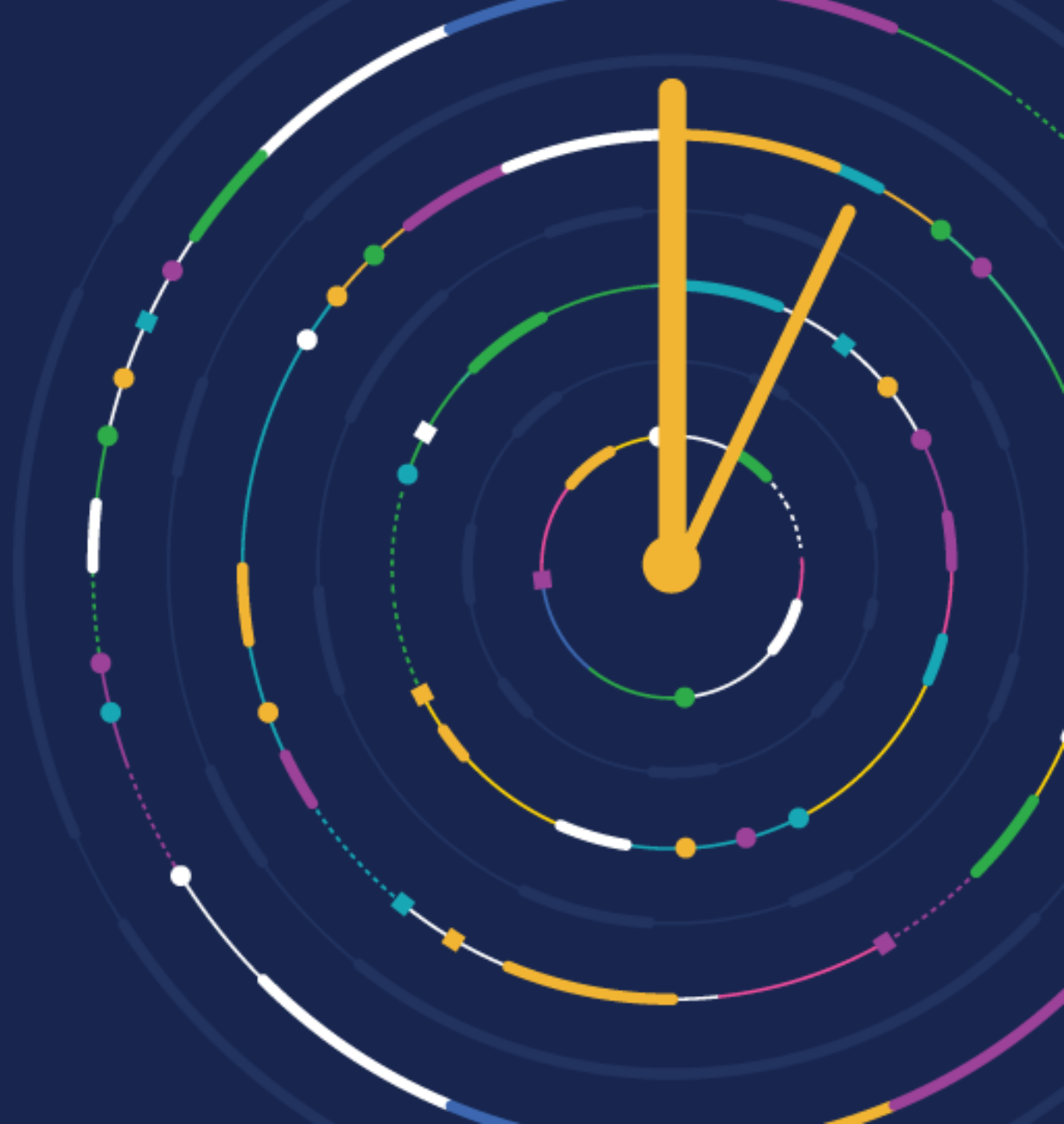




Power Automate for
Business Central - see
working examples of the
no/low code tool you can
finally understand

Kelly Wood & Jason Tromans

CUSTOMER DAY 2023





Power Automate Vs BC Workflows - A Short Recap

Power Automate

A workflow engine – system agnostic

Works by connecting via API

Standard connector for BC – some standard approval templates

No need for users to log into BC, can have an approvals process managed in Teams/Outlook/Dataverse

Power Automate can look to trigger a workflow with BC connector when:

- Record is changed
- Record is deleted
- Record is created
- Record is modified

Works with Business Events in Business Central

BC Workflow

When Event – this is what has happened / On Condition – filters must be met / Then response – what happens

When Event	On Condition	Then Response
Approval of a purchase document is requested.	Document Type: Order, Status: O.	(+) Add record restriction.
An approval request is approved.	Pending Approvals: 0	(+) Remove record restriction.
An approval request is rejected.	Pending Approvals: >0	Send approval request for the record and create a notification.
An approval request for a purchase document L...	= Always =	(+) Reject the approval request for the record and create a notification.
An approval request is delegated.	Document Type: Order, Status: P.	(+) Cancel the approval request for the record and create a notification.
	= Always =	Send approval request for the record and create a notification.

