GETAWAY PVT LTD

My First Real Life Project

NAME- SHITAL

NALAWADE

EMP ID- 2100669

COHORT CODE:- CDB21DX089

GETAWAY

MFRP Document

NAME : SHITAL NALAWADE
EMP ID : 2100669
CDB21DX089

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Problem Statement REQUIREMENTS:

1. Administrator – Should be able to add/edit/delete lists

2. Sales Manager/Sales Users – Should be able to add/edit/delete records in all the Sales system lists Will have read/write access to Vendor, Products and Orders list.

3. Sales User should be able to search orders in the system List Design:
Create following SharePoint lists in the site with the given columns:

a. Vendors (List 1)

i. Vendor ID
ii. Vendor Name
iii. Vendor Email

b. Products (List 2)

i. Product ID
ii. Product Name
iii. Unit Price
iv. Expiry date
v. Product Type

c. Orders (List 3)

i. Order ID
ii. Vendor ID
iii. Product ID
iv. Units Sold
v. Unit Price
vi. Sale Value
vii. Order Status (Approved, Rejected, Completed)

DESIGN CONSIDERATIONS

1. Create a Site Collection and Team Site for Sales Portal

2. Design the Homepage with customization with Header & Footer

3. Configure Navigation – Both Top Navigation & Quick Launch Navigation as required, add appropriate links to navigate to Sales Order Form, Product, Vendor & Order Lists, Report

4. Build a SPFx webpart with ReactJS UI to make the order entries which will have the following UI fields with Header and Footer

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5.Vendor Name: (Dropdown list which gets data from vendor list)

6. Product Name: (Dropdown list which will display all the products)

7. Product Type – Auto populate based on selected product

8. Product Expiry date – Auto populate based on selected product

9. Product Unit value – Auto populate based on selected product

10. Number of Units – Textbox that accepts only numeric values

11. Sale value – Calculated based on Number of Units X Unit value

12. Add Button – To add the order to Orders list

13. Edit Button – To edit the orders by passing Order ID

14. Delete Button – To Delete Orders by passing Order ID

15. Reset Button – To Clear all values after Insert, update operations

16. OOB Custom Views – Based on Order status approved, Order status rejected, Sales Value > 100000

17. Create 2 security groups in the site

    19.1. Administrator – Should be able to add/edit/delete records in all the lists

    19.2. Sales User – Will have read access to vendor and Product, Contribution access to Orders list

    19. Send mail to Sales users using Flow (Power Automate)

    20.1. Send mail to Sales Manager, Vendor EMail for each Sales order (Invoice Format)

    20.2. Approval for Sales order value more than 1,00,000, update the status in orders list as Approved, point 1 send invoice and update status as completed.

    20.3. Generate summary report of monthly sales in excel format.

REQUIREMENTS

1. Create a Team Site for Sales Portal

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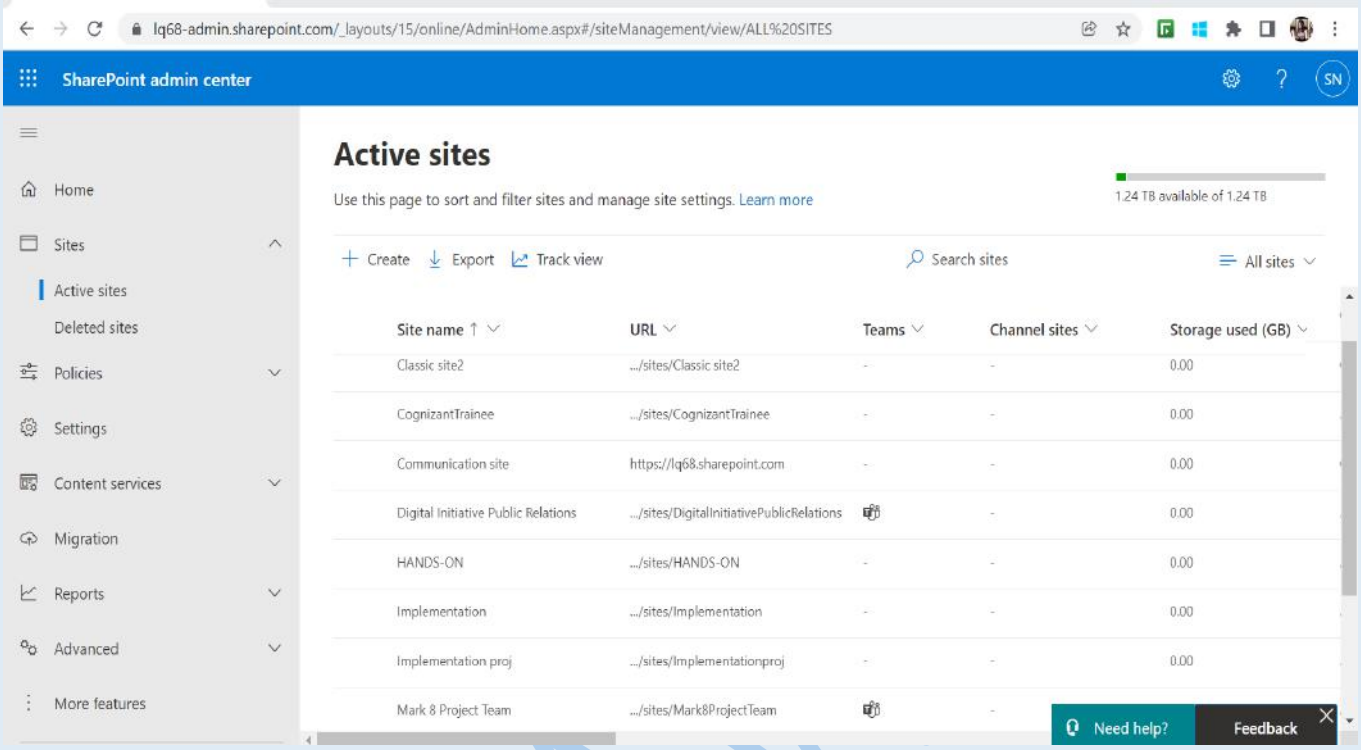
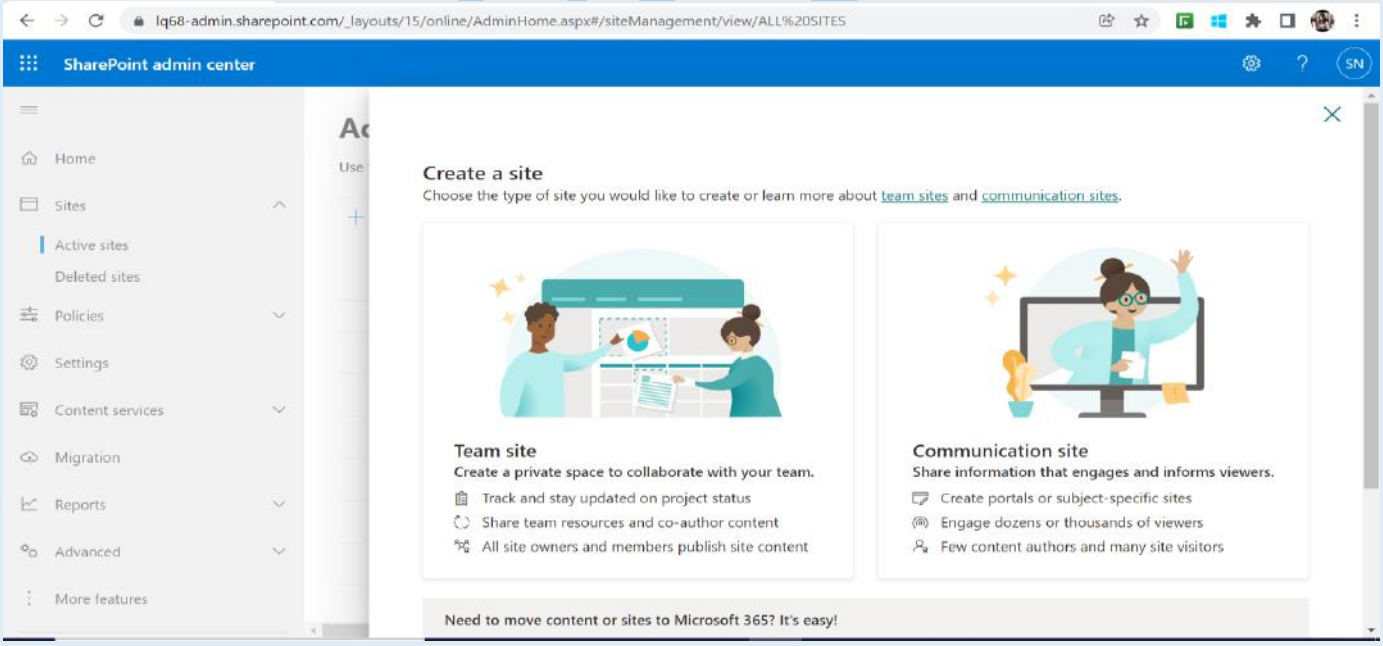
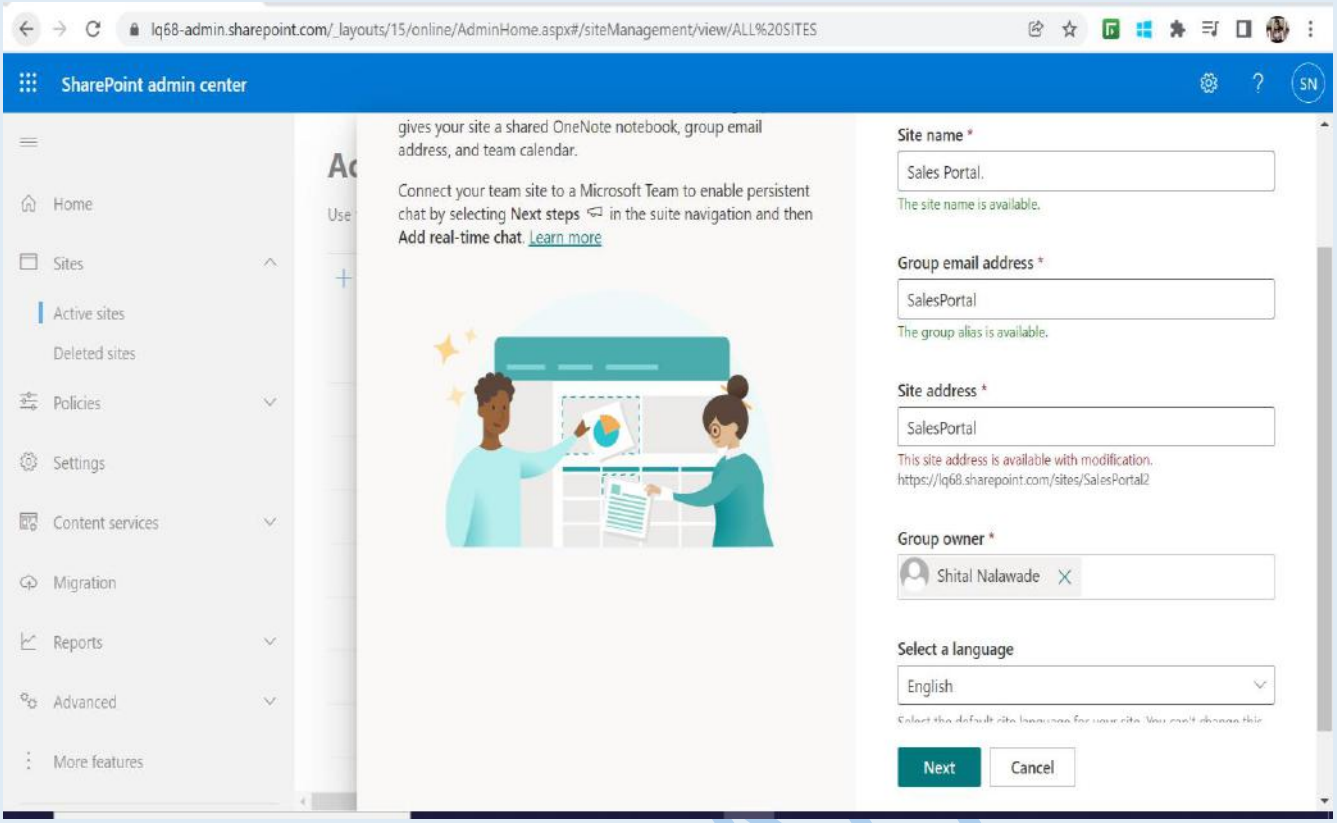
- Open sharepoint and click create site > team site

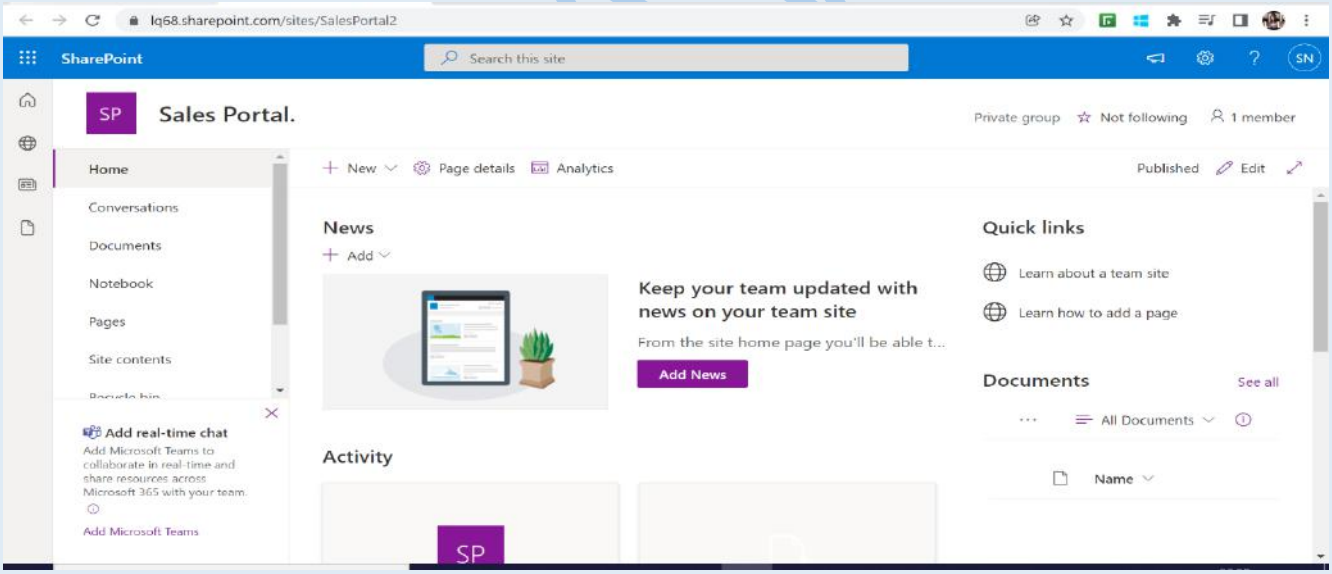




- Fill the required details -> Next -> Finish.

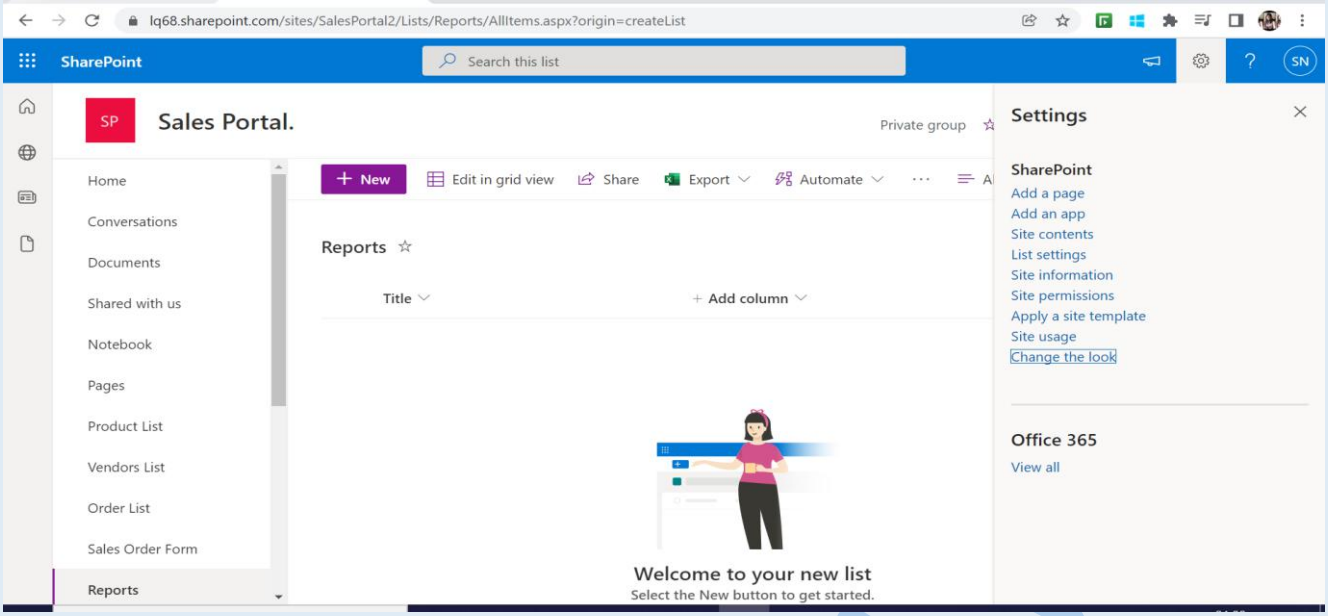


Team site is successfully created.

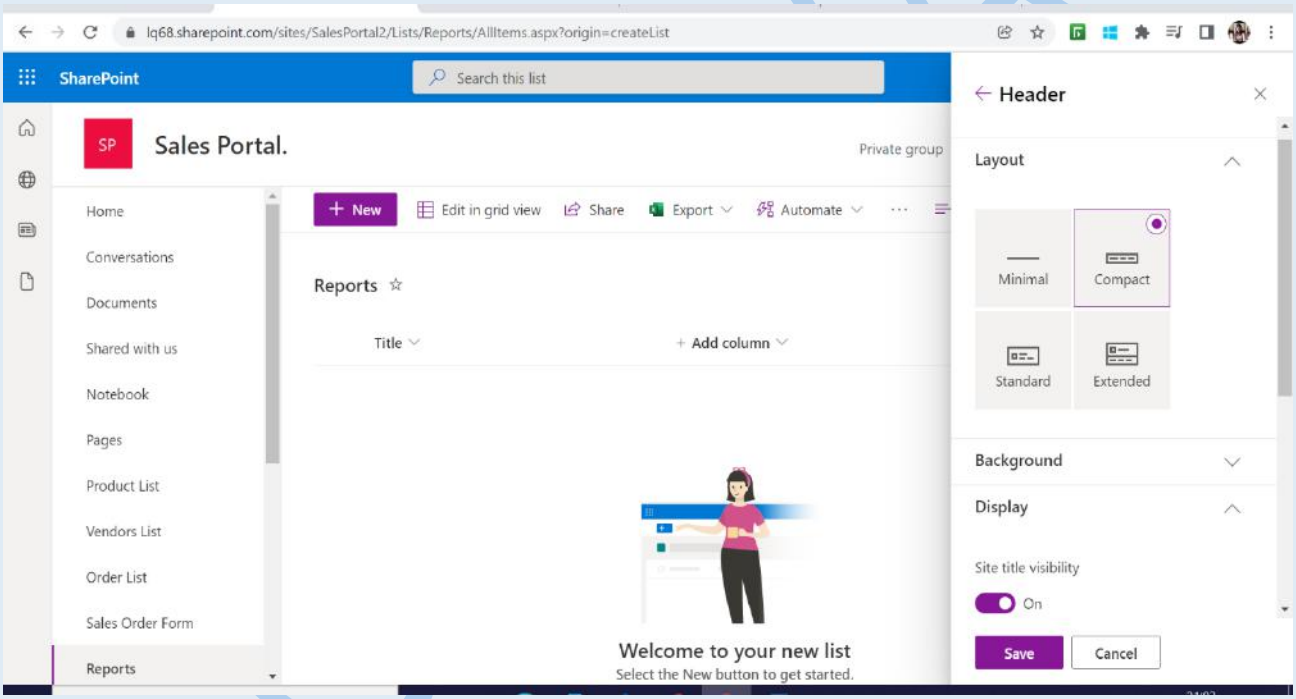


2. Design the Homepage with customization with Header & Footer.

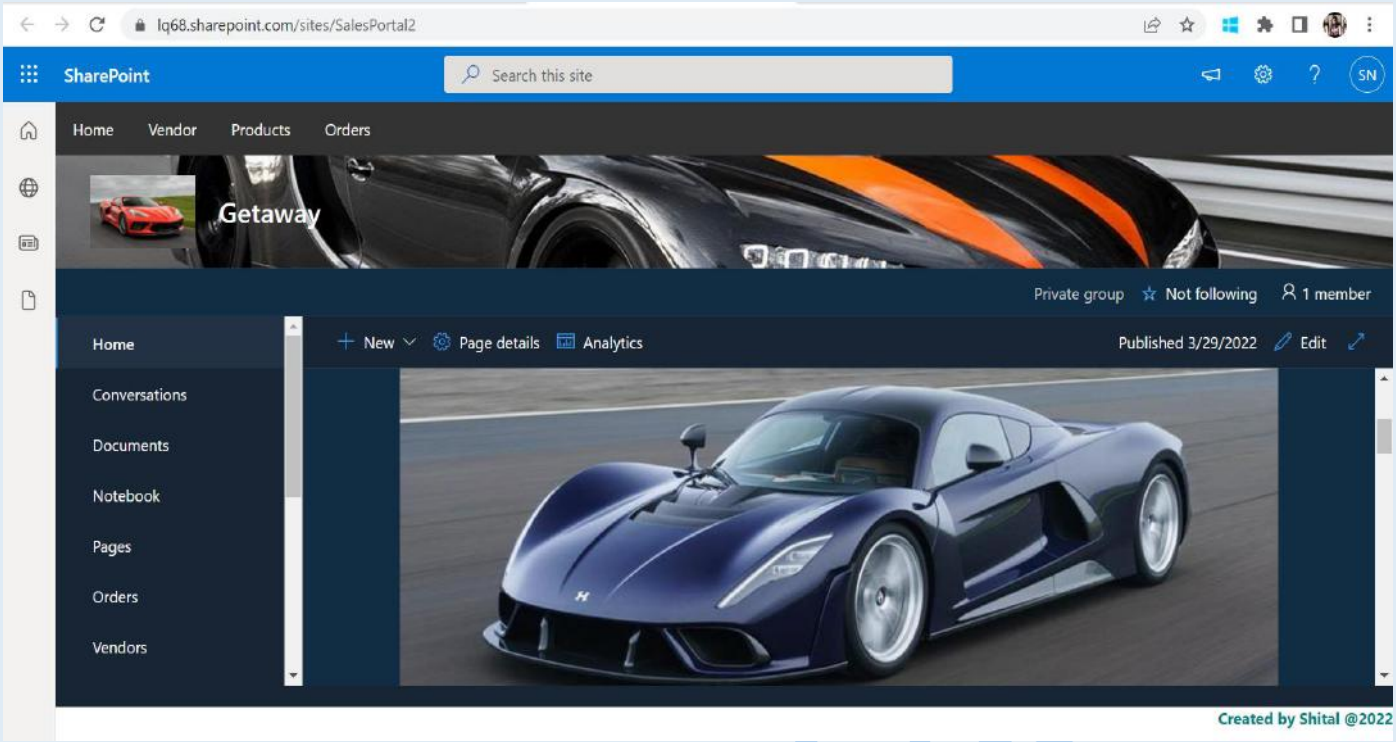
- To change the look click change the look from settings wheel gear.



- Select the theme and customize the header by uploading an image into it.

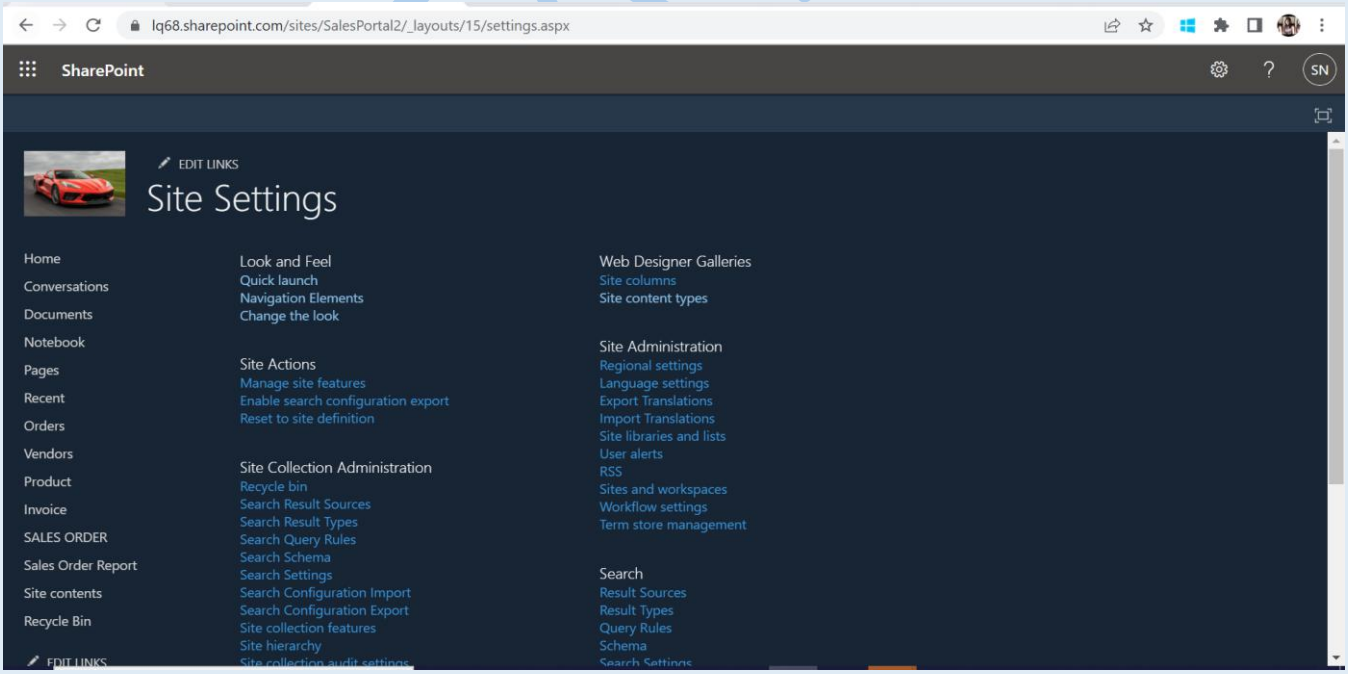


- Design home page by clicking edit on home page and can insert image into the home page

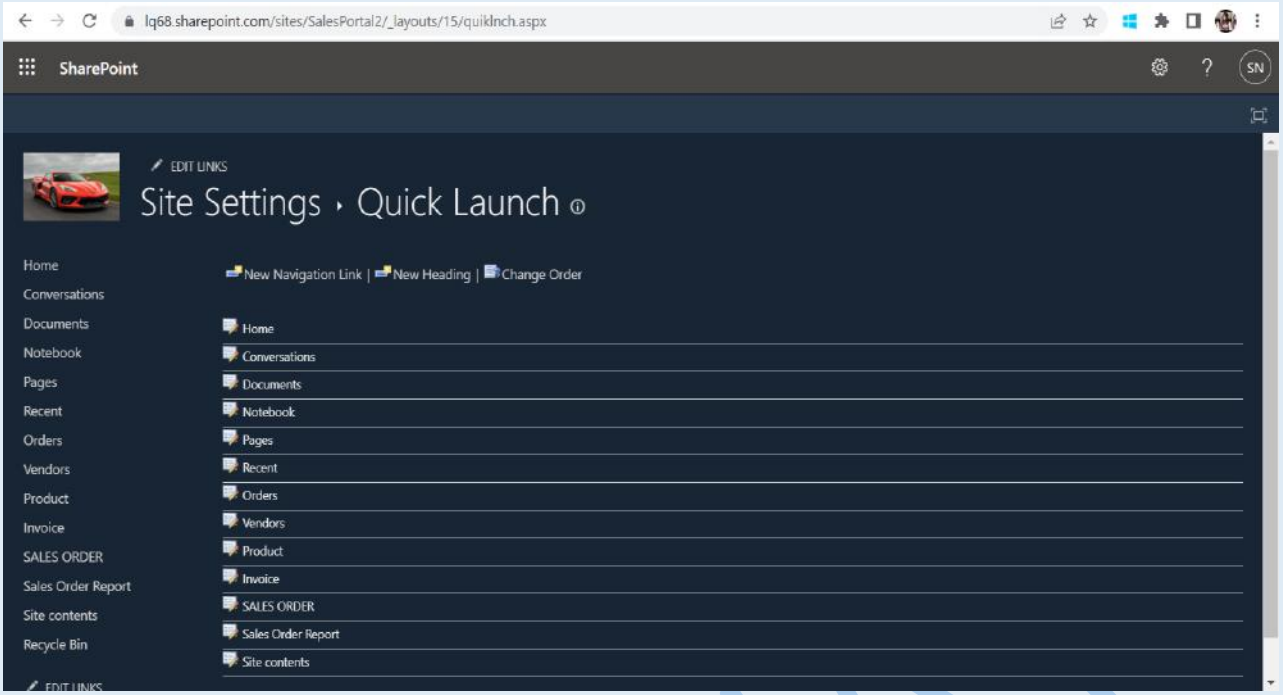


3. Configure Navigation both Top and quick launch

- Step 1: Click on gear settings symbol->site content->site settings-> Quick Launch

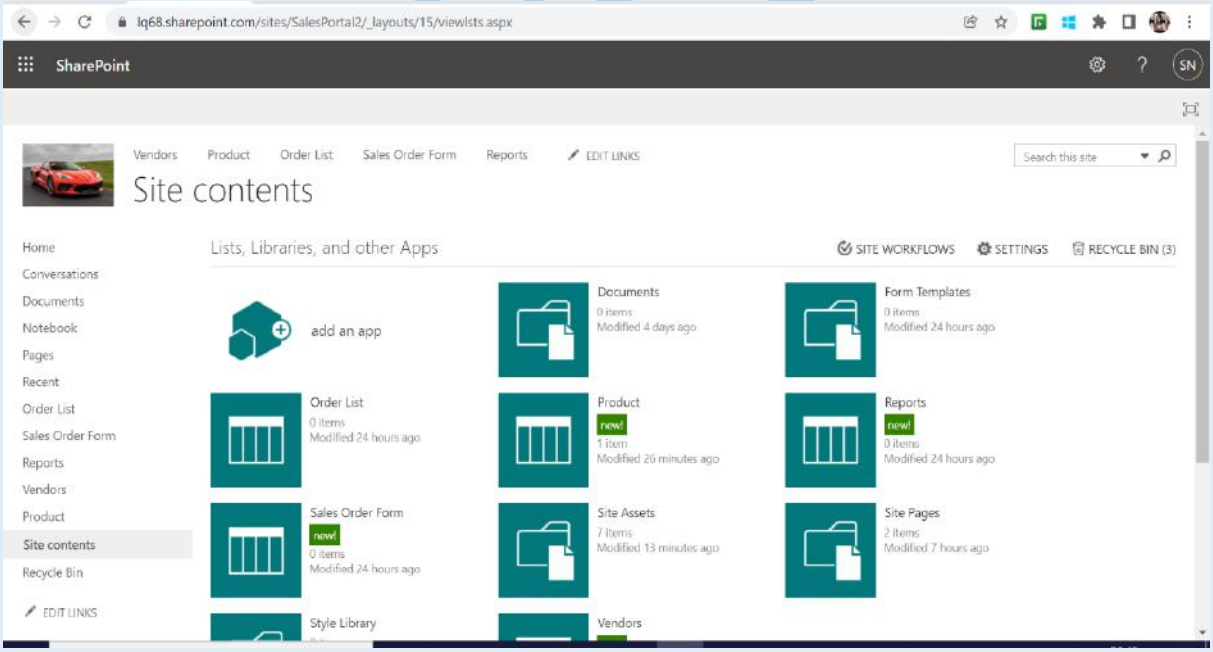


- Step 2: Here we can add the required option by clicking new Heading or New Navigation link. And we can also delete the options not required

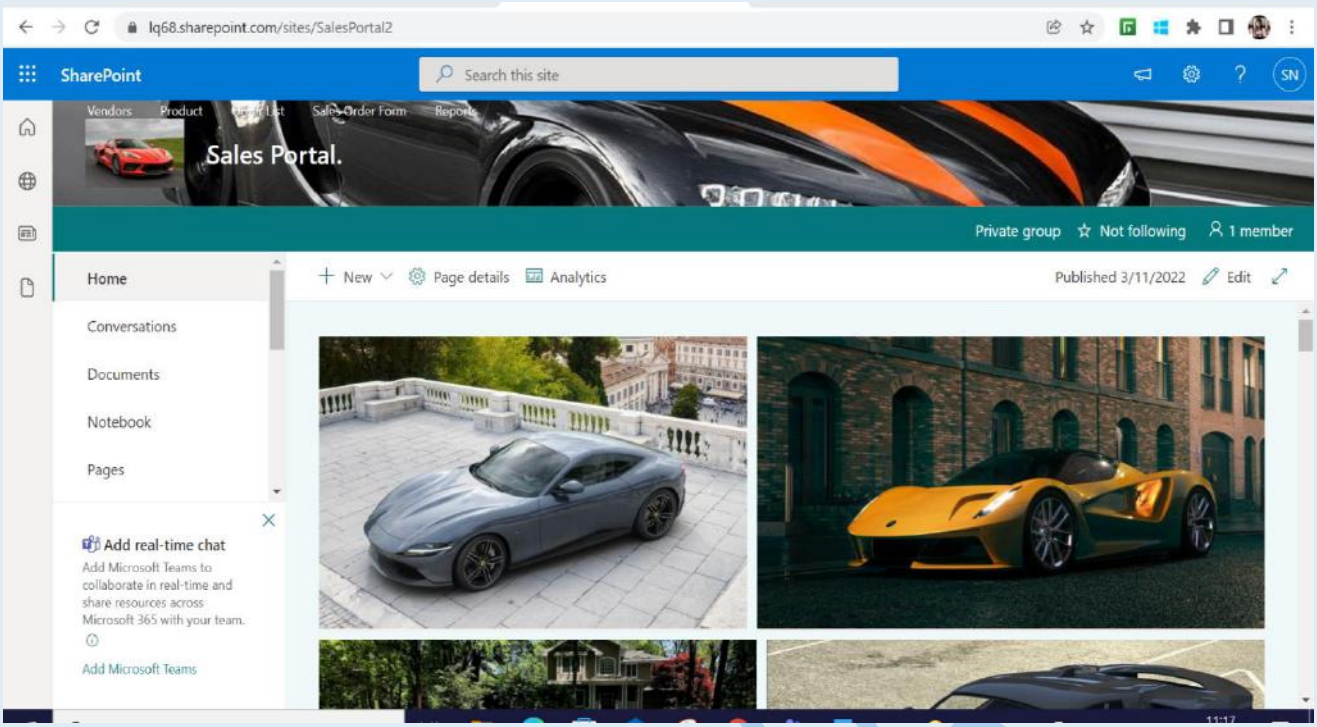


Step 3: For Top Navigation go to site contents and open it into Classic Experience and click on edit links at top

Step 4: Insert the link whose navigation is required and give the display name.



Hence, Configured Navigation – Both Top Navigation & Quick Launch Navigation as required, added appropriate links to navigate to Sales Order Form, Product, Vendor & Order Lists, reports successfully.



CUSTOMIZING THE SITE (HEADER & FOOTER)

1. Open NodeJs Command Prompt.
2. Make a directory by the command "md (name of directory)".
3. Open the directory by the command "cd (name of directory)".
4. yoeman and gulp should be installed globally. If not then install it by entering

   npm install -g gulp

   npm install -g yo
5. Now inside the directory run the yeoman for sharepoint generator.

   yo @microsoft/sharepoint
6. The sharepoint generator will fireup and ask for solution name.
7. Select baseline package as "sharepoint Online only".
8. Select client side component as "Extension" followed by "Application customizer"
9. Then give "Application customizer" name and description name.
10. The extension will start to build.

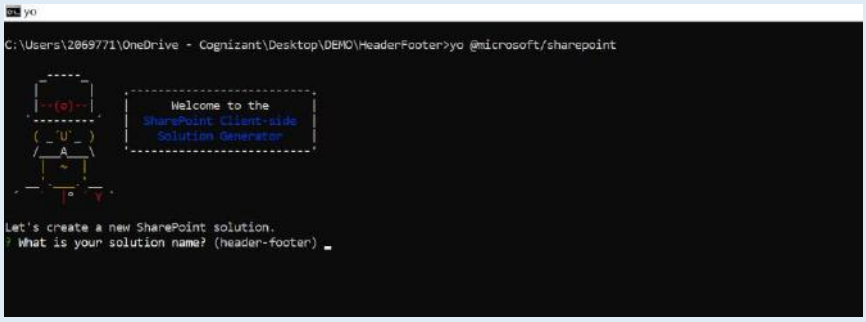


Figure 3. run yoeman

```
C:\Users\2069771\OneDrive - Cognizant\Desktop\DEMO\HeaderFooter>yo @microsoft/sharepoint

     _-----_     .-------------------------.
    |       |    |      Welcome to the     |
    |--(o)--|    |  SharePoint Client-side |
   `---------´   |   Solution Generator    |
    ( _´U`_ )    '-------------------------'
    /___A___\
     |  ~  |
   __'.___.'__
 ´   `|°  Y  `

Let's create a new SharePoint solution.
? What is your solution name? header-footer
? Which baseline packages do you want to target for your component(s)? SharePoint Online only (latest)
? Where do you want to place the files? Use the current folder
Found npm version 6.13.4
? Do you want to allow the tenant admin the choice of being able to deploy the solution to all sites immediately without running any feature deployment or adding apps in si
tes? No
? Will the components in the solution require permissions to access web APIs that are unique and not shared with other components in the tenant? No
? Which type of client-side component to create? Extension
? Which type of client-side extension to create? (Use arrow keys)
> Application Customizer
  Field Customizer
  ListView Command Set
```

Figure 4. Choose Application customizer

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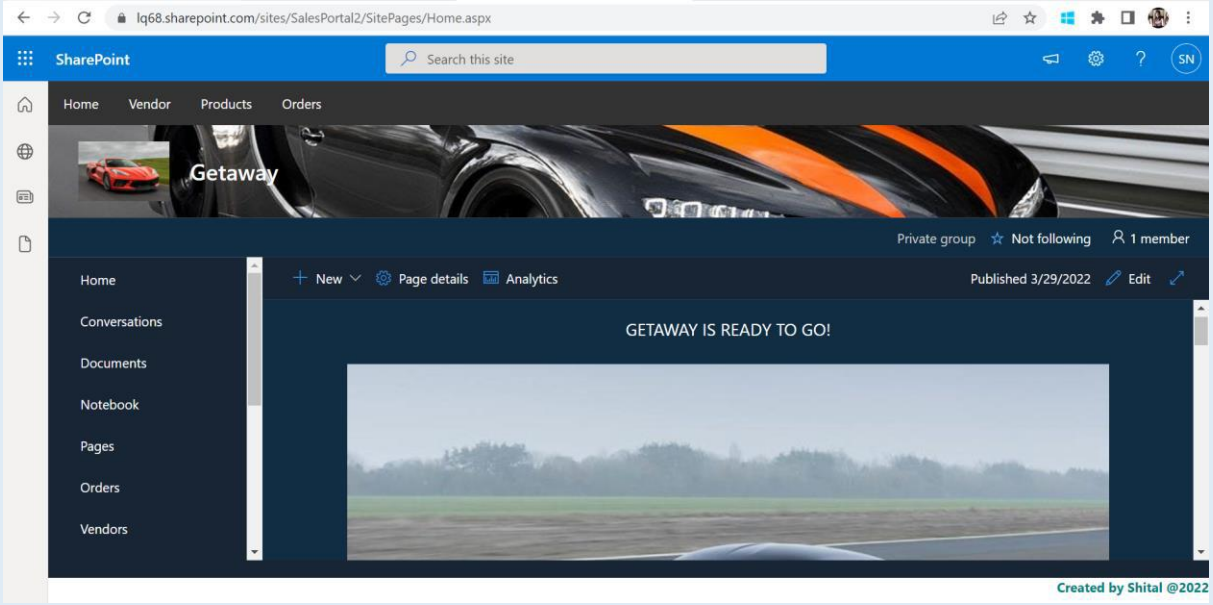
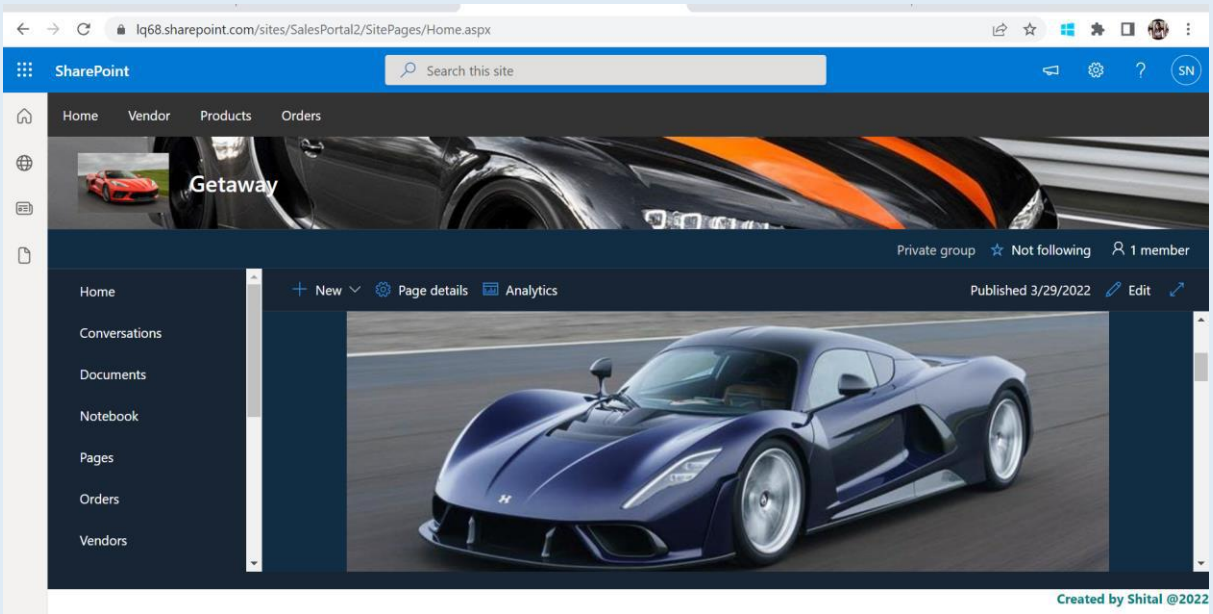
```
npm

Let's create a new SharePoint solution.
? What is your solution name? header-footer
? Which baseline packages do you want to target for your component(s)? SharePoint Online only (latest)
? Where do you want to place the files? Use the current folder
Found npm version 6.13.4
? Do you want to allow the tenant admin the choice of being able to deploy the solution to all sites immediately without running any feature deployment or adding apps in si
tes? No
? Will the components in the solution require permissions to access web APIs that are unique and not shared with other components in the tenant? No
? Which type of client-side component to create? Extension
? Which type of client-side extension to create? Application Customizer
Add new Application Customizer to solution header-footer.
? What is your Application Customizer name? HelloWorld
? What is your Application Customizer description? HelloWorld description

   create package.json
   create config\package-solution.json
   create config\config.json
   create config\serve.json
   create tsconfig.json
   create .vscode\extensions.json
   create .vscode\launch.json
   create .vscode\settings.json
   create config\copy-assets.json
   create config\deploy-azure-storage.json
   create config\write-manifests.json
   create src\index.ts
   create gulpfile.js
   create README.md
   create tslint.json
   create .editorconfig
   create .gitignore
   create src\extensions\helloWorld\HelloWorldApplicationCustomizer.ts
   create src\extensions\helloWorld\loc\en-us.js
   create src\extensions\helloWorld\loc\myStrings.d.ts
   create src\extensions\helloWorld\HelloWorldApplicationCustomizer.manifest.json
   create sharepoint\assets\ClientSideInstance.xml
   create sharepoint\assets\elements.xml
```

Figure 5. Solution will be created.

