



Armanino + Microsoft

# Art of the Possible

With Power Platform

# Art of the Possible With Power Platform

- Vision from Microsoft
- “Fireside” Chat with Charles & Chris
- Use case client story
- Power Platform in action

Art of Possible

# Today's Presenters



**Chris Moore**  
Partner, Armanino  
Advisory LLC



**Charles Lamanna**  
Corporate Vice President, Low  
Code Application Platform,  
Microsoft



**Carmel Wynkoop**  
Partner, Armanino  
Advisory LLC



**Murray Fife**  
Dynamics 365 Global Black  
Belt, Microsoft



**Alex Fredrickson**  
Solution Architect, Armanino  
Advisory LLC

## Resources

# Charles Lamanna

Corporate Vice President, Low Code  
Application Platform, Microsoft



Check out Charles' section  
of the webinar here:

[armanino.com/events/art-of-possible-with-power-platform-webinar](https://armanino.com/events/art-of-possible-with-power-platform-webinar)





# Technology Impacting the COVID Response

Carmel Wynkoop

## COVID-19

# Vaccine Registration / Scheduling App

- Public portal to enable people to get into the vaccination pipeline
- Features an integrated map to show vaccination site locations
- Already live in 5 states/cities with additional
- 100 million expected to use the application by the end of the year



### COVID-19 Vaccination Appointment

To schedule an appointment, please fill in the required questionnaire so that we can gather information regarding your readiness for COVID-19 vaccination, and offer guidance and instruction to ensure your safety. You will need to provide the following details:

 <b>Demographic details</b> Such as race, ethnicity, gender, age	 <b>Medical history</b> Current/past ailments and allergy information	 <b>COVID-19 history</b> History of any COVID-19 infections, testing or vaccinations	 <b>Contact information</b> Your contact details
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[Proceed to COVID-19 questionnaire](#)

Please DO NOT register more than once.



## COVID-19

# Vaccine Registration / Scheduling App

1. Select a location
2. Book the appointment
3. Confirm the appointment
4. Reminder email to schedule second dose

Please confirm your booking within : 115 seconds

Date Range	Resource ↑	Start Time	End Time	Duration	
	Trowbridge Dr	1/30/2021 2:00 AM	1/30/2021 2:30 AM	30	<a href="#">Book</a>
	Trowbridge Dr	1/31/2021 1:30 AM	1/31/2021 2:00 AM	30	<a href="#">Book</a>
	Trowbridge Dr	1/31/2021 2:00 AM	1/31/2021 2:30 AM	30	

[Apply](#)

Please confirm your booking within : 48 seconds

## Covid Vaccine - Location Map

Covid-19 vaccinations will be made available in phases to ensure those populations most at risk are prioritized. Based upon your current status, you are currently eligible to schedule your appointment for vaccination. Please select a COVID-19 Vaccine clinic location by clicking on the name from the list below.

Welcome TG TestPortalOneTwoEighteenth

Search for location near el paso, tx within 25 miles [Search](#)

1. **Trowbridge Dr** 4.5 miles  
12345 Trowbridge Dr, El Paso, Texas 79925  
[Get Directions](#)

2. **Trowbridge Dr 2** 4.5 miles  
No available booking slots at this location  
[Get Directions](#)

3. **El Paso Fire Department Training Academy** 5.2 miles  
No available booking slots at this location  
[Get Directions](#)

4. **New El Paso Loc** 5.3 miles  
No available booking slots at this location  
[Get Directions](#)

5. **County Rd** 13.3 miles  
No available booking slots at this location  
[Get Directions](#)

Please review your appointment selection below before submitting.

Name  
TG TestPortalOneTwoEighteenth

DOB  
1/1/1980

Vaccine Location  
Trowbridge Dr

Start Time  
1/31/2021 1:30 AM

End Time  
1/31/2021 2:00 AM

Please enter the code you see below and then click Submit.

