Robotic Process Automation in a Day

Lab 5 – Connect with API world. Use Outlook email to trigger desktop flows and pass inputs

30 mins

February 2023

Lab Overview

In a previous lab, you have created a sample cloud flow that can run a desktop flow on your computer and enter the invoice information for Contoso Coffee shop. However, you must manually trigger that cloud flow to run every time. The Contoso Coffee shop is using an outlook email box to receive incoming invoices from different vendors as attachment files. So next, we want to build a new cloud flow that can be automatically triggered every time an email arrives to that inbox. To do this, we need to use an outlook connector in the cloud flow.

You will complete the following tasks in this lab:

- Create a new Solution to package the end-to-end invoice processing solution
- Create a new Cloud flow that initiates the invoicing process via receipt of an email
- Integrate the Desktop flow from Lab 2 into the Cloud flow
- Perform a test run of the new Cloud flow

Prerequisites

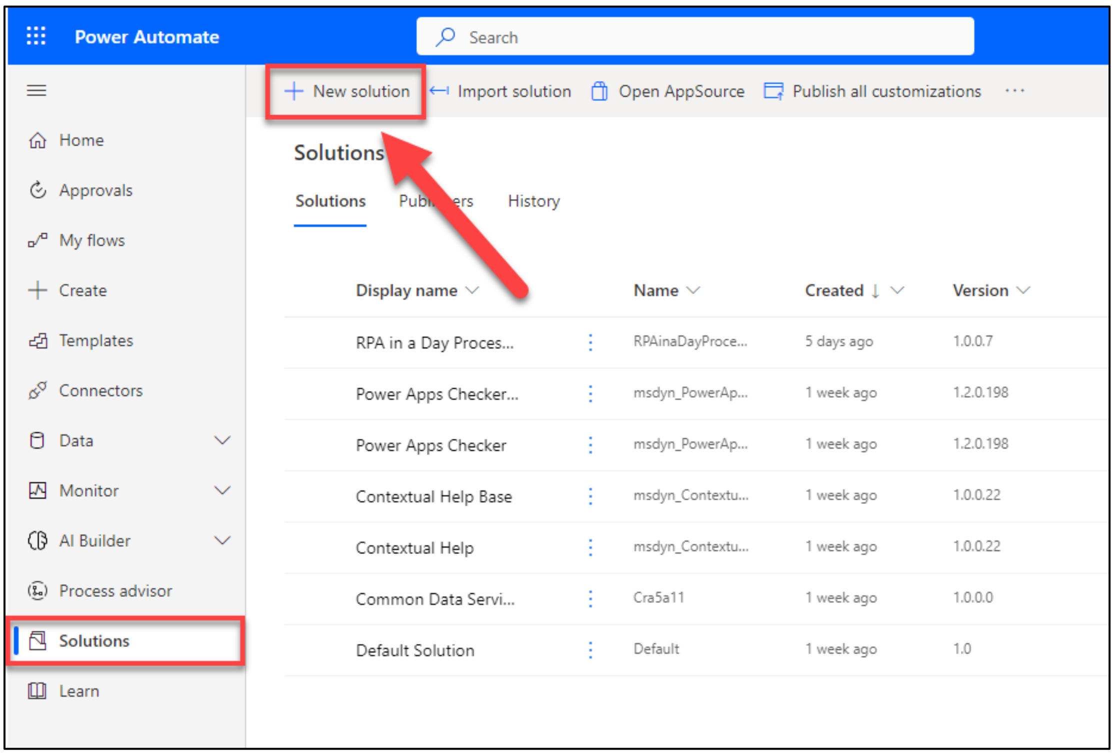
This lab builds on top of previous labs – ensure these labs are complete.

About Solutions

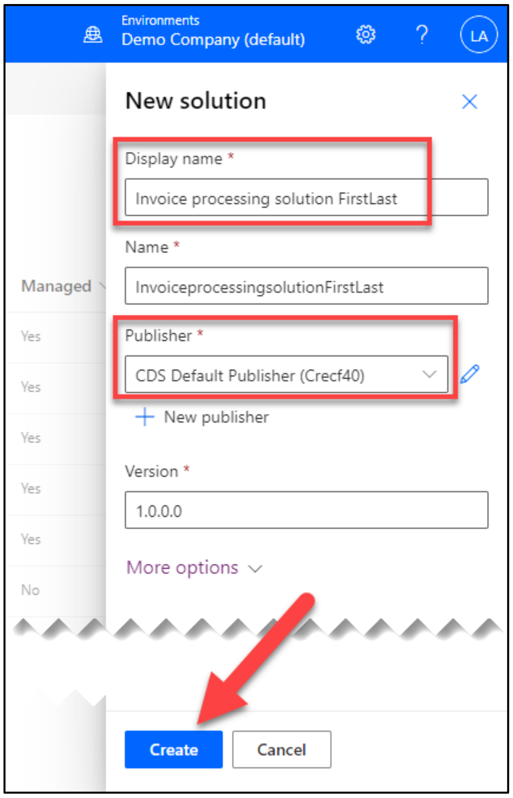
This lab introduces a concept called Solutions. Solutions are what developers use to author, package, and maintain units of software that extend Microsoft DataVerse. For example, Dynamics 365 for Sales, Marketing, Customer Service apps are composed of solutions. Customizers and developers distribute software through solutions so that organizations can use Microsoft DataVerse to install and uninstall the business functionality defined by the solution. For additional information about Solutions, please see the following link: https://docs.microsoft.com/en-us/powerapps/developer/common-data-service/introduction-solutions

Connect with API world. Create a solution. Use an outlook email to trigger desktop flow and pass input from a cloud flow

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 and then select **+ New solution** at the top of the screen.



