

Lab 7. Document generation with the Word Connector

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Learning objective: create a Flow that will generate an invoice (in PDF) based on a Word template and based on data stored in an Excel document.

Duration: 30 minutes

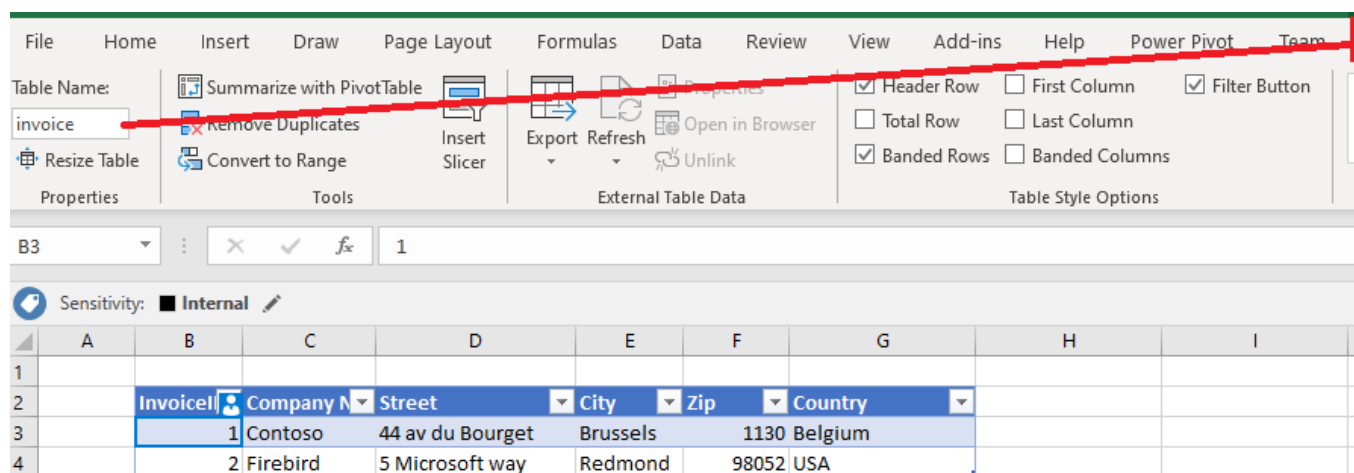
Scenario: Excel files containing invoice data are stored in OneDrive for Business. A Flow will read these data, it will parse the data, and it will generate an invoice based on a word document template. The invoice will be transformed into a PDF file.

Prerequisites: The Word Connector is a Premium connector. You need to test this lab with a trial premium subscription.

When using the Word Connector, the designer will ask you to start a premium trial.

Tasks:

1. Upload the file **invoice.xlsx** provided by the trainer to the Documents folder of your OneDrive for Business
2. Look at this file: there are 2 tables:
 - a. The table **invoice** consists of the invoice headers
 - b. The table **invoicelines** consists of the invoice lines
3. Each table has a name that we will reference from our Flow; to find out the table name, open the file in Excel desktop, click the table and select the menu Design as illustrated in the next picture:



Invoice#	Company Name	Street	City	Zip	Country
1	Contoso	44 av du Bourget	Brussels	1130	Belgium
2	Firebird	5 Microsoft way	Redmond	98052	USA

4. Each invoice can have several lines.
5. Upload the file **Invoice Template start.docx** provided by the trainer into the Documents folder of your OneDrive for Business and take a look at this file:

(header)

