

# Microsoft Flow

The low down

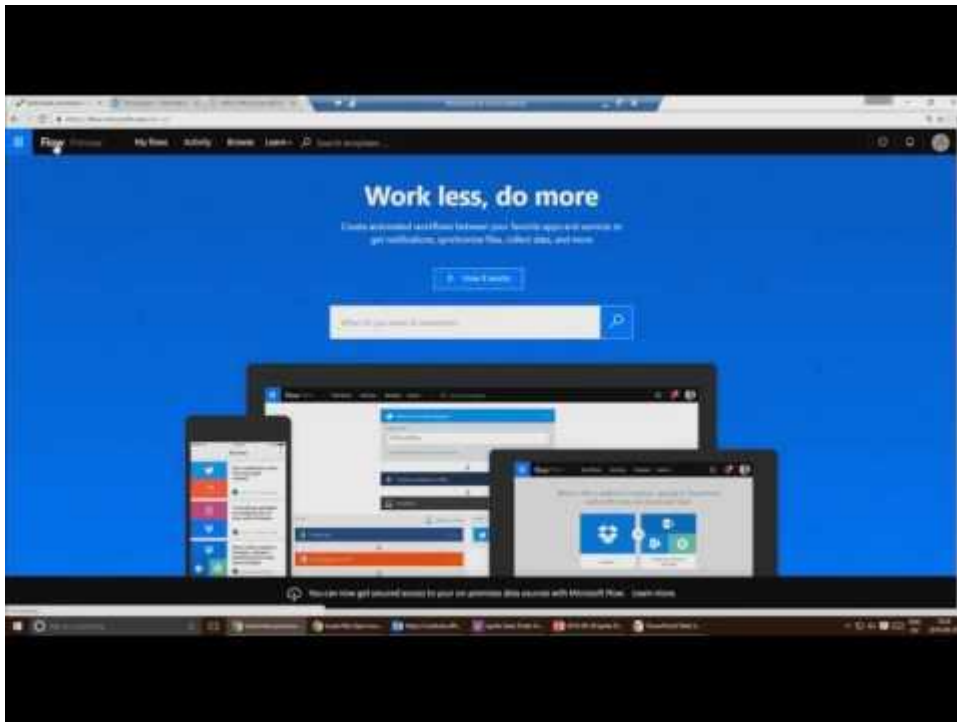
## Microsoft Flow – What is it?

Flow is a new app that is part of Office 365 suite. It is included in most of Office 365 subscriptions and can be accessed via Office 365 app launcher.

Microsoft Flow is a cloud-based software tool that allows users to create and automate workflows across multiple applications and services without the need for Development Team's help. Automated workflows are called flows. It allows you to automate business processes by building workflows based on certain triggers and actions.

This URL will open Microsoft Flow website. <https://flow.microsoft.com>

Below video will help you to understand Microsoft Flow in detail.



## The skinny

Microsoft Flow with based “Connector” and “Trigger”.

A connector is a proxy or a wrapper around an API that allows the underlying service to talk to Microsoft Flow, PowerApps and Logic Apps. It provides a way for users to connect their accounts and leverage a set of pre-built actions and triggers to build their apps and workflows.

With Microsoft Flow, you can connect to more than 100 data sources right out of the box, such as the following:

- Box
- Dropbox
- Dynamics 365
- Facebook
- Google Drive
- Google Sheets
- Office 365
- OneDrive
- OneDrive for Business
- Salesforce
- SharePoint
- SQL Server
- Trello
- Twitter

The [complete list](#) can be found under "reference." You can also create [custom connector](#).

## How easy is it to learn?

It is easy to use Microsoft Flow. It's has simple user interface. So non-technical user can also create a workflow using Flow.

Only you need to understand some syntax of regular expression if you want to use it.

This [link](#) will help you to build your first work flow very easily.