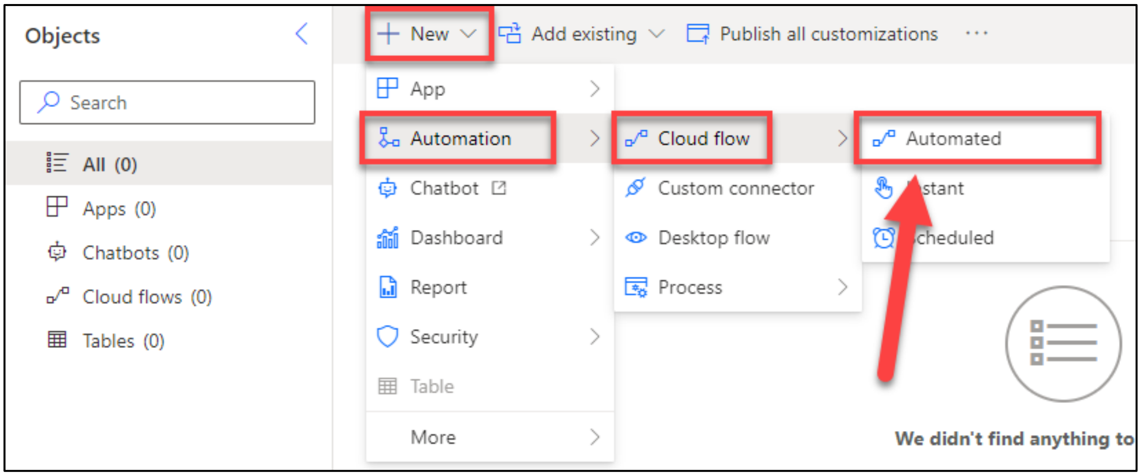
3. **Name** the new solution **Invoice processing solution <MyUserName>**. Set **CDS Default Publisher** as Publisher. Then, select **Create**.



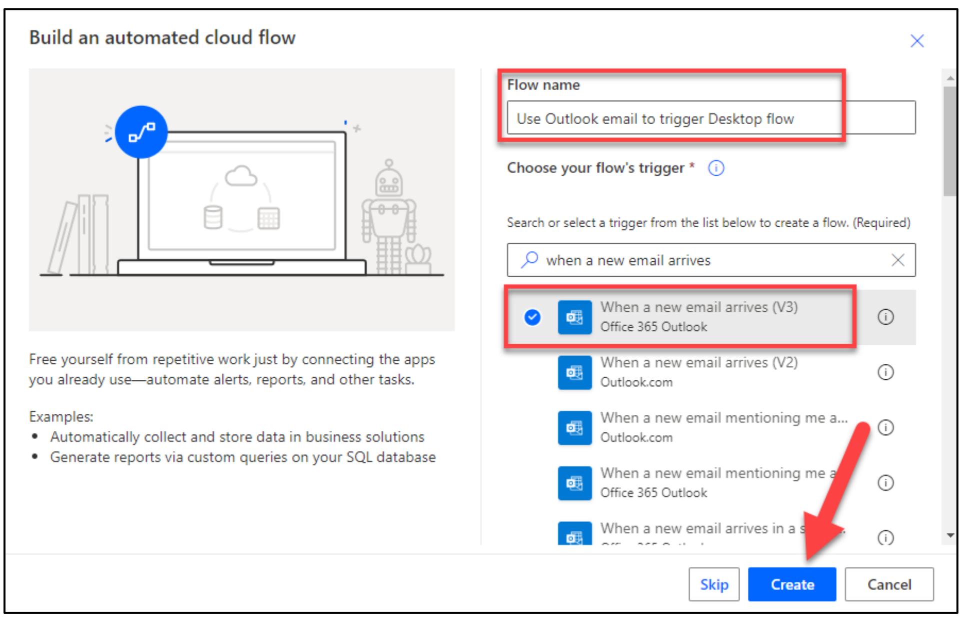
Note: For the purposes of this lab, using the CDS Default Publisher is acceptable. For production scenarios, please refer to this link for additional information: https://docs.microsoft.com/en-us/power-platform/alm/solution-concepts-alm#solution-publisher

4. Wait for the solution to be created. You should automatically be taken to the solution you just created when it has finished.

5. Select **+New** from the top of the screen. Then, by hovering over **Automation,** and **Cloud flow**, select **Automated**.