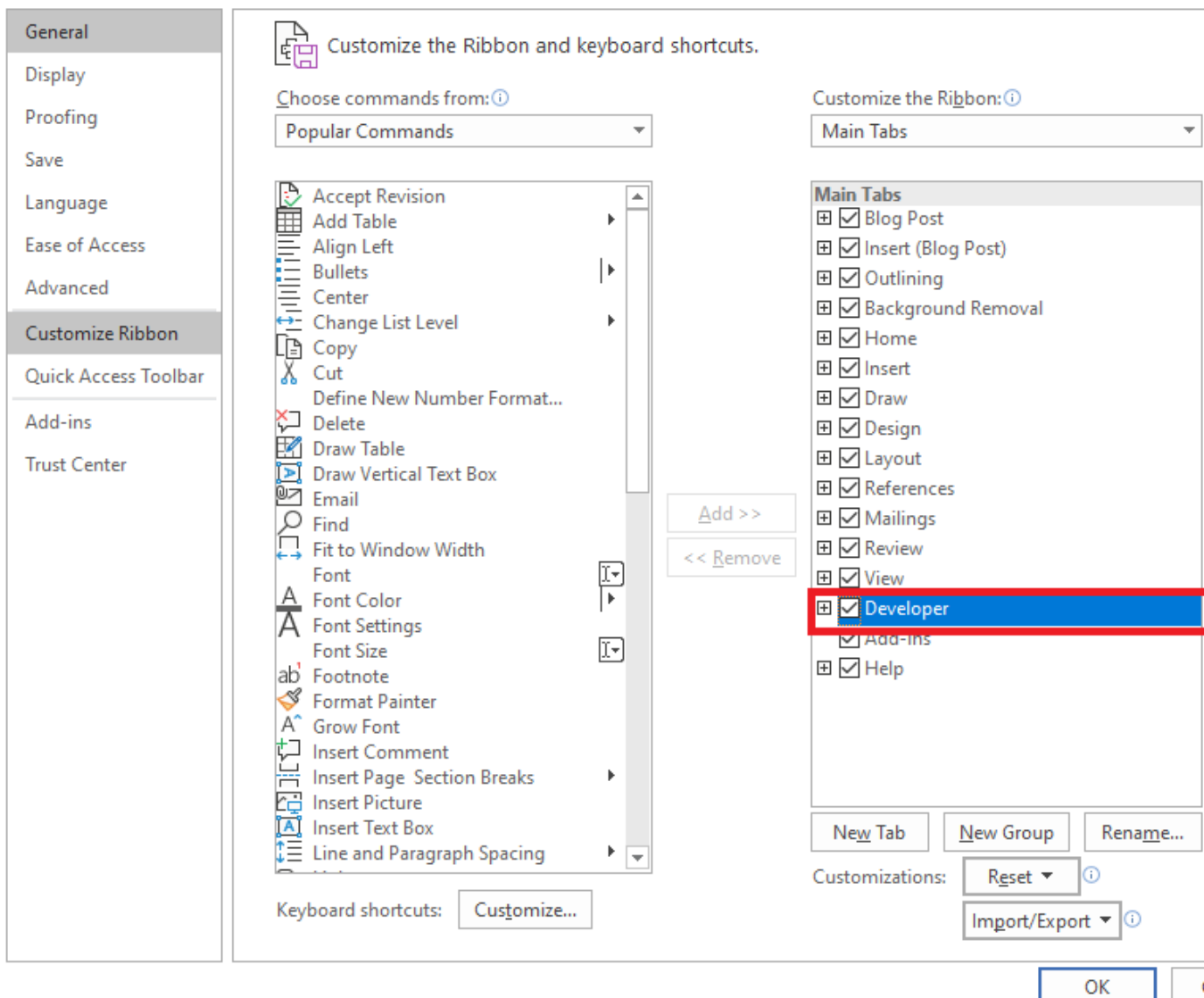
Doctor Flow 133 av <u>Dieweg</u> 1180 Uccle <u>Belgique</u>		INVOICE	
BILL TO Name Company Name Street address City, Postal Code		INVOICE#	

Description	Amount

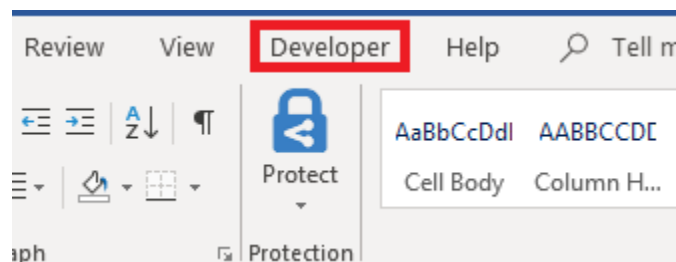
(lines)

The section "header" and "lines" are 2 different tables. The lines section is a table with one row for the header and one row for the data.

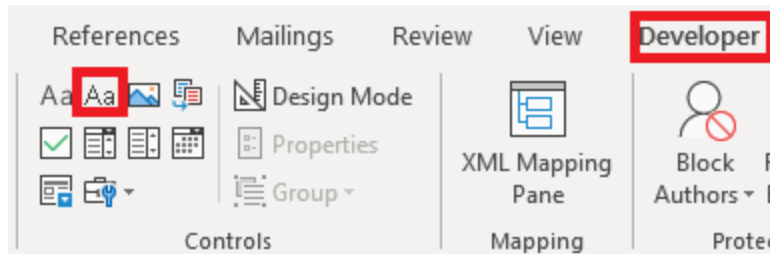
- Go to the Word options, select Customize Ribbon, select **Developer**, and click OK.



