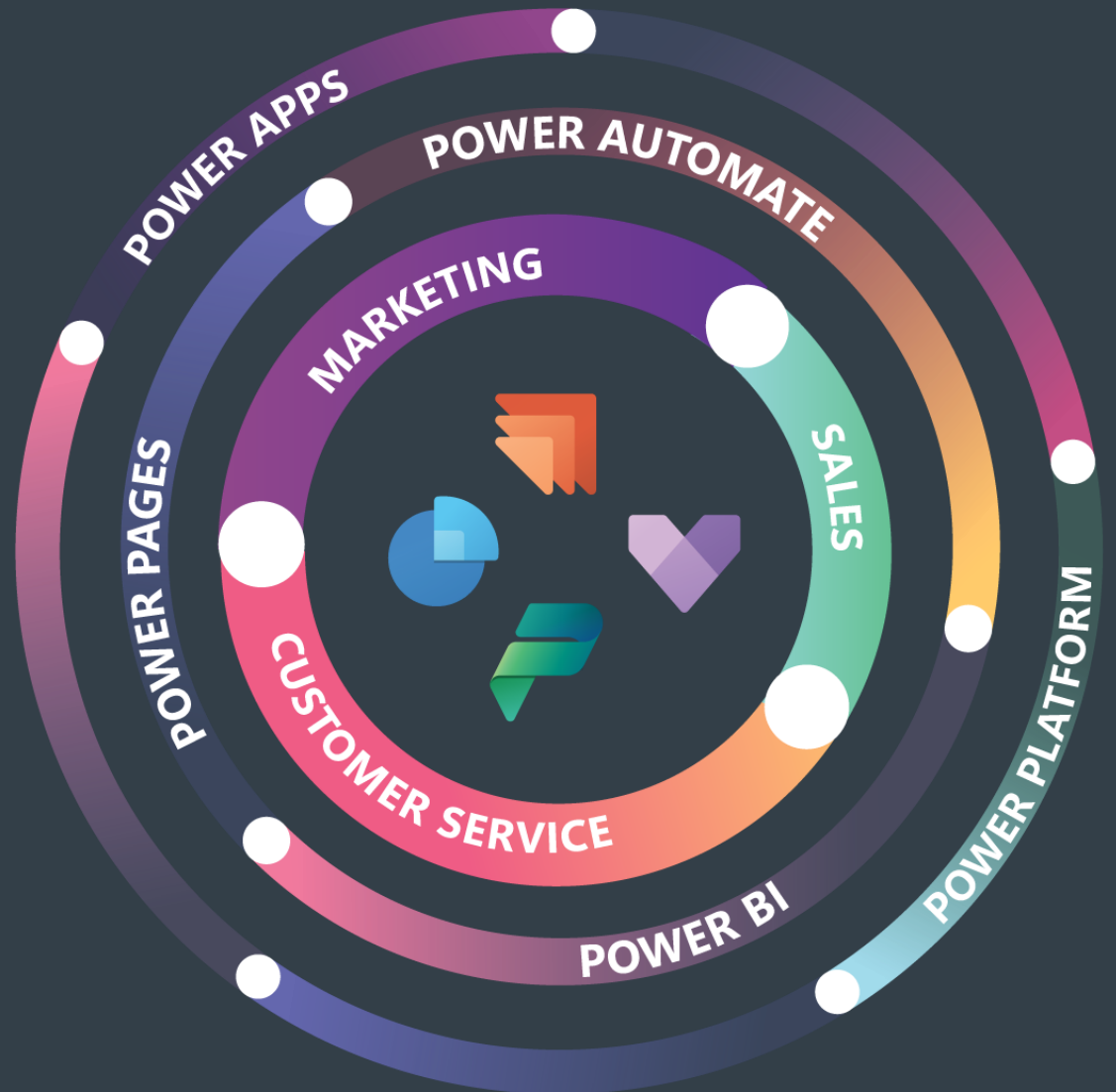


# CRM connect

Real-Life Inspiration for  
Power Automate and Your  
Business





Can you hear me?



Is everything clear?



