



Microsoft Power Platform **CONFERENCE**

POWER BI

POWER AUTOMATE

POWER APPS

POWER VIRTUAL AGENTS

POWER PAGES

Extending Dynamics 365 CE First

Party Apps with Power Automate

Heidi Neuhauser

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Whova



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**Event Invitation Code:
PPCFall2023**

Hi! I'm Heidi Neuhauser

- Working with Microsoft CRM for 13 years
- I chair the Philadelphia D365 & Power Platform User Group ([come join us!](#))
- We have 4 cats, 1 dog and a cockatiel
- I have 2 awesome kids and love running!
- Built www.ConnectorReview.com with my husband & business partner, Nick Hance



Partner, Reenhanced





Agenda

- Power Automate 101
- Built-in Connectors
- Dataverse Connectors Deep Dive
- Connectors to Extend Dynamics for Sales
- Connectors to Extend Dynamics for Customer Insights - Journeys
- Connectors to Extend Dynamics for Service



Quick disclaimer!

During the next hour, I will be delivering A LOT of Content! This will go fast and it may feel like information overload.

Use these slides as a reference to look back on – if you fill out this form, you'll get a link to access the slides [via an automated cloud flow using the Gravity Forms and Office 365 Outlook connectors](#).

www.reenhanced.com/slides

Power Automate 101

- Flows in Power Automate are like traditional CRM workflows, but they are far more powerful
- Reach far beyond the traditional lines of CRM!
- ~~Scribe, KingswaySoft, Custom Integrations~~
- Build connections between software without deep technical knowledge

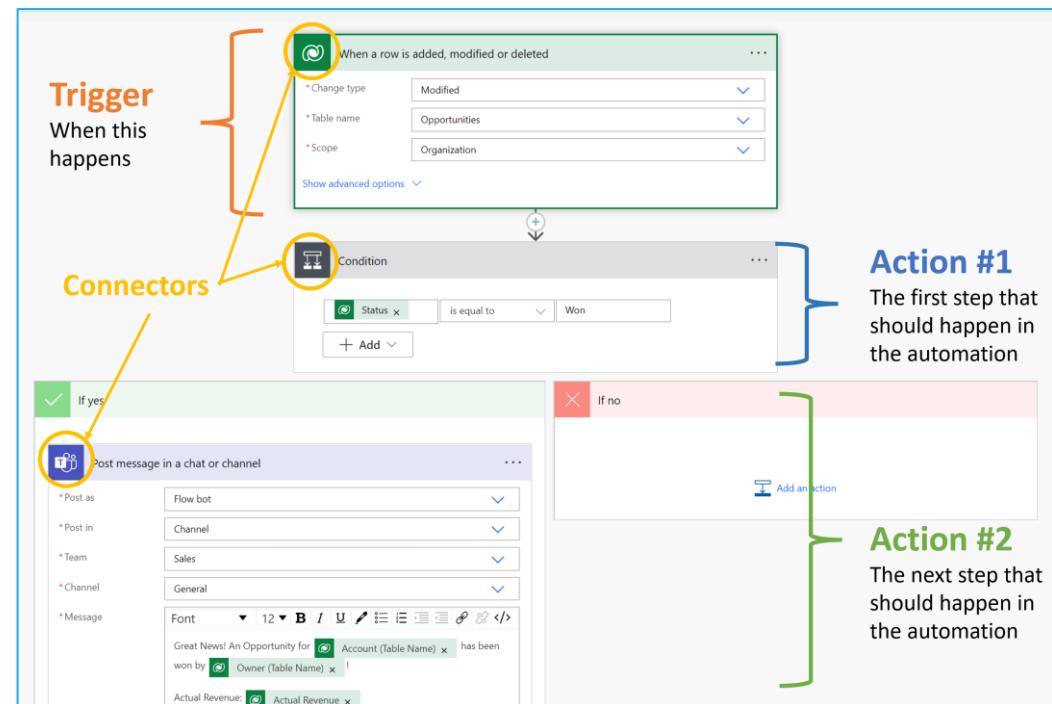
3 types of flows:

1. Automated cloud flow
2. Instant Cloud flow
3. Scheduled cloud flow

Templates available at <https://powerautomate.microsoft.com/en-us/templates/>

Anatomy of a Flow

- 1. Triggers:** what causes the flow to begin.
- 2. Actions:** what is automated once something meets the trigger.
- 3. Connectors:** a wrapper around an API that lets systems talk to Power Automate and contain a series of pre-built actions and triggers to help build your automations.



Connector Review by [@crmheidi](#)

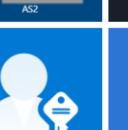
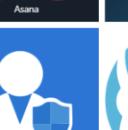
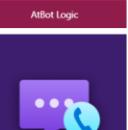
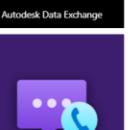
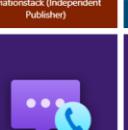
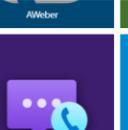
Filter by tag:

Quickfind:

Displaying 1058 Connectors

Tags

- [3D Models](#)
- [Access Tokens](#)
- [Accounting Software](#)
- [Adaptive Cards](#)
- [Adobe](#)
- [Affirmations](#)
- [AI](#)
- [Alumni](#)
- [Analytics](#)
- [Animal Rescue](#)
- [API Management](#)
- [Appointments](#)
- [Approvals](#)
- [Art](#)
- [Articles](#)
- [Asset Management](#)
- [Avatar](#)
- [Aviation](#)
- [AWS](#)
- [Azure](#)
- [Badges](#)
- [Bank Holidays](#)
- [Banking](#)
- [Barcode](#)
- [Big Data](#)
- [BIN Verification](#)

 j}eights gen. Document & more	 10to8 Appointment Scheduling	 1Me Corporate	 1pt (Independent Publisher)	 24 pull request (Independent Publisher)	 365 training	 3E®	 Abortion Policy (Independent Publisher)	 absentify	 AccuWeather (Independent Publisher)	 act!	 Acumatica	 Adobe Acrobat Sign	 Adobe Creative Cloud	 Adobe Experience Manager	 Adobe PDF Services
 Advanced Data Operations	 Advanced Scraper (Independent Publisher)	 Affirmations (Independent Publisher)	 Africa's Talking Airtime	 Africa's Talking SMS	 Africa's Talking Voice	 AfterShip (Independent Publisher)	 AgilePoint NX	 Agilite	 Ahead	 Ahead (Intranet)	 AIForged	 AIHW MyHospitals (Independent Publisher)	 AikiDocs	 Airlabs	 Airly (Independent Publisher)
 Airmeet	 airSlate	 Airtable (Independent Publisher)	 Alemba ITSM	 Aletheia	 Alkyomi	 allGeo	 Ally	 Almabase	 Amazon Redshift	 Amazon S3	 Amazon SQS	 Ambee (Independent Publisher)	 AMEE Open Business (Independent Publisher)	 Annature (Independent Publisher)	 Anthropic (Independent Publisher)
 Apache Impala	 APITemplate (Independent Publisher)	 APlace.io (Independent Publisher)	 App Power Forms	 Appfigures	 Approvals	 AppsForOps Timeline	 AppGrent PowerTools	 PowerTools LITE	 AppHub (Independent Publisher)	 Aquaforest PDF	 ArcGIS	 ArcGIS Paas	 AS2	 Asana	 Asite
 Agile (KSA)	 Agile (UAE)	 Agile (US Gov.)	 Asently E-Sign	 AtBot Admin	 AtBot Logic	 Autodesk Data Exchange	 AvePoint Cloud Governance	 Aviationstack (Independent Publisher)	 AiWeber	 AExtension Content Gate	 Azure AD	 Azure AD App Registrations	 Azure AD Identity and Access	 Azure AD Identity Protection	 Azure App Service
 Azure Application Insights	 Azure Automation	 Azure Batch Speech-to-text	 Azure Blob Storage	 Azure Cognitive Service for Language	 Azure Communication Services Chat	 Azure Communication Services Email	 Azure Communication Services Identity	 Azure Communication Services SMS	 Azure Communication Services SMS Events	 Azure Container Instance	 Azure Cosmos DB	 Azure Data Explorer	 Azure Data Factory	 Azure Data Lake	 Azure Database for My

Power Automate Connectors

MORE THAN 1,060 MICROSOFT-CERTIFIED CONNECTORS TO EXTEND YOUR DYNAMICS 365 SYSTEM!

Built-in Connectors

- 15 built-in connectors you can use in your flows.

Choose an operation

Search connectors and actions

All Built-in Standard Premium Custom My clipboard

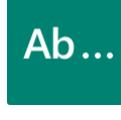
 Control	 AI Builder	 Data Operation	 Date Time	 Flows	 HTTP	 Number Functions
 Power Pages	 Power Virtual Agents	 PowerApps	 Request	 Schedule	 Text Functions	 Variable
 Flow button for mobile						

Connector	Triggers	Actions	When to Use
	Control	None 6: Condition, Apply to each, Do until, Scope, Switch, Terminate	To manage and differentiate automation logic.
	AI Builder	None 18: Analyze sentiment, Classify text, detect, translate, predict and more	In conjunction with AI – to do many different cool things using the AI Builder model.
	Data Operation	None 7: compose, create table (csv or html), filter, join, parse JSON, select	Manipulate data you will use elsewhere in the flow.
	Date Time	None 6: Add to time, convert time zone, current time, get future time, get past time, subtract from time	Work with time in an action step that you can use later in a flow.
	Flow button for mobile	1: Manually trigger flow None	As an option when creating your instant cloud flow.

Built-In Connectors

Connector	Triggers	Actions	When to Use
	Flows	None 1: Run a Child Flow	Use child flows to break out/encapsulate complicated logic.
	HTTP	3: HTTP, HTTP + Swagger, HTTP Webhook 3: HTTP, HTTP + Swagger, HTTP Webhook	For web services that don't have a connector. (Developer alert!)
	Number Functions	None 1: Format number	When you need formatted numbers in other parts of your flow.
	Power Pages	1: When Power Pages calls a flow 1: Return value(s) to Power Pages	Start a flow inside of Power Pages or send value from another system to a Power Page.
	Power Virtual Agents	1: When Power Virtual Agents calls a flow 1: Return value(s) to Power Virtual Agents	Start a flow inside of Power Virtual Agents or send value from another system to a chat bot.

Built-In Connectors

Connector	Triggers	Actions	When to Use
	Power Apps PowerApps (V2)	1: Respond to a Power App or flow	Trigger a flow from Power Apps, perform work in other systems & return a response back to Power Apps.
	Request 1: When an HTTP request is received	1: Response	The trigger & action should be used together to make an ad-hoc custom API. (Developer alert!)
	Schedule 1: Recurrence	2: Delay, Delay Until	Use the trigger to create a scheduled cloud flow. Use the actions to delay additional automation within a flow.
	Text Functions None	2: Find text position, Substring	When you need to get a subset of characters from a string.
	Variable None	6: Append to array, Append to string, Decrement, Increment, Initialize, Set	Use Initialize Variable as your first action step. Use additional Variable actions as needed (the variable can change over time).

Built-In Connectors

Some common use cases where you want to utilize a built-in connector

To create a URL that is a hyperlink to a CRM/CE record

- Compose action in the **Data Operation** connector.