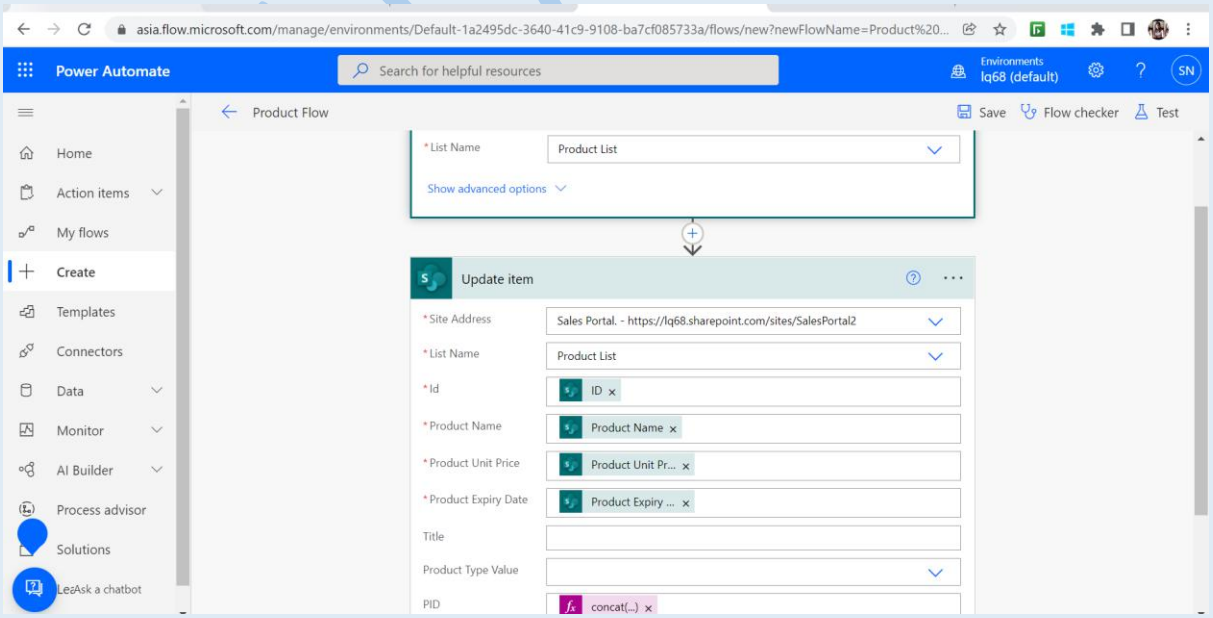
11. Editing the Extension in Visual Studio Code.
12. In the Nodejs command prompt , inside the parent directory run "code ." vs code will open.
13. Now the file structure is shown in below image.
14. Open "src/extension/homepage/ HeaderFooterApplicationCustomizer.ts".

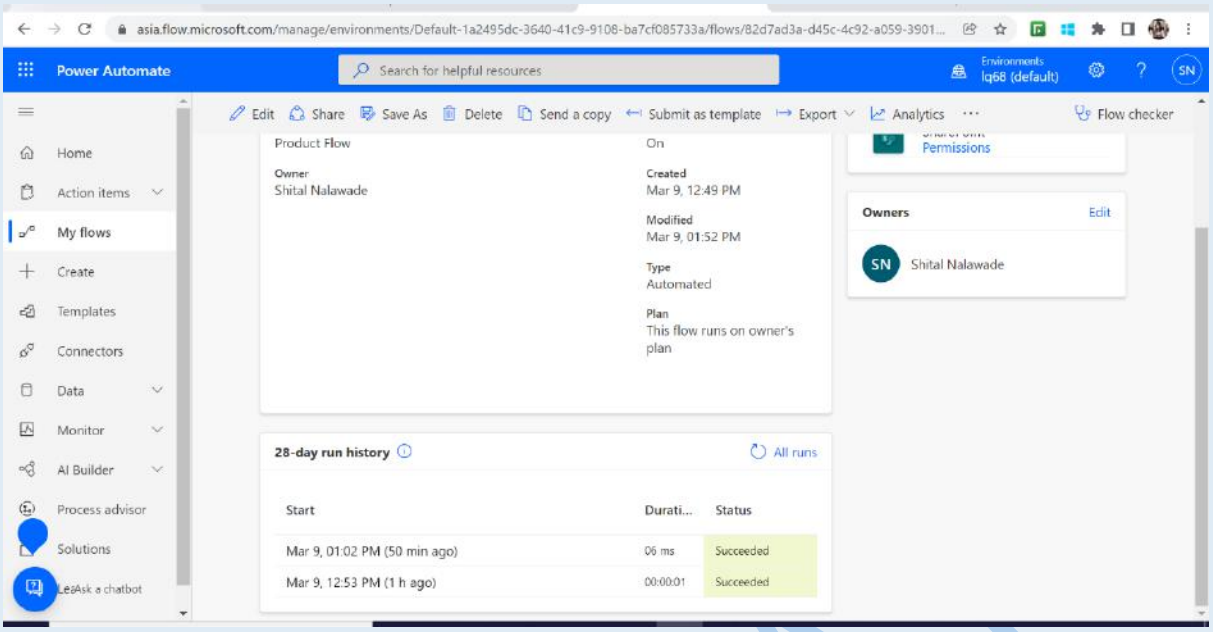




4. Create lists and generate id for vendor and product as auto generated id using flow:

Product List:

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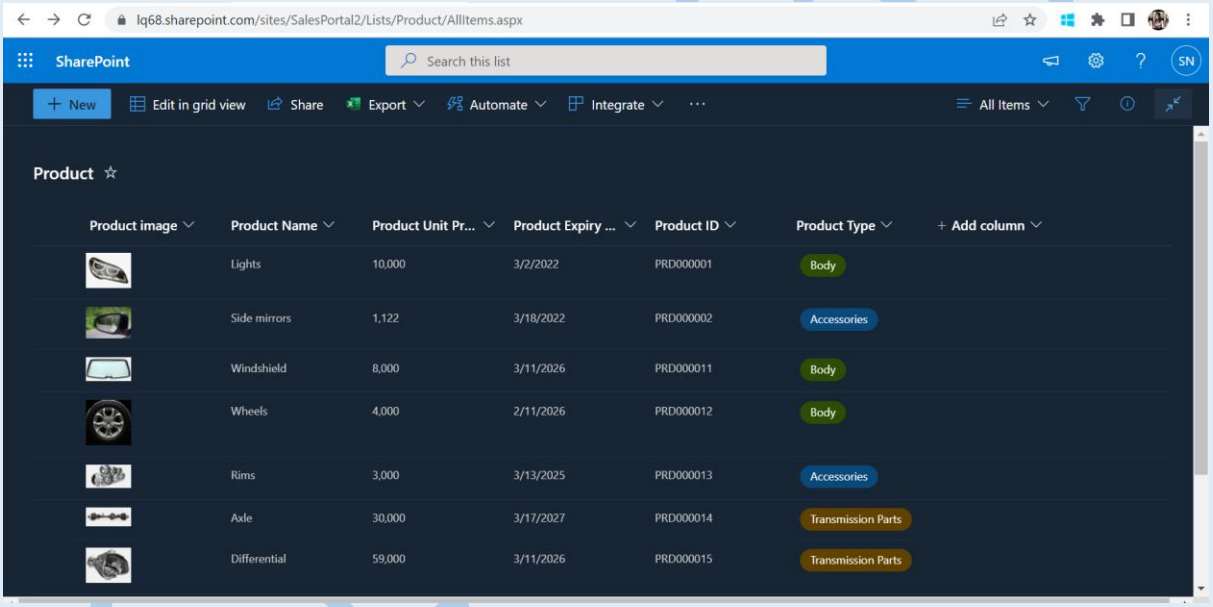
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Edit
Share
Save As
Delete
Send a copy
Submit as template
Export
Analytics
Flow checker
Product Flow
On
Owner
Shital Nalawade
Created
Mar 9, 12:49 PM
Modified
Mar 9, 01:52 PM
Type
Automated
Plan
This flow runs on owner's plan
Permissions
Owners
Edit
SN
Shital Nalawade
28-day run history
All runs
Start
Durati...
Status
Mar 9, 01:02 PM (50 min ago)
06 ms
Succeeded
Mar 9, 12:53 PM (1 h ago)
00:00:01
Succeeded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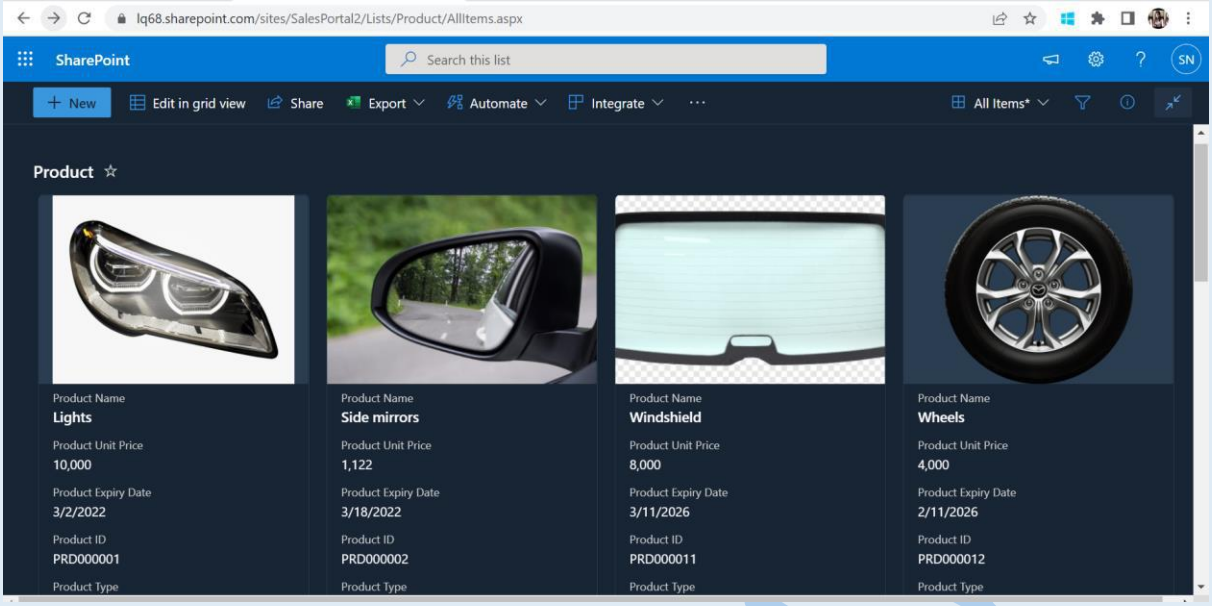
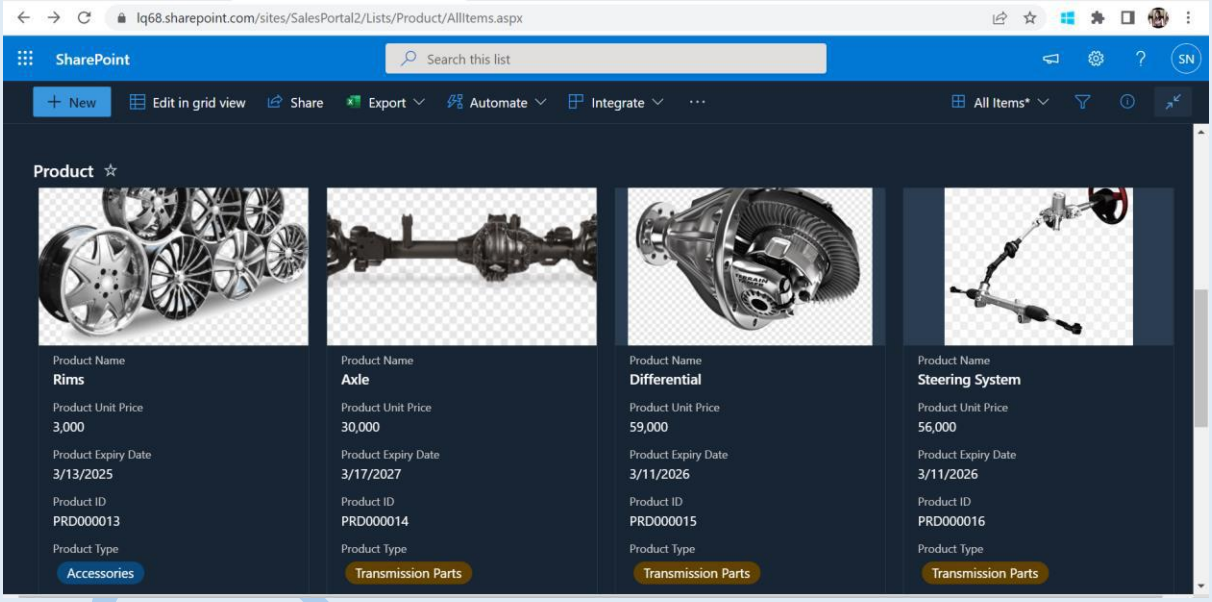
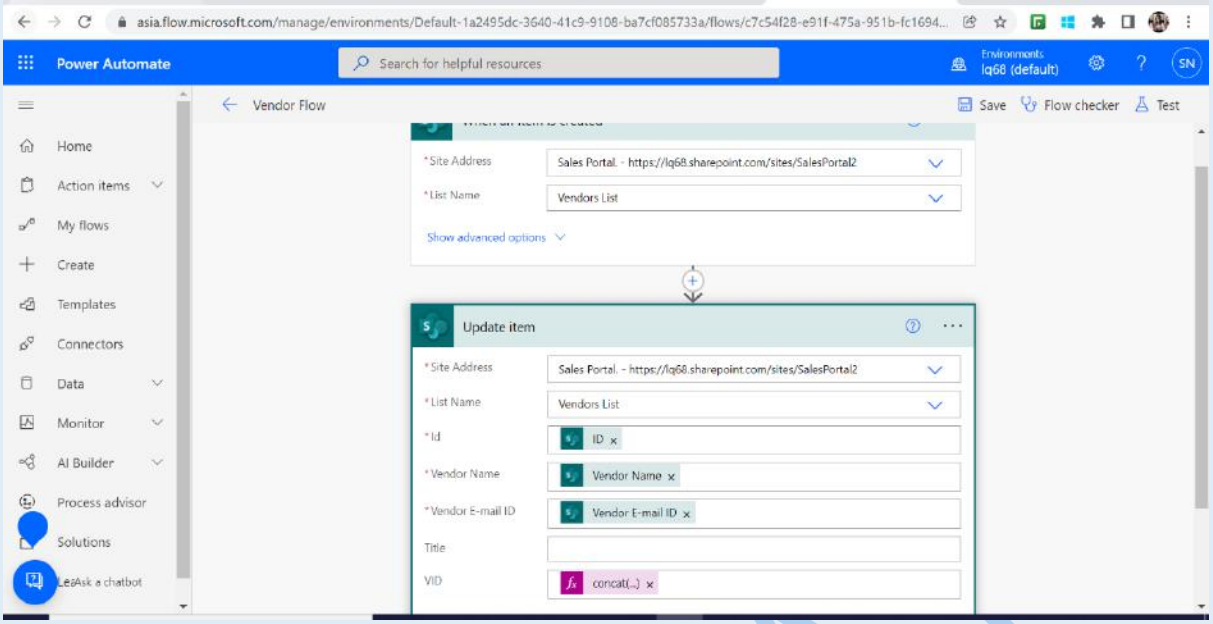
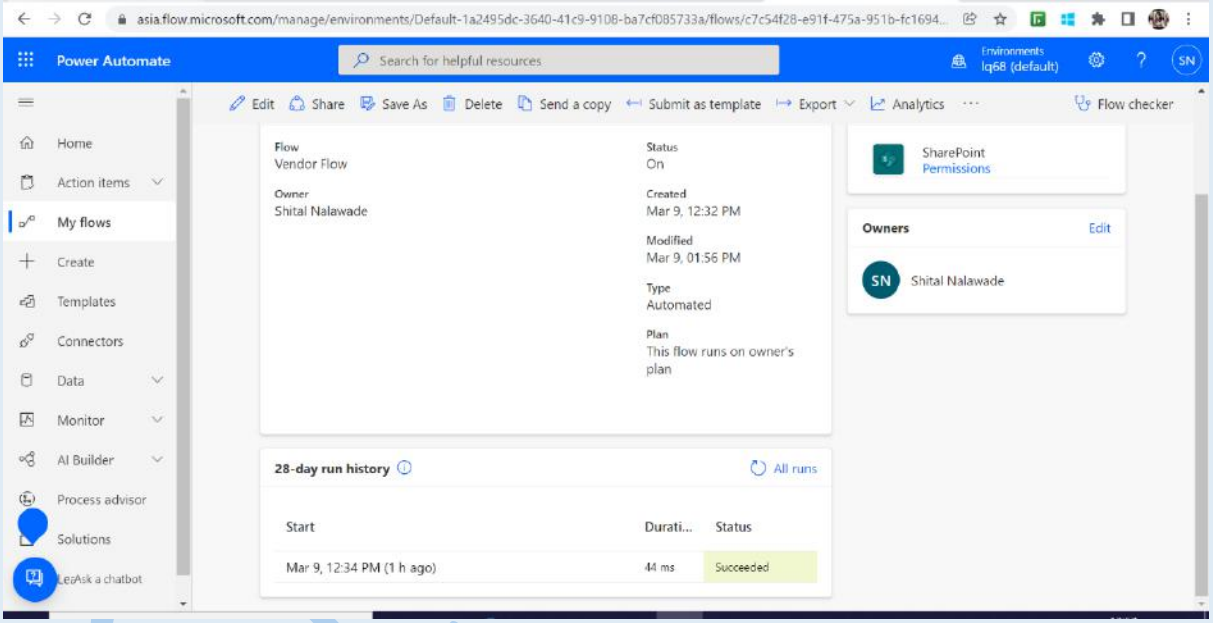
SharePoint
Search this list
SN
New
Edit in grid view
Share
Export
Automate
Integrate
All Items
Product
Product image
Product Name
Product Unit Pr...
Product Expiry ...
Product ID
Product Type
Add column
Lights
10,000
3/2/2022
PRD000001
Body
Side mirrors
1,122
3/18/2022
PRD000002
Accessories
Windshield
8,000
3/11/2026
PRD000011
Body
Wheels
4,000
2/11/2026
PRD000012
Body
Rims
3,000
3/13/2025
PRD000013
Accessories
Axle
30,000
3/17/2027
PRD000014
Transmission Parts
Differential
59,000
3/11/2026
PRD000015
Transmission Parts

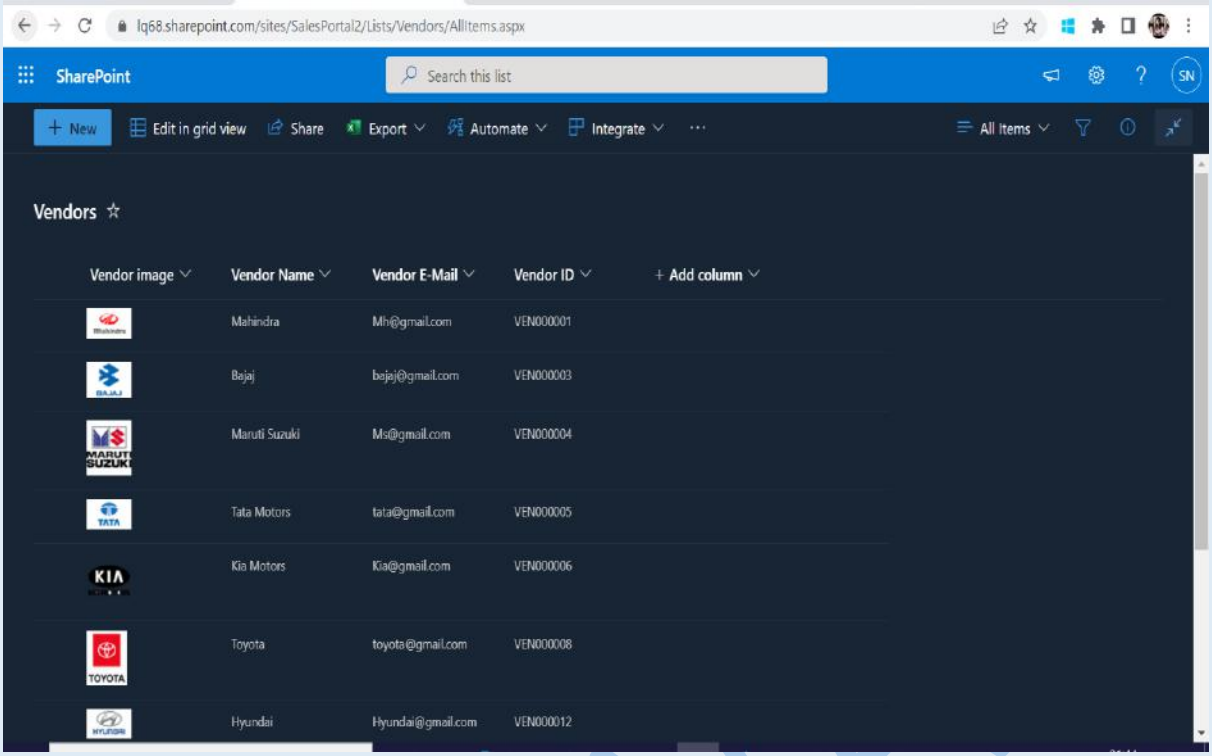

lq68.sharepoint.com/sites/SalesPortal2/Lists/Product/AllItems.aspx
SharePoint
Search this list
SN
New
Edit in grid view
Share
Export
Automate
Integrate
All Items*
Product
Product Name
Lights
Product Unit Price
10,000
Product Expiry Date
3/2/2022
Product ID
PRD000001
Product Type
Product Name
Side mirrors
Product Unit Price
1,122
Product Expiry Date
3/18/2022
Product ID
PRD000002
Product Type
Product Name
Windshield
Product Unit Price
8,000
Product Expiry Date
3/11/2026
Product ID
PRD000011
Product Type
Product Name
Wheels
Product Unit Price
4,000
Product Expiry Date
2/11/2026
Product ID
PRD000012
Product Type

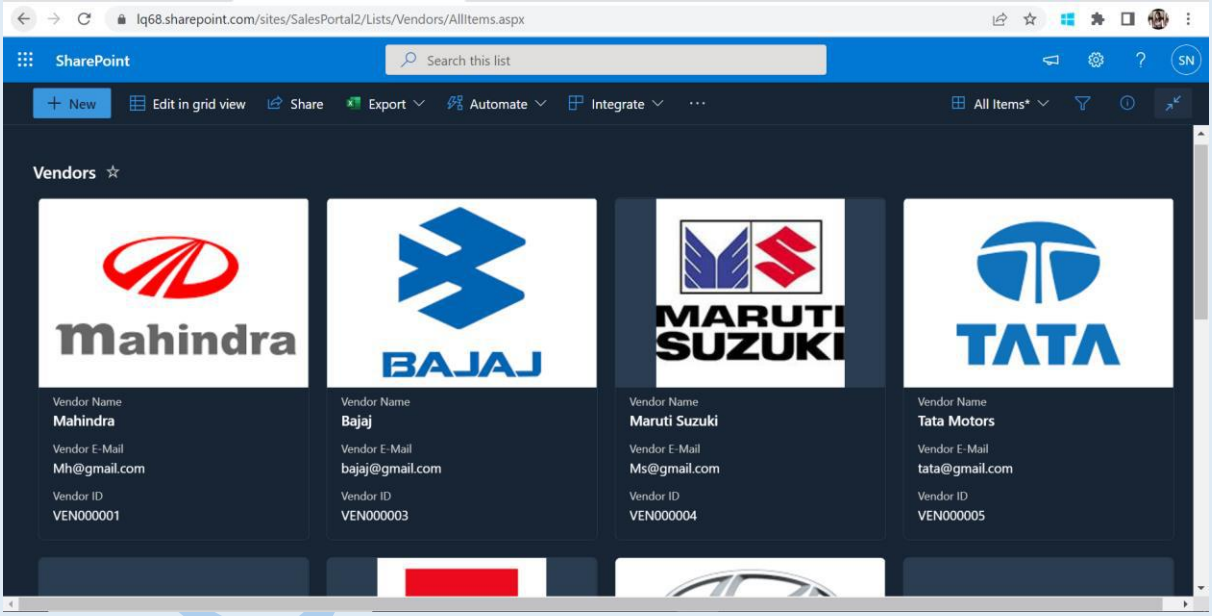

lq68.sharepoint.com/sites/SalesPortal2/Lists/Product/AllItems.aspx
SharePoint
Search this list
SN
New
Edit in grid view
Share
Export
Automate
Integrate
All Items*
Product
Product Name
Rims
Product Unit Price
3,000
Product Expiry Date
3/13/2025
Product ID
PRD000013
Product Type
Accessories
Product Name
Axle
Product Unit Price
30,000
Product Expiry Date
3/17/2027
Product ID
PRD000014
Product Type
Transmission Parts
Product Name
Differential
Product Unit Price
59,000
Product Expiry Date
3/11/2026
Product ID
PRD000015
Product Type
Transmission Parts
Product Name
Steering System
Product Unit Price
56,000
Product Expiry Date
3/11/2026
Product ID
PRD000016
Product Type
Transmission Parts

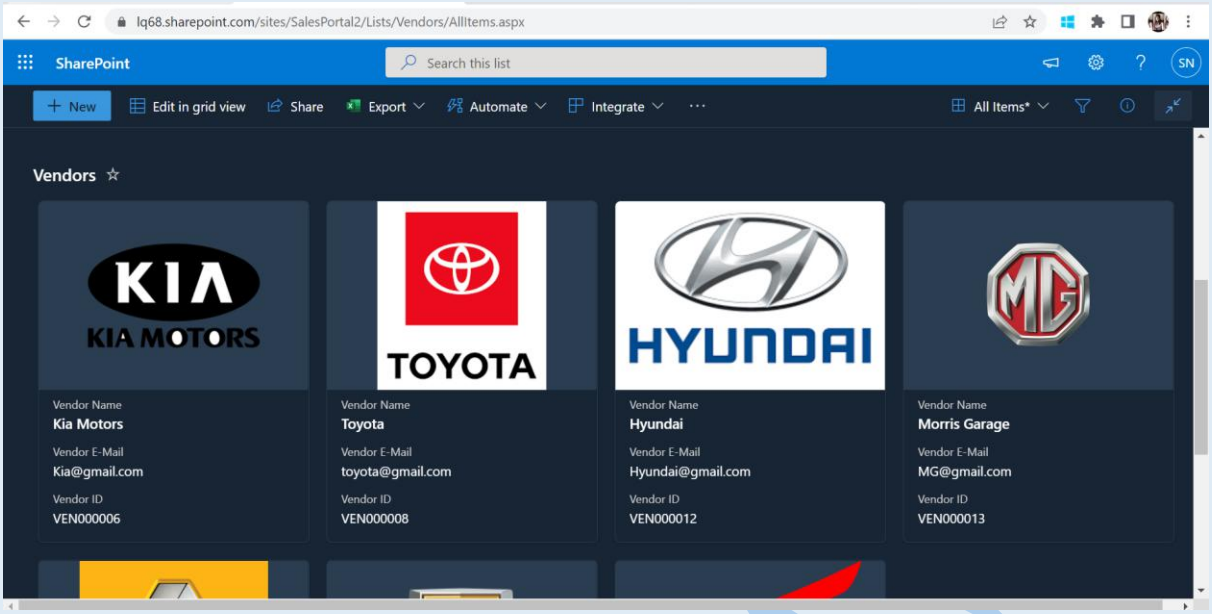
Vendor ID:


asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/c7c54f28-e91f-475a-951b-fc1694...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Vendor Flow
Save
Flow checker
Test
* Site Address
Sales Portal. - https://lq68.sharepoint.com/sites/SalesPortal2
* List Name
Vendors List
Show advanced options
Update item
* Site Address
Sales Portal. - https://lq68.sharepoint.com/sites/SalesPortal2
* List Name
Vendors List
* Id
ID
* Vendor Name
Vendor Name
* Vendor E-mail ID
Vendor E-mail ID
Title
VID
concat(...)


asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/c7c54f28-e91f-475a-951b-fc1694...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Edit
Share
Save As
Delete
Send a copy
Submit as template
Export
Analytics
Flow checker
Flow
Vendor Flow
Owner
Shital Nalawade
Status
On
Created
Mar 9, 12:32 PM
Modified
Mar 9, 01:56 PM
Type
Automated
Plan
This flow runs on owner's plan
SharePoint
Permissions
Owners
Edit
SN
Shital Nalawade
28-day run history
All runs
Start
Durati...
Status
Mar 9, 12:34 PM (1 h ago)
44 ms
Succeeded


lq68.sharepoint.com/sites/SalesPortal2/Lists/Vendors/AllItems.aspx
SharePoint
Search this list
SN
New
Edit in grid view
Share
Export
Automate
Integrate
All Items
Vendors
Vendor image
Vendor Name
Vendor E-Mail
Vendor ID
Add column
Mahindra
Mh@gmail.com
VEN000001
Bajaj
bajaj@gmail.com
VEN000003
Maruti Suzuki
Ms@gmail.com
VEN000004
Tata Motors
tata@gmail.com
VEN000005
Kia Motors
Kia@gmail.com
VEN000006
Toyota
toyota@gmail.com
VEN000008
Hyundai
Hyundai@gmail.com
VEN000012


lq68.sharepoint.com/sites/SalesPortal2/Lists/Vendors/AllItems.aspx
SharePoint
Search this list
SN
New
Edit in grid view
Share
Export
Automate
Integrate
All Items*
Vendors
Mahindra
Vendor Name
Mahindra
Vendor E-Mail
Mh@gmail.com
Vendor ID
VEN000001
BAJAJ
Vendor Name
Bajaj
Vendor E-Mail
bajaj@gmail.com
Vendor ID
VEN000003
MARUTI SUZUKI
Vendor Name
Maruti Suzuki
Vendor E-Mail
Ms@gmail.com
Vendor ID
VEN000004
TATA
Vendor Name
Tata Motors
Vendor E-Mail
tata@gmail.com
Vendor ID
VEN000005



5. Build a SPFx webpart with ReactJS Framework UI to make the order entries which will have the following UI fields with Header and Footer

1. Vendor Name: (Dropdown list which gets data from vendor list)
2. Product Name: (Dropdown list which will display all the products)
3. Product Type – Auto populate based on selected product name field
4. Product Expiry date – Auto populate based on selected product name field
5. Product Unit value – Auto populate based on selected product name field
6. Number of Units – Textbox that accepts only numeric values
7. Sale value – Calculated based on Number of Units (*) Unit value
8. Add Button – To add the order to Orders list
9. Edit Button – To edit the orders by passing Order ID
10. Delete Button – To Delete Orders by passing Order ID
11. Reset Button – To Clear all values after Insert, update operations

Steps for Creation:

1. Create a project using node.js command prompt and select the REACT framework.
2. Open the project in the Visual Studio Code.
3. Go components folder create a file with name SpfxMfrp.ts.
4. Define the variables that will be used in the main code as states.
5. After that go to .tsx extension file and write the main code.
6. Install the necessary packages like PNP in the command prompt of Visual Studio.
7. Add the html part and methods in the main code.
8. Now using gulp serve execute the code and check whether the code is working properly or not.
9. Now to customize the form go to file with extension .scss
10. Now deploy this file in the app catalog.

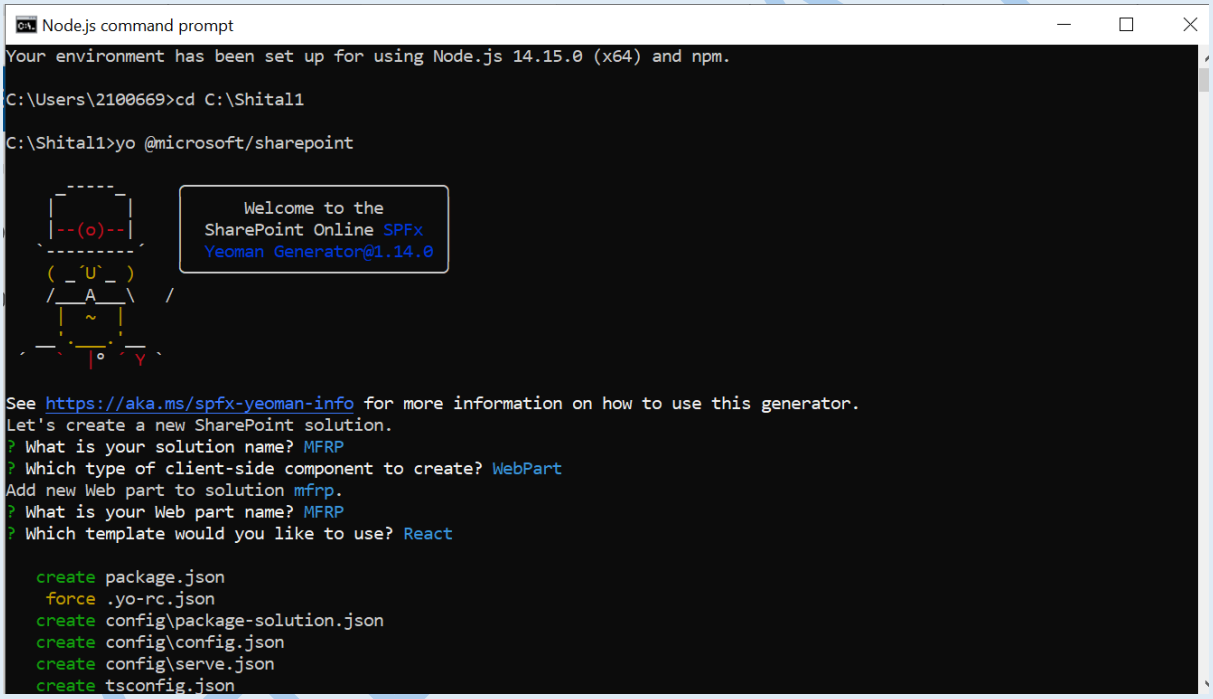
Summarizing the steps with commands:

- Step one : Setting up Node Environment
- Step Two : Using Scaffolding tool[yeoman]

- Step three: install Sp -pnp- js libraries
- Step Four: Embed Coding into the src folder
- Step Five : Run Gulp Commands
- Step Six : Configure App Catalogue

First check the working of the spfx in online workbench using the visual studio code before deploying it to the sharepoint:

Run : yo @microsoft/sharepoint



```
Node.js command prompt
npm WARN optional SKIPPING OPTIONAL DEPENDENCY: fsevents@~2.1.2 (node_modules\@rushstack\typings-generator\node_modules\
chokidar\node_modules\fsevents):
npm WARN notsup SKIPPING OPTIONAL DEPENDENCY: Unsupported platform for fsevents@2.1.3: wanted {"os":"darwin","arch":"any
"} (current: {"os":"win32","arch":"x64"})
npm WARN ajv-keywords@3.5.2 requires a peer of ajv@^6.9.1 but none is installed. You must install peer dependencies your
self.

added 2306 packages from 1042 contributors and audited 2312 packages in 647.653s

118 packages are looking for funding
  run `npm fund` for details

found 118 vulnerabilities (16 low, 65 moderate, 34 high, 3 critical)
  run `npm audit fix` to fix them, or `npm audit` for details


      _=+#####!
   ###########|       .-----------------------------------.
   ###/    (##|(@)    |          Congratulations!         |
   ###  ######|   \   |     Solution mfrp is created.     |
   ###/   /###|   (@) |  Run gulp serve to play with it!  |
   #######  ##|   /   '-----------------------------------'
   ###     /##|(@)
   ###########|
      **=+####!


C:\Shital1>
```

Answer the required conditions:

1)What is your solution name?: mprfspfxnew.

2)Which baseline packages do you want to target for your component(s)?: SharePoint Online only (latest)

3)Where do you want to place the files?: Use the current folder

4).Do you want to allow the tenant admin the choice of being able to deploy the solution to all sites immediately without running any feature deployment or adding apps in sites?: N

5).Will the components in the solution require permissions to access web APIs that are unique and not shared with other components in the tenant?: N

6)Which type of client-side component to create?: WebPart

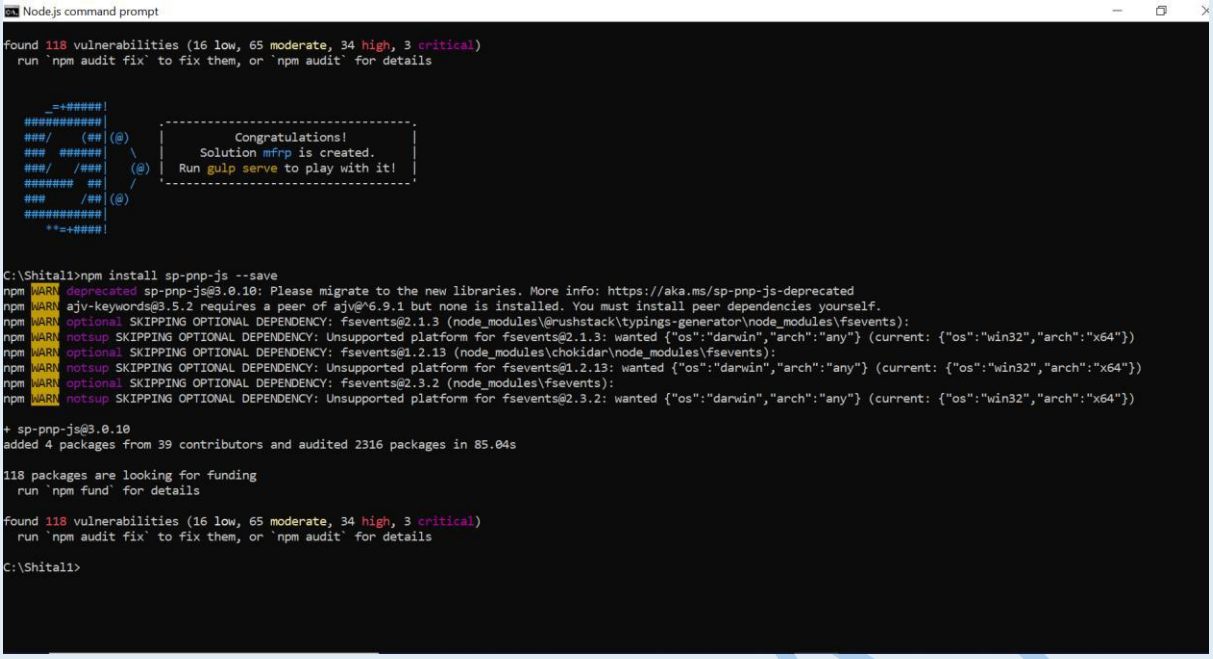
7)What is your Web part name?: mfrpspfxnew

8).What is your Web part description?: mfrpspfxnew description

9) Which framework would you like to use?: React

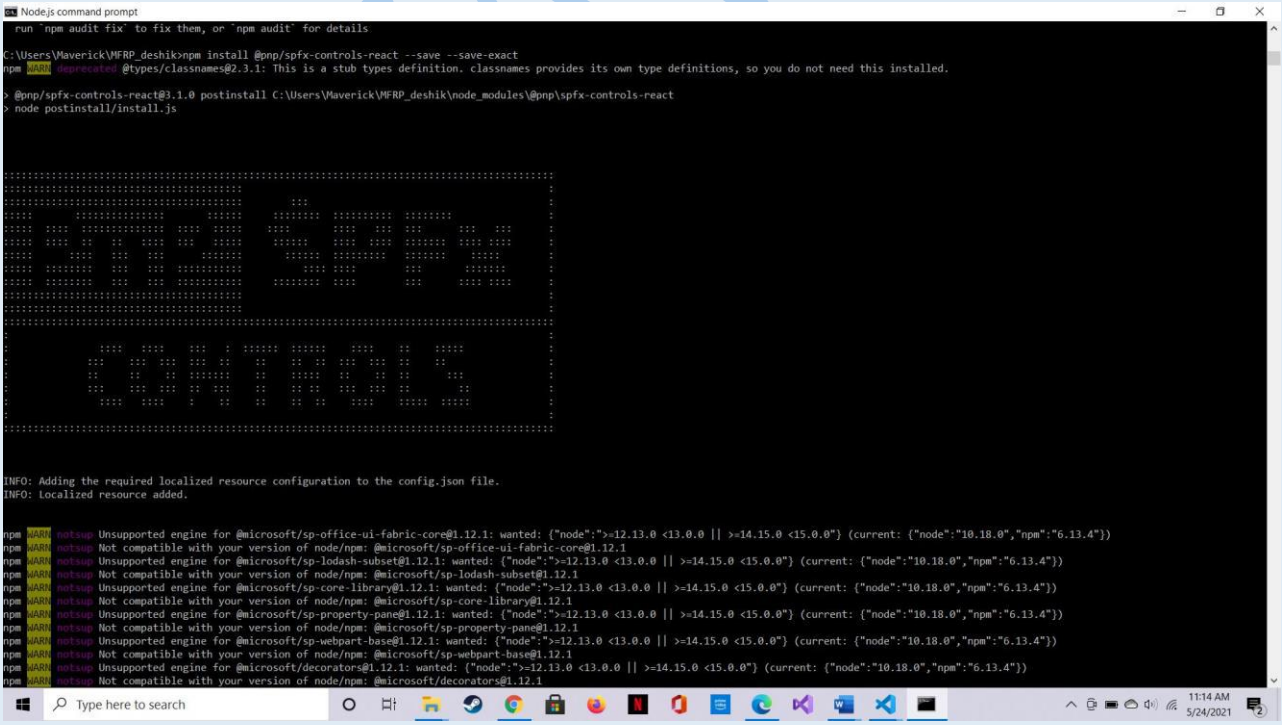
Run: npm install sp-pnp-js --save:

This package contains the fluent api used to call the SharePoint rest services. Install the library and required dependencies



Run: npm install @pnp/spfx-controls-react --save --save-exact:

This command is used to install the dependency to your project. In order to export the PnP reusable controls and PnP property controls from a SPFx library component solution there are a few things to do.

