

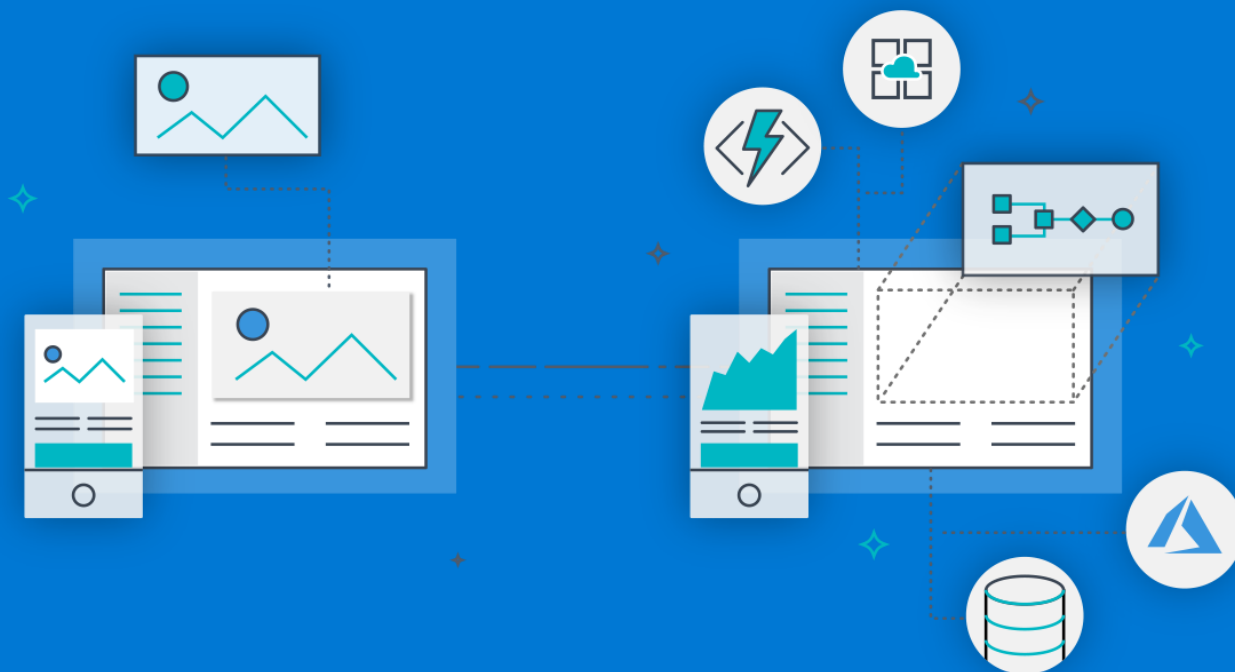


App in a Day

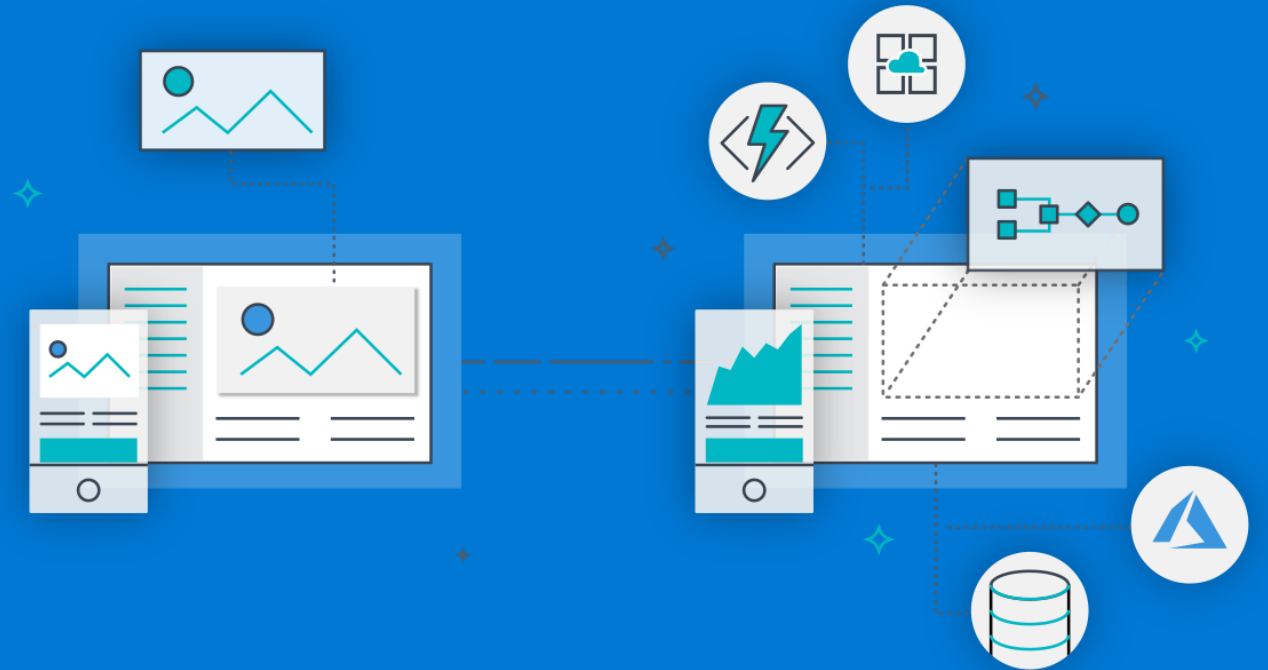
Business Application Platform

Power Apps, Power Automate
& Common Data Service (CDS)

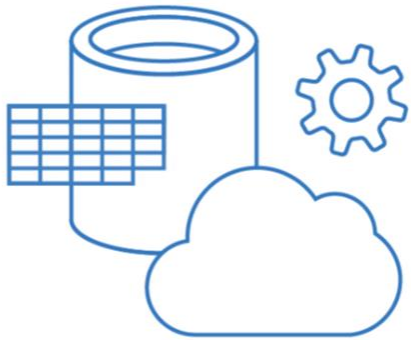
Eric Sauv , XRM Vision



Power Automate



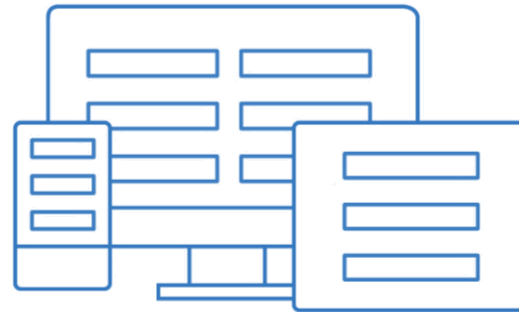
Power Automate is a service for automating workflows across apps and services



