

# CRM connect

Our First CRM & PP User  
Forum – Power Automate

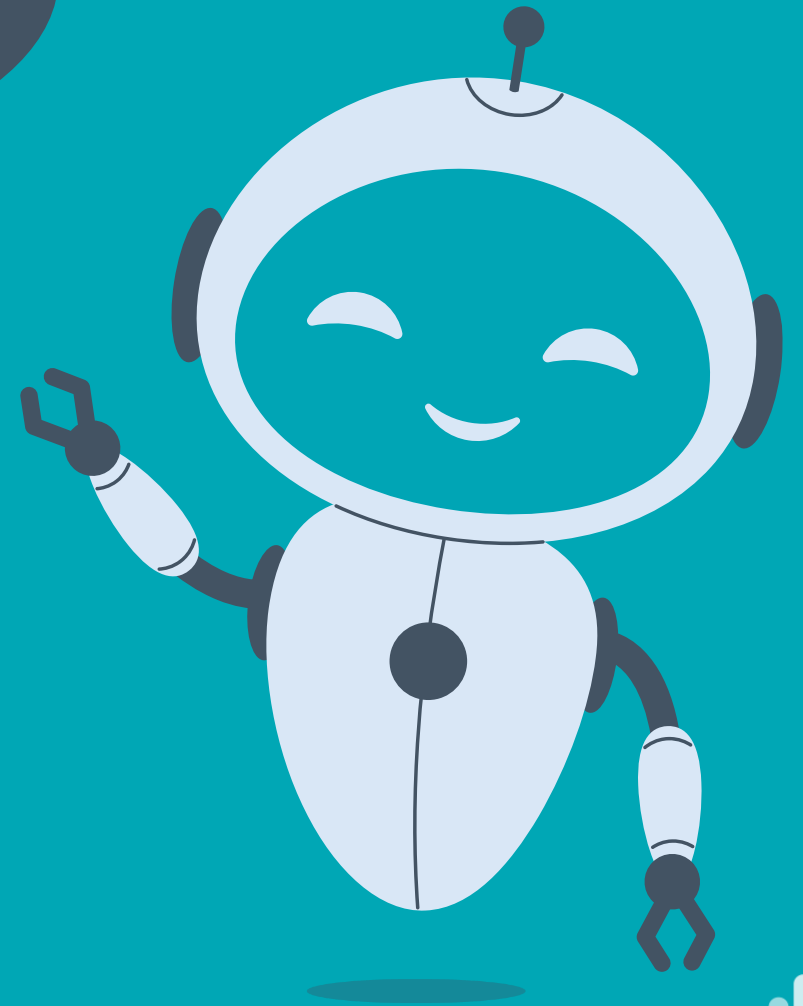


THURSDAY 15<sup>th</sup> MAY 2025



Hi!

