

Creating a smart expense claims bot using Flow and Bizzy

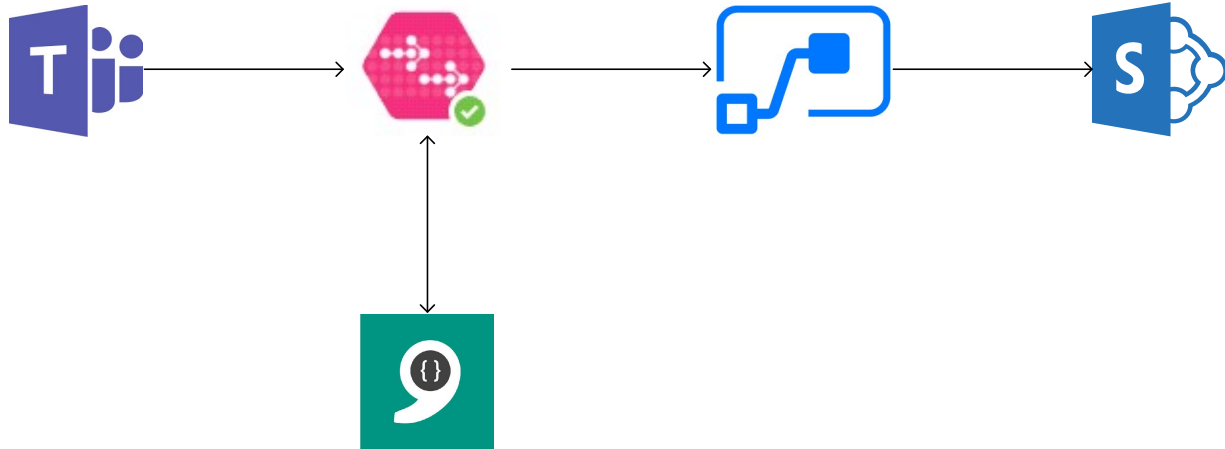
Eldert Grootenboer

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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.



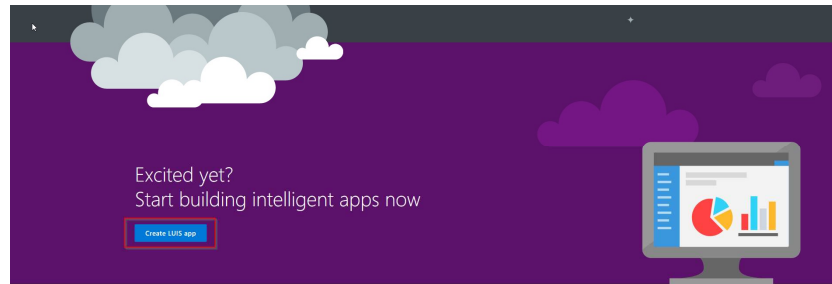
Prerequisites

- 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.



Welcome to the Language Understanding Intelligent Service (LUIS)!

Country (Required)

Netherlands

☐ Contact me with promotional offers and updates about Cognitive Services.

☒ I agree that this service is subject to the same terms under which I subscribe to Cognitive Services through Azure. If I do not subscribe to Cognitive Services through Azure, I agree that this service is subject to the Microsoft Online Subscription Agreement. In each case, the terms include the Online Services Terms. I acknowledge the Privacy & Cookies statement.

Continue

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 new app

Name (Required)

Culture (Required)

** Culture is the language that your app understands and speaks, not the interface language.

Description

Done Cancel

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

Intents

Create new intent Add prebuilt intent

Search intents

Name	Utterances
None	0

Create new intent

Intent name (Required)

Done Cancel

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.

ExpenseClaim (v0.0) DASHBOARD BUILD PUBLISH SETTINGS **Train** Test

App Assets

- Intents
- Entities
- Improve app performance
- Review endpoint utterances
- Phrase lists

ClaimExpenses

Type about 5 examples of what a user might say to trigger this task and hit Enter.

