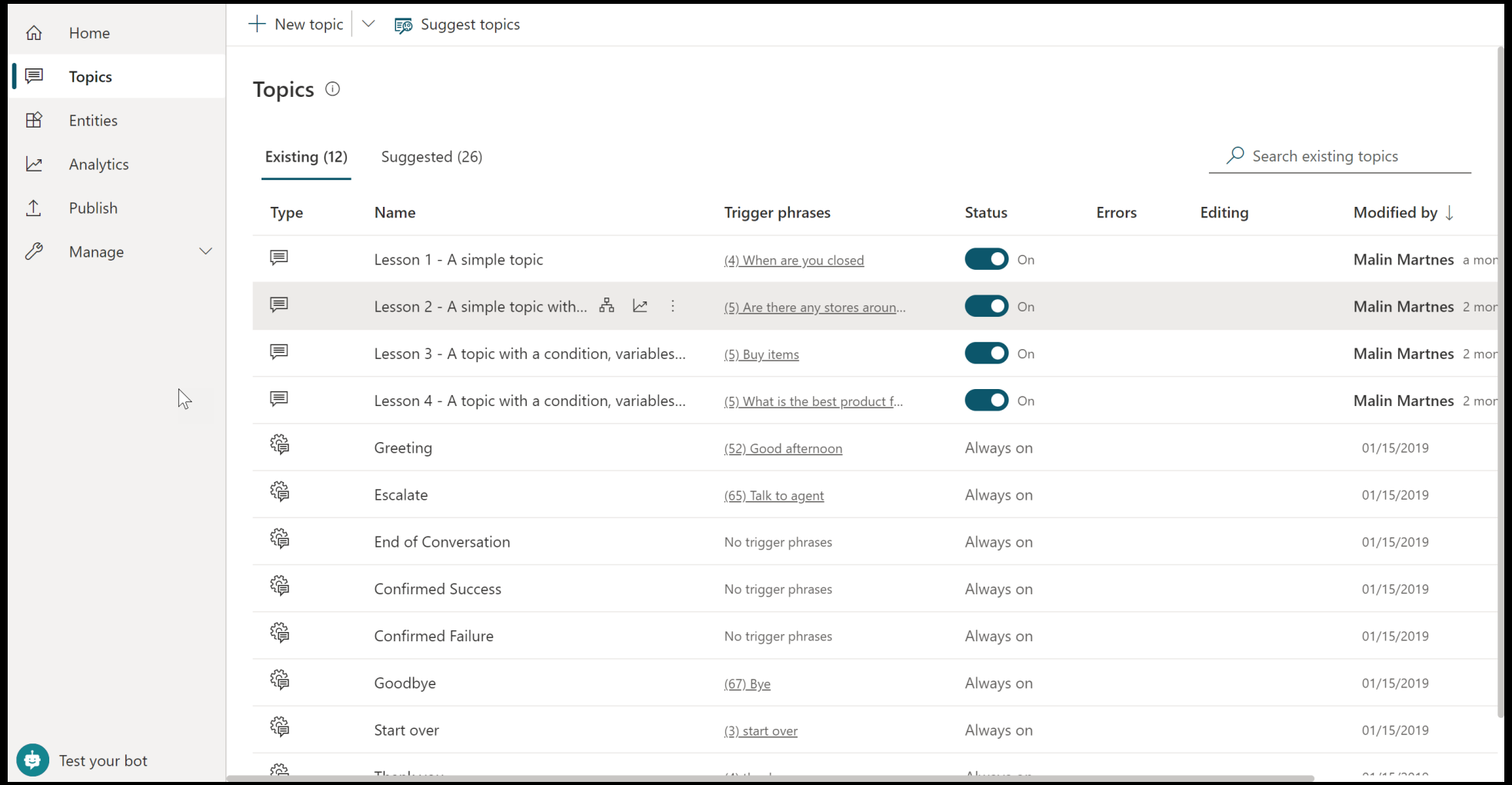
Power Pages


Power Pages
Environment
Marketing Trial
Marketing book - Private - Saved
Preview
Sync
Pages
Styling
Data
Set up
Pages
Page
Main navigation
Home
Page
Contact Us
Other pages
Access Denied
Page Not Found
Edit code
Company name
Introduction Section
Create a short paragraph that shows your target audience a clear benefit to them if they continue past this point and offer direction about next steps
Add a call to action here

