Rock Your World with Power Automate

live.dynamicscon.com

Introduction

Herb

- Blue Summit Technologies
- Power Automate Geek
- CRM 4.0
- USMC Programmer
- Minnesoooooota
- 5 Marathons, Many halves
- Vintage Mopar Fan
- Lego Fan

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Chad

- Stoneridge Software
- Power Platform
- Mechanical Engineer
- Houston, Texas
- End User/Operations Background
- Parent of 4-year-old

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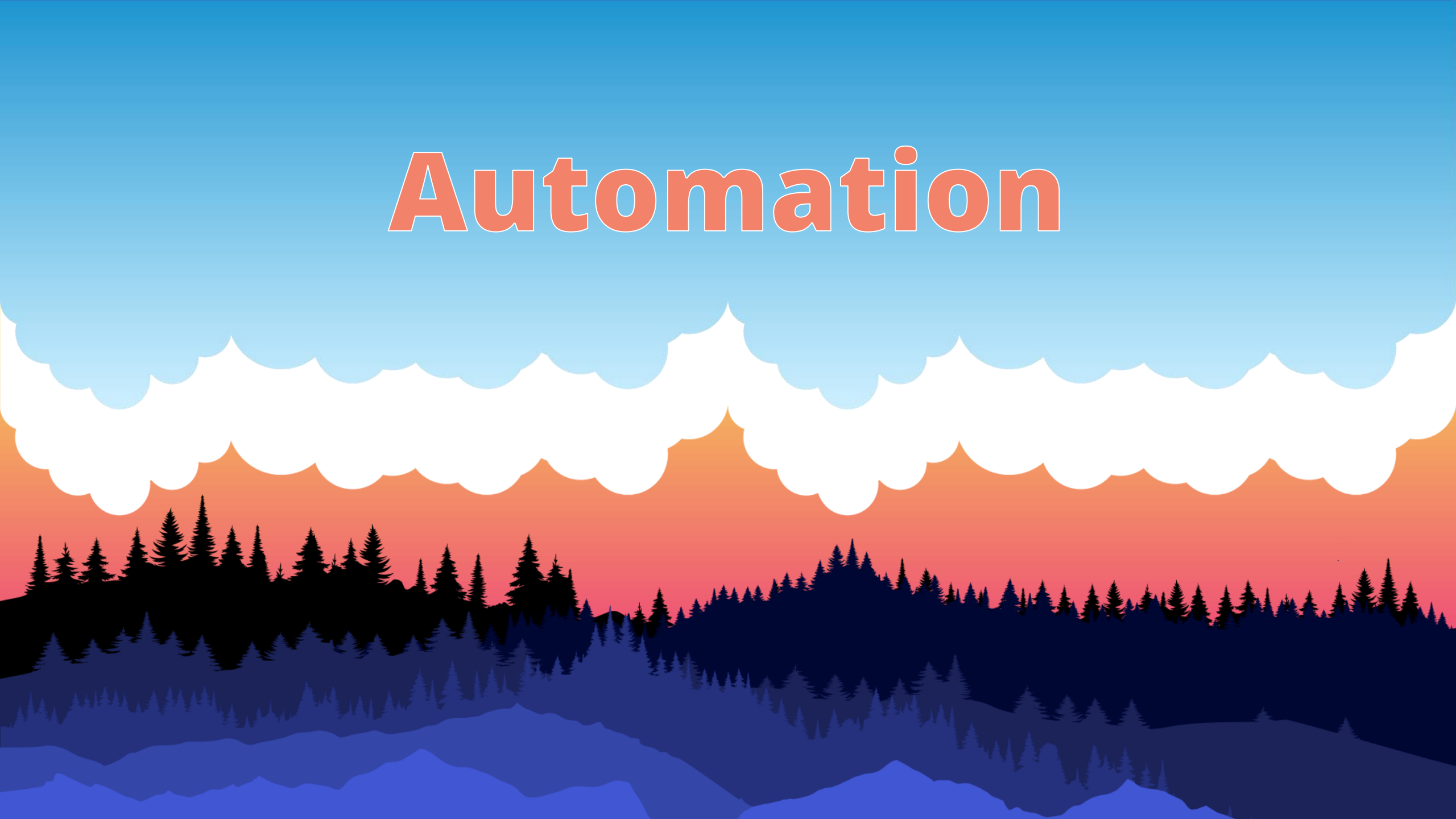
Agenda

Rock your world with Power Automate

See how Power Automate cloud and desktop flows can make your workday more efficient. From eliminating repetitive tasks to reducing errors, you'll find many ideas to bring you more joy in your workday! This session is intended for anyone who is a User of Dynamics 365.

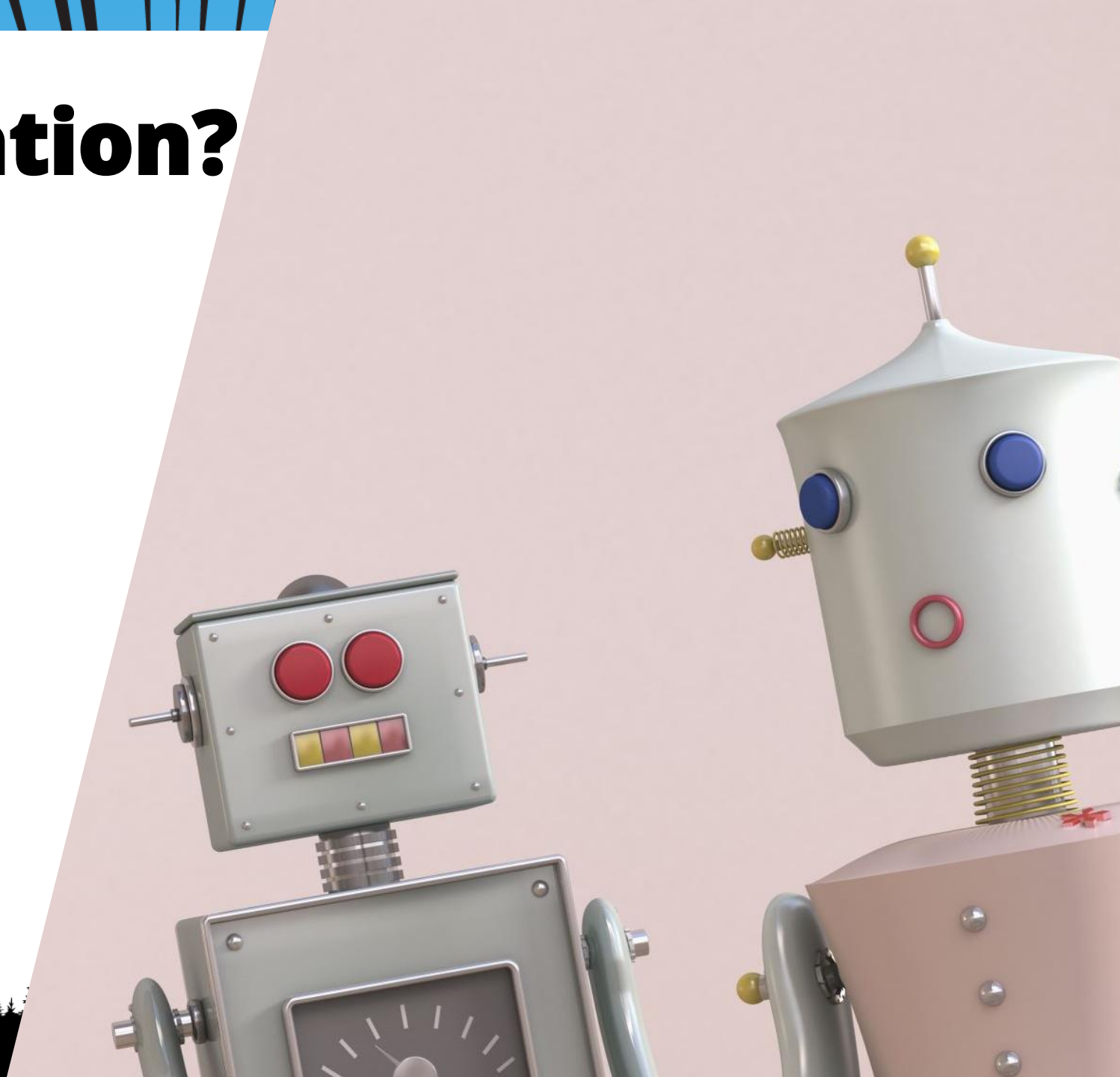
- Introduction
- Let's hear from you!
- My Flows, Cloud Flows, Desktop Flows
- Demos + Examples
- Blurb on licensing*
- Resources

Automation



What is Automation?

- “The technique, method, or system of operating or controlling a process by highly automatic means… reducing human intervention to a minimum.” (Dictionary.com)



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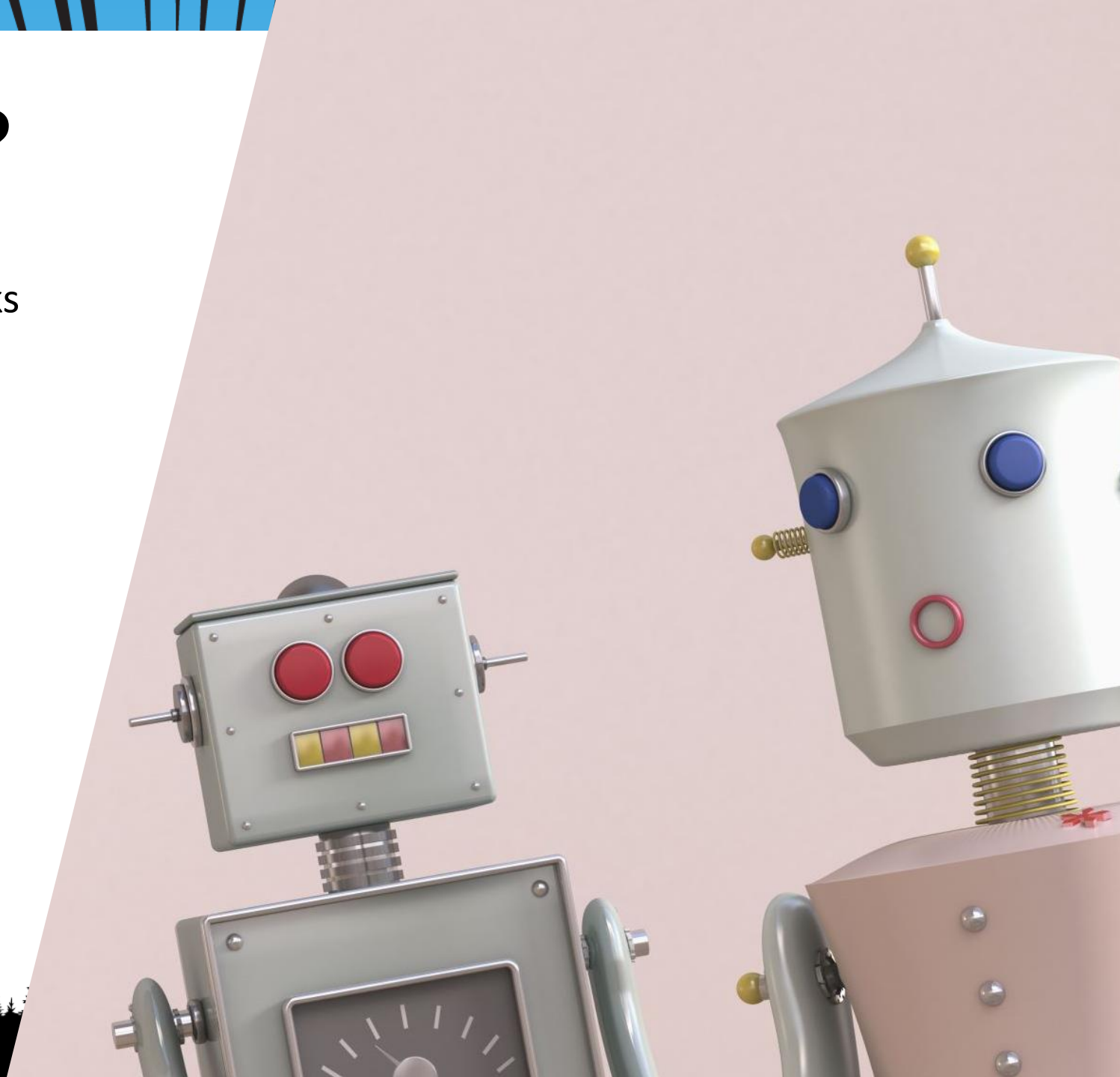
Why Automate?

- Eliminate mundane/repetitive tasks
- Make life easier for yourself
- Increase user adoption
- Reduce stress and errors
- Standardize processes
- Enforce business logic
- Improve data quality
- Access external data sources
- Improve communication
- Free you up to enjoy your day!



Let's hear from you!

💡 Where might automation help you in your day?
💡 How have you automated something for yourself in the past?

- Scan the QR code to submit your idea.
- Something that will reduce redundancy in your day, week, or month.
- We will discuss responses together and might choose one to walk through the automation.

Where We've Come From

- Historically clunky and highly dependent on developers
- Out of reach of the common folk
- Microsoft working to democratize this sort of thing

Microsoft Power Platform

The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.

Power BI
Business analytics

Power Apps
App development

Power Automate
Process automation

Power Virtual Agents
Intelligent virtual agents

Power Pages
External-facing websites

Data connectors

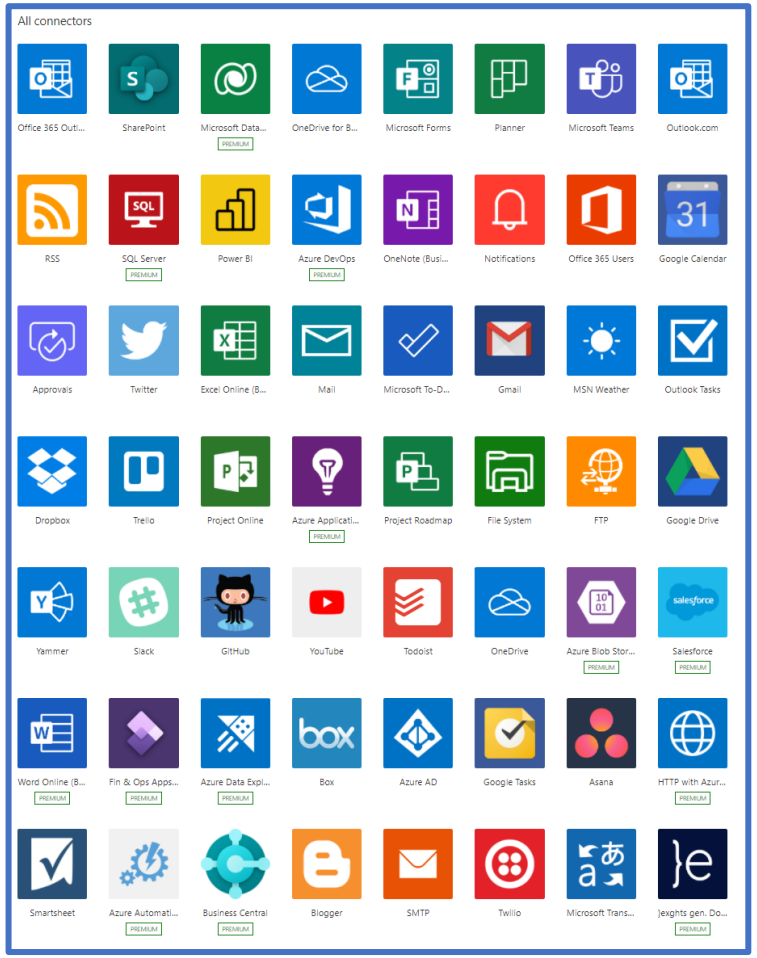
AI Builder

Dataverse

Power Automate

- Microsoft's low-code automation tool
- Cloud flows = automation through API connections
- Leverages data connectors for easy access
- Uses:
  - On-demand flows
  - Automated flows
  - Scheduled flows
- Power Automate Desktop
  - Make D365 talk with desktop applications, local file storage, or web applications

Data Connectors



- Pre-built API connections
- Enables you to connect to hundreds of other data sources
  - First party and independent
  - Salesforce, SAP, SQL Server, Excel, WordPress…
- Build your own custom connectors

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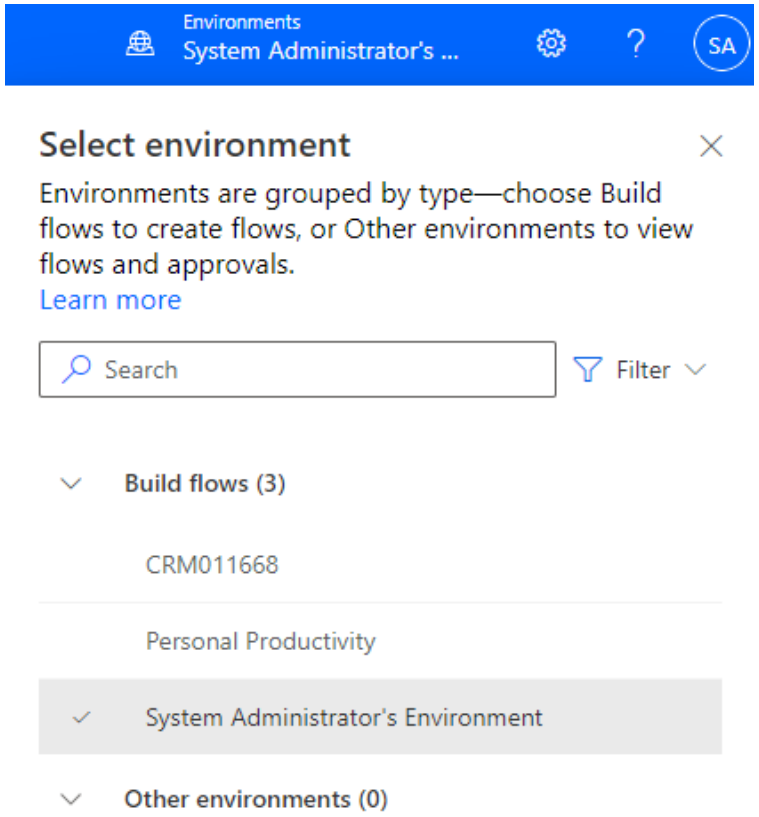
Connector Review by @crmheidi https://www.connectorreview.com/ beta.