HKJZSHP

Generate a new image  
Play the audio code

HKJZSHP Enter the code from the image

[Processing](#)

[Submit](#)



COVID-19

# Vaccine Registration / Scheduling App

- Details sent to the State Immunization Registry / CDC
- City/state has visibility into how many appointments have been booked, how many are available



George Perry Site DOSE 1 ONLY	Get data
1/19/2021	
Selected proposed:	0
Selected committed:	33
Selected checked in:	
Total proposed:	335
Total committed:	728
Total checked in:	

COVID-19

## Vaccine Registration / Scheduling App

- Individual registrants receive confirmation code via email
- QR code scanned at the vaccination site activating the appointment
- Provides the type of vaccine and other CDC information for tracking



### Covid Vaccination

✎ Volunteer: John William Doe

Vaccination Clinic: 123 Main St. ▼

Default Route: Intramuscular ▼

Go to the App >

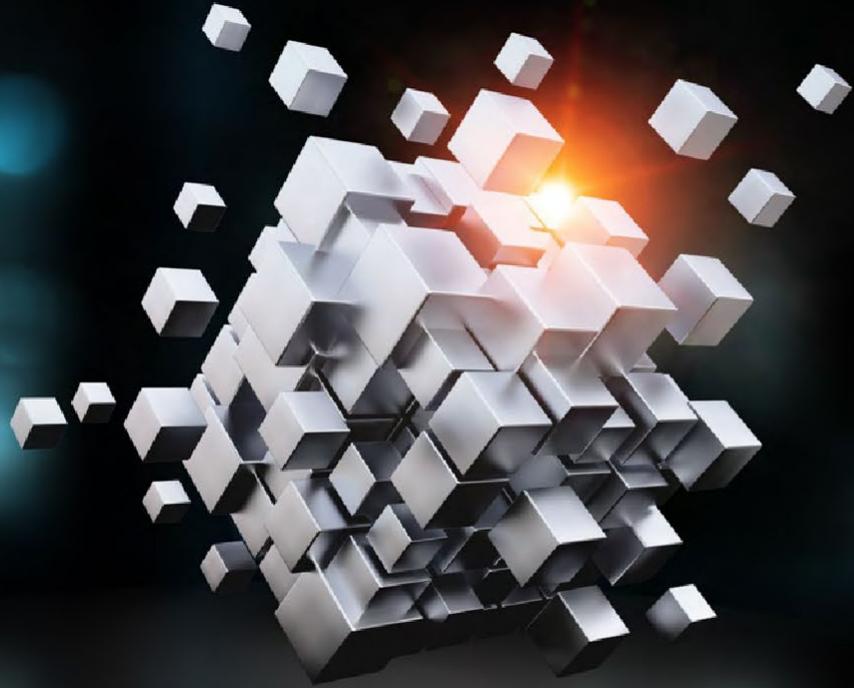
Volunteer: John William Doe

Scan QR From Email

Search By Email

 **TG Test Portal**  
[Taylor.Gordon@armaninollp.com](mailto:Taylor.Gordon@armaninollp.com)

123 Main St.  
1/31/2021 1:30 PM  
V-0000001515



iManage

# iManage

Enables project managers to track accounts, track budget vs. actuals and update forecasts



**Carmel Wynkoop**  
Wednesday, May 5, 2021

Tracking

< MAY 2021 >

Project Name  
**MINNESOTA VALLEY FCU - Install** ▼

**US01-J00100125** In process

MINNESOTA VALLEY FCU  
100 Memorial View Court  
Mankato  
211 - Electronic Security  
PM: Justin Chastanet

**Planning**

**Finance**  
Updated 2 month ago

**Materials**  
Updated 1 year ago

**Assets**

**Scheduling**

**Closeout**

	Actual/Estimate	Adjustment	MFC	CAC
	\$0.00/\$66.10		<input type="checkbox"/>	<input type="checkbox"/>
Electrical/Install	\$1,456.76/\$454.25		<input type="checkbox"/>	<input type="checkbox"/>
Material	\$3,298.00/\$1,784.50		<input type="checkbox"/>	<input type="checkbox"/>
Subcon	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
UseTax	\$0.00/\$146.00		<input type="checkbox"/>	<input type="checkbox"/>
Contingency	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
Design	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
Engineer	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
Freight	\$36.98/\$20.49		<input type="checkbox"/>	<input type="checkbox"/>
MechanicInstall	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
Offsite/TravelTime	\$197.50/\$197.50		<input type="checkbox"/>	<input type="checkbox"/>
OtherDirectCost	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
ProdBuildOut	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
ProgramMgr	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
ProjectMgr	\$0.00/\$316.00		<input type="checkbox"/>	<input type="checkbox"/>
PSG/CustomLabor	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
PTO/Downtime	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>
Specialist-Prog/Test	\$0.00/\$0.00		<input type="checkbox"/>	<input type="checkbox"/>