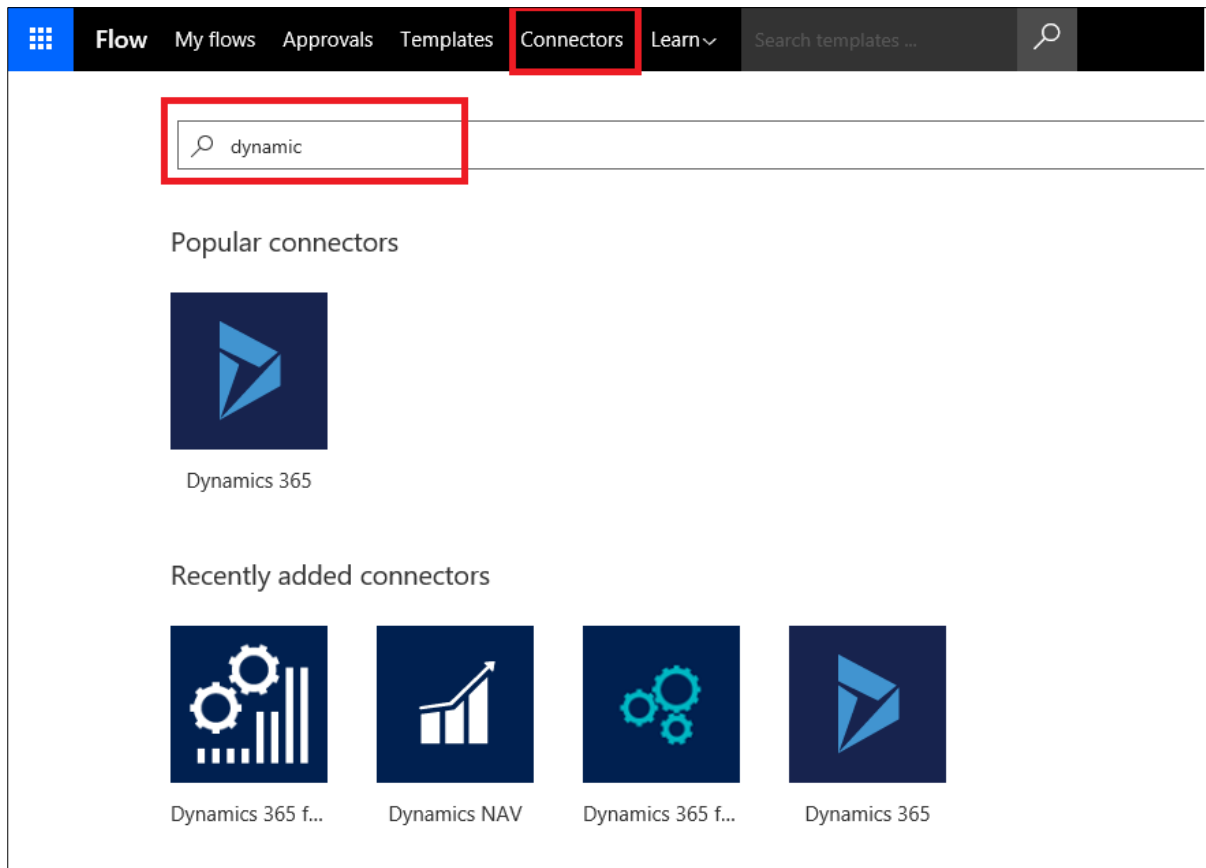
## The Good

1. Automate time-consuming tasks between numerous services.
2. Easy to use in mobile application.
3. Integrate with other services such as Dynamic CRM, Slack, Mail Chimp, Azure, SharePoint, Facebook, Twitter – both inside and outside the Office 365 platform.
4. Create and customize Microsoft Flow instead of SharePoint custom Workflow easily.
5. Creation of CRM entities based on the SharePoint list.
6. Helps to connect with Power BI and enables the use of Azure services.