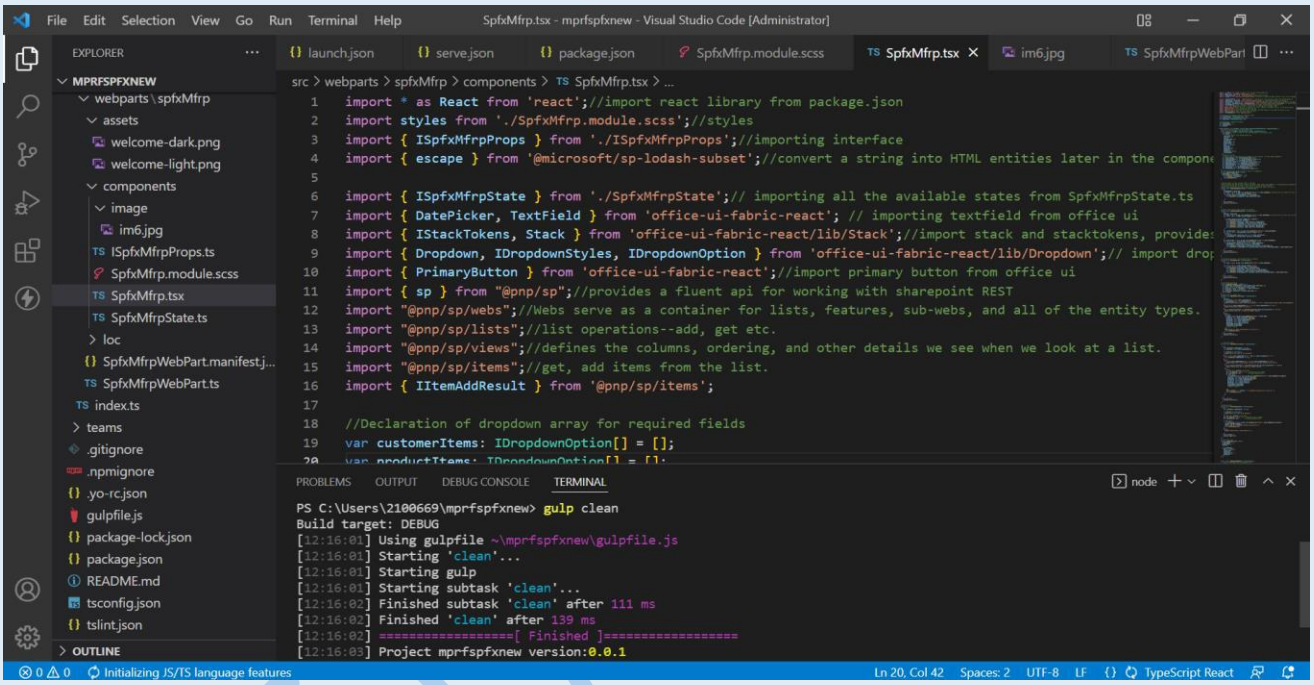


Embed Coding into the src folder:

For further inquiry refer to the Code Document.

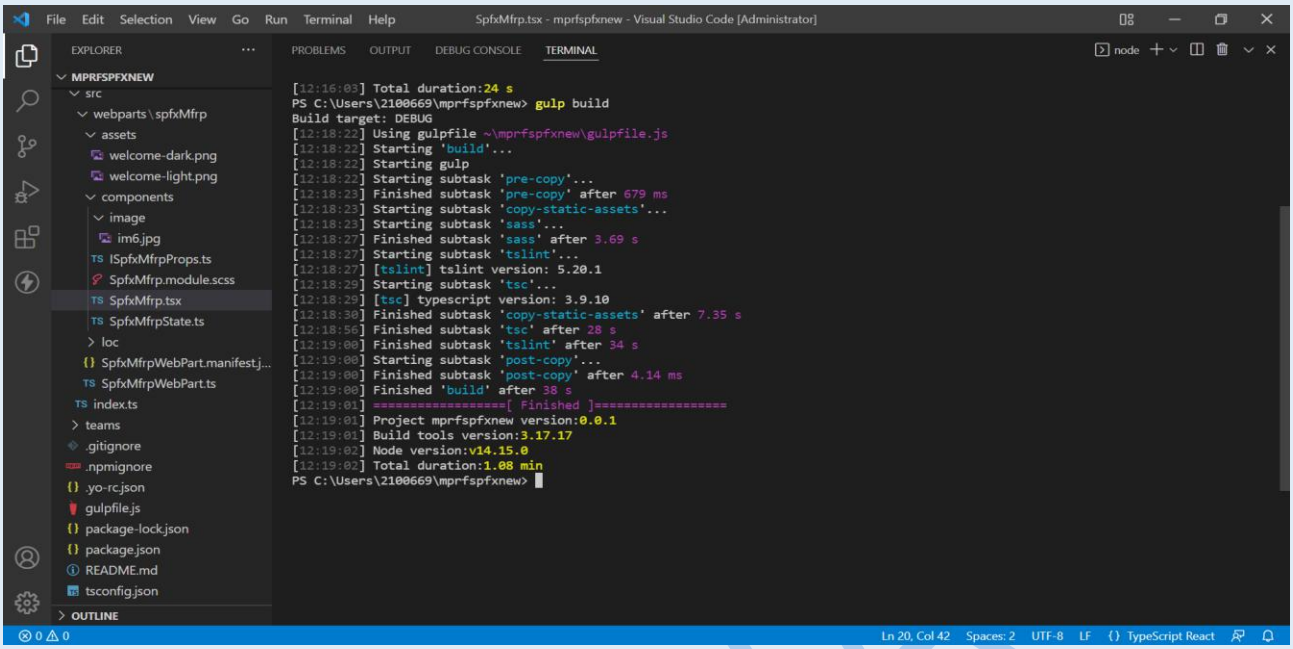
Run Gulp Commands:

gulp clean: Removes Unwanted Cache files and folders.



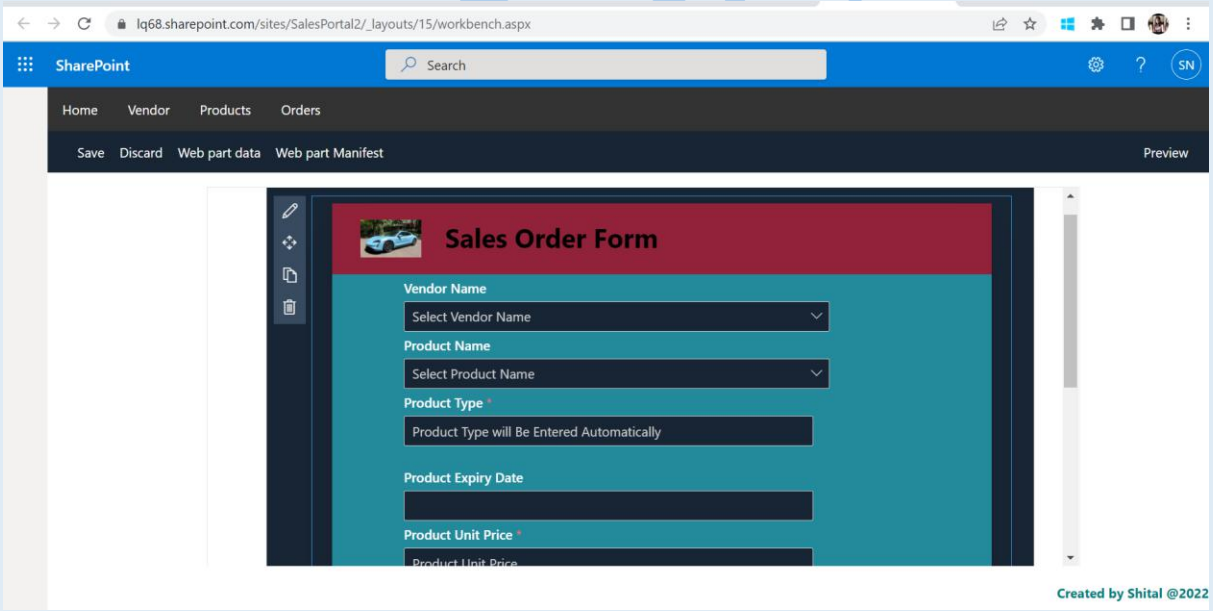
.

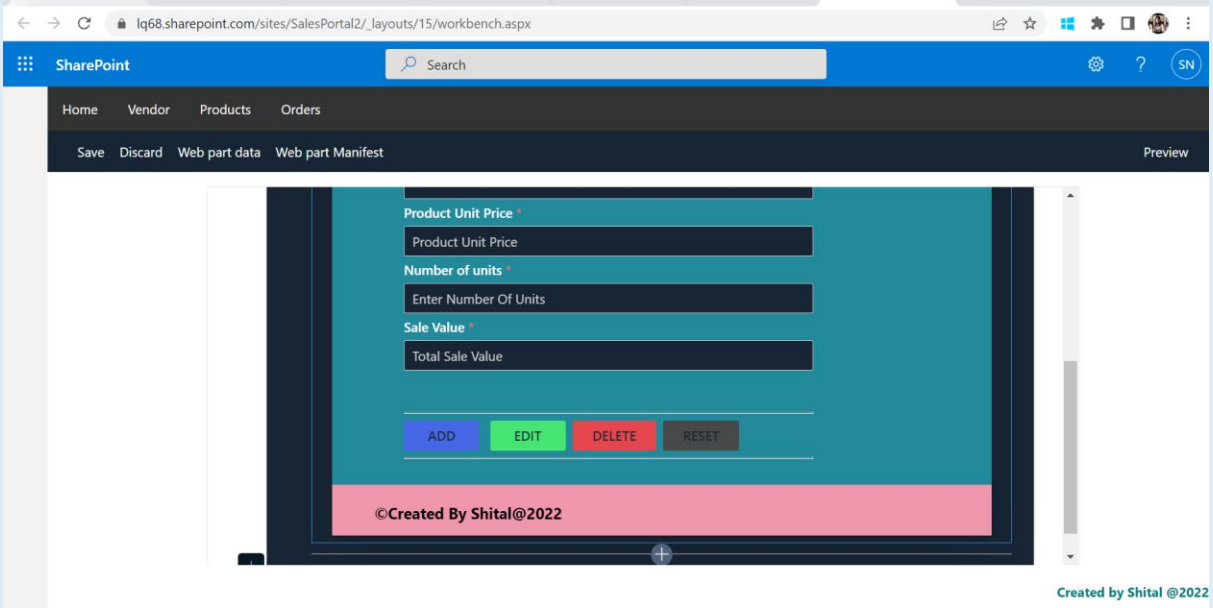
gulp build: build the project.



gulp serve: build and bundle the project and run the development server.

Check if the spfx is running on local workbench first:

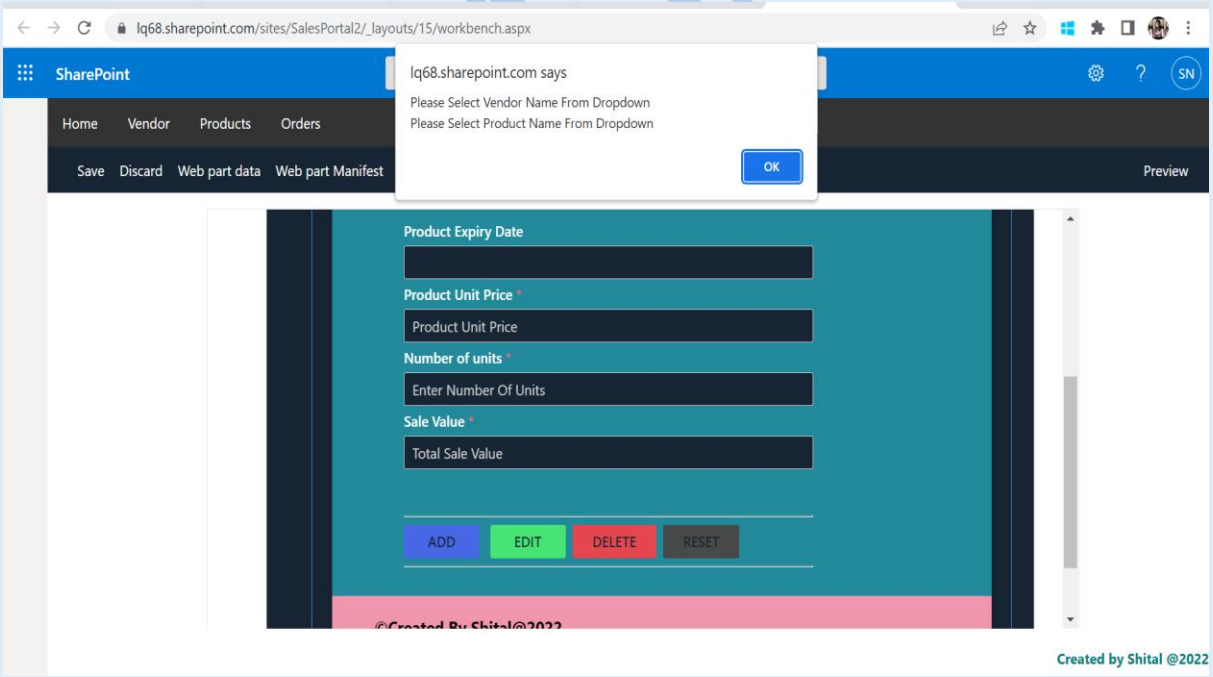


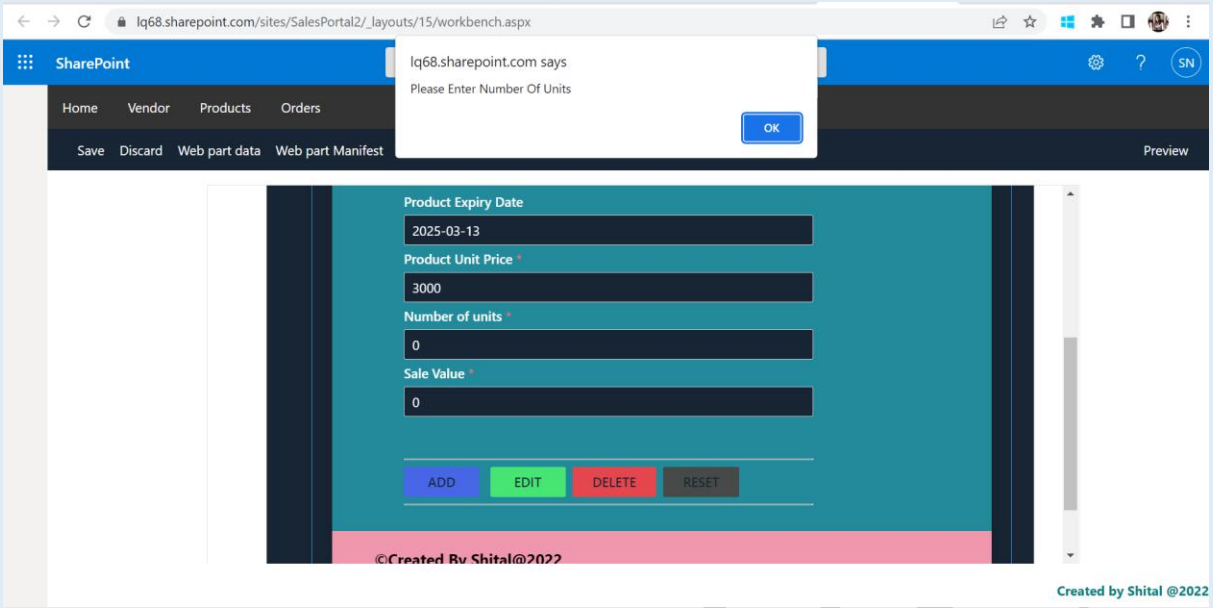


Now open the online workbench using /_layouts/15/workbench.aspx

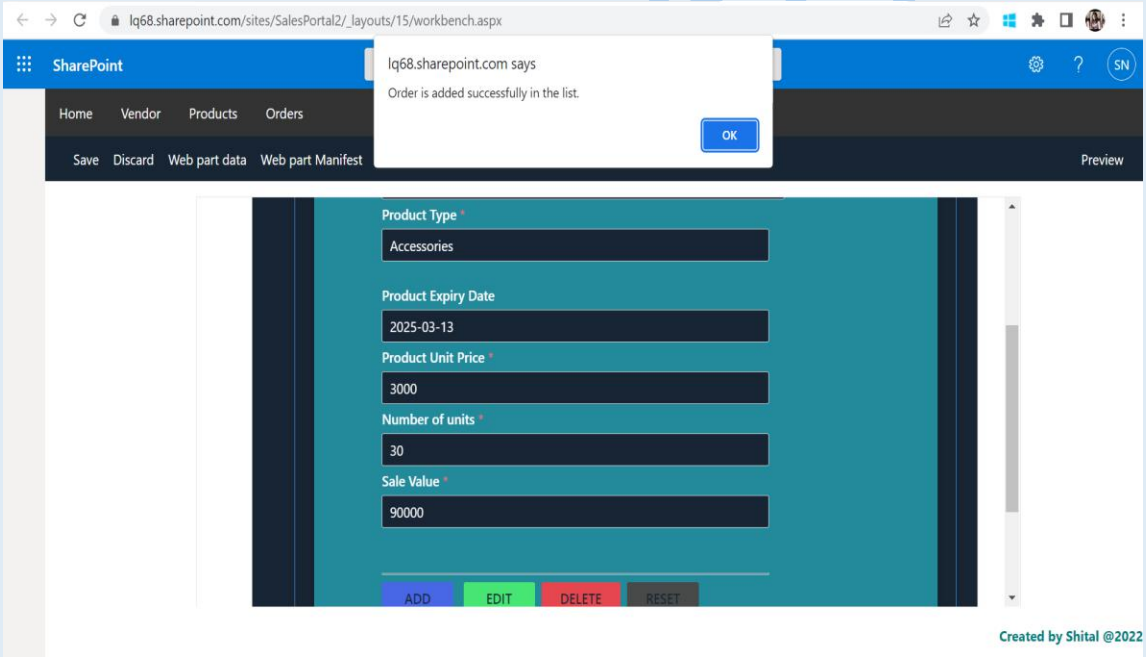
Operations:

Validation

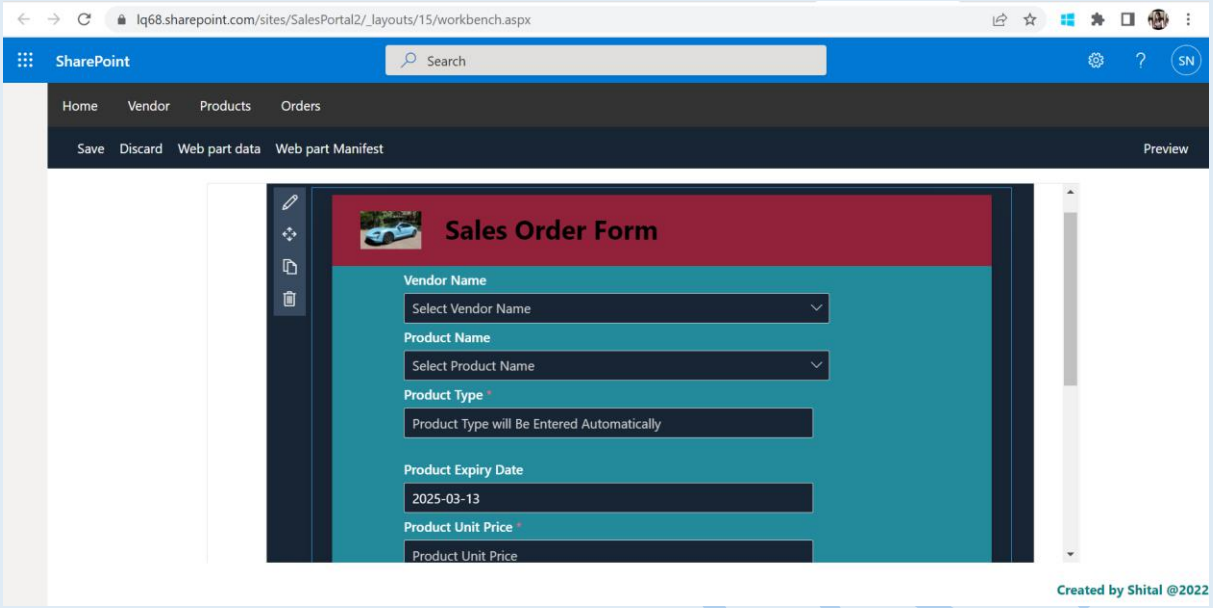


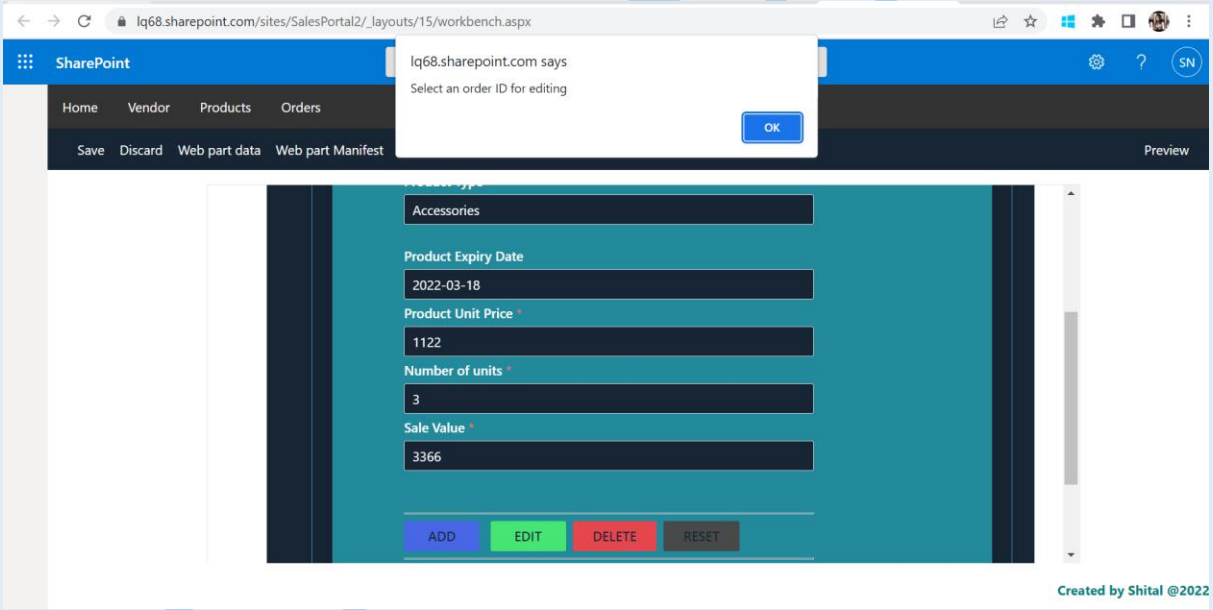


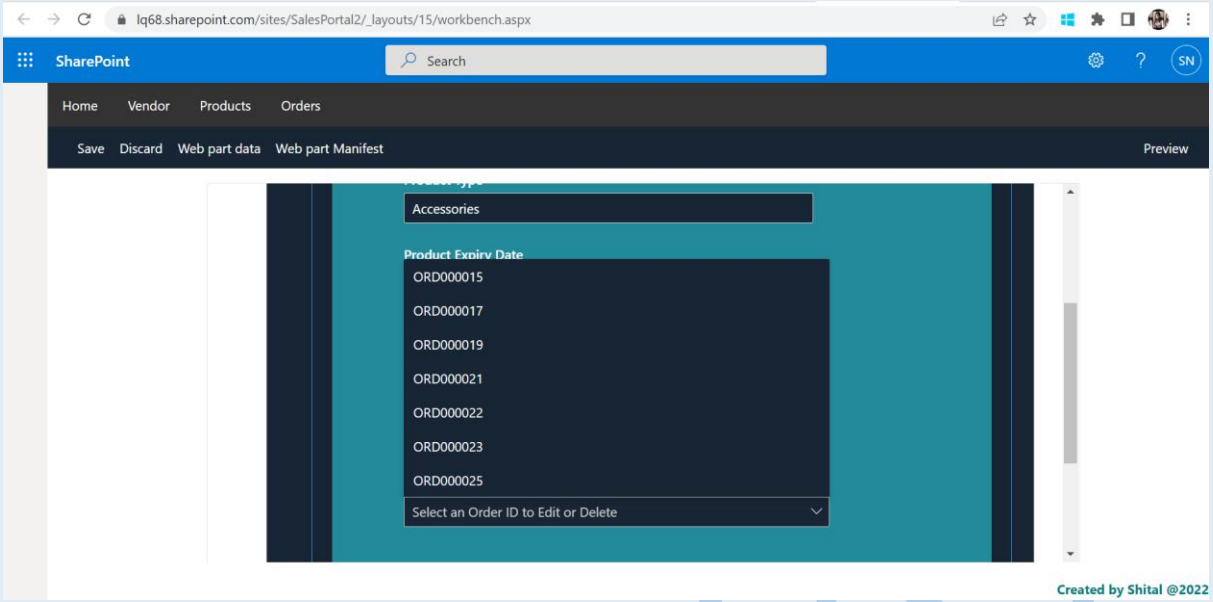
1. Add

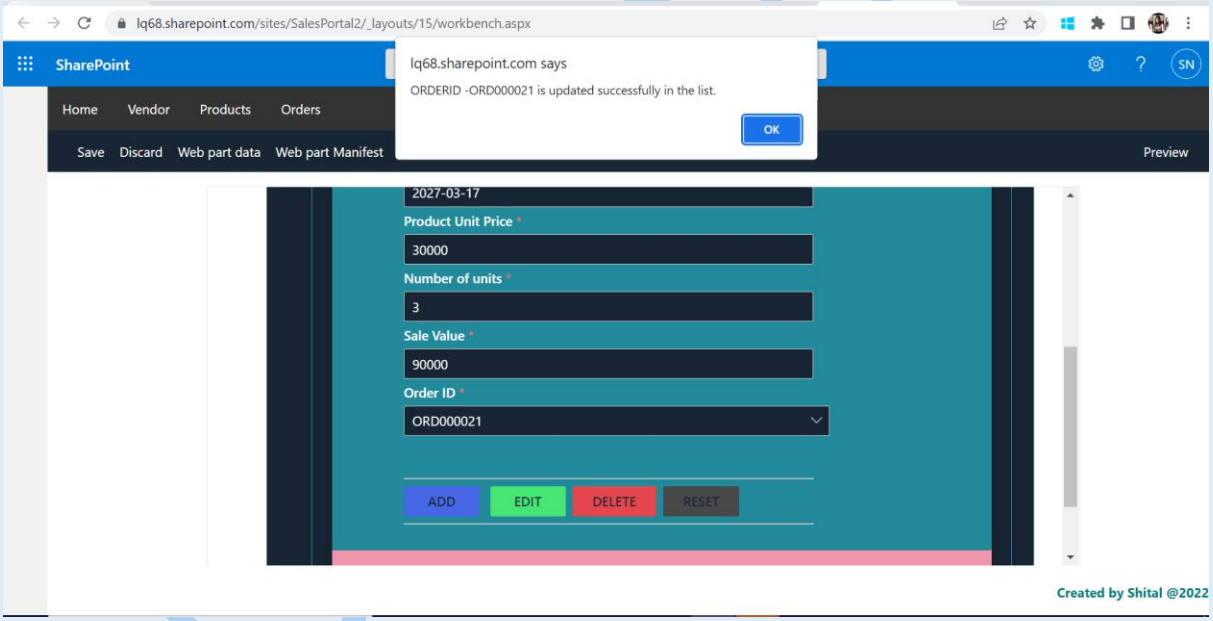


2. Update:


lq68.sharepoint.com/sites/SalesPortal2/_layouts/15/workbench.aspx
SharePoint
Search
SN
Home
Vendor
Products
Orders
Save
Discard
Web part data
Web part Manifest
Preview
Sales Order Form
Vendor Name
Select Vendor Name
Product Name
Select Product Name
Product Type *
Product Type will Be Entered Automatically
Product Expiry Date
2025-03-13
Product Unit Price *
Product Unit Price
Created by Shital @2022

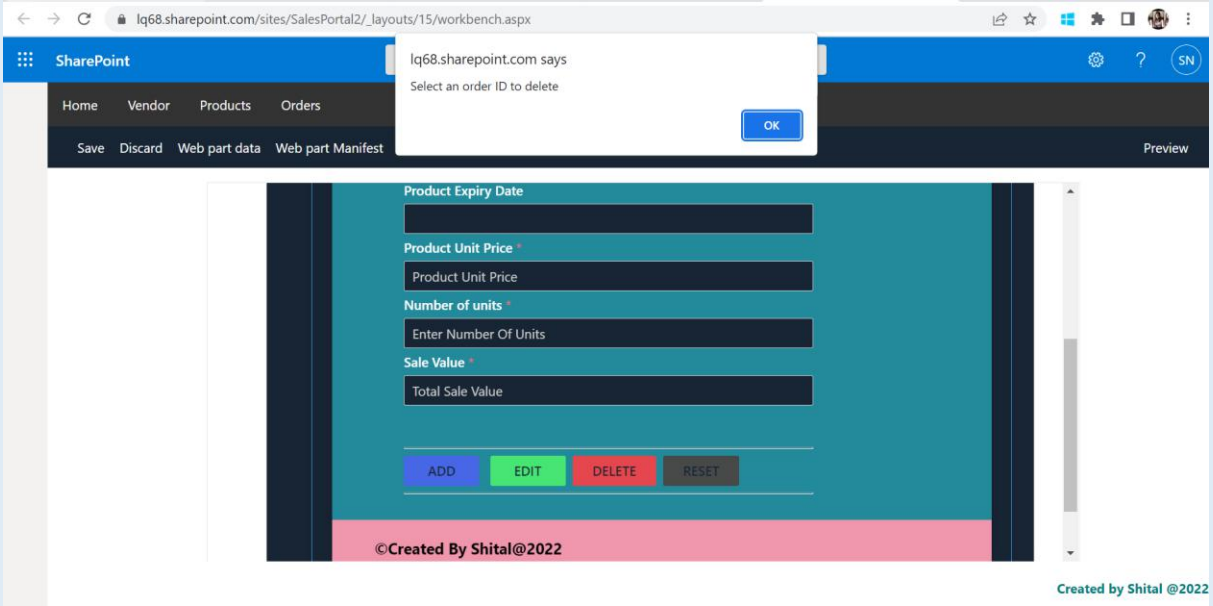

lq68.sharepoint.com/sites/SalesPortal2/_layouts/15/workbench.aspx
SharePoint
lq68.sharepoint.com says
Select an order ID for editing
OK
SN
Home
Vendor
Products
Orders
Save
Discard
Web part data
Web part Manifest
Preview
Accessories
Product Expiry Date
2022-03-18
Product Unit Price *
1122
Number of units *
3
Sale Value *
3366
ADD
EDIT
DELETE
RESET
Created by Shital @2022



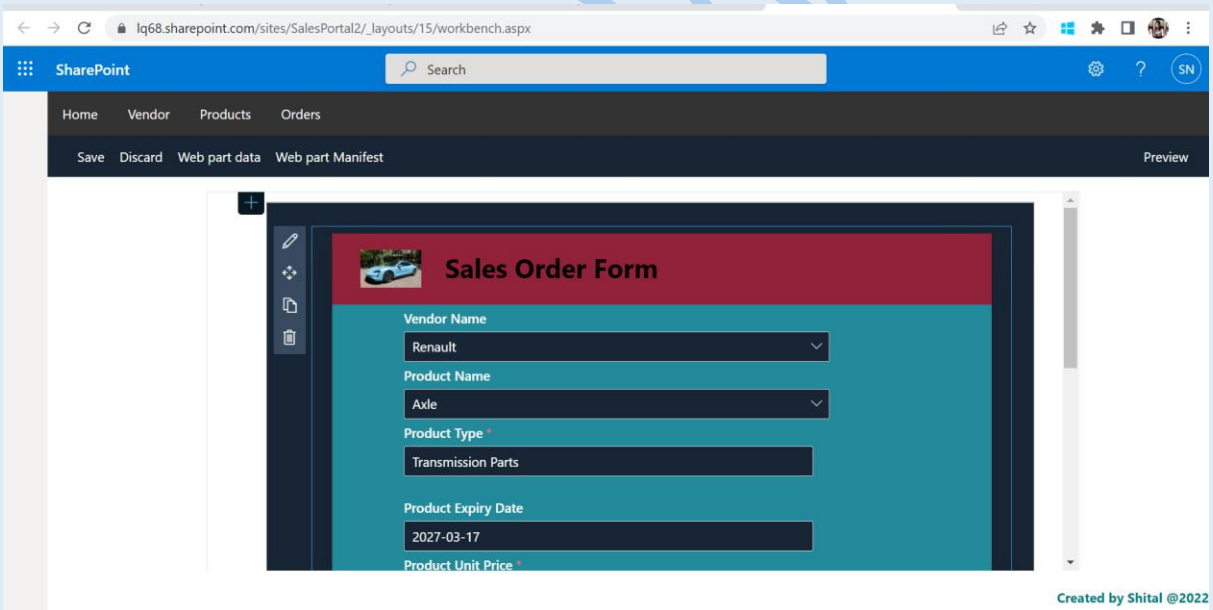


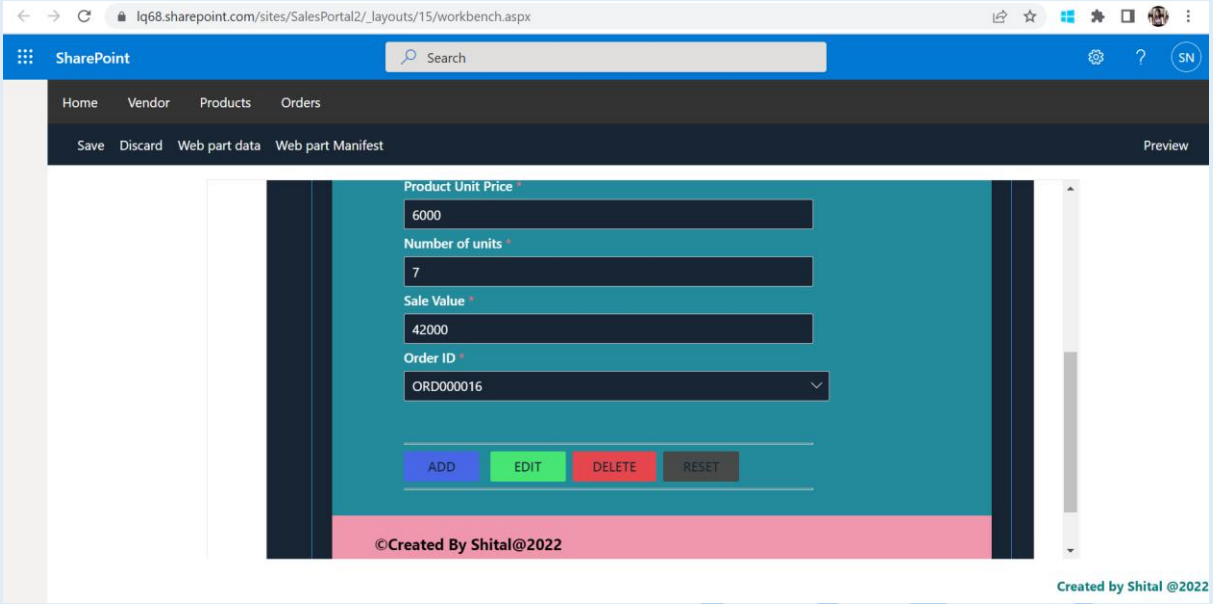
3. Delete

- On clicking the Delete button, we get a Popup to add the Order Id we need to delete:

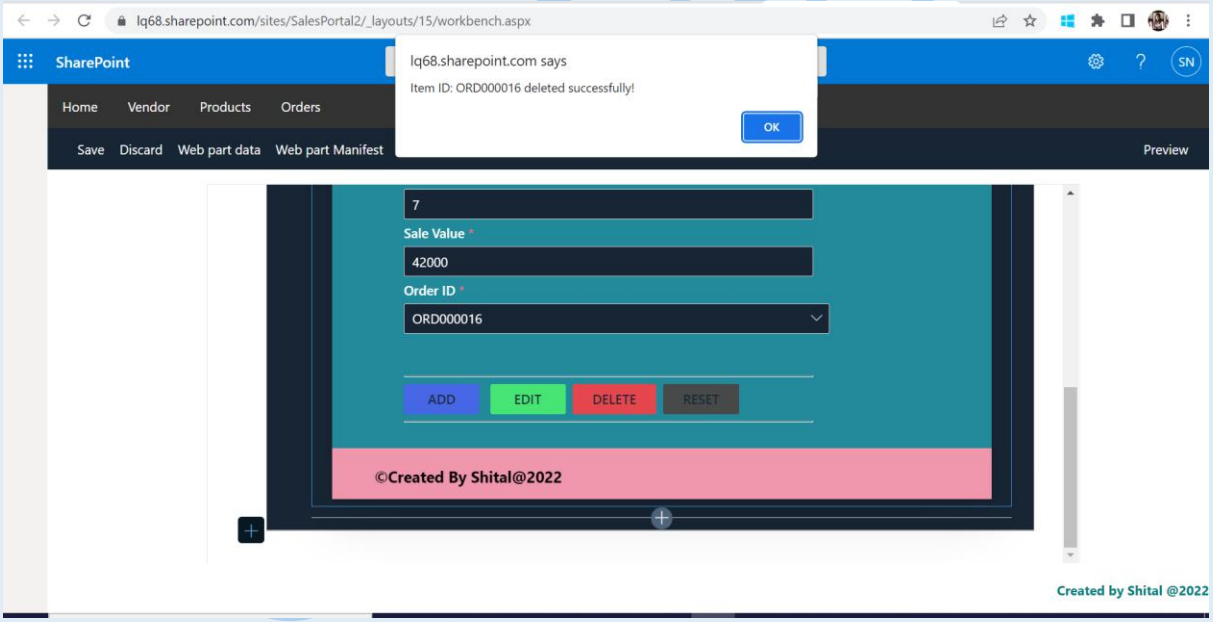


- Now the details of the selected order ID gets auto populated in the Sales Order Form.





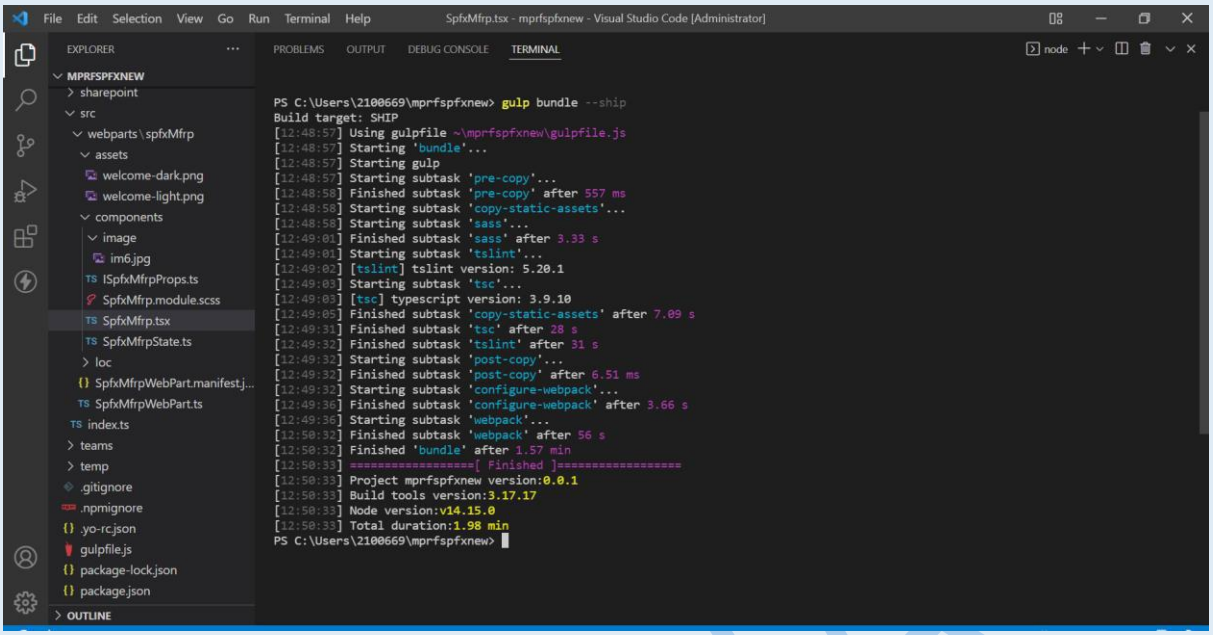
- And on clicking delete again we get this Popup that the order selected has been deleted from the list.