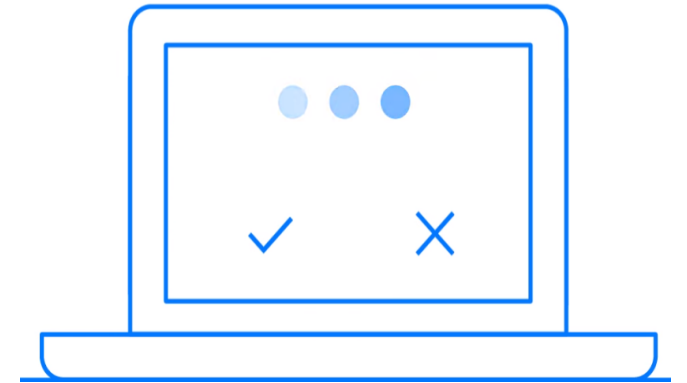
Connect to data & systems you're already using; create the data you need



Create workflows using triggers & actions without code or scripts



Edit flows on web and mobile



Approve requests or manage them on web and mobile

Common Scenarios

Automated approvals across data stores and services

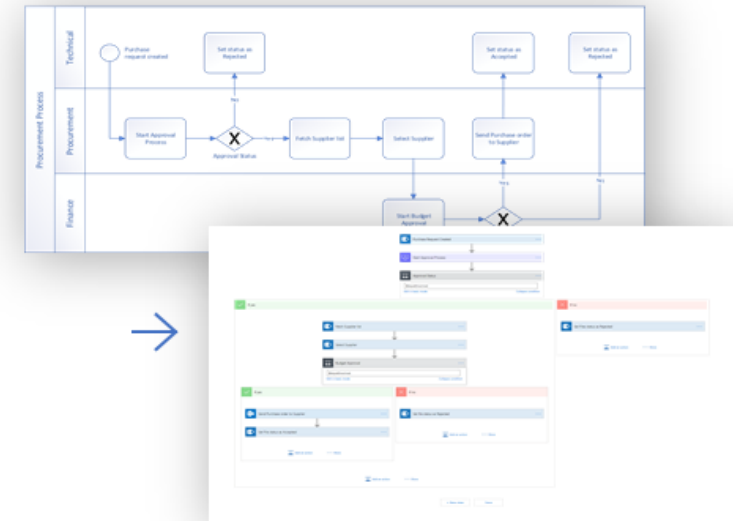
Recurring processing – e.g. expire all records over 7 days

Process guidance – interactive step by step completion of common business processes

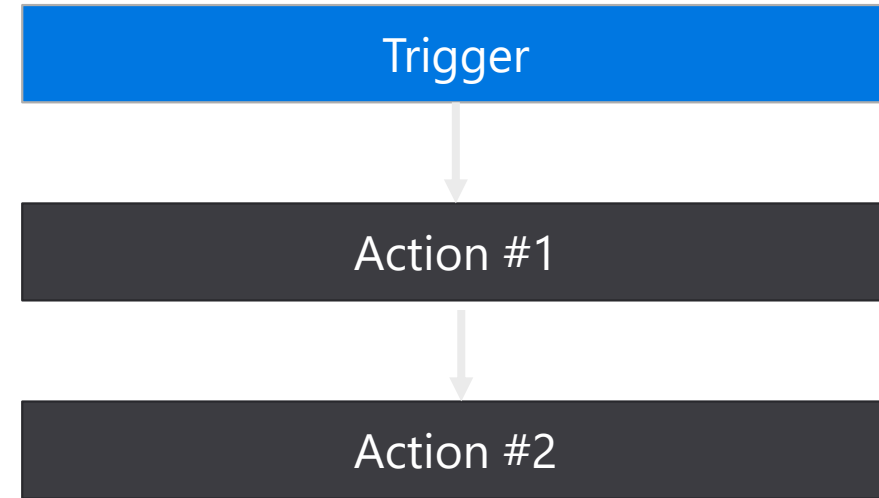
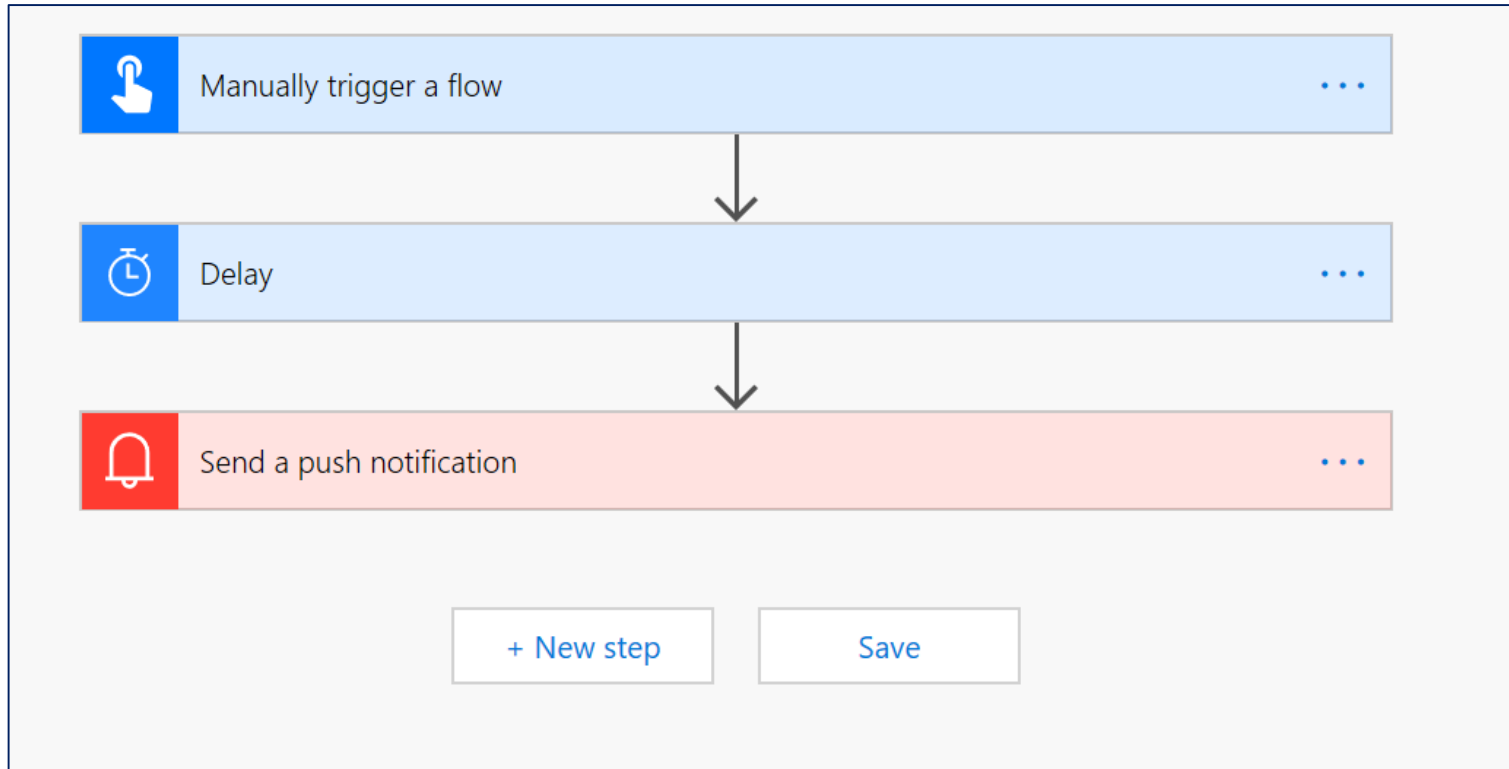
Automated triggering from data or service events e.g. record or file created

Mobile user clicks a button to kick off automation including context

Power App app user clicks a button to launch a flow in the background



What does a flow look like?



