Power Automate

Turning Outdated Into Automated

October 2025

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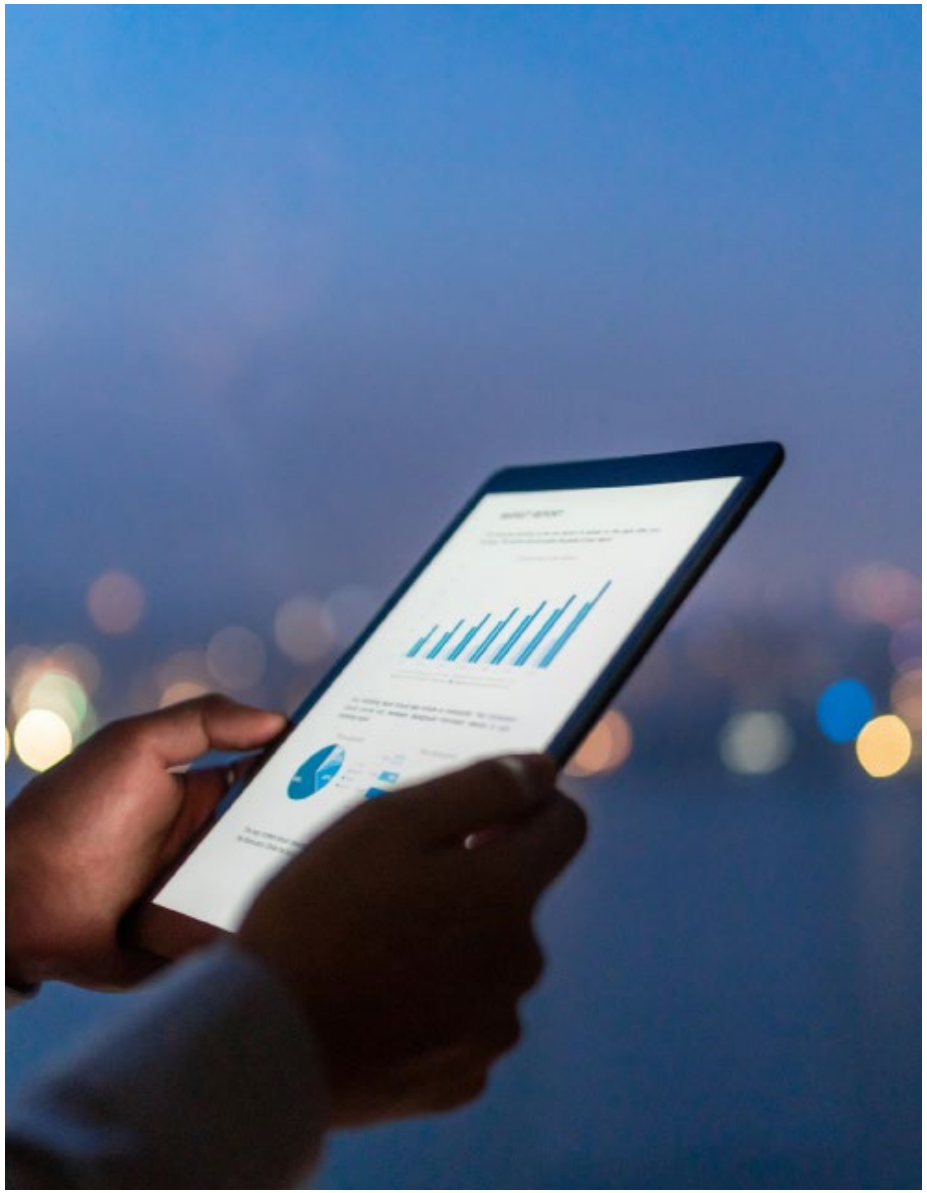
Business Technology Services

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 & managed service solutions help clients achieve their digital transformation goals. Services include:

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



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Premier Technology Partnerships

ERP
Microsoft Dynamics 365
NetSuite
Sage Intacct
Trimble Construction One

CRM
Microsoft Dynamics 365
Marketing Automation

INTELLIGENCE & AUTOMATION
Microsoft Power Platform
Microsoft Copilot Studio
Workato
Robotic Process Automation (RPA)

APPLICATION DEVELOPMENT
Custom App Development

MANAGED SERVICES
Proactive Support Services for Business Applications, IT, & Cybersecurity

Microsoft Partner

ORACLE NetSuite

Sage Partner

Trimble Construction One™

ADP

workato

solver

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Today’s Presenter

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Senior Managing Consultant

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Objectives

1. Identify opportunities to streamline reporting workflows
2. Apply automation strategies to help reduce manual data handling & improve reporting efficiency
3. Discuss how integrated reporting tools can enhance data accuracy & support timely decision making

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Agenda

1. Power Automate Introduction
2. Power Automate & Power BI
3. Power Automate & Solver

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01

Power Automate Introduction

Power Automate Introduction

What Is Power Automate?