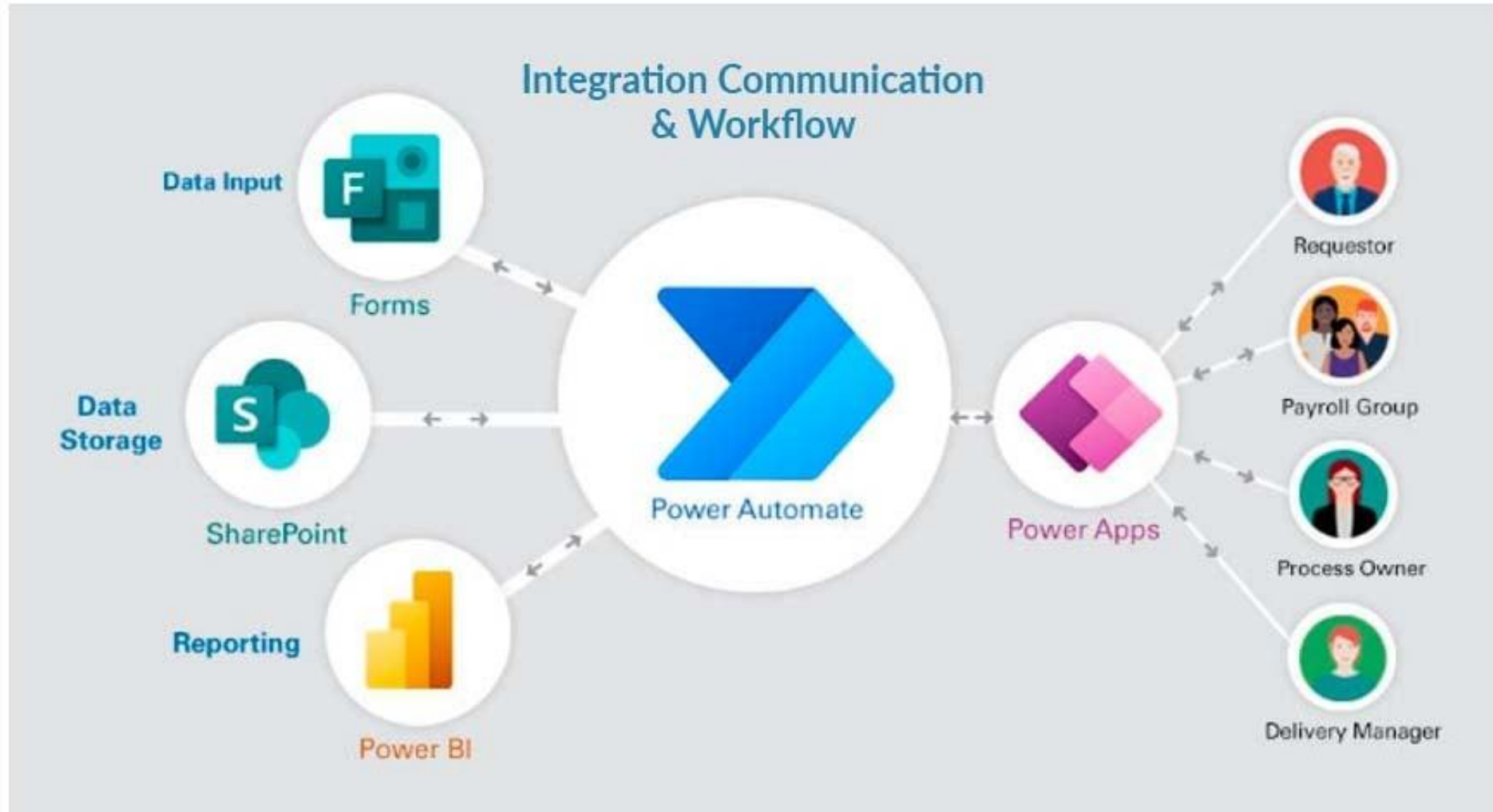
Ben & Jon



# What is a user forum?

- Today we are here to discuss Power Automate at a high-level
- Learning from others
- Discussing business case uses for Power Automate and any challenges you have faced.

# What is Power Automate?



# Hands up who has used Power Automate?





Let's discuss Power Automate use cases in your business.

# Examples of Power Automate Use Cases

- Automatic Record Creation Rules/Routing from Email
- Custom Business Central Integration where Standard Integration fall short..
- Notifications (Emails, Teams, In App, & Power Pages)
- Business Central Queue failures Emails
- Email notifications for failed flows. (flows reporting on flows!)
- Setting territories based on owner (within CRM) or setting owner based on Territory or setting Territory based on Postcode.
- Copilot Studio (to query company data)
- Approvals as part of the business process.
- Reoccurring reports sent by email/teams (Scheduled flows)
- Mass update of data
- Migration of data (although not recommended).
- Use in Canvas apps/Custom Page to connect to external sources (EPC Register/Companies House)
- Mapping information from Microsoft Forms submissions into CRM.
- Webhooks to map data to CRM from a website form.
- DocuSign Integration (moving signed document and notifying the user)
- Moving email attachments to SharePoint.





Let's discuss challenges you have  
faced with Power Automate?

