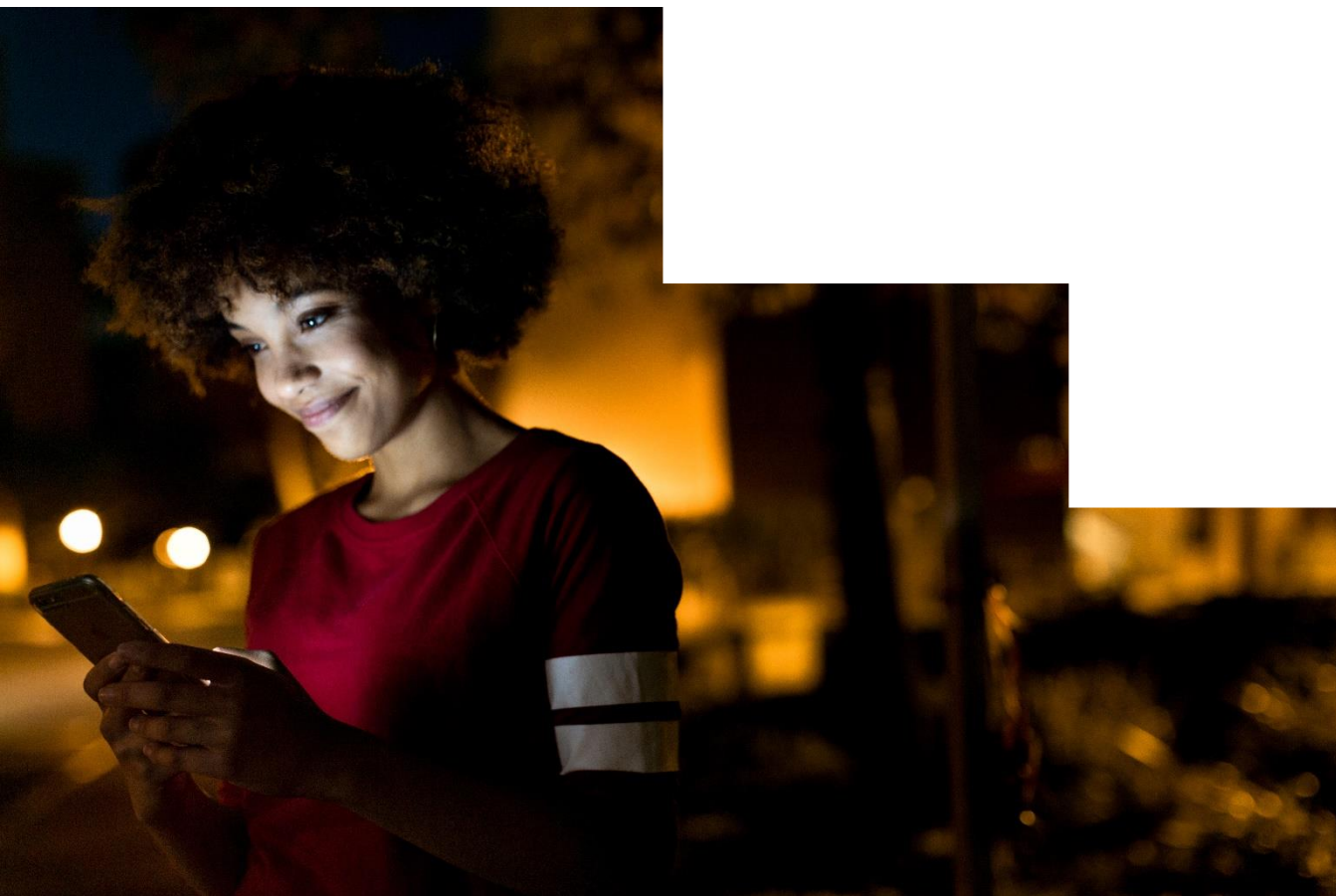


Robotic Process Automation in a Day

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

30 mins

April 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.

