K2's The ABCs Of Automation With Microsoft's Power Platform

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Major Topics

- Overview of the Power Platform and its components
- Review examples of business processes that may benefit the most from using automation
- Discussion and demonstration of its low-code/no-code app development environment

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Learning Objectives

- Identify the major steps in automating business processes
- Identify two rudimentary process automation applications in Microsoft 365 and explain how the use cases for these applications differ from those for Power Platform
- List the applications which make up the Power Platform
- From a list, identify significant differences in expected use cases and user bases for Microsoft Forms in Microsoft 365 and Microsoft Power Automate/Power Apps in the Power Platform
- Identify the Power Platform components used to solve common problems when creating process automation solutions

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Description

Automation and standardization are two of the many keys to productivity, but most people who are not programmers are unsure where to start. Microsoft's Power Platform is a comprehensive business application platform for creating automated workflows, integrations, and data-driven near real time reports. Components include Power BI (Business Intelligence), Power Apps (multi-form internal apps), Power Automate (data integration and creation of simplified business logic), Power Pages (data driven extranets), and Power Virtual Agents (Ai-driven chatbots). Attend this session to learn about this platform and how everyone can use its low-code, no-code environment to solve process challenges.

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AUTOMATING BUSINESS PROCESSES

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Automating Business Processes

- Also known as “Digital Transformation”
- With the advent of low code/no code applications, can be done in businesses of all sizes, often with limited IT assistance
- Successful efforts usually require a combination of:
  - Document management
  - Workflow management
  - Change management
- Often tackled as part of a document management initiative, initial efforts frequently fail miserably, and people often give up

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Automation Efforts

Some of the challenges of automating business processes include:

- Employee and customer resistance to change
- Integration with existing/legacy systems (RPA may be a workaround)
- Cost and commitment after setbacks
- Complexity of efforts and availability of IT support
- Data security and privacy

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Key Steps – Process Automation

1. Process identification and documentation
2. Technology selection
3. Enterprise architecture planning
4. Implementation strategy –change management, user training
5. Monitoring and optimization

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Process Identification And Documentation

- What are your business processes?
- How many business processes does your organization have?
- List and define (very high level) the process
  - Name of process
  - Goals and rough description
  - Incumbent system(s) used
  - Inputs, outputs, transformations required
  - How labor intensive/expensive is the process?
  - What works about the current process?
  - What needs improvement?
  - How are others in our industry addressing this challenge?
- Select a few simple processes first for some quick wins and learning

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Technology Selection

- Goal: Make the most of existing tech stack, with an eye toward digital transformation
- Identify
  - Needs vs. wants
  - What integrations and processes are mission critical/mandatory vs. optional
  - How often do the applications need to be interfaced to meet your business needs
  - What are the biggest challenges to be addressed/automated and how will you manage the transition
  - Regulatory compliance requirements and challenges
  - Backup procedures for business continuity in a platform failure (e.g. hotels)

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Enterprise Architecture Planning

Platforms and tools for automation:

- Office 365/Zoho/Google can handle simple lists, forms, tasks internally
- Project management may require MS 365 Planner, Trello, Asana, Monday.com or other platforms
- No-code forms/survey tools in office suites (MS 365, Zoho Forms, Google) or more sophisticated tools if required (SurveyMonkey, Zoho Forms, MS Power Apps, etc.)
- Workflow platforms are now integrated with cloud ERP solutions
  - Businesses of any size may use MS Power Platform, Zapier, or Zoho One
  - Mid-sized businesses may use Acumatica, EXACT, NetSuite, or others
  - Enterprises will use Oracle Cloud ERP, Workday, SAP S/4HANA
  - Small businesses may use Airtable, Smartsheet, or IFTTT (watch out for privacy)
  - CPA Firms may use Digilence Experience Cloud or Once Accounting

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Enterprise Architecture Planning

Platforms and tools (continued):

- Workflow platforms include MS Power Platform, Zoho One, Salesforce, and many others – including industry-specific solutions
- Integration platform as a Service (iPaaS) tools use event triggers, buttons, or timed actions to create “digital plumbing” which automates data transfer from earlier steps into later ones
  - Candidates include Zoho Flow, Zapier, Power Automate, Boomi, Jitterbit, Appian, and many others

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Enterprise Architecture Planning

Platforms and tools (continued):

- Robotic Process Automation (RPA) tools can fill in where the tools in your app stack are not supported by your workflow platform
  - Think of RPA as macros (bots either auto-recorded or coded by IT pros)
  - Setup and licensing can require a significant investment of technical talent, time, and money
  - The macros used are finicky, and changes of UI, screen resolution, or even fonts can cause stable bots to fail
- Pick solutions and approaches which you expect to be around and be supported for 10 years or more

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Implementation Strategy

- Pilot project/phased approach versus all at once cutover
  - Most will choose a phased approach, but some processes will require an “all at once” implementation
  - Poor implementations and weak communication will cause turnover and make implementations much harder
- Change management
  - Training and documentation of the process
  - Working and communicating with people whose jobs will be affected
  - Gathering and responding to bug reports, feedback, and complaints

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Monitoring And Optimization

- Once a process is automated on a platform and has created log files, Process Mining solutions can analyze activity and help you figure out what needs improvement
  - Analysis of team performance and step response times
  - Visual mapping of exception frequency and how resolved
- Business analytics tools like Microsoft Power BI, Zoho Analytics, or Tableau can also report in real time or near real time on activity, identify roadblocks, and help develop new performance measures and KPIs

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INTRODUCTION TO THE POWER PLATFORM

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Microsoft’s Power Platform

Power BI

Power Automate

Power Apps

Power Pages

Power Virtual Agents

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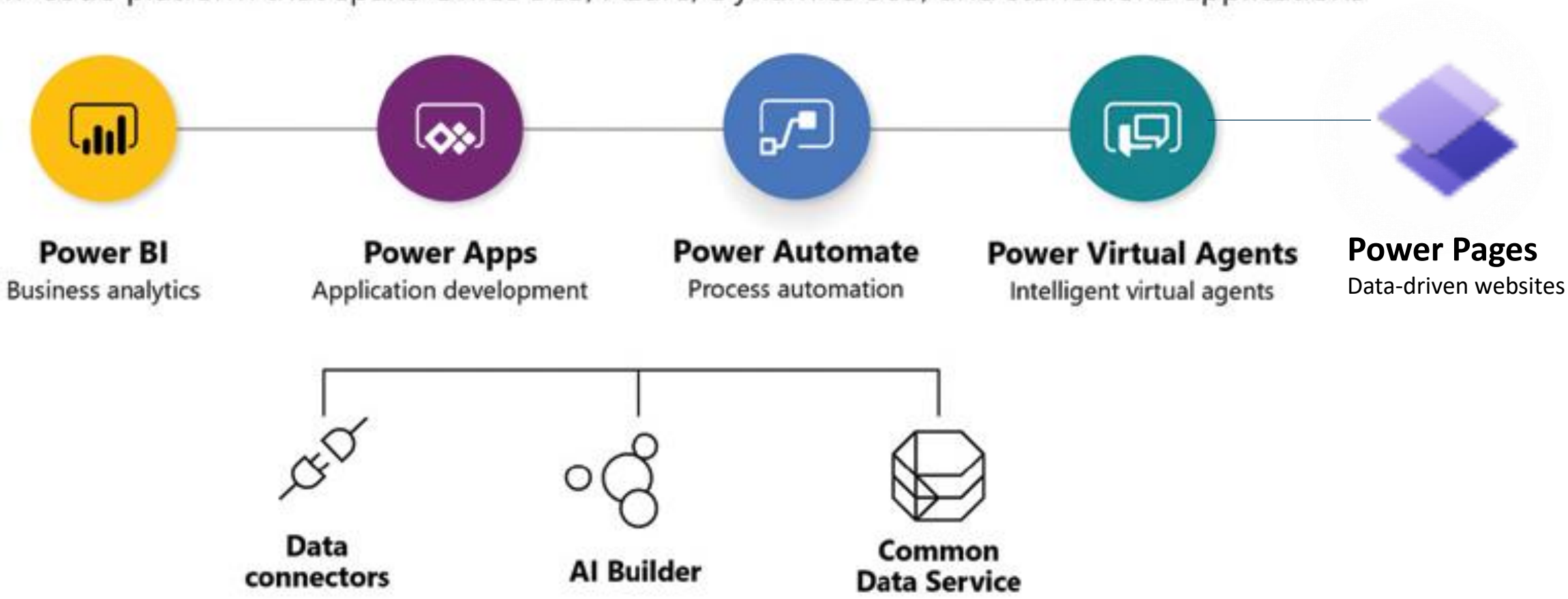
Microsoft’s Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



Source: Microsoft

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The Power Platform

- This is a “low-code/no-code” toolset designed to help business users solve many of their own problems
- Power Platform is also pro-code friendly, so developers can also make the most of it without having to use the simplified low-code/no code tools
- The interfaces in the Power Platform work across all the apps – so if there’s a connector to a solution for Power BI, the same interface/connector should also work with the other Power Platform tools

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Power Automate

- Tool for creating event-triggered dataflows between hundreds of applications
- Formerly known as Microsoft Flow
- Business logic/rules can be added to a data flow/workflow using a low-code/no-code approach
- Has an integrated robotic process automation (RPA) tool called Power Automate Desktop which uses an action recorder/replay engine similar to Excel/Word/Office macros, but RPA can be run across most any application (or to transfer data between most applications) in Windows

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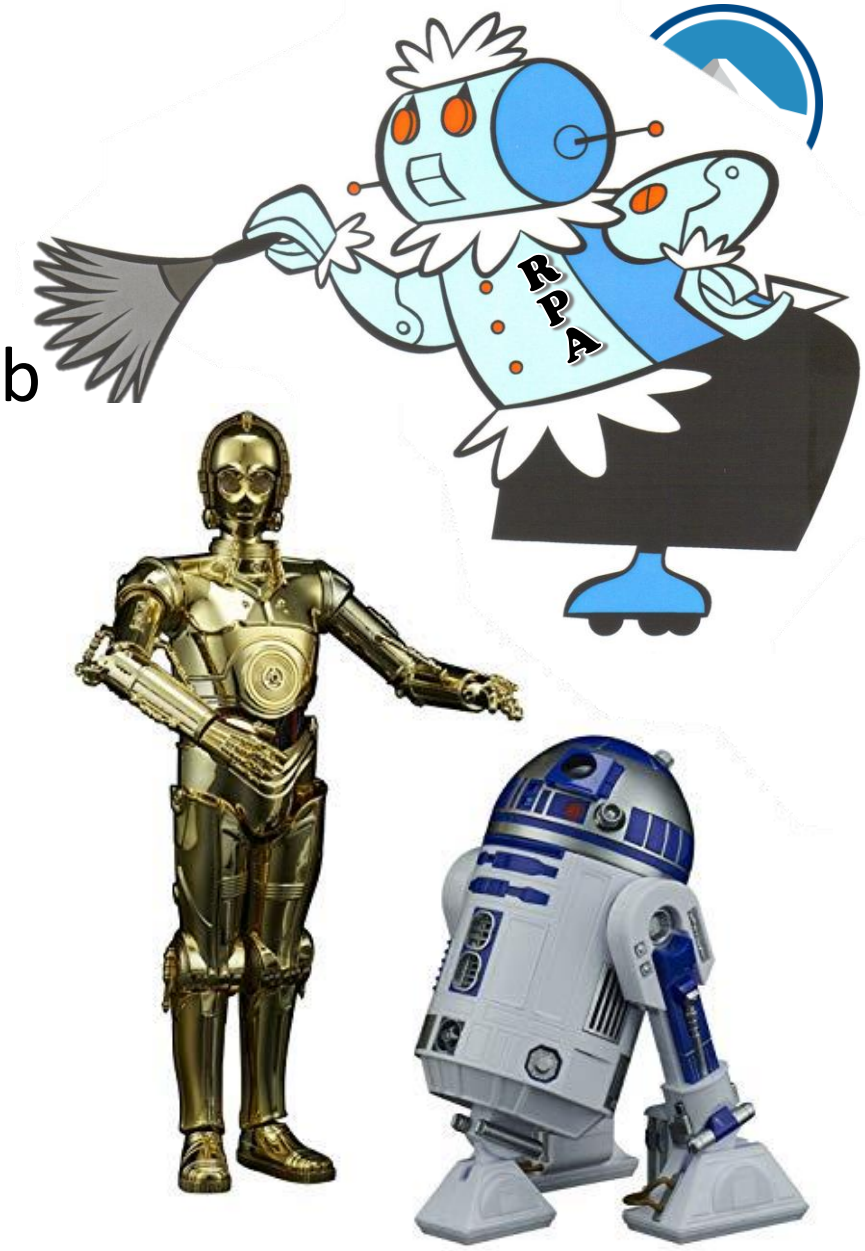
What Can RPA Bots Do?

- Pull data from Excel or CSV & enter in a web page or an application on your PC
- Extract structured data from PDF files
- Enter data into Windows applications
- Watch a folder or a data file for additions and kick off a workflow when new items appear
- Route transactions in accordance with business processes and business logic
- Create e-mails with data from inputs



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Power Apps

- Tool for creating custom apps, screens, and tools that work with workflows created in SharePoint or Power Automate
- While it is a low-code/no-code tool, it helps for users to have some prior programming experience
- Pricing is as follows:
  - $5 per user/per app/per month (includes 250 AI Builder service credits per month - or -
  - $20 per user/per mo (unlimited apps and portals, 500 AI Builder service credits per month) – or –
  - $10 per active user/per app/per mo

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Power Pages

- Tool for creating custom data-driven websites – with or without prior coding experience
- Low-code/no-code tool is highly integrated into the other Power Platform tools and also can be used with professional coding tools like Visual Studio
- Includes Dataverse storage –
  - Authenticated use model – 16 GB storage, 2 GB database capacity
  - Anonymous use model – 4 GB data storage, 0.5 GB database capacity
- Pricing is as follows:
  - Authenticated use is $200/mo for 100 users, per site, per month
  - Anonymous use is also available at $75 for 500 users/site/mo

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Power Virtual Agents

- Tool for creating chatbots which complete actions using Power Automate and also integrate with hundreds of other data sources using Power Platform connectors
- Like the other tools, no coding/AI experience is necessary
- Adds 10 GB database capacity and 20 GB file capacity to a user's Microsoft Dataverse storage
- Pricing starts at $200/mo for 2,000 chatbot sessions per month
  - Additional packs of 1,000 sessions in a month are available for $100

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Power BI

- Microsoft's business analytics platform which is also part of the Power Platform
- It focuses on data analysis, allowing users to explore, transform, and visualize data from various sources
- Users can create interactive reports and dashboards to gain insights
- Like the other Power Platform tools, no coding/AI experience is necessary, and it uses the common data connectors associated with the Power Platform
- There are two basic user plans for Power BI –
  - Power BI Pro is included with MS 365 E5 plans or is $9.99 USD/user/mo
  - Power BI Premium is $19.99 USD/user/mo

