

Using Desktop Flows from Cloud Flows

Scenario

In this lab, you will build cloud flows which integrate with the desktop flows.

High-level lab objectives

Use child flows to create a more maintainable cloud flow

Use desktop flows from cloud flow

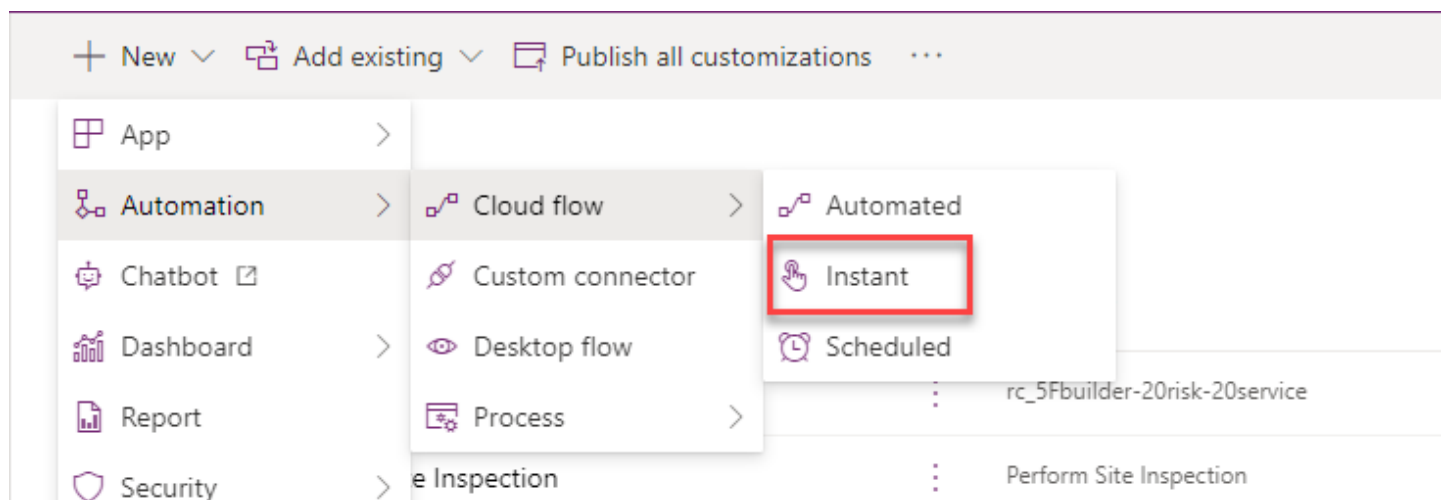
Exercise 1: Lookup Loan Child flow

Task 1: Create child flow

Navigate to <https://make.powerapps.com/> and make sure you are in the Dev environment.

Select **Solutions** and open the **Construction Funding** solution.

Click **+ New** and select **Automation | Cloud flow | Instant**.



Enter **CF Lookup Loan** for Flow name, select **Manually trigger a flow**, and click **Create**.







Build an instant cloud flow



Flow name

CF Lookup Loan

Choose how to trigger this flow *

- ☒  Manually trigger a flow
Flow button for mobile 
-  PowerApps
PowerApps 
-  When Power Virtual Agents calls a fl...
Power Virtual Agents 

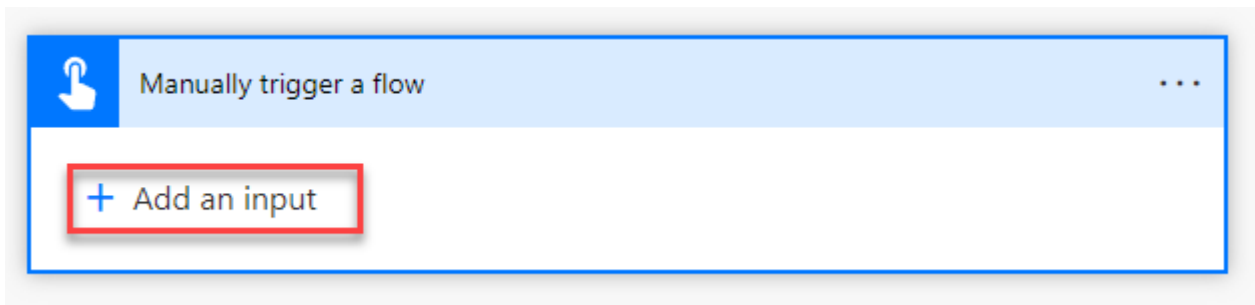
[Skip](#)

[Create](#)

[Cancel](#)

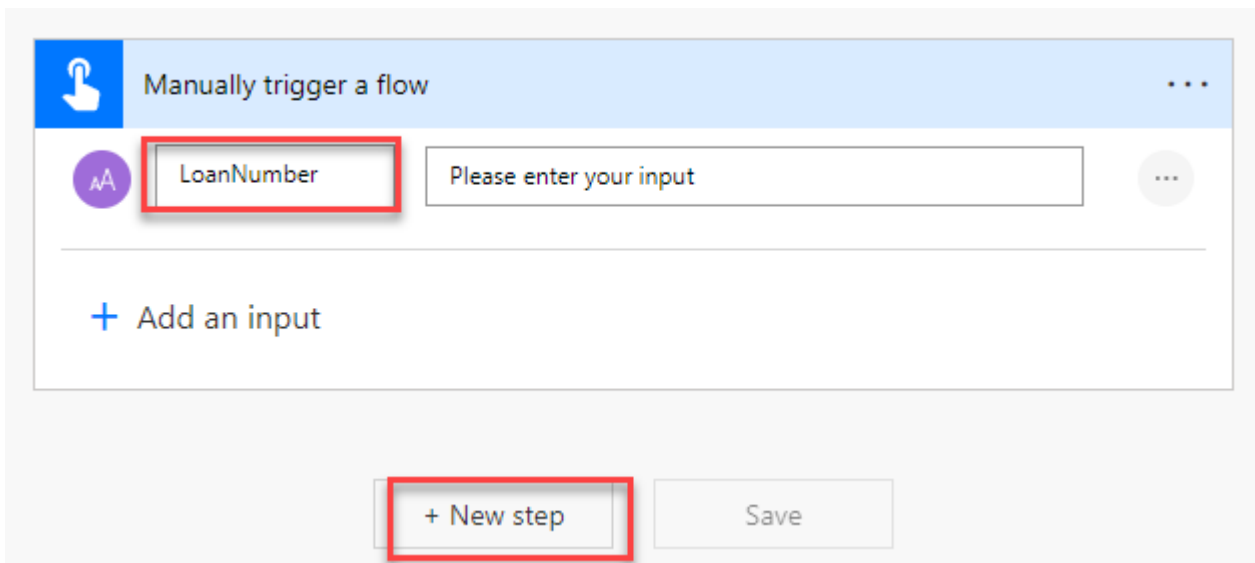
Expand the trigger by clicking on **Manually trigger a flow**.

Select **+ Add an input**.

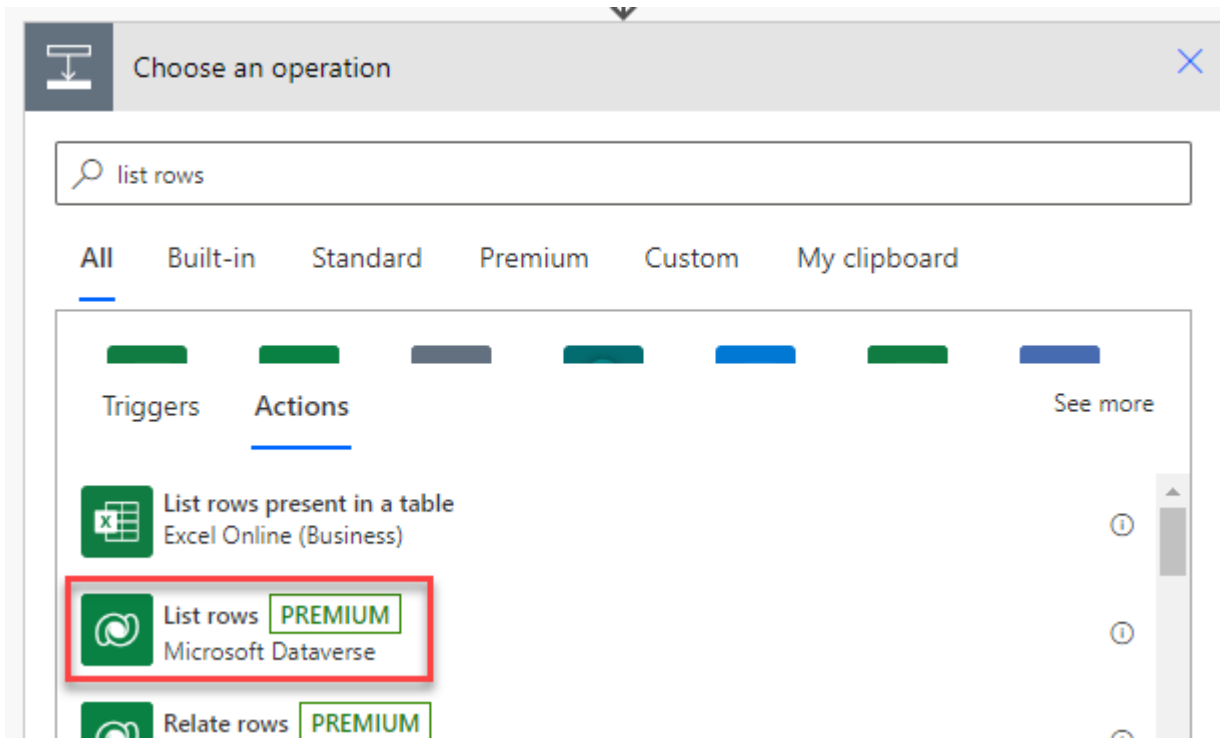


Select **Text**.

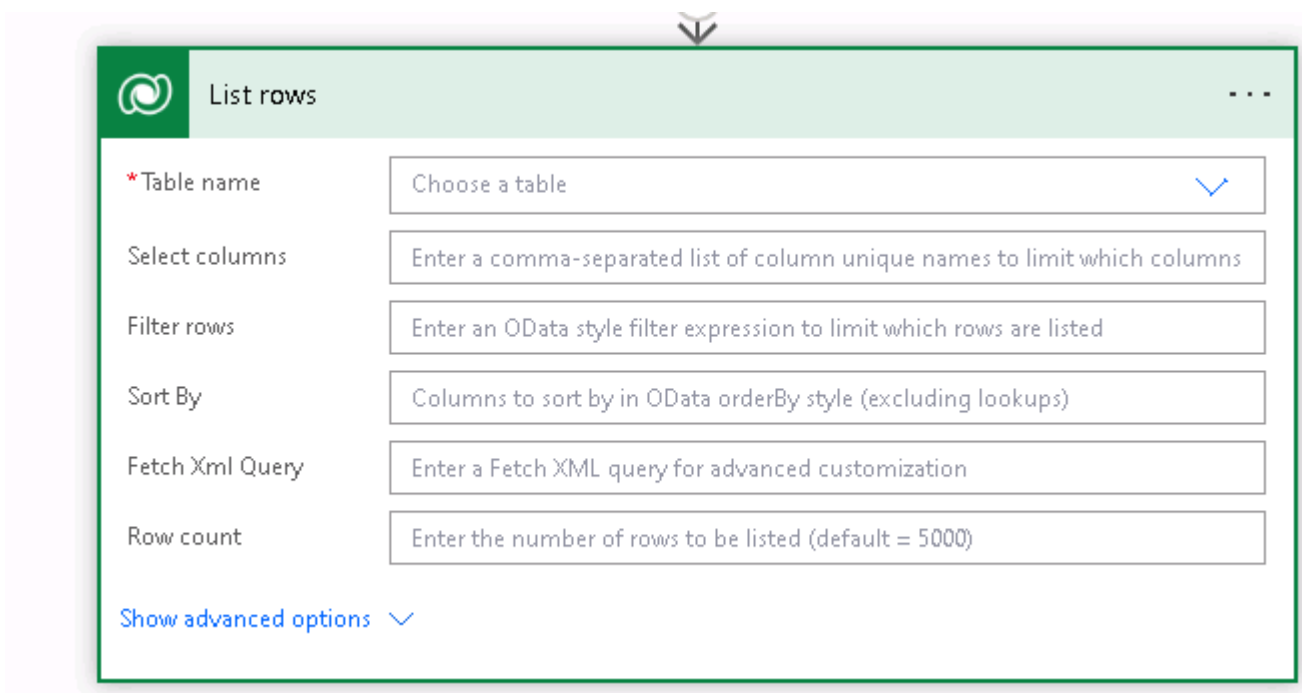
Enter `LoanNumber` and click **+ New step**.



Search for list rows and select **List rows Microsoft Dataverse**.



Select **Loans** for Table name and click **Show advanced options**.



Enter `rc_loannumber eq` for Filter rows and select **LoanNumber** from the dynamic content pane in parentheses (`rc_loannumber eq 'LoanNumber'`).

The screenshot shows the configuration for the 'List rows' action in Power Automate. The 'Parameters' tab is active, showing fields for 'Table name' (Loans), 'Select columns', 'Filter rows' (containing a filter expression for 'LoanNumber'), 'Sort By', 'Fetch Xml Query', and 'Row count'. Below these is an 'Advanced parameters' section. To the right, the 'Dynamic Content' pane is open, displaying a search bar with 'loan' and a list of fields including 'LoanNumber' and 'Longitude'. The 'LoanNumber' field is highlighted.

If you do not see the **Dynamic Content & Expression** pop-up, increase your browser width or zoom out slightly to reveal it (Keyboard shortcut: Ctrl + -).

Add single quotes (') before and after LoanNumber

Click **+ New step**.

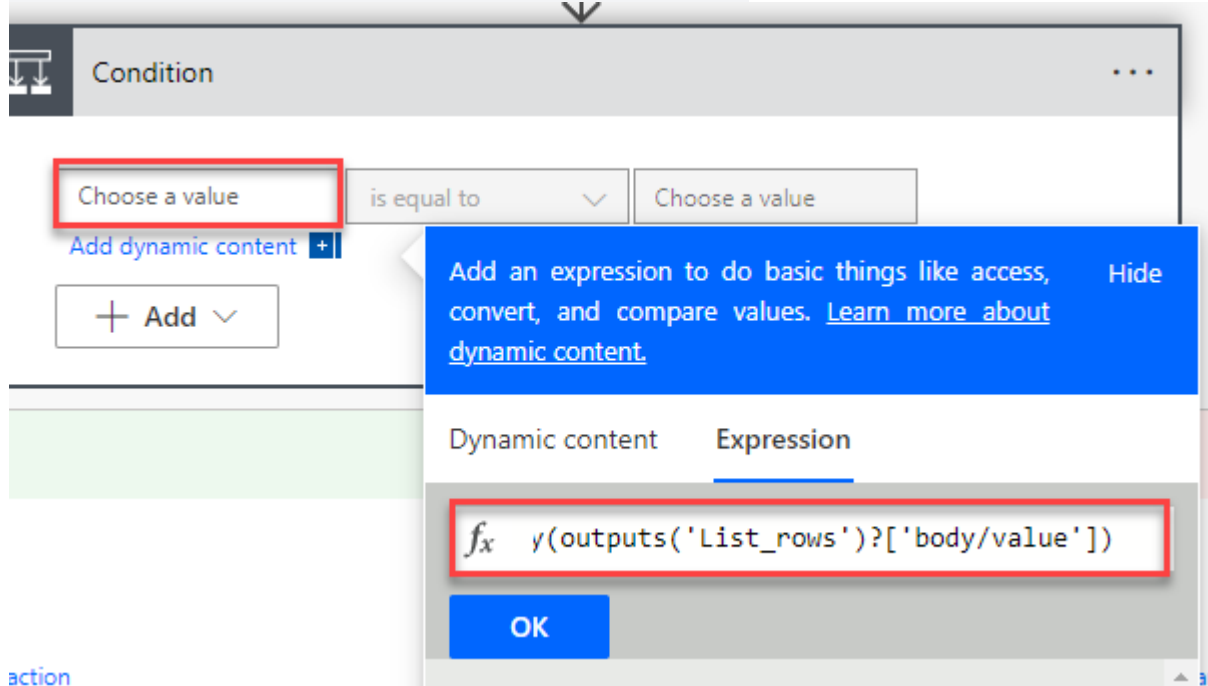
Select **Condition**.

The screenshot shows the 'Choose an operation' dialog box. It has a search bar at the top and tabs for 'All', 'Built-in', 'Standard', 'Premium', 'Custom', and 'My clipboard'. Below the tabs, there are two main sections: 'Triggers' and 'Actions'. The 'Condition' operation is highlighted with a red box. Below it, the 'Analyze positive or negative sentiment in text' operation is visible.

Click to select the first operand field, go to the dynamic content pane, and select the expression tab.

Paste the expression below and click **OK**. This checks if any rows were returned.

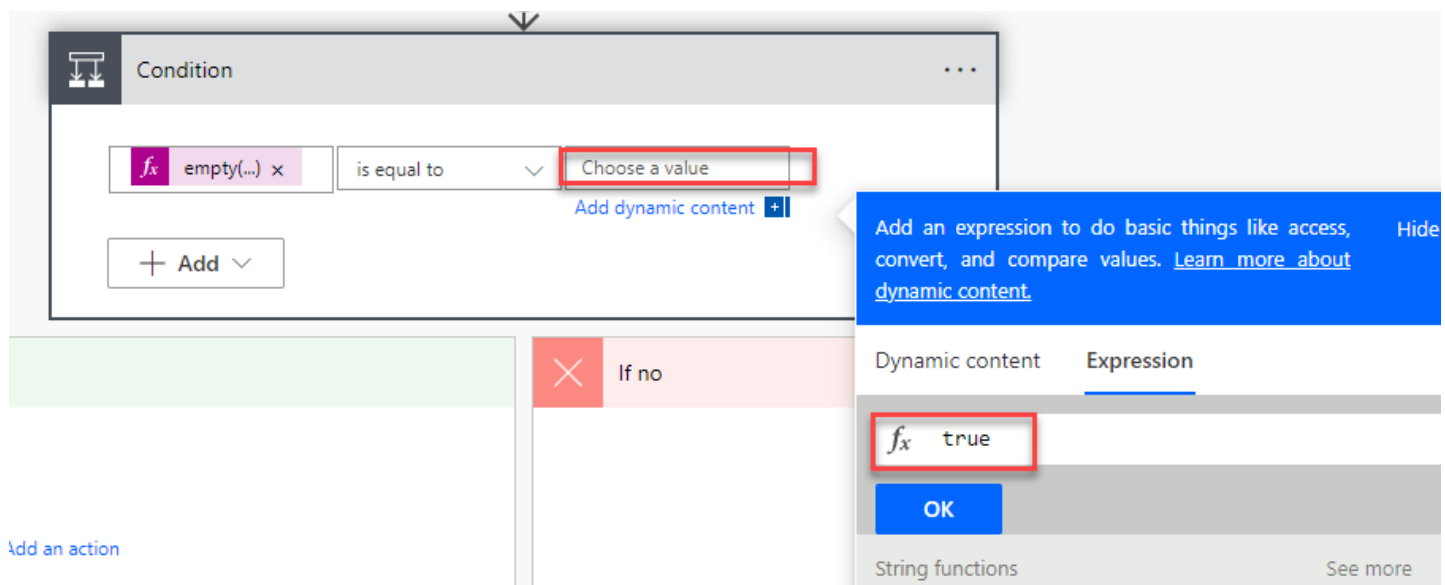
```
empty(outputs('List_rows')?['body/value'])
```



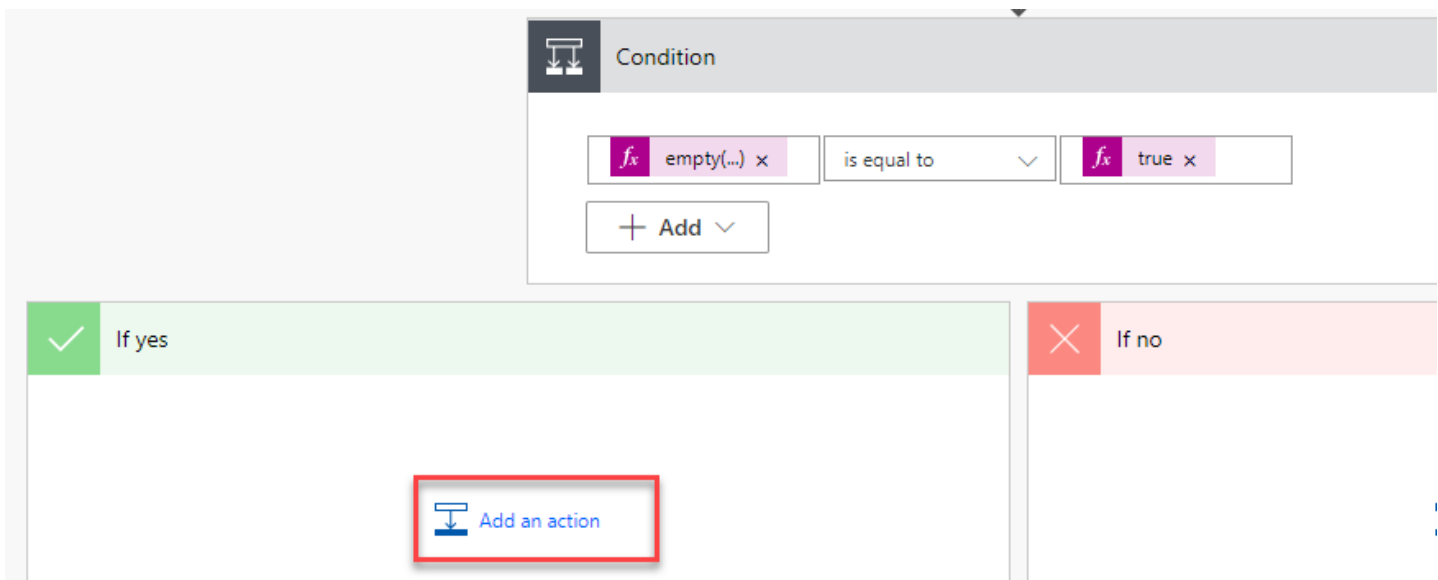
Select **is equal to** for condition.

Click to select the second operand field, go to the dynamic content pane, and select the expression tab.

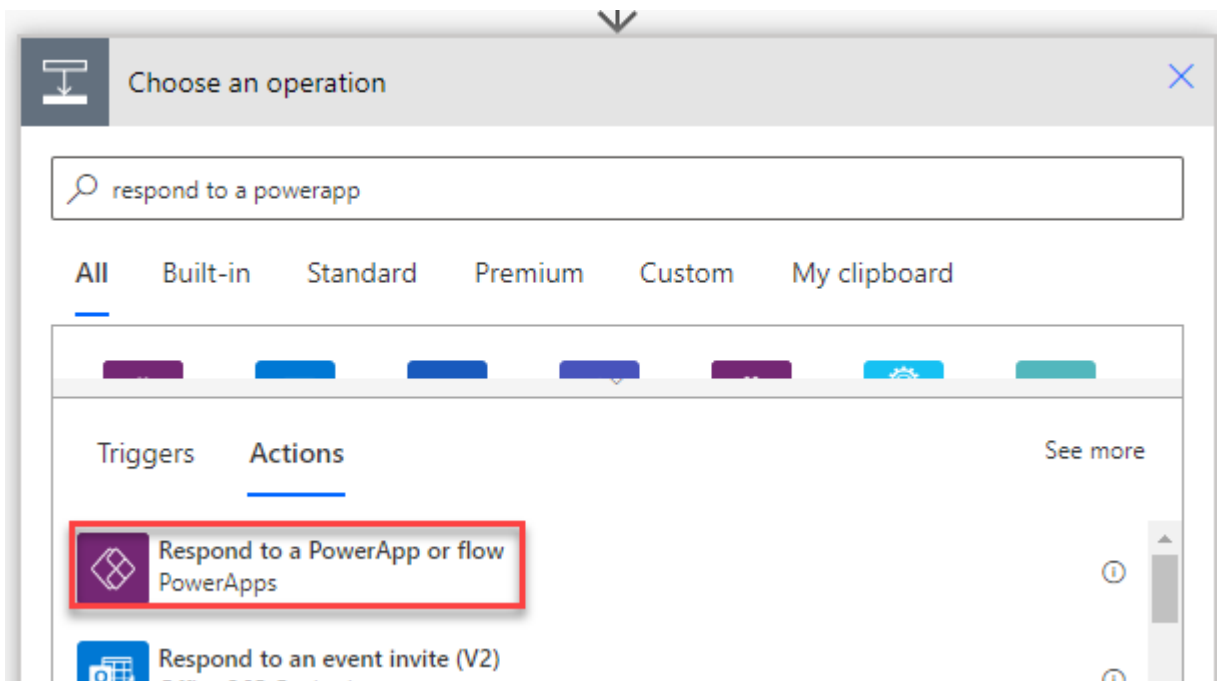
Type **true** and click **OK**.



