



# Robotic Process Automation in a Day

Lab 7 – Use Microsoft Teams to integrate approvals

30 mins

February 2023



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## Lab Overview

In previous labs, you have created a cloud flow for Contoso Coffee shop, that will be triggered when a new email with invoice file attachment is received in the outlook inbox. It will use AI Builder to parse data information out of the invoice file attachment and use that to enter the Contoso Coffee shop invoice management desktop app through a desktop flow.

Now Contoso Coffee shop company can leverage this automation to process invoices automatically and we don't need to manually check email, enter data step by step. However, the Contoso Coffee shop company wants to make sure the automation will not send out payments to vendors automatically, because it has finance consequence. The company wants a human supervisor to approve and confirm the invoice is real and ready for payment before the automation can move to the next step. Power Automate provides seamless build-in human approval mechanisms that can be used for those types of scenarios.

You will complete the following tasks in this lab, which will complete the end-to-end invoice processing solution:

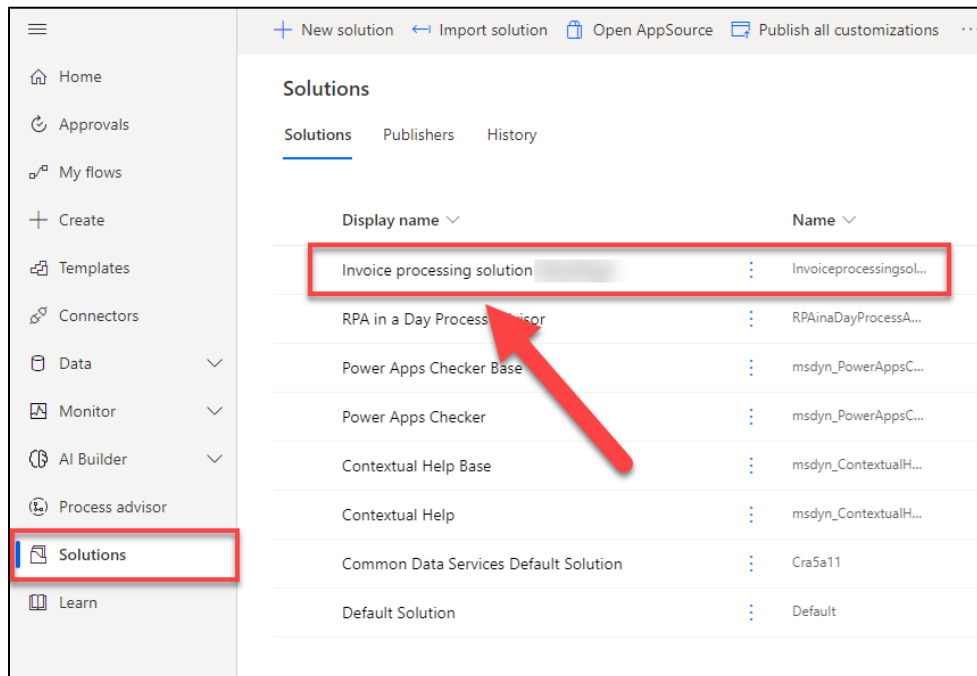
- Integrate a Microsoft Teams-based approval model and the associated conditional logic into the invoice processing Cloud flow
- Integrate the Desktop flow for entering the invoice information into the approval process
- Integrate Outlook-based approval/rejection notifications into the invoice process
- Perform a test of the end-to-end invoice processing Cloud flow

## Prerequisites

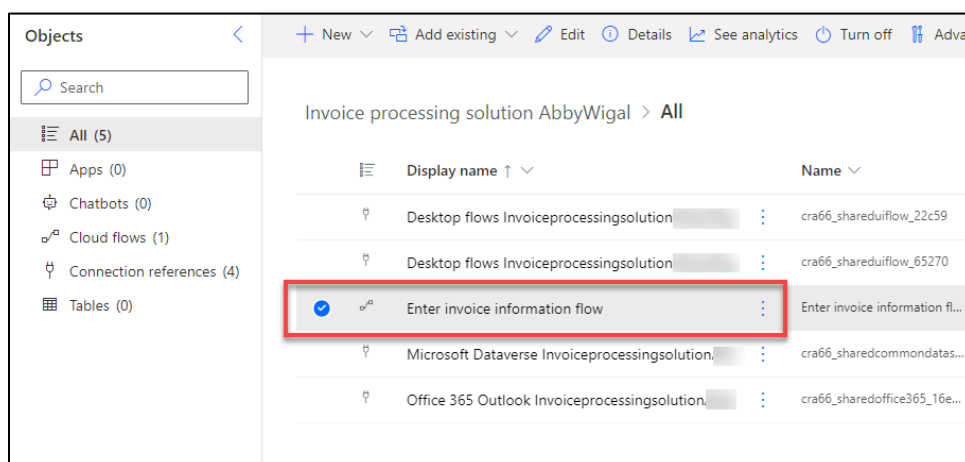
This lab builds on the initial setup lab (lab 1), and labs 2-6– ensure these labs are complete.

# Use Microsoft Teams to get approval. End to end integration

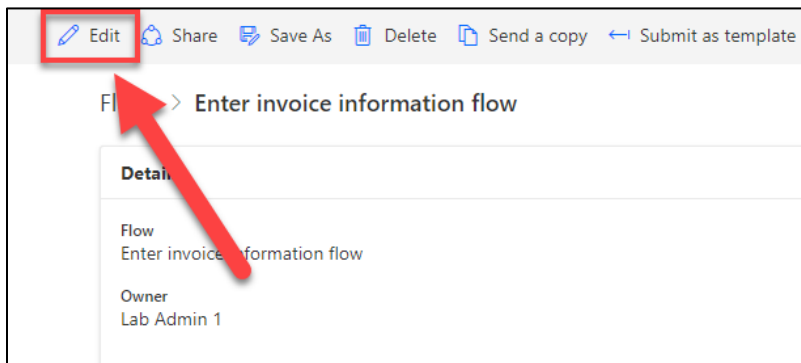
1. Open a new web browser and navigate to <https://make.powerautomate.com>. Sign-in if needed.
2. Select **Solutions** from the menu to the left of the screen, then open the **Invoice processing solution**.



