Exercise - Create an approval flow with Copilot in Power Automate

In this exercise, you'll create an automation by using Copilot in Power Automate to automate the approval process for a real estate showing. You'll use Copilot to create a flow that sends an email to the real estate agent when a new showing is requested. Then, the agent can approve or reject the showing request from within the email.

Follow these steps to create a flow by using Copilot.

1. Sign in to Power Automate.
2. In the center of the **Home** page within Power Automate, in the text field on **Start building your flow with Copilot**, enter the following prompt:

   ```
   request approval when a Dataverse record is created
   ```

   Select the **Submit** button.

3. From the prompt, Copilot provides the outline for a suggested flow that you can review. Expect your flow to have two basic steps, the Dataverse **When a row is added, modified, or deleted trigger** and the **Start and wait for an approval** step. To accept the flow, select **Next**, alternatively, you can select **Show a different suggestion**. See if Copilot will suggest a flow similar to the image below.

4. Review the connected apps and services. If a connection hasn't been made, edit or fix it and then select **Create flow**.

The Edit with Copilot designer opens with your flow along with a Copilot chat window on the right.
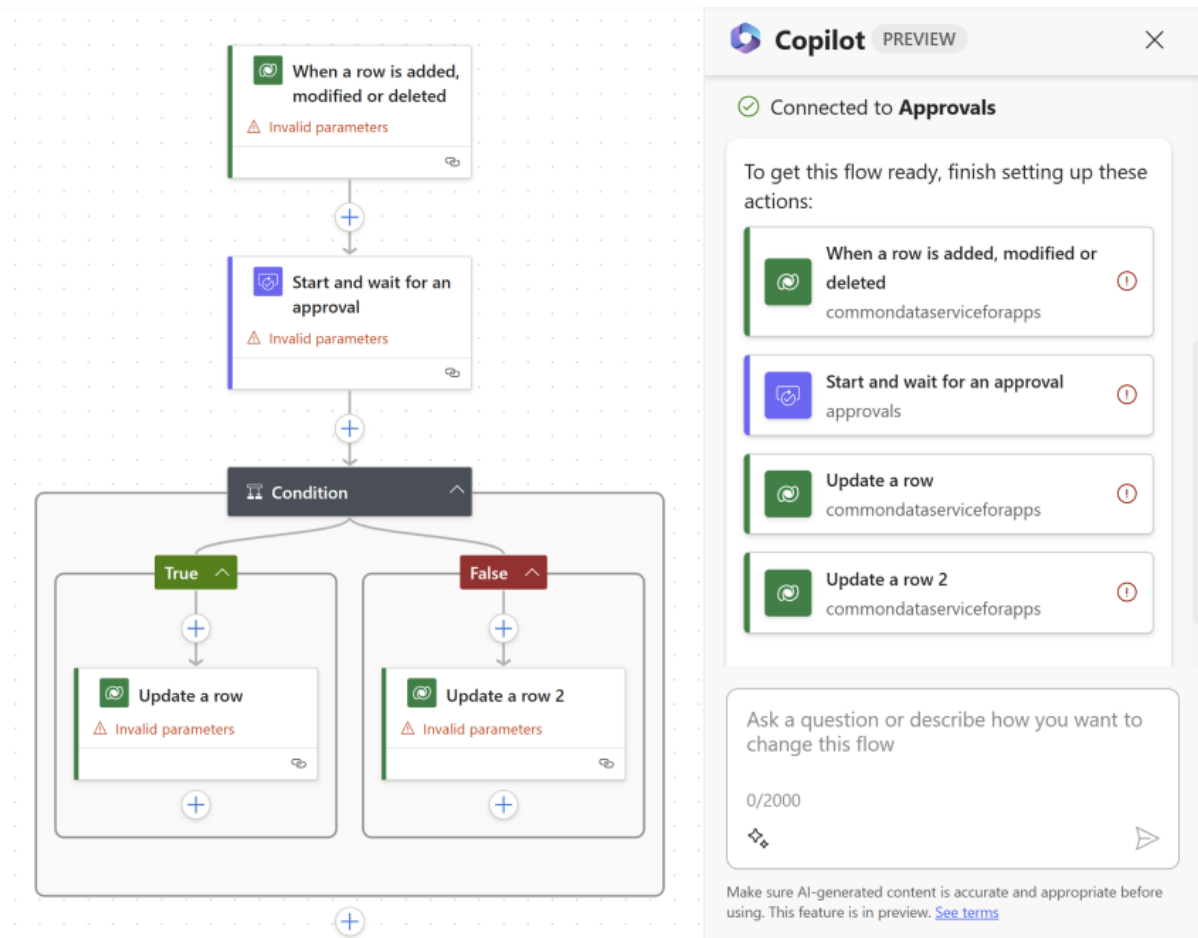
5. Set up some parameters by selecting the **When a row is added, modified, or deleted** trigger.