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POWER AUTOMATE

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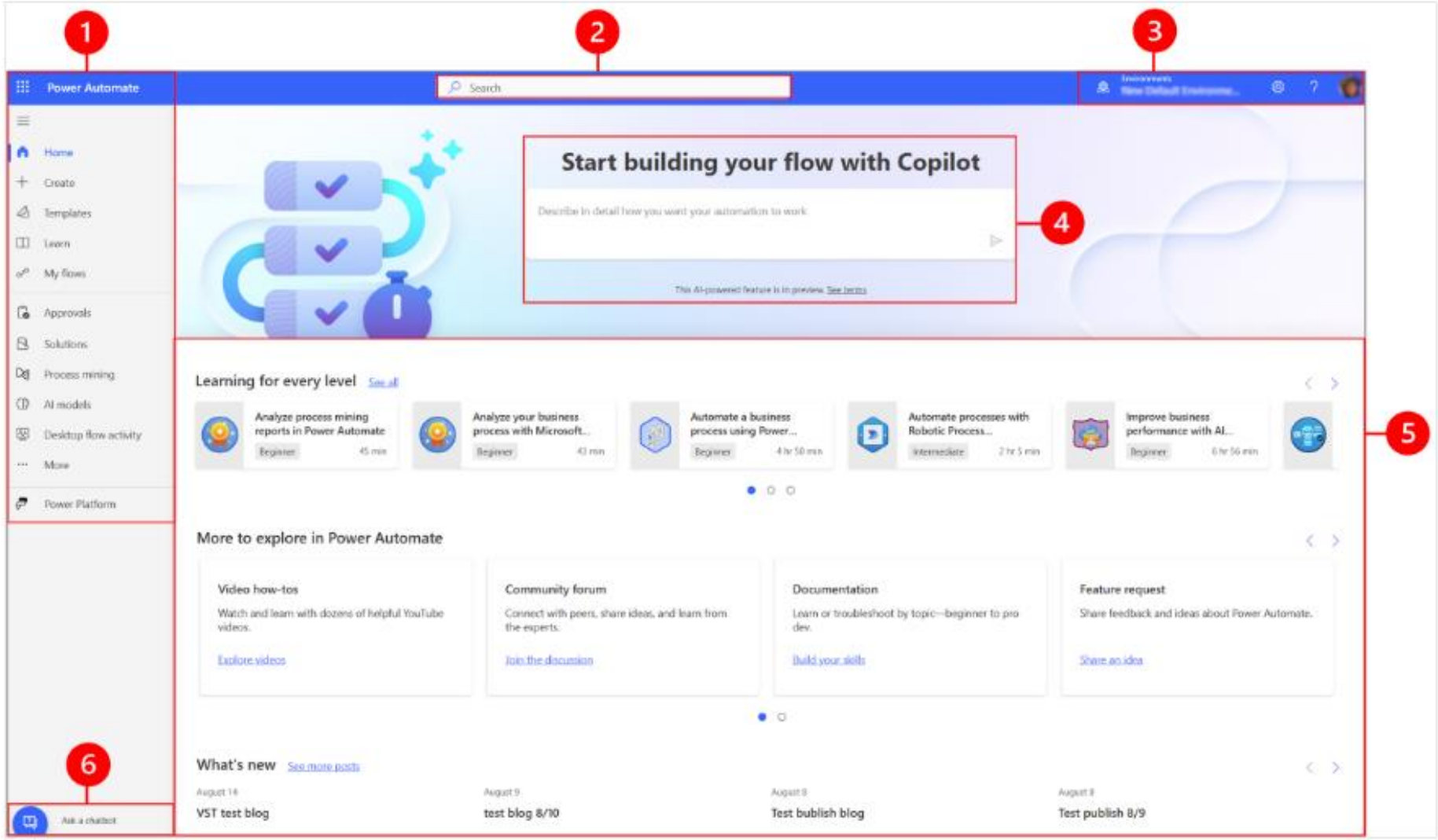
Power Automate UI



1. Left nav pane
2. Search
3. Env. info & settings
4. AI Copilot
5. Learning tools
6. Ask a chatbot

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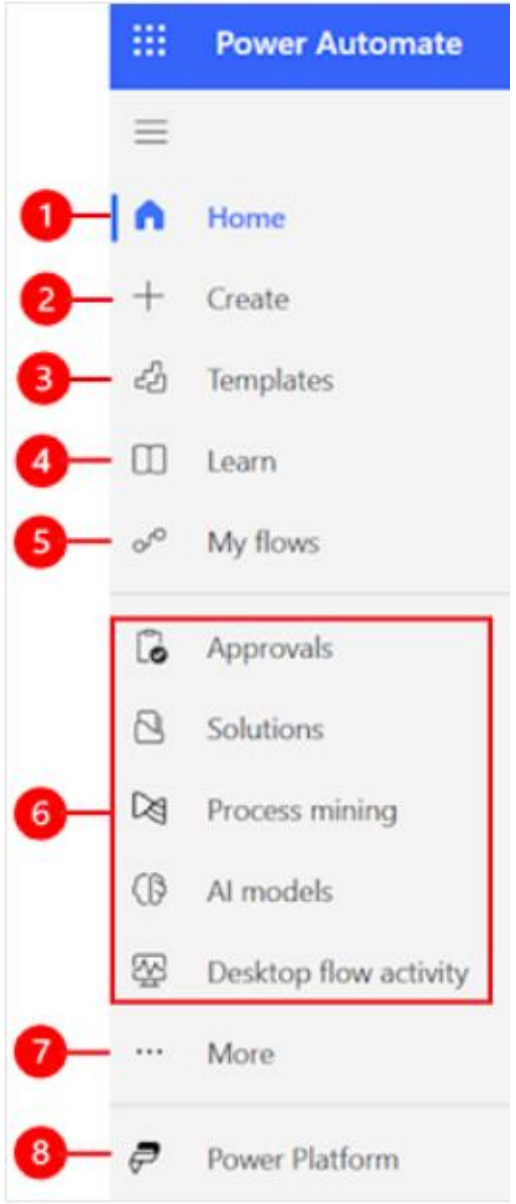

1. **Home**: Takes you to the Power Automate home page.
2. **Create**: Create flows by using Copilot, templates or build your own.
3. **Templates**: View and search for templates you can use to create flows.
4. **Learn**: Learn experience takes you to the Power Automate product documentation.
5. **My Flows**: If you've created a flow, or someone else has created one and shared it with you, you can view or edit it.
6. **Your most used pages**: When you first sign in, items such as **Approvals**, **Solutions**, **Process mining**, **AI models**, and **Desktop Flow Activity** appear in the left navigation menu by default. Use the **More** menu item to unpin any of these items and pin something else.
7. **More**: Pin your most used items to the left navigation pane, such as **Tables**, **Cloud flow activity**, **Connections**, and more.
8. **Power Platform**: Explore other Power Platform products.

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Key Terms And Concepts

While there are many important concepts to understand about automation

- **Triggers -** Events which are used to start automated processes
- **Connectors -** Software components which retrieve or store data from another application
- **Flows** - Business processes with programmable logic to assist users and their organizations by automating routing and approval of transactions
- **Expressions** - Low-code/no-code functions are libraries which help end users call libraries of code to transform the format in which information is stored within a Flow

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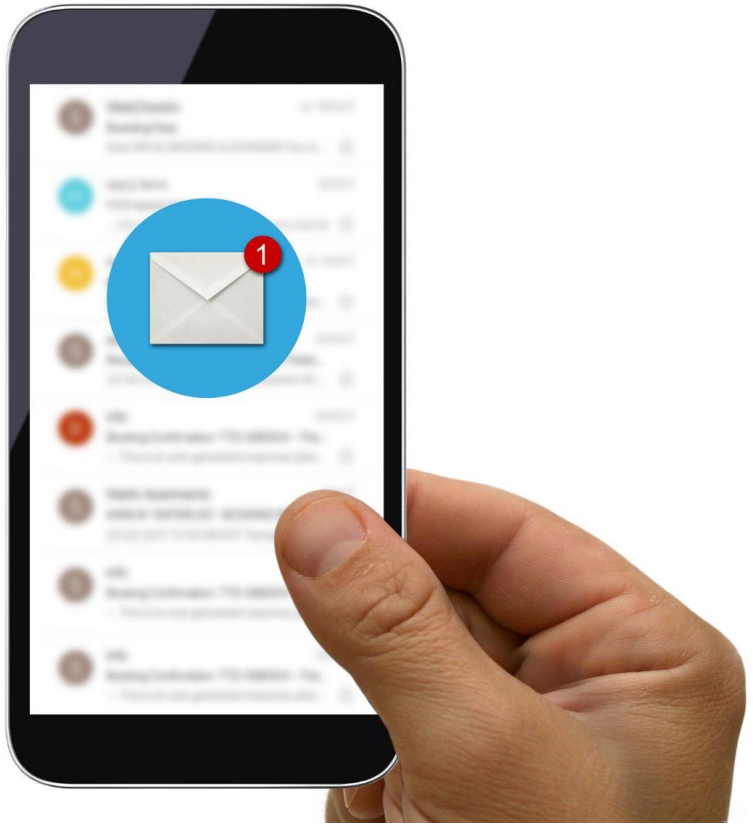
Triggers

- Triggers are events used to start a workflow automatically
- Common triggers include:
  - A new item is added to SharePoint list
  - A new e-mail or text message arrives
  - Someone fills out and submits a web form
  - An invoice is created in QuickBooks
  - Someone interacts with one of your posts on social media
  - A specific time is reached each day
- Triggers are the “lightning” that causes Power Automate to execute a workflow



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Connectors

- Connectors make it possible to integrate Power Automate with other apps and services without having to write code – they are a critical part of any low-code/no-code application
- The connectors in Power Automate can also be used with the other Power Platform tools – they represent a common set of pre-built data interfaces
- There are at least 1,000 connectors available to the Power Platform, including Salesforce, Dynamics 365, Mailchimp, Office 365, Acumatica, QuickBooks, and many more
- Users can also write and insert code and functions to accomplish a task into Power Automate if pre-built connector is not available

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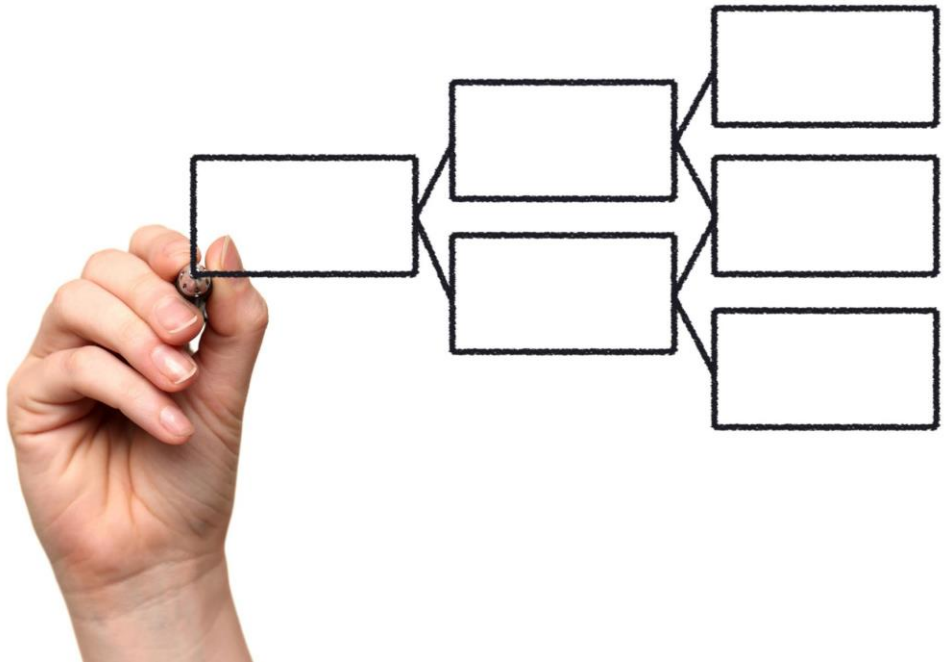
Flows

- Flows are a series of interconnected steps that automate a business process
  - Steps in a flow represent the way an organization processes a transaction like a sales opportunity or a bill payment
- Flows can be simple or complex, depending on the needs of the business, and like other applications, they can trigger other flows as needed
- Flows can use branching and looping logic to act upon a series of transactions
- The Power platform lets users create simple approval workflows with Approvals, and more complex workflows with Power Apps and Power Automate



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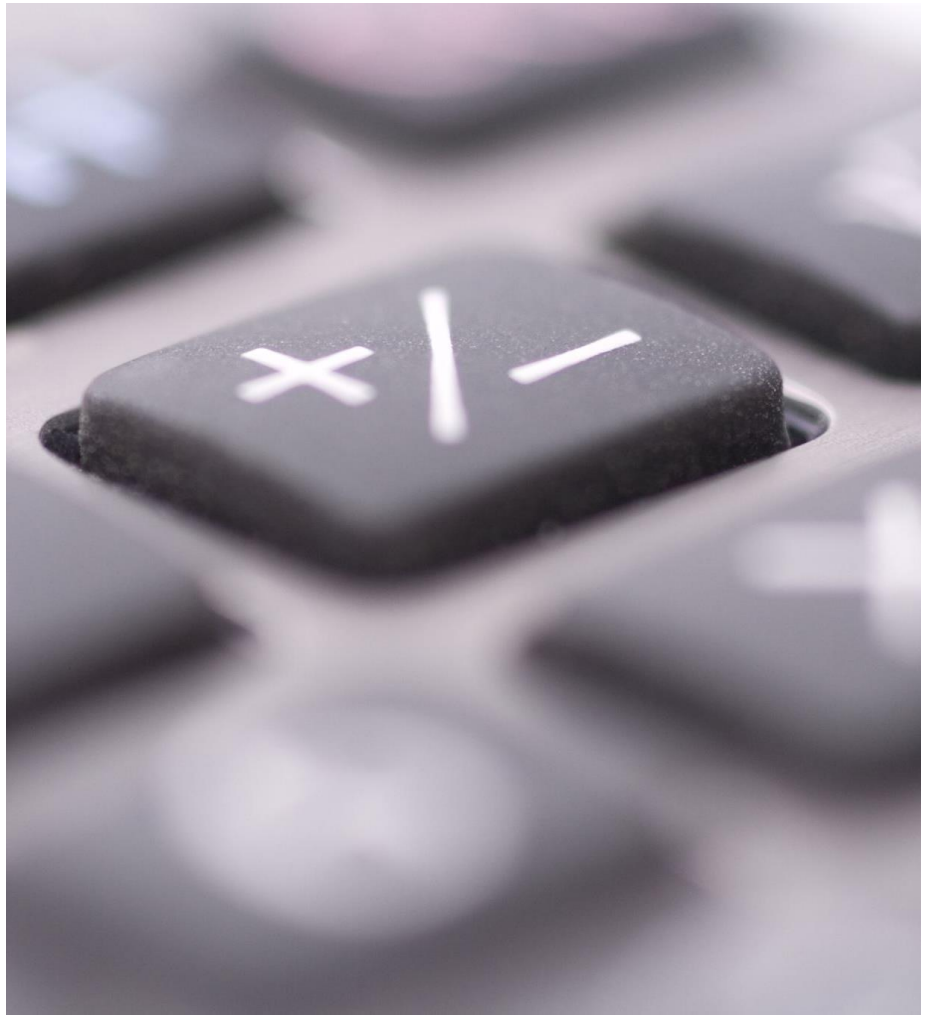
Expressions

- Expressions are used to manipulate data within a workflow
  - Expressions are the “formulas” similar to the @functions in Excel
- Expressions can be used to perform calculations, concatenate text, transform data, or perform other ministerial tasks in Power Automate – just like the functions in Excel
- Command language/syntax reference for expressions is online at http://cpate.ch/pacmds



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Creating New Flows

- Users can create a flow by:
  - Starting with one of thousands of templates
  - Starting with one of hundreds of connectors
  - Starting with a blank flow
- While Power Automate uses a simplified drag and drop interface, some users may want more help getting started
- An experimental feature called “Describe it to design it” uses generative AI to assemble the required triggers, actions, and connectors based on your plain language description
  - While these custom flows will need to be configured and checked for errors, it represents another low-code/no-code method to generate new flows

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Office Scripts vs. Power Automate

- Microsoft is in the process of replacing the Visual Basic (VBA) macros in the Windows desktop version of Excel with a new cloud and Java-based macro language called Office Scripts
- While there are similarities between Office Scripts and Power Automate (especially Power Automate Desktop), these two automation tools are largely separate but complimentary
- There are significant differences in the scope, functionality, and integrations available in each of these tools

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Office Scripts vs. Power Automate

	Office Scripts	Power Automate
Purpose	Office Scripts are a feature of **Excel Online**.	Power Automate is a **cloud-based low-code/no-code tool**.
	They enable users to **record or write scripts** that automate tasks within Excel workbooks.	It enables automation across **multiple apps and services**.
Functionality	**Automation within Excel**: Office Scripts focus on automating tasks **specifically within Excel**.	**Cross-App Automation**: Power Automate connects various Microsoft and third-party applications.
	Recording and Writing Scripts: Users can **record actions** or **manually write scripts** to perform repetitive tasks.	**Workflow Automation**: Users create automated workflows by connecting different actions.
	Workbook-Based: Scripts operate directly on **workbook data**.	**Data Flow**: It allows data to flow between apps and services.

