



Power Platform

App in a Day

Module 4: Power Automate

Hands-on Lab Step-by-Step

August 2022

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Power Automate

Lab Prerequisites

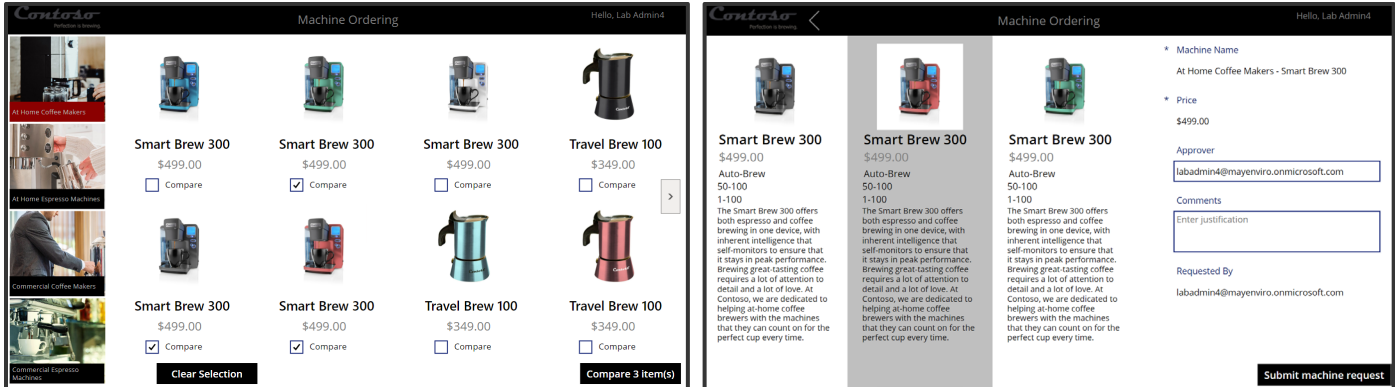
This is the fourth lab in a series covering Power Apps, Microsoft Dataverse, and Power Automate. The assumption is that you have successfully completed the first three modules, or at least the initial part of setting up an environment as described in the overview – **“00-AppInADay Lab Overview.pdf”**.

If you have not completed the previous modules, you can use the partially completed version of the lab package in the “\Completed\Module3” folder. Follow the instructions in the document “Importing Module 3 Completed” before proceeding with this module, which will provision the app and the Microsoft Dataverse table into your environment.

Integrating a Power Apps App with Power Automate

In this lab, you will create a flow that uses the Modern Approvals service to automate the approval workflow – it will send an email to the selected approver and take an action based on their response.

You should already have an app with these two screens:



Exercise 1: Create Approval Request Flow

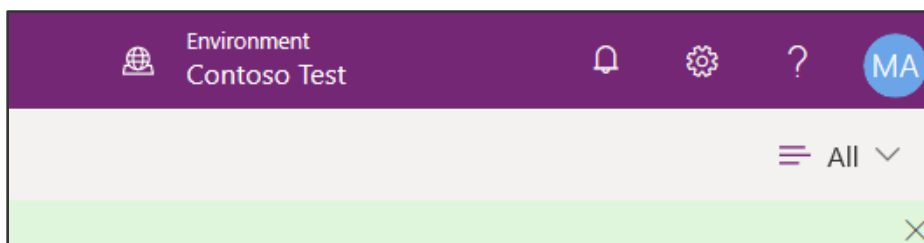
The flow will trigger when a new item is added to the **Machine Order** table in Microsoft Dataverse.

- It will use the Approvals Service to send an approval request.
- The approver will receive an email with options to Approve or Rejects and add comments.
- Once the approver responds, the record in the Machine Order table will be updated with the appropriate approval status and comments.
- An email will be sent to the requester informing them whether the machine was approved or rejected.

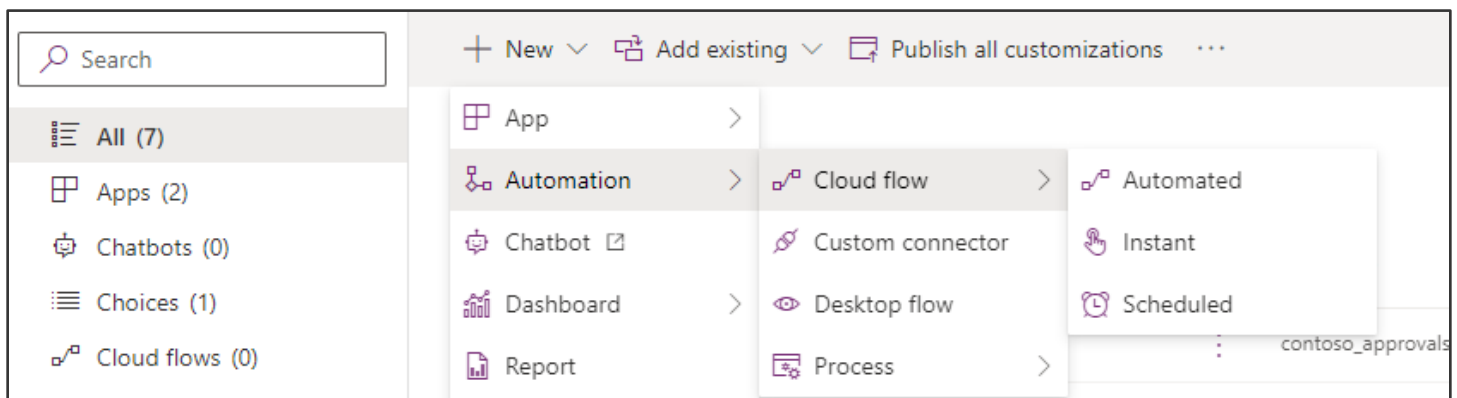
There are two ways to create a flow – from blank or from a template. In this lab, we will create the approval flow starting with a blank flow.

Task 1: Login on Power Apps website and create a flow

1. Navigate to [Make Power Apps](#) and make sure you are in the correct environment.



2. Select **Solutions** and click to open the **Contoso Coffee** solution.
3. Click **+ New** and select **Automation | Cloud flow | Automated**.



Task 2: Configure the trigger

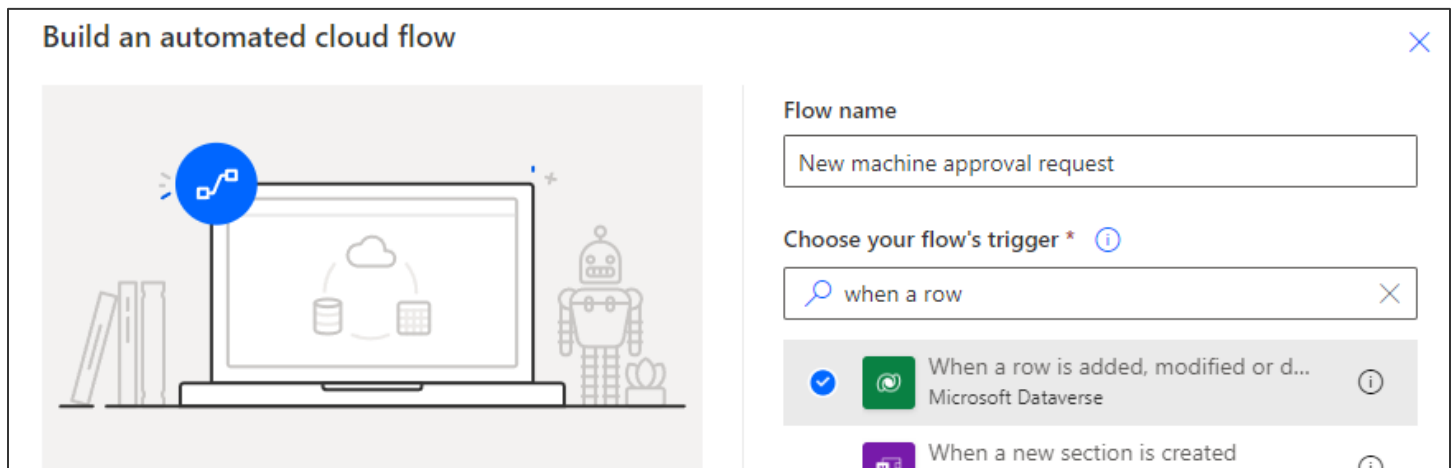
The first thing you will need to configure is the trigger, i.e., when should this flow run. A flow can be triggered:

- a. manually from a Power Apps app,
- b. manually from a flow button,
- c. on a fixed schedule, or

- d. when an event occurs, such as a new item being added to a table, a new email arriving in a user's inbox, a new tweet being posted that meets certain conditions, etc.

In this scenario, we will configure the flow to trigger when a **new item is added** to the **Machine Order** table in **Microsoft Dataverse**

1. **Enter a name** for your flow, such as – **"New machine approval request"**
2. In the **Choose your flow's trigger** box, search for when a row is added and select **When a row is added modified, or deleted**.



Build an automated cloud flow

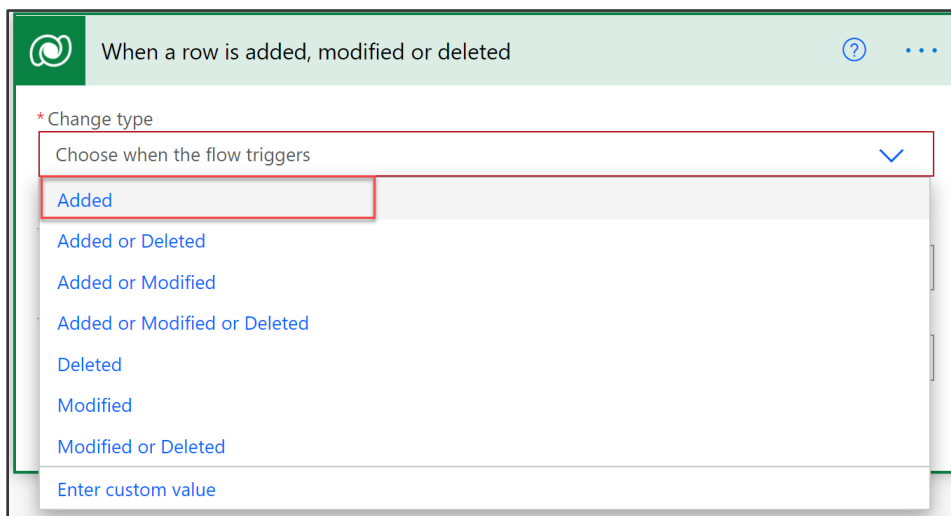
Flow name
New machine approval request

Choose your flow's trigger * ⓘ
when a row

✓ When a row is added, modified or d...
Microsoft Dataverse ⓘ

When a new section is created ⓘ

3. Click **Create**.
4. Select **Added** for Change type



When a row is added, modified or deleted

* Change type
Choose when the flow triggers

Added

Added or Deleted

Added or Modified

Added or Modified or Deleted

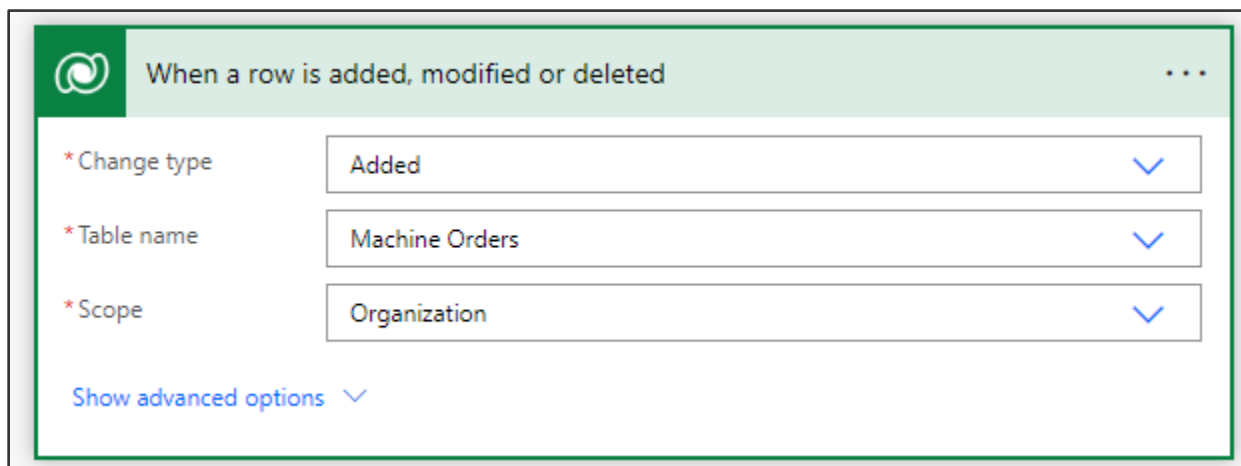
Deleted

Modified

Modified or Deleted

Enter custom value

5. Click the **Table Name** drop-down and select **Machine Orders**. You can type "machine orders" to search for it.
6. Click the **Scope** drop-down and select **Organization**. Scope allows you to limit when your flow will run, for example you could choose User and it would only run for orders you create. In this case you are choosing organization because you want this flow to run for records created by anyone in your entire organization.