    A panel on the left side of the screen shows the trigger details, including an empty **Table Name** parameter that's required.

6. From the **Table Name** dropdown menu, search for and select **Real Estate Showings**.

7. Select the **Start and wait for an approval** action.

   Notice that the **Approval Type** parameter is missing.

8. From the **Approval Type** dropdown menu, select **Approve/Reject - First to respond**.

   After you select the **Approval Type**, more parameters are now available.

Start and wait for an approval

Parameters ●   Settings   Code View   Testing   About

Approval Type *

Approve/Reject - First to respond ⌄

Title *

Create a title for the approval

'Title' is required.

Assigned To *

Email addresses, separated by a semicolon (;)

'Assigned to' is required.

Details

Markdown supported (see https://aka.ms/approvaldetails)

Item Link

Add a link to the item to approve

Item Link Description

Describe the link to the item

Advanced parameters

Showing 0 of 4 ⌄   Show all   Clear all

Connected to Approvals.   Change connection

9. In the Copilot chat window, enter the following prompt:

   Add "New Request for Real Estate Showing" as the Title parameter for the Start and wait for an approval action

   It takes a few seconds for Copilot to process the prompt. When processing is complete, the **Title** parameter is populated with the prompt text.

Start and wait for an approval

Parameters   Settings   Code View   Testing   About

Approval Type *

Approve/Reject - First to respond

Title *

New Request for Real Estate Showing

10. For the **Assigned To** parameter, enter the email address that you're using for this lab. This email address is the one that receives the approval request.

11. For the **Details** parameter, enter the following text:

    A new request for a real estate showing has been created. Please review the details below and approve or reject the request:

    Property: Client: Client Email: Date: Time:

12. Place your curser next to **Property:** in the Details parameter and then, select the lightning icon to open the **Dynamic content** pane.

Details

A new request for a real estate showing has been created. Please review the details below and approve or reject the request:

Property:

Client:

Client Email:

Date:

Time:

13. In the **Dynamic content** pane, you can select **See More** to expand the list of available dynamic content.

14. Scroll down until you find the **Address** field and then select it. You can also type *Address* in the search field to find it quickly.

    The **Address** dynamic content field is now added to the **Details** parameter.

15. Complete the same steps for the **Client**, **Client Email** , **Date**, and **Time** fields.

    When you're done with the rest of the fields, the values should resemble the following image.

Details

A new request for a real estate showing has been created. Please review the details below and approve or reject the request:

Property: ⓐ Address ×

Client: ⓐ Client Fu... ×

Client Email: ⓐ Client E... ×

Date: ⓐ Date ×

Time: ⓐ Time ×

16. Select the **Condition** action. If your flow doesn't have a Condition action, go ahead and add it now by selecting the **Insert a new step...**
    (+) button under the approval step.

