Creating a smart expense claims bot using Flow and Bizzy

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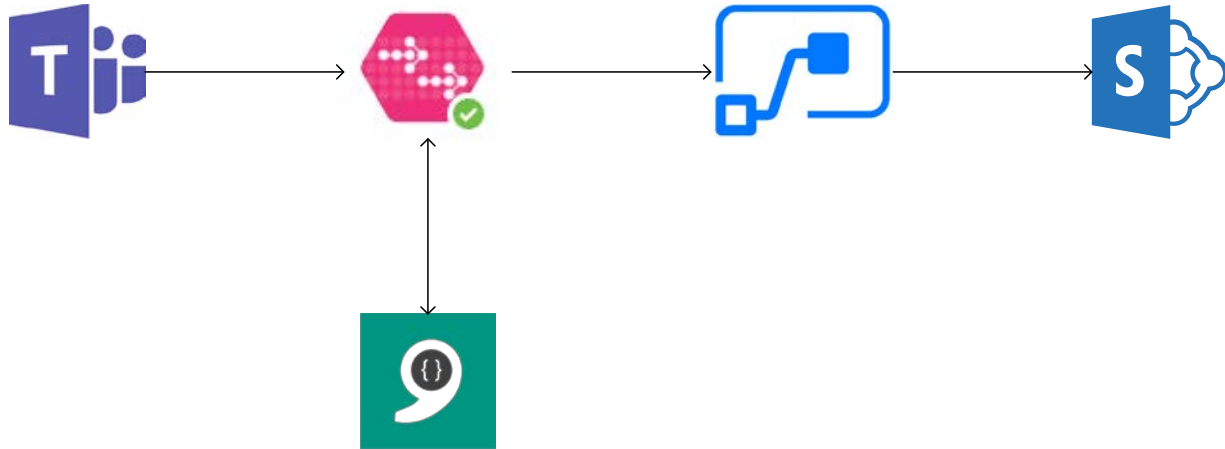# Contents

Objective

In this lab, we will create a bot which can be used to claim our expenses. The bot will be built using Bizzy, and can be started from Microsoft Teams by using natural language. When started, the bot will ask us about our expenses and will finally place the claim for approval in SharePoint.
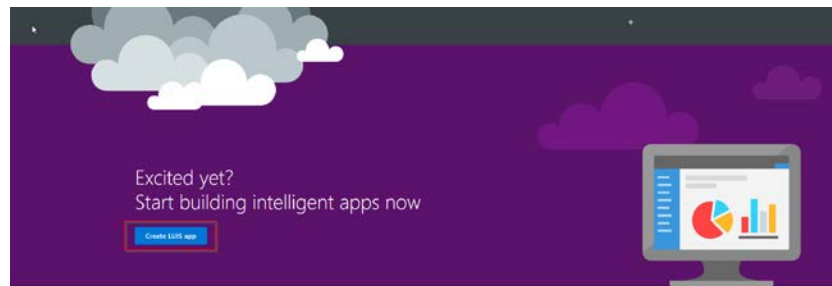

Prerequisites

- Office 365 with SharePoint Online (trial)
- Azure Storage Explorer: https://azure.microsoft.com/en-us/features/storage-explorer/

Step-by-step guide

Setting up LUIS

We will start by setting up LUIS (Language Understanding), which will be used by Bizzy to interpret our sentences when we start talking to our bot. Sign in to LUIS using your Office 365 account.

Now create a new LUIS app. This will hold our intents which will be used to start our expense claim.

Give the app a clear name.

Create a new intent, which will be used to store and train our utterances (sentences).

Add a couple of sentences, like "*I have expenses to claim*". These will be used inside the machine learning of LUIS to recognize our intents, even when using different sentences. Once done, train the application.

Now that our application is trained to understand us, let's publish it. Write down your key string, as you will be needing this later on.

Create Bizzy Account

The next step is to create a Bizzy account. Bizzy provides an easy way to create bots using Flow. We will be using the free version in this lab.