Estimated Total Cost:	<b>\$2,918.93</b>	Re-Estimated Total Cost:	<b>\$2,918.93</b>
Cost at Completion:	<b>\$2,918.93</b>	Cost Adjustment Variance:	
JTD Actual Cost:	<b>\$4,989.24</b>	Adjusted Gross Margin:	-40.2%
JTD Revenue:	<b>\$0.00</b>	Gross Margin Variance:	0%
Cost % Complete:	<b>100%</b>		
Open commitments:	<b>\$0.00</b>		
Total Monthly Forecast:	<b>\$0.00</b>		

Submit Re-Estimate

**Metrics**

Total Contract Price	<b>\$4,881.00</b>
Gross Margin % / Variance	<b>40.2% / 0%</b>
Over/Under Billing / Ratio	<b>-\$2,113.91 / -2.31</b>
JTD Invoiced / %	<b>\$4,881.00 / 100%</b>

**Invoice History**

Date	Inv#	Amount	Status
10/31/2020		<b>\$2,441</b>	Paid
12/30/2020	IN00001579	<b>\$2,441</b>	Open

**Cost History**

Type	Vendor/Colleague	Amount	Date
Offsite/Trav...	Thomas Brooks	<b>\$198</b>	12/17/2020
Electrical/In...	Thomas Brooks	<b>\$454</b>	12/17/2020
Freight		<b>\$20</b>	10/31/2020
Material		<b>\$32</b>	10/31/2020
Material		<b>\$52</b>	10/31/2020
Material		<b>\$1,170</b>	10/31/2020
Material		<b>\$507</b>	10/31/2020
Material		<b>\$24</b>	10/31/2020
Electrical/In...		<b>\$1,003</b>	07/31/2020
Freight		<b>\$16</b>	07/31/2020
Material		<b>\$507</b>	07/31/2020
Material		<b>\$48</b>	07/31/2020

# iManage

Enables project managers to track accounts, track budget vs. actuals and update forecasts



**Carmel Wynkoop**  
Wednesday, May 5, 2021

Project Name

NCCU 3311 DULUTH ALM - Install
▼

**US01-J00107087** **Finished**

**NORTHERN COMMUNITIES CREDIT UN**  
10657 Sterling Dr.  
Woodbury  
211 - Electronic Security  
PM: Jason Youngblood

**Planning**

**Finance**  
Updated 2 month ago

**Materials**  
Updated 2 month ago

**Assets**

**Scheduling**

**Closeout**

Bill of Materials

Inventory

🗨️
🔄
⚙️

**Bill of Materials**

Ord.	Qty	Device Name / Part #	Vendor	PO Number	Delivery Date	Cost	Ext Cost
✔️	2	14ft Cat5 Patch cable A3L781-14BL	ADI	P000000878	01/04/2021	\$6.71	\$13.42
✔️	1	16-ZN WIRELESS RECEIV EN4216MR INOV	ADI	P000000878	01/04/2021	\$210.99	\$210.99
✔️	10	2-BTTN PENDANT X-MTT EN1235D INOV	ADI	P000000878	01/04/2021	\$59.99	\$599.90
○	25	Cable - CL2P - 4C 22 WI-622204R-WH/RD LAPP			01/04/2021	\$0.10	\$2.50
✔️	1	Dual Tamper Switch ICP-EZTS BOSC	Anixter Inc.	P000000879	01/04/2021	\$4.65	\$4.65

Estimated Material Cost:

Planned Material Cost: **\$5,378.69**

Publish

**Purchase Orders**

PO Number	Vendor	Create Date	Status	Order Qty	Received Qty	Total Cost	Confirmed
P000000878	ADI	01/06/2021	Received	14	13	\$1,419.30	✔️
P000000879	Anixter Inc.	01/06/2021	Open order	2	0	\$54.65	✔️
P000000880	Integrated Control Technology	01/06/2021	Open order	117	1	\$3,877.50	✔️
P000000881	Viking Electric Supply, Inc.	01/06/2021	Open order	4	0	\$139.20	✔️

**Purchase Order Details**

PO Number	Status	Item ID	Cost	Order Qty	Received Qty	Create Date	Delivery Date
P000000878	Received		\$6.71	2	2	01/06/2021	01/06/2021
P000000878	Open order	B11 BSCH	\$0.00	0	0	01/06/2021	01/06/2021
P000000878	Received	EN1235D INOV	\$59.99	10	10	01/06/2021	01/06/2021
P000000878	Received	EN4216MR INOV	\$210.99	1	1	01/06/2021	01/06/2021

The background features a dark blue field with a faint world map. On the left, a large grey gear is partially obscured by a cluster of glowing cyan squares. The top and bottom edges of the blue field are decorated with glowing blue circuit-like lines and nodes.

