



Using Power Automate to Provide More Power to Power BI

August 26, 2026

U.S. Presence

Leading U.S. Firm

\$2.24B

Revenue (FY 2025)¹

77

Markets

31

States

600+

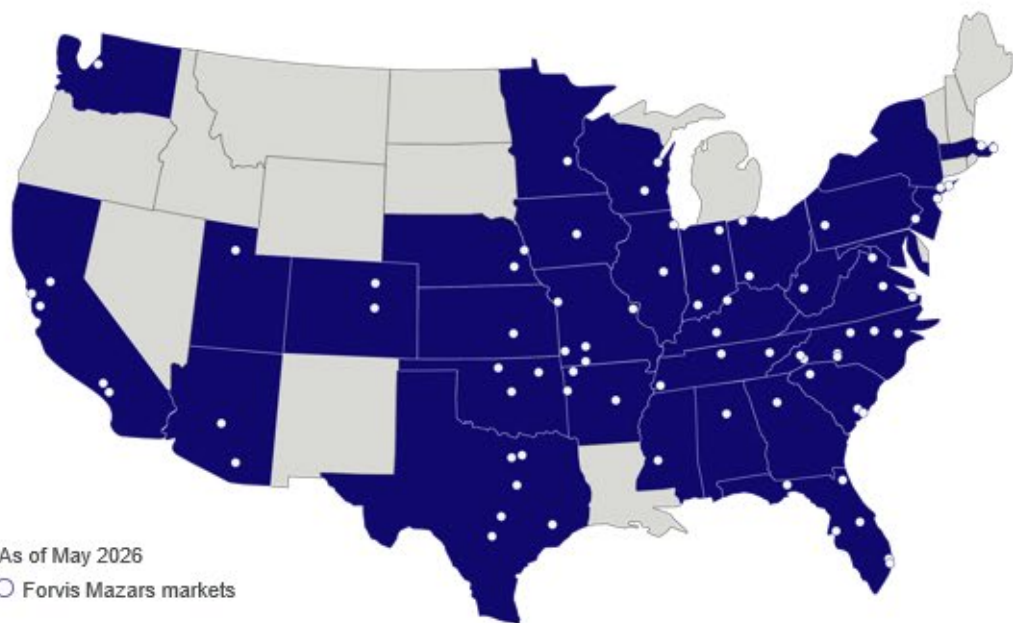
Partners & Principals

7,000+

Employees

84 Net Promoter
Score^{® 2}

("World-Class" Ranking)



Alabama
Birmingham

Arizona
Phoenix
Tucson

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Francisco
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston
Brewster

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Philadelphia-
Metro Area
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond

Washington D.C.
Metro Area

Washington
Seattle

West Virginia
Charleston

Wisconsin
Appleton
Madison

Business Technology Services

We solve for business challenges & support innovation through technology solutions.

Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end technology solutions and managed services help clients achieve their digital transformation goals. Services include:

- | | |
|---|--|
|  Solution Assessment and Selection |  Implementation Project Rescues |
|  System Implementation and Integration |  Business Intelligence (BI) and Analytics |
|  Process and Technology Design |  Robotic Process Automation (RPA) |
|  Upgrades, Enhancements, and Automation |  Custom Application Development |
|  Training, Monitoring, and Support |  IT and Cybersecurity Managed Services |



Business Technology Services

For Middle Market & Global Organizations



System Integration

ERP, intelligence, automation, and CRM solutions designed to connect core operations.

ERP

- Microsoft Dynamics 365 Finance, SCM, Project Operations, Commerce, Business Central (GP, NAV, AX)
- Oracle NetSuite
- Sage Intacct, Sage 100, Sage 500, Sage Fixed Assets
- Trimble Construction One, Viewpoint, Spectrum, Vista

Intelligence & Automation

- Microsoft Copilot Studio
- Microsoft Power Platform
- Microsoft Azure
- Workato
- Artificial Intelligence (AI)
- Robotic Process Automation (RPA)
- Custom Application Development
- Business Intelligence (BI)
- Solver Extended Financial Planning & Analysis (xFP&A)

CRM

- Microsoft Dynamics 365 CRM: Sales, Customer Insights, Customer Service, Field Service
- Marketing Automation



Managed Services

Ongoing support, security, operations, and application management that help sustain results.