Low-code & AI-driven service for automating business processes

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INTELLIGENCE & AUTOMATION

HYPERAUTOMATION

Assess current set of technologies & provide an actionable roadmap of opportunities for near-term & long-term initiatives. Execute Alpha/Beta POCs

SYSTEM TO SYSTEM INTEGRATION

Utilize Microsoft's Power Platform &/or Azure Services to integrate data between disparate systems, *e.g.*, HRIS, ERP, CRM, QC, WMS, Electronic Medical Records (EMR), etc.

LOW-CODE TRANSFORMATION

Utilize Microsoft's Power Platform to deliver solutions to meet the changing needs of organizations to meet digital demands of the workforce in a timely manner

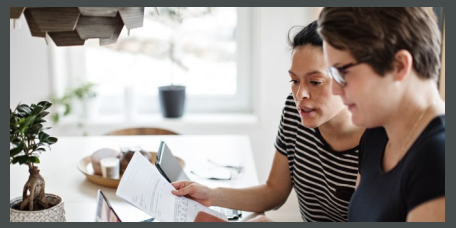
AI & ROBOTIC PROCESS AUTOMATION

Use AI & RPA tools to automate repetitive tasks, enhancing efficiency & enabling humans to focus on value-added activities

Thought Leadership

REASONS TO CONSIDER BUSINESS PROCESS AUTOMATION

Learn about potential benefits for your organization by automating business processes.



PUTTING AI AGENTS TO WORK FOR HUMANS

Explore the functionalities and effects of AI agents in various applications and industries.

COPILOT IN MICROSOFT POWER APPS

Learn how AI technology is transforming how we work to help boost efficiency and productivity.

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Define
What Is Hyperautomation?

According to Gartner …

Hyperautomation is a business-driven, disciplined approach that organizations use to **rapidly identify, vet, & automate as many business & IT processes** as possible.

Hyperautomation involves the orchestrated use of multiple technologies, tools, or platforms, including artificial intelligence (AI), machine learning, event-driven software architecture, robotic process automation (RPA), business process management (BPM), intelligent business process management suites (iBPMS), integration platform as a service (iPaaS), low-code/no-code tools, packaged software, & other types of decision, process, & task automation tools.