What makes up a flow?

Example: Notification flow

Trigger—the event that kicks off the flow:

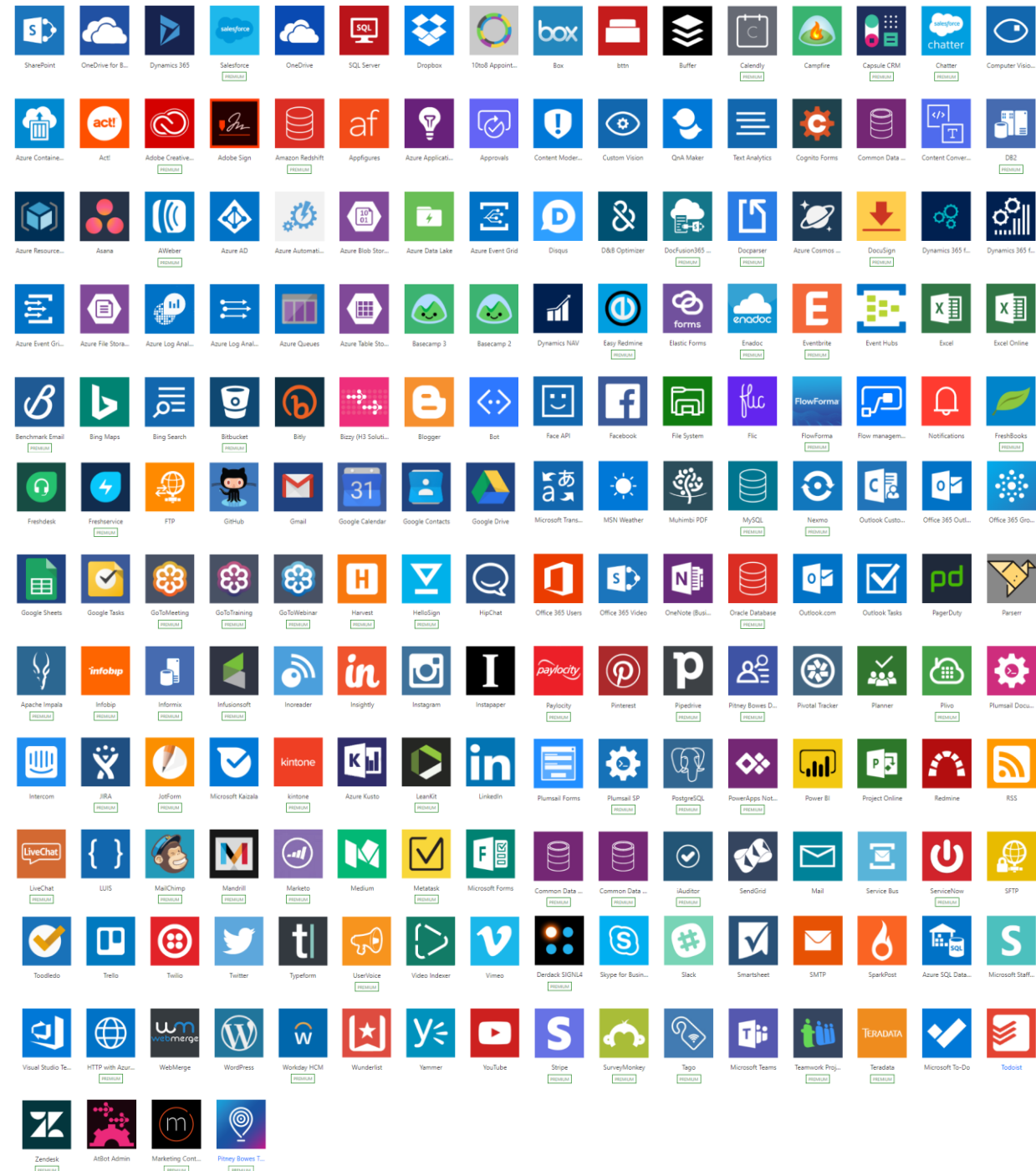
- Manual via button or Power Apps
- On a schedule
- On an event in the cloud

Actions—what the flow does
Uses data from the trigger

The screenshot displays a Power Automate flow configuration interface. At the top, a trigger card titled "When a record is created, updated or deleted" is shown with a database icon. It includes fields for "Trigger condition" (set to "Create or Update"), "The entity name" (set to "Accounts"), and "Scope" (set to "Organization"). A "Filtering attributes" field contains the text "Comma-separated list of attributes. The trigger fires if at least one of these". Below these fields is a "Hide advanced options" link. A downward arrow connects the trigger to an action card titled "Send an email notification (V3)" with an envelope icon. The action card has fields for "To" (set to "Owner (Value)"), "Subject" (set to "Account record change"), and "Email Body". The email body is formatted with a font size of 12, bold, italic, and underline options, and contains the text: "Dear Owner (Value), Your assigned account record Account Name has been changed. Please review the record at your convenience." A "Show advanced options" link is at the bottom of the action card.

Integration + Connectivity

- Built-in connectivity to 250+ SaaS cloud services, file providers, databases, web APIs, productivity apps, and more
- Connect to on-premises systems via Data Gateway
- Pluggable extensibility via Custom Connectors to integrate existing LOB systems into flow



Characteristics of automated flows

- ⚡ Starts with an event or trigger
- 📋 Performs any number of actions
- 🔗 Can have conditional logic
- 🔄 Can call other workflows



What can business process flows do?