Start and wait for an approval

⊕

⎏ Condition ⌃

True ⌃   False ⌃
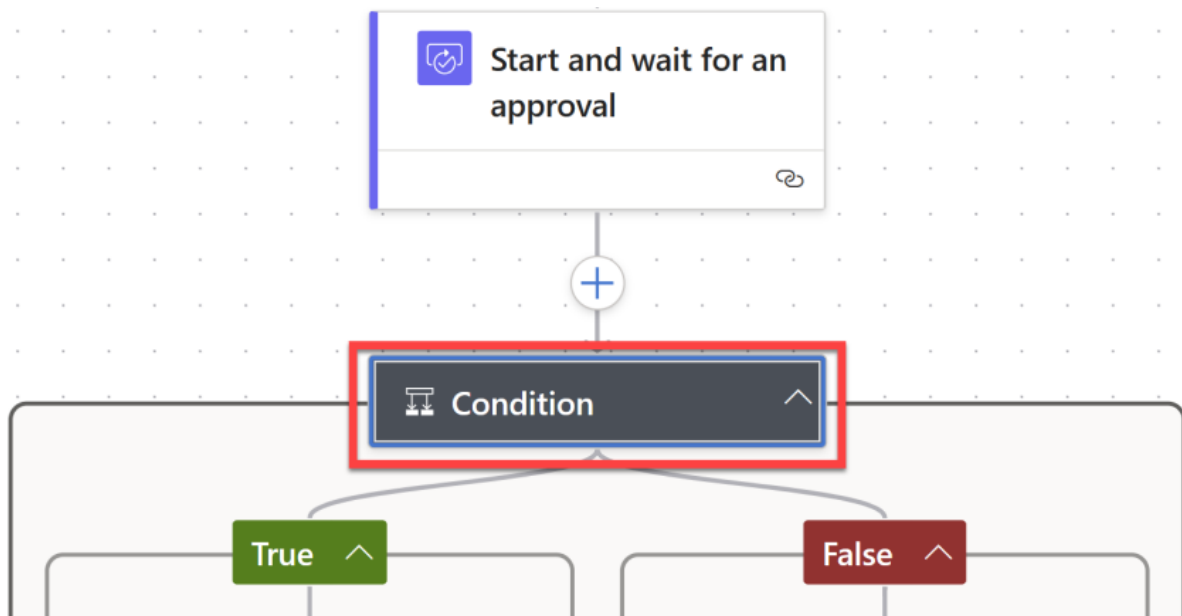
17. Select the **Choose a value** box and then select **Outcome** from the **Dynamic content** pane.
18. Select **is equal to** for the condition and then enter **Approve** for **Value**.

Condition Expression *
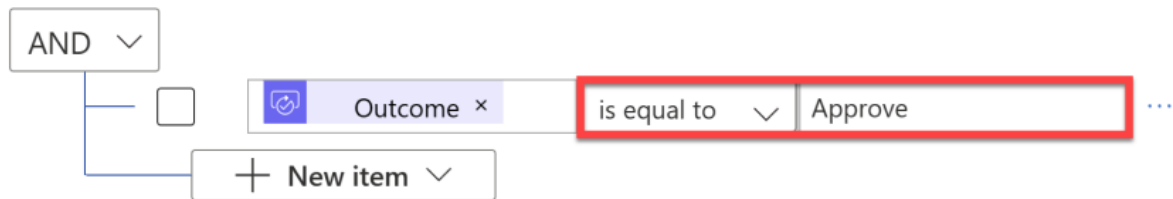
19. Ensure that you have an **Update a row** action from Dataverse under both the **True** and **False** branches of the condition. You might need to add it to your flow if Copilot hasn't already put it there.
20. From the **Table Name** dropdown, search for and select **Real Estate Showings**.
21. Select the **Row ID** field and then select the **Real Estate Showings** unique identifier field from the **Dynamic content** pane.
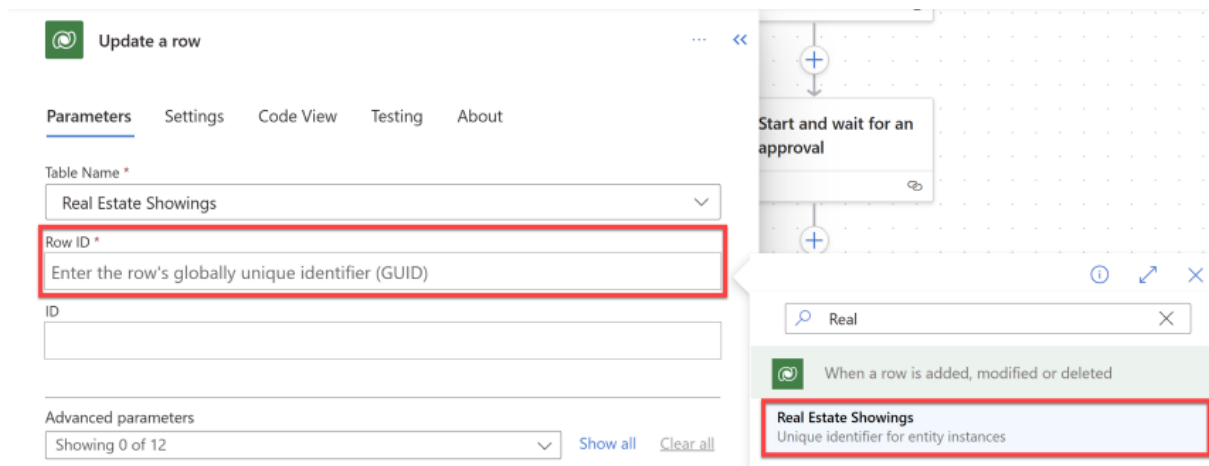
Whenever you create a table in Microsoft Dataverse, a column is automatically created with the same name of the table. This column serves as the unique lookup ID for the record (or row) that was created.