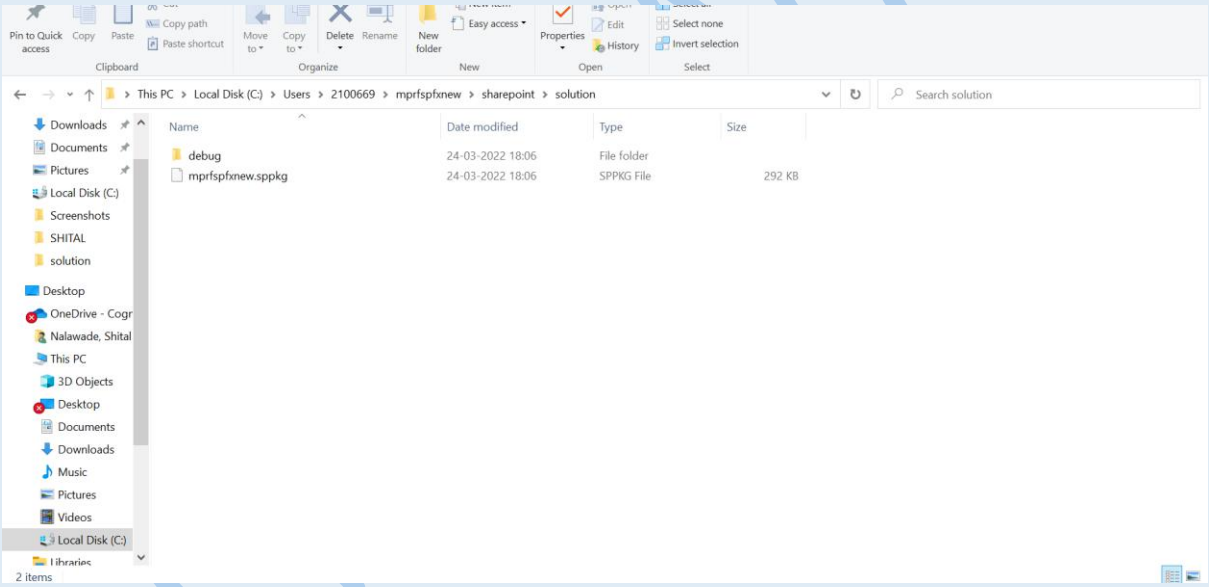
Deployment:

Once everything is working properly deploy the sppkg file to the app catalog

gulp bundle –ship: build localize and bundle the project.

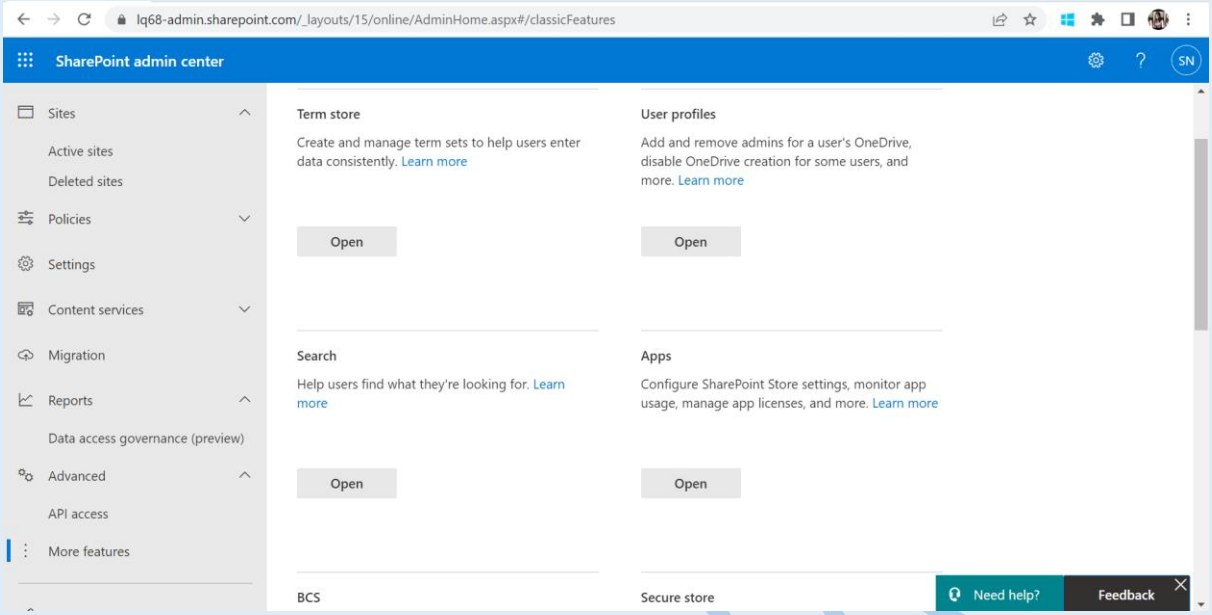


gulp package-solution –ship: package the project into SPPKG

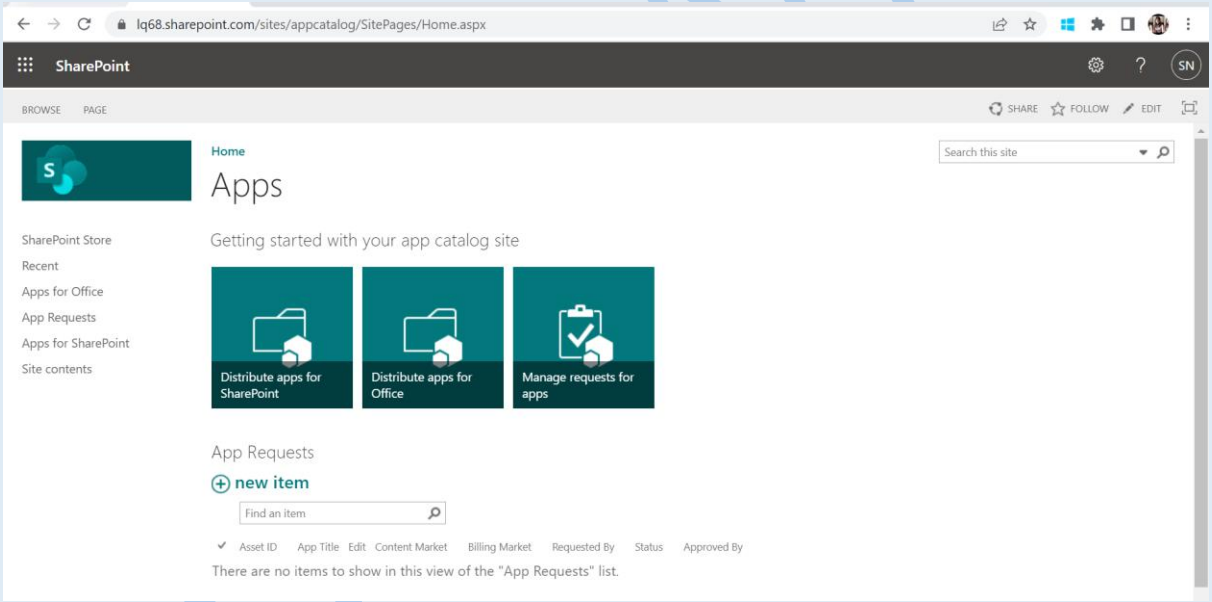


Configure App Catalogue:

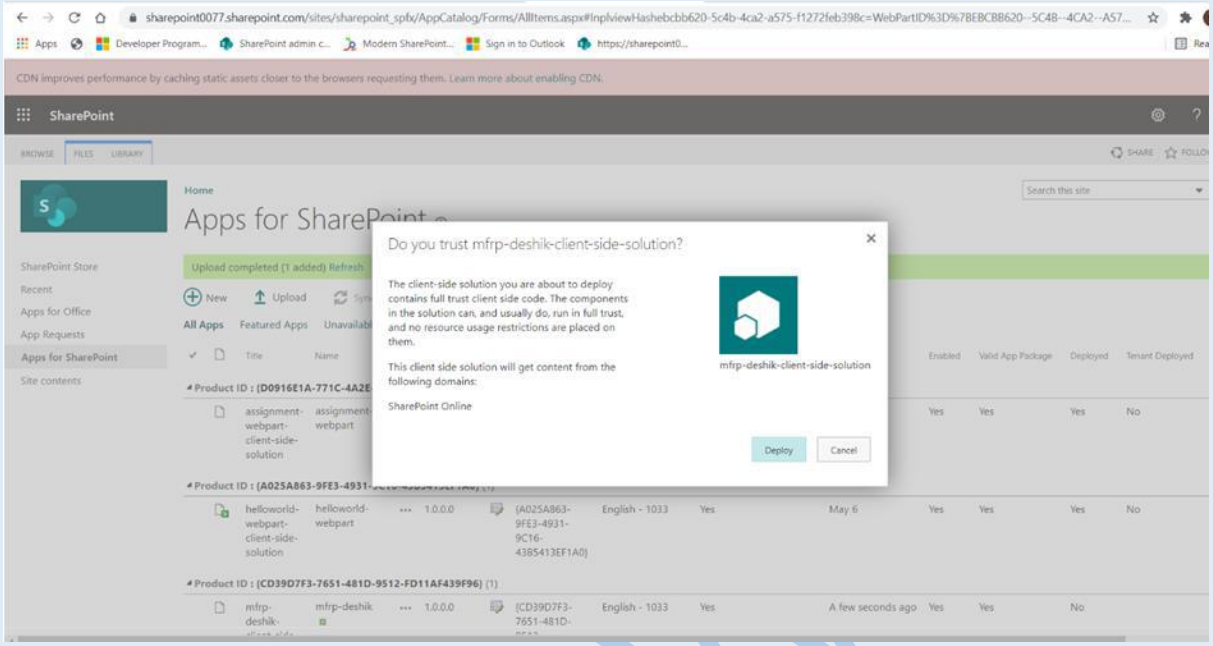
Open Sharepoint Admin

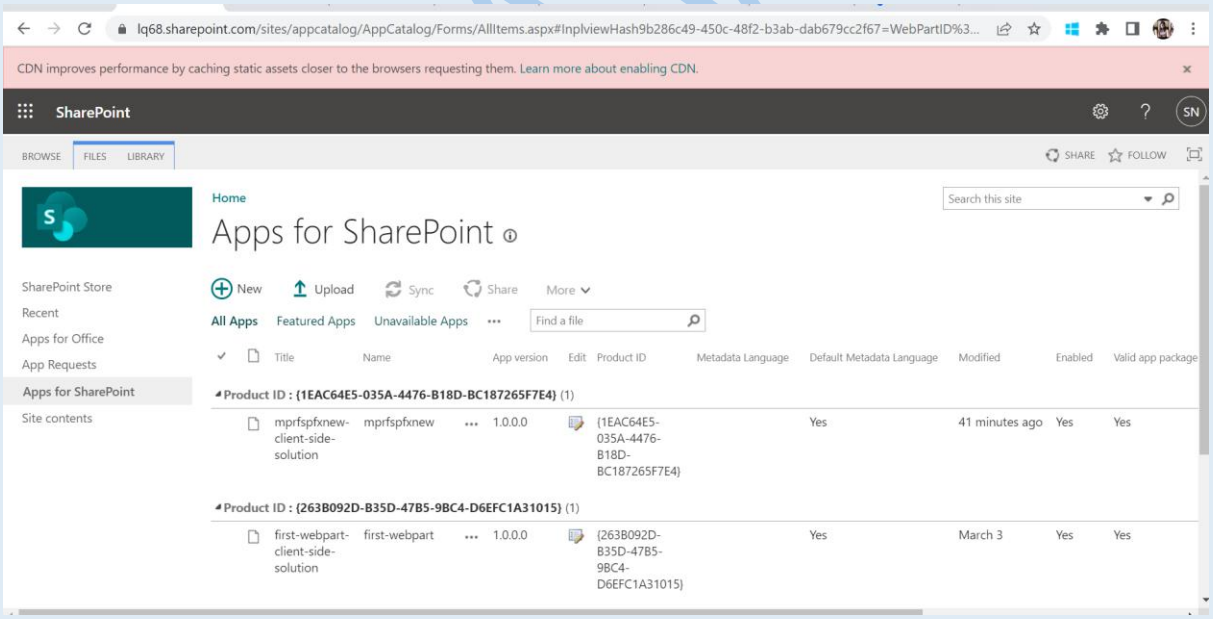


More Features > Apps > App Catalogue

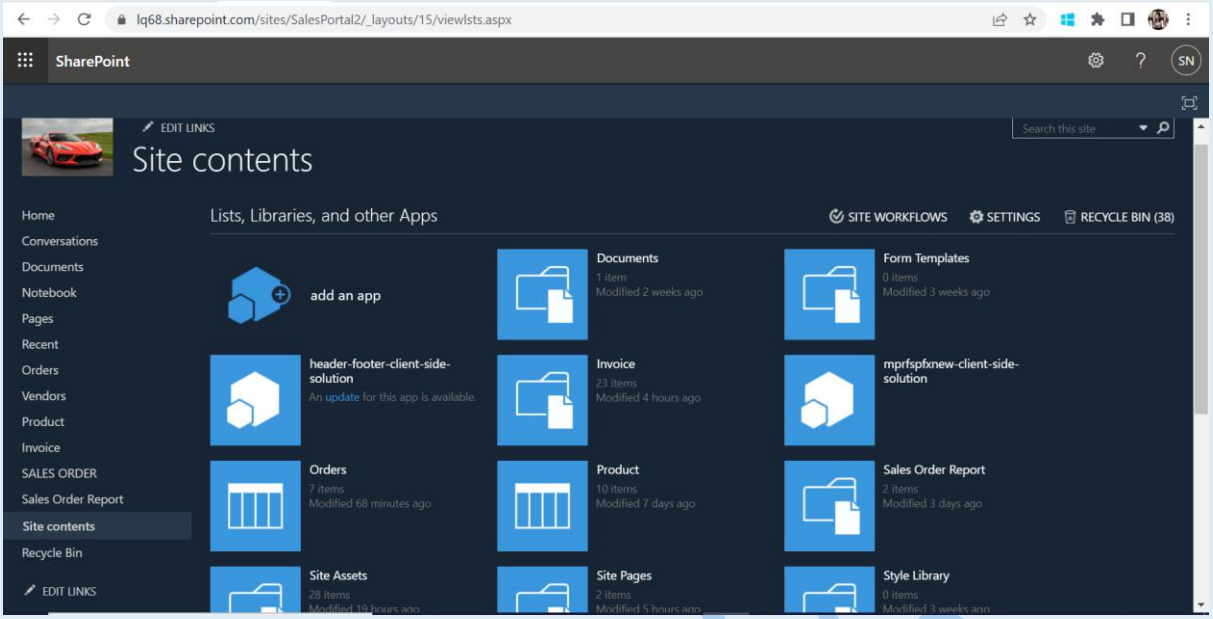


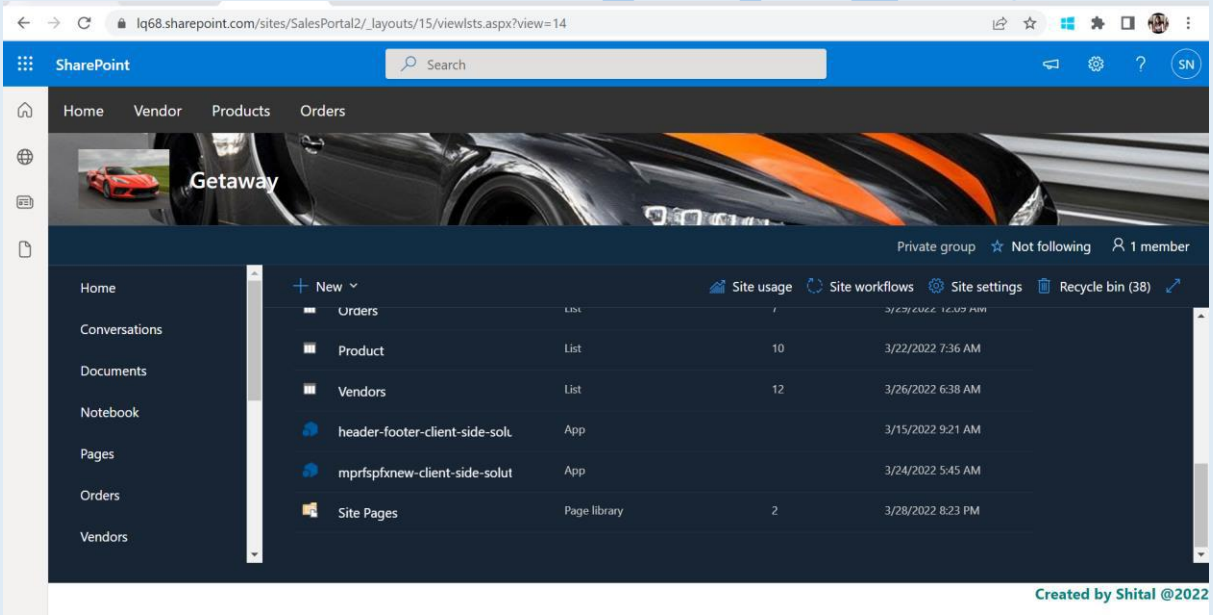
Apps for Sharepoint> Drop you .Sppkg File There> Deploy[Choose Yes]



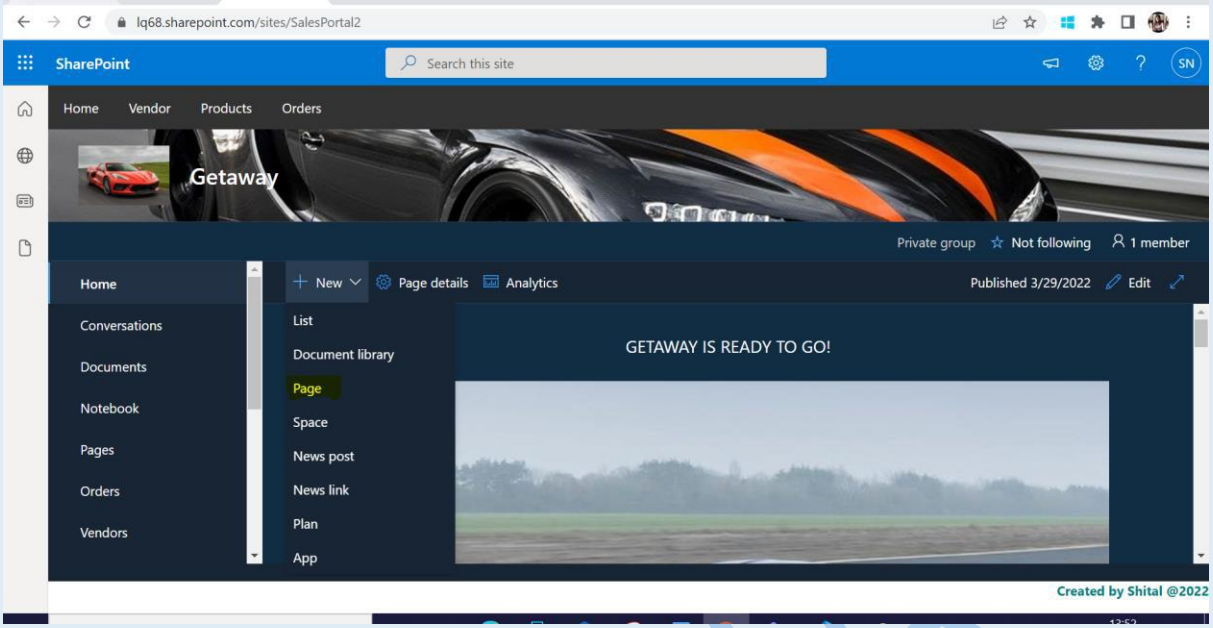


Site contents> Add App> mprfspfxnew-Client-Side-Solution

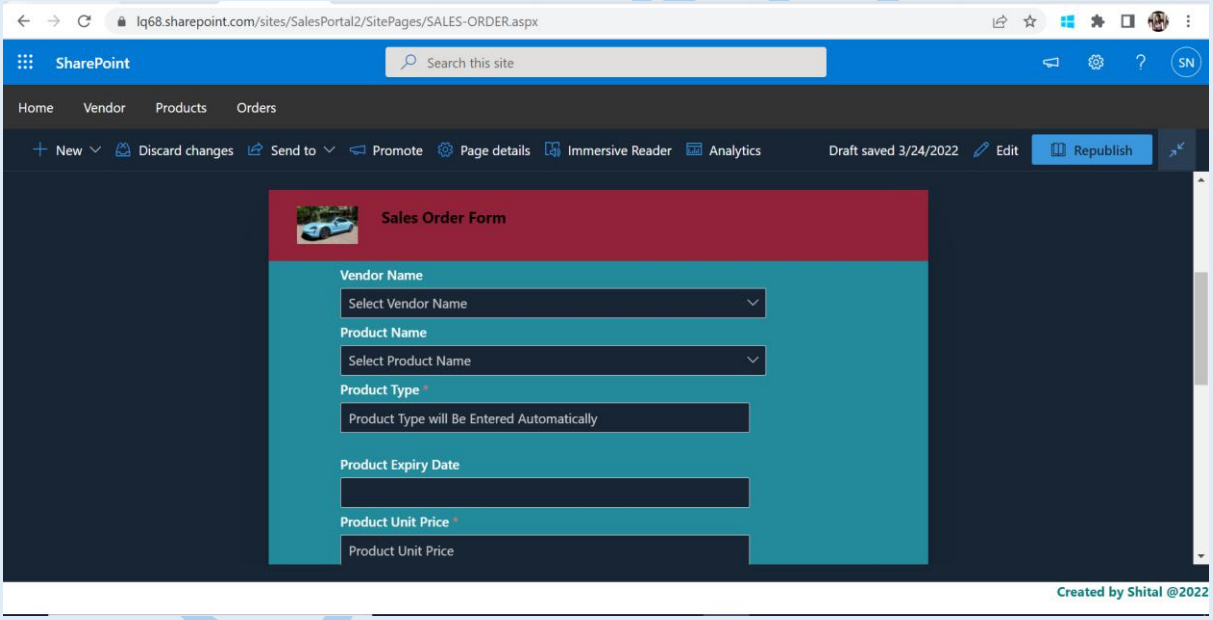


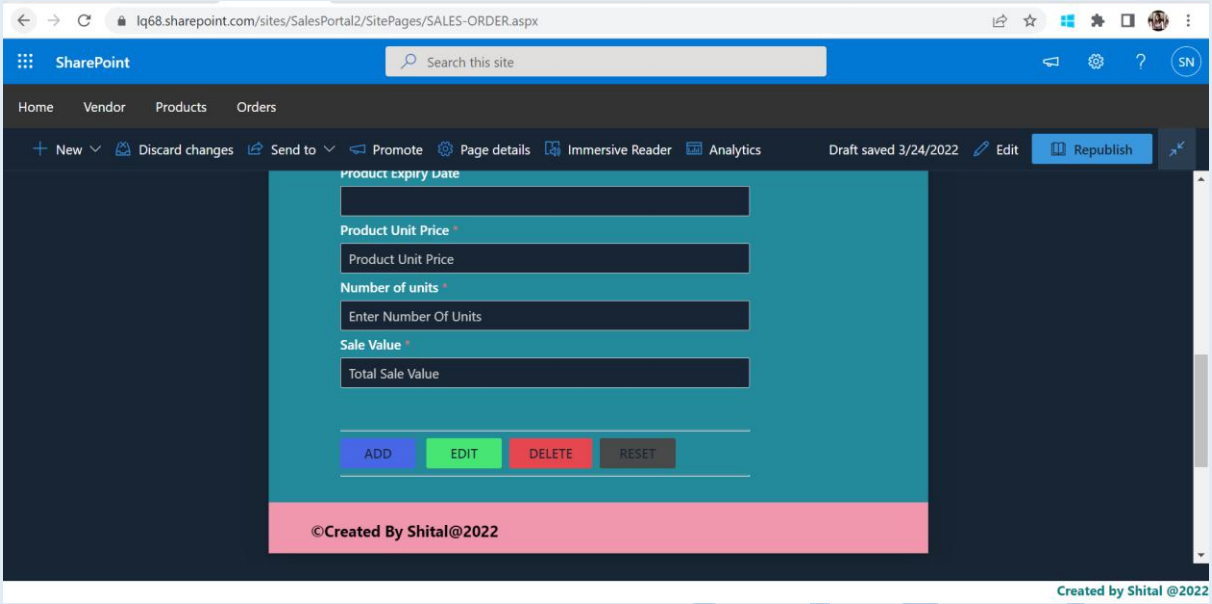


Make a webpart Page


lq68.sharepoint.com/sites/SalesPortal2
SharePoint
Search this site
SN
Home
Vendor
Products
Orders
Getaway
Private group
Not following
1 member
Home
Conversations
Documents
Notebook
Pages
Orders
Vendors
New
Page details
Analytics
Published 3/29/2022
Edit
List
Document library
Page
Space
News post
News link
Plan
App
GETAWAY IS READY TO GO!
Created by Shital @2022

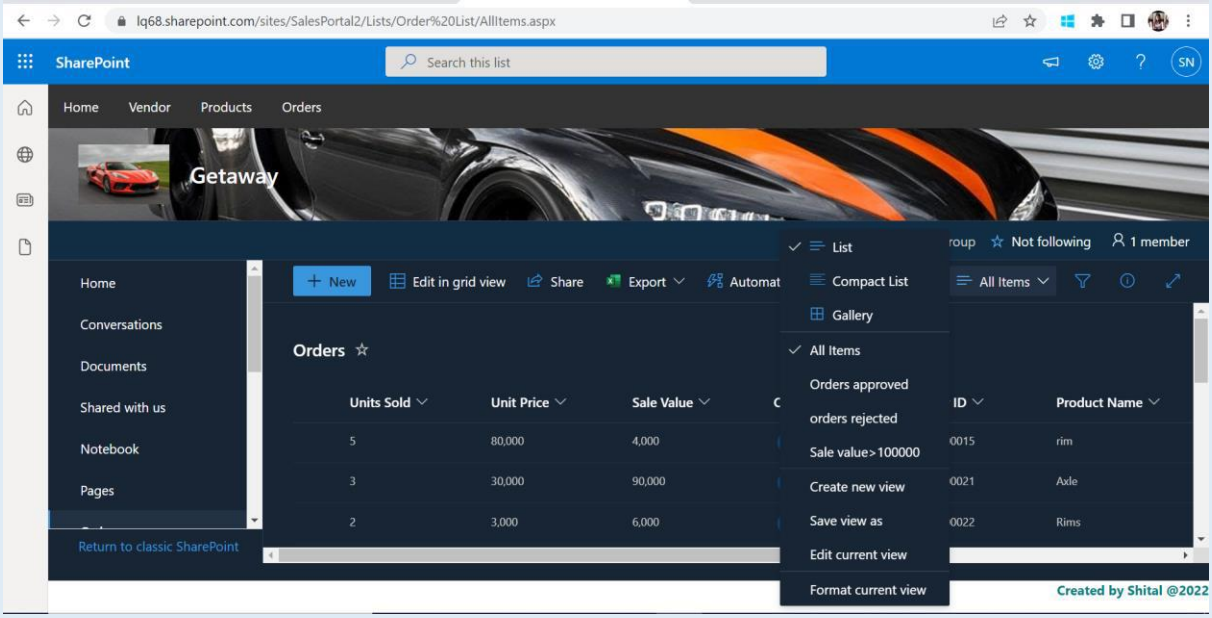
Deployed:


lq68.sharepoint.com/sites/SalesPortal2/SitePages/SALES-ORDER.aspx
SharePoint
Search this site
SN
Home
Vendor
Products
Orders
New
Discard changes
Send to
Promote
Page details
Immersive Reader
Analytics
Draft saved 3/24/2022
Edit
Republish
Sales Order Form
Vendor Name
Select Vendor Name
Product Name
Select Product Name
Product Type *
Product Type will Be Entered Automatically
Product Expiry Date
Product Unit Price *
Product Unit Price
Created by Shital @2022

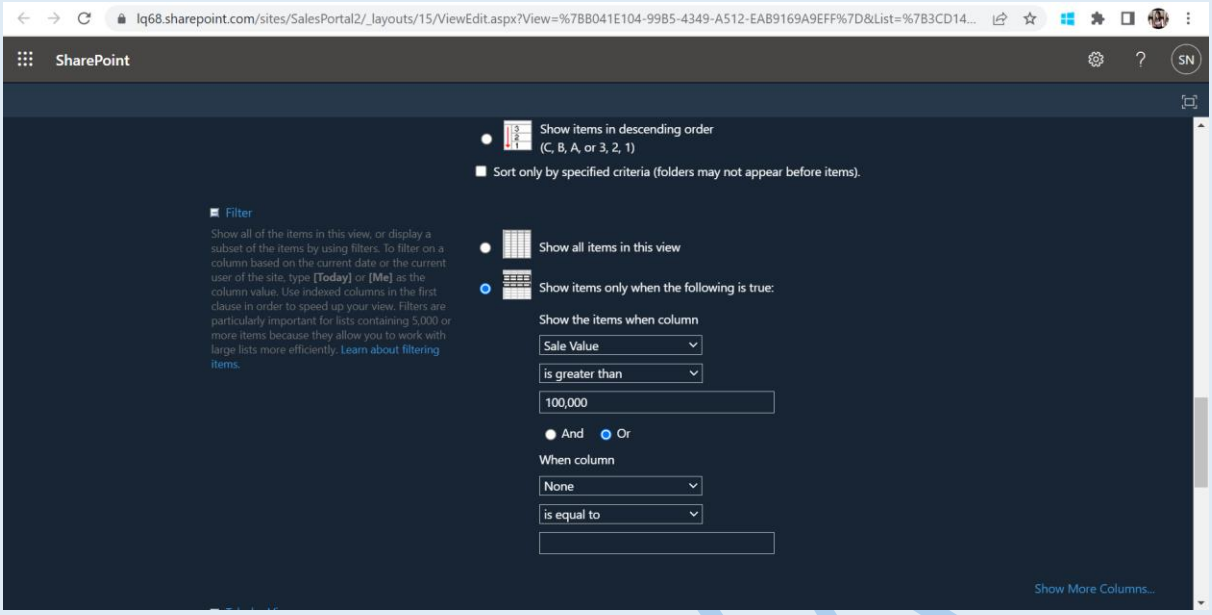


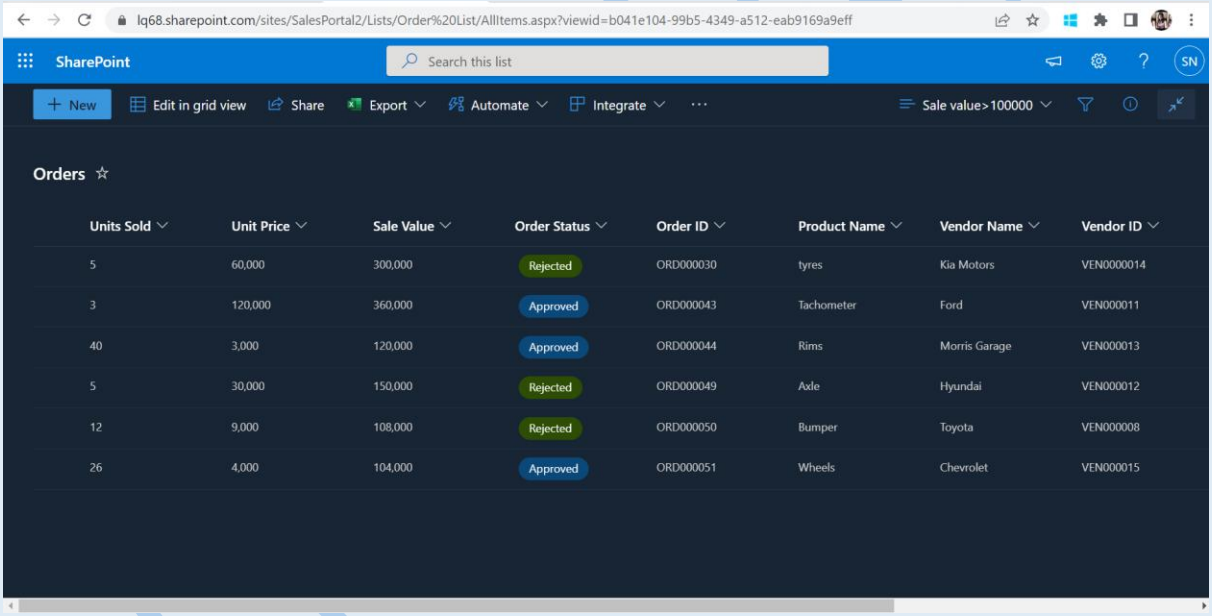
6. OOB Custom Views – Based on Vendor Name, Product Name, Date, Sales Value > 100000

Step 1: For Custom View into a list go to list settings > create view



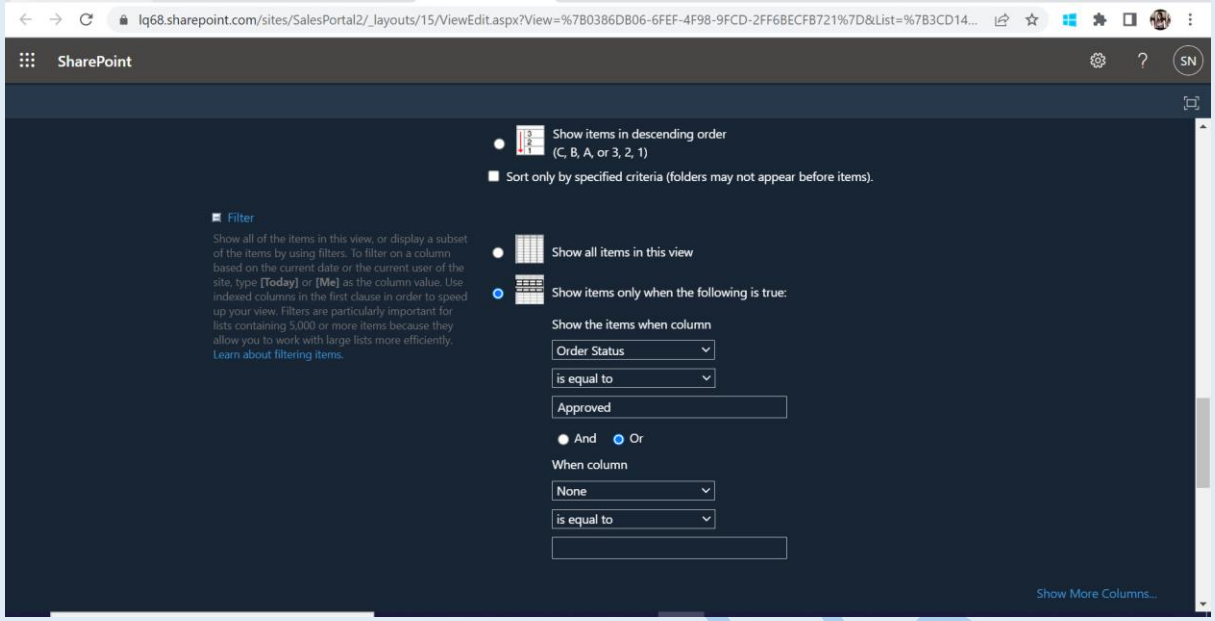
Step 2: Click on Standard View.
Give name to the view and the necessary filter. i.e Sale Value > 100000 then only the column values will be displayed

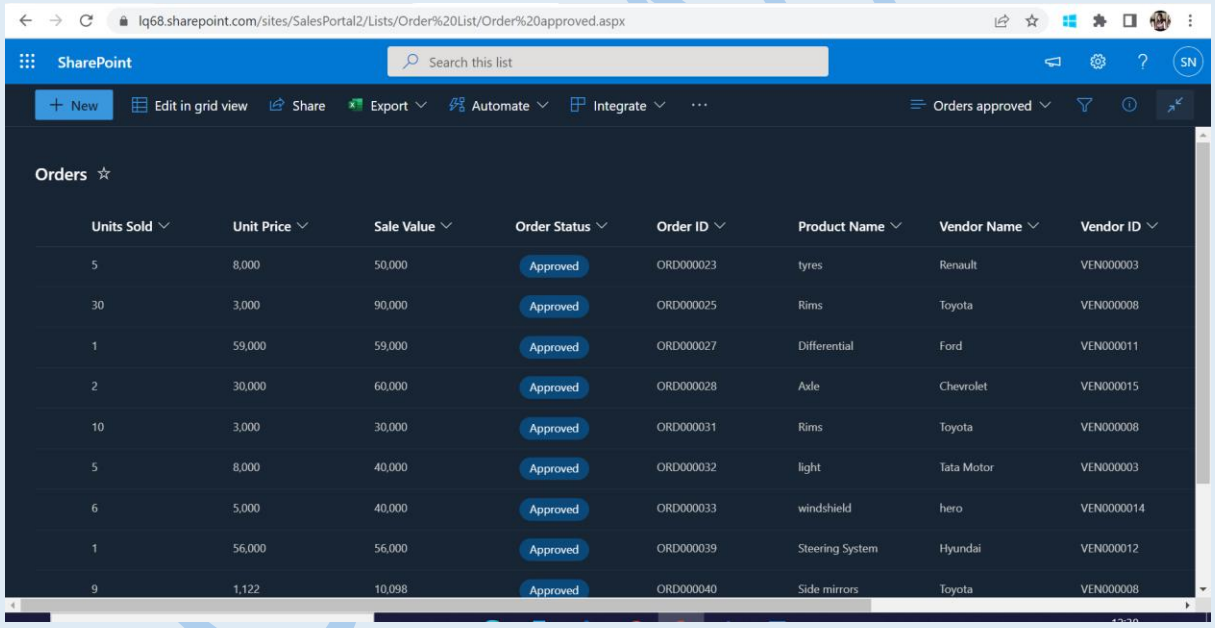




Units Sold	Unit Price	Sale Value	Order Status	Order ID	Product Name	Vendor Name	Vendor ID
5	60,000	300,000	Rejected	ORD000030	tyres	Kia Motors	VEN0000014
3	120,000	360,000	Approved	ORD000043	Tachometer	Ford	VEN000011
40	3,000	120,000	Approved	ORD000044	Rims	Morris Garage	VEN000013
5	30,000	150,000	Rejected	ORD000049	Axle	Hyundai	VEN000012
12	9,000	108,000	Rejected	ORD000050	Bumper	Toyota	VEN000008
26	4,000	104,000	Approved	ORD000051	Wheels	Chevrolet	VEN000015

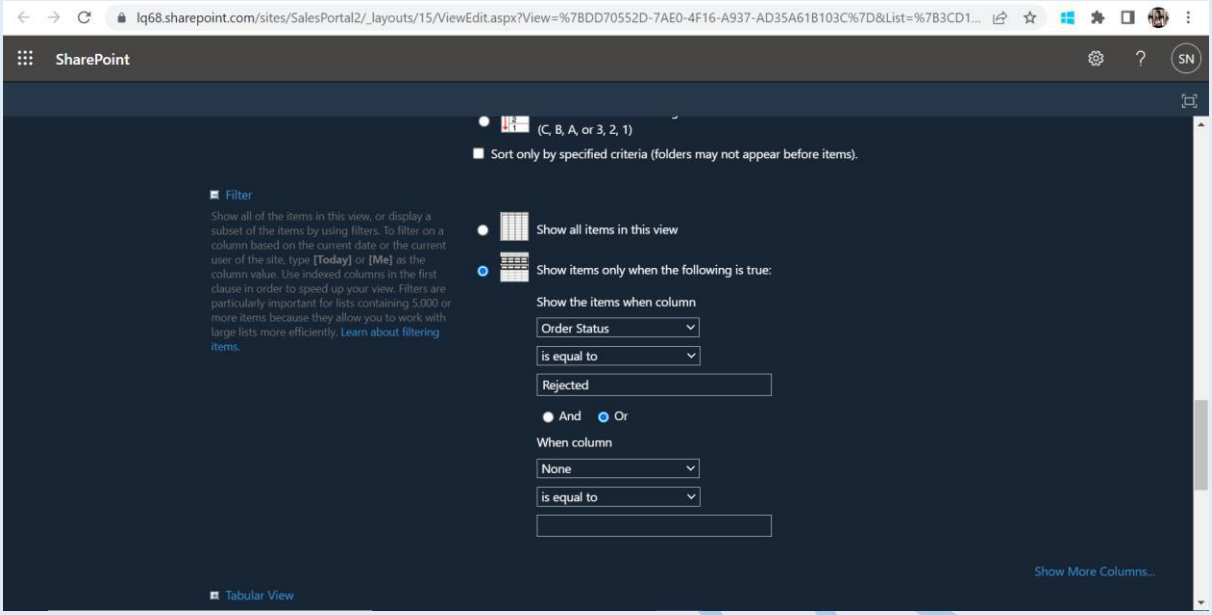
Similarly for status approved:

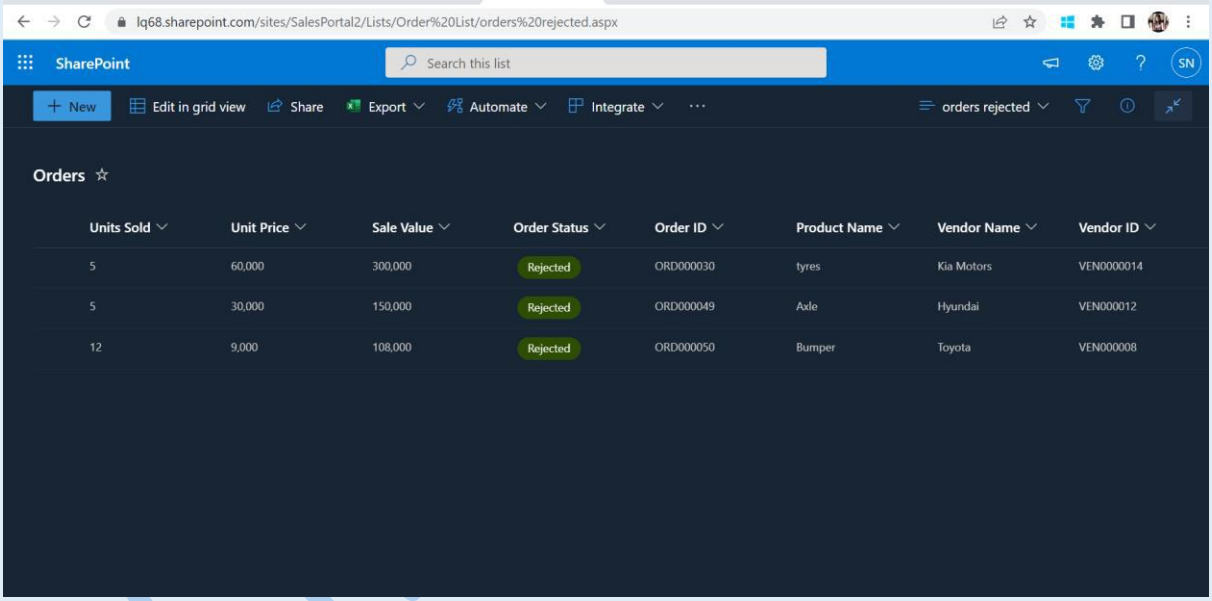




Units Sold	Unit Price	Sale Value	Order Status	Order ID	Product Name	Vendor Name	Vendor ID
5	8,000	50,000	Approved	ORD000023	tyres	Renault	VEN000003
30	3,000	90,000	Approved	ORD000025	Rims	Toyota	VEN000008
1	59,000	59,000	Approved	ORD000027	Differential	Ford	VEN000011
2	30,000	60,000	Approved	ORD000028	Axle	Chevrolet	VEN000015
10	3,000	30,000	Approved	ORD000031	Rims	Toyota	VEN000008
5	8,000	40,000	Approved	ORD000032	light	Tata Motor	VEN000003
6	5,000	40,000	Approved	ORD000033	windshield	hero	VEN0000014
1	56,000	56,000	Approved	ORD000039	Steering System	Hyundai	VEN000012
9	1,122	10,098	Approved	ORD000040	Side mirrors	Toyota	VEN000008

Similarly for status rejected:





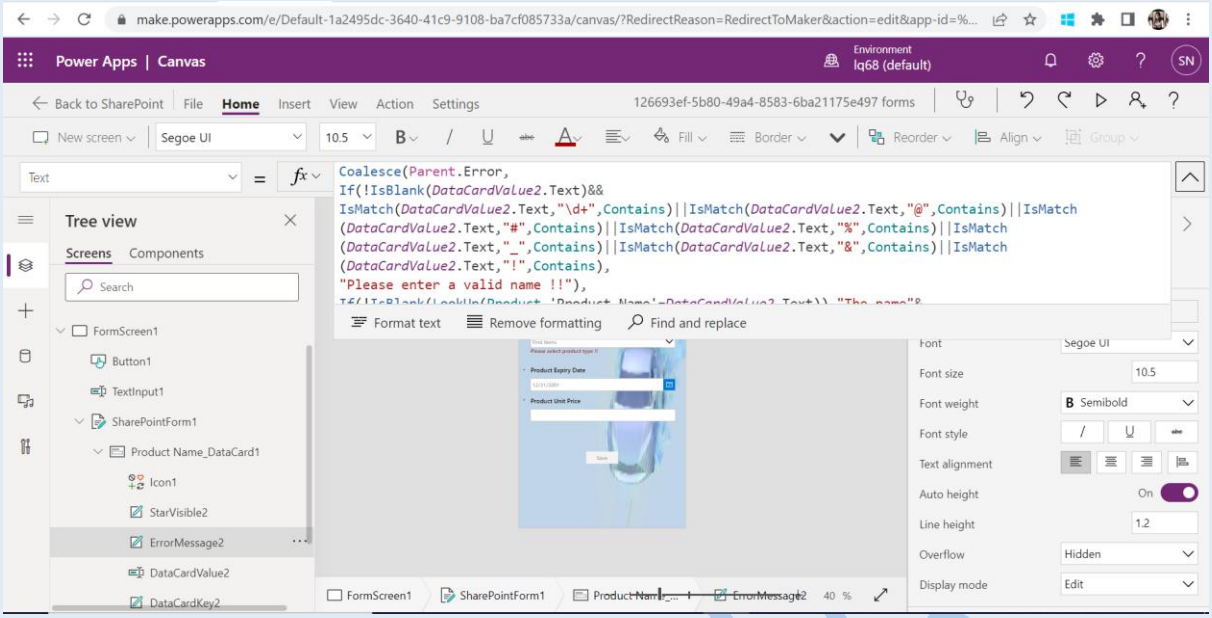
Hence, we have created OOB Custom Views

7. Add appropriate validation in all OOB Lists using power apps and also the validations on client side

1)

Product List:

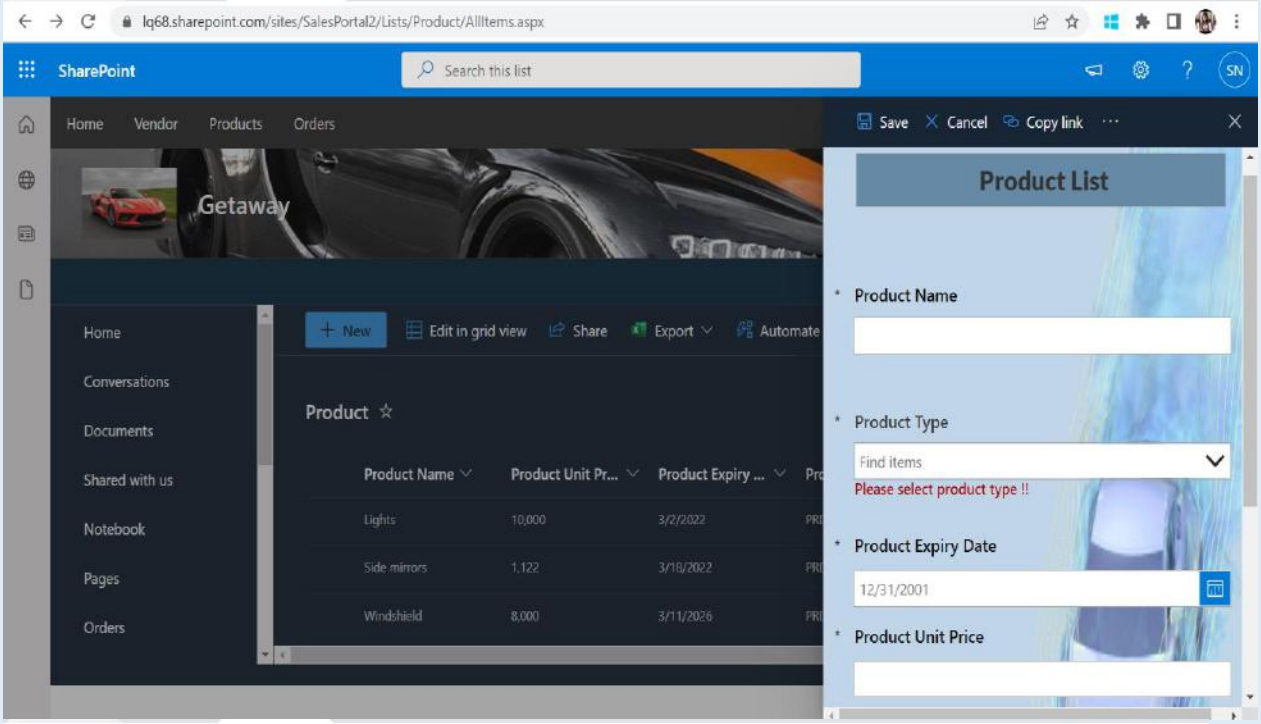
Step 1: Click Integrate>Power Apps> Customize form.

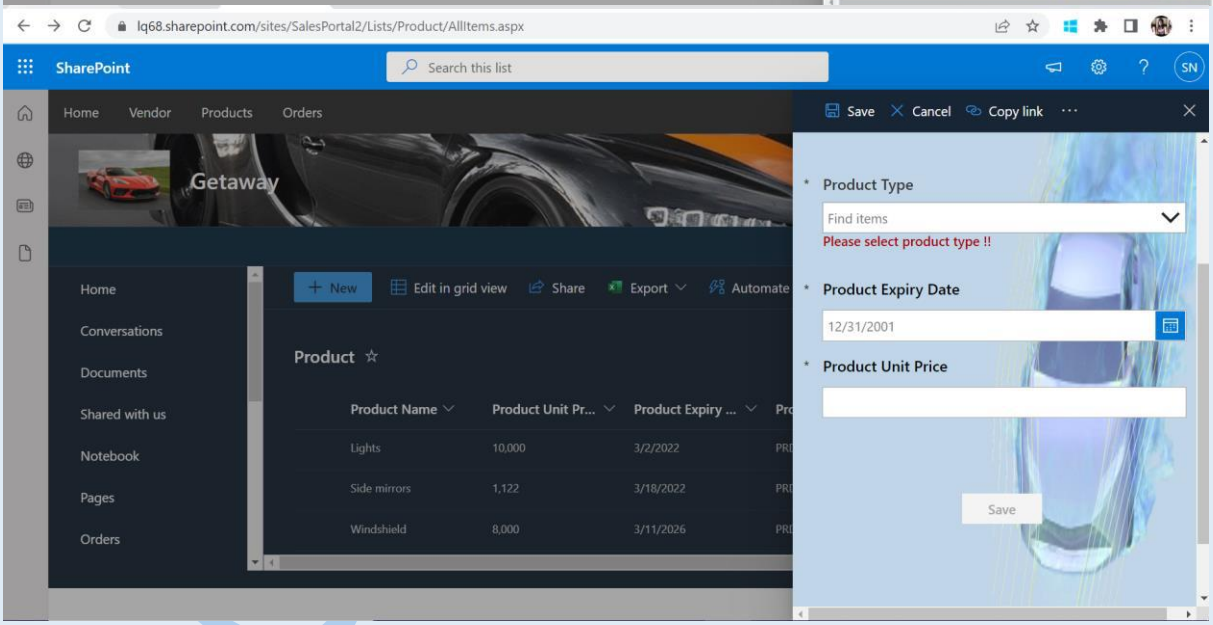


Step 2: Click on SharePointIntegration>write the below formula in on product name and product unit price (Error message2) text box.

```
Coalesce(Parent.Error,
If(!IsBlank(DataCardValue2.Text)&&
IsMatch(DataCardValue2.Text,"\d+",Contains)||IsMatch(DataCardValue2.Text,"@",Contains)||IsMatch
(DataCardValue2.Text,"#",Contains)||IsMatch(DataCardValue2.Text,"%",Contains)||IsMatch
(DataCardValue2.Text,"_",Contains)||IsMatch(DataCardValue2.Text,"&",Contains)||IsMatch
(DataCardValue2.Text,"!",Contains),
"Please enter a valid name !!"),
If(!IsBlank(LookUp(Product,'Product Name'=DataCardValue2.Text)),"The name"&
DataCardValue2&" already exist")
)
```

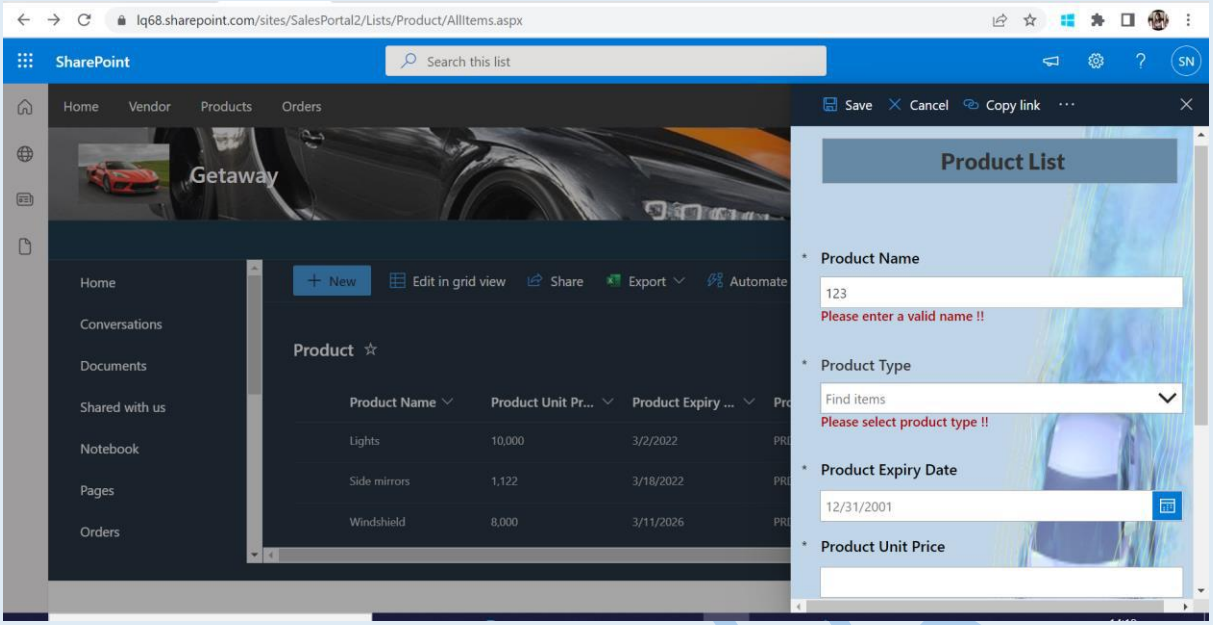
GETAWA

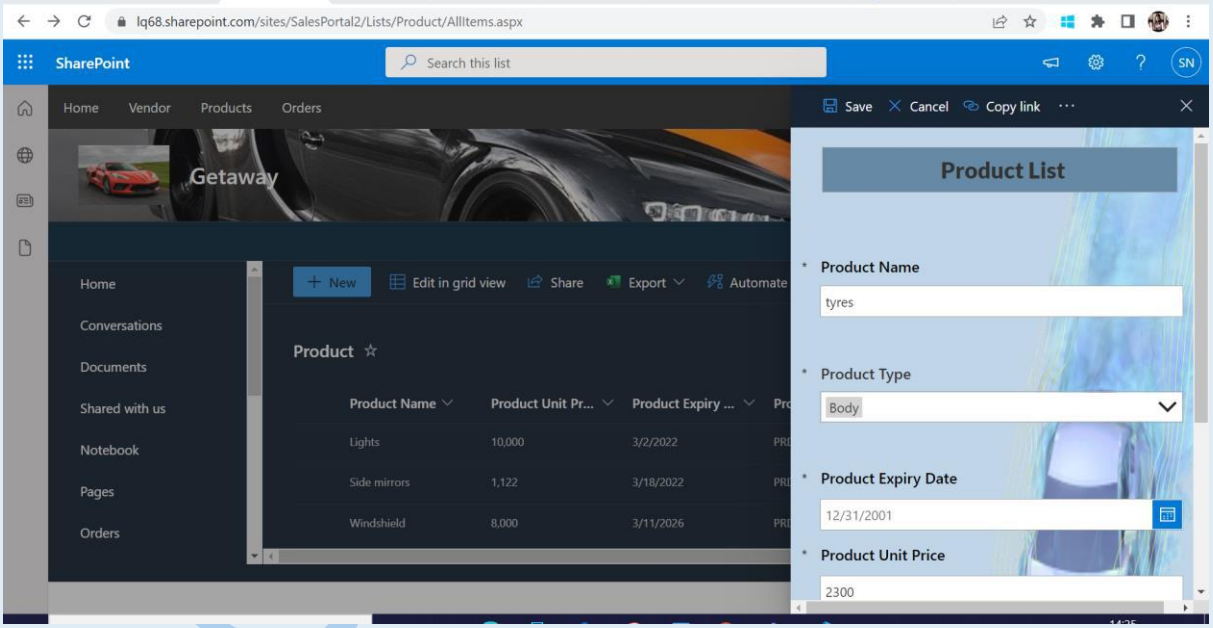




Step 3: Now save the Form and publish it to use it.

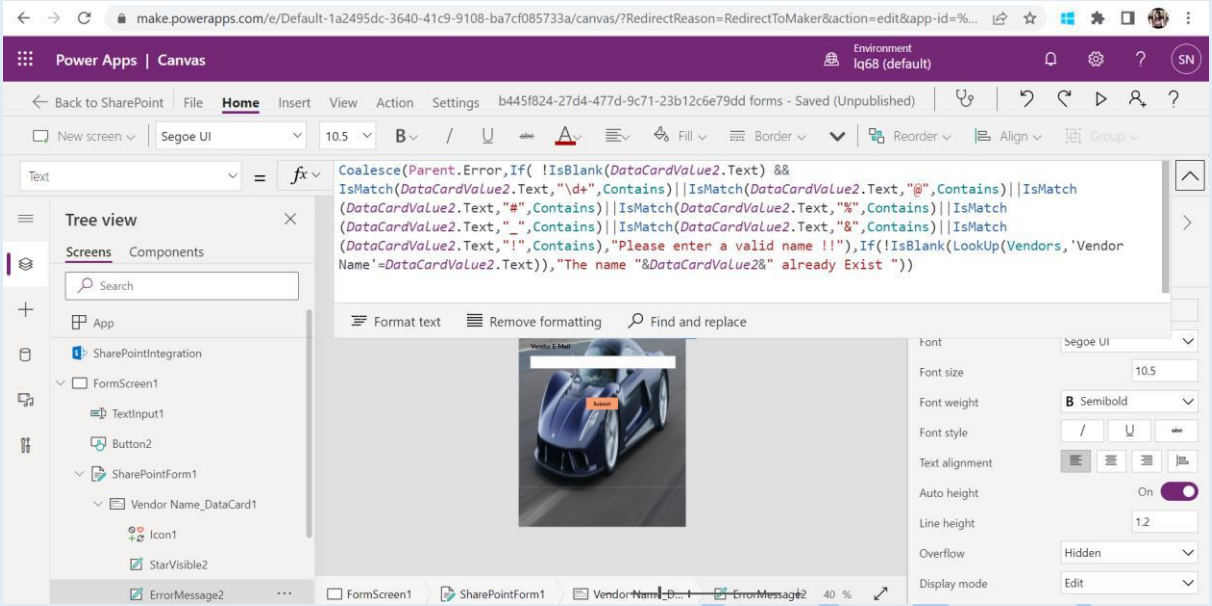
Validation:

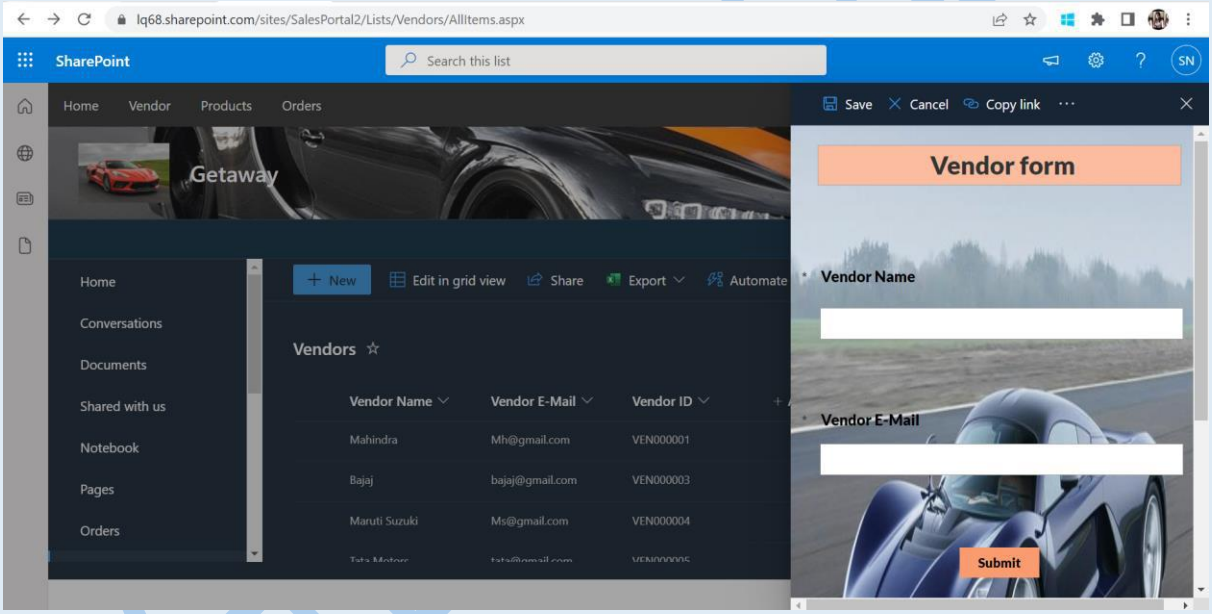


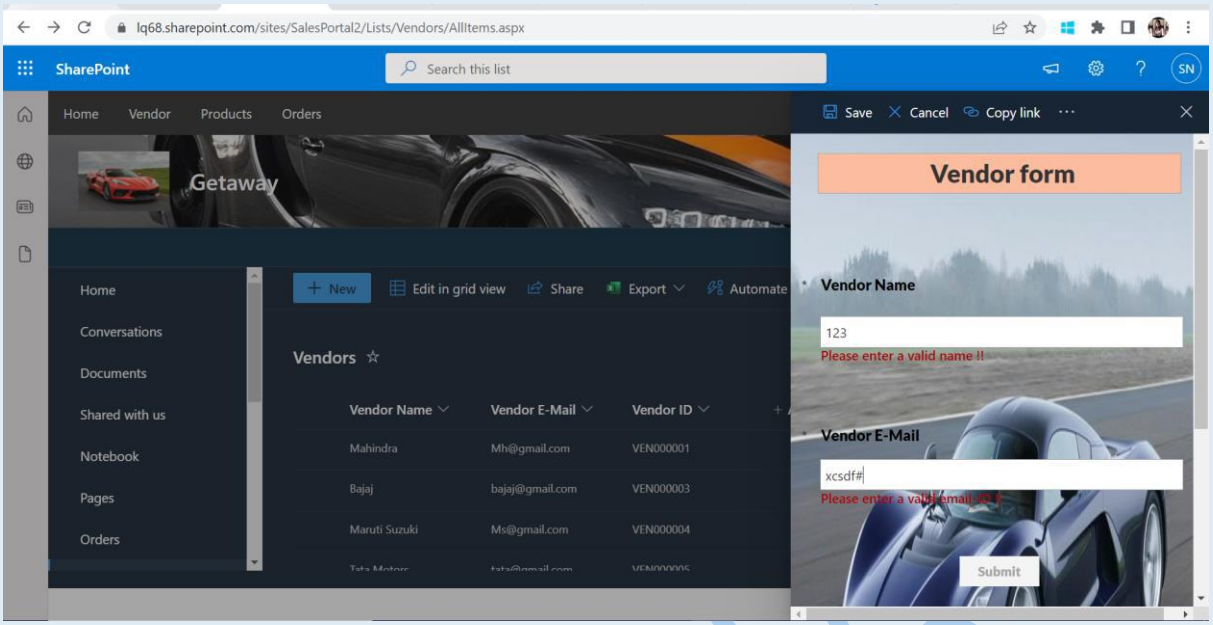


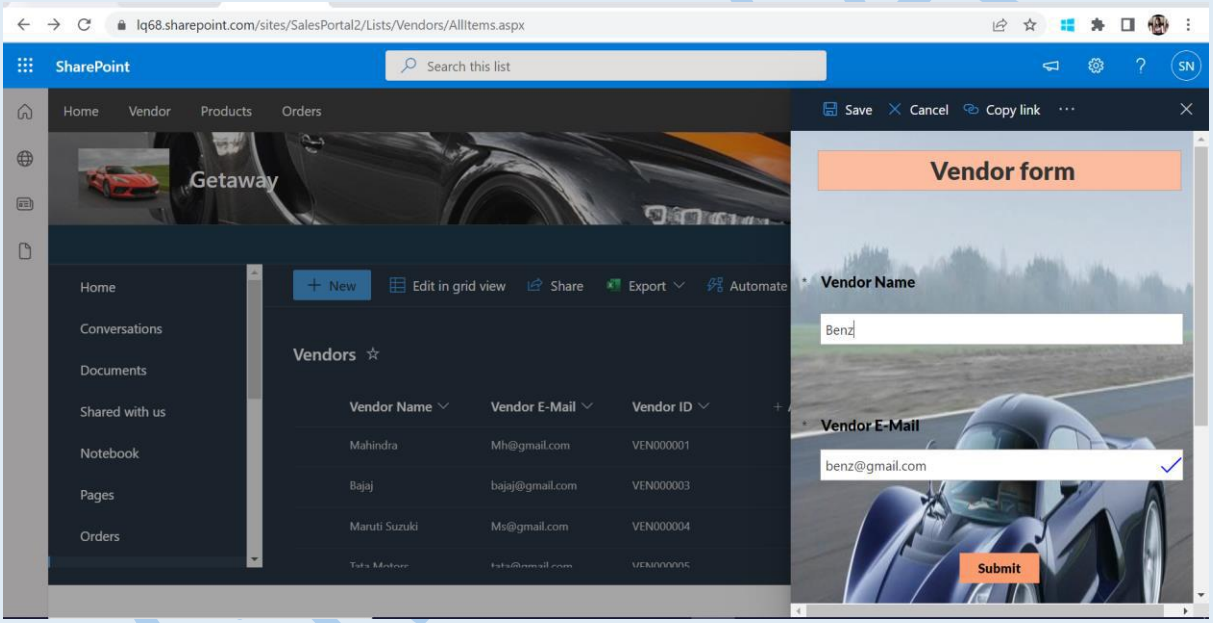
Vendor List:

Steps are the same as that for Product list. Below is the formula to be inserted for Vendor name and vendor email id.


make.powerapps.com/e/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/canvas/?RedirectReason=RedirectToMaker&action=edit&app-id=%...
Power Apps | Canvas
Environment
lq68 (default)
Back to SharePoint
File
Home
Insert
View
Action
Settings
b445f824-27d4-477d-9c71-23b12c6e79dd forms - Saved (Unpublished)
New screen
Segoe UI
10.5
Fill
Border
Reorder
Align
Group
Text
Coalesce(Parent.Error,If(!IsBlank(DataCardValue2.Text) &&
IsMatch(DataCardValue2.Text,"\d+",Contains)||IsMatch(DataCardValue2.Text,"@",Contains)||IsMatch
(DataCardValue2.Text,"#",Contains)||IsMatch(DataCardValue2.Text,"%",Contains)||IsMatch
(DataCardValue2.Text,"_",Contains)||IsMatch(DataCardValue2.Text,"&",Contains)||IsMatch
(DataCardValue2.Text,"!",Contains),"Please enter a valid name !!"),If(!IsBlank(LookUp(Vendors,'Vendor
Name'=DataCardValue2.Text)),"The name "&DataCardValue2&" already Exist "))
Tree view
Screens
Components
Search
App
SharePointIntegration
FormScreen1
TextInput1
Button2
SharePointForm1
Vendor Name_DataCard1
Icon1
StarVisible2
ErrorMessage2
Format text
Remove formatting
Find and replace
Font
Segoe UI
Font size
10.5
Font weight
Semibold
Font style
Text alignment
Auto height
On
Line height
1.2
Overflow
Hidden
Display mode
Edit
FormScreen1
SharePointForm1
ErrorMessage2
40 %


lq68.sharepoint.com/sites/SalesPortal2/Lists/Vendors/AllItems.aspx
SharePoint
Search this list
Home
Vendor
Products
Orders
Save
Cancel
Copy link
Getaway
Vendor form
Home
Conversations
Documents
Shared with us
Notebook
Pages
Orders
New
Edit in grid view
Share
Export
Automate
Vendors
Vendor Name
Vendor E-Mail
Vendor ID
Mahindra
Mh@gmail.com
VEN000001
Bajaj
bajaj@gmail.com
VEN000003
Maruti Suzuki
Ms@gmail.com
VEN000004
Vendor Name
Vendor E-Mail
Submit


lq68.sharepoint.com/sites/SalesPortal2/Lists/Vendors/AllItems.aspx
SharePoint
Search this list
SN
Home
Vendor
Products
Orders
Save
Cancel
Copy link
Getaway
Vendor form
Home
Conversations
Documents
Shared with us
Notebook
Pages
Orders
New
Edit in grid view
Share
Export
Automate
Vendors
Vendor Name
Vendor E-Mail
Vendor ID
Mahindra
Mh@gmail.com
VEN000001
Bajaj
bajaj@gmail.com
VEN000003
Maruti Suzuki
Ms@gmail.com
VEN000004
Vendor Name
123
Please enter a valid name !!
Vendor E-Mail
xcsdf#
Submit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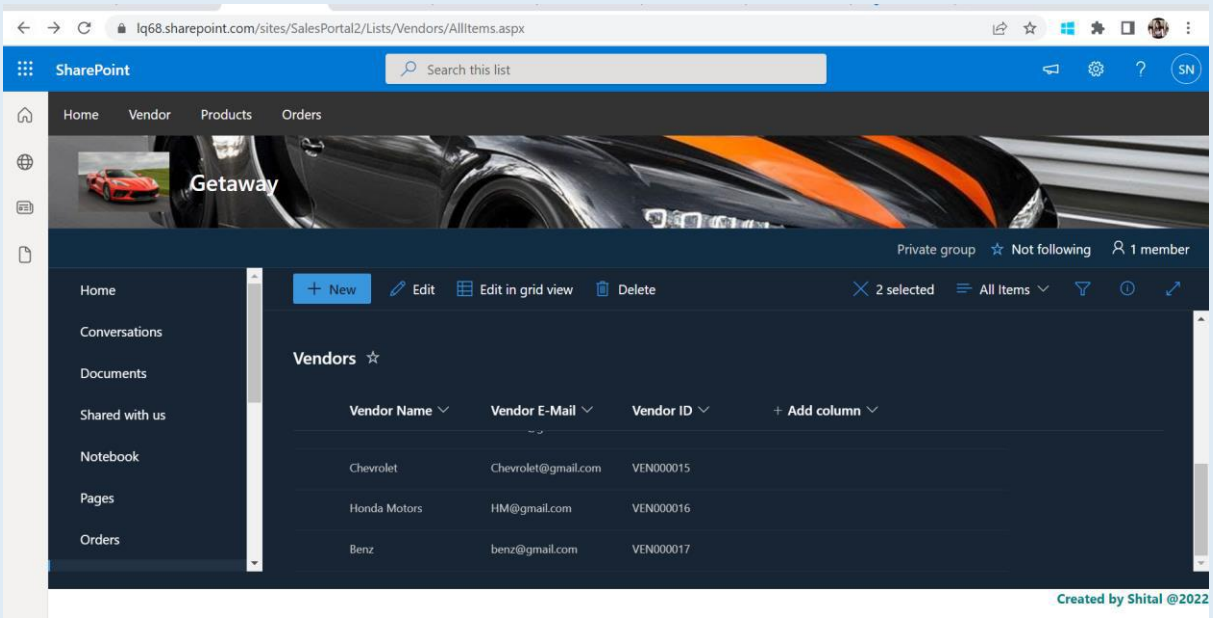
SharePoint
Search this list
SN
Home
Vendor
Products
Orders
Save
Cancel
Copy link
Getaway
Vendor form
Home
Conversations
Documents
Shared with us
Notebook
Pages
Orders
New
Edit in grid view
Share
Export
Automate
Vendors
Vendor Name
Vendor E-Mail
Vendor ID
Mahindra
Mh@gmail.com
VEN000001
Bajaj
bajaj@gmail.com
VEN000003
Maruti Suzuki
Ms@gmail.com
VEN000004
Vendor Name
Benz
Vendor E-Mail
benz@gmail.com
Submit



Send mail to Sales users using Flow (Power Automate)

1. Send mail to Sales Manager, Vendor EMail for each Sales order (Invoice Format)
2. Approval for Sales order value more than 1,00,000, update the status in orders list as Approved, Point 1 send invoice and update status as completed
3. Generate summary report of monthly sales in excel format

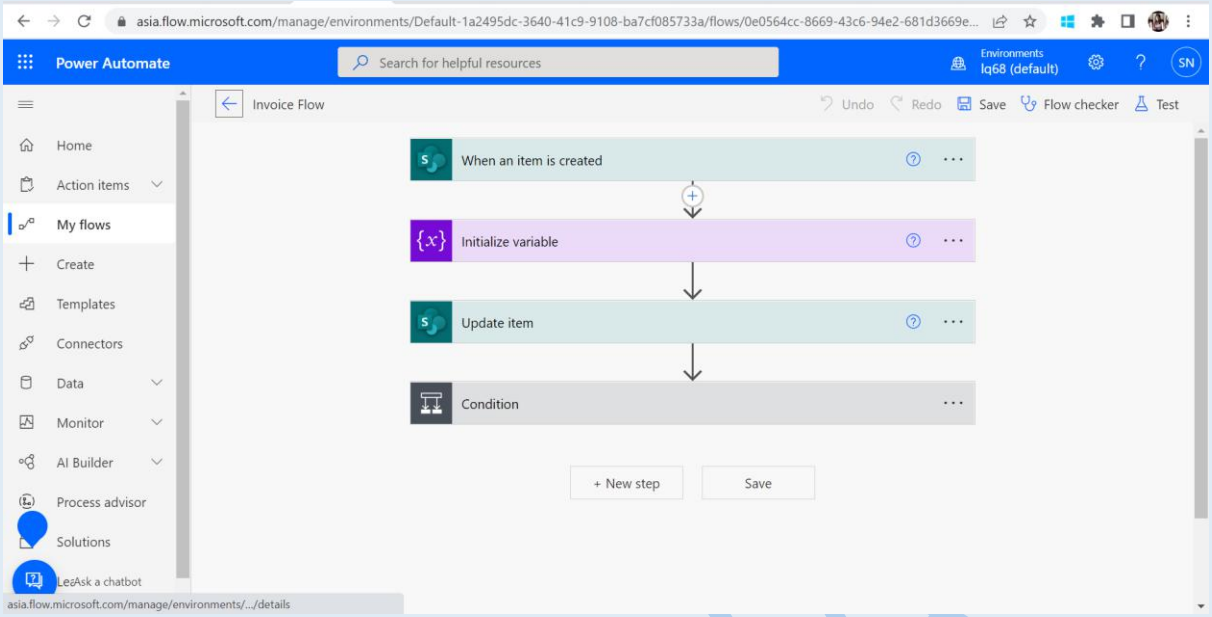
->Invoice Flow

Go to India.flow.microsoft.com and click create flow and select when an item is created template

● When the order amount is below 1, 00,000 it automatically places the order and the status changes to completed. The vendor receives the email that their order is placed with the invoice attached along.

Next we are entering an order where the amount is more than 1, 00,000. In that case, the sales user will receive an email whether to approve or reject the order. Depending on the status changes and if approved, the vendor receives the email with an invoice and if rejected, the vendor

