Microsoft

Robotic Process Automation in a Day

Lab 6 – Connect with API world. Use Outlook email to trigger desktop flows and pass input

30 mins

October 2021

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Lab Overview

You will complete the following tasks in this lab:

- Create a new Solution to package the end-to-end invoice processing solution
- Create a new Cloud flow that initiates the invoicing process via receipt of an email
- Integrate the Desktop flow from Lab 3 into the Cloud flow
- Perform a test run of the new Cloud flow

Prerequisites

This lab builds on top of previous labs – ensure these labs are complete.

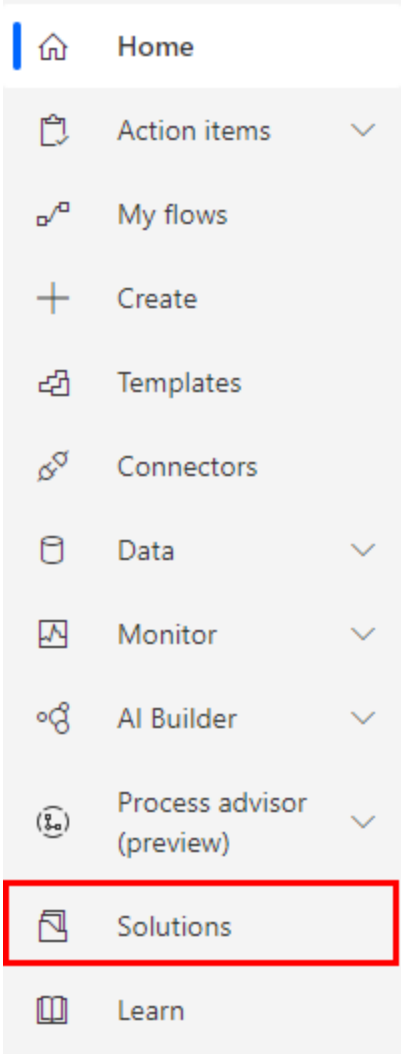
About Solutions

This lab introduces a concept called Solutions. Solutions are how customizers and developers author, package, and maintain units of software that extend Microsoft Dataverse. For example, Dynamics 365 for Sales, Marketing, Customer Service apps are composed of solutions. Customizers and developers distribute solutions so that organizations can use Microsoft Dataverse to install and uninstall the business functionality defined by the solution. For additional information about Solutions, please see the following link: https://docs.microsoft.com/en-us/powerapps/developer/common-data-service/introduction-solutions

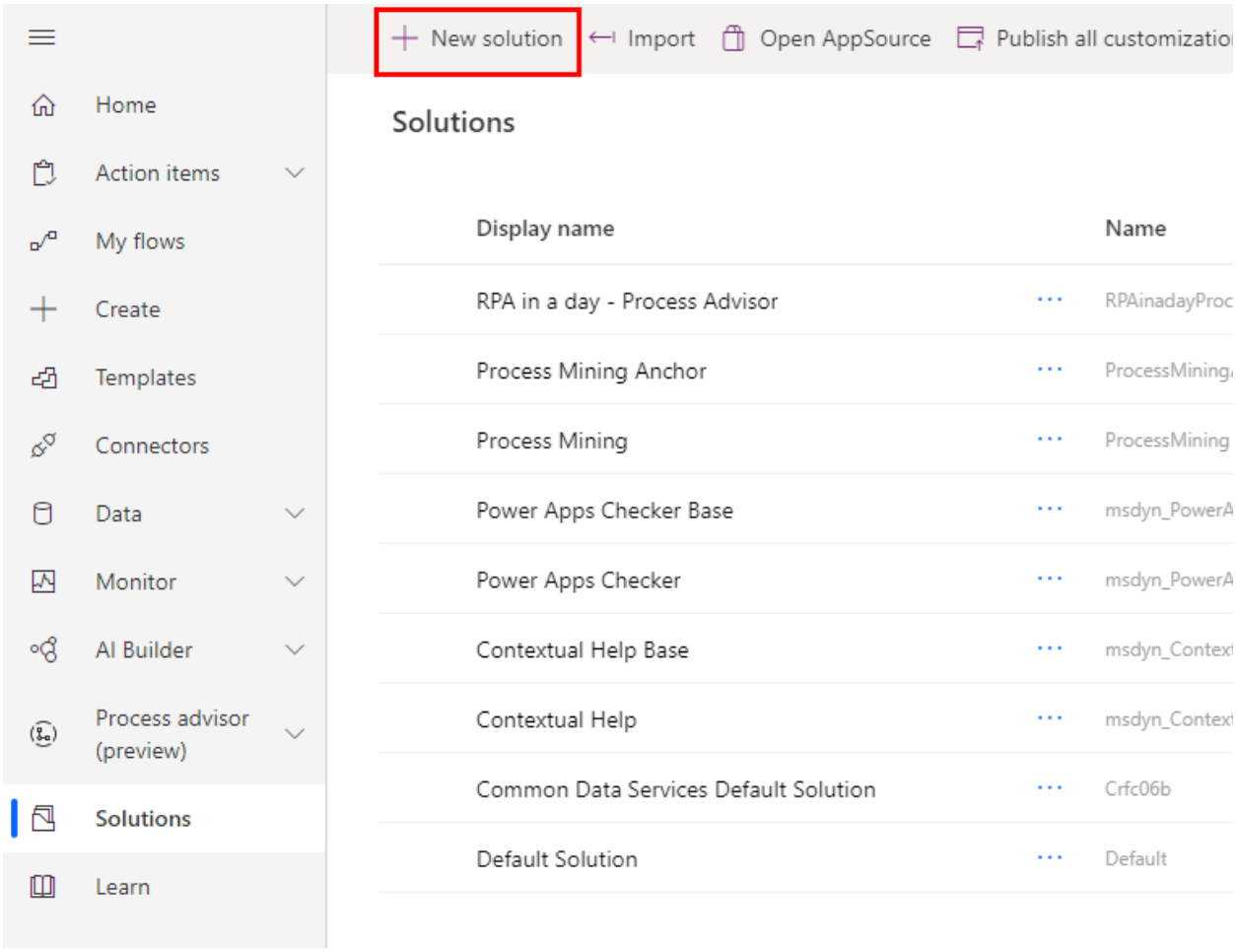
Connect with API world. Use Outlook email to trigger Desktop flow and pass input

1. Open the test profile in a browser and navigate to https://powerautomate.microsoft.com.
2. Select **Solutions** in the left menu.

Note: we are going to create our end-to-end cloud flow within a solution. The main reason that we must use solution is because the AI builder model in next lab #6 is only supported within a solution-based cloud flow.