When a row is added, modified or deleted

* Change type: Added

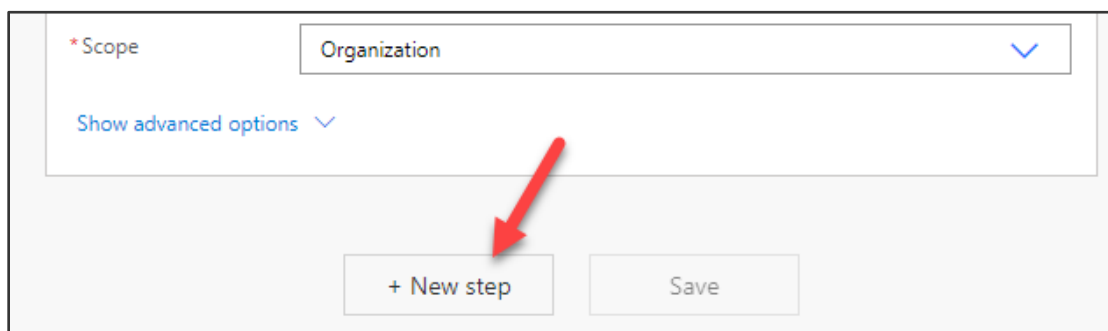
* Table name: Machine Orders

* Scope: Organization

Show advanced options

Task 3: Add action to send an approval request

1. Click **+ New step**.



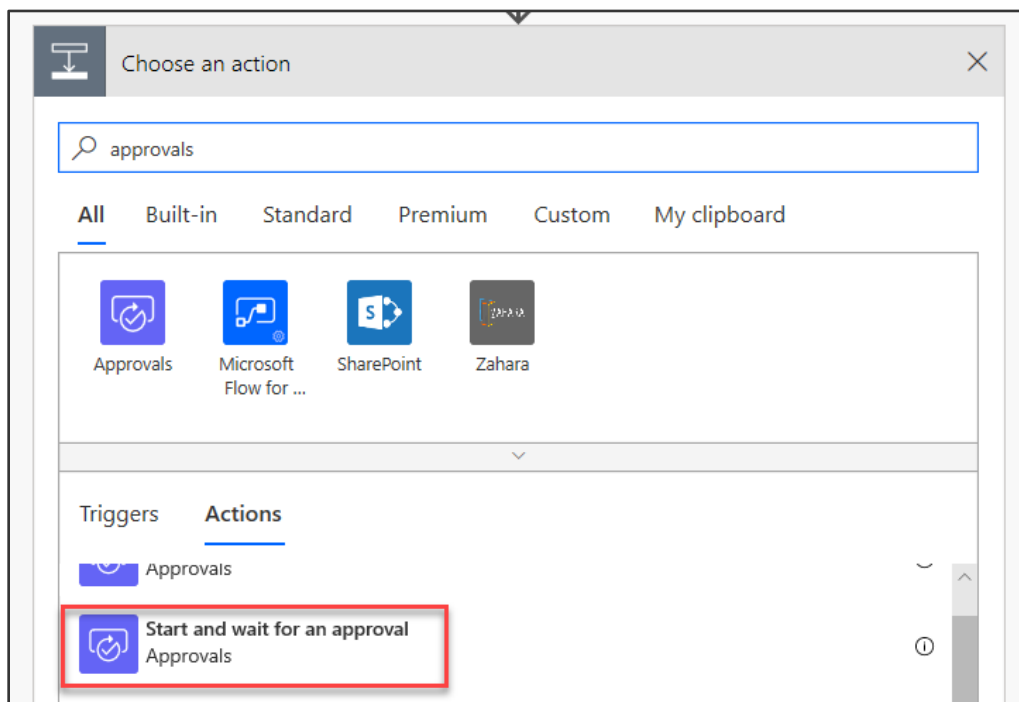
* Scope: Organization

Show advanced options

+ New step

Save

2. Search for **Approvals** and select **Start and wait for an approval**.



Choose an action

approvals

All Built-in Standard Premium Custom My clipboard

Approvals Microsoft Flow for ... SharePoint Zahara

Triggers Actions

Approvals

Start and wait for an approval Approvals

This will use the approval service. For more information see [Get started with approvals](#).

3. In the **Approval type** dropdown select **Approve/Reject - First to Respond**.

4. For the Title, we will add some text and one variable. This variable will contain the Machine Name of the machine order request. Enter **New machine request for** in the **Title** text box.
5. Select **Machine Name** for the **Dynamic content**.

Note: if the Dynamic content box is not visible, click the Add dynamic content button - 

6. Select the **Assigned to** field, select click **Approver**. Click on the **Add dynamic content** button to show/hide the dynamic content pane.

Start and wait for an approval

* Approval type: Approve/Reject - First to respond

* Title: New machine request for Machine Name

* Assigned to: Approver

Details: Markdown supported (see <https://aka.ms/approvaldetails>)

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Show advanced options

+ New step Save

Add dynamic content from the apps and connectors used in this flow.

Dynamic content Expression

approver

When a row is added, modified or deleted

Approved Date

Approver

Note: Recall from the earlier lab that this will be the approver's email address.

7. Click **Show Advanced Options**.

* Assigned to: Approver

Details: Markdown supported (see <https://aka.ms/approvaldetails>)

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Show advanced options

8. Select the **Requestor** field and select **Requested By**

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Requestor: Requested By

Enable notifications: Yes

Enable reassignment: Yes

Attachments Name - 1: Attachment name

Attachments Content - 1: Attachment content

+ Add new item

Hide advanced options

Add dynamic content from the apps and connectors used in this flow.

Dynamic content Expression

requested

When a row is added, modified or deleted

Request Date

Requested By

9. In the **Details** field, type **A new machine has been requested** and hit <Enter>.
10. Select **Machine Name** from the Dynamic content pane.

The screenshot shows a Power App form with the following fields:

- Assigned to:** Approver x ;
- Details:** A new machine has been requested
Machine Name x
- Item link:** Add a link to the item to approve
- Item link description:** Describe the link to the item
- Requestor:** Requested By x ;
- Enable notifications:** Yes
- Enable reassignment:** Yes
- Attachments Name - 1:** Attachment name

The dynamic content pane on the right shows the search results for 'Machine Name'.

11. Type , \$ and select **Price**. You may need to click the "See More" option under the dynamic content search bar in order to see the Price option.

The screenshot shows the Power App form with the 'Details' field updated to: A new machine has been requested
Machine Name x , \$ Price x

The dynamic content pane on the right shows the search results for 'price'.

12. Hit Enter and type **Department Contribution: \$**
13. Select **Department Contribution**.

The screenshot shows the Power App form with the 'Details' field updated to: A new machine has been requested
Machine Name x , \$ Price x
Department Contribution: \$ Department C... x

The dynamic content pane on the right shows the search results for 'depa'.

14. Hit Enter, type **Comments:** and select **Comments**.

Details

A new machine has been requested

Machine Name x , Price x

Department Contribution: \$ Department C... x

Comments: Comments x

Add dynamic content +

Item link

Add a link to the item to approve

Item link description

Describe the link to the item

Requestor

Requested By x ;

Enable notifications

Yes

Enable reassignment

Yes

Attachments Name - 1

Attachment name

Add dynamic content from the apps and connectors used in this flow. Hide

Dynamic content Expression

comm

When a row is added, modified or deleted

(Deprecated) Traversed Path
A comma separated list of string values representing the uni...

Comments

15. Your **Flow** will now look like the image below.

When a row is added, modified or deleted

* Change type

Added

* Table name

Machine Orders

* Scope

Organization

Show advanced options

Start and wait for an approval

* Approval type

Approve/Reject - First to respond

* Title

New machine request for Machine Name x

* Assigned to

Approver x ;

Details

A new machine has been requested

Machine Name x , Price x

Department Contribution: \$ Department C... x

Comments: Comments x

Item link

Add a link to the item to approve

Item link description

Describe the link to the item

Requestor

Requested By x ;

Enable notifications

Yes

16. **Save** your flow

Note: When creating your own approval flows, you may additionally include a clickable link that will be displayed in the approval email. In this scenario, for example, you could include a link to view machine details in an online catalogue. You would include the **Item link** and **Item link description**.

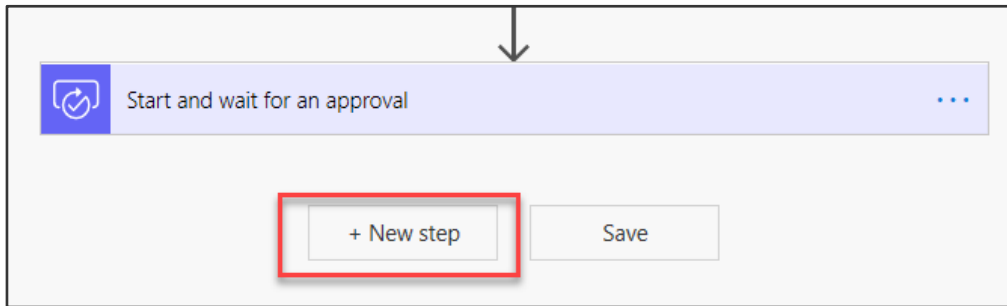
Note: You could also set the **Item link** to deep link into a Power Apps app to view more details about the request. In this scenario, you might pass an `OrderID` or a `MachineID` as a URL parameter. Power Apps accepts URL parameters.

Exercise 2: Conditional Logic

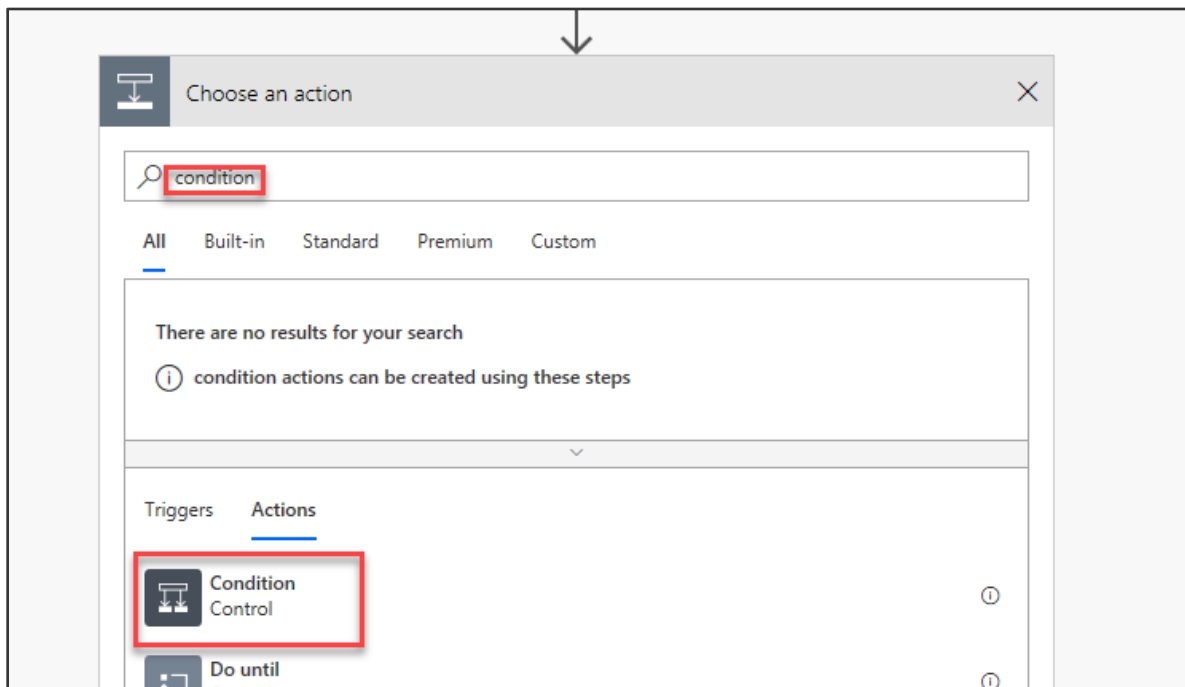
In flow, you can add conditions to take different actions depending on a certain result, in this case, whether the request was approved or rejected.

Task 1: Add conditional logic to flow

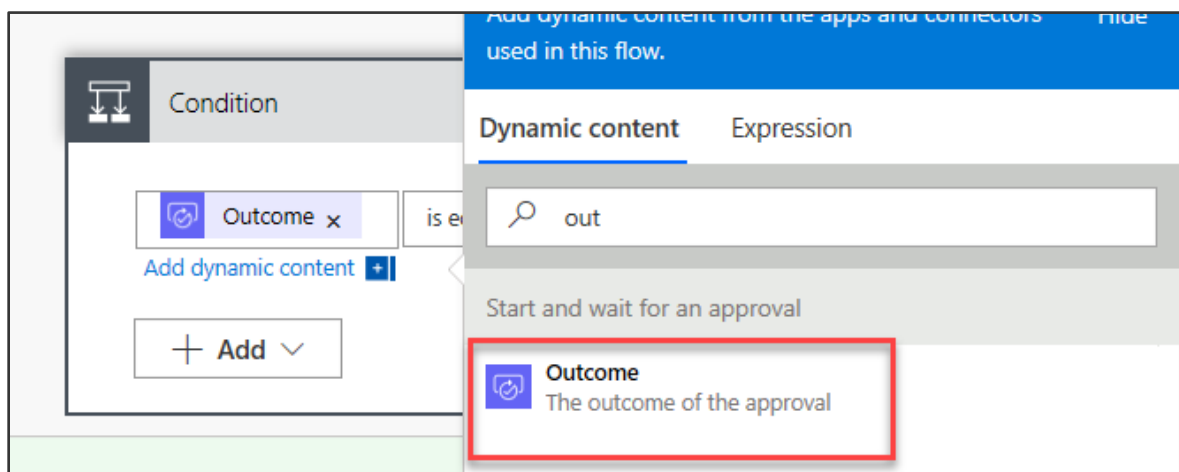
1. Click **+ New step**.