Cybersecurity

- 24/7/365 Security Operations Center (SOC)
- Managed Detection & Response (MDR)
- Managed SIEM
- Vulnerability Management
- Managed Brand Protection
- Managed Incident Response
- Virtual CISO (vCISO) Advisory
- Partnerships with SentinelOne, Elastic, Qualys, and more

IT Operations

- Virtual Chief Information Officer (CIO)
- Network Operations Center (NOC)
- Cloud Infrastructure (Azure & AWS)
- Managed Server and Desktop
- Managed Backup and Recovery
- Procurement

Business Applications

- Microsoft Dynamics ERP & CRM
- Microsoft Power Platform
- Microsoft 365
- Oracle NetSuite
- Sage and Sage Intacct
- ISV Add-On Management
- Release and Upgrades Management
- Automated Testing Setup & Support
- End-User Training

Today's Presenter



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Senior Managing Consultant

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Automation does not need to be
our enemy. I think machines can
make life easier for men, if men do
not let the machines dominate
them.

— *John F. Kennedy* —

AZ QUOTES

Objectives

1. Discuss how using Power Automate can help eliminate manual steps in data refreshes, report distribution, and workflow triggers.
2. Identify how to configure automated notifications and workflows that respond to changes in your Power BI data.
3. Describe how to integrate Power BI with other business applications to help create seamless, automated data-driven processes.



Agenda

1

What is Power Automate

2

How Power Automate Works with Power BI

3

Examples



Using Power Automate to Provide More Power to Power BI

Executive Summary

The Challenge:

Provide companies with options for automating data into Power BI or out of Power BI

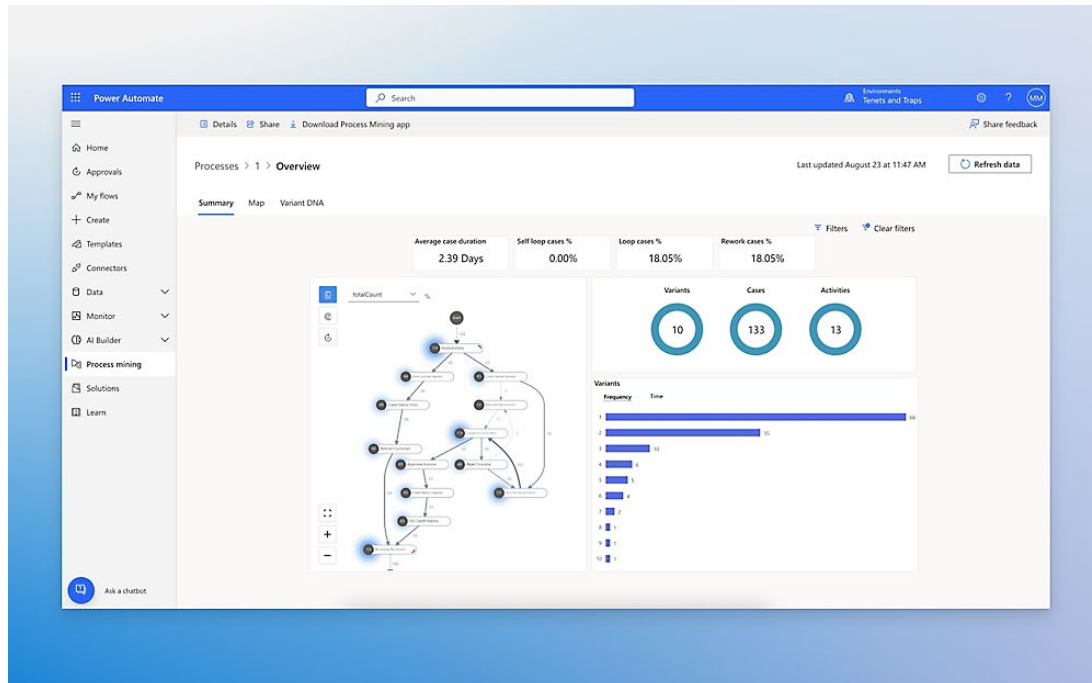
Less manual data movement, fresher reports, and fewer handoffs between teams



SECTION 01

What is Power Automate

Automating business processes across your everyday tools



01

A set of functionality to enable organizations to automate business processes

Like what?