GETAWA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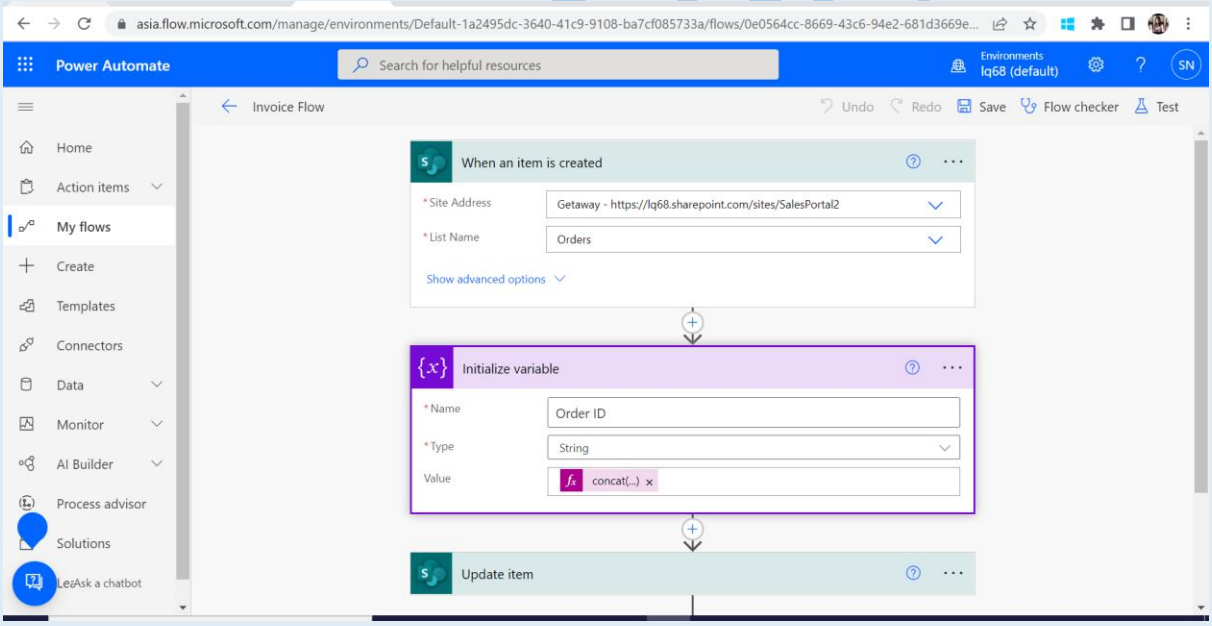
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
When an item is created
Initialize variable
Update item
Condition
+ New step
Save
asia.flow.microsoft.com/manage/environments/.../details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Power Automate
Search for helpful resources
Environments
lq68 (default)
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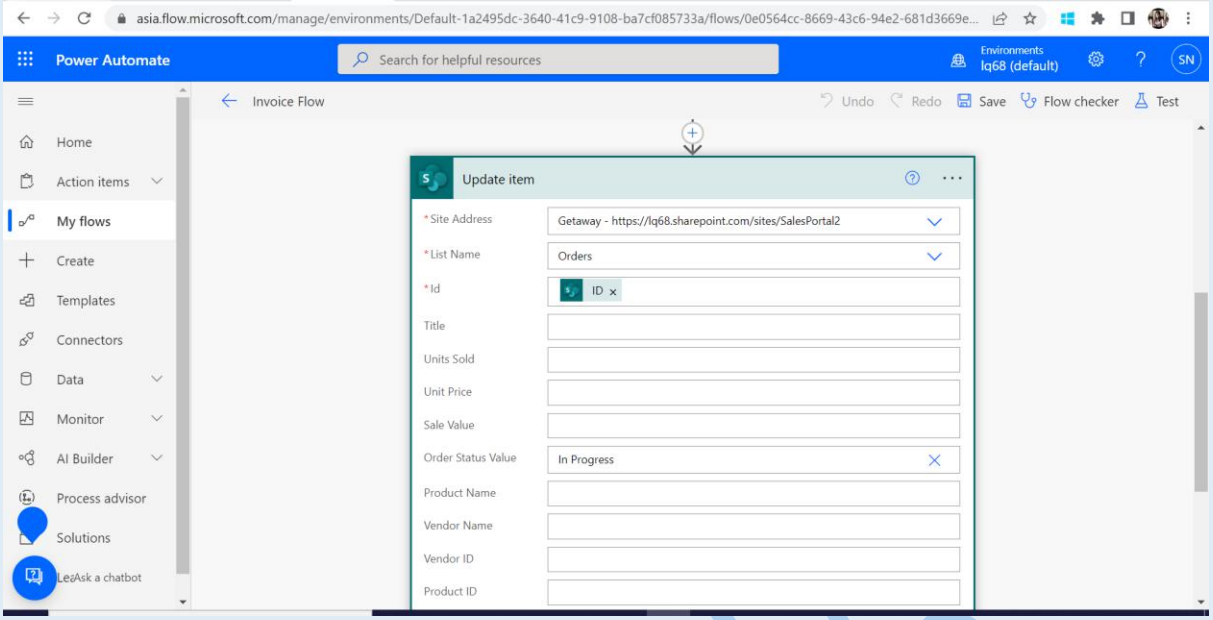
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
When an item is created
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* List Name
Orders
Show advanced options
Initialize variable
* Name
Order ID
* Type
String
Value
concat(...)
Update item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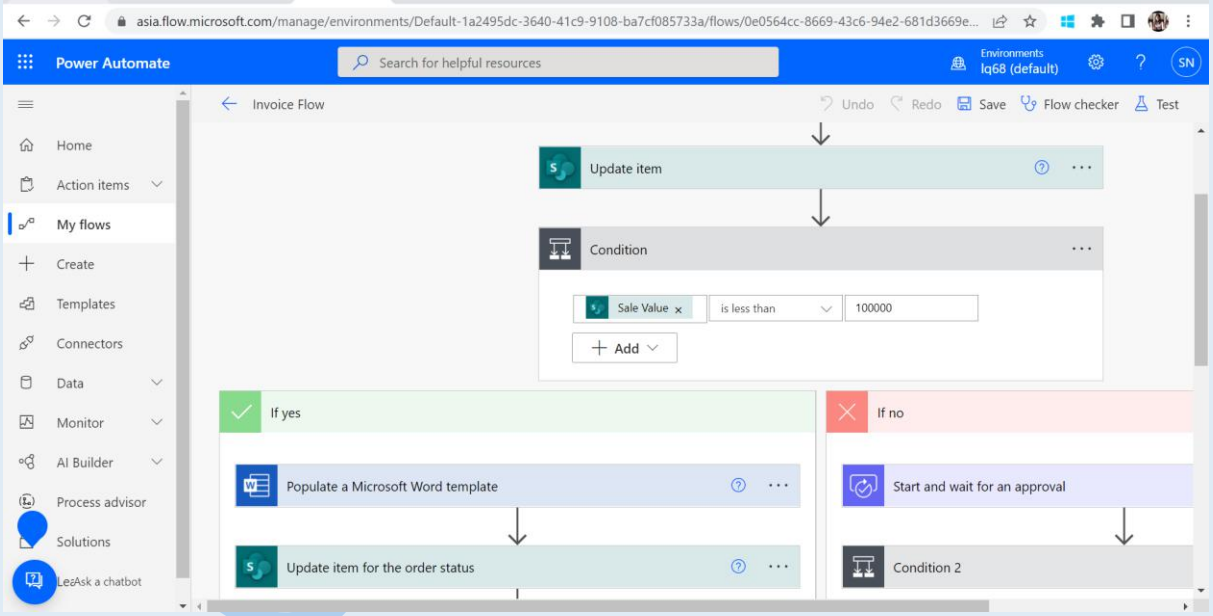
Power Automate
Search for helpful resources
Environments
Iq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Update item
* Site Address
Getaway - https://Iq68.sharepoint.com/sites/SalesPortal2
* List Name
Orders
* Id
ID
Title
Units Sold
Unit Price
Sale Value
Order Status Value
In Progress
Product Name
Vendor Name
Vendor ID
Product ID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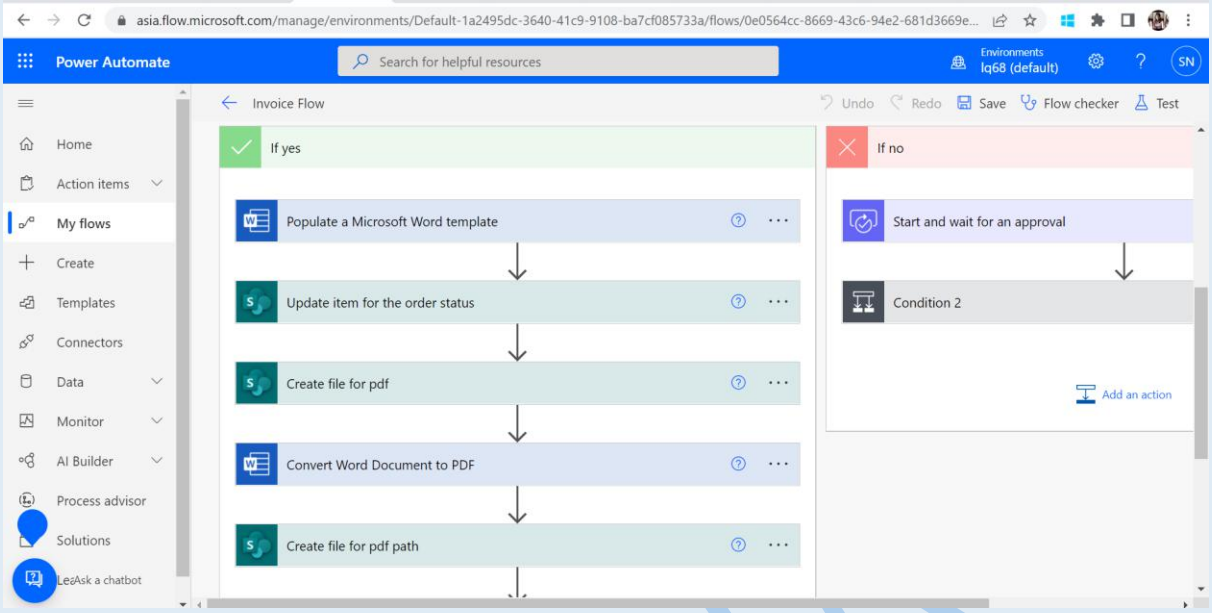
Power Automate
Search for helpful resources
Environments
Iq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Update item
Condition
Sale Value
is less than
100000
Add
If yes
If no
Populate a Microsoft Word template
Start and wait for an approval
Update item for the order status
Condition 2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Power Automate
Search for helpful resources
Environments
lq68 (default)
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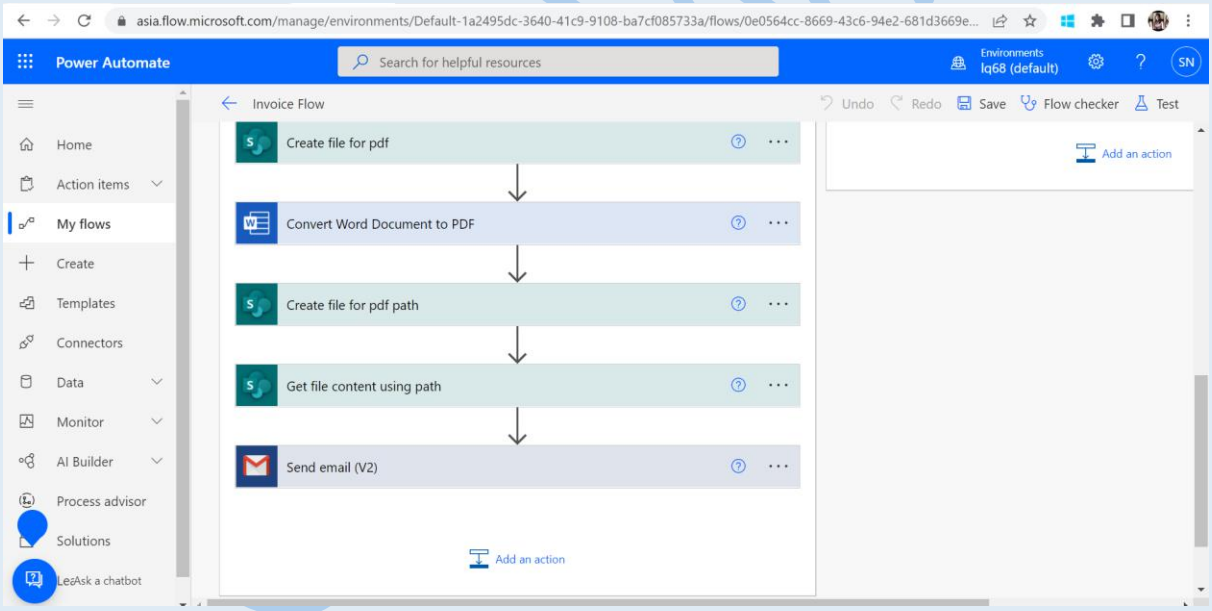
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
If yes
Populate a Microsoft Word template
Update item for the order status
Create file for pdf
Convert Word Document to PDF
Create file for pdf path
If no
Start and wait for an approval
Condition 2
Add an action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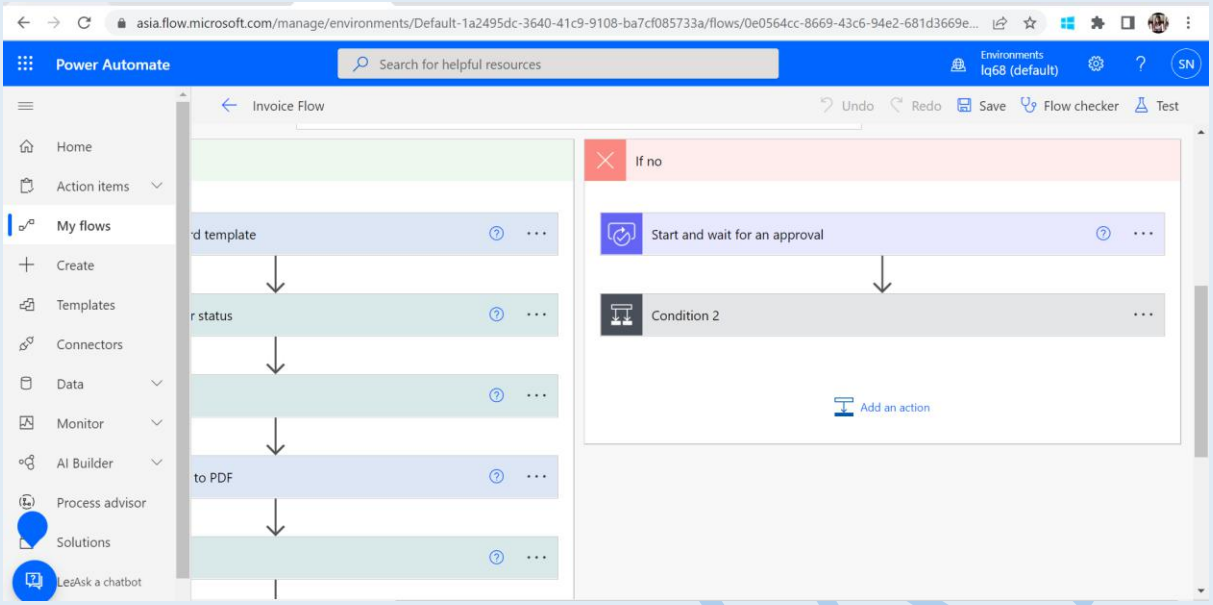
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Create file for pdf
Convert Word Document to PDF
Create file for pdf path
Get file content using path
Send email (V2)
Add an action
Add an action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Power Automate
Search for helpful resources
Environments
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Invoice Flow
Undo
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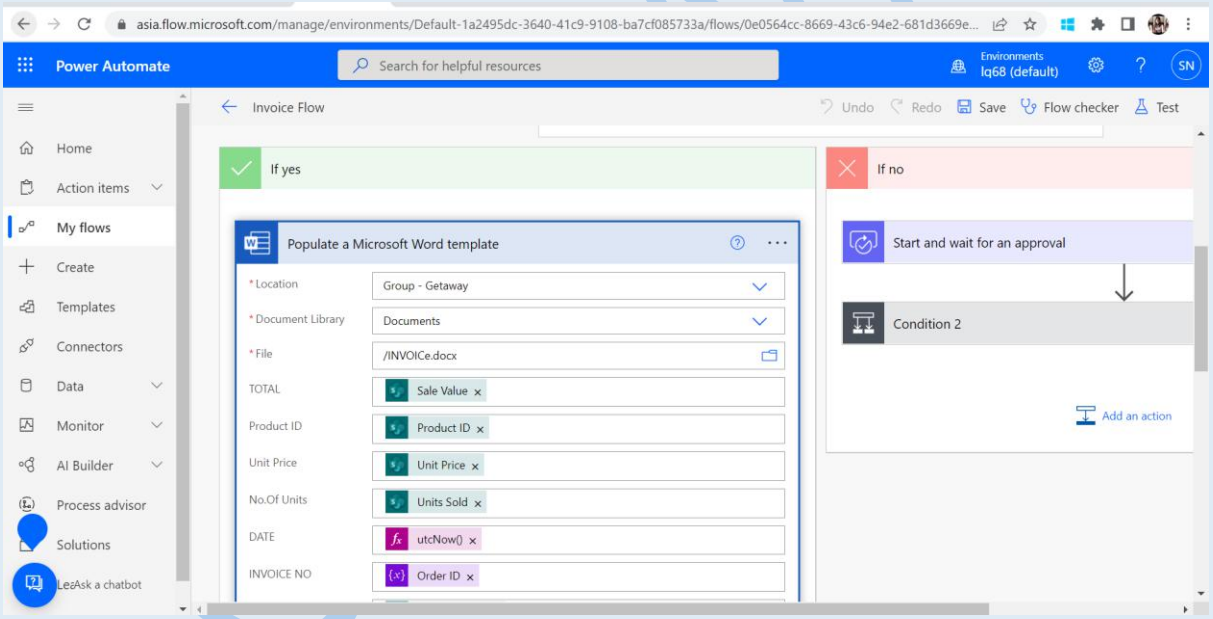
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
d template
r status
to PDF
If no
Start and wait for an approval
Condition 2
Add an action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Power Automate
Search for helpful resources
Environments
lq68 (default)
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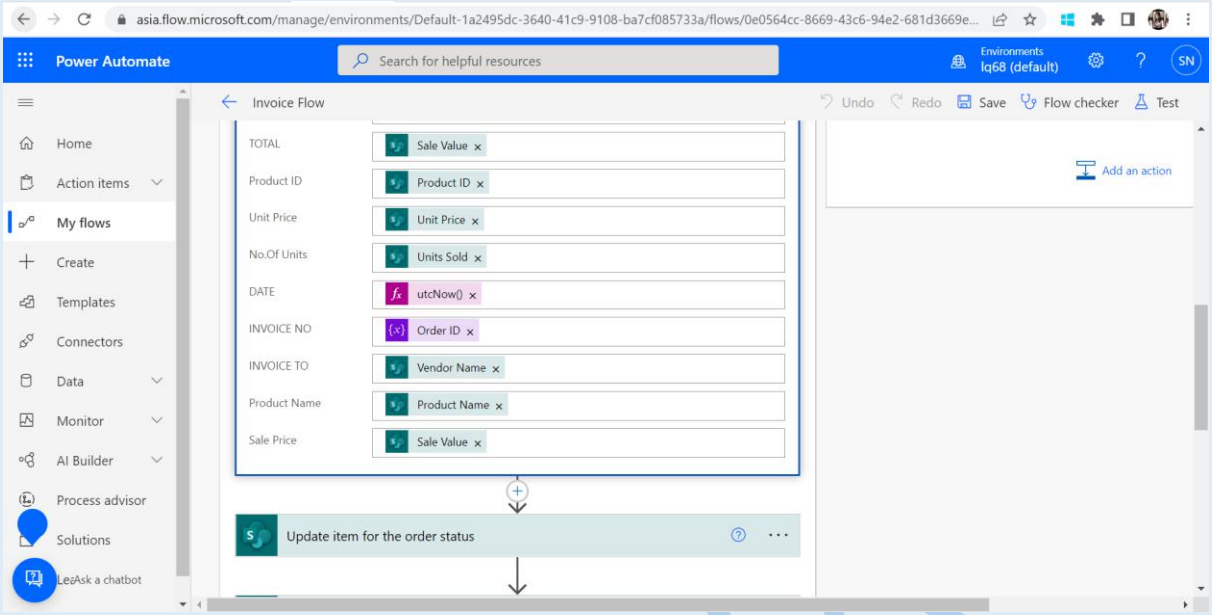
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
If yes
Populate a Microsoft Word template
* Location
Group - Getaway
* Document Library
Documents
* File
/INVOICe.docx
TOTAL
Sale Value
Product ID
Product ID
Unit Price
Unit Price
No.Of Units
Units Sold
DATE
utcNow()
INVOICE NO
Order ID
If no
Start and wait for an approval
Condition 2
Add an action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Power Automate
Search for helpful resources
Environments
lq68 (default)
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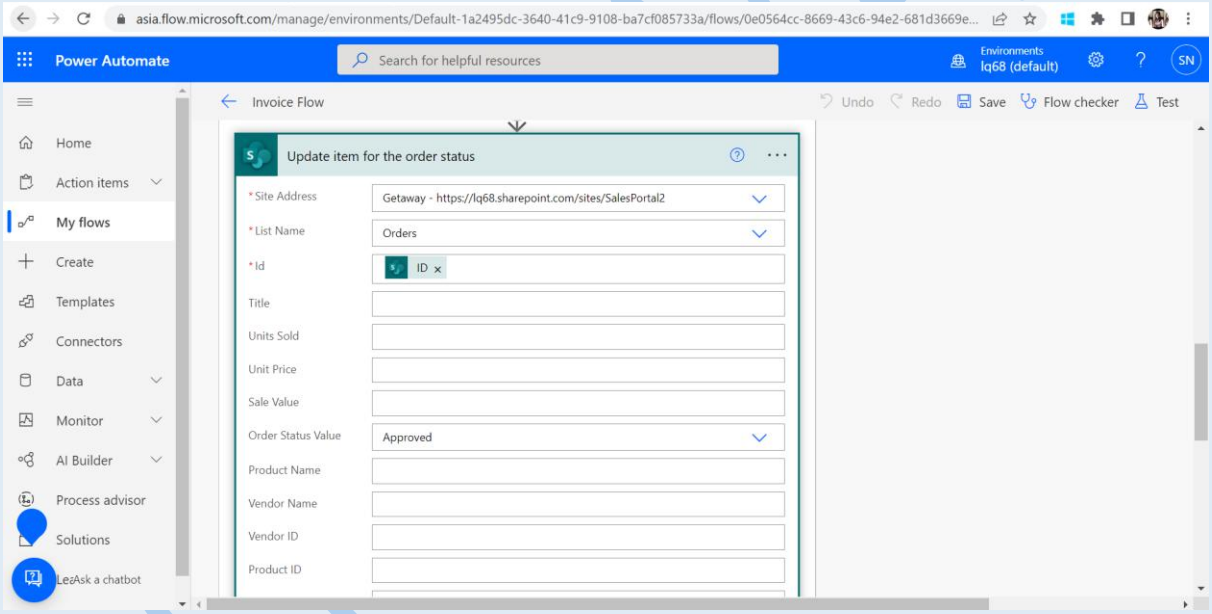
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Undo
Redo
Save
Flow checker
Test
TOTAL
Sale Value
Product ID
Product ID
Unit Price
Unit Price
No.Of Units
Units Sold
DATE
utcNow()
INVOICE NO
Order ID
INVOICE TO
Vendor Name
Product Name
Product Name
Sale Price
Sale Value
Add an action
Update item for the order status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Power Automate
Search for helpful resources
Environments
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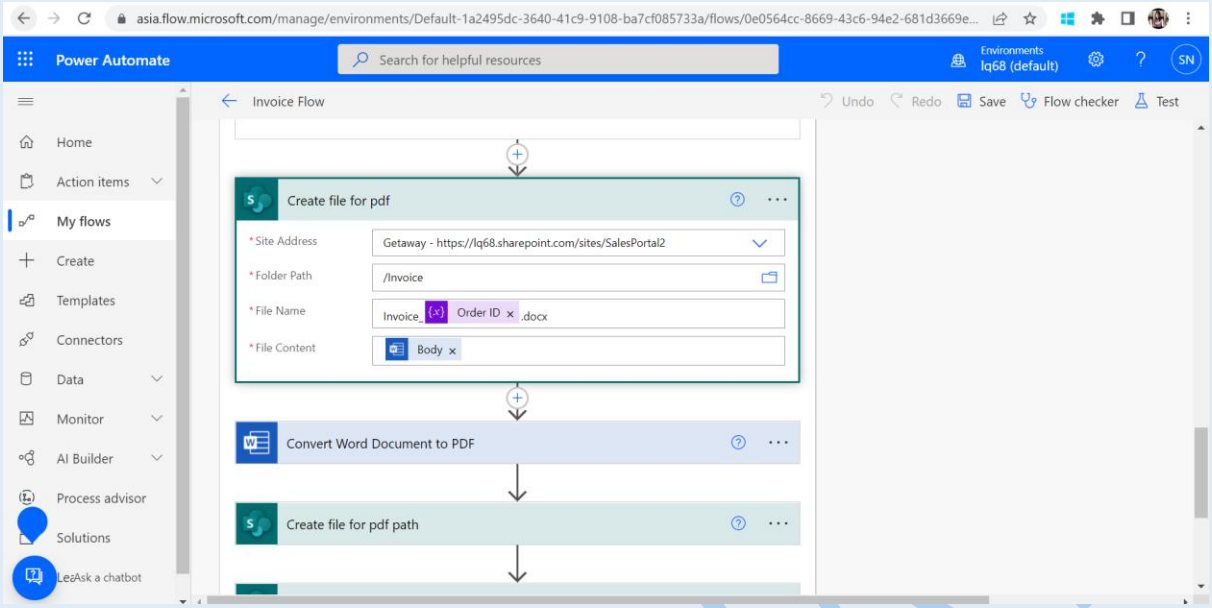
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Update item for the order status
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* List Name
Orders
* Id
ID
Title
Units Sold
Unit Price
Sale Value
Order Status Value
Approved
Product Name
Vendor Name
Vendor ID
Product ID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Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
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Templates
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AI Builder
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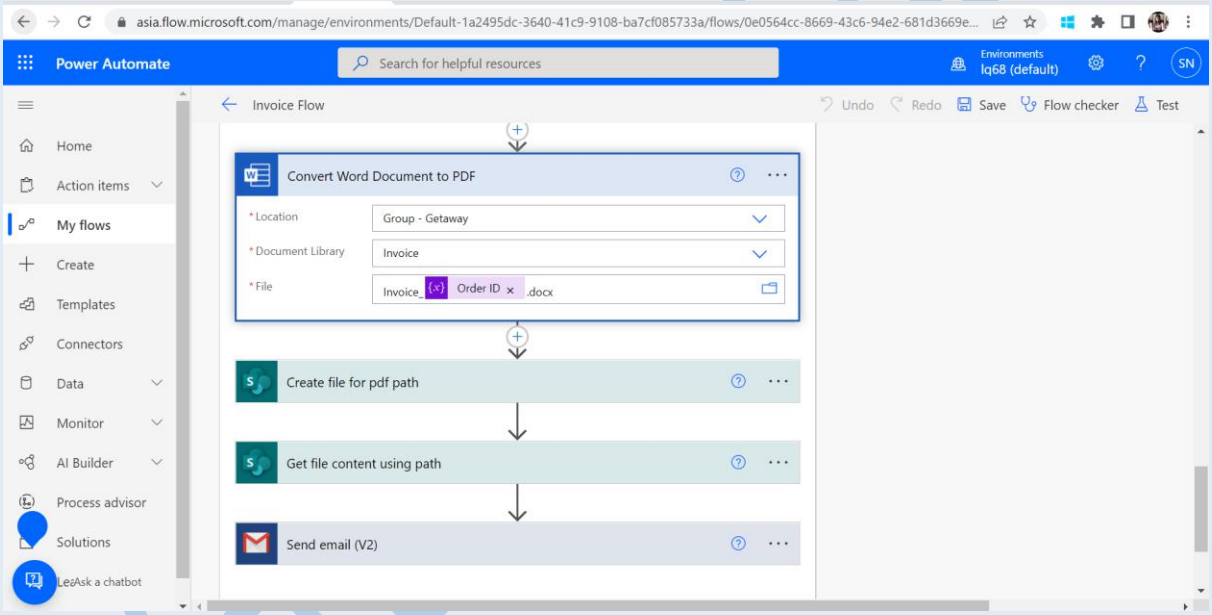
Ask a chatbot
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Create file for pdf
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* Folder Path
/Invoice
* File Name
Invoice_ Order ID .docx
* File Content
Body
Convert Word Document to PDF
Create file for pdf path


asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
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My flows
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Templates
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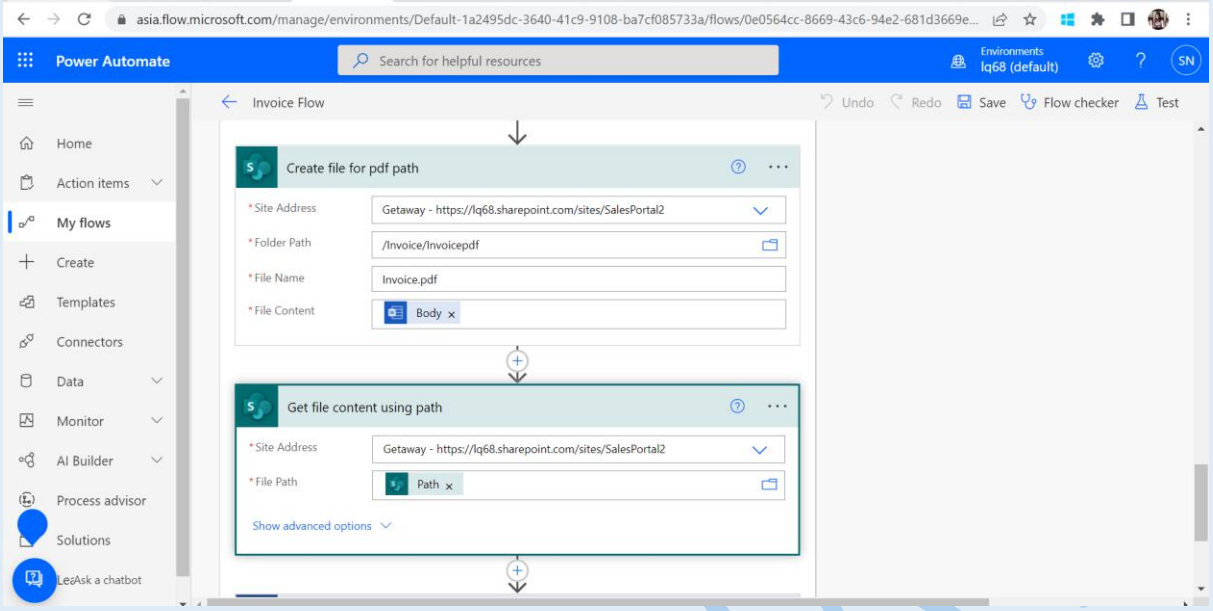
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Convert Word Document to PDF
* Location
Group - Getaway
* Document Library
Invoice
* File
Invoice_ Order ID .docx
Create file for pdf path
Get file content using path
Send email (V2)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Power Automate
Search for helpful resources
Environments
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Home
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Create
Templates
Connectors
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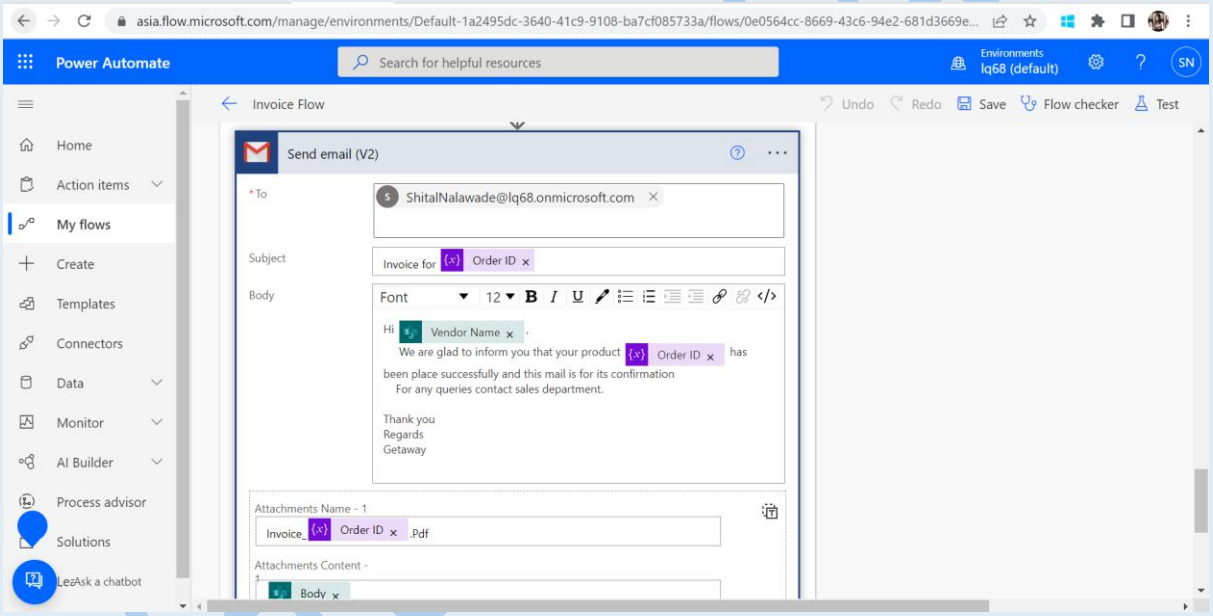
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Create file for pdf path
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* Folder Path
/Invoice/Invoicepdf
* File Name
Invoice.pdf
* File Content
Body
Get file content using path
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* File Path
Path
Show advanced options


asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
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Home
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My flows
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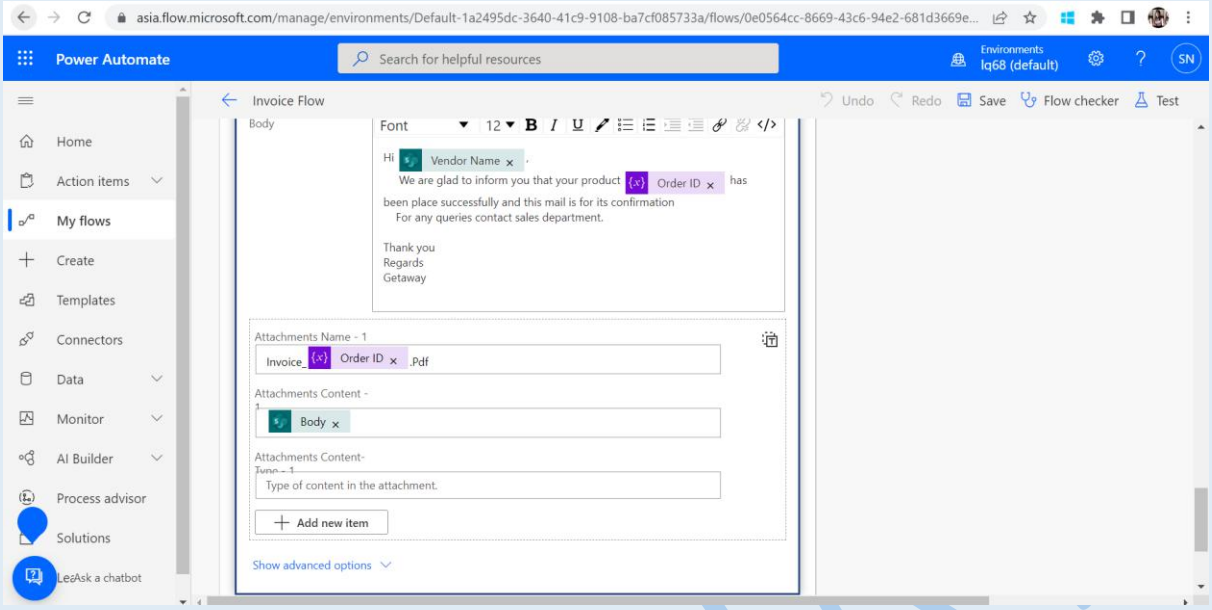
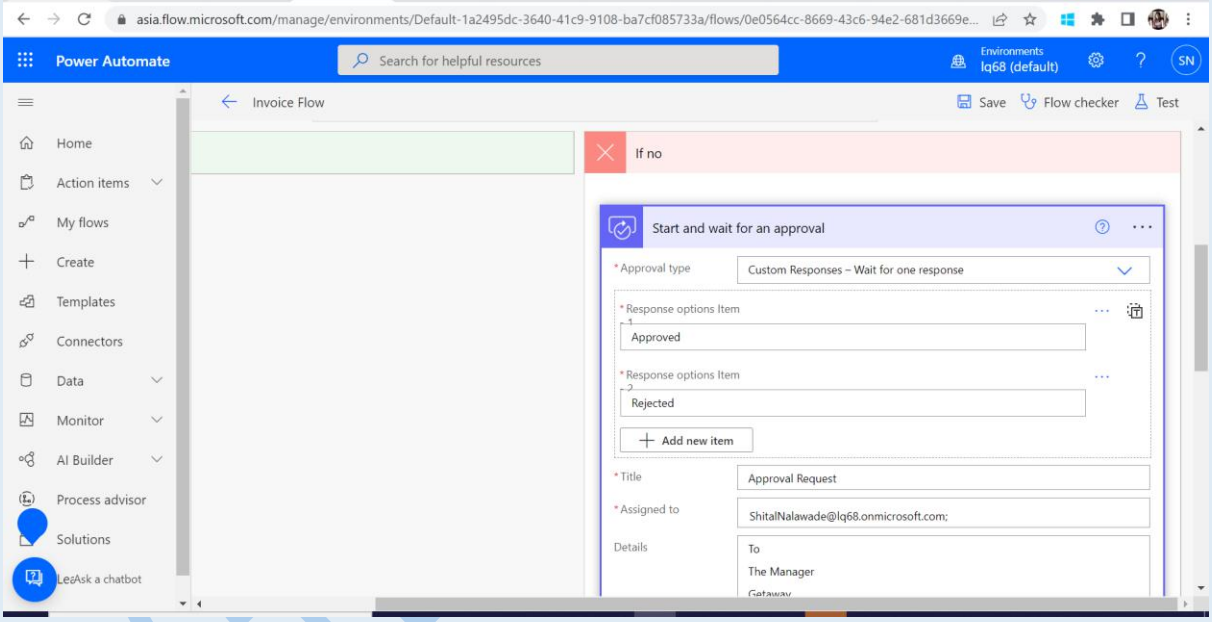
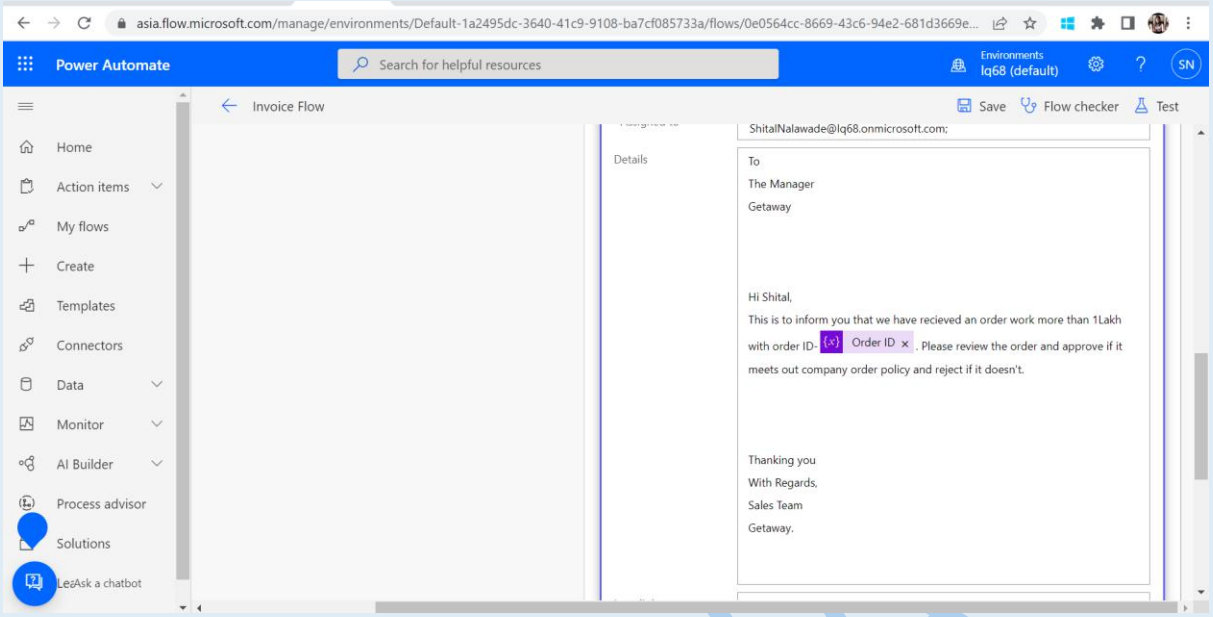
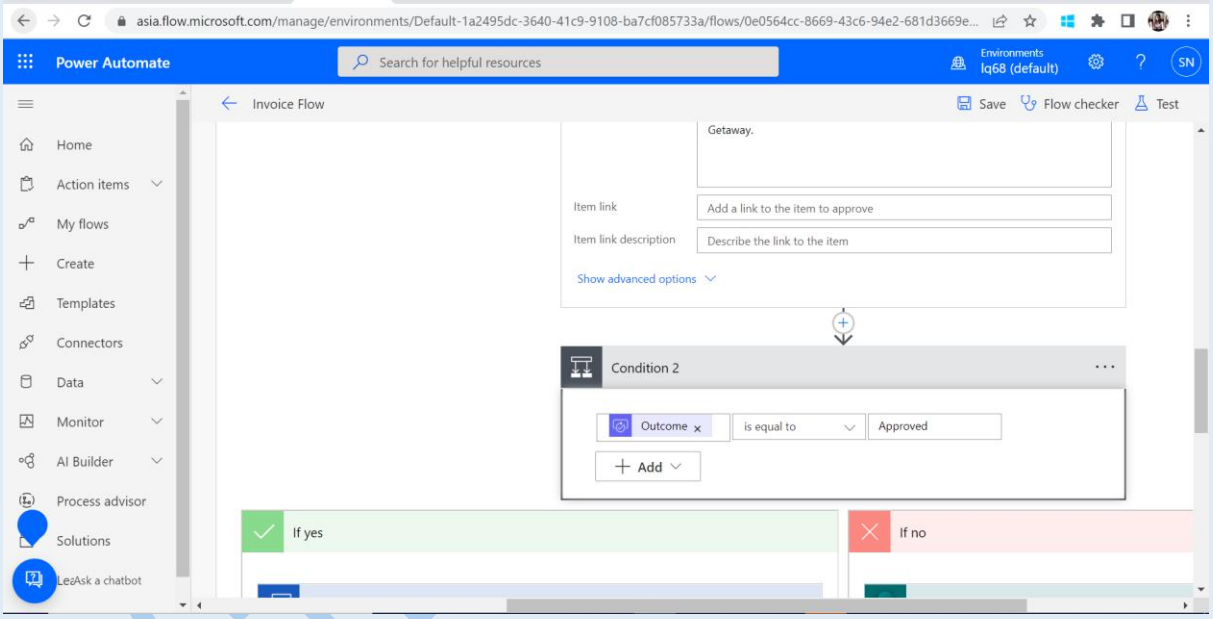
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Send email (V2)
* To
ShitalNalawade@lq68.onmicrosoft.com
Subject
Invoice for
Order ID
Body
Font
12
Hi
Vendor Name
We are glad to inform you that your product
Order ID
has
been place successfully and this mail is for its confirmation
For any queries contact sales department.
Thank you
Regards
Getaway
Attachments Name - 1
Invoice_
Order ID
.Pdf
Attachments Content - 1
Body


asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
Invoice Flow
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Body
Font
12
Hi
Vendor Name
We are glad to inform you that your product
Order ID
has
been place successfully and this mail is for its confirmation
For any queries contact sales department.
Thank you
Regards
Getaway
Attachments Name - 1
Invoice_
Order ID
.Pdf
Attachments Content - 1
Body
Attachments Content-Type - 1
Type of content in the attachment.
Add new item
Show advanced options


asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
Invoice Flow
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
If no
Start and wait for an approval
* Approval type
Custom Responses – Wait for one response
* Response options Item 1
Approved
* Response options Item 2
Rejected
Add new item
* Title
Approval Request
* Assigned to
ShitalNalawade@lq68.onmicrosoft.com;
Details
To
The Manager
Getaway


asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Invoice Flow
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
ShitalNalawade@lq68.onmicrosoft.com;
Details
To
The Manager
Getaway
Hi Shital,
This is to inform you that we have recieved an order work more than 1Lakh
with order ID- Order ID . Please review the order and approve if it
meets out company order policy and reject if it doesn't.
Thanking you
With Regards,
Sales Team
Getaway.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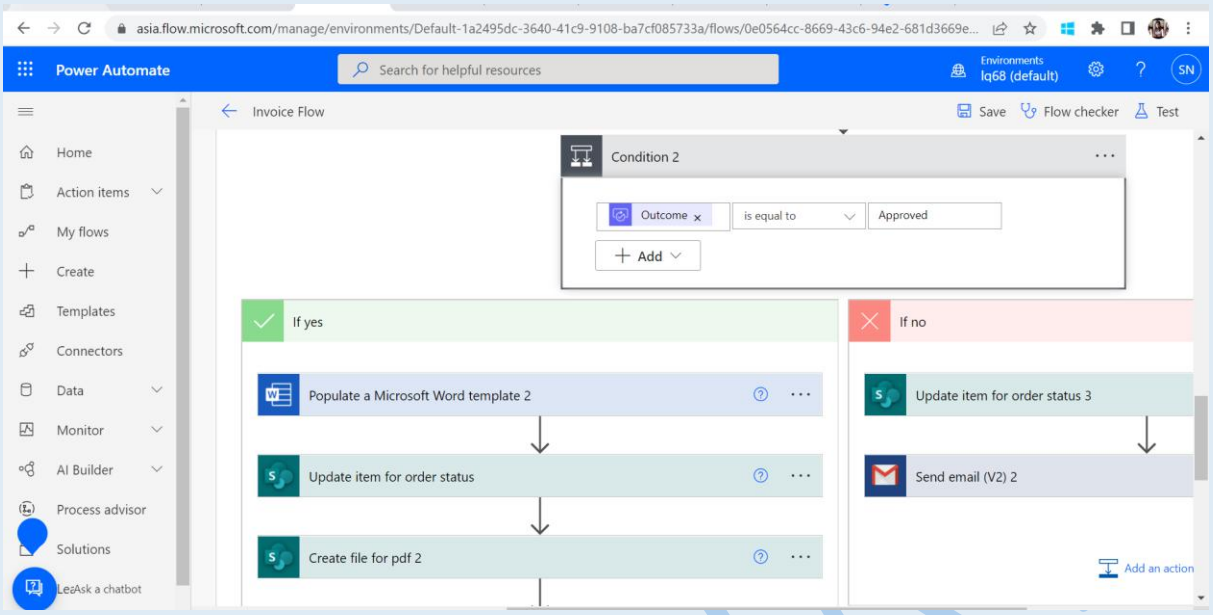
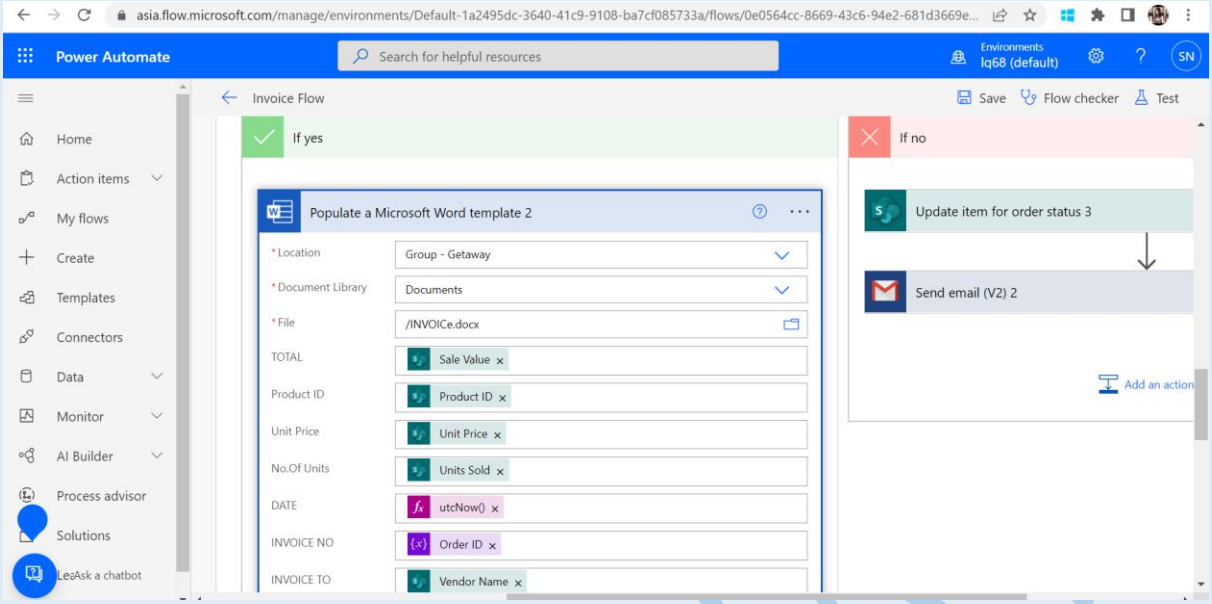
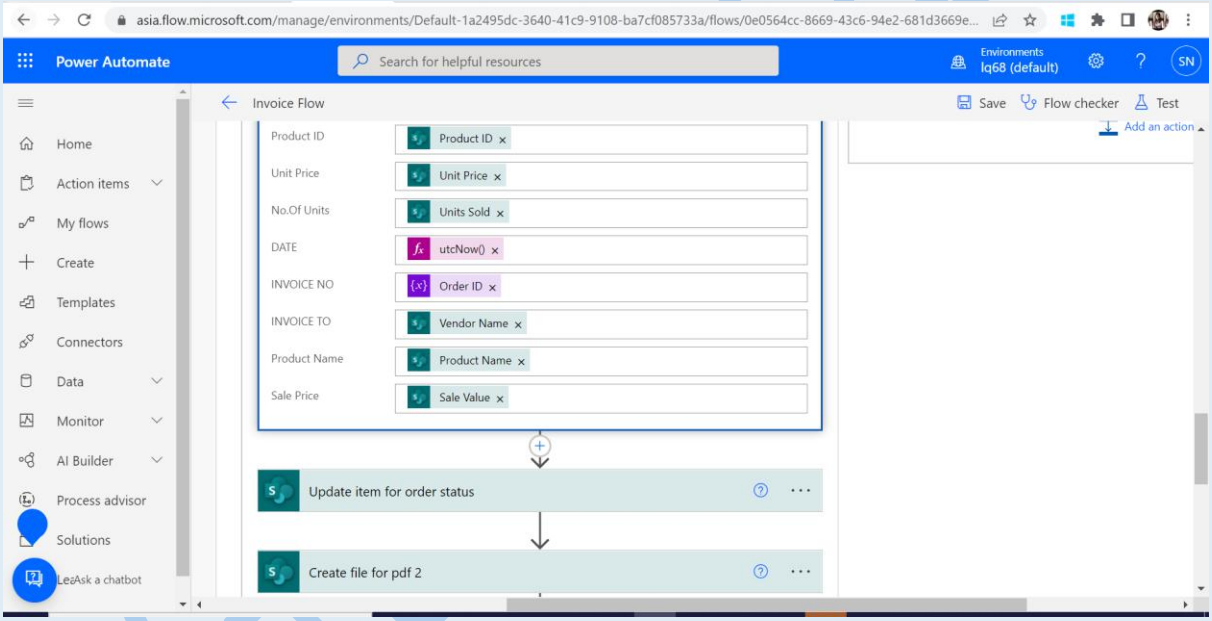
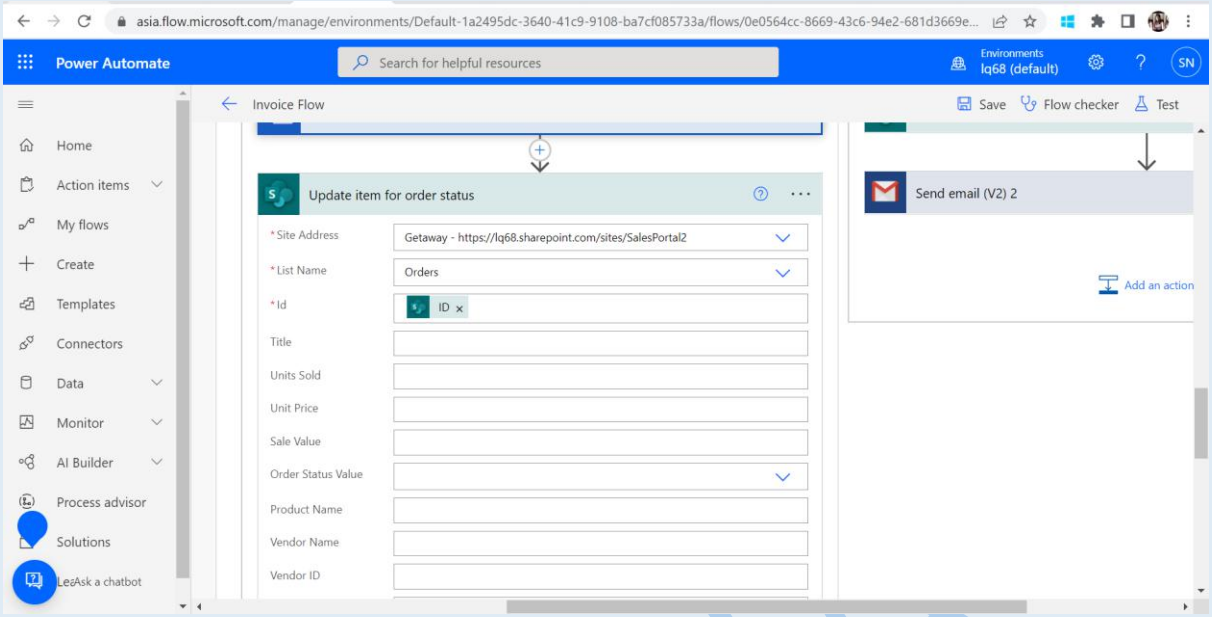
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Invoice Flow
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Getaway.
Item link
Add a link to the item to approve
Item link description
Describe the link to the item
Show advanced options
Condition 2
Outcome
is equal to
Approved
Add
If yes
If no

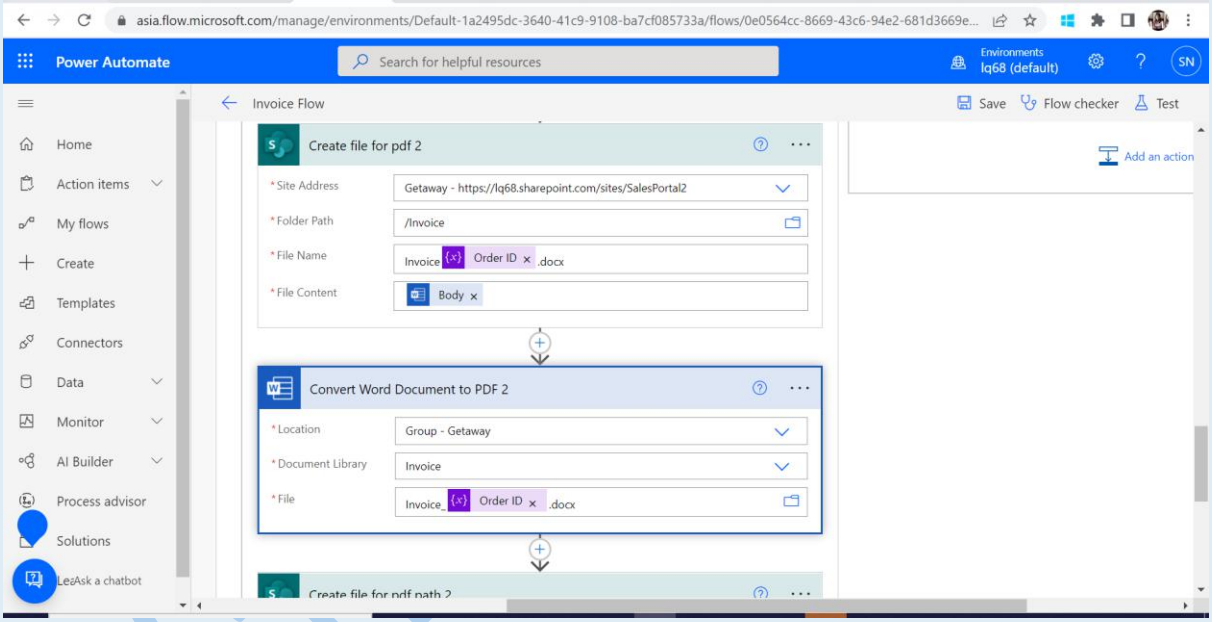

asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
Iq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
LeaAsk a chatbot
Invoice Flow
Save
Flow checker
Test
Condition 2
Outcome
is equal to
Approved
Add
If yes
If no
Populate a Microsoft Word template 2
Update item for order status
Create file for pdf 2
Update item for order status 3
Send email (V2) 2
Add an action

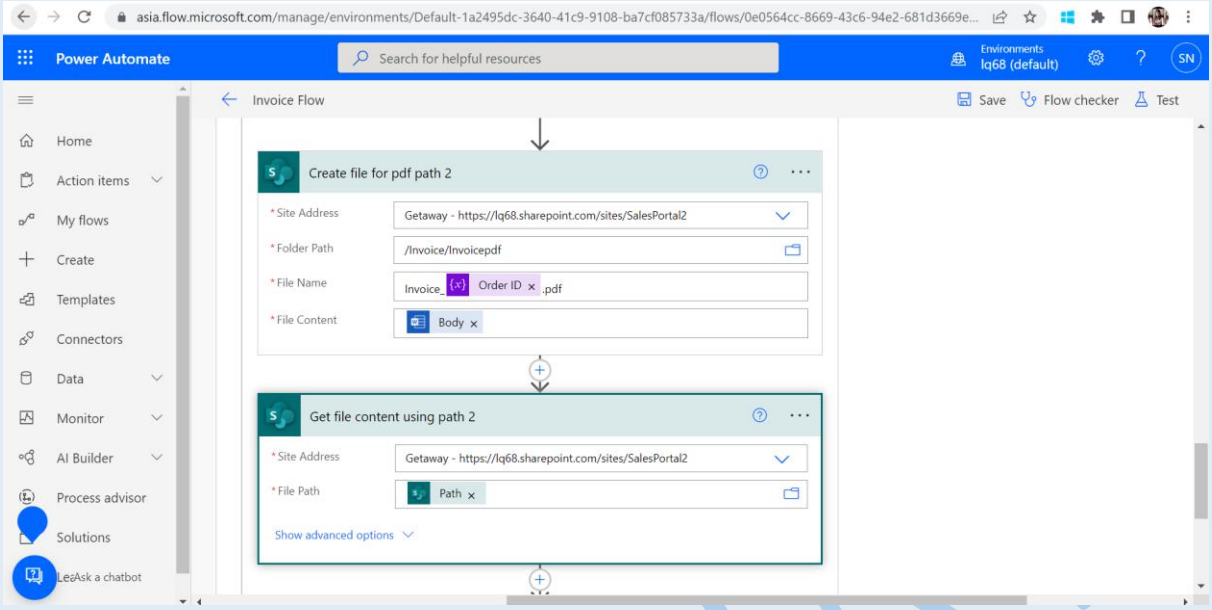
asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
Iq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
LeaAsk a chatbot
Invoice Flow
Save
Flow checker
Test
Create file for pdf 2
Convert Word Document to PDF 2
Create file for pdf path 2
Get file content using path 2
Send email (V2) 3
Add an action

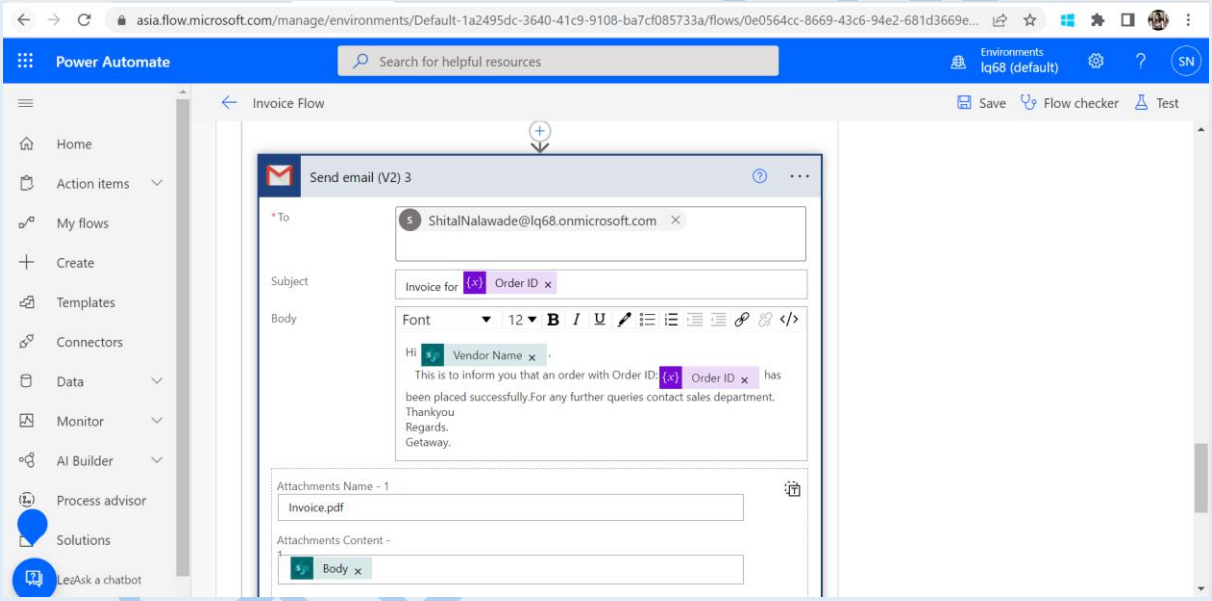

asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Save
Flow checker
Test
If yes
If no
Populate a Microsoft Word template 2
* Location
Group - Getaway
* Document Library
Documents
* File
/INVOICe.docx
TOTAL
Sale Value
Product ID
Product ID
Unit Price
Unit Price
No.Of Units
Units Sold
DATE
utcNow()
INVOICE NO
Order ID
INVOICE TO
Vendor Name
Update item for order status 3
Send email (V2) 2
Add an action

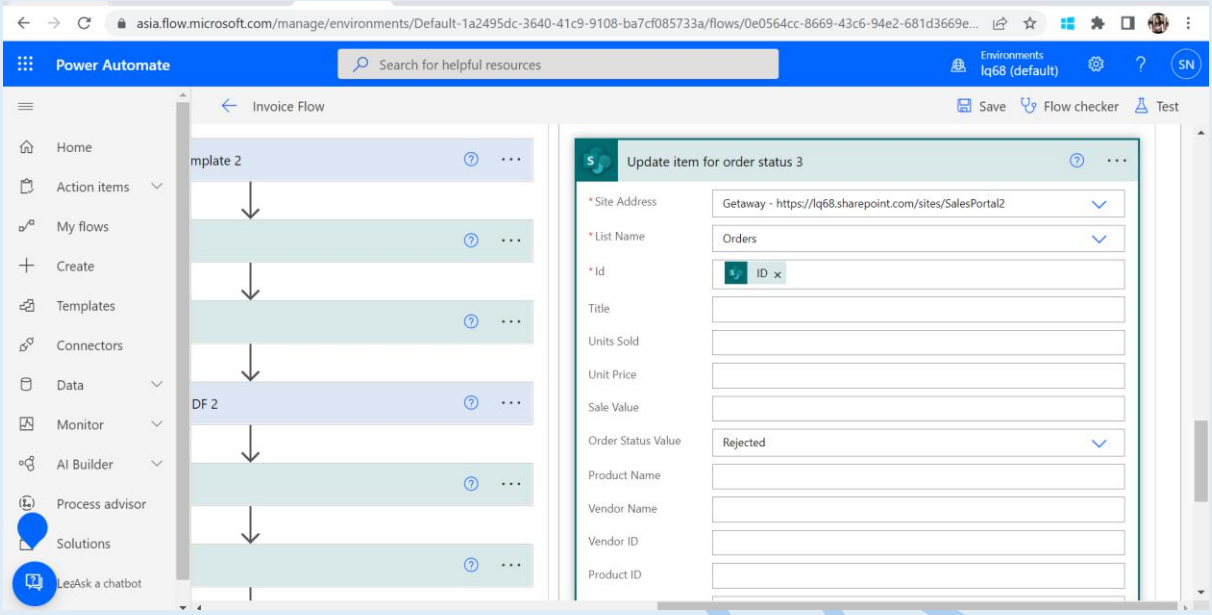

asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Save
Flow checker
Test
Add an action
Product ID
Product ID
Unit Price
Unit Price
No.Of Units
Units Sold
DATE
utcNow()
INVOICE NO
Order ID
INVOICE TO
Vendor Name
Product Name
Product Name
Sale Price
Sale Value
Update item for order status
Create file for pdf 2

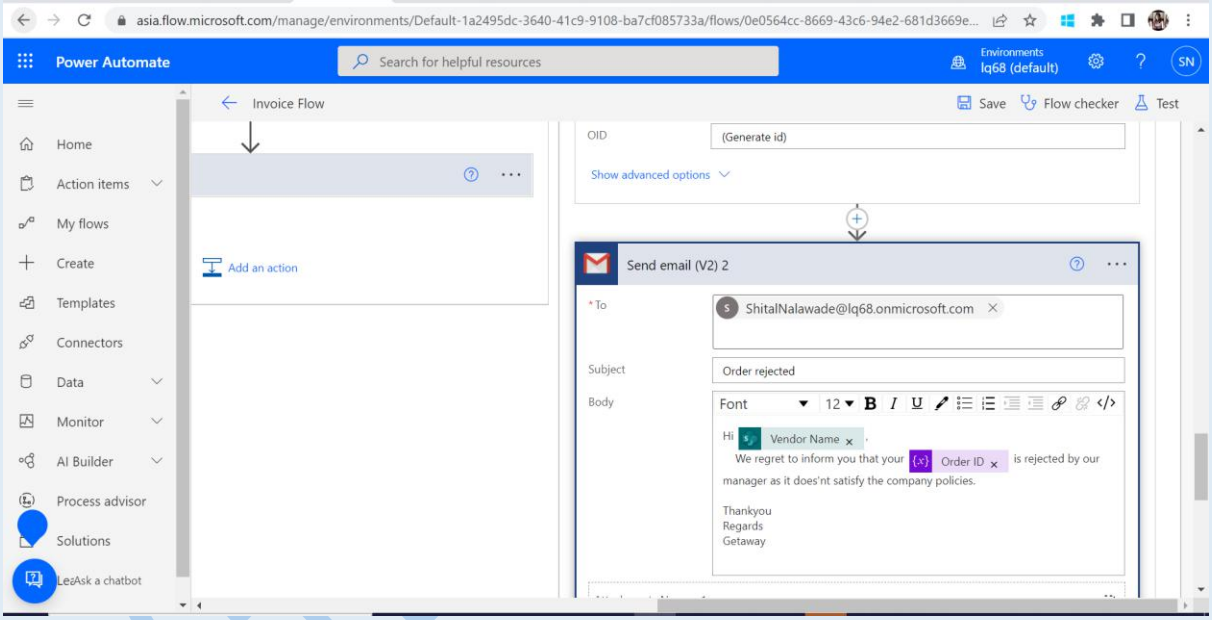

asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Save
Flow checker
Test
Update item for order status
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* List Name
Orders
* Id
ID
Title
Units Sold
Unit Price
Sale Value
Order Status Value
Product Name
Vendor Name
Vendor ID
Send email (V2) 2
Add an action

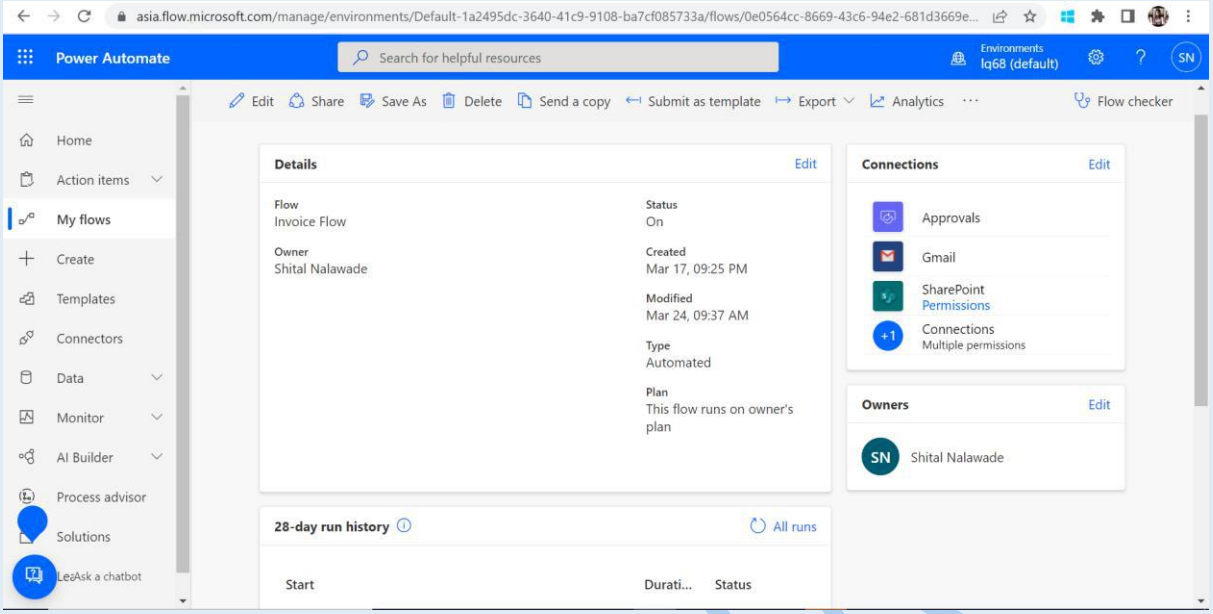

asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Save
Flow checker
Test
Create file for pdf 2
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* Folder Path
/Invoice
* File Name
Invoice Order ID .docx
* File Content
Body
Convert Word Document to PDF 2
* Location
Group - Getaway
* Document Library
Invoice
* File
Invoice_ Order ID .docx
Add an action

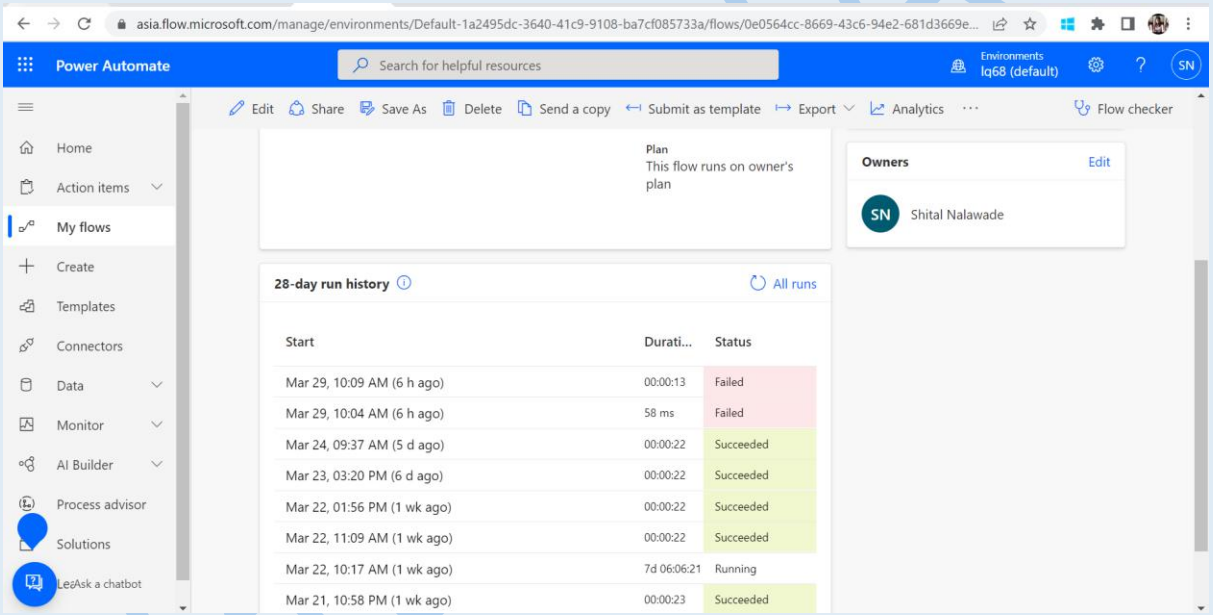

asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Save
Flow checker
Test
Create file for pdf path 2
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* Folder Path
/Invoice/Invoicepdf
* File Name
Invoice_ Order ID .pdf
* File Content
Body
Get file content using path 2
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* File Path
Path
Show advanced options


asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Save
Flow checker
Test
Send email (V2) 3
* To
ShitalNalawade@lq68.onmicrosoft.com
Subject
Invoice for Order ID
Body
Font
12
Hi Vendor Name ,
This is to inform you that an order with Order ID: Order ID has
been placed successfully.For any further queries contact sales department.
Thankyou
Regards.
Getaway.
Attachments Name - 1
Invoice.pdf
Attachments Content - 1
Body

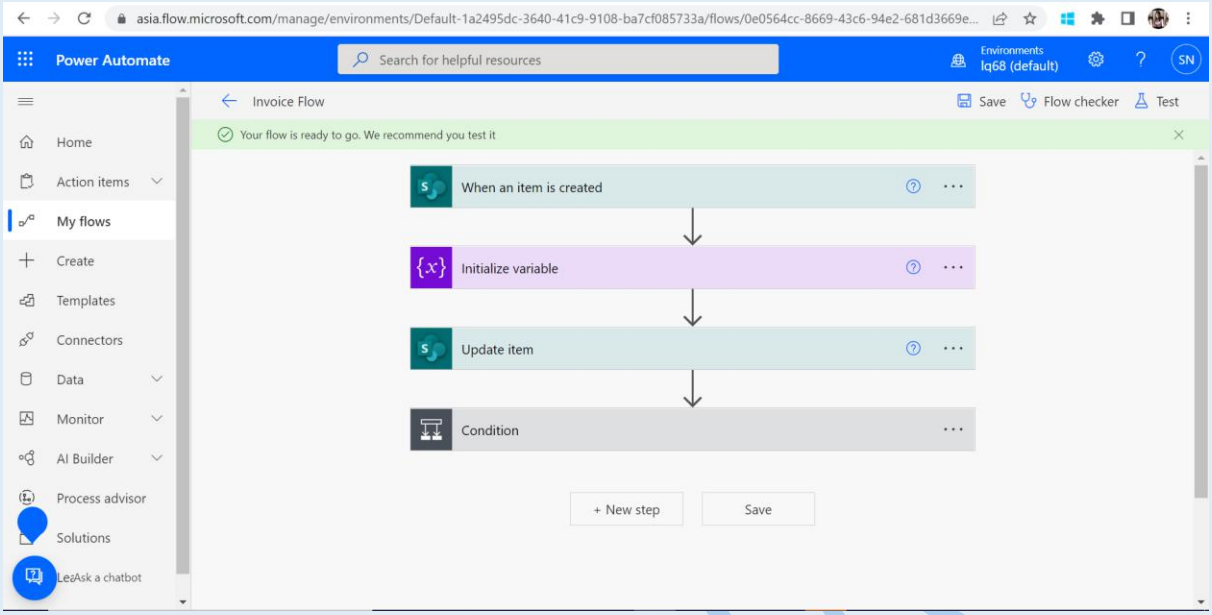

asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Save
Flow checker
Test
mplate 2
DF 2
Update item for order status 3
*Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
*List Name
Orders
*Id
ID
Title
Units Sold
Unit Price
Sale Value
Order Status Value
Rejected
Product Name
Vendor Name
Vendor ID
Product ID

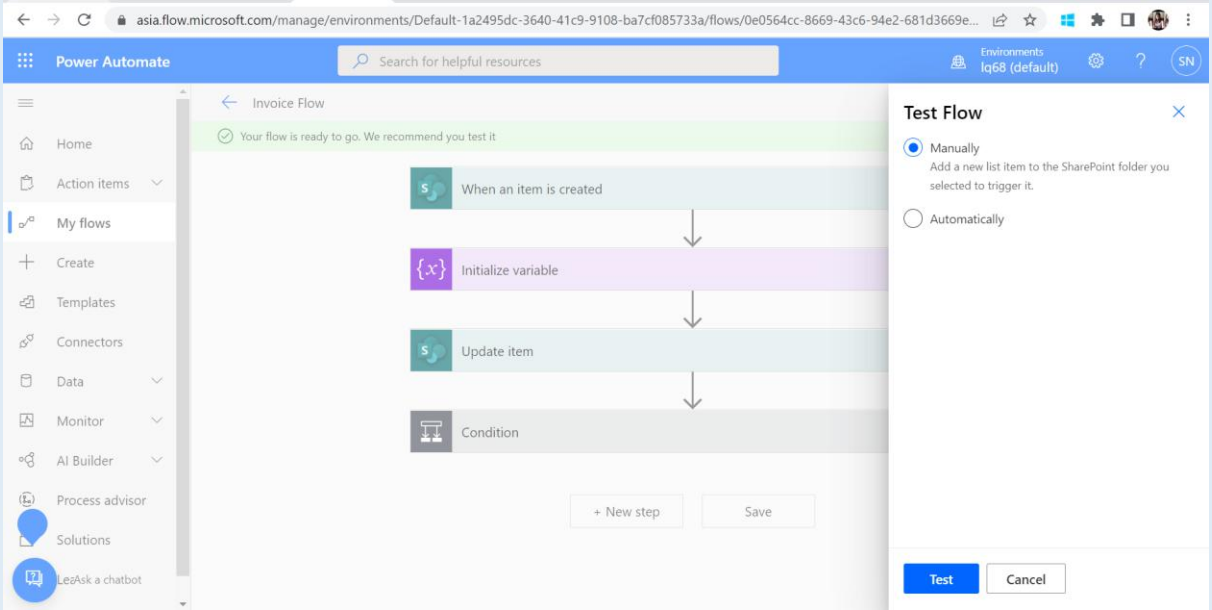

asia.flow.microsoft.com/manage/environments/Default-1a2495dc-3640-41c9-9108-ba7cf085733a/flows/0e0564cc-8669-43c6-94e2-681d3669e...
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Invoice Flow
Save
Flow checker
Test
Add an action
OID
(Generate id)
Show advanced options
Send email (V2) 2
*To
ShitalNalawade@lq68.onmicrosoft.com
Subject
Order rejected
Body
Font
12
Hi
Vendor Name
We regret to inform you that your
Order ID
is rejected by our manager as it does'nt satisfy the company policies.
Thankyou
Regards
Getaway



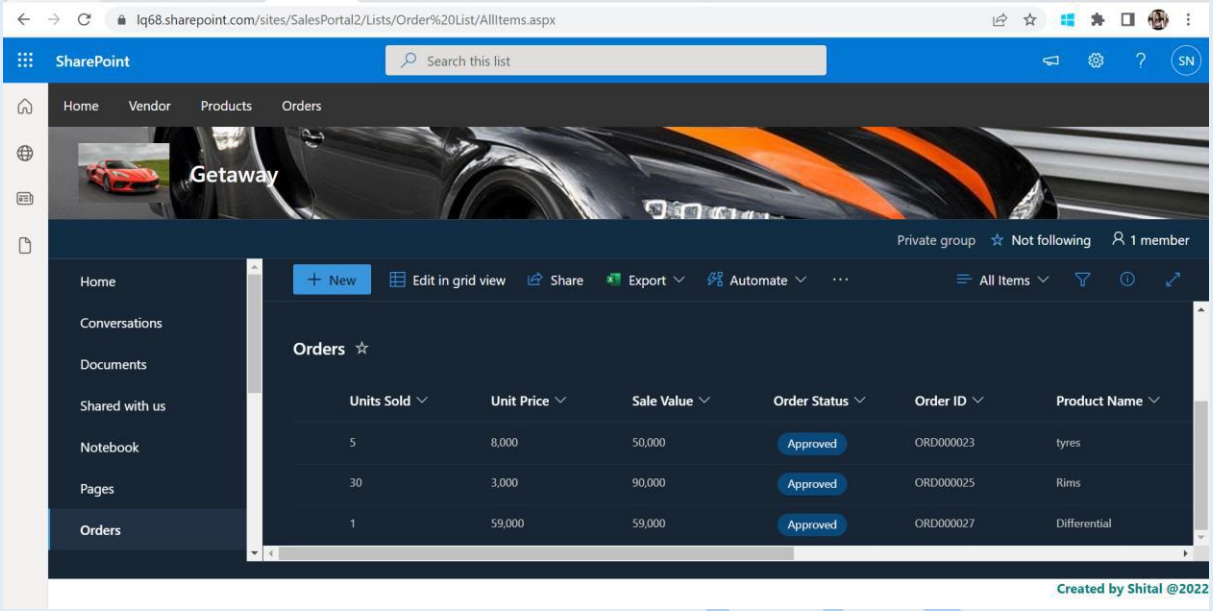


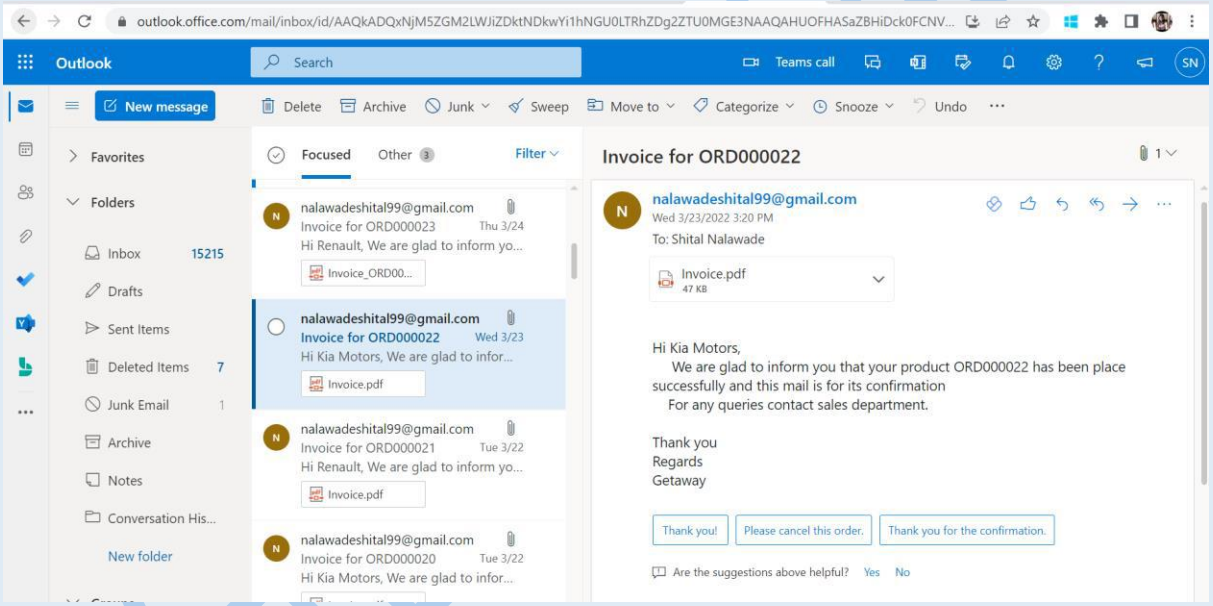
Working of the flow:





Case 1: Added record in order list with value of Sales Value less than 1,00,000.


lq68.sharepoint.com/sites/SalesPortal2/Lists/Order%20List/AllItems.aspx
SharePoint
Search this list
Home
Vendor
Products
Orders
Getaway
Private group
Not following
1 member
Home
Conversations
Documents
Shared with us
Notebook
Pages
Orders
New
Edit in grid view
Share
Export
Automate
All Items
Orders
Units Sold
Unit Price
Sale Value
Order Status
Order ID
Product Name
5
8,000
50,000
Approved
ORD000023
tyres
30
3,000
90,000
Approved
ORD000025
Rims
1
59,000
59,000
Approved
ORD000027
Differential
Created by Shital @2022


Outlook
Search
Teams call
New message
Delete
Archive
Junk
Sweep
Move to
Categorize
Snooze
Undo
Favorites
Folders
Inbox 15215
Drafts
Sent Items
Deleted Items 7
Junk Email 1
Archive
Notes
Conversation His...
New folder
Focused
Other 3
Filter
nalawadeshital99@gmail.com
Invoice for ORD000023
Thu 3/24
Hi Renault, We are glad to inform yo...
Invoice_ORD00...
nalawadeshital99@gmail.com
Invoice for ORD000022
Wed 3/23
Hi Kia Motors, We are glad to infor...
Invoice.pdf
nalawadeshital99@gmail.com
Invoice for ORD000021
Tue 3/22
Hi Renault, We are glad to inform yo...
Invoice.pdf
nalawadeshital99@gmail.com
Invoice for ORD000020
Tue 3/22
Hi Kia Motors, We are glad to infor...
Invoice for ORD000022
nalawadeshital99@gmail.com
Wed 3/23/2022 3:20 PM
To: Shital Nalawade
Invoice.pdf
47 KB
Hi Kia Motors,
We are glad to inform you that your product ORD000022 has been place successfully and this mail is for its confirmation
For any queries contact sales department.
Thank you
Regards
Getaway
Thank you!
Please cancel this order.
Thank you for the confirmation.
Are the suggestions above helpful?
Yes
No

INVOICE

GETAWAY

DATE
3/23/2022 9:50:25 AM

INVOICE NO
ORD000022

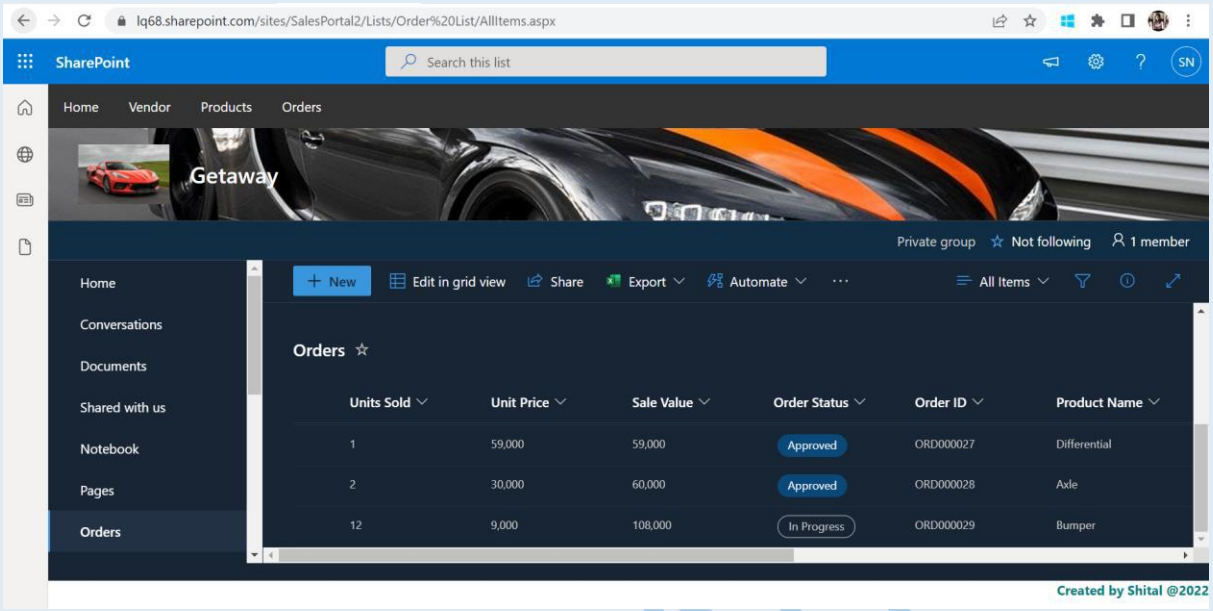
GETAWAY AUTOMOBILES
+919834737685
getaway@gmail.com

