



Power Virtual Agents in a Day

Lab 05: Integrate Pre-built Power Automate Flows
Hands-on Lab Step-by-Step

March 2020

Contents

Power Automate..... 3

Goals for this lab 3

Before we start... 3

Task 1: Add on to the Return Items topic 3

Task 2: Call Get Order Info by Email action 6

Task 3: Add Return Item action to the conversation 9

Task 4: Test your conversation 12

Lab survey 14

Terms of Use 15

Power Automate

This lab is subject to the Terms of Use on page 15 of this document.

Goals for this lab

What you'll learn:



- Integrate Power Virtual Agents with Power Automate to initiate bot actions
- Create a topic that can complete a return and exchange process
- Connect Common Data Services (CDS) to your Power Virtual Agents, allowing for certain data recall between sessions.



The time to complete this lab is **[30]** minutes.

Before we start...

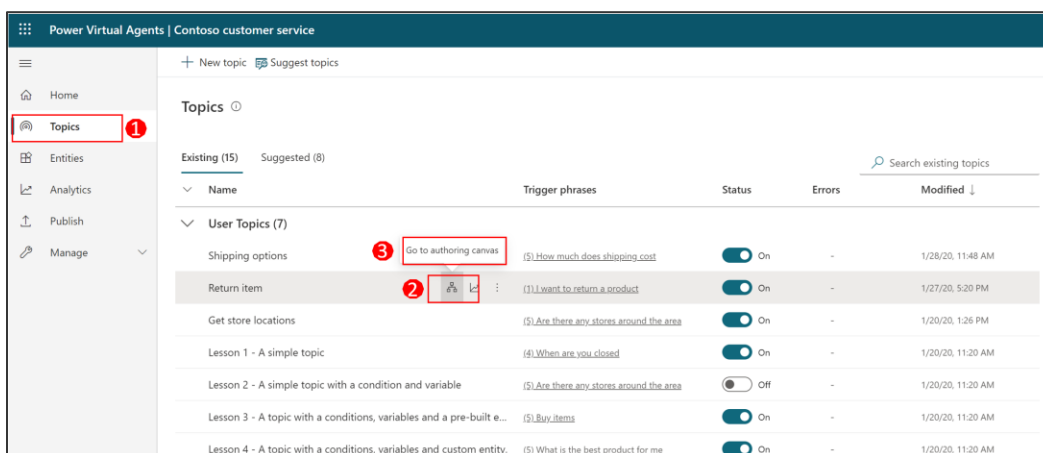
Ensure that you:

- **Imported** the Virtual Agent in a Day solution package to the environment where you have built your bot.
- **Fixed** connections for the imported Power Automate flows as instructed in the prerequisites in lab 01.

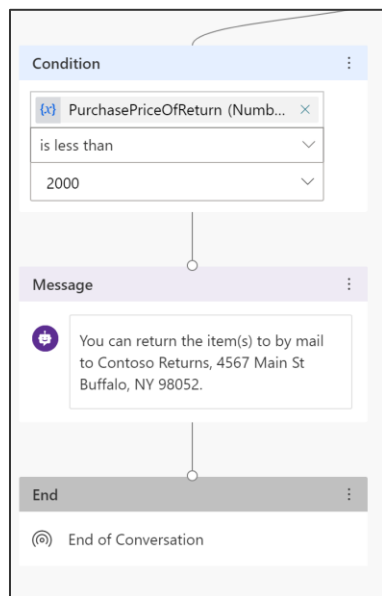
Navigate to <https://powerva.microsoft.com/> and sign in with your credentials.

Task 1: Add on to the Return Items topic

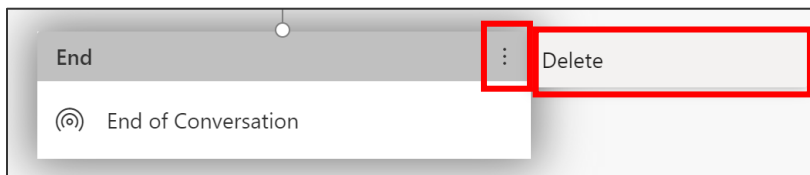
1. Click **Topics** in the left navigation pane.
2. Find the topic you built in Lab 4, **Return items**. Hover your mouse over the topic and then click the **Go to authoring canvas** button that appears. (See screenshot below.)



3. Scroll down the topic design until you find the Condition node where you branched on Purchase Price less than \$2000, and the Message node that says "You can return the item(s) by mail to Contoso Returns, 4567 Main St Buffalo, NY 98052."