Definition of Hyperautomation - Gartner Information Technology Glossary

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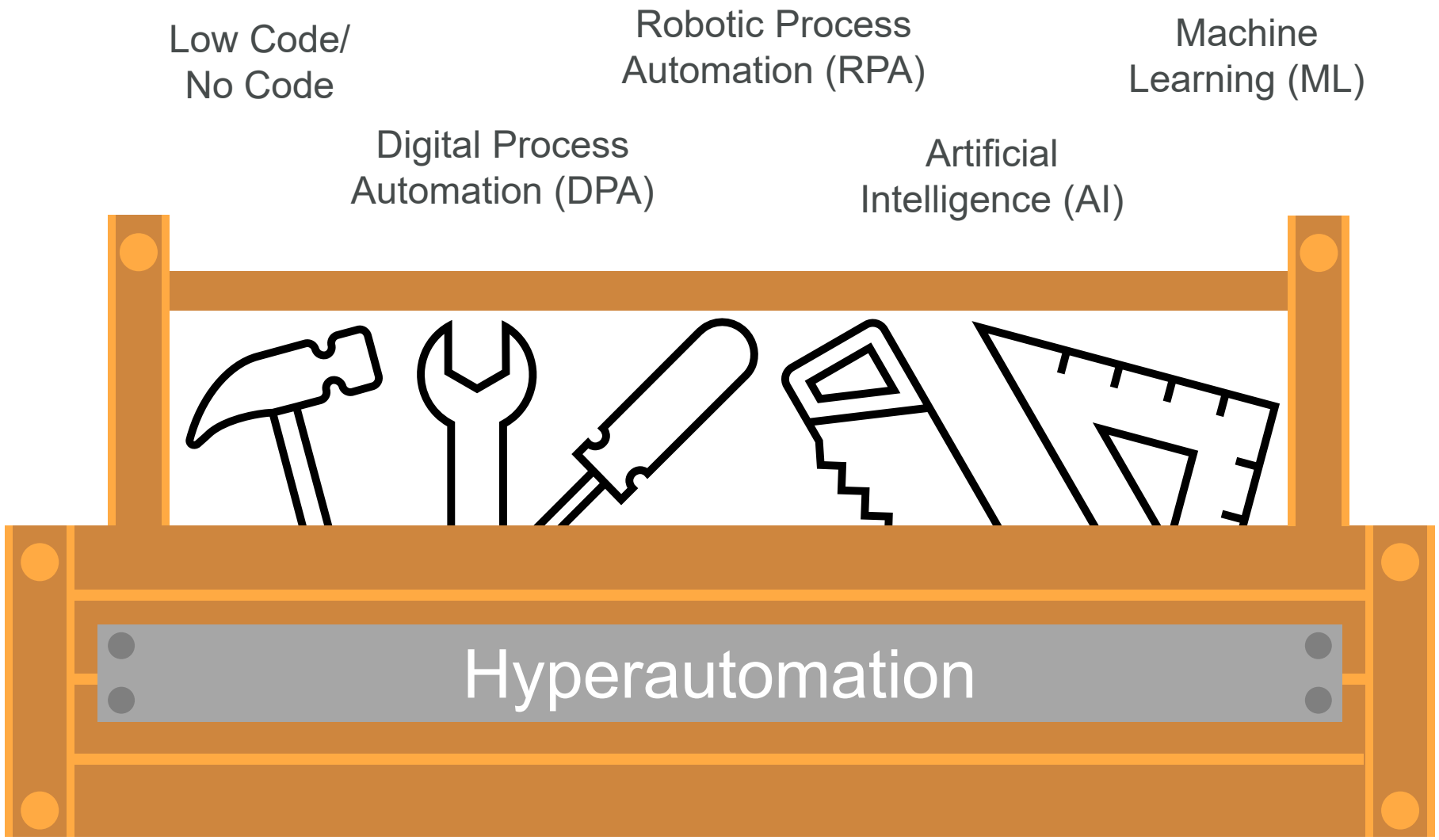
You Have a Toolbox