This will display the **Developer** tab in Word:



7. You will customize the word template, next to each field of the template, we will add a **Word plain text content** control, and we will use the properties button to name them accordingly.



8. Add a control next to the following fields: **Company Name**, **Street address**, **City** (add 2 controls here, one for the city, one for the zip code) and one next to **invoice#**; with the properties button, name the controls **company**, **street**, **zip**, **invoiceid** as illustrated below:

<p>Doctor Flow 133 av <u>Dieweg</u> 1180 Uccle <u>Belgique</u></p>	<p>INVOICE</p>	
<p>BILL TO</p> <p>Company Name: <input type="text" value="company"/> Click or tap here to enter text.)</p> <p>Street address: <input type="text" value="street"/> Click or tap here to enter text.)</p> <p>City: <input type="text" value="city"/> Click or tap here to enter text.) , <input type="text" value="zip"/> Click or tap here to enter text.)</p>	<p>INVOICE#</p>	<p><input type="text" value="invoiceid"/> Click or tap here to enter text. <input type="text" value="invoiceid"/></p>

9. You will focus now on the invoice lines; select the second row of the table (the one with the empty data, not the row with the header); select the whole row (including the 2 columns) and add a **Repeating Section Content Control**:

References Mailings Review View **Developer** Help Design Layout Tell me what you want to do

Aa Aa Design Mode

Properties

Group

Controls XML Mapping Pane Mapping Block Authors Restrict Editing Document Template Templates

Repeating Section Content Control
Insert a content control that contains other controls and repeats the contents of the control as needed.

<p><u>Doctor Flow</u> 133 av <u>Dieweg</u> 1180 Uccle <u>Belgique</u></p>	<p>INVOICE</p>	
<p>BILL TO</p> <p>Company Name: Click or tap here to enter text. Street address: Click or tap here to enter text. City: Click or tap here to enter text., Click or tap here to enter text.</p>	<p>INVOICE#</p>	<p>Click or tap here to enter text.</p>





Description	Amount


10. In this repeating section, content control, add 2 Plain text content controls and named them **Product** and **Amount**:

Doctor Flow 133 av <u>Dieweg</u> 1180 Uccle <u>Belgique</u>		INVOICE	
BILL TO Company Name: <input type="text" value="company"/> (Click or tap here to enter text.) Street address: <input type="text" value="street"/> (Click or tap here to enter text.) City: <input type="text" value="city"/> (Click or tap here to enter text.) , <input type="text" value="zip"/> (Click or tap here to enter text.)		INVOICE#	<input type="text" value="invoiceid"/> (Click or tap here to enter text.) <input type="text" value="invoiceid"/>

Description	Amount
<input type="text" value="lineitems"/> <input type="text" value="Product"/> (Click or tap here to enter text.) <input type="text" value="Product"/>	<input type="text" value="Amount"/> (Click or tap here to enter text.) <input type="text" value="Amount"/> <input type="text" value="lineitems"/>

11. Just after the repeating section add a **Picture content control** that will display the manager signature. Name this control **managersignature**.
12. Eventually, the template should look like this:

Doctor Flow 133 av <u>Dieweg</u> 1180 Uccle <u>Belgique</u>	INVOICE	
BILL TO Company Name: <input type="text" value="company"/> Click or tap here to enter text.  Street address: <input type="text" value="street"/> Click or tap here to enter text.  City: <input type="text" value="city"/> Click or tap here to enter text.  , <input type="text" value="zip"/> Click or tap here to enter text. 	INVOICE#	<input type="text" value="invoiceid"/> Click or tap here to enter text. <input type="text" value="invoiceid"/>

Description	Amount
<input type="text" value="lineitems"/> <input type="text" value="Product"/> Click or tap here to enter text. <input type="text" value="Product"/>	<input type="text" value="Amount"/> Click or tap here to enter text. <input type="text" value="Amount"/> <input type="text" value="lineitems"/>
<div> <div>managersignature </div> <div> <div></div> <div>managersignature</div> <div>managersignature</div> </div> </div>	

13. Rename the file to **Invoice template.docx**
14. Let's create Flow that starts from a button.
15. Add an action **Excel Online (Business)- List rows present in a table** , rename it as **Find Invoices** and retrieve the **invoice table** of your **invoice.xlsx** documents:

Manually trigger a flow

Find Invoices

Location*
OneDrive for Business

Document Library*
OneDrive

* File
/Flow Workshop/Invoice.xlsx

Table*
invoice

Show advanced options

16. For each invoice, you will find the corresponding invoice lines: add the **Apply to each** action where you will add another **Excel Online (Business)- List rows present in a table** (rename it **Find InvoiceLines**) that will retrieve the invoicelines table:

Apply to each Invoice

Select an output from previous steps*

value

Find InvoiceLines

Location*
OneDrive for Business

Document Library*
OneDrive

* File
/Flow Workshop/Invoice.xlsx

Table*
invoicelines

Show advanced options

In the Excel for business action

17. You need to filter the retrieved lines. Click the **Show advanced options** and in the **Filter Query** field, type **Invoice eq ''**

↺ Apply to each Invoice ...