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Office Scripts vs. Power Automate

	Office Scripts	Power Automate
How Used?	**Formatting and Calculations**: Automating formatting, calculations, and other Excel operations.	**Integration Scenarios**: Automating processes involving emails, files, databases, and more.
	Data Manipulation: Transforming and analyzing data within Excel.	**Business Process Automation**: Streamlining repetitive tasks.
Integration	**Within Excel**: Office Scripts are tightly integrated with Excel Online.	**Across Apps and Services**: Power Automate integrates with various tools beyond Excel.
	Limited External Integration: While they can be triggered by external events (e.g., emails), their primary focus is on Excel workbooks.	**Dynamic Content**: Data can be passed between flow actions using static values, expressions, or dynamic content.

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USES OF POWER AUTOMATE

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Power Automate

Cloud Flows	• Trigger automation instantly, based on either a “trigger” or a schedule
Desktop Flows	• Use robotic process automation (RPA) to perform repetitive tasks with legacy Windows applications
Business Process Flows	• Provide automation and execution of business logic associated with business processes

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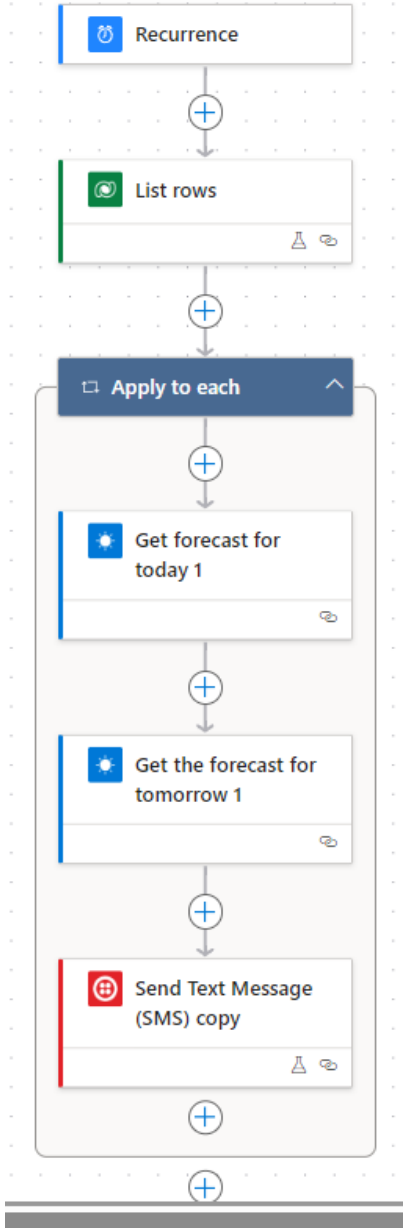
Cloud Flows

- Trigger automation instantly, based on either a “trigger” or a schedule
- **Example:** Send the weather for each record in a SharePoint List at 5:15 AM ET every day. Each row in the list contains the name of the recipient, the recipient’s cell phone number, and the zip code for the forecast
  - **Event**: Start when the current time is 5:15 AM ET
  - **Connections:** MSN Weather, SharePoint, Twilio (for SMS messaging), and MS Dataverse



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Desktop Flows

- Are a form of Robotic Process Automation (RPA), which is similar to macros which can access and can move data between most applications in Windows in a manner similar to “macros”
- Make it possible for you to automate processes which run on your local computer - even those which do not have an API
  - If you can interact with it using a keyboard and a mouse, you can most likely configure a desktop flow (bot) to do repetitive tasks with this tool
- Can be used with most applications – including legacy applications - which are accessible by a user on a Windows PC

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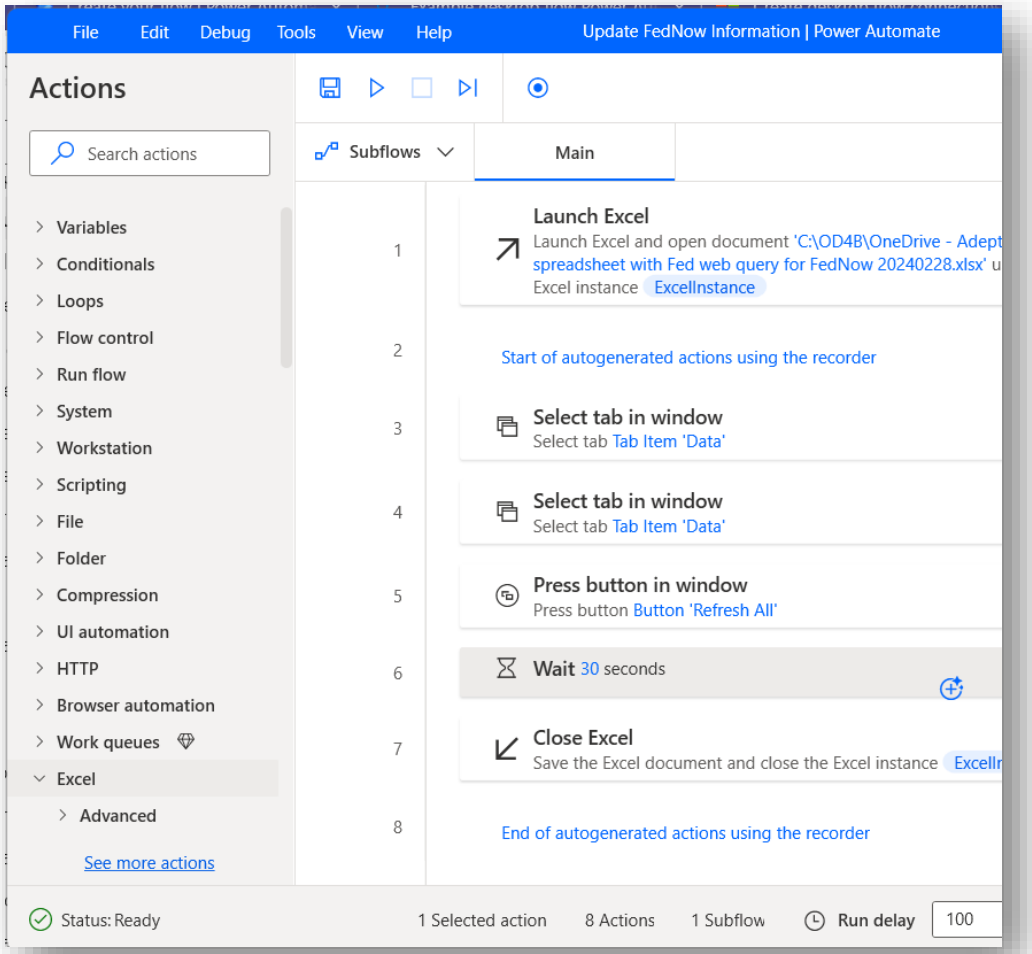
Desktop Flows

- Desktop flows require the Power Automate Desktop app on a local computer or on a cloud-based virtual machine
- Users can use drag and drop, a “step recorder” or computer code to create and edit the tasks to be automated
- Since these routines require rote memorization of screens, steps must often be adjusted for changes in the menu structure or the user interface of legacy applications



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Desktop Flows

- Power Automate Desktop lets you perform tasks like:
  - Copy data out of a spreadsheet into a web form
  - Update data sets from web queries with power query on an automated basis
- **Example:** Update of web query in Excel which gets the lists of institutions, settlement agents, and service providers for the FedNow instant payment service from the Federal Reserve website

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https://www.frbservices.org/financial-services/fednow

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The Federal Reserve's FedNow Service is an instant payments infrastructure that allows participating banks and credit unions to send and receive transactions within seconds on behalf of their customers — 24 hours a day, seven days a week.

This page lists **participating financial institutions** that are currently live on the service, as well as financial institutions serving as **settlement and liquidity providers**. Financial institutions that have completed testing and certification will be added to the list once they are live on the service.

Also listed are **certified service providers** that have completed testing certification to support payment processing for participants. More information about the offerings of these organizations — and those of other vendors that support instant payment services such as bill pay, payroll processing, digital wallet and API development — may be found at the FedNow Service Provider Showcase (Off-site).

Table of Contents

- Participating Financial Institutions
- Settlement Agents and Liquidity Providers
- Certified Service Providers

Certified Service Providers

Certified Service Providers

Organization Name	Participation Types			
	Receive Only	Send and Receive	Receive RFP*	Liquidity Management Transfer
ACI Worldwide Corp.	•	•	•	•

Settlement Agents and Liquidity Providers

Settlement Agents and Liquidity Providers

Organization Name	City	State
Alloya Corporate Federal Credit Union	Naperville	Illinois

Participating Financial Institutions

Participating Financial Institutions

Organization Name	City	State
1st Bank Yuma	Yuma	Arizona
1st Source Bank	South Bend	Indiana
Abbott Laboratories ECU	Gurnee	Illinois
ACCESSbank	Omaha	Nebraska
Addition Financial Credit Union	Lake Mary	Florida
Advantage One Credit Union	Brownstown	Michigan
Adyen	San Francisco	California

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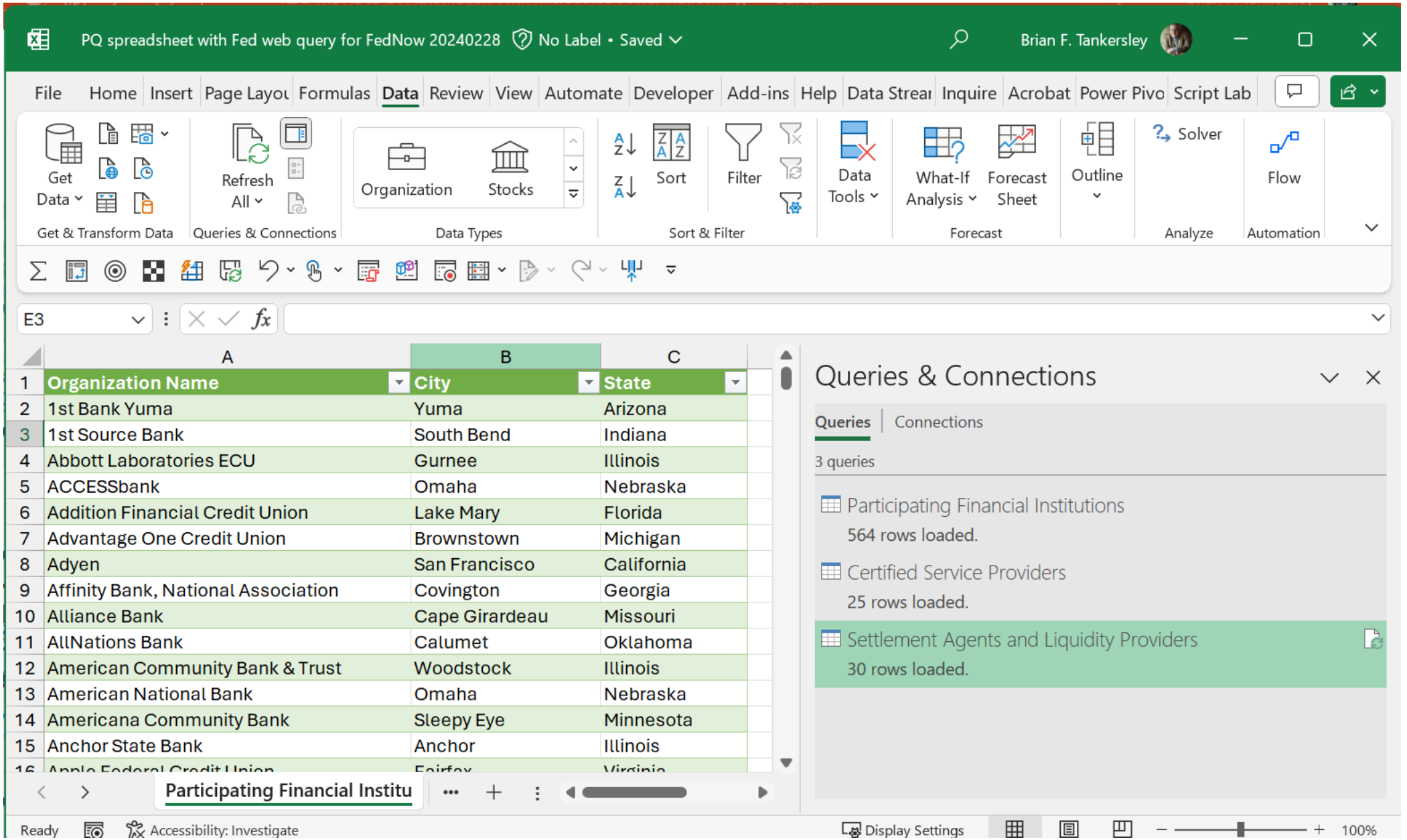

