

The background features a stylized cityscape with various skyscrapers in shades of blue, purple, and pink. A bright yellow and orange gradient sky is visible behind the buildings. In the upper left, a small blue silhouette of a superhero flying through the air is shown. In the lower right, a fountain with two figures in superhero costumes (one in blue and red, the other in purple and blue) sitting on its base is depicted. The text '2025 DYNAMICS CON' is rendered in a large, bold, yellow font with a thick black outline, slanted upwards from left to right. The word '2025' is positioned above 'DYNAMICS', and 'CON' is positioned below 'DYNAMICS'.

# 2025 DYNAMICS CON

# Getting Started with Power I am tired of doing Automate for Dynamics 365 Final & support train

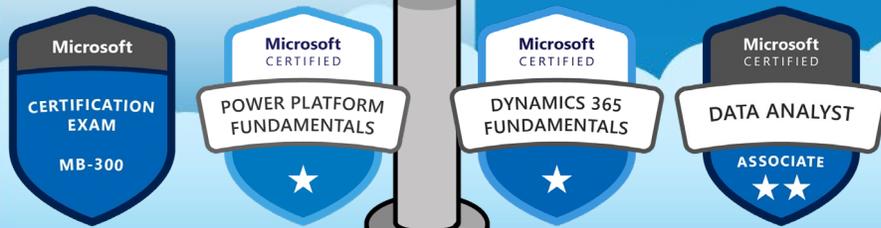


# Dan Edwards, CPA

Managing Director @Crowe LLP  
Adjunct Professor @ Vanguard University



- 35+ years specializing in technology solutions
- Focused on financial and operational solutions
- Experienced with many ERP, Reporting and BI solutions
- Active with many D365/Power Platform user groups



# Agenda

- What is Power Automate and why would you use it?
- Power Automate vs. Dynamics workflow
- Using Power Automate with D365 workflow
- Connecting Power Automate & D365
- Build out some examples
  - Sending welcome emails
  - Publishing information
  - Loading journals
- Power Automate Desktop example
- Power Platform ALM



# Session Objectives

Understand how Power Automate can improve your D365 F&SC user experience

Understand how a user with very limited training can easily create a Power Automate flow

See some examples of how other companies use Power Automate with D365 F&SC



# What is Power Automate?

A tool to make life easier



# What is Power Automate?

Power Automate is a service that you can use to automate repetitive tasks to bring efficiencies to any organization.

- Automate business processes
- Send automatic reminders for past due tasks
- Move business data between systems on a schedule
- Connect to more than 500 data sources or any publicly available API
- You can even automate tasks on your local computer like computing data in Excel.



# Types of flows

- Cloud flows
- Desktop flows
- Business process flows



# Cloud flows

Create a cloud flow when you want your automation to be triggered either automatically, instantly, or via a schedule.

Flow type	Use case	Automation target
Automated flows	Create an automation that is triggered by an event such as arrival of an email from a specific person, or a mention of your company in social media.	<a href="#">Connectors</a> for cloud or on-premises services connect your accounts and enable them to talk to each other.
Instant flows	Start an automation with a click of a button. You can automate for repetitive tasks from your desktop or mobile devices. For example, instantly send a reminder to the team with a push of a button from your mobile device.	Wide range of tasks such as requesting an approval, an action in Teams or SharePoint.
Scheduled flows	Schedule an automation such as daily data upload to SharePoint or a database.	Tasks that need to be automated on a schedule.



# Power Automate cloud flow interface

The screenshot displays the Power Automate interface for a cloud flow named "Notify credit review due". The interface includes a left-hand navigation pane with options like Home, Approvals, My flows, Create, Templates, Connectors, Data, Monitor, AI Builder, Process advisor, Solutions, and Learn. The main workspace shows a flow diagram with the following steps:

- Recurrence**: The starting point of the flow.
- Lists items present in table**: A connector step to retrieve data from a table.
- Initialize variable**: A step to set up a variable for use in the condition.
- Condition**: A decision step with the logic: "{x} Record C... x is greater than 0".
- If yes path**: Contains four actions:
  - Select 2**: A connector action.
  - Create HTML table 2**: An action to generate HTML content.
  - Compose 2**: An action to format the message.
  - Post message in a chat or channel 2**: An action to send the message.
- If no path**: Currently empty, with an "Add an action" button.

The top of the interface features a search bar, environment information ("Environments crowe"), and utility buttons for Undo, Redo, Comments, Save, Flow checker, and Test. A chatbot icon is visible in the bottom left corner.



# Desktop flows

Desktop flows are addressed to essentially everyone who is performing simple or complex rule-based tasks on their workstations. Users at home, small businesses, enterprises, or larger companies can leverage automation capabilities in Power Automate to create flows, interact with everyday tools like email and Excel, or work with modern and legacy applications. Examples of simple and complex tasks you can automate are:

- Quickly organize your documents using dedicated files and folders actions
- Accurately extract data from websites and store them in Excel files using web and Excel automation
- Apply desktop automation capabilities to put your work on autopilot



# Power Automate desktop interface

The screenshot displays the Power Automate desktop interface for a flow titled "D365 Desktop Flow - Inventory Counting Journal". The interface is divided into several sections:

- Actions:** A list of actions on the left side, including Variables, Conditionals, Loops, Flow control, Run flow, System, Workstation, Scripting, File, Folder, Compression, UI automation, HTTP, Browser automation, Work queues (Preview), Excel, AI Builder, Database, Email, Exchange Server, Outlook, Message boxes, Mouse and keyboard, Clipboard, Text, Date time, PDF, CMD session, Terminal emulation, OCR, Cryptography, Windows services, and XML. A search bar is present at the top of this section.
- Flow Canvas:** The main workspace showing a sequence of 7 actions:
  - Remove hard coded URL from input var
  - Run subflow Excel
  - Launch new Microsoft Edge (Launch Microsoft Edge, navigate to `inputSiteURL` and store the instance into `Browser`)
  - Run subflow LoginSCM
  - Run subflow Create Counting Journal
  - Run subflow Enter Counting Journal Info
  - Close web browser (Close web browser `Browser`)
- Variables:** A panel on the right side showing input/output variables and flow variables. The input/output variables include DesktopFlow..., inputExcelFile, inputSCMUser..., inputSiteURL (with value `https://crowe.sand...`), and OutputJournal. The flow variables include Browser, CurrentItem, ExcelData, ExcelInstance, FirstFreeColumn, and FirstFreeRow.
- Bottom Bar:** A status bar at the bottom showing "Status: Ready", "0 Selected actions", "7 Actions", "7 Subflows", and a "Run delay" of 100 ms.



# Business process flows

Business process flows provide a guide for people to get work done. They provide a streamlined user experience that leads people through the processes their organization has defined for interactions that need to be advanced to a conclusion of some kind. This user experience can be tailored so that people with different security roles can have an experience that best suits the work they do.



# Business process example

← Save Save & Close + New Refresh Close as Won Close as Lost Recalculate Opportunity Assign Email a Link Delete

Contoso  
Opportunity · DataverseBI - Sales Insights

**Stages in a business process flow**

Opportunity Sales Process Active for less than one mi... | Qualify (< 1 Min) | Develop | Propose | Close | In Progress | Amy T Owner

Summary Product Line Items Related

Topic	* Contoso
Opportunity Key	WOG-00100
Contact	---
Account	---
Purchase Timeframe	---
Currency	* US Dollar
Budget Amount	---
Purchase Process	---

Active for less than one minute

- Identify Contact
- Identify Account
- Purchase Timeframe
- Estimated Budget
- Purchase Process
- Identify Decision Maker  mark compl...
- Capture Summary

Next Stage >

**Pin stage flyout to the side pane**

**Steps in the active stage**

started

All records in your timeline.

**Advance to the next stage in the process**

Opportunity score ⓘ

Prioritize smarter with opportunity scores

Get insights into which opportunities are most likely to be won. Ask your admin to set up predictive opportunity scoring for your org. [Learn more](#)

Assistant

No notifications or suggestions



# Why Power Automate?

Power Automate extends workflow and approval beyond what is available with D365 F&O workflow.

Power Automate can access other systems as well as users that are not part of D365 environment.

Power Automate offers more than workflow and approval by automating repetitive tasks and actions.



# Power Automate vs. Dynamics Workflow

Options for automation & approvals



# Power Automate vs D365 Workflow

## Power Automate

- Part of Power Platform
- Can work with business events and entities in D365
- Connects with other software solutions
- Can be used to extend D365 workflow
- Can integrate with MS Teams for approvals

## D365 Workflow

- Built into D365
- D365 includes several built-in workflow types
- Drag/drop design
- Specific to D365 data
- Centralized task list inside of D365



# Where you can use D365 workflow

## General ledger workflow types

- Ledger daily journal workflow
- Ledger allocations journal workflow
- Ledger eliminations journal workflow
- Advanced ledger entry workflow

## Accounts payable workflow types

- Freight Invoice Approval
- Vendor invoice line workflow
- Vendor invoice approval journal workflow
- Proposed vendor changes workflow
- Vendor disbursement journal workflow
- Vendor invoice journal workflow
- Vendor settle promissory note journal workflow
- Vendor redraw promissory note journal workflow
- Vendor invoice workflow
- Vendor bank remittance journal workflow
- Vendor invoice register journal workflow
- Vendor draw promissory note journal workflow

## Accounts receivable workflow types

- Customer free text invoice workflow
- Customer draw bill of exchange workflow
- Customer settle bill of exchange workflow
- Customer redraw bill of exchange workflow
- Customer payment workflow
- Customer protest bill of exchange workflow
- Proposed customer change workflow
- Customer recurring invoice workflow
- Customer bank remittance workflow

## Budgeting workflow types

- Budget plan workflow
- Budget register entry workflow
- Budget account entry workflow
- Commitments approval workflow
- General budget reservation workflow

## Cash and bank management workflow types

- Bank reconciliation journal approval workflow

## Expense management workflow types

- Travel requisition workflow
- Expense line item auto posting
- Expense report auto posting
- Expense line item
- VAT tax recovery
- Cash advance request
- Expense report

## Fixed asset management workflow types

- Ledger post fixed assets journal workflow
- Ledger fixed assets budget journal workflow

## Human resources workflow types

- Worker project experience
- Transfer worker
- Human resources actions workflow
- Change worker fixed compensation
- Worker position of trust
- Worker courses
- Worker loaned amount
- Worker review
- Worker image

- Worker education
- Worker identification number
- Worker skills
- Worker certificates
- Hire worker
- Worker professional experience
- Worker course registration
- Terminate worker

## Organization workflow types

- Signing limits workflow
- Case management workflow
- Document handling

## Procurement and sourcing workflow types

- Invoice received notification workflow -
- Product receipt failed notification workflow
- Vendor rebate approval
- Purchase agreement approval workflow
- Purchase order line workflow
- Unconfirmed product receipt rejection notification workflow
- Purchase requisition line review
- Catalog import approval
- Delivery due date notification workflow
- Vendor add application workflow
- Purchase order workflow
- Catalog import product approval
- Purchase requisition review

## Project management and accounting workflow types

- Review original budget workflow
- Review timesheet line workflow
- Request for quotes workflow
- Resource request line workflow
- Review timesheet workflow
- Review project invoice proposal workflow
- Review project quotation workflow
- Review budget revision workflow

## Inventory management workflow types

- Inventory Adjustment Journal
- Inventory BOM Journal
- Inventory Counting Journal
- Inventory Movement Journal
- Inventory Ownership Change Journal
- Inventory Tag Counting Journal
- Inventory Transfer Journal

## Commerce workflow types

- Retail sales line workflow
- Retail catalog line workflow
- Retail sales quotation line workflow

## Sales and marketing workflow types

- Create customer rebate workflow

## Time and attendance workflow types

- Time and attendance journal registration workflow
- Time and attendance days total workflow



# Using Power Automate with D365 Business Events

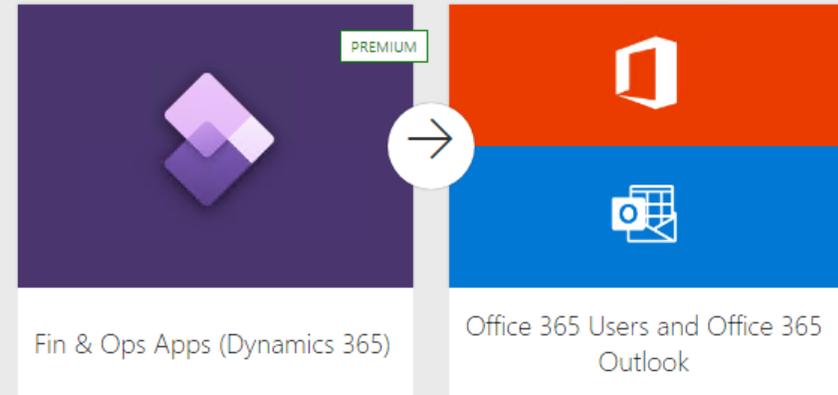
Using the automation options together



# Working with D365 business events

- Out of the box template available for using Power Automate with Dynamics 365 Finance & Operations business events
- Update the template with your instance of D365, and business event information
- Approvals can appear in Microsoft Teams with link back to the record

Send an email when a business event occurs in Dynamics 365 Finance



Respond to data change alerts from Dynamics 365 Finance and Operations by checking the rule identifier and then send an email. In Finance and Operations, ensure the change based alerts batch is running, create an alert, and send it externally. Then trigger the alert and ensure the flow is executed. For more information about creating alerts in Finance and Operations see: <https://docs.microsoft.com/dynamics365/fin-ops-core/fin-ops/get-started/create-alerts>.



Update the template with the Instance of D365. This is in multiple steps

When a Business Event occurs

* Instance	crowe.sandbox.operations.dynamics.com
* Category	Workflow workitem
* Business event	Purchase order workflow (000063) - Approve purchase order
Legal entity	USMF

The Business Event is the Workflow you are using with Power Automate

Parse JSON

\* Content: body

\* Schema

```
{
  "type": "object",
  "properties": {
    "BusinessEventId": {
      "type": "string"
    },
    "BusinessEventLegalEntity": {
      "type": "string"
    },
    "ContextRecId": {
```

Generate from sample

Execute action - validate - workitem

Condition



# Working with Business Events

Finance and Operations | business events | USMF | Contoso Entertainment System USA

Business events catalog security is disabled

Manage Security Options

My view

## Business events

Business event catalog | Data event catalog | Endpoints | Active business events | Inactive business events | Active data events | Inactive data events | Errors | Security

+ Activate

Category	Business event ID	Name
Workflow element	Workflow_PurchReqReview_000081_PurchReqReviewApproval	Replenishment requisition review (000081) - Approve purchase requisitions
Workflow element started	Workflow_PurchReqReview_000081_PurchReqReviewApproval_Started	Replenishment requisition review (000081) - Approve purchase requisitions
Workflow workitem	Workflow_PurchReqReview_000081_PurchReqReviewApproval_WorkItem	Replenishment requisition review (000081) - Approve purchase requisitions
Workflow element	Workflow_PurchReqReview_000081_PurchReqReviewTask	Replenishment requisition review (000081) - Review purchase requisitions
Workflow element started	Workflow_PurchReqReview_000081_PurchReqReviewTask_Started	Replenishment requisition review (000081) - Review purchase requisitions
Workflow workitem	Workflow_PurchReqReview_000081_PurchReqReviewTask_WorkItem	Replenishment requisition review (000081) - Review purchase requisitions
<input checked="" type="checkbox"/> Workflow type	Workflow_PurchTableTemplate_000063	Purchase order workflow (000063)
Workflow element	Workflow_PurchTableTemplate_000063_PurchTableApproval	Purchase order workflow (000063) - Approve purchase order
Workflow element started	Workflow_PurchTableTemplate_000063_PurchTableApproval_Started	Purchase order workflow (000063) - Approve purchase order
Workflow workitem	Workflow_PurchTableTemplate_000063_PurchTableApproval_WorkItem	Purchase order workflow (000063) - Approve purchase order
Workflow element	Workflow_PurchTableTemplate_000063_PurchTableApprovalEdit	Purchase order workflow (000063) - Approve purchase order, editable
Workflow element started	Workflow_PurchTableTemplate_000063_PurchTableApprovalEdit_Started	Purchase order workflow (000063) - Approve purchase order, editable
Workflow workitem	Workflow_PurchTableTemplate_000063_PurchTableApprovalEdit_WorkItem	Purchase order workflow (000063) - Approve purchase order, editable
Workflow element	Workflow_PurchTableTemplate_000063_PurchTableTask	Purchase order workflow (000063) - Review purchase order
Workflow element started	Workflow_PurchTableTemplate_000063_PurchTableTask_Started	Purchase order workflow (000063) - Review purchase order
Workflow workitem	Workflow_PurchTableTemplate_000063_PurchTableTask_WorkItem	Purchase order workflow (000063) - Review purchase order
Workflow element	Workflow_PurchTableTemplate_000063_PurchTableTaskEdit	Purchase order workflow (000063) - Review purchase order (editable)
Workflow element started	Workflow_PurchTableTemplate_000063_PurchTableTaskEdit_Started	Purchase order workflow (000063) - Review purchase order (editable)
Workflow workitem	Workflow_PurchTableTemplate_000063_PurchTableTaskEdit_WorkItem	Purchase order workflow (000063) - Review purchase order (editable)
Workflow type	Workflow_ResRequest_000212	Resource request (000212)

### Purchase order workflow (000063)

Workflow type

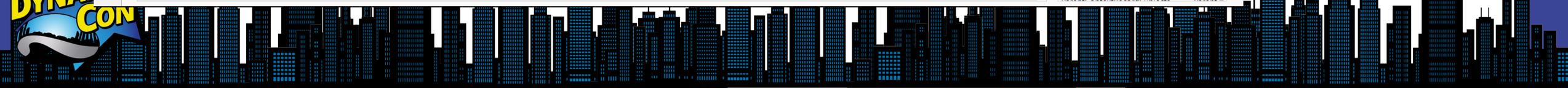
Business events for the Purchase order workflow (000063) workflow type. Use these events to respond to workflow level events such as started, stopped, and completed.