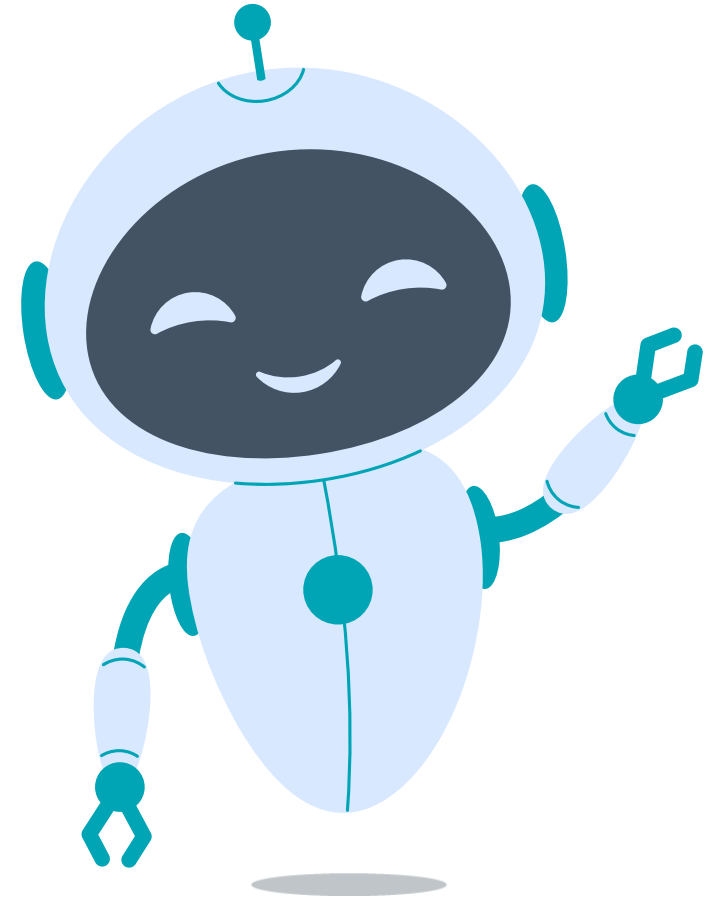




Let's discuss the positives and negatives  
of your experience

# Summary of our challenges with Power Automate

- Legacy interface and New interface (learning curve)
- Flow ownership is important – needs to be owned by a user with a licence.
  - Service Principle.
- Need to be licenced to use specific actions (Outlook is a good example)
- Flows turn off 'with no notification' if not owner by a licenced user.
- Flow administration is getting better but still room for improvement.
- Flow run asynchronously so end user has no idea if the flow has been successful or not. (No front-end output).
- Need to refresh CRM record to see flow changes.
- Limits - If being used to bulk update data (5000 records at once)
- Looping flows (Unknowingly being throttled by Microsoft when hitting number of API calls).
- No error capturing built in.
- Disconnect between the CRM record and Power Automate Run.