~ 45 mins



Q & A



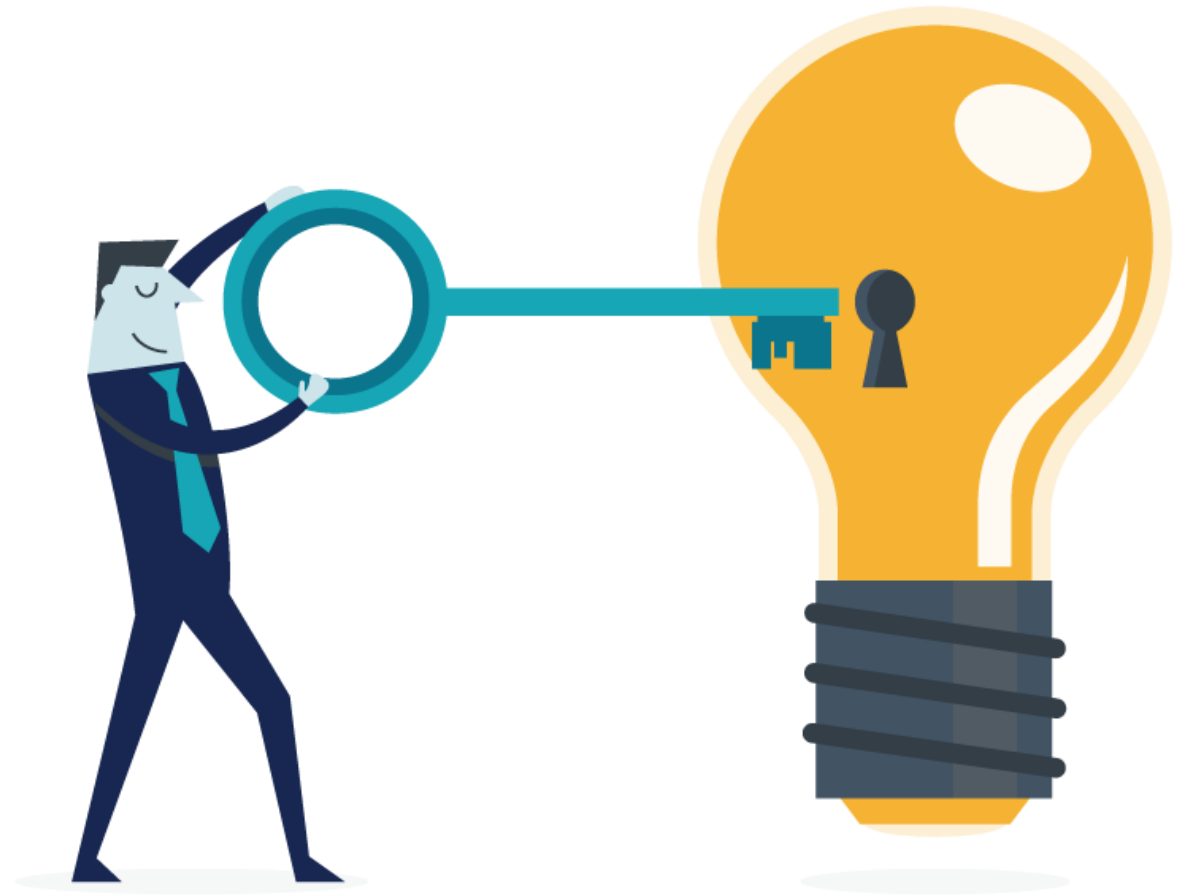
Hi!  
Ellie + Matt

# What we'll cover



## Power Automate

1. What is Power Automate?
2. Latest Features in Power Automate
3. Power Automate with Business Central ERP
4. Power Automate with Dynamics 365 CE
5. Q&A