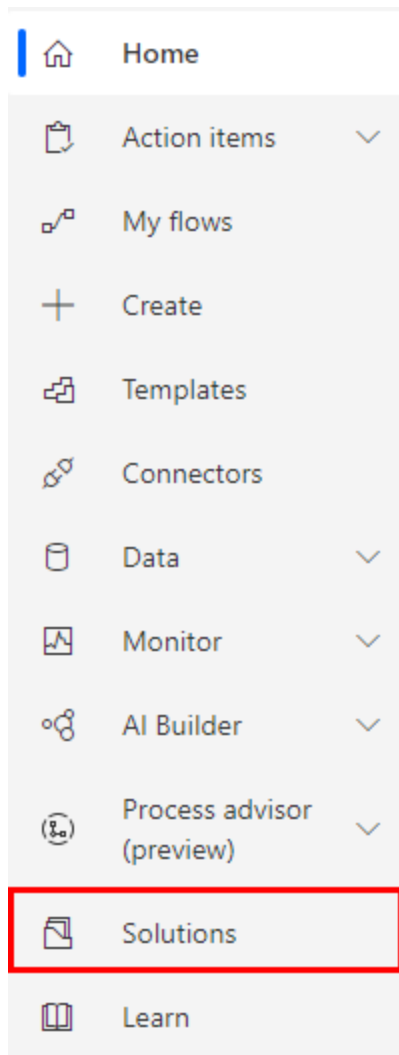
Customizers and developers distribute solutions so that organizations can use Microsoft Dataverse to install and uninstall the business functionality defined by the solution. For additional information about Solutions, please see the following link:

<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 flow.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**.

Display name		Name
RPA in a day - Process Advisor	...	RPAINadayProc
Process Mining Anchor	...	ProcessMining,
Process Mining	...	ProcessMining
Power Apps Checker Base	...	msdyn_PowerA
Power Apps Checker	...	msdyn_PowerA
Contextual Help Base	...	msdyn_Contexti
Contextual Help	...	msdyn_Contexti
Common Data Services Default Solution	...	Crfc06b
Default Solution	...	Default

4. Name the solution **Invoice processing solution** <-my first name>. Set **CDS Default Publisher** as Publisher. Then click **Create**.