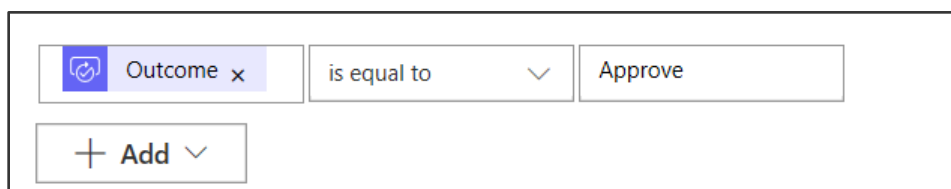
2. Search for **Condition** and select it.



3. Click in the left edit box that says, "Choose a value" and select **Outcome** from the dynamic content pane. You may need to press the "+" icon below the edit box to hide the dynamic content pane.



4. Select **is equal to** for condition and type **Approve** for **Value**.



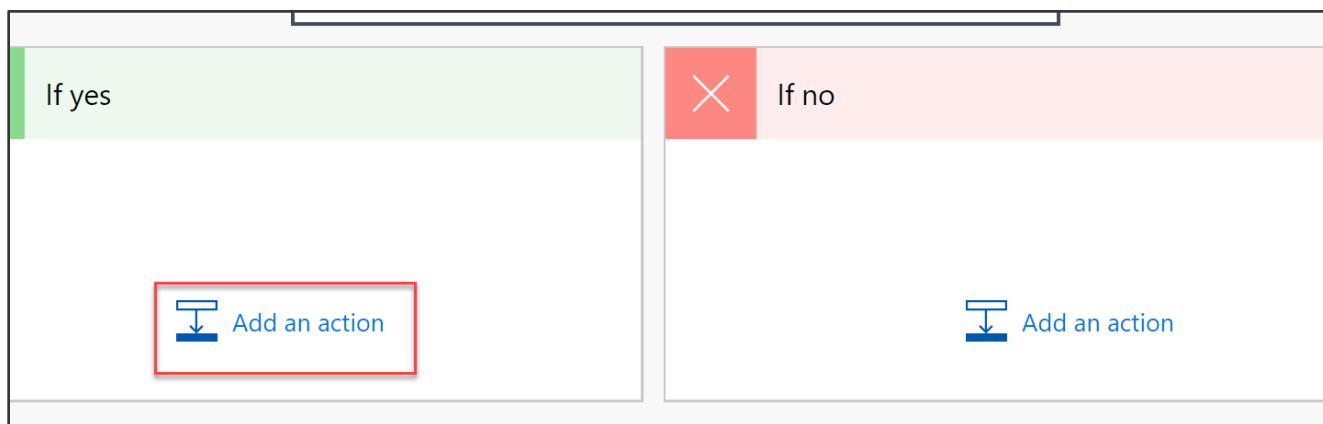
Task 2: Add conditional logic to flow

We will now configure what actions to perform if the response is approved or not – YES branch vs. NO branch.

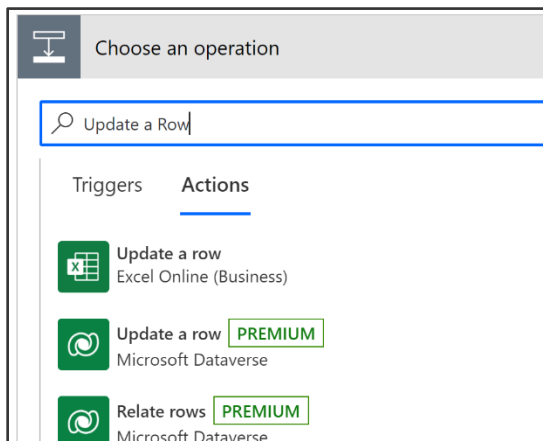
We will add two actions:

- a. Update the record in the Machine Order table
- b. Send an email to the employee who requested the machine

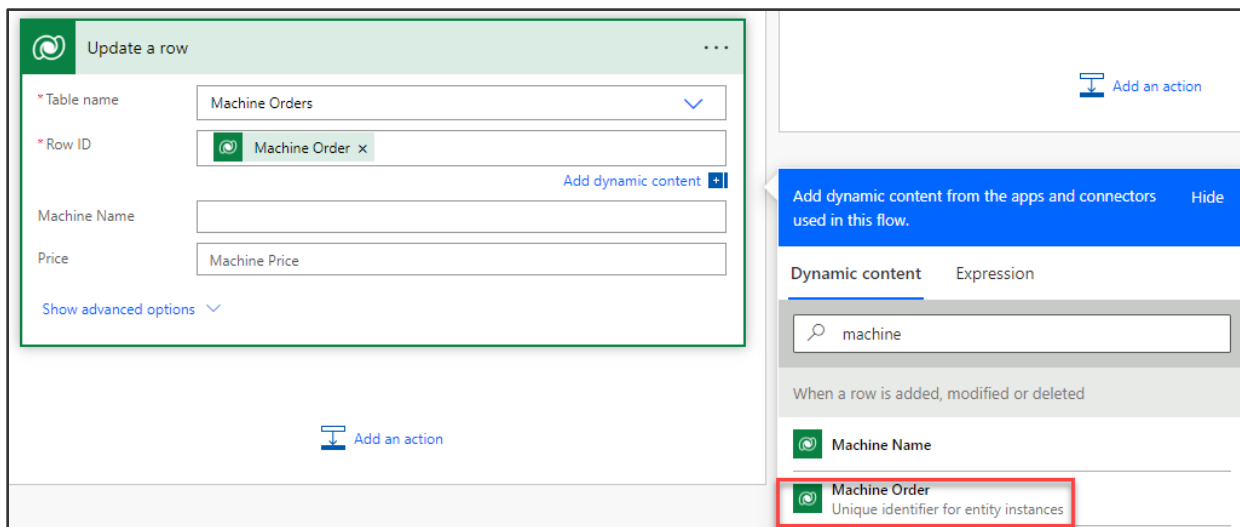
1. In the left **If yes** box, click **Add an action**



2. Search for **Update a Row** and select **Update a Row Microsoft Dataverse**

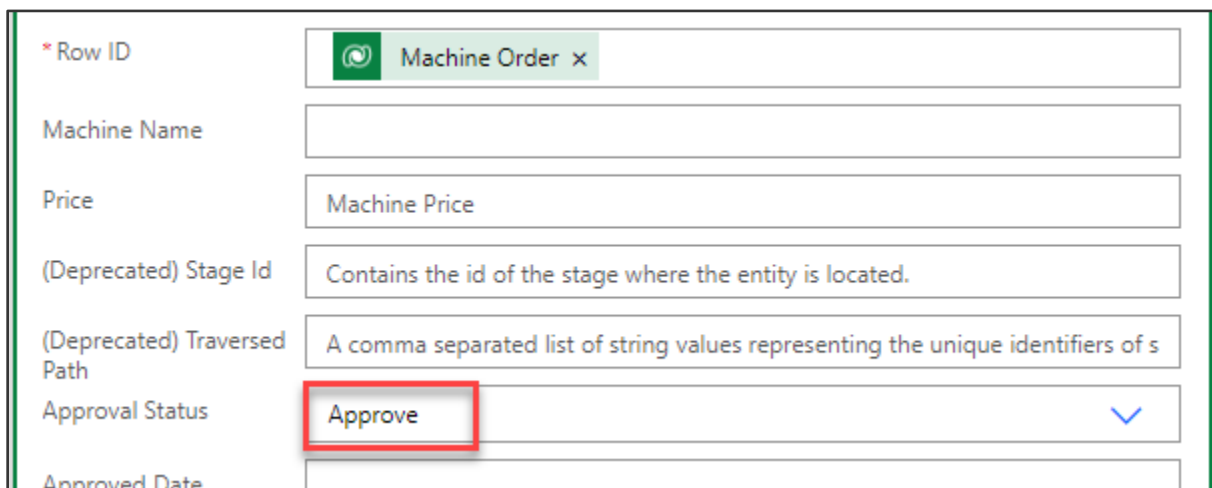


3. Select **Machine Orders** for **Table Name**.
4. Click on the **Row ID** and select Machine Order from the Dynamic content pane.

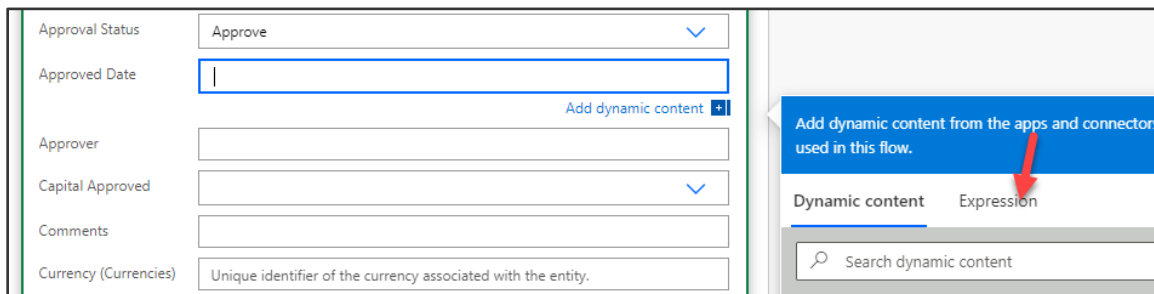


This is the unique lookup ID for the record (or row) that was created.

5. Click **Show advanced options**.
6. Select **Approve** from the **Approval Status** drop-down.



7. Select the **Approved Date** field and select the **Expression** tab.



The screenshot shows a form with fields: Approval Status (set to 'Approve'), Approved Date (empty), Approver, Capital Approved (set to 'v'), Comments, and Currency (Currencies) (set to 'Unique identifier of the currency associated with the entity.'). The right-hand pane is open to the 'Expression' tab, showing a search bar and a list of dynamic content. A red arrow points to the 'Expression' tab.

8. Type **utcNow()** and click **OK**.



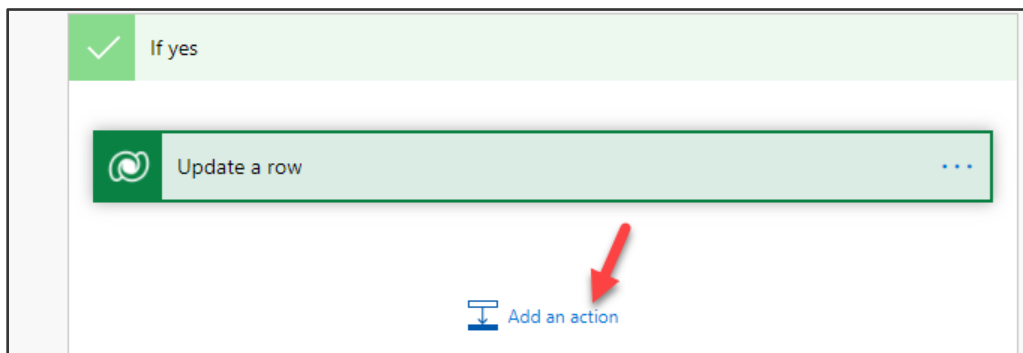
The screenshot shows the 'Approved Date' field with 'utcNow()' entered. The right-hand pane shows the 'String functions' section with 'utcNow()' selected and the 'OK' button highlighted. A red arrow points to the 'OK' button.

9. Save the flow.

Task 3: Add another action

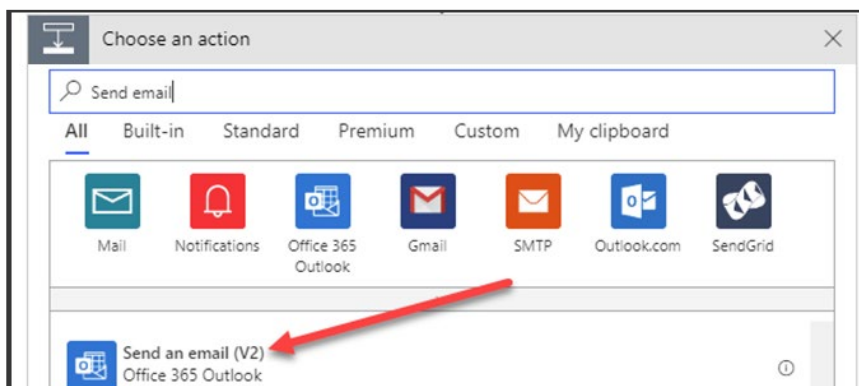
You will now add the send email action to the If Yes branch.

