Setting up the “Submit a Receipt” Skill for a Free/Pink AtBot Demo

# View a video of this AtBot Skill in action

* [in Microsoft Teams](https://youtu.be/EWXBYDQ4TVQ)

# Set up your bot

If you haven’t already, be sure to install AtBot from the Microsoft Teams App Store.[[1]](#footnote-1) Note that the free (pink) AtBot is connected to QnA Maker and provides everyday Microsoft Teams user support.[[2]](#footnote-2) That said, any keywords/-phrases and LUIS intents you provide will be reviewed first based on [AtBot’s order of precedence](https://tinyurl.com/AtBotOperations).

# Import the LUIS App

The LUIS App provides the natural language processing for the demo. It will be used to kick off the Flow.[[3]](#footnote-3) If you prefer not to use natural language processing (LUIS), you can skip this section and start in section C below; just be sure complete step C.5.b.

1. Download the LUIS App (JSON file) stored in the [demo resources GitHub](https://github.com/iamatbot/Demo-Skills/tree/master/Finance%20Bot/Submit%20a%20Receipt/Free%20AtBot%20Demo).
2. Open luis.ai and sign in.
3. In the My Apps listing, click **Import new app** > **Choose app file (JSON format)…** > **upload** the file downloaded in Step 1 of this section > **Train** > **Publish** (to production).
4. Click your name in the top-right corner > **Settings**.
5. Copy your **Authoring Key**. Place it somewhere for later (a text file, a Word document, a task in Outlook, etc.).

# Import the Flow

The Flow is the stepped workflow that runs once LUIS triggers it. The Flow will not run unless LUIS recognizes the request to be for time off or you provide a reserved keyword or key phrase to trigger it.

This Flow requires no outside (non-Microsoft) service connections to operate. However, it does make use of a SharePoint library for uploading photos of receipts if you choose to show a live connection in a demo. By default, the SharePoint steps are disabled. You can learn how to enable them in section E.

Import your Flow:

1. Download the Flow (ZIP file) stored in the [demo resources GitHub](https://github.com/iamatbot/Demo-Skills/tree/master/Finance%20Bot/Submit%20a%20Receipt/Free%20AtBot%20Demo). Do not unzip the file.
2. Open flow.microsoft.com and sign in.
3. Click **My Flows** > **Import** > **Upload** > Choose your file. Update each of the Resource Types as listed below. Once they are selected, click **Import**. For each Resource Type:
   1. Set *Flow* to “Create as new” if it is not already.
   2. Set *AtBot Logic Connection* to “Select during import”. If there is no connection listed, click **Create new** > **New connection** > Filter for **AtBot Logic** and click **Add [plus]**.Go back to the Flow tab > **Select during import** > choose your newly created connection > **Save**.
   3. Set *SharePoint Connection* to “Select during import”. If there is no connection listed, click **Create new** > **New connection** > Find **SharePoint** and **Add (plus)**.Go back to the Flow tab > **Select during import** > choose your newly created connection > **Save**. (Again, actually connecting to SharePoint in the Flow is optional, but you must assign this connection upon creating the Flow regardless.)
   4. Set *Office 365 Users Connection* to “Select during import”. If there is no connection listed, click **Create new** > **New connection** > Filter for **Office 365 Users** and **Add [plus]**.Go back to the Flow tab > **Select during import** > choose your newly created connection > **Save**.
4. Open the imported Flow: **My Flows** > **[Flow name]**.
5. Click the trigger to expand it.
   1. Ensure **Bot Trigger Type** is set to **Personal**[[4]](#footnote-4).
   2. In **Keyword**, provide a keyword or key phrase (e.g., *submit expense*) to use as a command to automatically start this Skill.[[5]](#footnote-5)
   3. Optionally, connect to the LUIS App you uploaded in section B above. If you are not integrating with LUIS, skip this step.
      1. Paste the **Authoring Key** from section B above into **LUIS API Key**.
      2. In **LUIS App**, select **GoBot** (presuming you didn’t change the app name).
      3. In **LUIS Intent**, select **Submit an expense** (presuming you didn’t change the intent name).

Your Flow, which is now connected to AtBot, is considered an AtBot Skill. We will use “Skill” from now on to represent Flows connected to AtBot.