Create stages or screens that enforce a certain sequence of steps



For each stage, collect data from the user and / or and kick off automated workflows



Create branching logic based on the data

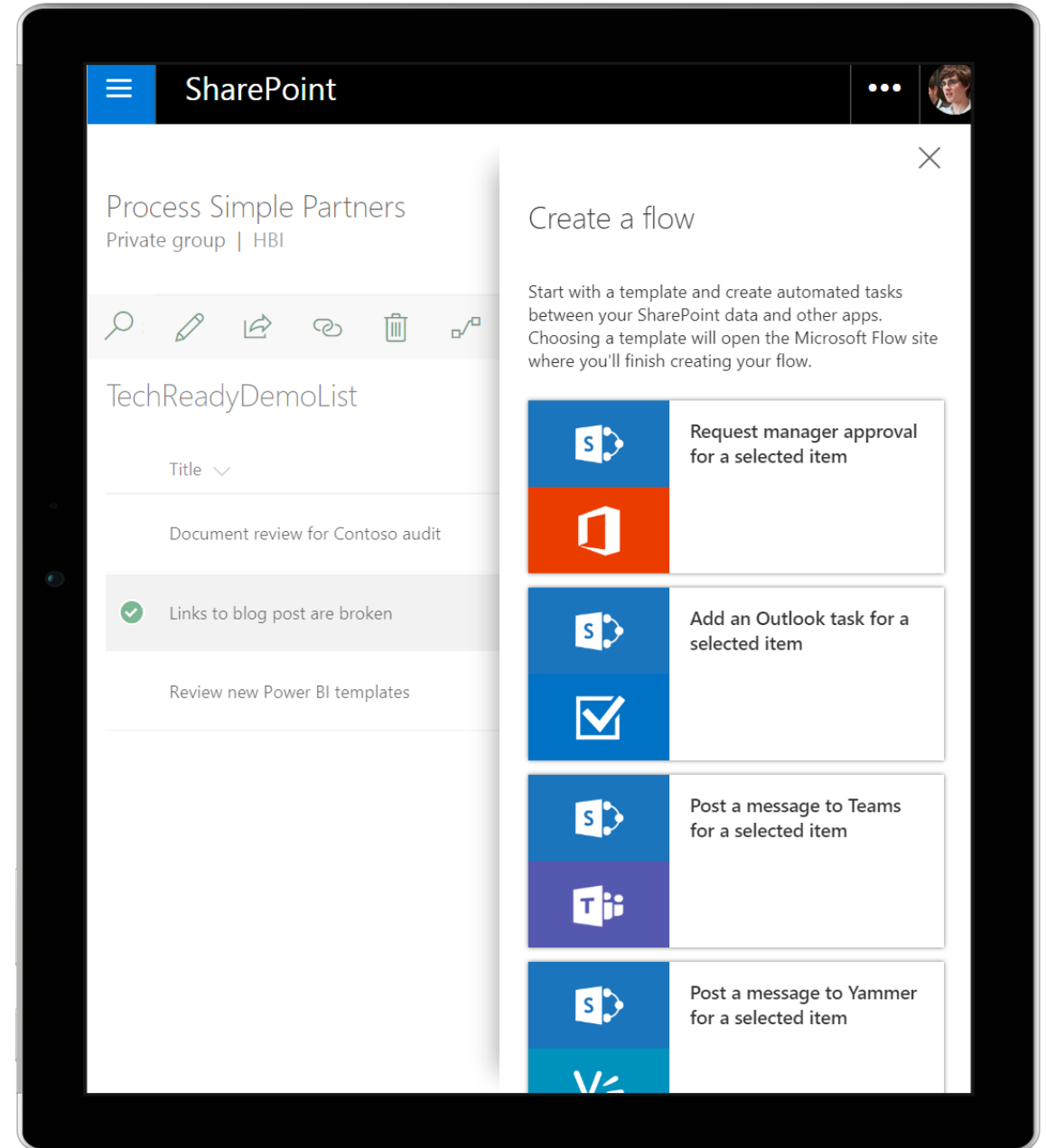


Flow & SharePoint & OneDrive

Flow button appears in all Modern Lists
and Document Libraries

There are two states for the button:

1. When you don't have a file selected
 - You can create flows that run in the background on that list
2. When you have a file selected
 - You can create manual flows that run on that specific file
 - All manual flows already tied to that document library appear on the menu when you open it



