



From Canvas to Flow (Expense Tracker)

Power Platform Community Sweden
MALMÖ
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Agenda

- 01 Speaker Introduction
- 02 Problem Statement
- 03 Proposed Solution
- 04 Architectural Overview
- 05 Components Used
- 07 Key Functionalities
- 08 Development Tips & Tricks
- 09 Q&As

Speakers



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MS Cloud Software Engineer
Microsoft Power Platform Solution Architect
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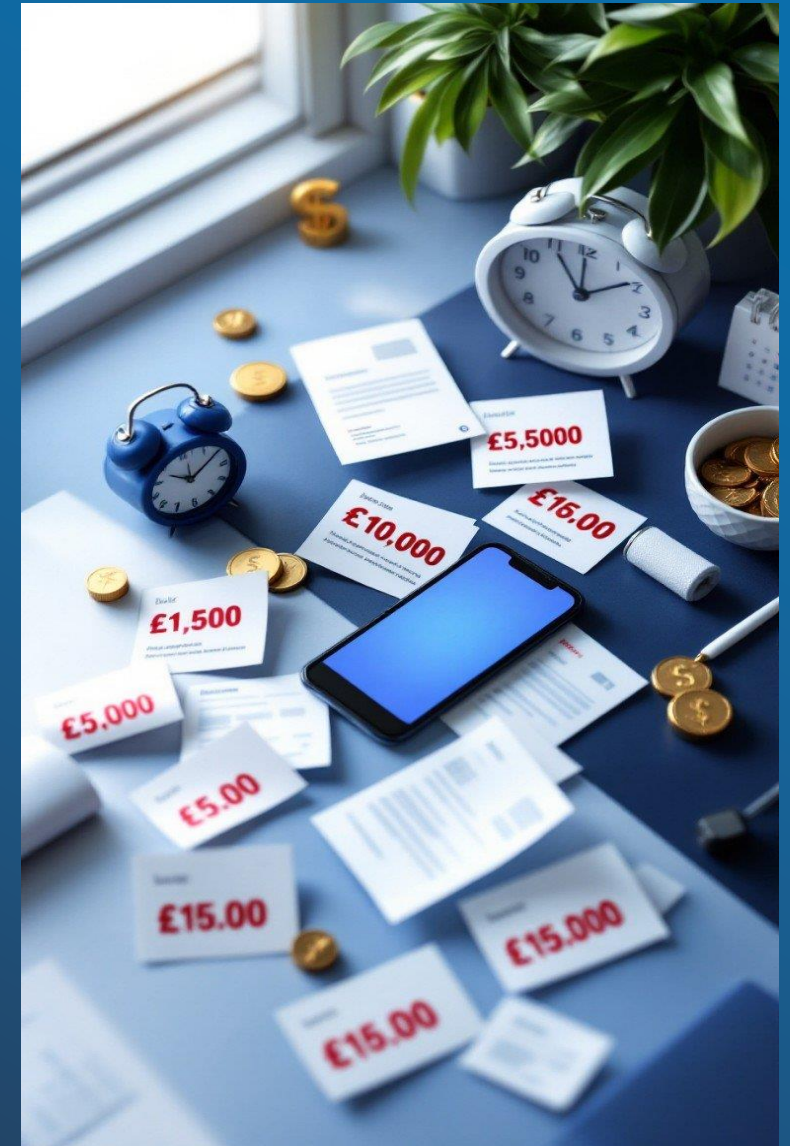
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Senior MS Cloud Software Engineer
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The Challenge: Inefficient Expense Management

- **Manual & Paper-Based Processes:** Reliance on physical receipts, spreadsheets, and email chains for submitting expenses.
- **Lack of Real-Time Visibility:** Employees and managers cannot easily track the status of submitted expenses.
- **Complex Approval Workflows:** Difficulty in routing expenses based on category or amount.
- **Data Disorganization:** Expense data is scattered, making it difficult to report on budgets and spending trends.
- **Slow Reimbursement Cycles:** Cumbersome processes lead to delays in employee repayments.