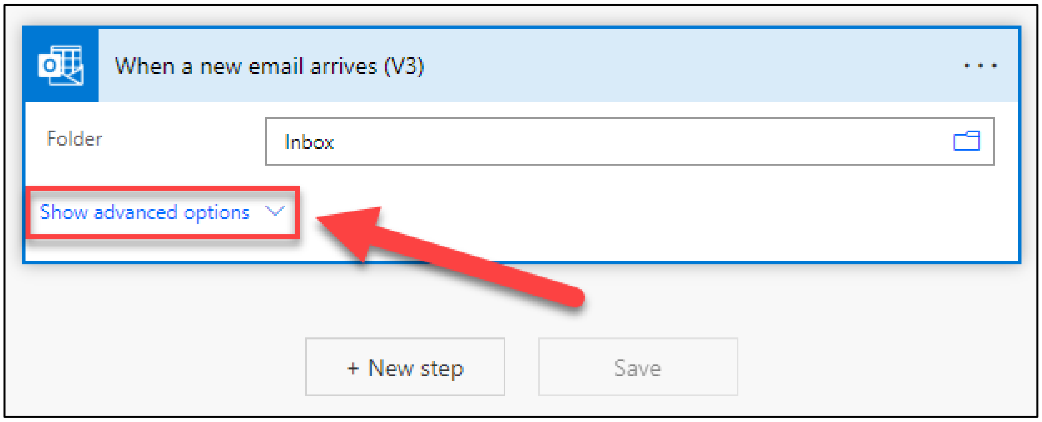


6. Within the **Build an automated cloud flow** dialog, **name** your new flow **Use Outlook email to trigger Desktop flow** Then, search for and select **when a new email arrives (V3)** as the trigger event. Then, select the **Create** button.

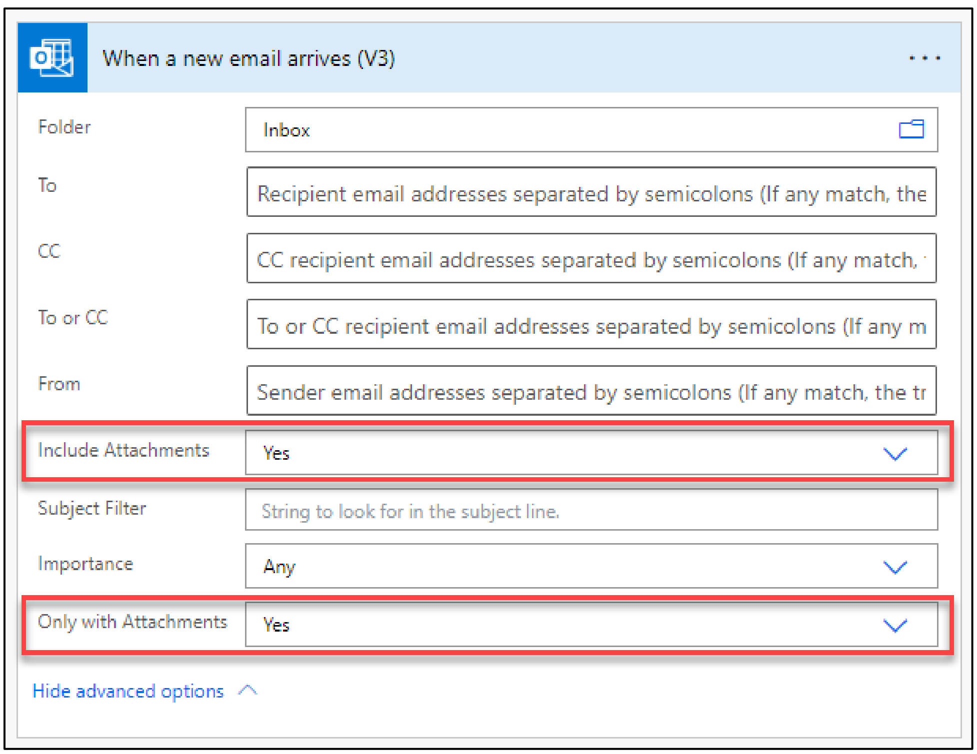


7. You will then be within the flow designer. **Sign in** with your **Outlook** account.
8. In the trigger card, **When a new email arrives (V3)**, select **Show advanced options**.

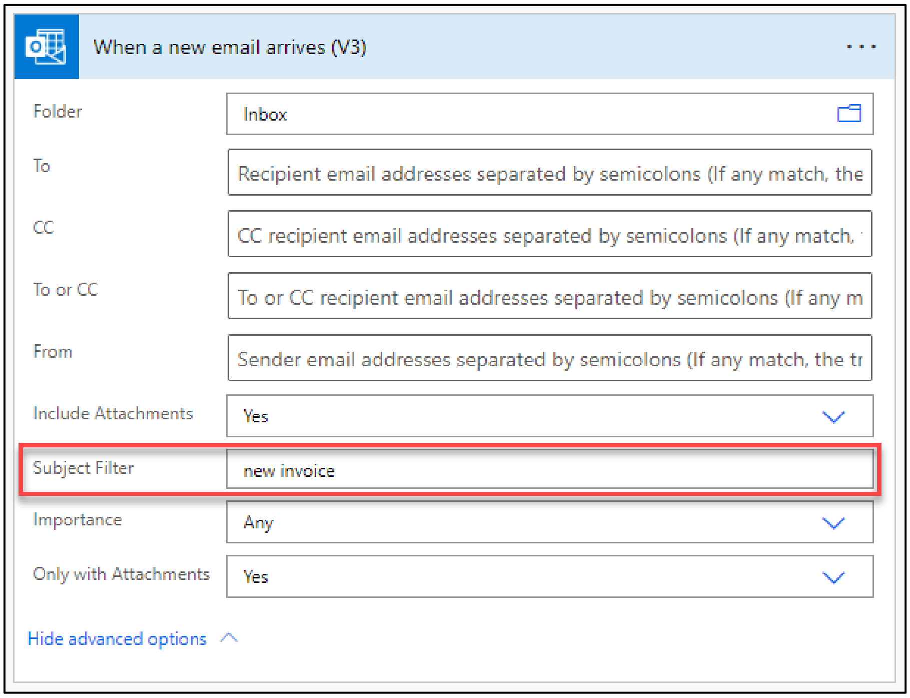
Note: You can check your connection by selecting the ellipses (...) in the top right corner of the box.