# What is Power Automate



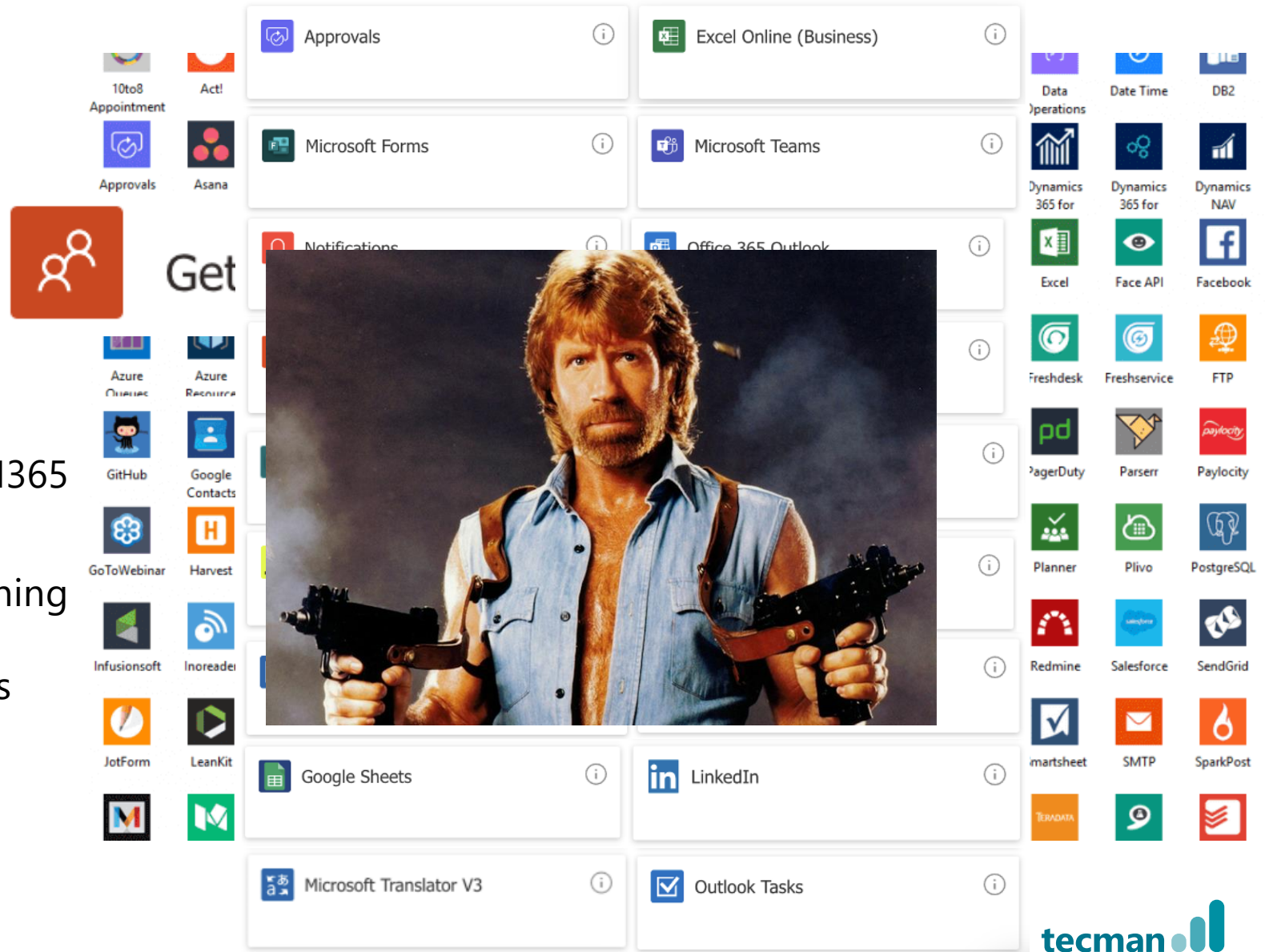
# What is Power Automate?

- Automation / Workflow Tool
- Over 1000 connectors to other systems
- Designed for no-code
- 3 Flavours
  - Power Automate – Cloud
  - Power Automate Desktop (RPA)
  - Azure Logic Apps
- We refer to the processes as 'Flows'
- Start with a Trigger (event / time / manual)
  - Logic / Conditions
  - Actions

The screenshot displays the Power Automate web interface. At the top, there's a navigation bar with 'Microsoft Azure' and a search bar. Below it, the breadcrumb path reads 'Home > MyStandardLogicApp | Workflows > Stateful-Workflow'. The main workspace shows a workflow diagram with the following steps: 'Manually trigger a flow', 'Extract information from invoices', and 'Create text with GPT on Azure OpenAI Service'. These are followed by a 'Condition' step that branches into 'True' and 'False' paths, each leading to a 'Send email (V2)' action. On the right side, a 'Copilot PREVIEW' chat window is open, displaying a welcome message: 'Welcome to Copilot in Power Automate. Be more efficient than ever with AI assistance. Simply tell Copilot what you want to do and it will do it for you.' Below the message, it shows '1 of 3' and a 'Next' button. At the bottom of the chat window, there's a text input field with a character count '0/2000' and a 'Send' button. A disclaimer at the very bottom states: 'Make sure AI-generated content is accurate and appropriate before using. This feature is in preview. See terms.'