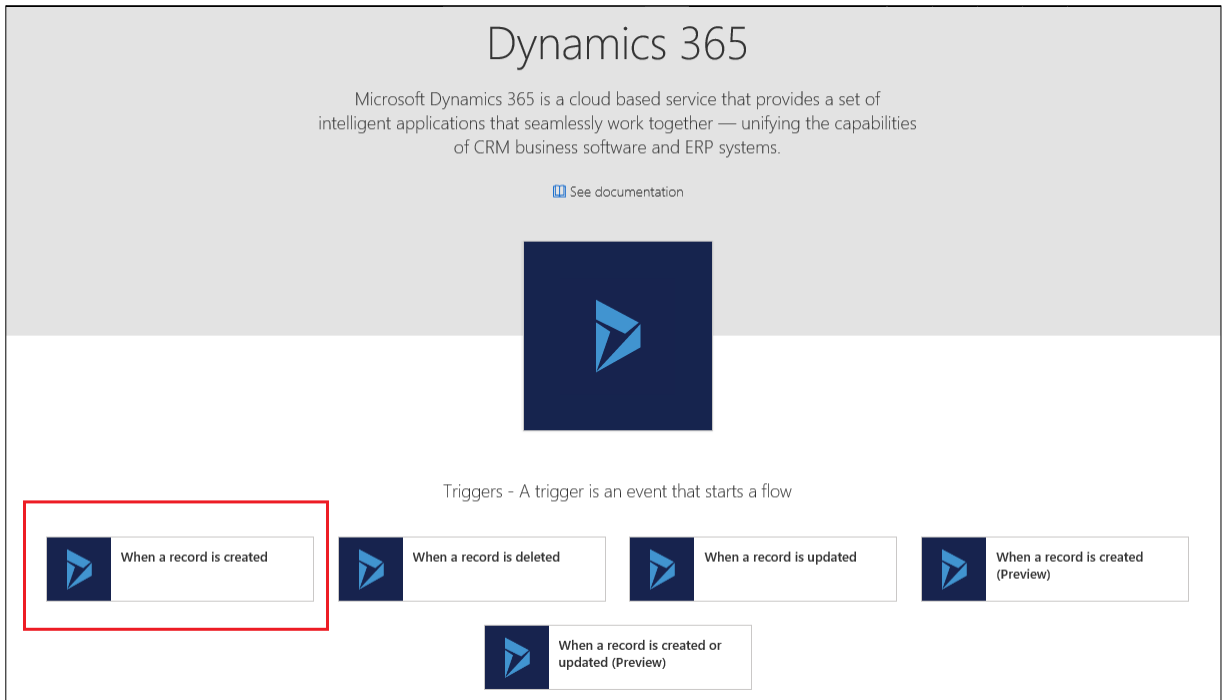
## Sample

In this demo we will use Dynamics 365 and SharePoint list. When new record is added to the Dynamics CRM entity, we will also create/updated record in SharePoint list based on data entered in Dynamics CRM.

1. Open <https://ms.flow.microsoft.com> URL. And click on “Connectors” link from top menu. And then search for “dynamic” using search option as shown in below screen.