	A	B	C
1	Organization Name	City	State
2	1st Bank Yuma	Yuma	Arizona
3	1st Source Bank	South Bend	Indiana
4	Abbott Laboratories ECU	Gurnee	Illinois
5	ACCESSbank	Omaha	Nebraska
6	Addition Financial Credit Union	Lake Mary	Florida
7	Advantage One Credit Union	Brownstown	Michigan
8	Adyen	San Francisco	California
9	Affinity Bank, National Association	Covington	Georgia
10	Alliance Bank	Cape Girardeau	Missouri
11	AllNations Bank	Calumet	Oklahoma
12	American Community Bank & Trust	Woodstock	Illinois
13	American National Bank	Omaha	Nebraska
14	Americana Community Bank	Sleepy Eye	Minnesota
15	Anchor State Bank	Anchor	Illinois
16	Apple Federal Credit Union	Fairfax	Virginia

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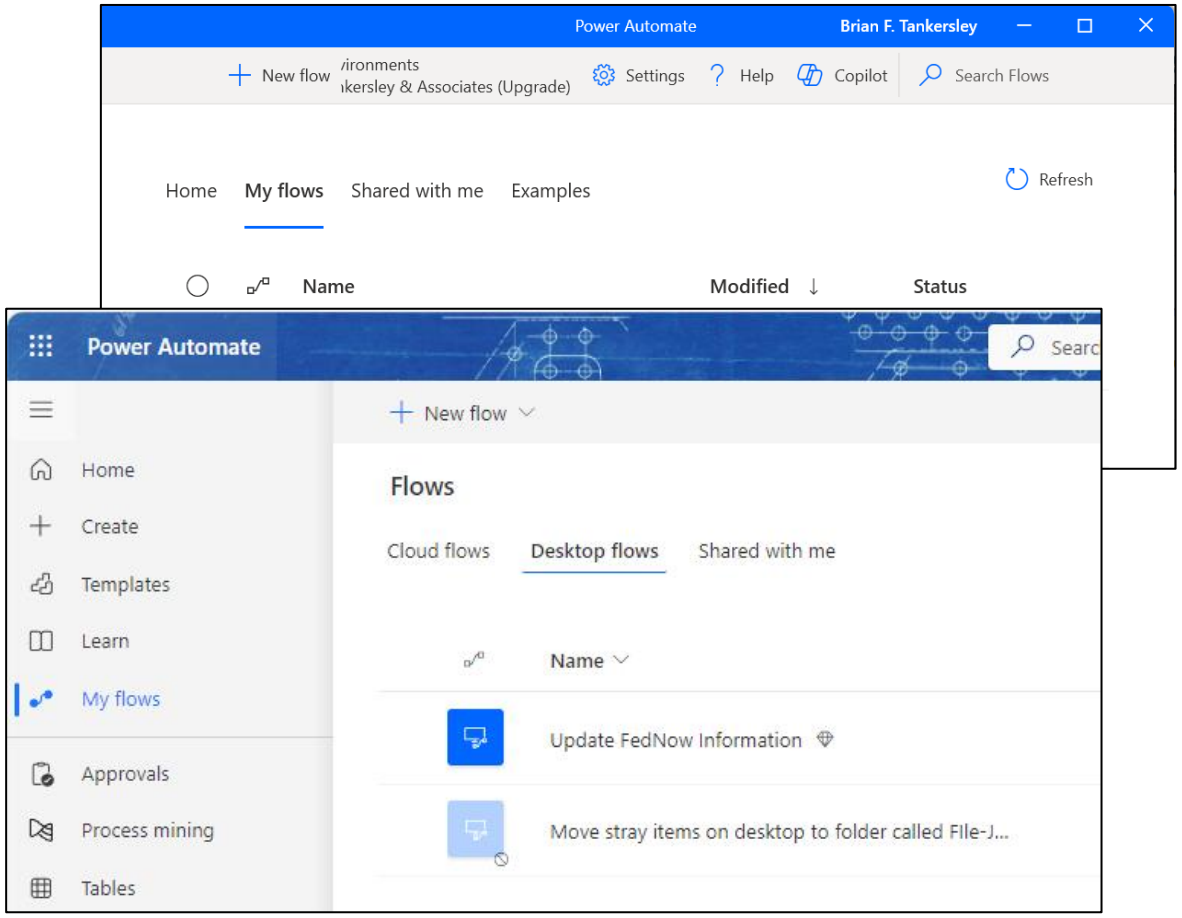
Desktop Flows

- To run this demo, you will need to
  1. Add the spreadsheet to a folder in your OneDrive or on SharePoint
  2. Install the Power Automate Desktop app from the Microsoft Store
  3. Import the workflow into Power Automate and connect it to your Microsoft Power Automate account
  4. Configure the flow in Power Automate to point at the sample spreadsheet on your local PC
- Once you have set all of this up, you can then execute the flow from within the Power Automate Desktop application or from the Desktop Flows tab under “My Flows” on the Power Automate website



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Business Process Flows In Power Automate

- Power Automate is a tool for creating event-triggered dataflows between hundreds of applications
- Business logic/rules can be added to a data flow/workflow using a low-code/no-code approach
- Provides automation and execution of business logic associated with business processes
- Business process flows are a key component of digital business transformation, which uses automation to complete business workflows

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Business Process Flows

- Microsoft made some changes to Power Automate in 2022 which moved much of the functionality associated with Business Process Flows into the Power Apps environment
- While there is a Copilot which can create flows using generative AI within Power Apps, the complexity of managing the user interface, data flows, and actions puts this solution beyond the capabilities of most end users
- Users CAN create simple flows which are event triggered and work together to accomplish many tasks similar to those in business process flows, especially with the RPA capabilities of Power Automate Desktop

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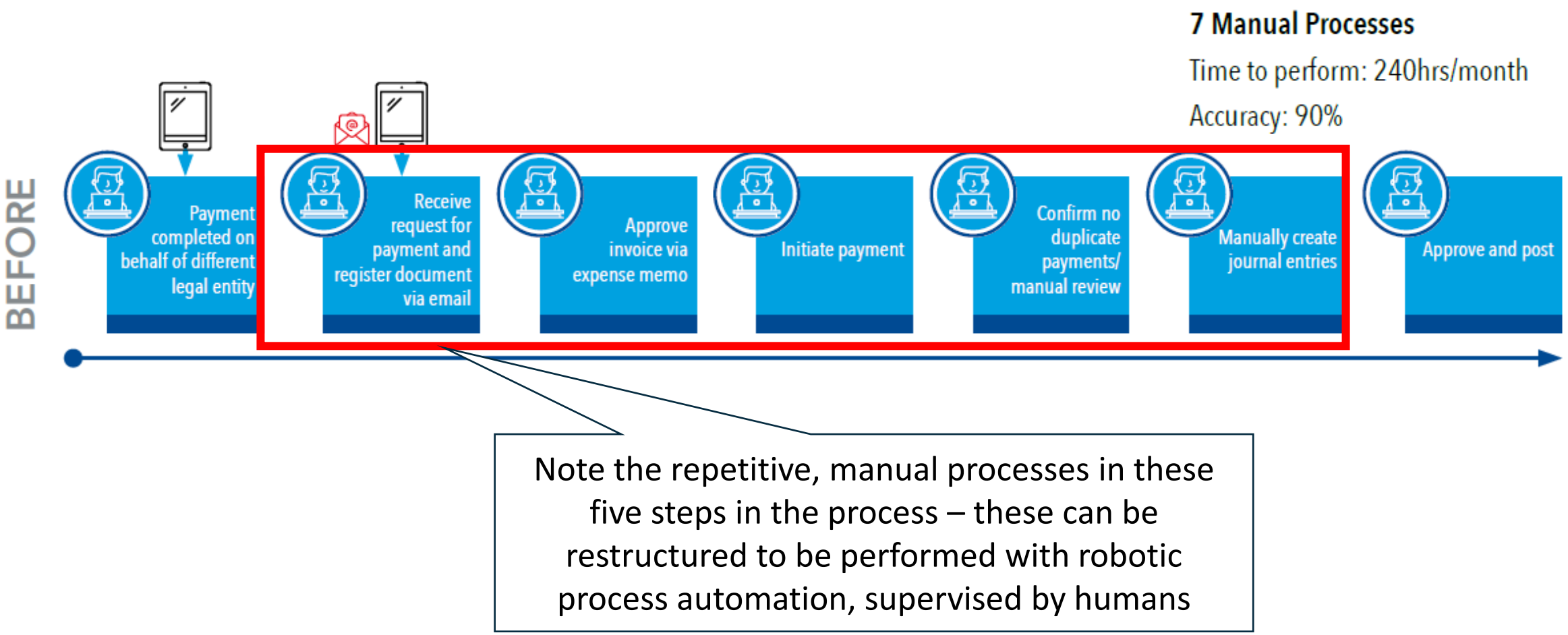
Intercompany Transaction Processing



Note the repetitive, manual processes in these five steps in the process – these can be restructured to be performed with robotic process automation, supervised by humans

Source: Embracing Robotic Automation During the Evolution of Finance; ACCA, CAANZ, and KPMG

Source: Embracing robotic automation during the evolution of finance; ACCA, CAANZ, and KPMG

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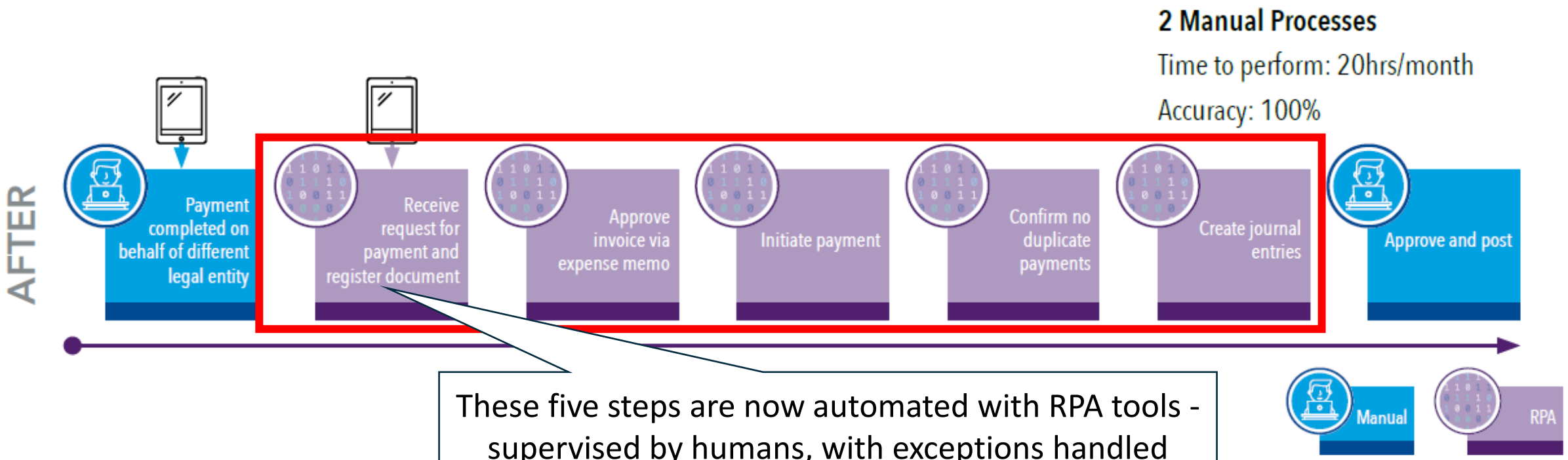
Intercompany Transaction Processing



These five steps are now automated with RPA tools - supervised by humans, with exceptions handled manually and data used to update the business logic programmed into the process platform

Source: Embracing Robotic Automation During the Evolution of Finance; ACCA, CAANZ, and KPMG

Source: Embracing robotic automation during the evolution of finance; ACCA, CAANZ, and KPMG

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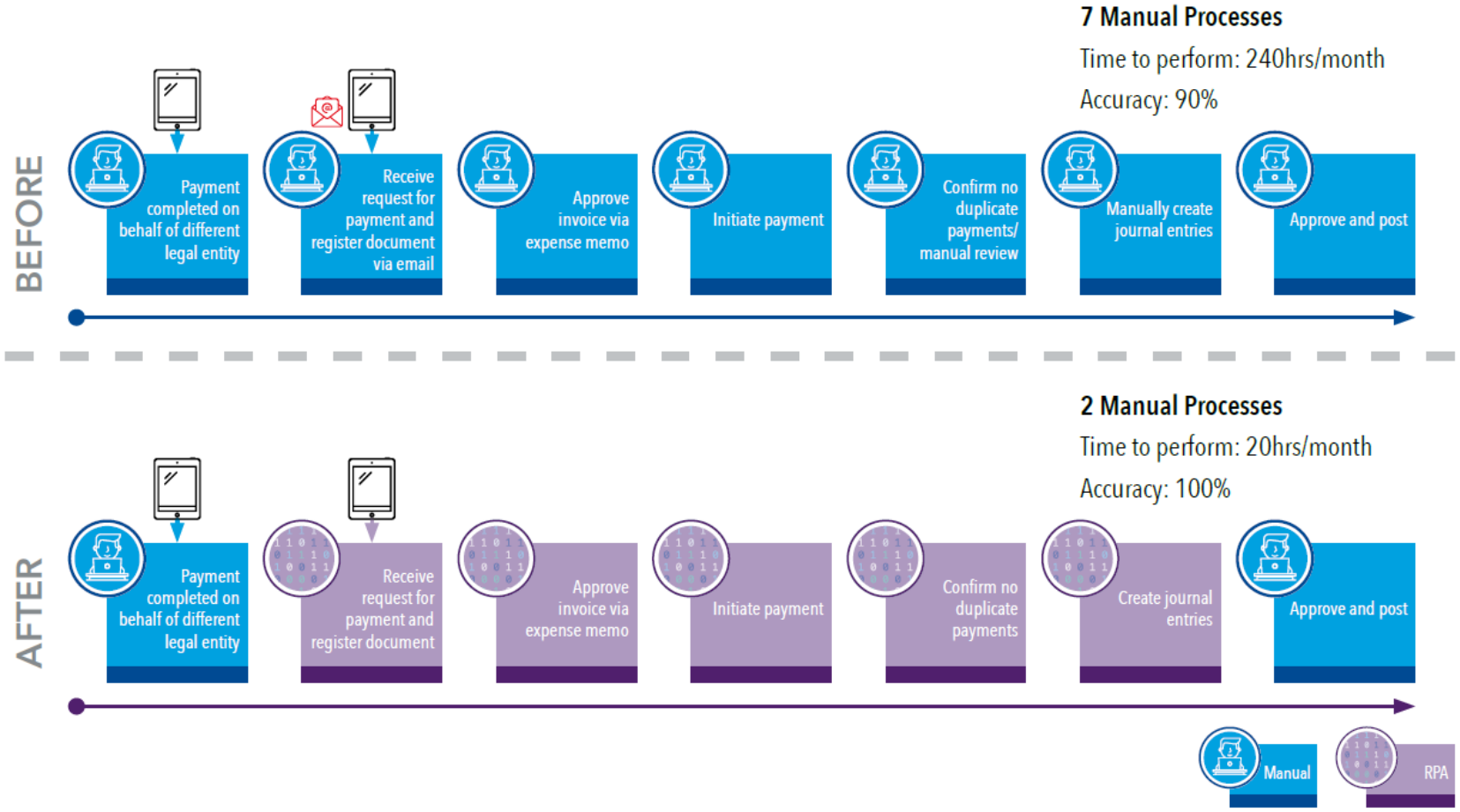
Intercompany Transaction Processing