**Fields passed to event**

Download schema

Field name	Field ID
WorkflowCorrelationId	Correl.
ContextRecId	Conte:
WorkflowConfigurationId	Workfl
BusinessEventId	Busine
BusinessEventLegalEntity	Legal
ControlNumber	Busine
EventId	Busine
EventTime	Event
EventTimeIso8601	Event
MajorVersion	Major
MinorVersion	Minor
InitiatingUserAADObjectId	Initiati
ContextRecordSubject	Conte:
ParentContextRecordSubject	Conte:

Download the schema to create the JSON







# Demonstration



# Connecting Power Automate with D365 F&SCM



# Demonstration



# Let's look at some examples



# Sending Welcome Emails

Improving the vendor on-boarding process





# Demonstration



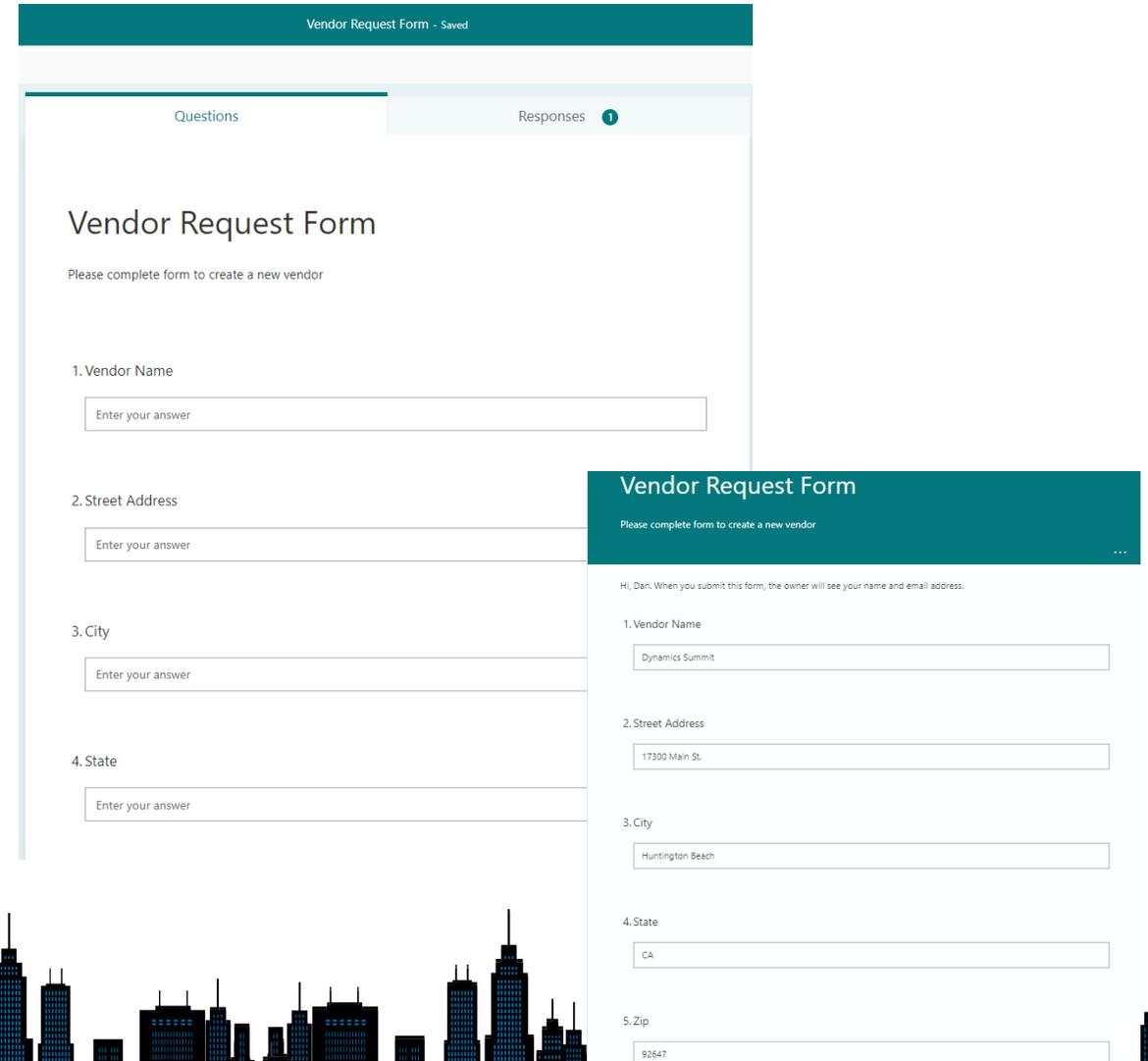
# Sending Welcome Emails

- SCENARIO – When onboarding a new vendor our organization requires a new vendor request be submitted, there is an internal review and approval process that is followed by the sending of an email to the vendor with a blank W-9 for completion



# Requesting a vendor with a form

- Microsoft Form can be used on the Web, via Email, QR codes or in Teams
- With Power Automate – a completed form can create a record in D365 Finance



The image shows a Microsoft Form titled "Vendor Request Form" with a green header. The form is displayed in a "Responses" view, showing one response. The form fields are:

- 1. Vendor Name: Dynamics Summit
- 2. Street Address: 17300 Main St.
- 3. City: Huntington Beach
- 4. State: CA
- 5. Zip: 92647

The form also includes a greeting: "Hi, Dan. When you submit this form, the owner will see your name and email address."

# Setting up the flow

Create a new flow – “Automated cloud flow”

The flow trigger is “When a new response is submitted” from Microsoft Forms

Build an automated cloud flow



Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

Flow name  
New Vendor Request

Choose your flow's trigger \* ⓘ

Search all triggers

- When a new response is submitted  
Microsoft Forms ⓘ
- When an item is created  
SharePoint ⓘ
- When an item is created or modified  
SharePoint ⓘ
- When a file is created in a folder  
SharePoint ⓘ
- When a file is created  
OneDrive for Business ⓘ
- When a task is assigned to me  
Microsoft To Do ⓘ

Skip Create Cancel

# Choose the correct form

- Select the appropriate form
- Add a set to get the response details from the form

The screenshot displays a Power Automate flow configuration with two steps:

- Step 1: When a new response is submitted**
  - Form Id: Vendor Request Form
- Step 2: Get response details**
  - Form Id: Vendor Request Form
  - Response Id: Response Id

A plus sign icon with a downward arrow is positioned between the two steps, indicating the addition of a new step.

# Setup the approval

Start and wait for an approval

\* Approval type: Approve/Reject - First to respond

\* Title: New Vendor Approval

\* Assigned to: AP Department

Details

Vendor Name: Vendor name

Vendor Address: Street Address, City, State, Zip

Vendor Email: Email

Vendor Phone: Phone

Vendor Group: Vendor Group

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Show advanced options

# Approved or Rejected

Condition

Outcome x is equal to Approve

+ Add

✓ If yes

Add a new row

Send an email (V2) 2

Add an action

✗ If no

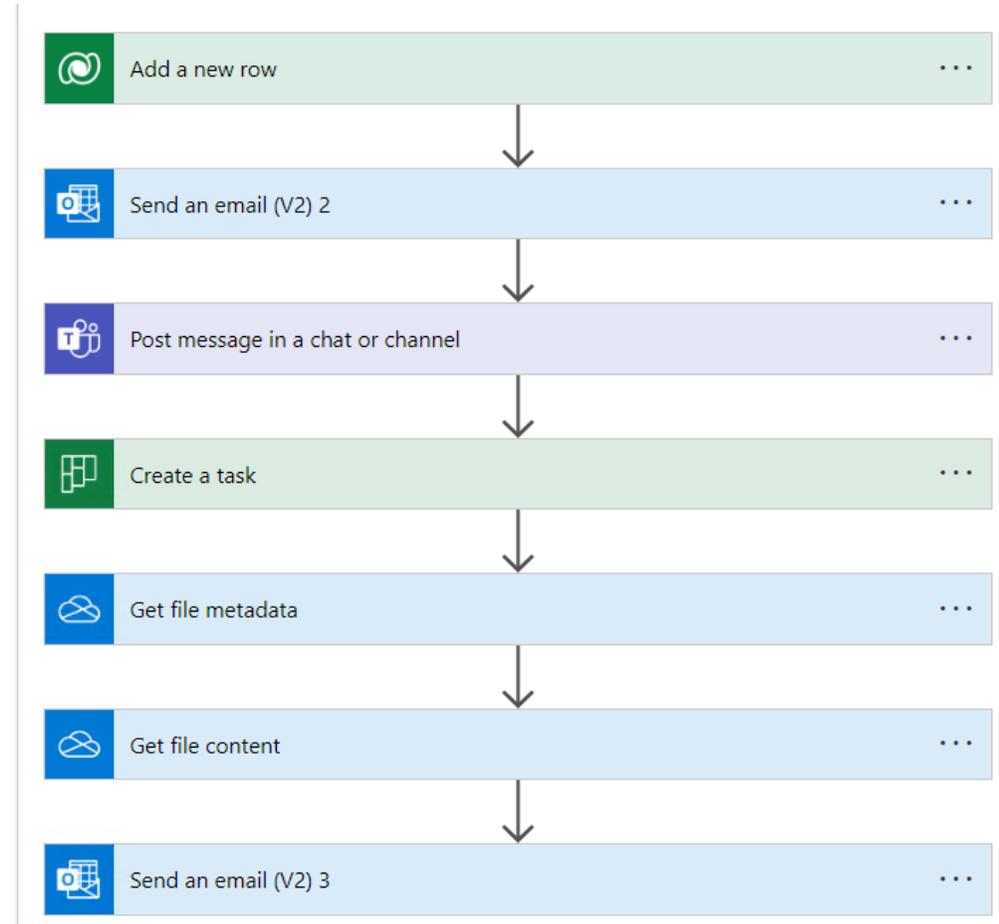
Apply to each

Add an action



# If approved, notify AP & send W9

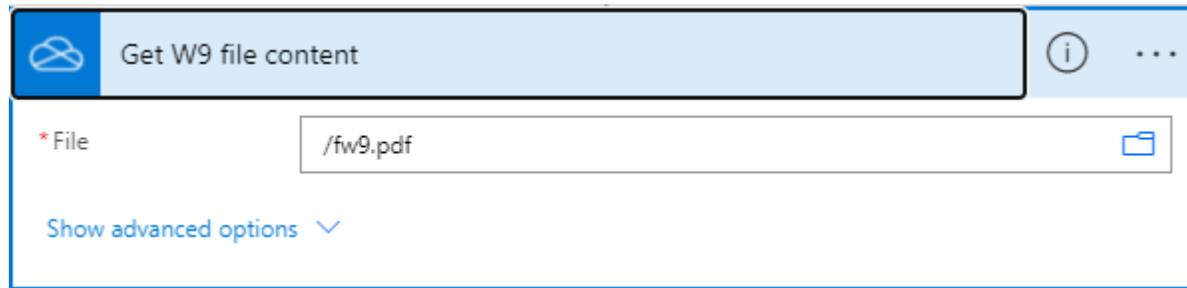
- Add steps to the flow
  - Create vendor in D365
  - Put vendor on hold
  - Post message on Teams to let AP know
  - Get W9 metadata from OneDrive for Business
  - Get W9 file content from OneDrive for Business
  - Send W9 form to the Vendor



# Get W9 file content

Add an action to get the file content from OneDrive for Business

*Use the folder to lookup the file name*



# Send W9 form to Vendor

- Insert an action to send an email to the vendor. This will use the Outlook connector – Send an email (V2).
- Use the fields from the Get New Vendor Record step to populate the email.
- Expand the connector to show advanced functions and add file name from OneDrive and file content from OneDrive

Send an email (V2)

\*To: Primary email x

\*Subject: W-9 Request

\*Body: Hello and thank you for working with Contoso Entertainment. In order to complete the setup of your vendor record, we will need a completed and signed W9 form. A blank form is attached for your convenience. Please return as soon as possible.  
Thank you,  
Accounts Payable Department

From (Send as): Email address to send mail from (requires "Send as" or "Send on beh

CC: Specify email addresses separated by semicolons like someone@con

BCC: Specify email addresses separated by semicolons like someone@con

Attachments Name - 1: Name x

Attachments Content - 1: Body x

+ Add new item

Sensitivity: Sensitivity

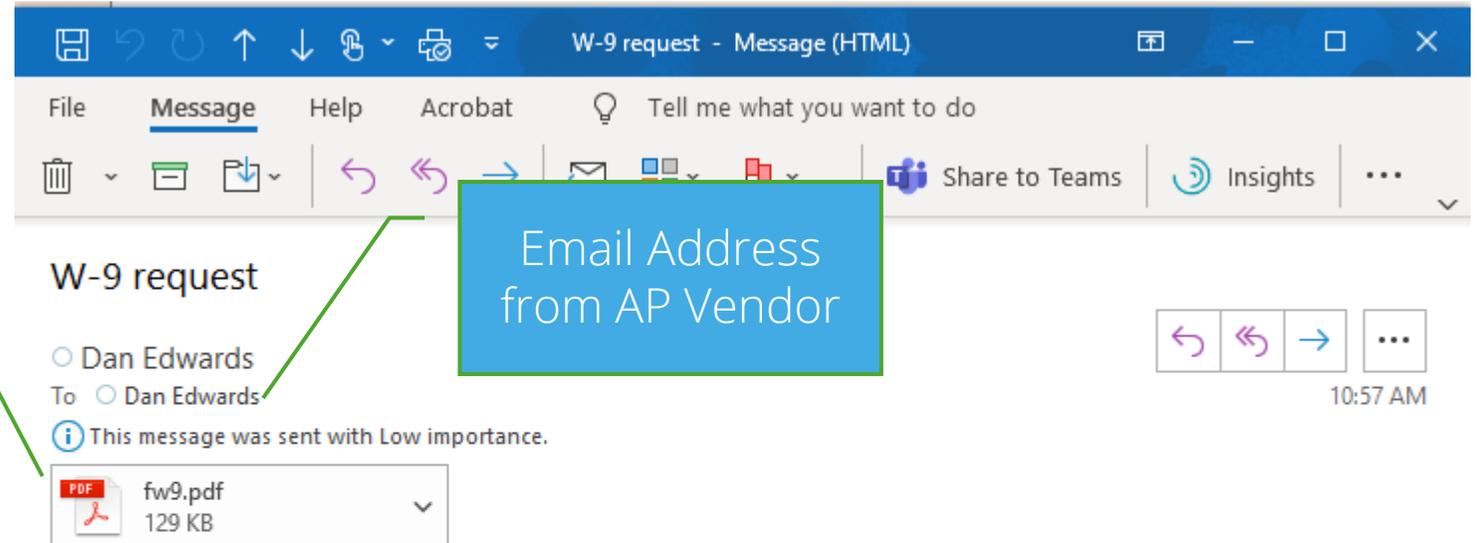
Reply To: The email addresses to use when replying

Importance: Importance

Hide advanced options ^



# Sample Email



Hello and thank you for working with Contoso Entertainment. In order to complete the setup of your vendor record, we will need a completed and signed W9 form. A blank form is attached for your convenience. Please return as soon as possible.

