'How to integrate existing processes into your Microsoft 365 Environment using Power Apps or Dynamics'

By Noema Beardsworth

Many organisations are currently modernising their systems, and many are choosing solutions based on Dynamics 365 and Power Apps. These systems are especially powerful due to their customisability, and so it's important to make use of this. In this article we'll talk you through a real example of the integration of a process that was previously managed with spreadsheets, into becoming fully integrated into the housing management system, with **no code-writing necessary**!

The business case for this is simple:

- it saves staff time
- makes sure everyone is following **the same process**, and;
- keeps data safe and accessible for analysis.

So on to our example - let's talk about repairs. Imagine you have a housing management system that manages repairs works orders but doesn't have a process or space for recording resident feedback.
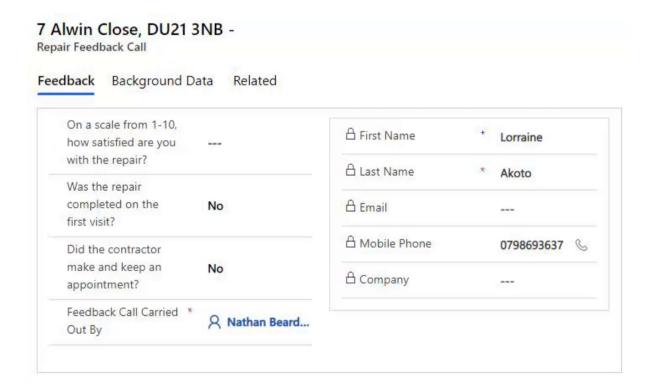
"How satisfied were you with the repair that was carried out on a scale from 1-10?"

For example, at the end of every month staff go through completed repairs, phoning the residents to ask such questions. Integrating this process specifically would save staff time in several ways:

- It would reduce the risk of data being lost, breached, or duplicated.
- It would make the feedback results data more visible and **easily integrated with other data** for better analysis.
- Finally, it would make the process more visible, and open the door to future changes and automation.

How It's Done

To achieve this, we just need to do a bit of background data setup and make a new form in the system that staff can access to record feedback. The form would be accessible via a link from any given repair page, and you'd make it so that the resident's **contact details showed automatically** on the right of the form. This way, operatives don't have to switch between pages and systems for their information.

Further Automation

You could then use Microsoft's Power Automate to generate a request to the repairs team automatically when a repair is completed, asking the team to call the resident for feedback. Dynamics would even support you if you wanted to use a texting service to **contact residents automatically** to ask them the feedback questions. You could configure such a system to automatically record this data in Dynamics using the existing data structure we created above.

The system is made for quickly adding in new processes and changing existing ones, which enables innovation. Changes can be user-led, **empowering your customer-facing staff** to improve their ways of working.

Is it right for you?

Dynamics has a huge range of benefits, largely from customisability but also because of how easy it is to access all your data and integrate with other systems. Its interface is intuitive and modern, and adapts well to different screen sizes. **3C** can help you to understand your needs and to implement technologies such as this one.

Look out for 3C's next blog on MS Viva coming soon!