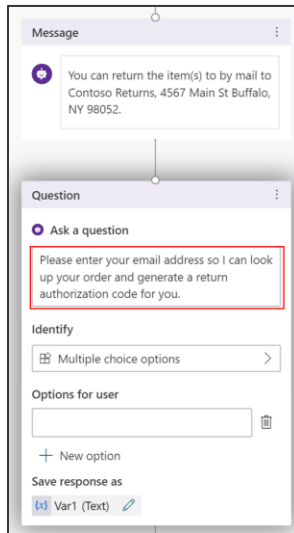


4. Delete the **End of Conversation** node that follows that Message node, by clicking the Options icon in the header and choosing **Delete**.



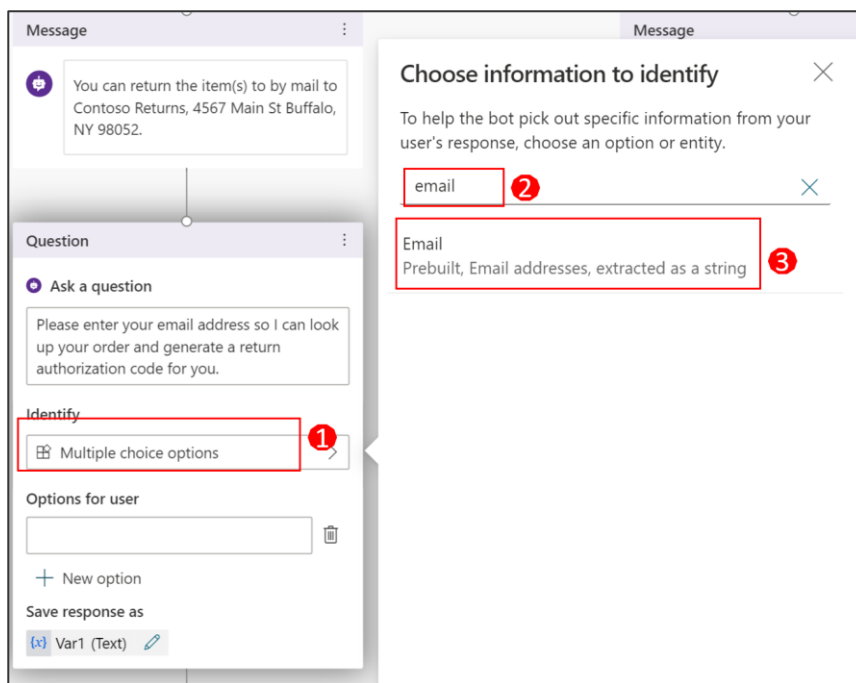
5. Where you just deleted the End of Conversation node, click the **Add node** button and select **Ask a question**. Use the question:

Please enter your email address so I can look up your order and generate a return authorization code for you.

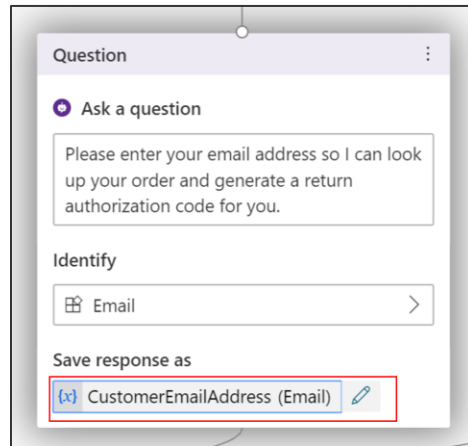


6. Click **Identify** field and choose **Email** from the Entities list.

When you use the Email entity, Power Virtual Agents will ensure that what the user enters is formatted as an email address. If they enter something else, it will ask again until they add a correctly formatted email address.




7. In the **Save response as** field, click the variable name **Var1**, and rename the variable name from **Var1** to **CustomerEmailAddress**.