Filter by tag:

- Budget
- Business Central
- Business Forecast
- Business Process Managem...
- Business Strategy
- Calendar Scheduling
- Call Management
- Certification
- Charitable Contributions
- Chart Generator
- Chat
- Chatbots
- ChatGPT
- Chuck Norris
- Click Tracking
- Climate Change

Power Platform Environments

- Default = "Personal Productivity"
- Dataverse (Dynamics 365)
- Teams environments
- Developer environment



- Flows are built within an environment
- Select environment before building
- Align to the flow's purpose/data

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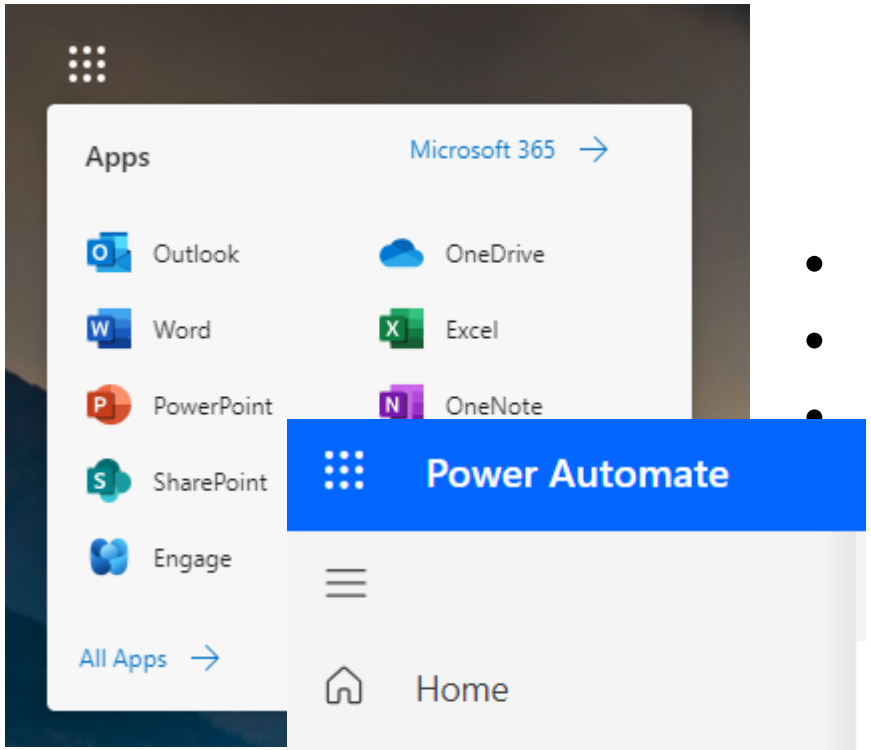
My Flows

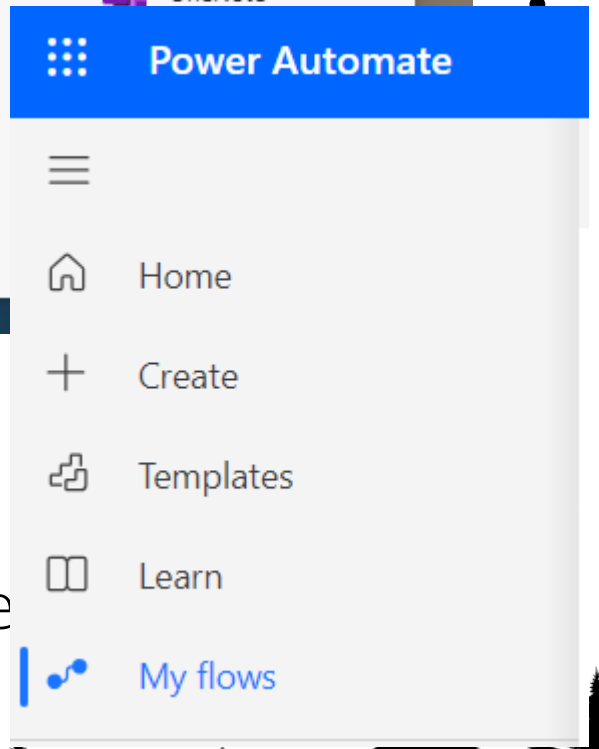
Dos

- Personal functionality only
- Practice and learning flows
- Start with a template
- Naming convention
- Use notes
- Error Handling

Don'ts

- Incorporate Organizational processe





- Requires sharing
- Not solution aware
- Environment specific
  - Know your data
  - Know your access

User leaves, flow stops running

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Solution Flows

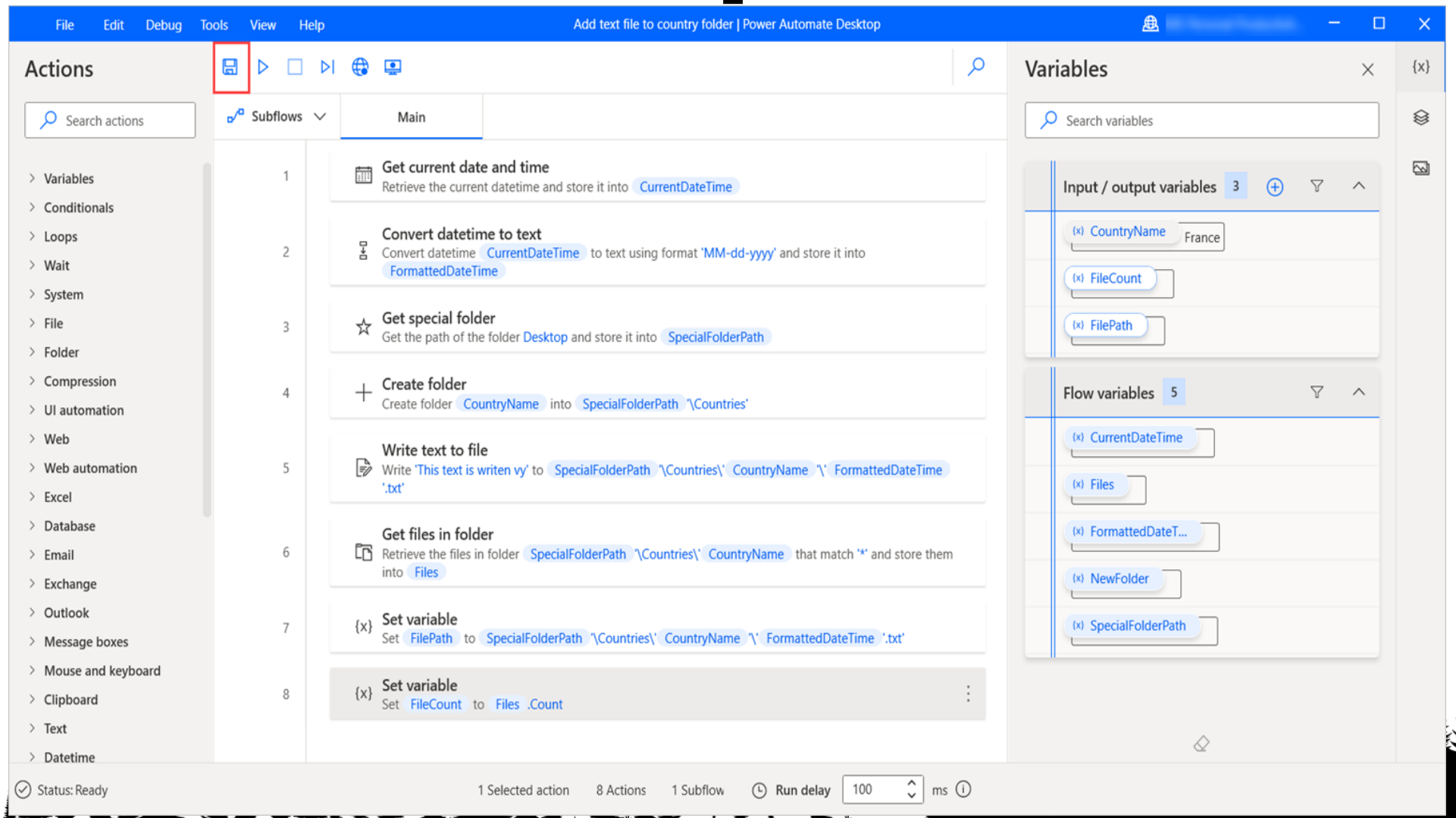
Dos

- Built in a solution
- Connection references
- Part of the application life cycle
- Organizational processes
- Keep in mind the environment and Specific records.
- Use Environment Variables and configuration tables
- Expressions is your friend
- Consider including the flow's name on the creation and update of records

Don'ts

- Begin with My Flows

Desktop Flows



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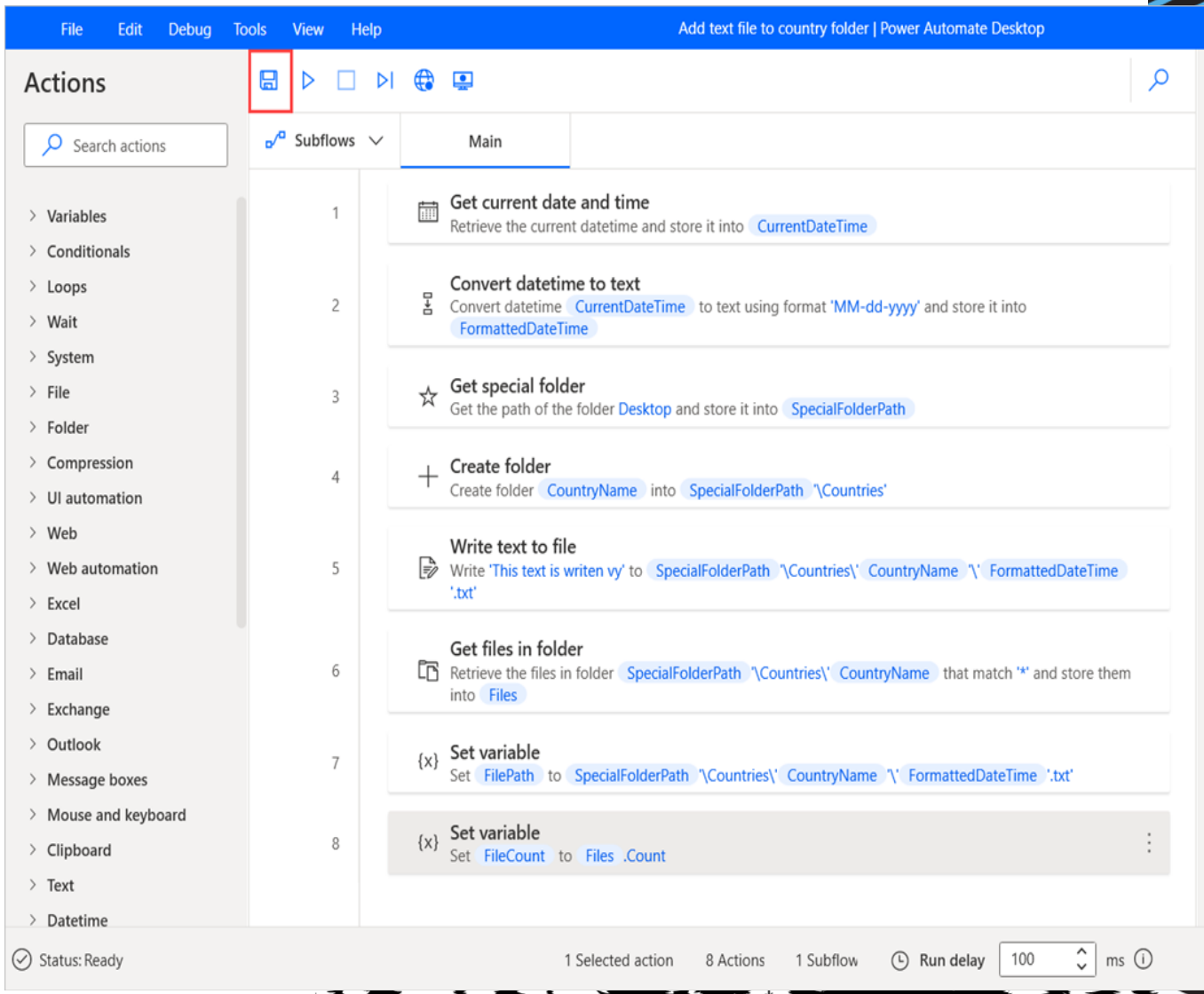
Desktop Flows

- "Robotic process automation"
- Repeat clicks of your mouse – kind of like macros
- Built into Windows 11
- Can access desktop applications and also scrape websites
- Runs real-time on your computer – or someone else's
- Be diligent in design



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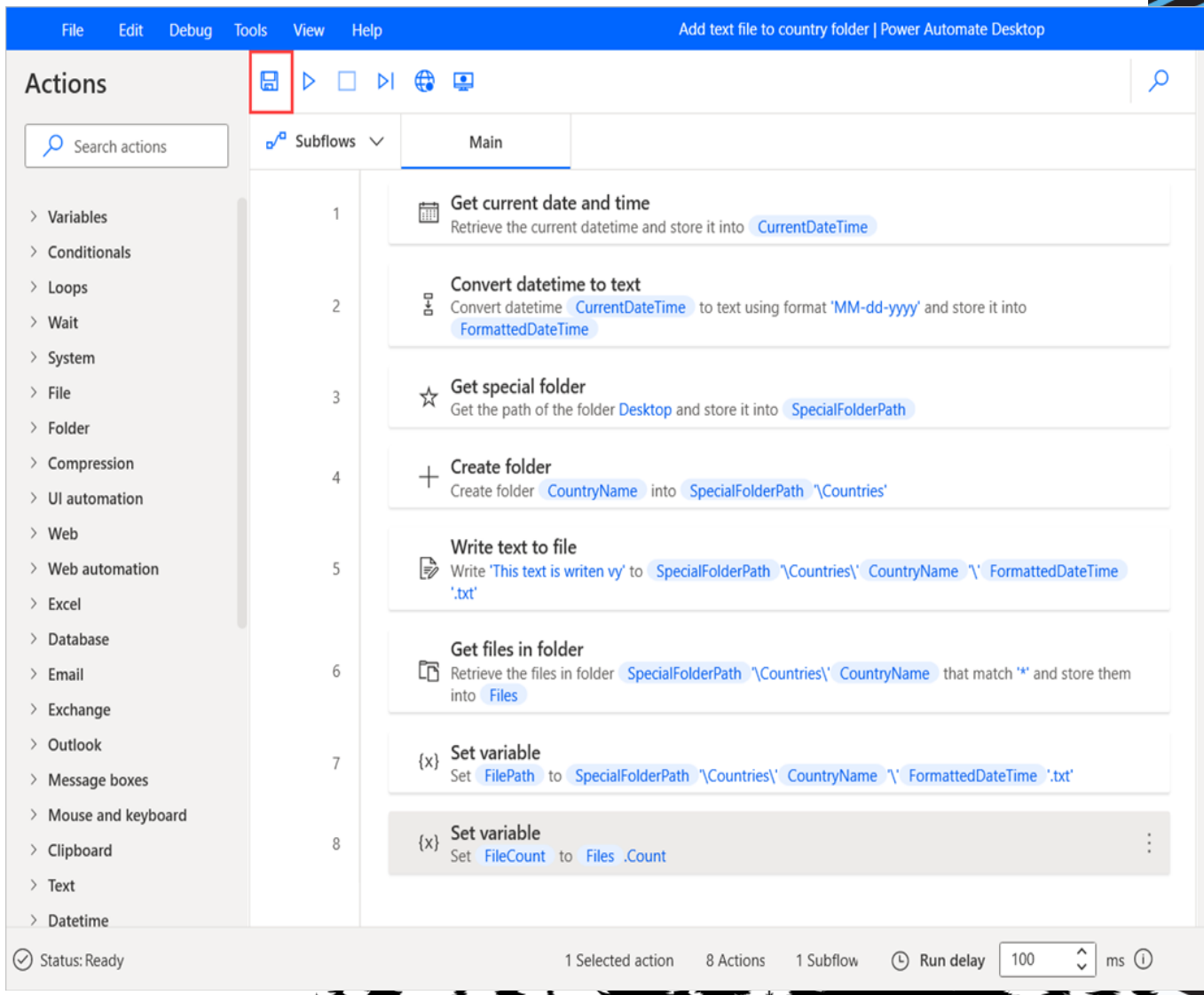
Desktop Flows

Versus Cloud Flows?

