

EMPOWERED

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AUTOMATING DATA ENTRY WITH DYNAMICS 365 TOOLS

PRESENTED BY

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STREAMLINING FOUNDATION DATA WITH AUTOMATION

Explore how automation with Business Rules and Formula Fields solves data challenges for Foundation, improving accuracy and saving time.

AUTOMATING FOUNDATION DATA UPDATES WITH BUSINESS RULES

Discover how you can automate data updates for tasks like donation categorization and grant status changes using Business Rules.

COMMON USE CASES

- Showing or hiding fields related to grant reporting based on the grant type.
 - Example: On Requests, Grants require an Applicant, when Scholarships require a Primary Contact
- Populating a field based on data in another field
 - Example: On Gift, populating “Gift Range” based on “Total Gift”

WHAT CAN A BUSINESS RULE DO?

Set Field Value

Auto populate a field based on another field's value.

Set Business Required

Make a field required or optional based on conditions.

Set Visibility

Show or hide fields dynamically.

Lock or Unlock Fields

Prevent users from editing certain fields under specific conditions.

Show Error Message

Display a custom error message when a condition is met.

Set Default Value

Auto assign a default value to a field when a record is created.

Recommendation Action

Provide users with suggestions (with a button to apply the recommendation).

ADD RECOMMENDATION

- Think of it like a **helper** for your data entry forms.
- It applies **IF... THEN...** logic automatically, right on the form.
 - **IF** a certain condition is met...
 - **THEN** do something (like show/hide fields, make fields required, set values, etc.).
- **Why use them?**
 - **Easier for Users:** Only shows relevant fields, reducing clutter.
 - **Better Data:** Helps ensure the right information is captured.
 - **No Code Needed:** You can build powerful logic without writing complex code!

SET RECOMMENDED ACTION

Where to Go:

1. make.powerapps.com -> Your Environment
2. Dataverse -> Tables -> Find your table (e.g., "Requests")
3. Click Business rules tab/section
4. Click + New business rule

SAVE, ACTIVATE, AND TEST!

- **Name:** Give your rule a clear Name at the top
- **Scope:** Choose where it runs. Start with Entity or All Forms.
- **Save:** Click the Save button.
- **Activate:** Click the Activate button (and confirm). It won't work until activated!

UTILIZING FORMULA FIELDS

Learn how Formula
Fields can automatically
calculate values

FORMULA COLUMNS – WHAT YOU CAN DO

- Automatically Calculate Values
- Update in real-time when referenced fields change
- Work with text, number, Boolean, date, and choice fields
- Useful for categorization, conditional flags, and simple math

FOUNDATION FOCUSED EXAMPLES

Field Type	Definition	Formula Example	Real-World Use Case
Text	A text field that displays a string value based on a condition	If(Number Served >80, "A lot", "A little")	Labeling grant applications based on evaluation score
Number	A numeric field that performs arithmetic operations.	Decimal('Requested Amount') * 0.1	Calculating 10% of the requested grant amount as a suggested overhead
Boolean (Yes/No)	A boolean field that evaluates to true or false based on a condition.	Decimal('Requested Amount') > 50000	Flagging high-value grant applications
Date	A date field that calculates a date based on another date.	DateAdd(startdate/enddate, 30, Days)	Calculating a follow-up date 30 days after submission

FOUNDATION FOCUSED EXAMPLES

Field Type	Definition	Formula Example	Real-World Use Case
Currency	A currency field that performs arithmetic operations on monetary values.	<code>If('Grant Recommender Certification', Decimal('Requested Amount') * 0.9)</code>	Applying a discount for Grant Recommender Certified
Duration	A duration field that calculates the difference between two dates.	<code>DateDiff('Begin Date', 'End Date', TimeUnit.Days)</code>	Calculating the duration of a grant project
Custom Label	A custom label field that concatenates multiple text fields.	<code>Concatenate('First Name', " ", 'Last Name')</code>	Displaying full name of applicant
Score/Rating	A score or rating field that calculates an average or other aggregate value.	<code>Round((impactScore + feasibilityScore) / 2, 1)</code>	Averaging evaluation scores for grant scoring
Status Indicator	A status indicator field that displays a status based on a condition.	<code>If('Next Payment Due' > UTCToday(), "Payment Due", "Payments Complete")</code>	Automatically flagging if any payments are due

DEMONSTRATION

Step 1: Open Power Apps

- Go to make.powerapps.com and ensure you are in the correct environment.

Step 2: Go to Request table

- Add a new Column.

Step 3: Fill in the following:

- Display name
- Description
- Data type > Formula
- Input the following formula:
- `Concatenate("Project Duration: ", Text(DateDiff('Begin Date', 'End Date', TimeUnit.Days),"###"), " Days")`

Step 4: Save and publish your changes

FORMULA COLUMNS – KEY LIMITATIONS

- Can only reference fields from the same table.
- Cannot pull data from related or child records.
- Cannot use multi-select fields, images, or files.
- Dates are stored in UTC, formatting can vary by user.

FORMULA COLUMNS – KEY LIMITATIONS

- Date field – User Local based on UTC; must be the same date format types

A screenshot of a form configuration panel for a date field. The panel includes a text input field at the top, followed by several settings:

- Data type ***: A dropdown menu set to "Date and time".
- Format ***: A dropdown menu with three options: "Date and time" (selected), "Date and time", and "Date only".
- Required**: A dropdown menu set to "Optional".
- Searchable**: A checked checkbox.
- Allow form fill assistance (preview)**: A checked checkbox.

A screenshot of a form configuration panel for a time zone adjustment. The panel includes a text input field at the top containing "crct6_". Below it is a dropdown menu for "Time zone adjustment *" with three options: "User local" (selected), "User local", and "Time zone independent".

General

Enable column security ⓘ

Dashboard

Appears i

FORMULA COLUMNS – KEY LIMITATIONS

Feature / Capability	Power Fx Formula Fields	Calculated Fields
Language	Power Fx (Excel-like syntax)	Expression-based (limited UI formula builder)
Custom Logic	More flexible, supports functions, conditionals, etc.	Limited to predefined functions and operators
Cross-Entity References	✗ Not supported	✓ Can reference related entities (1:N, N:1)
Real-Time Calculation	✓ Yes, evaluated on read	✓ Yes, evaluated on read
Stored in Database	✗ No (virtual, computed at runtime)	✗ No (also computed at runtime)
Trigger Workflows/Plugins	✗ No	✗ No
Supported in Views/Forms	✓ Yes	✓ Yes
Function Support	Limited subset of Power Fx	Limited set of functions
User Context / Environment Variables	✗ Not supported	✗ Not supported
Performance	May impact performance with complex logic	Generally optimized for simple calculations
Ease of Use	✓ More intuitive for Power Platform users	⚠ Less intuitive, especially for complex logic
Delegation / Filtering	✗ Not delegable	✓ Better support in queries and filters
Availability	Newer feature, still evolving	Mature, widely used

SESSION RECAP

Formulas, Rules &
Automation

EMPOWERING YOUR CRM: SESSION SUMMARY

- **Demonstrated:** How to build a no-code Dataverse Business Rule to dynamically recommend actions.
- **Built:** A practical example rule triggered by the "Request Type" field value.
- **Discussed:** The significant benefits of CRM automation for Foundation efficiency, data quality, and engagement.
- **Highlighted:** Key limitations and benefits of formula columns for successful automation implementation.

THANK YOU

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Special Guest Stars:

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APPENDIX

- Microsoft Operators and Datatypes – [Link](#)