Search for an utterance

Reassign intent Delete utterance(s)

Filters: ☐ Errors ☒ Entity ☒ Entities view ☒ Fuzzy search

Utterance	Labeled intent
<input type="checkbox"/> please claim my expenses	ClaimExpenses -1
<input type="checkbox"/> I have expenses to claim	ClaimExpenses -1
<input type="checkbox"/> I want to claim my expenses	ClaimExpenses -1

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.

ExpenseClaim (V 0.1) ▾ DASHBOARD BUILD **PUBLISH** SETTINGS Train Test

Publish app

Published version: Slot not published yet
Published date: (Application not published)

Publish to

Production Timezone: (GMT) Western Europe Time, London, Lisbon, Casablanca

☒ Include all predicted intent scores
☐ Enable Bing spell checker

Publish to production slot

Resources and Keys

Add Key

☒ North America Regions ☐ South America Regions ☐ Europe Regions ☐ Asia Regions ☐ Australia Regions

Resource Name	Region	Key String	Endpoint
Starter_Key	westus	131841a17202415cbe173ac90b0940f	https://westus.api.cognitive.microsoft.com/luis/v2.0/apps/7e655be9-c3a1-43fd-8134-0c9ac6b6a1a8?subscription-key=131841a17202415cbe173ac90b0940f&verbose=true&timeZoneOffset=0&lg=en

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.

BIZZY™ HOME FEATURES KITS PRICING DOCS BLOG CONTACT ADMIN PORTAL

Bizzy Pricing

Bizzy is licensed per named user in. All pricing is in US dollars. Volume discounts start at 11 users. Try asking Bizzy for a price estimate

Free	Enterprise	Pro
Get started with Bizzy!	A comprehensive bot platform powered by the Bizzy engine, tailored to your organization.	Supercharge Bizzy with administrative tools and premium Flow actions.
Free	\$6.99 per user per month	\$3.99 per user per month
3 personal Skills per user*	10 personal Skills per user*	6 personal Skills per user*
6 shared Skills per tenant*	Unlimited shared Skills	Unlimited shared Skills
Add to Teams	Bizzy Admin Portal	Bizzy Admin Portal
	Permissions management	Permissions management
	Customized help dialogs	Customized help dialogs
	Premium Flow actions	Premium Flow actions
	Multiple branded Bizzy bots	Standard support
	QnA Maker Integration	
	Deploy to Teams and Web	
	Priority support	
	99% uptime SLA	

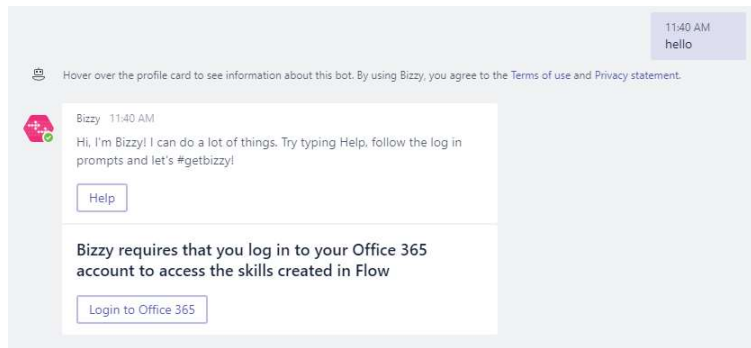
Launch the teams web app, to start working with Bizzy.

Launching Microsoft Teams

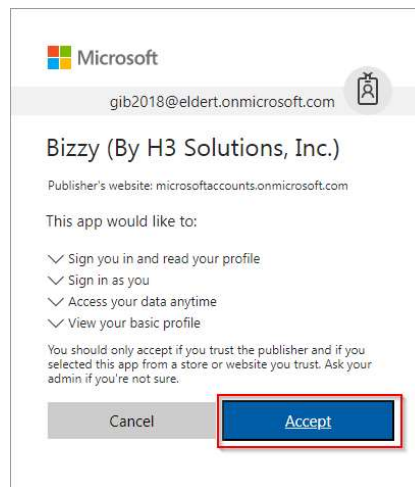
If the app doesn't open in a few seconds, try again. Or, head over to the web app.