22. Select **Show all** under **Advanced parameters**.
23. Select **Confirmed** from the **Status** dropdown menu.

Date

Owner (Owners)

Owner Id

Status

Confirmed ⌄

Status

Status of the Real Estate Showings ⌄

Status Reason

Reason for the status of the Real Estate Showings ⌄

When a showing is approved, the **Status** field in the **Real Estate Showings** table is updated to **Confirmed**.

24. Select your **Update a row** action for Dataverse under the **False** branch of the condition. (Add this action if it's missing.)
25. From the **Table Name** dropdown menu, search for and select **Real Estate Showings**.
26. Select the **Row ID** field and then select the **Real Estate Showings** unique identifier field from the **Dynamic content** pane.
27. Select **Show all** under **Advanced parameters**.
28. Select **Canceled** from the **Status** dropdown menu.

When a showing is rejected, the **Status** field in the **Real Estate Showings** table is updated to **Canceled**.

29. In the Copilot chat window, enter the following prompt and then submit:

Under the "Update a row" action for both branches in the condition, add a new "Send an email (V2)" action

After a few seconds, Copilot should explain what it did, as shown in the following image.

Added these actions:

Send an email
Office 365 Outlook

Send an email 2
Office 365 Outlook

Check these actions to see if any parameters need to be set.

⤺ Undo

AI-generated content may be incorrect 👍 👎
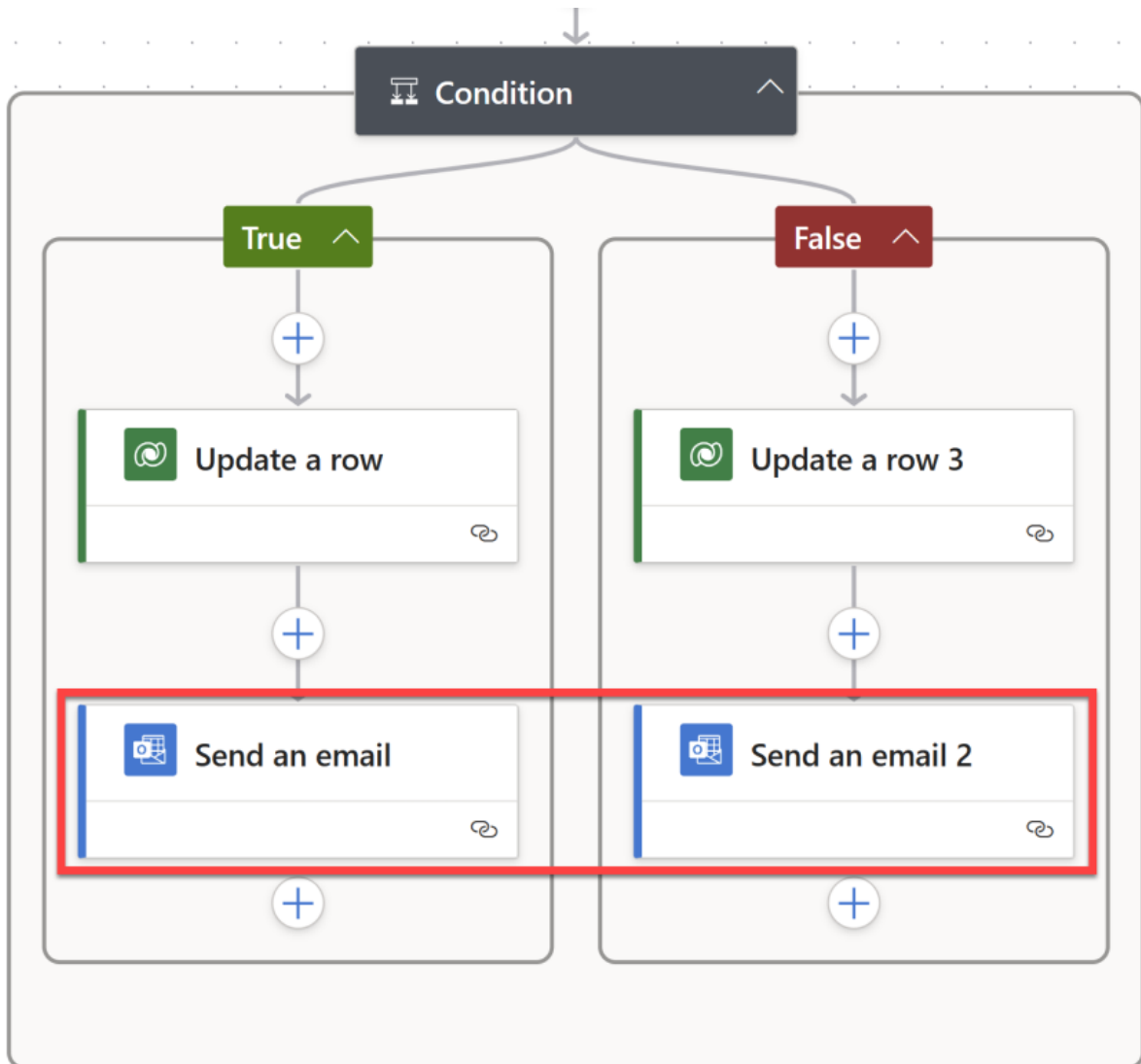
✓ Connected to **Office 365 Outlook**