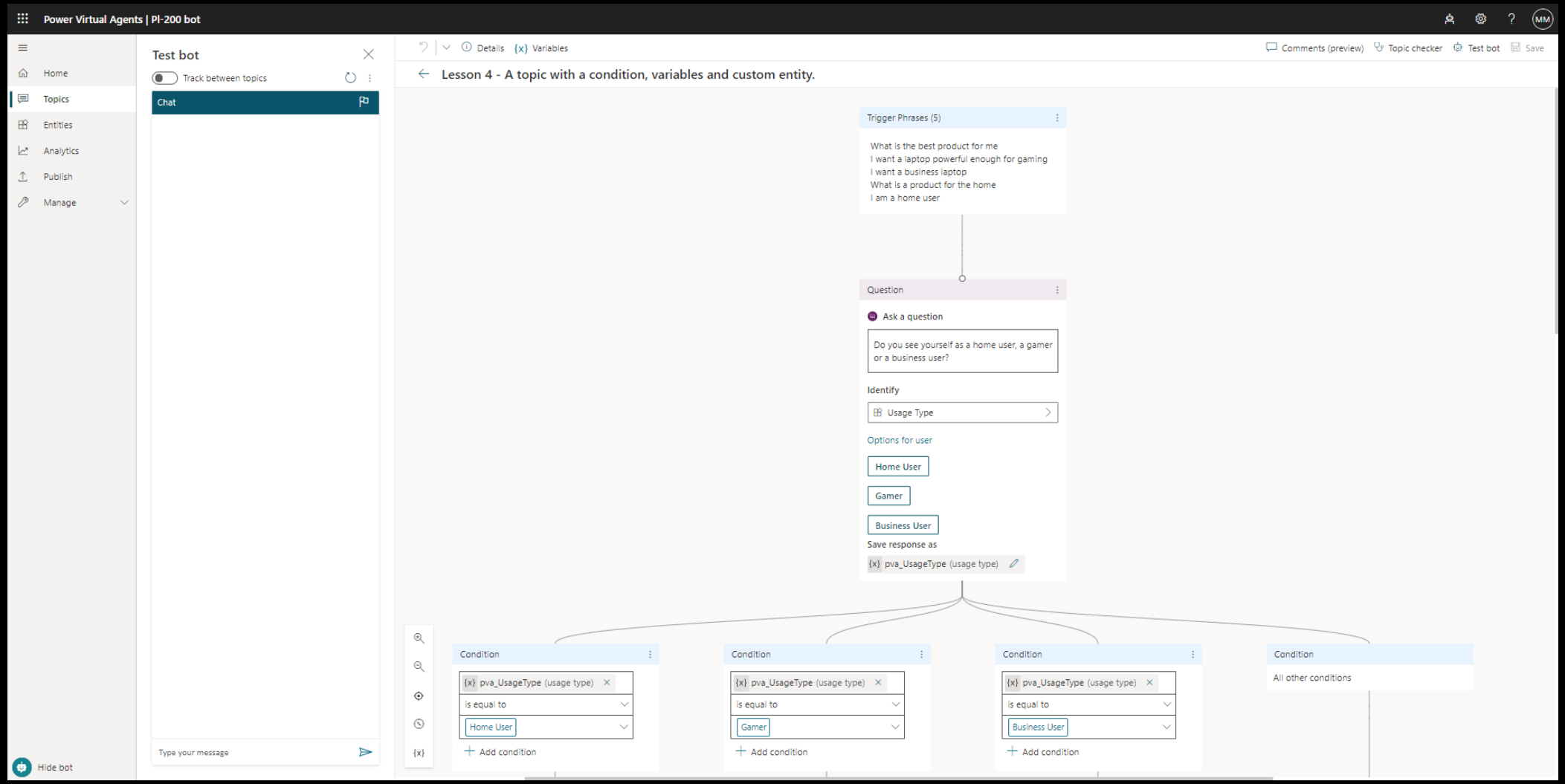
Power Virtual Agent

Anyone can create a bot

Bot topics


Home
Topics
Entities
Analytics
Publish
Manage
Test your bot
New topic
Suggest topics
Topics
Existing (12)
Suggested (26)
Search existing topics
Type
Name
Trigger phrases
Status
Errors
Editing
Modified by
Lesson 1 - A simple topic
(4) When are you closed
On
Malin Martnes a mor
Lesson 2 - A simple topic with...
(5) Are there any stores aroun...
On
Malin Martnes 2 mor
Lesson 3 - A topic with a condition, variables...
(5) Buy items
On
Malin Martnes 2 mor
Lesson 4 - A topic with a condition, variables...
(5) What is the best product f...
On
Malin Martnes 2 mor
Greeting
(52) Good afternoon
Always on
01/15/2019
Escalate
(65) Talk to agent
Always on
01/15/2019
End of Conversation
No trigger phrases
Always on
01/15/2019
Confirmed Success
No trigger phrases
Always on
01/15/2019
Confirmed Failure
No trigger phrases
Always on
01/15/2019
Goodbye
(67) Bye
Always on
01/15/2019
Start over
(3) start over
Always on
01/15/2019

Bot canvas


Power Virtual Agents | PI-200 bot
Test bot
Track between topics
Chat
Type your message
Hide bot
Home
Topics
Entities
Analytics
Publish
Manage
Details
Variables
Comments (preview)
Topic checker
Test bot
Save
Lesson 4 - A topic with a condition, variables and custom entity.
Trigger Phrases (5)
What is the best product for me
I want a laptop powerful enough for gaming
I want a business laptop
What is a product for the home
I am a home user
Question
Ask a question
Do you see yourself as a home user, a gamer or a business user?