# Connectors

- Over 1000 connectors
- Not all of them so useful!
- 4 types
  - Built in (core functions / connections) - Free
  - Standard (mainly MS apps) – M365 licensed
  - Premium – pretty much everything else, including Chuck. Needs license for Premium connectors (not free one). Some require additional subscriptions.
  - Custom



# Summary of Power Automate

## Power Automate subscriptions

## Power Automate Add-ons

## Power Automate use rights included with:

## Power Automate Basic

Plans	Capabilities	RECOMMENDED MOTION Power Automate Premium \$15 per user/month <sup>1</sup>	RECOMMENDED MOTION Power Automate Process \$150 per bot/month <sup>2</sup>	Process Mining <sup>3</sup> \$5,000 per 100 GB of data stored/month <sup>4</sup>	Per user \$15 per user/month <sup>1</sup>	Per flow \$100 per flow/month <sup>2</sup> (Minimum purchase 5 licenses)	Hosted RPA Add-on <sup>5</sup> \$215 per bot/month <sup>2</sup>	Unattended RPA Add-on <sup>5</sup> \$150 per bot/month <sup>2</sup>	Power Apps	Select D365 licenses	Windows	Use rights with Select M365/O365 licenses
Power Automate <sup>6</sup>	Cloud flows (Automated, instant, and scheduled flows)	●	●		●	●		●	● <sup>7</sup>	● <sup>7</sup>		●
	Business process flows	●	●		●	●		●	● <sup>7</sup>	● <sup>7</sup>		
	Attended desktop flows	●									● <sup>8</sup>	
	Unattended desktop flows		●				●	●				
Process Mining	Task Mining	●		●								
	Cloud flows process mining integration	●		●								
	Visualize and analyze processes	● <sup>9,10</sup>		●	●							
Share and collaborate	Other users can view, edit, or run automations	●			●			●	●		●	
Power Platform connectors	<u>Standard</u> connectors	●	●		●	●			● <sup>7</sup>	● <sup>7</sup>		●
	<u>Premium</u> and <u>custom</u> connectors	● <sup>11</sup>	● <sup>11</sup>		●	● <sup>11</sup>			● <sup>7</sup>	● <sup>7</sup>		
	On prem & cloud svcs. data transfer	●	●		●	●			● <sup>7</sup>	● <sup>7</sup>		
AI Builder	Service credits <sup>12</sup>	5,000	5,000				5,000	5,000				
Dataverse	Dataverse use rights	●	●		●	●			● <sup>7</sup>	● <sup>7</sup>		Within Teams only
	Database capacity (Accrued)	250 MB <sup>13</sup>	50 MB <sup>13</sup>	2 GB <sup>13</sup>	250 MB <sup>13</sup>	5 0MB <sup>13</sup>						
	File capacity (Accrued)	2 GB <sup>13</sup>	200 MB <sup>13</sup>	1 TB <sup>13</sup>	2 GB <sup>13</sup>	200 MB <sup>13</sup>						
Managed Environs.	Admin and governance at scale <sup>14</sup>	●	●		●	●			●	● <sup>7,15</sup>		



# Some rules when creating Cloud Flows

- Be mindful of the environment you're working in – default, sandbox, production.
- Flows must be owned by licenced users – MS are really cracking down on this.
- Co-Ownership



# Latest Features



# Latest Features

- New Designer
- CoPilot
- Flow history only stays for 28 days, can now use Application insights / telemetry to report on this for a longer period.
- Overview of flow performance / failures (Process Mining)
- Excel on line – automate processes – currently in preview

# New Designer

*What are the latest changes?*

- Brand new user interface
- Co-pilot assistance pane
- You can now search for dynamic content in the expression editor.
- Faster save & load times.
- Our honest opinion...

The screenshot displays the Power Automate flow designer for a flow named "Find Related Order in CRM". The interface includes a left-hand pane with "Parameters" (Table Name: Orders), "Advanced parameters" (Showing 1 of 8), and a "Filter Rows" section with a search bar containing "ordernumber eq 'body/your...'. Below this, it shows the connection to "Microsoft Dataverse CustomerDay2024CustomerServiceExcellencein2024-260a5".

The main canvas shows a vertical sequence of steps: "When a record is created (V3)", "Get Order", "Get Order 2", and "Find Related Order in CRM". A "Co-pilot assistance pane" is open over the "Find Related Order in CRM" step, showing a search bar and a list of dynamic content items: "Get Order", "Id", "No.", "External Document No.", "Order Date", and "Posting Date".