Open web app Download

Say something to Bizzy to get to the login.

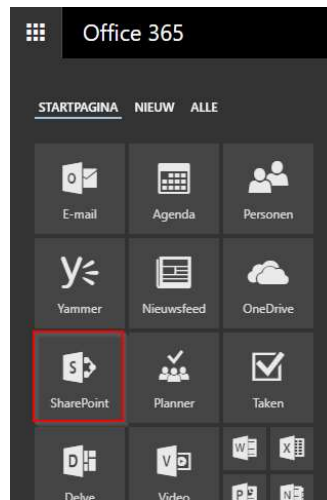


Sign in using your Office 365 account and allow Bizzy to access your profile.

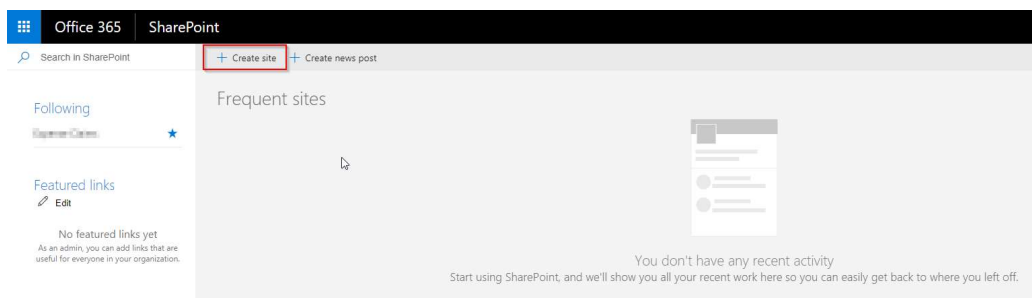


Create SharePoint list

We will be using [SharePoint](#) to store the expense claims.

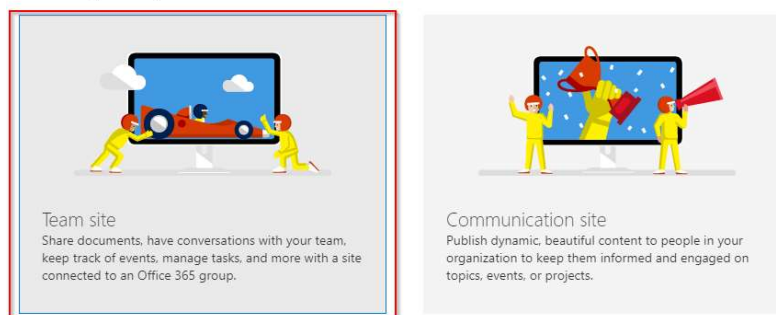


Create a new site, which will be used for this purpose.



Create a site

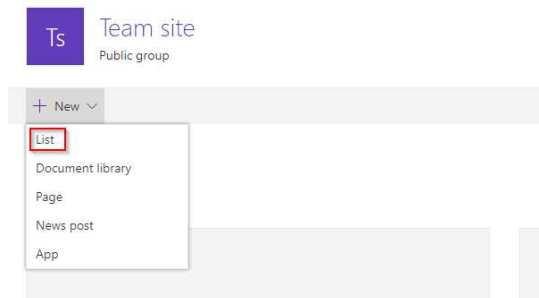
Choose the type of site you'd like to create



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

The screenshot shows the 'Create site' form in SharePoint. The 'Site name' field contains 'Expense Claim' with a green message 'The site name is available.' below it. The 'Group email address' field contains 'ExpenseClaim' with a green message 'The group alias is available.' below it. The 'Site Address' field contains 'https://eldert.sharepoint.com/sites/ExpenseClaim' and is highlighted with a red box. The 'Site description' field contains the placeholder text 'Tell people the purpose of this site'. The 'Privacy settings' dropdown is set to 'Public - anyone in the organization can access this site'. At the bottom, the 'Next' button is highlighted with a red box, and the 'Cancel' button is also visible.

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



This list will be used to hold and approve our expense claims.

