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BUILDING AUTOMATIONS WITH POWER AUTOMATE

PRESENTED BY
TYLER LONG

OVERVIEW

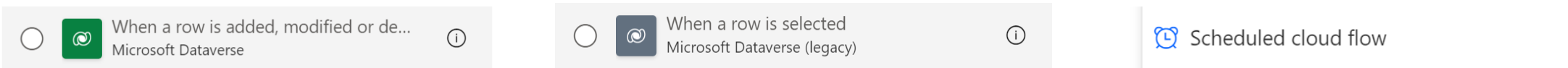
- Advantages of Power Automate over Process Workflows
- Word Templates and Useful Connectors
- Differences Trigger Types
- Expressions

ADVANTAGES OF POWER AUTOMATE OVER PROCESS WORKFLOWS

- PowerAutomate can fire on ANY action within your Microsoft tenant, including GOApply, SharePoint, etc.
- It can also incorporate connectors to any data source, such as Excel or 3rd party integrations like AdobeSign or DocuSign
 - Example: Move GOApply documents
- When would you want a Power Automate Workflow over a Process Workflow?
 - Trigger conditions could occur outside of CRM (GOapply, SharePoint, Outlook)
 - Actions are complex
 - Highest level of functionality is needed

POWER AUTOMATE – CREATING A NEW FLOW

- First decision when creating a new flow is choosing when it will fire:
 - Automatically (things being Added, Modified or Deleted)
 - Selecting Rows and Manually Firing
 - Scheduled Cadence



Scheduled:

- Note: If you are using the manual row trigger, it needs to be the (legacy) version of the Microsoft Dataverse connector
 - The Green Dataverse connector does not yet have row selecting as a trigger option

POWER AUTOMATE – GET A ROW VS LIST ROWS

- When collecting akoyaGO data, you can either use the Dynamics 365 “green” step called Get A Row By ID, or List Rows
- Get a Row by ID is used when you know exactly the row you are looking for based on information you already collected
 - Example: You are running a workflow on a specific request, so you “know” the exact Constituent Applicant based on the lookup field
- List Rows is reserved when you have a 1:M Relationship for something you are looking for, based on what you already have
 - Example: I have the Request, I want to list the Payments for that Request


POWER AUTOMATE – FILTERING LIST ROWS AND APPLY TO EACH

- List Rows generally needs to be filtered in the Filter Rows section, otherwise you will get rows not relating to your data
- As soon as you utilize a List Rows action, you will need to execute specific actions for those list rows inside an “apply to each” step, as you need to loop through each row in the set
- Many tools are available for converting filters to Power Automates Odata style, including XRM Toolbox and Chat GPT


POWER AUTOMATE – EXPRESSIONS

- Expressions are commonly used for converting your existing dynamics data into outputs suitable for new emails, word templates, or external facing communications
- Microsoft provides an in-line expression helper in the Dynamic Content Pane
 - Expression examples :


Today's Date

Dynamic content	Expression
	<code>utcNow()</code>

Format date to mm-DD-YYYY

Dynamic content	Expression
	<code>formatDateTime(exampledate, 'mm-DD-YYYY')</code>

Format Currency Value

Dynamic content	Expression
	<code>formatNumber(exampleamountvalue, 'en-US')</code>

POWER AUTOMATE – TESTING

- Once your flow is ready, you can test using your chosen trigger
- You can review the Run History on the main screen of the flow

28-day run history ⓘ [Edit columns](#) [All runs](#)

Start	Duration	Status
Jun 13, 10:14 AM (1 wk ago)	00:00:01	Succeeded
May 31, 03:33 PM (3 wk ago)	00:00:02	Succeeded
May 31, 01:22 PM (3 wk ago)	00:00:01	Succeeded
May 31, 12:33 PM (3 wk ago)	00:00:01	Succeeded
May 31, 12:32 PM (3 wk ago)	00:00:01	Succeeded

Test Flow ✕

☐ Manually
This flow cannot be triggered for testing.

☒ Automatically

☒ With a recently used trigger.

☐ Succeeded 1 week ...

☐ Succeeded 3 weeks ...

☐ Succeeded 3 weeks ...

☐ Succeeded 3 weeks ...

☐ Succeeded 3 weeks ...

- From the edit screen, there is a test button that you can retry any successful or unsuccessful run over again

Q&A / Live Building

THANK YOU

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Manager of Technical Services



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