Go to the **If yes** branch and click **Add an action**.



Select **Respond to a PowerApp or flow**.



Click **+ Add an output**.

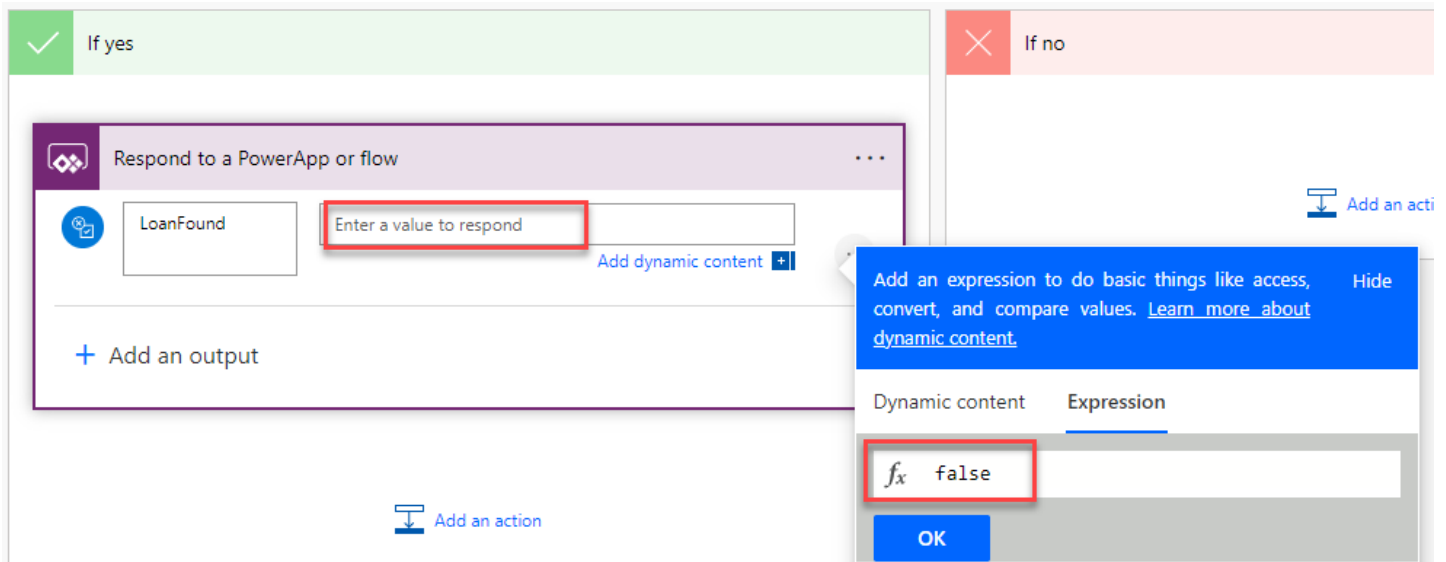


Select **Yes/No**.

Enter `LoanFound` for title and click to select the value field.

Go to the Dynamic content pane and select the **Expression tab**.

Type **false** and click **OK**.



Click **+ Add an output** again.

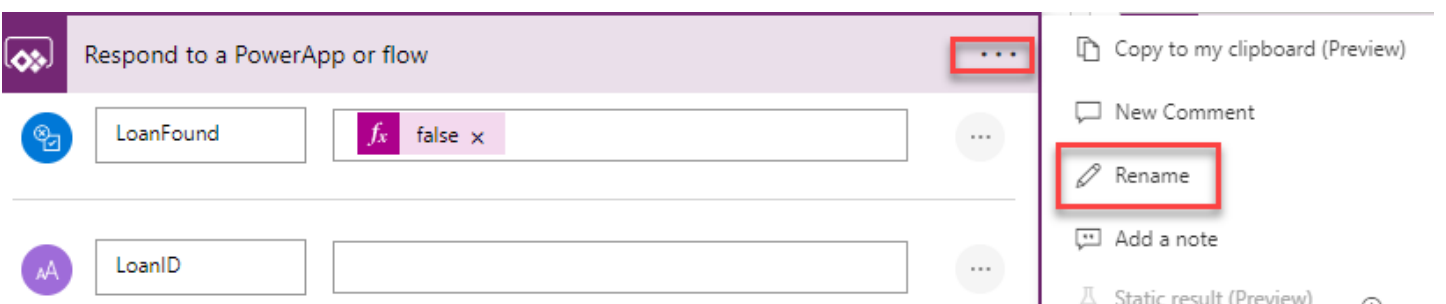
Select **Text**.

Enter **LoanID** for title.

Click on the value field, add an empty space.

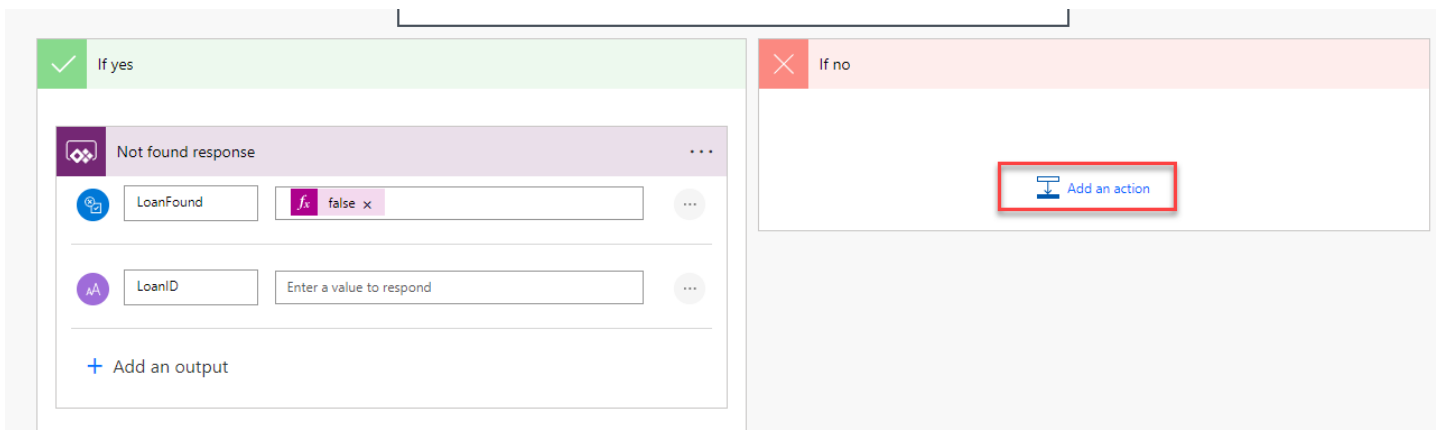


Click on the ... more actions button and select **Rename**.

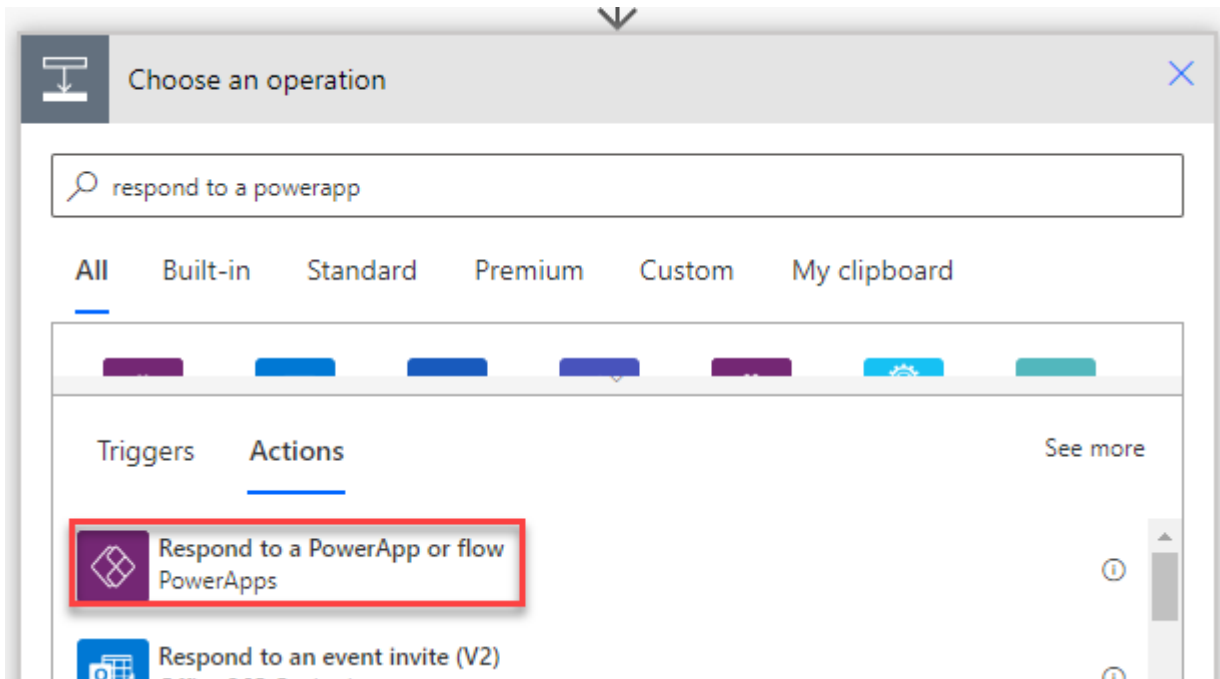


Rename the step **Not found response**.

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



Select **Respond to a PowerApp or flow**.



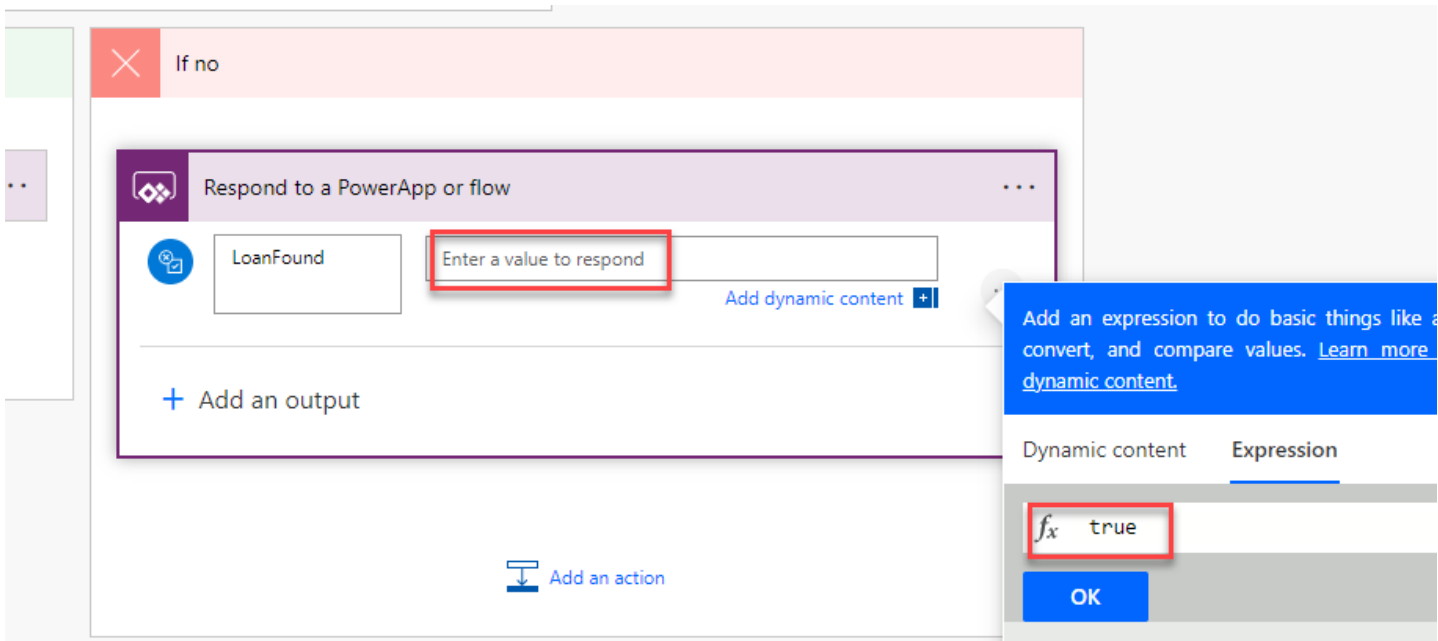
Click **+ Add an output**.

Select **Yes/No**.

Enter LoanFound for title and click to select the value field.

Go to the dynamic content pane and select the **Expression** tab.

Type **true** and click **OK**.



Click + **Add an output** again.

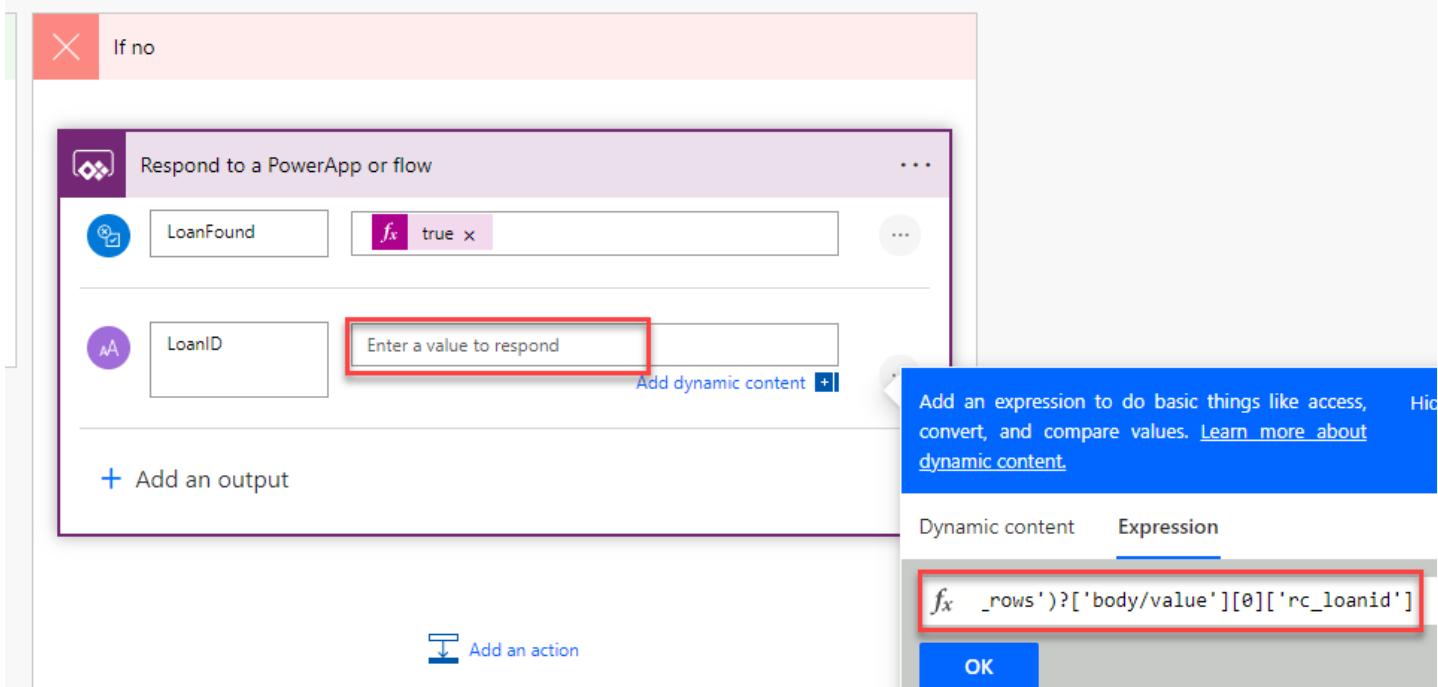
Select **Text**.

Enter `LoanID` for title.

Click to select the value field, go to the dynamic content pane, and select the **Expression** tab.

Paste the expression below and click **OK**. This gets the ID from the first row.

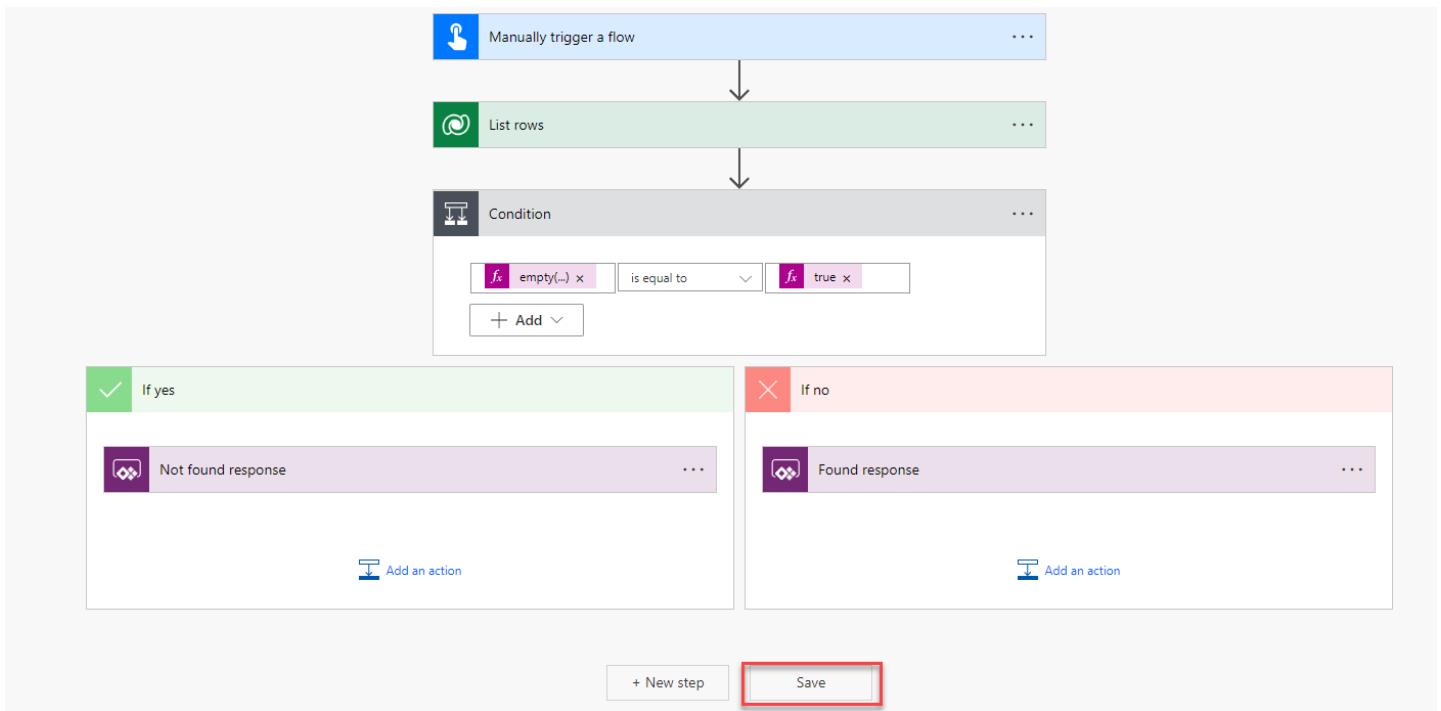
```
first(outputs('List_rows')?['body/value'])?['rc_loanid']
```



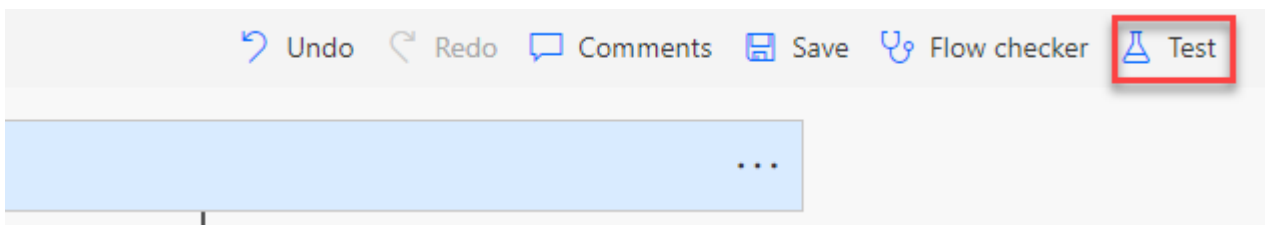
Click on the ... more actions button and select **Rename**.

Rename the step `Found response`.

Click **Save** to save the flow.



Click **Test**.



Select **Manually** and click **Test**.

Enter MC3747 for LoanNumber and click **Run flow**.

Run flow

CF Lookup Loan

Owner: First Last

LoanNumber *

This flow uses Microsoft Dataverse.
[Review connections and actions](#)

Run flowCancel

Click **Done**.

Click to expand the response step.

Make sure the output body matches your expectation.

OUTPUTS

Status code

200

Body

```
{  "loanfound": "True",  "loanid_": "e15e2abe-04e9-ec11-bb3c-000d3a3257e4"}
```

You may close the flow

Exercise 2: Inspection Child flow

Task 1: Setup Machine connection

Navigate to <https://make.powerapps.com/> and make sure you are in the Dev environment.

Select **Solutions** and open the **Construction Funding** solution.

Click **+ New** and select **More | Connection Reference**.

Objects

Search

All (3)

Apps (0)

Chatbots (0)

Cloud flows (1)

Custom connectors (1)

Desktop flows (1)

Tables (0)

+ New

Add existing

Publish all customizations

App

Automation

Chatbot

Dashboard

Report

Security

Table

More

All

Service

Loan

Inspection

Choice

Component Library

Connection Reference

Name

rc_5Fbuilder-20risk-20service

CF Lookup Loan

Perform Site Inspection

Enter **Desktop Flows** for Display name, select **Desktop flows** for Connector, click on the Connection dropdown and select **+ New connection**.

Environ
Dev -

New Connection Reference ✕

[Learn about](#) connections and connection references

Display name *

Desktop Flows

Name * ⓘ

rc_ DesktopFlows

Add a description

Connector *

Desktop flows

Connection * ⓘ ↻ Refresh

Choose an option

+ New connection

Select **Connect with username and password** for Connect and select your desktop. If you don't see your desktop here, go to desktop flow machine settings and make sure you have the Dev environment selected.



Desktop flows

Microsoft Premium

Enables desktop flows (previously called UI flows)

Connect *

Connect with username and password

Machine or machine group *



If you don't see a machine or a machine group, you can register a new machine now. To see recently registered machines or machine groups, refresh this list.

[Learn more](#)

Provide your Machine/VM admin username and password, and click **Create**.

Domain and username *

Password *

Cancel

Create


Close the connection browser tab or window.

Click on the **Refresh** connection button.

Connector *

Desktop flows

Connection * ⓘ

 Refresh

Choose an option

+ New connection

Select the connection you created and click **Create**.