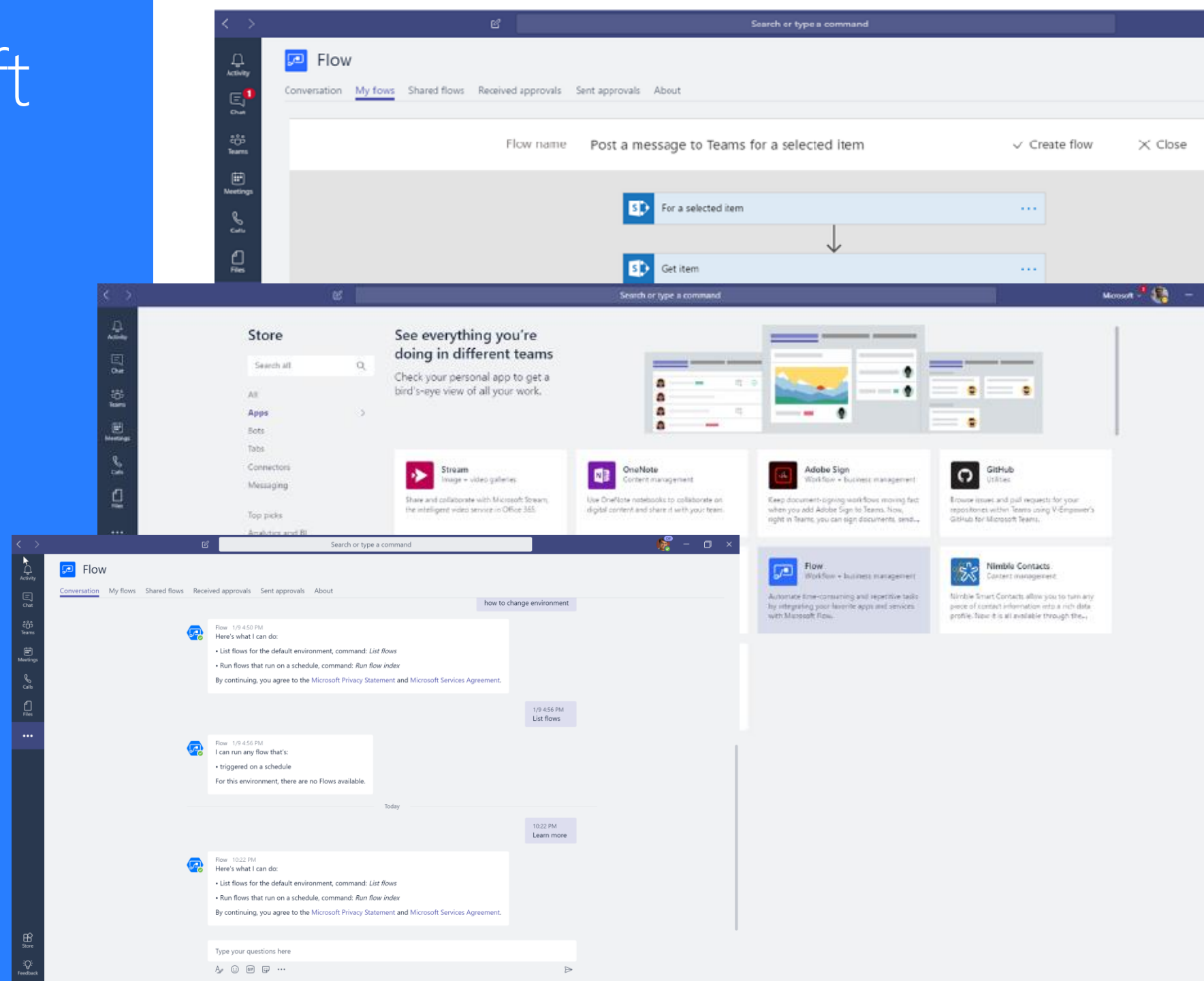
Flow & Microsoft Teams

Within Teams

- Access personal flows
- Create new flows
- Approvals center

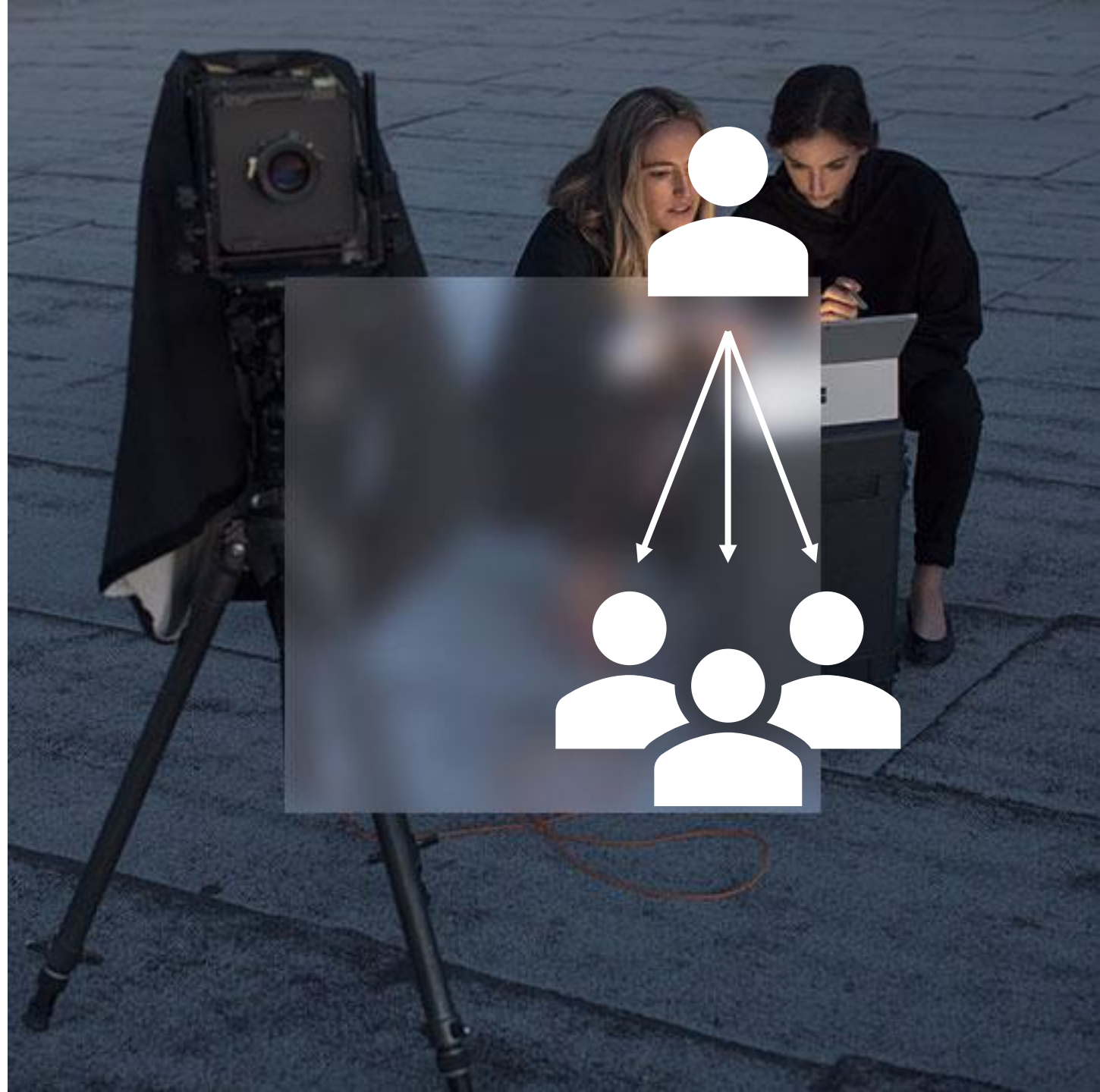
Use the flow bot to

- Trigger schedule based flows



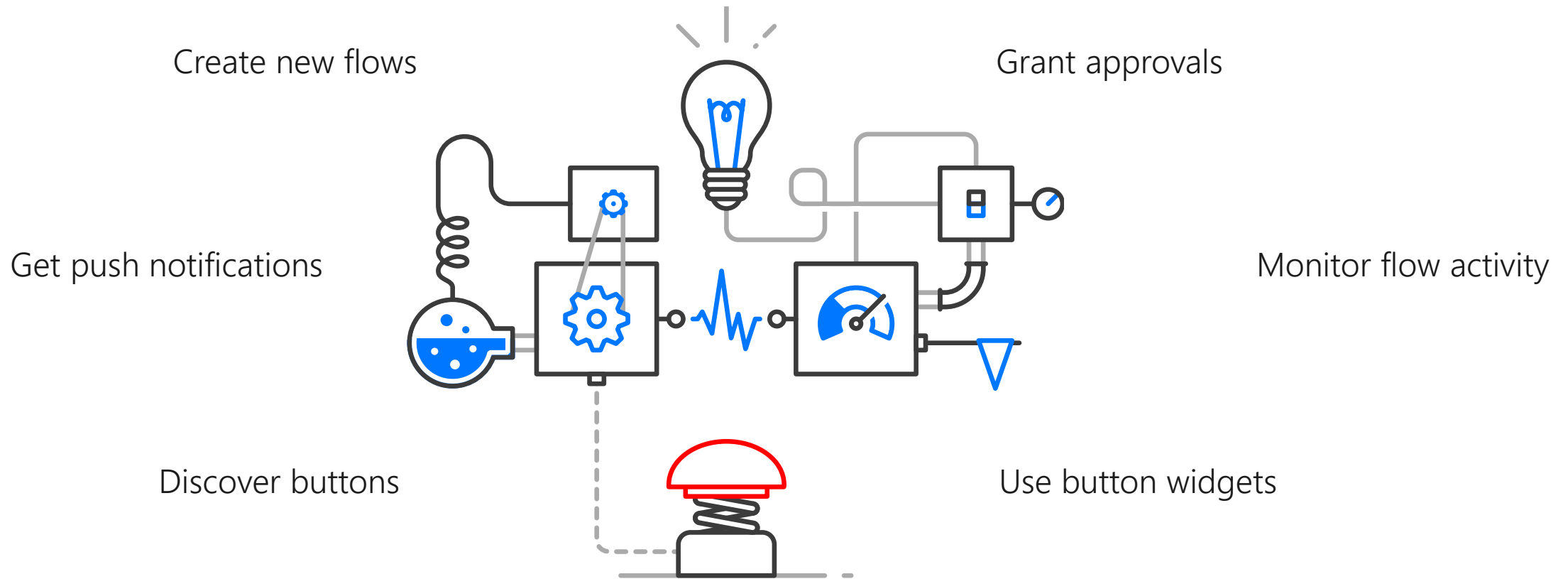
Flow sharing

- Many people can own a flow at once
- Use **buttons** to share the ability to *run* flows throughout your organization
- Use **approvals** for people to *participate* in a flow without knowing it's a flow



