1. From within the yes branch, Click **Add an Action**.



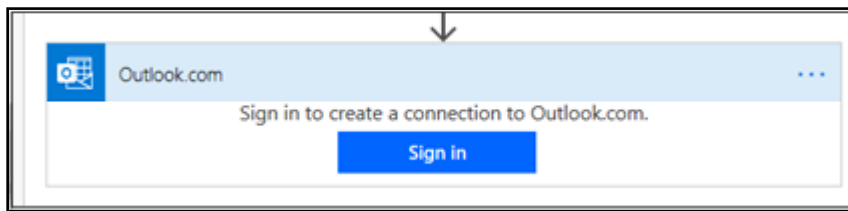
The screenshot shows a flow with an 'If yes' branch. Inside the branch is an 'Update a row' action. Below the branch, the 'Add an action' button is highlighted with a red arrow.

1. Search for **send email** and select **Send an email (V2) – Office 365 Outlook**.

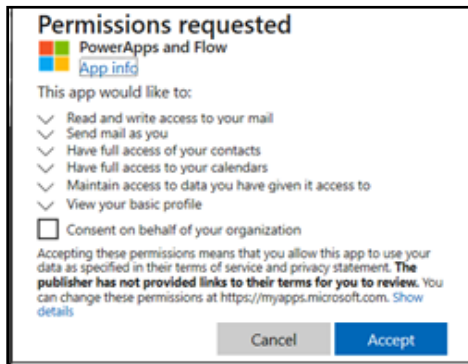


The screenshot shows the 'Choose an action' dialog box. The search bar contains 'Send email'. The results are categorized by 'All', 'Built-in', 'Standard', 'Premium', 'Custom', and 'My clipboard'. Under the 'All' category, the 'Send an email (V2) – Office 365 Outlook' action is highlighted with a red arrow.

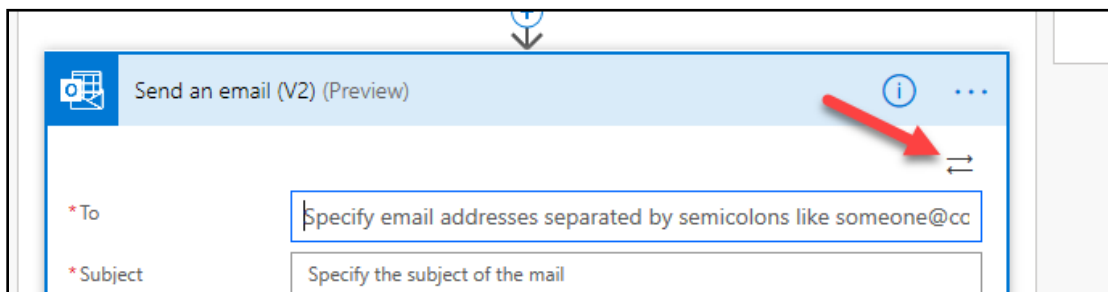
2. Click **Sign in** if prompted.



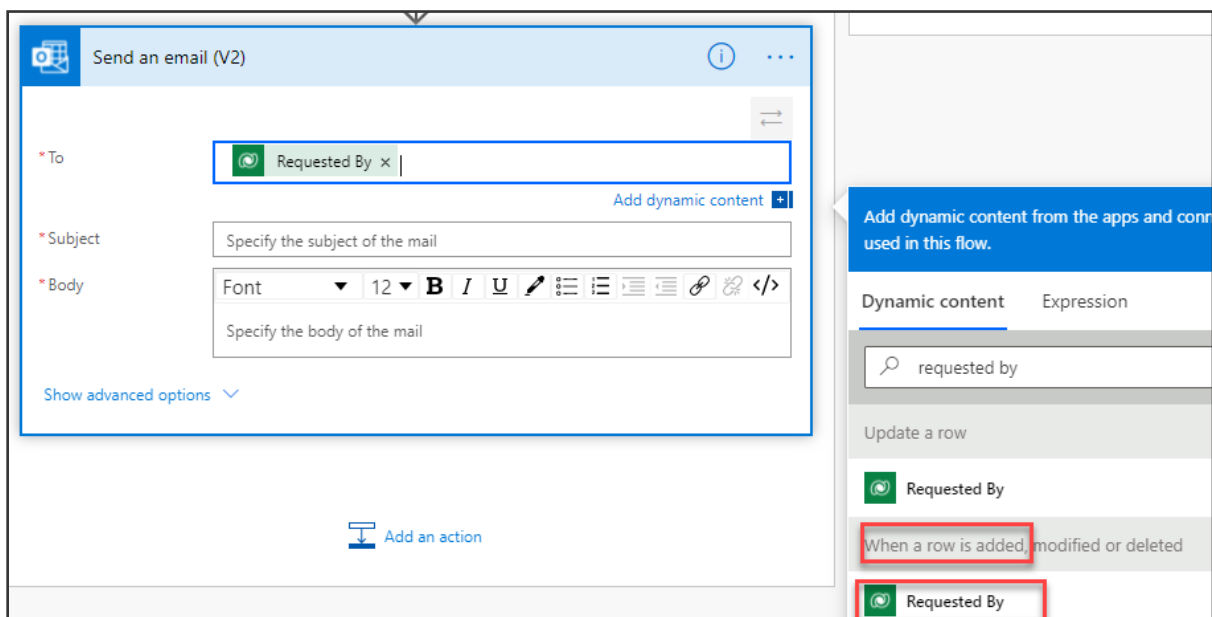
3. Click **Accept**.



4. Click on the **To** field and click **Switch to Advanced Mode**.

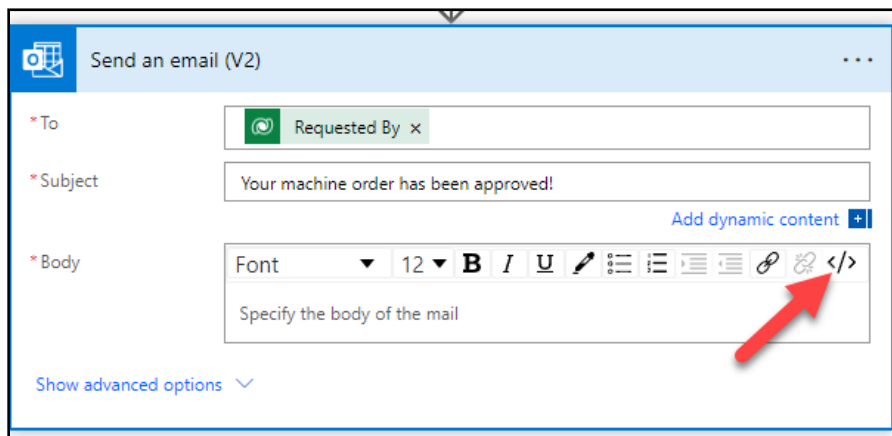


5. Select **Requested By** for **To**. Select from under the **When a record is added** action.



6. Type ***Your machine order has been approved!*** for **Subject**.

- Click on the **Code View** button.



Send an email (V2)

* To: Requested By x

* Subject: Your machine order has been approved!

* Body: Font 12 B I U Specify the body of the mail

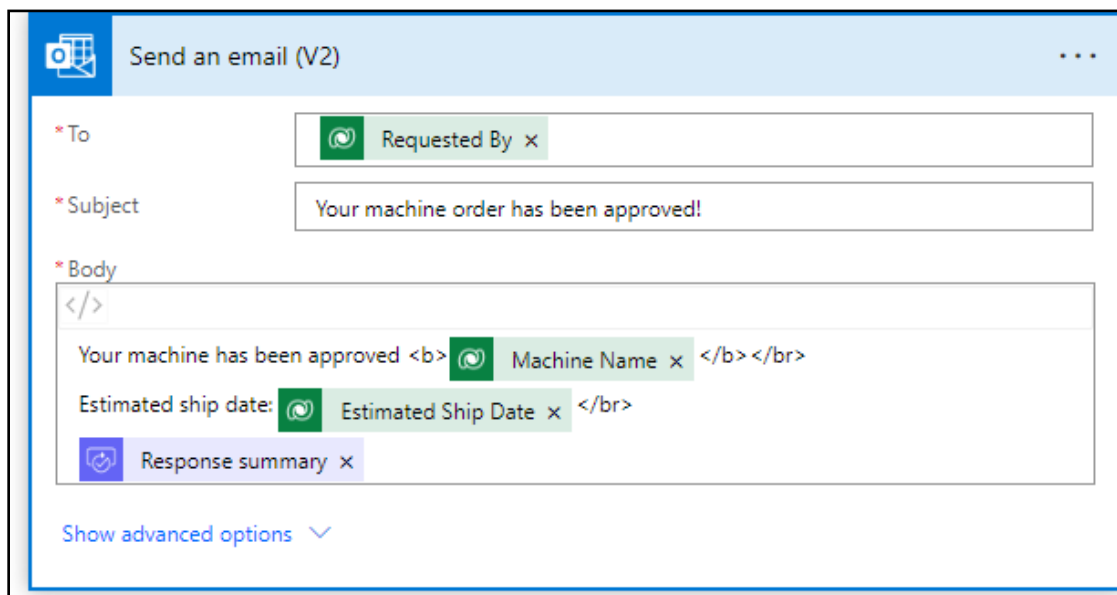
Add dynamic content +

Show advanced options v

- Set the **Body** value as shown below:

```
Your machine has been approved  
<b>@{outputs('Update_a_row')?['body/contoso_machinename']}</b></br>  
Estimated ship date: @{outputs('Update_a_row')?['body/contoso_estimatedshipdate']}</br>  
@{outputs('Start_and_wait_for_an_approval')?['body/responseSummary']}
```

Select **Machine Name** and **Estimated Ship Date** from the **When a record is added** action.



Send an email (V2)

* To: Requested By x

* Subject: Your machine order has been approved!

* Body: </>
Your machine has been approved Machine Name x </br>
Estimated ship date: Estimated Ship Date x </br>
Response summary x

Show advanced options v

Note: If you do not have an Office 365 mailbox setup, you can use one of the other connectors to send the email, such as Outlook.com, Gmail or SendGrid.

- Click **Save**.

Exercise 3: Test the cloud flow

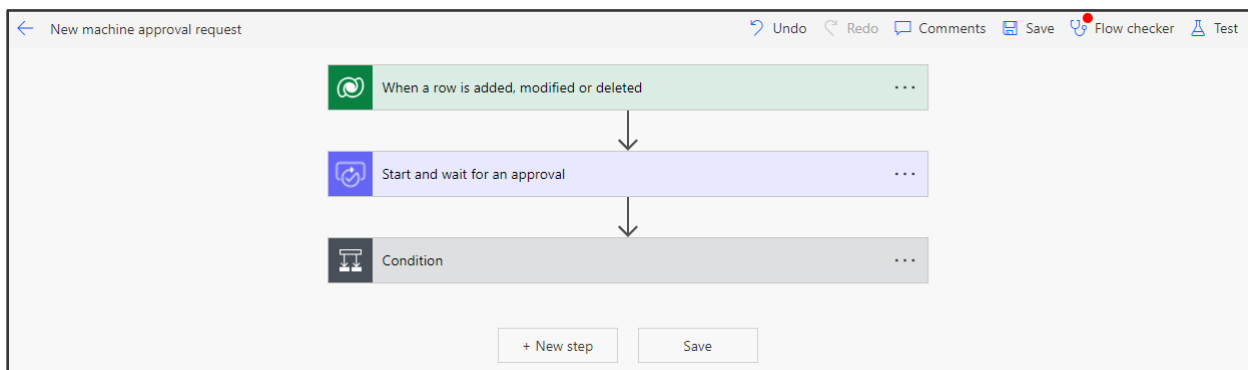
To test the flow, you will:

- Run the Machine Ordering app and submit an approval request
- Verify the request was sent to the approver
- Approve the request
- Verify that the Microsoft Dataverse record was updated, and an email was sent back to the requestor

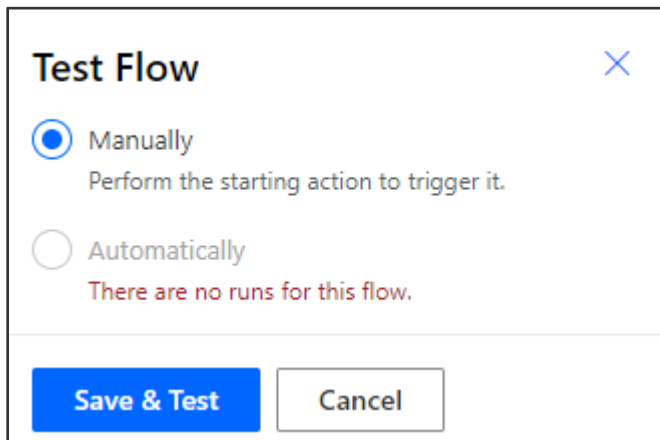
Task 1: Test the cloud flow

Note: When a new machine record is added to the Machine Order table in Microsoft Dataverse, it may take up to ten minutes for the flow to trigger. To ensure the flow runs immediately, select the **Test** option in the top right and select the **“Manually”** option. Then go ahead and submit a machine request. The flow should run immediately.