Identify
Usage Type
Options for user
Home User
Gamer
Business User
Save response as
pva_UsageType (usage type)
Condition
pva_UsageType (usage type)
is equal to
Home User
Add condition
Condition
pva_UsageType (usage type)
is equal to
Gamer
Add condition
Condition
pva_UsageType (usage type)
is equal to
Business User
Add condition
Condition
All other conditions

Microsoft Power Platform

Power Apps

Power Automate

Power BI

Power Virtual Agents

Power Pages

Data connectors

AI Builder

Dataverse

Power FX

Managed Environments

Skill up!

https://learn.microsoft.com

- Relevant certifications:
  - PL-900: **Microsoft Power Platform Fundamentals**
  - PL-100: Microsoft Power Platform App Maker
  - PL-200: Microsoft Power Platform Functional Consultant
  - PL-400: Microsoft Power Platform Developer
  - PL-600: Microsoft Power Platform Solution Architect

Getting started

https://developer.microsoft.com/en-us/microsoft-365/dev-program

https://tattooedcrmgirl.com/2021/07/08/how-to-create-an-m365-developer-tenant-for-power-platform/

Resources

- https://github.com/MichaelRoth42/SouthcoastSummit21/blob/main/LearningMaterial.md
- https://www.ppweekly.com/
- https://www.virtualeventshub.com/
- https://ukcrm.wordpress.com/2021/05/22/power-platform-starter-days-resources/
- https://powerwiki.net/

- https://www.youtube.com/c/LisaCrosbie/playlists

https://malindonosomartnes.com/

https://www.linkedin.com/in/malinmartnes/

https://twitter.com/MalinMartnes - @MalinMartnes

mm@macotra.no

http://tiny.cc/MalinMVP