P06: Creating a Notification Flow in Power Automate

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Context

Item	Detail
Tag	Vertical Patterns | Power Apps
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Version Control	V1.0
Application Use Case	Send a notification when a case/lead/opportunity is assigned
Reference Usage	Automating case assignment notifications using Power Automate

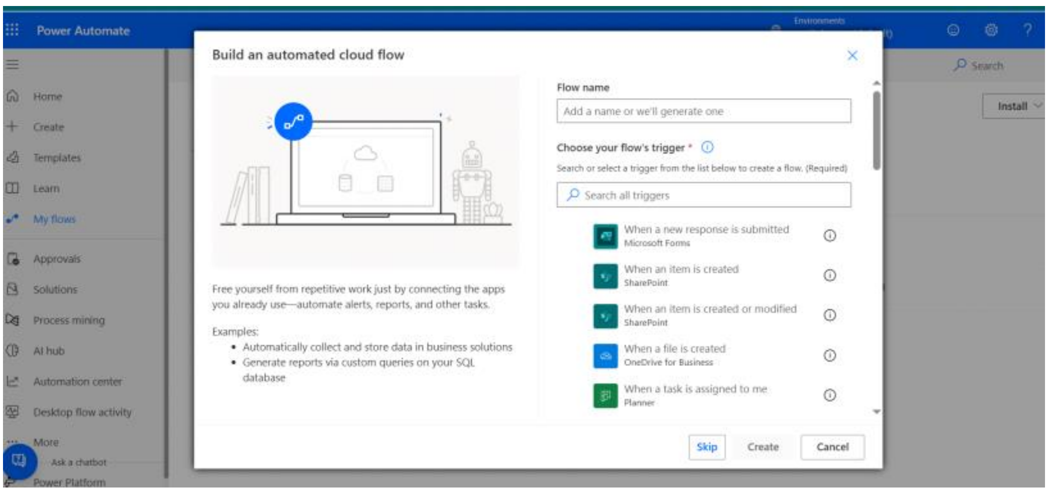
Story Behind The Pattern

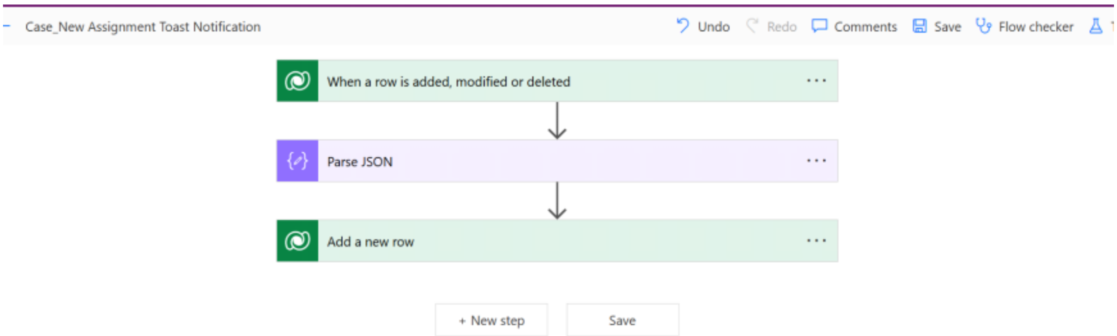
Item	Detail
The Problem	Users are not immediately notified of new case/lead/opportunity assignments, leading to delays in action.
The Solution	Create a Power Automate flow to trigger a notification and log it when a case/opportunity/lead is added, modified, or deleted.
Dependencies	Power Automate environment, permissions to create flows and access tables.

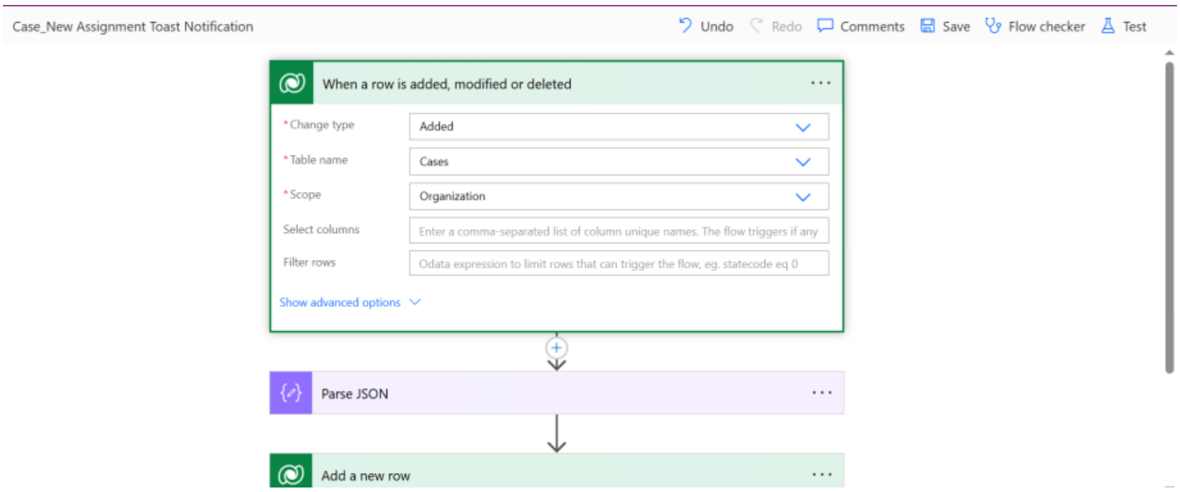
The Pattern

Method: Setting Up a Notification Flow

Here’s a step-by-step guide to create a Power Automate flow that sends a toast notification when a case is assigned by adding a row to a Notifications table:

1. Create a New Flow in Power Automate
    - Log in to the Power Automate portal (make.powerautomate.com).
    - Click Create and select Automated cloud flow.
    - Name the flow (e.g., "Case_New Assignment Toast Notification") and click Create.
    - Choose the trigger When a row is added, modified or deleted from the Dataverse connector.
    - 

2. Configure the Trigger
   - In the trigger settings, set the following:
     - Change type: Select "Added, Modified" (to trigger on new or updated cases; exclude "Deleted" if not needed).
     - Table name: Select "Cases" from the dropdown.
     - Scope: Choose "Organization" to apply the trigger across the organization.
     - Select columns: Leave blank or enter specific columns (e.g., "Case Title," "Owner") to optimize performance.
     - Filter rows: Optionally, add an OData expression (e.g., `statuscode eq 1`) to limit triggers to active cases.
   - Click Save to proceed.
   - 

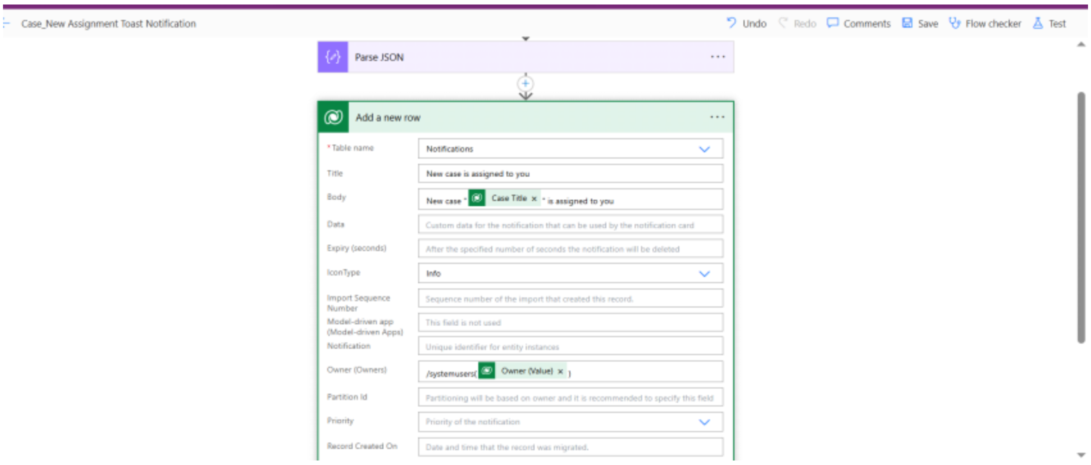


3. Add a Parse JSON Action
   - Click + New step below the trigger.
   - Search for and select the Parse JSON action.
   - In the Content field, select the "Body" output from the trigger (this contains the row data in JSON format).
   - In the Schema field, click Generate from sample and paste a sample JSON payload (e.g., the one from the screenshot):

```json
{
  "link": {
    "actions": [
      {
        "title": "View Record",
        "data": {
          "url": "https://investuae-crm15.dynamics.com/main.aspx?appid=26d2c10d-5b88-ef11-
        }
      }
    ]
  }
}
```

- Click Done to generate the schema. This step parses the JSON to extract actionable data (e.g., URLs or case details).

4. Add a New Row to the Notifications Table
   - Click + New step below the Parse JSON action.
   - Search for and select Add a new row (Dataverse connector).
   - In the Table name field, select "Notifications" (or create a new table with columns like "Title," "Body," "Owner").
   - Configure the row details:
     - Title: Enter a dynamic value, e.g., "New case is assigned to you" or use an expression like concat('New case ', triggerOutputs()?['body/case_title'], ' is assigned to you').
     - Body: Enter a dynamic value, e.g., "New case [Case Title] is assigned to you" with an icon (e.g., concat('New case ', triggerOutputs()?['body/case_title'], ' is assigned to you')).
     - Data: Leave blank or add custom data (e.g., a URL from the parsed JSON).
     - Expiry (seconds): Set to a value (e.g., 86400 for 24 hours) to auto-delete the notification.
     - IconType: Select "Info" from the dropdown.
     - Import Sequence Number: Leave blank unless tracking imports.
     - Model-driven apps: Leave blank (not used unless specified).
     - Notification: Set to a unique identifier (e.g., a GUID or dynamic value).
     - Owner: Select the owner dynamically (e.g., triggerOutputs()?['body/ownerid']) or manually.
     - Partition Id: Leave blank or set based on owner partitioning.

        - Priority: Set to "Normal" or another value from the dropdown.
        - Record Created On: Leave blank or use utcNow() for the current timestamp.
    - Click Save to store the notification.
    - 

5. Test and Validate the Flow
    - Click Test in the flow editor and select Manually or Automatically based on a recent case change.
    - Create, modify, or delete a case in the "Cases" table and check if the flow triggers.
    - Verify that a new row is added to the "Notifications" table with the correct title, body, and owner.
    - Ensure the toast notification appears in the Model-Driven App (if integrated).

6. Activate and Monitor the Flow
    - Once tested, click Save and then Turn on to activate the flow.
    - Monitor the flow runs in the Run history to ensure it executes without errors.
    - Adjust the flow (e.g., refine the JSON schema or notification fields) if issues arise.