New solution ✕

Display name *

Invoice Processing Solution <MyUserName>

Name *

InvoiceProcessingSolutionMyUserName

Publisher *

CDS Default Publisher

Edit publisher

Version *

1.0.0.0

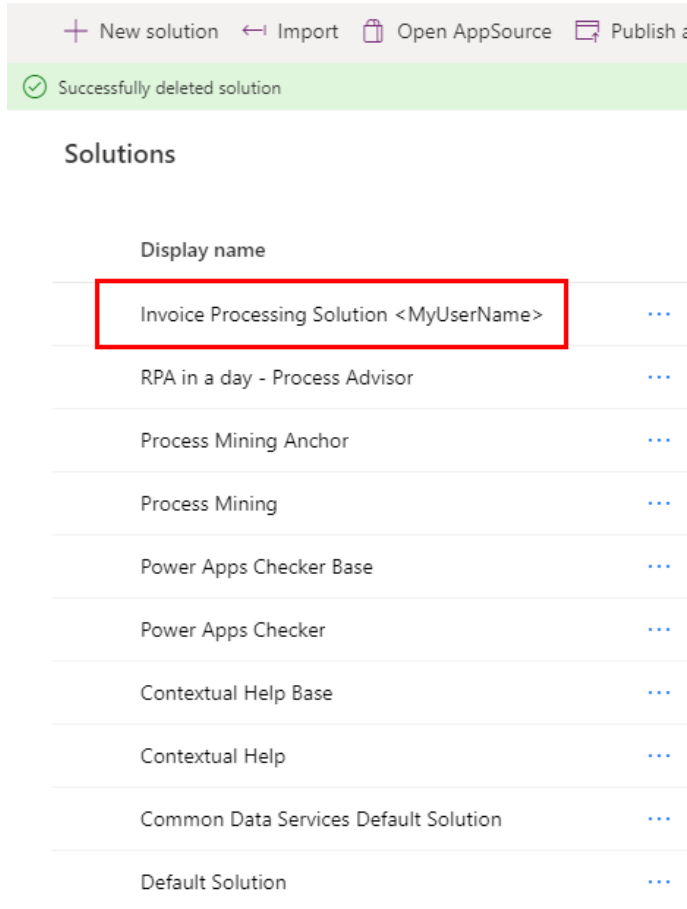
[More options](#) ∨

Create

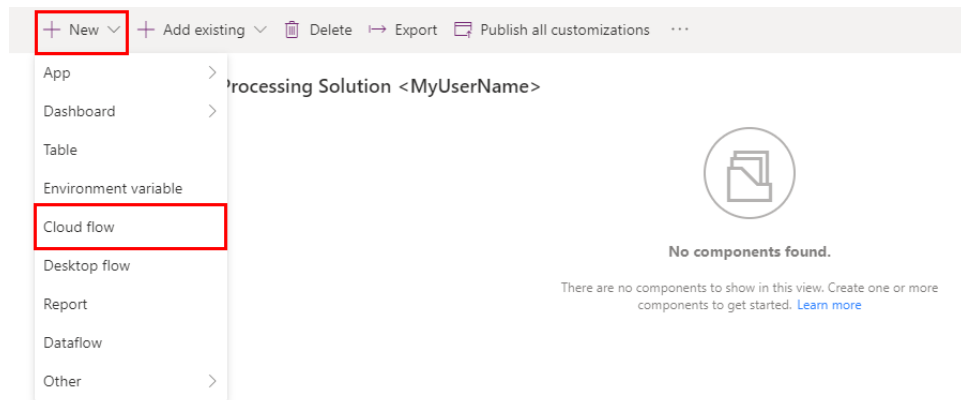
Cancel

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>

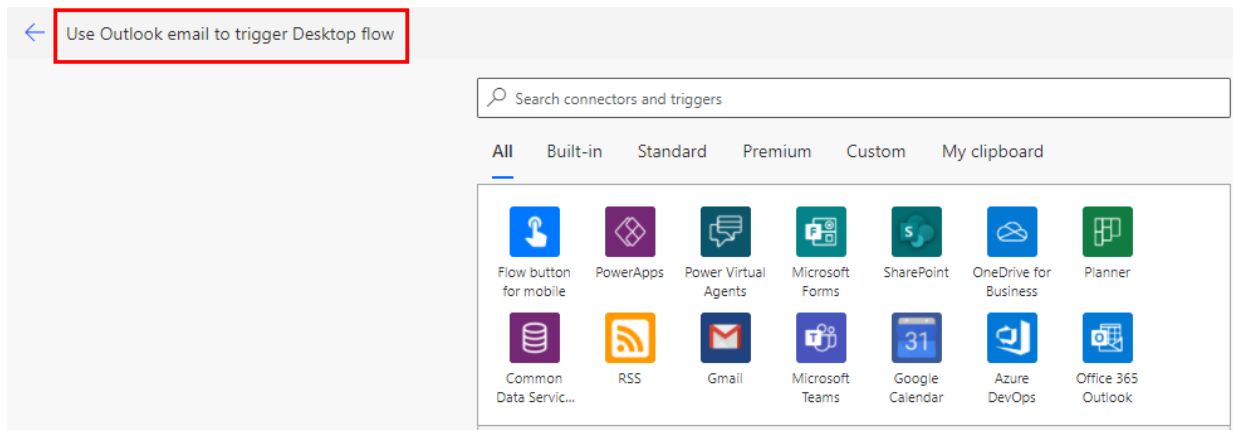
5. Open the new solution you just created by clicking on the name of the solution.