Power Automate Mobile & Devices

Work less and do more, from anywhere



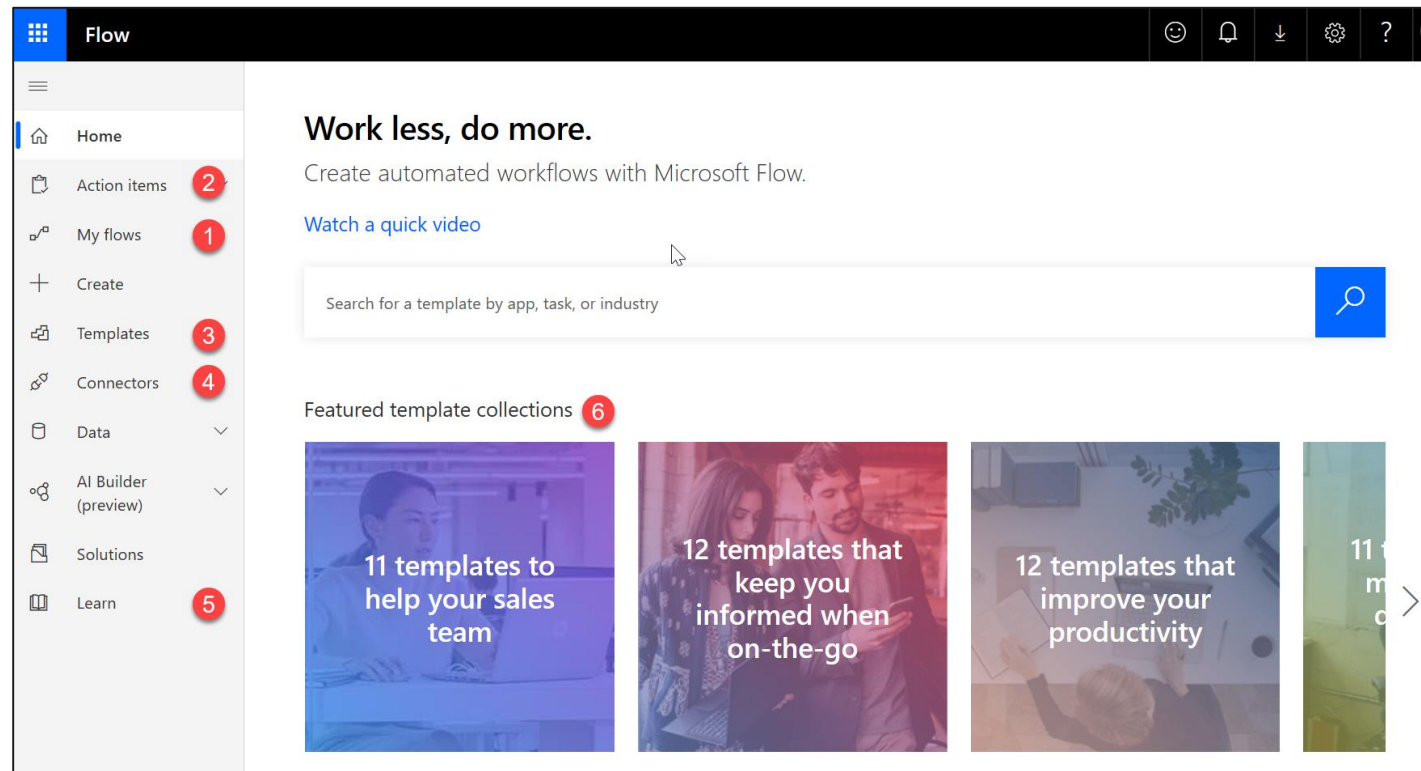
Create, run, and manage automated workflows between your favorite apps and services – even when you're on the go!

Templates help users to get started with Power Automate

 Create a flow from blank	 Copy Dynamics CRM Accounts to Common Data Service customer organizations By Microsoft Used 227 times	 Copy Dynamics CRM Accounts to customers in Dynamics 365 for Operations By Microsoft Used 197 times	 When an object is created in Dynamics CRM, create a list item By Microsoft Used 194 times	 Create Dynamics Leads based on Tweets with a button tap By Microsoft Used 31 times	 Add a Dynamics Case after email approval By Microsoft Used 31 times	 Copy new Dynamics CRM Cases to the Common Data Service By Microsoft Used 26 times	 Create a Wunderlist Task for New CRM Leads By James Turner Used 26 times
 When a new opportunity is created post to Yammer By Richard Bosse Used 133 times	 Create Dynamics CRM Leads from an Excel table By Microsoft Used 121 times	 Create Dynamics Leads based on Tweets By Microsoft Used 118 times	 Create a new record in Dynamics CRM when a new list item is added By Microsoft Used 95 times	 Send an mail from your SMTP server on new opportunities By Kerem Eser Used 26 times	 Copy new Dynamics CRM Leads to the Common Data Service By Microsoft Used 25 times	 Attach OneDrive files about Dynamics Contacts as notes By Microsoft	 Create CRM Account for new Azure Queue Messages By Marius Pedersen
 Copy new Dynamics CRM Contacts to the Common Data Service By Microsoft Used 91 times	 Create a SharePoint item based on a Dynamics CRM record By Henry Scheinin Used 79 times	 Create Dynamics notes for Emails By Microsoft Used 61 times	 Move rows from and Excel table to Dynamics AX Online Vendors By Microsoft Used 56 times	 Send a Push Notification for new Sales Orders By Isaac Dorgbefe	 Copy Teams from the Common Data Service to Operations Customer Groups By Michael Berroth	 Copy Salesforce Accounts to Dynamics AX Online Customers By Microsoft	 When a new lead is created in Dynamics CRM, add it to a Smartsheet By Microsoft
 Copy from Dynamics CRM to the Common Data Service and Operations By Microsoft	 CRM Opportunity Win to Create a New Project By Microsoft	 Create Dynamics CRM Leads from a Google Sheet By Microsoft	 On approval create a Dynamics CRM entity for items in a SharePoint list By Microsoft	 Create a case in Dynamics from Freshdesk By Microsoft	 Low stock warning By Microsoft	 Social Media Promotions By Microsoft	 Add notes to a Dynamics CRM contact By Microsoft