Launch the teams web app, to start working with Bizzy.
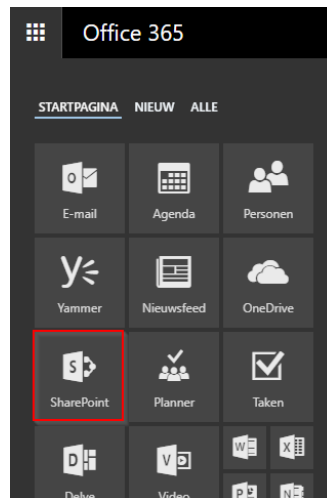
Say something to Bizzy to get to the login.
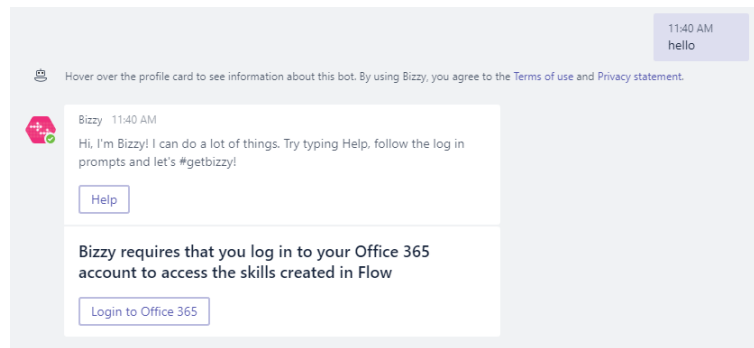
Sign in using your Office 365 account and allow Bizzy to access your profile.
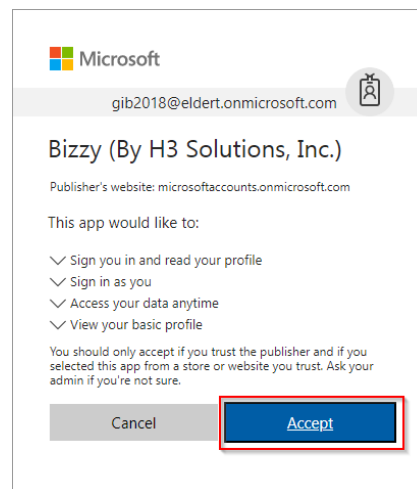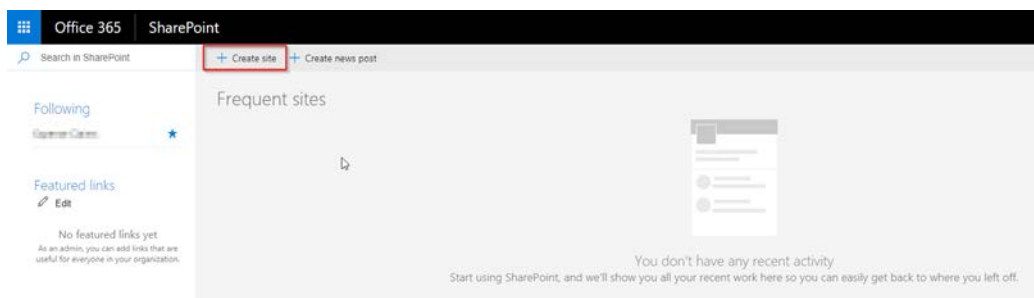
Create SharePoint list
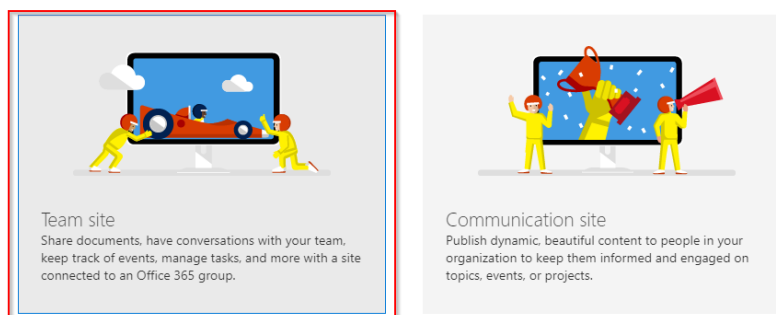
We will be using SharePoint to store the expense claims.
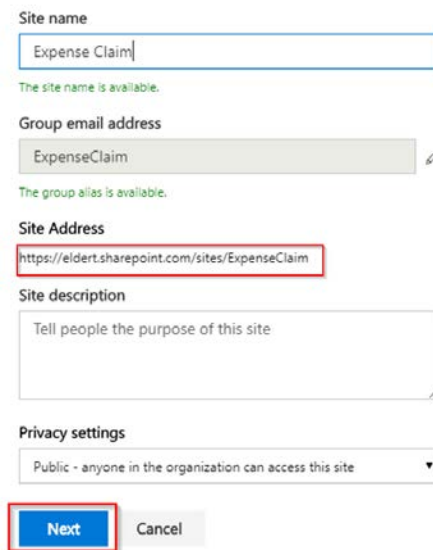