New Connection Reference ✕

[Learn about](#) connections and connection references

Display name *

Desktop flows

Name * ⓘ

rc_ Desktopflows

Add a description

Connector *

Desktop flows

Connection * ⓘ ⓘ Refresh

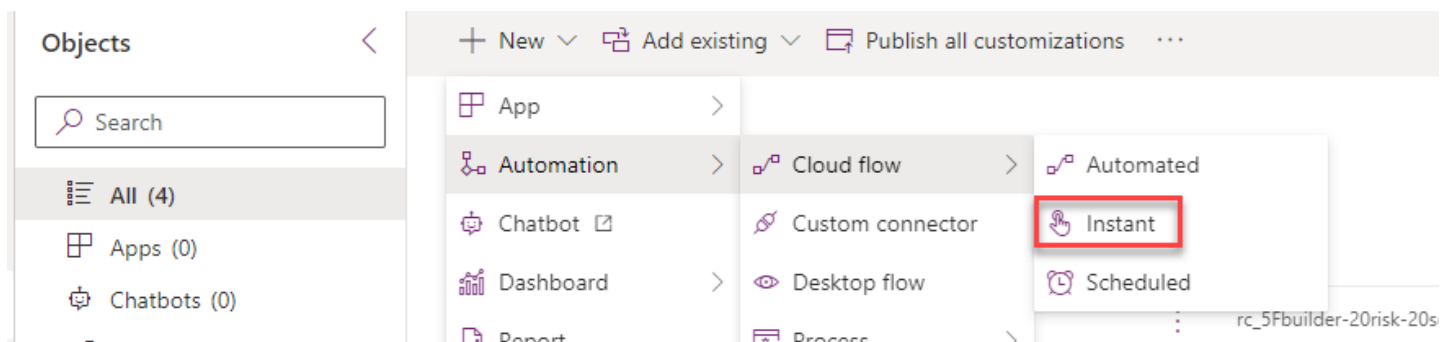
Create Close

Task 2: Create child flow

Navigate to <https://make.powerapps.com/> and make sure you are in the Dev environment.

Select **Solutions** and open the **Construction Funding** solution.

Click **+ New** and select **Automation | Cloud flow | Instant**.

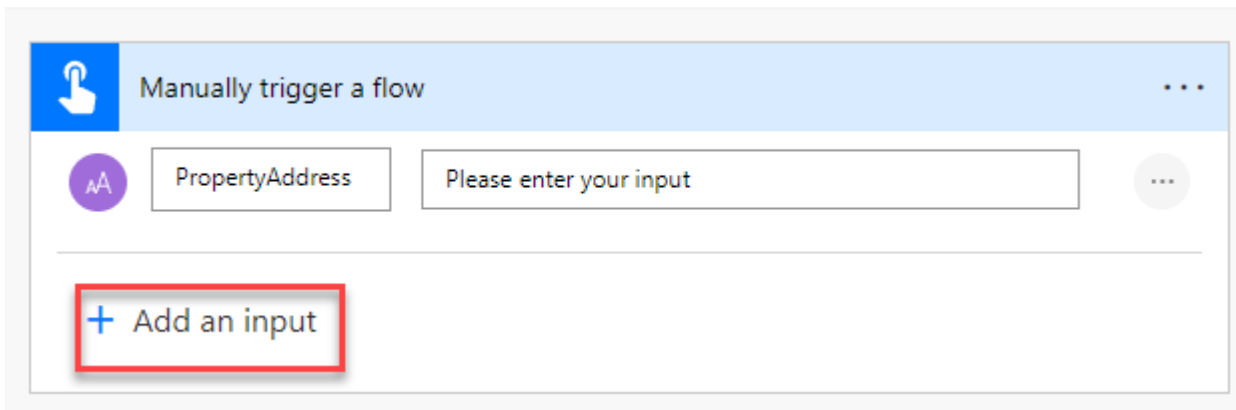


Enter `CF Manage Inspection Process` for Flow name, select **Manually trigger a flow**, and click **Create**.

Expand the trigger and click **+ Add an input**.

Select **Text**.

Enter `PropertyAddress` and click **+ Add an input** again.

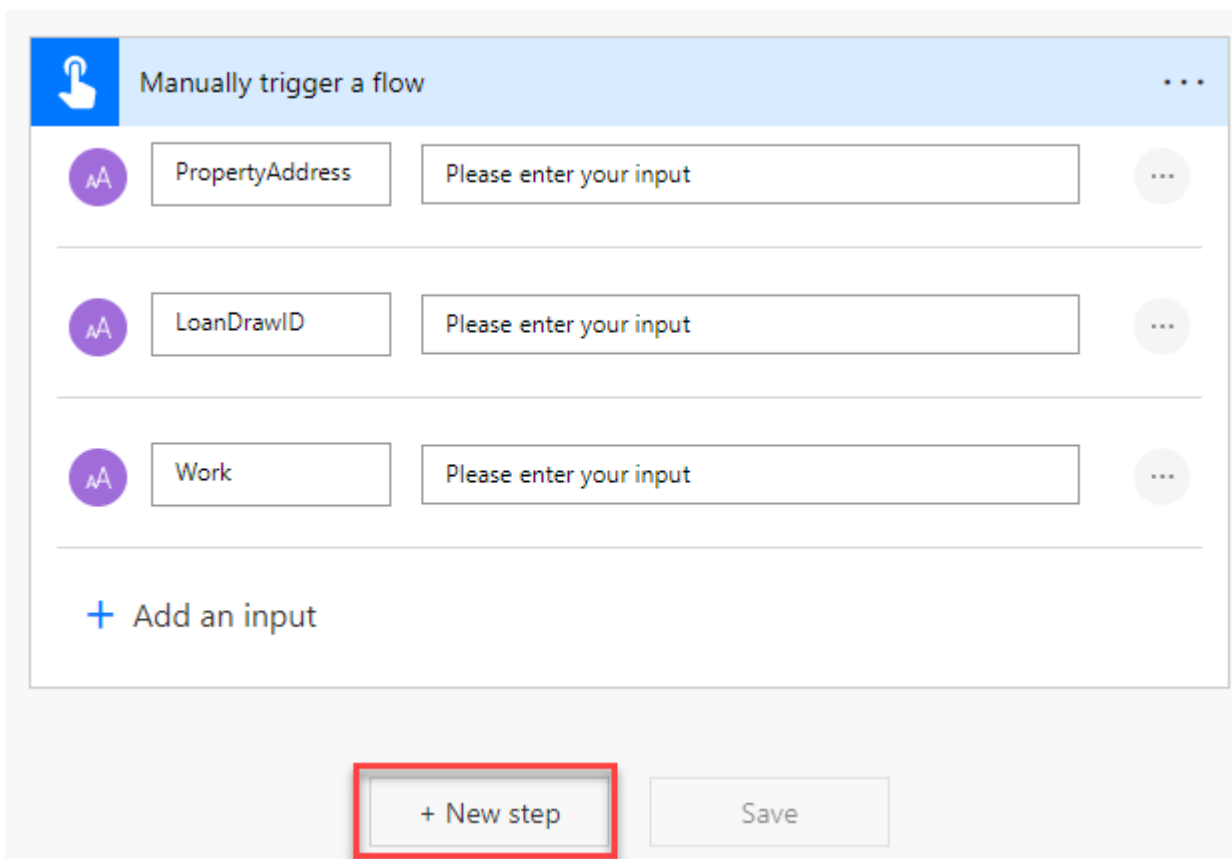


Select **Text**.

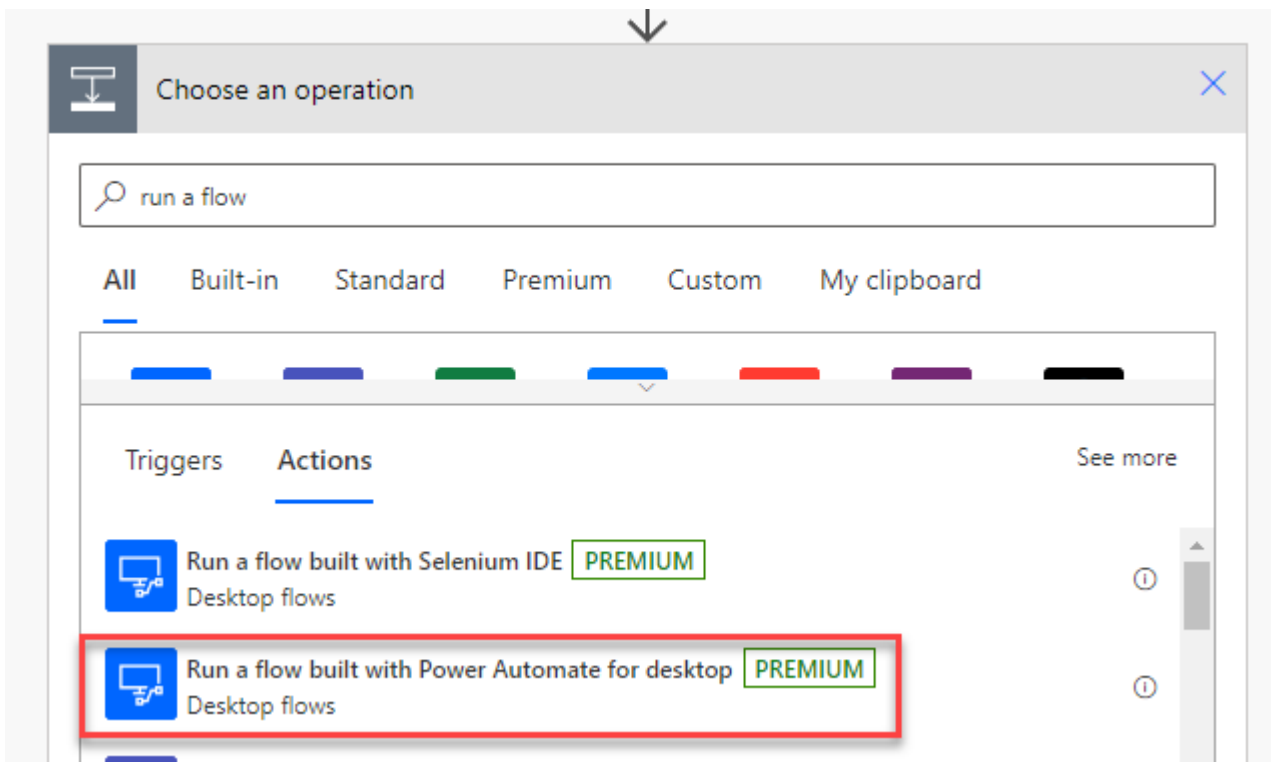
Enter `LoanDrawID` and click **+ Add an input** one more time.

Select **Text**.

Enter `Work`. You should now have three input parameters. Click **+ New step**.

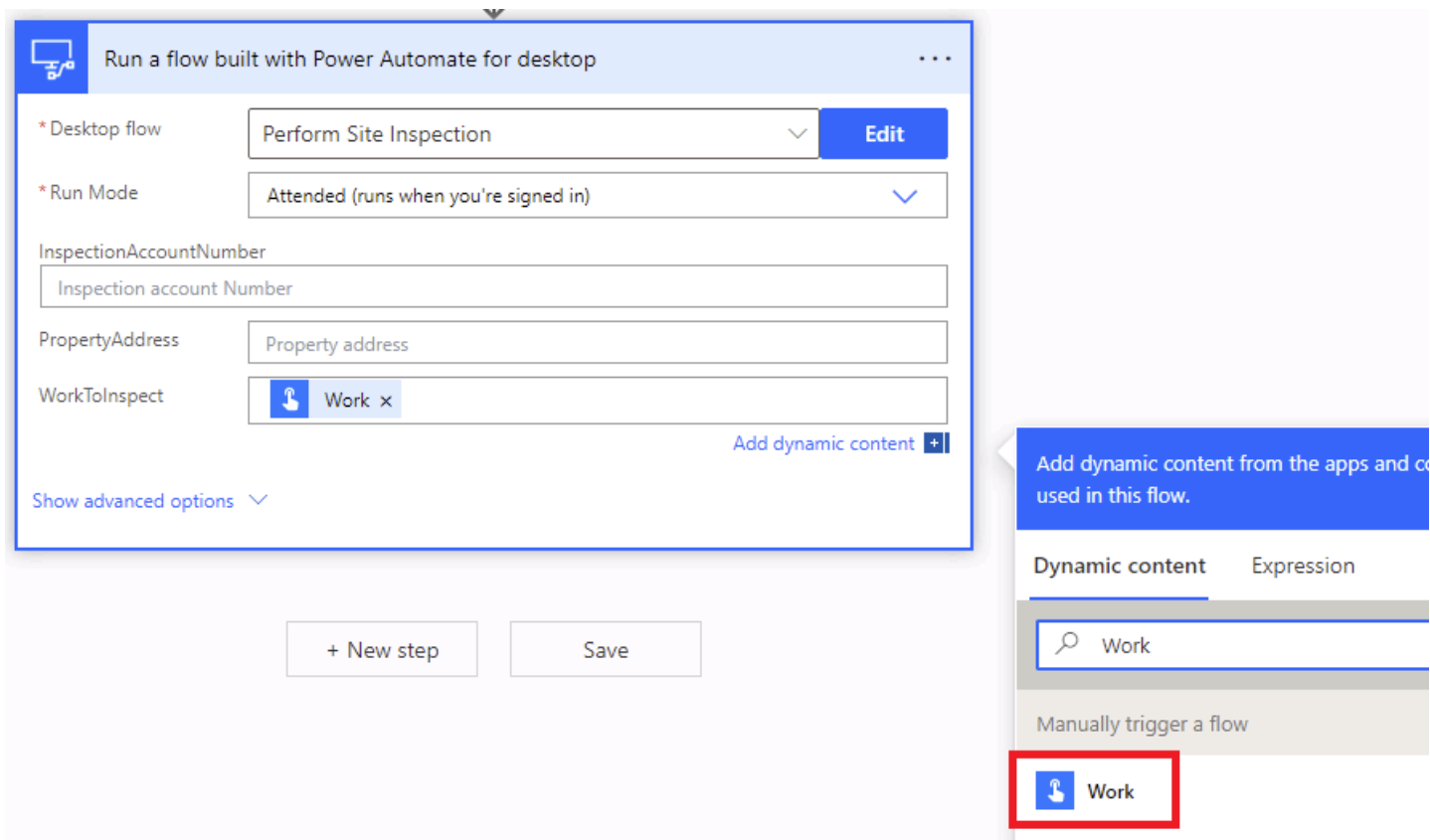


Select **Run a flow built with Power Automate for desktop**.



Select **Perform Site Inspection** for Desktop flow and select **Attended** for Run Mode.


Click on the **WorkToInspect** field and select **Work** from the dynamic content pane.



Click on the **PropertyAddress** and select **PropertyAddress** from the dynamic content pane.

Enter your name for Inspection account number.

↓



Run a flow built with Power Automate for desktop

...

* Desktop flow

Perform Site Inspection

Edit

* Run Mode


Attended (runs when you're signed in)

▼


InspectionAccountNumber

Jane Doe

PropertyAddress

 PropertyAddress x

WorkToInspect

 Work x


Show advanced options

▼

Click **+ New step**.


Search the connectors and actions for **Parse JSON**. Select the **Parse JSON** action which is part of the **Data Operation** connector.

↓



Choose an operation

×

 parse

All

Built-in

Standard

Premium


Custom


My clipboard


Triggers

Actions

See more

 Parse CSV
Encodian

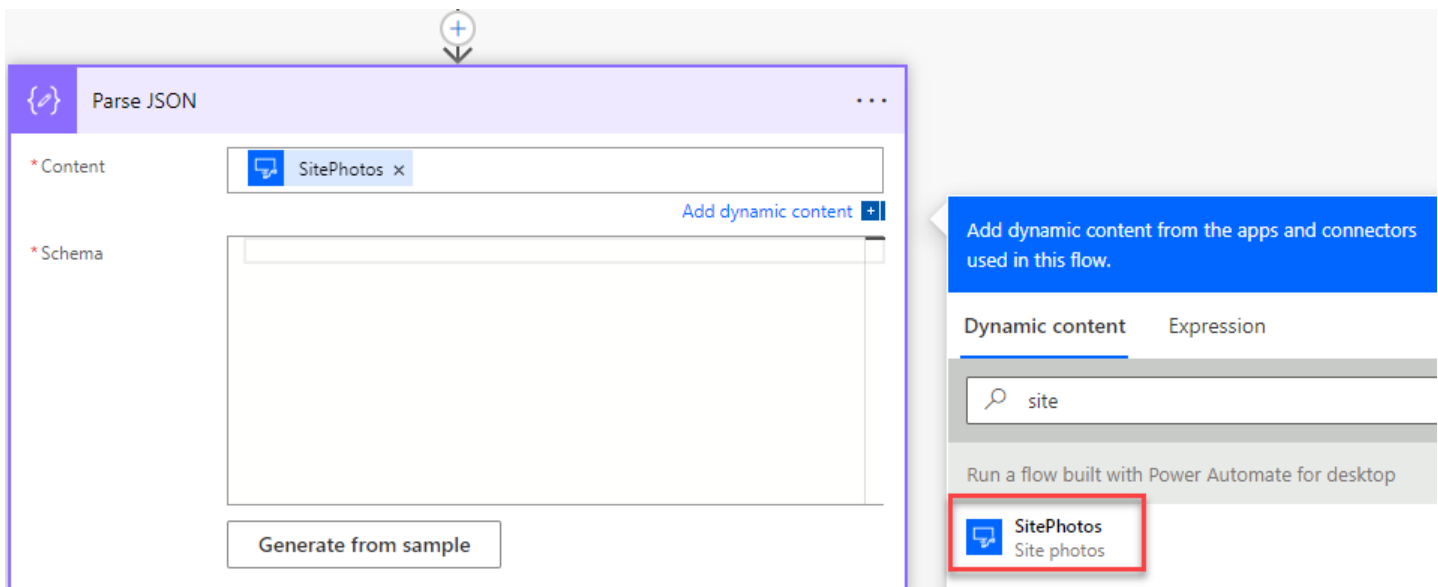
 Parse JSON
Data Operation

 Parse ID card
IDB

①

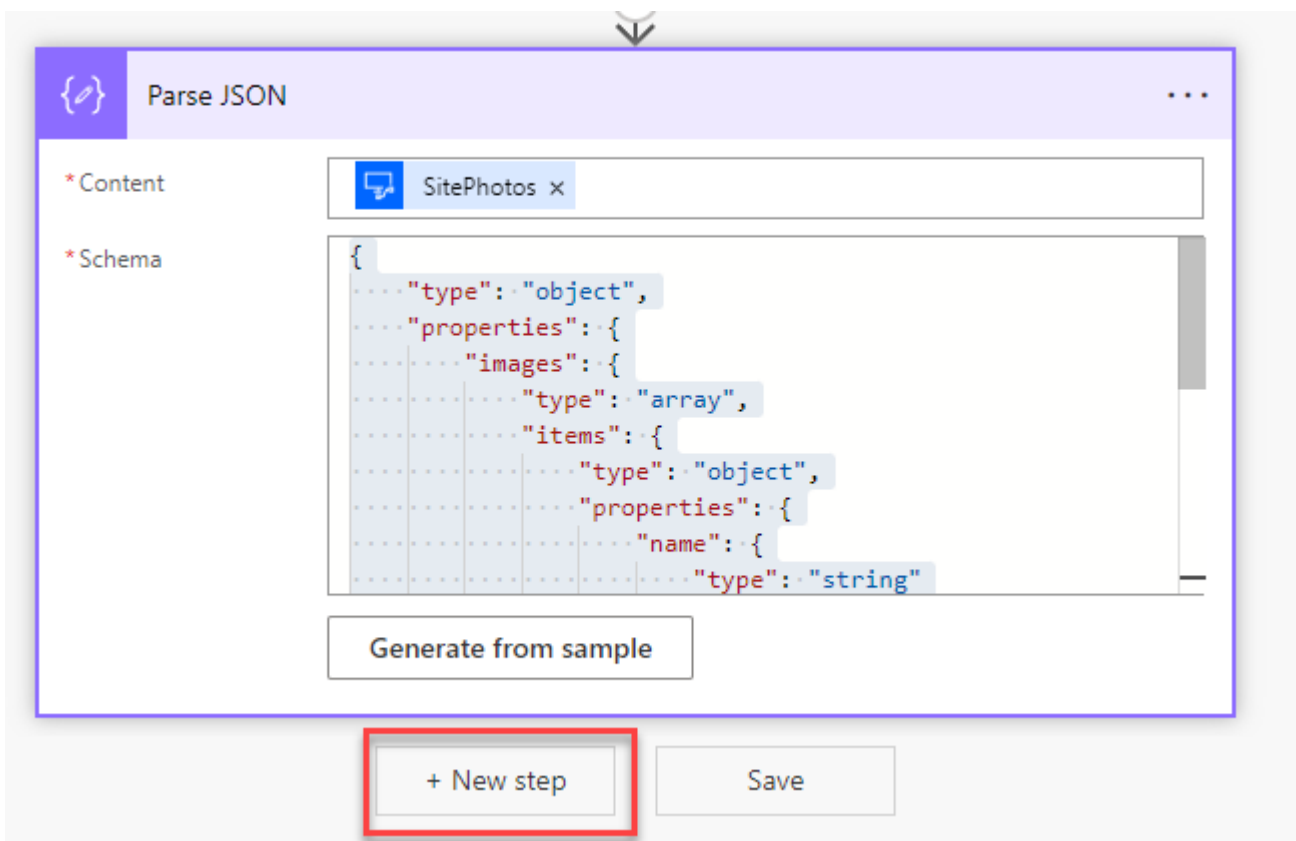
①

Click on the **Content** field and select **SitePhotos** from dynamic content pane.

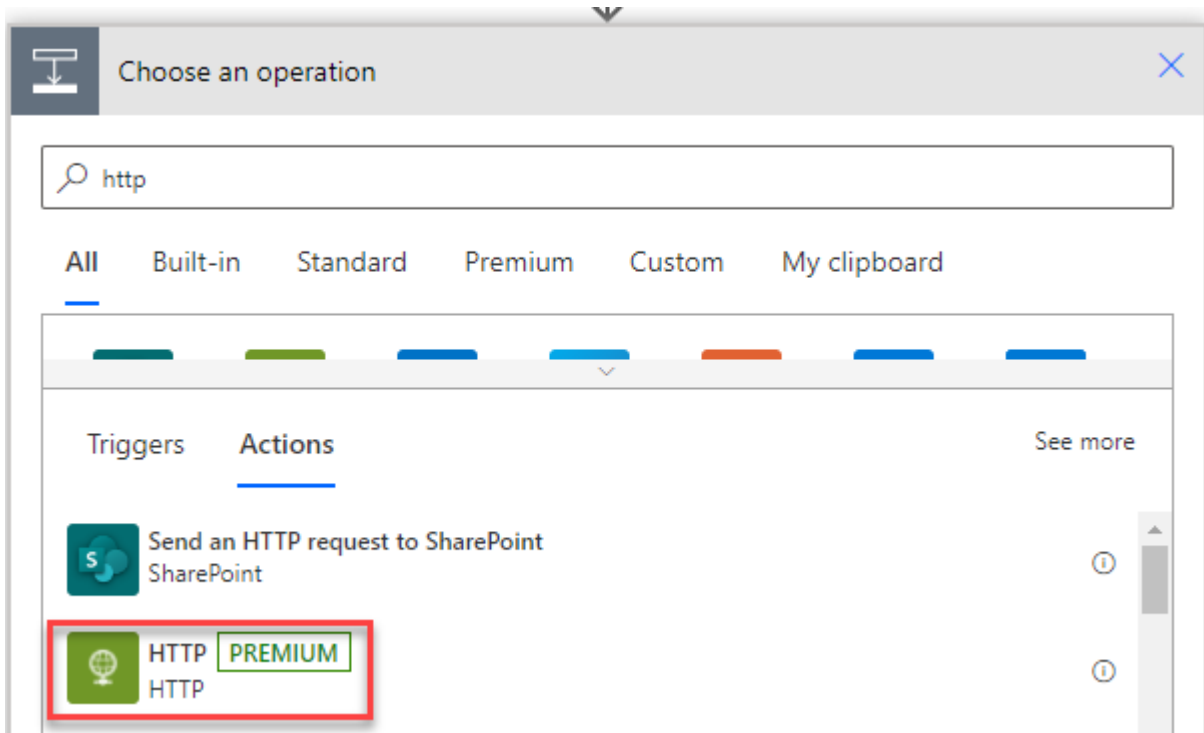


Paste the JSON schema below in the **Schema** field and click **+ New step**. Typically, you would generate this from a sample of the data expected.