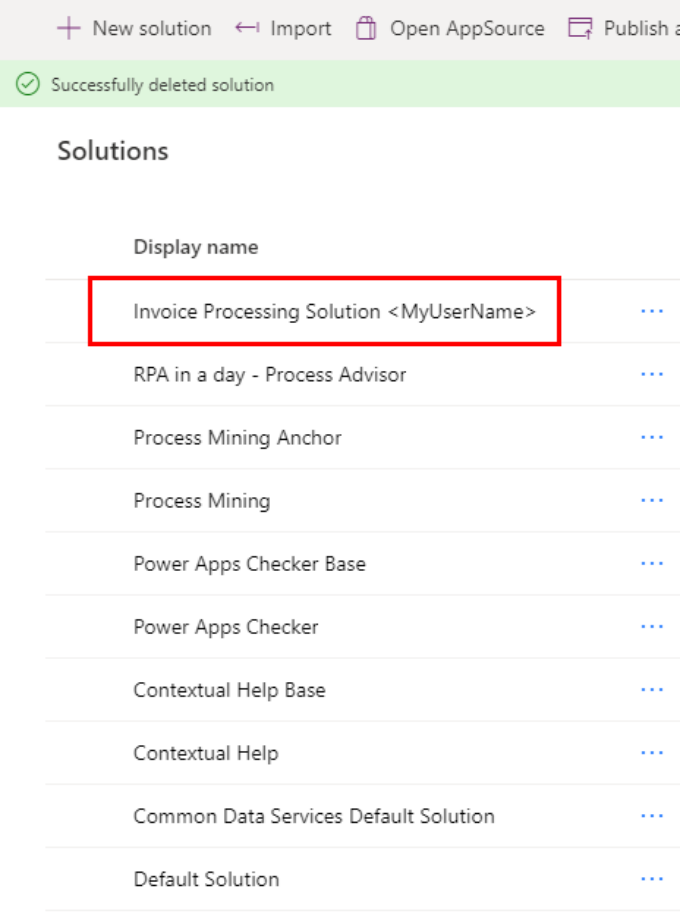
3. Click **+New solution.**



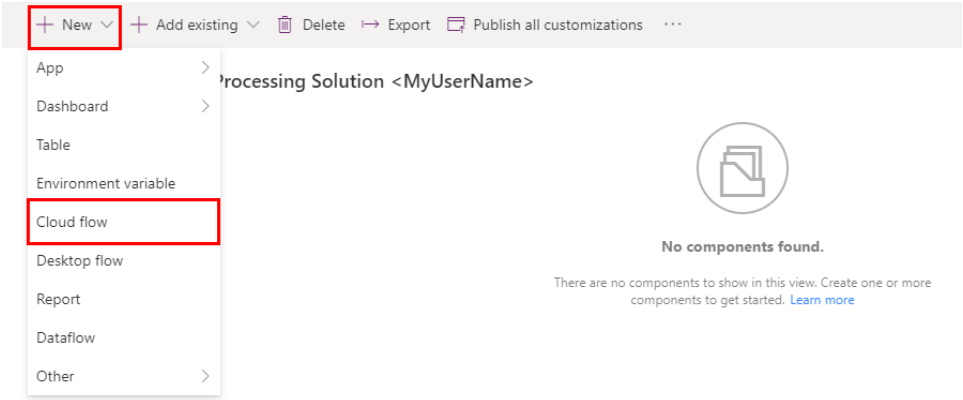
4. Name the solution **Invoice processing solution <MyUserName>**. Set **CDS Default Publisher** as Publisher. Then click **Create**.

Note: For the purposes of this lab, using the CDS Default Publisher is acceptable. For production scenarios, please refer to this link for additional information: https://docs.microsoft.com/en-us/power-platform/alm/solution-concepts-alm#solution-publisher

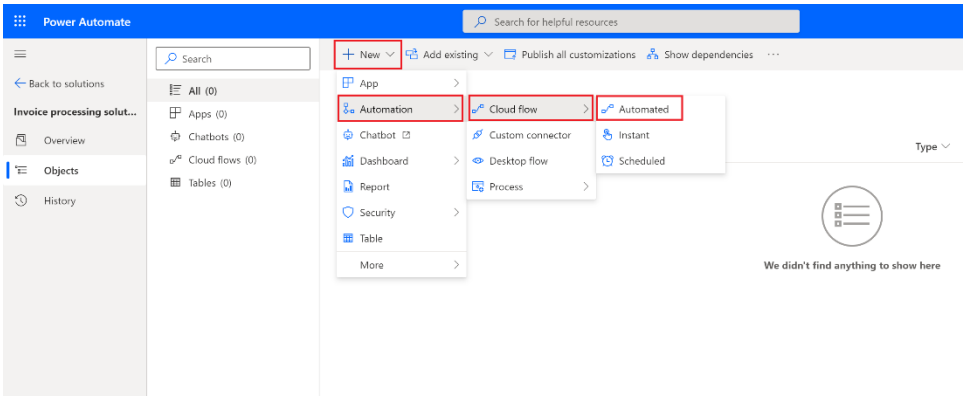
5. Open the new solution you just created by clicking on the name of the solution.



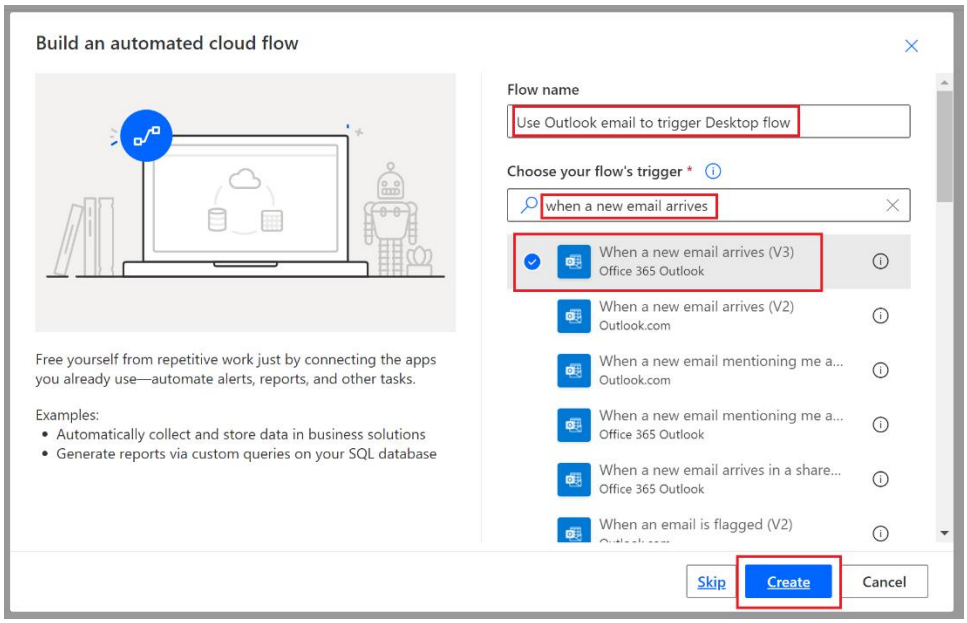
6. Click **+New** > **Cloud flow**



Note, you might be seeing the new solution explorer new interface instead of the traditional view above. In that case, you can still click +New -> Automation -> Cloud flow -> Automated menu to create a new cloud flow.