Create a new site, which will be used for this purpose.

Give your site a clear name, and write down the Site Address, as we will be needing this later on.
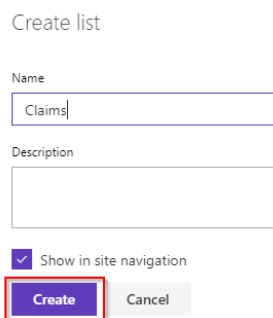
Site name

Expense Claim

The site name is available.

Group email address

ExpenseClaim

The group alias is available.

Site Address

https://eldert.sharepoint.com/sites/ExpenseClaim

Site description

Tell people the purpose of this site

Privacy settings

Public - anyone in the organization can access this site

Next   Cancel

When the site has been created, add a List to it.

Ts   Team site
      Public group

+ New ∨

List
Document library
Page
News post
App
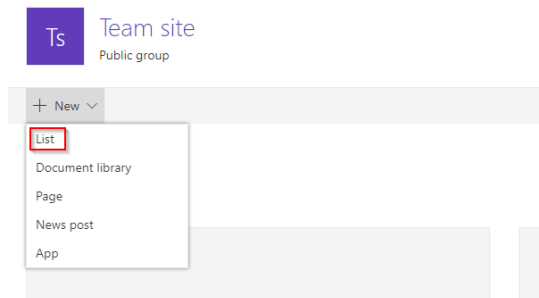
This list will be used to hold and approve our expense claims.

Create list

Name

Claims

Description

☑ Show in site navigation

Create   Cancel

CIBC
GLOBAL INTEGRATION BOOTCAMP

Add columns for the amount of expenses claimed and approval.

Create a column

Learn more about column creation.