What is Power Automate

Common Use Cases



HR Onboarding

Provision accounts, assign training, and route new-hire paperwork automatically



Purchase Invoice Approvals

Route invoices to the right approver and capture sign-off with a full audit trail



Email/Teams Notifications

Alert the right people the moment something needs their attention



Data Syncing

Keep records aligned across systems without manual re-keying

What is Power Automate

What's Included

	AI	AI Builder and Copilot add document processing, prediction, and natural-language authoring to your flows
	Desktop Flows (RPA)	Automate legacy and UI-only applications with attended or unattended robots
	Cloud Flows (DPA)	Connect services with trigger-based, event-driven workflows across a broad connector library
	Task and Process Mining	Discover where time is lost and which processes are worth automating first
	Orchestration	Centrally schedule, queue, and monitor bots and flows across the estate

What is Power Automate

Some Real-World Examples



Real World Examples

Other Industries



Manual Data Entry Became Too Much

The Situation

Specialty food distributor outsourced data entry of sales orders.

The Solution

Built a solution using Robotic Process Automation (RPA) to enter in more than 3,000 order lines per day into their ERP system which is based on an AS/400 (Green Screen).

The Benefits

Since introducing the use of RPA, the company has been able to efficiently input orders with increased speed and higher data quality while **reducing costs by more than \$200k per year**.



Systems Lacked Modern Integrations

The Situation

Healthcare company leveraged an Electronic Medical Records (EMR) that lacked the ability to automate the export of GL data and import into their Enterprise Resource Planning (ERP) system. The system required an individual to make at least 7 clicks per location.

The Solution

Used RPA to mimic the export of GL data from the EMR system, transformed the data and prepped for ingestion into the ERP.

The Benefits

The use of RPA automates the process of clicking more **than 700 times (100 different locations)** and automates the integration allowing employees to focus on high value tasks.

Real World Examples

Other Industries



Vertical Sales Opportunities Passed them By

The Situation

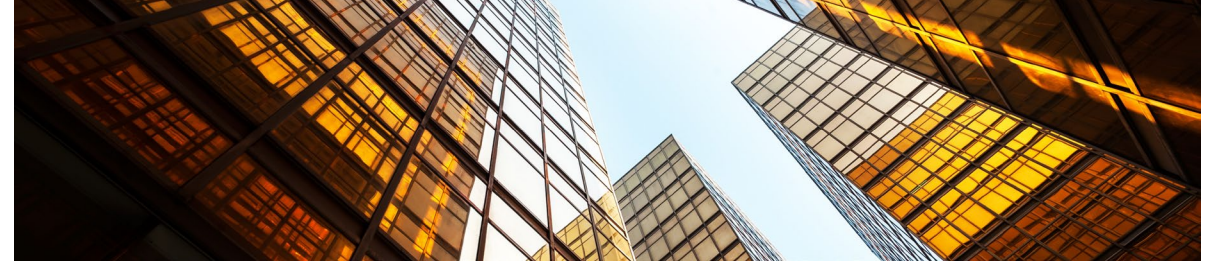
The team manually creates over 180 item match files for Sales, a process that is highly time-consuming and involves pulling data from multiple systems and takes upwards of one week to analyze.

The Solution

Implemented an RPA solution that combined data from multiple systems and ran analysis to determine which items should be sold into stores.

The Benefits

The team was able to **identify more than \$120m** in vertical sales opportunities. This solution reduced the time from a week down to hours to perform the analysis and **resulted in \$5m in new revenue in the first three months**.



Bank Reconciliation Is Too Time Consuming

The Situation

A local city government utilized a very manual process to perform its bank reconciliation on a daily basis. This process took an extensive amount of time, and they were looking at a way to automation.

The Solution

Utilizing RPA, a solution was built to extract GL data from a web-based ERP system and combine data from the bank transaction file to allow the department to manage exceptions vs. reviewing each transaction.

The Benefits

The implementation of the RPA solution is saving the team **more than 260 hours per year** to focus on higher value tasks where they are already stretched thin due to limited staff.