To provide different Yes/No paths based on a prior step

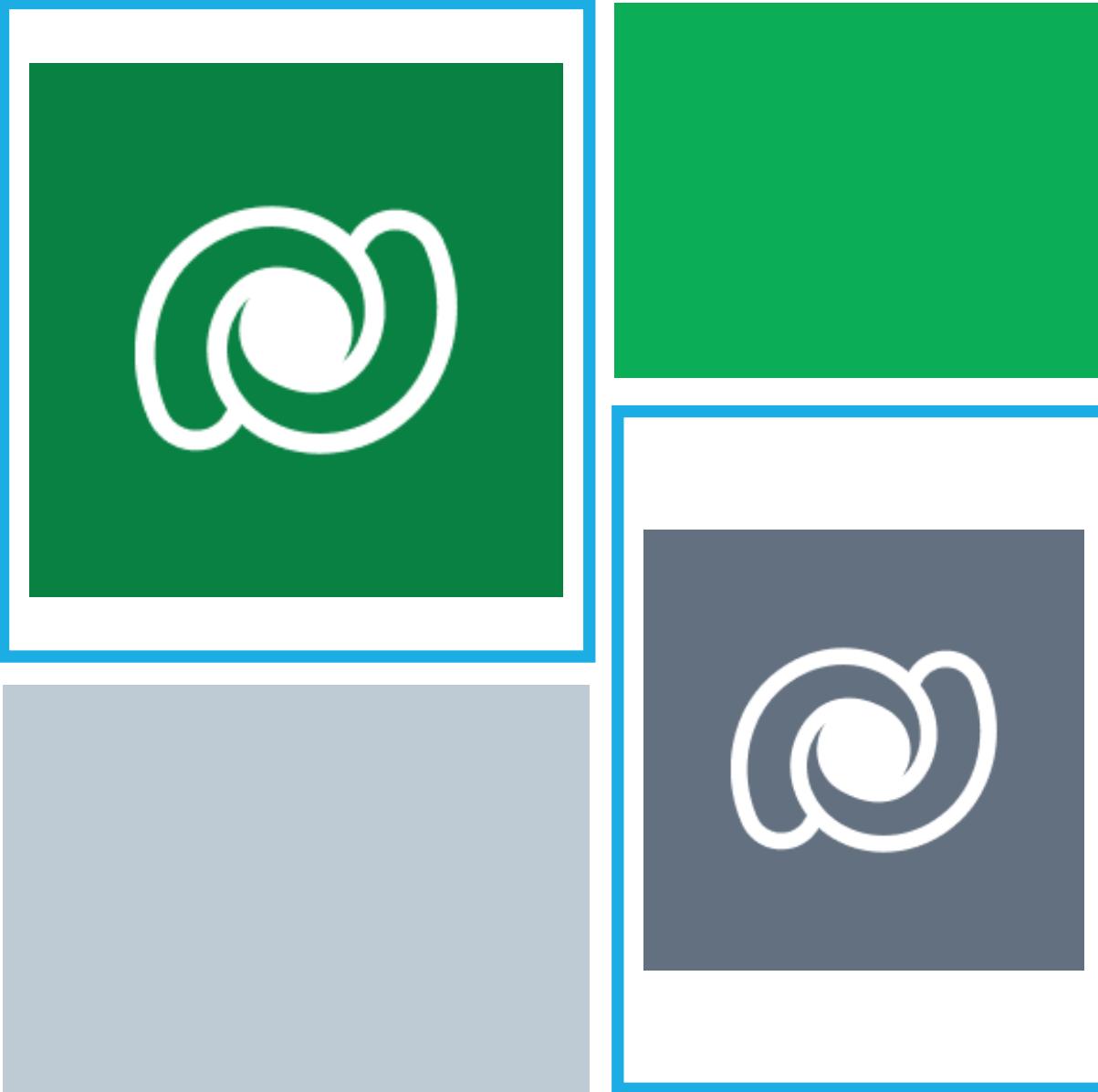
- Conditional action in the **Control** connector.

To create a table display instead of a list of items

- Create table action in the **Data Operation** connector.

To delay an action

- Delay or delay until action in the **Schedule** connector.



Let's Get to
Know the
Dataverse
connectors

Why are there two?

MICROSOFT DATAVERSE

- 3 Triggers
- 14 Actions



Triggers:

- When a flow step is run from a business process flow
- When a row is added, modified or deleted
- When an action is performed

MICROSOFT DATAVERSE (LEGACY)

- 4 Triggers
- 5 Actions

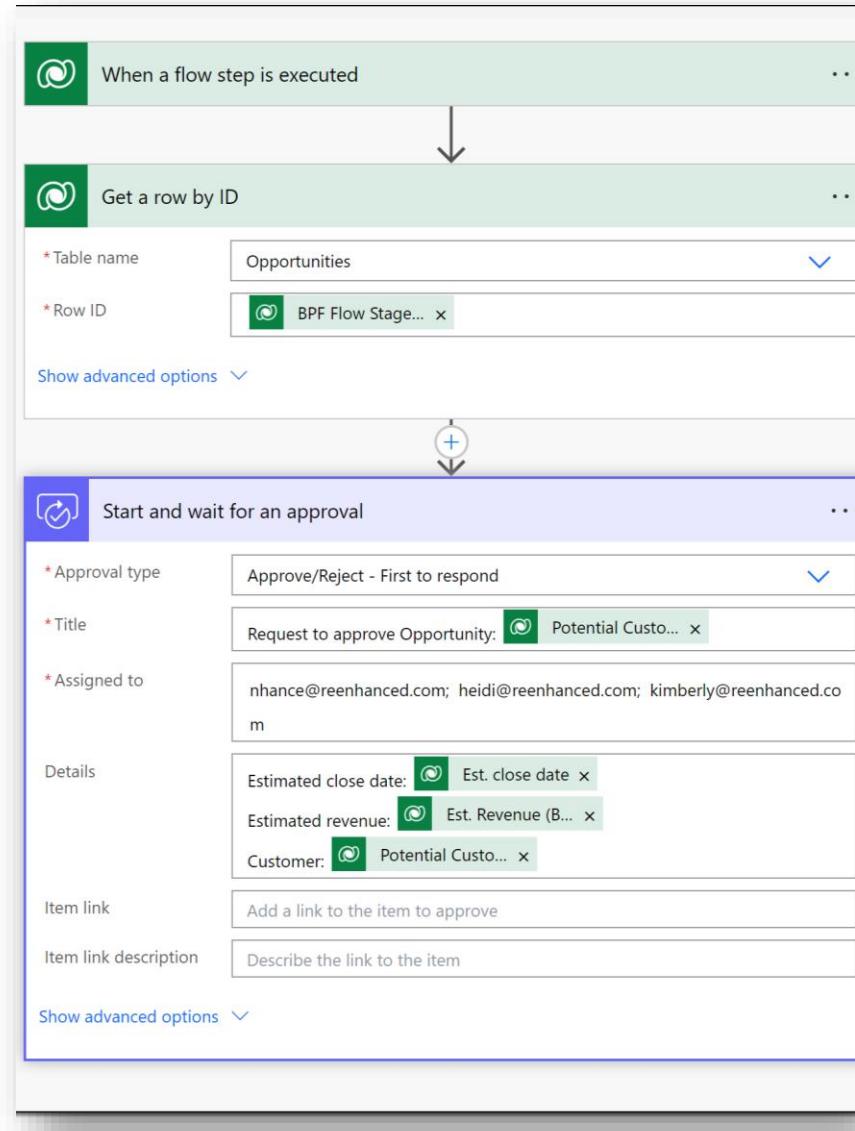


Triggers:

- When a row is selected
- When a row is deleted
- When a row is added
- When a row is modified

Deep Dive into the Dataverse Connector Triggers

START A FLOW WHEN SOMETHING HAPPENS IN CRM/CE WITH ONE
OF THE TRIGGERS.



When a flow step is run from a BPF

Add this to your BPF as a Run Flow button.

How to Use:

1. Build an instant cloud flow with this trigger.
2. Update your Business Process Flow – add a “Flow Step” with your flow details here.
3. Save, publish & test!

Example: Start Approval from Business Process Flow

Objects <

Search

All (5)

- Apps (2)
- Cards (0)
- Chatbots (0)
- Cloud flows (0)
- Processes (1)
- Site maps (1)

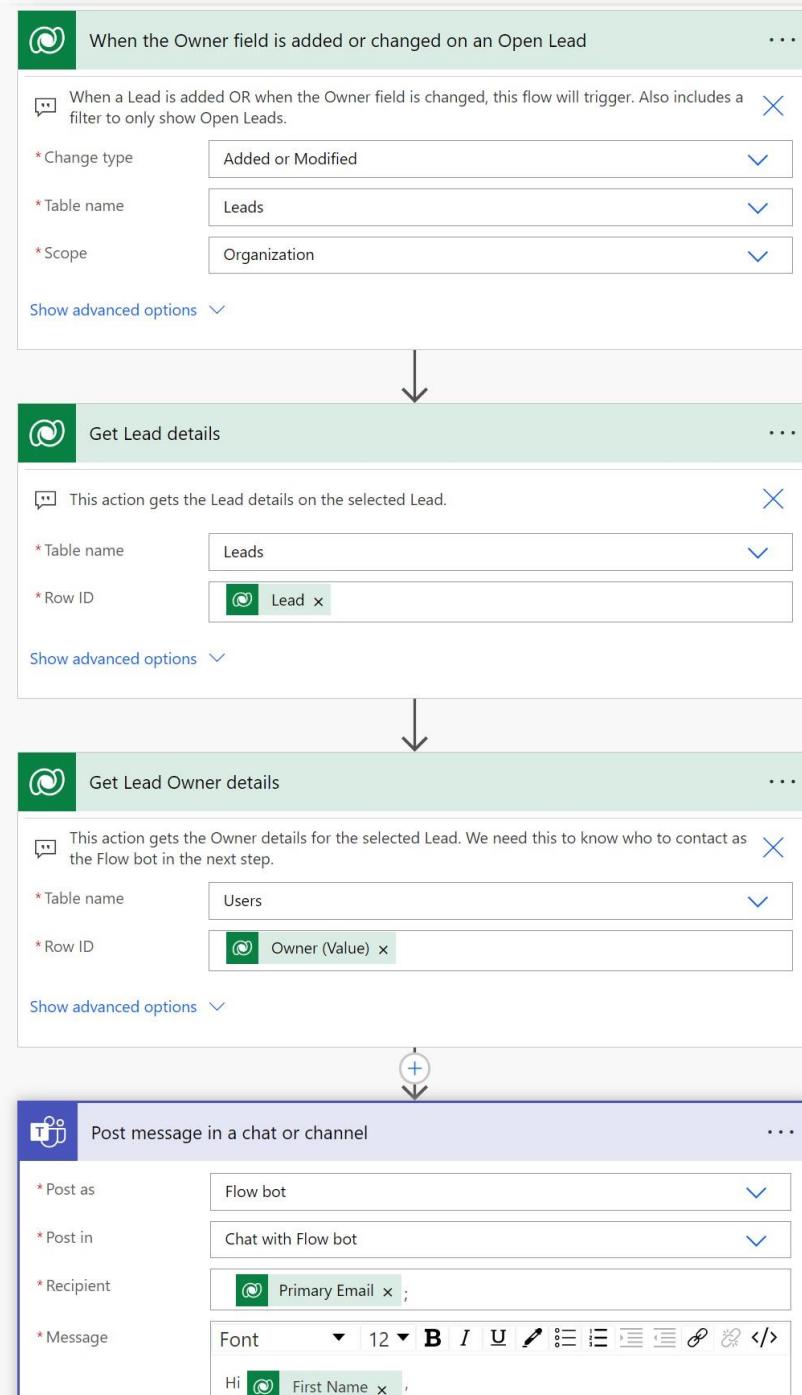
> Tables (1)

+ New ▾ Add existing ▾ Publish all customizations ...

Fun with Dataverse Connectors > All

Display name ↑ ↓	Name ↓	Type ↓	Managed ↓	Last Modif... ↓	Owner ↓	Status
Lead to Opportunity Sales Process	Lead to Opportunity Sales Process	Process (Business Logic)	Yes	5 days ago	SYSTEM	On
Lead To Opportunity Sales Process	leadtoopportunitiesalesprocess	Table	Yes	5 days ago	-	
Sales Hub	msdynce_saleshub	Model-Driven App	Yes	5 days ago	-	On
Simple app	crmheidi_Simpleapp	Site Map	No	23 minutes ago	-	
Simple app	crmheidi_Simpleapp	Model-Driven App	No	23 minutes ago	-	On

In Power Automate
Starter Kit as Start
Approval from BPF



When a row is added, modified or deleted

Start a flow anytime a new record is added, updated or removed in Dynamics 365.

Use in scheduled or automated cloud flows.

Example: When a new Lead is assigned, send a Teams channel message using the flow bot.

In Power Automate
Starter Kit as **Message**
New Leads in Teams
Chat



The screenshot shows the homepage of the FetchXML Builder website. At the top, there's a blue header bar with the FetchXML Builder logo (a blue circle with yellow letters 'FXB') and the text 'FetchXML Builder'. Below the header is a navigation menu with links: HOME, FEEDBACK, FEATURES, RELEASES, SUPPORTERS, HISTORY, INTEGRATE, and JONASR.APP. The main content area features the heading 'FetchXML Builder for XrmToolBox' and a large blue circular logo with 'FXB' in yellow. A testimonial quote from Jonas Rapp is displayed, followed by his name and the text '– Jonas Rapp'. At the bottom, there's a quote about the tool's purpose and its creation, along with the copyright notice 'FetchXML Builder – empowering since 2014'.

FetchXML Builder

FetchXML Builder is currently used more than 3000 4000 5000 times EVERY DAY! Check out [the latest stats](#).

When *Stunnware Tools* was discontinued, I searched for a tool to create advanced FetchXML queries.

I didn't find any.

So, I created it.

– Jonas Rapp

Build queries for Microsoft Dataverse, Dynamics 35 and the Power Platform. Investigate data. Get code. Empower yourself to achieve more.

FetchXML Builder – empowering since 2014

TIME SAVER ALERT!

Use FetchXML Builder by Jonas Rapp in the XrmToolBox to get odata queries to enhance your Dataverse actions/triggers!

Power Apps

Objects

+ New Add existing Publish all customizations ...

Search

Environment Sales Trial

HN

Back to solutions

Fun with Dataverse Con...