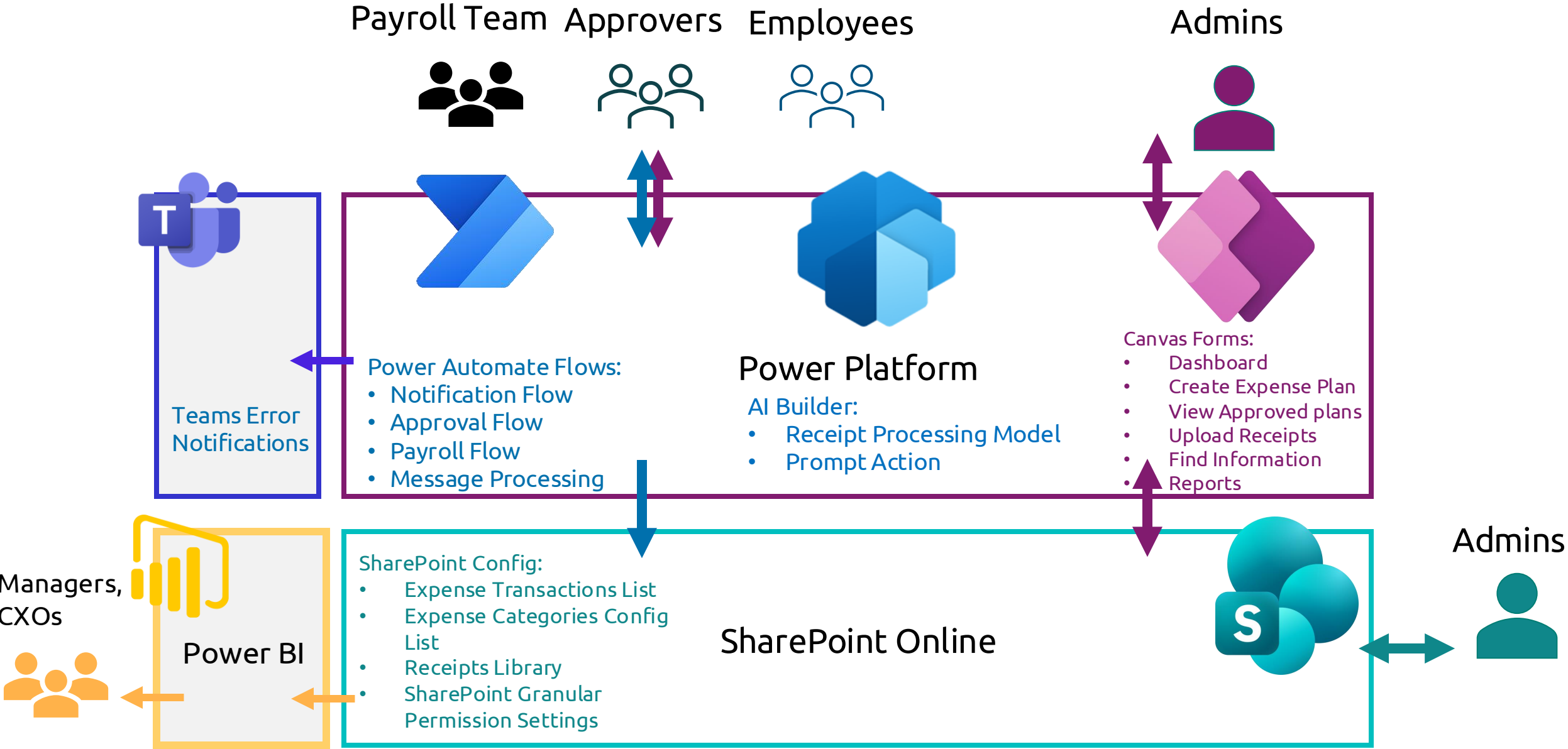


Proposed Solution: A Centralized, Automated Expense Tracker



- **Seamless Submission:** Intuitive forms for employees to quickly log expenses plans with smart, auto-populating fields.
- **Structured Data & Workflow:** Expenses are categorized and routed for approval.
- **Full Audit Trail:** Every submission, approval, and receipt is digitally tracked in one place.
- **Mobile-First Design:** Built in Power Apps for easy submission and approval on any device.
- **Faster Reimbursements:** Streamlined process from submission to payment.

Architectural Overview





Components used

Power Apps (Canvas App):

- **5-Screen App:** Welcome Dashboard, Create Expense Plan, View Expenses, Upload Receipt, Find Information, Reports
- Provides the user-friendly interface for all actors.

Data Sources (SharePoint Lists):

- **Expense Categories Config:** Defines expense categories, expense types, budget limits and approver.
- **Expense Transactions:** The main log of all submitted expenses.