✓ All required parameters were set

Ask a question or describe how you want to change this flow

0/2000

✦

The updated flow should display. You might need to fix a connection in a previous step to continue. Go ahead and fix any errors before continuing.

30. Select the **Send an email** action under the **True** branch of the condition.
31. Select the **To** field, remove the `example@example.com` email address, and then select the **Client Email** field from the **Dynamic content** pane.
32. For the **Subject** field, enter the following text into the Copilot chat window and then press the **Enter** key on your keyboard:

    Add "Your request for a real estate showing has been approved" as the Subject parameter for the Send an email action

    The **Subject** field should populate with the prompt text.

Send an email

Parameters   Settings   Code View   Testing   About

To *

> body/cr8... ×

Subject *

> Your request for a real estate showing has been approved

33. For the **Body** field, enter the following text into the Copilot chat window and then press the **Enter** key on your keyboard:

> Add "Good day - Your request for a real estate showing has been approved. Please see below for details." as the Body parameter for the Send an email action

The **Body** field should populate with the prompt text.

Body *

↺   ↻   Normal ∨   Arial ∨   15px ∨   **B**   *I*   U̲   ⌘   A ∨   🖌 ∨
Good day - Your request for a real estate showing has been approved. Please see below for details.

34. Enter the following content after the **Body** text:

Property:

Agent Name:

Showing Date:

Showing Time:

Add the **Address**, **Agent Name**, **Date**, and **Time** fields from the **Dynamic content** pane to the appropriate lines in the **Body** text.

35. Add the **Response summary** field from the **Dynamic content** pane to the end of the **Body** text.

Body *

36. Select the **Send an email** action under the **False** branch of the condition.
37. Select the **To** field, remove the `example@example.com` email address, and then select the **Client Email** field from the **Dynamic content** pane.
38. For the **Subject** field, enter the following content into the Copilot chat window and then press the **Enter** key on your keyboard:

    Add "Your request for a real estate showing has been rejected" as the Subject parameter for the Send an email action

    Copilot doesn't always understand what you request, therefore you might not always get exactly what you're expecting, so you can choose to "undo" or you can manually add to your flow. Copilot is a collaboration tool designed to assist you, but Copilot might not always interpret correctly what you're telling it to do for you.

39. For the **Body** field, enter the following text into the Copilot chat window and then press the **Enter** key on your keyboard:

    Add "Good day - Your request for a real estate showing has been rejected. Please see below for details." as the Body parameter for the Send an email action

If for some reason that Copilot misses this, you can undo and try again, or make the adjustment manually.

