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CRM FOR POWER USERS

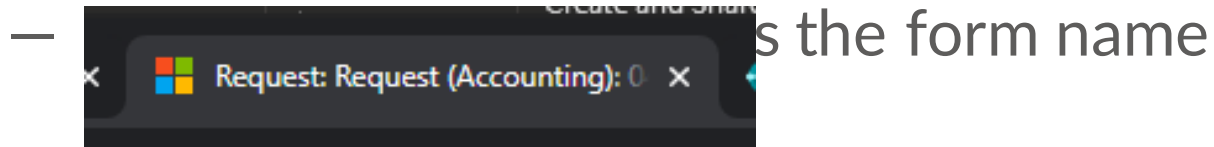
PRESENTED BY
TYLER LONG

OVERVIEW

- Advanced Form Building
- Adding New Columns/Relationships
- Business Rules

ADVANCED FORM BUILDING

- Forms can be accessed in make.powerapps.com
- A quick way to tell what form you are on, looking at your internet browsers tab



- Columns can be created entirely in the form building interface of PowerApps without having to leave

ADVANCED FORM BUILDING – QUICK VIEW

- A Quick View is a “mini” form that can show you related information about a parent record from a child record
 - For example, Request or Gift Information shown on a Payment or Gift Payment or Parent Constituent Information on a Contact
- You create the form as a Quick View in the table entity that the information is coming from

Tables > Constituent > Forms ▾

Name ▾ ↑ ▾

Form type ▾ ▾

Constituent Card - Detailed



Quick View

New Constituent
Constituent

Tax ID	---
Date Exemption Checked	---
Tax Status	---
GOverify Exempt	No
GOverify Exception	---
Institution Type *	---

POWER APPS – CREATING BUSINESS RULES

- Business Rules can be created by clicking on the entity in Power Apps you want to build it for and navigating to Business Rules under the Customizations Section
- Business Rules operate under a series of Conditions and logic paths
 - You set your condition, (if Request Status = Approved) and then you have a True path, and a False Path
 - You get to define what those paths do when the condition evaluates
 - Examples include locking or unlocking fields, setting values, showing or hiding fields, or conditionally making things required
 - You can have up to 9 conditions on a single business rule
- Walkthrough

Q&A/ LIVE WALKTHROUGHS

THANK YOU

Presented By

Tyler Long

Manager of Technical Services



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