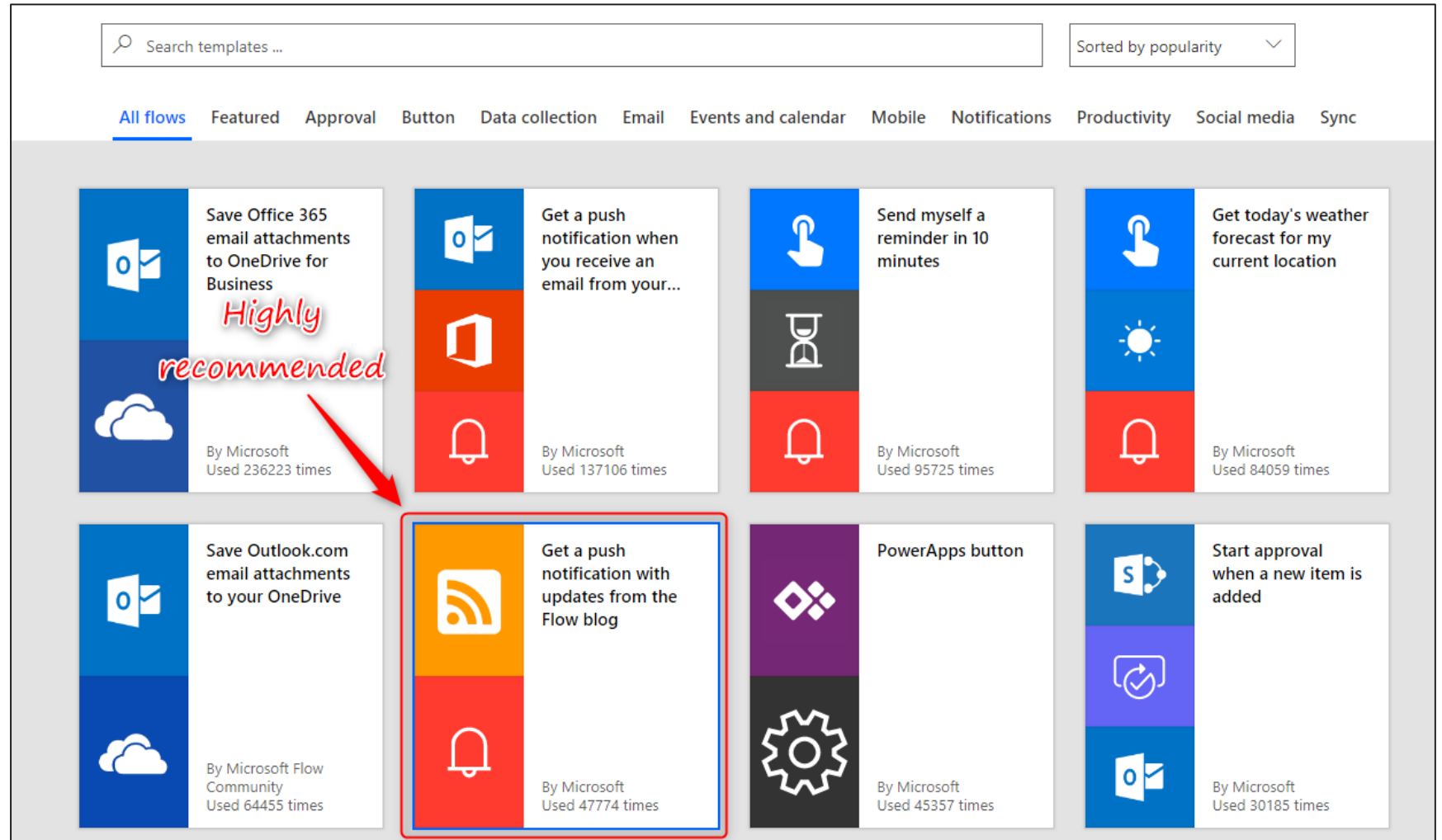
Power Automate Portal [\[https://flow.microsoft.com\]](https://flow.microsoft.com)

1. **My flows**, where your flows live.
2. **Approvals**, where you can automate and streamline your approval process.
3. **Templates**, which is a great place to start.
4. **Connectors**, where you can connect from one service to another.
5. **Learn**, where you can gain information that will help you ramp up quickly on Power Automate.
6. **Featured template collections**, collections of templates by industry or role



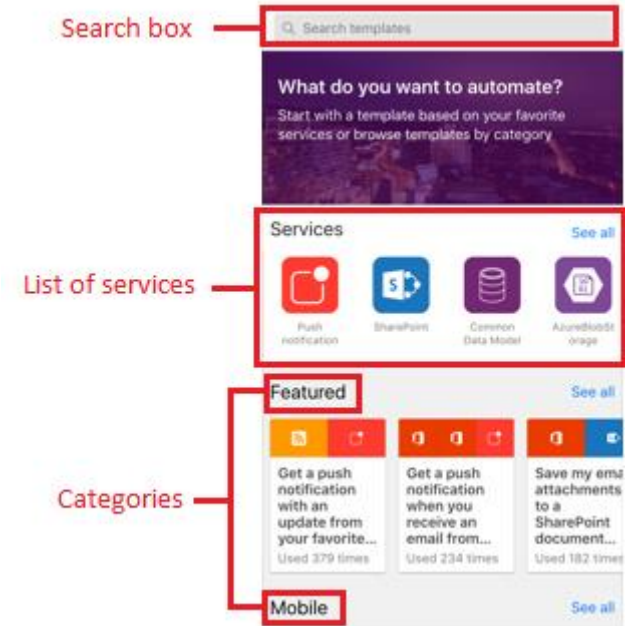
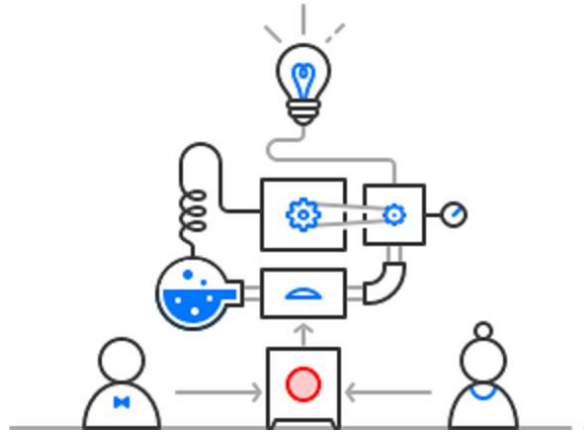
Power Automate templates

Highly recommend running the “Get a push notification with updates from the flow blog” template



Power Automate mobile app

- Get notifications
- Manage approvals
- See flow details
- See flow run activity
- Flow buttons