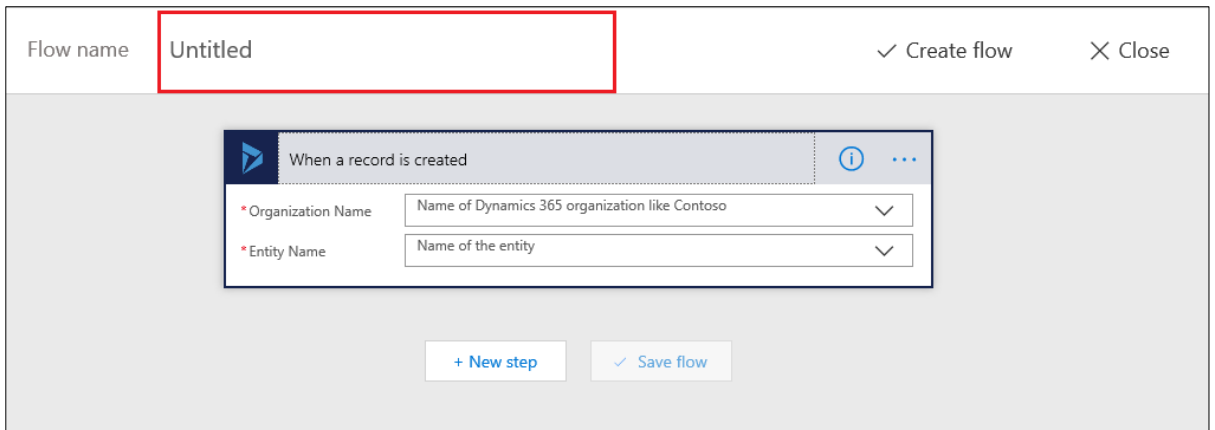


2. You will see connector for Dynamics 365. Now click on “Dynamics 365” connector. It will take you to the page where you can select the trigger. Trigger is an event that start a flow. Below is the screen for that.

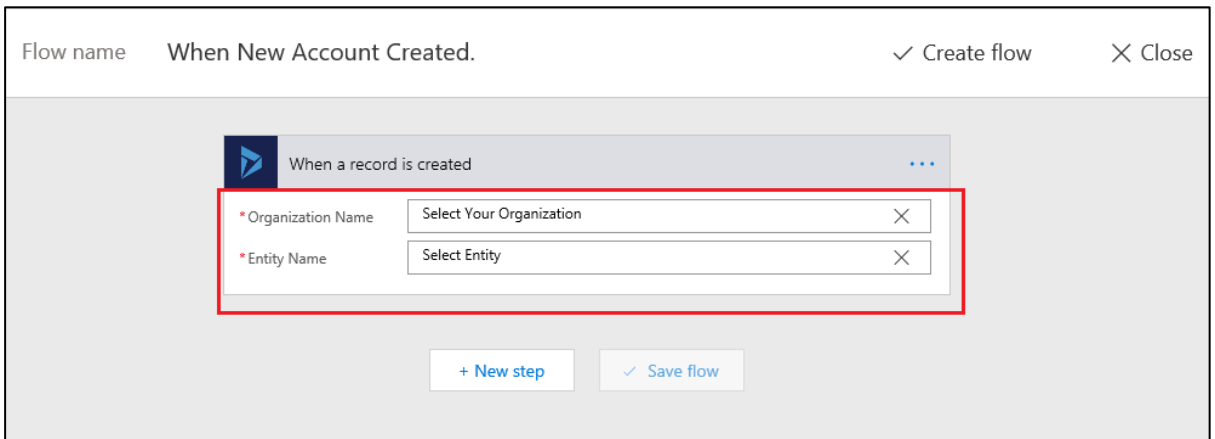


And from the above screen click on 1<sup>st</sup> option and that is “When a record is created”

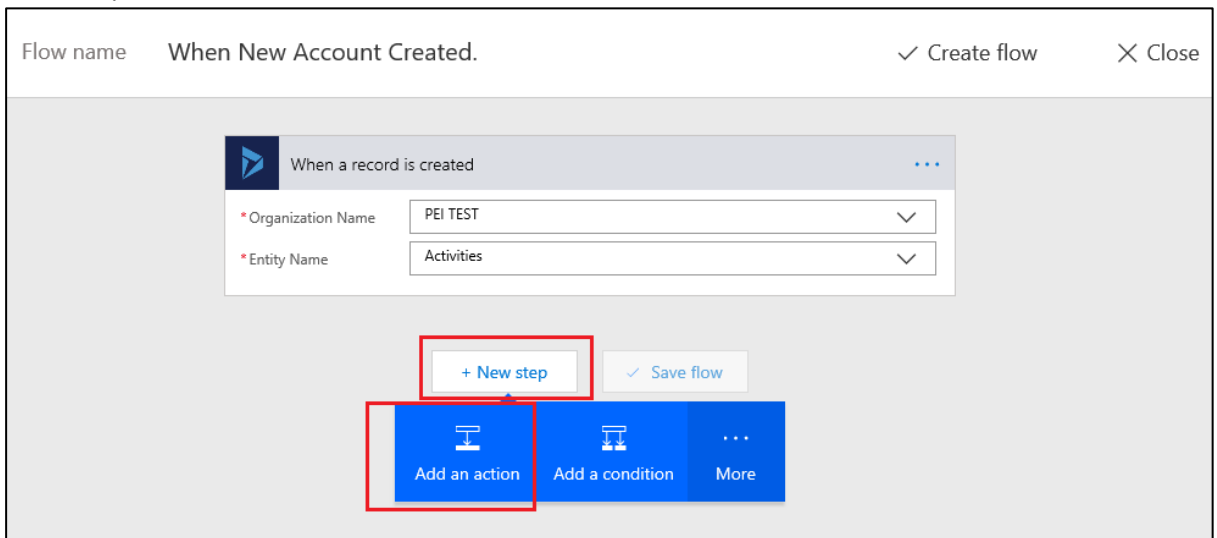
- Once you click on a trigger it will redirect to another page where you can configure your flow. Below is the screen for that. Enter your flow name.