Source: Embracing Robotic Automation During the Evolution of Finance; ACCA, CAANZ, and KPMG

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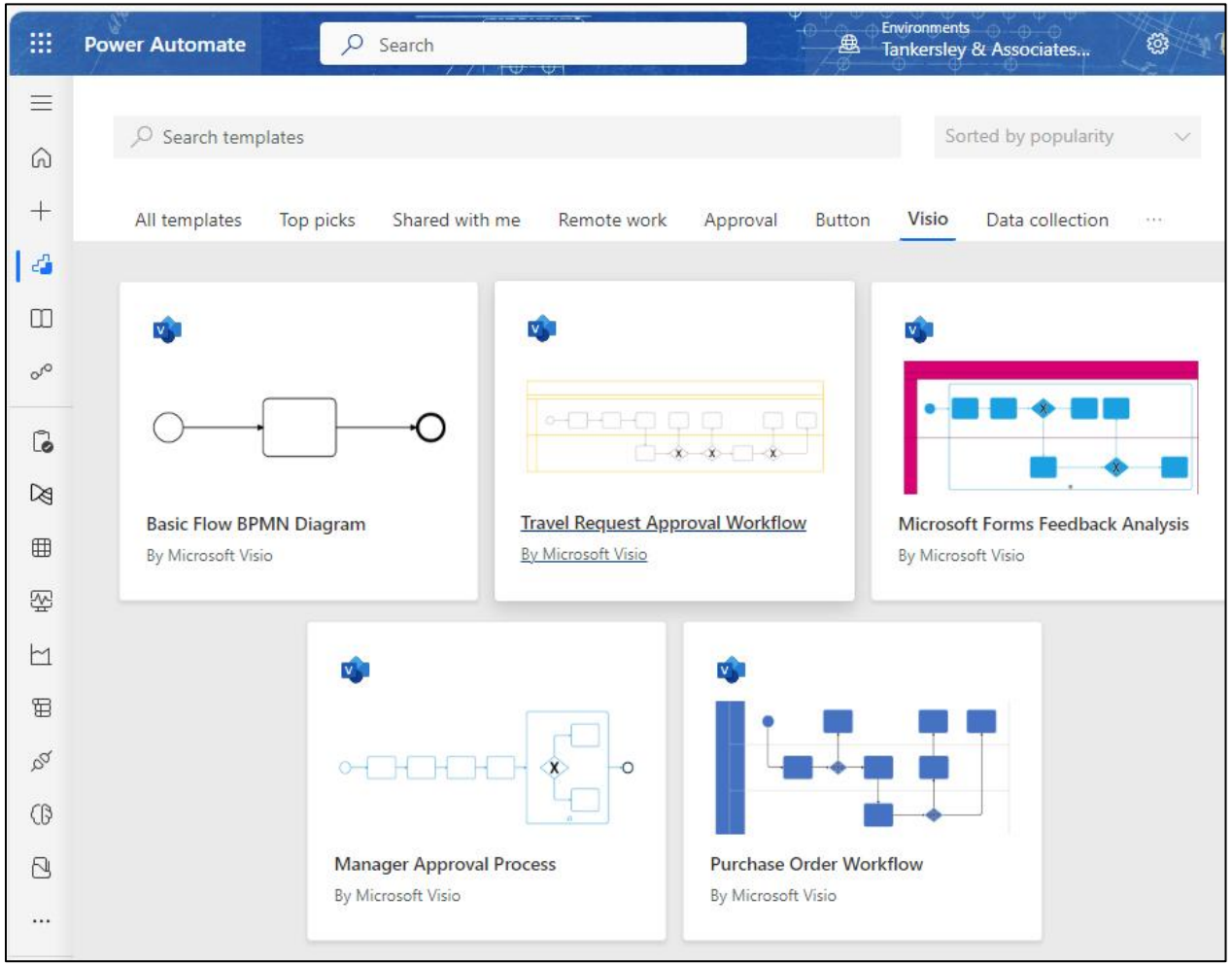
Business Process Flows

- Microsoft Visio Plan 2 users (English only) can use templates to create exportable workflows in Power Automate using BPMN diagrams
- You can learn more about using Visio with Power Automate by visiting https://cpate.ch/visiopa



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Approvals

- Approvals are a Power Automate feature for business processes that is designed to create lists of requests which can be acted on electronically
- Approvals can be added as an application within Teams so that users can request and give approvals in a familiar interface
- Microsoft provides a number of templates for common simple approval processes such as:
  - Maintenance requests
  - Shift swaps
  - Expense reimbursement
  - Paid time off requests
- Approvals integration with Teams means that users can access their approval requests and required actions from within Teams on computers, tablets, mobile phones, and in a web page – literally anywhere they are online

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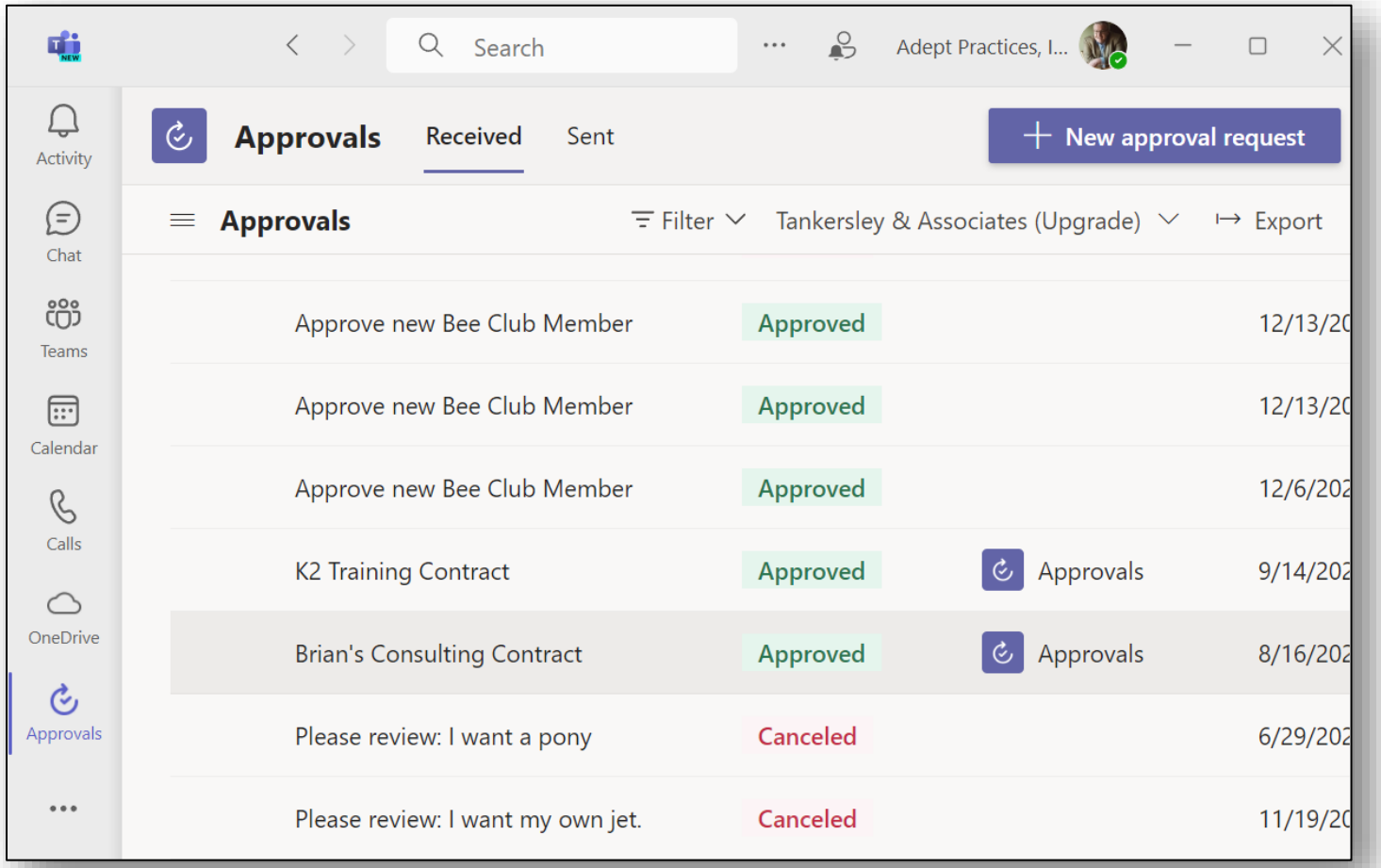
Approvals

- Approvals in Teams provides an app interface which shows both requests which have been sent as well as received requests
- The app can also work with approvals from other platforms such as Adobe Sign



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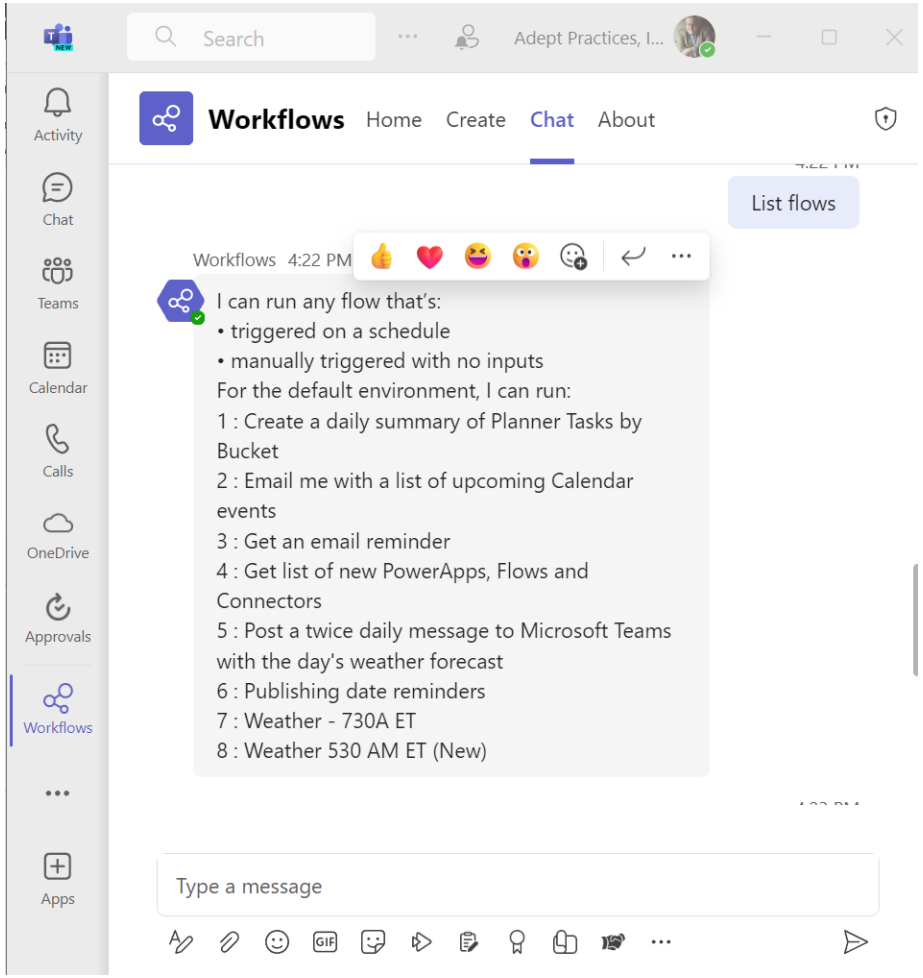
Workflows In Teams

- The optional Workflows app in Teams allows users to add, edit, execute, and disable Power Automate workflows
- The “Home” tab in this Teams app shows a list of all the flows that are integrated with Teams
- A chatbot in the application can be used to activate flows that are triggered by a schedule or those that are manually triggered



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DEMONSTRATION OF PLATFORM USE

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Demonstrations - Forms

- **Target Audience:** End users who just need a simple way to collect data
  - Can be used by IT pros, but is somewhat simplified for their needs
  - Can be used to create polls during presentations with real-time status
- **Automation:**
  - Can be used as a trigger to launch a Power Automate workflow and data can be stored in a SharePoint list or other data store
  - Can do light branching logic, but probably not the best tool for those who need very sophisticated rule sets (e.g. large surveys)
- **Location of Tool**: https://Forms.Microsoft.com

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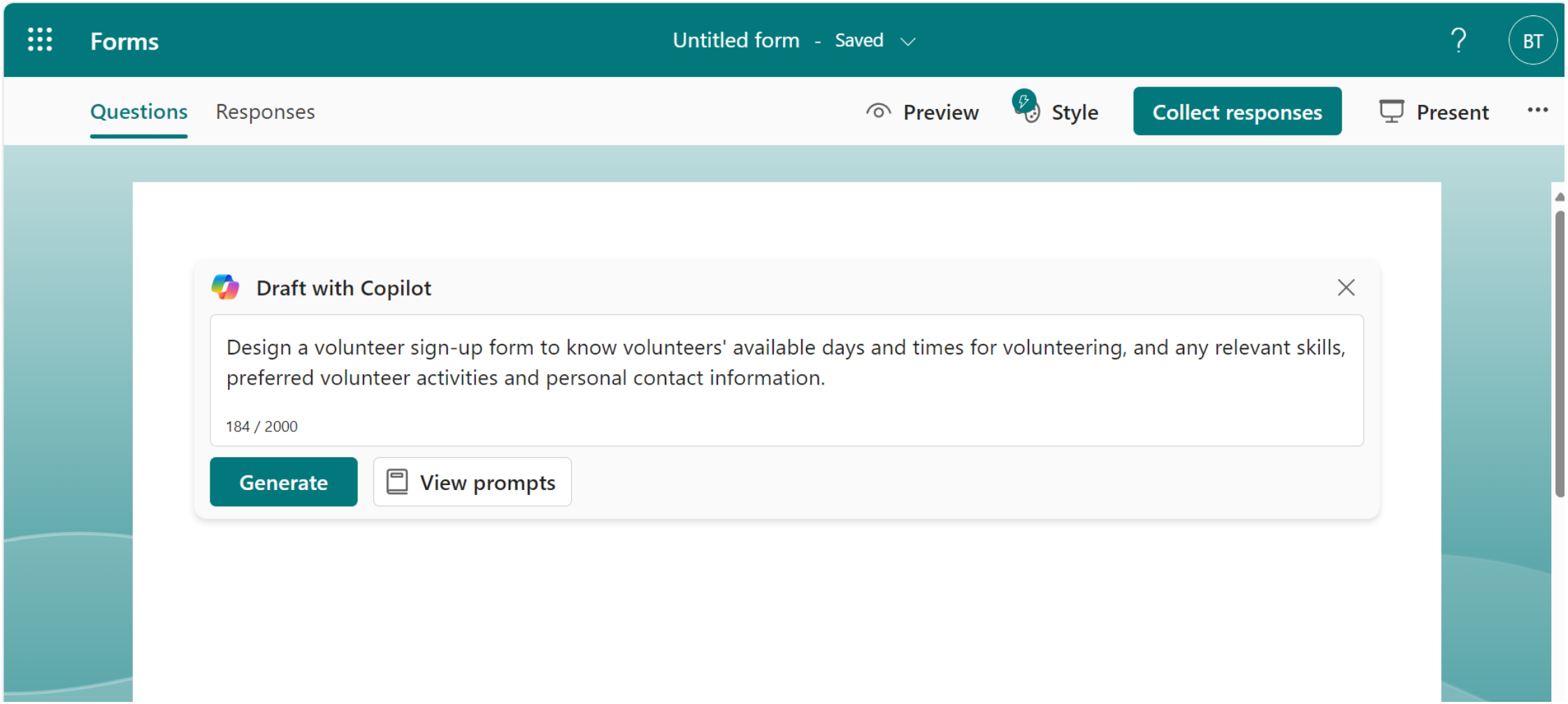
Forms – Draft With Copilot