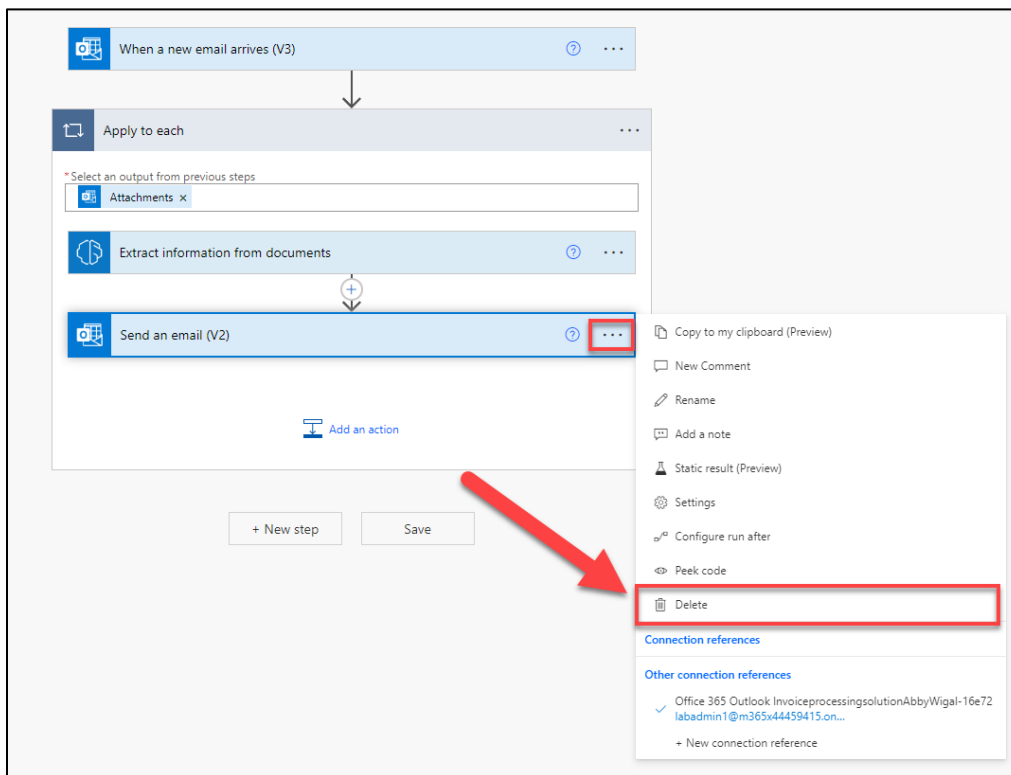
3. Next, open the **Enter invoice information flow** that you created in Lab 5.



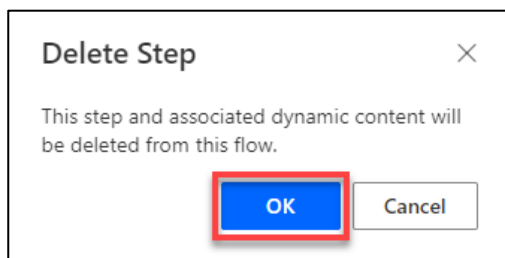
4. From the tool bar at the top of your screen, select **Edit**.



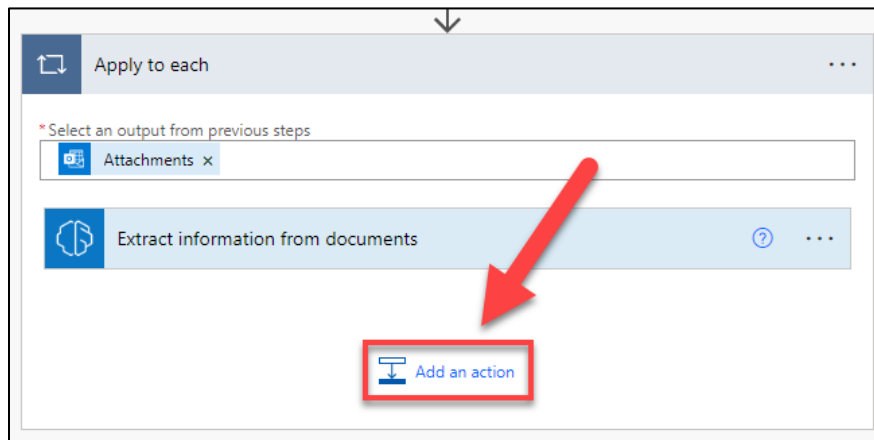
5. Expand the **Apply to each** box. To the right of the **Send an email (V2)** action, select the **ellipses (...)**, then select **Delete** from the options menu.



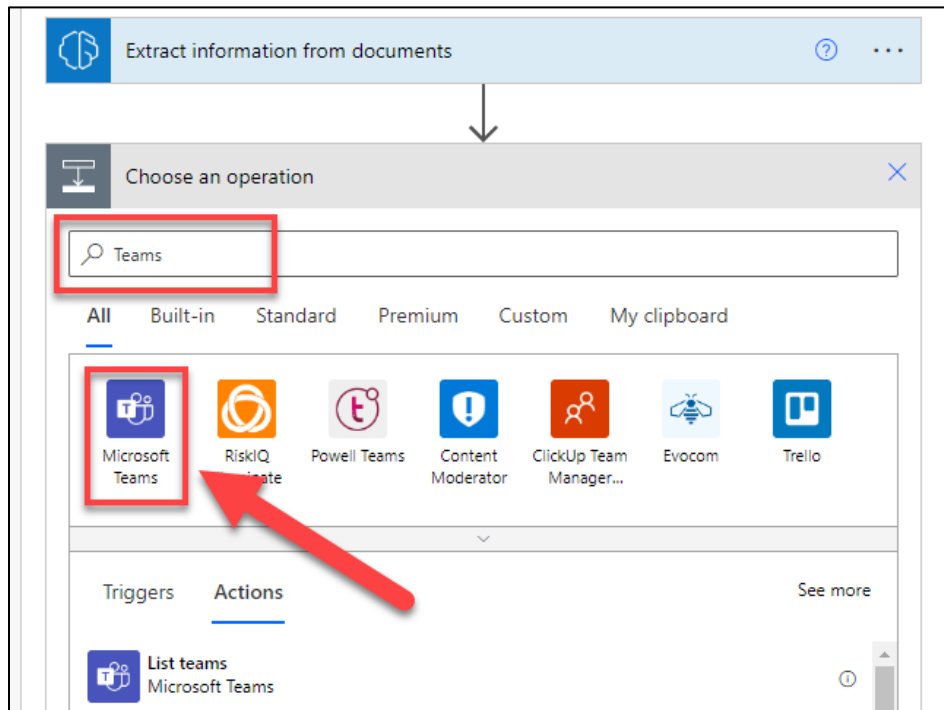
6. Within the **Delete Step** dialog box, select **OK**.