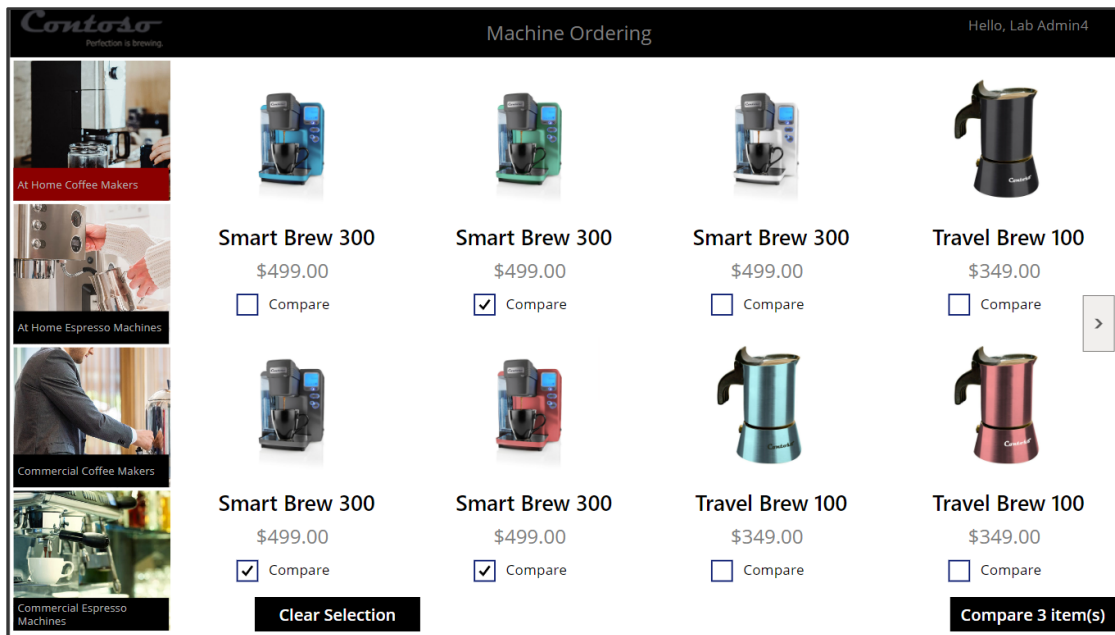
Note: You may see a warning in the Flow checker that the Power Automate Approvals has not been installed for your environment. Run the flow to initiate provisioning the Power Automate Approvals.



1. Select **Manually** and click **Save & Test**.



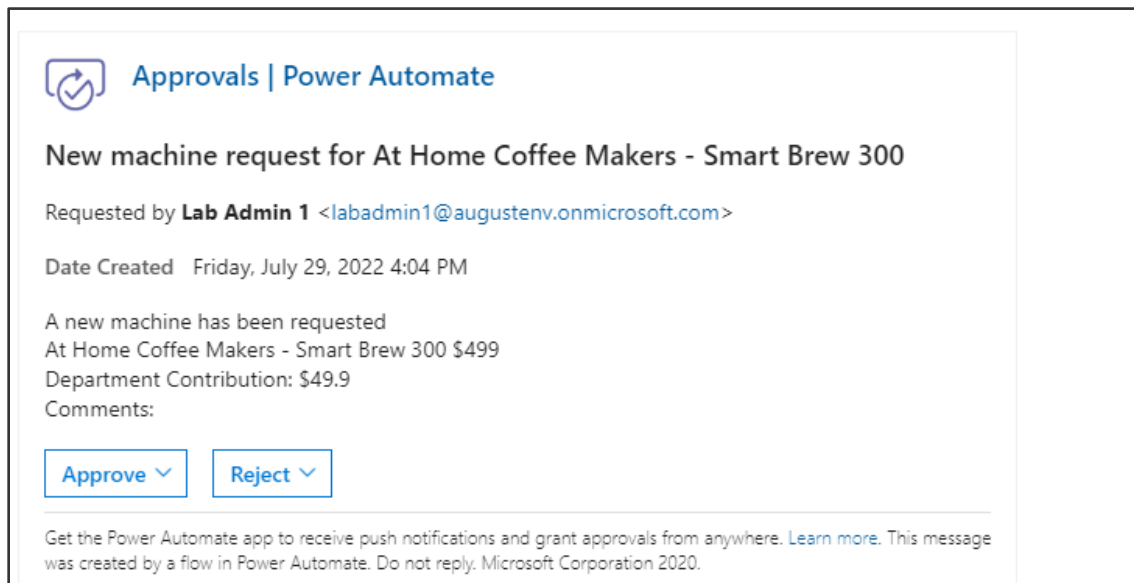
2. To submit a machine request, go to [Make Power Apps](#)
3. Select **Apps** and start the **Machine Ordering App**.
4. Select a few machines and click Compare.



5. Select one of the machines, provide email for Approver.

6. Provide a comment and click **Submit machine request**.
7. Click **OK**.
8. The flow will run and send email to the manager email you provided. The request for approval email will look like the image below; it will include **Machine information, Price, Department Contribution (the calculated field),** and the **Requester Comment**.

REMINDER: If the flow does not run immediately, please wait, it may take up to ten minutes for the flow to be triggered. To ensure the flow runs immediately, see note above - select the **Test** option in the top right and select the "I'll perform the trigger action" option. Then go ahead and submit a machine request. The flow should run immediately. The email, however, may take a few minutes to appear regardless of when the flow starts.



Approvals | Power Automate

New machine request for At Home Coffee Makers - Smart Brew 300

Requested by **Lab Admin 1** <labadmin1@augustenv.onmicrosoft.com>

Date Created Friday, July 29, 2022 4:04 PM

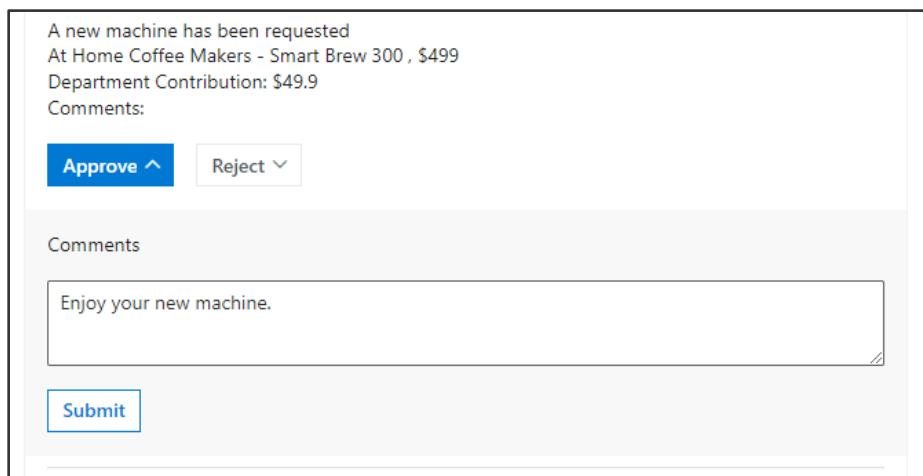
A new machine has been requested
At Home Coffee Makers - Smart Brew 300 \$499
Department Contribution: \$49.9
Comments:

Approve **Reject**

Get the Power Automate app to receive push notifications and grant approvals from anywhere. [Learn more](#). This message was created by a flow in Power Automate. Do not reply. Microsoft Corporation 2020.

9. Click **Approve**.

10. Add a comment and click **Submit**.



A new machine has been requested
At Home Coffee Makers - Smart Brew 300 , \$499
Department Contribution: \$49.9
Comments:

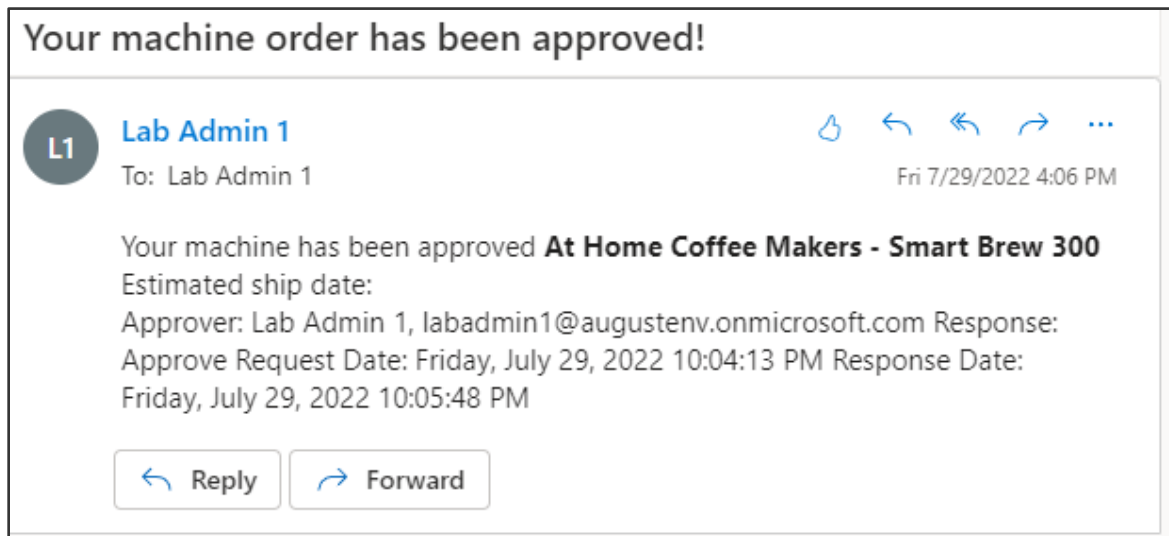
Approve **Reject**

Comments

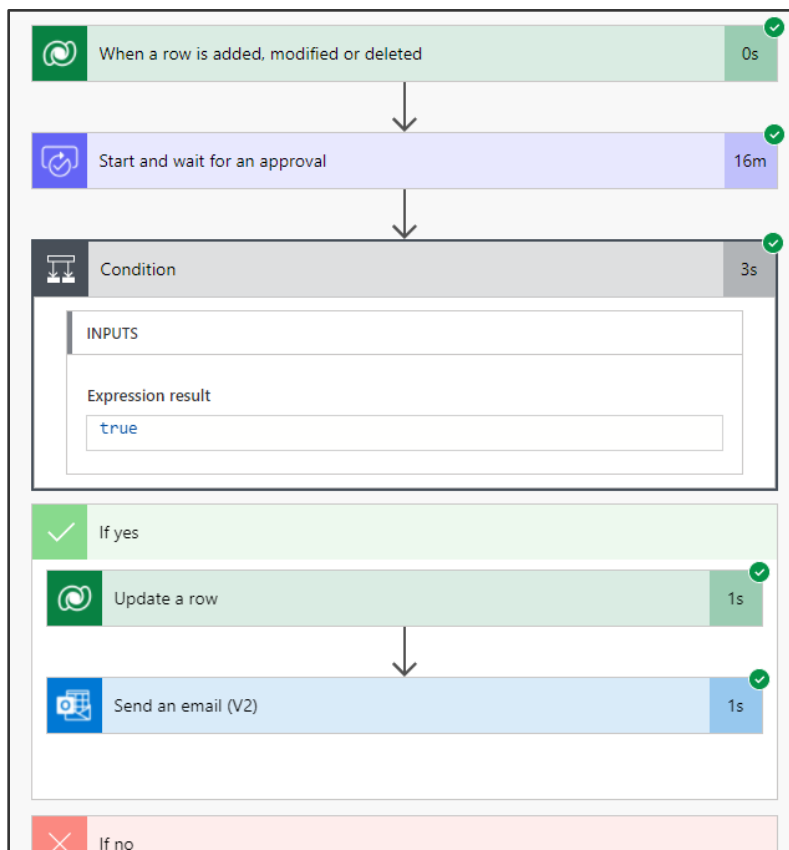
Enjoy your new machine.

Submit

11. The flow will continue to run; it will update the row and send an email to the requestor. The email sent to the requester will look like the image below.



12. Check the flow, you will notice that the flow is now marked as **Succeeded** in the run history.

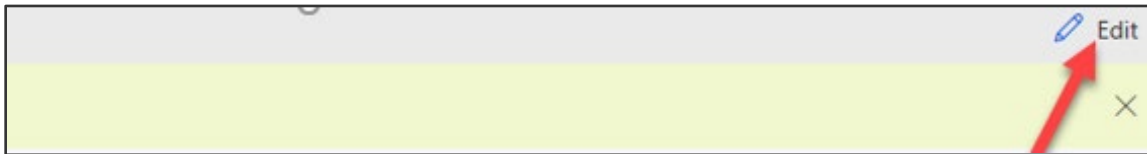


Exercise 4: Update the Flow

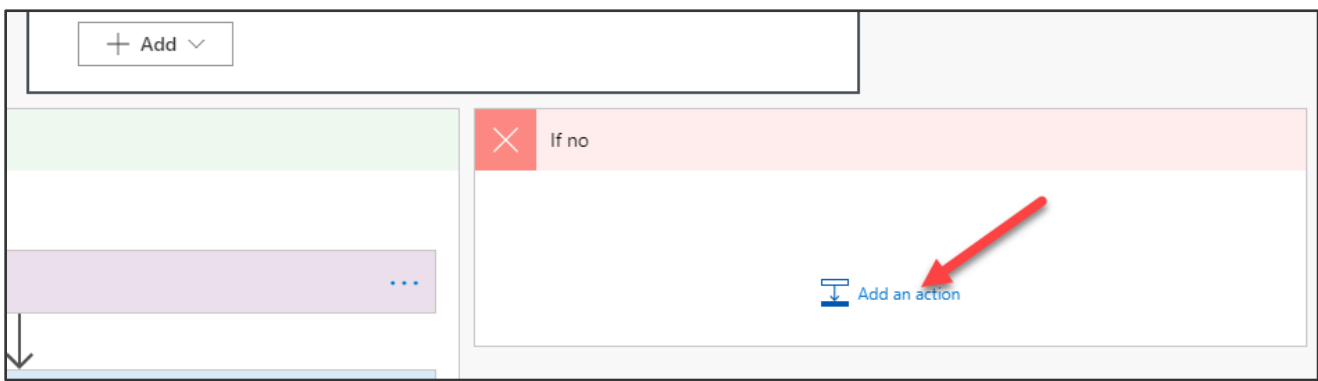
In this exercise, you will add two actions to the “if no” branch.