# Power Platform in Action

Murray Fife

# Increase productivity and provide exceptional service



**Organizations reported a reduction of 70% in call, chat and/or email inquiries after implementing virtual agents**

Chatbots excel at repetitive tasks, freeing up time for higher value work. They can answer routine inquiries and act on behalf of the customer, enhancing productivity by managing routine issues.



**Two thirds of customers prefer to solve issues on their own through self service**

AI driven virtual agents provide rich, personalized self service. They enhance satisfaction while empowering leadership with the tools they need to consistently deliver exceptional service internally and externally.

1. [Gartner](#)  
2. 2018 Global State of Customer Service, Microsoft

# Empower your people

Give business users and subject matter experts the tools to easily create powerful bots using a guided, no code graphical interface. No need for developers or data scientists. AI is now democratized.



## Faster, better bot building

Make building and updating a bot faster and easier. No need for IT or dev teams to maintain the bot lifecycle.



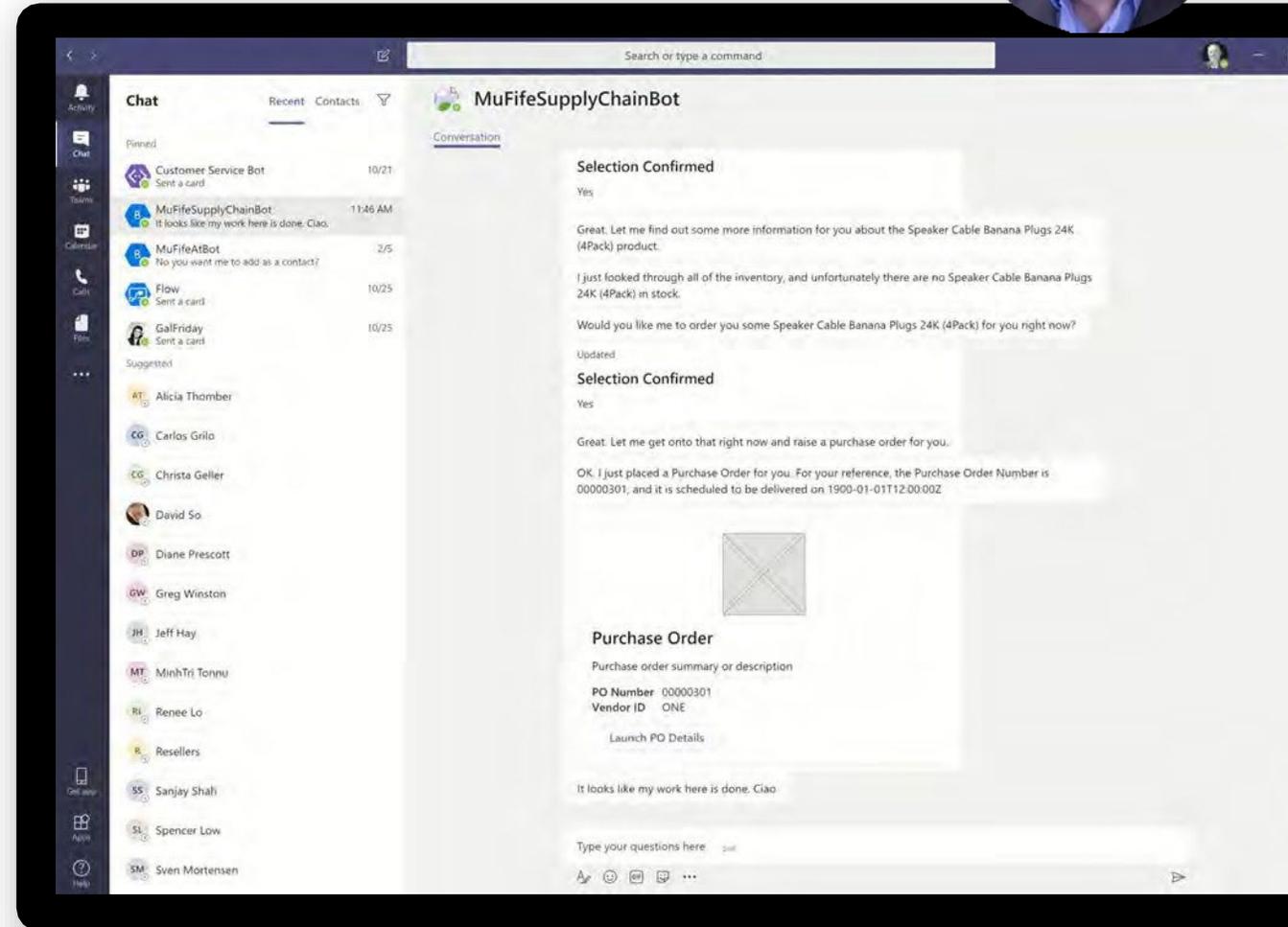
## Continuous growth and improvement

Powerful metrics and insights help tell you what topics to build next.

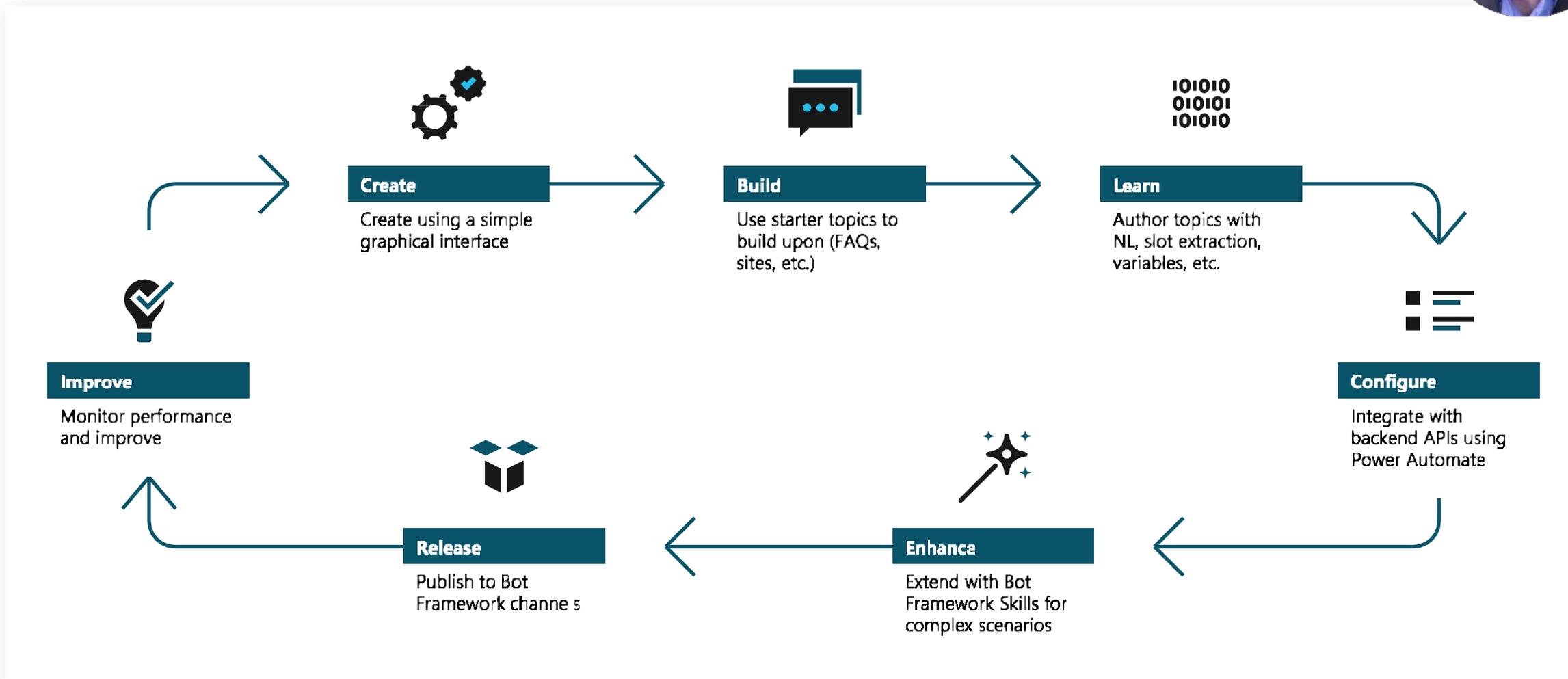


## No need to train custom models

Semantic embedding eliminates the need for data scientists or complex model tuning.