Use the Right Tool for the Job



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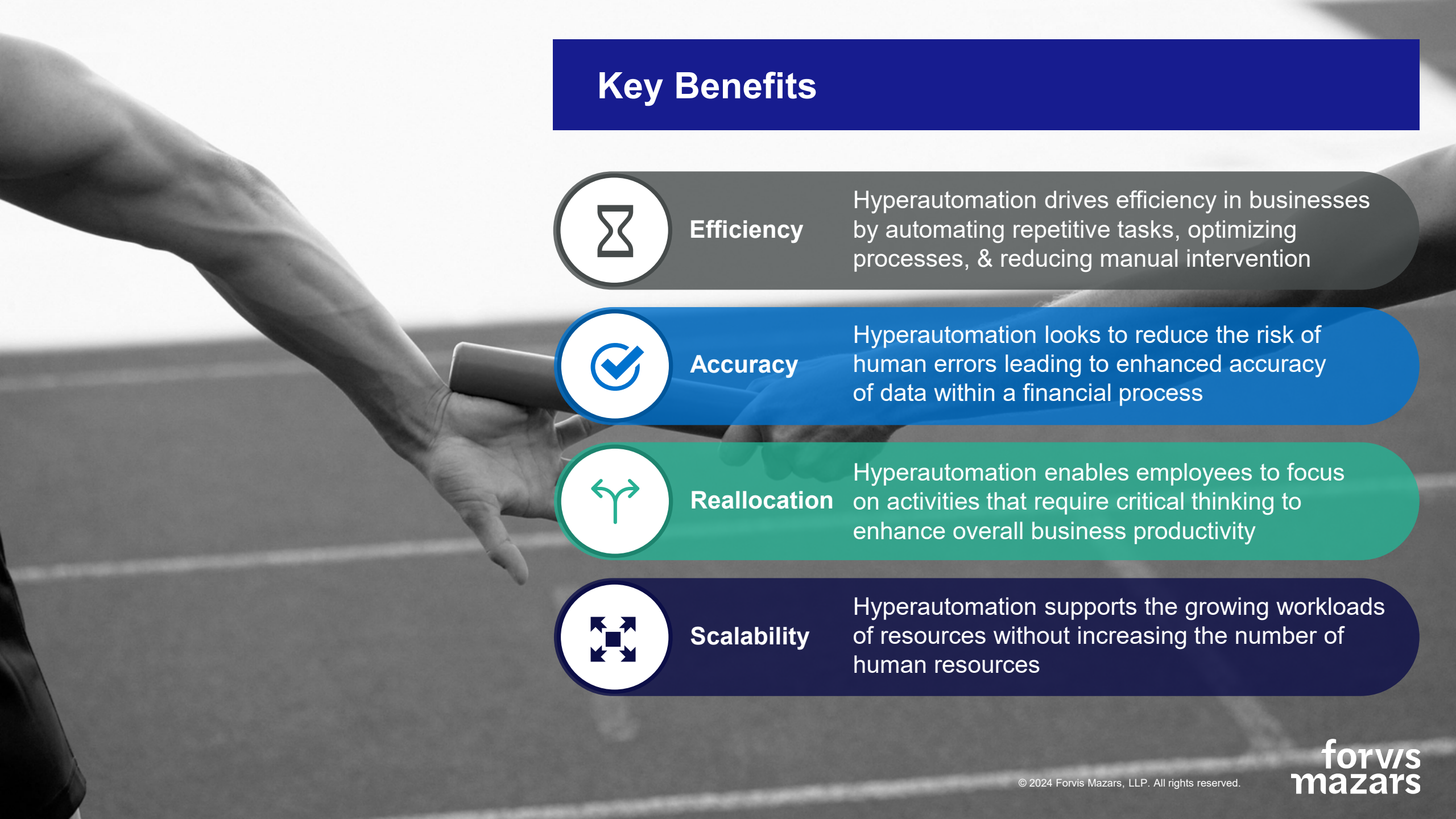
Key Benefits



Efficiency

Hyperautomation drives efficiency in businesses by automating repetitive tasks, optimizing processes, & reducing manual intervention

Accuracy

Hyperautomation looks to reduce the risk of human errors leading to enhanced accuracy of data within a financial process

Reallocation

Hyperautomation enables employees to focus on activities that require critical thinking to enhance overall business productivity

Scalability

Hyperautomation supports the growing workloads of resources without increasing the number of human resources

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Tailwinds
Efficiency Gains

Automate high-volume tasks that yield low-value results.

Improve Productivity

520 hrs

On avg. spent annually on tasks that can be automated

60%

Of all occupations have about 30% of activities that can be automated

To Improve Performance

27%

Reduction in errors on avg. when tasks are automated

248%

Return on investment over three years

How Automation Drives Business Growth and Efficiency (hbr.org).
Source: The Total Economic Impact® of Microsoft Power Automate – July 2024.
A Future That Works: Automation, Employment, and Productivity – McKinsey .

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Use Cases
Actual Projects & Considerations

Use Cases	
Bank Reconciliation Using RPA	Tax Confirmation Extraction & Validation
Employee Review Process & Signature	Personal Property Tax Extraction From PDF
System Integration to Sage Intacct	SFTP to SharePoint Digital Filing
RPA for Data Collection/Entry From Disparate Systems	Sustainability Integration With Workiva
Mobile Application for Data Capture & Approval	IRS 941 PDF Extraction
Automated Extraction From PDF to System	1099 & Bank Statement Extraction
Automated Signature Capture, *e.g.*, Adobe Sign, DocuSign	Employee Compensation Secure Send & Signature
Email Monitoring & Digital Filing	Automated IT Operations/Onboarding
Processing W-2 Corrections	Invoice Details Extractions for AP Automation

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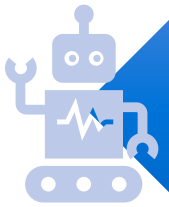
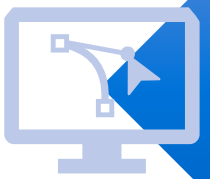
Power Automate Introduction