Task 1: Add actions

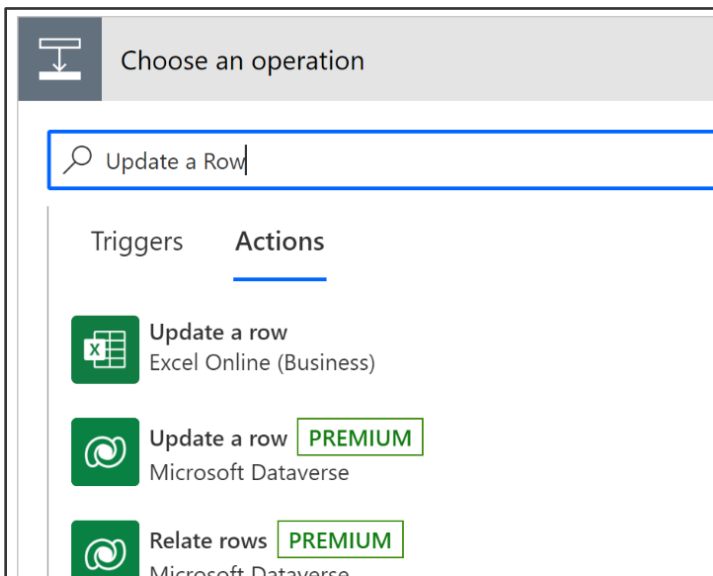
1. If you don't already have the flow open, open it in edit mode.



2. In the If no branch, click **Add an action**.



10. Search for **Update a Row** and select **Update a Row (Dataverse)**



3. Select **Machine Orders** for **Table Name**, select **Machine Order** for **Item ID**, and click **Show advanced options**.

✕ If no

Update a row 2

* Table name Machine Orders

* Row ID Machine Order x

Machine Name

Price Machine Price

Show advanced options

4. Select **Reject** for **Approval Status**.

Update a row 2

* Table name Machine Orders

* Row ID Machine Order x

Machine Name

Price Machine Price

(Deprecated) Stage Id Contains the id of the stage where the entity is located.

(Deprecated) Traversed Path A comma separated list of string values representing the unique identifiers of s

Approval Status Reject

5. Click **Add an action**.
6. Search for **send email** and select **Send an email (v2) - Office 365 Outlook**.

Choose an action

Send email

All Built-in Standard Premium Custom My clipboard

Mail Notifications Office 365 Outlook Gmail SMTP Outlook.com SendGrid

Send an email (V2) Office 365 Outlook

7. Click on the **To** field and select **Requested By** from dynamic content pane.

8. Enter **Your machine was not approved** for **Subject**.
9. Type **Sorry, your request for** in the body and select **Machine name** from the dynamic content pane.
10. Type **was NOT APPROVED.** after the machine name.
11. Select **Response summary** from the dynamic content pane.
12. The email should now look like the image below.

Send an email (V2) 2

*To: Requested By x

*Subject: Your machine was not approved

*Body: Font 12 B I U [Rich Text Editor Icons] Sorry, your request for Machine Name x was NOT APPROVED. Response summary x

Show advanced options v

13. **Save** the flow.

Task 2: Test the updated Flow

1. Click **Test** in the top right of the flow editor and start the Flow.
2. Run the Machine Ordering app -> Select a machine and submit an approval request.
3. You should receive an email with options to Approve or Reject the request. Select **Reject** this time and enter some comments, such as "Machine no longer available" Click **Submit**.

Date Created Friday, July 29, 2022 4:06 PM

A new machine has been requested
At Home Coffee Makers - Travel Brew 100 \$349
Department Contribution: \$34.9
Comments:

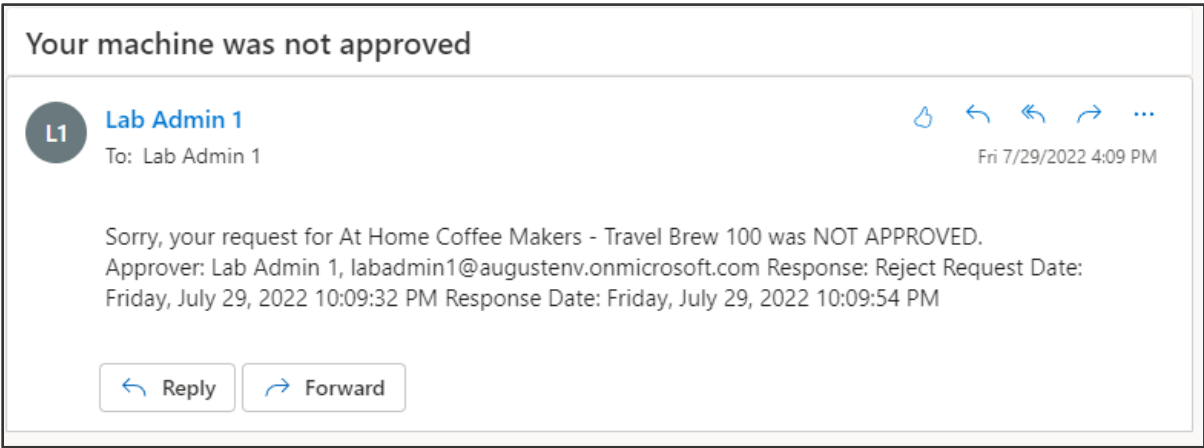
Approve v Reject ^

Comments

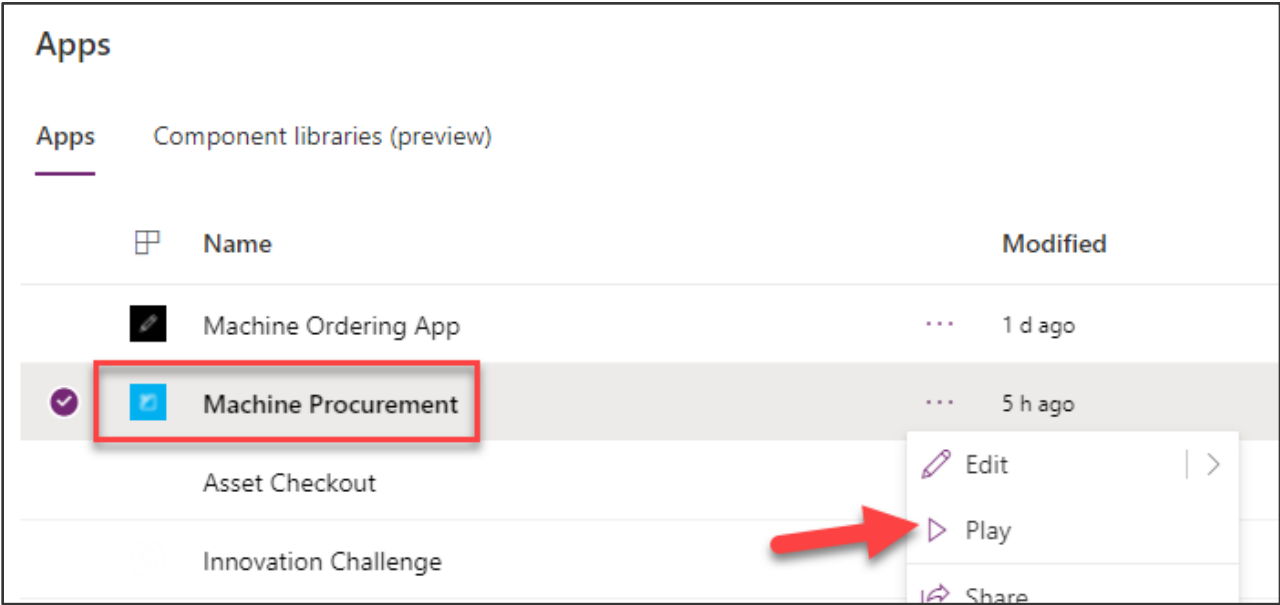
Machine no longer available

Submit

4. Confirm that the requestor receives an email informing them that their machine approval request was rejected.



5. Navigate to [Make Power Apps](#) select **Apps** and start the **Machine Procurement** application.

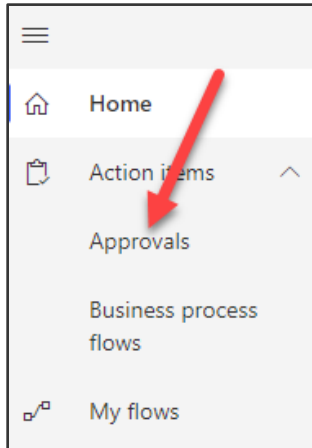


6. Machine Orders will now have the Approval Status.

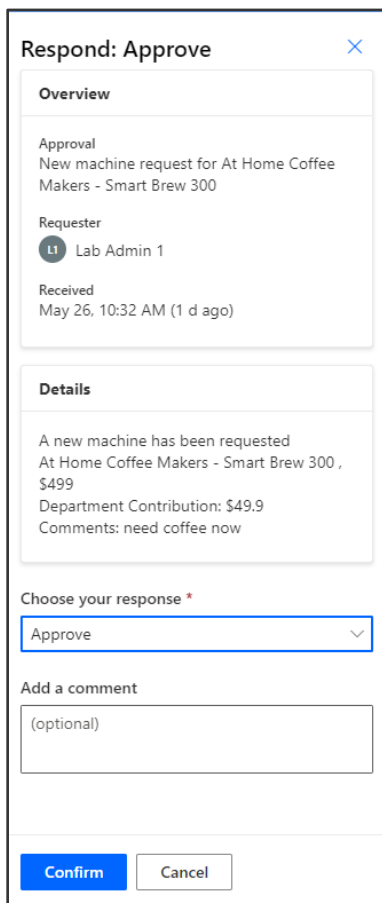
Active Machine Orders* ▼				Edit columns	Edit filter
Machine Name ▼	Created On ↓ ▼	Approval Status ▼	Estimated Ship ... ▼		
At Home Coffee Makers - Travel Brew 100	7/29/2022 10:09 PM	Reject			
At Home Coffee Makers - Travel Brew 100	7/29/2022 9:56 PM				
At Home Coffee Makers - Smart Brew 300	7/29/2022 9:53 PM	Approve			
Commercial Espresso Machines - Cafe Lite	7/29/2022 9:36 PM				

Task 3: Visit the approval center

1. Use the Machine Ordering app to **submit a few more approval requests**.
2. Navigate to [Power Automate](#) and make sure you are in the correct environment. Login with your lab credentials if prompted.
3. Expand **Action items** and select **Approvals**.



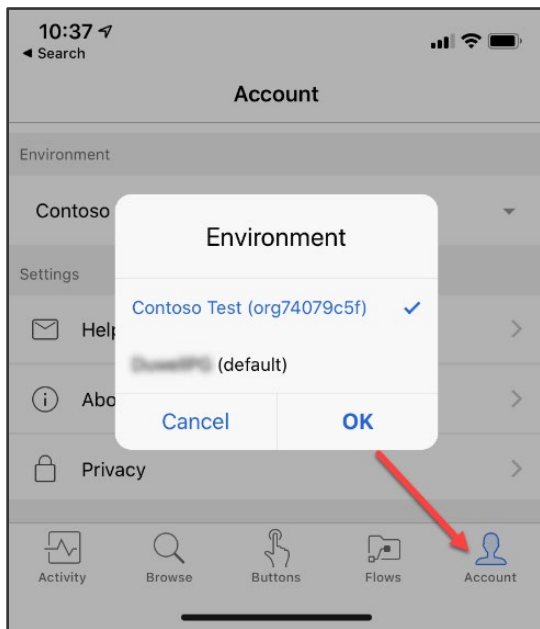
4. Notice that all pending approval requests are visible.
5. Go ahead and approve or reject a request from this screen. The details are displayed in the right pane where you can **enter comments** and **Confirm**.

A screenshot of the 'Respond: Approve' dialog box in Power Automate. The dialog has a title bar with a close button. It contains two main sections: 'Overview' and 'Details'. The 'Overview' section shows the approval type ('Approval'), the request description ('New machine request for At Home Coffee Makers - Smart Brew 300'), the requester ('Lab Admin 1'), and the received time ('May 26, 10:32 AM (1 d ago)'). The 'Details' section shows the request description, the machine model and price ('At Home Coffee Makers - Smart Brew 300, \$499'), the department contribution ('Department Contribution: \$49.9'), and the comments ('Comments: need coffee now'). Below these sections is a 'Choose your response' dropdown menu with 'Approve' selected. There is also a text box for 'Add a comment' with the placeholder '(optional)'. At the bottom are 'Confirm' and 'Cancel' buttons.