Select an output from previous steps *

value X

Find InvoiceLines

Location *

OneDrive for Business

Document Library *

OneDrive

* File

/Flow Workshop/Invoice.xlsx

Table *

invoicelines

Filter Query

Invoice eq ''

Order By

An ODATA orderBy query for specifying the order of entries.

Top Count

Total number of entries to retrieve (default = all).

Skip Count

The number of entries to skip (default = 0).

Select Query

Comma-separated list of columns to retrieve (first 500 by default).

[Hide advanced options](#)

18. Move the cursor between the '' and in the expression panel, type **item()?['InvoiceID']** then click ok:

Expression

List of functions ✕

Search content from previous steps

Get file content using path

File content
Sample data not available

Find Invoices

InvoiceID
Sample data not available

Invoice eq

Add an expression

Order By

An ODATA orderBy query for specifying the order of entries.

Top Count

Total number of entries to retrieve (default = all).

Skip Count

The number of entries to skip (default = 0).

Select Query

Comma-separated list of columns to retrieve (first 500 by default).


Hide advanced options

^



Expression



List of functions 



items('Apply_to_each_Invoice')?['InvoiceID']

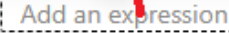
 Search content from previous steps

 Get file content using path 

 File content
Sample data not available 

 Find Invoices 

 InvoiceID
Sample data not available 

Invoice eq 

Order By

An ODATA orderBy query for specifying the order of entries.

Top Count

Total number of entries to retrieve (default = all).

Skip Count

The number of entries to skip (default = 0).

Select Query

Comma-separated list of columns to retrieve (first 500 by default).

[Hide advanced options](#) 



Apply to each Invoice



Select an output from previous steps *

value X



Find InvoiceLines



Location *

OneDrive for Business



Document Library *

OneDrive



* File

/Flow Workshop/Invoice.xlsx



Table *

invoicelines



Filter Query



Invoice eq 'fx items(...)' X

Order By

An ODATA orderBy query for specifying the order of entries.

Top Count

Total number of entries to retrieve (default = all).

Skip Count

The number of entries to skip (default = 0).

Select Query

Comma-separated list of columns to retrieve (first 500 by default).

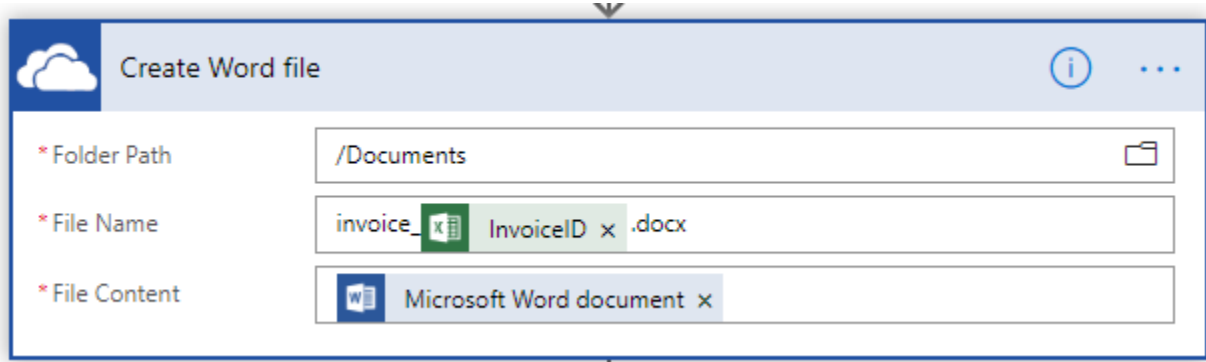
[Hide advanced options](#) ^

19. Add an action **Populate a Microsoft Word template**, and you will notice that the Word content controls show up as fields in this connector; fill in the field with the Excel values:

The screenshot shows a workflow connector for the 'Populate a Microsoft Word template' action. At the top, a grey bar contains a refresh icon and the text 'Apply to each Invoice'. Below this, a section titled 'Select an output from previous steps*' contains a field with an Excel icon and the text 'value'. An arrow points from this field to the 'Populate a Microsoft Word template' action, which is highlighted in blue. The action has several fields: 'Location*' (a dropdown menu with 'OneDrive for Business' selected), 'Document Library*' (a dropdown menu with 'OneDrive' selected), '* File' (a text field with '/Flow Workshop/Invoice Template.docx' and a folder icon), 'managersignature' (a text field with a formula icon and 'fx'), 'Invoiceid' (a field with an Excel icon and 'InvoiceID'), 'company' (a field with an Excel icon and 'Company Name'), 'lineitems' (a dashed box containing a text field and a table icon), 'street' (a field with an Excel icon and 'Street'), 'city' (a field with an Excel icon and 'City'), and 'zip' (a field with an Excel icon and 'Zip').

20. You still have to generate a file in OneDrive for Business with the content of the previous action output content: add a **OneDrive for Business Create file** action and rename it Create Word file.

21. Fill in the File Content from with the output of the previous action and dynamically generate the file name:

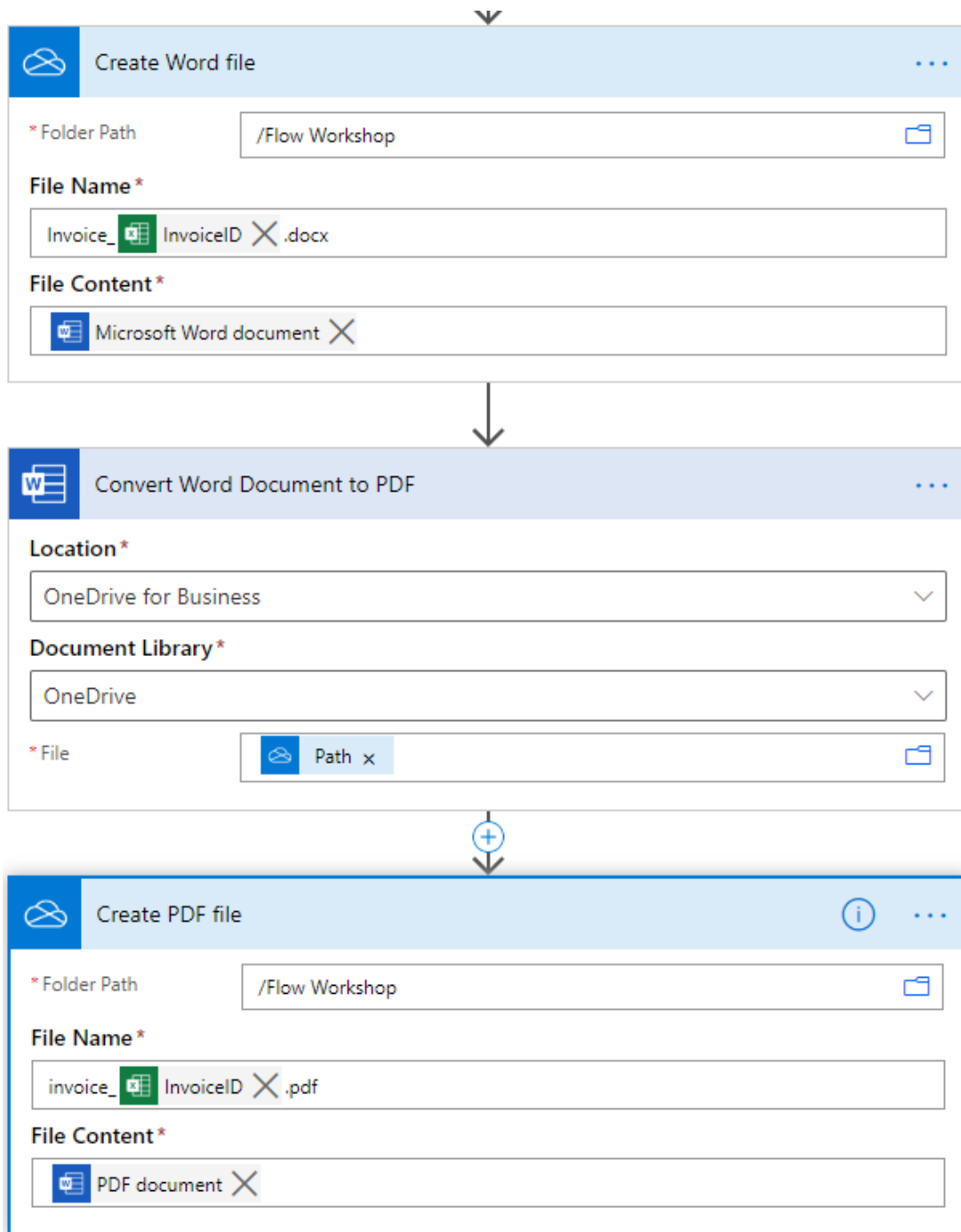


The screenshot shows the 'Create Word file' action configuration window. It has a title bar with a cloud icon, the text 'Create Word file', an information icon, and a menu icon. Below the title bar, there are three input fields:

- * Folder Path:** A text box containing '/Documents' with a folder icon on the right.
- * File Name:** A text box containing 'invoice_' followed by a green connector icon, 'InvoiceID' followed by a blue connector icon, and '.docx'.
- * File Content:** A text box containing a blue Word icon followed by 'Microsoft Word document' and a blue connector icon.