- Fundamentally different than cloud flows
- Access apps without APIs
- Can scrape the web to repeat what a user might do
- Definitions also stored in the cloud
- Can integrate with cloud flows



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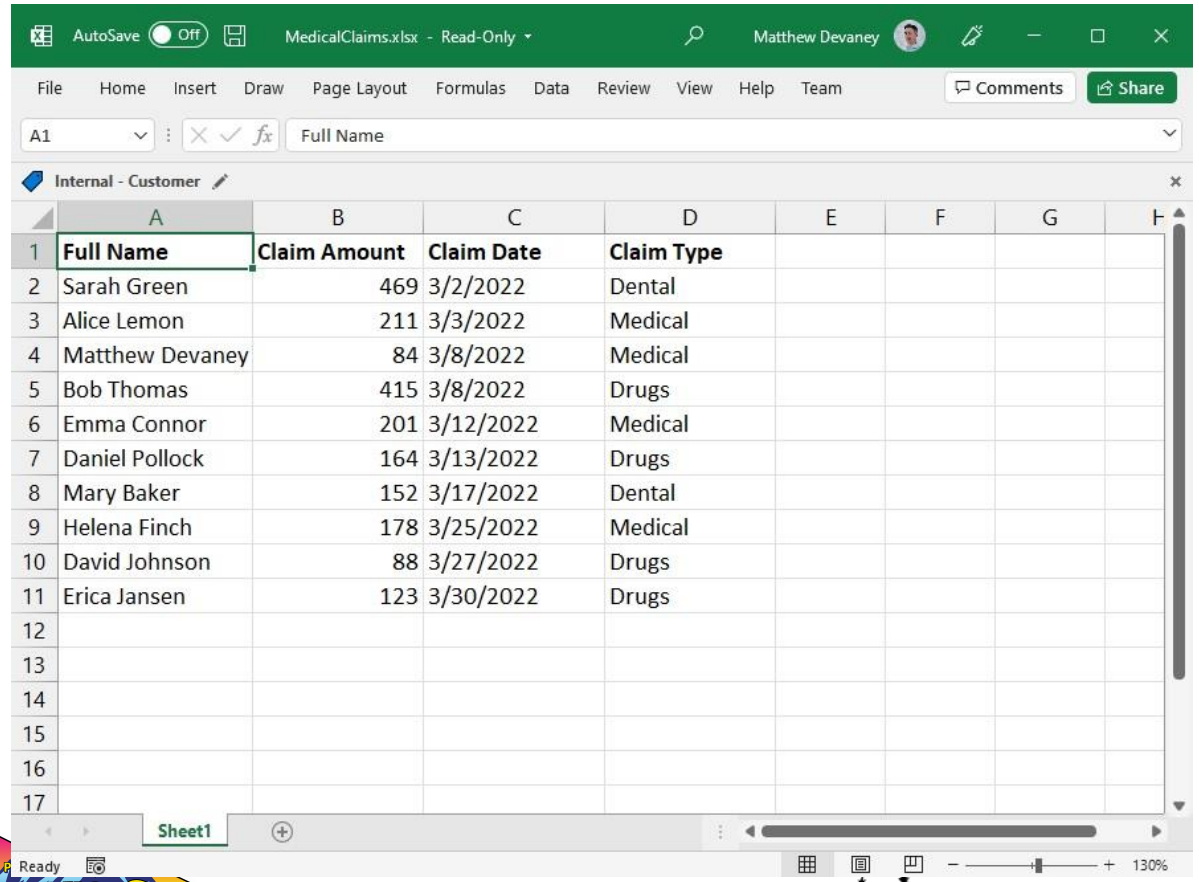
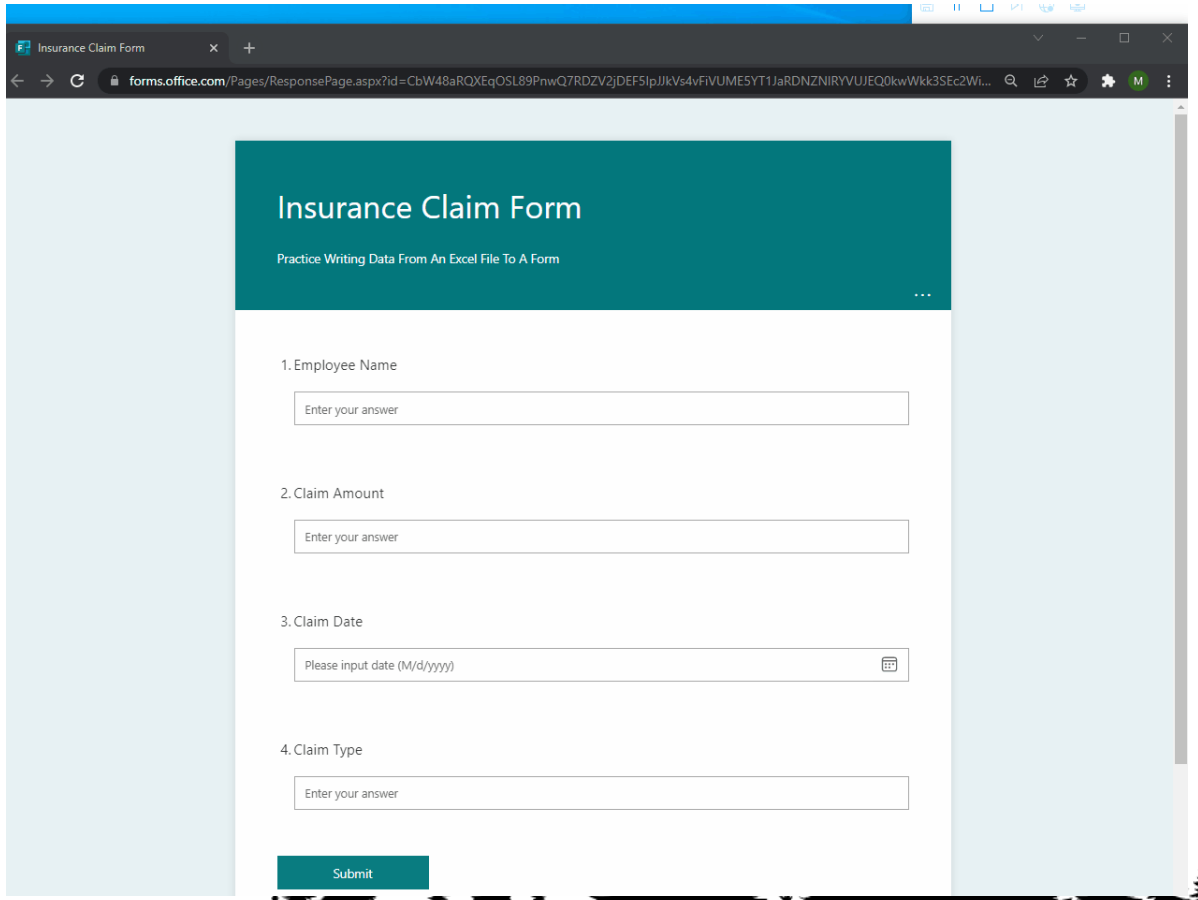
Fill Forms from Excel

*** All credit to Matthew Devaney**

[Power Automate Desktop: Data Entry From Excel To Website (matthewdevaney.com)]



	A	B	C	D
1	Full Name	Claim Amount	Claim Date	Claim Type
2	Sarah Green	469	3/2/2022	Dental
3	Alice Lemon	211	3/3/2022	Medical
4	Matthew Devaney	84	3/8/2022	Medical
5	Bob Thomas	415	3/8/2022	Drugs
6	Emma Connor	201	3/12/2022	Medical
7	Daniel Pollock	164	3/13/2022	Drugs
8	Mary Baker	152	3/17/2022	Dental
9	Helena Finch	178	3/25/2022	Medical
10	David Johnson	88	3/27/2022	Drugs
11	Erica Jansen	123	3/30/2022	Drugs
12				
13				
14				
15				
16				
17				



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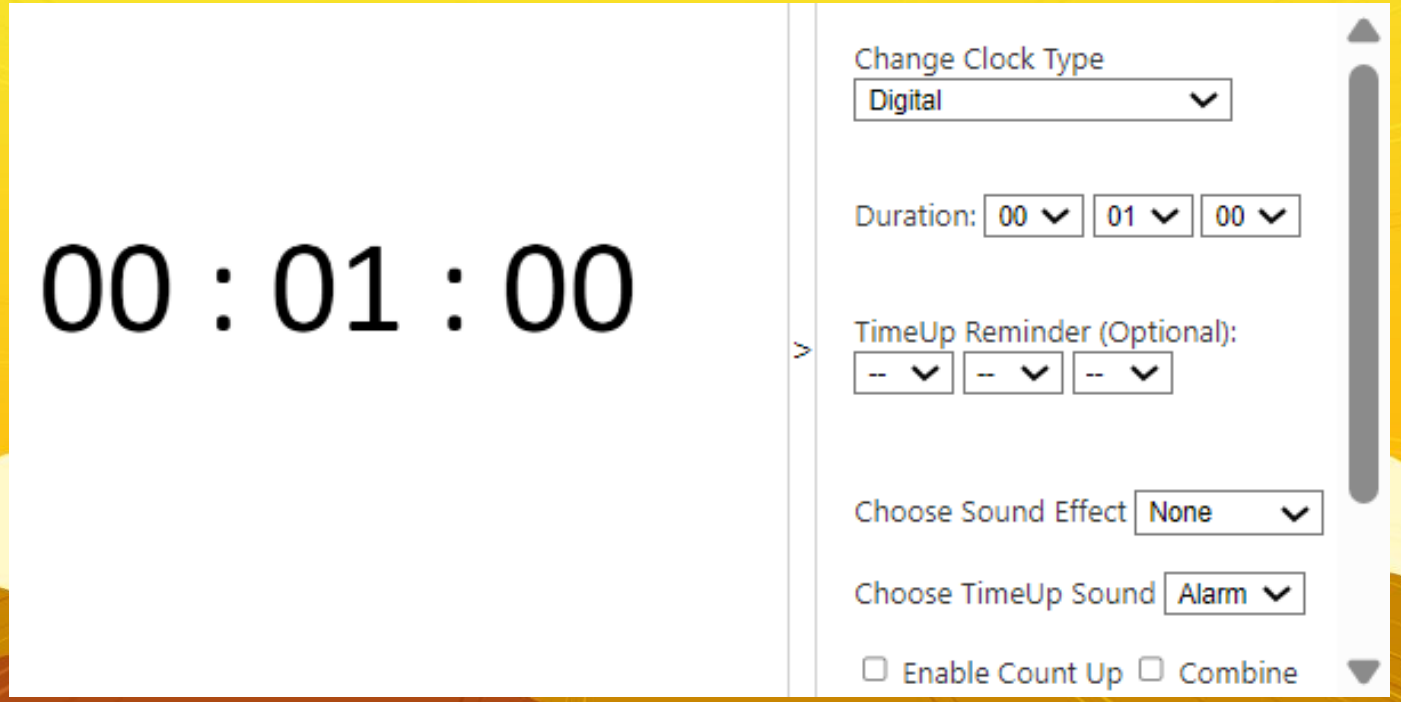
7th Slide Stretch



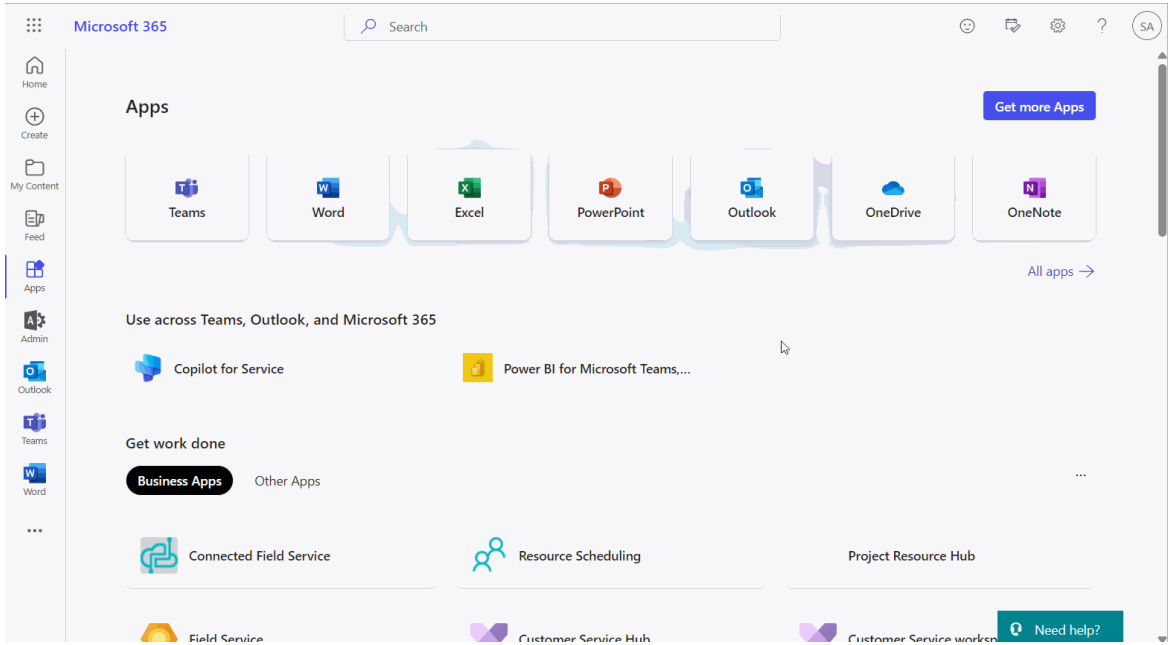
Getting Started

How can I get started?

- Copilot!
  - Describe it to design it.
- Templates
  - make.powerautomate.com
  - Teams
  - SharePoint
- Power Automate Desktop templates
- Import a flow from someone else.

This Photo CC BY-SA

Copilot – Describe it to design it!