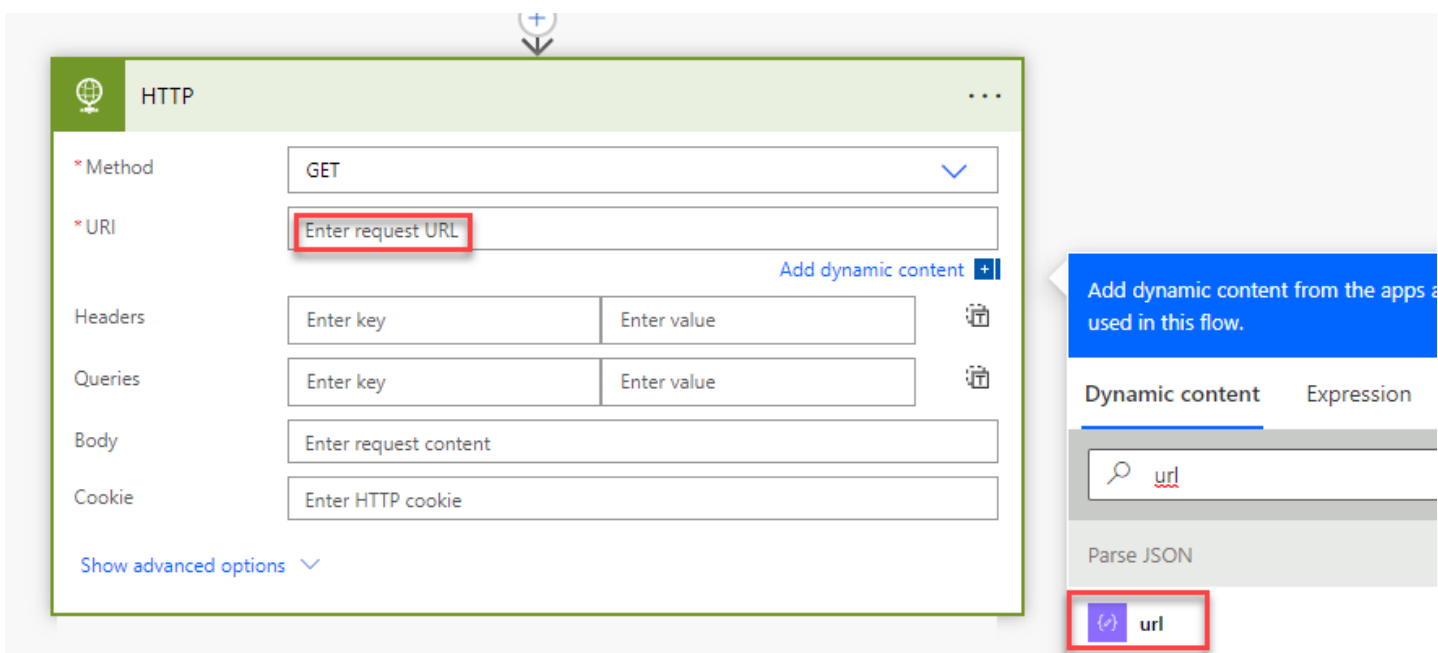
```
json { "type":"object", "properties":{ "images":{ "type":"array", "items":{
"type":"object", "properties":{ "name":{ "type":"string" }, "url":{
"type":"string" } }, "required":[ "name", "url" ] } } } }
```



Select the **HTTP** action.

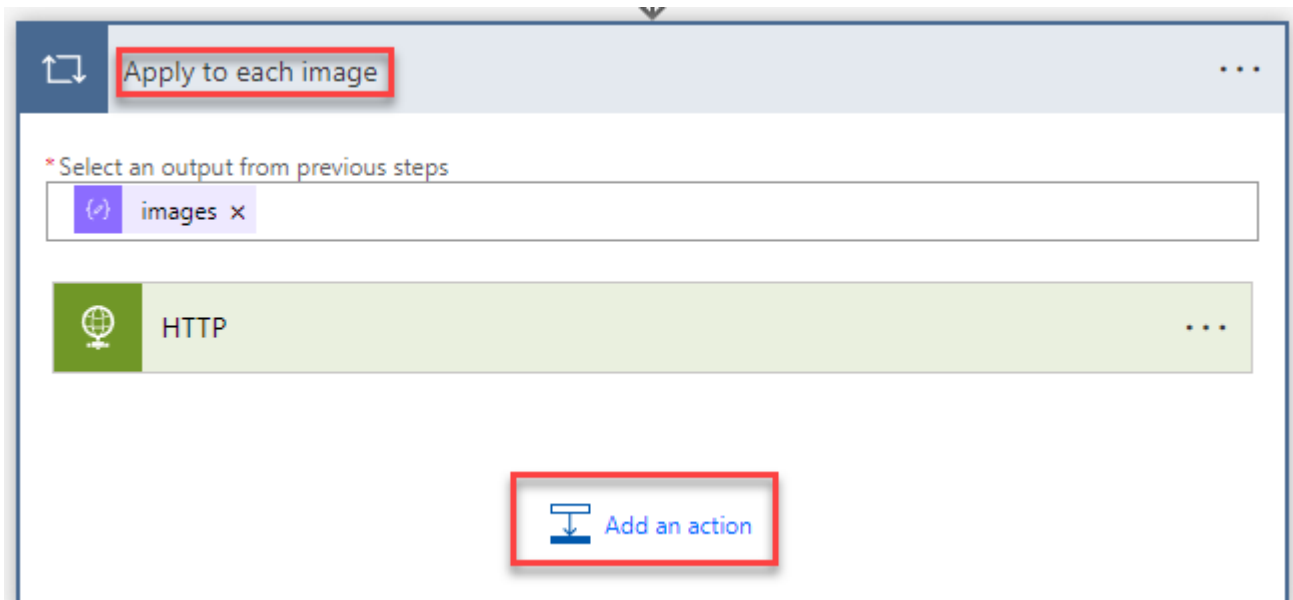


Select **GET** for Method, click on the **URI** field, and select **url** from the dynamic content pane.

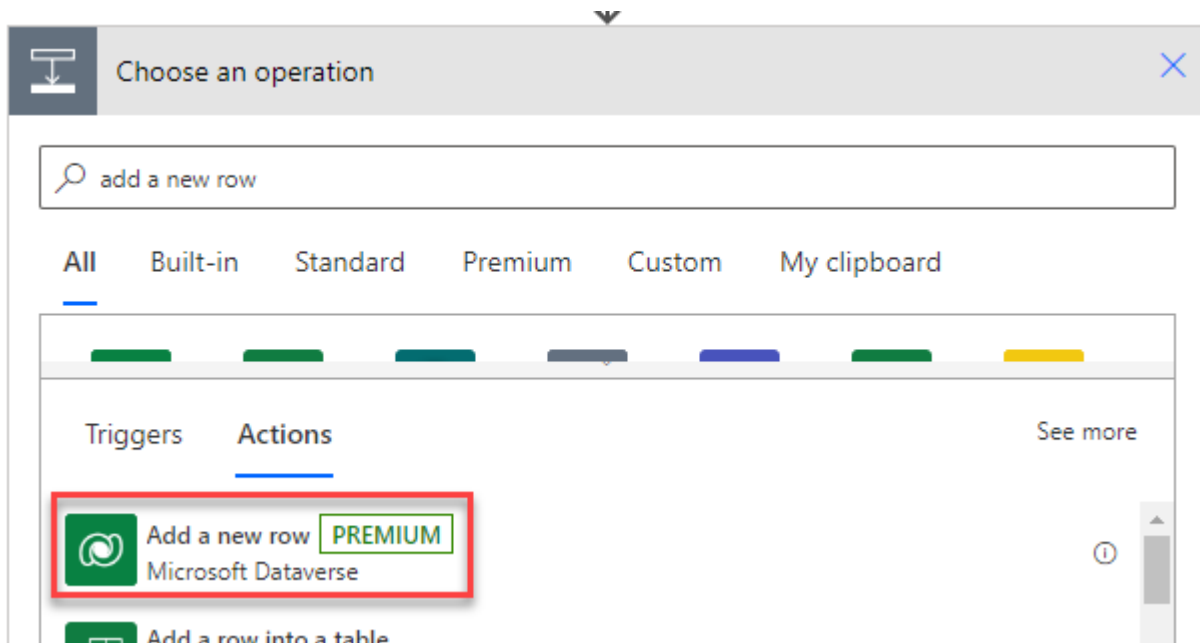


Apply to each will be added automatically for you. Rename the Apply to each step **Apply to each image**.

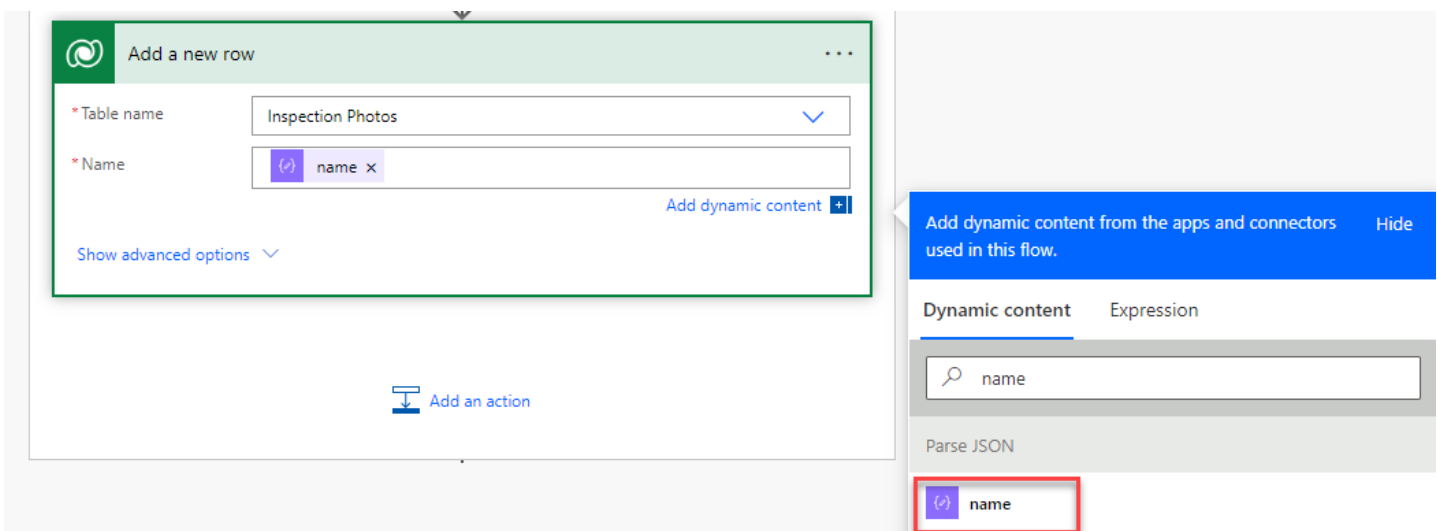
Click **Add an action**.



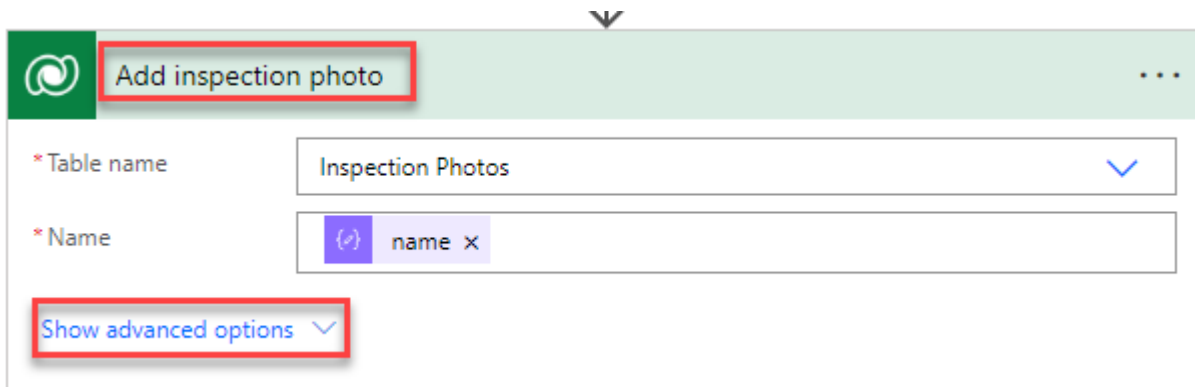
Select the **Add a new row** action from the **Microsoft Dataverse** connector.



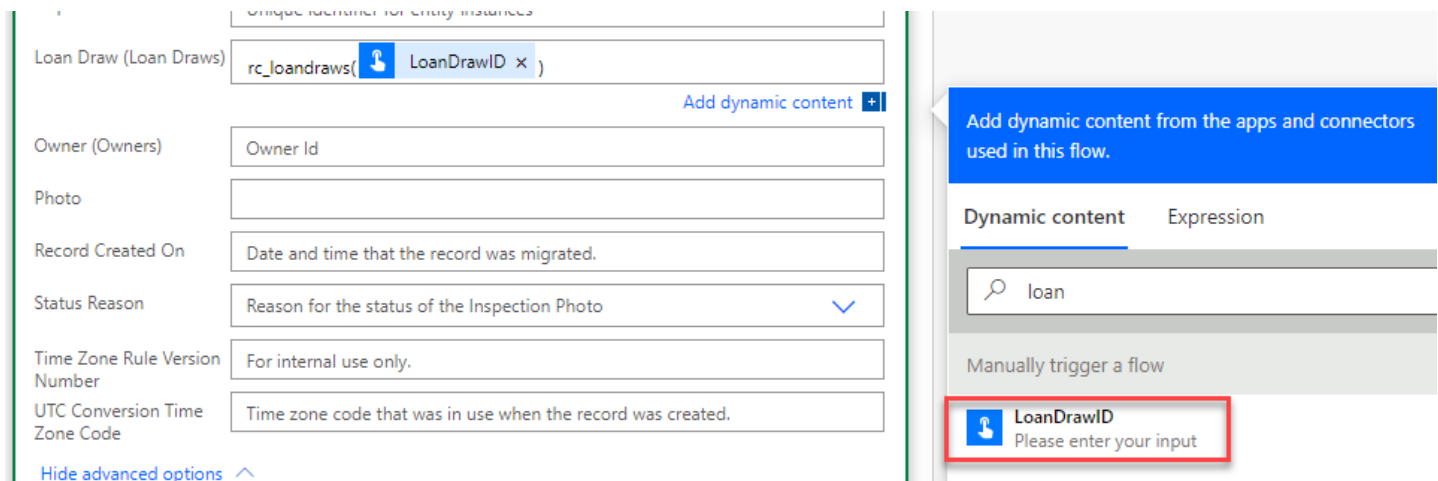
Select **Inspection Photos** for Table name, click on the **Name** field, and select **name** from the dynamic content pane.



Rename the Add a new row step to **Add inspection photo** and click **Show advanced options**.



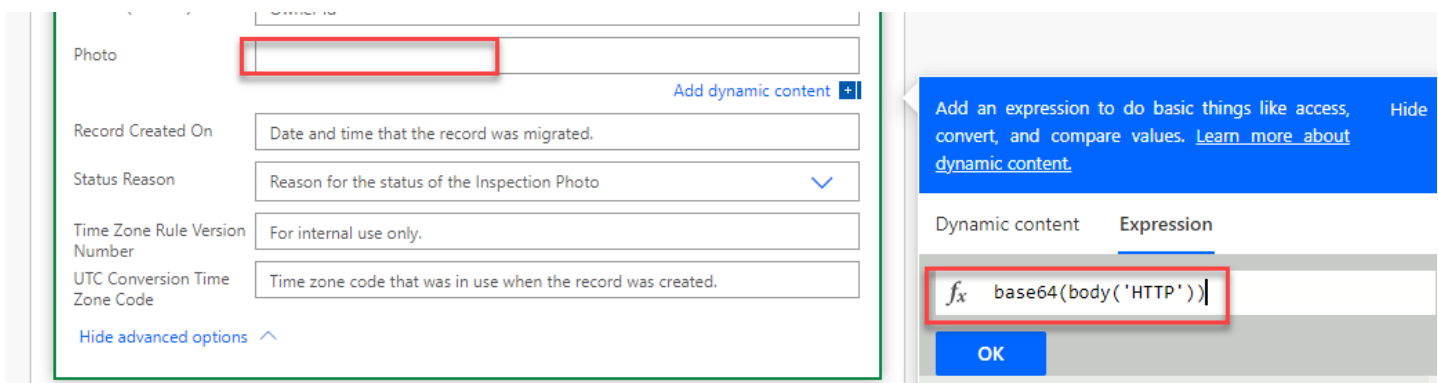
Enter `rc_loandraws()` for Loan Draw, place your cursor inside the parentheses, and select **LoanDrawID** from the dynamic content pane.



Click on the **Photo** field, go to the dynamic content pane, and select the **Expression** tab.

Paste the expression below and click **OK**.


```
base64(body('HTTP'))
```



Click **+ New step**.


Record Created On	Date and time that the record was migrated.
Status Reason	Reason for the status of the Inspection Photo ▼
Time Zone Rule Version Number	For internal use only.
UTC Conversion Time Zone Code	Time zone code that was in use when the record was created.

[Hide advanced options](#) ^

 [Add an action](#)

+ New step Save

Select the **Update a row** action from the **Microsoft Dataverse** connector.


Choose an operation
×

All Built-in Standard Premium Custom My clipboard

Triggers

Update a row
Excel Online (Business)

Update a row **PREMIUM**
Microsoft Dataverse


Unrelate rows **PREMIUM**

See more

Select **Loan Draws** for Table name, click on the **Row ID** field and select **LoanDrawID** from the dynamic content pane.

Click **Show advanced options**.

↓




Update a row

* Table name

Loan Draws

▼

* Row ID



LoanDrawID

×

Name

Show advanced options

▼

Click on the **Inspected On** field, go to the dynamic content pane, select the **Expression** tab, type **utcNow()** and click **OK**.

Funded On

Funding Sequencee Number

Funding Transfer Number

Inspected On

Inspection Job

Loan (Loans)

Owner (Owners)

Owner Id

Requested On

Risk Score

Status

Status of the Loan Draw

▼

Add dynamic content


+

Add an expression to do basic things like access, convert, and compare values. [Learn more about dynamic content.](#)

Hide

Dynamic content

Expression


 utcNow()

OK


Click on the **Inspection Job** field and select **JobNumber** from the dynamic content pane.

Funding Transfer Number

Inspected On

 utcNow()

Inspection Job

 JobNumber

Add dynamic content

+

Loan (Loans)

Owner (Owners)

Owner Id

Requested On

Risk Score

Status

Status of the Loan Draw

▼

Status Reason

▼

Time Zone Rule Version


For internal use only

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


Hi

Dynamic content

Expression

 Job

Run a flow built with Power Automate for desktop

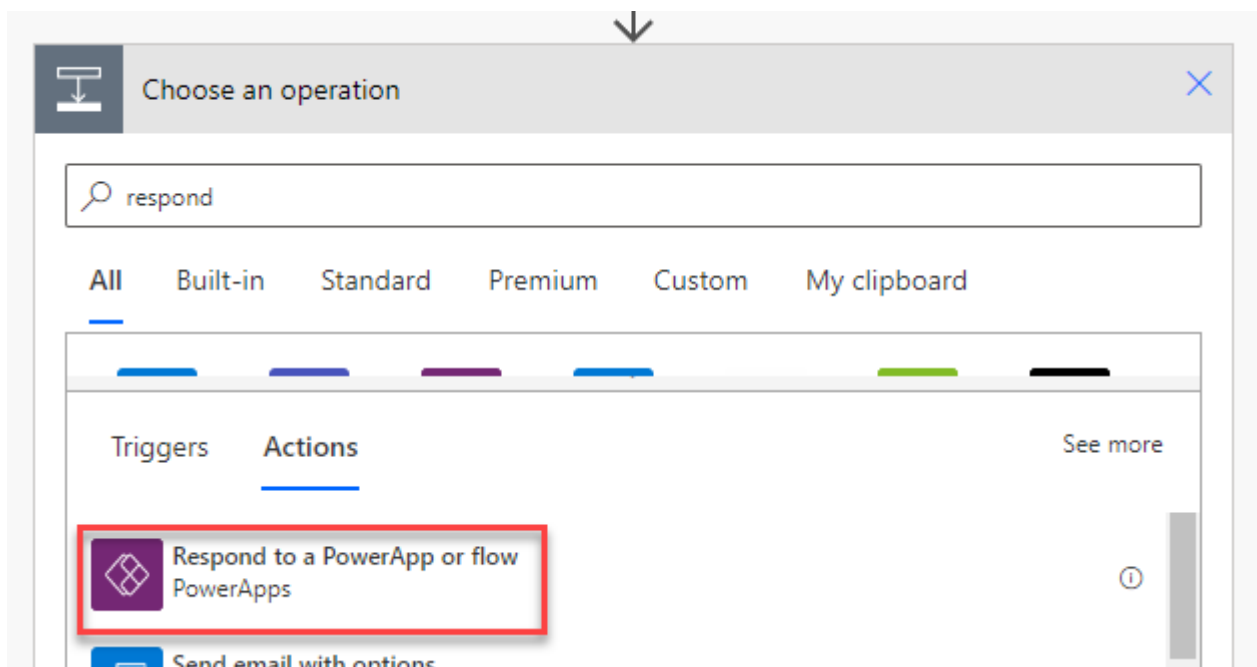
 JobNumber

Select **Inspection Completed** for Status Reason and click **Hide advanced options**.

RISK SCORE	
Status	Status of the Loan Draw ▼
Status Reason	Inspection Completed ▼
Time Zone Rule Version Number	For internal use only.
UTC Conversion Time Zone Code	Time zone code that was in use when the record was created.
Hide advanced options ^	

Rename the step **Update loan draw** and click **+ New step**.

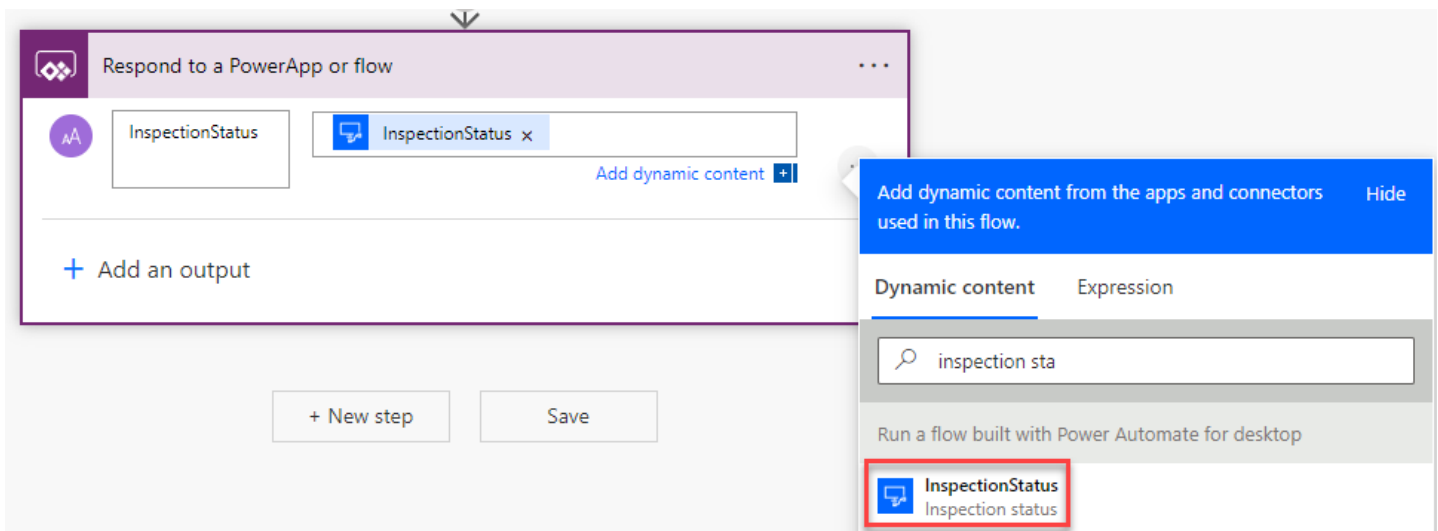
Select the **Respond to PowerApp or flow** action from the **PowerApps** connector.



Click **+ Add an output**.

Select **Text**.