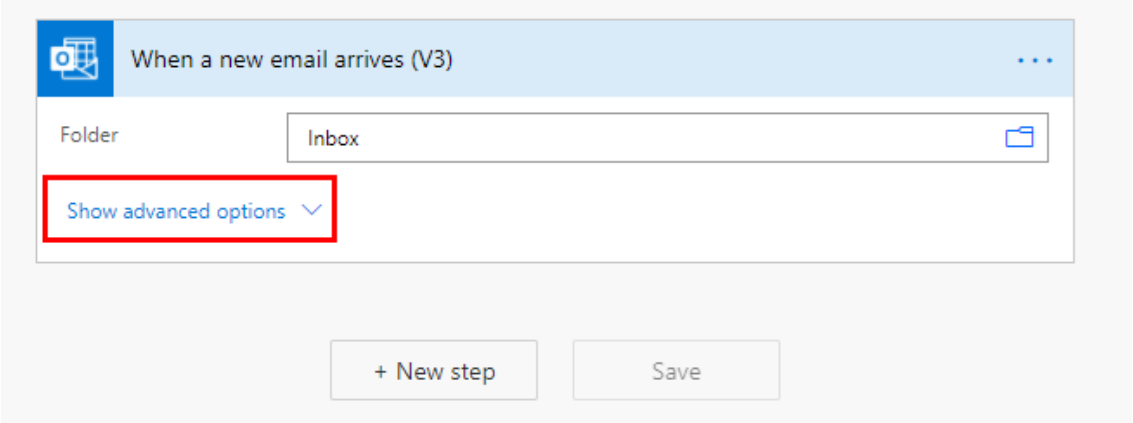


7. Name your new flow **Use Outlook email to trigger Desktop flow** and select **when a new email arrives (V3)** as the trigger event then click **Create** button

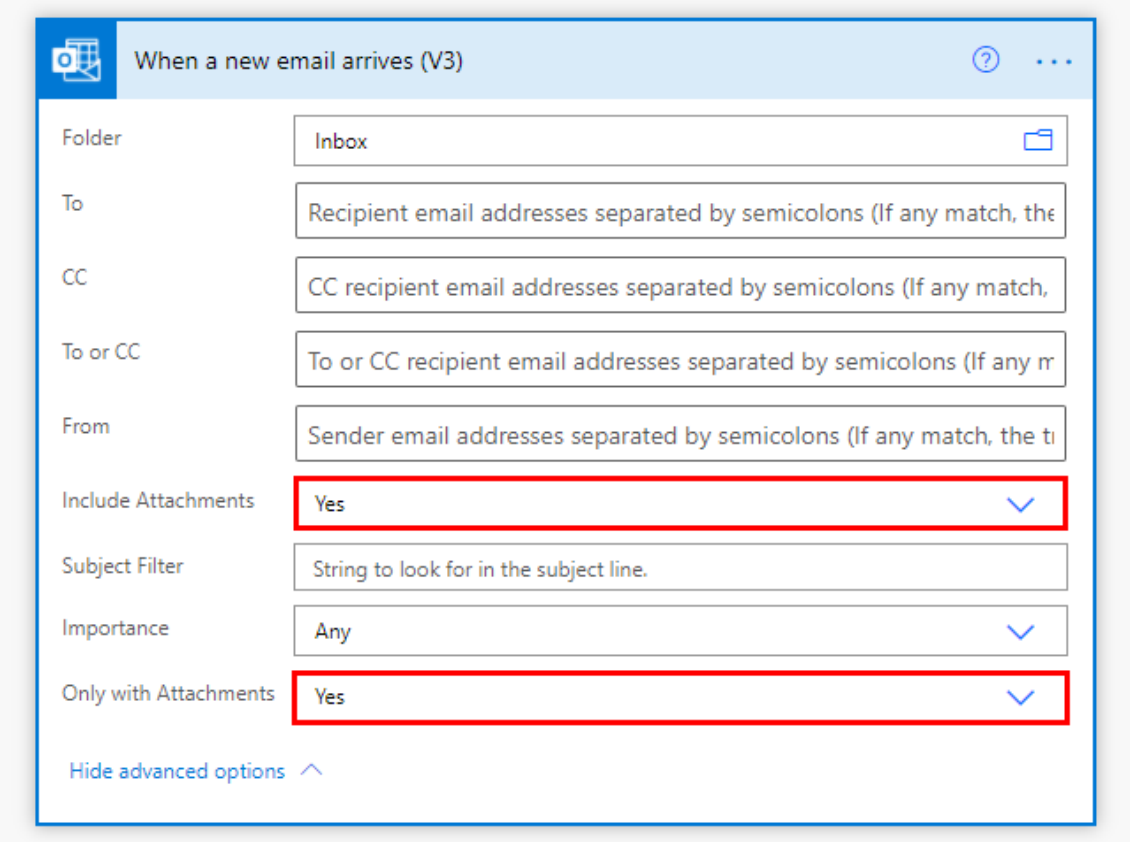


8. You will be in the flow designer now. Sign in with your Outlook account.
9. In the trigger card of **When a new email arrives (V3)**, click **Show advanced options.**

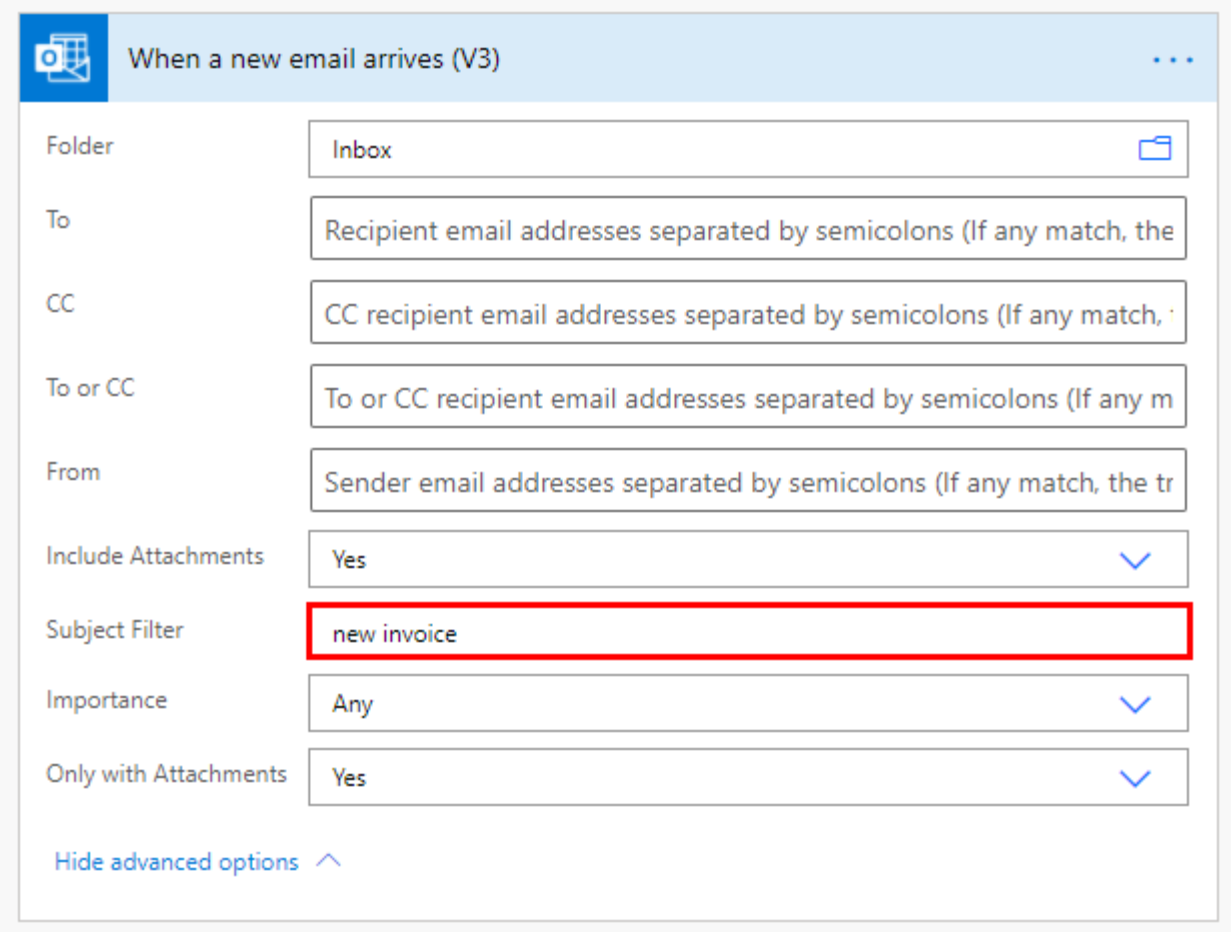
Note: You can check your connection by clicking the ellipsis icon (...) on the top right corner of the box.