40. Enter the following content after the **Body** text:

    Property:

    Agent Name:

    Showing Date:

    Showing Time:

    Add the **Address**, **Agent Name**, **Date**, and **Time** fields from the **Dynamic content** pane to the appropriate lines in the **Body** text.

41. Add the **Response summary** field from the **Dynamic content** pane to the end of the **Body** text.

To *

| ⊚ body/cr8... × | ✕ |

Subject *

Your request for a real estate showing has been rejected

Body *

| ↺ ↻ | Normal ∨ Arial ∨ 15px ∨ | **B** *I* <u>U</u> ⊙ A∨ ⬥∨ |

Good day - Your request for a real estate showing has been rejected. Please see ▲
below for details. Property: ⊚ Address ×

Agent Name: ⊚ Agent N... ×

Showing Date: ⊚ Date ×

Showing Time: ⊚ Time ×

⊚ Respons... ×

42. Rename the flow to **Request Approval for Real Estate Showing** by selecting the **request approval when a Dataverse record is created** text in the upper-left corner of the screen.
43. Save the flow by selecting the **Save** button in the upper-right portion of the screen command bar.
44. Test the flow by selecting the **Test** button in the upper-right corner of the screen. Select **Manually** and then select **Test**.

Test Flow ✕

⦿ **Manually**
Perform the starting action to trigger it.

◯ Automatically
There are no runs for this flow.

[Test] [Cancel]

45. To submit a real estate showing request, go to the Real Estate Showings app in [Power Apps](#).
46. Run the app and then select **+New** to create a new showing request.
47. Fill in the fields with the following information:
    - **Agent Name** - `< random name >`
    - **Client Full Name** - `< Your name >`
    - **Client Email** - `< Your email >` (the email that you're using for this lab)
    - **Date** - `< Any future date >`
    - **Time** - `< Any future time >`
    - **Status** - Pending
    - **Address** - 210 Pine Road, Portland, OR 97204

    Note

    This address is one of the addresses from the Microsoft Excel file in Module 1; it's the same file that you uploaded and turned into the **Real Estate Properties** table.

    Usually, you would have a lookup field to the **Real Estate Properties** table, but not for this lab to keep it simple.

48. Select the check mark in the upper-right corner of the screen.
49. Select the **X** in the upper-right corner to close out of the app.

   The flow runs and sends an approval email to the email address that you provided in the flow that you built.

50. Sign in to the email account that you're using for this lab and then wait for the email to arrive.

   Note

   If the flow doesn't run immediately, make sure that you wait for it. It might take up to 10 minutes for the flow to be triggered, especially on the first try.

   The approval should resemble the following image.

Approvals | Power Automate

New Request for Real Estate Showing

Requested by

Date Created

A new request for a real estate showing has been created. Please review the details below and approve or reject the request:
Property: 210 Pine Road, Portland, OR 97204
Client: User One
Client Email: user1@M365x48983521.onmicrosoft.com
Date: 2023-09-13
Time: Thursday, September 14, 2023 9:00 AM GMT

[Approve ⌄]   [Reject ⌄]

51. Select **Approve**.
52. Add a comment and then select **Submit**.

The flow continues to run; it updates the row and sends an email to the requestor. The email that's sent to the requester resembles the following image.

To: User One

Good day - Your request for a real estate showing has been approved. Please see below for details.

Property: 210 Pine Road, Portland, OR 97204

Agent Name: Agent Smith

Showing Date: 2023-09-13T22:00:00Z

Showing Time: 2023-09-14T09:00:00Z

53. Check the flow and notice that the flow is now marked as **Succeeded** in the run history.

✓ Your flow ran successfully.

»

0s ✓

⊚ When a row is added,
modified or deleted

🔗

8m 54s ✓

⊚ Start and wait for an
approval

🔗

2s ✓

⌸ Condition ∧

True ∧

1s ✓

⊚ Update a row

🔗

0.6s ✓

▣ Send an email

🔗

False ∧

0s ⊖

⊚ Update a row 3

ⓘ ActionBranchingCondition...

🔗

0s ⊖

▣ Send an email 2

ⓘ ActionConditionFailed. The...

🔗

+
−
⌗
🔍
▦