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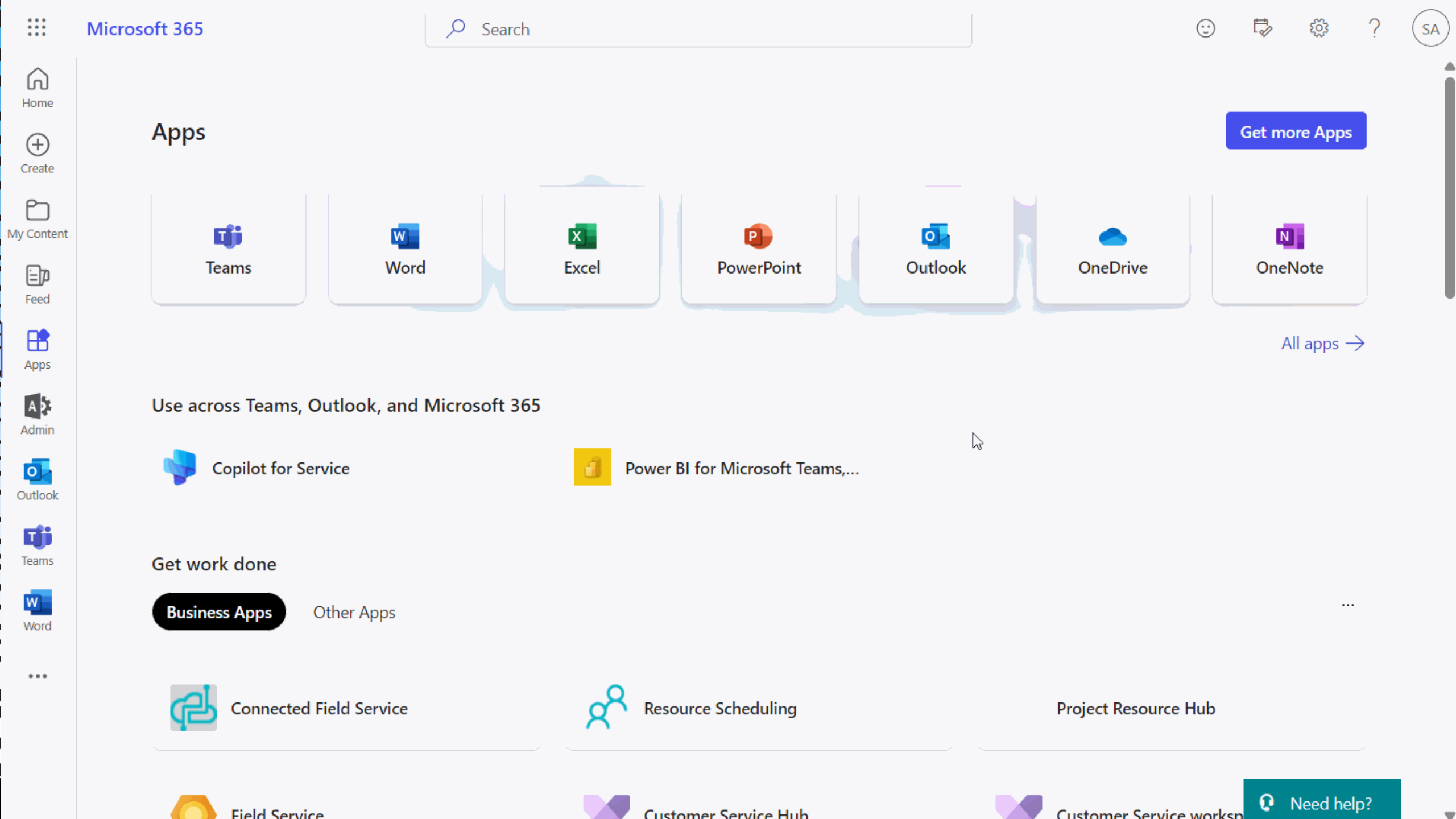
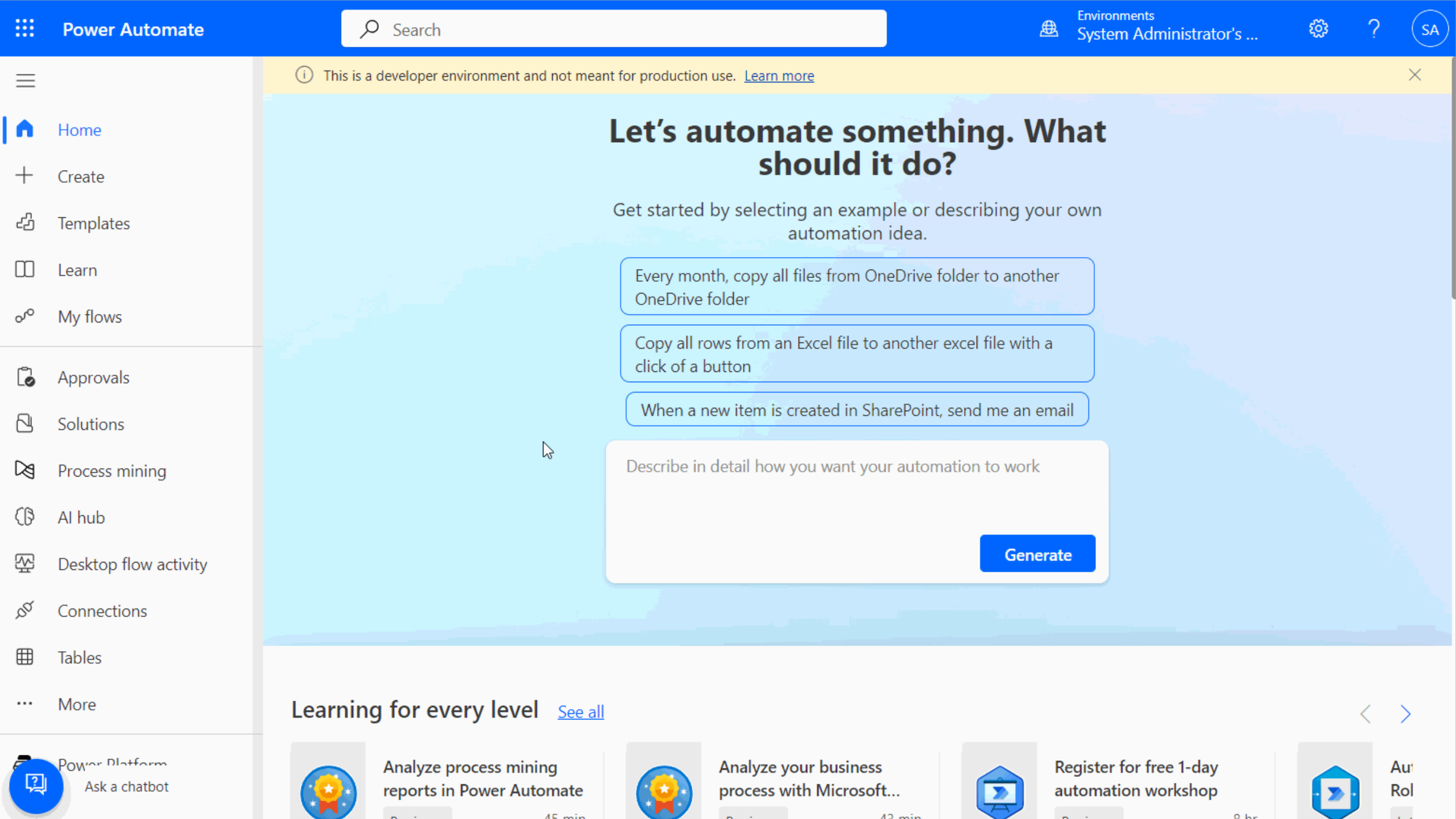

Microsoft 365
Search
SA
Home
Create
My Content
Feed
Apps
Admin
Outlook
Teams
Word
Apps
Get more Apps
Teams
Word
Excel
PowerPoint
Outlook
OneDrive
OneNote
All apps
Use across Teams, Outlook, and Microsoft 365
Copilot for Service
Power BI for Microsoft Teams,...
Get work done
Business Apps
Other Apps
Connected Field Service
Resource Scheduling
Project Resource Hub
Need help?

Templates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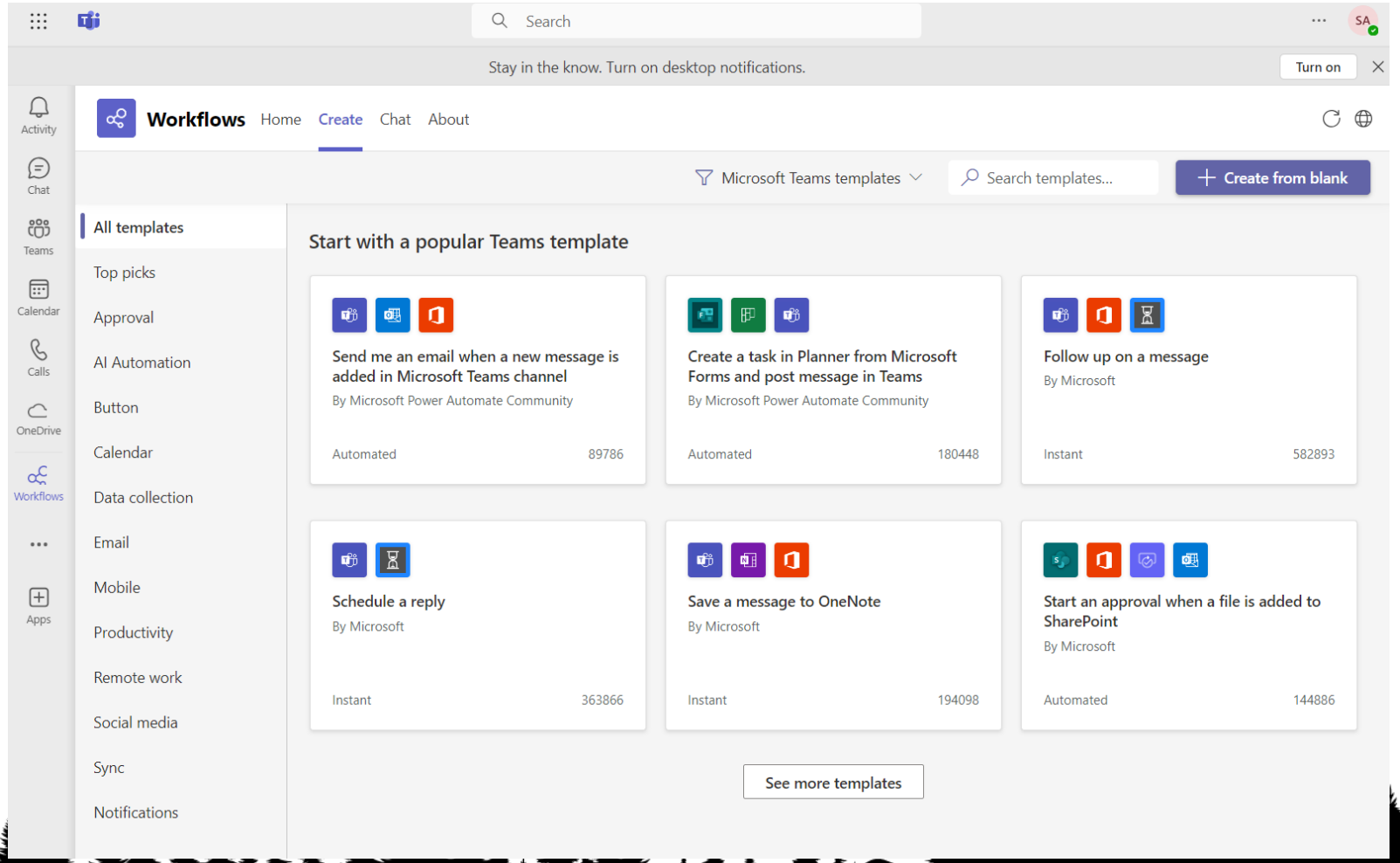
Environments
System Administrator's ...
SA
This is a developer environment and not meant for production use. Learn more
Home
Create
Templates
Learn
My flows
Approvals
Solutions
Process mining
AI hub
Desktop flow activity
Connections
Tables
More
Power Platform
Ask a chatbot
Let's automate something. What should it do?
Get started by selecting an example or describing your own automation idea.
Every month, copy all files from OneDrive folder to another OneDrive folder
Copy all rows from an Excel file to another excel file with a click of a button
When a new item is created in SharePoint, send me an email
Describe in detail how you want your automation to work
Generate
Learning for every level
See all
Analyze process mining reports in Power Automate
Analyze your business process with Microsoft...
Register for free 1-day automation workshop

Teams Templates
"Workflows"



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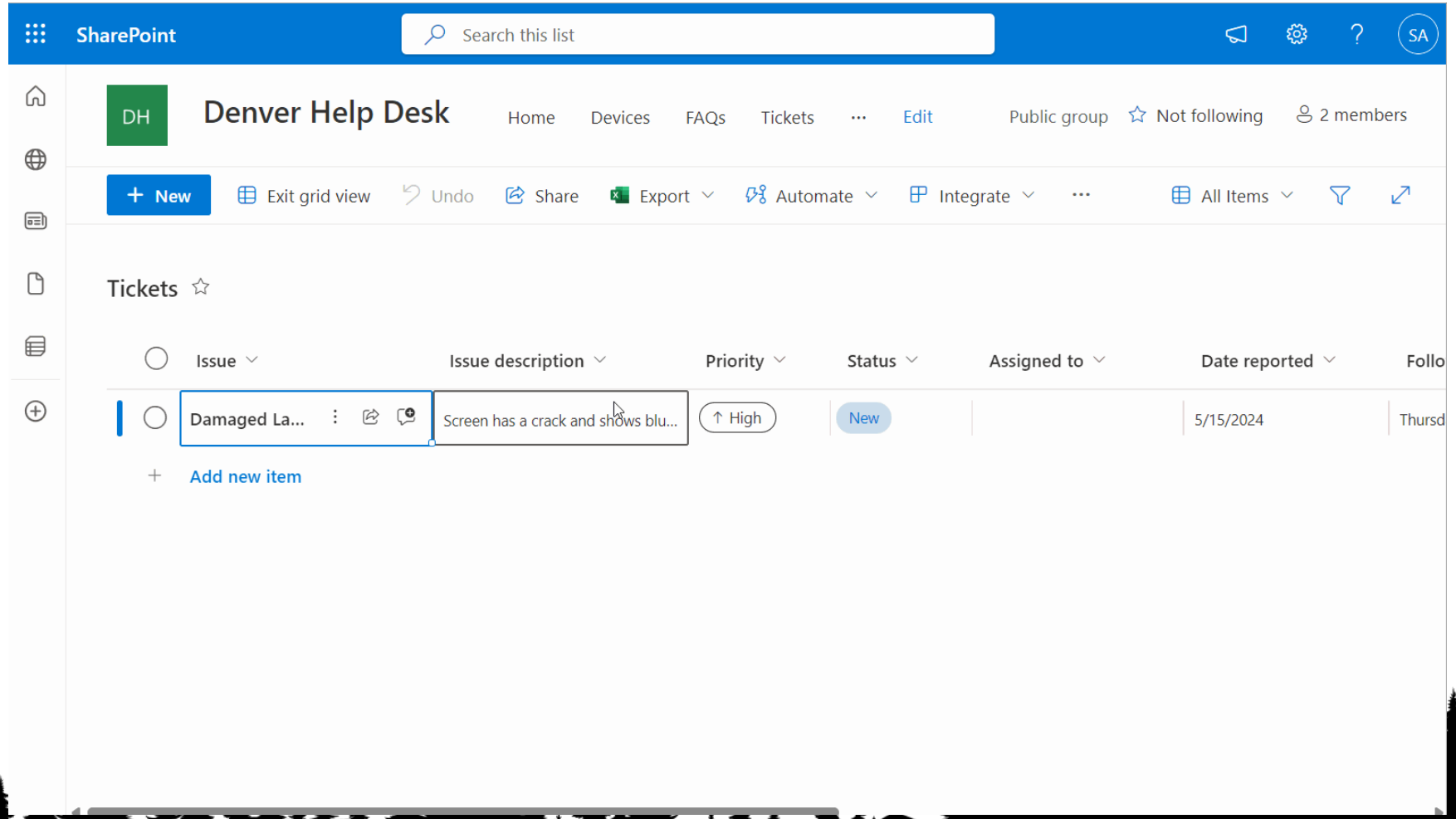
SharePoint Flows



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SharePoint

Search this list

DH

Denver Help Desk

Home Devices FAQs Tickets ... Edit

Public group Not following 2 members

+ New | Exit grid view | Undo | Share | Export | Automate | Integrate | ... | All Items

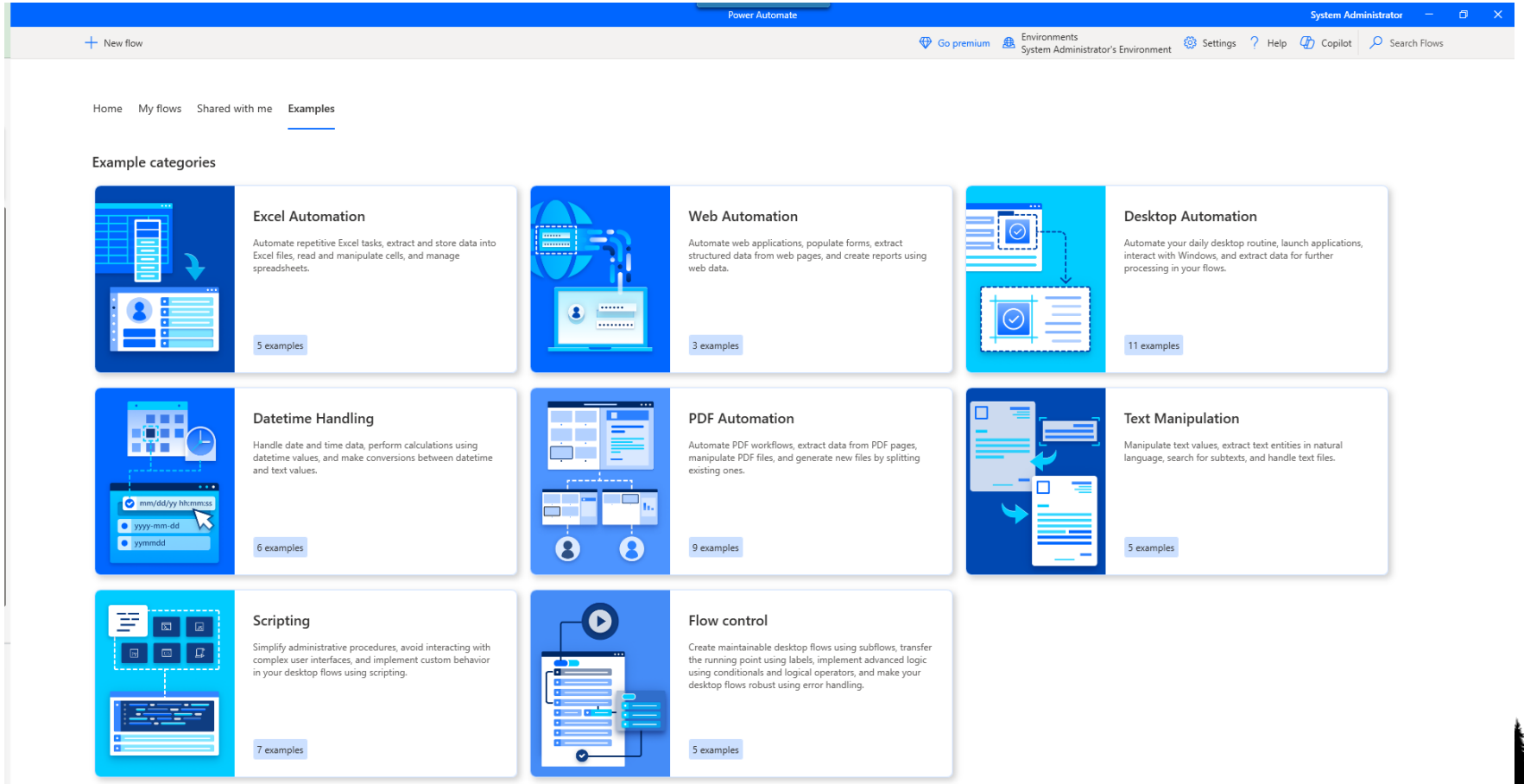
Tickets

Issue	Issue description	Priority	Status	Assigned to	Date reported	Fo
Damaged La...	Screen has a crack and shows blu...	↑ High	New		5/15/2024	Thu

+ Add new item

Desktop Flow Templates

Go talk Andrew + Kylie Kiser at 10:30 to learn more!