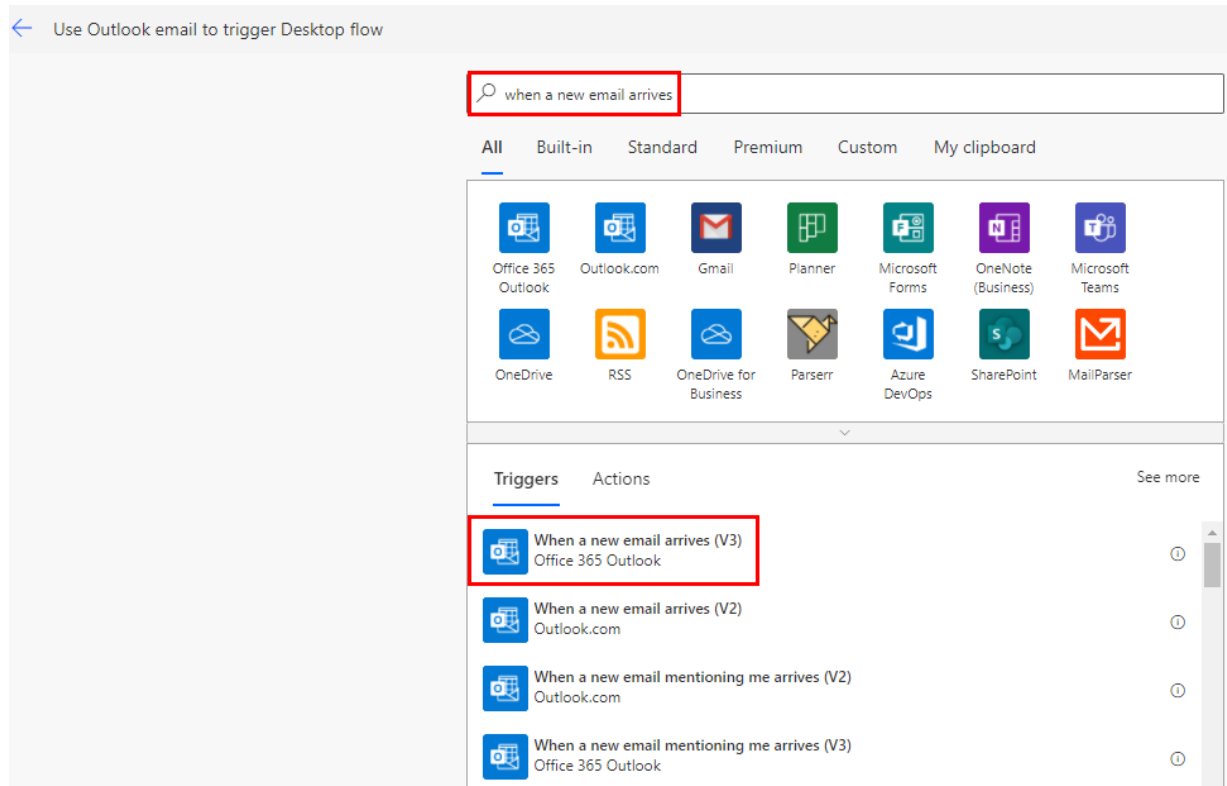
6. Click **+New > Cloud flow**



7. Name the flow **Use Outlook email to trigger Desktop flow.**

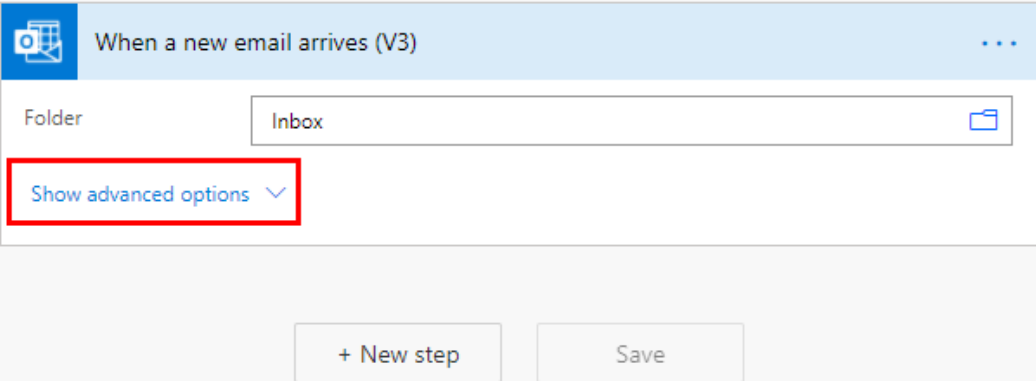


8. Search for **when a new email arrives** in the search bar then select **When a new email arrives (V3)** under Triggers.