22. Add an action Convert Word Document to PDF and grab the path of the generated file

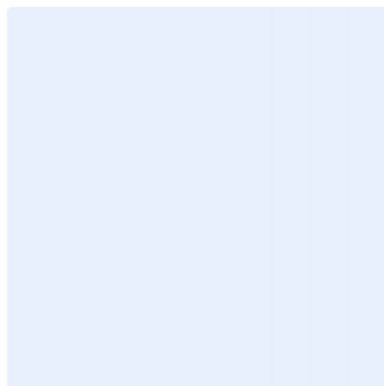
23. Add a **OneDrive for Business Create file action** to create the pdf file and pass the body of the previous action. The next 2 actions should look like this:



24. Run the Flow and check the generated PDF files. The first file should look like this:

Doctor Flow 133 av Dieweg 1180 Uccle Belgique	INVOICE	
BILL TO Company Name: Contoso Street address: 44 av du Bourget City: Brussels , 1130	INVOICE#	1

Description	Amount
Click or tap here to enter text.	Click or tap here to enter text.



25. You will now update the Flow to implement the line items. Edit the Flow and define an array variable called **invoiceLines** and initialize it as an empty array:

Manually trigger a flow

Initialize variable invoiceLines

Name*

invoiceLines

Type*

Array

Value

[]

26. Add a Set variable action at the start of Apply to each to clean-up this variable again:

Apply to each Invoice

Select an output from previous steps*

value

Set variable invoiceLines to empty

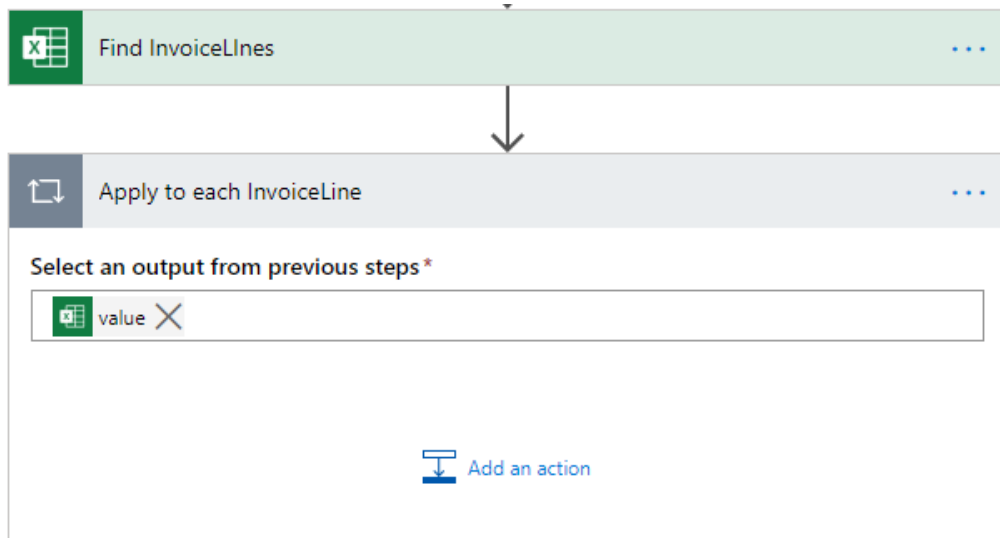
Name

invoiceLines

Value*

[]

27. After the Find **InvoiceLines** action, **add an Apply to each Invoice** to go through every invoice lines:




28. In this Apply to each, you will create a JSON array containing the **lineitems** information; add an **Append to array variable** action:

This screenshot shows the configuration for the 'Append to array variable invoiceLines' action, which is highlighted with a purple border. The action has a purple header bar with a curly brace icon. Below the header, there is a dropdown menu for '* Name' with 'invoiceLines' selected. Under the 'Value*' section, there is a text area containing a JSON object:

```
{
  "Product": Product,
  "Amount": Amount
}
```

. The 'Product' and 'Amount' values are represented by green table icons with their respective labels and a close button.