Go to the app store on your device and search for "Microsoft Flow"



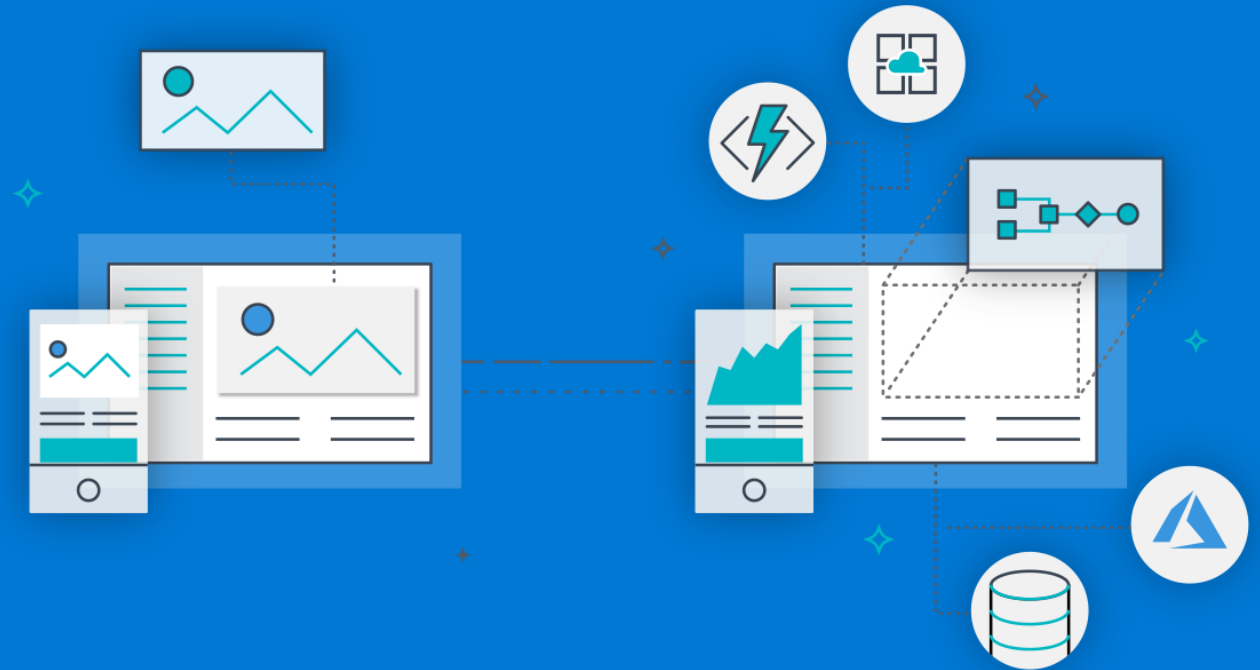
Apple Store: <https://itunes.apple.com/us/app/microsoft-flow/id1094928825?mt=8>

Google Play: <https://play.google.com/store/apps/details?id=com.microsoft.flow>

Windows Store: <https://aka.ms/flowmobiledownloadwp>

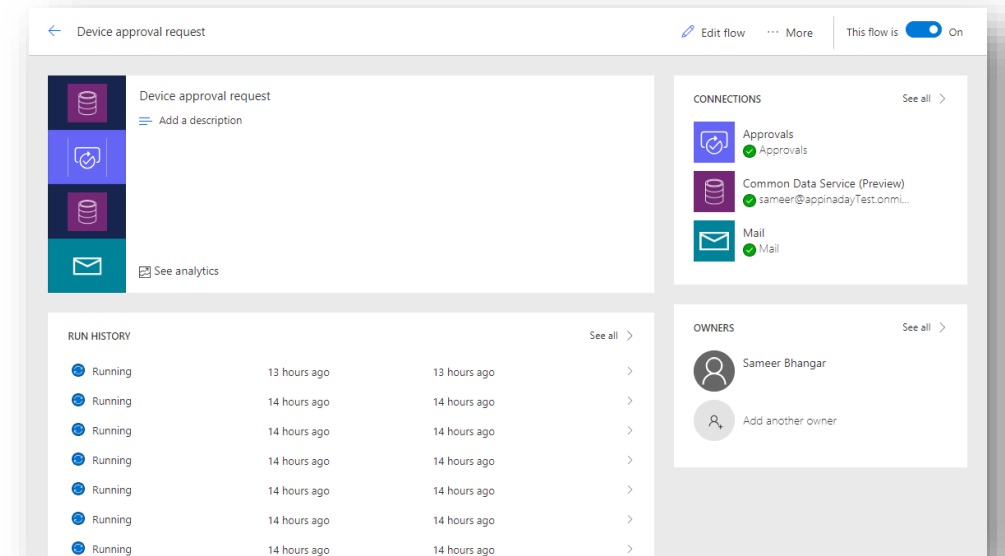
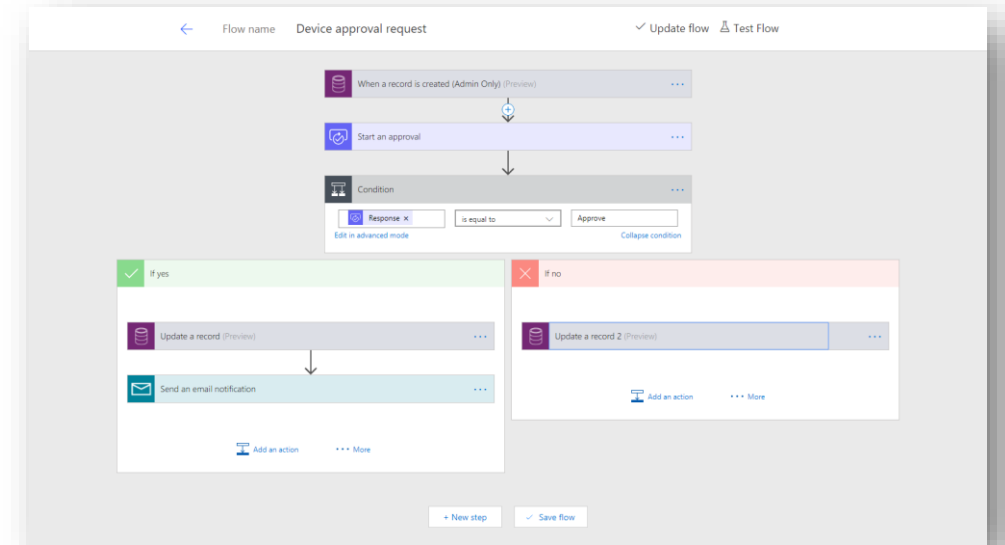
Hands-on-lab

Module 4: Power Automate



Lab objectives

- Trigger a flow when a new record is created in CDS
- Send an approval request
- Conditional branching based on the approval response
- Send email notifications
- Update the CDS record with the approval status and the approver's comments
- Use the approval center on web and mobile
- Check the status of flow runs





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