Pricing

Free Trial – Use for up to 30 days



Power Automate Premium – $15/user/month



Power Automate Process – $150/bot/month

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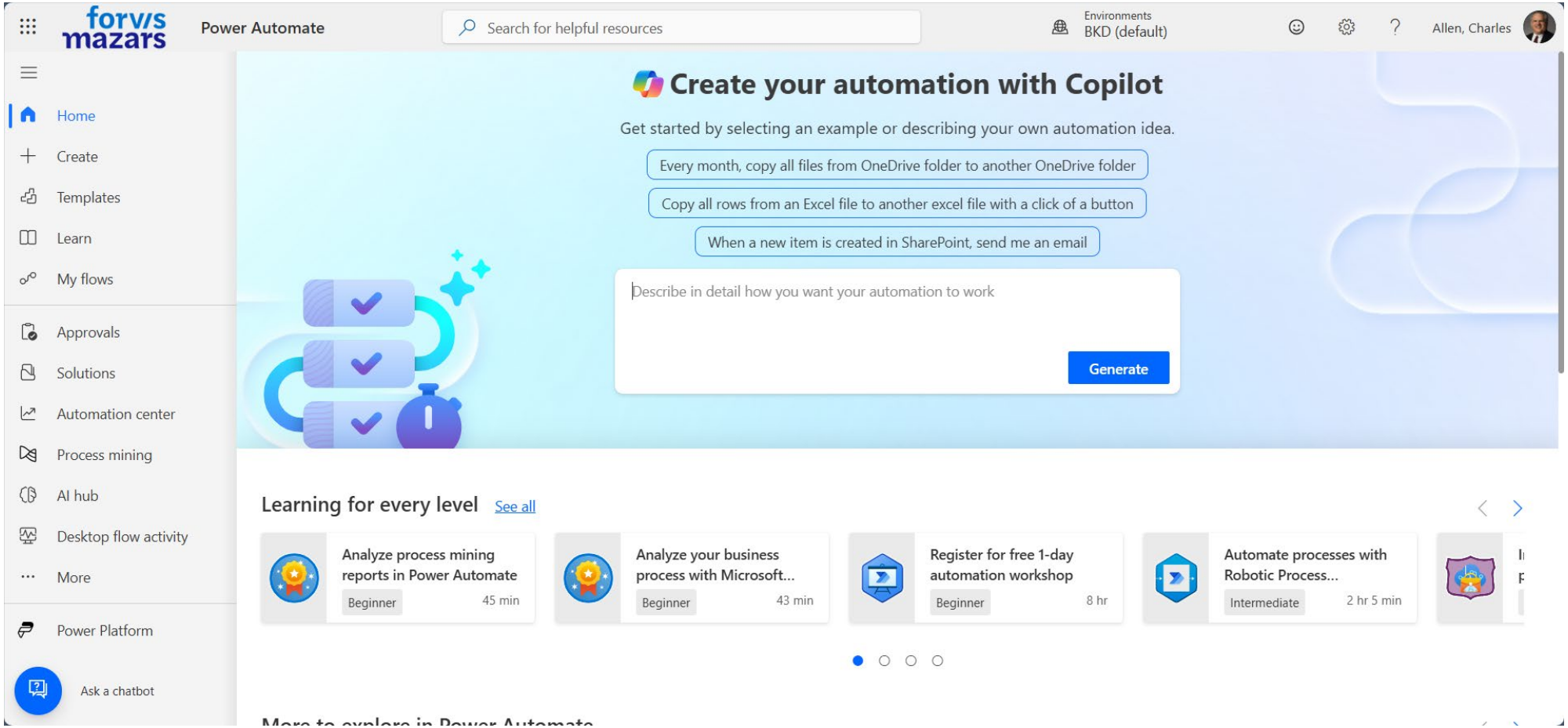
Power Automate Introduction
Getting Started