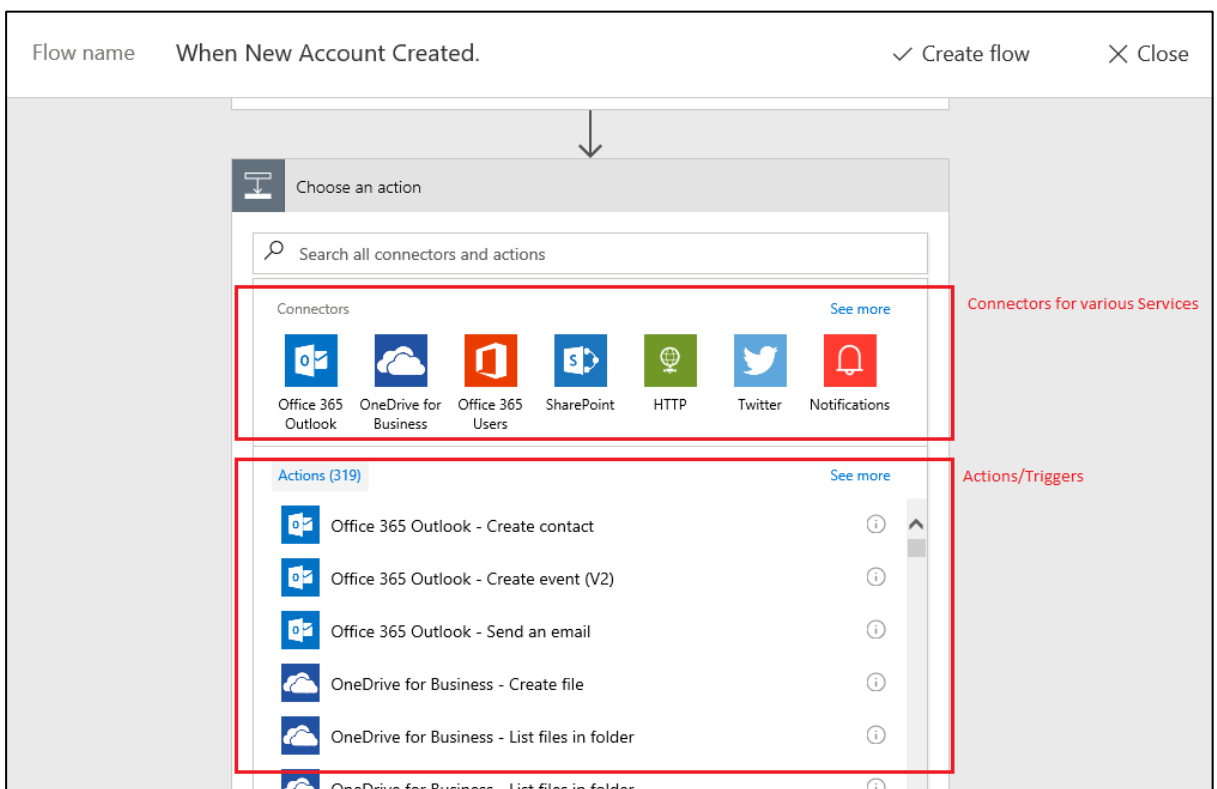
- Select the “Organization Name” and then after select the “Entity Name” on which you need to trigger a flow.