Name *

```
Approved
```

Description

```

```

Type

```
Yes/No                                    ⌄
```

Default value
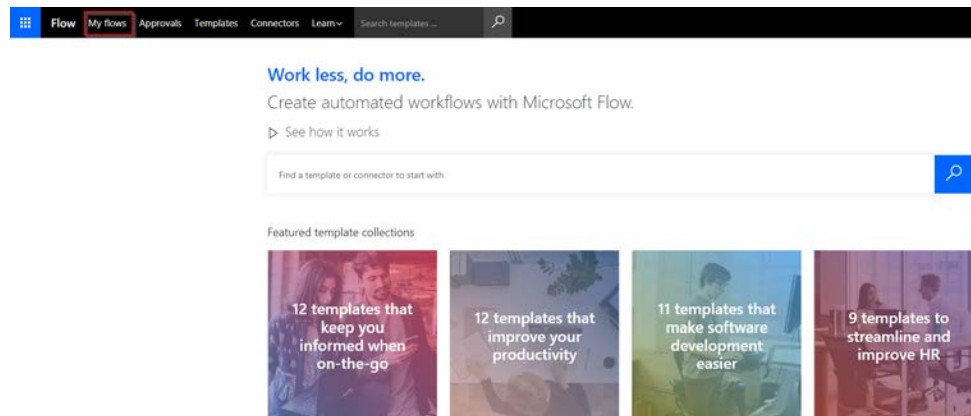
```
No                                        ⌄
```
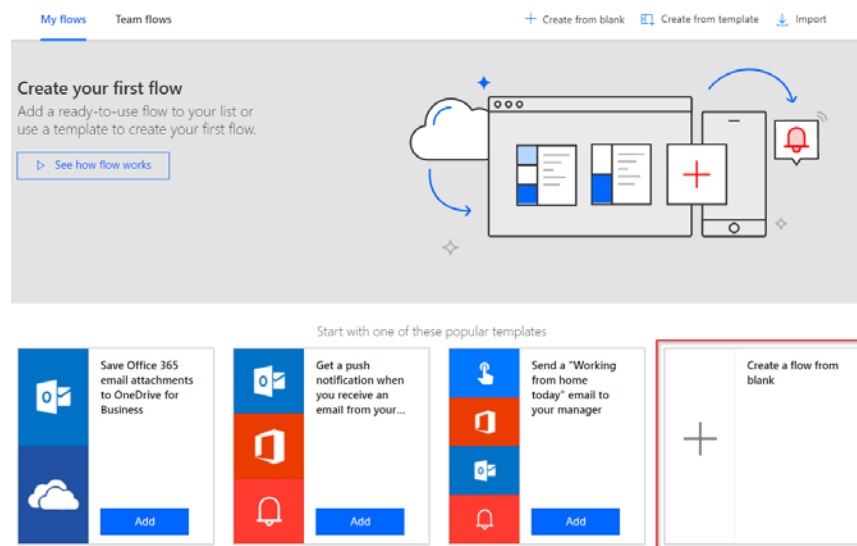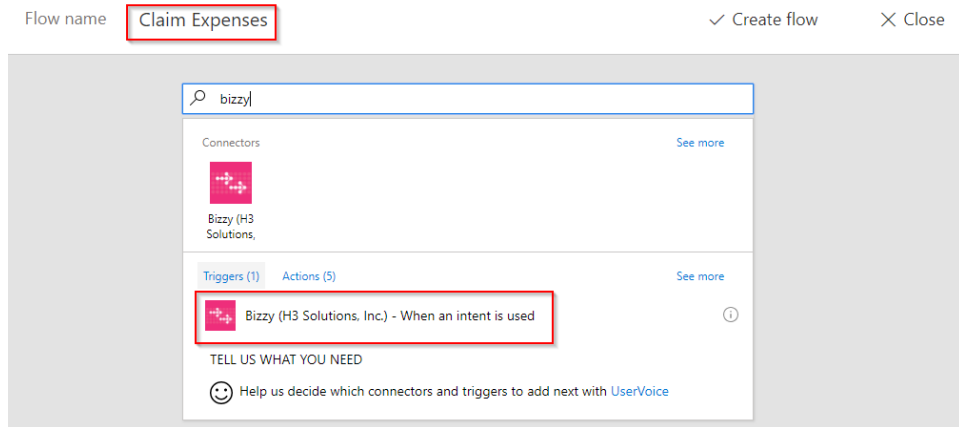
More options

Save   Cancel

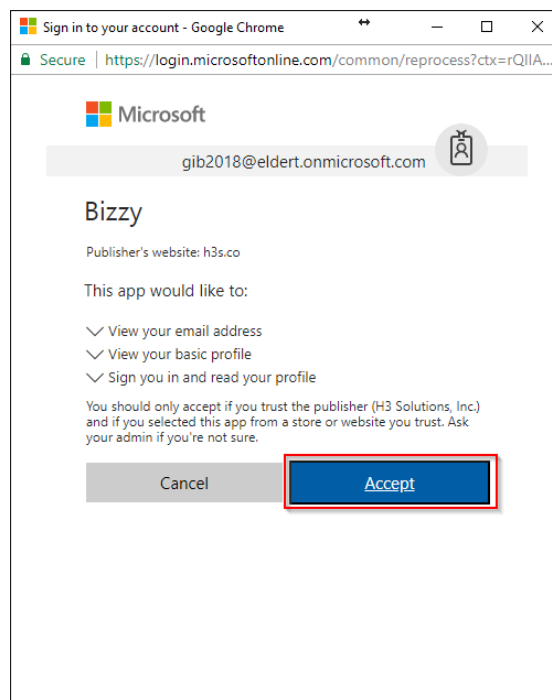# Create Flow

And finally, we will create a Flow which will be used to tie everything together.