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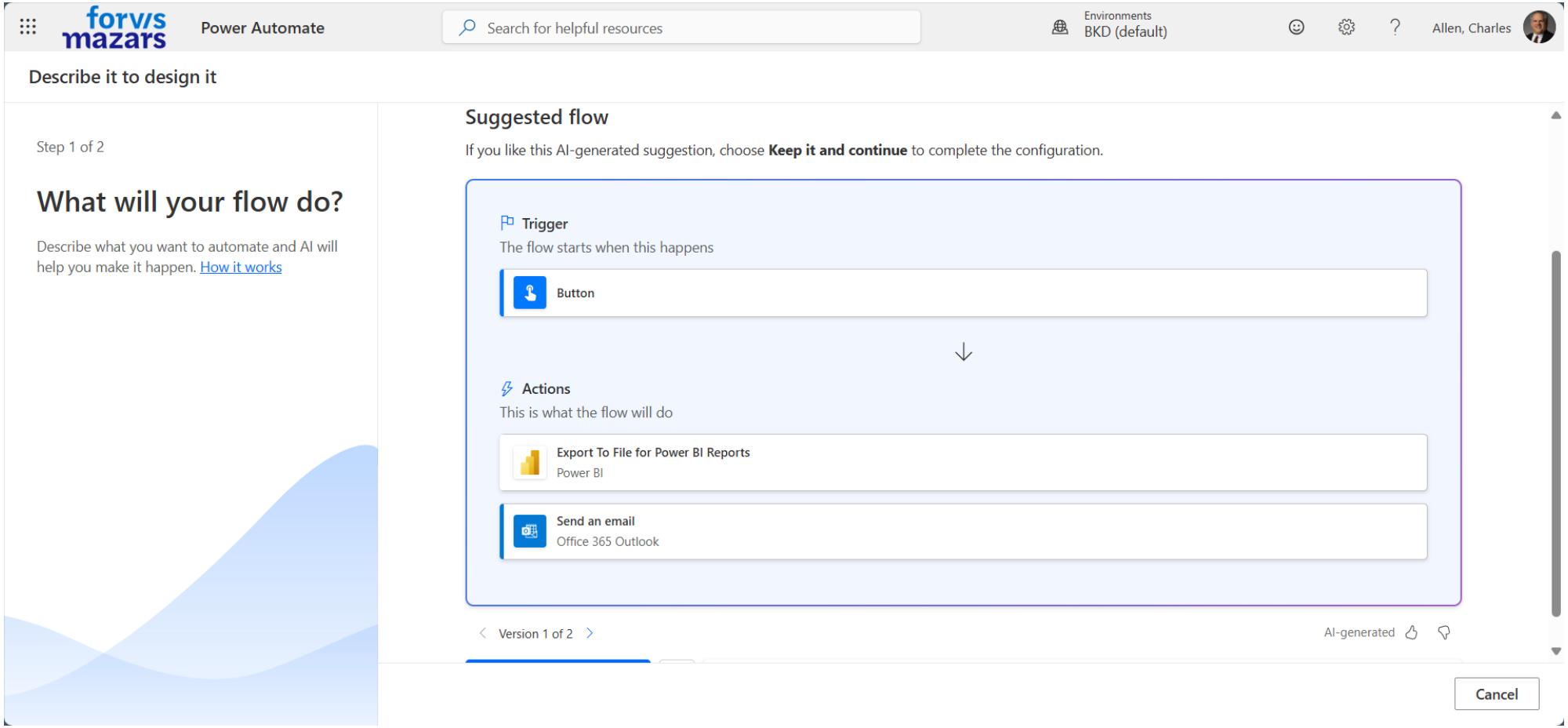
Power Automate Introduction
Getting Started



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02

Power Automate & Power BI

Automate putting intelligence in your users’ hands

Power Automate Options for Power BI

What can Power Automate do for Power BI?

Send an email message

Update an Excel table

& more!

Start a refresh

Create an item for a SharePoint list

Create a task

Send a Teams message

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Power Automate Options for Power BI

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Setting the Stage

Sharing Report Results

- Power BI Report Shows Sales Results by Salesperson
- Each Salesperson Needs Results Shared