Overview

Objects

History

Pipelines

All (10)

Apps (2)

Cards (0)

Chatbots (0)

Cloud flows (2)

Connection references (3)

Processes (1)

Site maps (1)

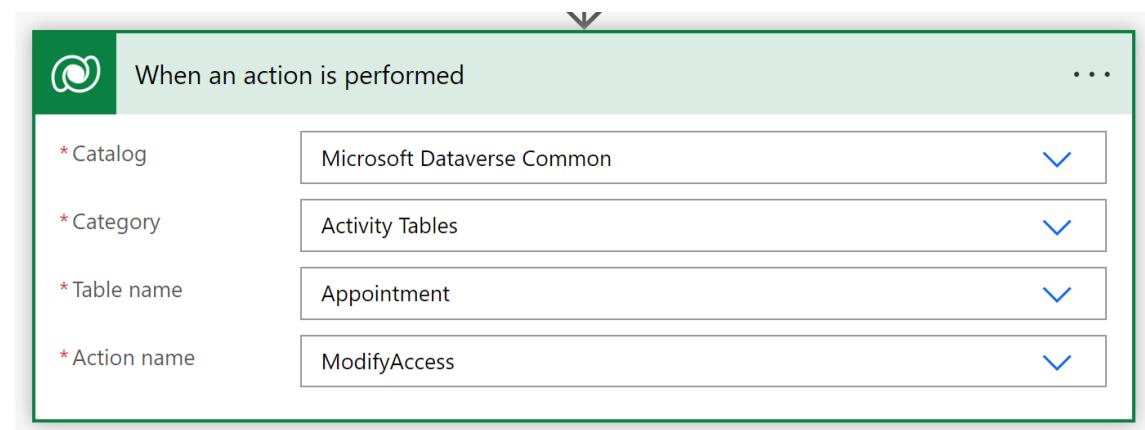
Tables (1)

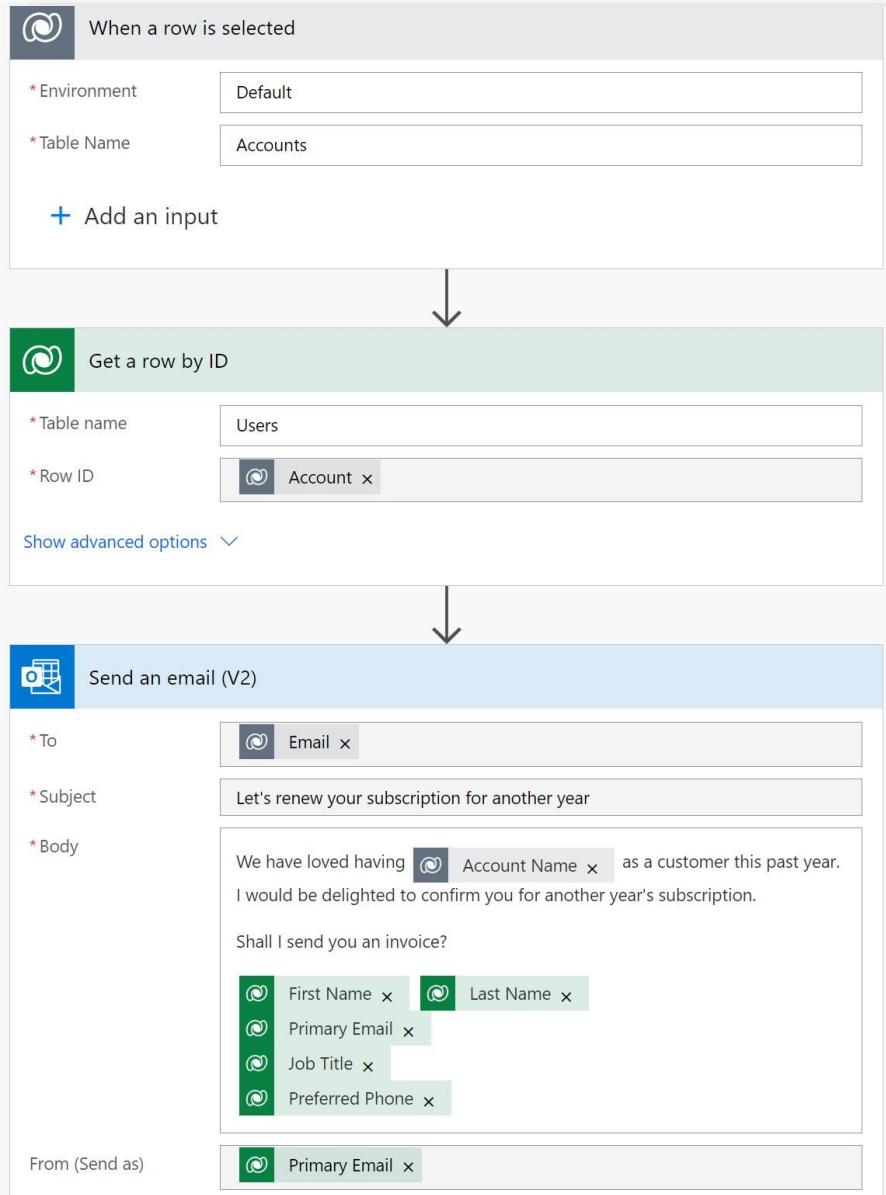
Fun with Dataverse Connectors > All

	Display name	Name	Type	Managed	Last Modified	Owner	Status
�	Approvals FunwithDataverseConnectors-48074	crmheidi_sharedapprovals_48074	Connection Reference	No	1 week ago	Heidi Neuhauser	Off
⠇	Launch Approval Process	Launch Approval Process	Cloud Flow	No	1 week ago	Heidi Neuhauser	On
⠇	Lead to Opportunity Sales Process	Lead to Opportunity Sales Process	Process (Business Process Flow)	Yes	1 week ago	SYSTEM	On
⠇	Lead To Opportunity Sales Process	leadtoopportunitysalesprocess	Table	Yes	2 weeks ago	-	
⠇	Microsoft Dataverse FunwithDataverseConnect...	crmheidi.sharedcommondataserviceforapps.ace32	Connection Reference	No	1 week ago	Heidi Neuhauser	Off
⠇	Microsoft Teams FunwithDataverseConnectors...	crmheidi_sharedteams_be013	Connection Reference	No	1 week ago	Heidi Neuhauser	Off
⠇	Post Won Opportunities in Teams Channel	Post Won Opportunities in Teams Channel	Cloud Flow	No	1 week ago	Heidi Neuhauser	On
⠇	Sales Hub	msdynce_saleshub	Model-Driven App	Yes	2 weeks ago	-	On
⠇	Simple app	crmheidi_Simpleapp	Site Map	No	1 week ago	-	
⠇	Simple app	crmheidi_Simpleapp	Model-Driven App	No	1 week ago	-	On

When an action is performed

1. Select a **Catalog**.
 - (ALL)
 - Cxp
 - Insights Applications Platform
 - Microsoft Dataverse Common
 - Custom value
 2. Pick a **Category** based on your Catalog selection.
 3. Choose from **Table Name**, based on your Category selection.
 4. Choose an **Action Name** from the list.
- Use with Plugin Registration Tool for event-driven actions
 - Used with Dataverse actions: Perform a bound action, Perform an unbound action.





When a row is selected (Dataverse Legacy)

Trigger a flow when a row is selected from the Flow menu in the command bar.

Use with Instant Cloud Flow.

Example: Select an account in Dynamics 365 CRM and send an email asking to renew their annual subscription.

In Power Automate Starter Kit as **Send Email when Account is Selected**



+ New ▾ Add existing ▾ Publish all customizations ...

Summit Test > All



Display name ↑ ▾

Name ▾

Type ▾

Managed ▾



Account



account

Table

Yes

Deep Dive into the Dataverse Connector Actions

UPDATE CRM/CE RECORDS WHEN THINGS HAPPEN OUTSIDE OF
DYNAMICS 365 USING ACTIONS.

Dataverse Actions

Add a new row

- Add a new row of data on a table

Download a file or image

- Download file/image content from a table in Dataverse

Get a row by ID

- Get a specific row that matches an ID in Dataverse

List rows

- List all rows in a table

Perform a background operation (preview)

- Perform background operations using Custom APIs

Perform a bound action

- Perform action associated with a selected table

Perform a changeset request

- Perform a group of operations as a single transaction

Delete a row

- Remove row of data from a table

Dataverse Actions

Relate rows

- Link a row in one table to another if they have 1:N or N:N relationship

Search rows (preview)

- Search an environment using Relevant Search & returns results

Upload a file or an image

- Upload image/file to a Dataverse table with compatible column type

Perform an unbound action

- Perform Dataverse actions available in the environment that are not associated with any table

Unrelate rows

- Remove link between a row in one table to another if they have 1:N or N:N relationship

Update a row

- Modify any selected row in table – or adds new row if it does not exist



Dataverse actions I use most

- Get a row by ID: use this action in a flow to get record details you can use in later steps.
- Update a row: use to take information and update a specific CRM record.
- Add a new row: use this to make a new CRM record.

Get the Power
Automate Starter Kit –
CRM/CE today!

[HTTPS://REENHANCED.COM/STARTERKIT](https://reenhanced.com/starterkit)



Dynamics 365 for Sales

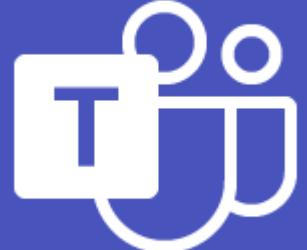
Great Power Automate Connectors for Sales

- 1.[Microsoft Teams](#)
- 2.[Approvals](#)
- 3.[Office 365 Outlook](#)
- 4.[Notifications / Power Apps Notification](#)
- 5.[Data8 Data Enrichment](#)
- 6.[Adobe Acrobat Sign](#)

Microsoft Teams

- 10 triggers
- 62 actions
- <https://www.connectorreview.com/#/c/teams>
- Use Case:

Every morning, a list of Won Opportunities should be posted in a Teams message as the Flow bot to a Sales channel.



Every day at 20:00

Feel free to update recurrence time and frequency to whatever makes the most sense for your organization.

Runs at 20:00 every day [Edit](#)

List all Won Opportunities from Today

Selects WON Opportunities from Yesterday. Add additional fields to display in the select columns area (use schema name!)

* Table name: Opportunities

Select columns: name, actualvalue, modifiedby

Filter rows: (Microsoft.Dynamics.CRM.Today(PropertyName='actualclosedate') and statecode eq 1)

Sort By: Columns to sort by in OData orderBy style (excluding lookups)

Expand Query: Enter an Odata style expand query to list related rows

Fetch Xml Query: Enter a Fetch XML query

Row count: Enter the number of rows to return

Skip token: Enter the skip token obtained from a previous run to list rows from the next page

Partition ID: An option to specify the partitionId while retrieving data for NoSQL tables

[Hide advanced options](#)

HINT: Use FetchXML Builder from the XrmToolBox to get your odata query in the trigger!

Take list and make a simple map showing Topic and Actual Revenue

Add additional fields as needed in the map.

* From: value

* Map:

Subject	Topic
Actual Revenue	Actual Revenue

Enter key: Enter value

Create a table using the map in the prior step

* From: Output

Show advanced options

Post a Teams message in the Sales channel

* Post as: Flow bot

* Post in: Channel

* Team: Sales

* Channel: General

* Message: Opportunities Won Today:

Output

Use Data Operation connector to create a table, then use the output in the Teams action.

Approvals



- No triggers
- 6 actions
- <https://www.connectorreview.com/#/c/approvals>
- Use Case:

When a Quote is Activated in CRM, start an approval. When approved, send email to Quote Owner. If rejected, email feedback to Quote Owner.

Office 365 Outlook



- 25 triggers
- 79 actions
- <https://www.connectorreview.com/#/c/office365>
- Note: this connector is preferred for work accounts over the Outlook.com connector which has 14 triggers and 38 actions.

In Power Automate Starter Kit as Request Approval When Quote Activated

When a Quote status is moved to Active

Includes select columns for status and status reason and a filter row query (built from the FetchXML builder from the XrmToolBox) to only look for Quotes when they have a status reason of Active.

* Change type: Modified

* Table name: Quotes

* Scope: Organization

Select columns: statecode, statuscode

Filter rows: (statecode eq 1)

HINT: Use FetchXML Builder from the XrmToolBox to get your odata query in the trigger!

Get Details about Owner of Quote

This action will be used in the email step below.

* Table name: Users

* Row ID: Owner (Value) x

Get details about Account on Quote

This action is hard-coded to look up only Accounts listed in the Potential Customer field. If you are using Contacts, you'll want to switch the table name here and select Potential Customer from your trigger step as your Row ID.

* Table name: Accounts

* Row ID: Potential Custo... x

Create URL to access Quote in CRM

Here, we are copying the URL to a record in our CRM system (be sure you pick the proper model-driven app). Remove the Quote ID from the URL string and replace it with dynamic content for the unique identifier of the Quote.

* Inputs: https://reenhanceddev.crm.dynamics.com/main.aspx?appid=fa78a168-5ab9-e911-a85c-000d3a537884&pagetype=entityrecord&etn=quote&id=

Quote x

Start and wait for an approval

This uses first to respond. Update as you see fit for your use case.

