

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)

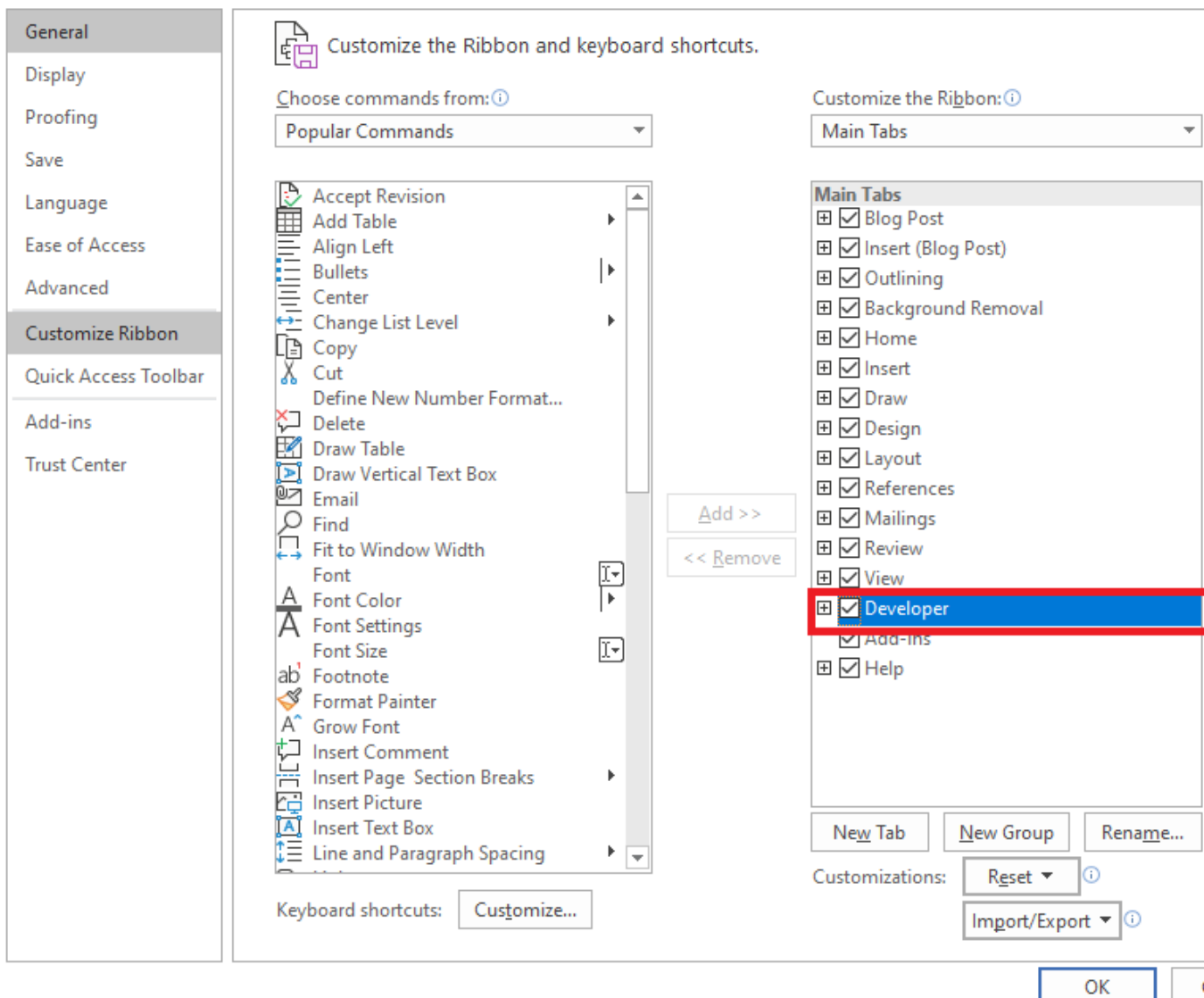
Doctor Flow 133 av <u>Dieweg</u> 1180 Uccle <u>Belgique</u>	INVOICE	
BILL TO Name Company Name Street address City, Postal Code	INVOICE#	