# The lifecycle of a Power Virtual Agents bot



# Easily build impactful bots



Learn from your bot's chats — then use what you learn to build even more impactful conversations.

## Simple, graphical bot creation

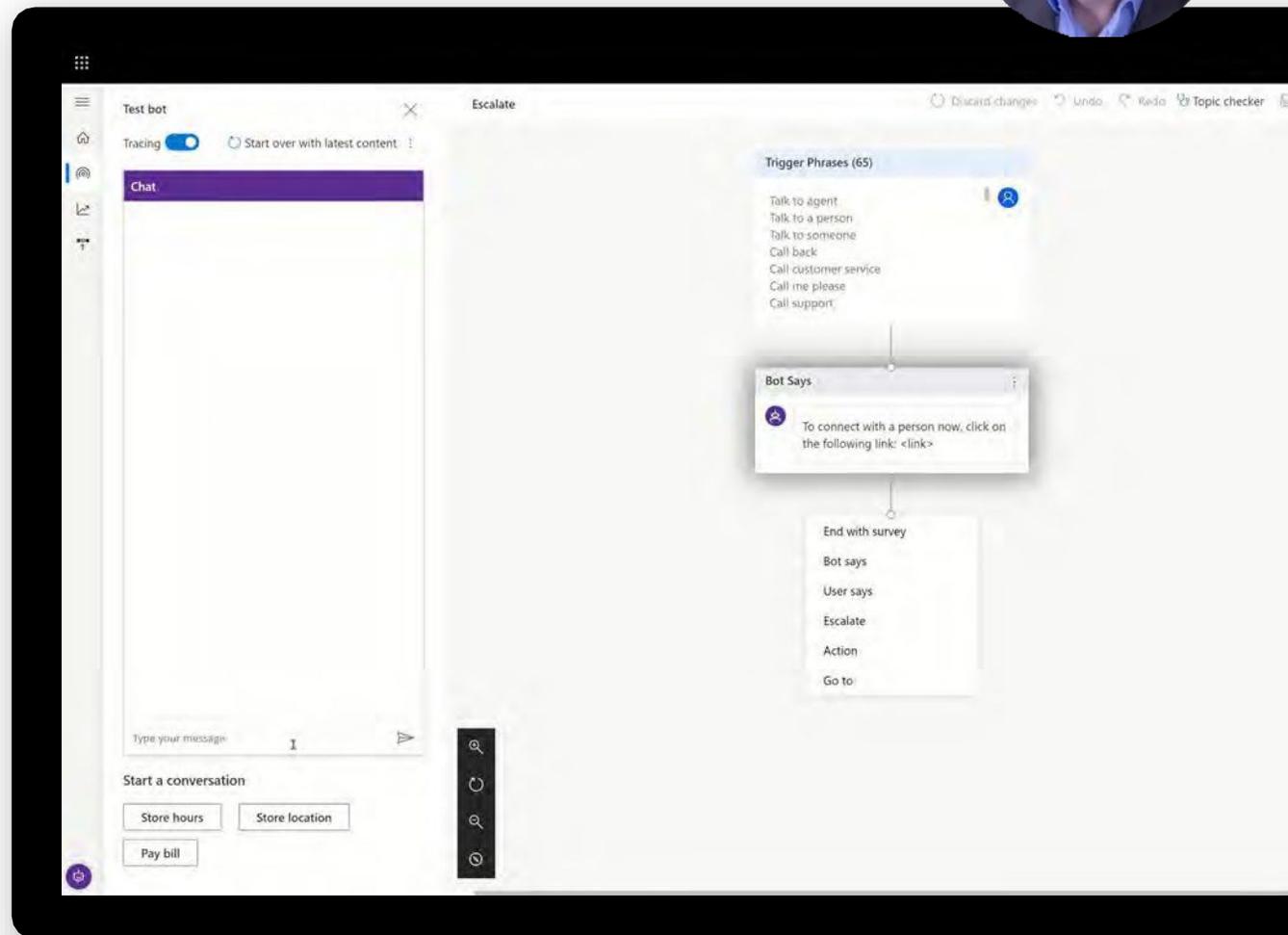
Easily test and maintain bots through a simple, intuitive graphical interface.