29. You will now update the **Populate a Microsoft Word template** action with this array. Select this action and click on the **Switch to input entire array** button:



Populate a Microsoft Word template

...

Location *

OneDrive for Business

Document Library *


OneDrive

* File


/Flow Workshop/Invoice Template.docx

managersignature


Invoiceid

 InvoiceID X


company

 Company Name X


lineitems




street

 Street X

city

 City X

zip

 Zip X

30. Store your array in this area:

Populate a Microsoft Word template

Location*
OneDrive for Business

Document Library*
OneDrive

* File /Flow Workshop/Invoice Template.docx

managersignature

Invoiceid
InvoiceID

company
Company Name

lineitems
invoiceLines

street
Street

city
City

zip
Zip

Add dynamic content used in this flow.

Dynamic content

Search dynamic content

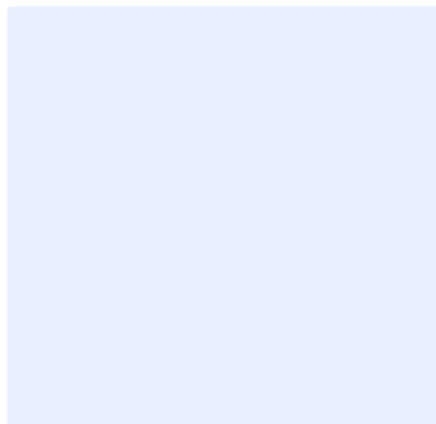
Variables

invoiceLines

31. Run the Flow and check the generated documents. You should now see the invoice line items:

Doctor Flow 133 av Dieweg 1180 Uccle Belgique	INVOICE	
BILL TO Company Name: Contoso Street address: 44 av du Bourget City: Brussels , 1130	INVOICE#	1

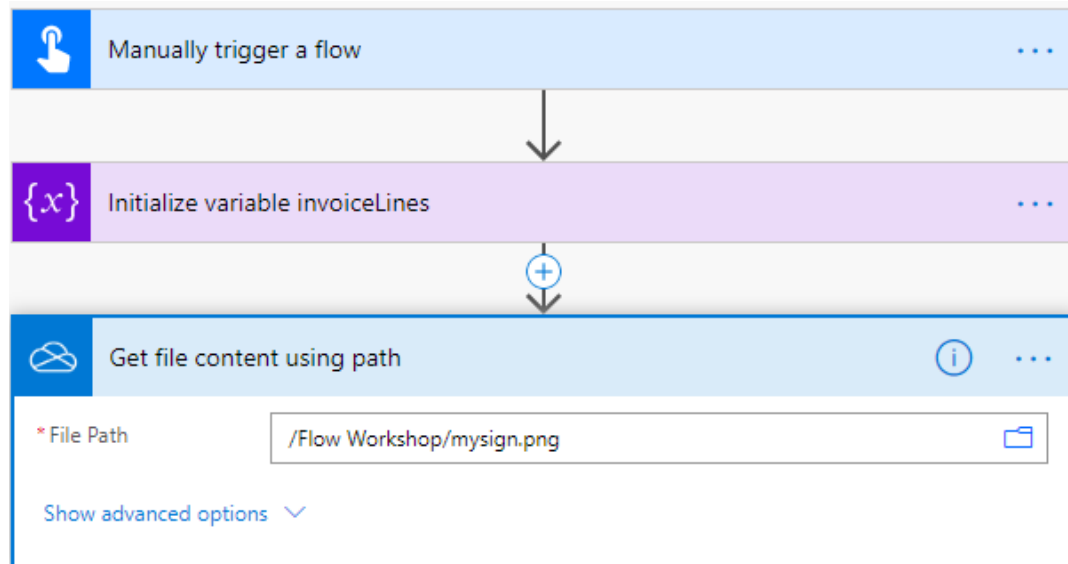
Description	Amount
Internal training PowerApps	5
Internal training Flow	4