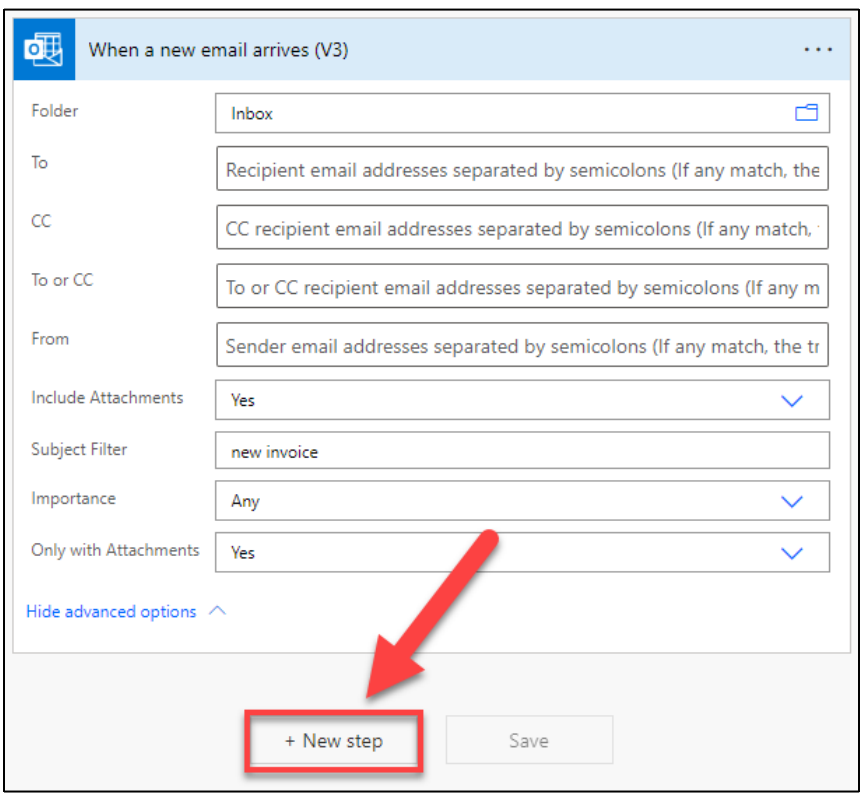
9. Select **Yes** for **Include Attachments** and **Yes** for **Has Attachment** (yours may read **Only with Attachments**; depends on the version of the Outlook connector)



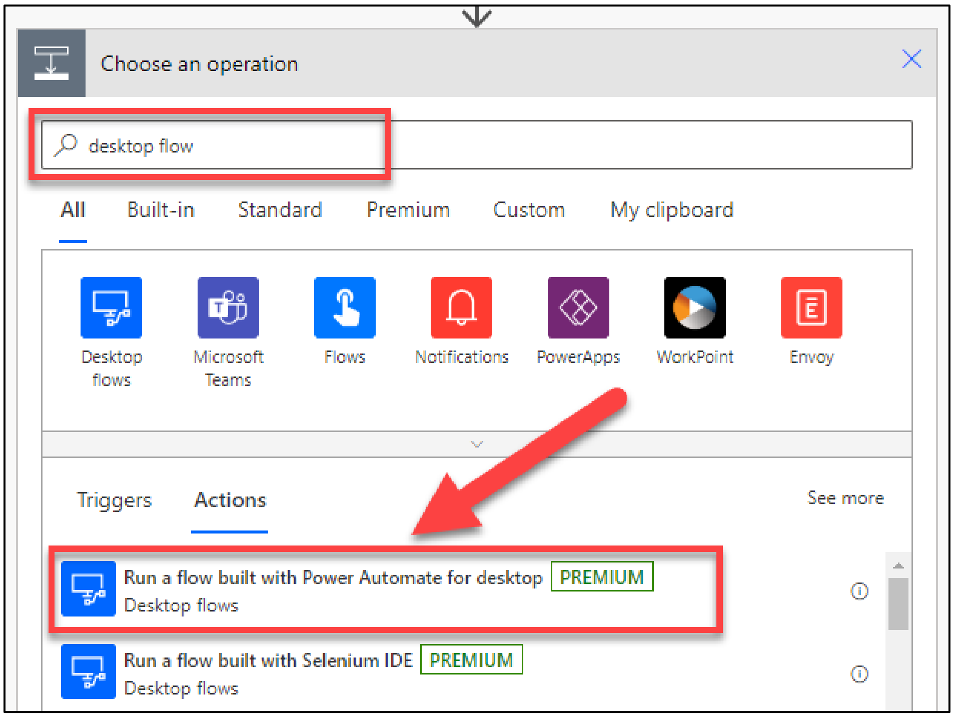
10. Type **new invoice** in the **Subject Filter** field.



