IT Basic BI Training Session IV

10/14/2022 Cole Thompson

Power Automate Browser Setup

1. See email titled "DPR – Apple Invoice" in your inbox. This email is a potential reoccurring invoice that is sent to your inbox when Apple products are ordered. This document has an attached PDF document that contains address, line items and all other order information.
2. Open IT Data Sharepoint > Documents > Training > Power Automate PDF Documents

https://dprprod.sharepoint.com/sites/ITData

3. Create New [+ New ∨] > Folder
4. Name this folder *Your Full Name*
5. Go to Home tab on the left
6. Create New > List
7. Blank List
8. Name this List *Your Full Name*
9. Select Create
10. Change Column name from "Title" to "Invoice_No" using column settings
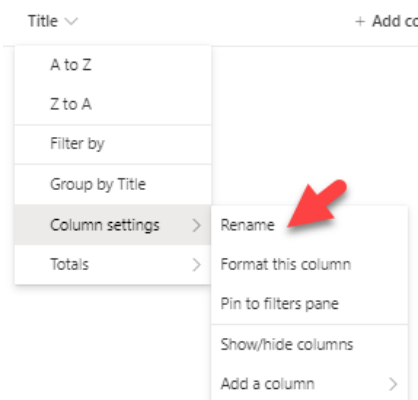
11. Add column as follows

Name	Invoice_No	Line_Item	Item_Cost	Order_Total	Tax	Bill_Address	Order_Date
Type		Single line of text	Currency	Currency	Currency	Single line of text	Date and time

Your list should look like this:

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Invoice_No ∨	Line_item ∨	Item_Cost ∨	Order_Total ∨	Tax ∨	Bill_Address ∨	Order_Date ∨	+ Add column ∨

12. Open DPR Toolbox: https://dprprod.sharepoint.com/sites/toolbox/Pages/Welcome.aspx

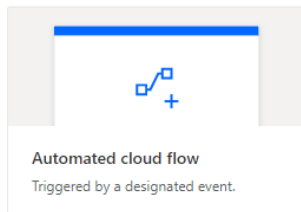13. Select 'App Launcher' ⊞ in the top left hand corner

14. Select 'All Apps' and Search "Power Automate"

15. Select ⯈ Power Automate

16. Enter Microsoft credentials if necessary

17. Click on ✛ Create Tab

18. Click on Automated cloud flow

Automated cloud flow
Triggered by a designated event.

     o Flow name:
YourName.Dev1
     o Choose your flow's trigger:
Outlook 365 Outlook - When a new email arrives (V3)
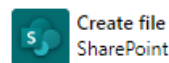   o Click 'Create'

19. Fill out fields
     o From: microsoft@powerapps.com
     o Subject Filter: Apple Invoice

20. Click *New Step*   + New step

21. Search "Create File Share Point"   Create file SharePoint

22. Fill out fields:
     o **Site Address**:
IT Data – https://dprprod.sharepoint.com/sites/ITData

     o **Folder Path**:
Shared Documents > Training > Power Automate PDF Documents > *Your Full Name*

Note: Use 'Show Picker' 🗁 and 'Show Contents' ⟩ for selecting folders

- o **File Name**:
  Attachments Name
  Attachments Name — Attachment name

Note: An apply to each box will pop up. This will apply this process to each attachment on the email.

- o **File Content**:
  Attachments Content
  Attachments Content — Attachment content

23. Click 'Save'
24. To Test, email will need to come in from microsoft@powerapps.com
    - o The Test Test button in the upper right hand corner is very useful during development
25. Click 'My Flows'
26. New Flow + New flow ∨
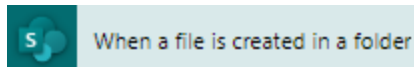27. Automated Cloud Flow Automated cloud flow
    - o Flow name:
      YourName.Dev2
    - o Choose your flow's trigger:
      SharePoint - When a file is created in a folder
    - o Click 'Create'

When a file is created in a folder

28. Fill out fields
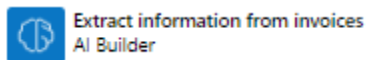   - o Site Address
      IT Data
    - o Folder Id
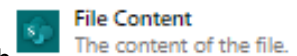   Shared Documents > Training > Power Automate PDF Documents > *Your Full Name*

    Note: Use 'Show Picker' and 'Show Contents' for selecting folders

29. Click *New Step* + New step
30. Search "Extract information from invoices"
    Extract information from invoices
    AI Builder

File Content
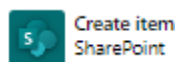The content of the file.

31. Fill invoice file as 'Sharepoint – File Content' in the Dynamic Content tab
32. Click *New Step* + New step

33. Search 'Create item – Sharepoint'
    Create item
    SharePoint
34. Fill out fields:

      o   **Site Address**:

IT Data – https://dprprod.sharepoint.com/sites/ITData
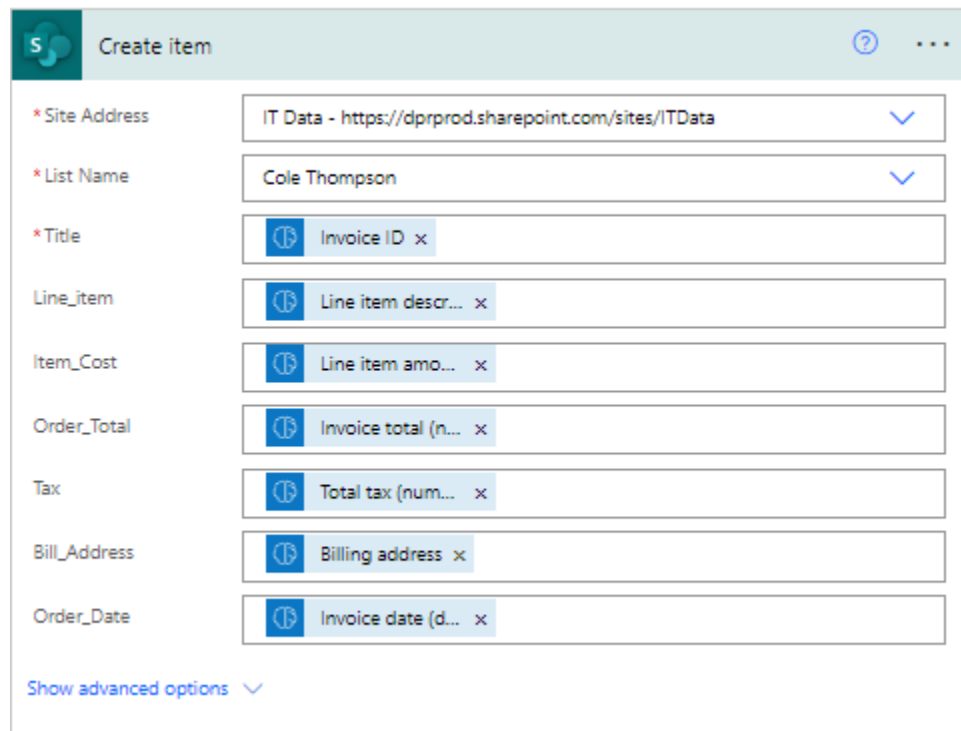
      o   **List Name**:

Your Full Name

35. Fill in all Fields

Name	Title	Line_Item	Item_Cost	Order_Total	Tax	Bill_Address	Order_Date
Dynamic Content	Invoice ID	Line item Description (text)	Line item amoun t (number)	Invoice total (number)	Total tax (number)	Billing Address	Invoice date (date)

See image for more details:

36. Save
37. Test with new email