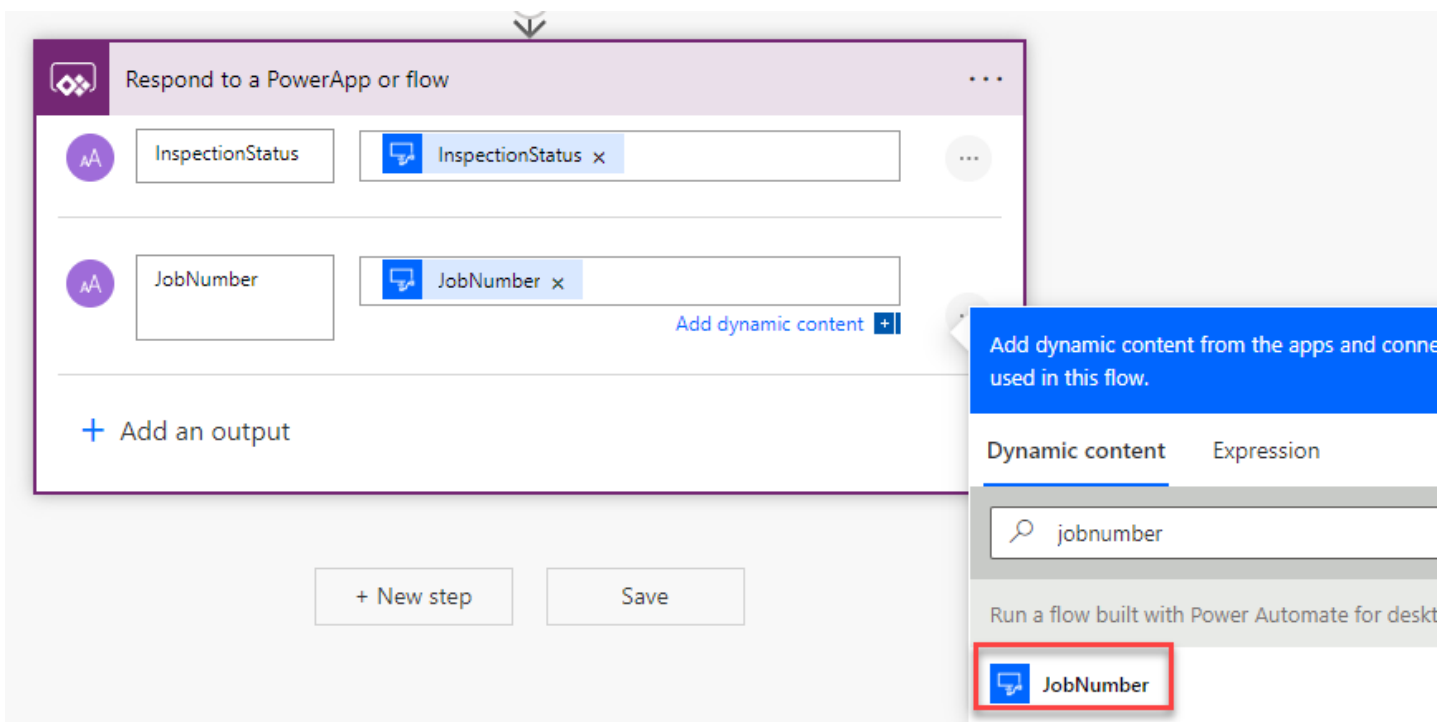
Enter `InspectionStatus`, click on the value field and select **InspectionStatus** from the dynamic content pane.



Click **+ Add an output** again.

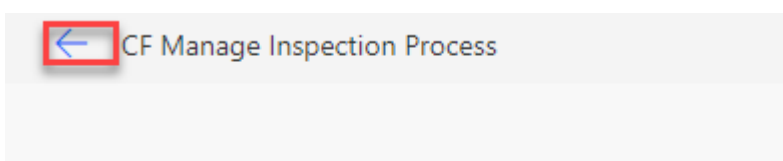
Select **Text**.

Enter JobNumber, click on the value field and select **JobNumber** from the dynamic content pane.



Click **Save** to save the flow.

Click on the **back** arrow.



Open the flow details.

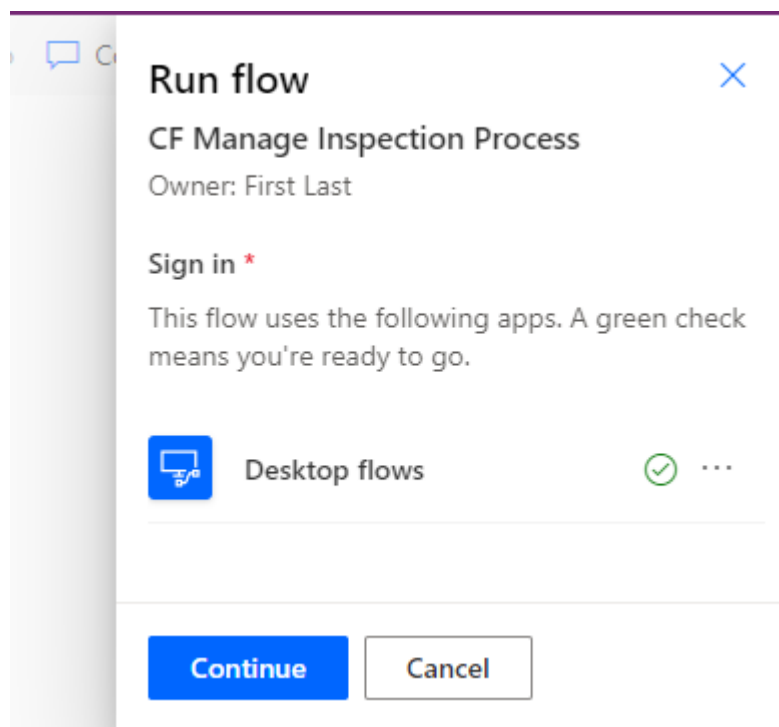
Builder Risk Service > All

	Display name ↑ ▾		Name ▾
	Builder Risk Service		rc_5Fbuilder-20risk-20service
	CF Lookup Loan		CF Lookup Loan
	CF Manage Inspection Process		CF Manage Inspection Process
	Desktop flows		rc_Desktopflows

Click **Run**.

If prompted, select **Manually** and click **Test** again.

Click **Continue**.



DO NOT navigate away from this page.

Start a new browser instance and navigate to <https://make.powerapps.com/> and make sure you are in the Dev environment.

Select **Apps** and launch the **Loan Manager** application.

Home

Learn

Apps

Create

Dataverse

Flows

Apps

Apps

Component libraries

Name	Modified
Loan Manager	23 h ago
Asset Checkout	1 wk ago

Open the first loan record.

Click **Related** and select **Loan Draws**.

Jim Glynn - Saved

Loan

General Related

Loan Manager

Name

Related - Common

Audit History

Loan Draws

Click **+ New Loan Draw**.

General Loan Draws Related

Show Chart + New Loan Draw Add Existing Loan Draw Refresh

Loan Draw Associated View

Name ↑

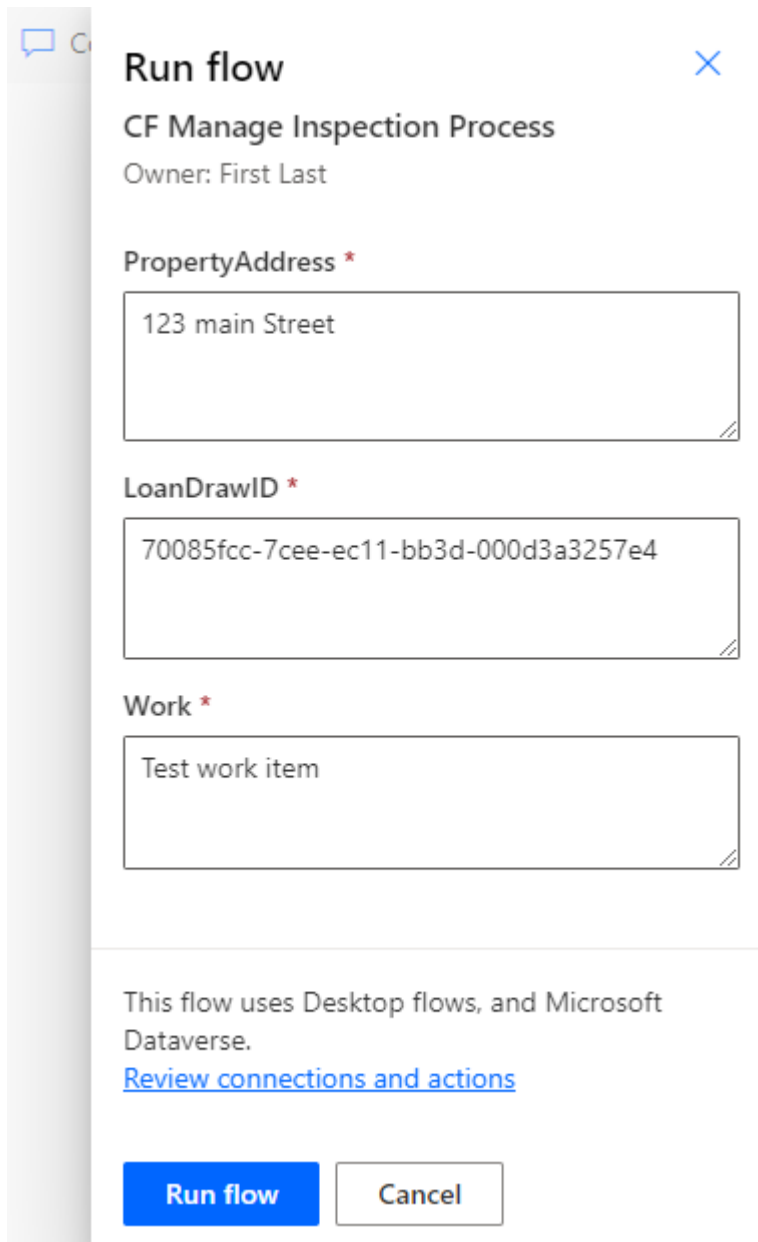
Enter **Test Draw** for Name and click **Save**.

Go to the URL and copy the **id** GUID. Paste this id into Notepad, you will need it in future steps.

https://orgc5f517e3.crm.dynamics.com/mairecord&etn=rc_loandraw&id=70085fcc-7cee-ec11-bb3d-000d3a3257e4

Apps | Loan Manager

Go back to the Cloud Flow and enter `123 Main Street` for `PropertyAddress`, paste the id you copied in the `LoanDrawID` field, type `Test work item` for `Work`, and click **Run flow**.

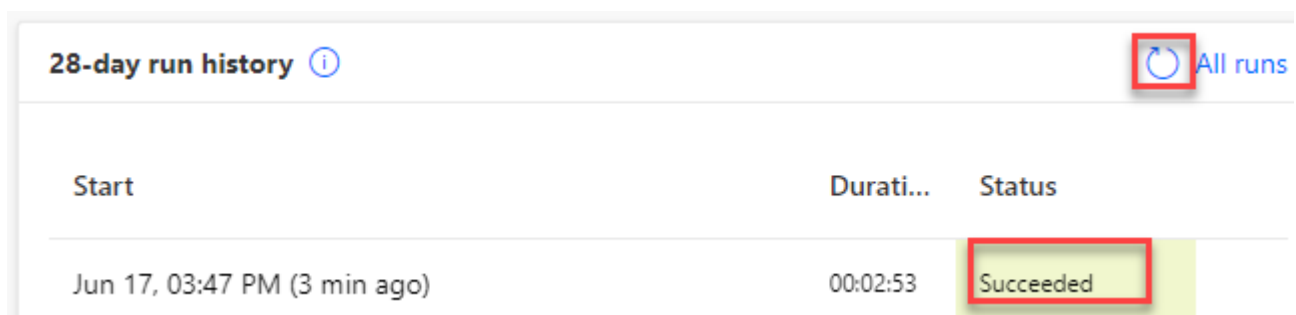


The screenshot shows a 'Run flow' dialog box with a close button (X) in the top right corner. The title is 'CF Manage Inspection Process' and the owner is 'First Last'. There are three input fields: 'PropertyAddress' with the value '123 main Street', 'LoanDrawID' with the value '70085fcc-7cee-ec11-bb3d-000d3a3257e4', and 'Work' with the value 'Test work item'. Below the fields, there is a note: 'This flow uses Desktop flows, and Microsoft Dataverse.' with a link 'Review connections and actions'. At the bottom, there are two buttons: 'Run flow' (blue) and 'Cancel' (white).

Wait for the flow run to complete.

Close the run flow pane.

Go to the **28-day run history** and click **refresh** until the flow run shows as **Succeeded**.



The screenshot shows a table titled '28-day run history' with an information icon (i) and a refresh button (circular arrow) next to the text 'All runs'. The table has three columns: 'Start', 'Durati...', and 'Status'. The first row shows a run that started on 'Jun 17, 03:47 PM (3 min ago)' with a duration of '00:02:53' and a status of 'Succeeded'. The 'Succeeded' status is highlighted with a red box.



Start	Durati...	Status
Jun 17, 03:47 PM (3 min ago)	00:02:53	Succeeded

Go back to the **Loan Manager** application, click **Related** and select **Inspection Photos**.

Test Draw - Saved

Loan Draw

General Related







Name	Related - Common
Owner	 Audit History
	 Inspection Photos

You should see the inspection photos created by the flow.




Test Draw - Saved

Loan Draw

General Inspection Photos Related

 Show Chart  New Inspection Photo  Add Existing Inspectio...  Refresh  Flow 

Inspection Photo Associated View

 Name  

Framing

Framing

Framing

Exercise 3: Funding Child flow

Task 1: Create child flow

Navigate to <https://make.powerapps.com/> and make sure you are in the Dev environment.

Select **Solutions** and open the **Construction Funding** solution.

Click **+ New** and select **Automation | Cloud flow | Instant**.

Enter **CF Manage Woodgrove Funding Process** for Flow name, select **Manually trigger a flow**, and click **Create**.







Build an instant cloud flow



Flow name

CF Manage Woodgrove Funding Process

Choose how to trigger this flow *

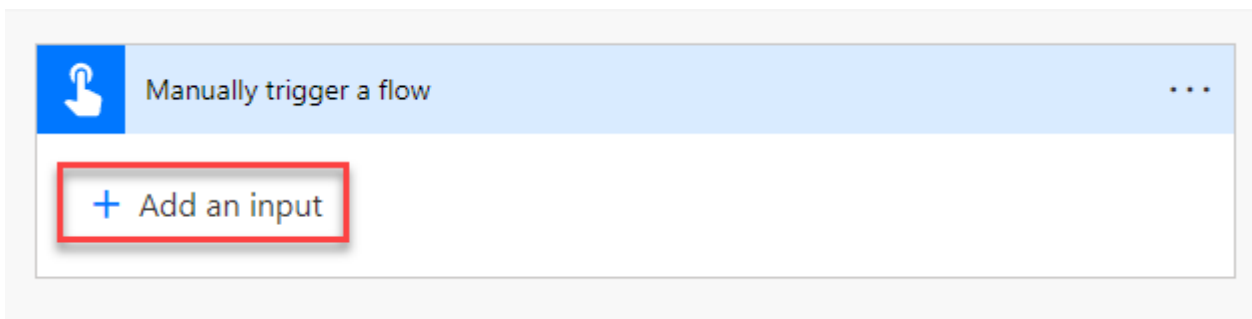
- ☒  Manually trigger a flow
Flow button for mobile 
-  PowerApps
PowerApps 
-  When Power Virtual Agents calls a fl...
Power Virtual Agents 

[Skip](#)

[Create](#)

[Cancel](#)

Expand the trigger and click **+ Add an input**.



Select **Text**.

Enter `LoanNumber` and click **+ Add an input** again.

Select **Text**.

Enter `LoanDrawID` and click **+ Add an input** again.

Select **Text**.

Enter `RequestedAmount` and click **+ Add an input** again.

Select **Text**.

Enter `InspectionJobID` and click **+ Add an input** again.

Select **Number**.

Enter `RiskScore`.

You should now have five inputs. Click **+ New step**.

Manually trigger a flow

LoanNumber Please enter your input

LoanDrawID Please enter your input

RequestedAmount Please enter your input

InspectionJobID Please enter your input

RiskScore Please enter a number

+ Add an input

+ New step Save

Select the **Run a flow built with Power Automate for desktop** action.

Choose an operation

run desktop

All Built-in Standard Premium Custom My clipboard

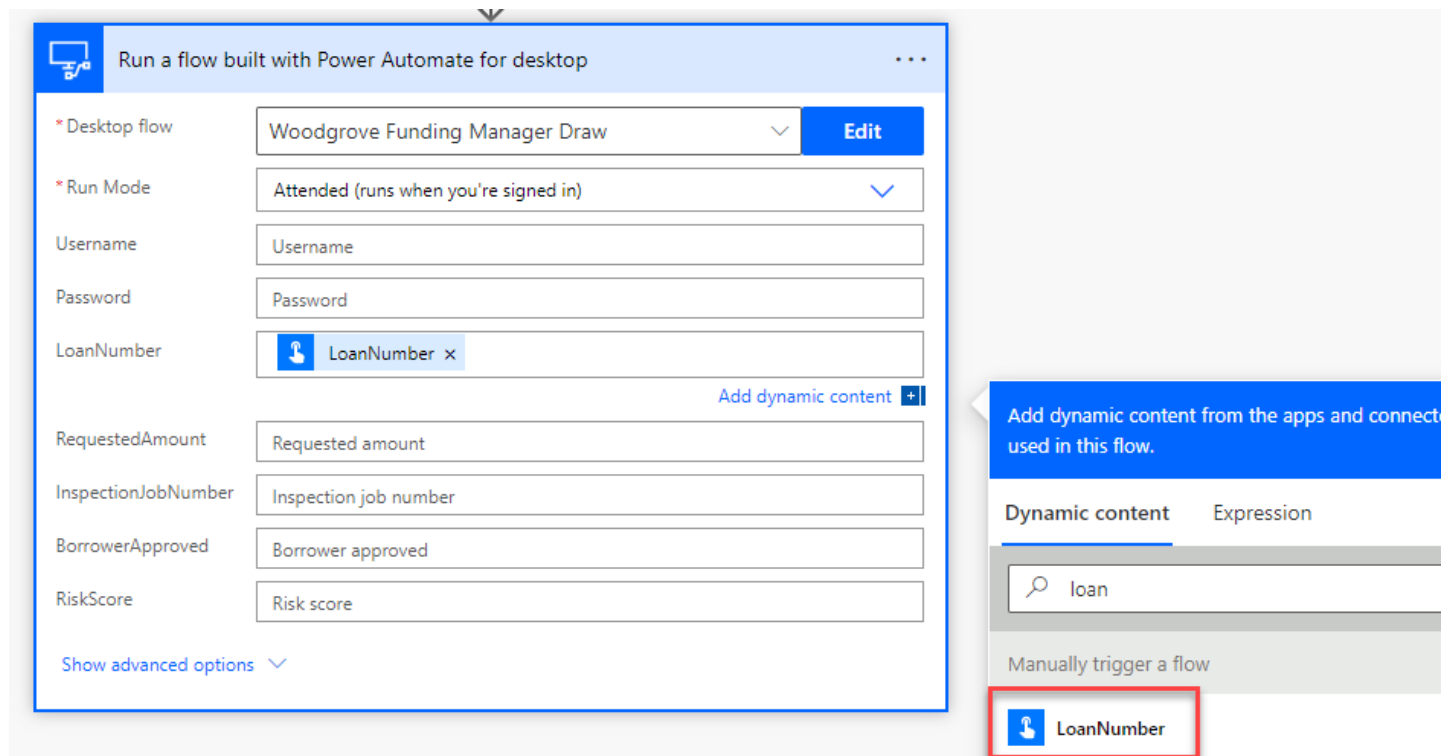
Triggers Actions See more

Run a flow built with Power Automate for desktop PREMIUM
Desktop flows

Run a flow built with Selenium IDE PREMIUM

Select **Woodgrove Funding Manager Draw** for Desktop flow and select **Attended** for Run Mode.

Click on the **LoanNumber** field and select **LoanNumber** from the dynamic content pane.



Click on the **RequestedAmount** field and select **RequestedAmount** from the dynamic content pane.

Click on the **InspectionJobNumber** field and select **InspectionJobID** from the dynamic content pane.

Type **Yes** for BorrowerApproved.

Click on the **RiskScore** field and select **RiskScore** from the dynamic content pane.

Enter your name for Username, pass@word1 for Password.

The run desktop flow should now look like the image below. Click **+ New step**.

Run a flow built with Power Automate for desktop

* Desktop flow: Woodgrove Funding Manager Draw Edit

* Run Mode: Attended (runs when you're signed in) ▼

Username: jane

Password: pass@word1

LoanNumber: LoanNumber ×

RequestedAmount: RequestedAmo... ×

InspectionJobNumber: InspectionJobID ×

BorrowerApproved: Yes

RiskScore: RiskScore ×

[Show advanced options](#) ▼

+ New step Save

Select the **Condition** action from the **Control** connector.

Click on the first operand and select **FundingStatus** from the dynamic content pane.

Condition

Funding... is equal to Choose a value

[Add dynamic content](#) +

+ Add ▼

[Add an action](#)

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

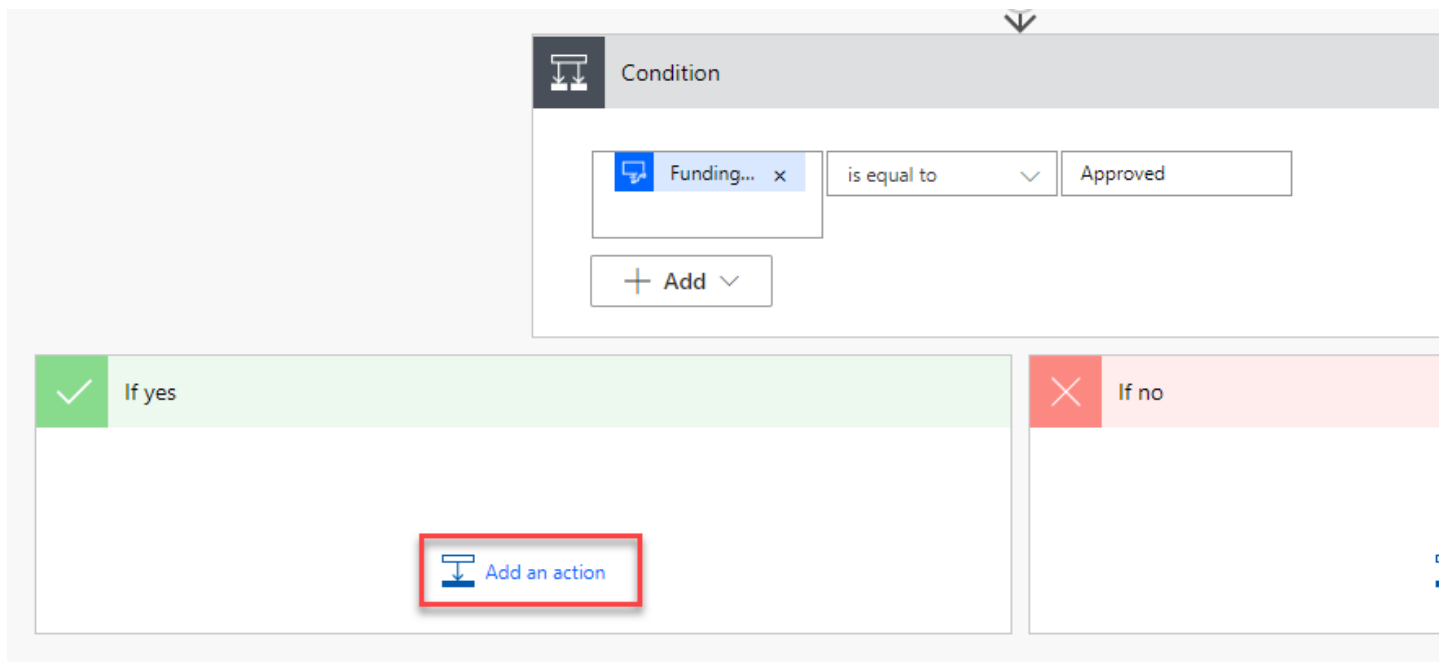
Dynamic content **Expression**

Run a flow built with Power Automate for desktop

FundingStatus
Funding status

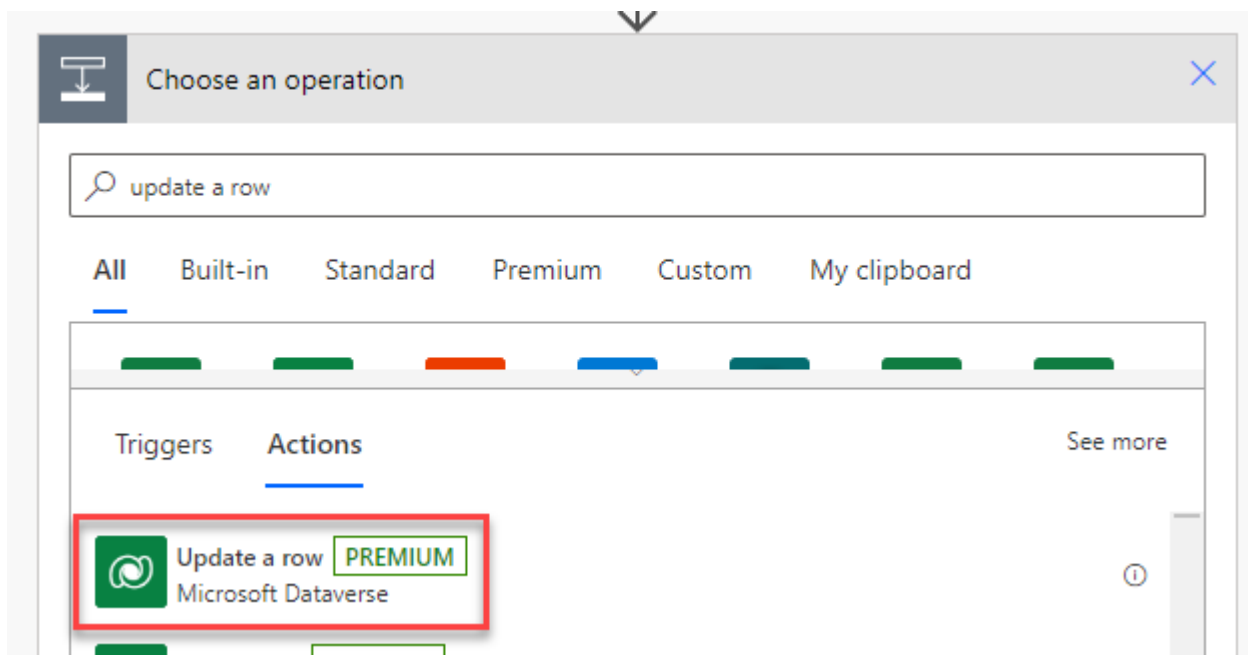
Select **is equal to** for operator and enter Approved for the second operand.