11. Then, select **+New step**.



12. Search for **Desktop flow** in the search bar and select **Run a flow built with Power Automate for desktop (Premium)**.

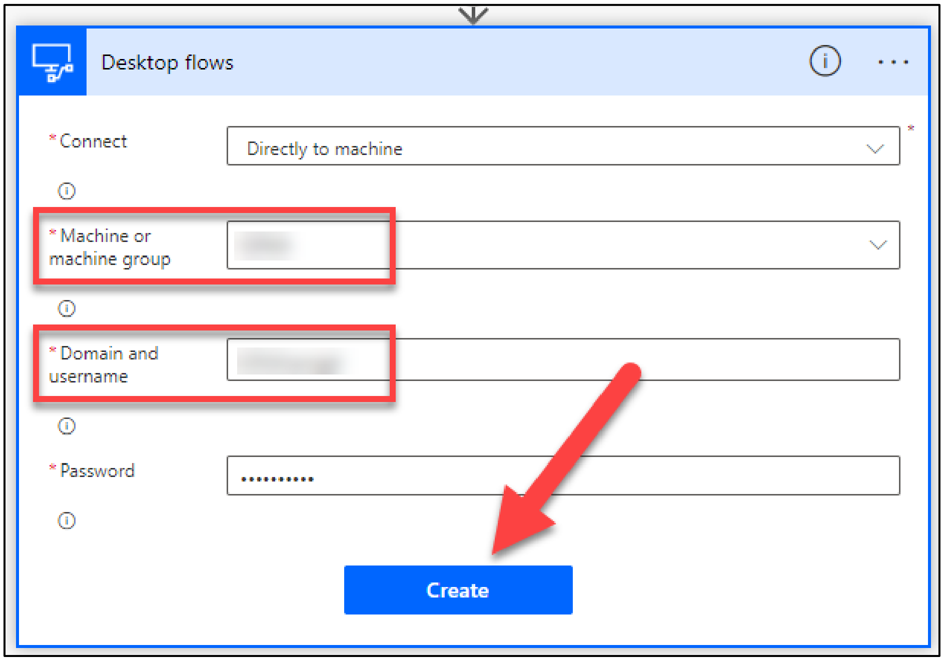


Note: You may receive a prompt to create a new connection because of building an API flow inside of a solution. Please use the same information that you used when creating connections in previous labs

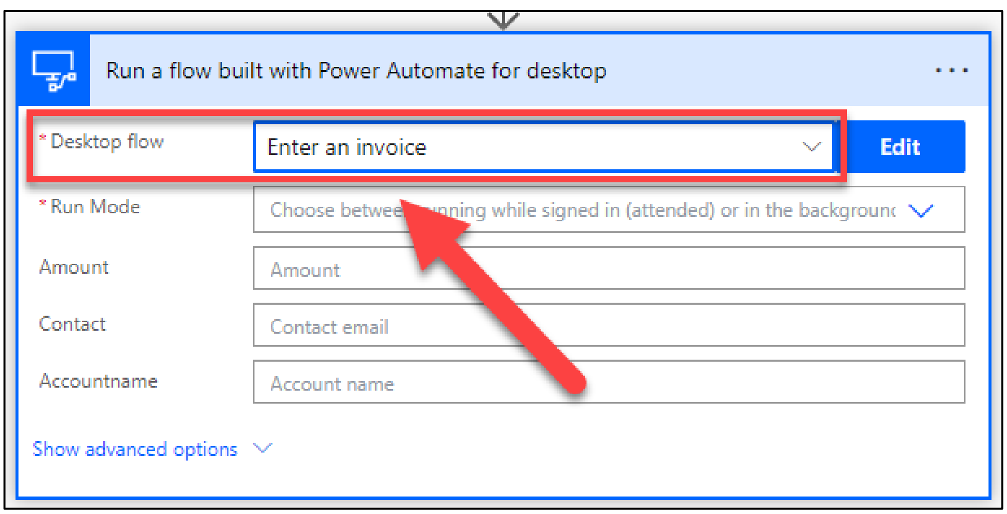
13. Select the machine connection you have created already.

Important: If you do not see any existing connection but are asked to create a new connection, please refer to steps described in Lab 4 for instructions how to do it.