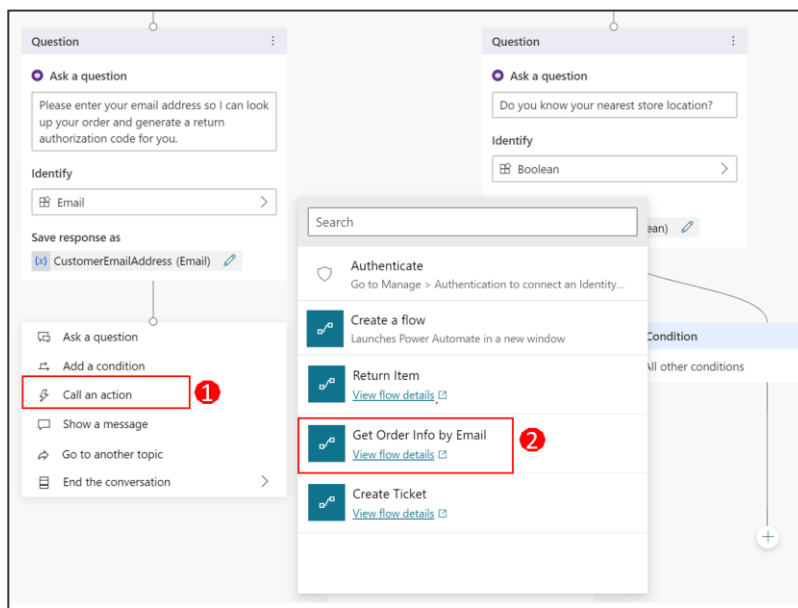


In the next task, we'll use the email address in a Power Automate action that looks up their order. Then we'll use another Power Automate flow to generate a code that authorizes the return.

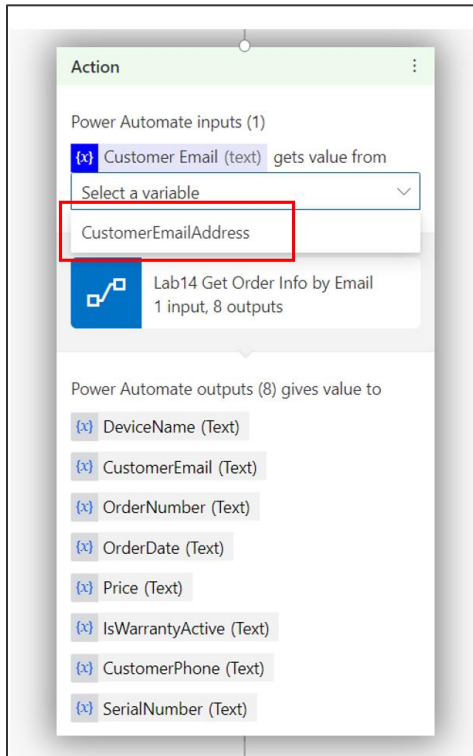
Task 2: Call Get Order Info by Email action

Now, we're going to use the email address to find the order, by adding the **Get Order Info by Email** flow (which you imported into your bot environment during the lab pre-requisites). This Power Automate flow finds the order record associated with the user's email address and returns information about the device order.


1. Click the **Add node**  button and select **Call an action**.
2. Choose **Get Order Info by Email** from the action list. (If you don't see this listed, you may need to complete the lab pre-requisites.)



3. The Power Automate flow tells you what inputs it needs. In the **Power Automate inputs** field, set it so that the flow will receive the value for **Customer Email** from the CustomerEmailAddress variable you used to capture the customer' email address in Task 1.



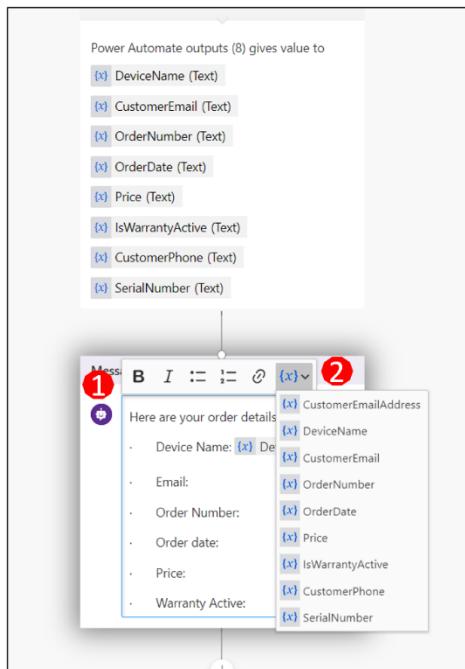
The Power Automate flow also tells you what outputs it will send you back as information stored in variables (which are named in the flow definition, not in the Power Virtual Agents topic). You can use those output variables in many ways; in this case you will show them to the user as text.

4. Click the **Add node**  button and select **Show a message**. We will show the order details to the user.
5. Copy and paste the text below into the **Show a message** node.