# Further considerations

The environment Flows sit in - don't use the default environment

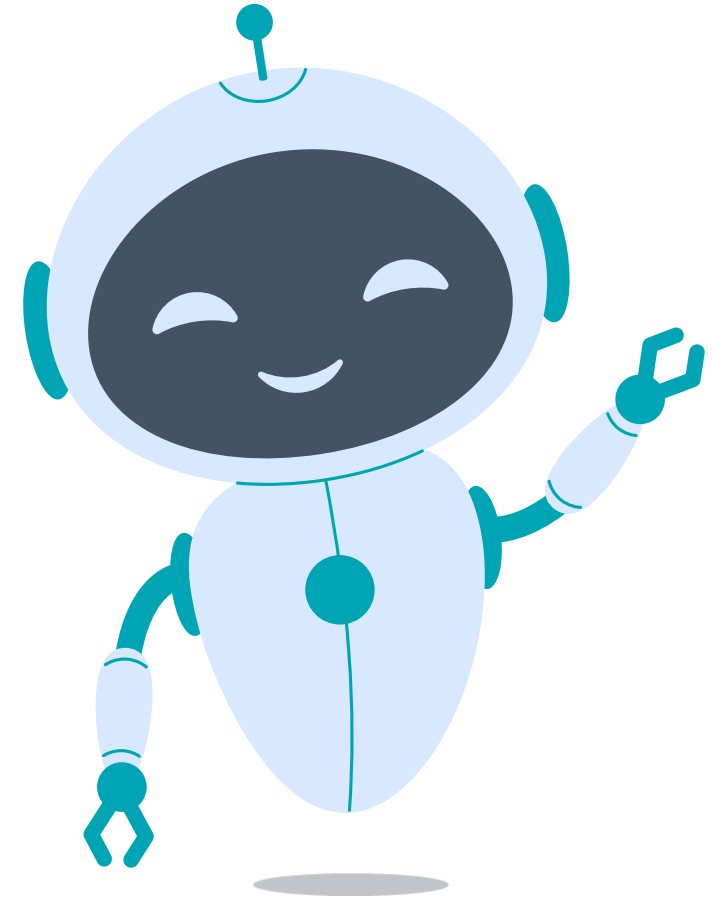
- Not as secure
- Limited control
- All users have access
- Can be used for personal productivity and learning but for anything used in production, put in dedicated environments

Flow scope

- All based on who owns the Flow
- Can have multiple Flows doing very similar things

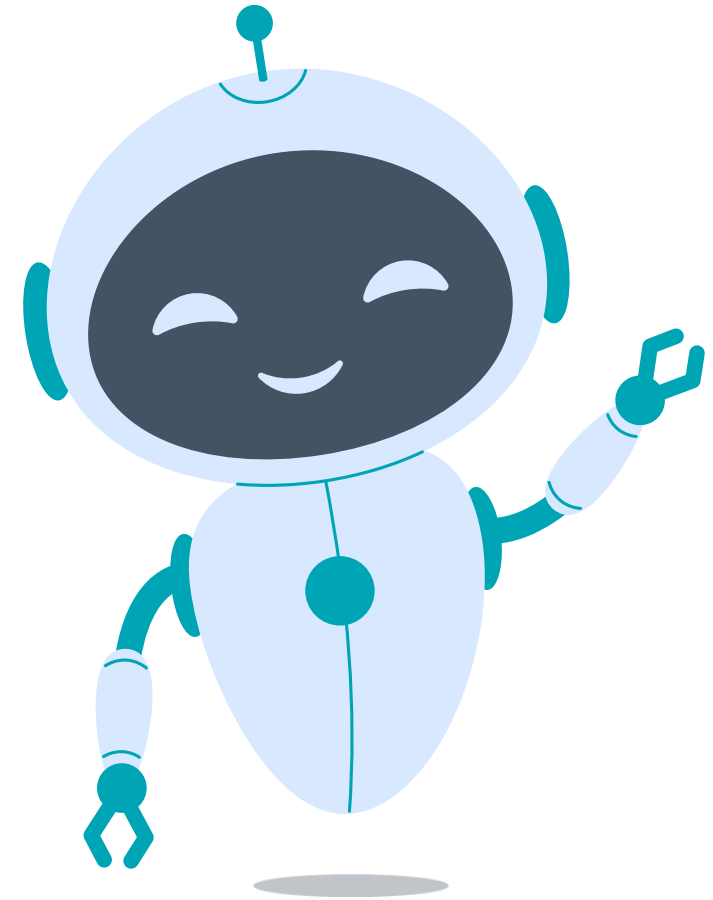
Data Loss Prevention (DLP) policies

- Make sure that users are aware of what they can and cannot do
- Break this down into the technologies - Power Automate, Copilot, etc
- In particular, anything that opens the system up to the outside world - be clear



# What if I get stuck?

- Tecman can help build Power Automate Flows
- Tecman can provide training on Power Automate
- Tecman can support Power Automate (T&M)



*Thank you!*



CRM

connect

THURSDAY 15<sup>th</sup> MAY 2025