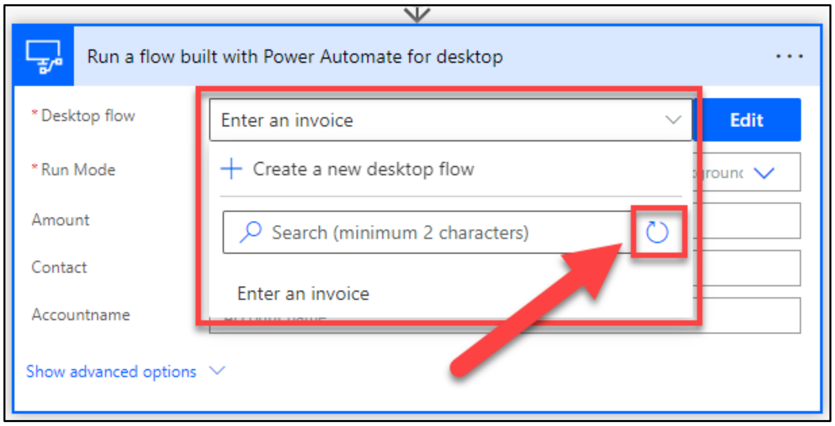
14. Provide your desktop **domain/username** and **password**, and then select **Create**.



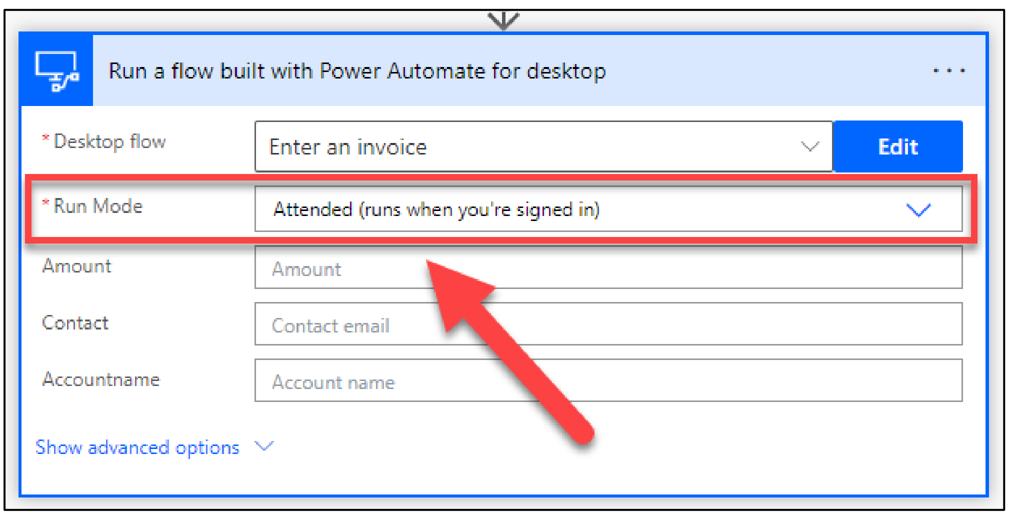
15. After you have selected or created the desktop flow connection, within the **Desktop flow** dropdown list, find and select the desktop flow that we have created earlier: **Enter an invoice**.



Note: If you did not see the name of the newly created desktop flows in the dropdown list, you can select the **refresh** icon next to the search textbox to refresh the list.

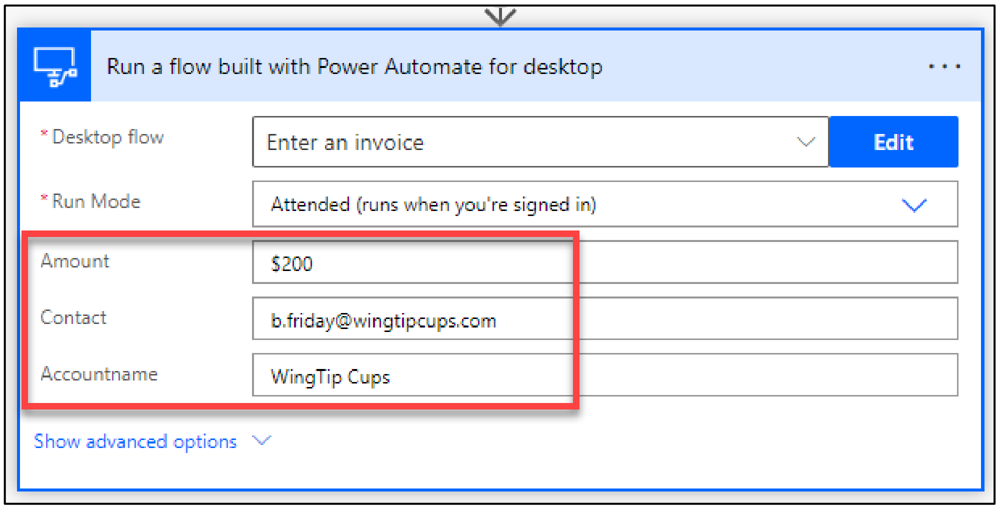


16. Under **Run Mode**, select **Attended – Runs when you're signed in**.

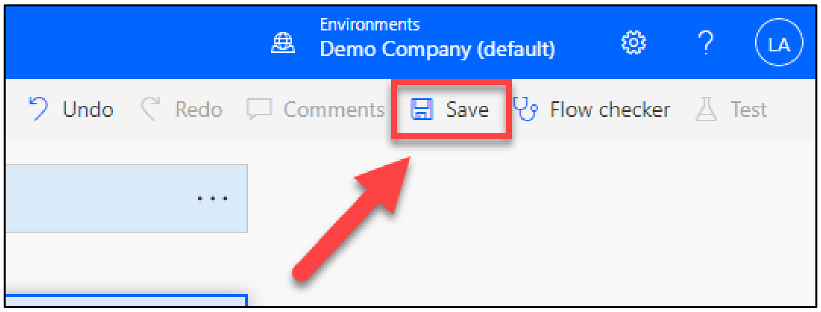


17. Fill in the Amount, Contact and Accountname text boxes using the values below: (**Note:** we will switch these later in future labs to use Dynamics input values. But for now, we will use static values)