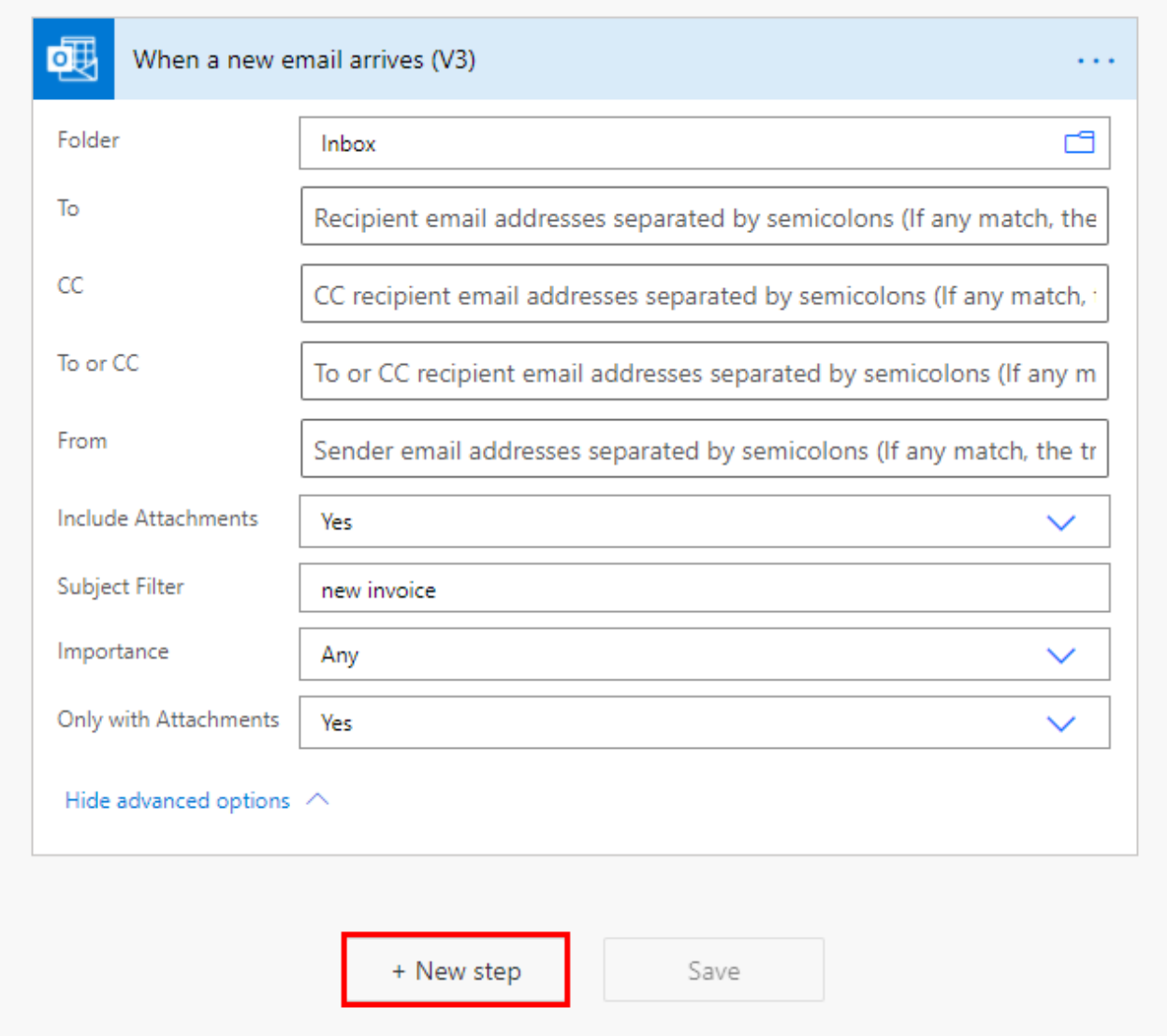
10. Select **Yes** for **Include Attachments** and **Has Attachment or Only with Attachments** (depends on the version of the Outlook connector)



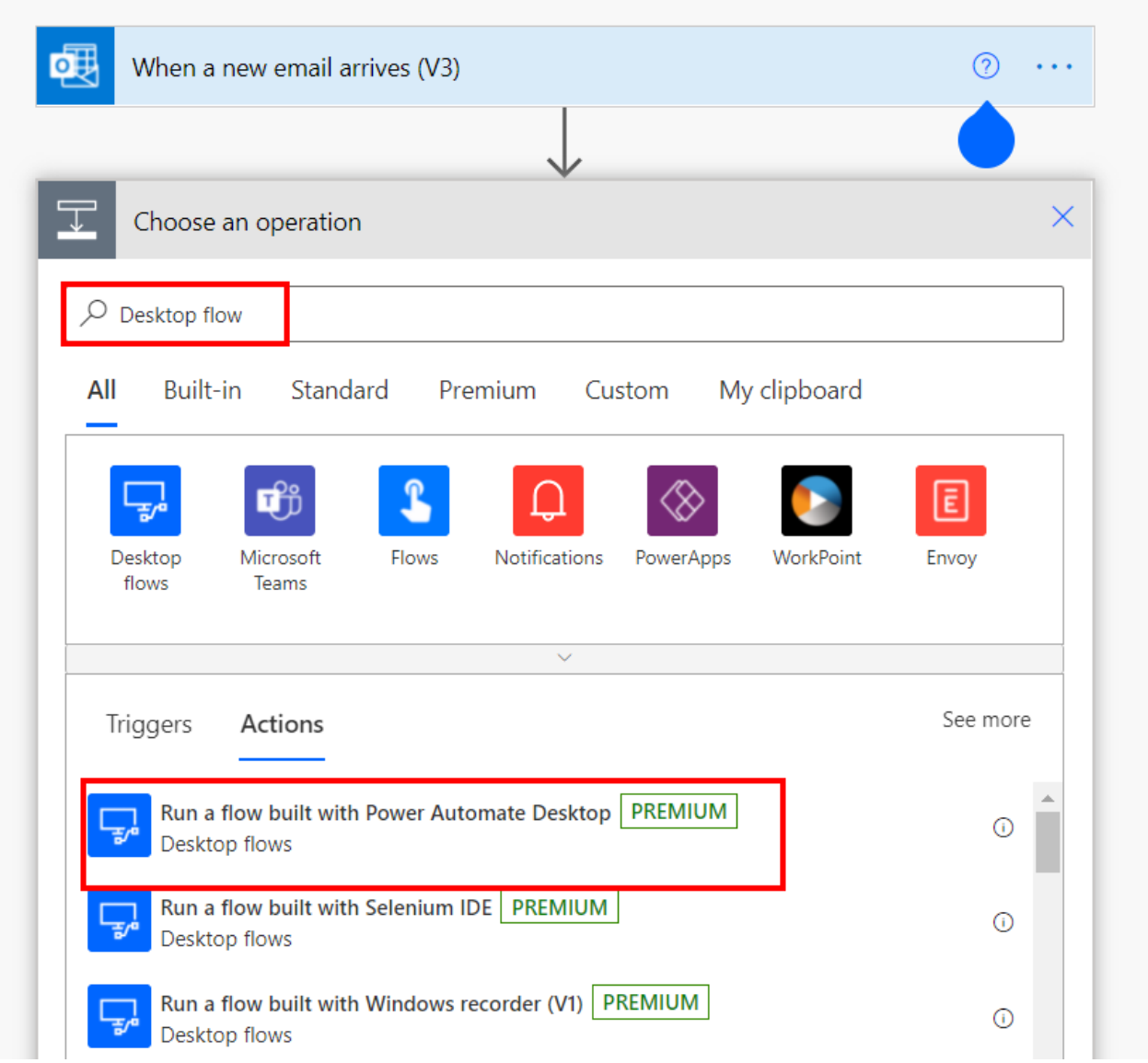
11. Enter **new invoice** in **Subject Filter** box.



