

Demo 3 - F&O and Flow

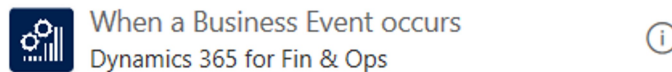
Tuesday, October 8, 2019 12:27 PM

Requirements:

- Azure subscription
- F&O subscription

1. Create a new flow:

- Go to <https://flow.microsoft.com> and sign in or create an account if you don't already have one.
- Go to My Flows > New > Automated from Blank > call it "FnOPostedInvoiceFlow" and select the following connector and trigger:



- If it's the first time you use this, it will ask you to enter your credentials for F&O.
- Select the appropriate environment and fill out the rest of the of the fields like this:

Category = Accounts Receivable
Business event = Free text invoice posted
Legal entity: USMF

A screenshot of the configuration form for the 'When a Business Event occurs' connector. The form has a light blue header with the connector icon and name. Below the header, there are four rows of configuration fields, each with a red asterisk indicating a required field. The fields are: 'Instance' with a dropdown menu showing 'fnointerfaceenvdemo400714ee58ed3767aos.cloudax.dynamics.com'; 'Category' with a dropdown menu showing 'Accounts receivable'; 'Business event' with a dropdown menu showing 'Free text invoice posted'; and 'Legal entity' with a dropdown menu showing 'USMF'. Each dropdown menu has a downward arrow icon on the right.

- Add a new step selecting the Office 365 Outlook connector and the Send an mail action.
- If it's the first time you use this, it will ask you to enter the credentials for the Office365 account you want to use to send the emails.
- Fill out the fields like this:

Send an email

*To

*Subject

*Body

Show advanced options

h. Save

2. Check the automatically created endpoint:

- a. Go to F&O and go to System Administration > Setup > Business Events > Business Events Catalog > Endpoints > you should see a new endpoint has been created, and that the "Free text invoice posted" business event under the "Accounts receivable" category is active:

Business events

Business event catalog Endpoints Active events Inactive events Errors

+ New Delete

Endpoint name ↑	Endpoint type
FlowEndpoint_{8CA6E756-9E78-4355-8616-8032C9749F8E}	Microsoft Flow
FlowEndpoint_{B271F1EC-C558-48DD-96B8-E2A605145553}	Microsoft Flow

FlowEndpoint_{8CA6E756-9E78-4355-8616-8032C9749F8E}

Microsoft Flow

Active business events

Category	Name
Accounts receivable	Free text invoice posted

3. Test the new endpoint:

- a. Create a free text invoice in F&O (Accounts Receivable > Invoices > All Text Invoices > New) and Post It.
- b. If all works well, you should have received the email now.