Thank you,  
Accounts Payable Department



# Demonstration



# Publishing Information

Sharing information with the team



# Publishing information

Scenario – our credit team routinely reviews our customers' credit limits. They would like to get a list of customers scheduled for review on a weekly basis



# Where the data comes from

The screenshot displays the 'Customer Card' for 'US-001 : Contoso Retail San Diego' in Microsoft Dynamics 365 Finance and Operations. The card is divided into several sections: General, Addresses, Contact information, Miscellaneous details, Sales demographics, and Credit and collections. The 'Credit and collections' section is expanded, showing a table with columns for GENERAL, TOTAL CREDIT LIMIT, CREDIT REVIEW, STATUS, and COLLECTIONS. The 'CREDIT REVIEW' column contains the following data:

GENERAL	TOTAL CREDIT LIMIT	CREDIT REVIEW	STATUS	COLLECTIONS
Credit rating Excellent	Credit limit 150,000.00	Last review date 1/31/2018	Account status Open	Invoicing and delivery on hold No
Mandatory credit limit <input type="radio"/> No	Credit limit in customer's currency (US... 150,000.00	Next scheduled review date 9/16/2022	Account status reason	Collections contact
Unlimited credit limit <input type="radio"/> No	Insurance and guarantees 0.00	ELIGIBLE CREDIT LIMIT	With collection agency <input type="radio"/> No	Default write-off reason
Exclude from credit management <input type="radio"/> No	Total credit limit 150,000.00	Eligible credit limit 0.00	Title held <input type="radio"/> No	Exclude interest charges <input type="radio"/> No
Credit management group	Credit limit expiration date 12/31/2023	Eligible credit limit currency USD	RISK	Exclude collection fees <input type="radio"/> No
	Credit limit change date 4/13/2022	Eligible credit limit change date	Year business established 1/1/2009	
	Customer credit group Contoso		Customer since 1/1/2010	
			NOTES	
			Note	

A blue callout box with the text 'The next scheduled review is entered on the customer card' points to the 'Next scheduled review date' field, which is highlighted with a red box. The date is 9/16/2022.

# Use Power Automate to share data

We will use a scheduled flow to run every Monday

Recurrence

Interval: 1, Frequency: Week

Preview: Runs on Monday every week

Lists items present in table

Instance: crowe.sandbox.operations.dynamics.com

Entity name: CustomersV3

Filter Query: CredManNextSchedReviewDate gt utcNow() and CredManNextSchedReviewDate lt addDays(...)

Initialize variable

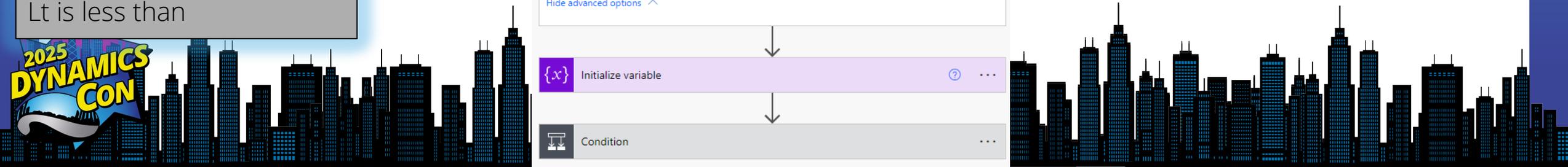
Condition

To get the data from D365 use the F&O connector with CustomersV3 entity

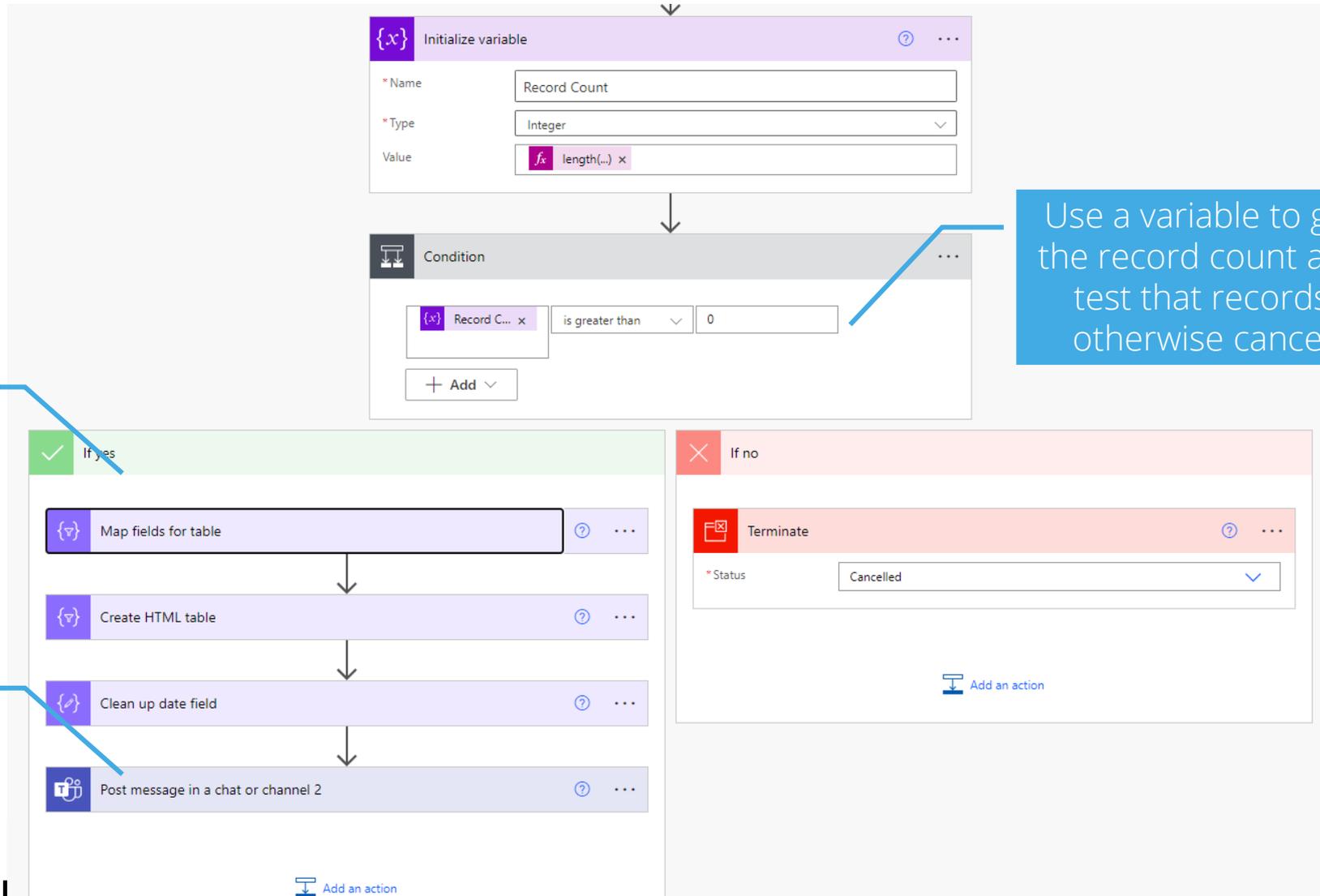
Filter the customers based on the Next Scheduled Review Date

Key info for query syntax

Eq is equals  
Gt is greater than  
Lt is less than



# Use Power Automate to share data



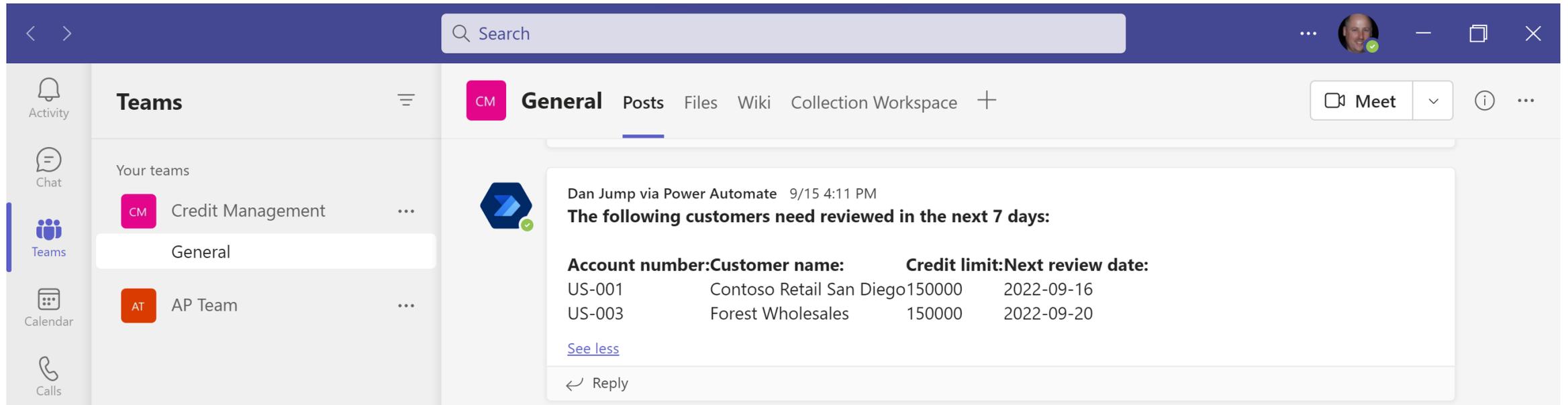
Prepare the data for Teams

Post data to Teams

Use a variable to get the record count and test that records otherwise cancel



# Info displayed in Teams



The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Calendar, and Calls. The main area displays a channel named 'General' within a team named 'Credit Management'. A message from 'Dan Jump via Power Automate' is shown, dated 9/15 at 4:11 PM. The message content is a table of customer data.

Account number:	Customer name:	Credit limit:	Next review date:
US-001	Contoso Retail San Diego	150000	2022-09-16
US-003	Forest Wholesales	150000	2022-09-20

Below the table is a 'See less' link and a 'Reply' button.



# Demonstration



# Loading Data

Because everyone loves Excel

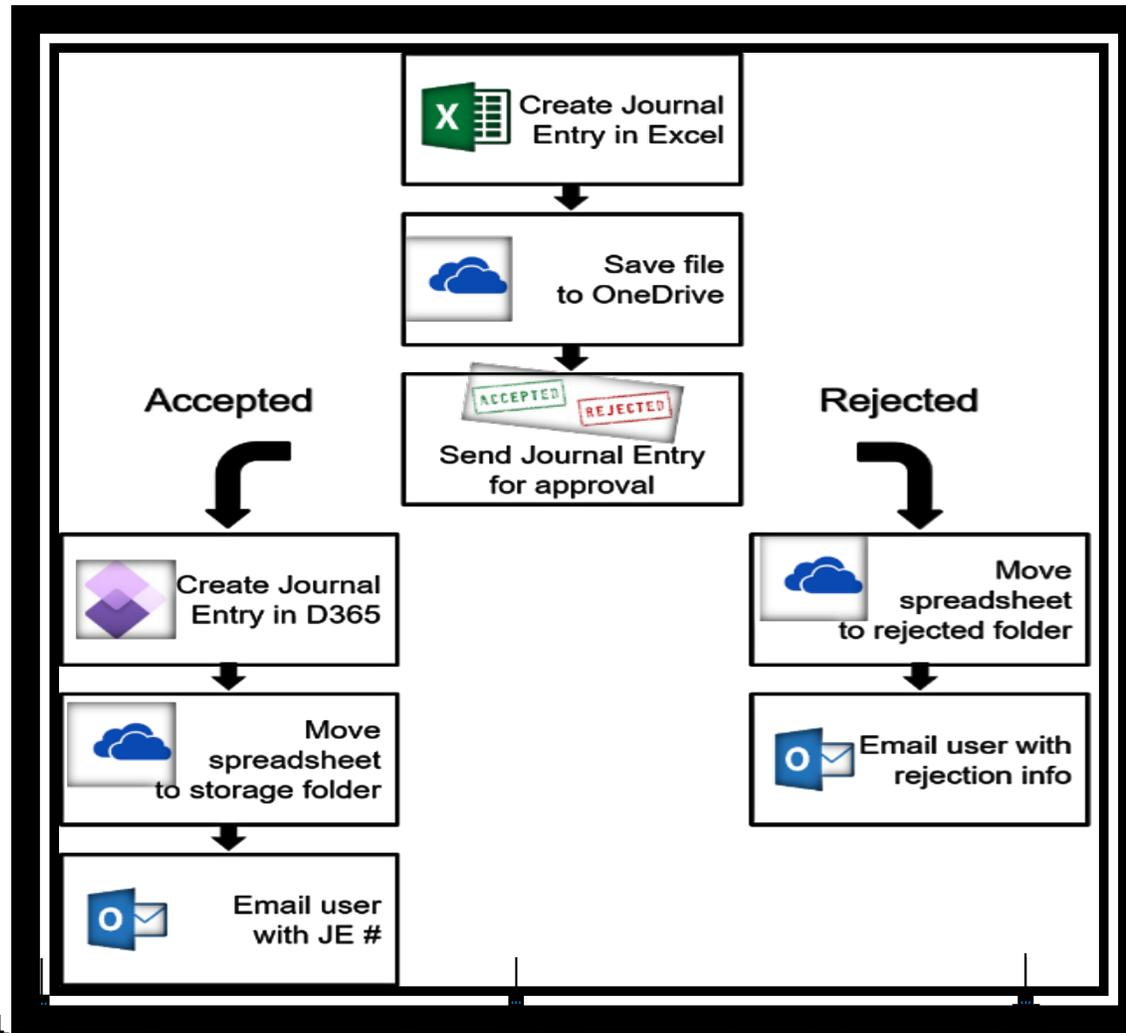


# Loading data

**Scenario** – several users would like to use Excel to create Journal Entries and our organization would like these Excel workbooks reviewed prior to loading anything into D365, and they would like to archive the workbooks.

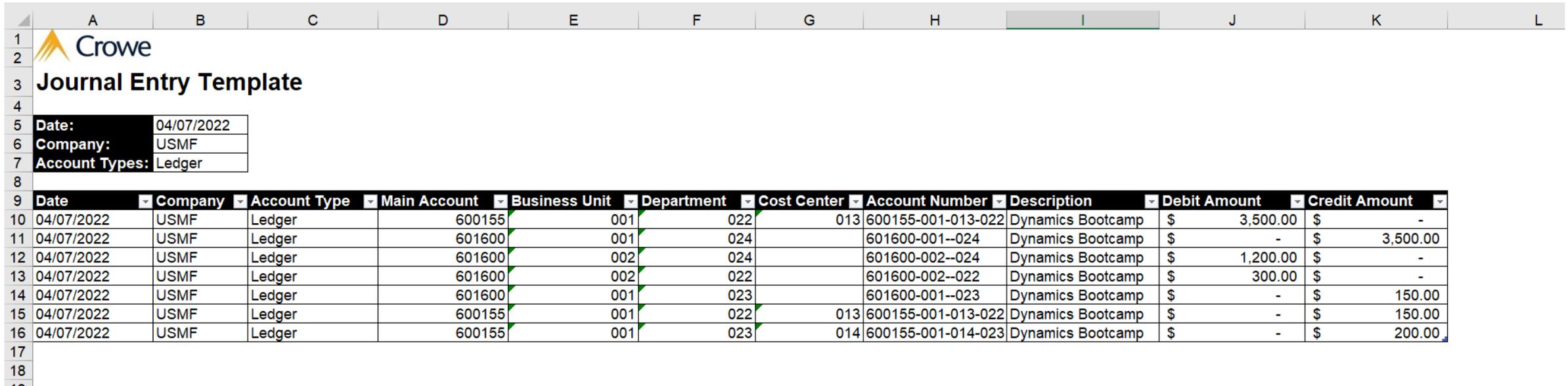


# Process flow



# Create Excel Template

Create a template in Excel. The key is to make sure the lines are formatted as an Excel Table.