The screenshot shows the 'Create list' form. The 'Name' field contains 'Claims'. The 'Description' field is empty. The 'Show in site navigation' checkbox is checked. The 'Create' button is highlighted with a red box, and the 'Cancel' button is also visible.

Add columns for the amount of expenses claimed and approval.

The screenshot shows the 'Expense Claim' form in Microsoft Dynamics 365. At the top, there's a header with 'EC Expense Claim' and 'Public group'. Below this is a navigation bar with options: '+ New', 'Quick edit', 'Export to Excel', 'Flow', 'PowerApps', and a menu icon. The main area is titled 'Claims' and shows a table with one column, 'Title'. A red arrow points to the '+' icon next to the table header, which has opened a dropdown menu. The menu lists various column types: 'Single line of text' (highlighted with a red box), 'Multiple lines of text', 'Number', 'Yes/No', 'Person', 'Date', 'Choice', 'Hyperlink', 'Picture', 'Currency', 'More...', and 'Show/hide columns'. To the right of the table, there's a message: 'There is nothing to show here. Click New to add items.' Below the table, there's an 'Edit column' section. It includes a link 'Learn more about column types and options.' and a form with the following fields: 'Name *' (containing 'Expenses Claimed'), 'Description' (empty), 'Type' (a dropdown menu set to 'Single line of text'), 'Default value' (containing '0'), and a checkbox 'Use calculated value' (unchecked). At the bottom of the 'Edit column' section, there's a 'More options' link and three buttons: 'Save' (highlighted with a red box), 'Cancel', and 'Delete'.

EC Expense Claim
Public group

+ New Quick edit Export to Excel Flow PowerApps ...

Claims

Title

Single line of text
Multiple lines of text
Number
Yes/No
Person
Date
Choice
Hyperlink
Picture
Currency
More...
Show/hide columns

There is nothing to show here
Click New to add items

Edit column

[Learn more about column types and options.](#)

Name *
Expenses Claimed

Description

Type
Single line of text

Default value
0

☐ Use calculated value ⓘ

[More options](#)

Save Cancel Delete

Create a column

[Learn more about column creation.](#)

Name *

Description

Type

Default value

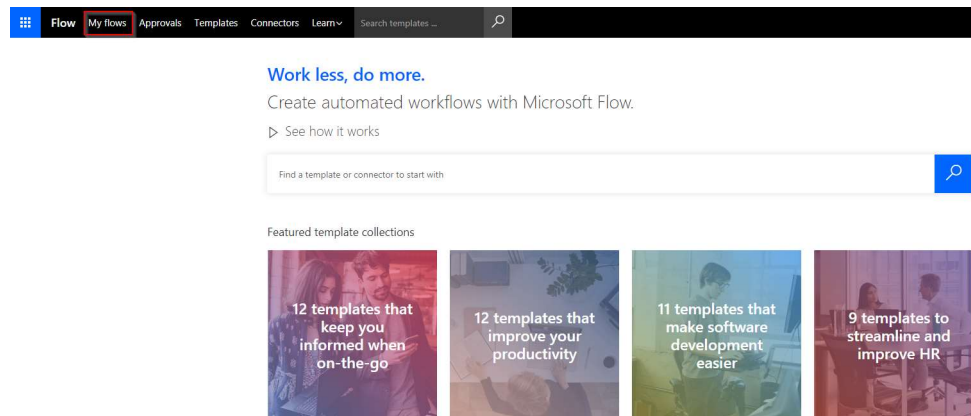
[More options](#)