On the right side, a larger view of the flow is shown, including steps like "Apply to each", "Find Comments Related to Order in CRM", "Apply to each 2", "Create Comment Line on SO", and "Update Comment with BC ID".

# Co-pilot

*"Describe it to design it"*

- Use natural language to describe how you want your flow to behave and AI will attempt to build out your trigger, connections and actions for you.
- What can it do? How well does it perform?
- Provides more of a starting point that can be tweaked and built upon as opposed to doing all of the work for you.
- Currently supports the most commonly used actions and connectors but there will be more to come soon!

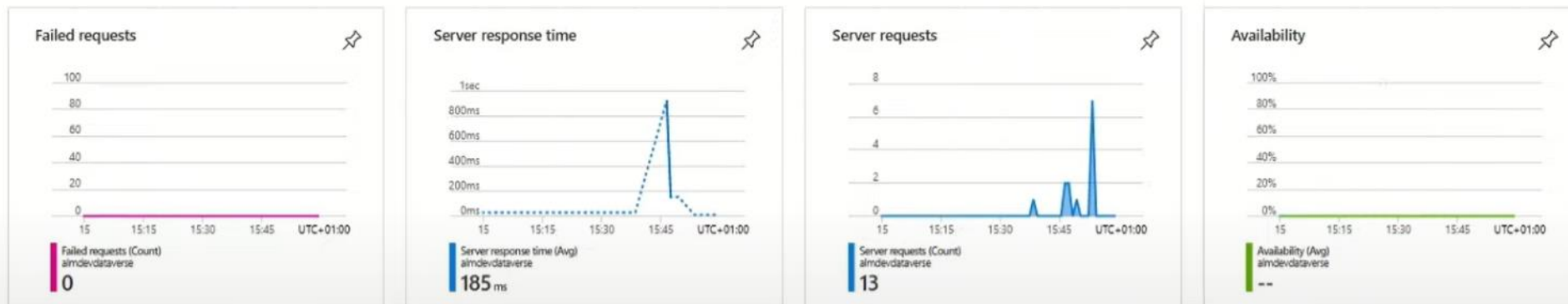
*Let's try it out...*

# Azure Application Insights

- Configure the telemetry from your flows to be exported to application insights to monitor performance.
  - Failed requests
  - Volume of requests
  - Server response time
- Can be used alongside Azure Alerts to send real-time notifications when flows fail.
- Can only be used with **managed** environments.
- Some similar insights also already available in the Power Platform Admin Centre.

Show data for last:

30 minutes 1 hour 6 hours 12 hours 1 day 3 days 7 days 30 days



# More New Features...

- Process mining – more data insights.
  - Use route-cause analysis to uncover process inefficiencies.
  - Can now connect directly to your Azure data lake.
- Excel Online – automate processes.
  - Build flows directly in Excel Online.
  - Access to pre-built templates.
  - View and manage flows from within Excel.

# Power Automate with Business Central





# Power Automate with BC Examples

- Integration (SFTP / OneDrive / SQL (incl. running stored procedures))
- Complex Approvals
- Workflows generated from BC (Demo) – “kick off a flow against this record”
- Sales Order Process Automation
- Business Events
  - Shipment posted – email customer
  - Clever Dynamics - Quality Order fails
  - Celebrate Winning an Opportunity (Demo)
- E-Commerce



## DEMO (s)

Send Email on Open Invoices

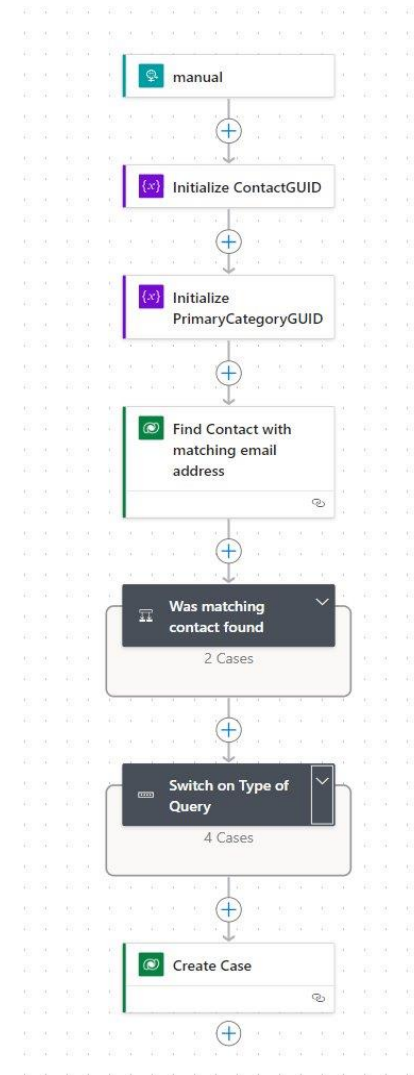
Sales Win – Inform the Team!