9. Sign in with your Outlook account. Click **Show advanced options**.

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



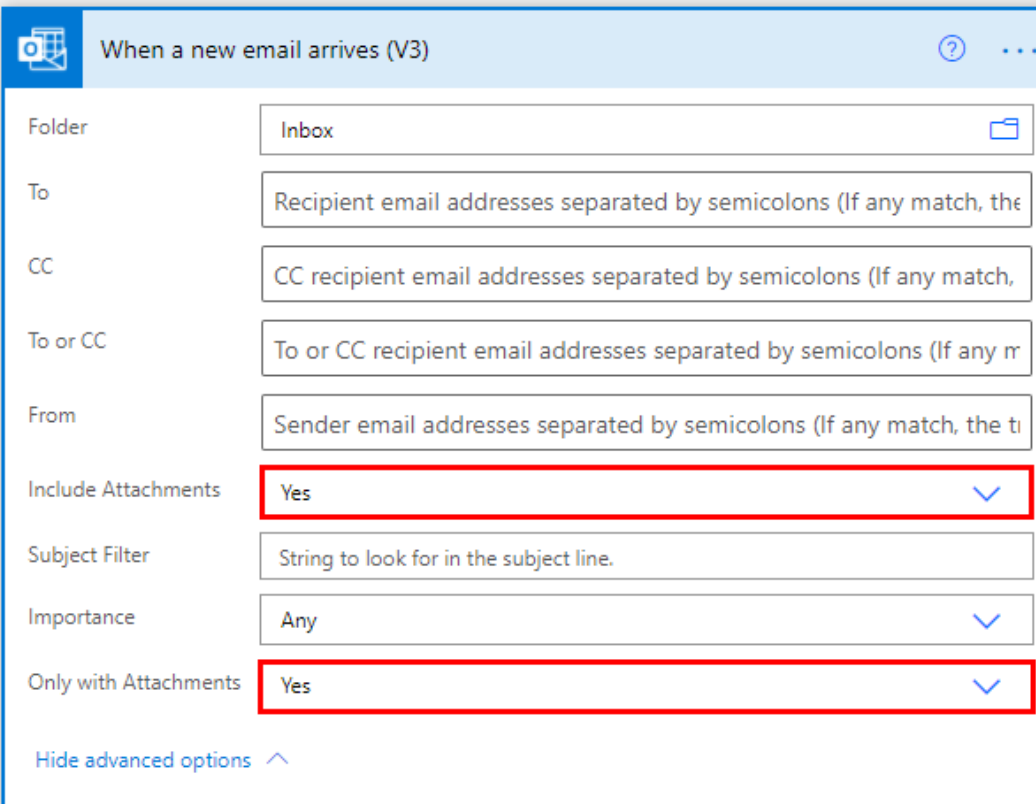
When a new email arrives (V3) ...

Folder: Inbox

Show advanced options ▾

+ New step Save

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



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 r

From: Sender email addresses separated by semicolons (If any match, the ti

Include Attachments: Yes ▾

Subject Filter: String to look for in the subject line.

Importance: Any ▾

Only with Attachments: Yes ▾

Hide advanced options ^


11. Enter new invoice in Subject Filter box.





The screenshot shows the configuration window for the 'When a new email arrives (V3)' trigger in Microsoft Power Automate. The window has a light blue header with the trigger icon and title. Below the header, there are several configuration fields. The 'Subject Filter' field is highlighted with a red rectangular border and contains the text 'new invoice'. Other fields include 'Folder' (Inbox), 'To', 'CC', 'To or CC', 'From', 'Include Attachments' (Yes), 'Importance' (Any), and 'Only with Attachments' (Yes). A 'Hide advanced options' link is at the bottom left.