Description	Amount

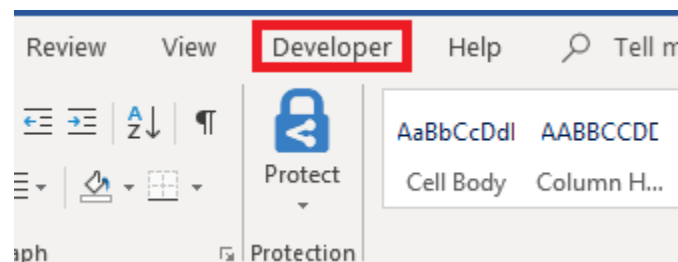
(lines)

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.

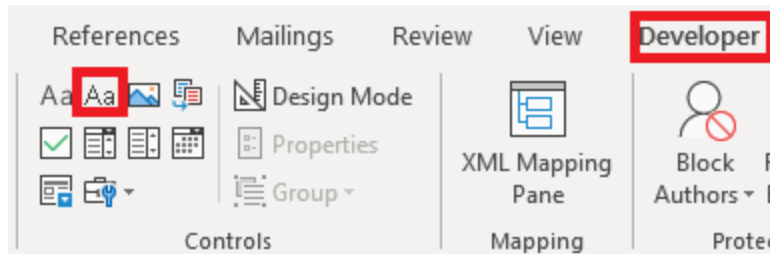
6. Go to the Word options, select Customize Ribbon, select **Developer**, and click OK.



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**:

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>	

- Rename the file to **Invoice template.docx**
- Let's create Flow that starts from a button.
- 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 

 Find InvoiceLines i ...

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']

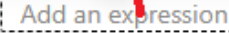
 Search content from previous steps

 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](#) ^

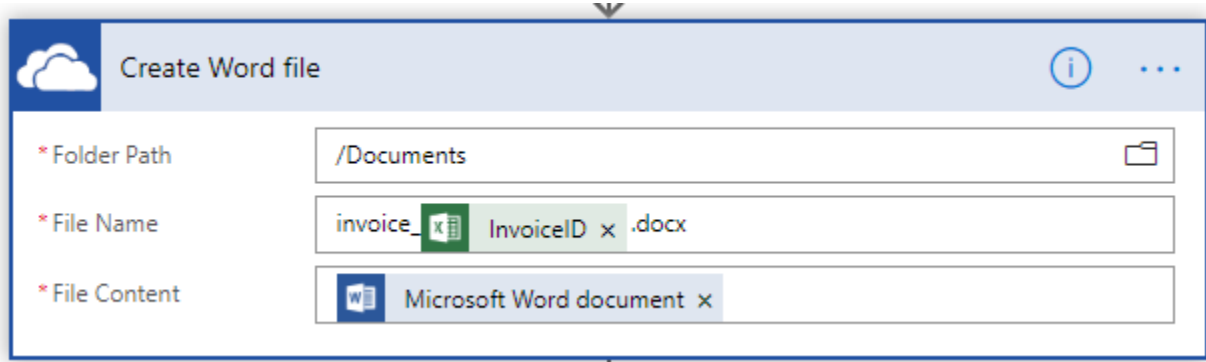
19. Add an action **Populate a Microsoft Word template**, and you will notice that the Word content controls show up as fields in this connector; fill in the field with the Excel values:

The screenshot shows a workflow connector titled 'Apply to each Invoice'. Below the connector header, there is a section 'Select an output from previous steps *' with a dropdown menu showing 'value'. Below this, there is a green box labeled 'Find InvoiceLines'. An arrow points down to a blue box labeled 'Populate a Microsoft Word template'. This box contains several fields for mapping data from the previous step to a Word template:

- Location ***: A dropdown menu showing 'OneDrive for Business'.
- Document Library ***: A dropdown menu showing 'OneDrive'.
- * File**: A text field showing '/Flow Workshop/Invoice Template.docx'.
- managersignature**: A text field with a formula icon and 'fx'.
- Invoiceid**: A text field with a dropdown menu showing 'InvoiceID'.
- company**: A text field with a dropdown menu showing 'Company Name'.
- lineitems**: A text field with a table icon.
- street**: A text field with a dropdown menu showing 'Street'.
- city**: A text field with a dropdown menu showing 'City'.
- zip**: A text field with a dropdown menu showing '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:



Create Word file

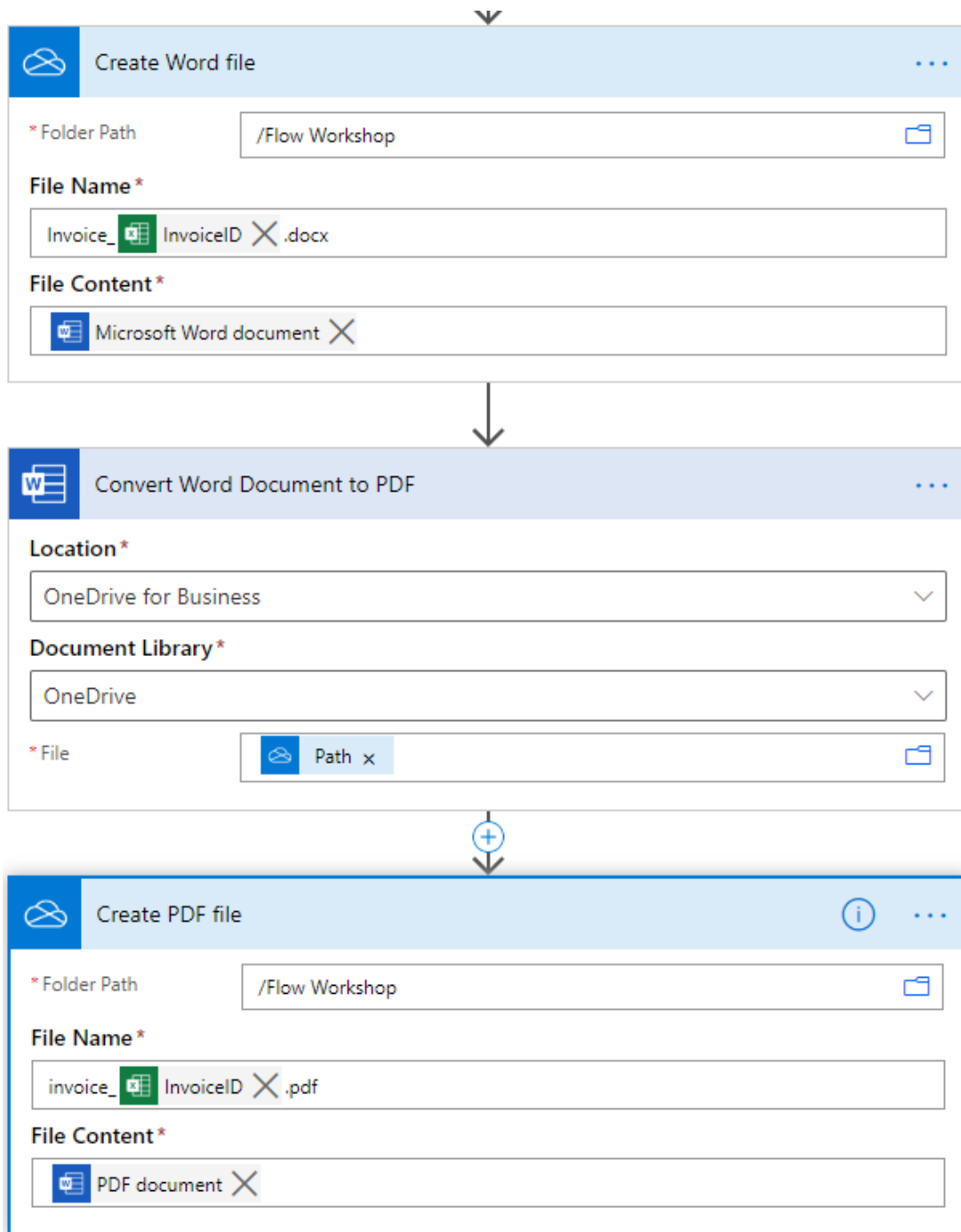
* Folder Path: /Documents

* File Name: invoice_  InvoiceID  .docx

* File Content:  Microsoft Word document 

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

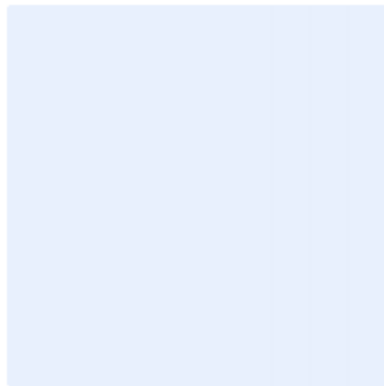
23. Add a **OneDrive for Business Create file action** to create the pdf file and pass the body of the previous action. The next 2 actions should look like this:



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

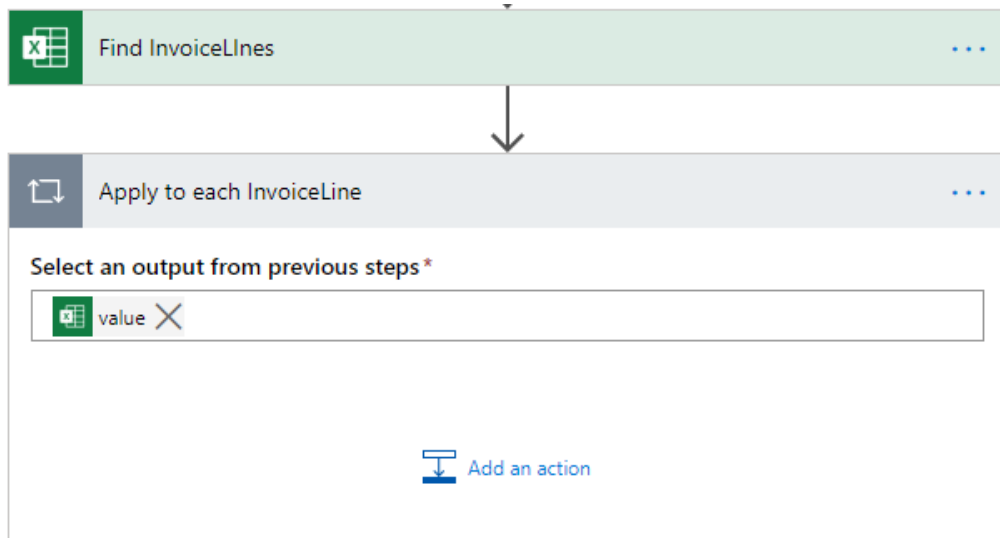
Name

invoiceLines

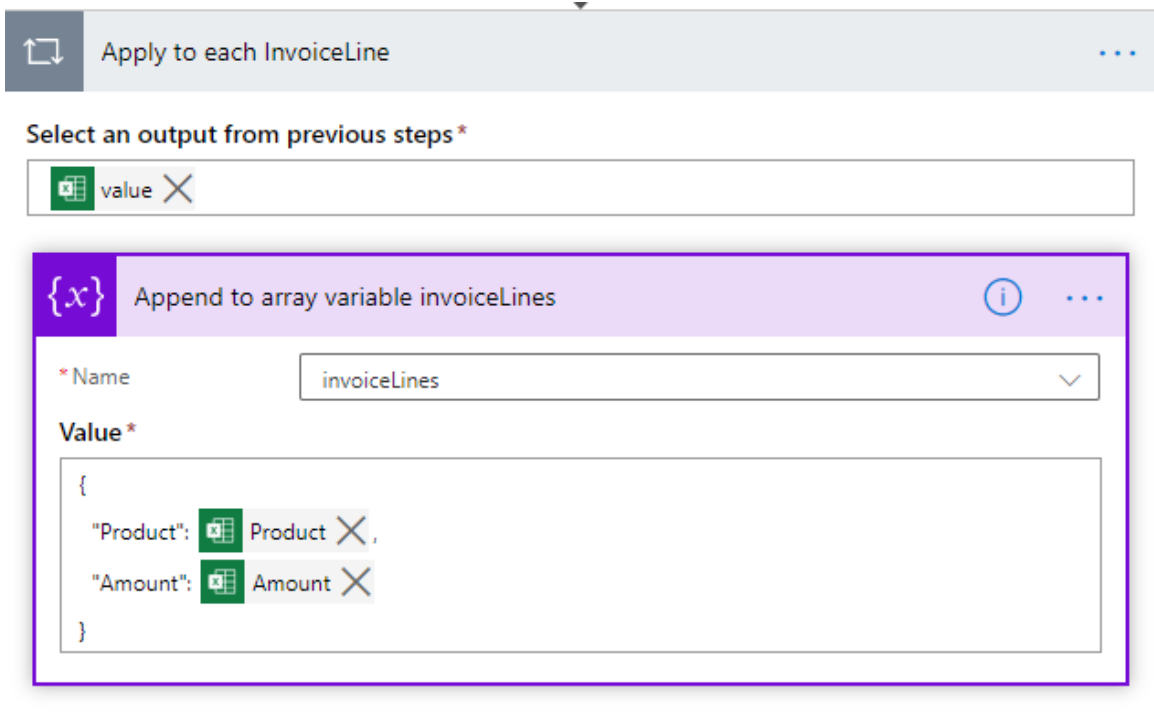
Value*

[]


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:



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