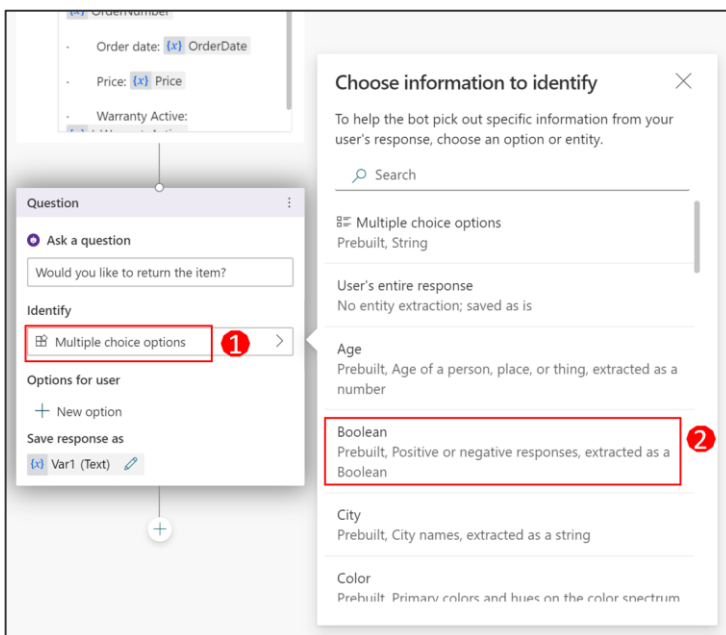
Here are your order details:

- Device name:
- Email:
- Order number:
- Order date:
- Price:
- Warranty Active:

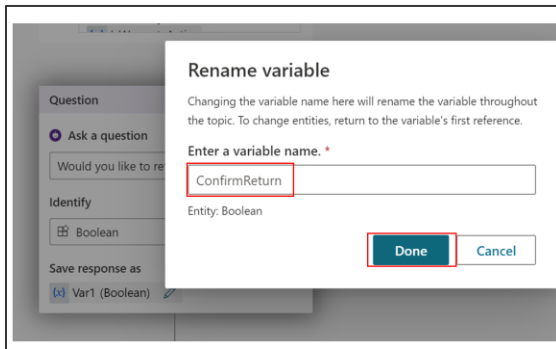
6. For each line item in the text (such as "Device name:"), click to place your cursor after the colon (":"), add a space, and select the corresponding variable from the **{x}** drop-down list in the node's editor bar. (Follow the screenshot below.)



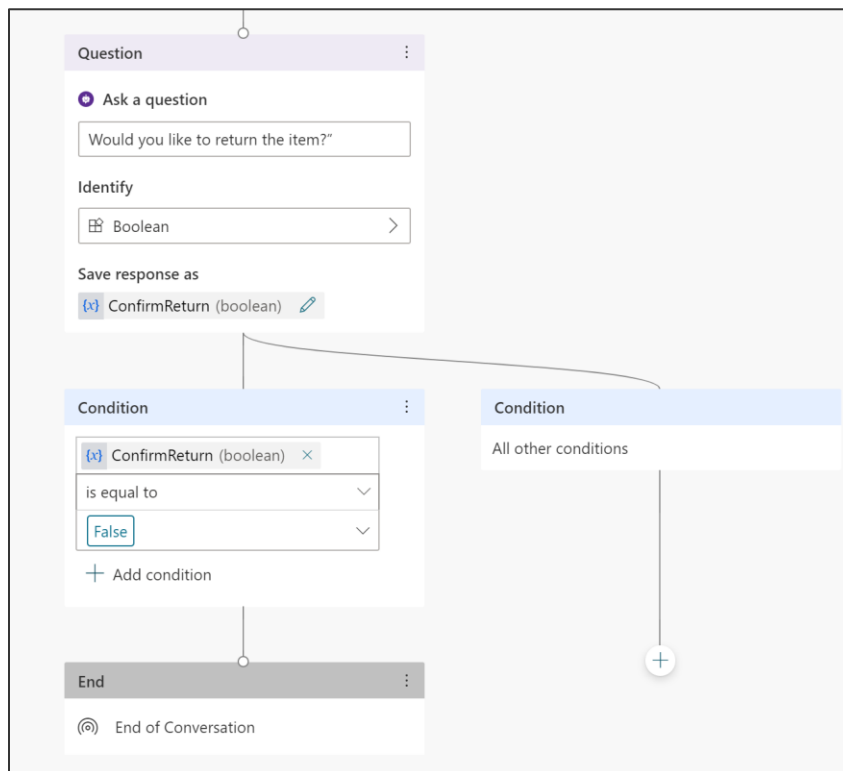
7. Add an **Ask a question** node.
8. Use the question "Would you like to return the item?" and choose **Boolean** as the entity type to identify. (This will show the user "Yes" and "No" buttons in the chat, though you won't see them in the authoring canvas.)