Create a new flow from a blank template.

Give your flow a name, and add a Bizzy trigger.

Sign in using your Office 365 account and allow Bizzy to access your profile.
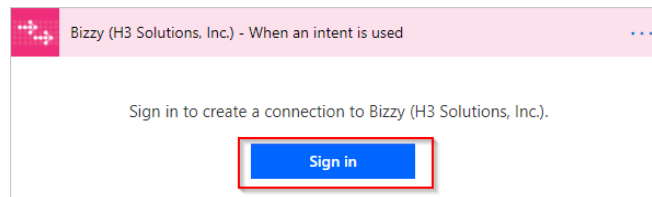
Give a description for your bot, and set the LUIS properties by using the key you wrote down earlier on.

When an intent is used *(Preview)*	ⓘ ···

* Trigger Description	Start expense claim
* Bot Trigger Type	Shared ⌄
Keywords	Enter custom keywords that will trigger the Flow.
LUIS API Key	13184▓▓▓▓▓▓▓▓▓d948f
LUIS App	ExpenseClaim ⌄
LUIS Intent	ClaimExpenses ⌄

Hide advanced options ⌃

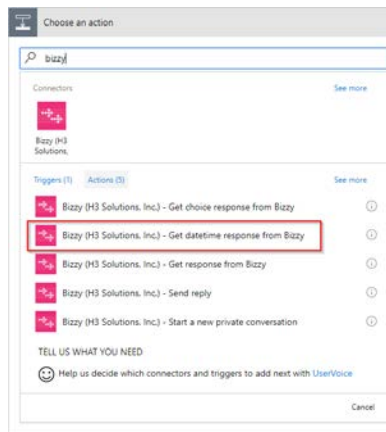Add an action to your flow, and set it to get a response from Bizzy, which will ask the user a question.
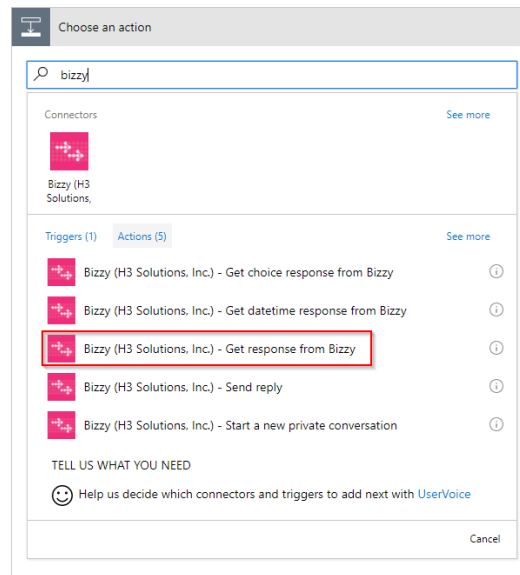
Set the message which will be sent to the user. The reply activity can be found in the properties of the trigger.
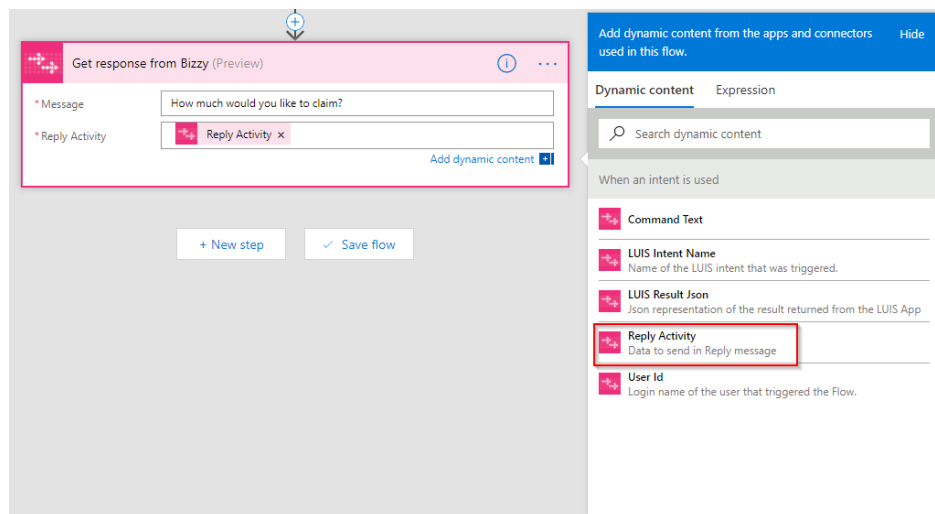
Add another step, which will get the date the expense was made.
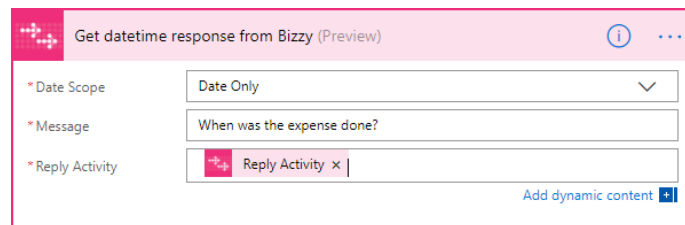
And another action which will get the type of expense.
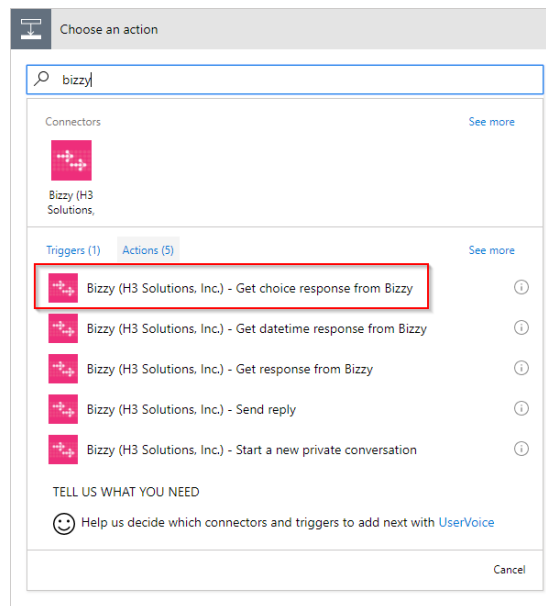
And to close the dialog with the user, we will now tell him his expense claim is created for approval.