Save

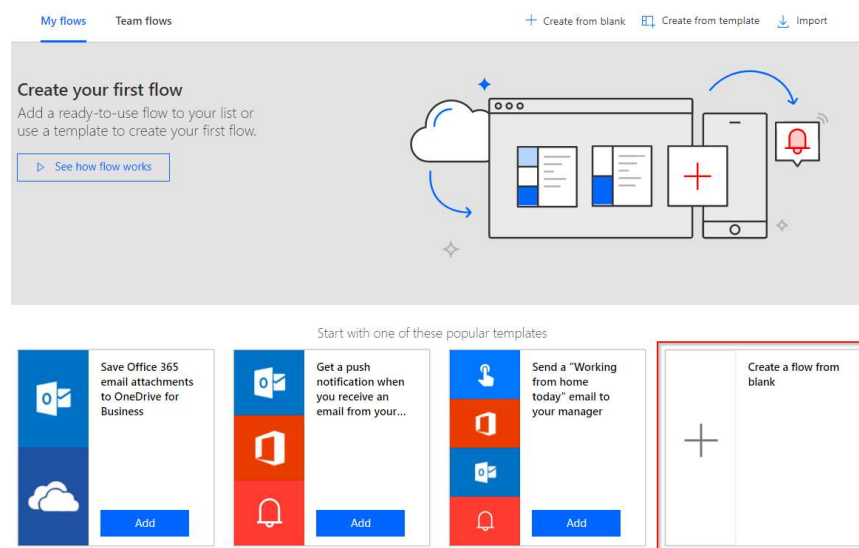
Cancel

Create Flow

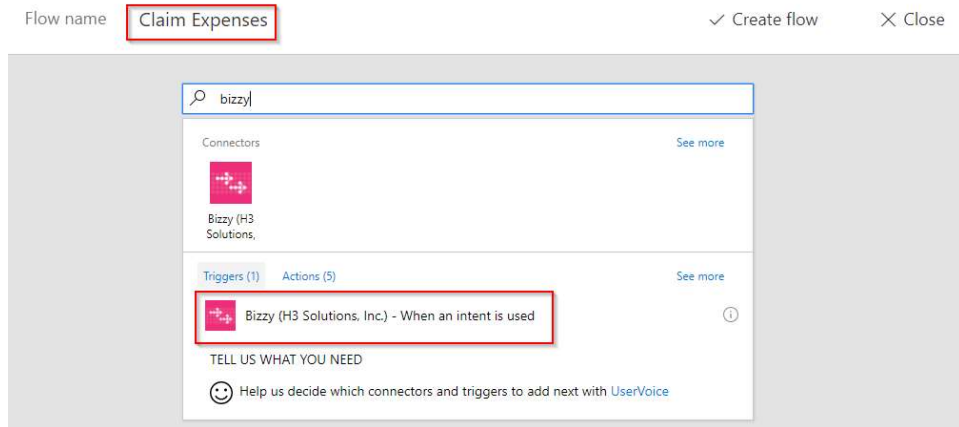
And finally, we will create a [Flow](#) which will be used to tie everything together.



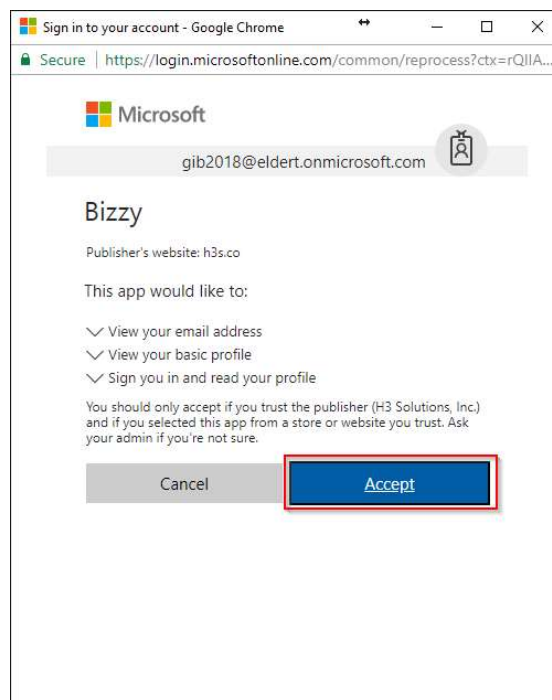
Create a new flow from a blank template.




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.