Field	Value
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](#) ^

12. Click +New step.

 When a new email arrives (V3) ...

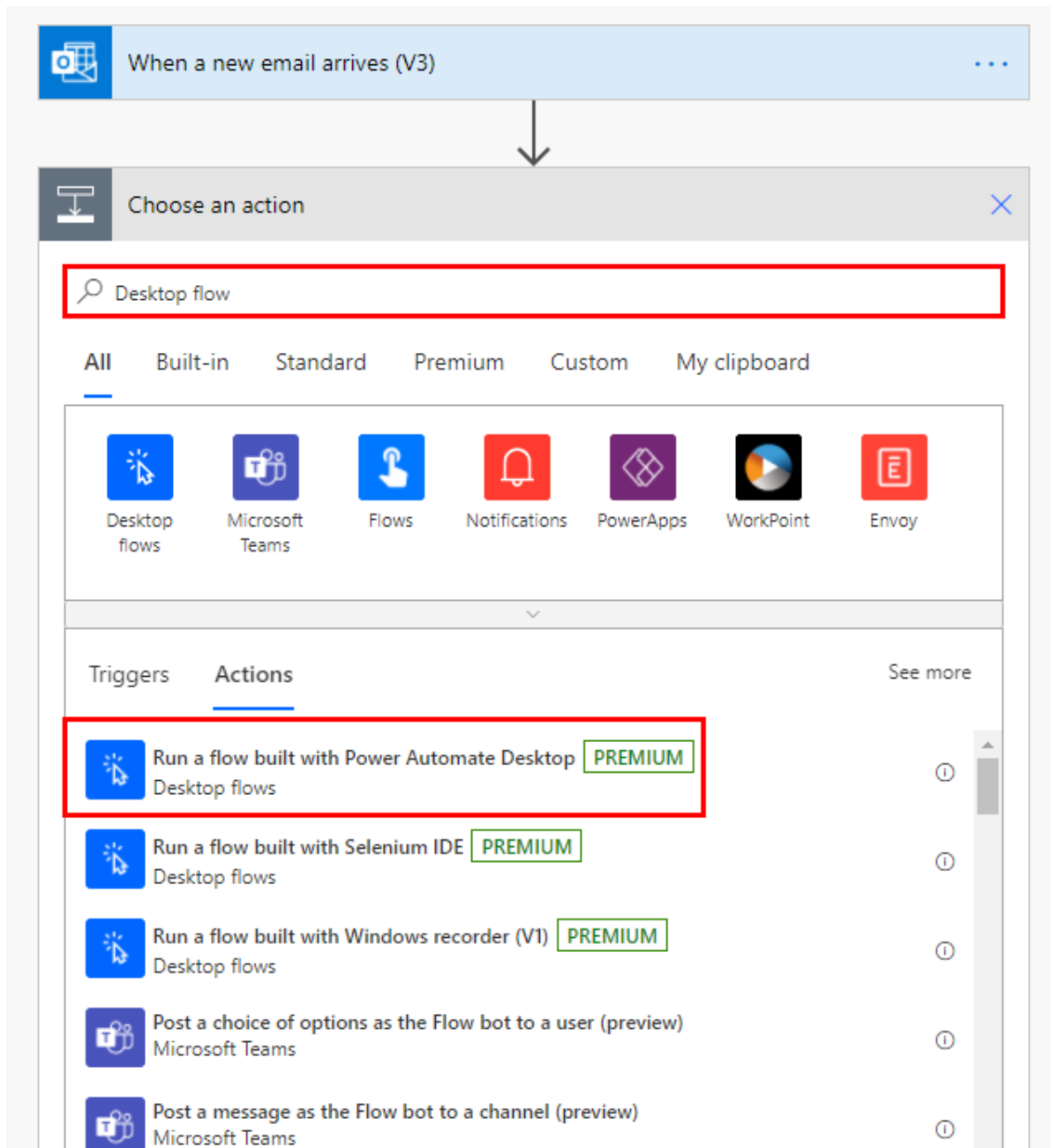
Folder	Inbox 
To	Recipient email addresses separated by semicolons (If any match, the
CC	CC recipient email addresses separated by semicolons (If any match, :
To or CC	To or CC recipient email addresses separated by semicolons (If any m
From	Sender email addresses separated by semicolons (If any match, 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 a gateway connection previously in Lab #4, step #8.