7. Next, below the **Extract information from documents** action, select **Add an action**.



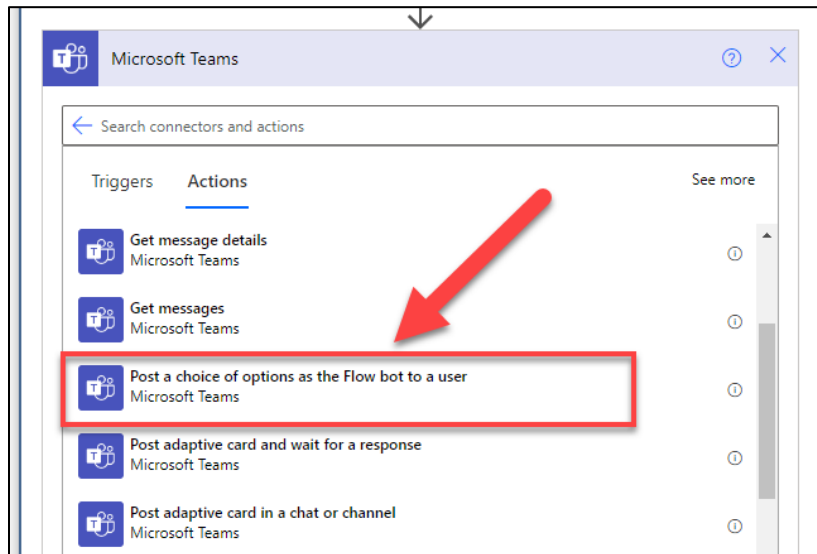
8. Within the search bar for the new action, search for **Teams**. From the section above the Actions list, select **Microsoft Teams**.



**Important:** The next actions can be taken following either of the two approaches. 1) Using either very simple method, that requires action "Post a choice of options as the Flow bot to a user" or 2) A richer and innovative approach that requires action "Post an Adaptive Card and wait for a response", that utilizes Microsoft's technology called Adaptive Cards.

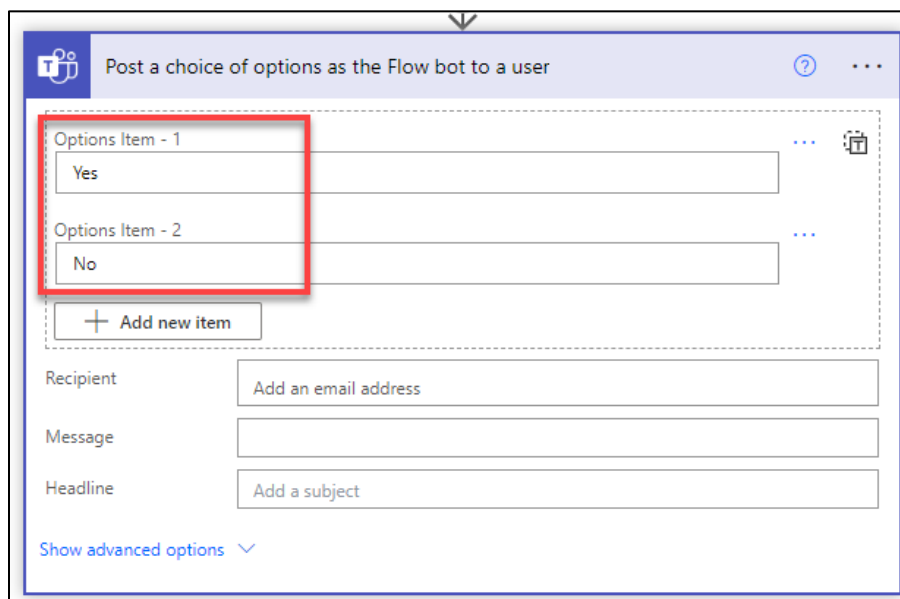
**Note:** If you'd like to learn the more advanced: Adaptive Cards approach instead of using the basic choice action, go to **Advanced learning chapter** at the end of this Lab document. Otherwise please continue here.

9. Then, from the list of Actions, select **Post a choice of options as the Flow bot to a user**.



10. Next, establish your connection to Teams. Within the **Options Item – 1** textbox, enter **Yes**.

11. Then, select **+ Add new item**. In the **Options Item – 2** textbox, enter **No**.



12. Using the following values below, fill in the information for the **Recipient**, **Message**, and **Headline** text boxes. You will find the values for the Message field by searching for them within the Dynamic content pane:

- **Recipient:** Your email address (User ID)
- **Message:** We have received an invoice with amount of **Total value** (from dynamic content under **AI Builder** action), for the date of **Date value** (from dynamic content under **AI Builder** action). Contact person is **Contact value** (from dynamic content under **AI Builder** action). Would you like to approve this?
- **Headline:** Please approve this invoice

Post a choice of options as the Flow bot to a user

Options Item - 1  
Yes

Options Item - 2  
No

+ Add new item

Recipient  
Lab Admin 1 x ;

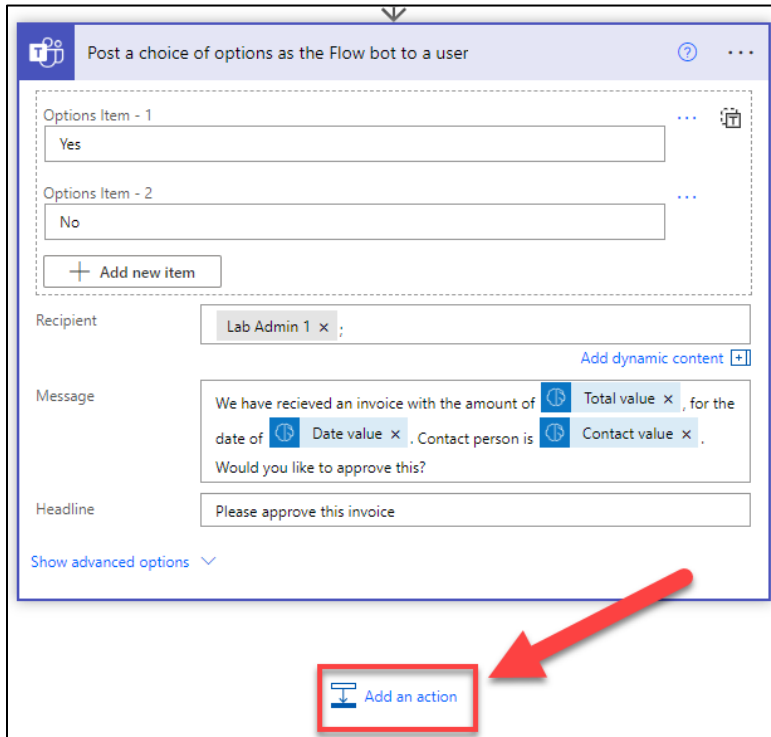
Message  
We have recieved an invoice with the amount of [Total value x], for the date of [Date value x], Contact person is [Contact value x]. Would you like to approve this?