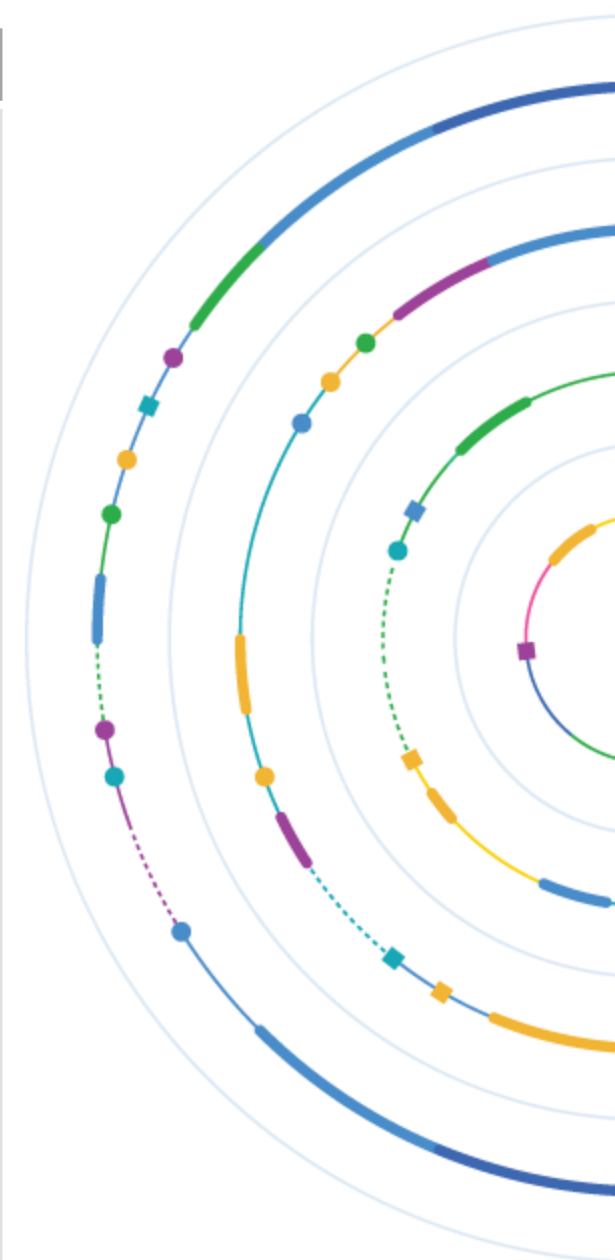
Commonly used for approvals, such as purchase and sales documents, and journals. Also, can help manage changes to items, vendors, customers.

Templates available within BC

Approvers must be within BC – and can only have 1 approver administrator

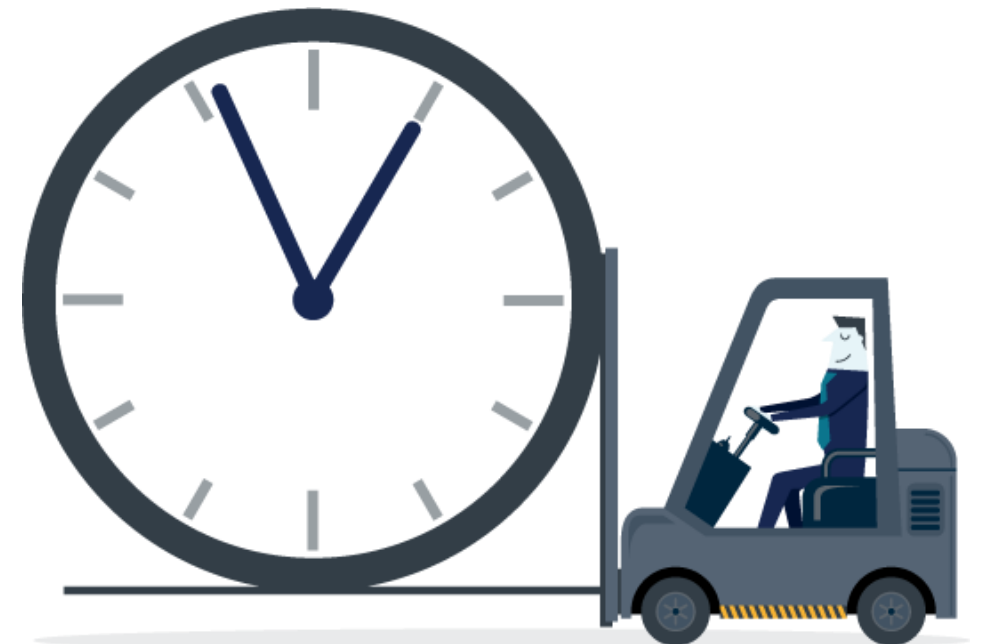
Approvals can be sent via email, and approvals can be seen via cue on role centre

Enhancing workflow/events would require a Business Central developer



Business Events in Business Central

- Business Events provide a mechanism for notifying and triggering external systems when actions are done on Business Central. External systems can react and perform other actions in response.
- Business events need to be on BC version 22.0 or above
- You need the – Ext. Events – Subscr permission set for users who want to use the function



Power Automate Use Cases

Approvals

- Customer
- Vendor
- Sales documents
- Purchase documents
- Journals
- Credit limits
- Item approvals (move from blocked)

Notifications

- Customer on block/stop
- Service Item Expiry (Warranty)
- Service Item Validation (from External Source)
- Work Order Completion
- Service Order Schedule
- Shipment Notification

Data Processing / Validation / Integration

- Incoming Order Data (eCommerce platform/Excel Sheet)
- Export item catalogue
- Sales Returns Request (with Power Pages)
- New Supplier Form (with Power Pages)
- New Customer Form (with Power Pages)
- CRM integration enhancements

Scenario 1 – Approvals

- Approval of purchase order



Scenario 2 - Notifications

- Shipment posted in Business Central notifies customer their order is on the way (via email/text)



Scenario 3 – Data Processing

- Send an email when a customer is blocked
- Companies House API – pull data through in to BC (talk about)

(Other scenario – pull back credit check information in to BC)



Other Scenarios – Open Discussion





QUESTIONS ?



THANK YOU

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