## Extract info from user responses

Recognize, extract, and act on dozens of common entities in a user's responses (currencies, ages, dates, times). Create your own custom entities, like model numbers.

## Remember user responses

Store user information for later use in variables and apply them to branch out or create complex conversations.





# Power Platform in Action

Alex Fredrickson



# D365 Automated Document Processing

- Consolidates the hundreds of documents from various sources received by organizations each day
- Reduces time-consuming, and error-prone manual processes
- Accelerates Order Entry Process
- Reduces friction/sticking points in organizational business processes

**Invoice Processing Automation**

**Invoices**

Review and amend the processed invoices you received from your providers.

Invoices List Provider Refresh

Invoice n°	Received on	Amount	Provider	Status	Due date
1929837344	12/16/2020	7,950.00	InvoiceProcessing	Processed	3/31/2021
OFF-152332	12/16/2020	3,000.00	Alex_Invoice	Processed	1/10/2021

**Review invoices**

Click on an a processed invoice to review and amend the fields.

---

**Invoice - N°OFF-152332**

Status: Processed Delete invoice

**Fields selection**

Invoice Number	Bill To Name	Invoice Date
OFF-152332	Contoso Manufacturing	12/11/2020
Total Amount	Due Date	
3,000.00	1/10/2021	

**Sales Order**

**Comments**

Back **Validate** Next invoice

**Contoso Manufacturing**  
123 Main Street  
San Jose, CA 95128  
USA

**Invoice**

Number: OFF-152332  
Invoice Date: 12/11/2020  
Page: 1 of 1  
Sales order: 10000000000000000000  
Your reference: 10000000000000000000  
Our reference: 10000000000000000000  
Payment reference: 10000000000000000000

Item number	Description	Quantity	Unit	Unit price	Discount amount	Discount
1001	Processor	1.00	ea	3,000.00	0	0.00

This text is from the Sales Order Invoice form notes

Sales amount	Total	Total	Net amount	Sales tax	Grand total
3,000.00	3,000.00	3,000.00	3,000.00	0.00	3,000.00

Due date: 1/10/2021



# D365 Receiving with Photos

- Provides real-time visibility into inventory
- Simplifies the inventory receipt process into a single end-user experience
- Accelerates the process of moving inventory from receiving to put-away, quality, or other destinations

**Receiving**  
Welcome Octavio Laos

**PO receipt (item)**

**PO receipt (Category)**

**RMA Receipt**

Powered by Acmanino

Find Purchase Order  4/21/2021

Purchase order number 000002

Line nr	Item nr	Qty	Unit	Delivery date
1	M0005	2480	ea	8/20/2016

Select for update

Purchase order number 000002

Line nr	Item nr	Qty	Unit	Delivery date
2	M0005	12	ea	11/20/2016

Select for update

Purchase order number 000002

Line nr	Item nr	Qty	Unit	Delivery date
3	M0006	1480	ea	8/20/2016

Select for update

Purchase order number 000003

Line nr	Item nr	Qty	Unit	Delivery date
1	P0002	800	ea	11/30/2016

Select for update

Purchase order number 000002

**Update**

Packing Slip Number

Purchase order number 000002

Line nr	Item nr	Qty	Unit	Delivery date
1	M0005	2480	ea	8/20/2016

Receipt quantity:

Batch:  +

Serial:  +

Purchase order number 000002

Line nr	Item nr	Qty	Unit	Delivery date
2	M0005	12	ea	11/20/2016

Receipt quantity:

Batch:  +

**Cancel** **Receive**

# Thank you for joining!

- Connect with us:  
[experts@armanino.com](mailto:experts@armanino.com)
- Visit us:  
[armaninollp.com/software/microsoft-power-platform](http://armaninollp.com/software/microsoft-power-platform)



# Armanino Operates in an Alternative Practice Structure:

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