Headline  
Please approve this invoice

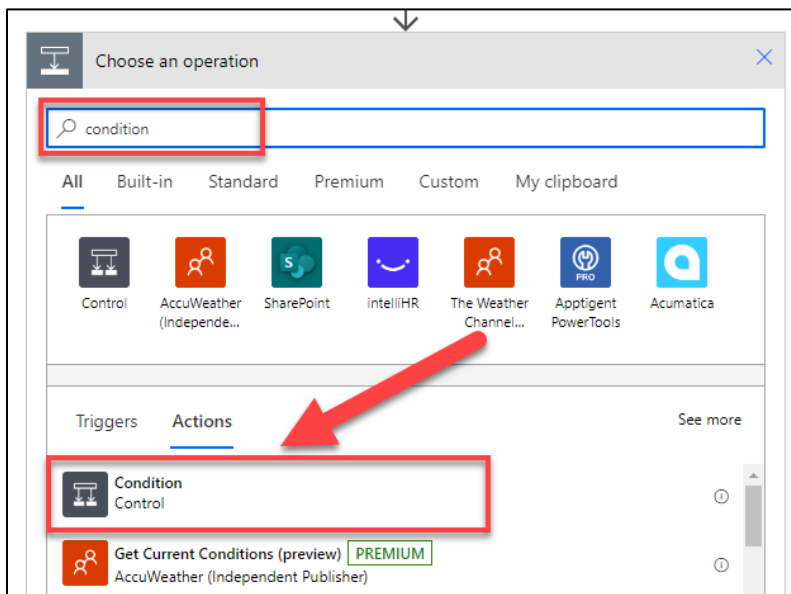
Show advanced options



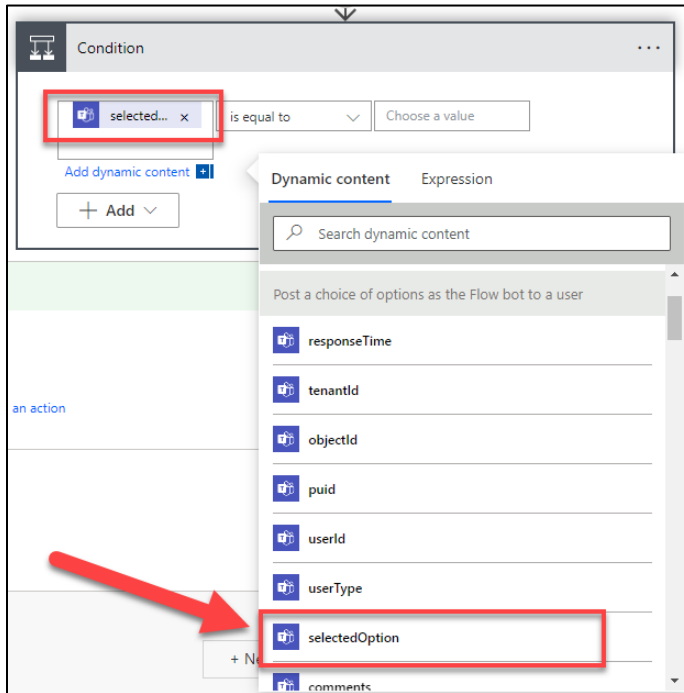
13. Now we will add a branch into our flow, so the automation will perform different action paths based on different approval return results. Select **Add an action**.



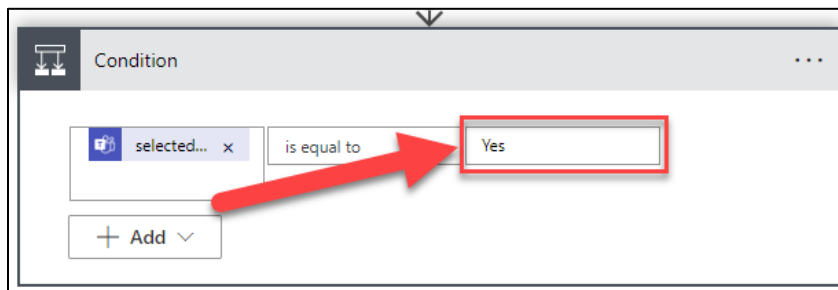
14. Within the search bar, search for **condition**. From the Actions list, select **Condition**.



15. Within the **Choose a value** field, select **selectedOption** (from Dynamic content, under the previous action of **Post a choice of options as the Flow bot to a user**)