9. Name the variable **ConfirmReturn**.




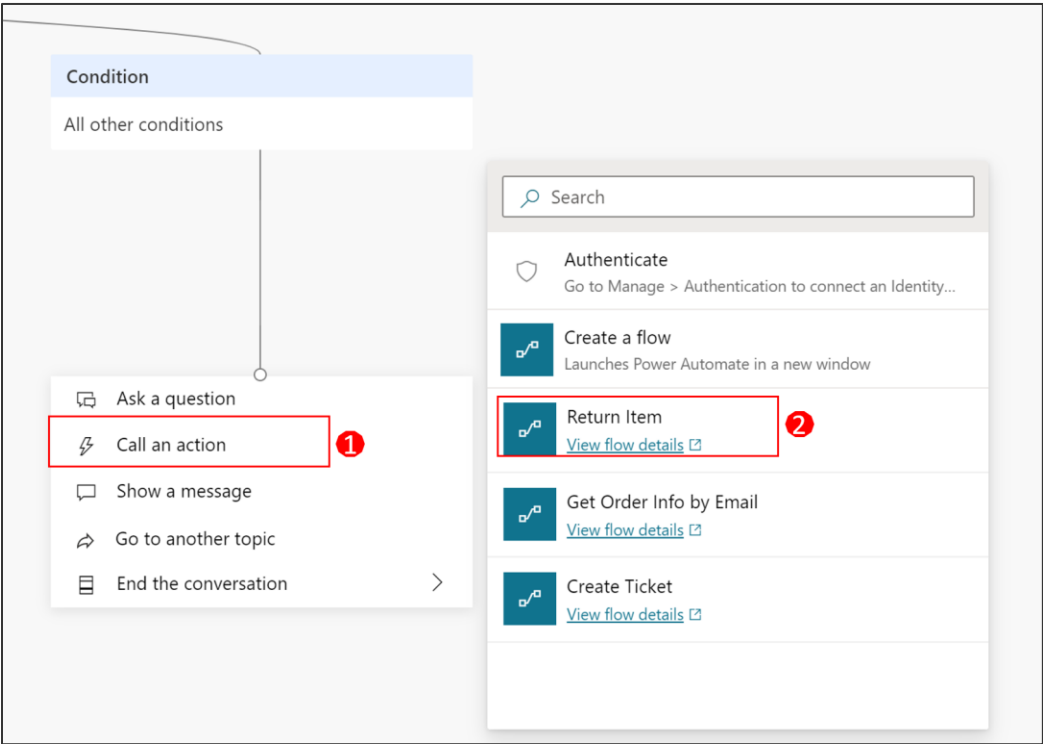
10. Add a **Conditional branch** to the conversation. In the Conditional branch, set up the node to test for the **ConfirmReturn** variable equal to False. (This branch will be for users who don't want to return their order after all.)
11. Add an **End the conversation > End with survey** node.



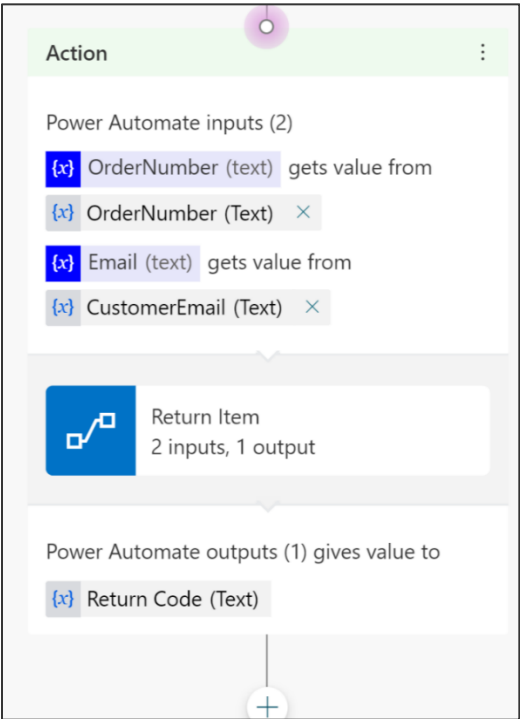
Task 3: Add Return Item action to the conversation

Next, we will add another Power Automate action, to return the device.

1. Under **All other conditions** (which will handle the "yes" response to the "Would you like to return the order?" question), click the **Add node**  button and select **Call an action**.
2. From the actions list, select **Return Item**.



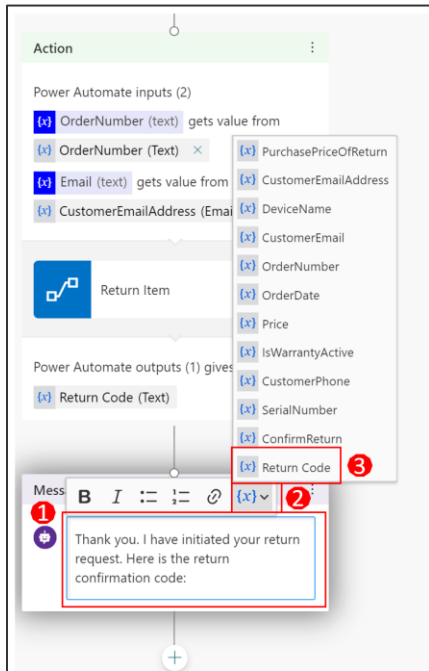
3. For **Power Automate inputs**, select the OrderNumber and CustomerEmailAddress variables. (See the following screenshot.)



