

Building a Power App for Expense Submissions

A comprehensive guide demonstrating the development of a user-friendly app that seamlessly connects to the SharePoint list created in the previous guide, enabling users to effortlessly add, edit, and delete expense items.

Step 1: Create the App from the SharePoint List

- Go to the SharePoint site where you have the list of expense submissions.
- From the SharePoint list, click on Integrate and then Power Apps. Select Create an app from the menu.
- Power Apps will generate a three-screen app for you: a browse screen, a detail screen, and an edit screen.

Step 2: Save the App

- Click Save.
- Name the app: **Expense Submission App**.

Step 3: Customize the Browse Screen

Note: In the following steps, the *italicized* words are likely the names assigned in the Power App, but results may vary.

- On the browse screen, *BrowseScreen1*, select the app label, *LblAppName1*, and reduce the font size to fit on the screen.
- Select the gallery, *BrowseGallery1*, from the properties ensure the layout is set to Title, subtitle and body.
- Expand the browse gallery, *BrowseGallery1*.
- To adjust the gallery item view, select the first item on the gallery.
 - Select the title label, *Title1*, and change the Text property to **ThisItem.'Employee Name'**.
 - Select the subtitle label, *Subtitle1*, and change the Text property to **"Expense ID " & ThisItem.ID**.
 - Select the body label, *Body1*, and change the Text property to **ThisItem.'Type of Expense'.Value**.
 - Optional: For more detail, you can use this formula: **ThisItem.'Type of Expense'.Value & " for \$" & Text(ThisItem.Amount, "[\$-en-US]0.00")**.
- Select the title, subtitle, and body labels, *Title1*, *Subtitle1* and *Body1*, and reduce the width to 450.
- Select the first item on the gallery. From the Insert tab, add the Money icon and drag and drop the icon to the left of the next arrow, *NextArrow1*.
- Change the Color property of the money icon, *Icon1*, to this formula: **Switch(ThisItem.'Approval Status'.Value, "Rejected", Color.Red, "Approved", Color.Green, "Pending", Color.Yellow)**. This will show the approval status of each expense item with a different color.
- Select the gallery, *BrowseGallery1*, and update the Items property of the gallery to this formula: **SortByColumns(Filter([@'Expense Submissions'], StartsWith('Employee Name', TextSearchBox1.Text)), "EmployeeName", If(SortDescending1, SortOrder.Descending, SortOrder.Ascending))**. This will allow you to search by employee name instead of title. If you receive an error, confirm the green section of the formula is the correct name of the SharePoint List.

Step 4: Customize the Detail Screen

- Select the detail screen, *DetailScreen1*, and expand.
- Select the form, *DetailForm1*, and expand.
- Select the Amount data card, *Amount_DataCard1*.
- Click the 3 dots and unlock the Amount data card.
- Expand the Amount data card, *Amount_DataCard1*.
- Select the amount data card value, *DataCardValue4*, and change the Text property to "\$" & **Text(Round(Parent.Default, 2), "0.00")**. This will format the amount to show two decimal places.

Step 5: Customize the Edit Screen

- Select and expand the edit screen, *EditScreen1*.
- Expand the edit form, *EditForm1*, and select *Approval Status_DataCard2*.
- To prevent users from changing the status of the approval when a user submits the expense, you should delete the approval card from the form by following these steps: click on the 3 dots and delete the approval data card.

Step 6: Customize the Color Theme (Optional)

- You can change the color theme of the app by clicking Theme on the top ribbon. Make sure to deselect any fields you may have chosen to be able to see the Theme button.

Step 7: Test the App

- Select the browse screen, *BrowseScreen1*.
- To test the app, click on Play on the top right of the screen.
- Suggestions for testing the app are below. Make sure to go back to the SharePoint List and watch how the changes in the app also change the list data.
 - Add a new item:
 - Employee Name: Emily Brown
 - Date of Expense: 10/25/24
 - Type of Expense: Meal
 - Amount: 92.00
 - Notes: Dinner with customer
 - Attachment: Receipt 4
 - Change an item: Edit Jack Peterson's expense amount from \$3700.88 to \$370.88
 - Try searching an item: Search for Emily. There should be two expenses.
 - Delete an expense: Emily's expense for \$92.00.
- To exit the test screen, click the X.