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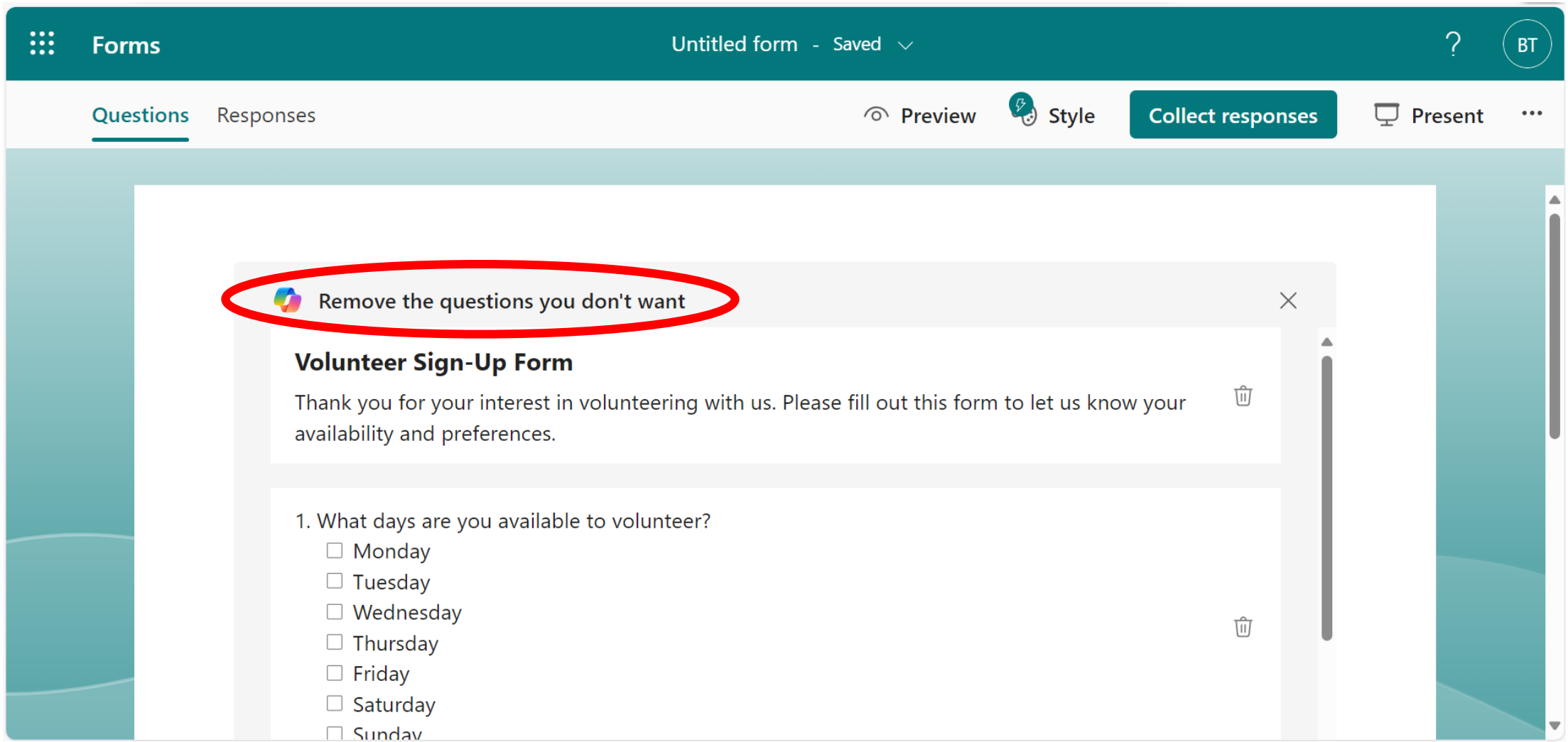
Forms – Draft With Copilot



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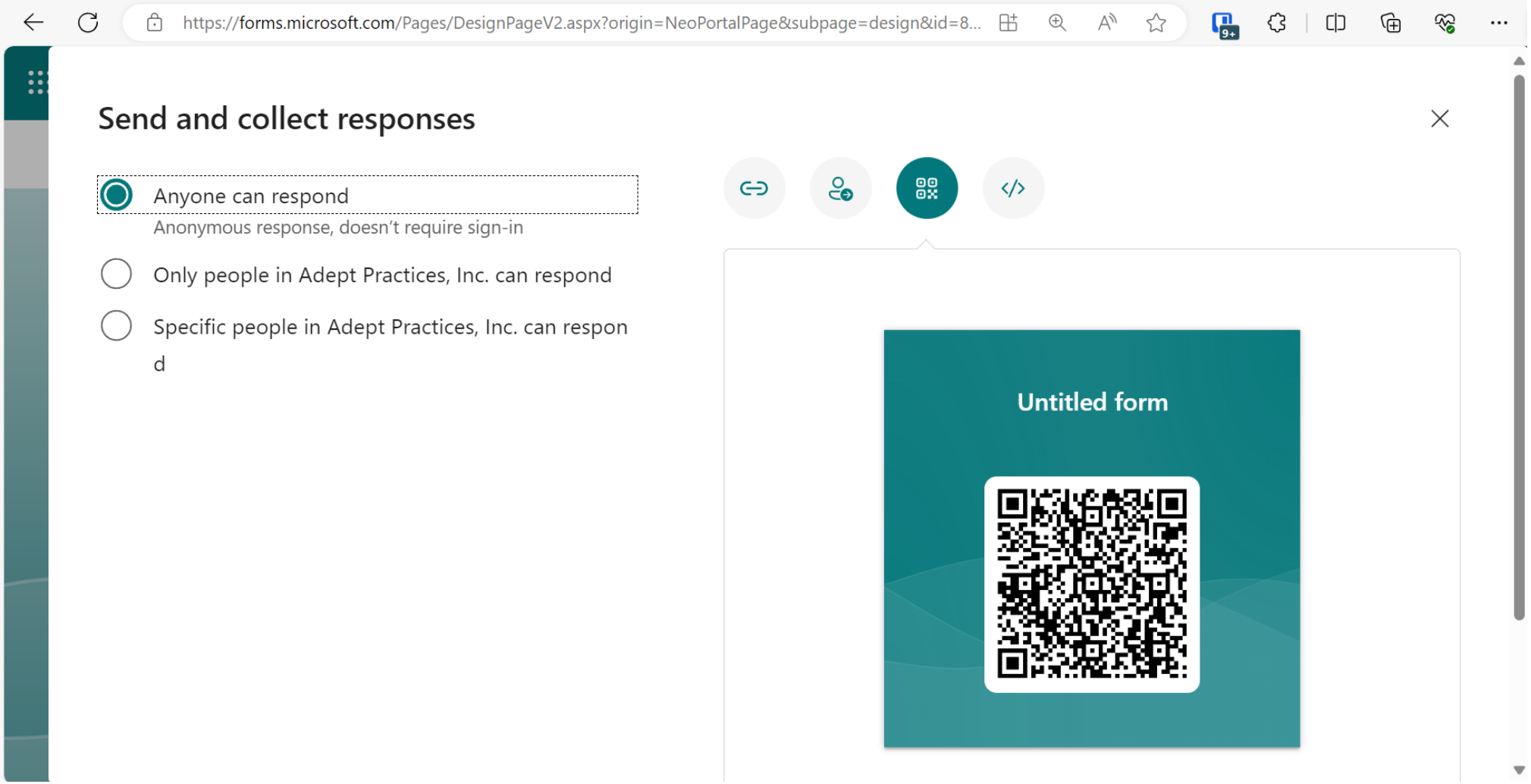
Forms – Draft With Copilot



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Demonstrations – Lists

- **Target Audience:** End users and IT pros who need to store/retrieve data and tasks as part of process automation
  - Lists are easy enough for non-technical users to create and maintain
  - Lists integrates with SharePoint and the Power Platform so enterprise and IT users can access more sophisticated tools for automation and compliance
- **Automation:**
  - Can be used by non-technical users to define columns, set up rules, and create views to organize and manipulate data
  - More technical users can use other Power Platform tools for more integration
    - Power Apps and SharePoint can access data in a form or view
    - Power Automate can read/write/display data in Lists
    - Power BI can report on Lists activity
    - Power Pages and Power Virtual Agents can also access Lists data if needed
- **Location of Tool**: https://cpate.ch/mslists

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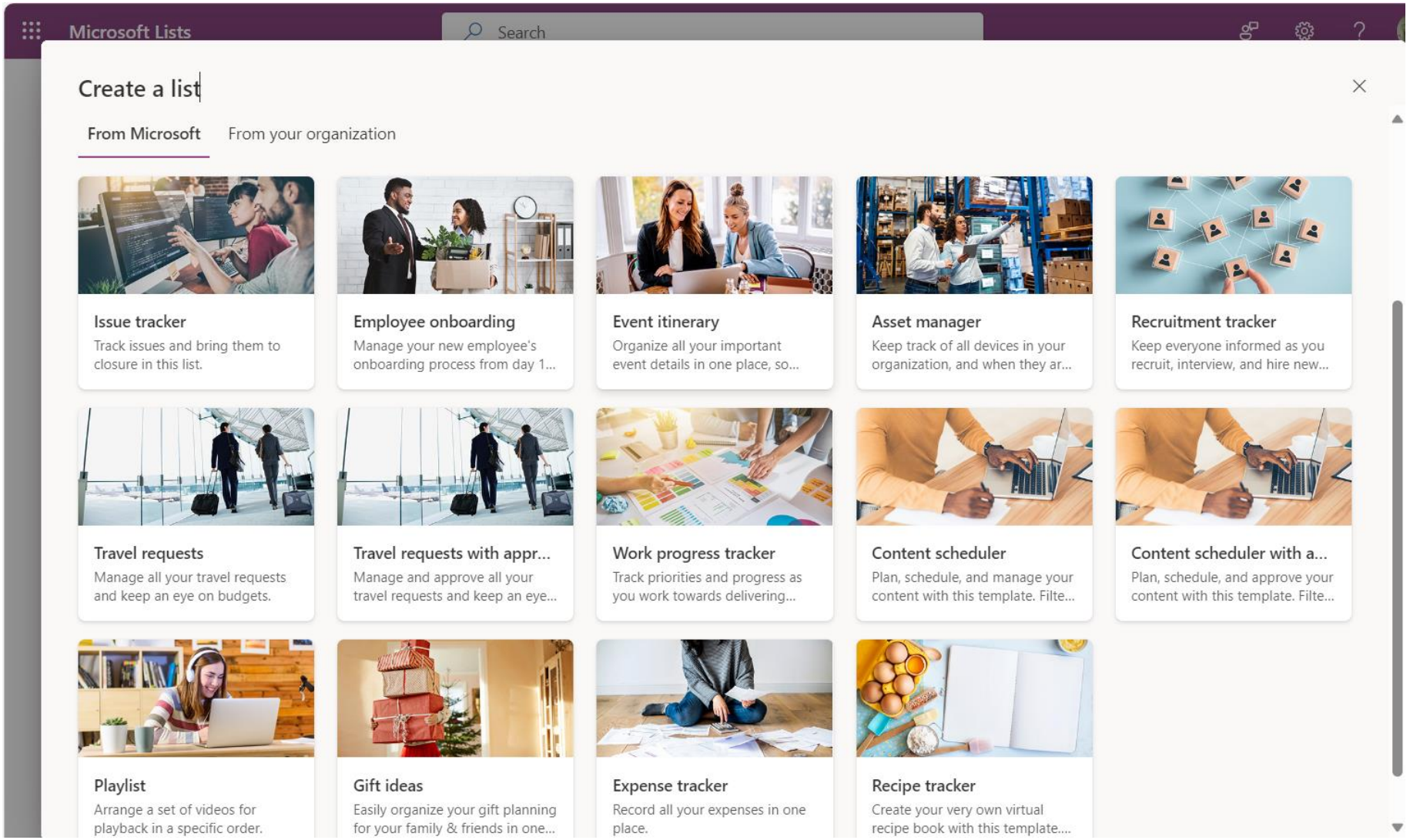
Microsoft 365 Lists - Templates



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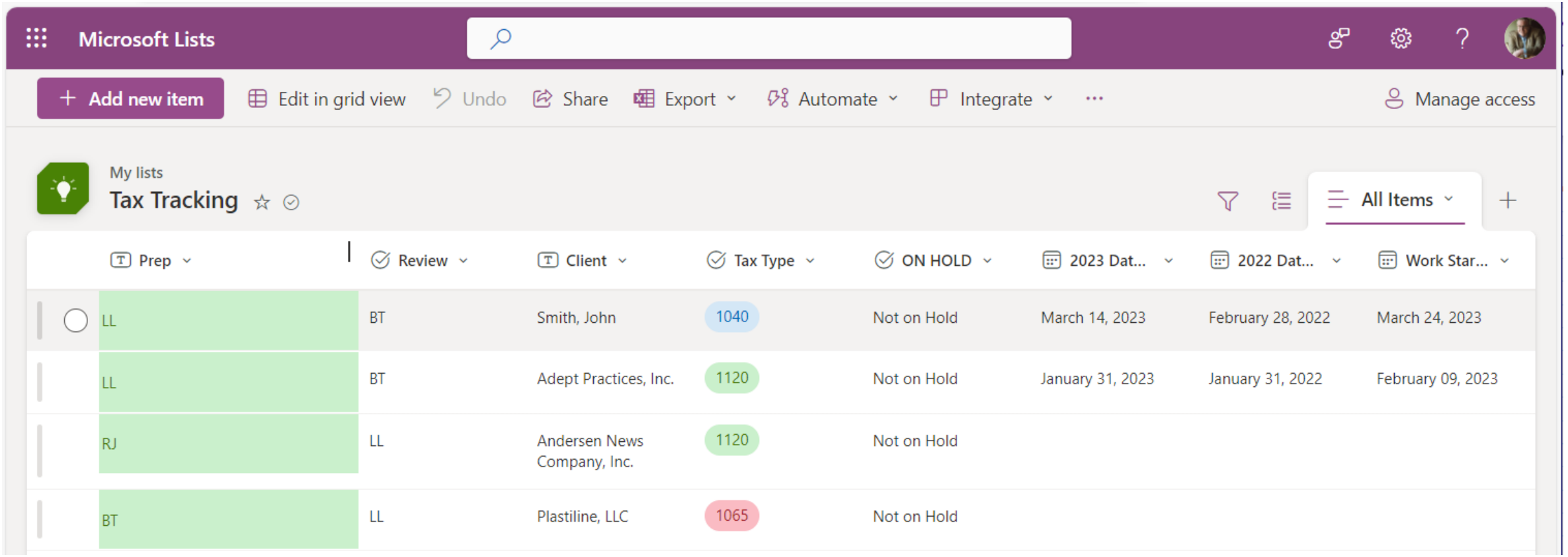
Microsoft 365 Lists - Templates