12. Click **+New step.**


When a new email arrives (V3)
Folder
Inbox
To
Recipient email addresses separated by semicolons (If any match, the
CC
CC recipient email addresses separated by semicolons (If any match,
To or CC
To or CC recipient email addresses separated by semicolons (If any m
From
Sender email addresses separated by semicolons (If any match, the tr
Include Attachments
Yes
Subject Filter
new invoice
Importance
Any
Only with Attachments
Yes
Hide advanced options
+ New step
Save

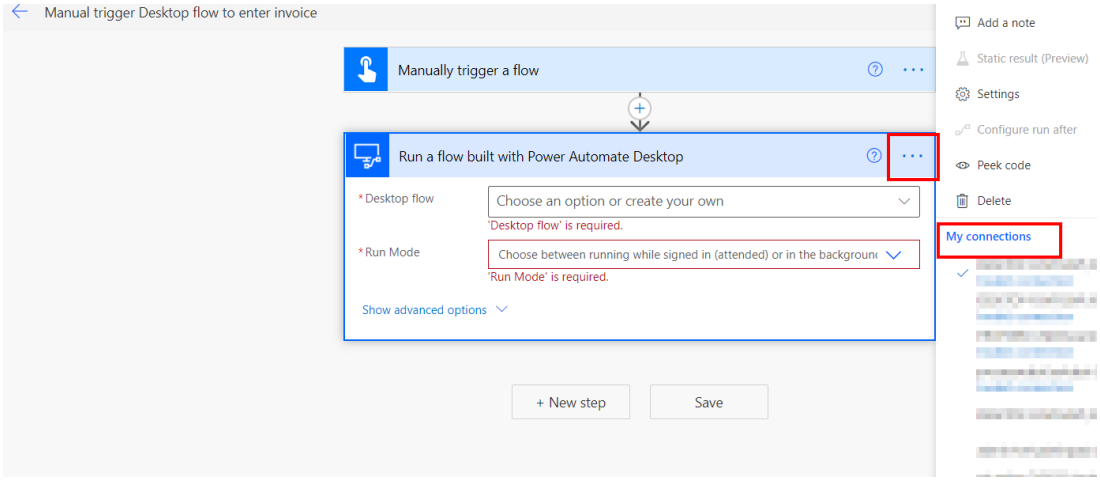
13. Search for **Desktop flow** in the search bar and select **Run a flow built with Power Automate Desktop.**



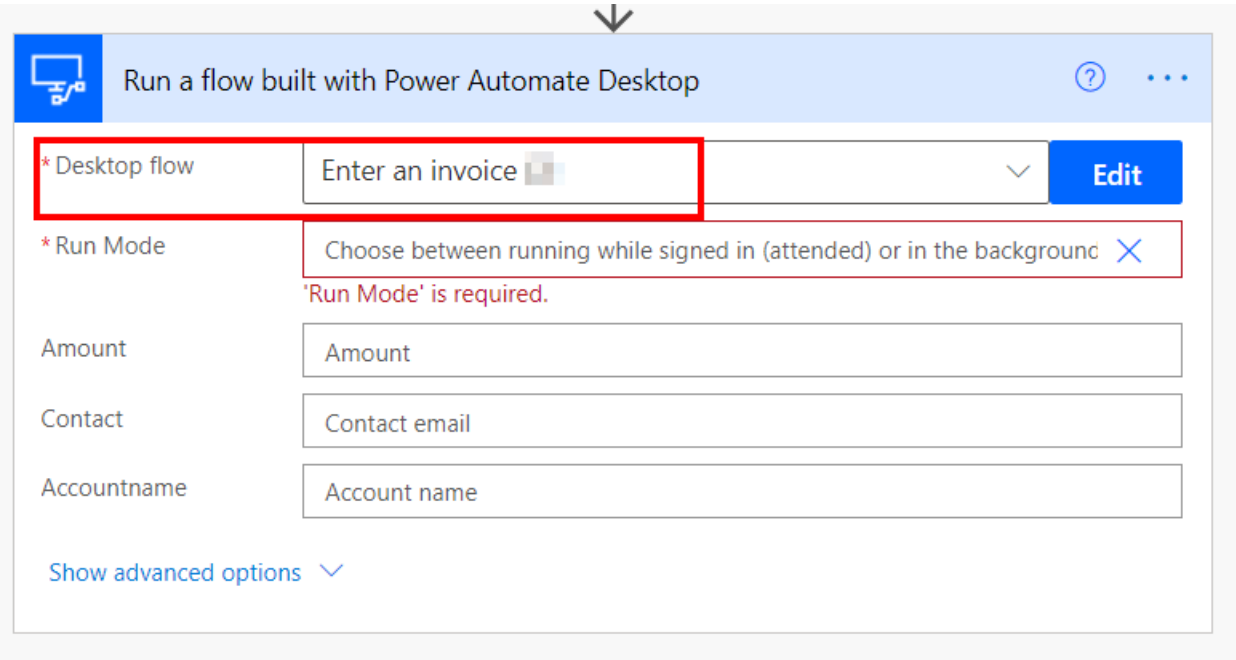
Note: You may receive a prompt to create a new connection because of building an API flow inside of a solution. Please use the same information that you used when creating connections in previous labs

14. Select the machine connection you have created. You don't need to select the connection if it is automatically connected for you.