company

lineitems
 [Add dynamic content](#)

street

city

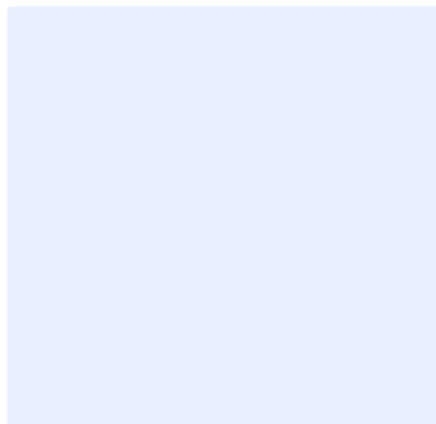
zip

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

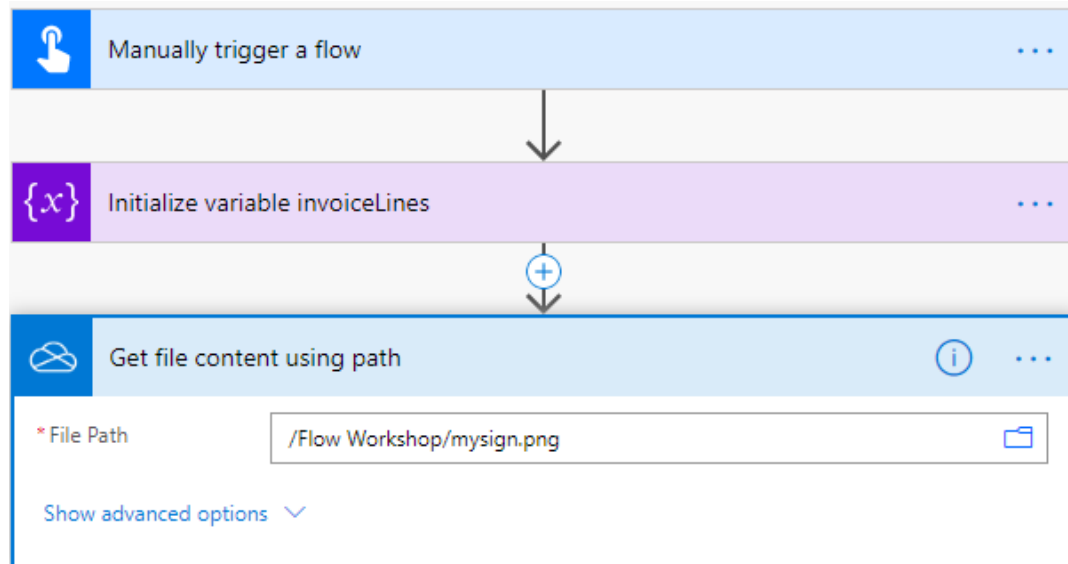
Description	Amount
Internal training PowerApps	5
Internal training Flow	4