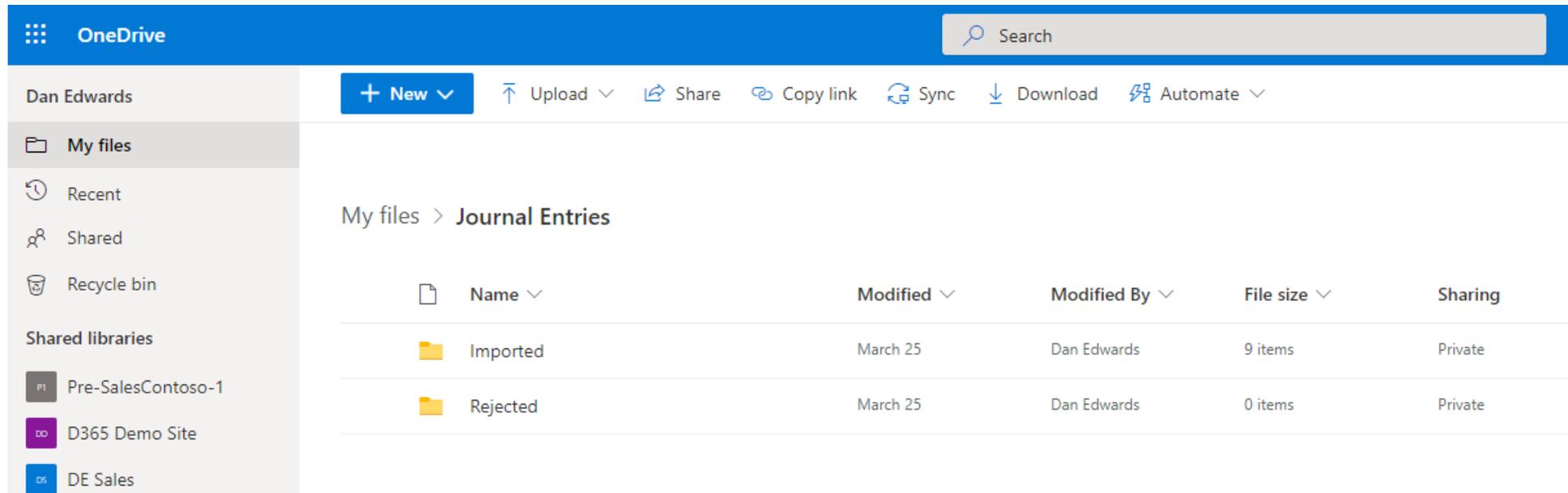


Date	Company	Account Type	Main Account	Business Unit	Department	Cost Center	Account Number	Description	Debit Amount	Credit Amount
04/07/2022	USMF	Ledger	600155	001	022	013	600155-001-013-022	Dynamics Bootcamp	\$ 3,500.00	\$ -
04/07/2022	USMF	Ledger	601600	001	024		601600-001-024	Dynamics Bootcamp	\$ -	\$ 3,500.00
04/07/2022	USMF	Ledger	601600	002	024		601600-002-024	Dynamics Bootcamp	\$ 1,200.00	\$ -
04/07/2022	USMF	Ledger	601600	002	022		601600-002-022	Dynamics Bootcamp	\$ 300.00	\$ -
04/07/2022	USMF	Ledger	601600	001	023		601600-001-023	Dynamics Bootcamp	\$ -	\$ 150.00
04/07/2022	USMF	Ledger	600155	001	022	013	600155-001-013-022	Dynamics Bootcamp	\$ -	\$ 150.00
04/07/2022	USMF	Ledger	600155	001	023	014	600155-001-014-023	Dynamics Bootcamp	\$ -	\$ 200.00



# Create a place to store the file

Create a folder for the Journal Entries as well as subfolders for the imported & rejected files.



The screenshot shows the OneDrive web interface. The top navigation bar includes the OneDrive logo, a search bar, and a menu with options: '+ New', 'Upload', 'Share', 'Copy link', 'Sync', 'Download', and 'Automate'. The left sidebar shows the user 'Dan Edwards' and navigation options: 'My files', 'Recent', 'Shared', 'Recycle bin', and 'Shared libraries' (including 'Pre-SalesContoso-1', 'D365 Demo Site', and 'DE Sales'). The main content area displays the breadcrumb 'My files > Journal Entries' and a table of folders:

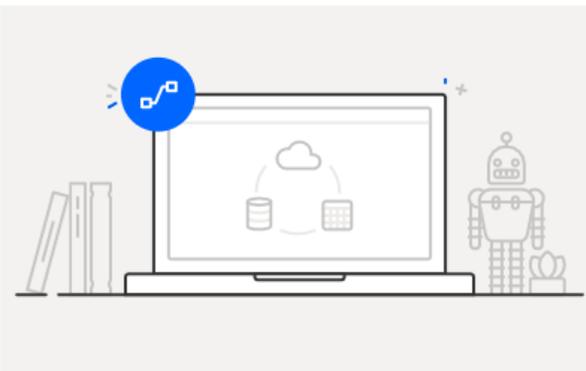
Name	Modified	Modified By	File size	Sharing
Imported	March 25	Dan Edwards	9 items	Private
Rejected	March 25	Dan Edwards	0 items	Private



# Setup flow in Power Automate

Create an automated cloud flow – the trigger is “When a file is created”  
OneDrive for Business

### Build an automated cloud flow



Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

Flow name  
Import Journal Entry

Choose your flow's trigger \* ⓘ

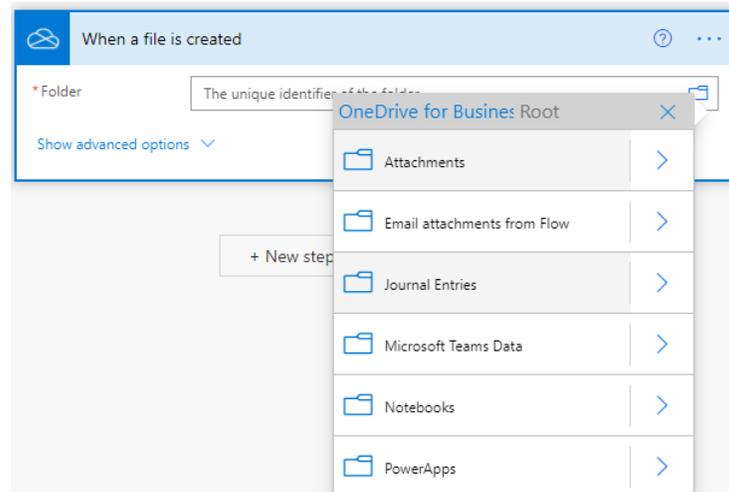
OneDr

- When a file is created (properties on... OneDrive ⓘ
- When a file is created OneDrive for Business ⓘ
- When a file is created OneDrive ⓘ
- When a file is created (properties on... OneDrive for Business ⓘ
- When a file is modified (properties o... OneDrive ⓘ
- When a file is modified (properties o... OneDrive for Business ⓘ

[Skip](#) [Create](#) [Cancel](#)

# Gather Excel spreadsheet information

Select the folder for Power Automate to monitor



Select the folder that was created in OneDrive in the step above. When a file is created or saved into this folder, it will trigger the Flow to begin the process.

# Get file metadata

Get the file information on the files that has been saved in OneDrive

The screenshot shows a workflow editor window titled "Get file metadata". Inside the window, there is a search bar with the text "File identifier x" and a button labeled "Add dynamic content". Below the search bar are two buttons: "+ New step" and "Save".

A dropdown menu is open, showing a list of dynamic content options. The menu has a search bar labeled "Search dynamic content" and a section titled "When a file is created". The options listed are:

- File identifier**: The unique identifier of the file or folder.
- File name**: The name of the file or folder.
- File path**: The path of the file or folder.
- File entity tag**: The etag of the file or folder.
- File content type**: The content type of the file or folder.
- File content**: The content of the file.



# Create share link

The approver might want to review the spreadsheet prior to approval, so it is necessary to make sure that the approver has access to the file. This is achieved by creating a share link to the file. To create the share link and an additional step with the Action of Create share link from the OneDrive for Business connector.

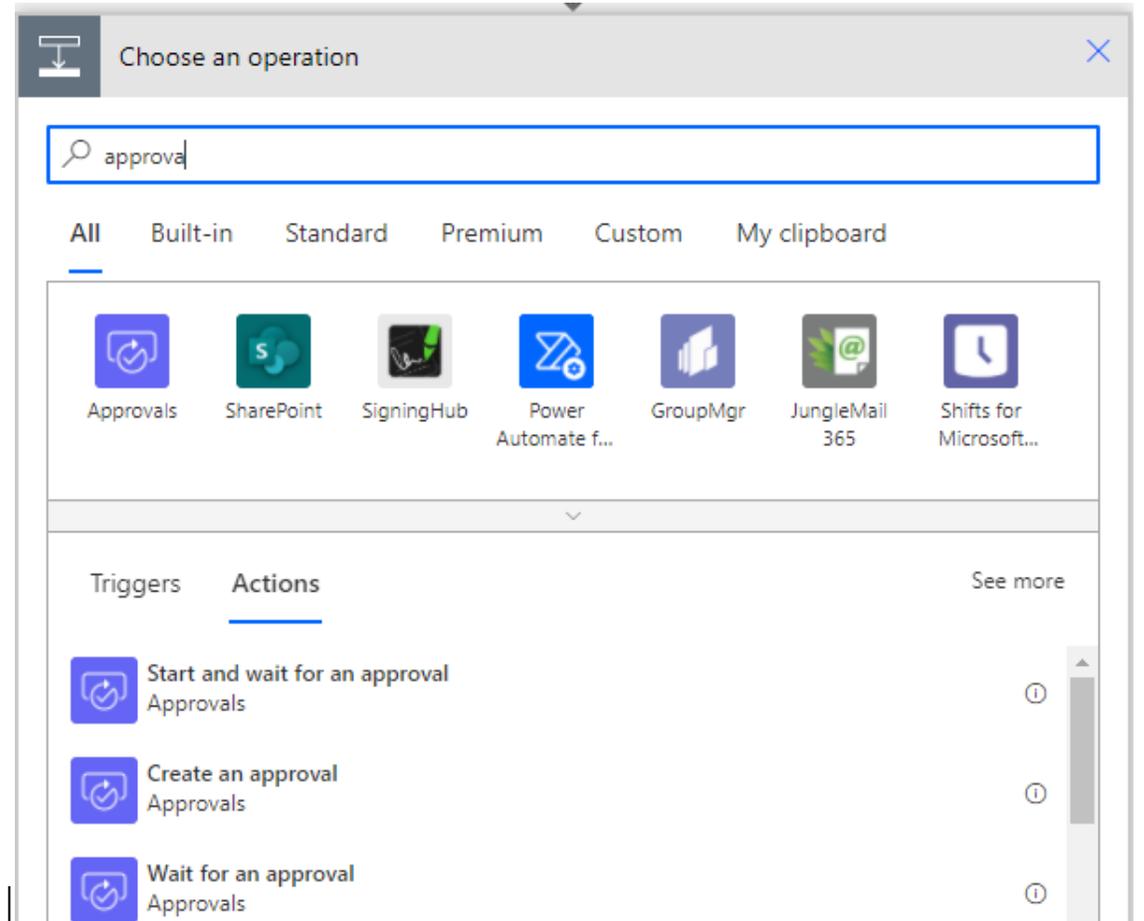
The step will require the File identifier from the When a file is created step and the link type of Edit and link scope of Organization (so anyone in the organization with the link will be able to edit the file).

The screenshot shows the configuration for the 'Create share link' action. The 'File' field is set to 'File identifier', 'Link type' is 'Edit', and 'Link scope' is 'Organization'. A dynamic content panel is open on the right, showing a list of available fields for the 'When a file is created' trigger, with 'File identifier' selected.

Dynamic content	Expression
Size	The file or folder size in bytes.
Is folder?	A boolean value (true, false) to indicate whether or not th...
File identifier	The unique identifier of the file or folder.
File name	The name of the file or folder.
File path	The path of the file or folder.
File entity tag	The etag of the file or folder.
File content type	The content type of the file or folder.
File content	The content of the file.

# Adding an approval process

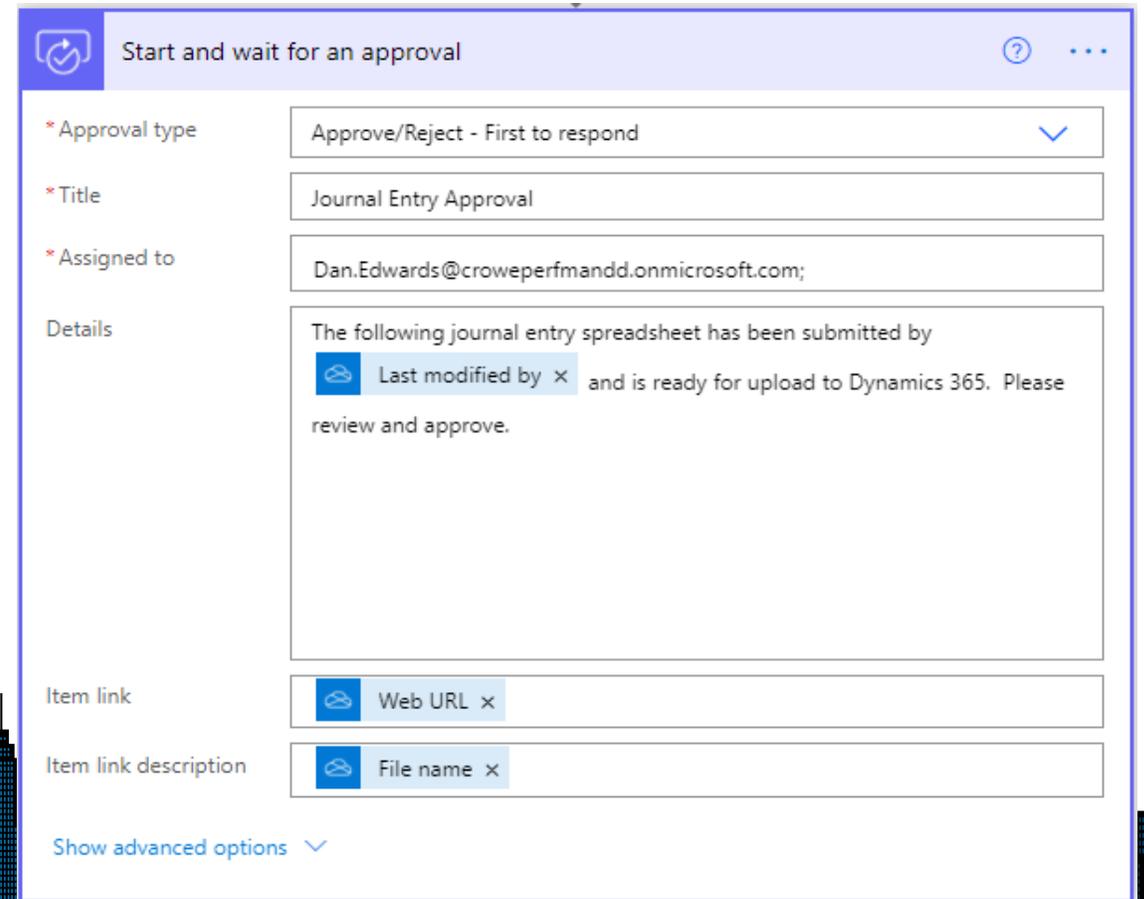
At times, the requirements ask for an approval process on the file before it is loaded into Dynamics 365 Finance. This process is optional, but it will add another level of control on the file before it is imported into Dynamics 365 Finance. Power Automate offers a few different options for Approvals. This example will use the Start and wait for an approval with Approve/Reject – First to respond.



# Enter details for the approval

With the approval step, it is necessary to give a title as well as identify the approver. This example will hard code the approver to one person. With Power Automate, it would be possible to use the Office 365 connector to get the manager for the user that created the Excel spreadsheet, assuming the user profiles are completed properly.

In the details section, a message can be included with directions. This can include fields like the user that modified the spreadsheet. Since a file share was created above, the Web URL can be added at the item link along with the item link description.



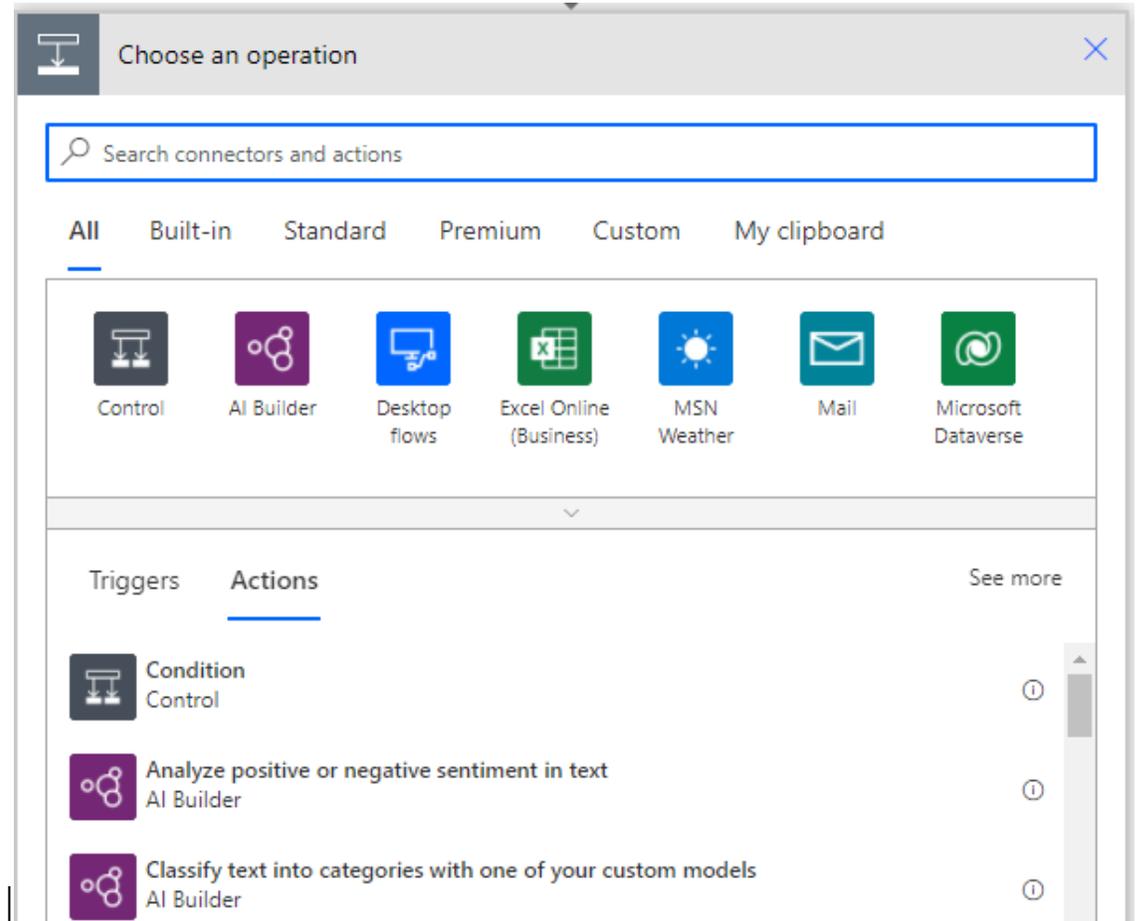
The screenshot shows the configuration for the 'Start and wait for an approval' step. The fields are as follows:

- \* Approval type:** Approve/Reject - First to respond
- \* Title:** Journal Entry Approval
- \* Assigned to:** Dan.Edwards@crowepermandd.onmicrosoft.com;
- Details:** The following journal entry spreadsheet has been submitted by  Last modified by  and is ready for upload to Dynamics 365. Please review and approve.
- Item link:**  Web URL 
- Item link description:**  File name 

At the bottom, there is a 'Show advanced options' dropdown menu.