* Approval type: Approve/Reject - First to respond

* Title: Approval request for Quote: Account Name x

* Assigned to: heidi@reenhanced.com;

Details: Quote Value: Total Amount ... x, Quote #: Quote ID x, Customer: Account Name x, Sales Rep: Owner (Value) x

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Show advanced options

Condition

This conditional will provide different actions based on the Outcome of the Approval. When Approved, it will follow the YES branch. Any other outcome will follow the NO branch.

Outcome x is equal to Approve

+ Add

Handy Tip! You can create a URL to a CRM record using the Data Operation Connector's Compose action

BUT

this URL is model-driven app specific.

If yes

 Get Comments from Approval and email Quote Owner 

The Apply to Each will get the response from the Approval and include it within the email message. 

*Select an output from previous steps
 Responses 

 Email Quote Approval Details  

This email is sent to the Quote Owner letting them know the outcome of their approval. 

*To:  Primary Email 

*Subject: Quote approved for  Account Name 

*Body:

Font  12                                       <img alt="Text transform icon" data-bbox="7328 481 7

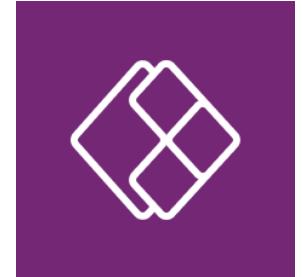
Notifications



- No triggers
- 2 actions
- <https://www.connectorreview.com/#/c/flowpush>
- Use Case:

Receive email notifications or email notifications to your Flow mobile app.

Power Apps Notification

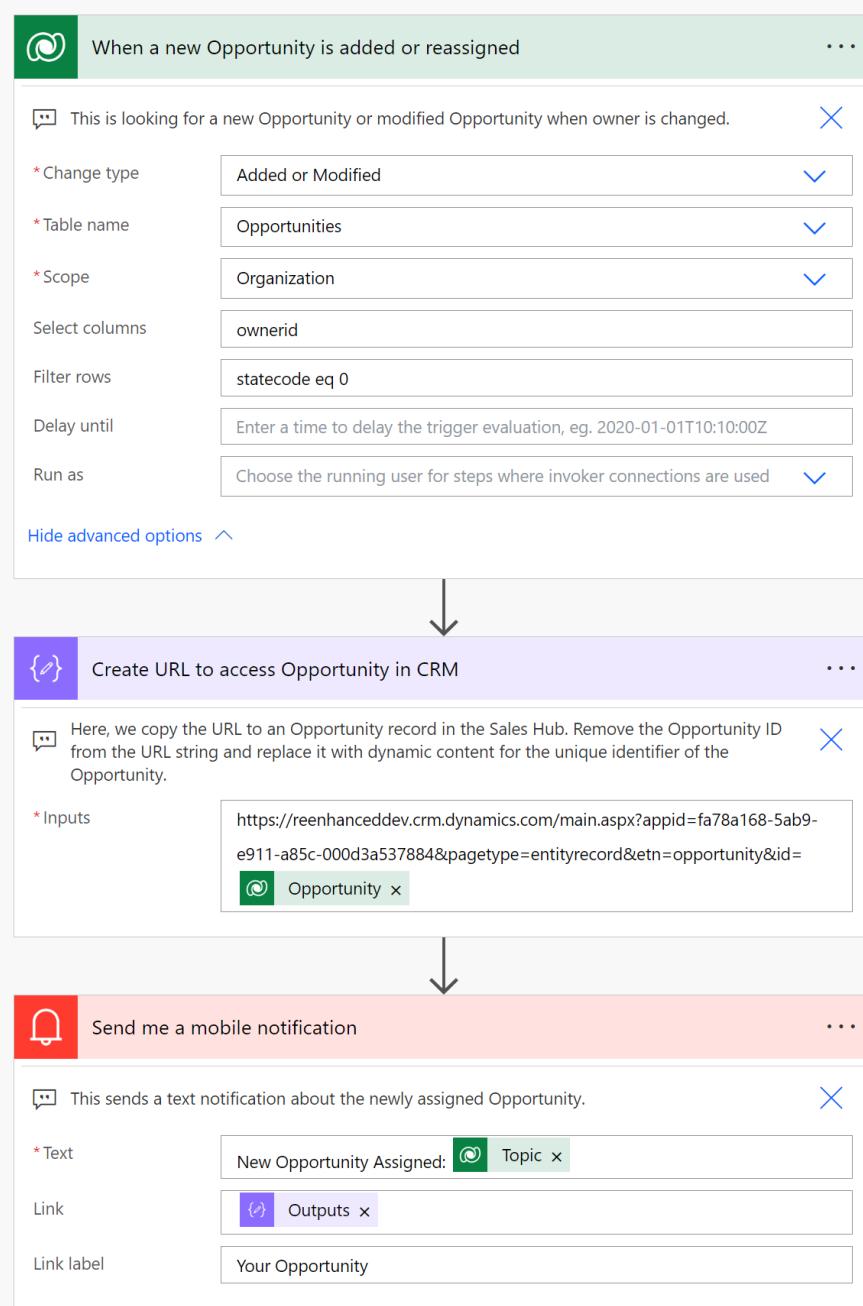


- No triggers
- 1 action
- <https://www.connectorreview.com/#/c/powerappsnotification>
- Use Case:

Send a push notification to a specified Power App.

NOTE: V2 of this will send a push notification to the Sales app. Use it with the sales hub. If you have a custom model-driven app use V1.

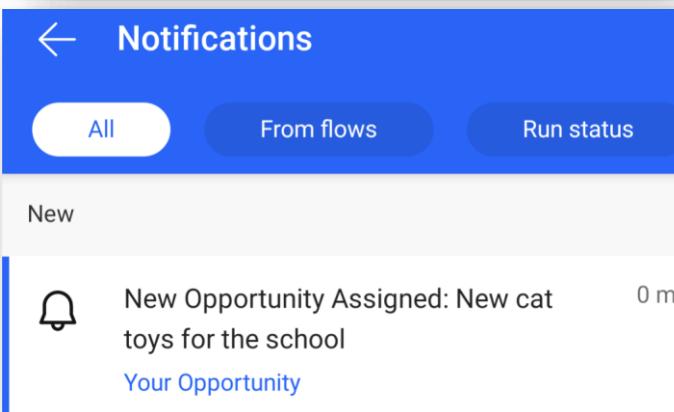
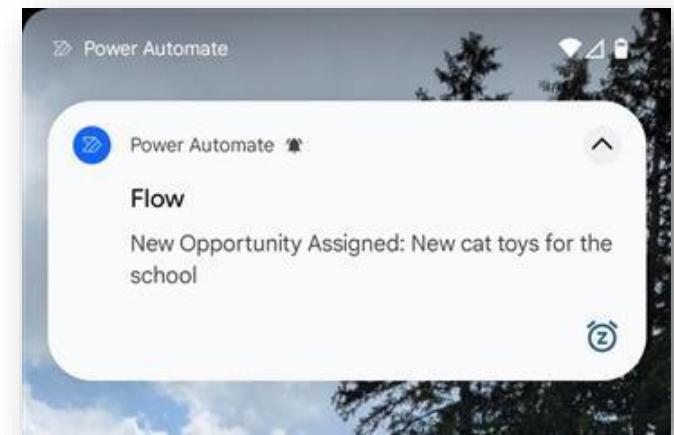
In Power Automate Starter Kit as Send Notification when new Opportunity is assigned



Use select columns **ownerid** and Filter rows **statecode eq 0**:

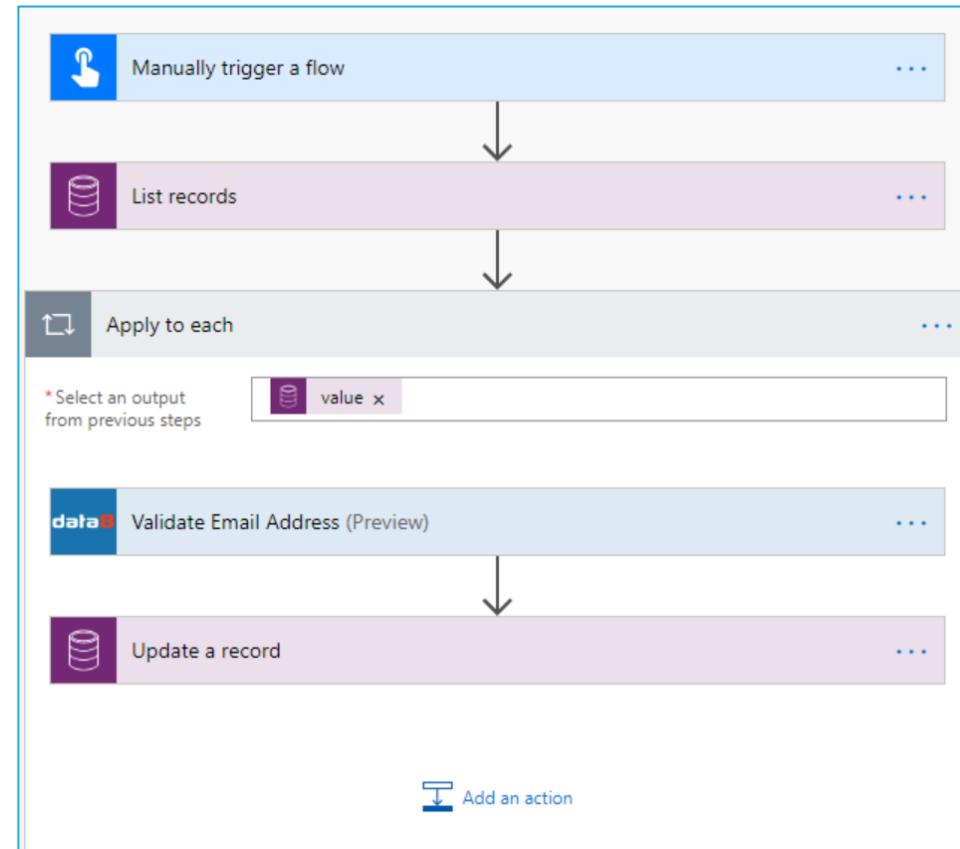
This runs the flow when Owner ID changes, and looks only for OPEN Opportunities.

Use Data Operation connector to create the URL to access the record in CRM.



Data8

- No triggers
- 12 actions
- <https://www.connectorreview.com/#/c/data8>
- Use for data cleansing and enrichment
- Example:
Select D365 records and validate email address and/or phone number.





Adobe Acrobat Sign

- 6 triggers
- 31 actions
- <https://www.connectorreview.com/#/c/adobesign>
- Automate your document signing
- Triggered flow example: **When the state of an agreement changes**, specify Event to be “When an agreement workflow is completed successfully” and automate next steps with billing to invoice the customer.
- Great action example: When a document has been added to a specific SharePoint library, use the **Create an agreement from an uploaded document and send for signature**.

When the state of an agreement changes (Preview)

* Name
The name of the trigger

* Scope
The scope of the trigger

* Events - 1

+ Add new item

Agreement Name/ID
Specify only when "Scope" is "A specific agreement". Select an agreement from the dropdown or ...