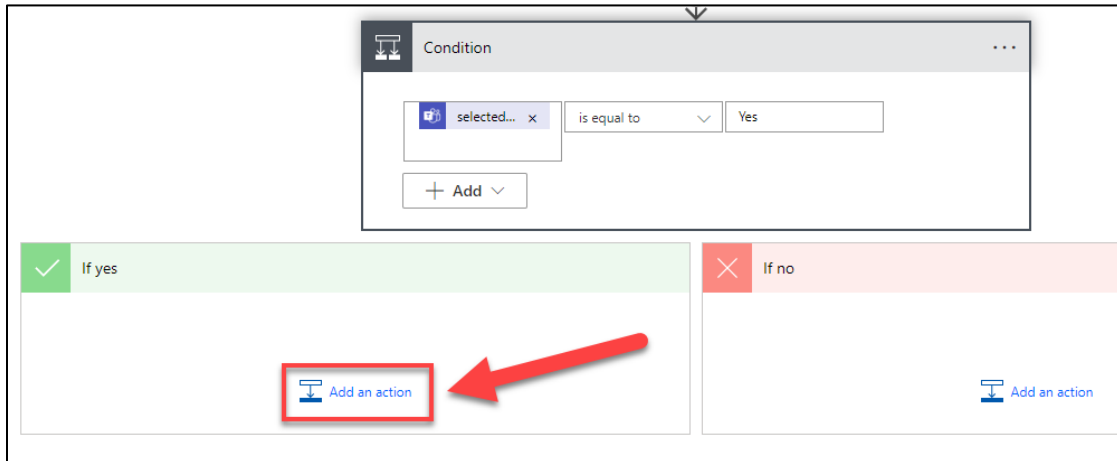


16. Within the **Choose a value** field, enter in the value **Yes**.



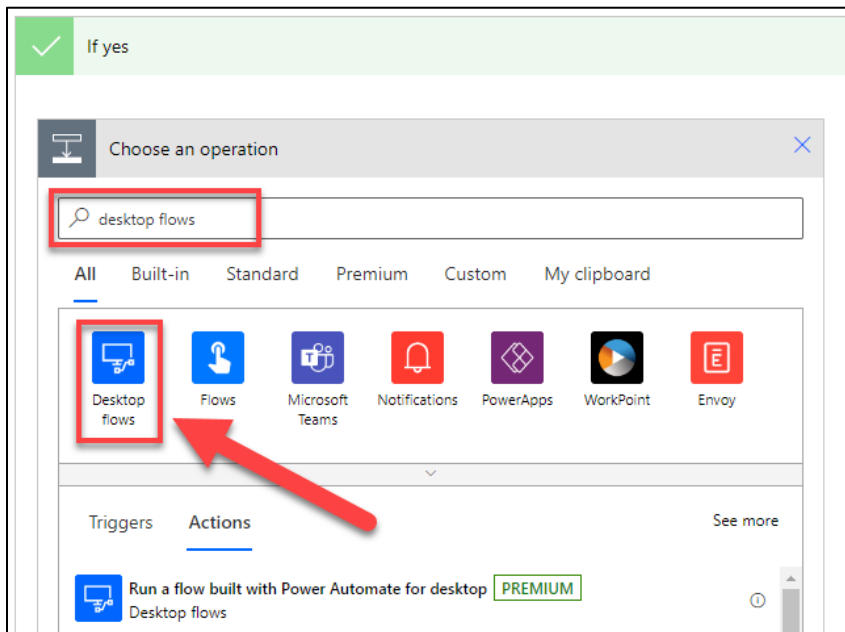
**Note:** This field is case sensitive. Make sure the capitalization is same as what you specified in step 10.

17. Select **Add an action** under the **If yes** branch.

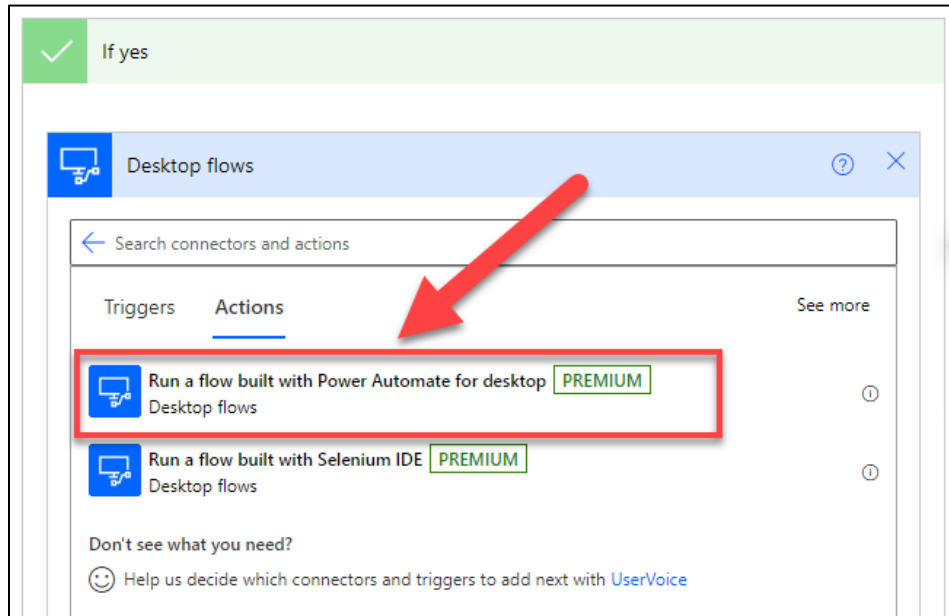


18. If the approval result is Yes, we will launch the desktop flow to process this invoice and then send a confirmation email to the invoice sender.

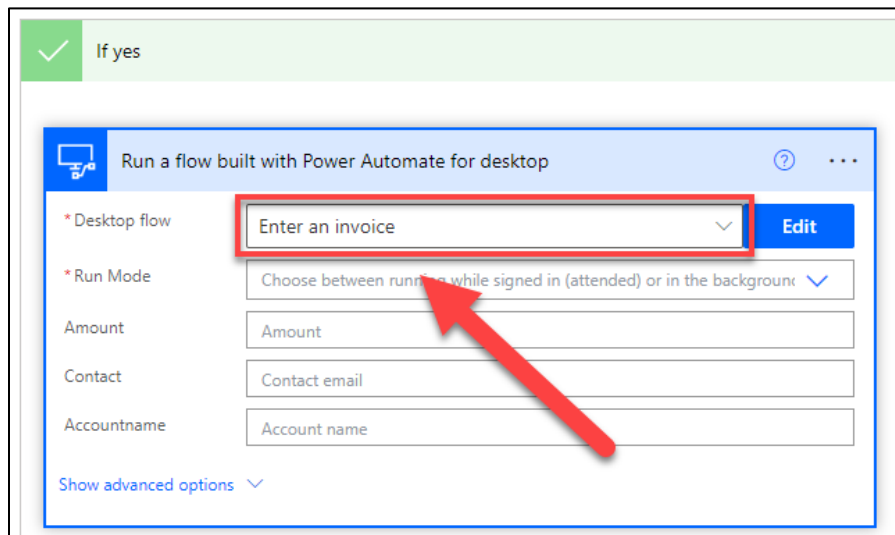
19. Using the search bar, search for desktop flows. Then, from the section above the list of Actions, select **Desktop flows**.



20. From the Actions list, select **Run a flow built with Power Automate for desktop (PREMIUM)**.



21. From the Desktop flow drop-down, select **Enter an invoice** flow.



22. Using the values below, enter in the information for the **Run Mode**, **Amount**, **Contact**, and **Accountname**. Use the **Dynamic content** pane to search for the correct values to enter into the different fields.

**Run Mode:** Attended (runs when you're signed in)

**Amount:** Total value (from dynamic content under AI Builder action)

**Contact:** Contact value (from dynamic content under AI Builder action)

**Accountname:** Bill to value (from dynamic content under AI Builder action)

✓ If yes

Run a flow built with Power Automate for desktop

\* Desktop flow Enter an invoice Edit

\* Run Mode Attended (runs when you're signed in) ✓

Amount Total value x

Contact Contact value x

Accountname Bill to value x

Show advanced options

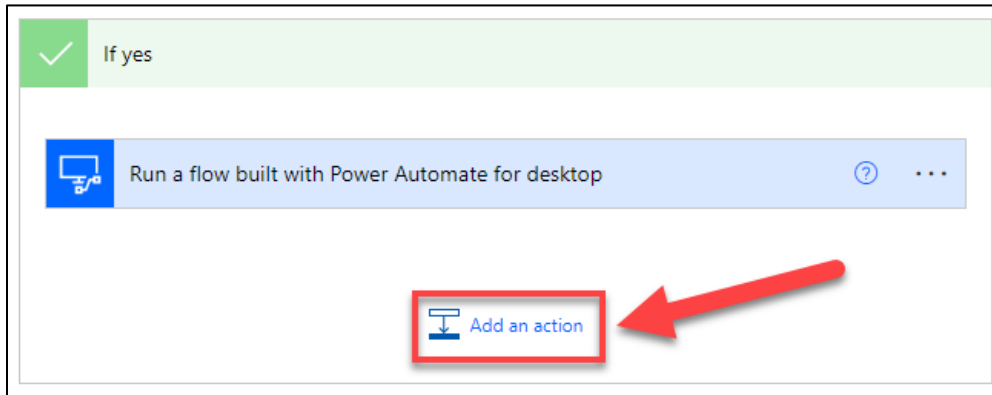
23. Select the **Desktop flow action title** to collapse the action view.