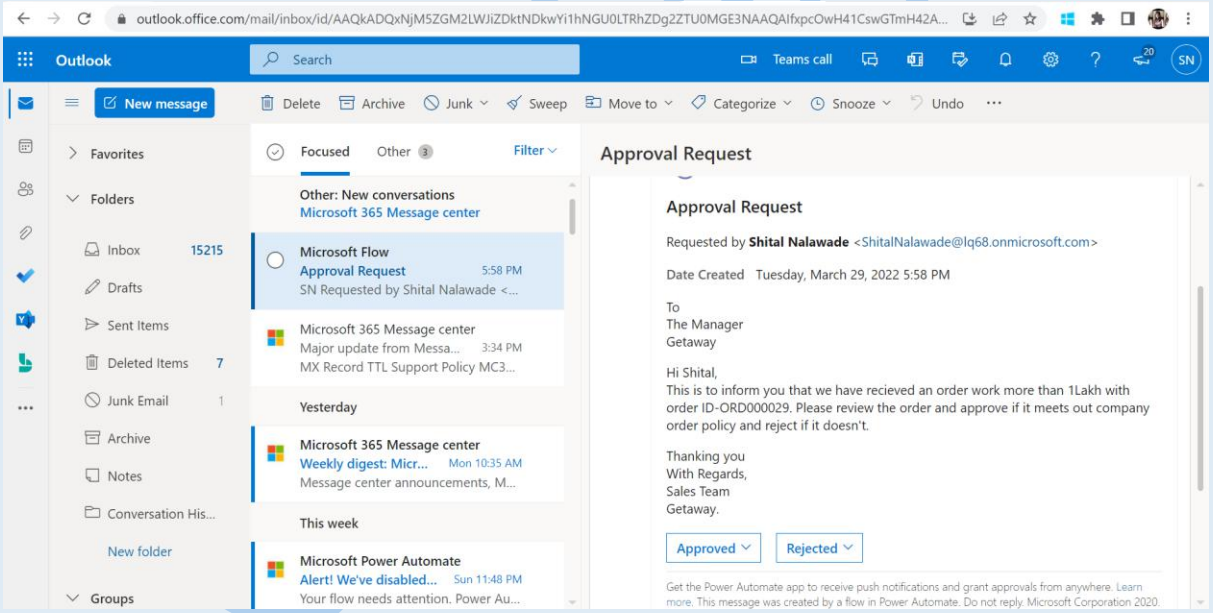
INVOICE TO
Kia Motors

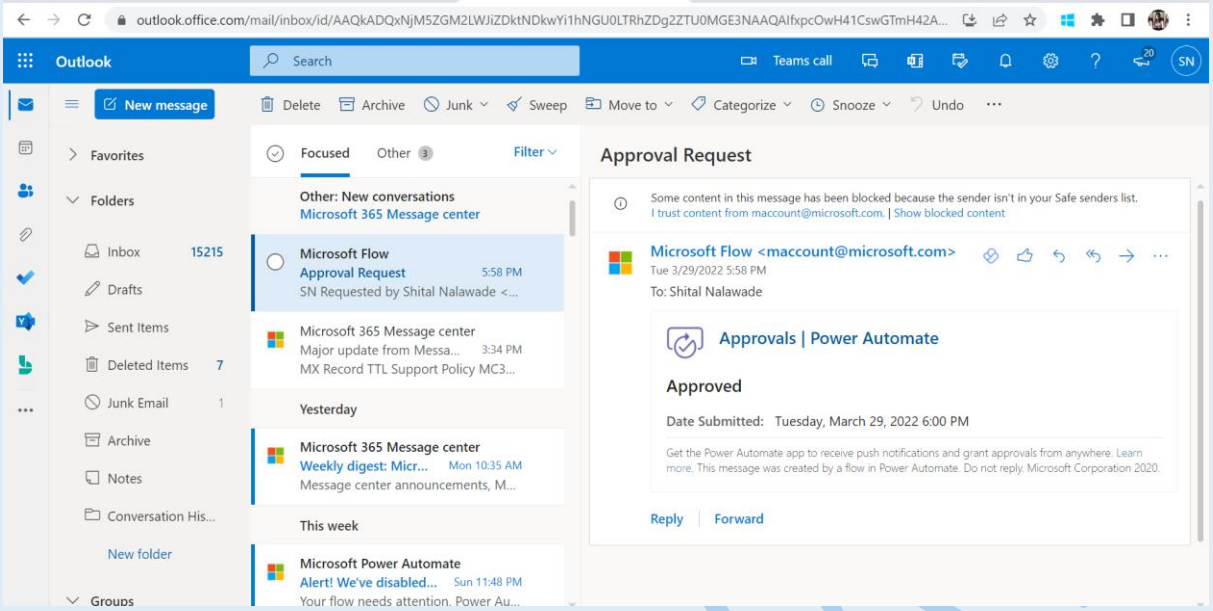
Product Name	Product ID	Unit Price	No. Of Units	Sale Price
Rims	PRD000013	3000	2	6000

TOTAL=6000

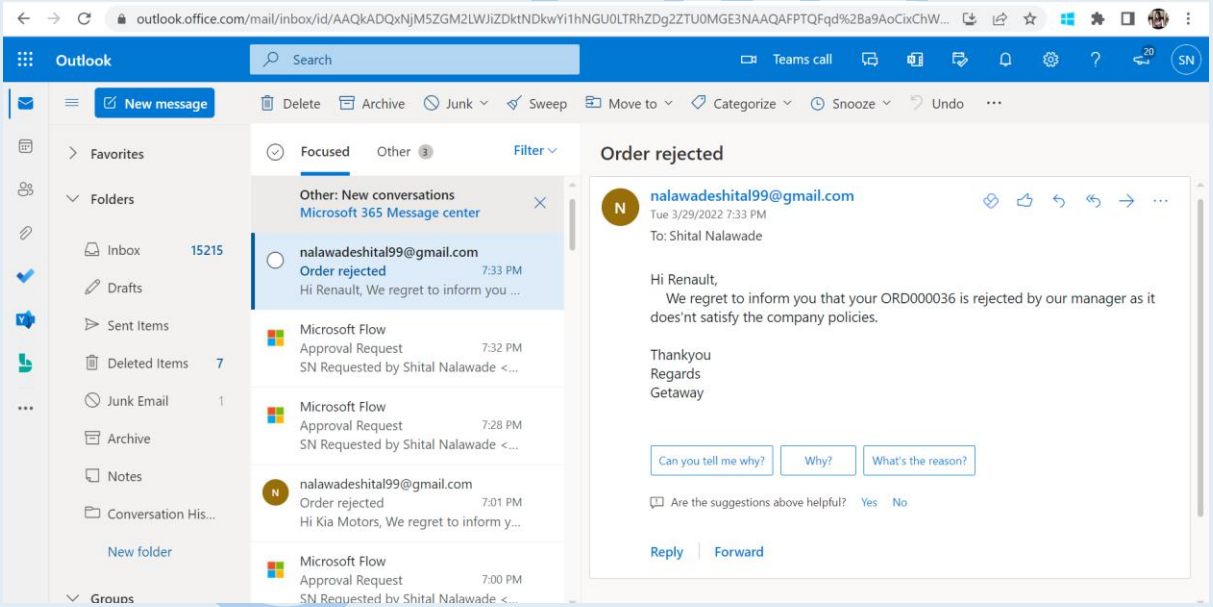
Case 2: Added record in order list with value of Sales Value greater than 1, 00,000 and the Manager will approve the order

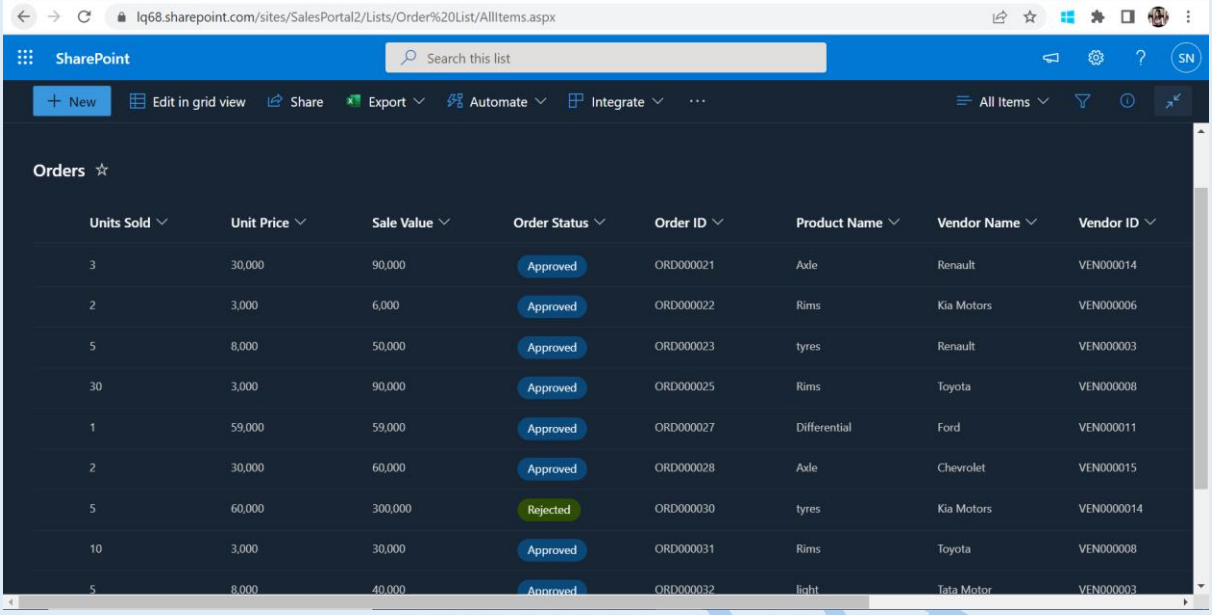






Case 3: Added record in order list with value of Sales Value greater than 1, 00,000. And the Manager will reject the order.

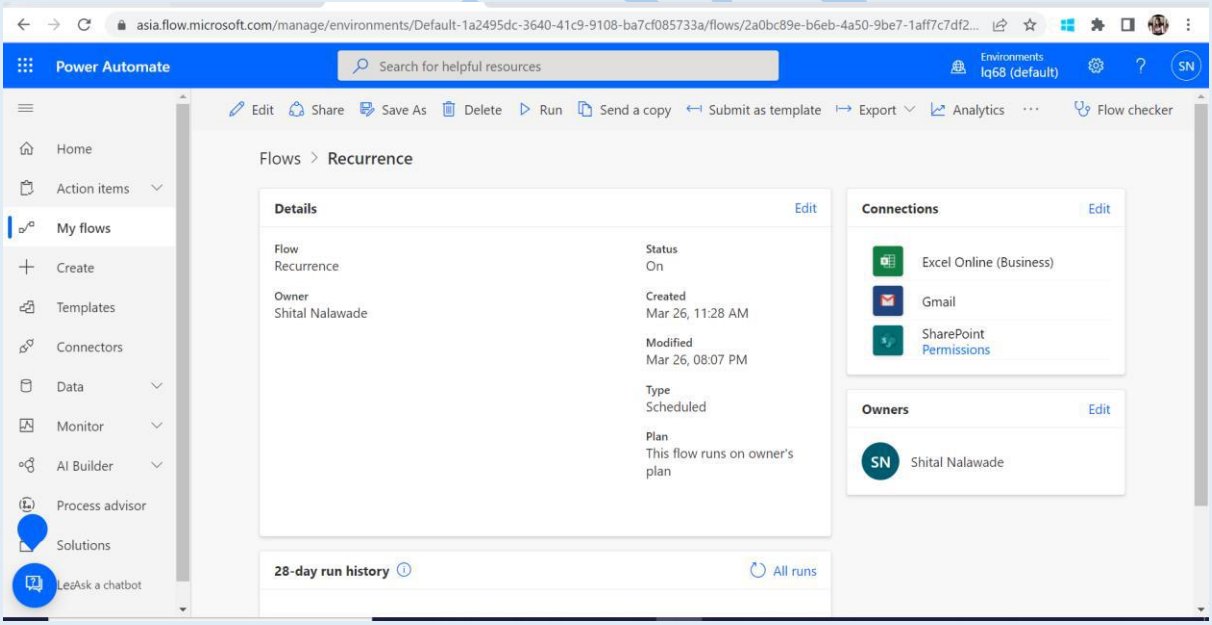


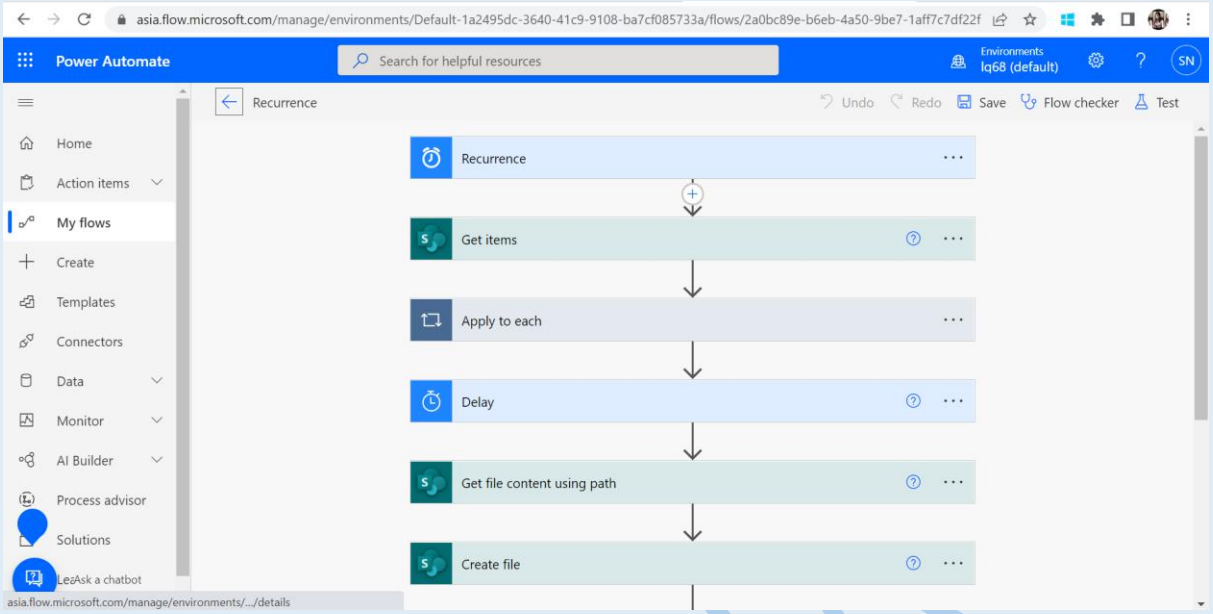


Units Sold	Unit Price	Sale Value	Order Status	Order ID	Product Name	Vendor Name	Vendor ID
3	30,000	90,000	Approved	ORD000021	Axle	Renault	VEN000014
2	3,000	6,000	Approved	ORD000022	Rims	Kia Motors	VEN000006
5	8,000	50,000	Approved	ORD000023	tyres	Renault	VEN000003
30	3,000	90,000	Approved	ORD000025	Rims	Toyota	VEN000008
1	59,000	59,000	Approved	ORD000027	Differential	Ford	VEN000011
2	30,000	60,000	Approved	ORD000028	Axle	Chevrolet	VEN000015
5	60,000	300,000	Rejected	ORD000030	tyres	Kia Motors	VEN0000014
10	3,000	30,000	Approved	ORD000031	Rims	Toyota	VEN000008
5	8,000	40,000	Approved	ORD000032	light	Tata Motor	VEN000003

->Sales Report Flow

Step 1: Go to India.flow.microsoft.com and click create flow and select “Create SharePoint item for Excel Online(Business) worksheet on daily basis”.

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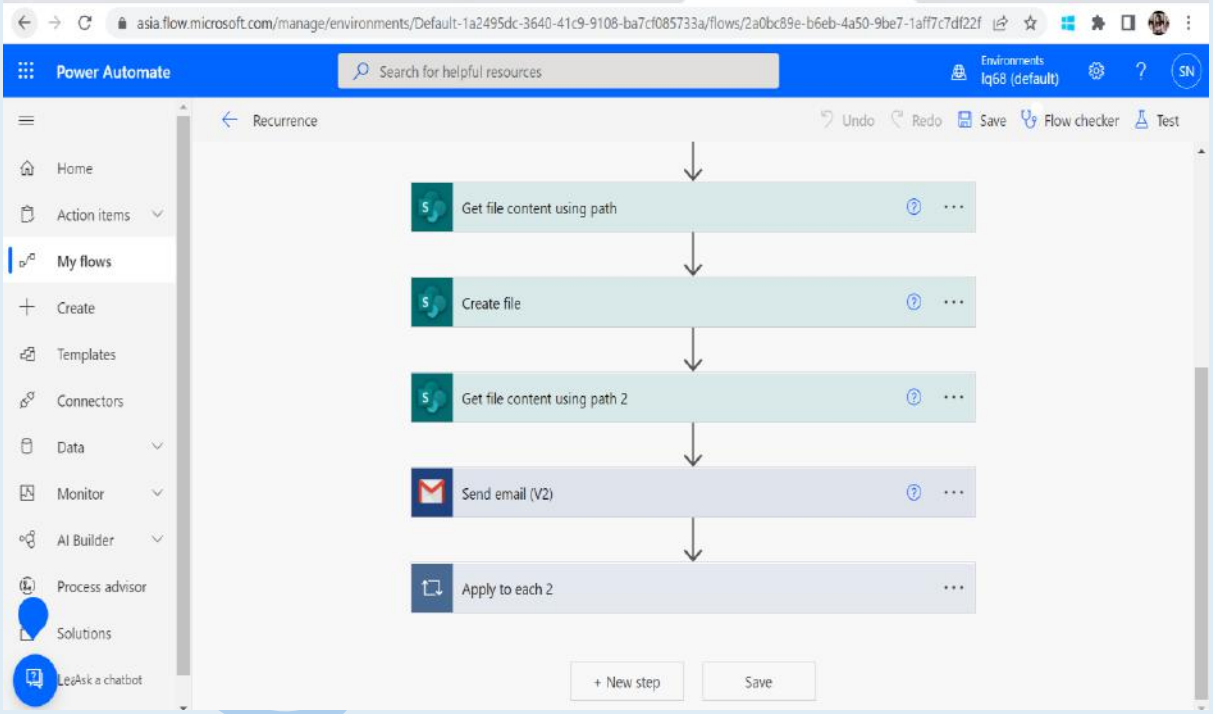
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Recurrence
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
LeeAsk a chatbot
Recurrence
Get items
Apply to each
Delay
Get file content using path
Create file
asia.flow.microsoft.com/manage/environments/.../details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Search for helpful resources
Environments
lq68 (default)
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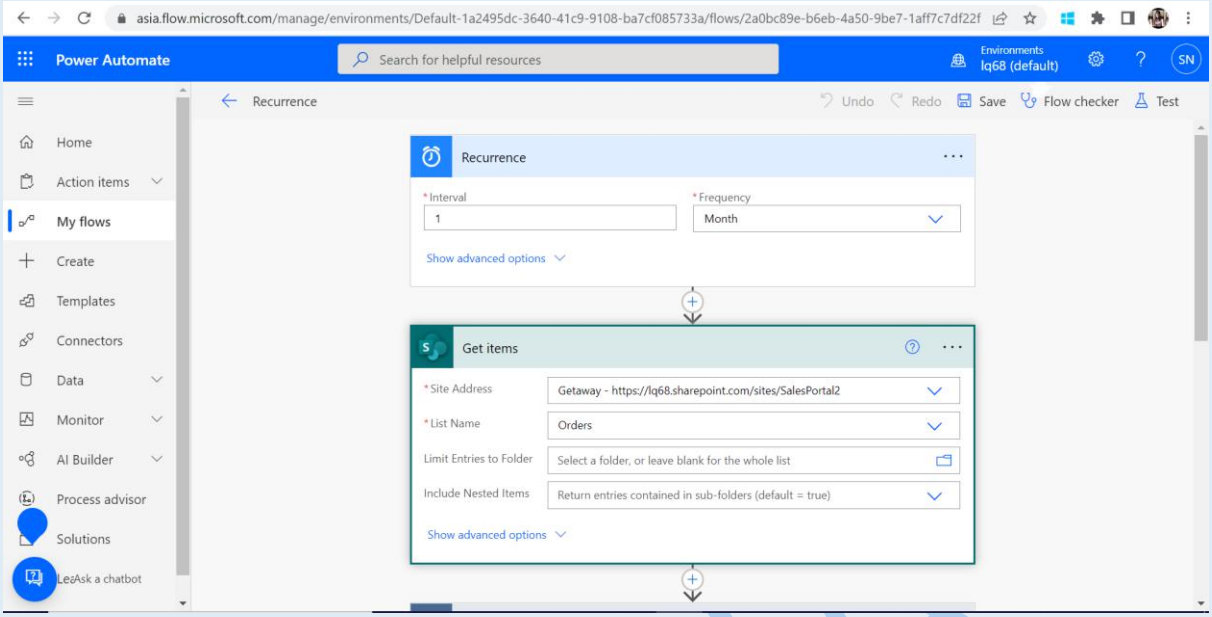
Recurrence
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
LeeAsk a chatbot
Get file content using path
Create file
Get file content using path 2
Send email (V2)
Apply to each 2
+ New step
Save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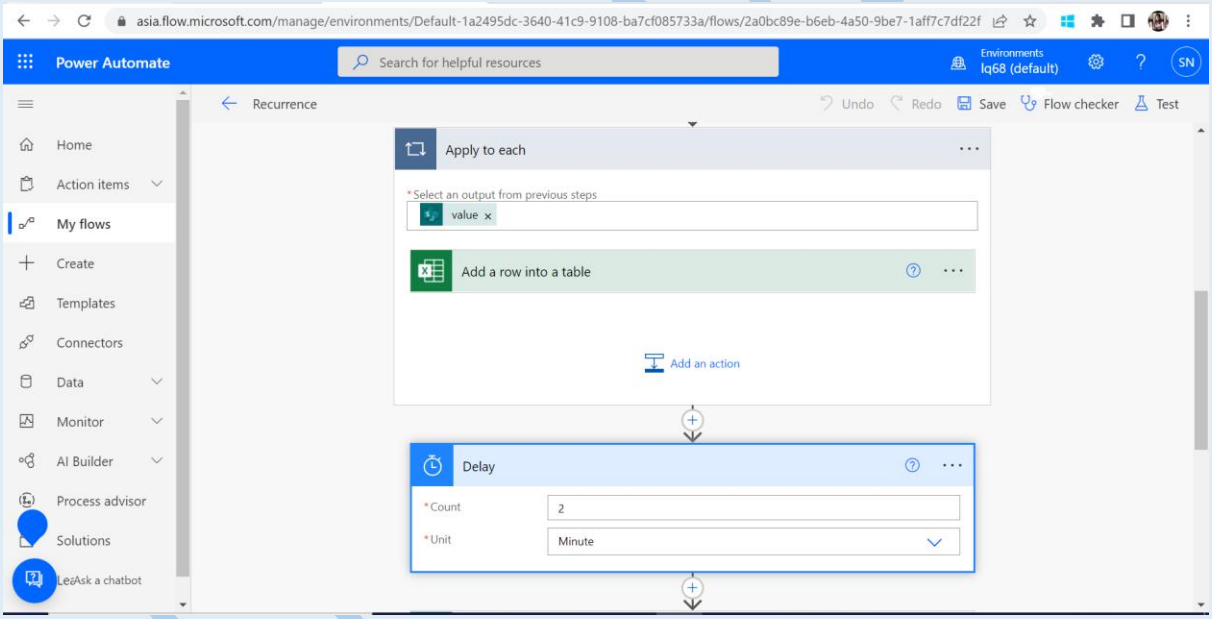
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Recurrence
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Recurrence
* Interval
1
* Frequency
Month
Show advanced options
Get items
* Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
* List Name
Orders
Limit Entries to Folder
Select a folder, or leave blank for the whole list
Include Nested Items
Return entries contained in sub-folders (default = true)
Show advanced options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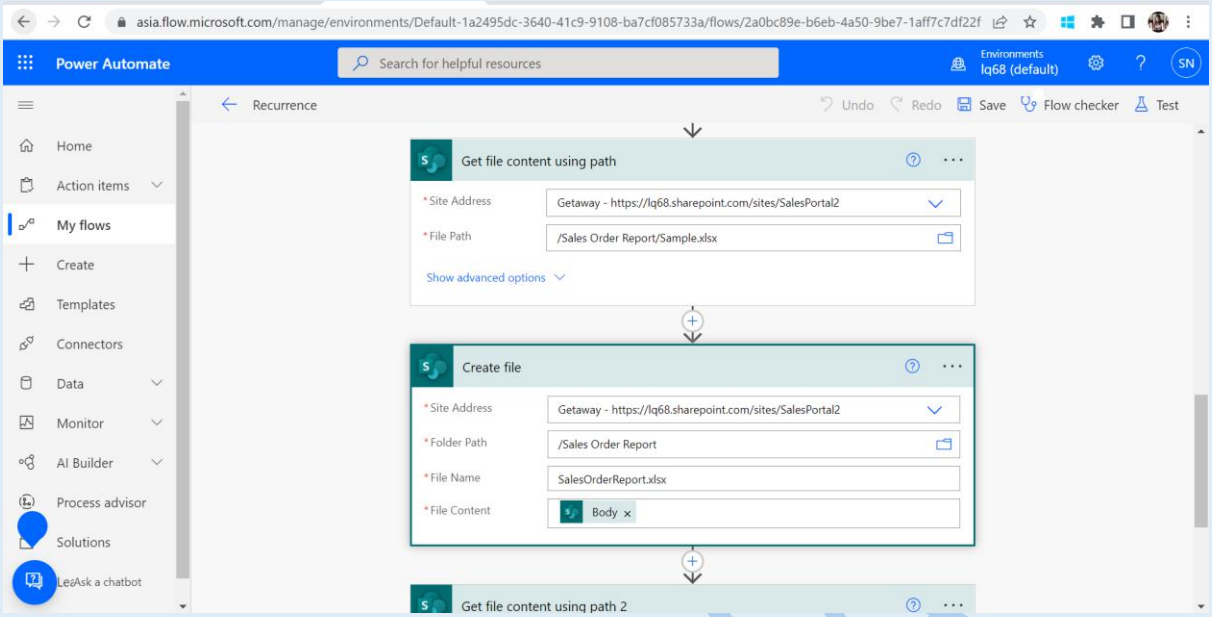
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Recurrence
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Apply to each
* Select an output from previous steps
value
Add a row into a table
Add an action
Delay
* Count
2
* Unit
Minute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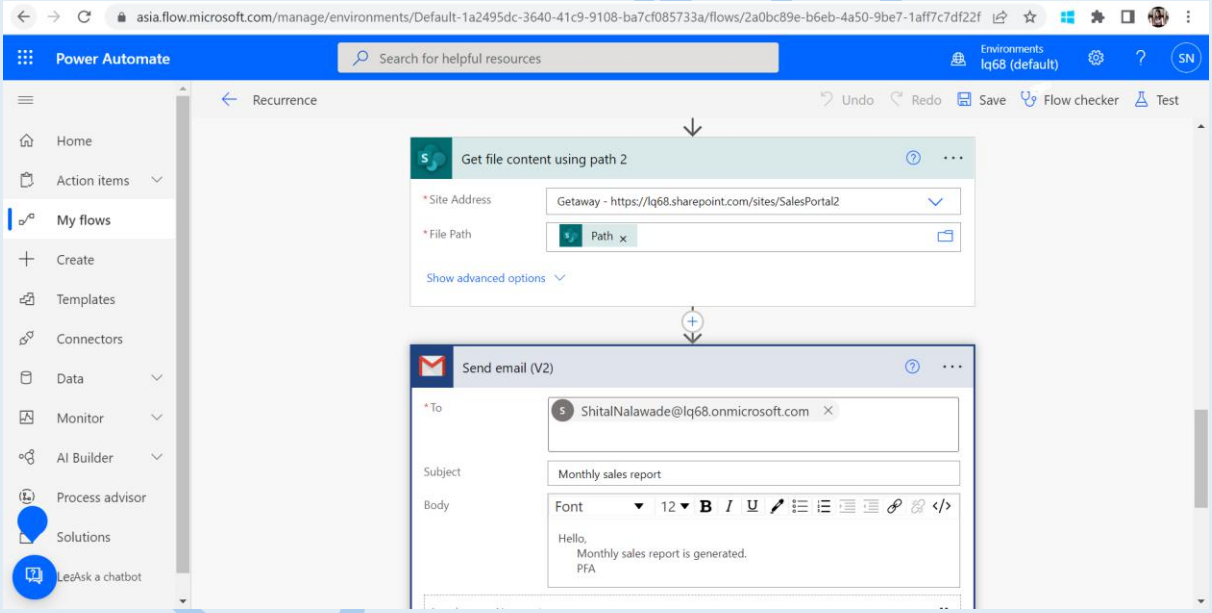
Power Automate
Search for helpful resources
Environments
lq68 (default)
SN
Recurrence
Undo
Redo
Save
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Get file content using path
*Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
*File Path
/Sales Order Report/Sample.xlsx
Show advanced options
Create file
*Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
*Folder Path
/Sales Order Report
*File Name
SalesOrderReport.xlsx
*File Content
Body
Get file content using path 2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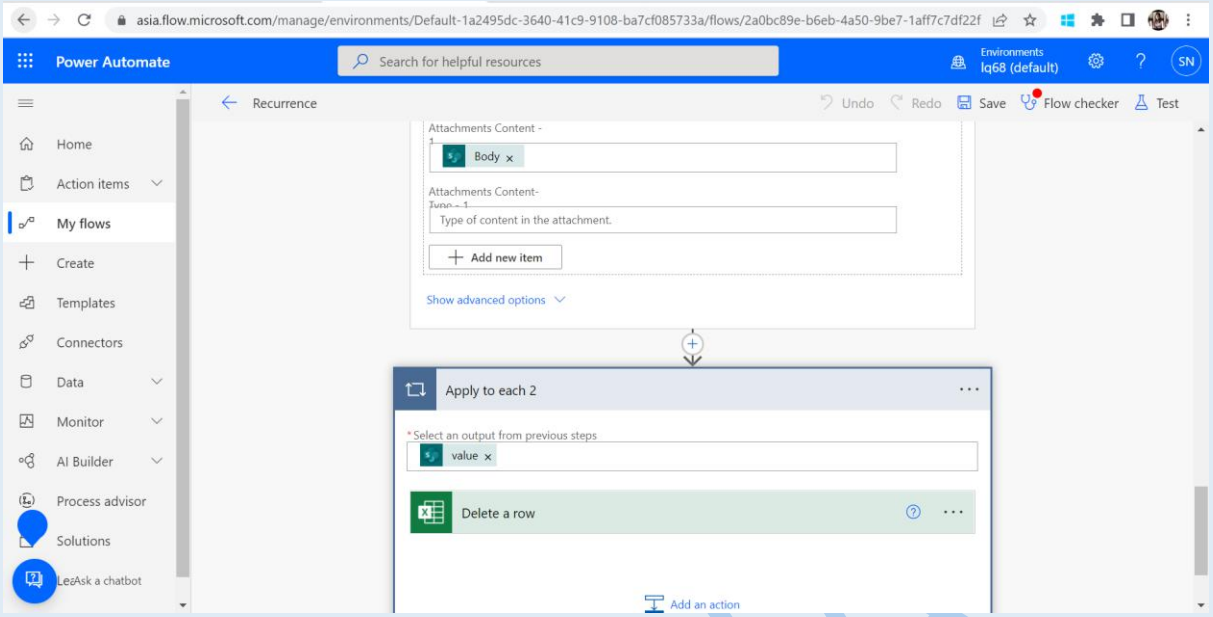
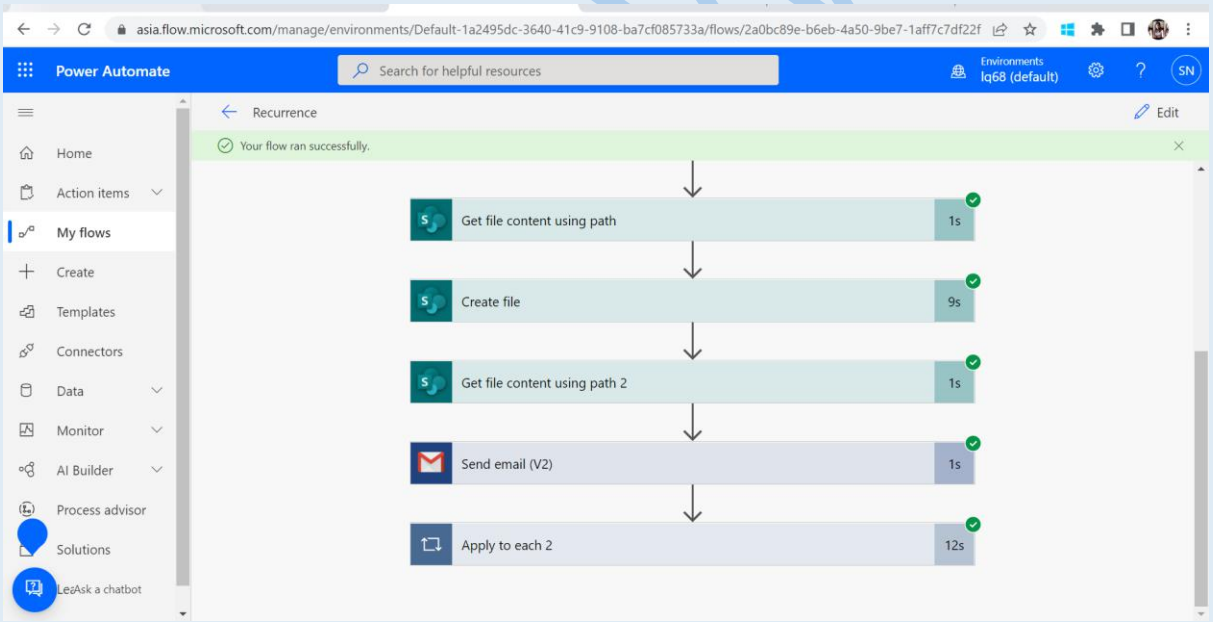
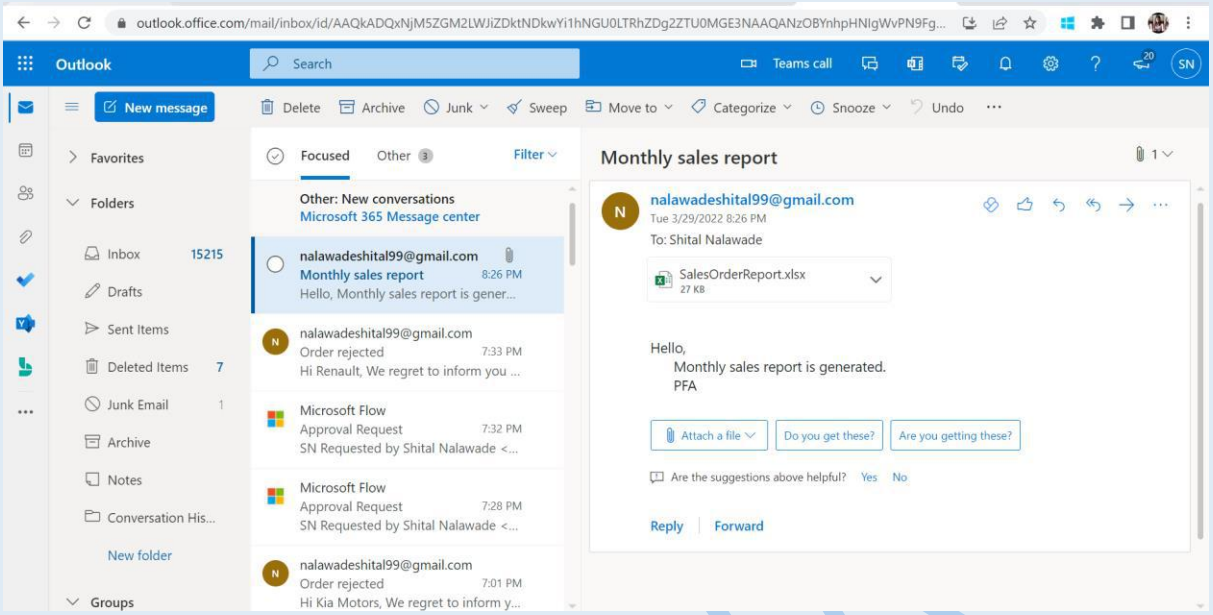
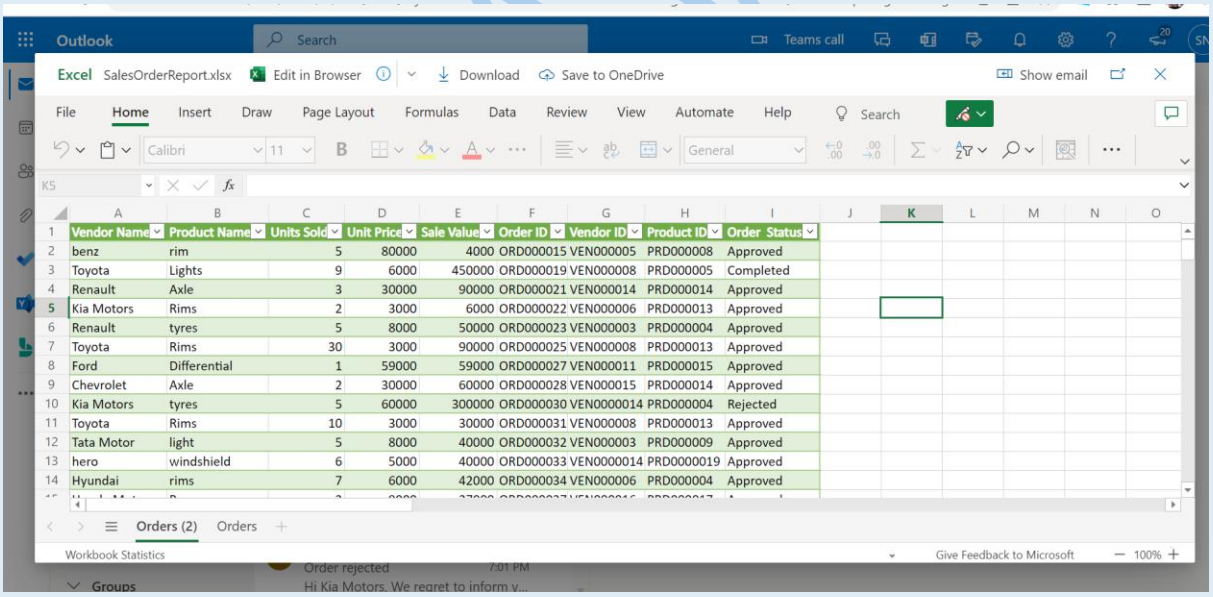
Flow checker
Test
Home
Action items
My flows
Create
Templates
Connectors
Data
Monitor
AI Builder
Process advisor
Solutions
Ask a chatbot
Get file content using path 2
*Site Address
Getaway - https://lq68.sharepoint.com/sites/SalesPortal2
*File Path
Path
Show advanced options
Send email (V2)
*To
ShitalNalawade@lq68.onmicrosoft.com
Subject
Monthly sales report
Body
Font
12
Hello,
Monthly sales report is generated.
PFA



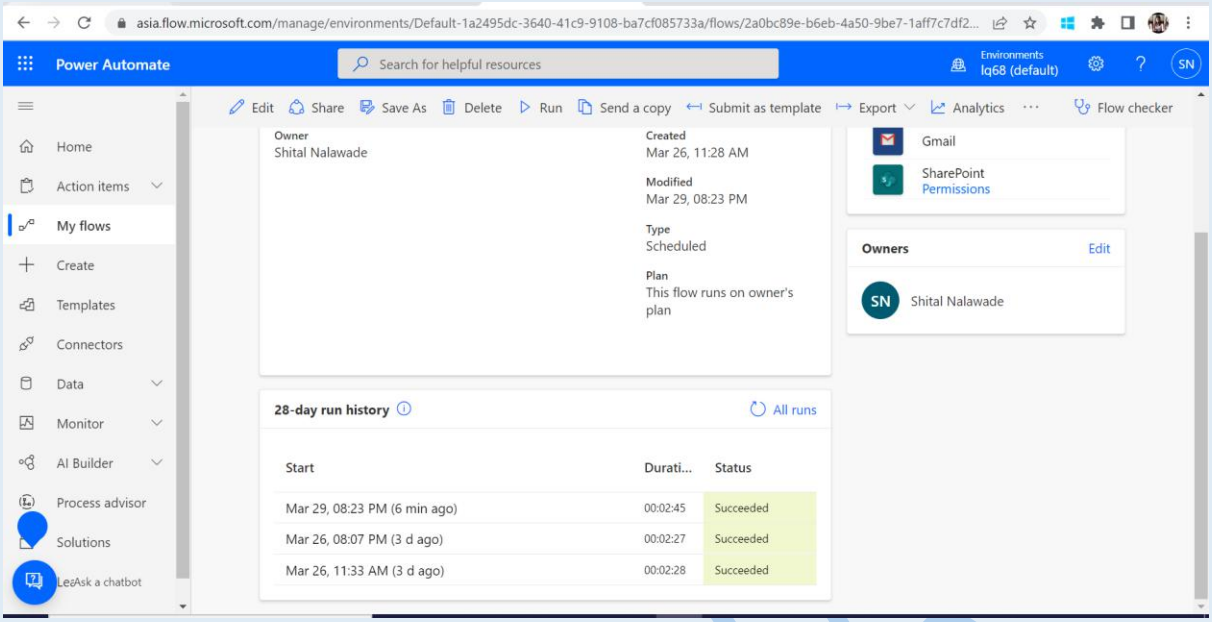
Testing the flow.







Vendor Name	Product Name	Units Sold	Unit Price	Sale Value	Order ID	Vendor ID	Product ID	Order Status
benz	rim	5	80000	4000	ORD000015	VEN000005	PRD000008	Approved
Toyota	Lights	9	6000	450000	ORD000019	VEN000008	PRD000005	Completed
Renault	Axle	3	30000	90000	ORD000021	VEN000014	PRD000014	Approved
Kia Motors	Rims	2	3000	6000	ORD000022	VEN000006	PRD000013	Approved
Renault	tyres	5	8000	50000	ORD000023	VEN000003	PRD000004	Approved
Toyota	Rims	30	3000	90000	ORD000025	VEN000008	PRD000013	Approved
Ford	Differential	1	59000	59000	ORD000027	VEN000011	PRD000015	Approved
Chevrolet	Axle	2	30000	60000	ORD000028	VEN000015	PRD000014	Approved
Kia Motors	tyres	5	60000	300000	ORD000030	VEN0000014	PRD000004	Rejected
Toyota	Rims	10	3000	30000	ORD000031	VEN000008	PRD000013	Approved
Tata Motor	light	5	8000	40000	ORD000032	VEN000003	PRD000009	Approved
hero	windshield	6	5000	40000	ORD000033	VEN0000014	PRD0000019	Approved
Hyundai	rims	7	6000	42000	ORD000034	VEN000006	PRD000004	Approved



THE END

GETAWA