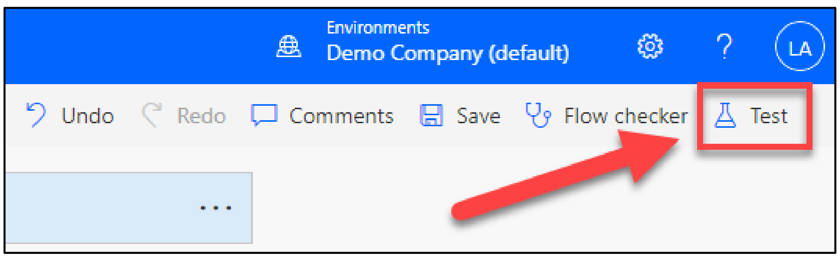
- Amount: $200
- Contact: b.friday@wingtipcups.com
- Account name: WingTip Cups



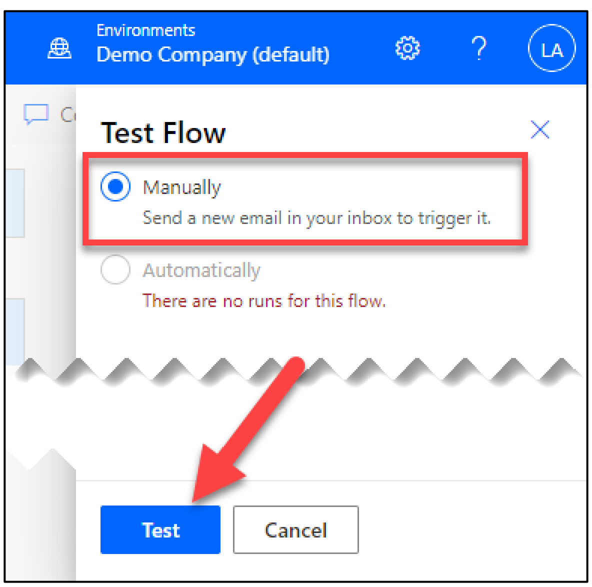
18. **Save** the flow by selecting the **Save** button in the top right corner of the screen.



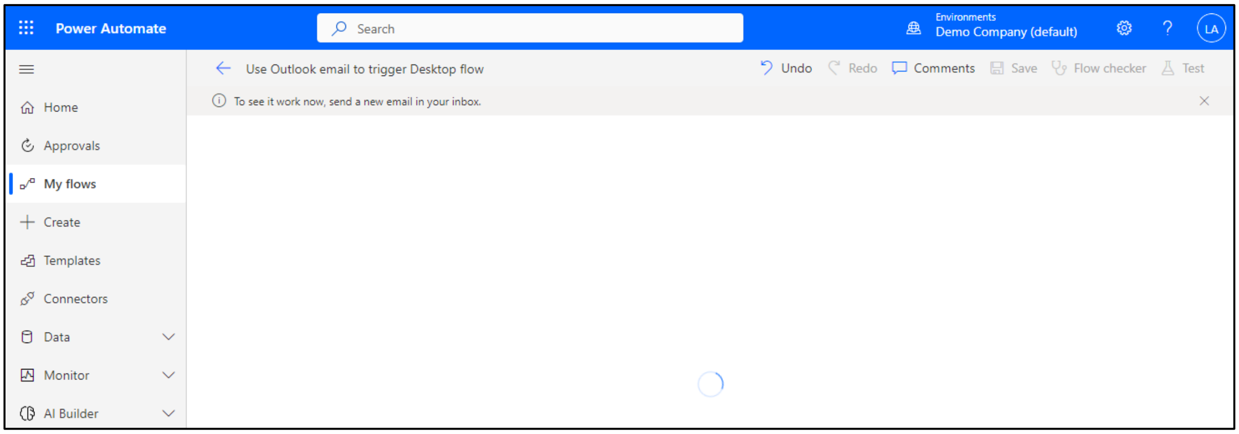
19. **Test** the flow by selecting the **Test** button in the top right corner of the screen.