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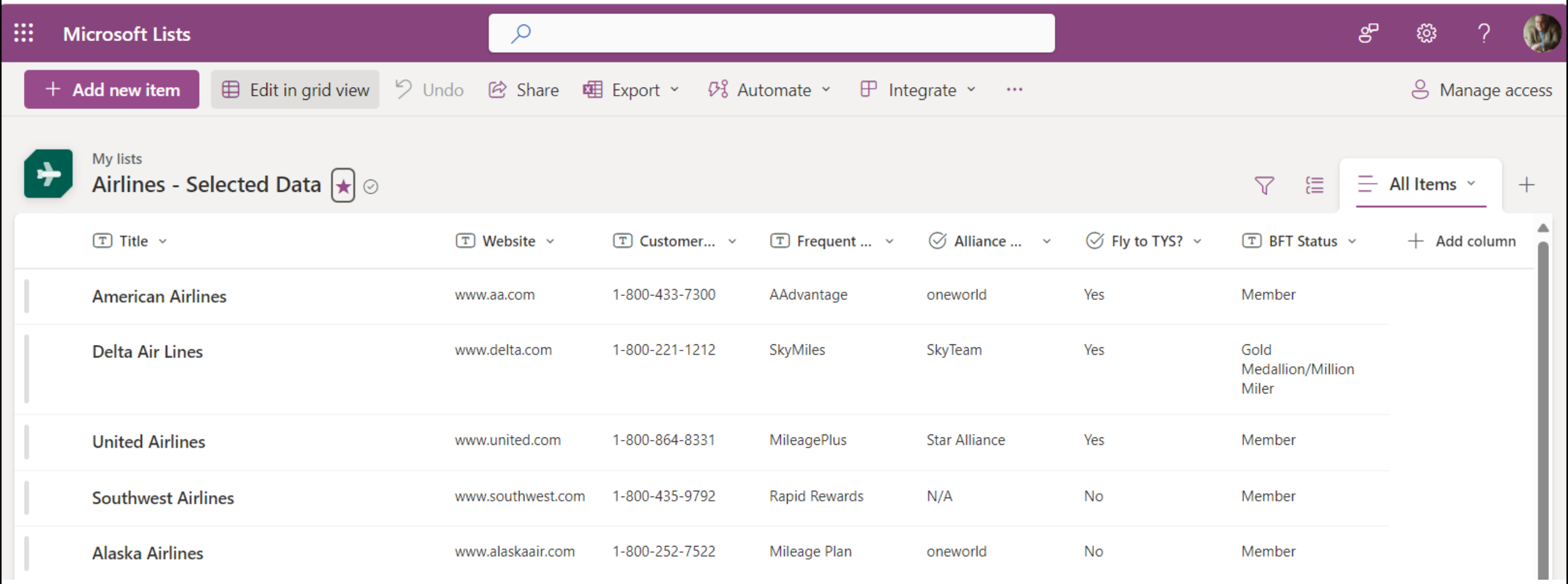
Microsoft 365 Lists – Create List From Excel



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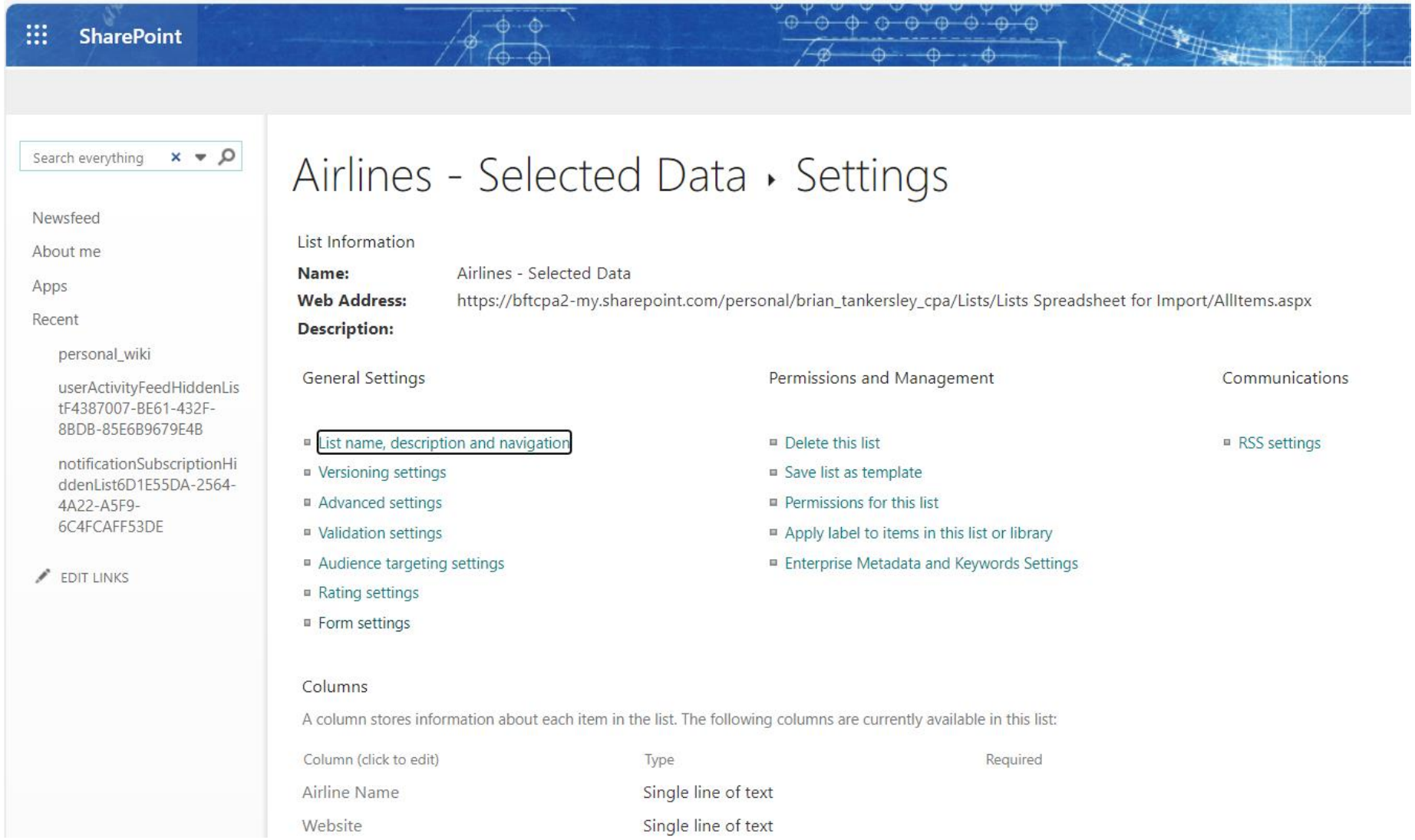
Microsoft 365 Lists - SharePoint



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Demonstrations – Power Automate

- **Target Audience:** More sophisticated end users and IT pros who need to create process automation
  - Can be used by end users with Copilot, but configuration/ troubleshooting is likely beyond their skills and Copilot solutions often have flaws/bugs
  - Can be used with Power Apps and other more sophisticated tools to create very sophisticated workflows, although the complexity may require stronger programming/database skills than most users possess
- **Automation:**
  - Good as a low-code/no-code tool for most sophisticated users and IT pros
  - Can integrate with hundreds of third-party tools (e.g. Twilio for SMS)
  - IT pros can set up flows and they can be modified by end users if desired
  - Also offers RPA through Power Automate Desktop
- **Location of Tool**: https://PowerAutomate.com

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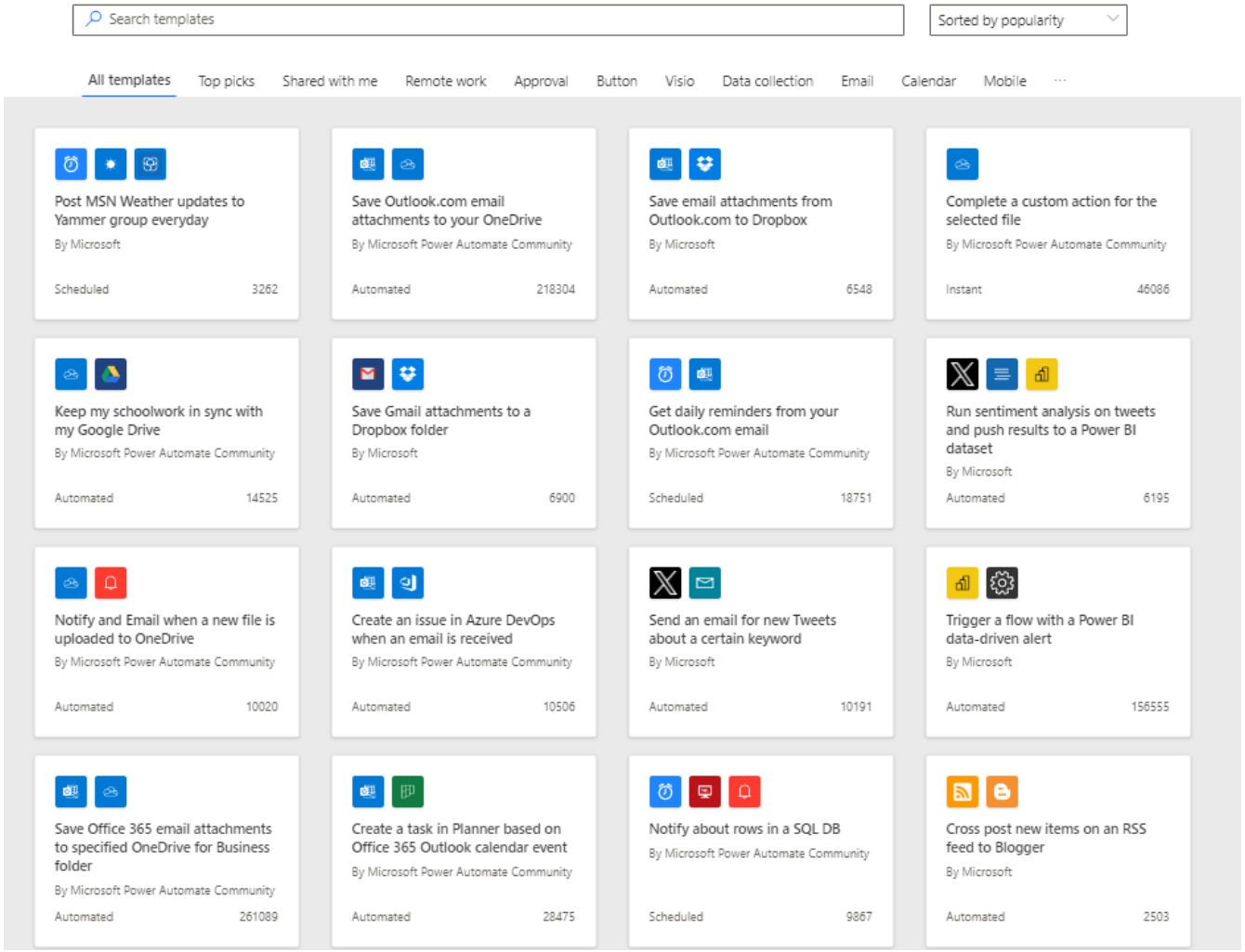
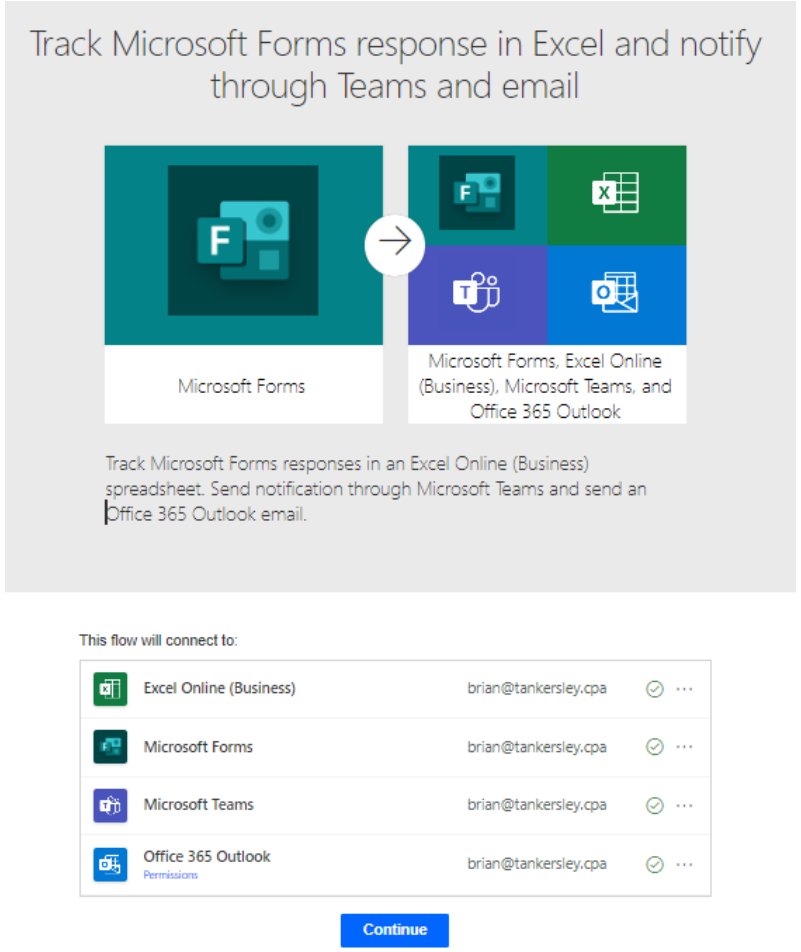
Power Automate – Templates