Go to the **If yes** branch and click **Add an action**.



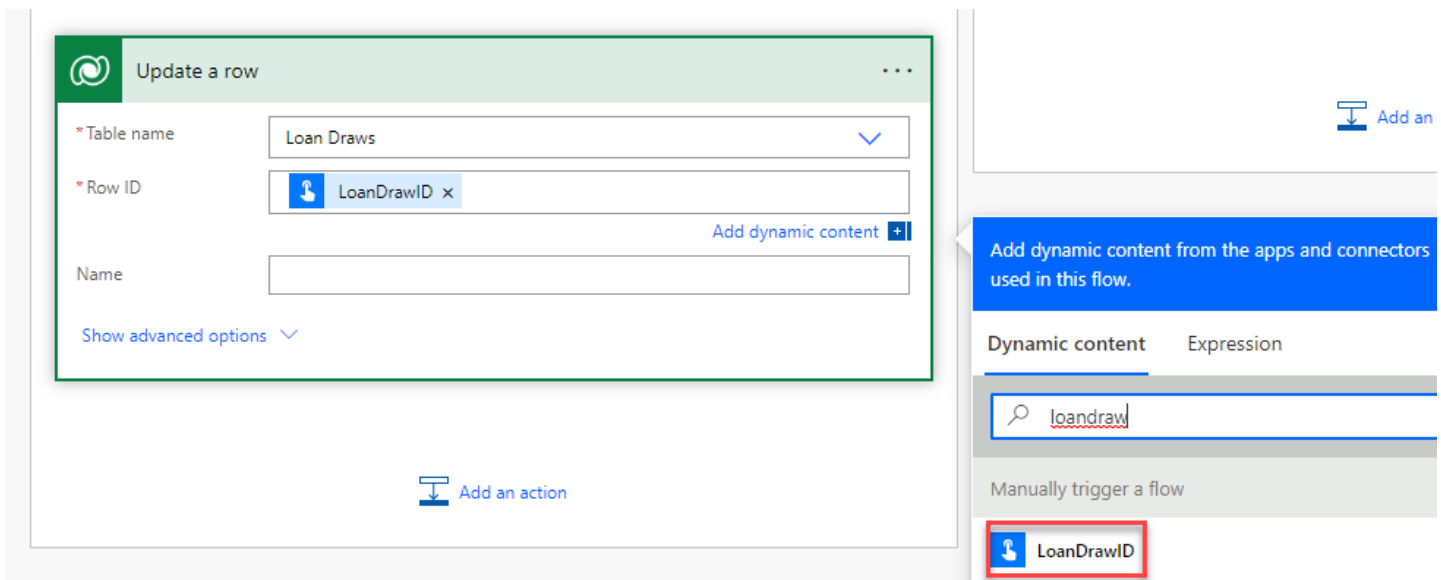
The screenshot shows the 'Condition' configuration window. The condition is 'Funding...' is equal to 'Approved'. Below the condition, there are two branches: 'If yes' (green) and 'If no' (red). The 'If yes' branch contains an 'Add an action' button, which is highlighted with a red rectangle.

Select the **Update a row** action from the **Microsoft Dataverse** connector.



The screenshot shows the 'Choose an operation' window. The search bar contains 'update a row'. The 'All' tab is selected. The 'Update a row' action from the 'Microsoft Dataverse' connector is highlighted with a red rectangle.

Select **Loan Draws** for Table name, click on the Row ID field and select **LoanDrawID** from the dynamic content pane.

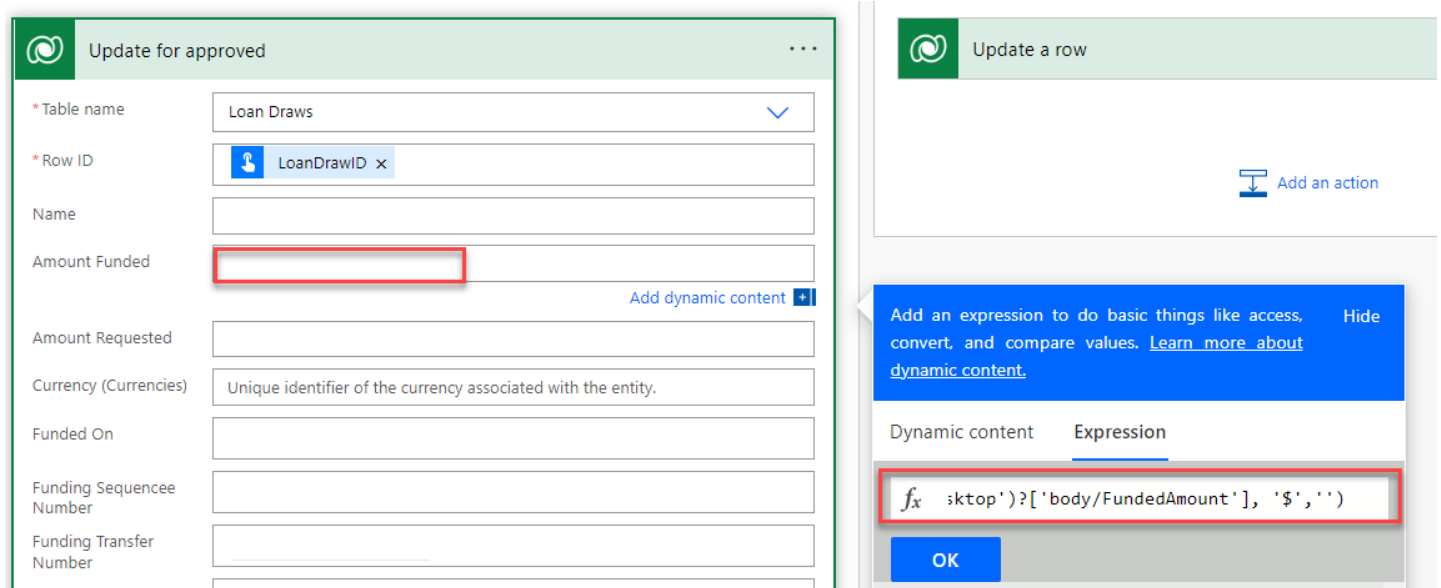


Click **Show advanced options**.

Click on the **Amount Funded** field and go to the dynamic content pane and select the **Expression** tab.

Paste the expression below and click **OK**.

`replace(outputs('Run_a_flow_built_with_Power_Automate_for_desktop')?['body/FundedAmount'], '$', '')`



Click on the **Funded On** field, go to the dynamic content pane, and select the **Expression** tab.

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

Currency (Currencies)	Unique identifier of the currency associated with the entity.
Funded On	<div><div></div></div>
	Add dynamic content +
Funding Sequence Number	<div></div>
Funding Transfer Number	<div></div>
Inspected On	<div></div>
Inspection Job	<div></div>
Loan (Loans)	<div></div>
Owner (Owners)	Owner Id

Add an expression to do basic things like add, subtract, multiply, divide, convert, and compare values. [Learn more about dynamic content.](#)

Dynamic content	Expression
<div><div></div></div>	<div><div>fx</div> utcNow()</div>

[OK](#)

Click on the **Funding Sequence Number** field and select **FundSequenceNumber** from the dynamic content pane.

Click on the **Funding Transfer Number** field and select **FundTransferNumber** form the dynamic content pane.

Click on the **RiskScore** field and select **RiskScore** form the dynamic content pane.

Select **Funding Approved** for Status Reason and click **Hide advanced options**.

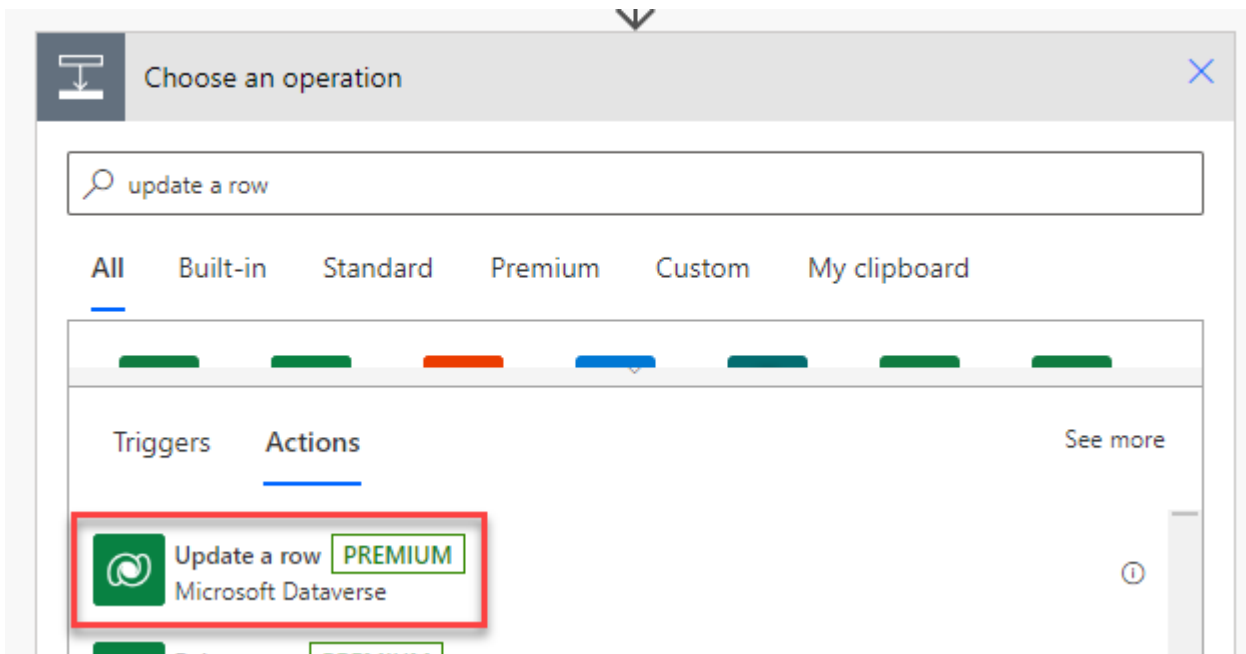
Owner (Owners)	Owner Id
Requested On	<div></div>
Risk Score	<div><div></div> RiskScore x</div>
Status	Status of the Loan Draw ▼
Status Reason	Funding Approved ▼
Time Zone Rule Version Number	For internal use only.
UTC Conversion Time Zone Code	Time zone code that was in use when the record was created.
<div>Hide advanced options ^</div>	

Rename the step **Update for approved**.

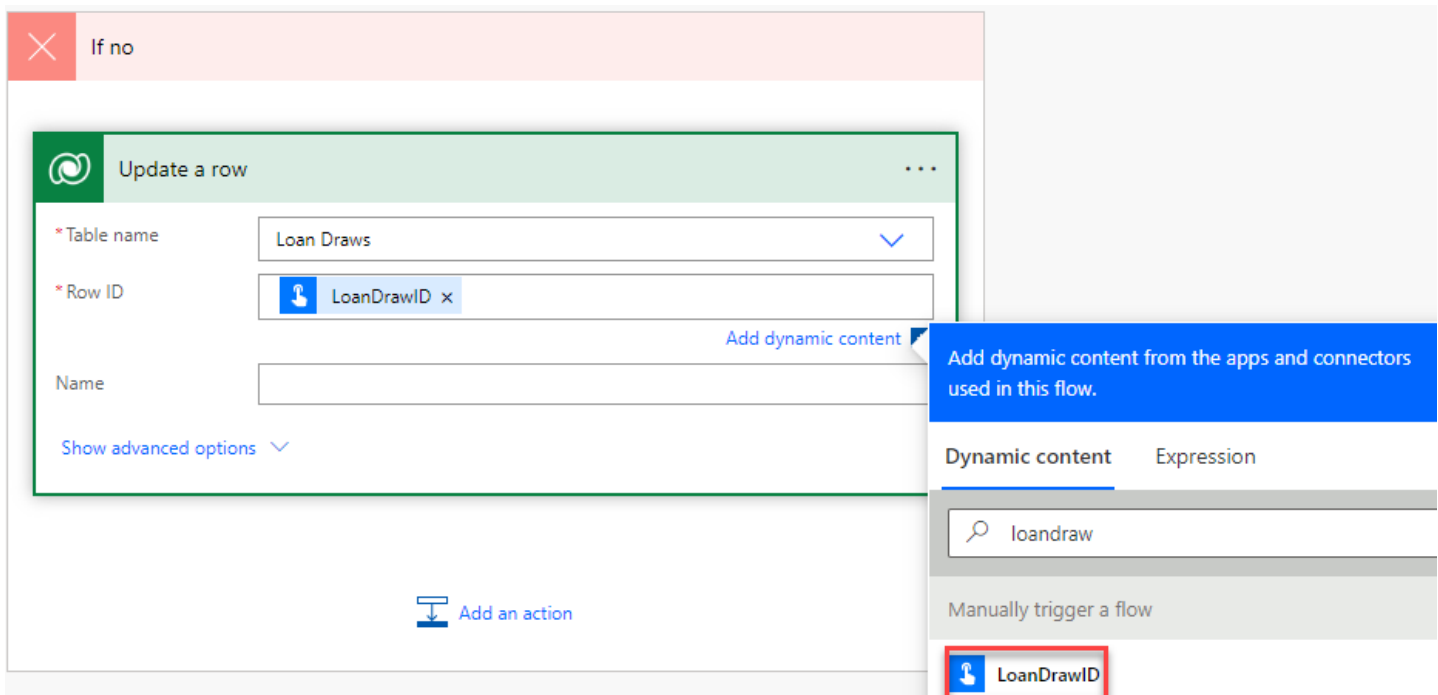
Go to the **If no** branch and click **Add an action**.

<div> <div>✓</div> <div>If yes</div> </div> <div> <div><div></div></div> <div>Update for approved</div> <div>...</div> </div>	<div> <div>✗</div> <div>If no</div> </div> <div> <div><div></div></div> <div>Add an action</div> </div>
-------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------

Select the **Update a row** action from the **Microsoft Dataverse** connector.




Select **Loan Draws** for Table name, click on the Row ID field and select **LoanDrawID** from the dynamic content pane.




Click **Show advanced options**.

Select **Funding Denied** for Status Reason and click **+ New step**.

Risk Score
 Status
 Status Reason
 Time Zone Rule Version Number
 UTC Conversion Time Zone Code
[Hide advanced options](#) ^


 [Add an action](#)


Select the **Respond to PowerApps or flow** action from the **PowerApps** connector.

 Choose an operation ✕

[All](#)
[Built-in](#)
[Standard](#)
[Premium](#)
[Custom](#)
[My clipboard](#)

[Triggers](#)
[Actions](#)
[See more](#)

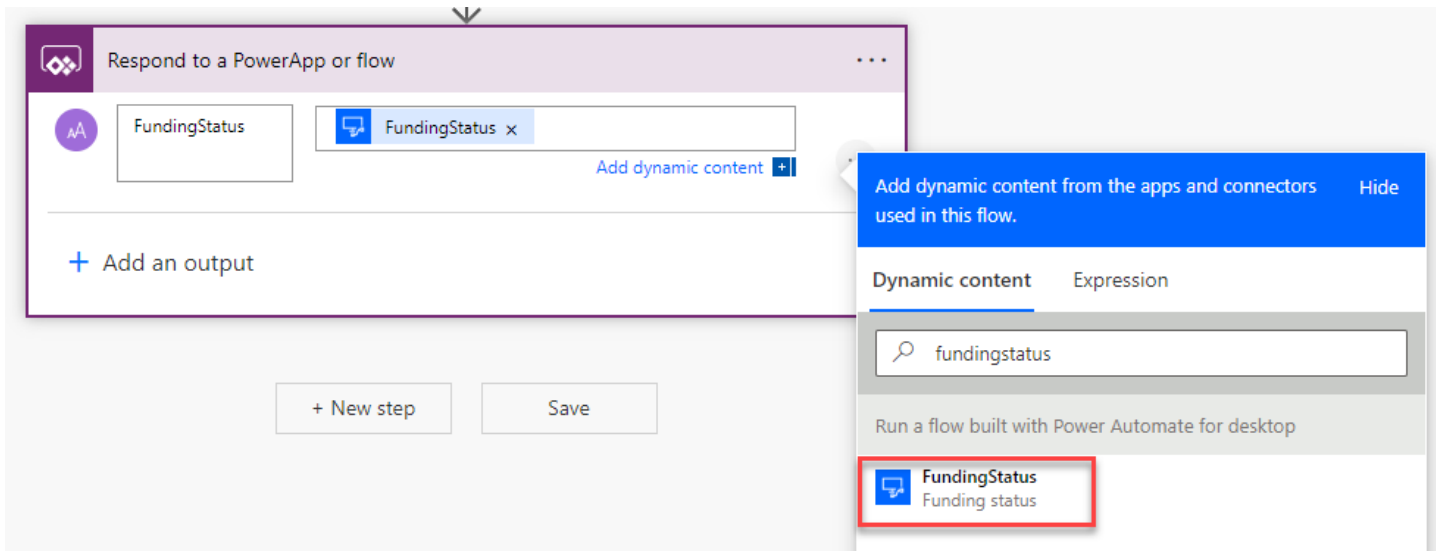
 Respond to a PowerApp or flow
PowerApps

 Send email with options
Office 365 Outlook

Click **+ Add an output**.

Select **Text**.

Enter `FundingStatus`, click on the value field and select **FundingStatus** from the dynamic content pane.



Click **Save** and wait for the flow to be saved.

Click **Test**.

Select **Manually** and click **Test** again.

Click **Continue**.

Enter JG7165 for LoanNumber, paste the id you copied in the previous exercise for LoanDrawID, enter 80000 for RequestedAmount, enter 123 for InspectionJobID, enter 50 for RiskScore, and click **Run flow**.

Run flow

CF Manage Woodgrove Funding Process

Owner: User1-49914711

LoanNumber *

JG7165

LoanDrawID *

3a6c23ab-370f-f011-9988-6045bd01b3a9

RequestedAmount *

80000

InspectionJobID *

123

RiskScore *

50

This flow uses Desktop flows, and Microsoft Dataverse.
[Review connections and actions](#)

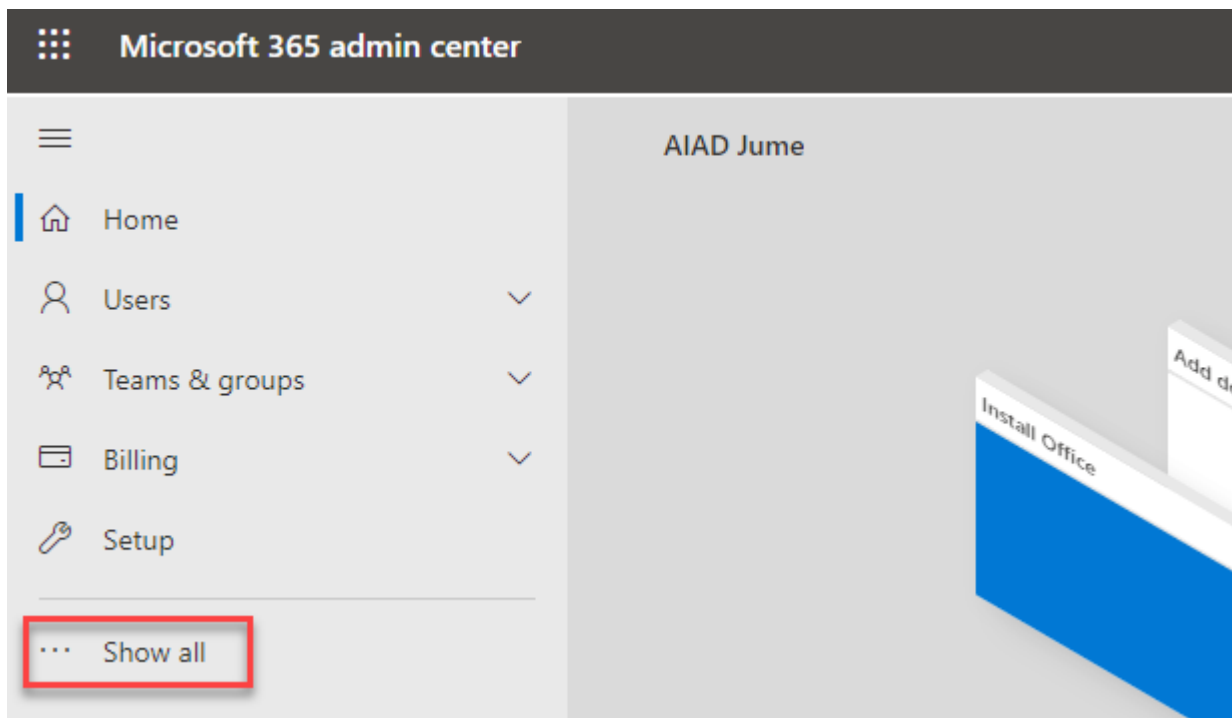
Run flowCancel

Wait for the flow run to complete, the flow run should succeed. Click **Done** to review the flow run history.