20. Then, from the Test Flow pane, choose the **Manually** option and then select **Test**.



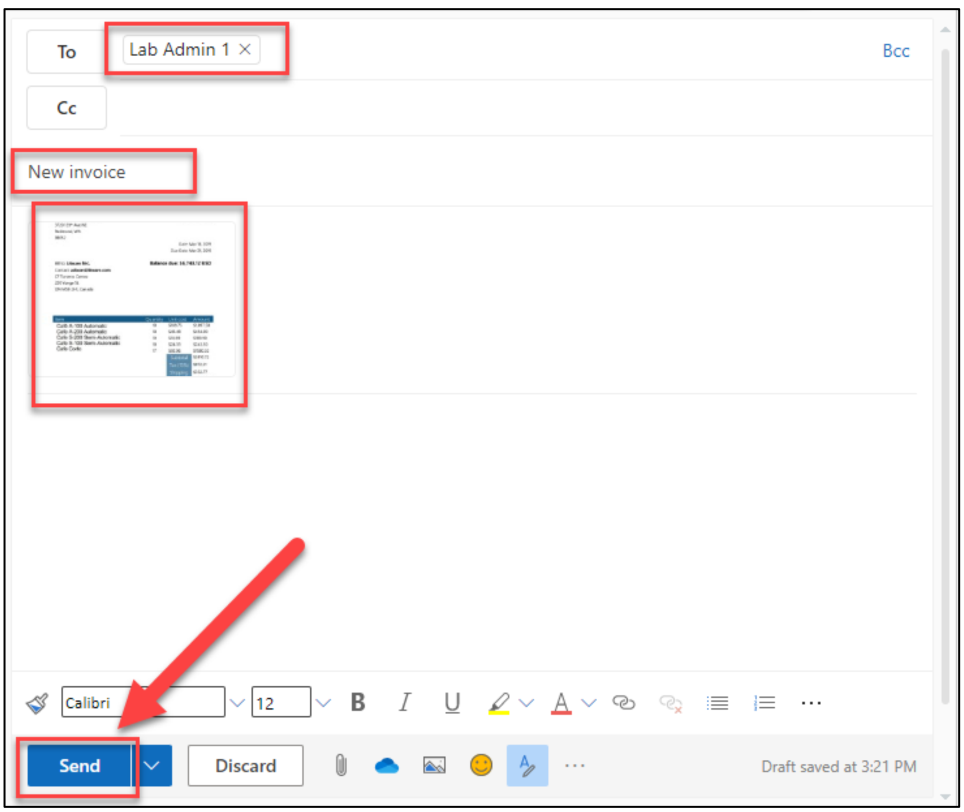
21. You will see a flow run history page which is empty. Since this flow has a trigger, the flow will run automatically if that trigger condition happens (when a new email arrives).



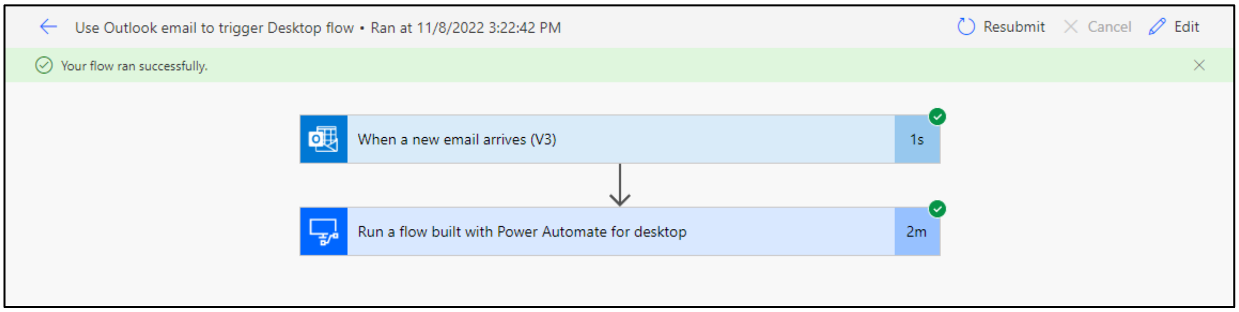
22. Now open an **email** app to draft an email to send to the inbox of the account that your trigger action is monitoring (which is the account you used to sign in when creating the trigger connection).

23. In the **email body**, add the **newinvoice.jpg file** as an attachment (you can find this jpg file under the **lab data package** folder).

24. Enter **New invoice** in the **Add a subject** line. Then, select **Send** to test out this flow.



25. Once the email is received by the inbox that your flow trigger is monitoring, it will trigger the flow run automatically. Navigate back to the flow run history page. There you will see that your flow should run successfully and launch the desktop flow on your computer as well.



Note: Sometimes, in the test account tenant, emails may be blocked due to spam concerns. If you receive an error sending an email, please try to send it from another account and be sure to include the attachment and correct Subject line.

Check your knowledge

Lab 5

3 mins

1. Using Solutions to manage your flows is a best practice, but what is the reason we must use solution in this lab? Is it because the AI builder model in the next lab will only be supported within solution-based flow?
   A. True
   B. False

2. How do you check your Outlook connection after signing into your outlook account in this lab to ensure you are using the right account?
   A. Open your Outlook manually
   B. Click Show advanced options
   C. Click the outlook icon in cloud flow
   D. Click the ellipsis icon (...) on the top right corner of the box

Answer Key

1. Using Solutions to manage your flows is a best practice, but what is the reason we must use solution in this lab? Is it because the AI builder model in the next lab will only be supported within solution-based flow?

   A. True
   B. False

   Answer: **A**. True, calling an AI Builder model requires the use of a solution-aware flow.

2. How do you check your Outlook connection after signing into your outlook account in this lab to ensure you are using the right account?

   A. Open your Outlook manually
   B. Click Show advanced options
   C. Click the outlook icon in cloud flow
   D. Click the ellipsis icon (…) on the top right corner of the box

   Answer: **D**. Select the ellipsis icon (…) on the top right corner of the box. Here you will see the email address that was used to create the connection.