And finally we will add a new item in our SharePoint list for this claim.
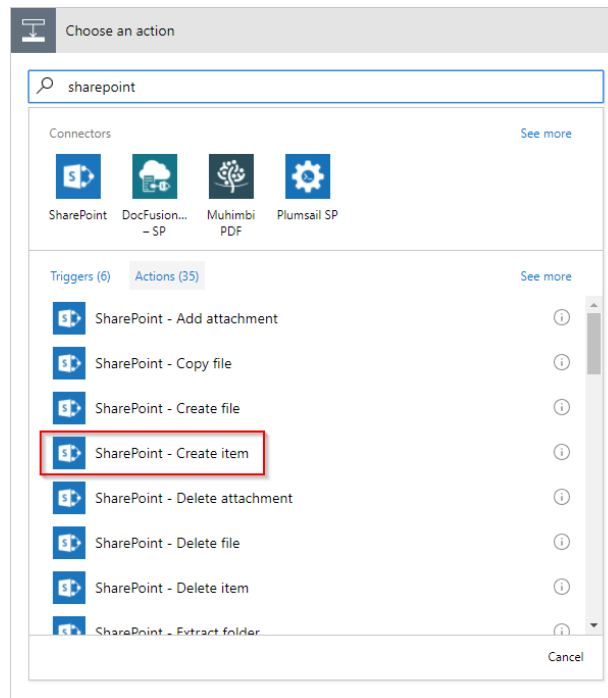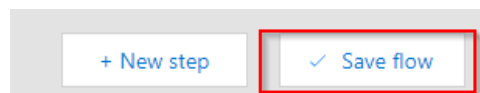
Test the solution

To test this solution, go to your Teams web app, and tell Bizzy you would like to claim your expenses. Note that you don't have to use this exact sentence, thanks to LUIS. Follow the conversation to claim the expenses.

And once it is done, check your SharePoint list, to notice the claim has been added.