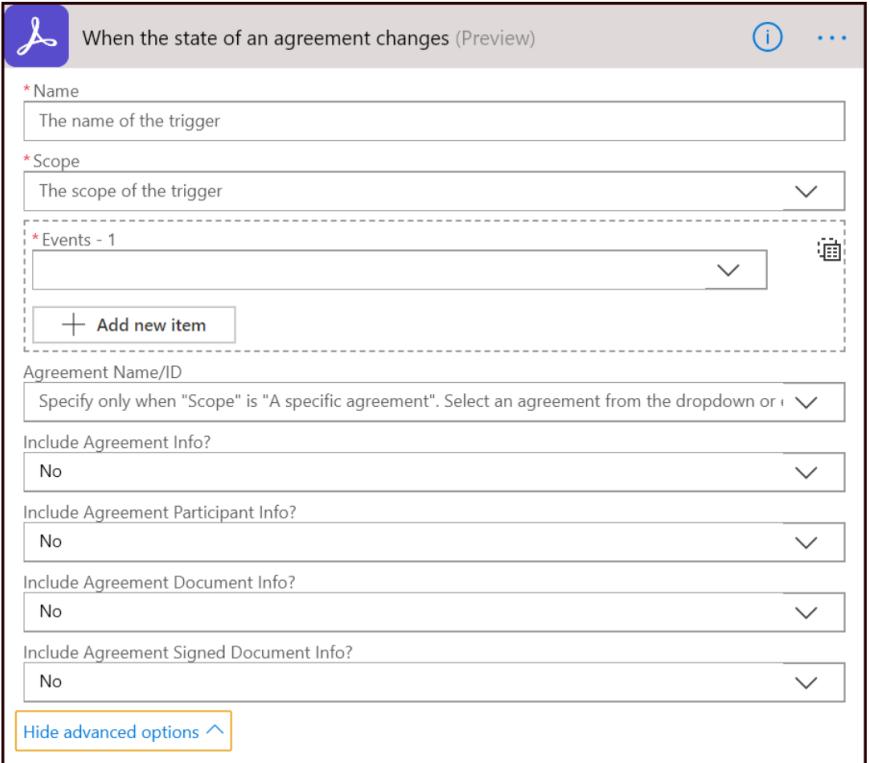
Include Agreement Info?
No

Include Agreement Participant Info?
No

Include Agreement Document Info?
No

Include Agreement Signed Document Info?
No

Hide advanced options ^



Create an agreement from a document URL and send for signature

* Agreement Name
The name of the agreement

* Document URL - 1
A publicly accessible URL for retrieving the raw file content

* Document Name - 1
The original system file name of the document being sent

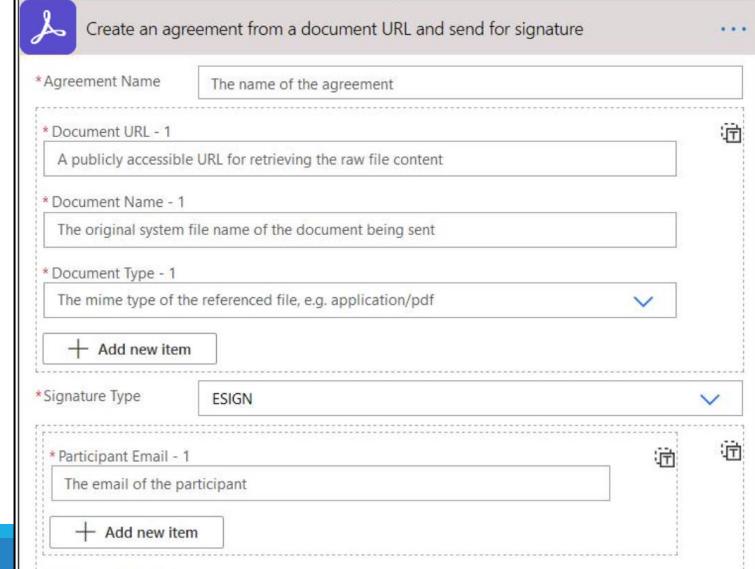
* Document Type - 1
The mime type of the referenced file, e.g. application/pdf

+ Add new item

* Signature Type
ESIGN

* Participant Email - 1
The email of the participant

+ Add new item





Dynamics 365 for Customer Insights - Journeys

Great Power Automate Connectors for Customer Insights - Journeys

Forms

- Microsoft Forms
- WordPress
 - Gravity Forms
 - Power Form 7

Marketing Automation & Email

- MailChimp
- Hubspot Marketing (Independent Publisher)

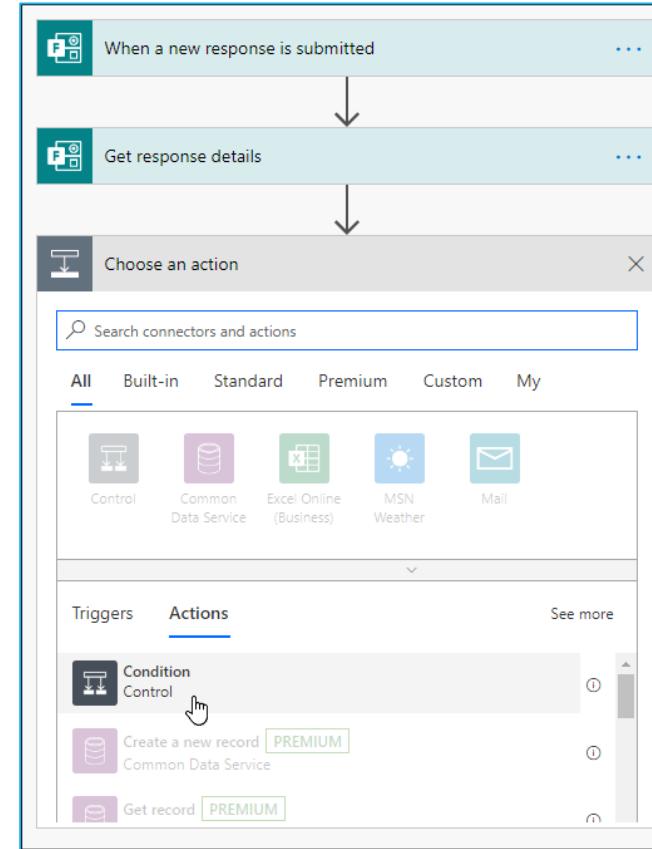
SMS outside of Customer Insights - Journeys

- TxtSync

Microsoft Forms



- 2 triggers
- 1 action
- <https://www.connectorreview.com/#/c/microsoftforms>



Gravity Forms

- 1 trigger
- No actions
- <https://www.connectorreview.com/#/c/gravityformsbyreenhanced>
- Example: When a form is submitted, create a new Lead in Dynamics 365.

The screenshot shows the Gravity Forms interface. At the top, a trigger is defined: "When a form is submitted (Preview)" for the "Dynamics 365 Rescue form [reenhanced (reenhanced.com)]". Below this, a form is being built to add a new lead. The form fields include:

- * Table name: Leads
- * Last Name: Name (Last)
- * Topic: New Lead: Name (First) and Name (Last)
- Budget Amount: Information about the budget amount of the lead's company or organization.
- Business Card: Stores Image of the Business Card
- Company Name: Type the name of the company associated with the lead. This becomes the accc
- Description: Type additional information to describe the lead, such as an excerpt from the cc
- Email: Email
- First Name: Name (First)
- Job Title: Type the job title of the primary contact for this lead to make sure the prospect
- Lead Source: Web

In Power Automate Starter Kit as Create Lead in Dataverse from Gravity Forms

The screenshot shows a Power Automate flow starting with a "When Contact form is submitted" trigger. This triggers a "List all leads where email address in form equals email address in Dataverse" action. A note in this step explains that it looks for duplicates and updates existing entries instead of creating new ones. Below this is a "For each matching lead" loop. Inside the loop, the "If email in form is found in Leads already" condition checks if the submitted email matches any existing lead's email. If "yes", it triggers an "Update the existing lead in CRM" action, which updates the lead with the new form submission information. If "no", it triggers an "Add a new lead in CRM" action, which creates a new lead entry. The "Update the existing lead in CRM" and "Add a new lead in CRM" actions share many fields, such as Table name (Leads), Topic (New Lead: Name (First) and Name (Last)), and various contact details like First Name, Last Name, and Email.

We use this **List rows** action to check for email addresses before adding a new Lead.

BONUS: Gravity Forms is powering the sending of the Power Automate Starter Kit to all of you!

When a form is submitted

* Form Power Automate Starter Kit - CRM [reenhanced (reenhanced.com)]

↓

Send an email (V2)

* To Email (Enter E...) Heidi Neuhauser

* Subject Your Power Automate Starter Kit is Here

* Body

Hi  body/2.3 !

Thank you for requesting the Power Automate Starter Kit for Dynamics 365 CE/CRM. And thank you for attending my session.

You can download the full kit here: [Power Automate Starter Kit for CE/CRM](#). This link is valid through the end of October. If you have any questions as you go through the kit, feel free to reach out.

And I invite you to stay in touch! Here's where you can find me and my content if you are interested in learning more:

- [LinkedIn](#)
- [Twitter](#)
- [www.crmheidi.com](#)
- [My YouTube channel](#)