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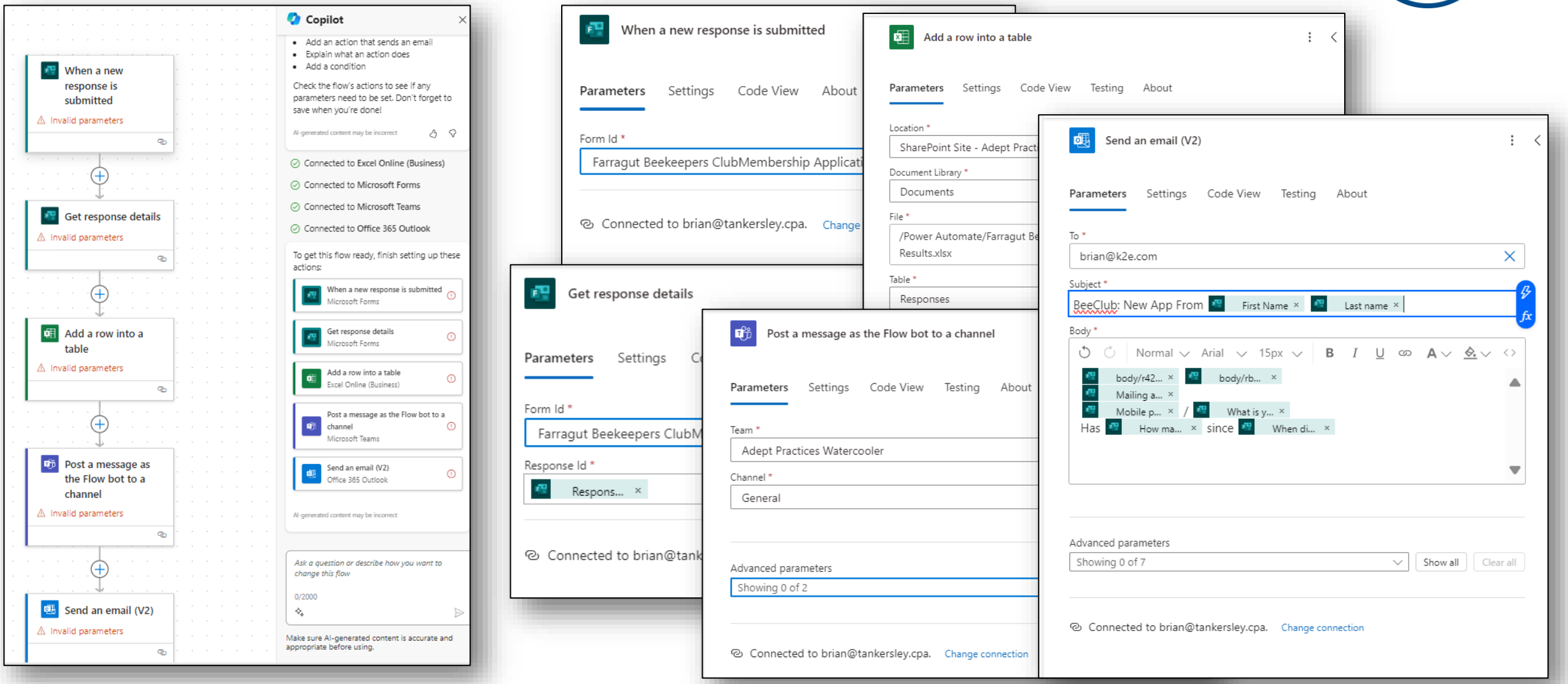
Power Automate – Templates



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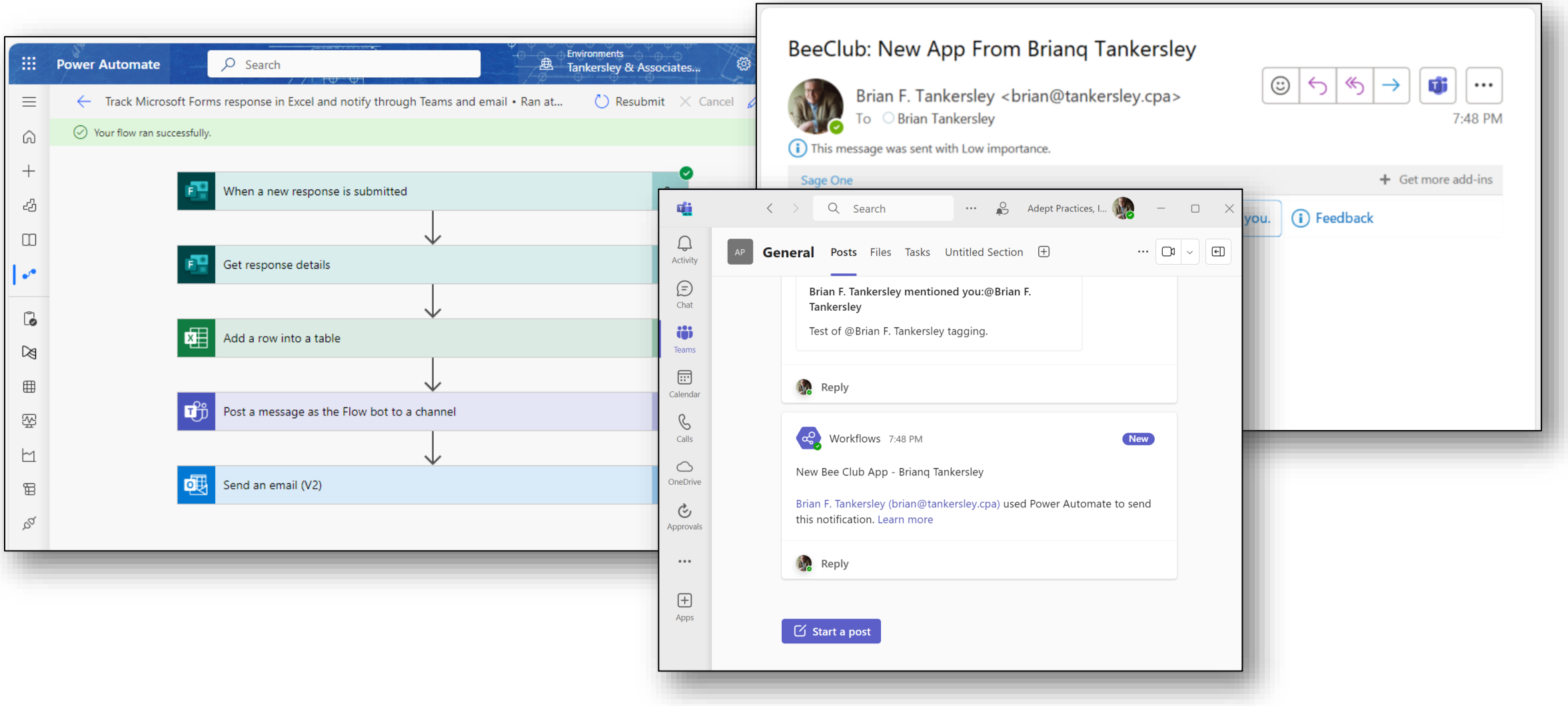
Power Automate - Results



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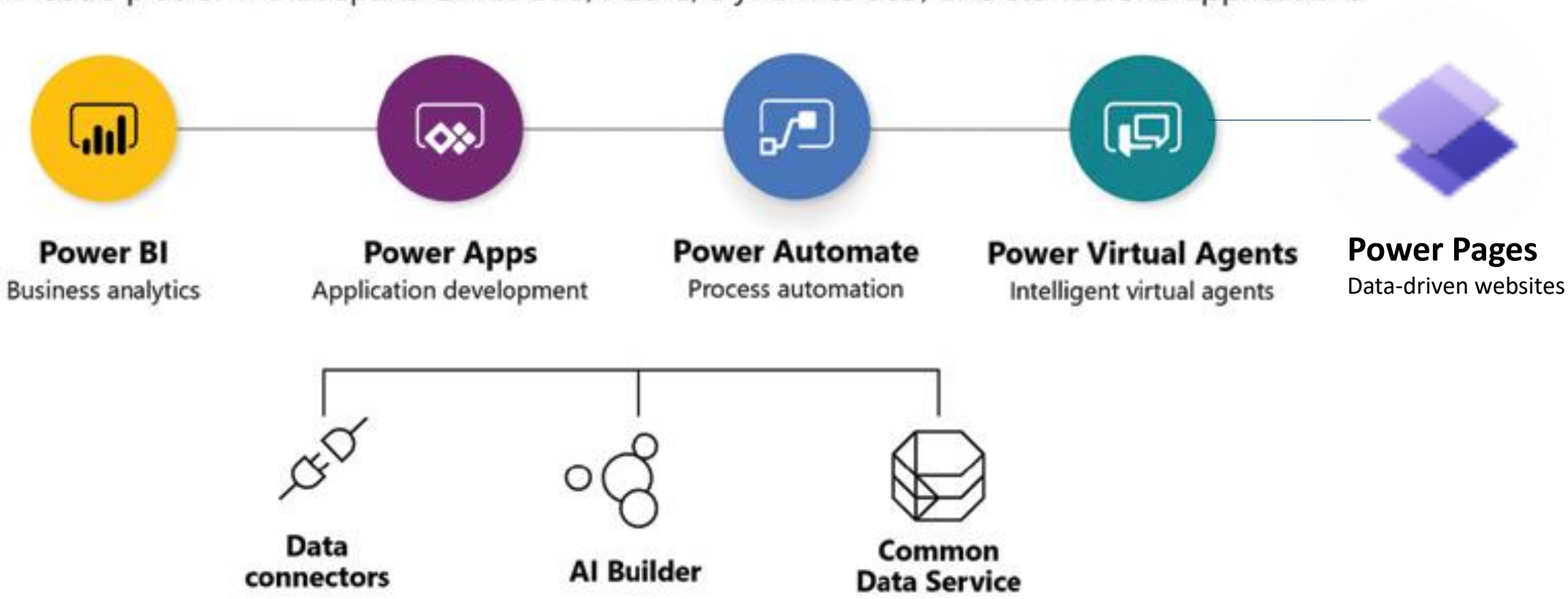
Microsoft’s Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



Source: Microsoft

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QUESTIONS?

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BONUS MATERIAL: COMMON DATA MODEL

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Common Data Model (CDM)

- A standardized data schema (layout) used to create business applications
- Embedded in Dynamics 365 applications, the Power Platform, as well as in Azure
- Facilitates cross-platform integrations by allowing data to be transformed to a single standard format (CDM)
- More info at https://github.com/Microsoft/CDM

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COMMON DATA MODEL SCHEMA

CORE

- Account
- Activity
- Contact
- Currency
- Email
- Goal
- Letter
- Note
- Owner
- Organization
- Position
- Task
- ...

Working with subject matter & industry experts, Common Data Model is expanding to include additional business entities and concepts

Dynamics 365

DYNAMICS 365

- Account
- Appointment
- Campaign
- Contact
- Lead
- Marketing List
- Phone Call
- Social Activity
- ...

SALES

- Competitor
- Discount
- Invoice
- Opportunity
- Order
- Order Product
- Quote
- ...

SERVICE

- Case
- Contract
- Entitlement
- Resource
- Service
- Scheduling Group
- Task
- ...

FINANCE

- Main accounts
- General Ledger
- Budget
- Bank
- Fixed assets
- Dimensions
- ...

SUPPLY CHAIN

- Product Information Management
- Procurement
- Trade Agreements
- Sales
- Production
- Warehouse and Transportation Management
- Asset Management
- ...

COMMERCE

- Channel
- Product catalog
- Prices & Discounts
- Sales transaction
- Payment instrument
- Customer loyalty
- Worker
- ...

MARKETING

- Account
- Contact
- Event
- Marketing Email
- Marketing Page
- ...

WEB

- Link Clicks
- Web Interactions
- Web Page
- ...

PROJECT OPERATIONS

- Project Planning
- Project Resourcing
- Project Time and Expense
- Project Invoicing
- Project Accounting
- ...

HUMAN RESOURCES

- Department
- Job Positions
- Worker
- ...

GLOBALIZATION

- Tax determination and calculation
- E-invoicing & real time reporting
- Payment formats
- Tax and audit reports
- Business documents
- Fiscal integrations for Retail
- ...

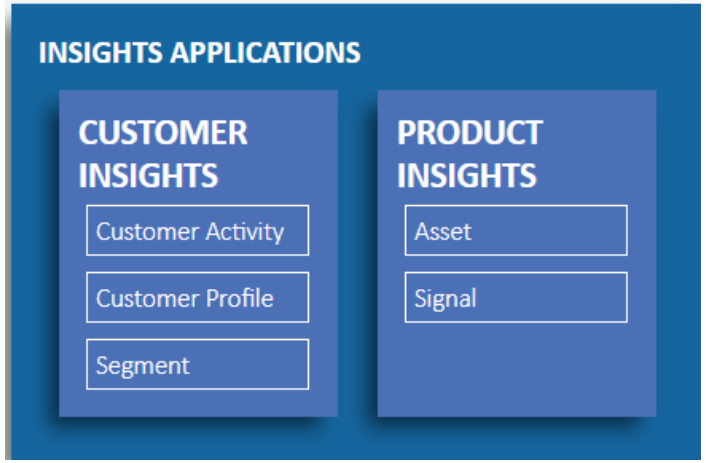
HEALTHCARE

- Patient
- Practitioner
- Device
- Care Plan
- Risk Assessment
- Medication
- Procedure
- Encounter
- Episode of Care
- ...

Account:
Business that represents a customer or potential customer.

Attributes:

- accountNumber
- accountRatingCode
- createdOn
- creditLimit
- openDeals
- openRevenue
- territoryid
- hotelGroup
- ...



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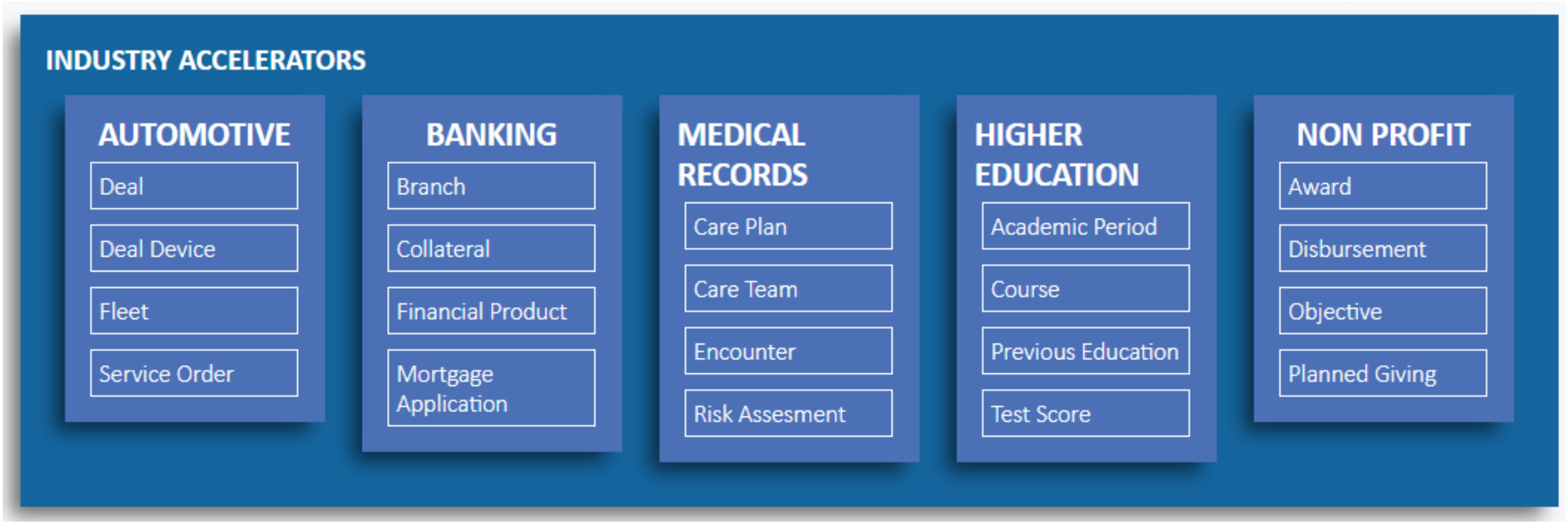
Industry Accelerator Models



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