What is Power Automate Pricing

TRIAL	PREMIUM	PROCESS
Free 30 days, full access • Full Premium feature set • No credit card required • Ideal for pilots and proofs of concept	\$15 per user / month • Unlimited cloud and desktop flows • Premium and custom connectors • Attended RPA, licensed per user	\$150 per bot / month • Licensed per process, not per user • Unattended RPA at scale • Best for high-volume automation

SECTION 02

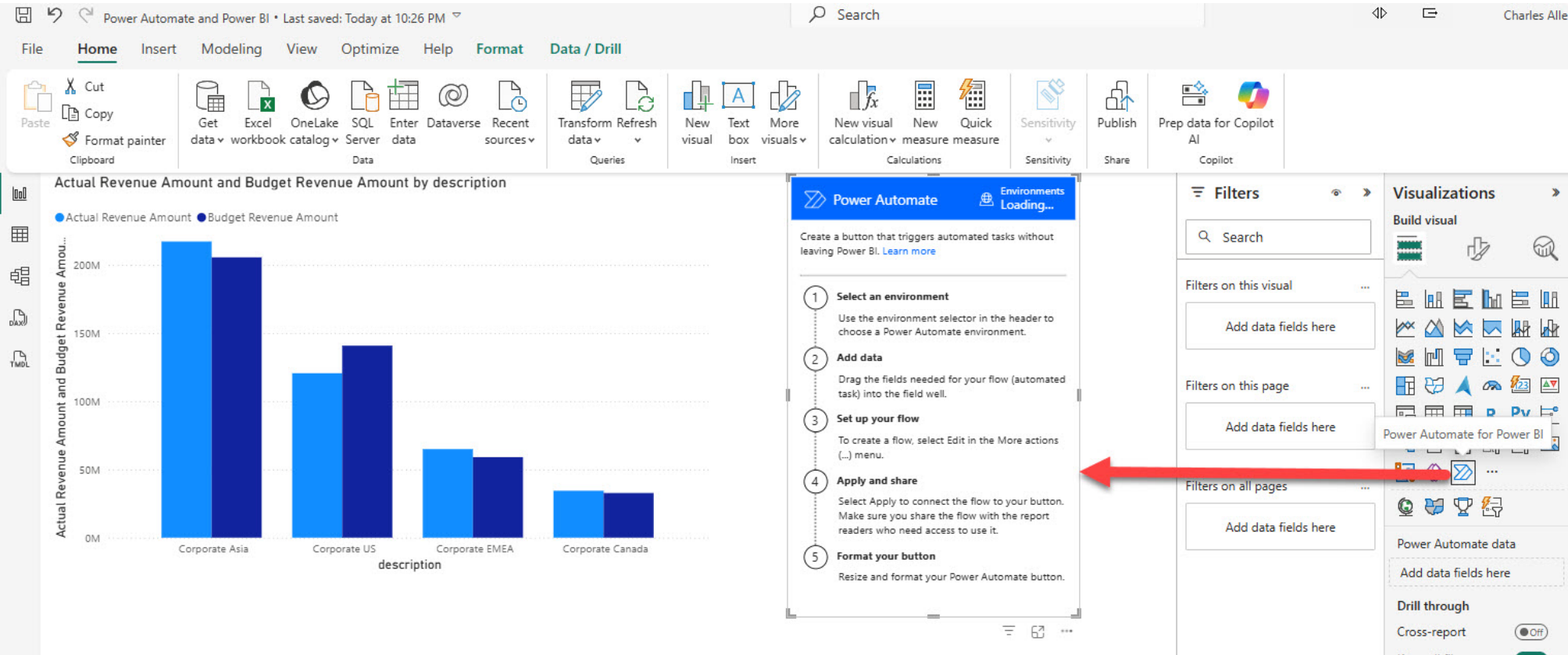
How Power Automate Works with Power BI

Connecting flows to your reports and data

02

How Power Automate Works with Power BI

Illustration of the Power Automate Visualization



How Power Automate Works with Power BI

Steps to Setting Up a Visual

1

Drag the visual to the report

Add the Power Automate visual to your Power BI report canvas

2

Edit the visual

Open the visual in edit mode and choose the data fields to pass through

3

Create a Power Automate flow

Build the flow that runs when the button is triggered

4

Test the Flow

Run the flow from the editor to confirm it behaves as expected

5

Apply the Flow to the Button

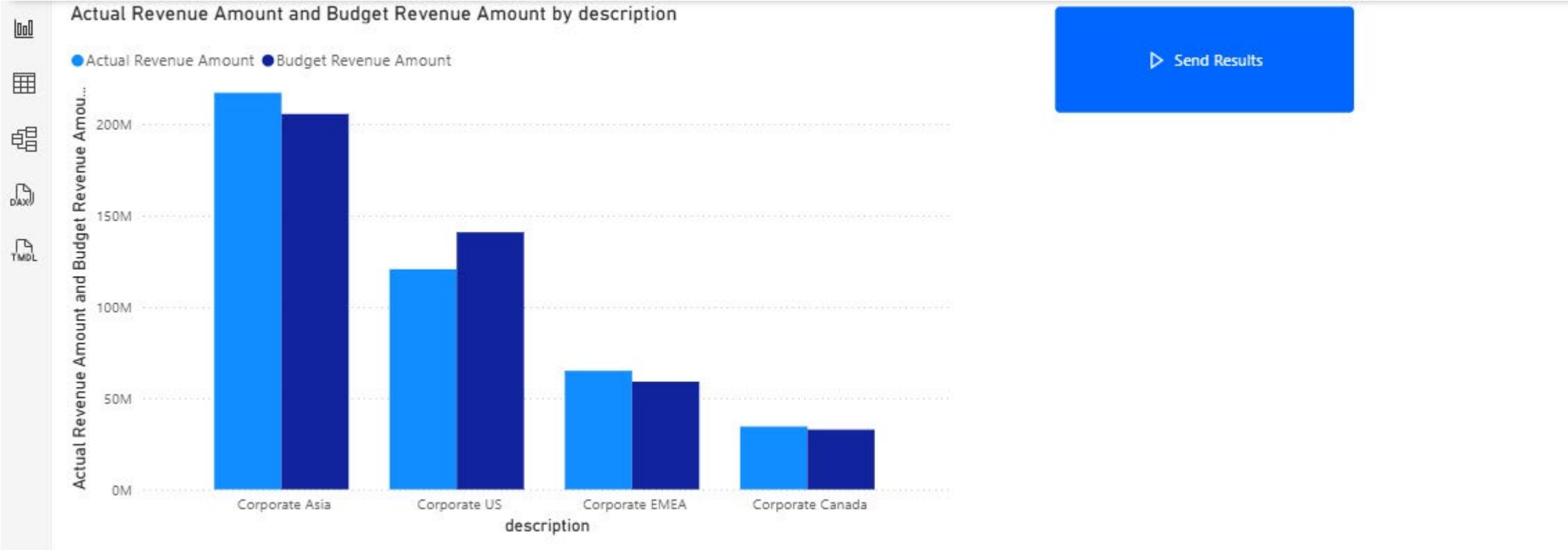
Connect the saved flow to the visual so the button invokes it

6

Update the button

Set the label, styling, and instructions users will see

How to Use Power Automate with Power BI



LIVE WALKTHROUGH

Demo



SECTION 03

Examples of Power Automate Flows

A closer look at flows in action

03

Pushing Data into Power BI

Available Templates

Microsoft Power Automate



Update an Excel table from Power BI

By Microsoft

Instant178642



Send a Teams message from Power BI

By Microsoft

Instant68281



Trigger a Power BI button with a custom action

By Microsoft

Instant54995



Create an item for a SharePoint list from Power BI

By Microsoft

Instant42299



Send an e-mail to any audience from Power BI

By Microsoft

Instant38091



Create a task from Power BI

By Microsoft

Instant4846

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You are not limited to the standard templates

Start from a template

Hundreds of prebuilt flows for common tasks across Microsoft 365 and beyond

Customize any step

Change triggers, conditions, and actions so a template fits your process

Build from scratch

Start with a blank flow and connect whatever systems your team relies on

Create any flow

LIVE WALKTHROUGH

Demo



Q&A



Business
Technology
Services

Questions?

Contact

Forvis Mazars



Charles Allen

Senior Managing Consultant

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