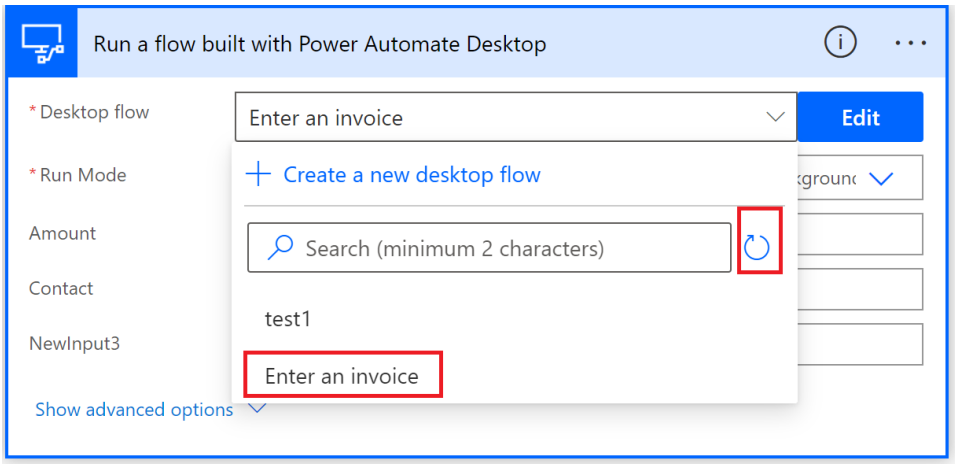
Important: If you do not see any existing connection but were asked to create new connection, please refer to steps described in Lab #5 for instructions how to do it.



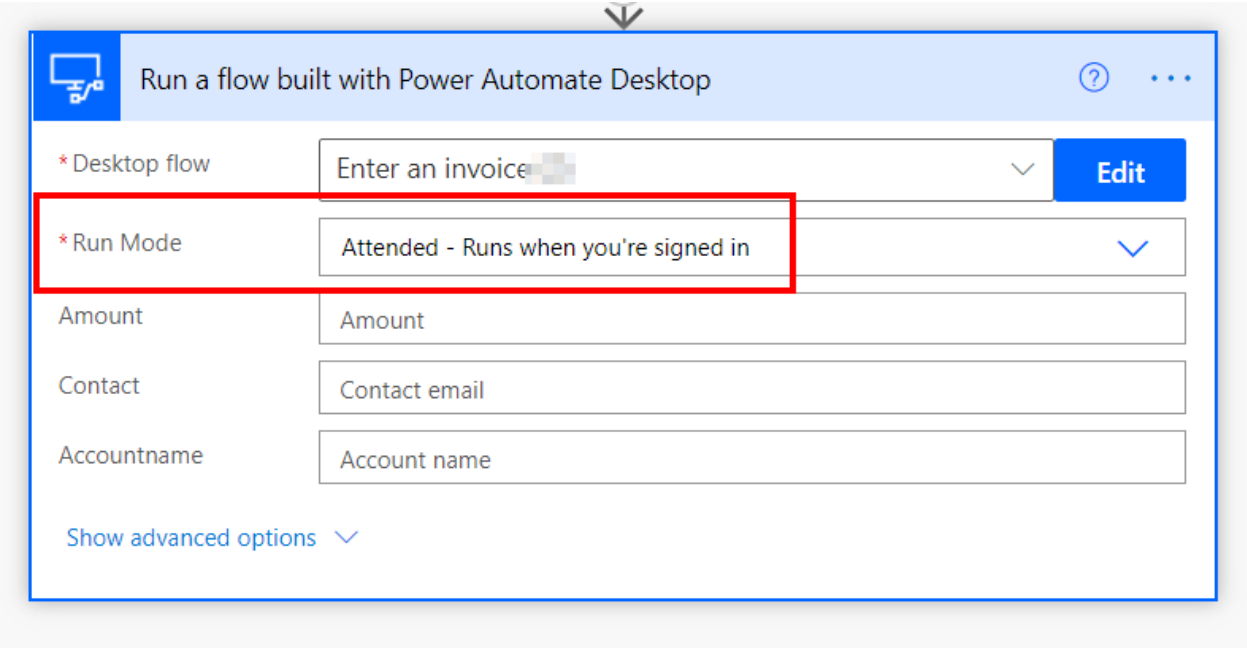
15. After you selected or created the desktop flow connection, under Desktop flow dropdown list, find and select the desktop flow that we have created earlier: **Enter an invoice**.



Note, if you did not see the name of newly created desktop flows in the dropdown list, you can click the refresh icon next to the search textbox to refresh the list.