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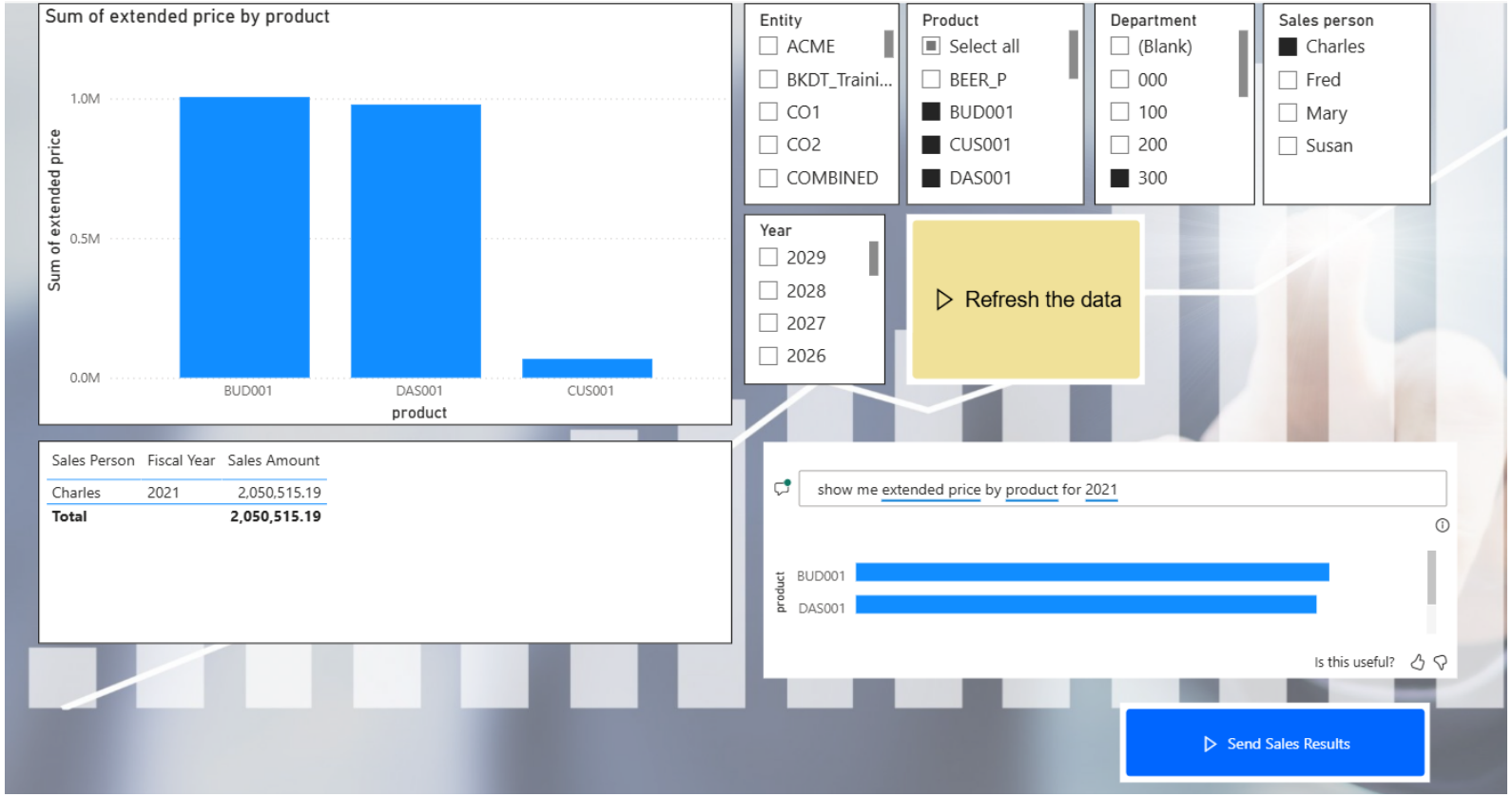
Power Automate & Power BI

Refreshing Data & Sending Sales Results



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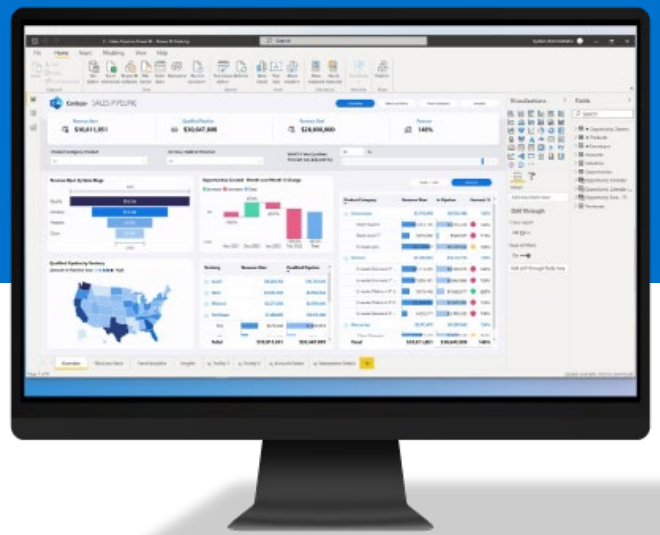
Demo

Microsoft Partner

solver



03

Power Automate & Solver Suite

Pull out data for processing & inclusion in other systems

What Is Solver?