4. Add a **Message** node after the action.

- Enter the text below and insert the **Return Code** variable from Return Item's output:

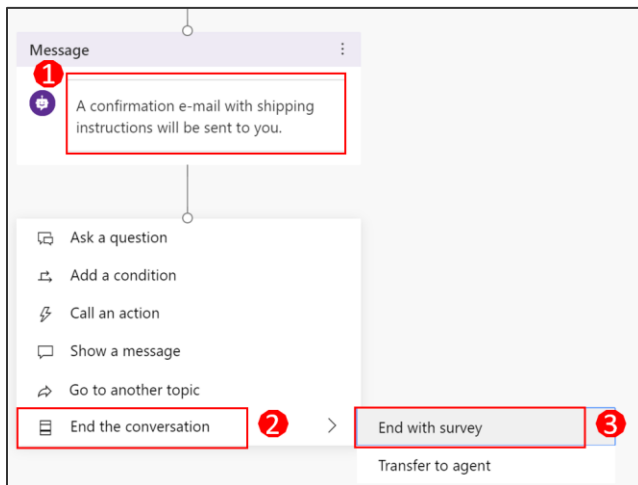
Thank you. I have initiated your return request. Here is the return confirmation code: {x}Return Code.



- Add a new **Message** node with message

A confirmation e-mail with shipping instructions will be sent to you.

- Then add an **End the conversation – End with survey**.

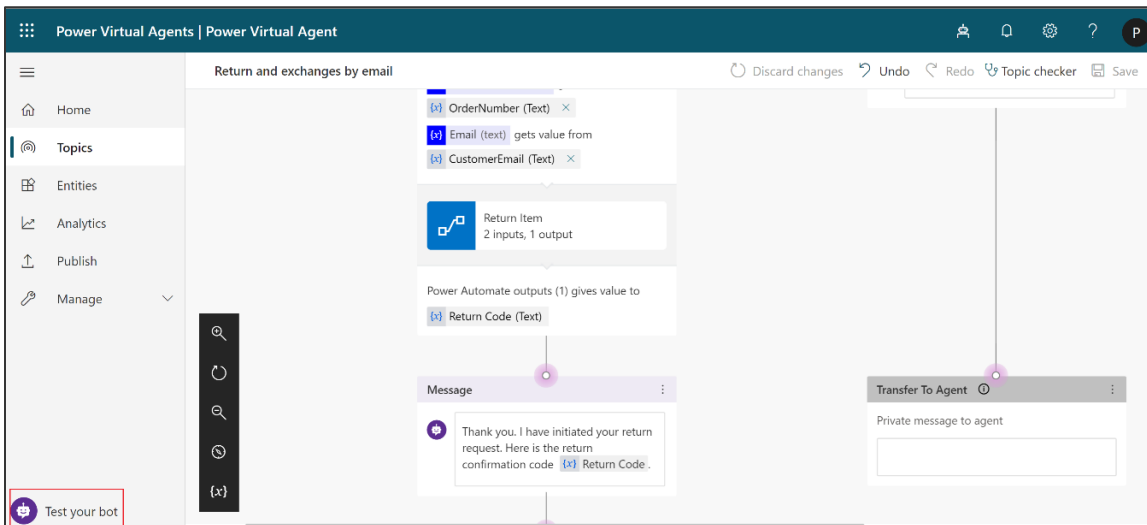


- Save the topic.