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PDF Automation

Name

Create PDF from selected PDF page(s)

Get images from PDF

Merge two PDFs

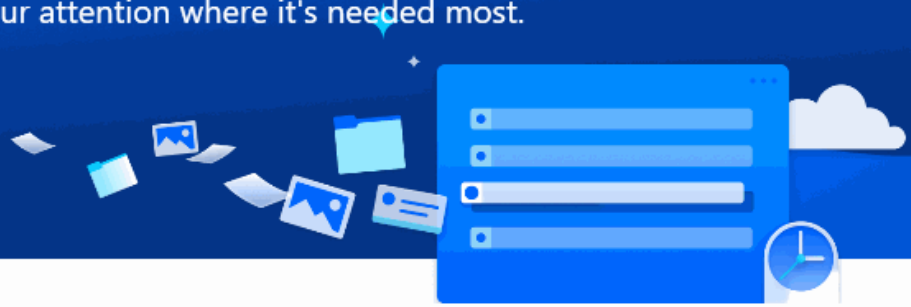
Extract table(s) from PDF

Get number of pages in a PDF

Welcome to Power Automate, System Administrator

With Power Automate, you can automate all mundane tasks and focus your attention where it's needed most.
Learn how to build automations that will free up your valuable time.

Watch a 1 minute video



Begin your automation journey

Get familiar with Power Automate and begin your automation journey.

Get started tour

Get a tour on Power Automate for desktop and access all features available to elevate your ex...

Start tour

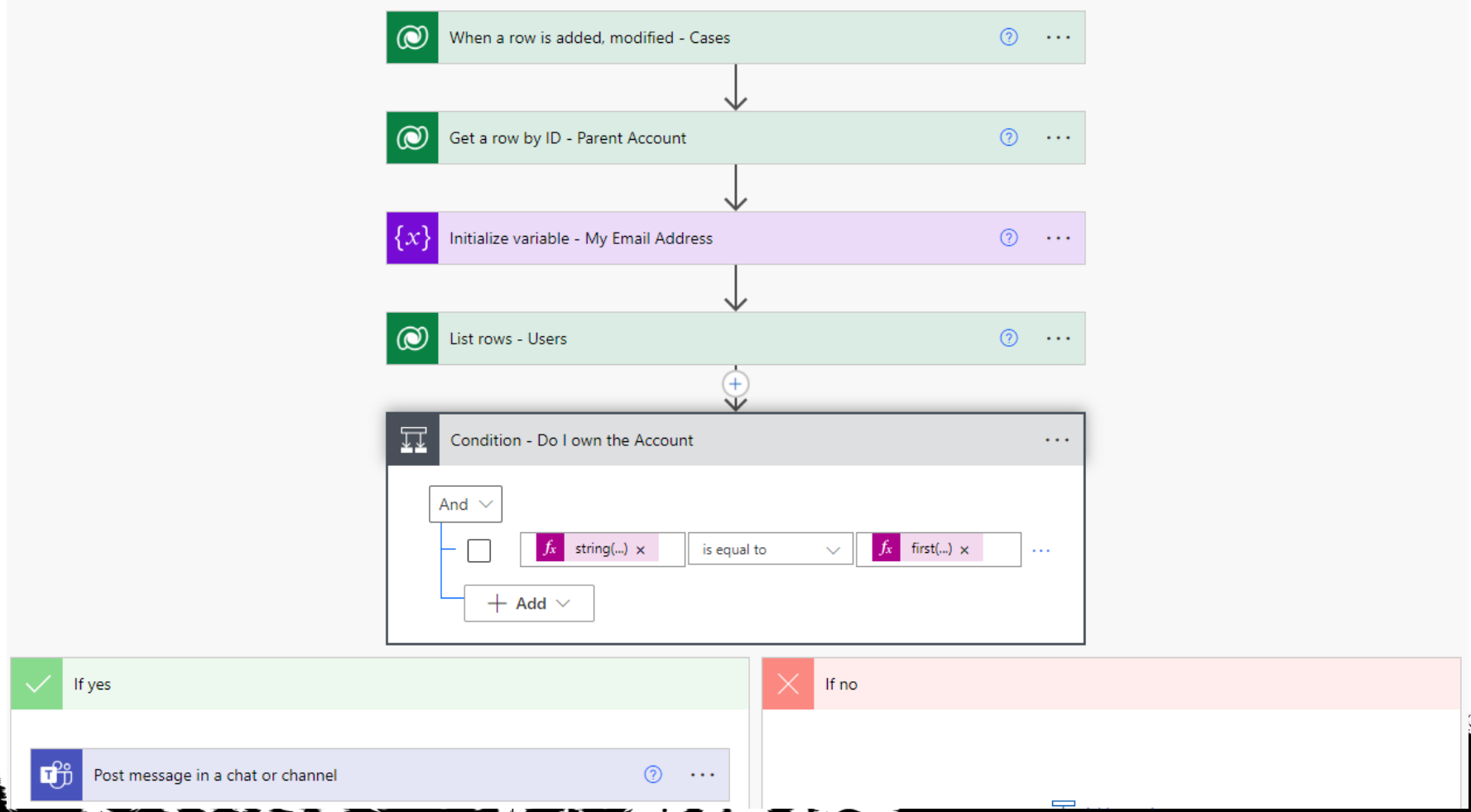
Build desktop flows

Drag and drop actions to perform the steps of your automation and form a flow.

New flow

Cloud Flows in Action!

Case – When my accounts get a case



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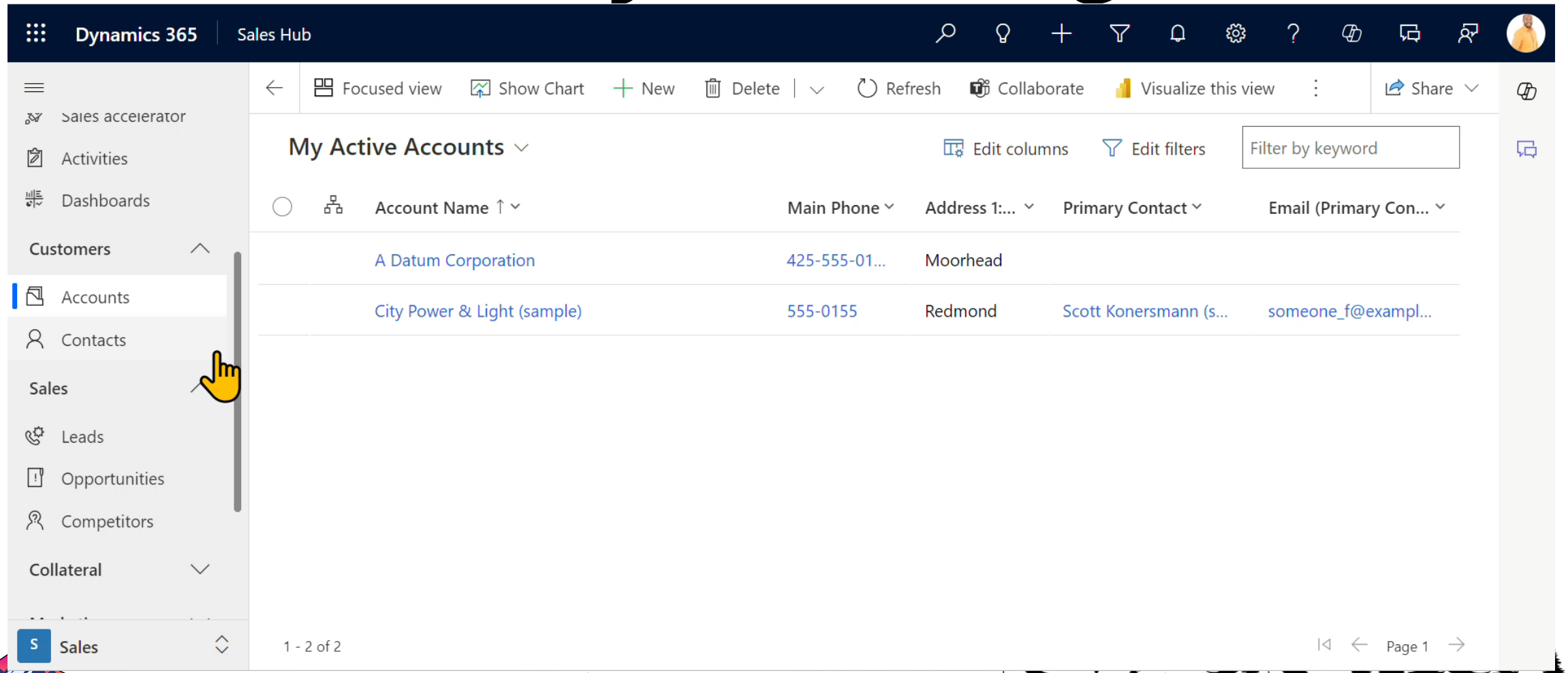

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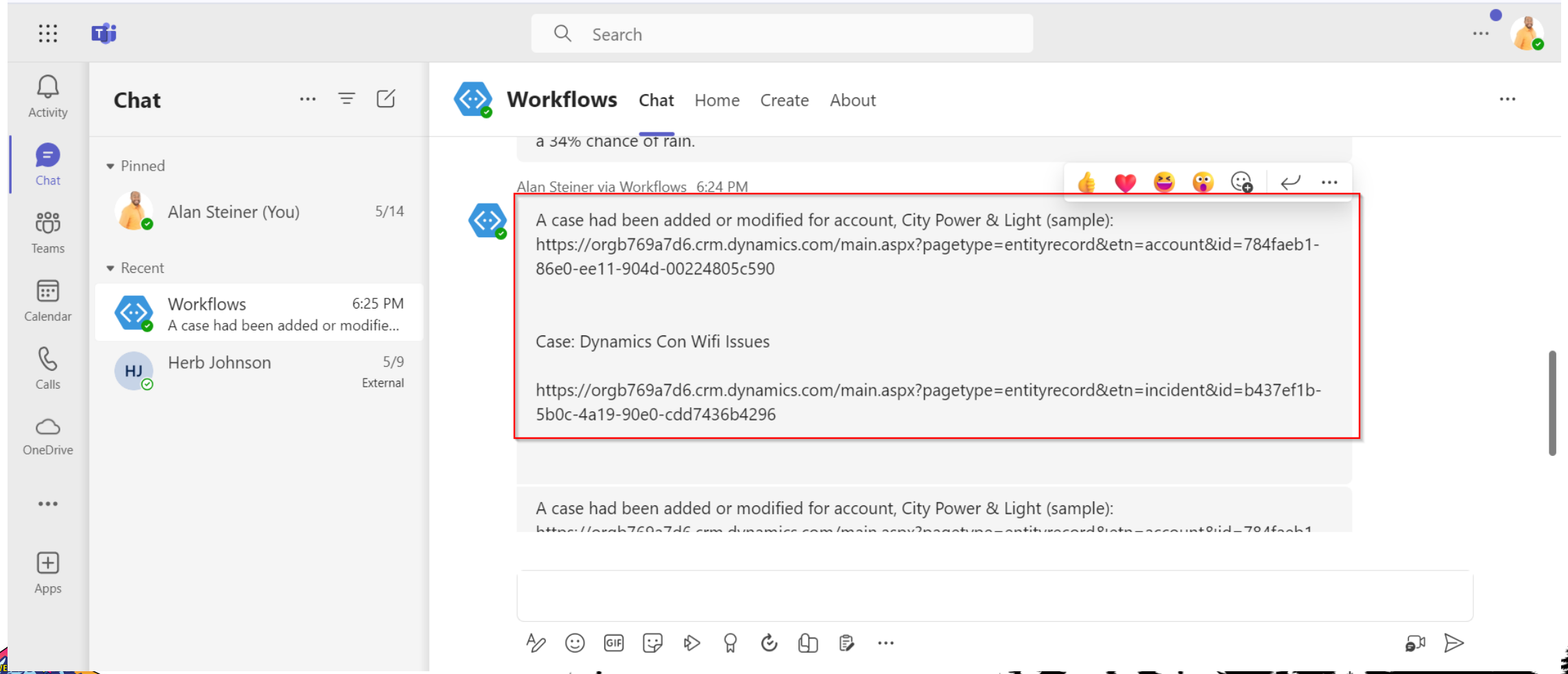

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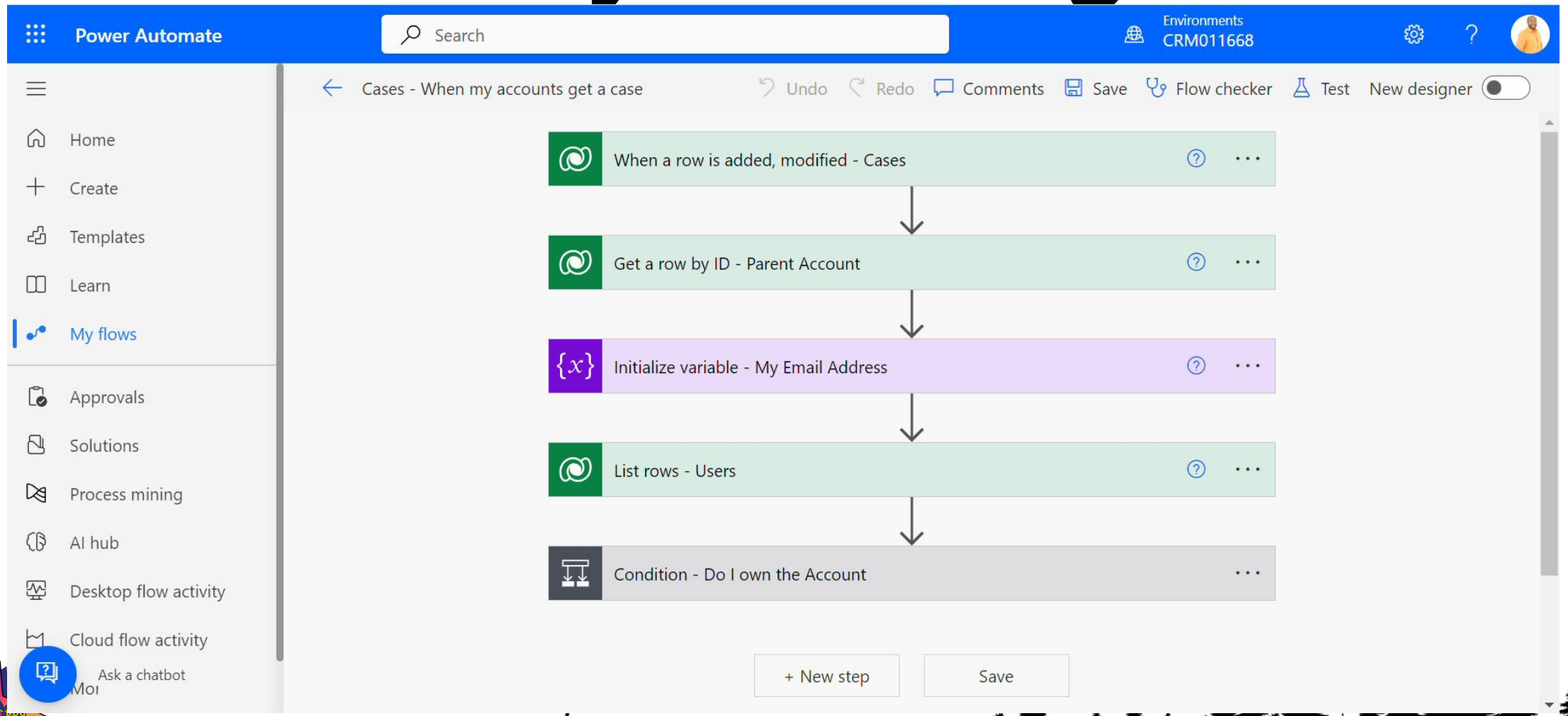