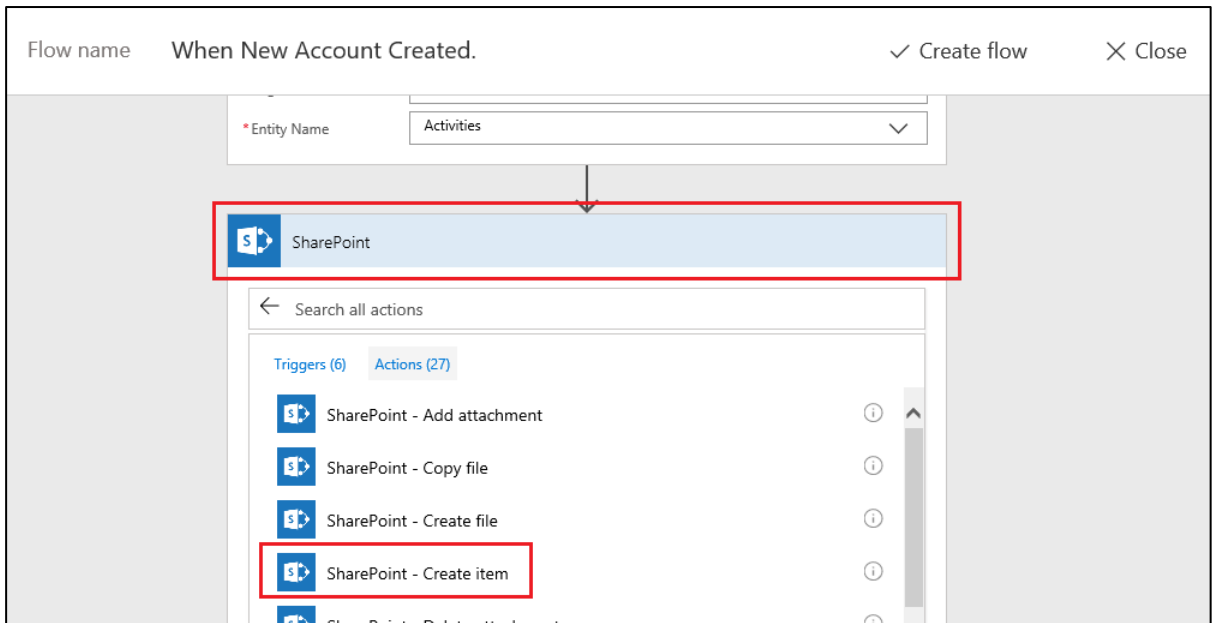
5. Click on “New step” button. And will open new menu and from that menu click on “Add an action” option.