✓ If yes

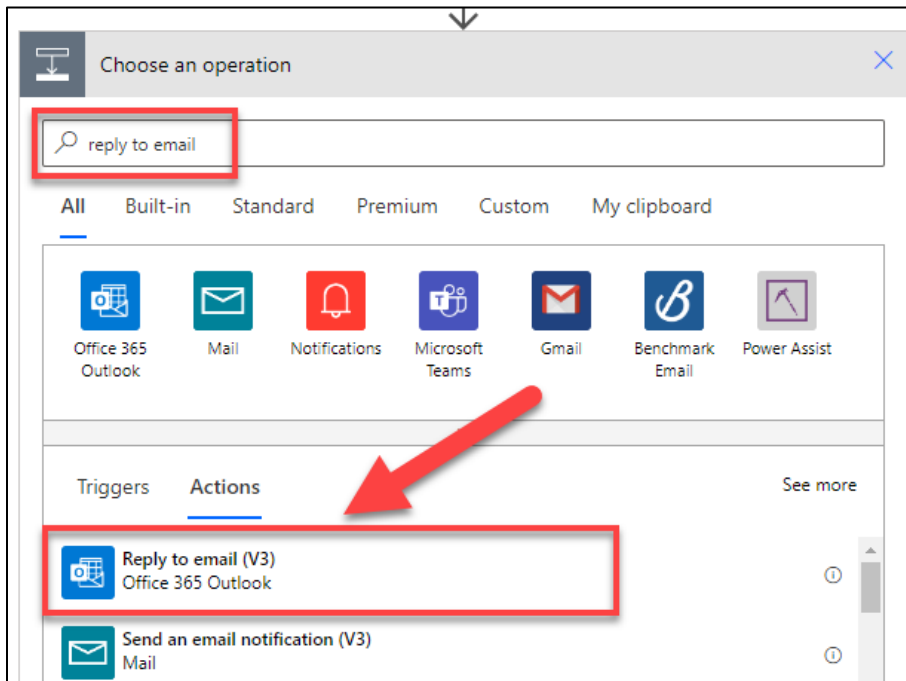
Run a flow built with Power Automate for desktop

Add an action

24. Select **Add an action** under the **If yes** branch.



25. Within the search bar, search for **reply to email**. Then, select the **Reply to email (V3) – Office 365 Outlook** action from the list.



26. Using the following information and values, fill in the fields within the new action.

- Message id: **Message Id** (from dynamic content for action **When a new email arrives (V3)**)
- Body: Your invoice of amount **Total value** (from dynamic content under AI Builder action) is approved.

Reply to email (V3)

\* Message Id: Message Id x

Body: Your invoice of amount Total value x is approved.

Reply All: True to reply to all recipients. (default: False)

Attachments Name - 1: Attachment name

Attachments Content - 1: Attachment content

27. Next, select **Show advanced options**.

28. Within the **Subject** field, enter **Your invoice is approved**.

+ Add new item

Original Mailbox Address: Address of the shared mailbox to reply from.

To: Example: recipient1@domain.com; recipient2@domain.com

CC: Example: recipient1@domain.com; recipient2@domain.com

BCC: Example: recipient1@domain.com; recipient2@domain.com

Subject: Your invoice is approved

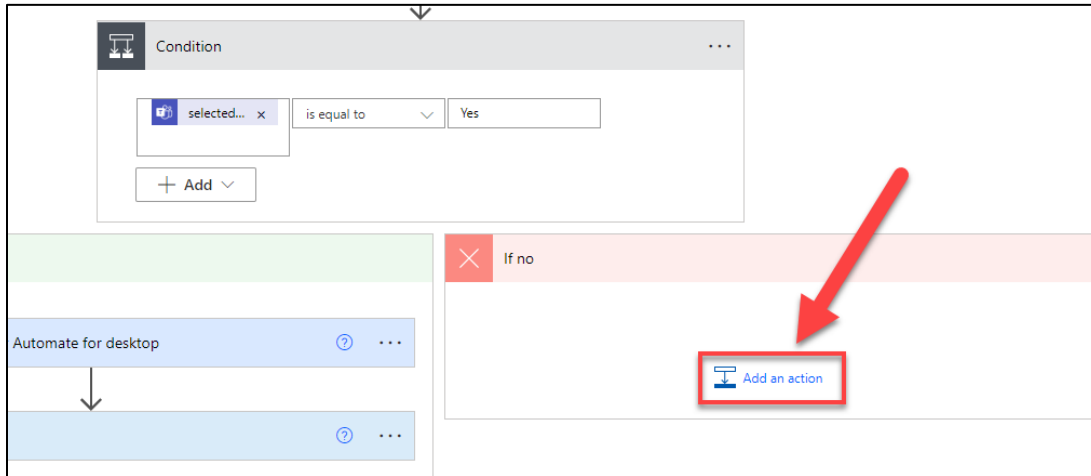
Importance: Pick an importance. (default: Low)