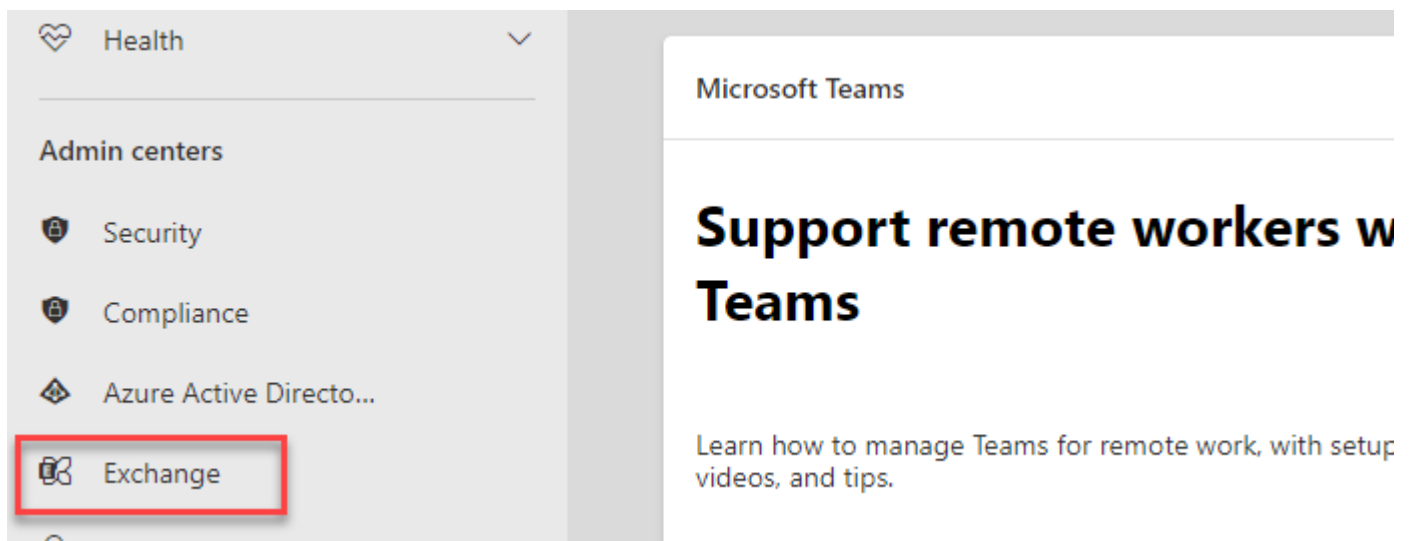
Exercise 4: Build Overall Process Flow

Task 1: Create a shared mailbox

Navigate to <https://admin.microsoft.com/> and click **Show all**.



Go to the **Admin centers** area and select **Exchange**.




In the left side menu under **Recipients** select **Mailboxes**.


Click **+ Add a shared mailbox**.


Manage mailboxes

Create and manage settings for shared mailboxes. You can also manage settings for user mailboxes, but to add or delete them you must go to the [Microsoft 365 admin center](#) and do this on the **active users** page. [Learn more about mailboxes](#)

+ Add a shared mailbox

 Mailflow setting

 Refresh

 Export mailboxes

<input type="checkbox"/> Display name ↑	Email address	Recipient type
<input type="checkbox"/> First Last	admin@juneenv.onmicrosoft.com	UserMailbox

Enter Funding for Display name, **Funding** for Email address, select your domain, and click **Create**.

Add a shared mailbox

Email can be sent to and from the name and email address of the shared mailbox, rather than an individual. After you create the shared mailbox, you can add members who can read and reply to email.

Display Name *

Email address *

@

juneenv.onmicros... ▾

Alias

Create

Click **Add users to this mailbox**.



Shared mailbox created successfully

The shared mailbox was created. It may take a few minutes before you can add members.

Next steps

[Edit details for this mailbox](#)

[Add users to this mailbox](#)

[Learn how to use shared mailboxes in outlook](#)

(You can share this link with users.)

Would you like to know more?

Click **+ Add members**.

Select your user and click **Save**. You may add other users to the shared mailbox.

Manage shared mailbox members

The Full Access permission allows a delegate to open this mailbox and behave as the mailbox owner.

Added(1)



admin



Display Name



MOD Administrator

admin@M365x04072213.onmicrosoft.com

Save

Click **Confirm**.

Close the shared mailbox pane.









Task 2: Create flow

Navigate to <https://make.powerapps.com/> and make sure you are in the Dev environment.

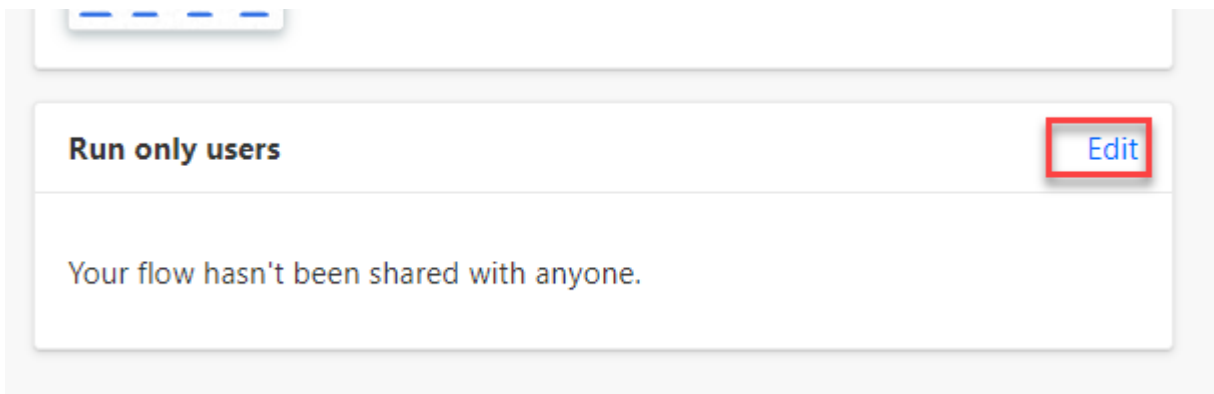
Select **Solutions** and open the **Construction Funding** solution.

Locate and open the **CF Manage Inspection Process** child flow.

Builder Risk Service > **All**

	Display name ↑ ↓		Name ↓
	Builder Risk Service		rc_5Fbuilder-20risk-20service
	CF Lookup Loan		CF Lookup Loan
	CF Manage Inspection Process		CF Manage Inspection Process
	CF Manage Woodgrove Funding Process		CF Manage Woodgrove Funding Process

Go to the **Run only users** section and click **Edit**.



Select the desktop connection you created and click **OK** on the popup.

Click **Save**.

Connections Used

These connections will provide the users listed here to have run-only access to this flow. Unless providing their own connection, run-only users will not have access to these connections outside this flow.



Desktop flows

Run-only users will be asked to provide their own connection to this connector.

Use this connection



Microsoft Dataverse

Access to this connection is provided by the owner of the flow.

Use this connection (admin@juneenv.onmicrosoft.com)











Save

Cancel

Click on the browser back button.

Locate and open the **CF Manage Woodgrove Funding Process** child flow.

Builder Risk Service > All

	Display name ↑ ▾		Name ▾
	Builder Risk Service		rc_5Fbuilder-20risk-20service
	CF Lookup Loan		CF Lookup Loan
	CF Manage Inspection Process		CF Manage Inspection Process
	CF Manage Woodgrove Funding Process		CF Manage Woodgrove Funding Process

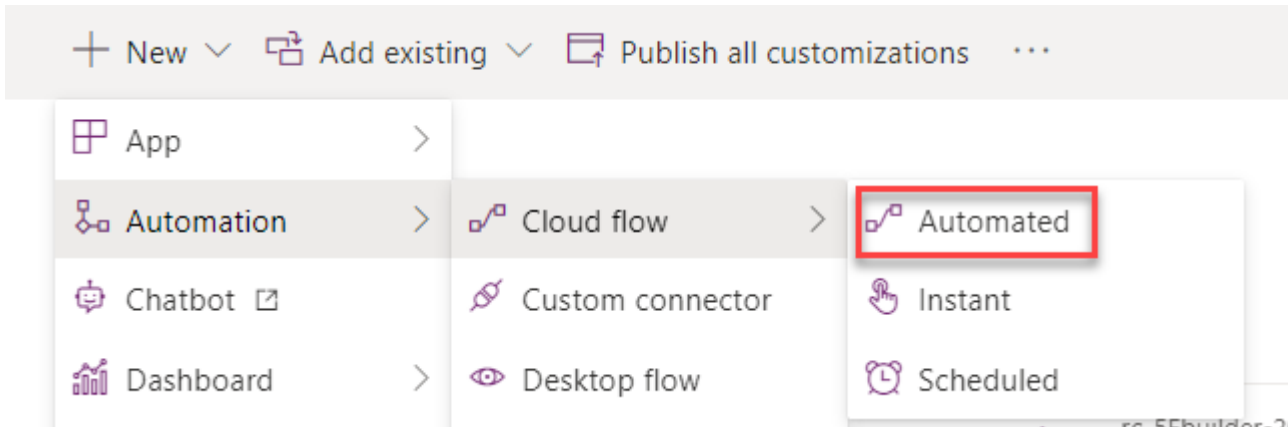
Go to the **Run only users** section and click **Edit**.

Select the desktop connection you created and click **OK** on the popup.

Click **Save**.

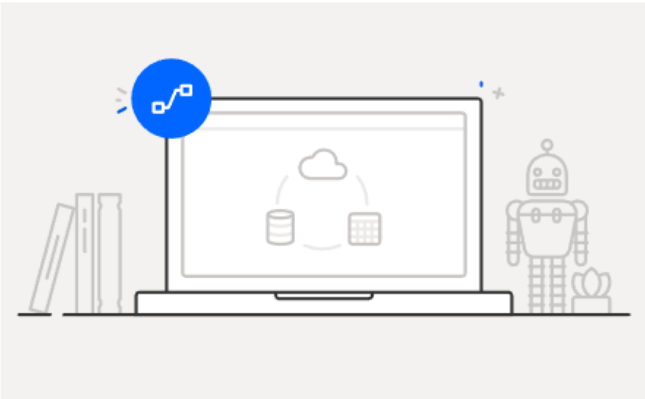
Click on the browser back button.

Click **+ New** and select **Automation | Cloud flow | Automated**.



Enter **Process Construction Funding Request** for Flow name, select the **When a new email arrives in a shared mailbox** trigger, and click **Create**.


Build an automated cloud flow ✕




Flow name

Choose your flow's trigger * ⓘ

☒

 When a new email arrives in a shared ...
Office 365 Outlook ⓘ

☐

 When an update is shared
Buffer ⓘ



[Skip](#)





[Create](#)


[Cancel](#)

Select the **Funding** shared email you created for **Original Mailbox Address**, select **Inbox** for Folder, and click **Show advanced options**.

Select **Yes** for Include attachments and click on the ... button of the trigger.

 When a new email arrives in a shared mailbox (V2) 

* Original Mailbox Address	<input type="text" value="Funding x ;"/>
Folder	<input type="text" value="Inbox"/> 
To	<input type="text" value="Recipient email addresses separated by semicolons (If any match, the"/>
CC	<input type="text" value="CC recipient email addresses separated by semicolons (If any match,"/>
To or CC	<input type="text" value="To or CC recipient email addresses separated by semicolons (If any r"/>
From	<input type="text" value="Sender email addresses separated by semicolons (If any match, the t"/>
Importance	<input type="text" value="Any"/> 
Only with Attachments	<input type="text" value="No"/> 
Include Attachments	<input type="text" value="Yes"/> 
Subject Filter	<input type="text" value="String to look for in the subject line."/>



[Hide advanced options](#) 

Select **Rename**.

Rename the trigger to **When a new funding request email arrives**.


Click **+ New step**.


Select the **Run a Child Flow** action from the **Flows** connector.

 Choose an operation 

AllBuilt-inStandardPremiumCustomMy clipboard

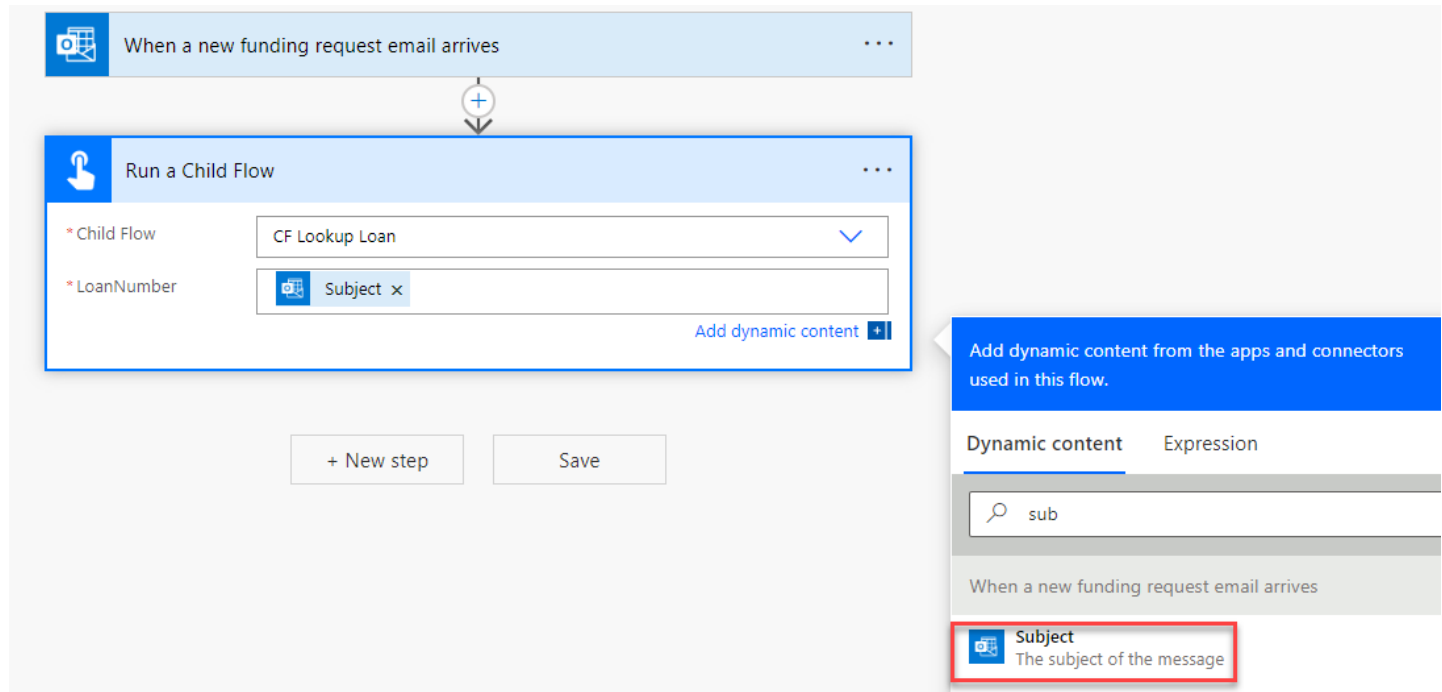
TriggersActions

 Run a Child Flow
Flows



Select **CF Lookup Loan** for Child flow.

Click on the **LoanNumber** field, go to the dynamic content pane, and select **Subject**.

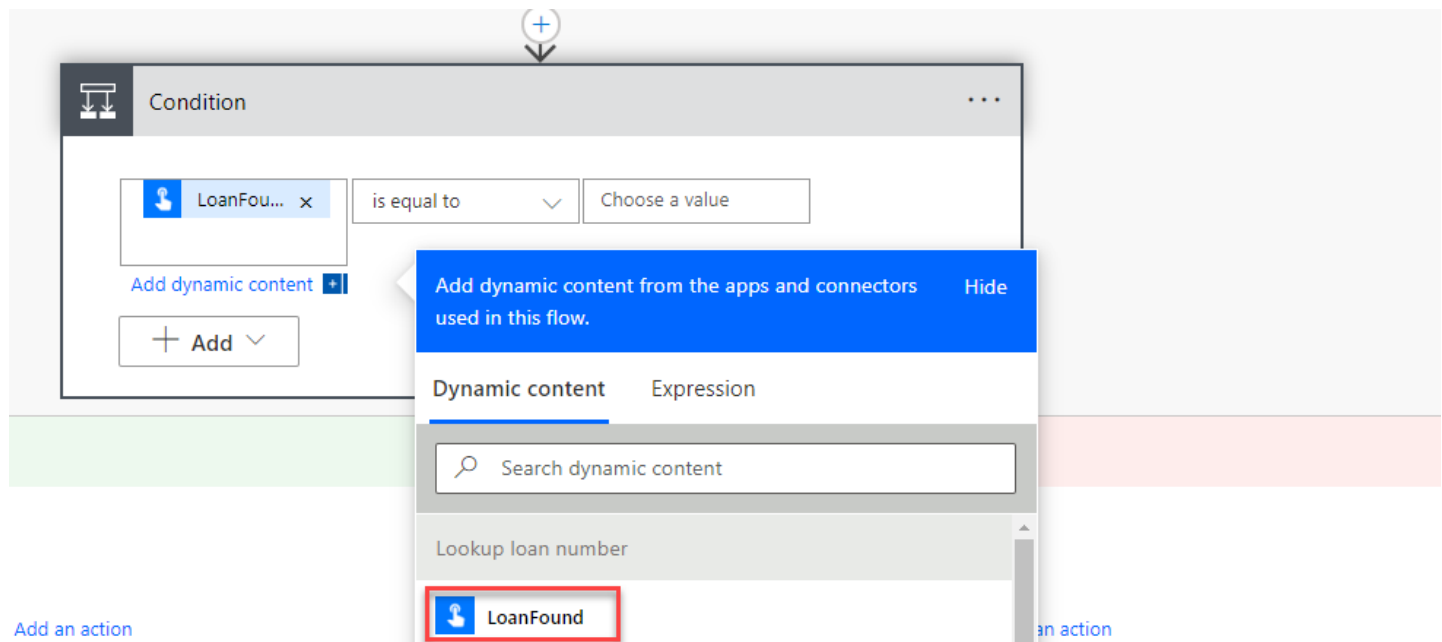


Rename the step **Lookup loan number**.

Click **+ New step**.

Select the **Condition** action from the **Control** connector.

Click to select the first operand field, go to the dynamic content pane, and select **LoanFound**.

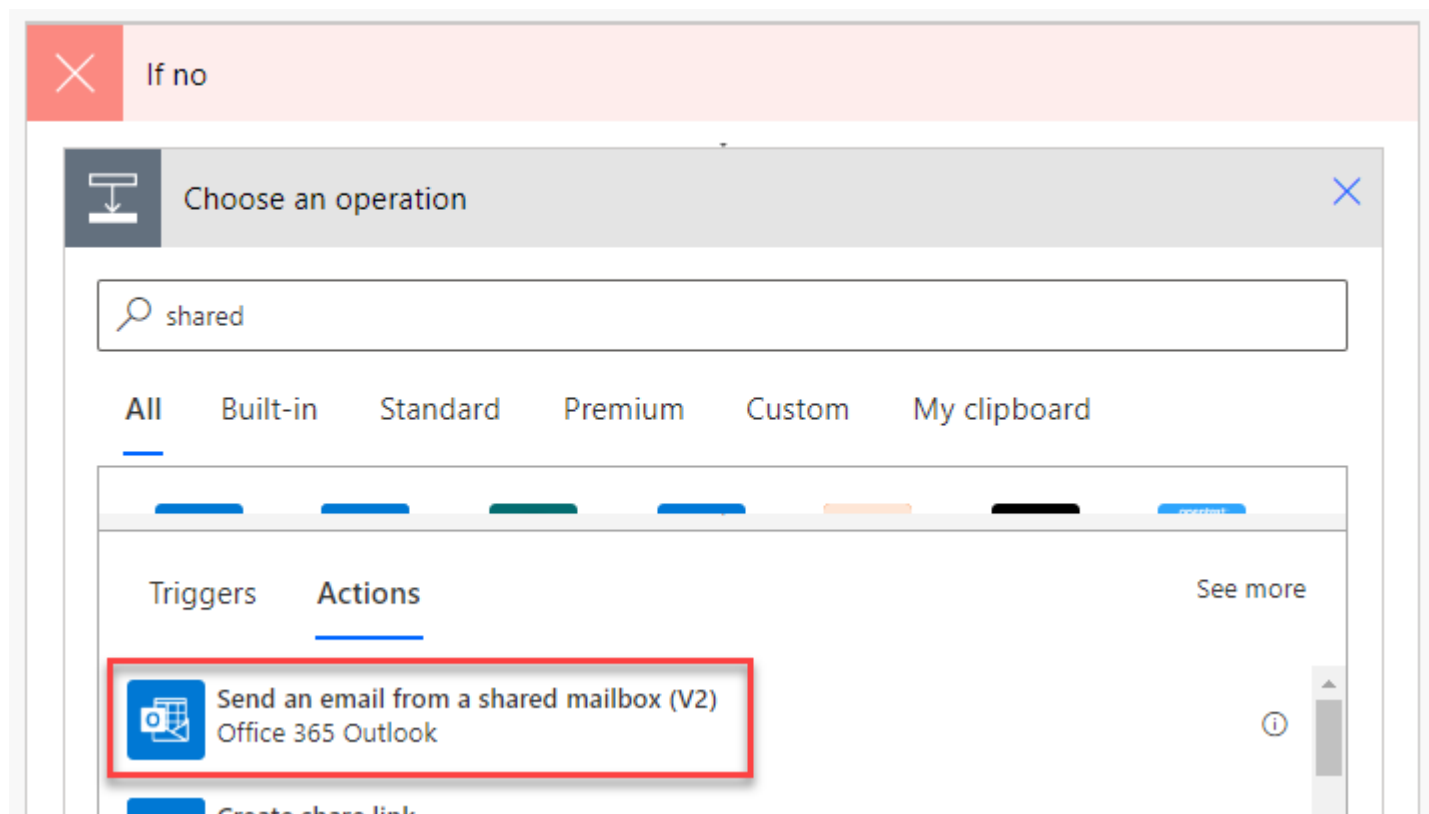


Select **is equal to** for the operator and type True for the second operand field.

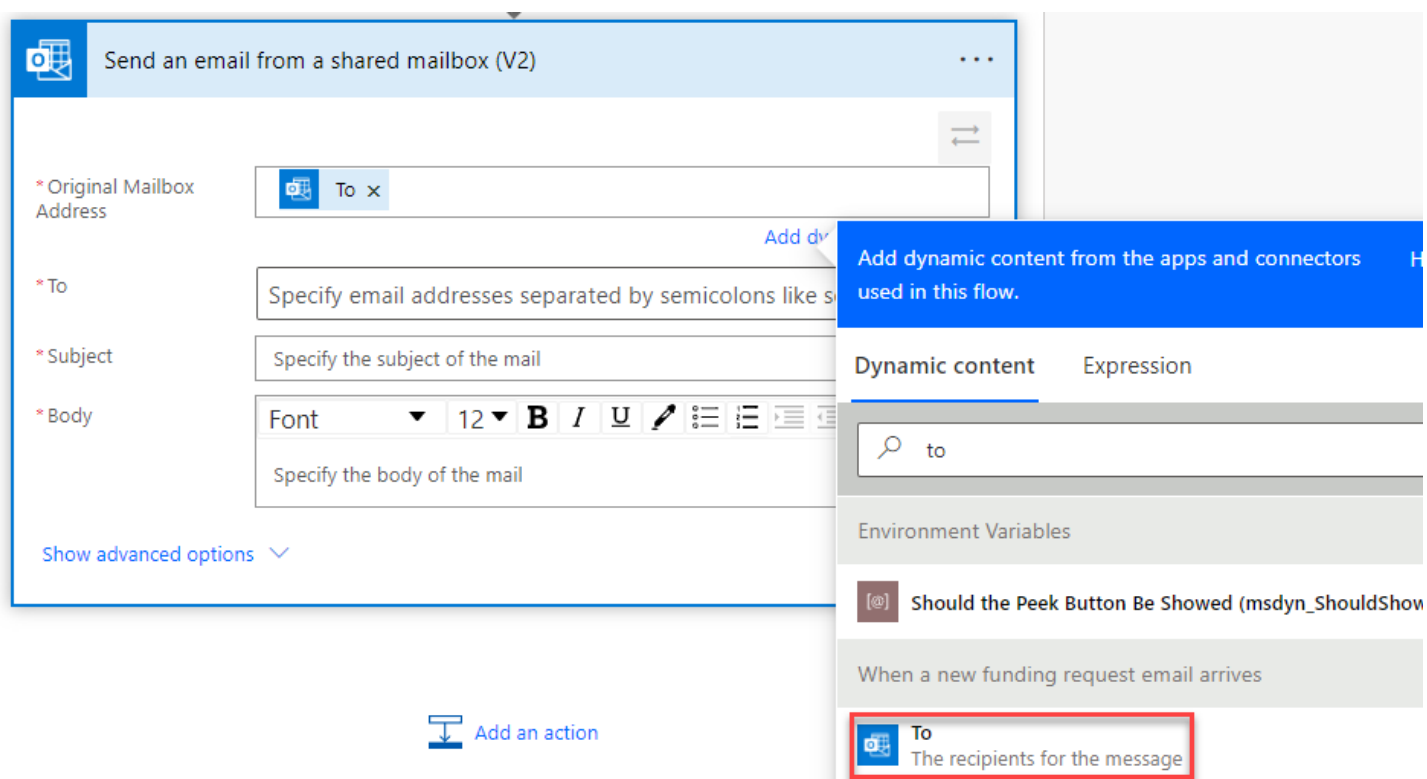
Rename the condition **Check if loan number found**.