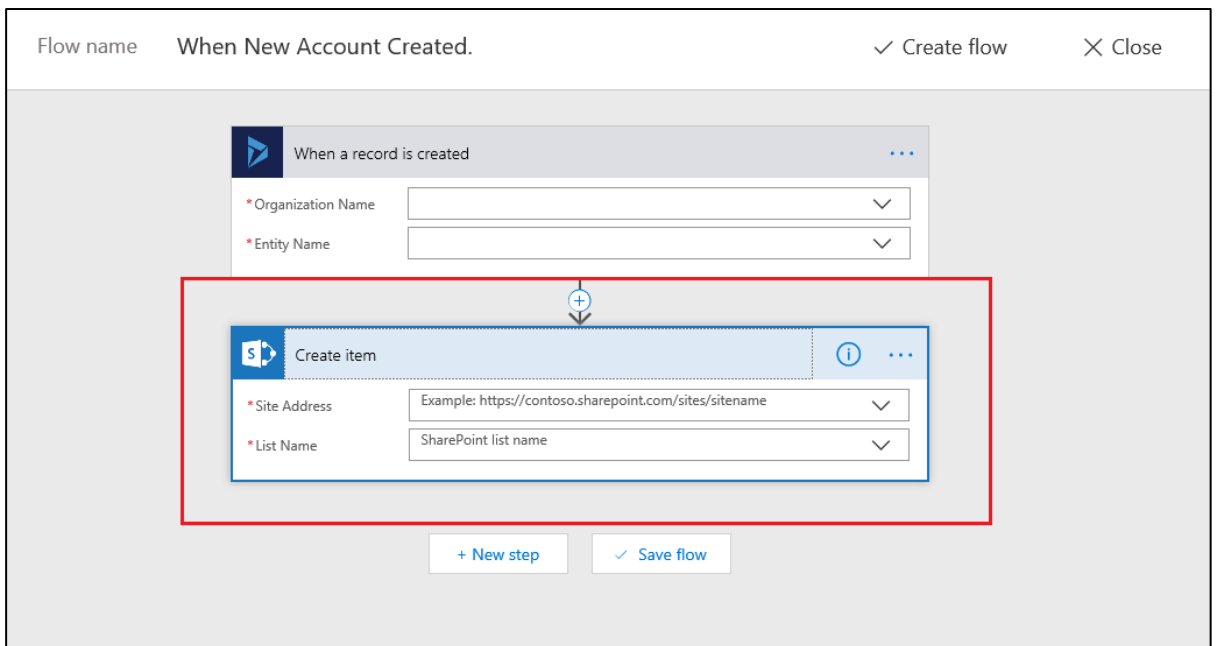
6. Once you click on “Add an action” option new action will be created. From that option you can chose various actions that you want to perform from numerous services.



7. Here we will select the “SharePoint” connector and from that SharePoint connector we will select “SharePoint – Create item” action. Below is the screen for that.