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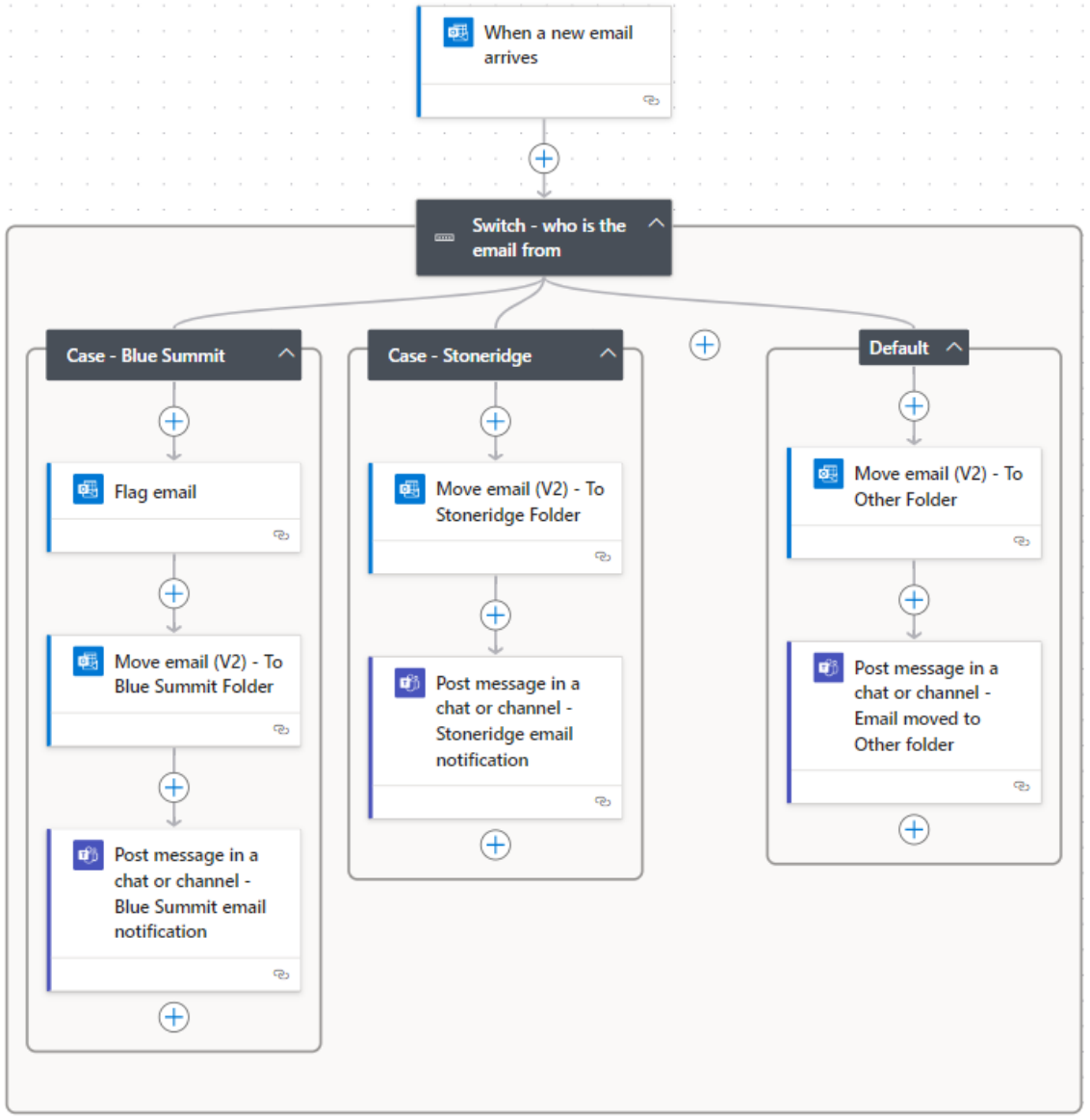
When I get an email – process it



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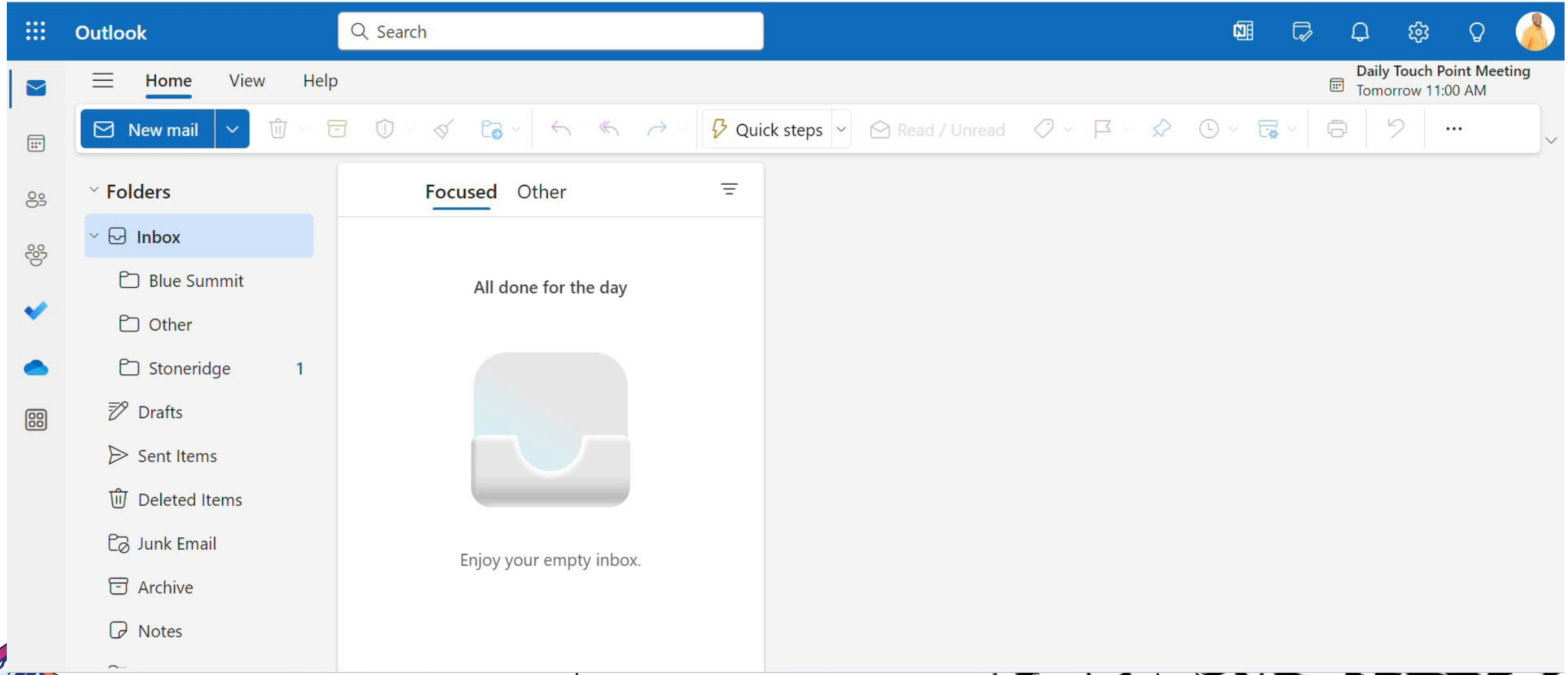

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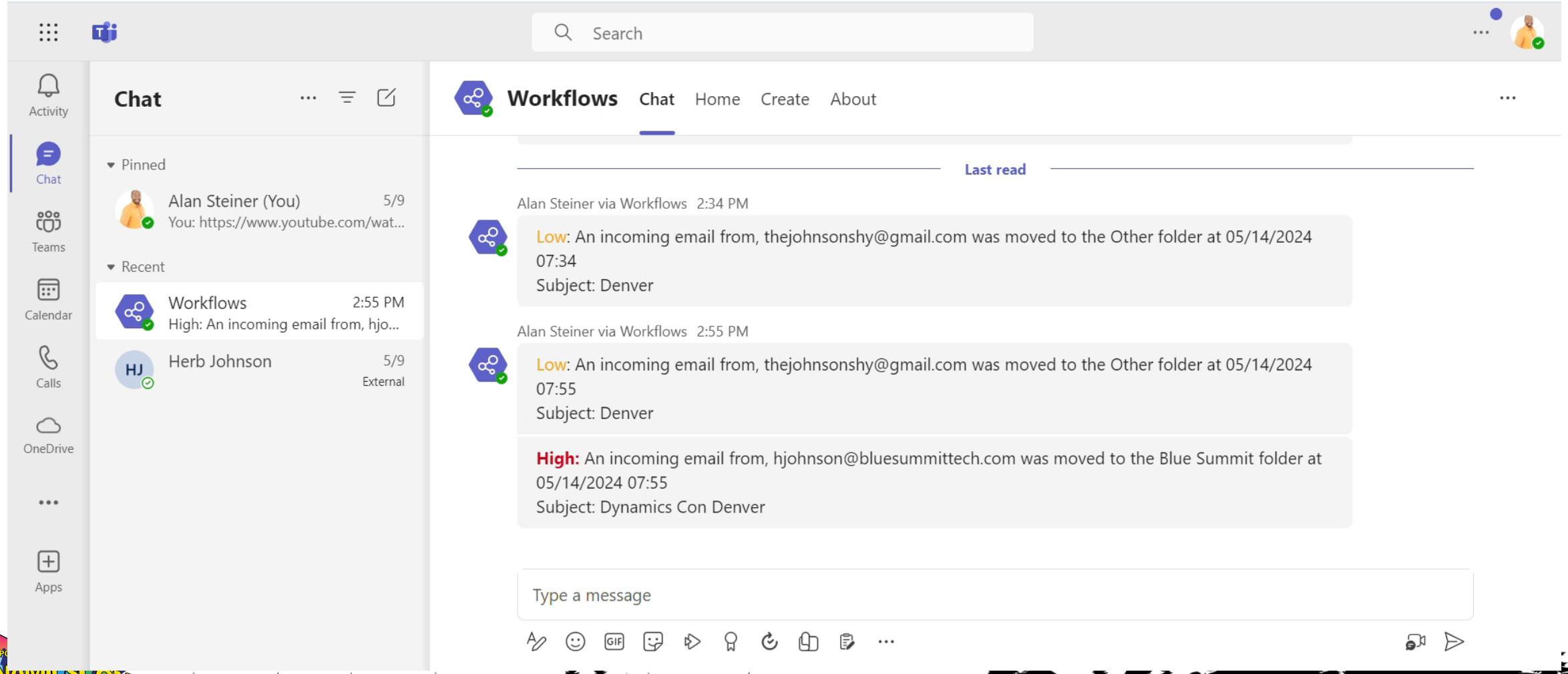

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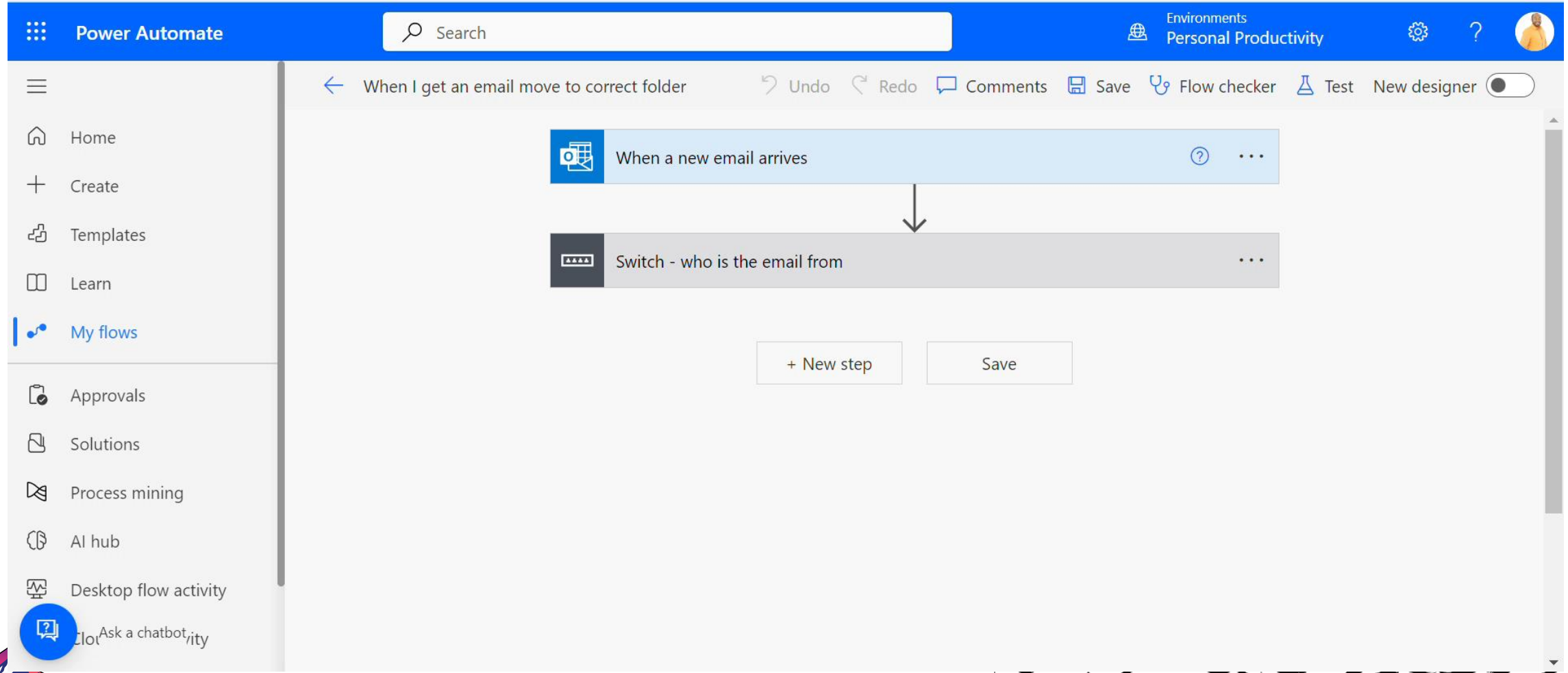

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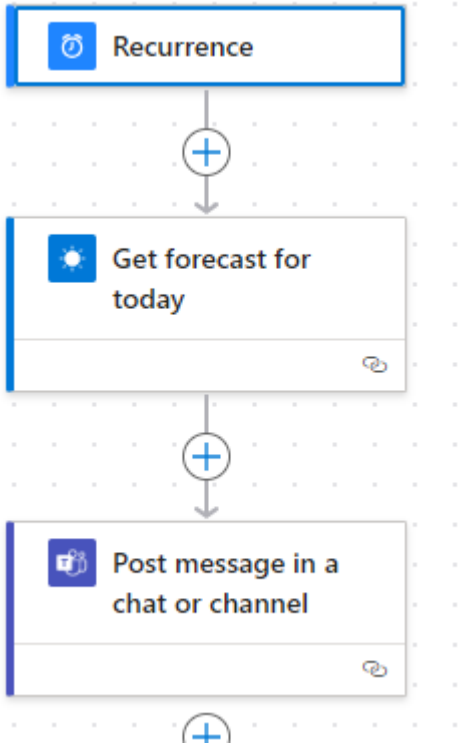
Post daily weather