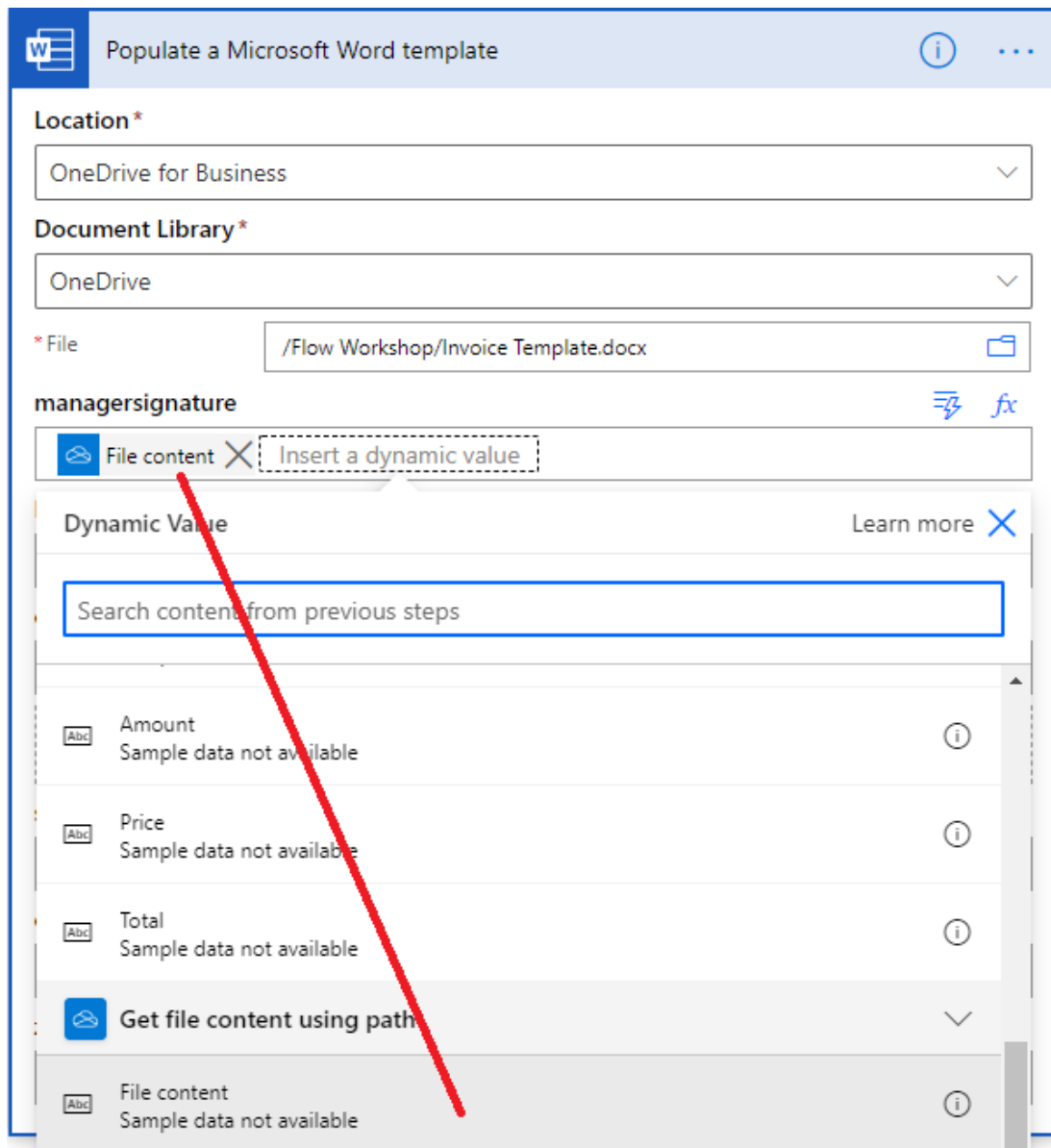
32. We will now display the signature portion of the document. Create a jpeg file with your name and signature, and upload it the Documents folder of your OneDrive for business. For instance, our signature looks like this:

Dr Flow

33. In the beginning section of the Flow, add a **OneDrive for business** action **Get file content using path** and pass your signature file path:



34. Edit the existing action **Populate a Microsoft Word template** action and in the **managersignature** field, pass your signature content:



35. Test your Flow and check one the generated document, the signature should now be visible:

Doctor Flow 133 av Dieweg 1180 Uccle Belgique	INVOICE	
BILL TO Company Name: Contoso Street address:44 av du Bourget City: Brussels , 1130	INVOICE#	1

Description	Amount
Internal training PowerApps	5
Internal training Flow	4