14. Select your gateway and enter the password. Then click **Create**.

When a new email arrives (V3)

Desktop flows

Use your credentials to create a connection to an on-premises data gateway and securely connect your locally stored data to Power Automate and other Microsoft services. [Learn more](#)

* Gateway name *

+ New gateway

* Domain and username

* Password

Create

+ New step Save

15. Under Desktop flow, select **Enter an invoice**.

The screenshot shows the Power Automate Desktop interface. At the top, a trigger step "When a new email arrives (V3)" is visible. Below it, a new step is being added, titled "Run a flow built with Power Automate Desktop". This step configuration panel includes:

- * Desktop flow:** A dropdown menu with "Enter an invoice" selected. This dropdown is highlighted with a red border. An "Edit" button is to its right.
- * Run Mode:** A dropdown menu with "Choose between running while signed in (attended) or in the background" selected. A red border highlights this dropdown, and a red error message "'Run Mode' is required." is displayed below it.
- Amount:** A text input field with the placeholder text "Amount".
- Contact:** A text input field with the placeholder text "Contact email".
- Account name:** A text input field with the placeholder text "Account name".
- Show advanced options:** A link with a downward arrow.

At the bottom of the interface, there are two buttons: "+ New step" and "Save".

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

The screenshot shows the Power Automate interface. At the top, a trigger box labeled "When a new email arrives (V3)" is connected to a desktop flow action box labeled "Run a flow built with Power Automate Desktop". The desktop flow action box is expanded, showing the following configuration:

- * Desktop flow:** Enter an invoice (with an "Edit" button)
- * Run Mode:** Attended - Runs when you're signed in (highlighted with a red box)
- Amount:** Amount
- Contact:** Contact email
- Account name:** Account name
- Show advanced options:** (with a dropdown arrow)

At the bottom of the interface, there are two buttons: "+ New step" and "Save".

17. Fill the box with these values:

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

When a new email arrives (V3)

Run a flow built with Power Automate Desktop

* Desktop flow: Enter an invoice Edit

* Run Mode: Attended - Runs when you're signed in ▼

Amount: \$200

Contact: b.friday@wingtip toys.com

Account name: WingTip Toys

[Show advanced options](#) ▼

+ New step Save

18. Save the flow.

The screenshot shows the Microsoft Power Automate interface. The first step in the flow is "When a new email arrives (V3)". An arrow points down to the second step, "Run a flow built with Power Automate Desktop". Below this step, there are several configuration fields:

- * Desktop flow: Enter an invoice (with an "Edit" button)
- * Run Mode: Attended - Runs when you're signed in (with a dropdown arrow)
- Amount: \$200
- Contact: b.friday@wingtip toys.com
- Account name: WingTip Toys

Below these fields is a link "Show advanced options" with a dropdown arrow. At the bottom of the interface, there are two buttons: "+ New step" and "Save". The "Save" button is highlighted with a red rectangle.

19. Test the flow by clicking **Test**. Since this flow has a trigger, the flow will run automatically if that trigger condition happens. So now send yourself an email with an **attachment** (use the file under the lab data package folder that you downloaded for this workshop) and put “new invoice” in the email title, to test out this flow.

Use Outlook email to trigger Desktop flow

Save Flow checker **Test**

When a new email arrives (V3)

Run a flow built with Power Automate Desktop

* Desktop flow: Enter an invoice **Edit**

* Run Mode: Attended - Runs when you're signed in

Amount: \$200

Contact: b.friday@wingtip toys.com

Account name: WingTip Toys

Show advanced options

+ New step Save

20. Your flow should run successfully.

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 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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