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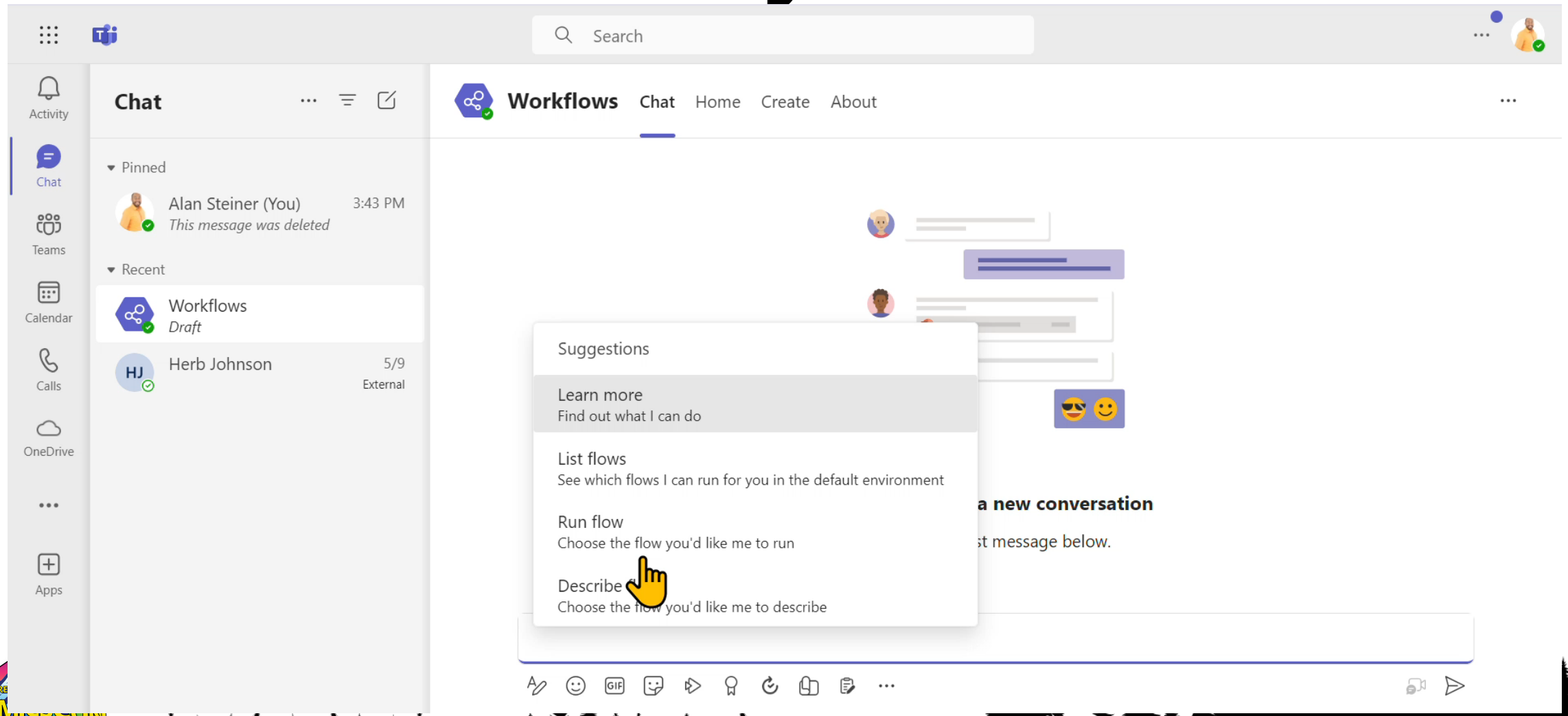
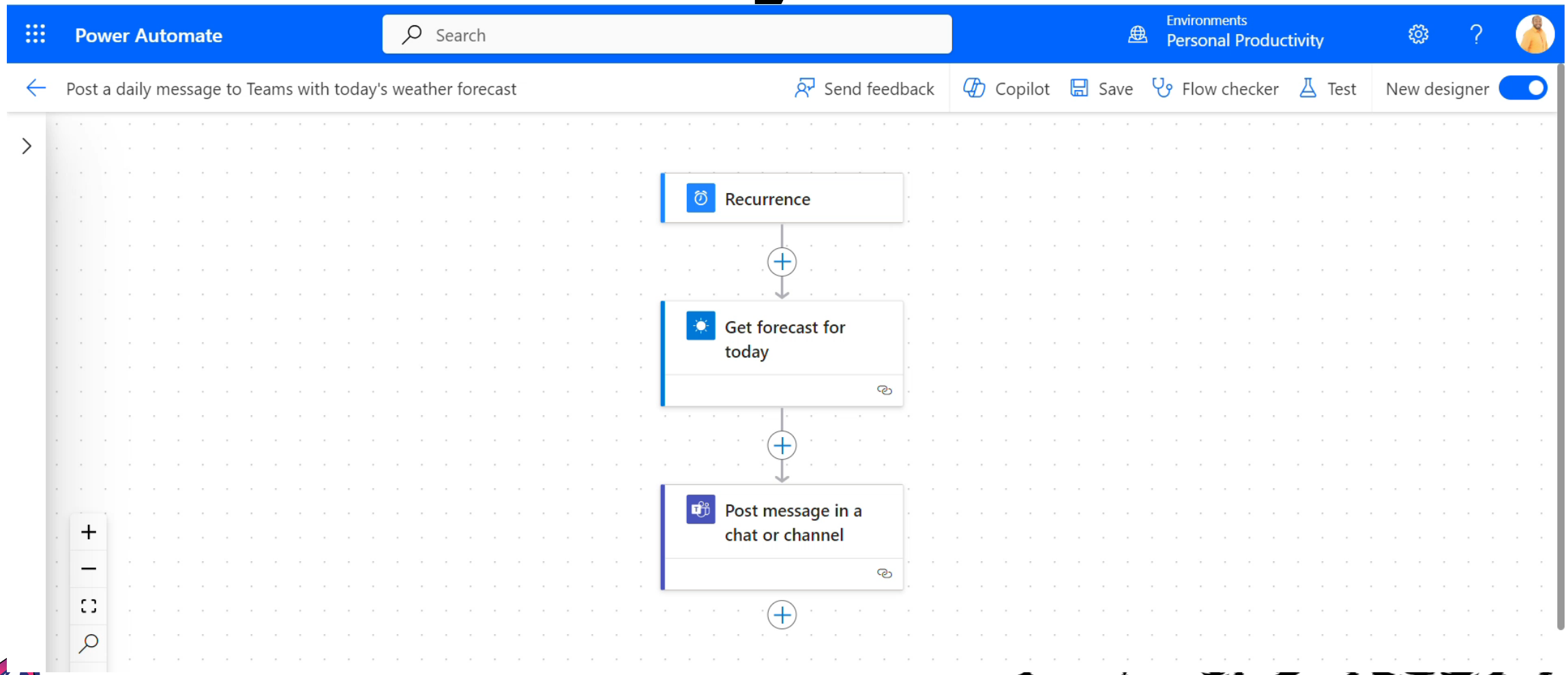


Post daily weather



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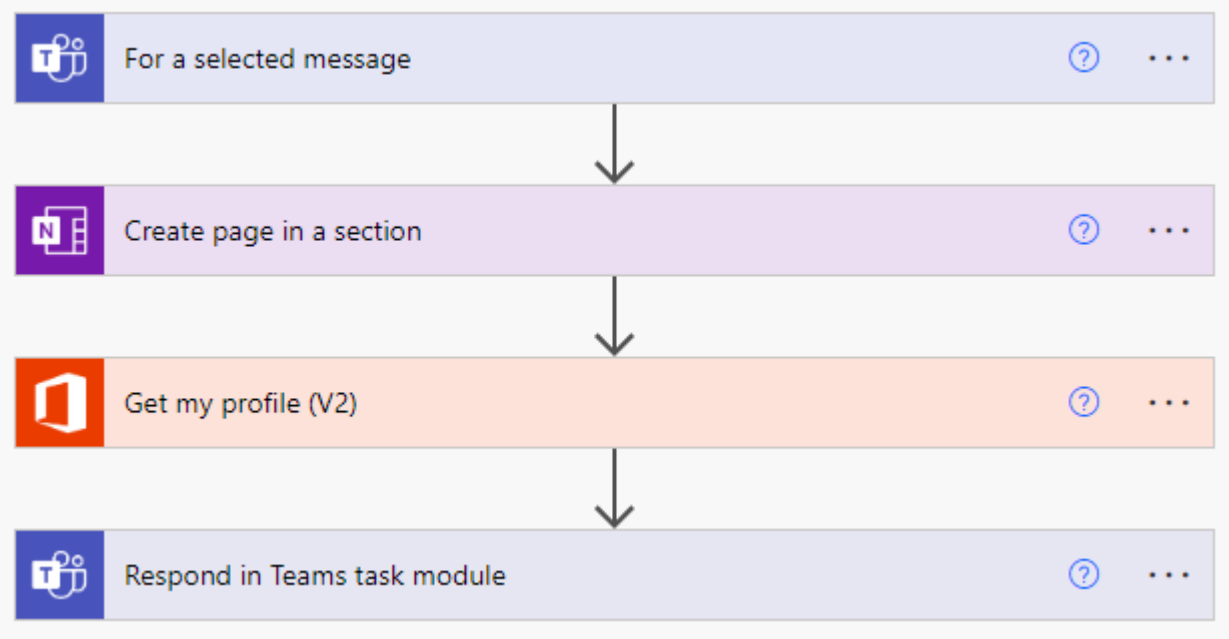
Save to OneNote



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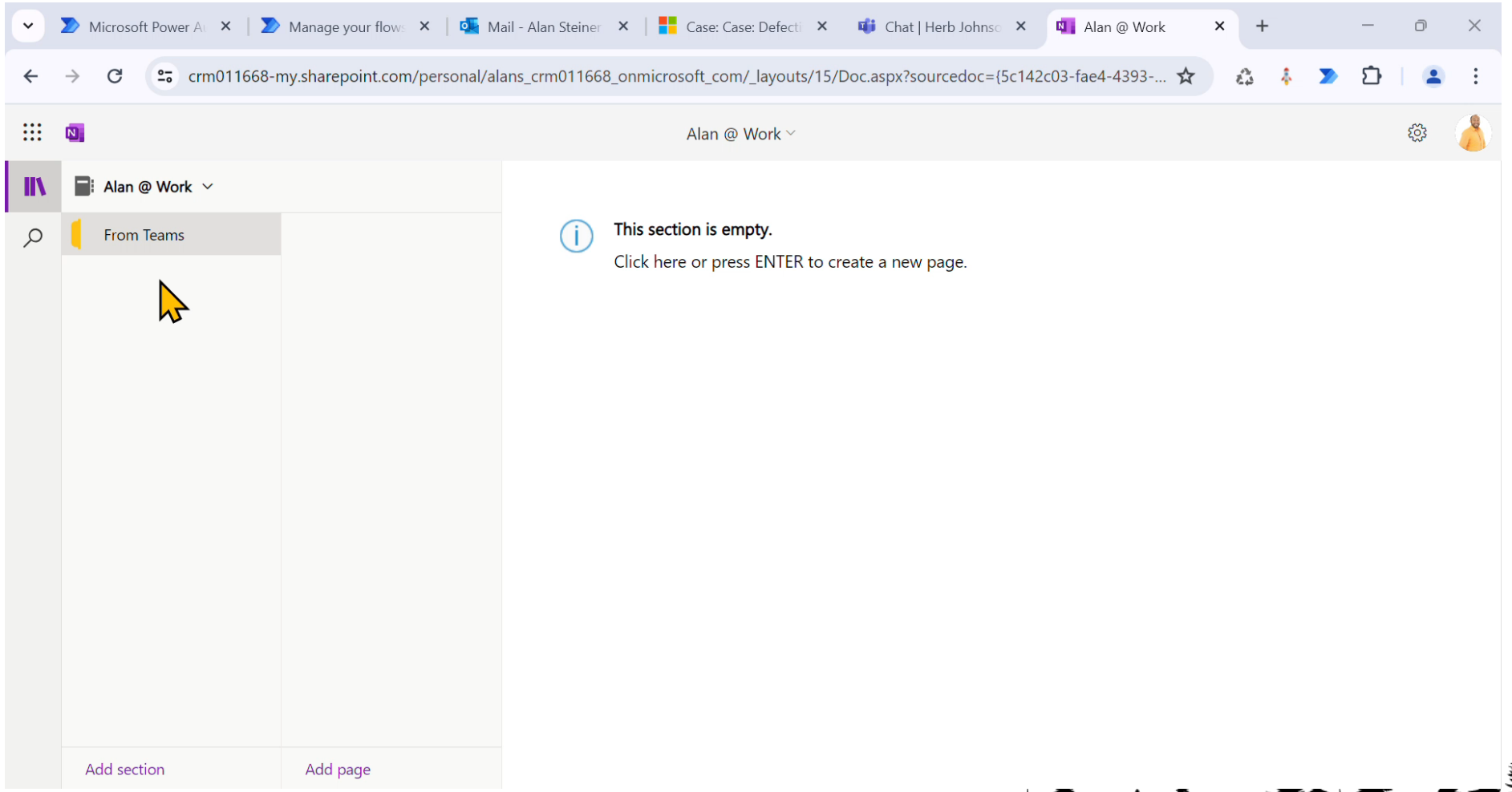

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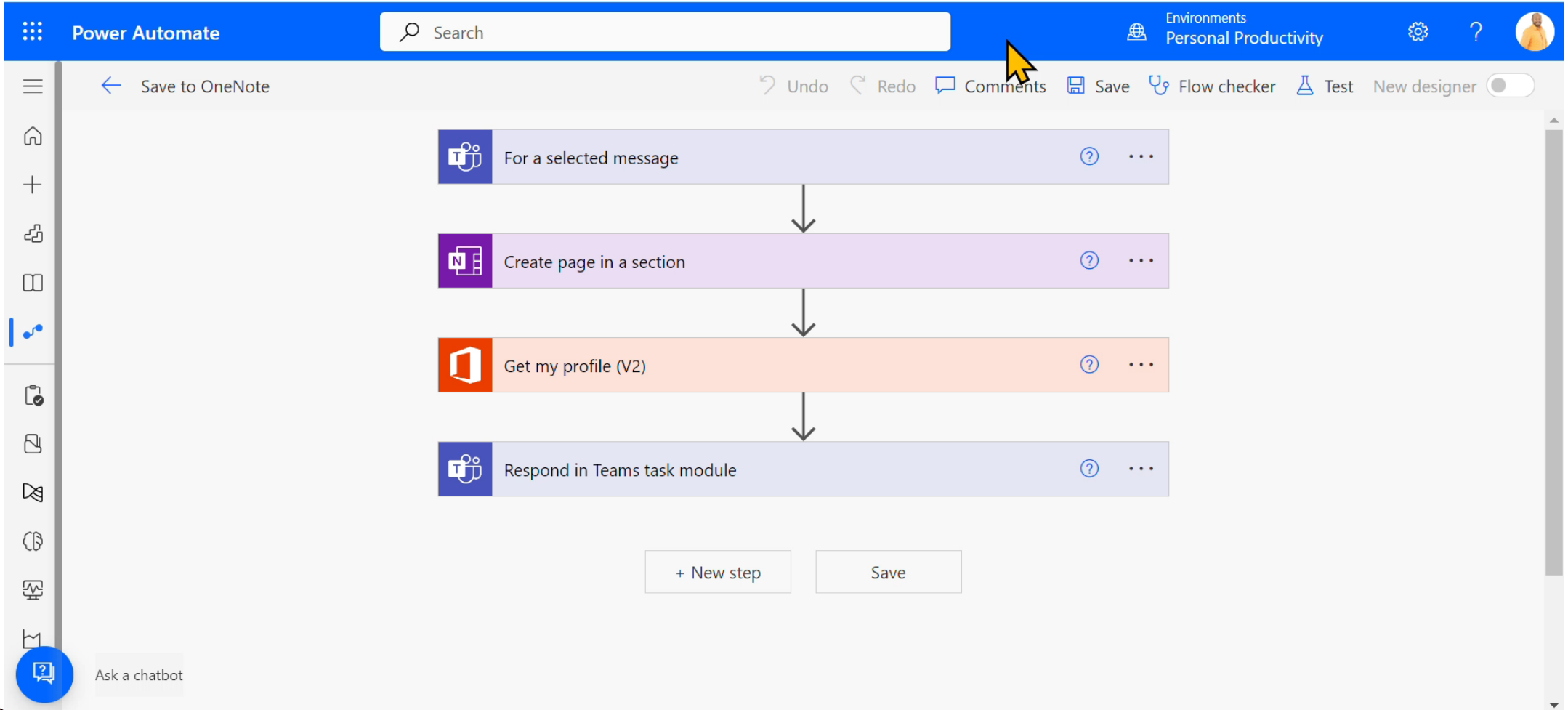

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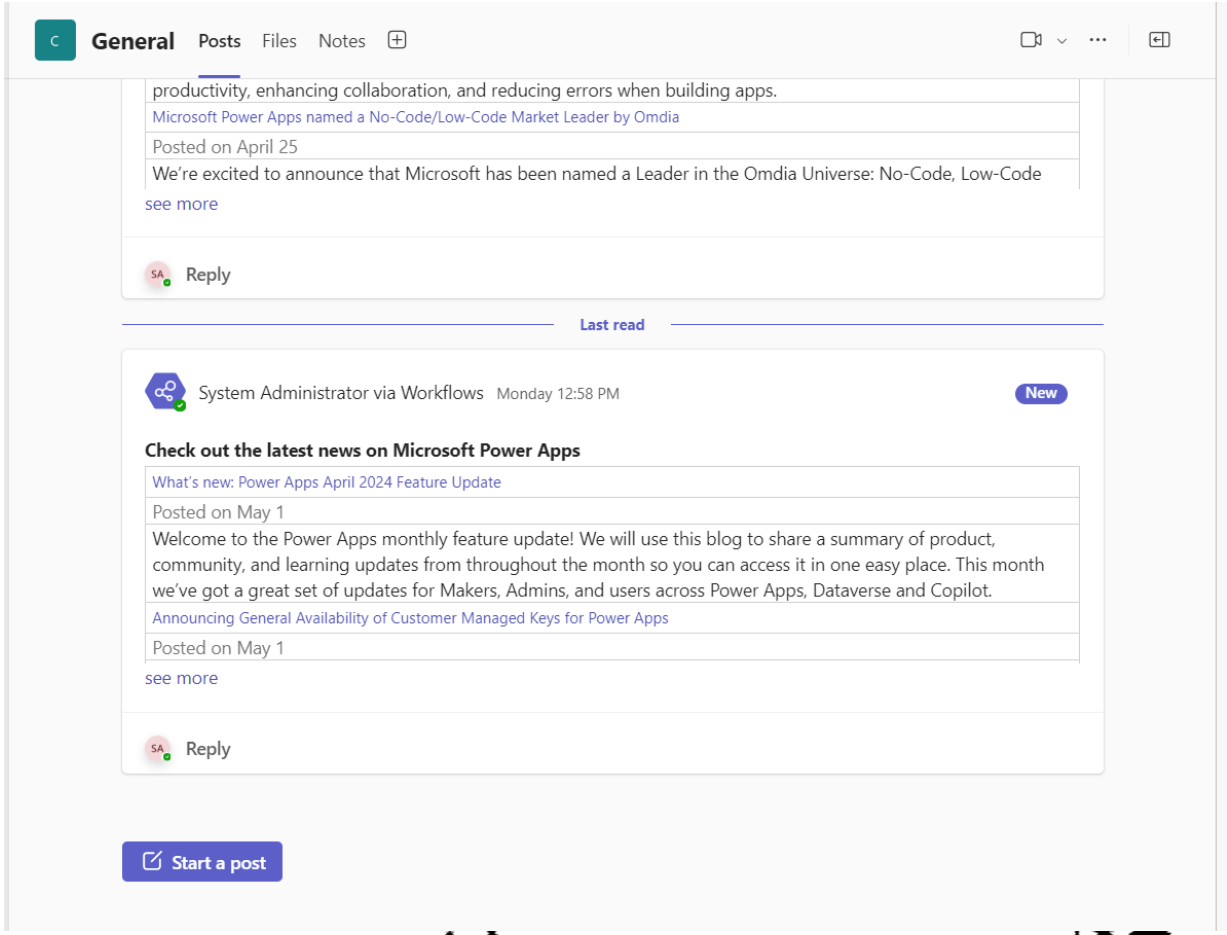
Weekly Digest of Power App Blog Posts in Teams



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Home
Create
Templates
Learn
My flows
Approvals
Solutions
Process mining
AI hub
Desktop flow activity
Connections
Tables
More
Power Platform
Ask a chatbot

Let's automate something. What should it do?