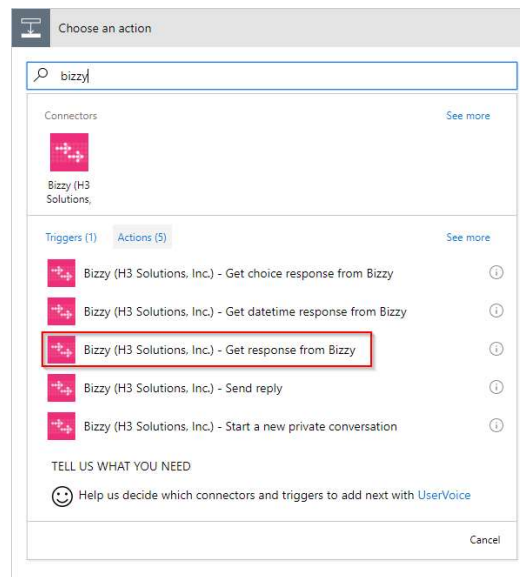
When an intent is used (Preview)

 ...

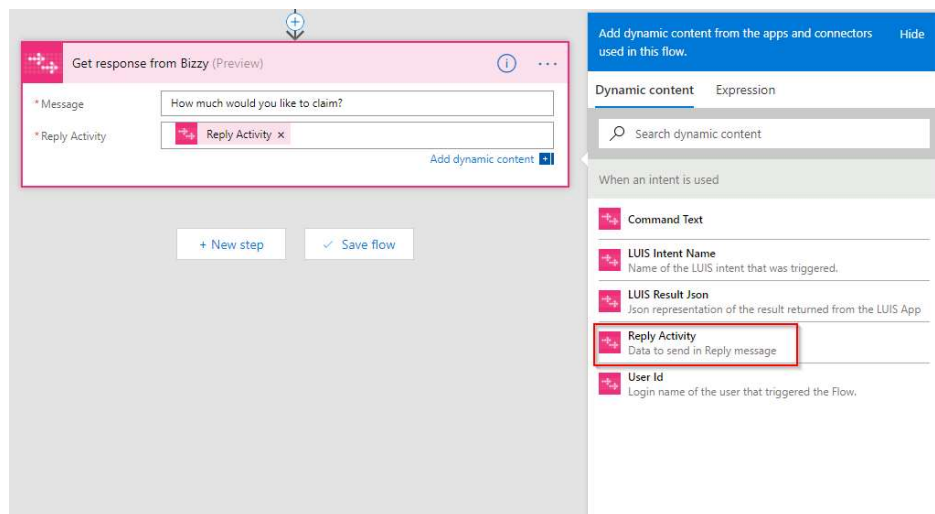
* Trigger Description	Start expense claim
* Bot Trigger Type	Shared
Keywords	Enter custom keywords that will trigger the Flow.
LUIS API Key	13184 [REDACTED] d948f
LUIS App	ExpenseClaim
LUIS Intent	ClaimExpenses

[Hide advanced options](#) ^

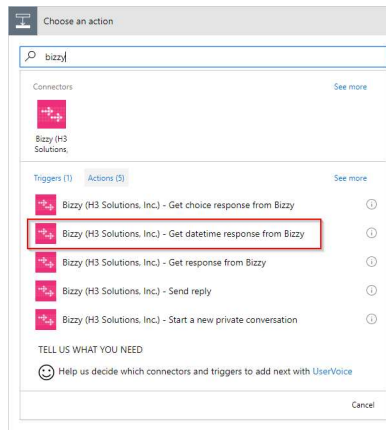
Add an action to your flow, and set it to get a response from Bizzy, which will ask the user a question.



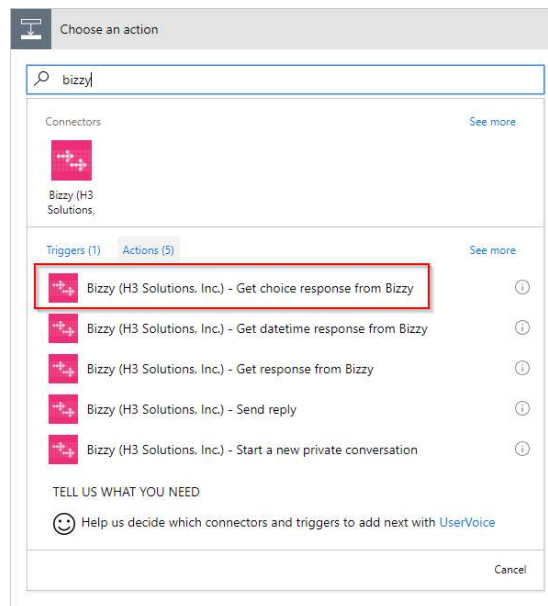
Set the message which will be sent to the user. The reply activity can be found in the properties of the trigger.