# Power Automate with D365

# Power Automate with D365 - Webhooks

- Use Power Automate to create a connection between your online webforms and CRM.
- Automatically create records in CRM as a result of a webform submission.
- What have we used webhooks for?
  - Contact Form
  - Warranty Registration
  - Visit Request
  - Cases/ticket submission



# Power Automate with D365 - BC/CRM Integration

- Standard integration has its purpose, but not everything is possible – bridge the gap using Power Automate.
- Lots of tables / fields already available to use in the standard Business Central connectors. Use APIs to expose anything that's not already there.
- Example: Use Power Automate to add comment lines on a SO in CRM which syncs to the SO lines in BC.

The screenshot displays the Dynamics 365 Business Central interface for a Sales Order. The main content area is titled "Sainsbury's Order 15/04" and includes a summary section with the following details:

- Order ID\*: ORD-01053-N9X4T0
- Business Central Order Number: ---
- Name\*: Sainsbury's Order 15/04
- Currency\*: British Pound
- Price List: ---
- Prices Locked\*: No

The PRODUCTS section is a table with the following data:

Price Per Unit	Quantity	Quantity On Hand (Existing...)	Discount	Extended Amount
£1.24	1.00000	2,639.00		£1.24
£1,897.00	1.00000	4.00		£1,897.00
£4.96	1.00000	2,757.00		£4.96

The SHIPPING DATES section shows:

- Requested Delivery: ---
- Date Fulfilled: ---

The SHIPPING INFORMATION section shows:

- Shipping Method: UPS
- Payment Terms: 21 DAYS
- Freight Terms: ---

The SALES INFORMATION section shows:

- Opportunity: ---
- Quote: Sainsbury's Order 15/04
- Potential Customer: Sainsbury's

The DESCRIPTION section shows: ---

The summary section also includes a table with the following data:

Detail Amount	£1,903.20
(-) Discount (3%)	---
(-) Discount	---
Pre-Freight Amount	£1,903.20
(+) Freight Amount	---
(-) Total Tax	£0.00

# More Potential Use Cases

- External Open APIs
  - Connect to Companies House for data validation.
  - Credit checks using Experian or Credit Safe for new opportunities.
- Build a custom connector for Shopify to create leads for abandoned check outs.

Connector Name: Shopify

1. General > 2. Security > 3. Definition > 4. AI Plugin (preview) > 5. Code > 6. Test

Swagger editor Update connector Close

General information

Add an icon and short description to your custom connector. Your host and base URL will be automatically generated from the swagger file.

General information

Upload connector icon  
Upload Supported file formats are PNG and JPG. (< 1MB)

Icon background color  
#007ee5

Description  
Custom connector for Shopify

Connect via on-premises data gateway [Learn more](#)

Scheme \*  
 HTTPS  HTTP

Host \*  
api.contoso.com

Base URL

Companies House (Independent Publisher)

Search connectors and actions

Triggers Actions See more

- Address By Number PREMIUM  
Companies House (Independent Publisher)
- Charges By Company Number PREMIUM  
Companies House (Independent Publisher)
- Charges By Number and Charge Id PREMIUM  
Companies House (Independent Publisher)
- Company Officers By Company Number PREMIUM  
Companies House (Independent Publisher)
- Company Officers By Number and Appointment Id PREMIUM  
Companies House (Independent Publisher)
- Filing History By Company Number PREMIUM  
Companies House (Independent Publisher)
- Filing History By Number and Id PREMIUM  
Companies House (Independent Publisher)
- Find Company By Number PREMIUM  
Companies House (Independent Publisher)
- Individual PSC PREMIUM  
Companies House (Independent Publisher)

# What's Next?

- Go try it!
- Get some training
  - Speak to your Account Manager
  - <https://learn.microsoft.com>
- Ask for help if needed
- Reduce Process Fat



# Questions?



Thank you.

CRM  
**connect**

THURSDAY 25 APRIL 2024