Power Automate (Flows):

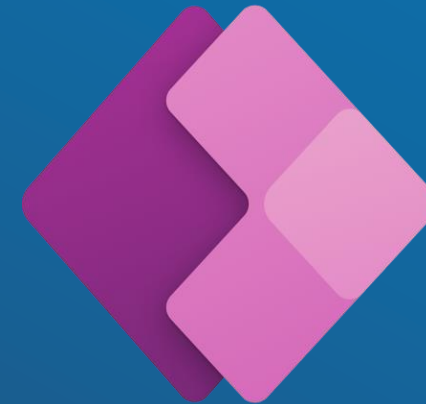
- Used for automated approval workflows, email notifications, and data processing.

Power BI:

- Used for reports.

AI Hub:

- Custom Prompt & Receipt Processor





Key Functionalities

What Users Can Do: Core Features

1. Intelligent Expense Plan Submission:

- Selecting an **Expense Category** (e.g., Travel) filters the **Expense Type** (e.g., Flight, Hotel).
- Key fields like **Budget Limit**, and **Approval Level** are auto-populated.

2. Centralized Expense Tracking:

- View all submitted expenses in a simple gallery.
- See key details at a glance: Category, Status, Date, and Budget.

3. Digital Receipt Management:

- Dedicated screen for uploading receipt images or PDFs.
- Logs the **Payment Approval Date** upon completion.



Key Functionalities

What Users Can Do: Workflow & Data

4. Structured Approval Process:

- Expenses are automatically routed based on rules from the Config List (e.g., "Director approval for expenses over \$5000").
- Clear status tracking (Pending Planning Approval → Planned → Approved → Reimbursed).

5. Master Data Management:

- The **Expense Categories Config** list acts as the "brain," controlling categories, budget limits, and approval rules.
- Ensures consistency and simplifies future updates.

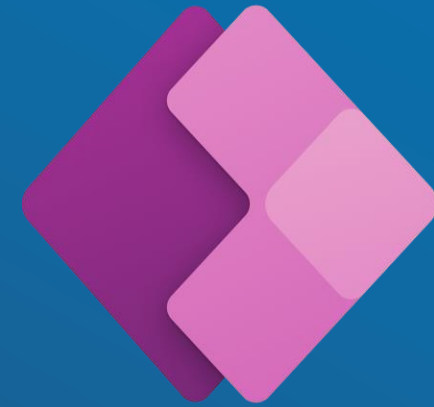
Demo Time!



Development Tips & Tricks

Canvas App

- Comment your formulas
- Use the Monitor tool
- Limit the number of controls per screen
- Use as much out of the box as possible without breaking the existing components
- Keep an eye on your Collections to keep the app running smoothly



← Back	✕ Clear data	↑ Upload	↓ Download	👤 Invite	🔗 Connect user	▶ Play published app	🔗 Copy Live monitor link	☰ Options	🔍 Filter
Published app session (See versions)									
Id	Time	Category	Operation	Result	Result info	Status	Duration (ms)		
3	16:55:56.338	ScreenLoad	Navigate (WelcomeScreen)	Success			103		
4	16:55:56.341	ScreenLoad	LoadScreen (WelcomeScr...	Success			73		
5	16:56:03.261	UserAction	Select	Success					
6	16:56:03.716	ScreenLoad	LoadScreen (ScreenSubmi...	Success			442		
7	16:56:03.922	ScreenLoad	Navigate (WelcomeScree...	Success			205		



Development Tips & Tricks

Power Automate

- Use Trigger conditions
- Limit the number of Actions per flow - Use child flows
- Use Scopes – Configure Run After
- Use Microsoft Teams connector to summarize information or error notification(s)



10:44 AM

PROD: Error in MessageProcessing

Environment: Prod
Message Processing has crashed.

Action	Status	Error_Message
block_for_an_artificaial_error	Failed	An action failed. No dependent actions succeeded.

[Link to Power Automate Flow Instance](#)



Next Steps

AI Builder

- Prediction Model : Forecast future expenses, flag potential overspending
- Document Processing: Handle invoices or other document types that aren't standard receipts
- MCP(Model Context Protocol) Integration: Here are a few examples of tasks that can be managed by Copilot using MCP calls to Power Platform -
 - Add a SEK 45 taxi expense from yesterday in the Travel category.
 - Summarize spending by category for Q3
 - Predict next month's food expense



Q&As

Thank You!