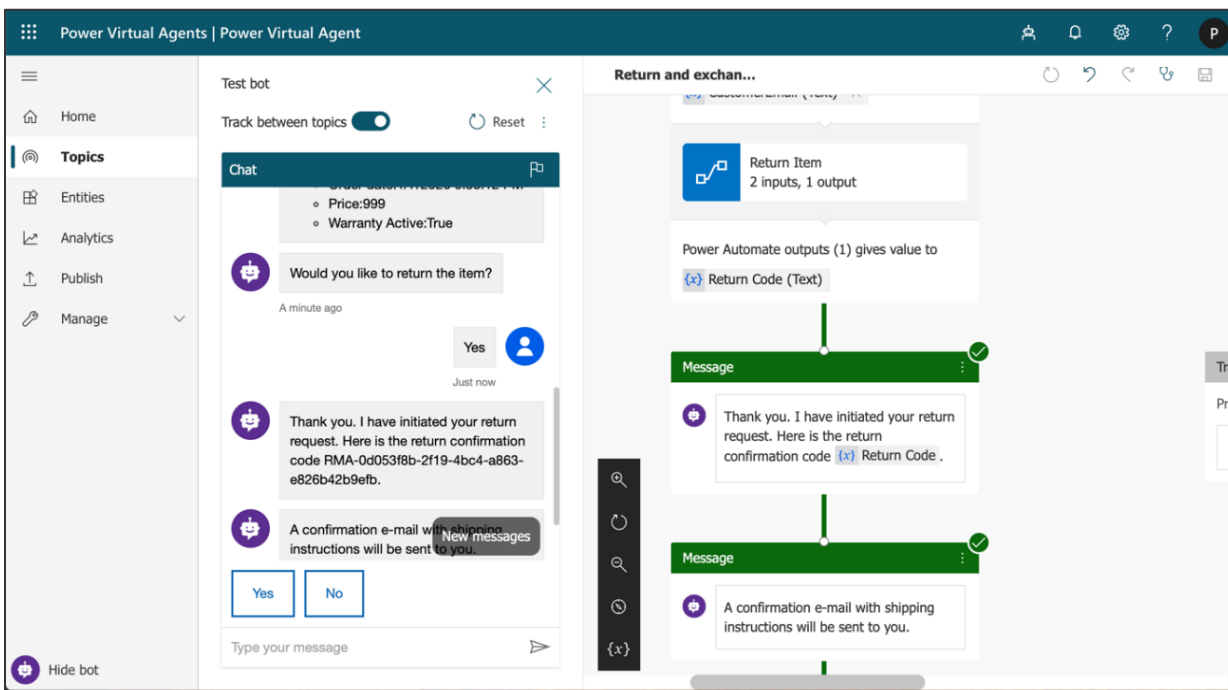
Note: the final message is just an example. You can challenge yourself by building your own Power Automate flow to send emails through your virtual agent.

Task 4: Test your conversation

1. Click **Test your bot**.

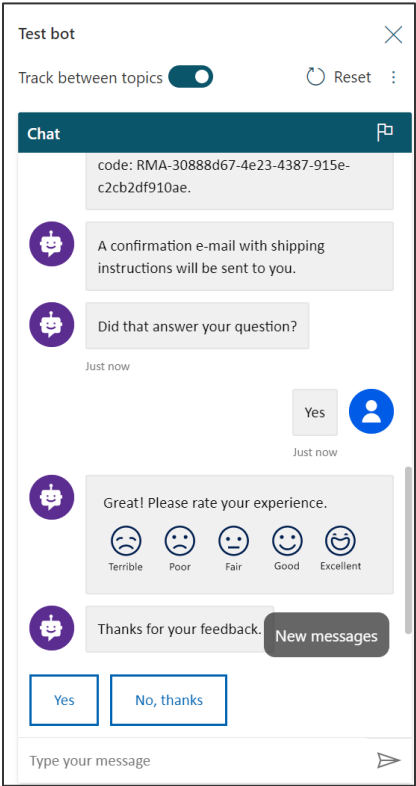


2. Turn on the **Track between topics** toggle
3. Ask the bot **"I want to return a product"**, then click **Send**.
4. When the virtual agent asks for your email address, provide the email address you are using for the labs.
5. Answer **"Yes"** to the question "Would you like to return the item?"



The virtual agent generates a return confirmation code.

6. Rate your experience.



Lab survey

We would appreciate your feedback on Power Virtual Agents and on this hands-on-lab, such as the quality of documentation and the usefulness of the learning experience.

Please use the survey at <https://aka.ms/PVAiaDSurvey> to share your feedback.

You may provide feedback for each module as you complete it or at the end once you've completed all the modules. Thank you!

Terms of Use

By using this document, in whole or in part, you agree to the following terms:

Notice

Information and views expressed in this document, including (without limitation) URL and other Internet Web site references, may change without notice. Examples depicted herein, if any, are provided for illustration only and are fictitious. No real association or connection is intended or should be inferred. This document does not provide you with any legal rights to any intellectual property in any Microsoft product.

Use Limitations

Copying or reproduction, in whole or in part, of this document to any other server or location for further reproduction or redistribution is expressly prohibited. Microsoft provides you with this document for purposes of obtaining your suggestions, comments, input, ideas, or know-how, in any form, ("Feedback") and to provide you with a learning experience. You may use this document only to evaluate its content and provide feedback to Microsoft. You may not use this document for any other purpose. You may not modify, copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell this document or any portion thereof. You may copy and use this document for your internal, reference purposes only.