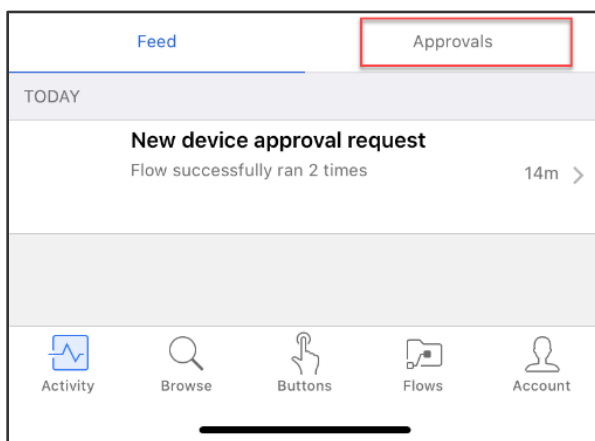
- The request will no longer be visible as it has been processed.

Note: All approval requests sent to the current logged on user will be visible in the Approvals Center. This includes approvals sent from any app or flow.

- You can also use the Approvals Center to view all requests that you have sent and are **Awaiting response** from the approver. Select the **Sent requests** tab at the top to view all requests that you have sent.
- Open the **Power Automate mobile app** on your mobile device.
- Login and switch to the environment where the flow is deployed.



- Select **Approvals** in the top right and view all pending approvals.



- You can quickly approve or reject these pending requests from this screen.
- If you have push notifications turned on and are signed into the flow mobile app – when you receive a new Approval request it will trigger a push notification on your phone. You can give this a shot.

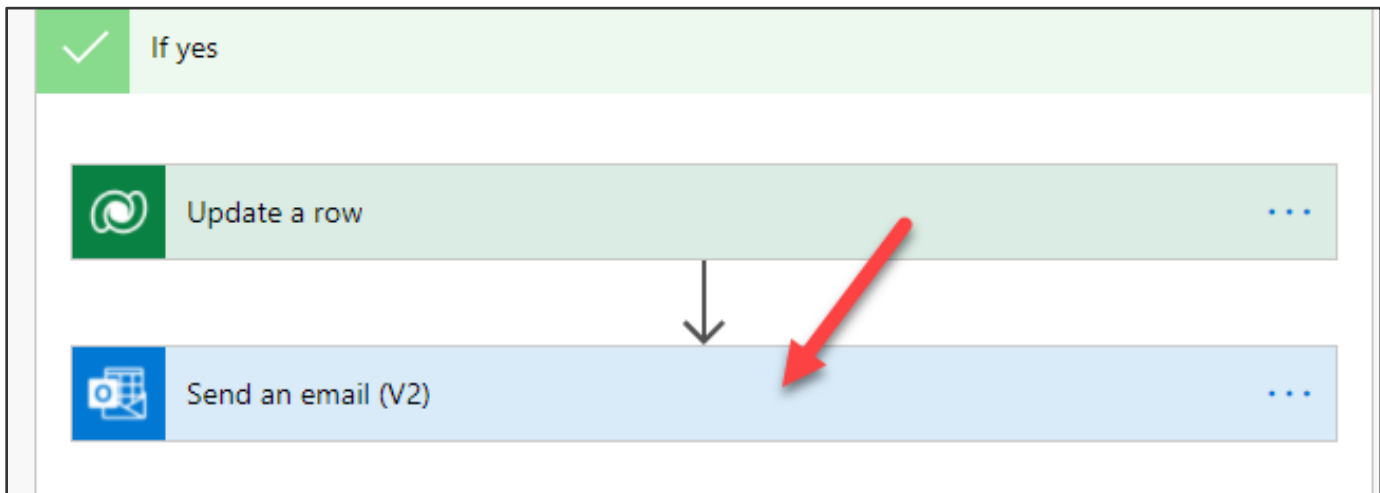
Congratulations! You have successfully completed this lab. You have created your Power Apps app and flow and connected them to a Microsoft Dataverse table. Now you are ready to build your own apps and workflows.

Exercise 4: (Optional) Add a Teams Notification

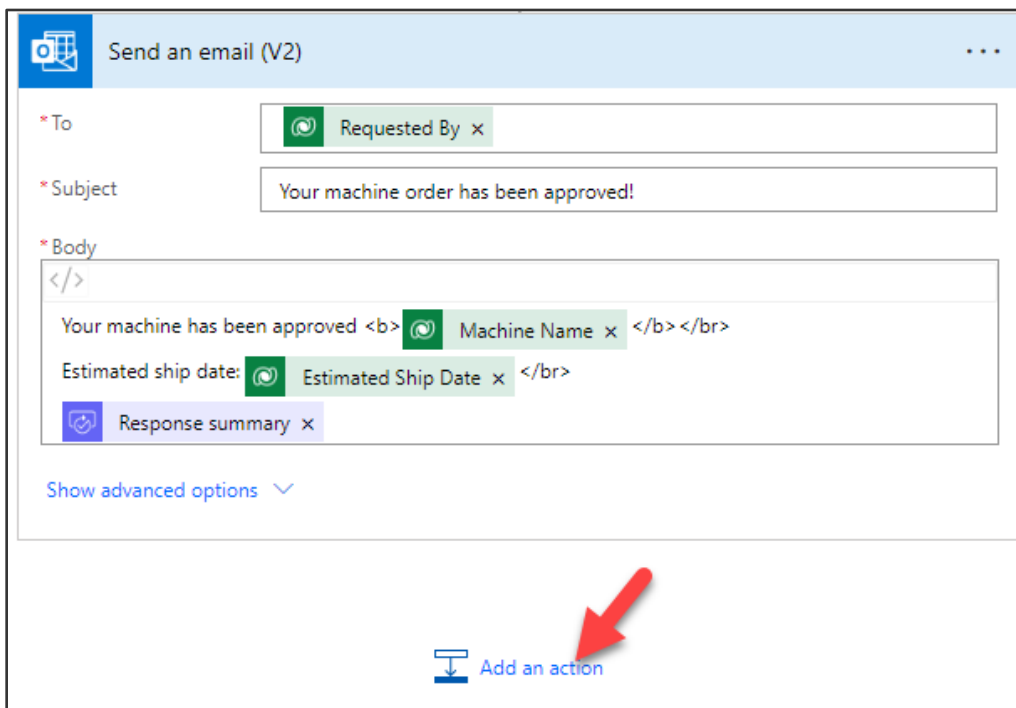
In this optional exercise, you will modify the existing flow to include a Teams notification for your approval flow.

Task 1: Modify the Flow

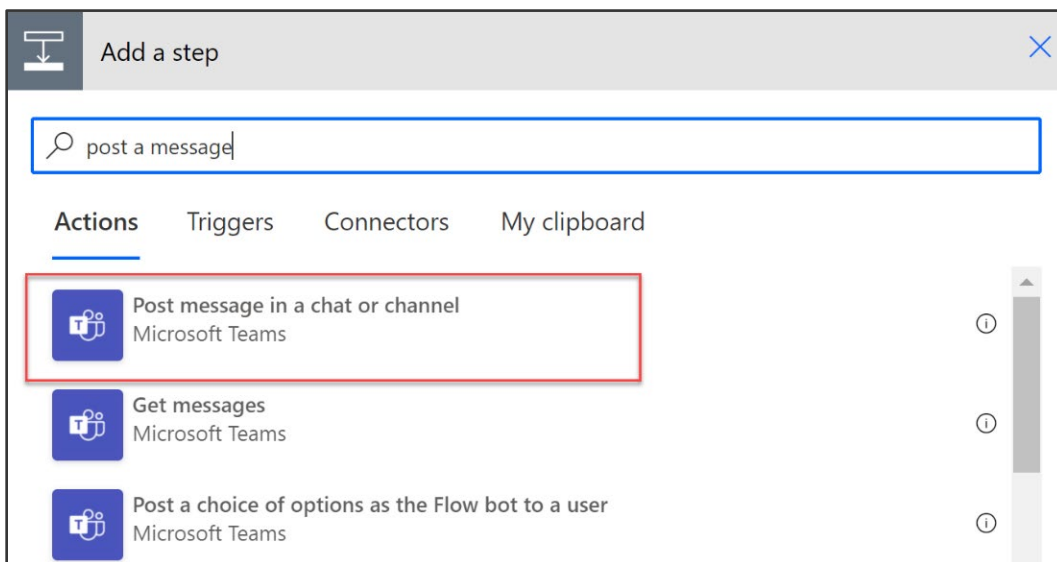
1. Click to expand the **Send an email** step inside the **If yes** branch.



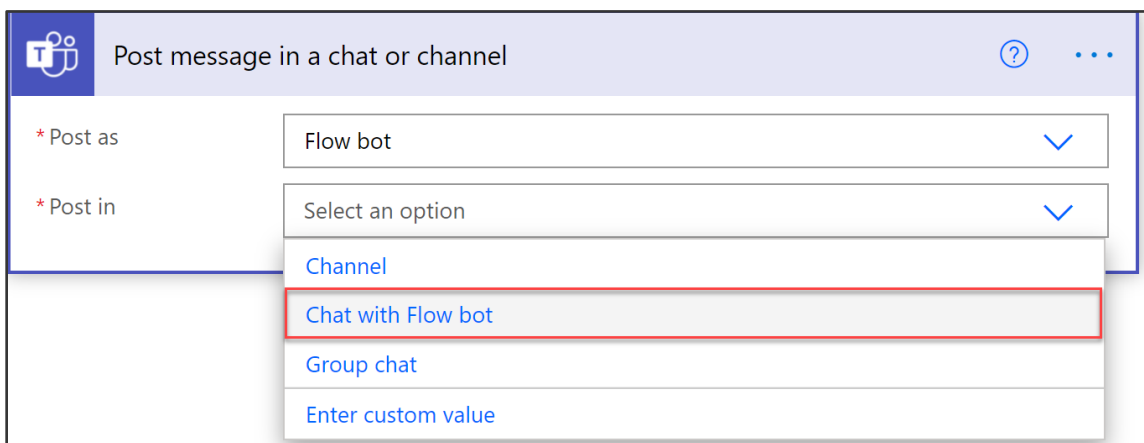
2. Click **Add an action**.



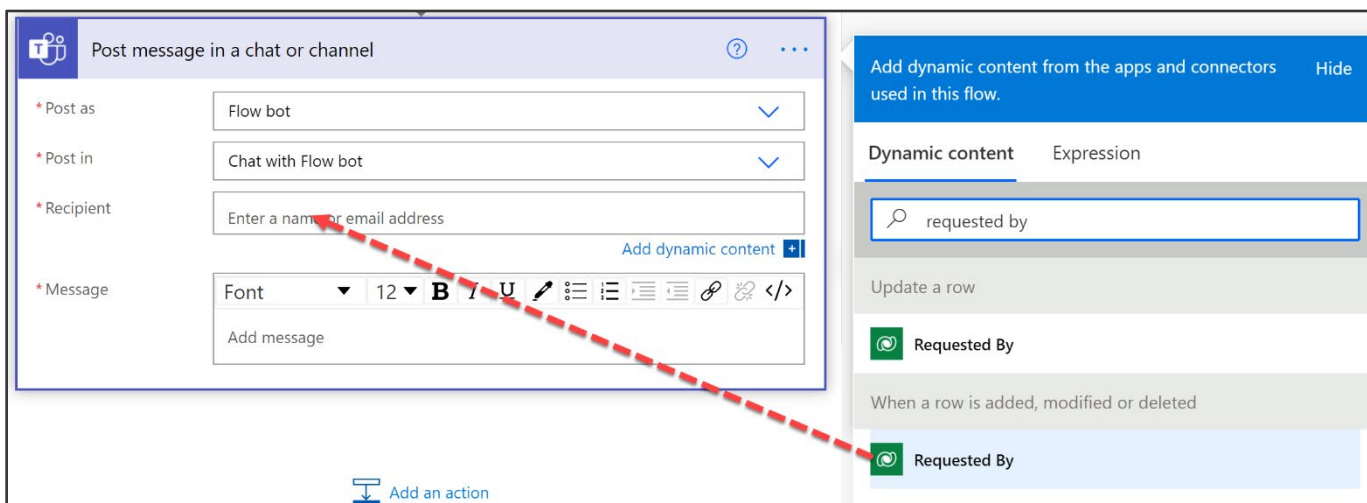
3. Search for post a message and select **Post a message in a chat or channel**



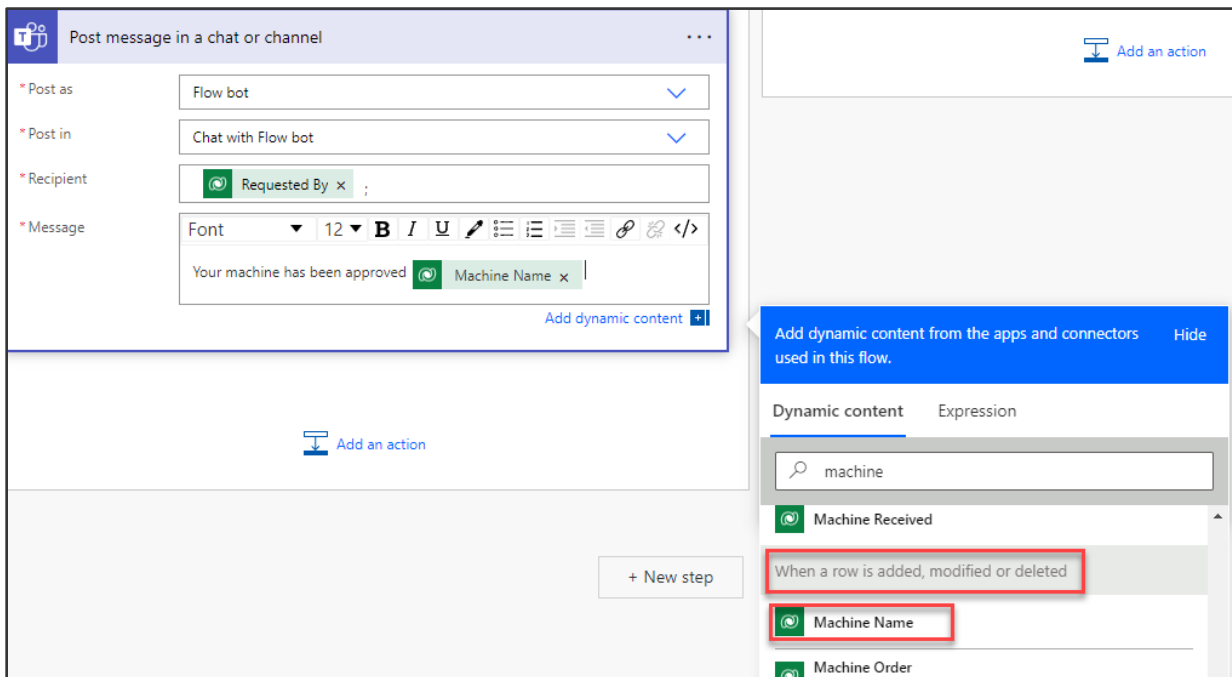
4. Select **Flow bot** for Post as and **Chat with Flow Bot** for Post in.