Get started by selecting an example or describing your own automation idea.

Every month, copy all files from OneDrive folder to another OneDrive folder

Copy all rows from an Excel file to another excel file with a click of a button

When a new item is created in SharePoint, send me an email

Describe in detail how you want your automation to work

Generate

Learning for every level

See all

Analyze process mining reports in Power Automate
Beginner 45 min

Analyze your business process with Microsoft...
Beginner 43 min

Register for free 1-day automation workshop
Beginner 8 hr

Au
Rol
Int

Edit | Share | Save As | Delete | Run | Send a copy | Export | Process mining (preview) | Analytics | Turn off | ··· | Flow checker

Flows > Get a weekly digest of the new Power Automate and Power App blog posts

Details

Edit

Flow
Get a weekly digest of the new Power Automate and Power App blog posts

Description
Each week, get a Teams post with a list of all of the Power App + Power Automate blog posts in that week.

Primary owner
System Administrator

Status
On

Created
Apr 29, 01:57 PM

Modified
Apr 29, 01:58 PM

Type
Scheduled

Plan
This flow runs on owner's plan

28-day run history

Edit columns | All runs

Start	Duration	Status
May 14, 10:52 PM (2 min ago)	00:00:03	Succeeded

Connections

Edit

RSS	RSS
Microsoft Teams	admin@CRM011668.on

Co-owners

Edit

SA System Administrator

Process mining (preview)

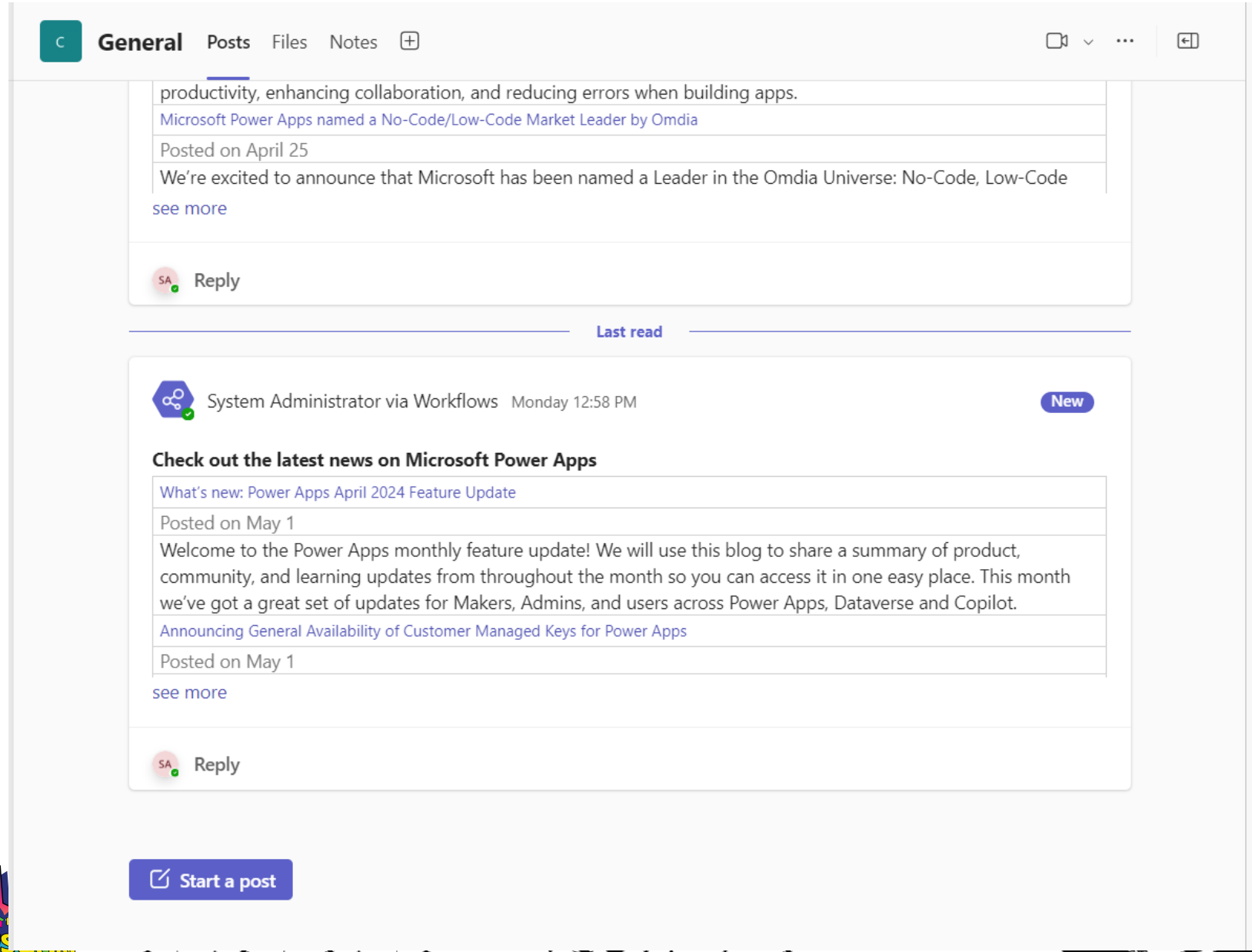
Improve your flow

Average run duration
00:00:06

Associated apps and flows

Edit

Ask a chatbot



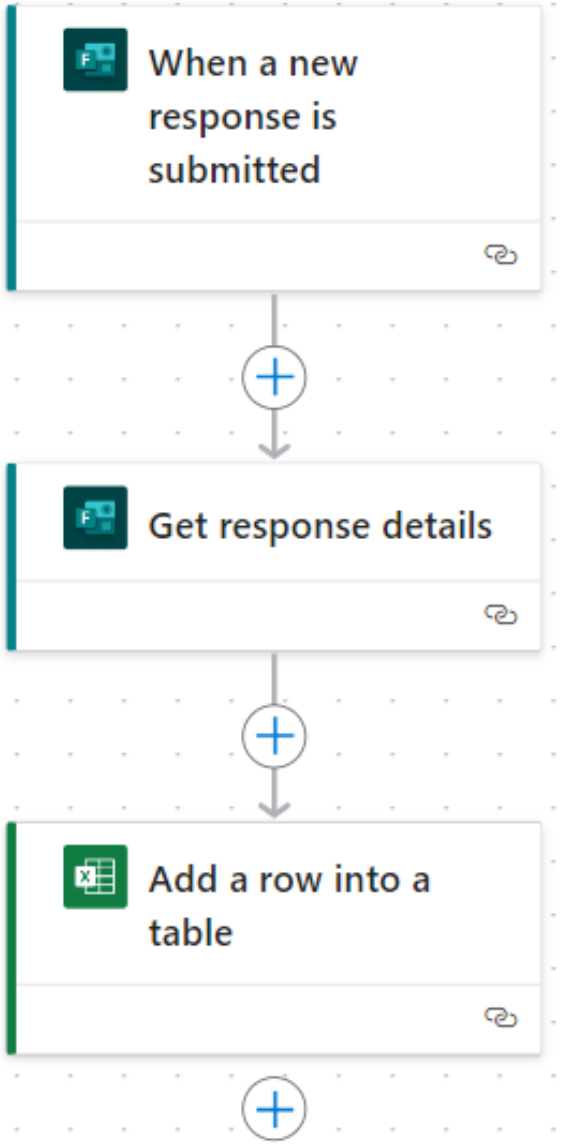
Download this template here!

What are you thinking?

💡 Where might automation help you in your day?
💡 How have you automated something for yourself in the past?

- Scan the QR code to submit your idea.
- Something that will reduce redundancy in your day, week, or month.
- We will discuss responses together and might choose one to walk through the automation.

Add MS Forms Result to Excel



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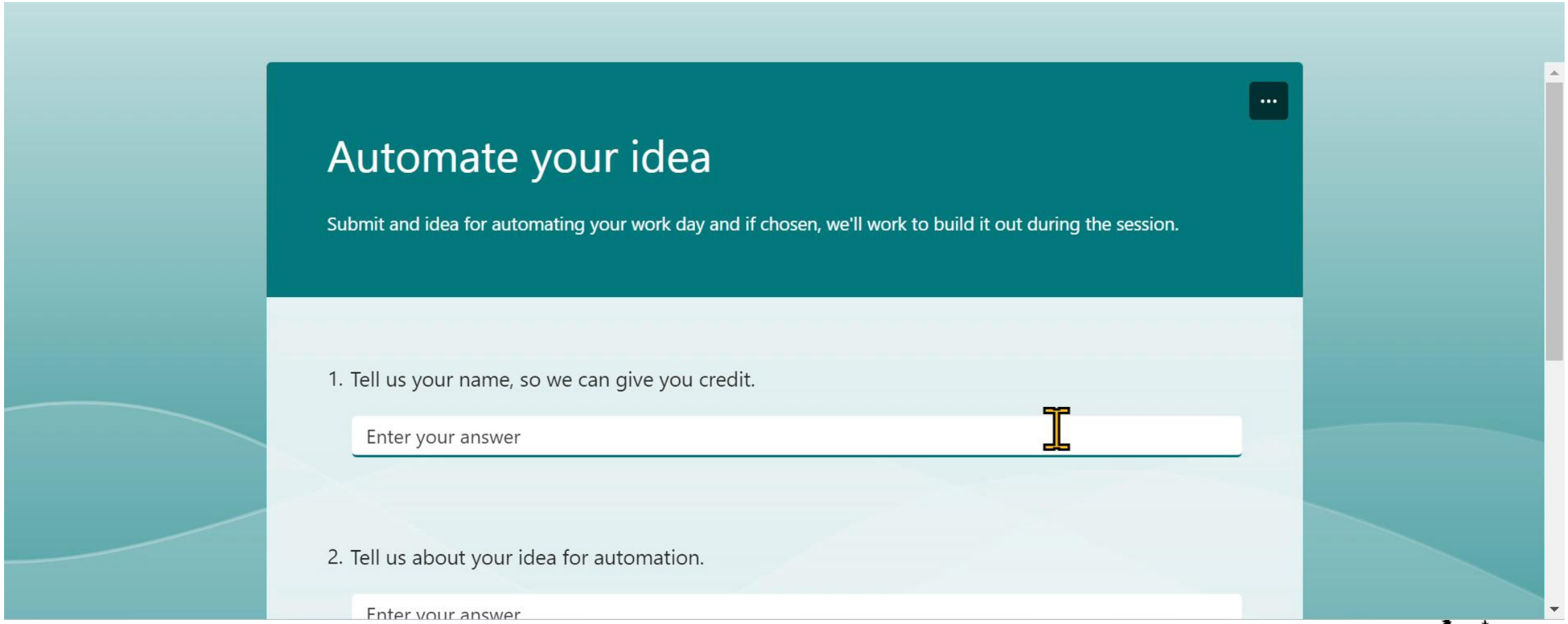
MAY 2024

Add MS Forms Result to Excel



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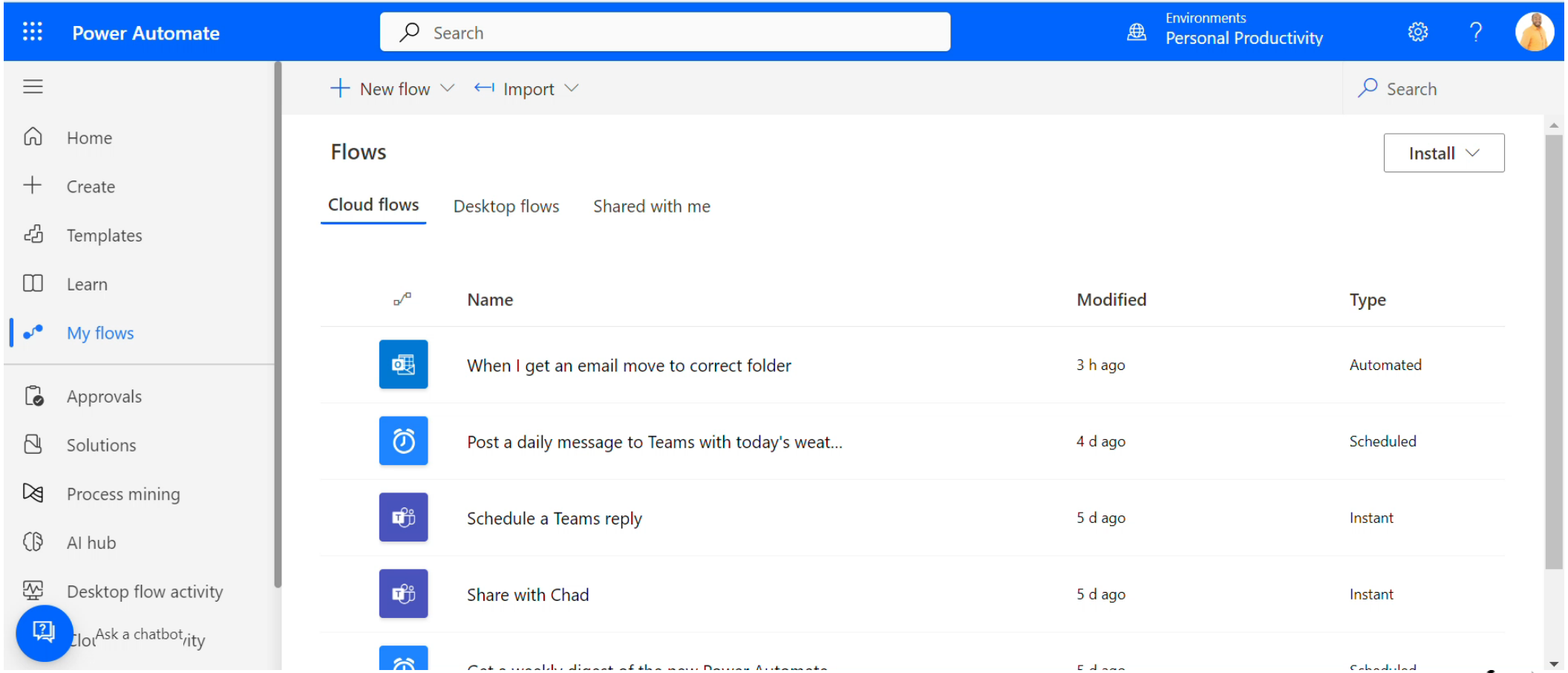
Add MS Forms Result to Excel



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Best Practices & Bonus Tips

- Name consistently
- Anticipate errors
- Document via notes on actions
- Description – let Copilot give that to you
- Monitor flows
- Work with IT if you can. Solutions are preferred.
- Learn from others

2023

2023 Power Automate Coding Standards

MATTHEW DEVANEY

LAST UPDATED: 2023-09-09

What's it cost me?

- Included with Microsoft 365
- Included with Dynamics 365
- Windows 11 for Power Automate Desktop
- Licensing needed for connecting desktop flows to cloud flows
  - Attended vs. Unattended

**See Power Platform Licensing Guide*

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Thank You for attending

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