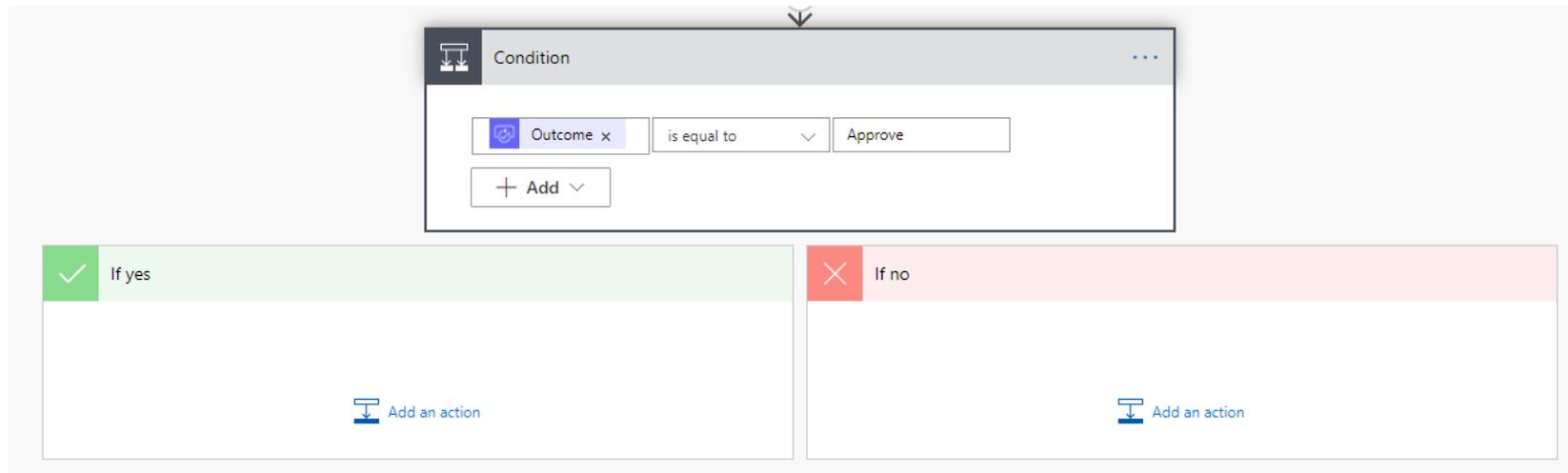
# Set a condition for the response

Now that the approval is created, the flow needs to take two different paths depending on whether the transactions are approved or rejected. This is done by creating a condition step. This is simply if approved go to branch one, or if rejected go to branch two.



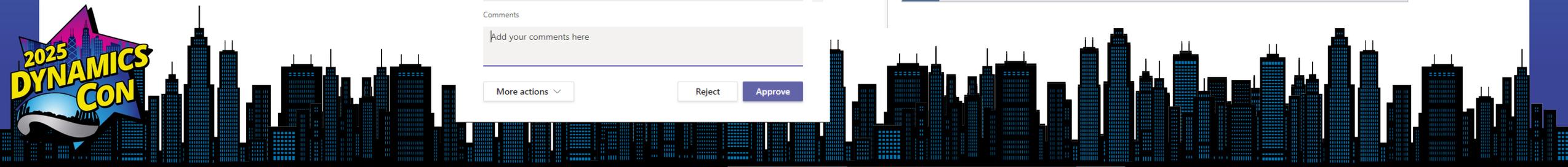
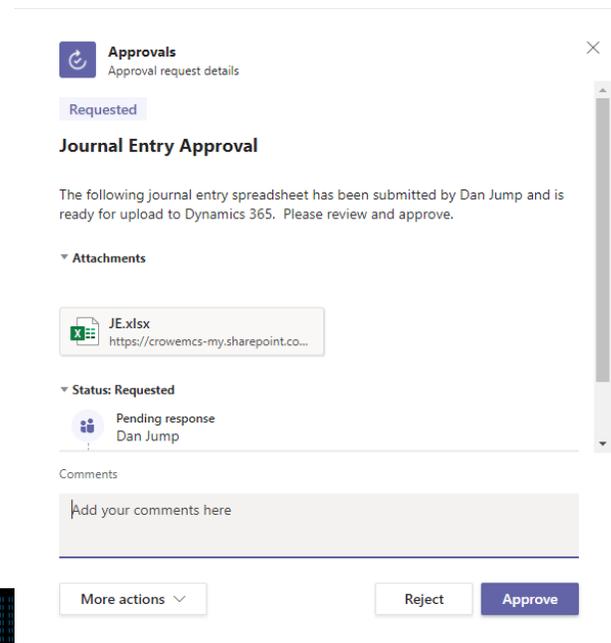
# Adding a condition

Adding the condition will create two branches automatically. If yes and If no. In this example, the condition will test if the result is equal to Approve, so the Yes side will import into Dynamics 365, and the No side will move the file to the Rejected folder.



# If approved

This branch will read the spreadsheet, import the Journal Header and Journal Lines, send an email to the originator and move the file to the approved folder.



# Create a copy of the imported file

Since the file is imported, it should be copied to the imported folder in OneDrive using the Create Imported File action from OneDrive for Business

Create file

\* Folder Path: /Journal Entries/Imported

\* File Name: Last modified by × Last modified t... × File name ×

\* File Content: File content ×

Simply select the Folder Path to store the imported file.

Recommendation is to add the username and date of the file to the file name, so the imported file name is unique. Select the File Content from the original file.

OneDrive

Search

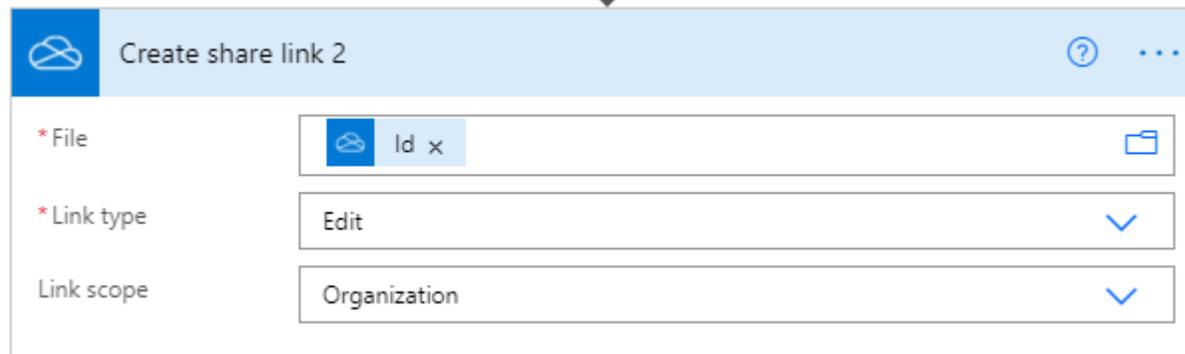
+ New Upload Share Copy link Sync Download Automate

My files > Journal Entries > Imported

Name	Modified	Modified By	File size	Sharing
2022-02-02T20_10_22.5298709ZJE.xlsx	February 2	Dan Jump	28.9 KB	Shared
2022-03-15T14_55_46.2338854ZJE.xlsx	March 15	Dan Jump	28.8 KB	Shared
2022-03-15T18_00_01.4025898ZJE.xlsx	March 15	Dan Jump	28.9 KB	Shared
2022-03-15T19_23_35.0955597ZJE.xlsx	March 15	Dan Jump	28.9 KB	Shared

# Create link to imported file

Like creating the share link for the original file, it is necessary to create a share link for the imported file so the original user can view the file if desired.



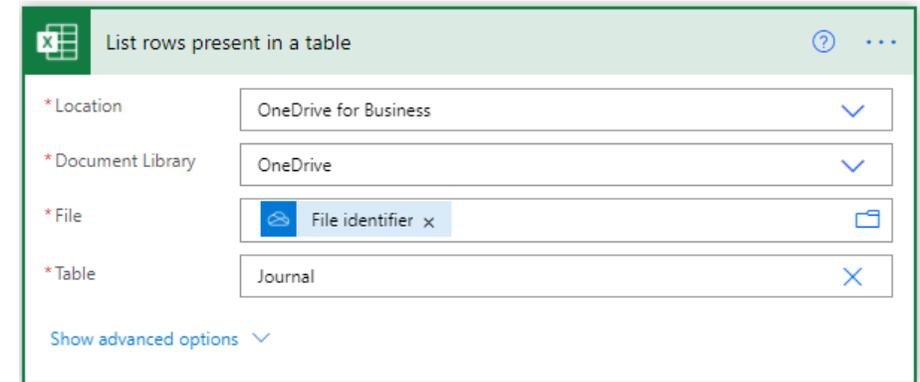
Field	Value
* File	Id x
* Link type	Edit
Link scope	Organization

The Id is from the Create file step prior



# Read the Excel Table

Prior to importing the journal entry, Power Automate needs to get the rows from the Excel table. This is done by using the Action - List rows present in a table from the Excel connector.

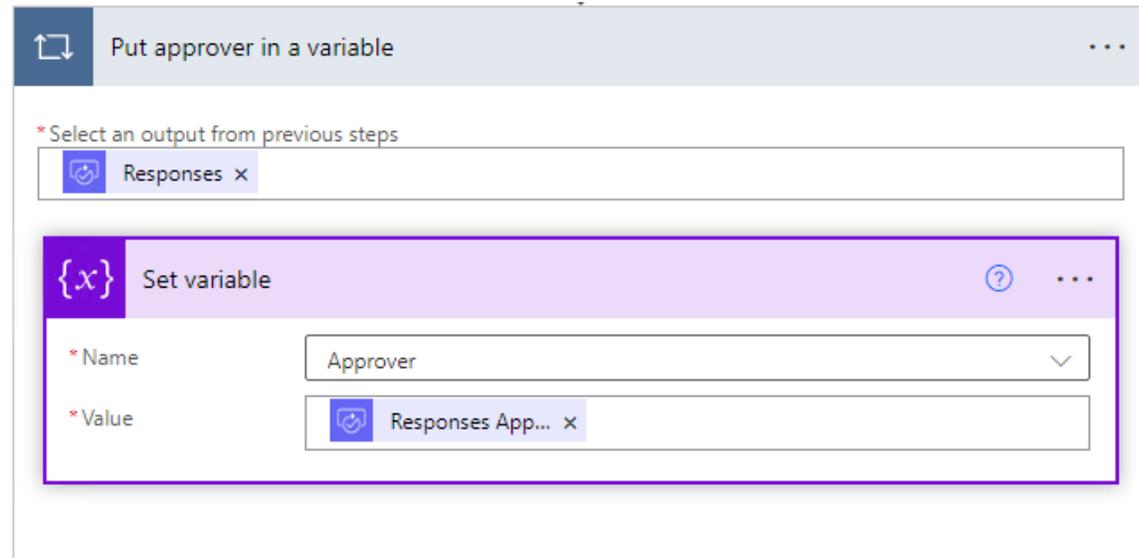


The connector will require the location and document library of the Excel file. In this case, the file is stored in OneDrive for Business, so the Location is OneDrive for Business and the Document Library is OneDrive. The file name is the File identifier that comes from the initial step of the flow, and since the template has a predefined table with the name of Journal, it will be entered as a custom value for the table name.



# Store the approver name

Since Power Automate can allow for multiple approvers, it is necessary to use a variable to store our final approver, so it can be written back to D365.



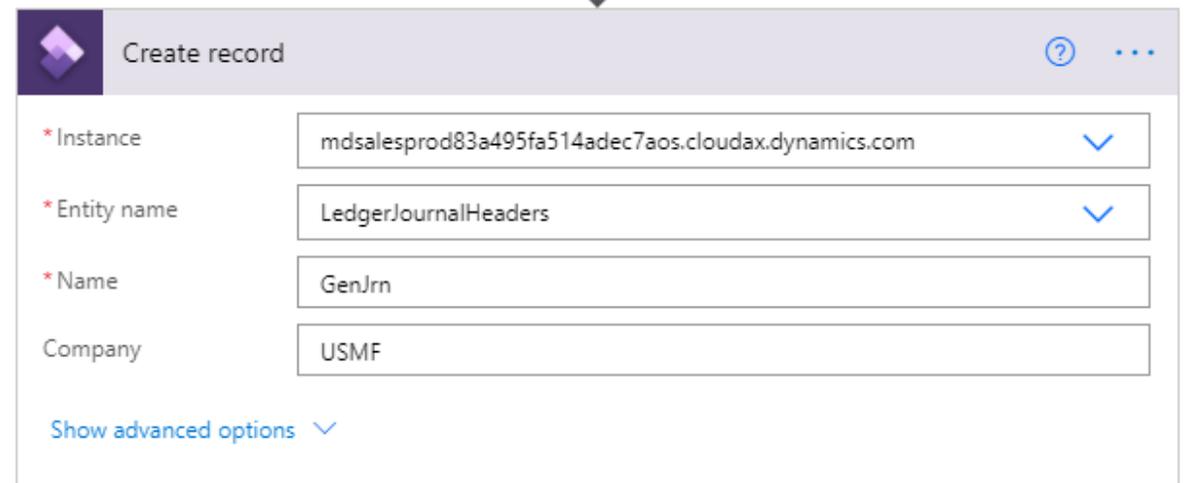
The screenshot shows a Power Automate step titled "Put approver in a variable". The step is configured as follows:

- Select an output from previous steps:** A dropdown menu showing "Responses x".
- Set variable:** A purple action card with the following configuration:
  - Name:** A dropdown menu showing "Approver".
  - Value:** A dropdown menu showing "Responses App... x".

# Create header record in D365

The first step for creating the Journal Entry in Dynamics 365 Finance is to create the Journal Entry header record. This will be done with the Create Record action from the Fin & Ops Apps connector.

- The Create Record will need the Dynamics 365 instance name and the entity to create the Journal Header is LedgerJournalHeaders.
- If the Journal Name and Company are in the Excel template they can be selected from the fields, otherwise they can be entered directly in the connector.



The screenshot shows a 'Create record' dialog box with the following fields:

Field	Value
* Instance	mdsalesprod83a495fa514adec7aos.cloudax.dynamics.com
* Entity name	LedgerJournalHeaders
* Name	GenJrn
Company	USMF

At the bottom, there is a link for 'Show advanced options'.



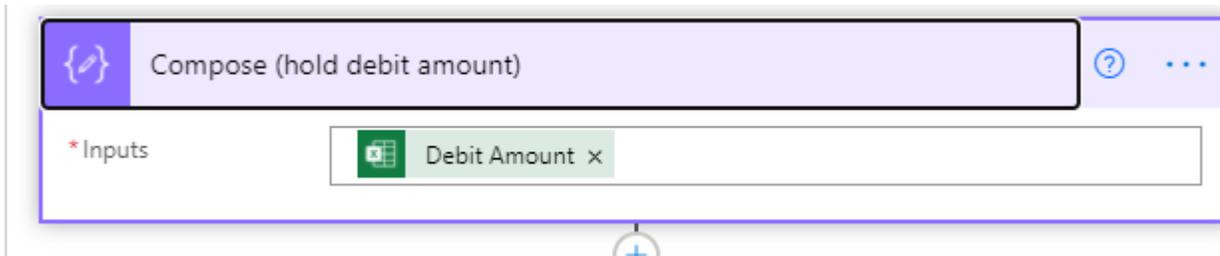
# Clean up the dollar amounts

Prior to importing the amounts into Dynamics 365 Finance, it is mandatory to convert the amount into acceptable decimal values. This will need to be done for both the Debit and Credit. This will be done using Data Operations in Power Automate. For each value it is a two-step process. Step one is selecting the value and step two is converting it to float. This also needs to be done for each row in the table. So, it is necessary to add a loop to the process. This is the Apply to each control.