Hide advanced options ^

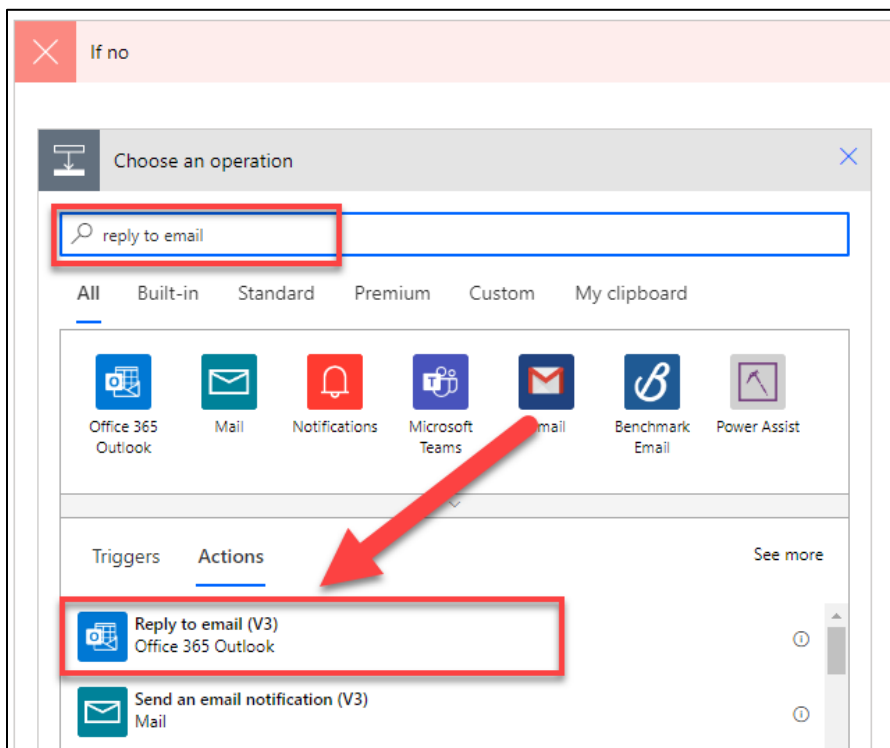
29. **Collapse** the actions within the **If yes** branch by selecting the titles of the actions.

30. Next, we will create the steps for the case if the approval result was **No**.

31. Select **Add an action** under **If no** branch.



32. Using the search bar, search for **reply to email**. Then, from the Actions list, select **Reply to email (V3) – Office 365 Outlook**.





33. Using the values and information below, fill in the fields within the newly added action. Use the dynamic content pane to search for specific values needed for some of the fields.

- Message id: **Message Id** (from dynamic content for action **When a new email arrives (V3)**)
- Body: Your invoice of amount **Total value** (from dynamic content from AI Builder action) was rejected.

✕ If no

Reply to email (V3) 2

\* Message Id Message Id x

Body

Font 12 B I U [Icons] </>

Your invoice of amount Total value x was rejected.

Reply All True to reply to all recipients. (default: False) ✓

Attachments Name - 1

Attachment name

34. Select **Show advanced options**.

35. Within the **Subject** field, enter **Your invoice is rejected**.

Original Mailbox Address Address of the shared mailbox to reply from.

To Example: recipient1@domain.com; recipient2@domain.com

CC Example: recipient1@domain.com; recipient2@domain.com

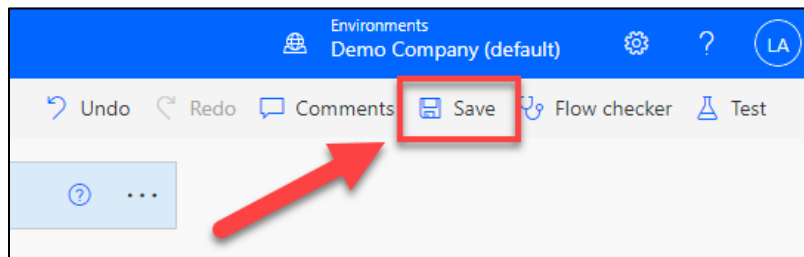
BCC Example: recipient1@domain.com; recipient2@domain.com

Subject Your invoice is rejected

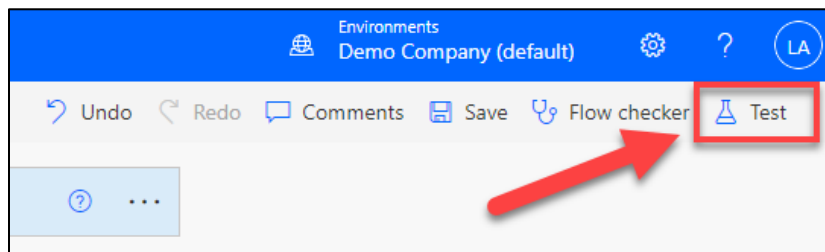
Importance Pick an importance. (default: Low) ✓

Hide advanced options ^

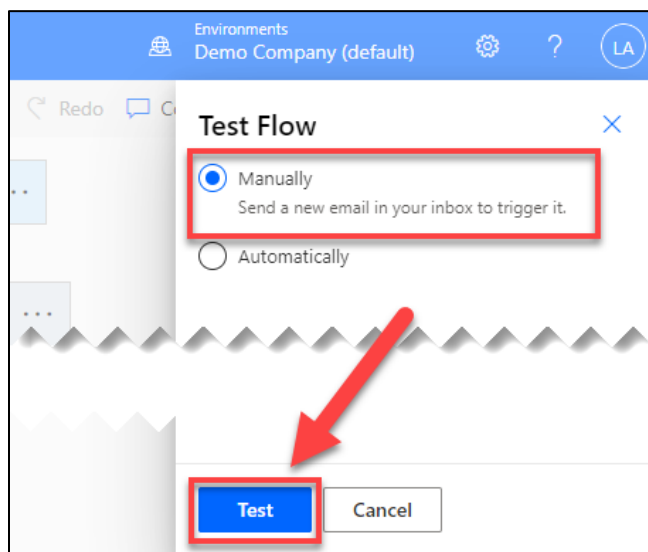
36. From the tool bar at the top of the screen, in the top right corner, select **Save**.



37. Then, select **Test**.



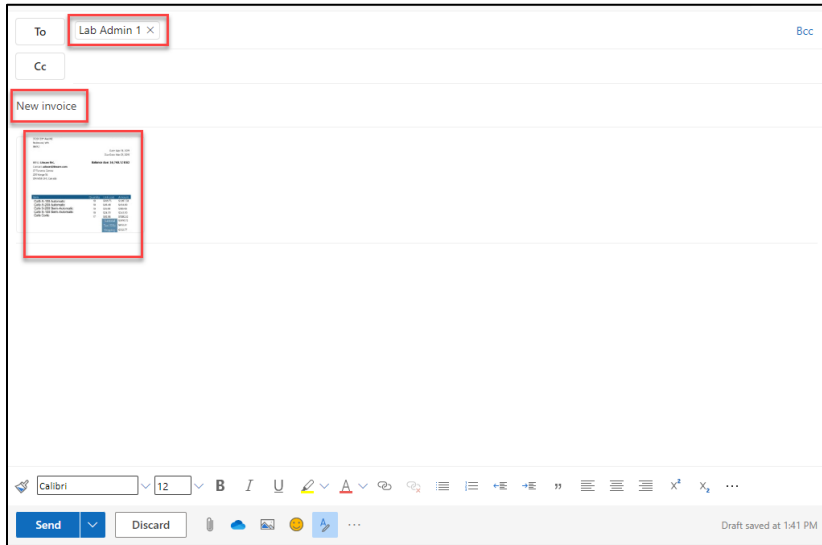
38. Within the Test Flow pane, select **Manually**, then select **Test**.



