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B&B TECHNOLOGIES

Power Stages

Date

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> **i**
>
> *Power Stages is a form approval solution for Dynamics 365.*
>
> *Power Stages allows users to convert custom entities into forms and adds flows through rules and conditions.*
>
> *You can quickly setup submit, reject and/or approve functions for certain team or user and create display, button or flow rules for defined stages.*

If you are looking turn key solution for your submission-based forms, just buy Power Stages and start using it immediately. No extra administration, operational, management, customization, development efforts require and no need to invest in any hardware.

Power Stages

Power Stages adds new layers top of your custom entities to implement submit, reject or approve features covering necessary scripts, workflows, business process flows generation.

You can send your custom entity to the next stage with defined validations or custom rules such as displaying fields in the form.

What we offer

We define

- Configuration part for custom entities
  You can configure your custom entities to be ready for form approval
- Condition
  You can set rules for selected team or user
- Rules
    - Stage Flow Rules
      configure steps to be used in custom entity, based on "Record Status" such as sending to next or sanding back to previous step.

    - Button Rules
      display Submit, Reject and/or Approve buttons in the form based on Team/User and Stage conditions

    - Display Rules
      define fields level appearance per Team/User and Stage Conditions like Mandatory, Visibility or Editability

A Sample Scenario for Dynamics 365 CE

> **i** *Assumption: Dynamics 365 Organization has Online Order custom entity with necessary fields and stages (Record Status) created.*

With the assumption, CRM Power User can create

1. Button Rule
   a. Displaying Submit button for Sales Team
   b. Displaying Submit and Reject buttons for Manager Team
2. Stage Flow Rule
   a. Order Creation (Sales Team)
   b. Manager Review
3. Display Rules
   a. Fields
      i. Order Date
         1. is Mandatory for Staff
         2. is Read Only for Manager
      ii. Gross Amount
         1. Is Optional for Staff
         2. Is Invisible for Manager
   b. Relation (1-N relation with Quality Process Custom Entity)
      i. must have 2 operations (items) for Quality Process Entity for Staff before Submit or Approve form
      ii. must have 3 operations (items) for Quality Process Entity for Manager before Submit or Approve form

so, Staff and Manager will have different view for the form once above are implemented.
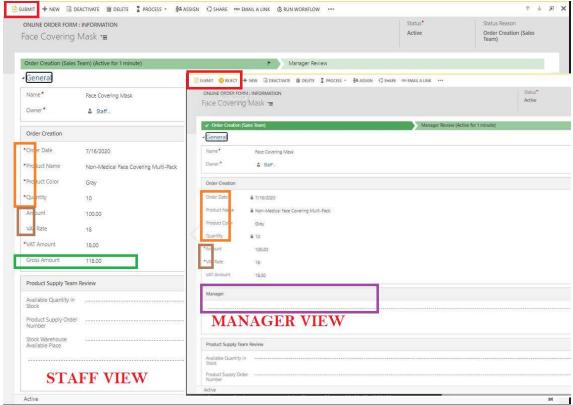
Screen Shots

Figure 1- Scenario Implementatio : Stage Flow Rule – Button Rule – Display Rule
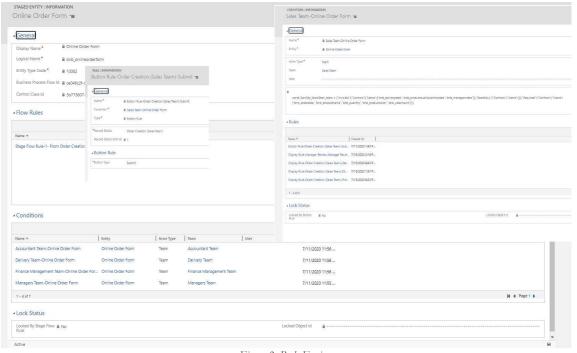

Figure 2- Rule Engines

About Us

B&B Information Technologies Services ltd. is technology oriented, dynamic and highly skilled company. We provide first class consultancy to the market with certified consultants.

We help our customer to use their valuable data in effective way while building up robust, optimized and strong database layer even under catastrophic situation.

We monitor overall system performance and investigate bottleneck then identify root cause of degradation if needs.

Supporting our customers to realize their business needs through world standard methodologies: Agile, Waterfall and SureStep

Managing, planning, scheduling and controlling your deliveries and building up deployment strategy through different stages and environments; including testing and releases are ours expertise area.

Automate repetitive tasks in a formalized testing process takes already in place, Generate test scenarios and automate them to keep system robust in case of any updates, deployments and releases.

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