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**EMPOWERED**

USER  
CONFERENCE  
2023

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## CRM FOR POWER USERS

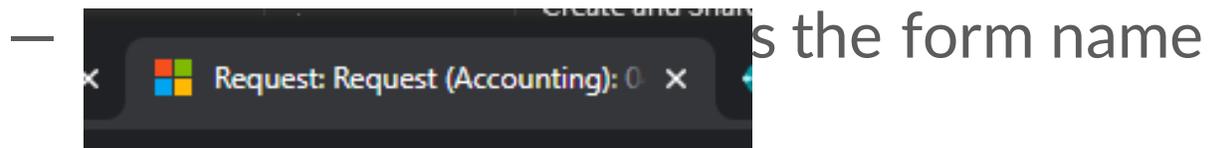
PRESENTED BY  
TYLER LONG

# OVERVIEW

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

# ADVANCED FORM BUILDING

- Forms can be accessed in [make.powerapps.com](https://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	---
🔒 GVerify Exempt	No
🔒 GVerify 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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