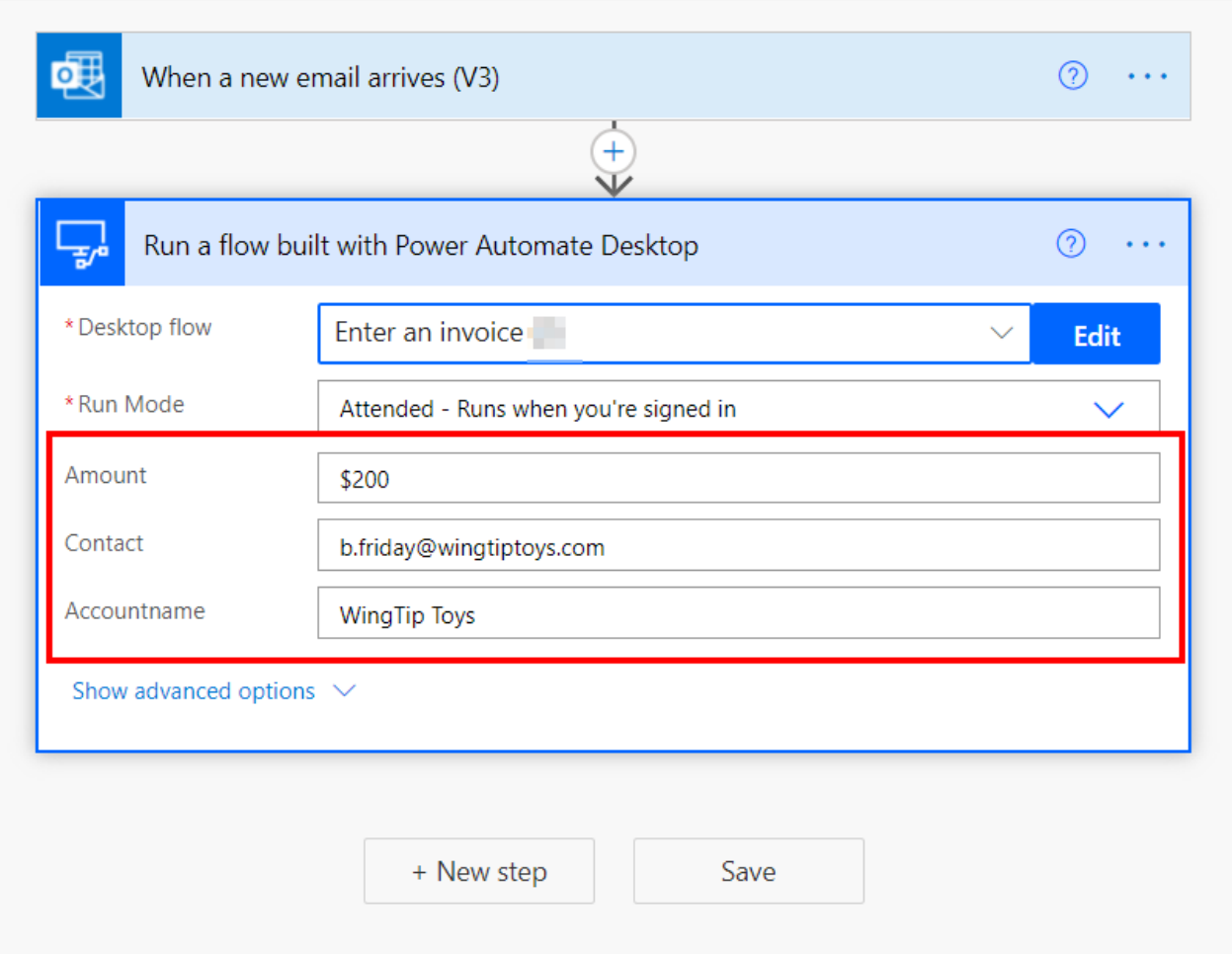


16. Under **Run Mode**, select **Attended – Runs when you're signed in**.

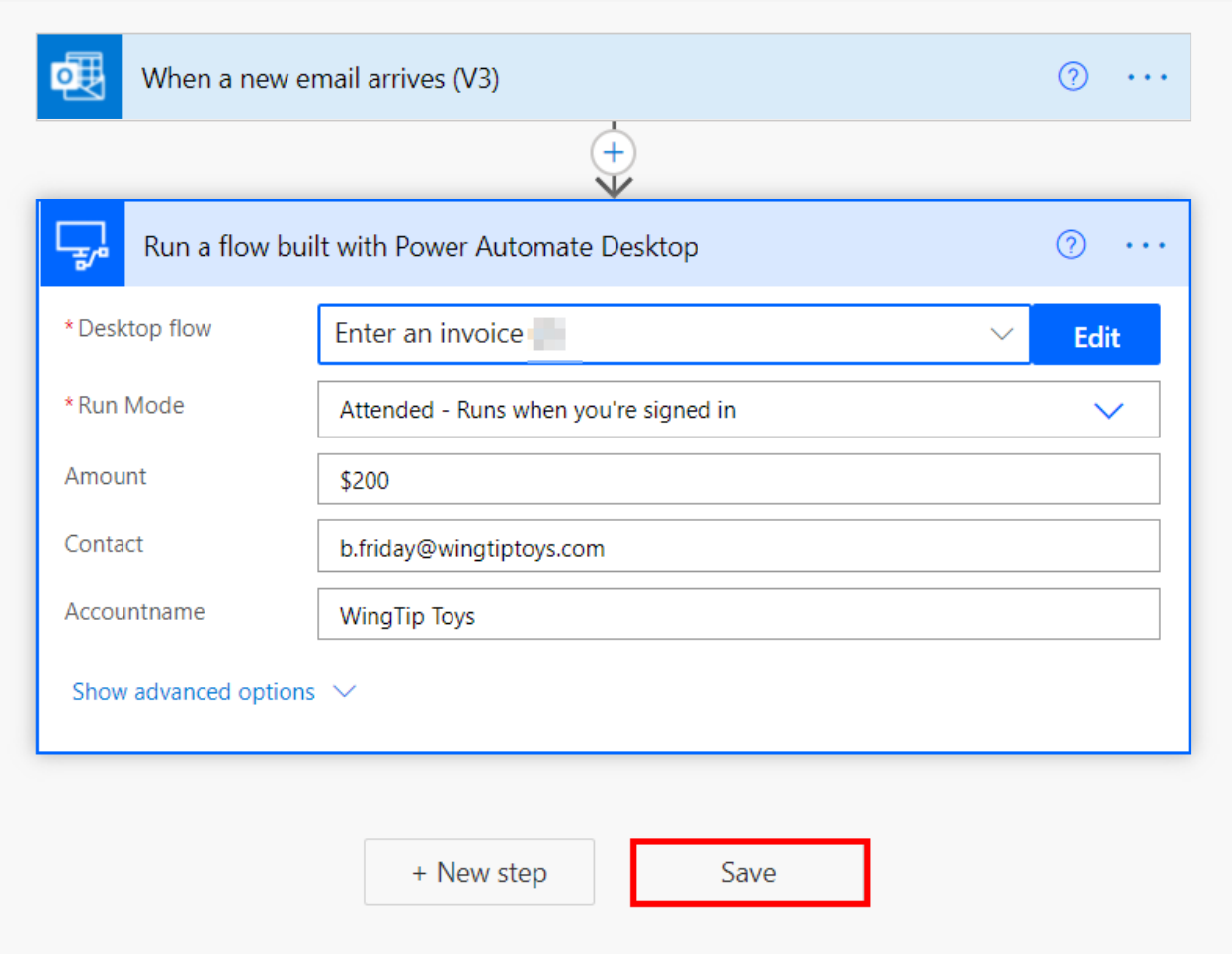

Run a flow built with Power Automate Desktop
* Desktop flow
Enter an invoice
Edit
* Run Mode
Attended - Runs when you're signed in
Amount
Amount
Contact
Contact email
Accountname
Account name
Show advanced options

17. Fill the box with these string values: (Note, we will switch in later labs to use Dynamics input values. But for now, we will use static values)

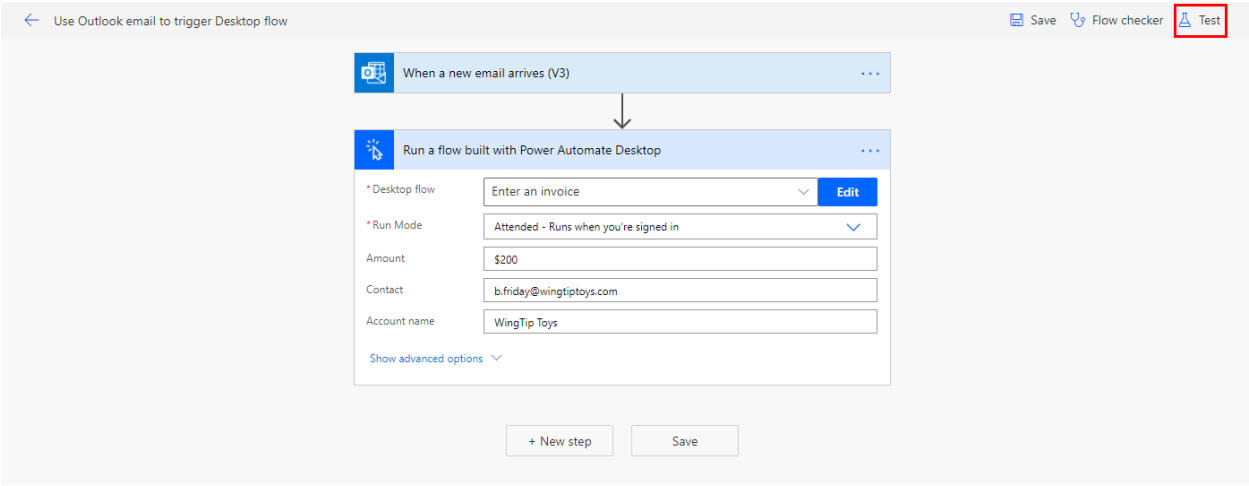
- **Amount**: $200
- **Contact:** b.friday@wingtiptoys.com
- **Account name:** WingTip Toys