A suite of extended financial planning & analysis tools

- xFP&A solution
- Cloud-based
- Reporting, planning, data warehouse
- Integration with Power BI & Tableau

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Solver Data API

A powerful tool for data integration & management

- Method to enable data to be pulled from the Solver data warehouse
- Use cases:
  - Add to a separate data warehouse
  - Export data to Excel
  - Send to a personal Azure data factory
  - Send to another system
  - & more

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Setting the Stage

How to streamline financial reporting & overhead allocations

- Solver is used for financial reporting
- Allocations of overhead expenses are created from actuals
- Allocation entries are needed in accounting software

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Setting the Stage

How to streamline financial reporting & overhead allocations (cont'd)

- Actual rent dollars are imported from the accounting software
- Rent expense will be allocated to departments based on square footage
- An Input Form will be used to calculate the amounts
- That data will be pushed into the accounting software using Power Automate

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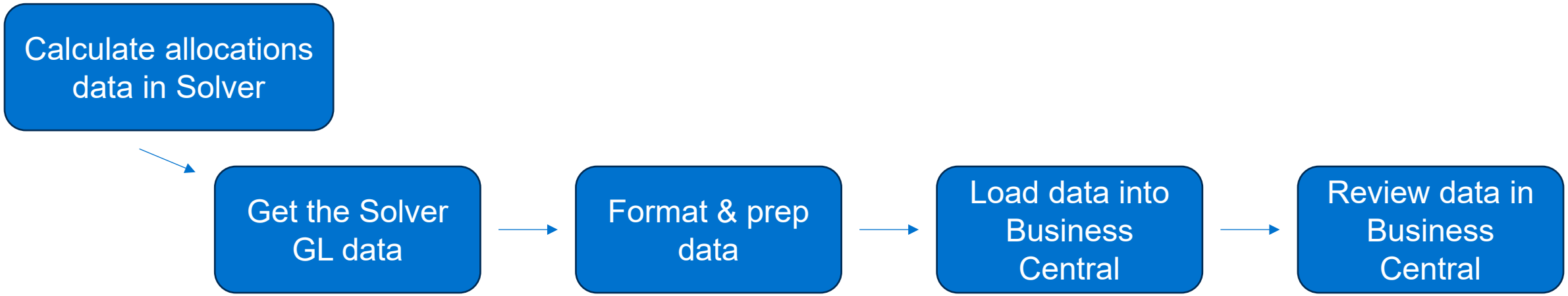
Setup in Solver
How It's Used

Example flow of data



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Demo

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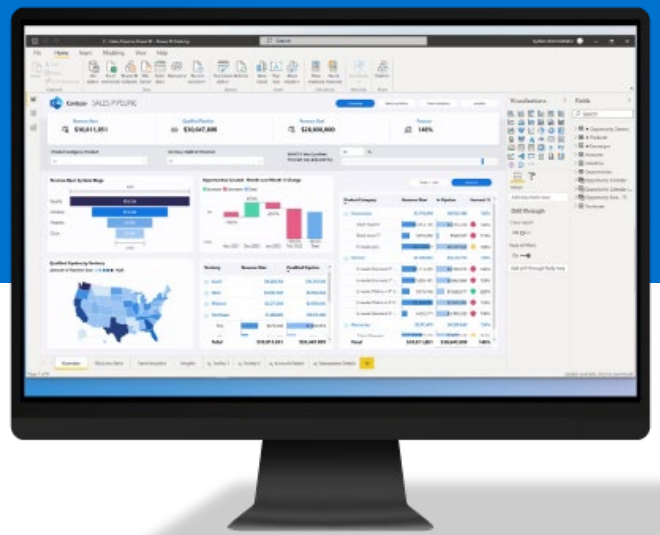
solver



Q&A

Business Technology Services

Questions?

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