# Clean up the dollar amounts

Now that the loop is in place, it is necessary to convert the Debit Amount and Credit Amount to floating decimal place. The first step is to identify the field from the spreadsheet. This is done with the Compose data operation.



*Note: to rename the function simply select the three dots and choose rename.*



# Clean up the dollar amounts

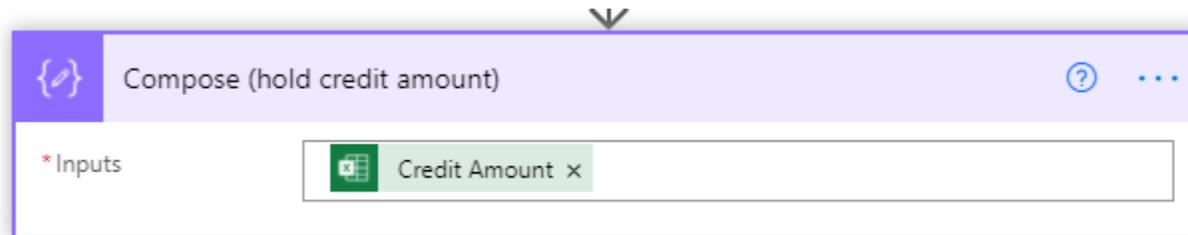
Then with a second compose function, enter an expression to convert to floating decimal.

The screenshot shows a software interface for configuring a compose function. The main window is titled "Compose (Convert line amount to float)". It features an "Inputs" section with a field containing "float(...)" and an "Add dynamic content" button. Below this is an "Add an action" button. A right-hand panel shows the "Expression" tab with the formula `float(outputs('Compose_(hold_debit_amount)'))` and an "Update" button. The panel also includes "String functions" and a "See more" link.

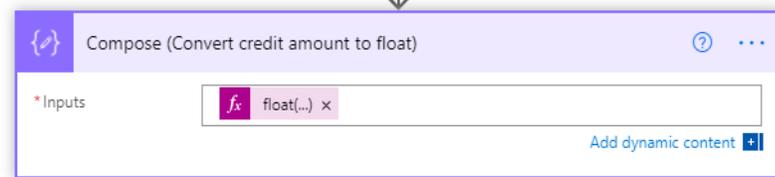
Formula: `float(outputs('Compose_(hold_debit_amount)'))`

# Clean up the dollar amounts

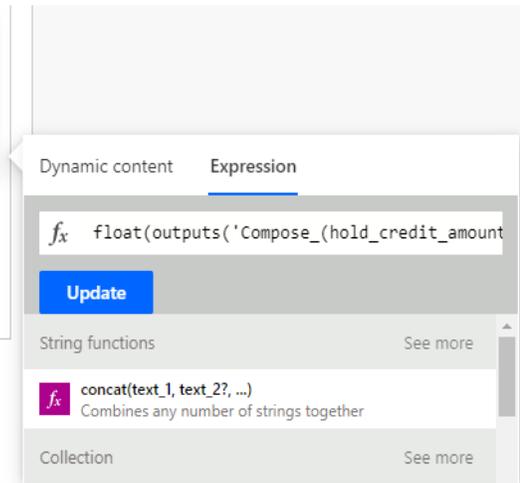
Repeat the steps for the Credit Amount



A screenshot of a workflow step titled "Compose (hold credit amount)". The step has a purple header with a code icon on the left and a help icon and menu icon on the right. Below the header, there is an "Inputs" section with a single input field containing a green icon and the text "Credit Amount x".



A screenshot of a workflow step titled "Compose (Convert credit amount to float)". The step has a purple header with a code icon on the left and a help icon and menu icon on the right. Below the header, there is an "Inputs" section with a single input field containing a pink icon and the text "float(...) x". To the right of the input field is a blue link that says "Add dynamic content" with a plus icon.



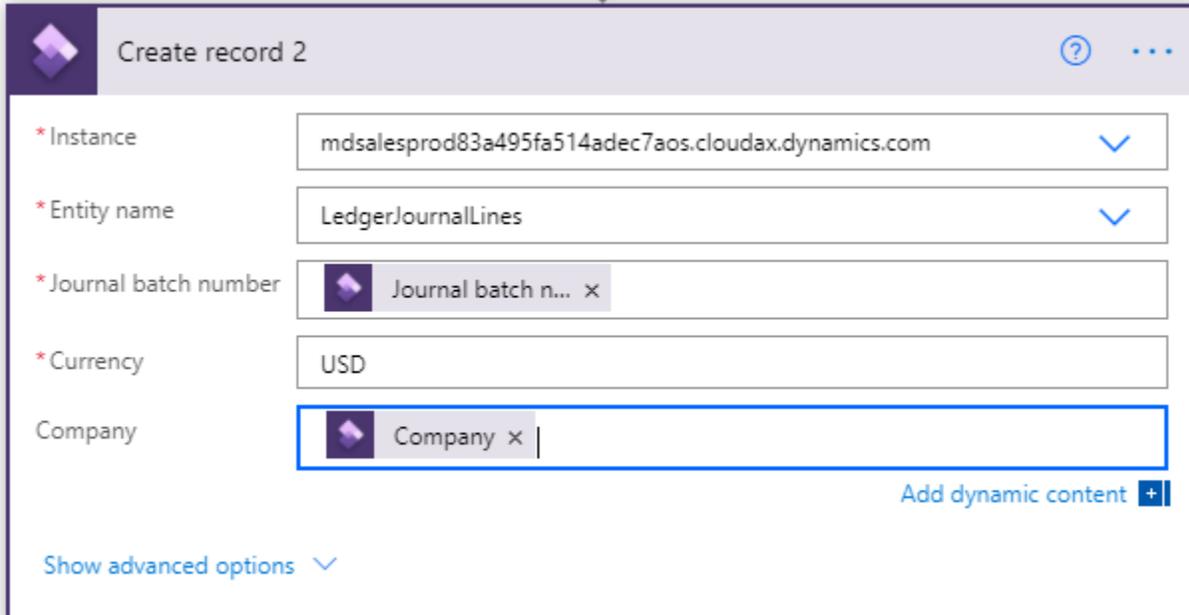
A screenshot of the "Dynamic content" panel. The "Expression" tab is selected. The formula entered is `float(outputs('Compose_(hold_credit_amount`. Below the formula is a blue "Update" button. Underneath, there are sections for "String functions" (with a "See more" link), "Collection" (with a "See more" link), and a "concat(text\_1, text\_2?, ...)" function description.

Formula: `float(outputs('Compose_(hold_credit_amount')))`

# Create line records in D365

Now that the header record is created and the amounts are set to floating decimal, Power Automate can load the line records from the Excel table into the Journal Lines. This will also use the Create Record action from the Fin & Ops Apps connector. The only difference is it will use the LedgerJournalLines entity.

- Select the Journal batch number and Company from the previous Create record step. Currency might come from the Excel spreadsheet, or it can simply be hard coded.
- Make sure to select Show advanced options, in order to map the Description, Date, Debit, Account and Credit. There might be other fields from the spreadsheet to map, but these are the key fields to create a valid journal entry.



The screenshot shows a 'Create record 2' dialog box with the following fields:

- Instance:** mdsalesprod83a495fa514adec7aos.cloudax.dynamics.com
- Entity name:** LedgerJournalLines
- Journal batch number:** Journal batch n... x
- Currency:** USD
- Company:** Company x |

At the bottom, there is a 'Show advanced options' checkbox which is checked, and an 'Add dynamic content' button with a plus sign.

# Data is loaded in D365

Finance and Operations USMF

Search for a page

Save Post Post in batch Validate General Journals Period journal Functions Fixed assets Inquiries Print Options

Journal voucher | 01043 : GENJRN

Standard view

Display journal lines: All

List General Invoice Payment Payment fee Fixed assets Remittance History

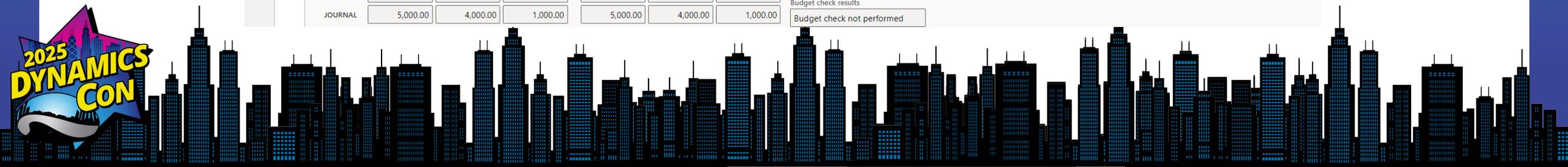
+ New Delete Voucher Financial dimensions Sales tax Functions Deferrals

Date	Voucher	Deferred	Company	Account type	Account	Description	Debit	Credit	Offset company	Offset account type	Offset account
4/7/2022	GNJL003044		USMF	Ledger	600155-001-022-0...	Dynamics Bootca...	3,500.00		USMF	Ledger	
4/7/2022	GNJL003044		USMF	Ledger	601600-001-024--	Dynamics Bootcamp		3,500.00	USMF	Ledger	
4/7/2022	GNJL003045		USMF	Ledger	601600-002-024--	Dynamics Bootcamp	1,200.00		USMF	Ledger	
4/7/2022	GNJL003045		USMF	Ledger	601600-002-022--	Dynamics Bootcamp	300.00		USMF	Ledger	
4/7/2022	GNJL003045		USMF	Ledger	601600-001-023--	Dynamics Bootcamp		150.00	USMF	Ledger	
4/7/2022	GNJL003045		USMF	Ledger	600155-001-022-013-	Dynamics Bootcamp		150.00	USMF	Ledger	
4/7/2022	GNJL003045		USMF	Ledger	600155-001-023-014-	Dynamics Bootcamp		200.00	USMF	Ledger	

Account name: Bankcard Fees    Offset account name:    Calculated sales tax amount: 0.00    Actual sales tax amount: 0.00

VOUCHER	CURRENCY			REPORTING CURRENCY		
	DEBIT	CREDIT	BALANCE	DEBIT	CREDIT	BALANCE
3,500.00	3,500.00	0.00	3,500.00	3,500.00	0.00	
JOURNAL	5,000.00	4,000.00	1,000.00	5,000.00	4,000.00	1,000.00

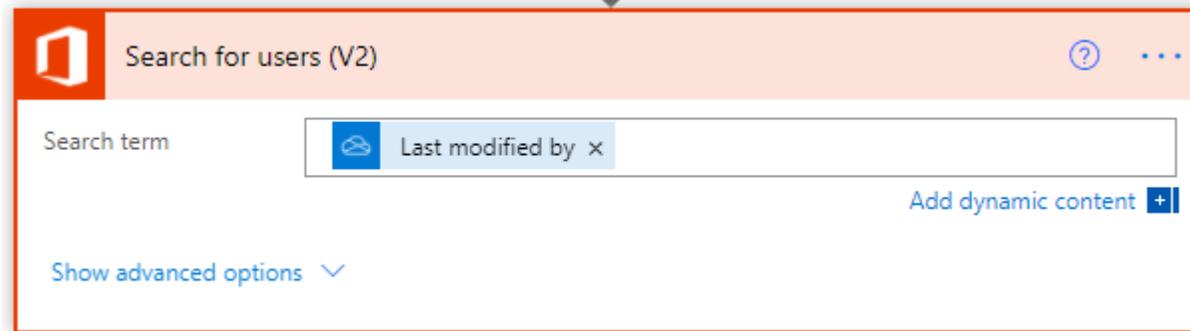
Budget check results: Budget check not performed



# Let the originator know

Now that the file is rejected and copied to the rejected folder, it is good practice to send an email to the originator, so they can make necessary adjustments.

First it is necessary to get the originator's email address. To do this, Power Automate can look up the user info using the Search for users (V2)



Make sure the Last modified by is from the Get Metadata step on the original file.

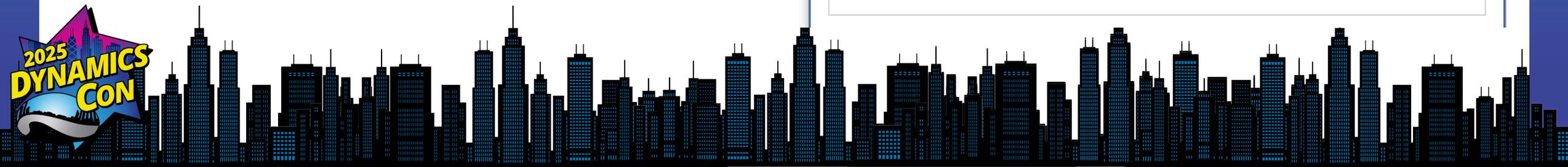
# Send an email

Now that you have found the user, it is possible to send the user an email with the Send an email (V2) action.

Power Automate will automatically create the Apply to each loop as there could have been more than one user returned when the user was looked up.

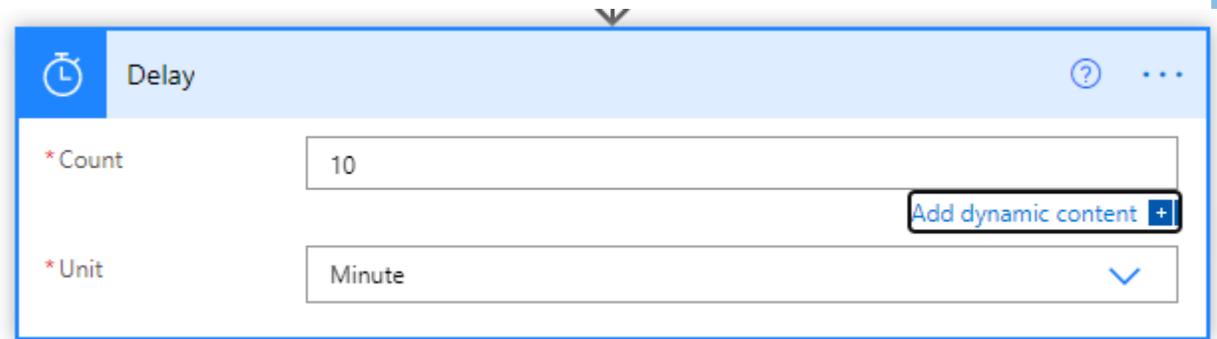
Select the Email from the User Record that was looked up. Then enter the information for the subject and body of the email. It is possible to include the file name as well as the journal batch number if desired.

The screenshot shows the configuration for the 'Send an email (V2)' action within an 'Apply to each 2' loop. The 'To' field is set to 'Email'. The 'Subject' field contains the text 'Your journal entry File name x has been approved and imported'. The 'Body' field is a rich text editor containing the following text: 'Your journal entry spreadsheet has been approved and imported into Dynamics 365 as a GenJrI # Journal batch number x'. Below this, it says 'The file has been moved to the imported folder and you can view it by clicking on the following link:' followed by two fields: 'Web URL x' and 'Name x'. At the bottom right of the configuration area, there is a link 'Add dynamic content +'. At the bottom left, there is a link 'Show advanced options v'.



# Delete the original file

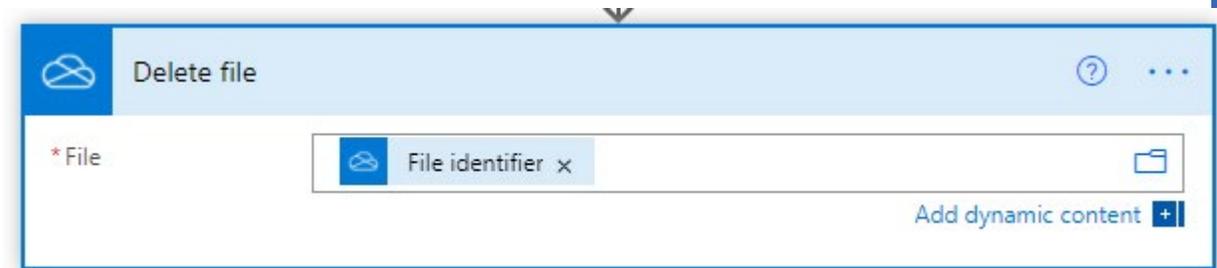
The last step is to delete the original file from the folder. There is currently an issue with Power Automate keeping the file locked for a time after reading the file, so it is necessary to Delay the delete step. This can be done, by entering a Delay action. A ten-minute delay has appeared to work.