Feedback

If you give Microsoft any Feedback about this document or the subject matter herein (including, without limitation, any technology, features, functionality, and/or concepts), you give to Microsoft, without charge, the right to use, share, and freely commercialize Feedback in any way and for any purpose. You also give third parties, without charge, the right to use, or interface with, any Microsoft products or services that include the Feedback. You represent and warrant that you own or otherwise control all rights to such Feedback and that no such Feedback is subject to any third-party rights.

DISCLAIMERS

CERTAIN SOFTWARE, TECHNOLOGY, PRODUCTS, FEATURES, AND FUNCTIONALITY (COLLECTIVELY "CONCEPTS"), INCLUDING POTENTIAL NEW CONCEPTS, REFERENCED IN THIS DOCUMENT ARE IN A SIMULATED ENVIRONMENT WITHOUT COMPLEX SET-UP OR INSTALLATION AND ARE INTENDED FOR FEEDBACK AND TRAINING PURPOSES ONLY. THE CONCEPTS REPRESENTED IN THIS DOCUMENT MAY NOT REPRESENT FULL FEATURE CONCEPTS AND MAY NOT WORK THE WAY A FINAL VERSION MAY WORK. MICROSOFT ALSO MAY NOT RELEASE A FINAL VERSION OF SUCH CONCEPTS. YOUR EXPERIENCE WITH USING SUCH CONCEPTS IN A PHYSICAL ENVIRONMENT MAY ALSO BE DIFFERENT.

THIS DOCUMENT, AND THE CONCEPTS AND TRAINING PROVIDED HEREIN, IS PROVIDED "AS IS", WITHOUT WARRANTY OF ANY KIND, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING (WITHOUT LIMITATION) THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE, AND NONINFRINGEMENT. MICROSOFT DOES NOT MAKE ANY ASSURANCES OR REPRESENTATIONS WITH REGARD TO THE ACCURACY OF THE RESULTS, THE OUTPUT THAT DERIVES FROM USE OF THIS DOCUMENT OR THE CONCEPTS, OR THE SUITABILITY OF THE CONCEPTS OR INFORMATION CONTAINED IN THIS DOCUMENT FOR ANY PURPOSE.

MICROSOFT POWER VIRTUAL AGENTS (1) IS NOT INTENDED OR MADE AVAILABLE AS A MEDICAL DEVICE FOR THE DIAGNOSIS OF DISEASE OR OTHER CONDITIONS, OR IN THE CURE, MITIGATION, TREATMENT OR PREVENTION OF DISEASE, OR OTHERWISE TO BE USED AS A COMPONENT OF ANY CLINICAL OFFERING OR PRODUCT, AND NO LICENSE OR RIGHT IS GRANTED TO USE MICROSOFT POWER VIRTUAL AGENTS FOR SUCH PURPOSES, (2) IS NOT DESIGNED OR INTENDED TO BE A SUBSTITUTE FOR PROFESSIONAL MEDICAL ADVICE, DIAGNOSIS, TREATMENT, OR JUDGMENT AND

SHOULD NOT BE USED AS A SUBSTITUTE FOR, OR TO REPLACE, PROFESSIONAL MEDICAL ADVICE, DIAGNOSIS, TREATMENT, OR JUDGMENT, AND (3) SHOULD NOT BE USED FOR EMERGENCIES AND DOES NOT SUPPORT EMERGENCY CALLS. ANY CHATBOT YOU CREATE USING MICROSOFT POWER VIRTUAL AGENTS IS YOUR OWN PRODUCT OR SERVICE, SEPARATE AND APART FROM MICROSOFT POWER VIRTUAL AGENTS. YOU ARE SOLELY RESPONSIBLE FOR THE DESIGN, DEVELOPMENT, AND IMPLEMENTATION OF YOUR CHATBOT (INCLUDING INCORPORATION OF IT INTO ANY PRODUCT OR SERVICE INTENDED FOR MEDICAL OR CLINICAL USE) AND FOR EXPLICITLY PROVIDING END USERS WITH APPROPRIATE WARNINGS AND DISCLAIMERS PERTAINING TO USE OF YOUR CHATBOT. YOU ARE SOLELY RESPONSIBLE FOR ANY PERSONAL INJURY OR DEATH THAT MAY OCCUR AS A RESULT OF YOUR CHATBOT OR YOUR USE OF MICROSOFT POWER VIRTUAL AGENTS IN CONNECTION WITH YOUR CHATBOT, INCLUDING (WITHOUT LIMITATION) ANY SUCH INJURIES TO END USERS.