Heidi Neuhauser
heidi@reenhanced.com

Show advanced options ▾

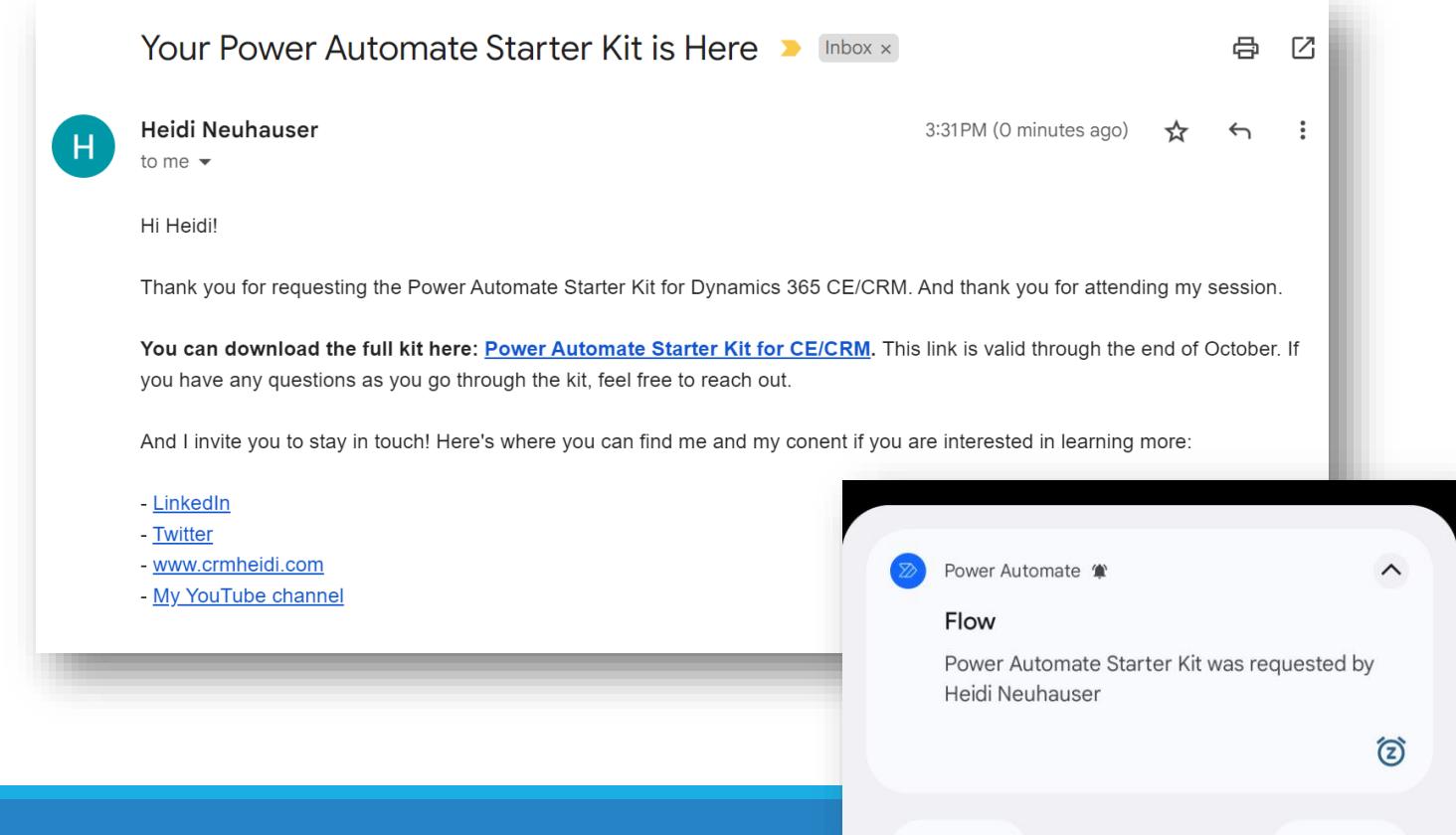
↓

Send me a mobile notification

* Text Power Automate Starter Kit was requested by  Name (First) x

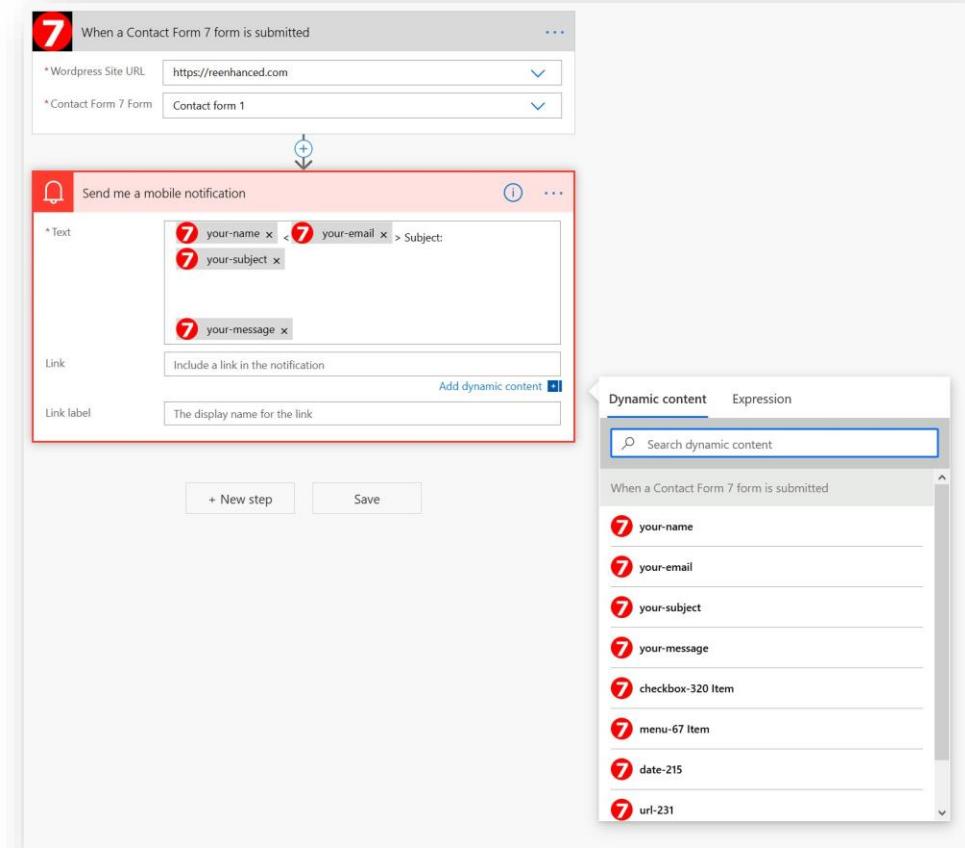
Name (Last) x

Link Include a link in the notification



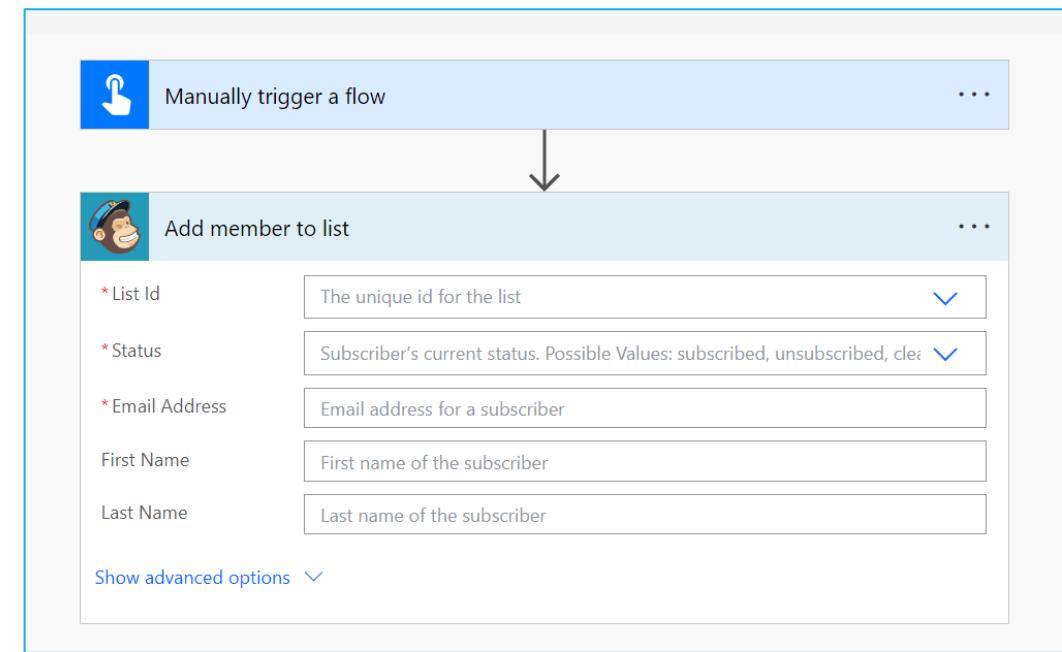
Power Form 7

- Connector for WordPress Contact Form 7 forms
- 1 trigger
- 2 actions
- <https://www.connectorreview.com/#/c/powerform7>
- Use case: Connect form data to your CRM and kick off other automated processes.



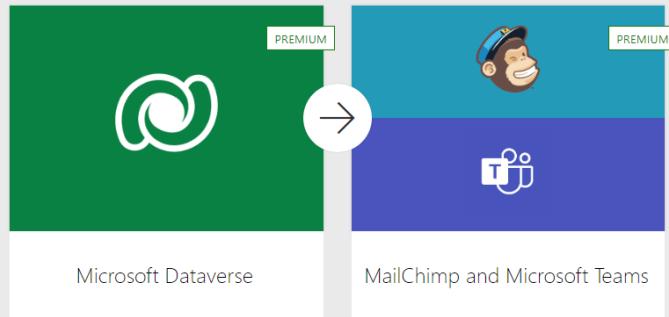
MailChimp

- 2 triggers
- 11 actions
- <https://www.connectorreview.com/#/c/mailchimp>
- Example: Sync Dataverse record to MailChimp
- This is a Power Automate template published and free to use! It's a good starting point and [you should check it out here.](#)



This is a Power Automate template you can access for free!

Sync Microsoft Dataverse record to Mailchimp



When a new Microsoft Dataverse row is added, sync that record to Mailchimp if a contact record. Send a notification in Teams that a new audience member has been added in Mailchimp.

* Microsoft Dataverse Table name
Contacts

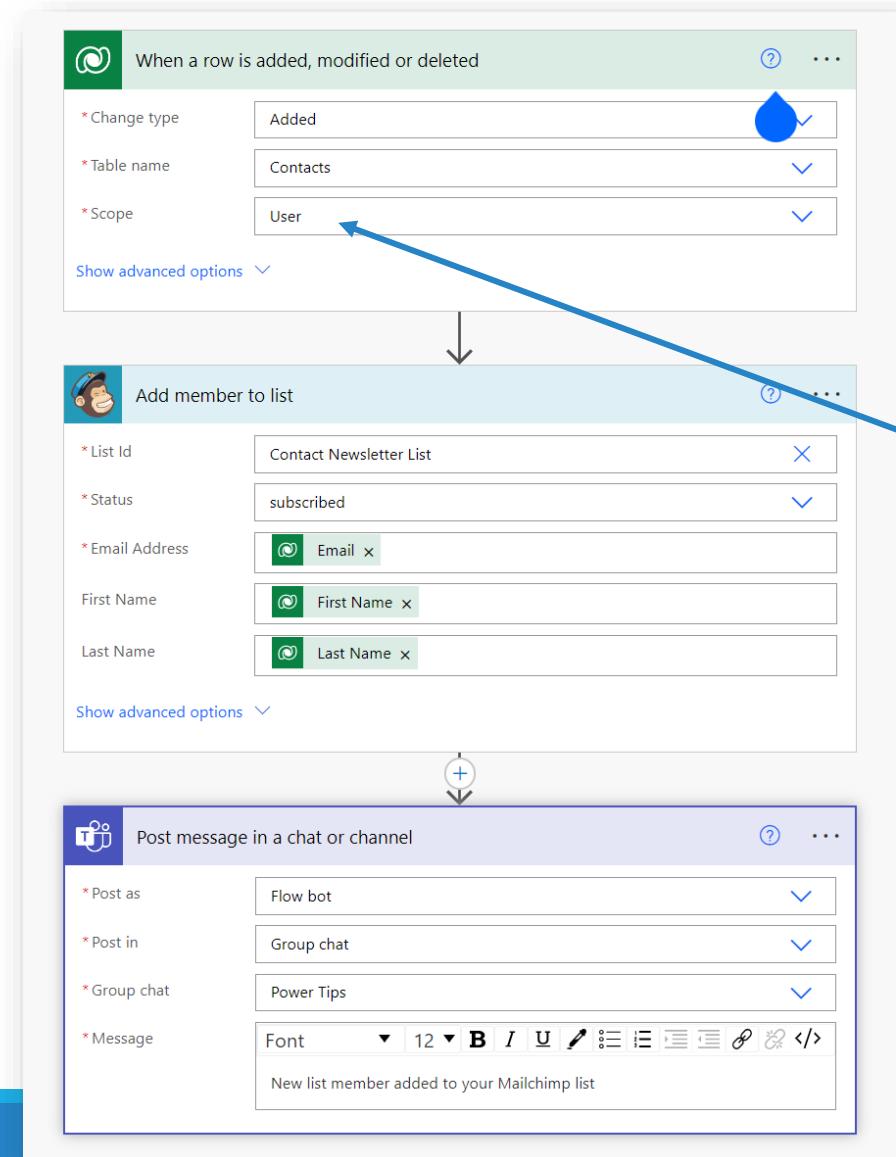
* MailChimp List Id
Contact Newsletter List

* MailChimp Status
subscribed

* Microsoft Teams Group chat
Select an item

[Edit in advanced mode](#)

[Create](#)



HubSpot Marketing (Independent Publisher)

- No triggers
- 14 actions
- <https://www.connectorreview.com/#/c/hubspotmarketing>
- Connector focused around forms and emails.
- Use case: A specified action happens in CRM, then use these actions to send an email.

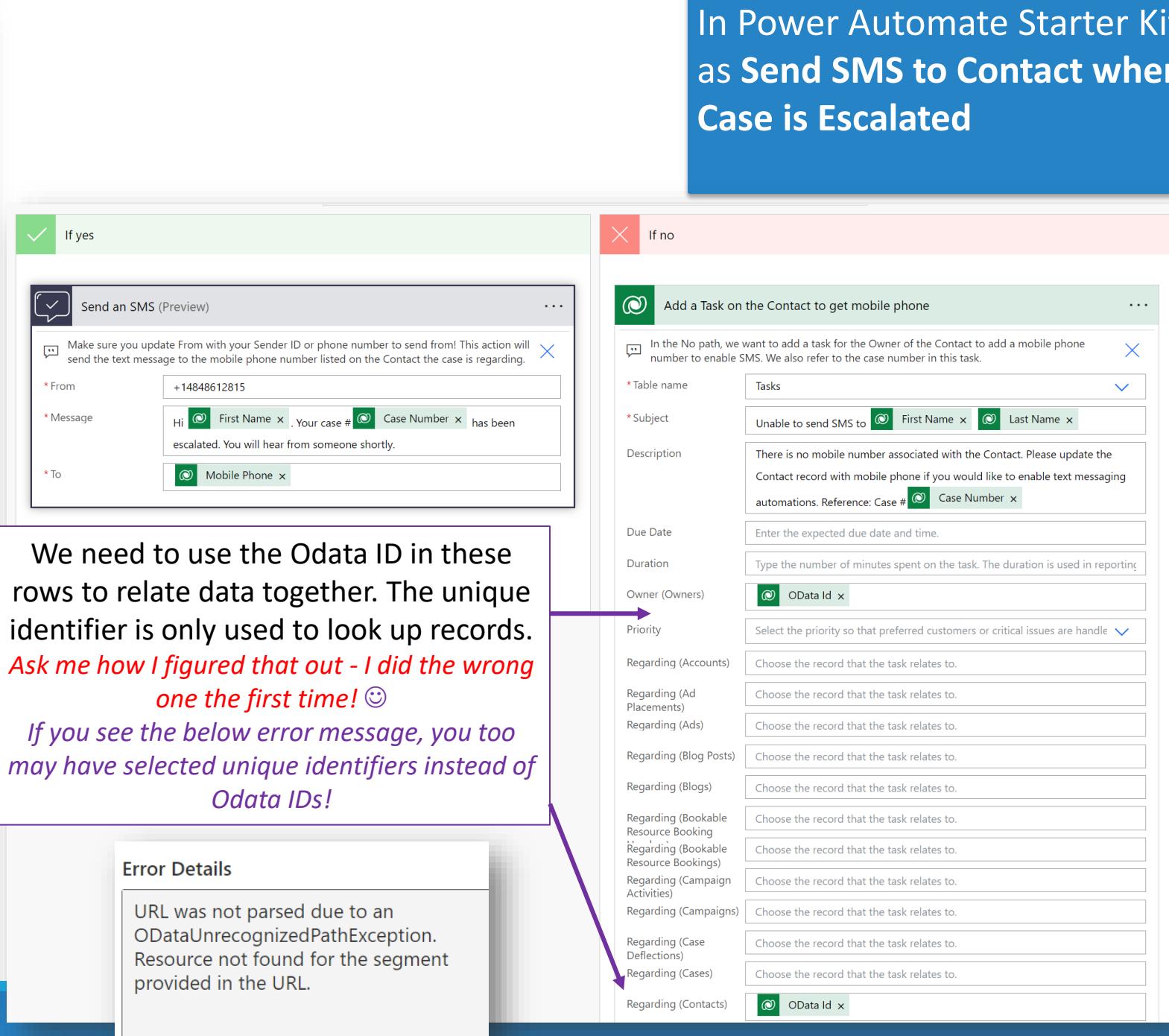
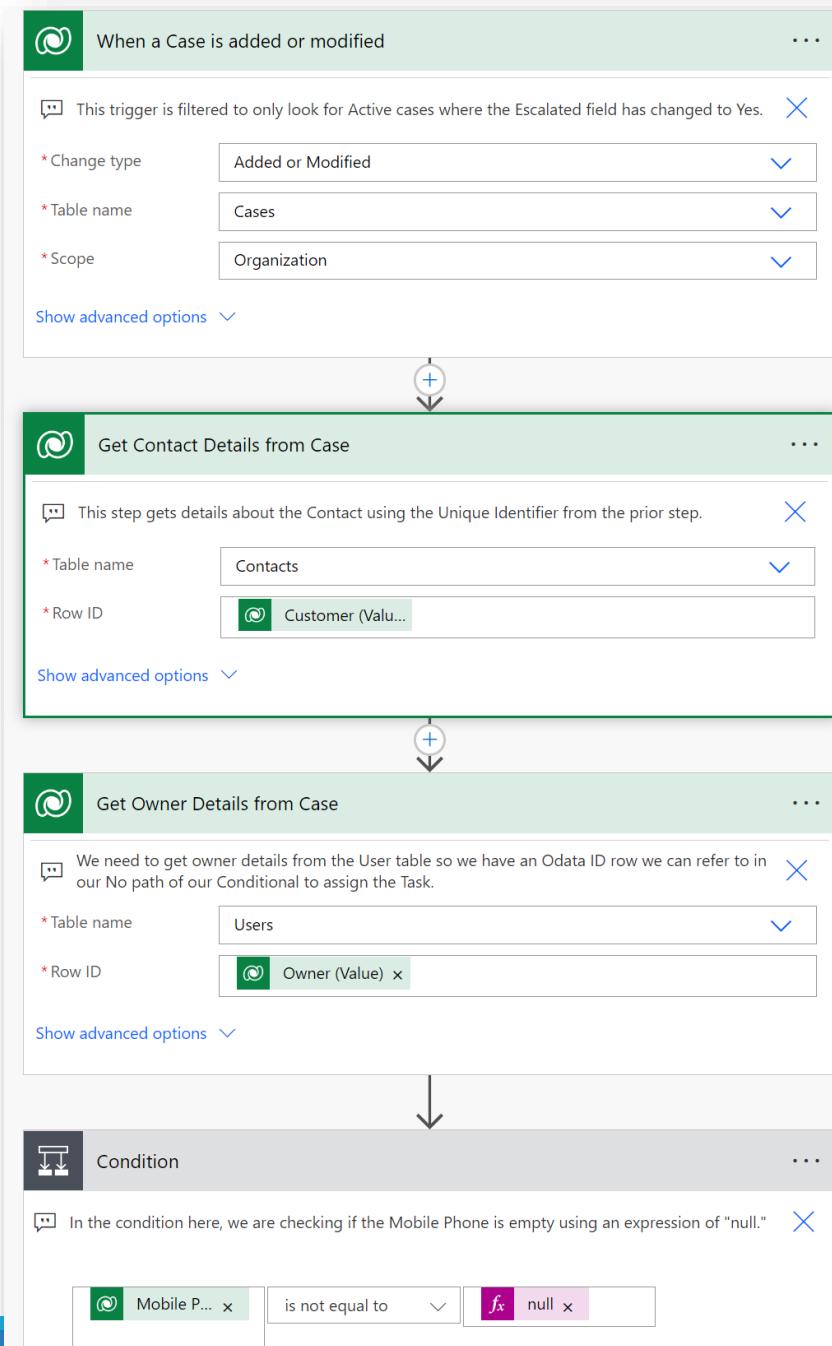