The screenshot shows the configuration for a 'Delay' action. The 'Count' field is set to 10, and the 'Unit' is set to 'Minute'. There is an 'Add dynamic content' button next to the Count field.

Field	Value
*Count	10
*Unit	Minute

After the delay, the last step is the Action Delete file from OneDrive for Business using the File identifier from the original file creation.



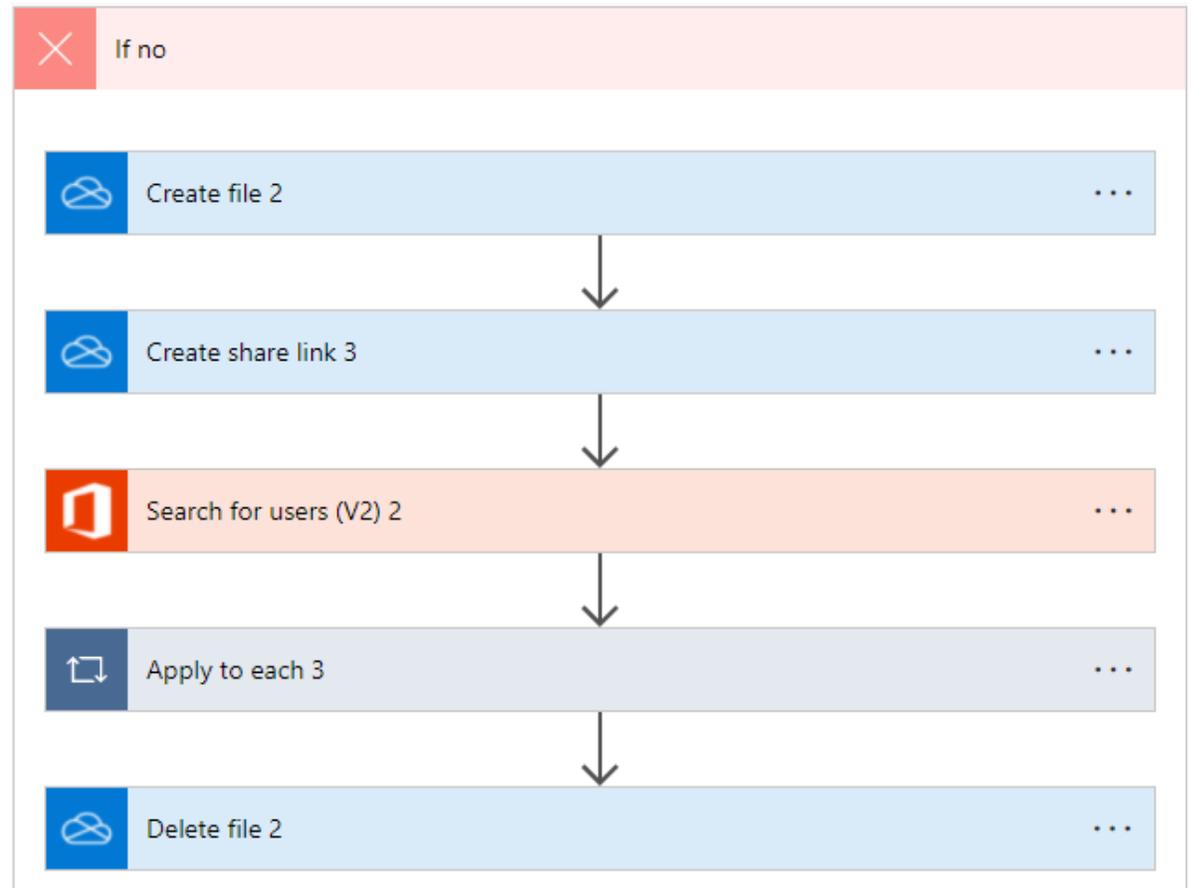
The screenshot shows the configuration for a 'Delete file' action. The 'File' field contains a 'File identifier' with a close button (x) and a folder icon. There is an 'Add dynamic content' button next to the File field.

Field	Value
*File	File identifier x



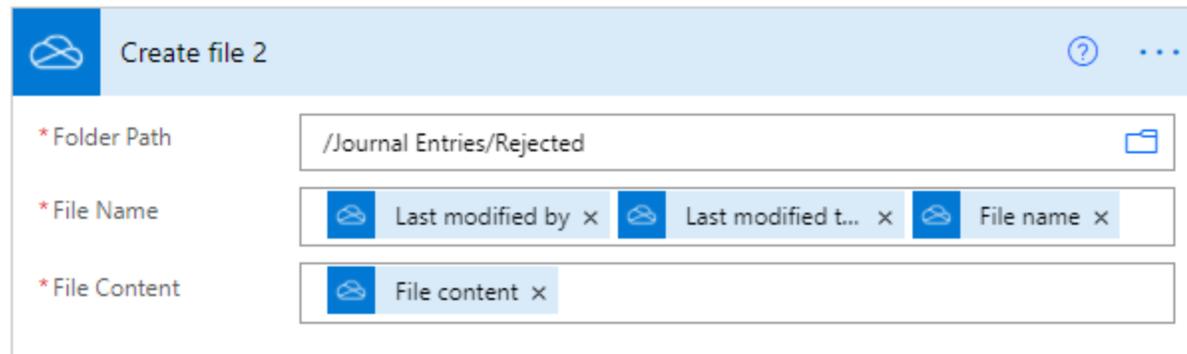
# If rejected

This branch sends an email to the originator and moves the file to the rejected folder. This is very similar to the steps used at the end of the approval section.



# Create a copy of the rejected file

Since the file is rejected, it should be copied to the rejected folder in OneDrive using the Create Imported File action from OneDrive for Business



The screenshot shows a dialog box titled "Create file 2" with the following fields:

- \* Folder Path: /Journal Entries/Rejected
- \* File Name: Last modified by x Last modified t... x File name x
- \* File Content: File content x

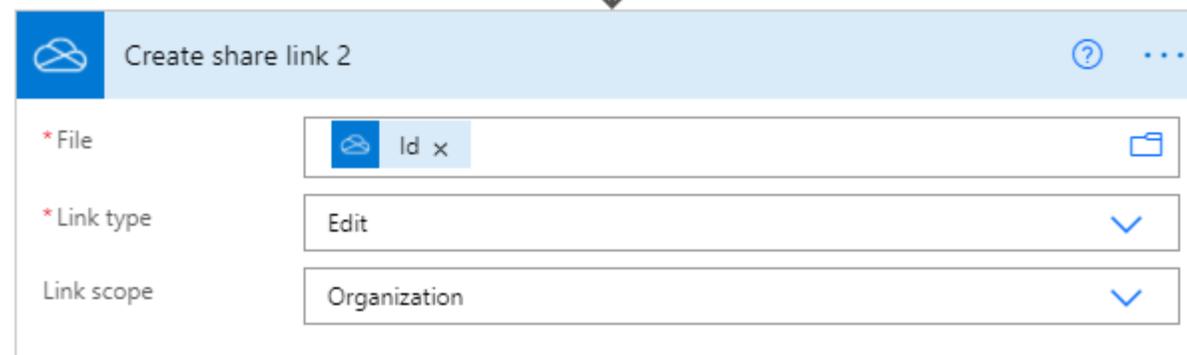
Simply select the Folder Path to store the rejected file.

Recommendation is to add the username and date of the file to the file name, so the imported file name is unique. Select the File Content from the original file.



# Create link to rejected file

Like creating the share link for the original file, it is necessary to create a share link for the rejected file so the original user can view the file if desired.



▼

Create share link 2

\* File

\* Link type

Link scope

The Id is from the Create file step prior



# Demonstration



# Power Automate Desktop

Can someone review my reports?



# Power Automate Desktop example

**Scenario** –Automate the reconciliation of AR with the GL by using the AR aging report and Customer to Ledger reports and updating year-end closing checklist.

[Use RPA with Dynamics 365 Finance - Power Automate | Microsoft Learn](#)



# Power Automate Desktop

The screenshot displays the Power Automate Desktop interface for a workflow titled "Report Validation | Power Automate". The interface is divided into several sections:

- Actions:** A left-hand sidebar with a search bar and a list of action categories including Variables, Conditionals, Loops, Flow control, Run flow, System, Workstation, Scripting, File, Folder, Compression, UI automation, HTTP, Browser automation, Work queues (Preview), Excel, AI Builder, Database, Email, Exchange Server, Outlook, Message boxes, Mouse and keyboard, Clipboard, and Text. A "See more actions" link is at the bottom.
- Main Canvas:** A central workspace showing a sequence of actions:
  - On block error
  - Go to web page (Navigate to FNOFullURL)
  - Wait 5 seconds
  - Open Customer Aging Report form
  - If web page contains (If UI element Modules Menu doesn't exist on web page)
    - Click link on web page (Click on Expand left module pane of web page)
  - End
  - Click link on web page (Click on Modules Menu of web page)
  - Click link on web page (Click on Credit And Collections Link of web page)
  - Click link on web page (Click on Expand All Link of web page)
  - Go to web page (Navigate to FNOWebsiteURL '?cmp=' FNOCompanyName '&mi=Output"%3ACustAgingBalance')
  - Fill in Customer Aging Report Form
  - Populate text field on web page (Populate text field Aging Report Data Input with AgingAsOfDate without using simulated typing)
- Variables:** A right-hand pane showing two groups of variables:
  - Input / output variables (11):** Includes AgingAsOfDate (09/02/2023), AreBalancesIn..., BalanceAsOfDate (09/02/2023), ErrorMessage, FinancePeriod... (09/02/2023), FNOCompany... (USMF), and FNOCompanyName.
  - Flow variables (20):** Includes AmountCusto..., AmountCusto..., AmountLedge..., Browser, CustomerAgin..., and CustomerAgin...

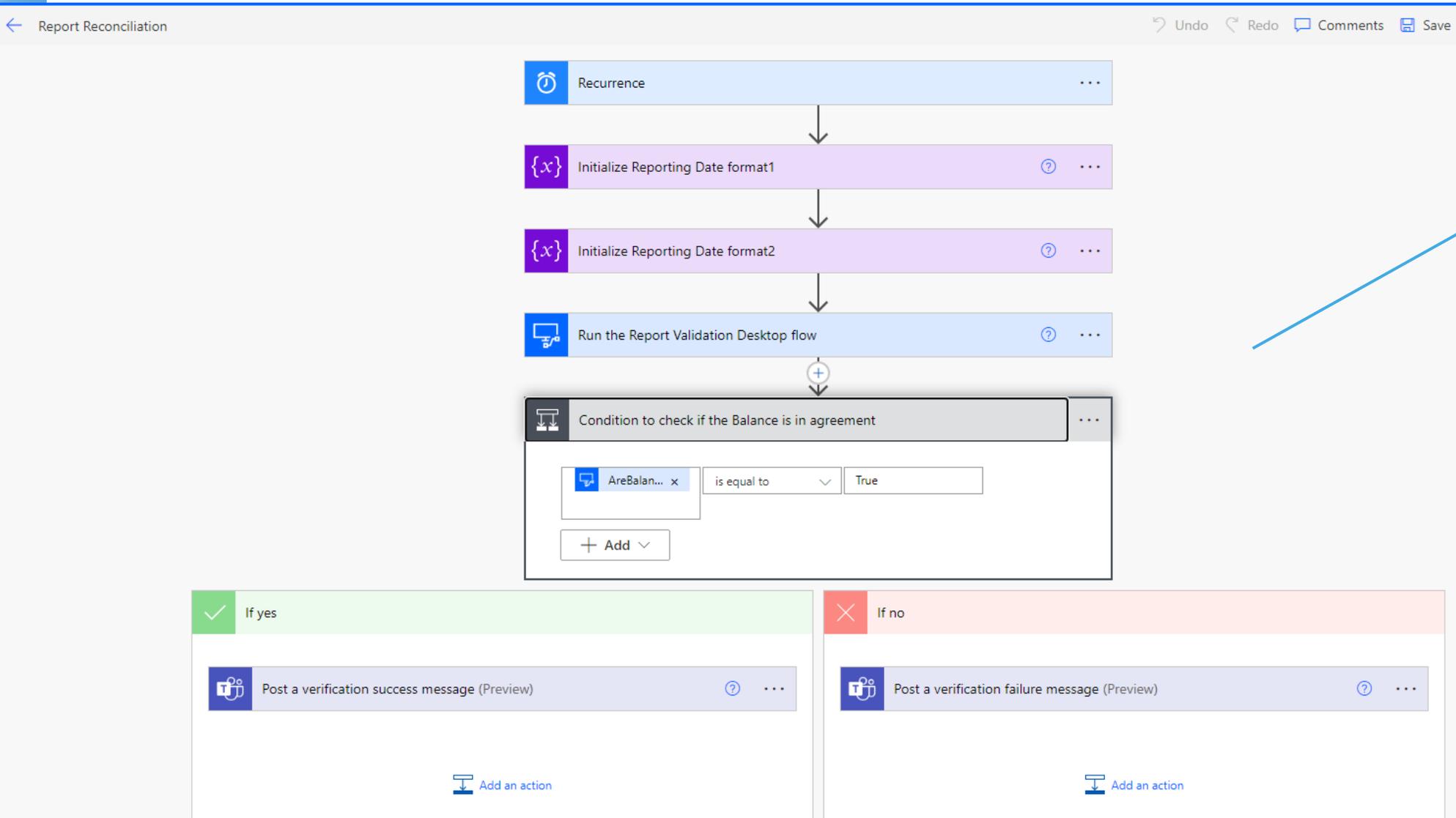
The status bar at the bottom indicates "Status: Ready", "0 Selected actions", "39 Actions", "7 Subflows", and "Run delay: 100 ms".

Power Automate Desktop can control the input of the machine, run & read reports and save data

Input/Output variables can be used to adjust the automation



# Run with Power Automate



A cloud flow can be used to schedule the Power Automate desktop flow and deliver results



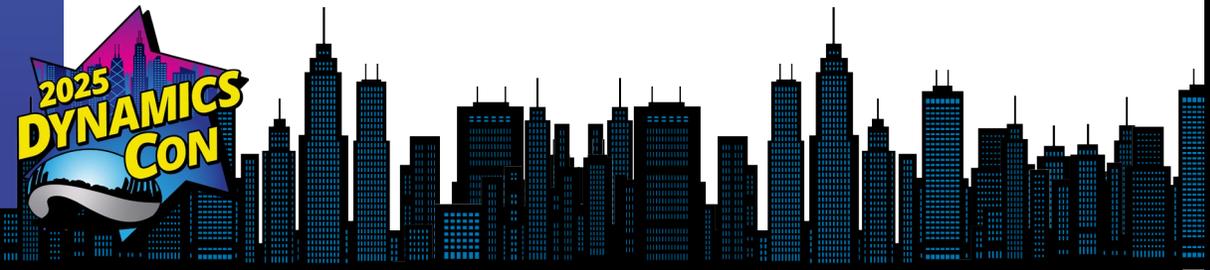


# Results

OneDrive - Crowe MCS Presales > AR Reconciliations

Name	Status	Date modified	Type	Size
customeraging09062023	✓	9/6/2023 11:27 PM	Microsoft Excel W...	51 KB
customeraging09132023	✓	9/13/2023 3:31 PM	Microsoft Excel W...	51 KB
customertoledgerrec09062023	✓	9/6/2023 11:26 PM	Microsoft Excel W...	11 KB
customertoledgerrec09132023	✓	9/13/2023 3:29 PM	Microsoft Excel W...	11 KB

The screenshot shows a Microsoft Teams chat window. At the top, there is a search bar and a user profile picture. Below the search bar, the chat title is "General" with tabs for "Posts", "Files", "Notes", "P&L Report", and "1 more". There are three buttons: "Add more people", "Create more channels", and "Open the FAQ". A message from "Dan User Account" is shown, dated "3:31 PM". The message text is: "Automation has finished verifying the customer and ledger balances of the Customer Balance/Ledger Reconciliation and Customer Aging reports successfully for this company: USMF. Please check your AR Reconciliations folder for copies of the reports." Below the message, it says "- Created by Power Automate" and "See less". There is a "Reply" button at the bottom of the message. At the bottom of the chat window, there is a "New conversation" button.