39. In a separate web browser tab, open the **Microsoft Teams** app (**Note:** use the browser version, not the desktop app version) and **sign in** using the same test account. The web version of **Microsoft Teams** is available at: <https://teams.microsoft.com/>

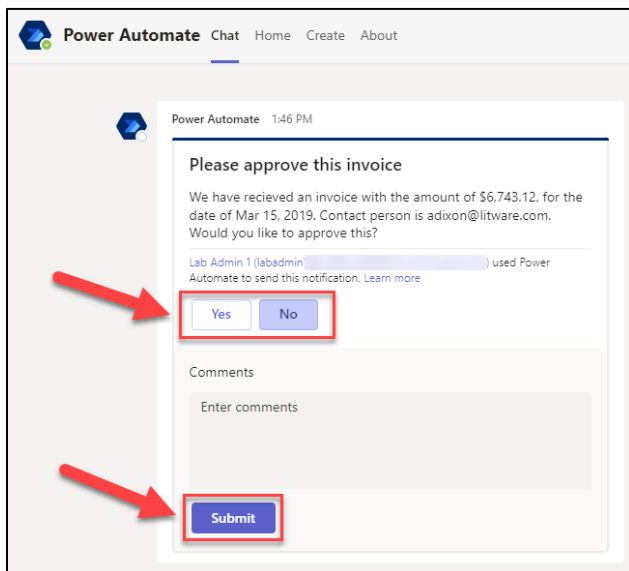
40. In another separate web browser tab, open the **Office 365 Outlook** app. The web version of **Microsoft Outlook** is available at: <https://outlook.office.com/mail/>

41. Within Microsoft Outlook, compose a new email with the following settings:
- a. To: {email address of the user identity you are using in this lab}
  - b. Subject: **New invoice**
  - c. Attachments: **newinvoice.jpg** (from the lab resource files)

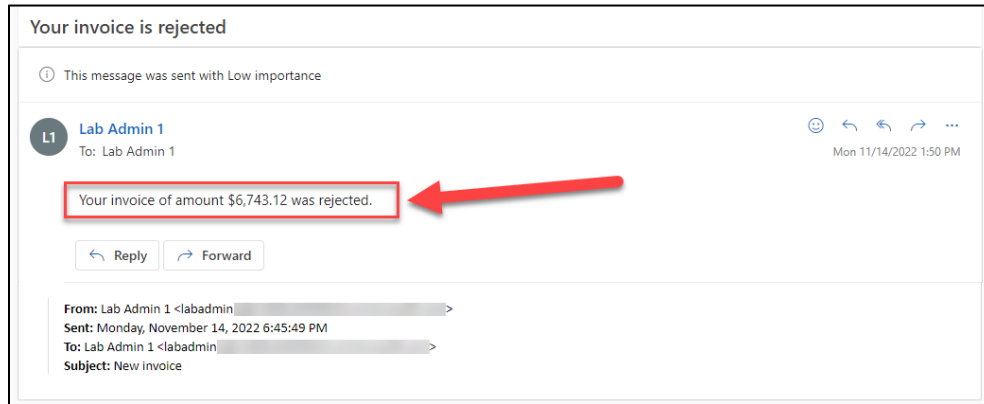


42. **Send** the email and wait for the flow to run.

43. Wait for an **approval request Adaptive Card** to you to appear in the **Teams** tab – Select **Yes** or **No**, and then select **Submit** to approve or reject the invoice as desired.

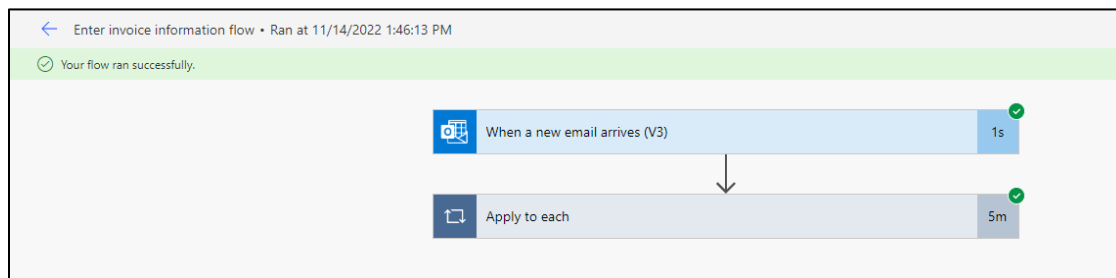


44. Within the **Outlook** tab, check for a confirmation email that matches the option you selected.



45. **Repeat** the test using the other test case (accept or reject)

46. Like previous labs, you can monitor the run status from the flow details page and run details page. Navigate back to the **Enter invoice information flow** and see that your flow has ran successfully.



# Check your knowledge

Lab 7

5 mins

1. When we want to send an approval to a user inside of Microsoft Teams, which is the appropriate action, from the Microsoft Teams connector, for us to choose?
  - A. Post a choice of options as the Flow bot to a user
  - B. Post an adaptive card wait for a response
  - C. None of the above
  - D. Either A or B
2. When we are entering "Yes" in "choose a value field" in the Condition action, we need to make sure the capitalization is same as the options in the Teams action
  - A. True
  - B. False
3. After selecting Add an action under If No branch, we need to communicate to our email recipient that their invoice has not been approved. What action do we need to select \_\_\_\_\_?
  - A. Reply to email
  - B. Send an email notification
  - C. Run a flow built with Power Automate Desktop
  - D. Run a flow built with Selenium IDE

## Answer Key

1. When we want to send an approval to a user inside of Microsoft Teams, which is the appropriate action, from the Microsoft Teams connector, for us to choose?
  - A. Post a choice of options as the Flow bot to a user
  - B. Post an adaptive card wait for a response
  - C. None of the above
  - D. Either A or B**

Answer: **D.** Post a choice of options as the Flow bot to a user or post an adaptive card and wait for a response.

2. When we are entering "Yes" in "choose a value field" in the Condition action, we need to make sure the capitalization is same as the options in the Teams action
  - A. True**
  - B. False

Answer: **A** True – If the capitalization is different, the condition will not be met.

3. After selecting Add an action under If No branch, we need to communicate to our email recipient that their invoice has not been approved. What action do we need to select \_\_\_\_\_?
  - A. Reply to email**
  - B. Send an email notification
  - C. Run a flow built with Power Automate Desktop
  - D. Run a flow built with Selenium IDE

Answer: **A.** Reply to email. This will allow our email to look like a reply to the original email, giving it a personal touch.

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