BONUS CONNECTOR! TxtSync if you SMS outside of D365 Customer Insights - Journeys

- 2 triggers
- 9 actions
- <https://www.connectorreview.com/#/c/txtsync>
- Example: Send SMS to Contact when a case is escalated in Dynamics 365 CE/CRM.



In Power Automate Starter Kit as **Send SMS to Contact when Case is Escalated**





Dynamics 365 for Service

Great Power Automate Connectors for Service

Approvals	Surveys	Chat Bots	Ticket Tracking
	<ul style="list-style-type: none">• Nps.today• Dynamics 365 Customer Voice• SurveyMonkey	<ul style="list-style-type: none">• Power Virtual Agents	<ul style="list-style-type: none">• Jira• Zendesk• Freshdesk

Approvals



- No triggers
- 6 actions
- <https://www.connectorreview.com/#/c/approvals>
- Use Case:
Send approval and follow up via Teams.
- [Get this Power Automate template here.](#)

Microsoft Power Automate template

The screenshot shows a Microsoft Power Automate template card. At the top, it says "Microsoft Power Automate template". Below that is a blue header bar with three small icons: a purple square with white dots, a blue shield-like icon, and a blue square with a white gear. The main title is "Send approval and follow up via Teams" by "By Microsoft Power Automate Community". A description below reads: "Simple flow enables you to trigger an approval requests and notify the requester in Microsoft Teams with an Adaptive Card." It indicates the flow is "Instant" and has been viewed 10190 times. A blue button at the bottom right says "Try it now".

PowerApps (V2)

RequesterEmail Please enter Requester e-mail address

ApproverEmail Please enter Approver e-mail address

Approval Title Please enter your Approval Title Request

+ Add an input

Start an approval

- * Approval type: Approve/Reject - First to respond
- * Title: Approval Title
- * Assigned to: ApproverEmail
- 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 ▾

Condition

Response is equal to Approve

+ Add ▾

If yes

Post adaptive card in a chat or channel

* Post as: Flow bot

* Post in: Chat with Flow bot

* Recipient: RequesterEmail

* Adaptive Card:

```
{
  "type": "AdaptiveCard",
  "body": [
    {
      "type": "ColumnSet",
      "columns": [
        {
          "type": "Column",
          "width": "auto",
          "items": [
            {
              "type": "ImageSet",
              "images": [
                {
                  "type": "Image",
                  "size": "Medium",
                  "url": "data:image/png;base64,iVBORw0KGgoAAAANSUhEUgAAAMAAAAADACAYAAA"
                }
              ]
            }
          ]
        }
      ]
    }
  ]
}
```

If no

Post adaptive card in a chat or channel 2

* Post as: Flow bot

* Post in: Chat with Flow bot

* Recipient: RequesterEmail

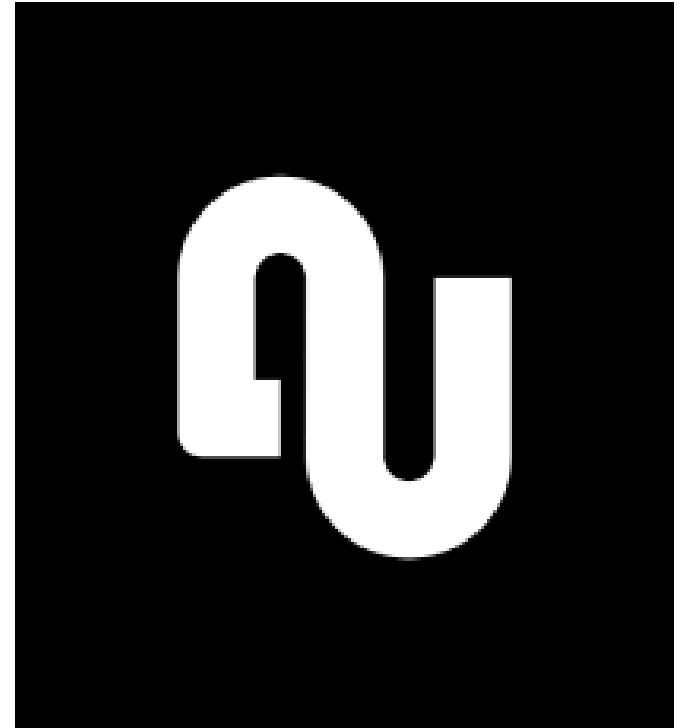
* Adaptive Card:

```
{
  "type": "AdaptiveCard",
  "body": [
    {
      "type": "ColumnSet",
      "columns": [
        {
          "type": "Column",
          "width": "auto",
          "items": [
            {
              "type": "ImageSet",
              "images": [
                {
                  "type": "Image",
                  "size": "Medium",
                  "url": "data:image/png;base64,iVBORw0KGgoAAAANSUhEUgAAAMAAAAADACAYAAA"
                }
              ]
            }
          ]
        }
      ]
    }
  ]
}
```

This is a Power Automate template you can access for free!

Nps.today

- 2 triggers
- 2 actions
- <https://www.connectorreview.com/#/c/npstoday>
- Use cases:
 - Kick off a flow when any new response is received or when a member is added to a campaign.
 - Use the actions to add employees or send surveys.





Dynamics 365 Customer Voice

- No triggers
- 2 actions: create invitation, send survey
- <https://www.connectorreview.com/#/c/microsoftformspro>
- Use case: Send patient service center satisfaction survey
- [Get the Power Automate template here.](#)

Send a patient service center satisfaction survey (Healthcare)

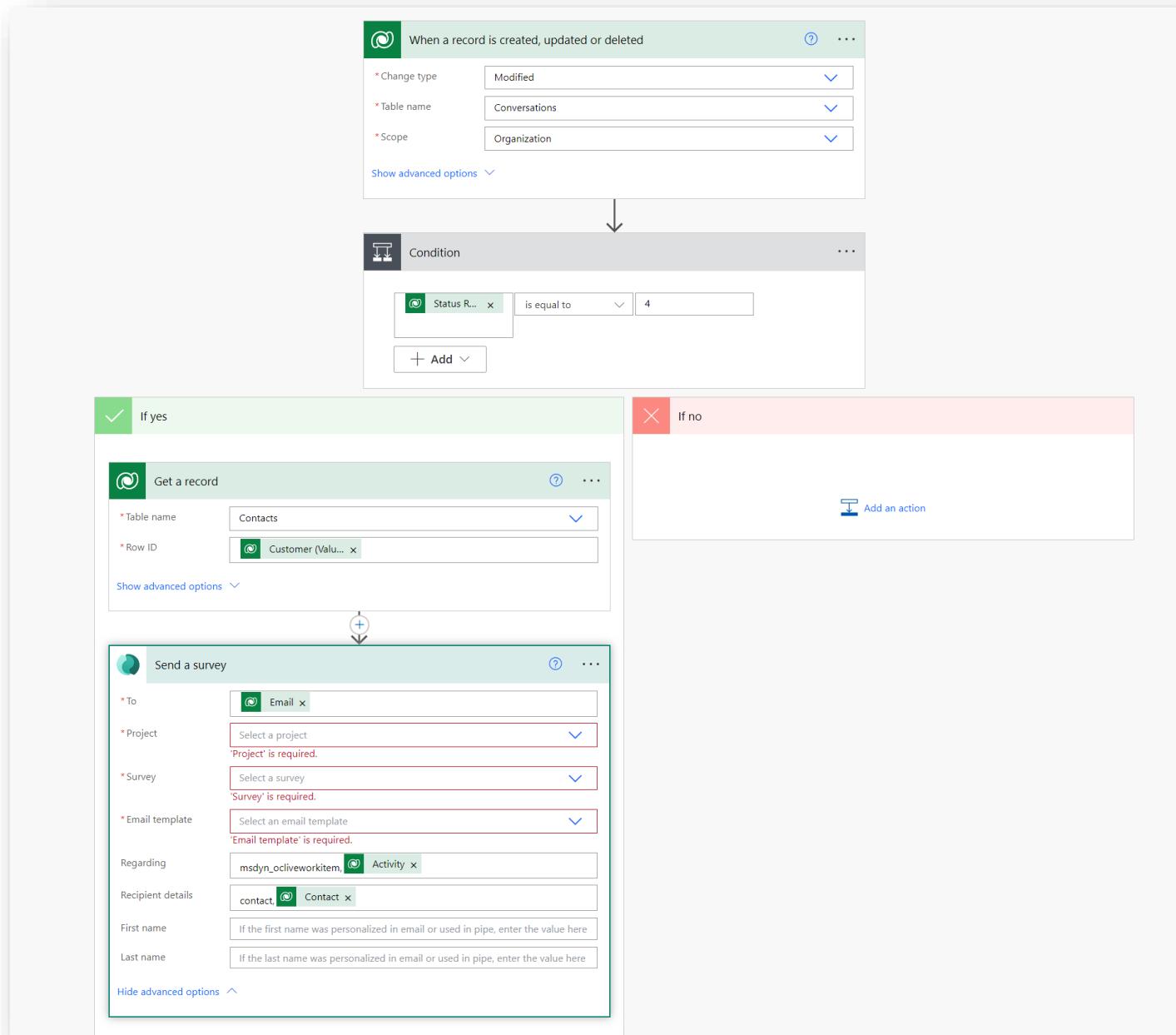
Microsoft Cloud for Healthcare template to send out a Customer Voice survey to patients/contacts that have had an interaction with the Patient Service Center to collect satisfaction metrics. This is part of the Healthcare solution for providers

This flow will connect to:

Microsoft Dataverse	heidi@reenhanced.com	<input checked="" type="checkbox"/>	...
Dynamics 365 Customer Voice	heidi@reenhanced.com	<input checked="" type="checkbox"/>	...