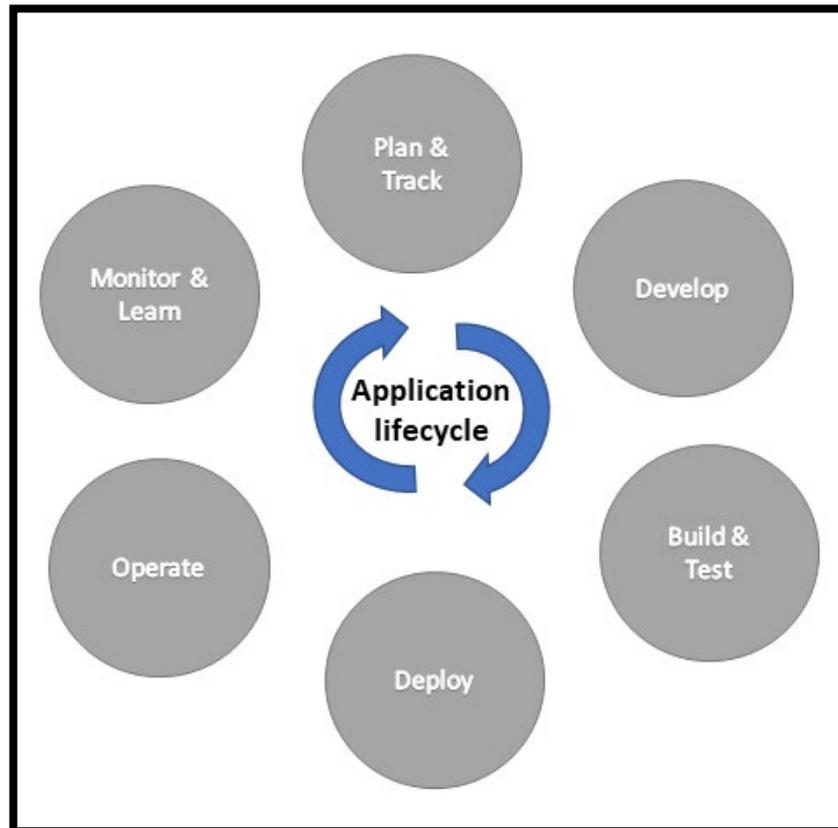
# Power Platform Application Lifecycle Management

Avoiding the chaos



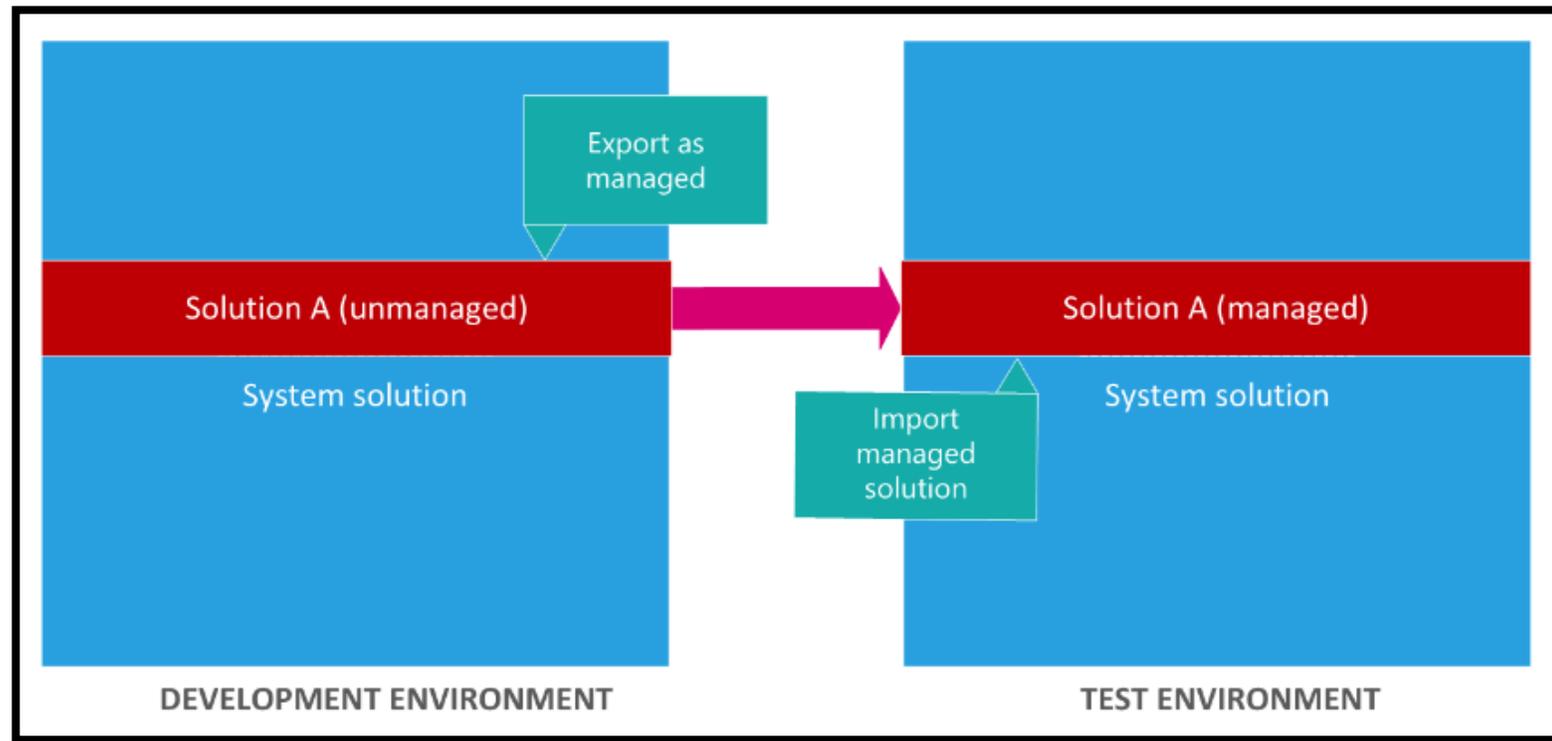
# Power Platform ALM

How do you deploy Power Platform apps and components to other environments



# Solutions

Solutions are a way to transport apps, components, and cloud flows between environments



# Create a solution

The screenshot shows the Power Apps interface with the 'New solution' dialog box open. The dialog is titled 'New solution' and contains the following fields and options:

- Display name \***: Summit Demo
- Name \***: SummitDemo
- Publisher \***: Summit Demo Publisher (SummitDe...)
- Version \***: 1.0.0.0
- More options** (dropdown)
- Create** button
- Cancel** button

The background shows a table of existing solutions with the following columns: Display name, Name, Created, Version, Managed, and Publisher.

Display name	Name	Created	Version	Managed	Publisher
MasterPlanning Anchor Solution	msdyn_MasterPlanni...	1 week ago	1.0.0.35	Yes	Default Publisher for...
MasterPlanningServicePermissions_PROD	msdyn_MasterPlanni...	1 week ago	1.0.0.35	Yes	Default Publisher for...
MasterPlanning Solution	msdyn_MasterPlanni...	1 week ago	1.0.0.35	Yes	Default Publisher for...
Dynamics 365 Supply Chain Traceability ancho...	msdyn_SupplyChain...	1 week ago	1.1.0.44	Yes	Dynamics 365
Dynamics 365 Supply Chain Traceability portal ...	msdyn_SCTPortal	1 week ago	1.1.0.44	Yes	Dynamics 365
Dynamics 365 Supply Chain Traceability contro...	msdyn_SCTControls	1 week ago	1.1.0.44	Yes	Dynamics 365
Dynamics 365 Supply Chain Traceability comm...	msdyn_SupplyChain...	1 week ago	1.1.0.44	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Anchor	msdyn_InventorySer...	1 week ago	1.2.2.49	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Application	msdyn_InventorySer...	1 week ago	1.2.2.49	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Controls	msdyn_InventorySer...	1 week ago	1.2.2.49	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Plugins	msdyn_InventoryVisi...	1 week ago	1.2.2.49	Yes	Dynamics 365
KB Suggestions AI Core	msdyn_KBSuggestio...	1 week ago	1.1.22101.4	Yes	Dynamics 365
CCA KB AI Solution	msdyn_CcaKbAISolu...	1 week ago	1.1.22101.4	Yes	Dynamics 365
Case Suggestions AI Core	msdyn_CaseSuggesti...	1 week ago	1.1.22101.4	Yes	Dynamics 365
CCA Case AI Solution	msdyn_CcaCaseAISo...	1 week ago	1.1.22101.4	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Base	msdyn_InventoryVisi...	1 week ago	1.2.2.49	Yes	Dynamics 365

# Add existing cloud flow to solution

The screenshot shows the Power Apps interface. At the top, there is a search bar and a navigation bar with '+ New', 'Add existing', and 'Publish all customizations'. The 'Add existing' dropdown menu is open, listing various object types. The 'Automation' category is expanded, and 'Cloud flow' is highlighted with a red box. A red arrow points from the 'Add existing' header to the 'Cloud flow' option. The background shows a list of objects with columns for 'Name' and 'Type', and a message: 'We didn't find anything to show here'.

Object Type	Name	Type
All (0)		
Apps (0)		
Cards (0)		
Chatbots (0)		
Cloud flows (0)		
Tables (0)		

Automation

- Cloud flow
- Custom connector
- Dataflow
- Desktop flow
- Dialog
- Process

# Add existing cloud flow to solution

**Add existing cloud flows**

Select cloud flows from other solutions or cloud flows that aren't in solutions yet. Adding cloud flows that aren't already in solutions will also add them to Dataverse.

5 cloud flows selected

Search cloud flows

From Dataverse    Outside Dataverse

Display name	Modified	Managed externally?	Status
<input checked="" type="checkbox"/> (1) - Complete Dynamics 365 for Finance and Operati...	1 wk ago	🔒	On
<input checked="" type="checkbox"/> (2) - New Vendor Form Submitted	2 wk ago	🔒	On
<input checked="" type="checkbox"/> (3) - Notify credit review due	2 wk ago	🔒	On
<input checked="" type="checkbox"/> (4) Import Journal Entry to D365 with Approval	2 wk ago	🔒	On
(vis) Email	2 d ago	🔒	On
(vis) OneDrive for Business	1 d ago	🔒	On
(vis) SharePoint	1 d ago	🔒	On
Daily Summary Email flow	2 wk ago	🔒	Off
Entity records distribution flow	2 wk ago	🔒	Off
IoT - Flow - Parent IoT Alerts	2 wk ago	🔒	Off
IoT - Flow - Schedule Device Data Pulls	2 wk ago	🔒	Off
Load Batting Stats	2 wk ago	🔒	On
QOrder - CloudFlow Monitor Queue	1 wk ago	🔒	On
<input checked="" type="checkbox"/> Report Reconciliation	1 wk ago	🔒	On
Retry Failed Duplicate Detection Runs	2 wk ago	🔒	Off

**Add**    Cancel



# Add existing cloud flow to solution

The screenshot displays the Power Apps environment interface. At the top, the 'Power Apps' header is visible on the left, and 'Environment Finance' is shown on the right. A search bar is located in the top center. Below the header, the 'Objects' pane on the left lists various object types: All (5), Apps (0), Cards (0), Chatbots (0), Cloud flows (5), and Tables (0). The main area shows a list of cloud flows under the heading 'Summit Demo > All'. The list includes columns for Display name, Name, Type, Managed, Last Modified, Owner, and Status.

Display name ↑	Name ↓	Type ↓	Managed ↓	Last Modif... ↓	Owner ↓	Status
(1) - Complete Dynamics 365 for Finance and ...	(1) - Complete Dynamics 365 for Finance and Operatio...	Cloud Flow	No	1 week ago	Dan Edwards	On
(2) - New Vendor Form Submitted	(2) - New Vendor Form Submitted	Cloud Flow	No	2 weeks ago	Dan Edwards	On
(3) - Notify credit review due	(3) - Notify credit review due	Cloud Flow	No	2 weeks ago	Dan Edwards	On
(4) Import Journal Entry to D365 with Approval	(4) Import Journal Entry to D365 with Approval	Cloud Flow	No	2 weeks ago	Dan Edwards	On
Report Reconciliation	Report Reconciliation	Cloud Flow	No	1 week ago	Dan Edwards	On



# Export solution for deployment

Power Apps

Search

Environ Finance

+ New solution Edit Delete **Export solution** Solution checker Show dependencies See history Clone Apply Upgrade Translations Settings

### Solutions

Solutions Publishers History

Display name	Name	Created	Version	Managed	Publisher
Summit Demo	SummitDemo	8 minutes ago	1.0.0.0	No	Summit Demo Publis...
MasterPlanning Anchor Solution	msdyn_MasterPlanni...	1 week ago	1.0.0.35	Yes	Default Publisher for...
MasterPlanningServicePermissions_PROD	msdyn_MasterPlanni...	1 week ago	1.0.0.35	Yes	Default Publisher for...
MasterPlanning Solution	msdyn_MasterPlanni...	1 week ago	1.0.0.35	Yes	Default Publisher for...
Dynamics 365 Supply Chain Traceability ancho...	msdyn_SupplyChain...	1 week ago	1.1.0.44	Yes	Dynamics 365
Dynamics 365 Supply Chain Traceability portal ...	msdyn_SCTPortal	1 week ago	1.1.0.44	Yes	Dynamics 365
Dynamics 365 Supply Chain Traceability contro...	msdyn_SCTControls	1 week ago	1.1.0.44	Yes	Dynamics 365
Dynamics 365 Supply Chain Traceability comm...	msdyn_SupplyChain...	1 week ago	1.1.0.44	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Anchor	msdyn_InventorySer...	1 week ago	1.2.2.49	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Application	msdyn_InventorySer...	1 week ago	1.2.2.49	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Controls	msdyn_InventorySer...	1 week ago	1.2.2.49	Yes	Dynamics 365
Dynamics 365 Inventory Visibility - Plugins	msdyn_InventoryVisi...	1 week ago	1.2.2.49	Yes	Dynamics 365
KB Suggestions AI Core	msdyn_KBSuggestio...	1 week ago	1.1.22101.4	Yes	Dynamics 365
CCA KB AI Solution	msdyn_CcaKbAISolu...	1 week ago	1.1.22101.4	Yes	Dynamics 365
Case Suggestions AI Core	msdyn_CaseSuggesti...	1 week ago	1.1.22101.4	Yes	Dynamics 365
CCA Case AI Solution	msdyn_CcaCaseAISo...	1 week ago	1.1.22101.4	Yes	Dynamics 365

### Export this solution

Version number\* ⓘ  
Current version 1.0.0.0  
1.0.0.1

Export as

Managed (recommended) ⓘ  
The solution is moving to a test or production environment. [Learn more](#)

Unmanaged  
The solution is moving to another development environment or source control. [Learn more](#)

Run solution checker on export

Export Cancel

# Import Solution

Power Apps

Search

+ New solution ← Import solution Open AppSource Publish all customizations

### Solutions

Solutions Publishers History

Display name	Name	Created	Version
Summit Demo	SummitDemo	11 minutes ago	1.0.0.0
MasterPlanning Anchor Solution	msdyn_MasterPlanni...	1 week ago	1.0.0.35
MasterPlanningServicePermissions_PROD	msdyn_MasterPlanni...	1 week ago	1.0.0.35
MasterPlanning Solution	msdyn_MasterPlanni...	1 week ago	1.0.0.35
Dynamics 365 Supply Chain Traceability ancho...	msdyn_SupplyChain...	1 week ago	1.1.0.44
Dynamics 365 Supply Chain Traceability portal ...	msdyn_SCTPortal	1 week ago	1.1.0.44
Dynamics 365 Supply Chain Traceability contro...	msdyn_SCTControls	1 week ago	1.1.0.44
Dynamics 365 Supply Chain Traceability comm...	msdyn_SupplyChain...	1 week ago	1.1.0.44
Dynamics 365 Inventory Visibility - Anchor	msdyn_InventorySer...	1 week ago	1.2.2.49
Dynamics 365 Inventory Visibility - Application	msdyn_InventorySer...	1 week ago	1.2.2.49
Dynamics 365 Inventory Visibility - Controls	msdyn_InventorySer...	1 week ago	1.2.2.49
Dynamics 365 Inventory Visibility - Plugins	msdyn_InventoryVisi...	1 week ago	1.2.2.49
KB Suggestions AI Core	msdyn_KBSuggestio...	1 week ago	1.1.22101.4
CCA KB AI Solution	msdyn_CcaKbAISolu...	1 week ago	1.1.22101.4
Case Suggestions AI Core	msdyn_CaseSuggesti...	1 week ago	1.1.22101.4
CCA Case AI Solution	msdyn_CcaCaseAISo...	1 week ago	1.1.22101.4

### Import a solution

Environment  
Finance

Select a file  
Browse for the solution file to import.

Browse No file chosen

### Try pipelines for effortless imports

Use pipelines to simplify and automate the deployment process in your organization. Pipelines is a feature of Managed Environments. [Learn more](#)

Next Cancel



# Summary



Power Automate is a Powerful Tool



These are just examples – look at recurring processes in your business to determine how you might use Power Automate



Be sure to test your automation in a sandbox prior to trying in production



# Suggested Resources

## Pricing & Licensing Detail

- <https://powerautomate.Microsoft.com/en-us/pricing/>
- <http://learn.microsoft.com/en-us/power-platform/admin/power-automate-licensing/faqs>



# Thank you for attending!!!

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- Power Automate examples
- Virtual Entity information
- Dual Write information
- Creating a date table in Power BI
- USERRELATIONSHIP in DAX
- An easy way to create backgrounds for Power BI
  - .....and more