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

Select the **Send an email from a shared mailbox (V2)** action from the **Office 365 Outlook** connector.



Click on the **Original mailbox Address**, click **Add dynamic content** and select **To** from the dynamic content pane.



Click on the **To** field, click **Add dynamics content** and select **From** from the dynamic content pane.

Type `Loan number not found` for Subject.

Type `Loan \#` Body and select **Subject** from the dynamic content pane.

Send an email from a shared mailbox (V2)

* Original Mailbox Address: To x

* To: From x

* Subject: Loan number not found

* Body: Font 12 B I U [icons] Loan # Subject x

Show advanced options ▾

Add dynamic content

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

Dynamic content Expression

subject

When a new funding request email arrives

Subject
The subject of the message

Add not found, contact your bank. to the body.

Rename the reply **Send loan not found email** and click **Add an action**.

Send loan not found email

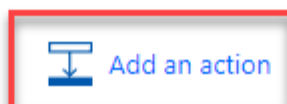
* Original Mailbox Address: To x

* To: From x

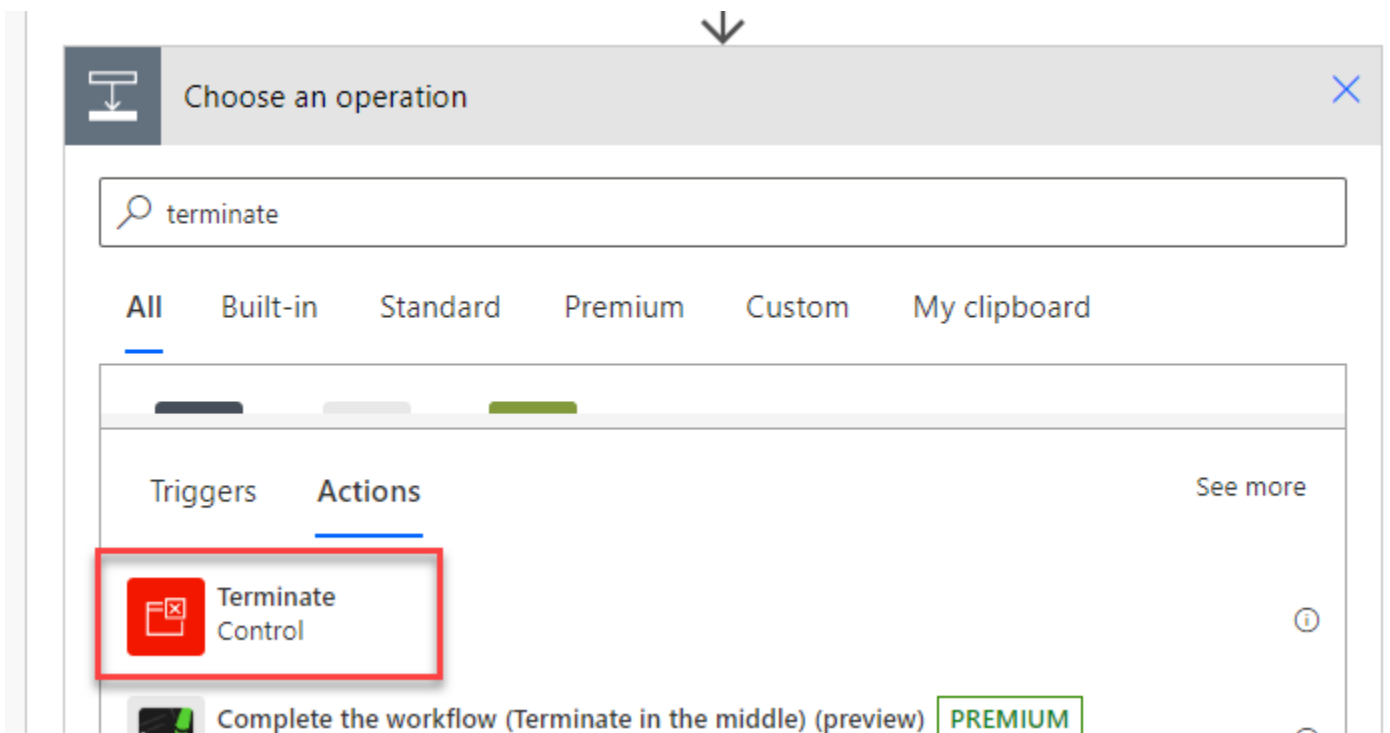
* Subject: Loan number not found

* Body: Font 12 B I U [icons] Loan # Subject x not found, contact bank.

Show advanced options ▾

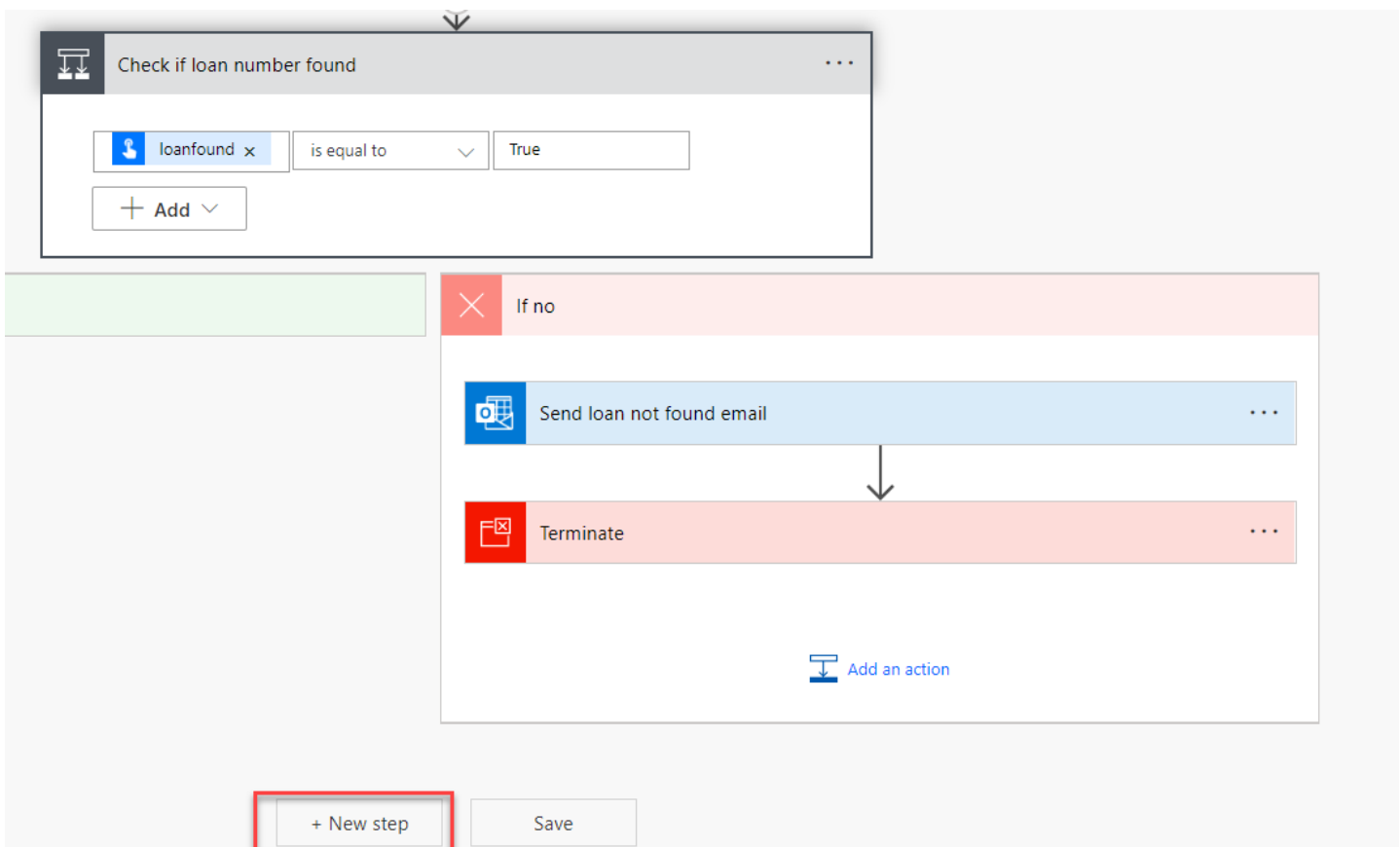


Select the **Terminate** action from the **Control** connector.

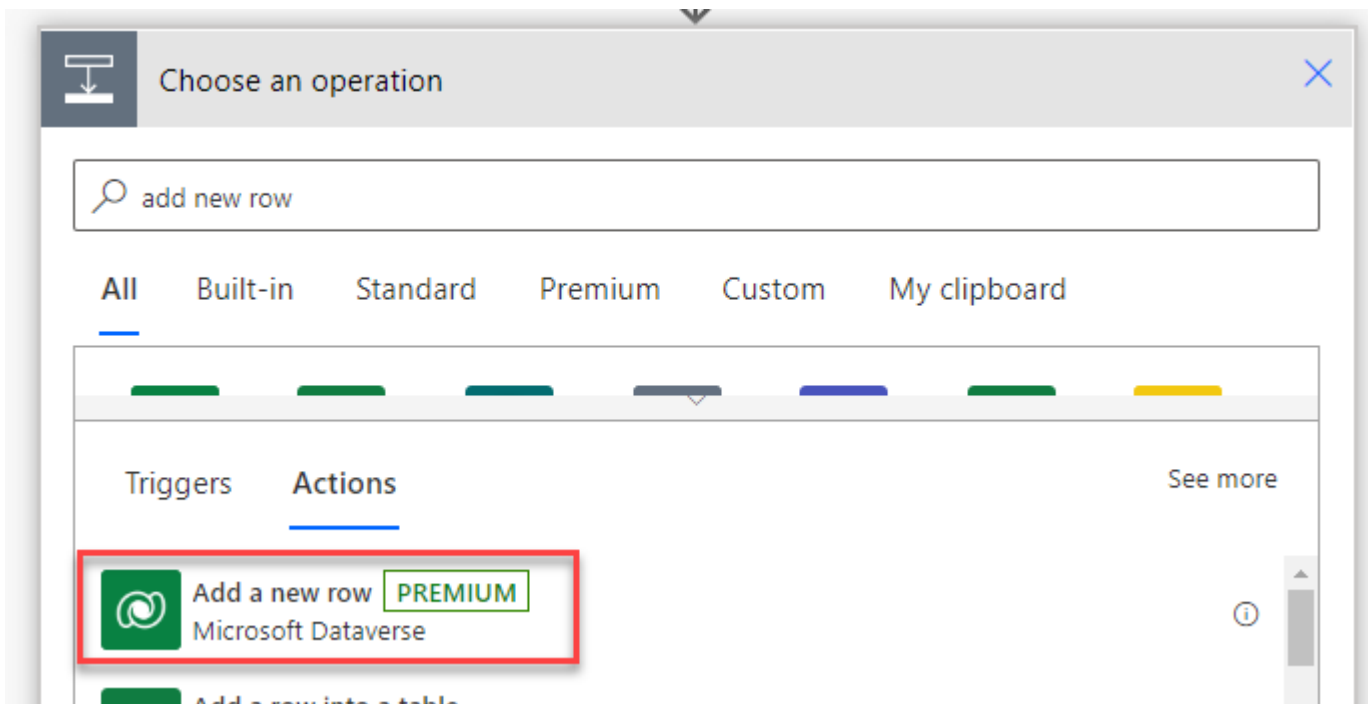


Select **Succeeded** for Status.

Click **+ New step**.



Select the **Add a new row** action from the **Microsoft Dataverse** connector.






Select **Loan Draws** for Table name.



Enter **Loan draw** for Name and click **Show advanced options**.

Enter 80000 for Amount Requested.

Type **rc_loans()** for Loan (Loans), place your cursor inside the parentheses, and select **LoanID** from the dynamic content pane.

Inspection Job	
Loan (Loans)	rc_loans( LoanID x)
	Add dynamic content 
Loan Draw	Unique identifier for entity instances
Owner (Owners)	Owner Id
Record Created On	Date and time that the record was migrated.
Requested On	
Risk Score	
Status Reason	Reason for the status of the Loan Draw 
Time Zone Rule Version Number	For internal use only.
UTC Conversion Time Zone Code	Time zone code that was in use when the record was created.

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

Dynamic content	Expression
<input type="text" value="Search dynamic content"/>	
Lookup loan number	
	LoanFound
	LoanID

Rename the step **Create new loan draw row**.


Click **+ New step**.




Select the **Run a Child Flow** action from the **Flows** connector.

Select **CF Manage Inspection Process** for Child flow.


Enter `123 Main Street` for PropertyAddress.

Click on the **LoanDrawID** field and select **Loan Draw** from the dynamic content pane.


Run inspection process

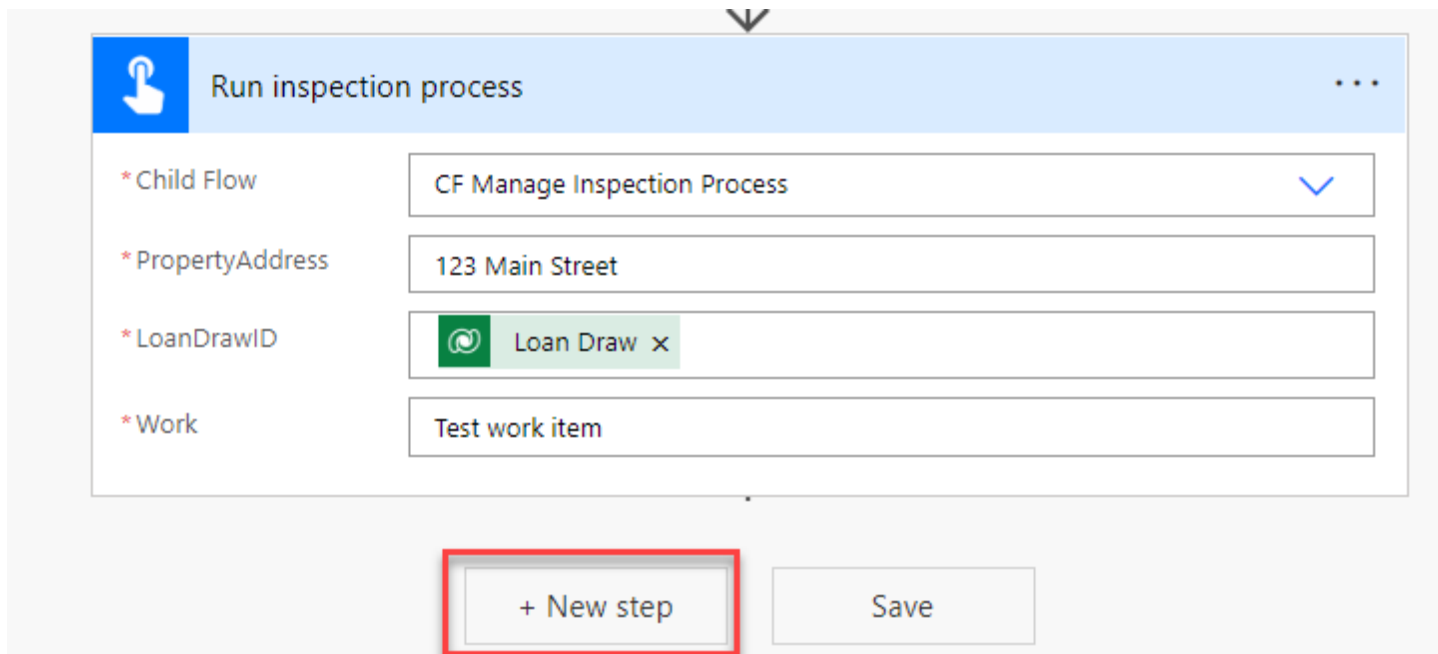
* Child Flow	CF Manage Inspection Process 
* PropertyAddress	123 Main Street
* LoanDrawID	 Loan Draw x Add dynamic content 
* Work	Please enter your input

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

Dynamic content	Expression
<input type="text" value="loan draw"/>	
Create new loan draw row	
	Loan Draw Unique identifier for entity instances

Enter `Test work item` for Work.

Rename the child flow **Run inspection process** and click **+ New step**.



Run inspection process

* Child Flow CF Manage Inspection Process

* PropertyAddress 123 Main Street

* LoanDrawID Loan Draw x

* Work Test work item

+ New step Save

Select the **Run a Child Flow** action from the **Flows** connector.

Select **CF Manage Woodgrove Funding Process** for Child flow.

Click on the **LoanNumber** field and select **Subject** from the dynamic content pane.

Click on the **LoanDrawID** field and select **Loan Draw** from the dynamic content pane.

Enter 80000 for RequestedAmount.

Click on the **InspectionJobID** field and select **JobNumber** from the dynamic content pane.

Enter 55 for **RiskScore**.

Rename the child flow **Run funding process**. Click **Save**.

Click **+ New step**.

Run funding process

- * Child Flow: CF Manage Woodgrove Funding Process
- * LoanNumber: Subject
- * LoanDrawID: Loan Draw
- * RequestedAmount: 80000
- * InspectionJobID: jobnumber
- * RiskScore: 55

+ New step Save

Select the **Condition** action from the **Control** connector.

Click on the first operand and select **FundingStatus** from the dynamic content pane.

Condition

Funding... is equal to Choose a value

Add dynamic content +

+ Add

Dynamic content Expression

Search dynamic content

Should the Peek Button Be Showed (msdyn_ShouldSho...

Run funding process

FundingStatus

Select **is equals to** for operator and enter **Approved** for the second operand.

Rename the condition **Check approval status**.

Go to the **If yes** branch and click **Add an action**.

Check approval status

Funding... is equal to Approved

+ Add

✓ If yes

✗ If no

Add an action

Select the **Send an email from a shared mailbox (V2)** action from the **Office 365 Outlook** connector.

Click on the **Original Mailbox Address** field, click **Add dynamic content** and select **To** from the dynamic content pane.

Click on the **To** field, click **Add dynamics content** and select **From** from the dynamic content pane.

Enter Draw Approved for Subject.

Type Your draw for in the Body and select **Amount Funded** from the dynamic content pane.

Send an email from a shared mailbox (V2)

* Original Mailbox Address: To

* To: From

* Subject: Funding Approved

* Body: Your draw for Amount Funded

Add dynamic content

Show advanced options

Add an action

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

Dynamic content Expression

amount funded

Create new loan draw row

Amount Funded

Add was approved to the body.

Rename the step **Send approved draw email**.

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

✓ If yes

Send approved draw email

* Original Mailbox Address: To x

* To: From x

* Subject: Funding Approved

* Body: Font 12 B I U [icons] Your draw for Amount Funded x was approved

Show advanced options

✗ If no

Add an action

Select the **Send an email from a shared mailbox (V2)** action from the **Office 365 Outlook** connector.

Click on the **Original Mailbox Address** field, click **Add dynamic content** and select **To** from the dynamic content pane.

Click on the **To** field, click **Add dynamic content** and select **From** from the dynamic content pane.

Enter Draw was not approved for Subject.

Type Your draw for in the Body and select **Amount Funded** from the dynamic content pane.

Add was not approved, please contact bank. to the body.

Rename the step **Send draw not approved email**.

Click **Save** and wait for the flow to be saved.

✓ If yes

Send approved draw email

Add an action

✗ If no

Send draw not approved email

* Original Mailbox Address: To x

* To: From x

* Subject: Draw was not approved

* Body: Font 12 B I U [icons] Your draw for Amount Funded x was not approved, please contact bank

Show advanced options

Add an action

+ New step

Save

Task 3: Test flow

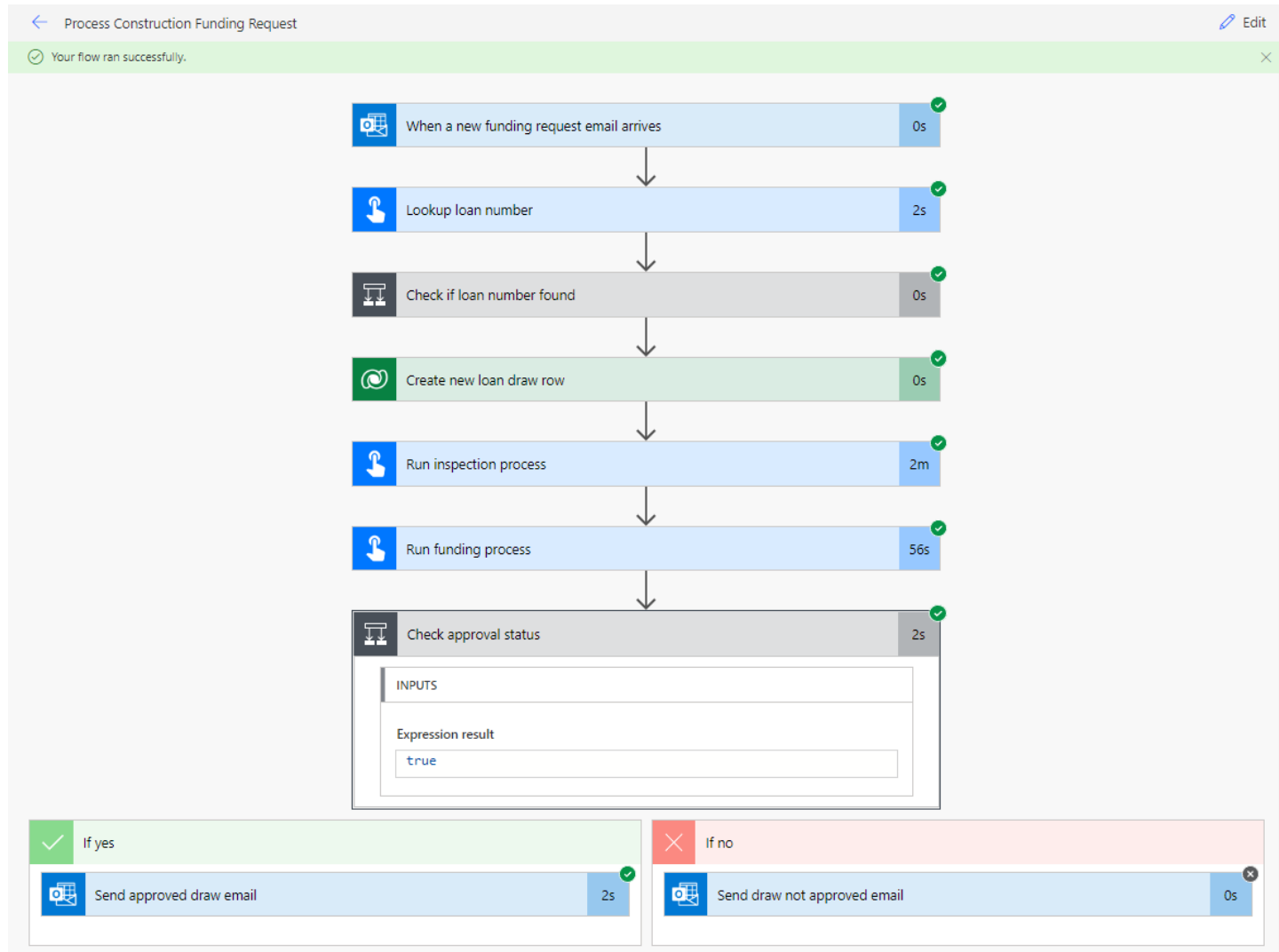
Click **Test**.

Select **Manually** and click **Test** again.

Send an email with the subject **MC3747** from your email to the Funding shared email you created (Funding@yourdomain.onmicrosoft.com).

Wait for the flow to get triggered. Do not interact your computer while the flow is running.

The flow should run successfully.



You should receive an email with the subject **Draw Approved**.