Continue

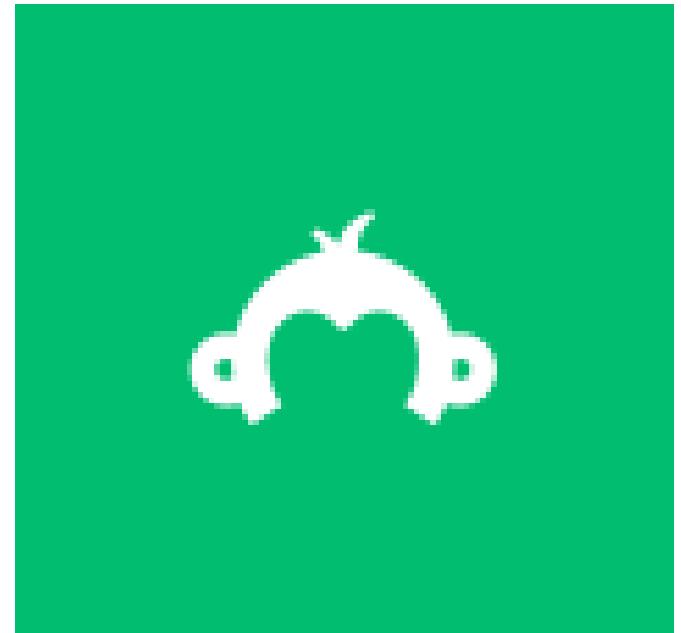
This is a Power Automate template you can access for free!



Survey Monkey

- 5 triggers
- 4 actions
- <https://www.connectorreview.com/#/c/surveymonkey>
- Use cases:
When a survey response comes in with low score or
mentions a specific key phrase, create a Case in Dynamics
365.

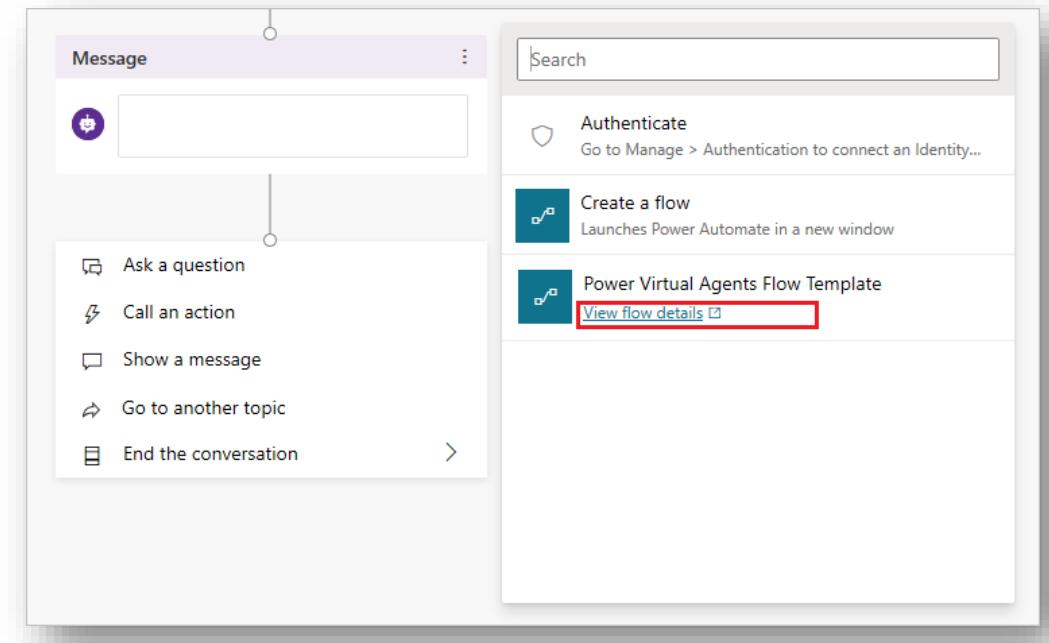
Select a Marketing list (or specific Contact) and send a
new Survey Monkey survey.



Power Virtual Agents



- 1 trigger
- No actions
- <https://www.connectorreview.com/#/c/powervirtualagents>
- This is the trigger you need to use if you want to call a flow in your bot.
- MS Documentation:
 - <https://learn.microsoft.com/en-us/power-virtual-agents/advanced-flow>
 - <https://learn.microsoft.com/en-us/power-virtual-agents/advanced-flow-create?source=recommendations>



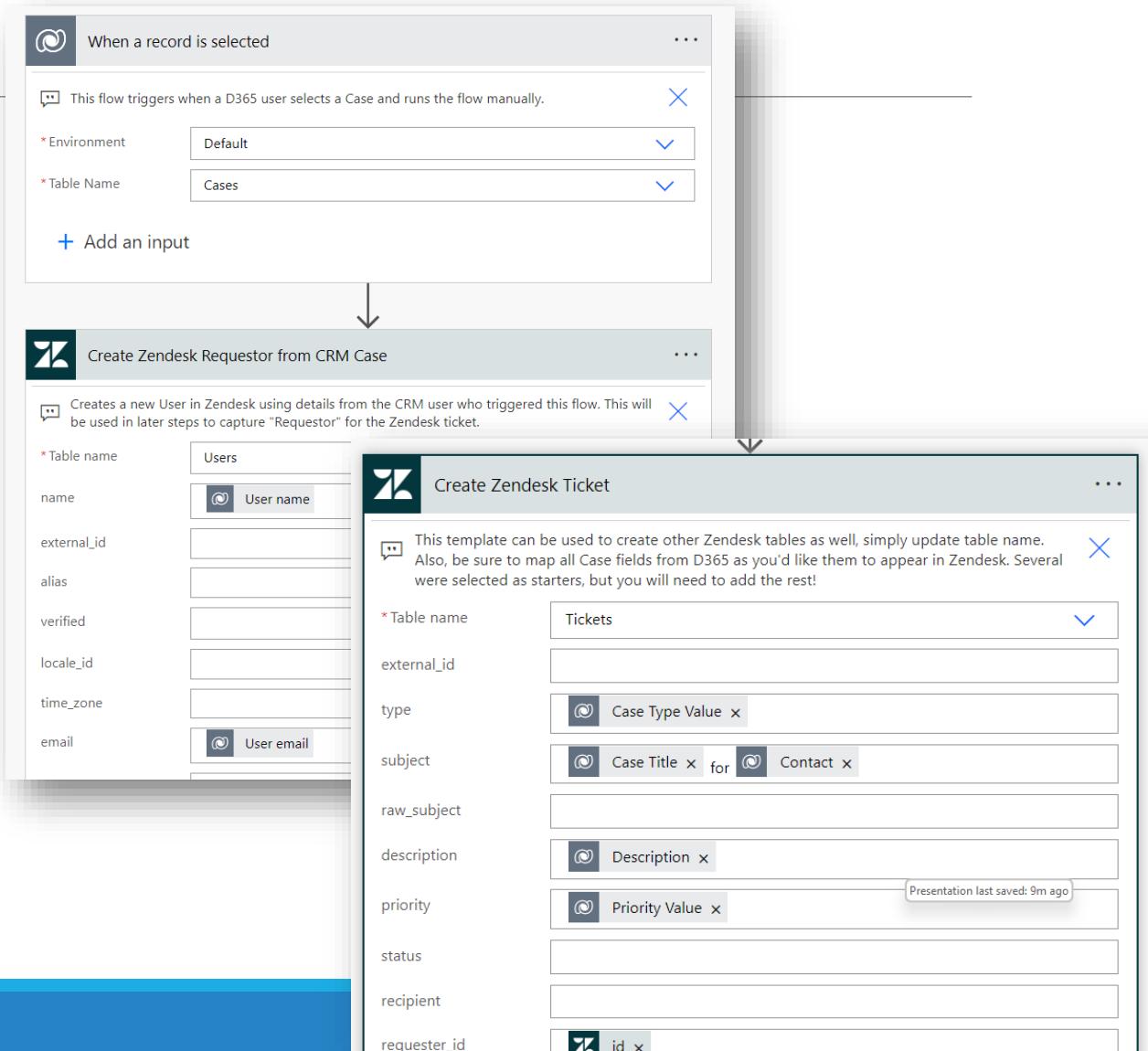
Jira

- 6 triggers
- 39 actions
- <https://www.connectorreview.com/#/c/jira>
- Use case:
 - Create an issue in Jira from SurveyMonkey/Microsoft Forms and start an approval, then push into Dynamics 365 as a case.



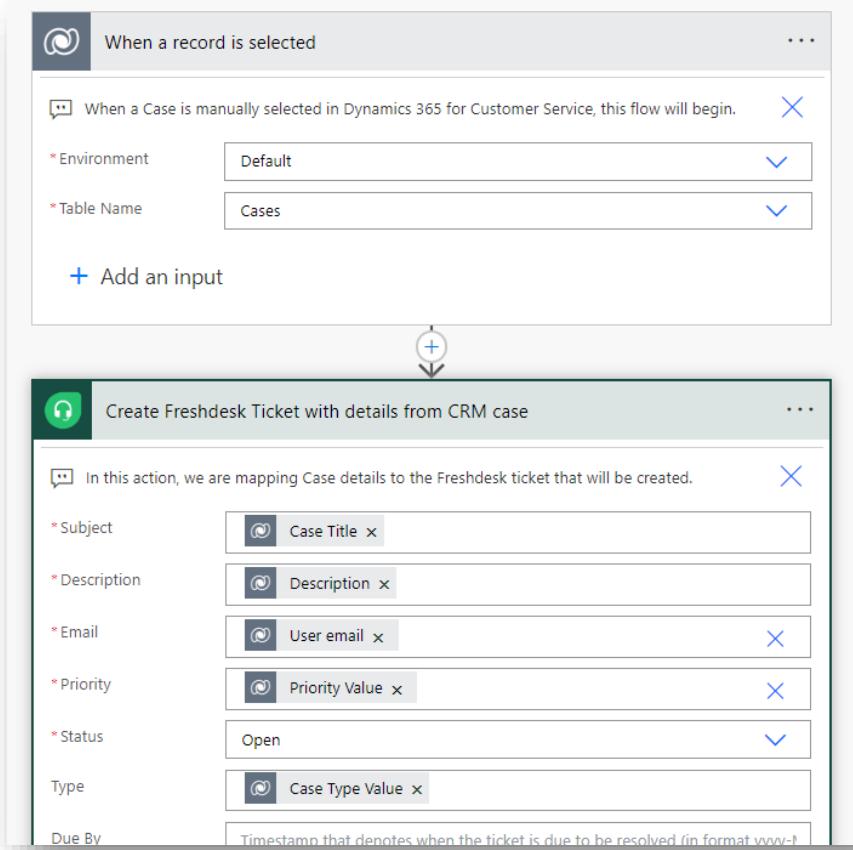
Zendesk

- 2 triggers
- 6 actions
- <https://www.connectorreview.com/#/c/zendesk>
- Use with Dataverse triggers to create or update Zendesk tickets.
- Use Zendesk triggers to create or update Dynamics 365 cases.



Freshdesk

- 6 triggers
- 4 actions
- <https://www.connectorreview.com/#/c/freshdesk>
- Use with Dataverse triggers to create or update Freshdesk tickets.
- Use Freshdesk triggers to create or update Dynamics 365 cases.



Get the Power
Automate Starter Kit –
CRM/CE today!

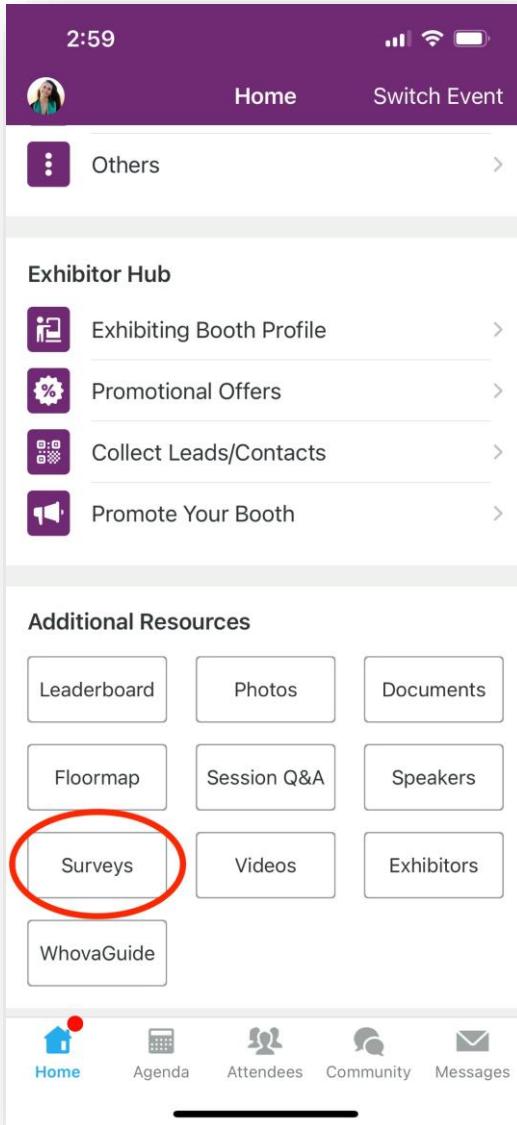
[HTTPS://REENHANCED.COM/STARTERKIT](https://reenhanced.com/starterkit)



Thank you!

HEIDI@REENHANCED.COM

WWW.CRMHEIDI.COM



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- Scroll down to find this session title.*
- Complete the session feedback survey.*
- Finally, click 'Submit'*

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