Add another step, which will get the date the expense was made.



And another action which will get the type of expense.



Get choice response from Bizzy (Preview)

* Message: What type of expense?

* Choice Values: Meal, Hotel, Other

* Reply Activity: Reply Activity x

[Add dynamic content](#)

And to close the dialog with the user, we will now tell him his expense claim is created for approval.

Choose an action

Search: bizzy

Connectors: [See more](#)

Bizzy (H3 Solutions, Inc.)

Triggers (1) | **Actions (5)** | [See more](#)

- Bizzy (H3 Solutions, Inc.) - Get choice response from Bizzy
- Bizzy (H3 Solutions, Inc.) - Get datetime response from Bizzy
- Bizzy (H3 Solutions, Inc.) - Get response from Bizzy
- Bizzy (H3 Solutions, Inc.) - Send reply**
- Bizzy (H3 Solutions, Inc.) - Start a new private conversation

TELL US WHAT YOU NEED

Help us decide which connectors and triggers to add next with [UserVoice](#)

[Cancel](#)

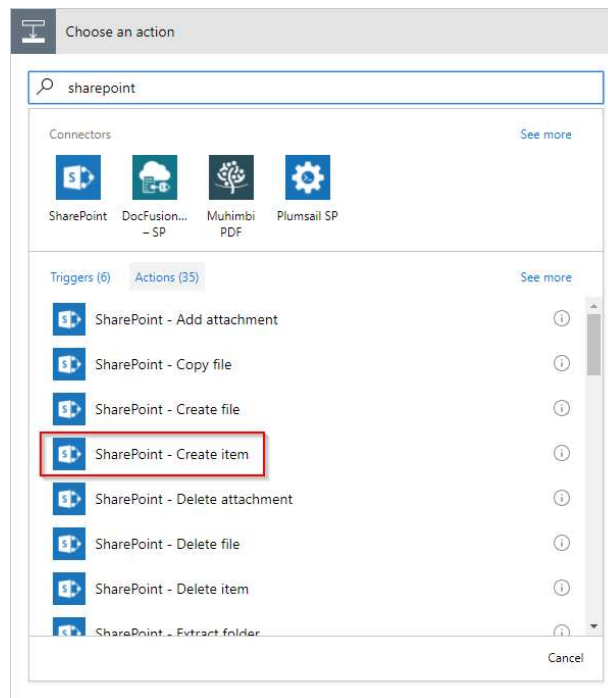
Send reply (Preview)

* Reply Text: Thank you, we will now place your claim for approval.

* Reply Activity: Reply Activity x

[Add dynamic content](#)

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



Create item

* Site Address

* List Name

* Title

Expenses Claimed

Approved

Add dynamic content

+ New step Save flow

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.

Bizzy 12:29 PM
How much would you like to claim?

Bizzy 12:29 PM
When was the expense done?

Bizzy 12:30 PM Updated
Date Confirmed!

Bizzy 12:30 PM Updated
Selection Confirmed!

Bizzy 12:30 PM
Thank you, we will now place your claim for approval.

12:29 PM
i would like to claim my expenses

12:29 PM
110

12:30 PM
10-02-2018

12:30 PM
Yes

12:30 PM
Hotel

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

EC Expense Claim Public group			
+ New Quick edit Export to Excel Flow PowerApps ...			
Claims			
Title	Expenses Claimed	Approved	
gib2018@eldert.onmicrosoft.com - 10/2/2018 - Hotel	110	No	