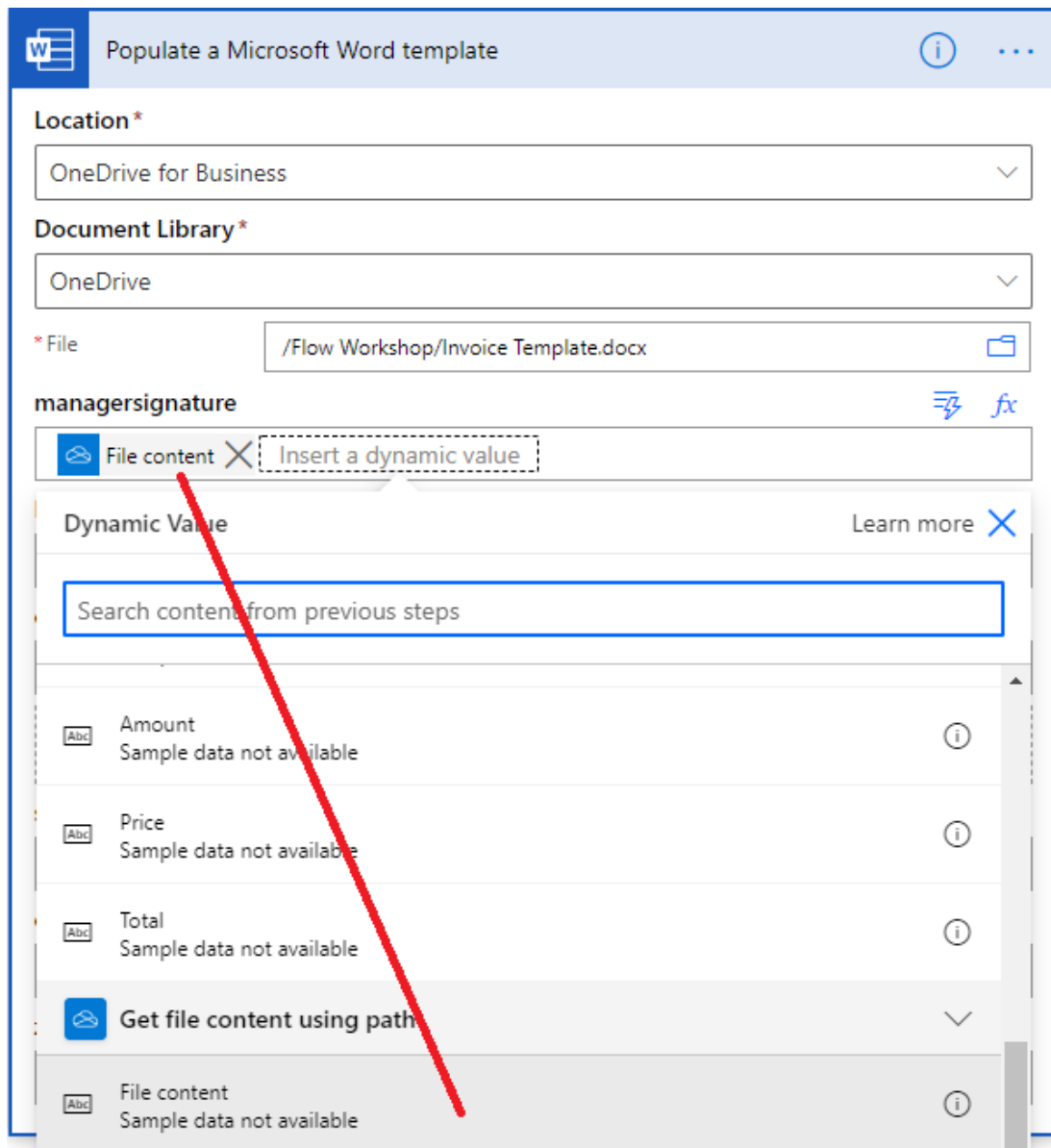
32. We will now display the signature portion of the document. Create a jpeg file with your name and signature, and upload it the Documents folder of your OneDrive for business. For instance, our signature looks like this:

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