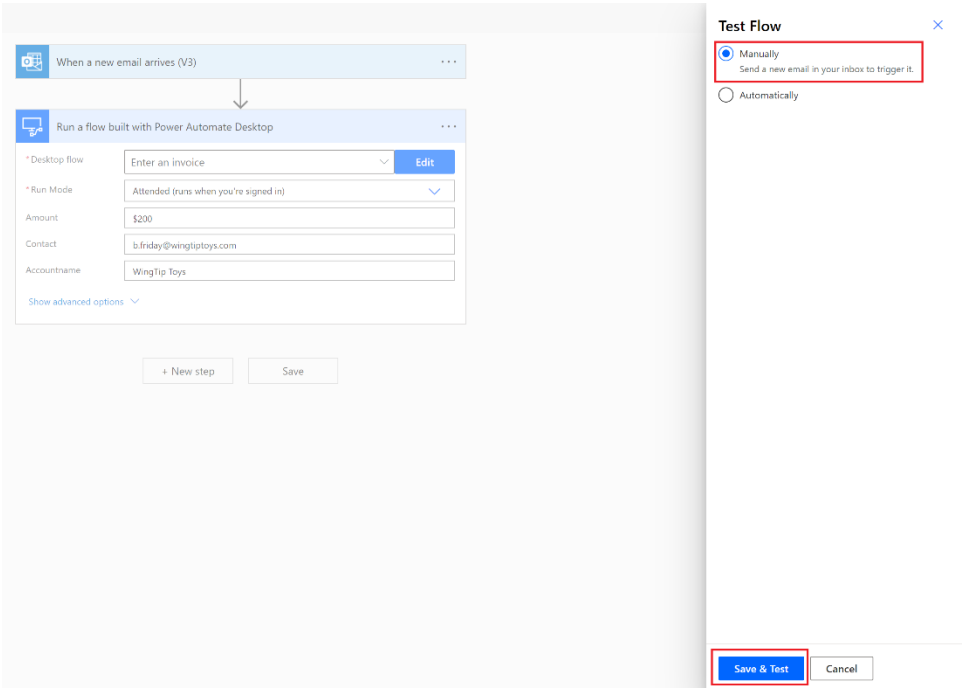


18. **Save** the flow.

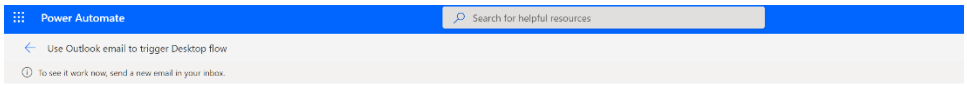


19. Test the flow by clicking **Test**. Then select **Manually** option and click **Save and Test** button.

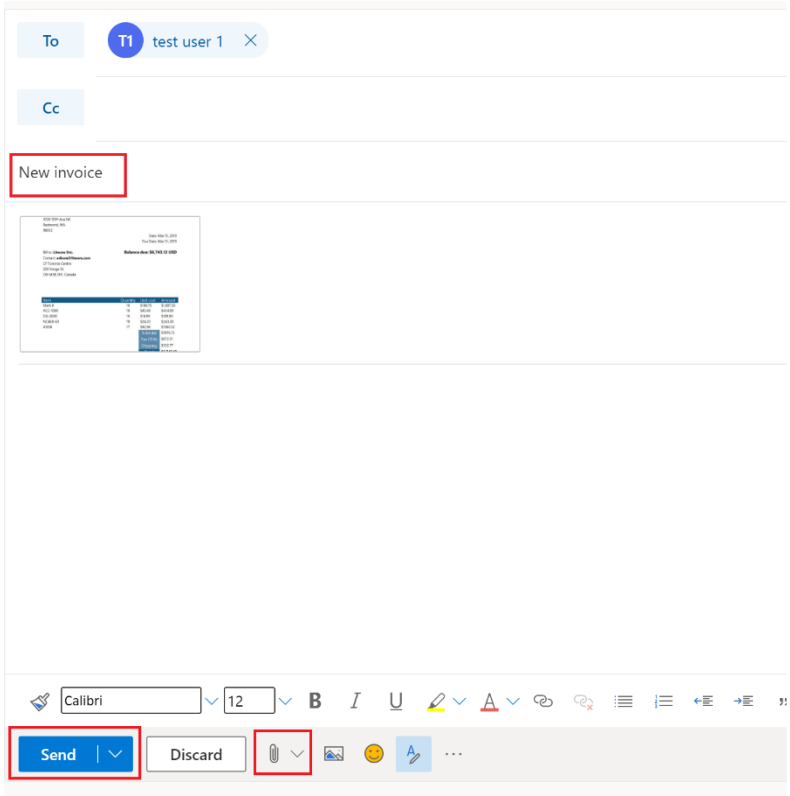




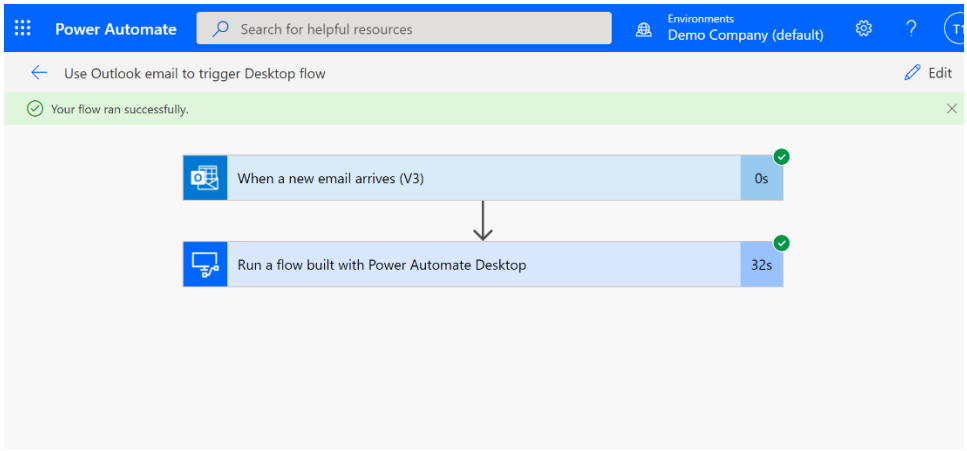
20. You will see an flow run history page which is empty. Since this flow has a trigger, the flow will run automatically if that trigger condition happens (when a new email arrives).



21. Now open an email app to draft an email to send to the inbox of the account that your trigger action is monitoring (which is the account you used to sign in when creating the trigger connection). In the email body, add the newinvoice.jpg file as **attachment (you can find this jpg file under the lab data package folder)** and enter **New invoice** in the email title. Click **Send** to test out this flow.



22. Once the email is received by the inbox that your flow trigger is monitoring, it will trigger the flow run automatically. Go back to the flow run history page, you will see that your flow should run successfully and launch the desktop flow on your computer as well.



Note: Sometimes, in demo instances, emails may be blocked due to spam concerns. If you receive an error sending an email, please try to send it from another account and be sure to include the attachment and correct Subject line.

Check your knowledge

Lab 6

5 mins

1. Using Solutions to manage your flows is a best practice, but what is the reason we must use solution in this lab? Is it because the AI builder model in the next lab will only be supported within solution-based flow?

   A. True
   B. False

   Answer: A. True, calling an AI Builder model requires the use of a solution-aware flow.

2. How do you check your Outlook connection after signing into your outlook account in this lab to ensure you are using the right account?

   A. Open your Outlook manually
   B. Click Show advanced options
   C. Click the outlook icon in cloud flow
   D. Click the ellipsis icon (…) on the top right corner of the box

   Answer: D. Click the ellipsis icon (…) on the top right corner of the box. Here you will see the email address that was used to create the connection.

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