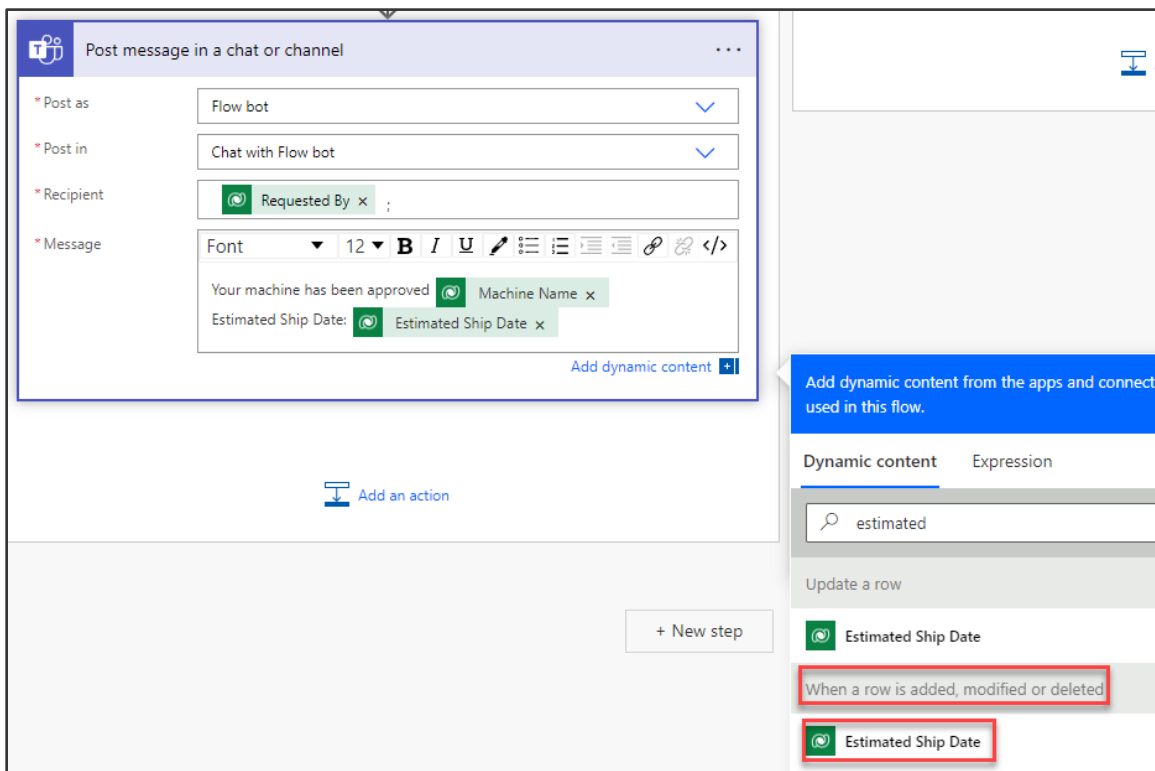
5. select **Requested By** in the Recipient field.



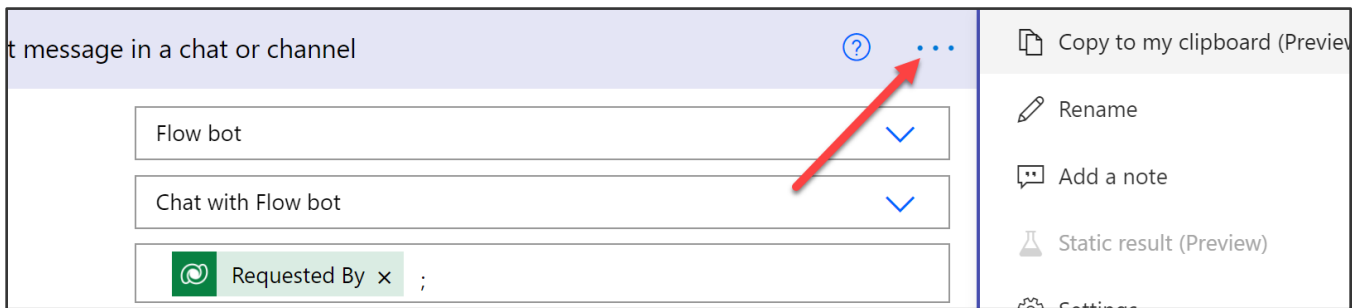
6. In the **Message** input, type **Your machine has been approved** and then select **Machine Name** from under the Dynamics Content **When a record is added...** header.



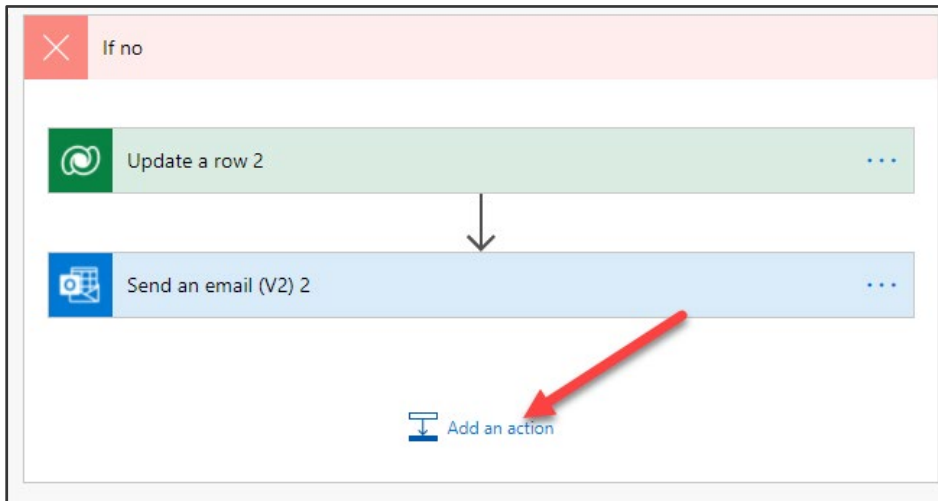
7. Type **Estimated Ship Date:** and then select **Estimated Ship Date** from under the Dynamics Content **When a record is added ...** header.



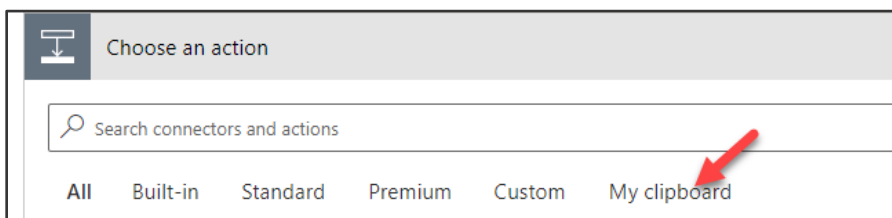
8. Click on the ... **Menu** button of the **Post a message** step and select **Copy to my clipboard**.



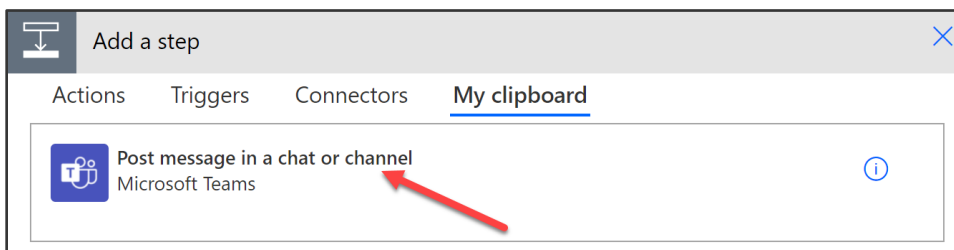
9. Go to the **If no** branch and click **Add an action**.



10. Select **My clipboard**.



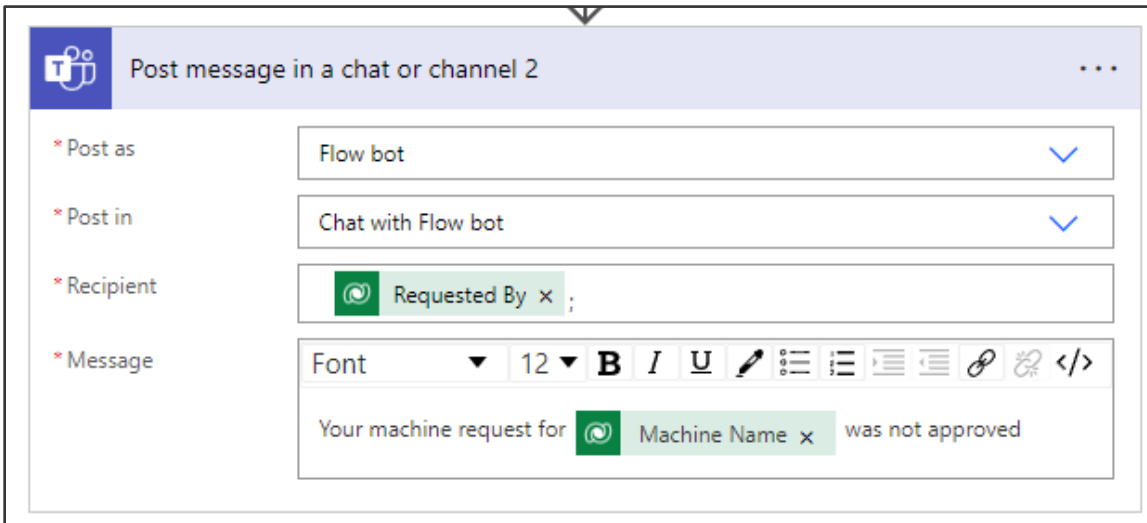
11. Select the step you copied.



12. Click to expand the step you just pasted.

13. Delete the current Message content and change the Message to **Your machine request for**

14. Place your cursor at the end of the text and select **Machine Name** from the dynamic content pane. Add **was not approved** to the end of the content. The step should now look like the image below.

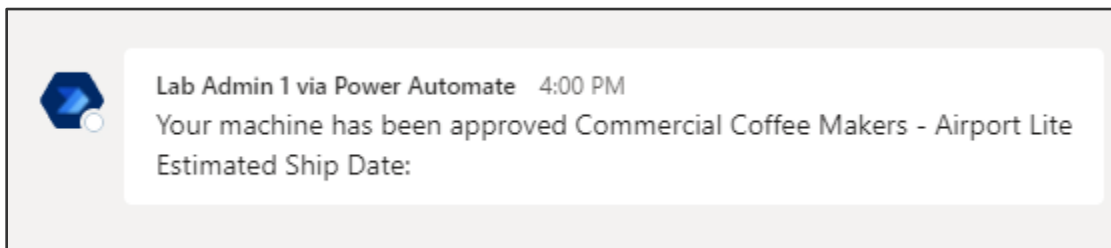


15. Click **Save** to save your changes.

Task 2: Test your modified flow

Now that the flow has been modified, you are ready to test it.

1. Click **Test** in the top right of the flow editor and select **Manually**
2. In another tab, navigate to [Microsoft Teams](#).
3. Open a third tab and run the Machine Ordering app -> Select a machine and submit an approval request.
4. You should receive an email with options to Approve or Reject the request. Select **Approve**.
5. Shortly after hitting submit, you should see a message and a notification in the Chat tab on your app bar – this is from the Flow Bot. Click to open the chat. Wait a moment if it does not appear immediately.
6. You should see the approval of the request.



References

App in a Day introduces some of the key functionalities available in Power Apps, Power Automate, Power BI and the Microsoft Dataverse. For an up to date list of learning references, see [Power Apps Resources](#) and [Power Automate Resources](#).

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