When someone uploads a photo of a receipt to the bot, nothing actually happens behind the scenes. The bot simply responds as if something had. If you want to show an actual connection to a database, include the SharePoint steps listed in section E below.

# Example conversation in Teams

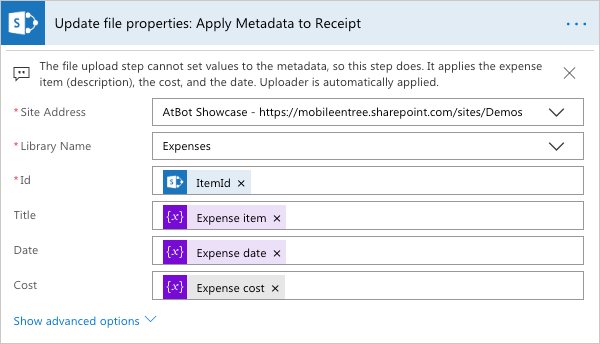
You can find a screenshot of an execution of this Flow using AtBot in Microsoft Teams in the [demo resources GitHub](https://github.com/iamatbot/Demo-Skills/tree/master/Finance%20Bot/Submit%20a%20Receipt/Free%20AtBot%20Demo).

Answers to date-related questions can be provided in your preferred date format or vernacular words for dates including, for example, “tomorrow” and “next Thursday”.

# Connecting your Skill to SharePoint

First you need to create the SharePoint library. Generally, a modern SharePoint Online site works best; it doesn’t matter whether you use a Team or Communication Site. If you’re creating from scratch, use a Team site and set the members as anyone that will be using the bot or demoing it.

Once you create your site:

1. Open you SharePoint site.
2. Click the **gear** in the top right corner > **Add an app** > **Document Library** > **[Give it a name]** > **Create** > **Open your library**.
3. Click **Add column** > **Date and Time** > Name it **Date**.
4. Click **Add column** > **Currency** > Name it **Cost** (choose the appropriate currency).
5. Order the columns left-to-right how you prefer.
6. In the **Condition** step, change *is equal to* to *is not equal to*.[[6]](#footnote-6)
7. In the **Create file: upload receipt** step, update the Site Address to the site you’re using from above. Update the Folder path to the Library you created. The File Name should be set (using a Flow expression to concatenate the date and time and the user name to create a unique name.
8. In the **Update file properties: Apply Metadata to Receipt** step, update the **Site Address** to the site you’re using and the **Library Name** to the library you created. If necessary, updated the Title, Date, and Cost using the LUIS entities and your cost variable, as shown below:  
   
9. In the **Send reply: Confirmation** step, update the URL listed in the HTML to point to your SharePoint Library.

1. Only available in the commercial/education cloud. Not available in the Microsoft government cloud (GCC, GCC High, GCC DoD). [↑](#footnote-ref-1)
2. This QnA Maker knowledge base is owned and operated by the AtBot Team and cannot be changed. [↑](#footnote-ref-2)
3. This LUIS App includes entities including whether the user indicates vacation or sick time, and the start and end dates of their request. However, these entities can only pass over to Flow using LUIS Intent Vectors, which requires an Enterprise AtBot. More details on setting up an equivalent enterprise bot demo are available [here](https://github.com/iamatbot/Demo-Skills/tree/master/Finance%20Bot/Submit%20a%20Receipt/Enterprise%20AtBot%20Demo). [↑](#footnote-ref-3)
4. You can set the Skill to **Shared** if you’d like, but you are limited to six shared Skills per organization. The last six Skills that were edited will be the only ones available. Making the Skill **Personal** ensures you are able to use it whenever you want; however, you are limited to three Person Skills and only you can execute them. [↑](#footnote-ref-4)
5. This is optional if you are using LUIS (section B). If you’re not using LUIS, you must provide a keyword or key phrase. Note that most customers will be most wow’ed by the natural language processing (LUIS). [↑](#footnote-ref-5)
6. This enables the SharePoint step. Flow has no out-of-the-box way to provide an optional step, i.e. “comment out” a step. This process is a clean way to toggle whether the steps run. By default, “if 1 equals 1, skip SharePoint”. This action changes this to be “if 1 does not equal 1, do not skip SharePoint”, or, put simply, “if 1 equals 1, do the SharePoint steps”. If this doesn’t make sense, don’t worry about it. It works. [↑](#footnote-ref-6)