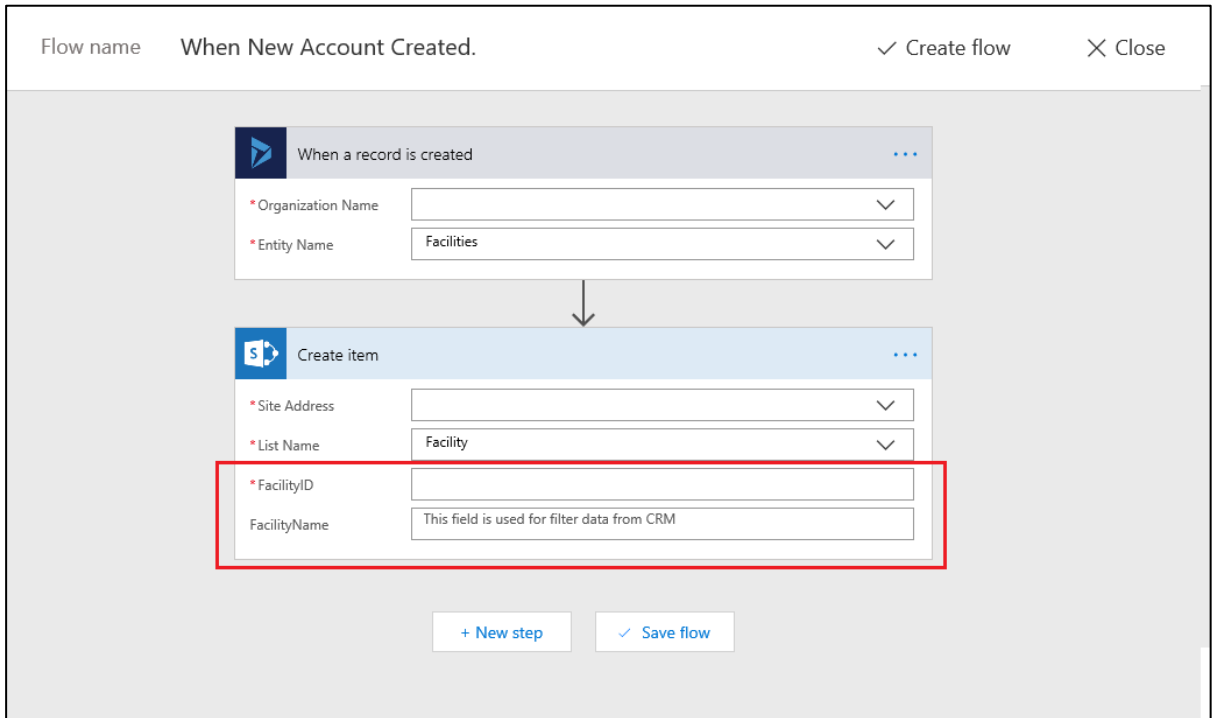


8. Once you click on "SharePoint – Create item" option new action will be created as below screen.



9. Now you can select your SharePoint site. And from that site you need to select the list in which you want to add data from Dynamic CRM to SharePoint list. Once you select that List,

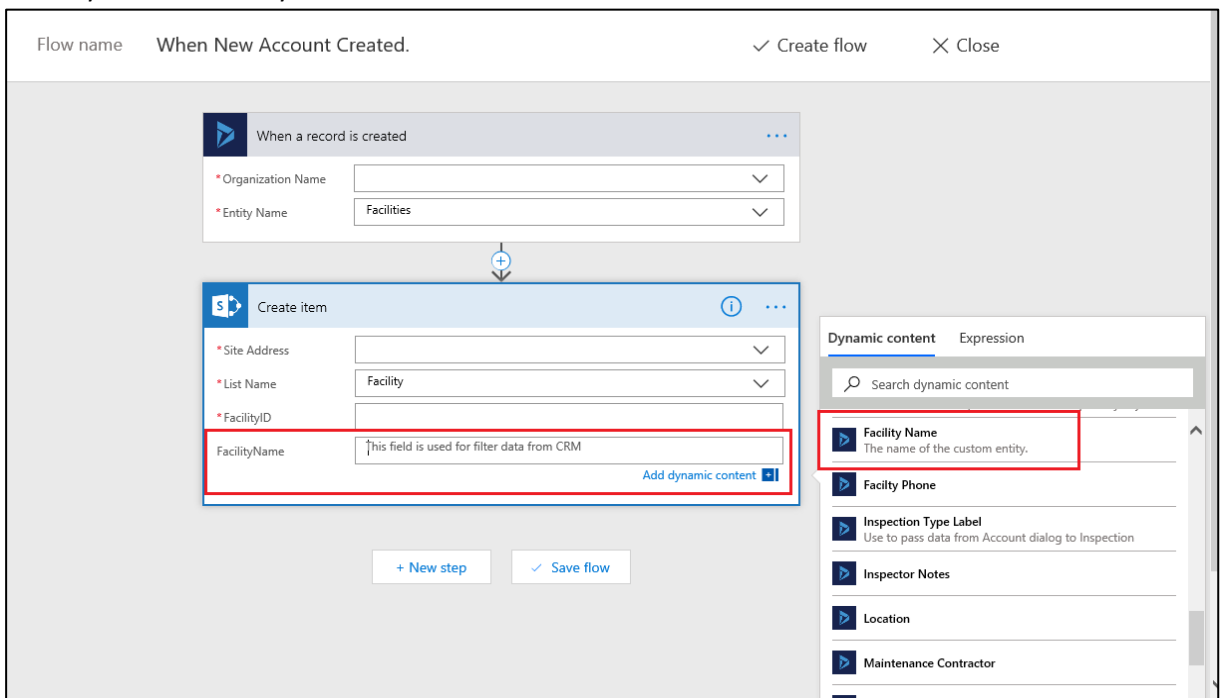
automatically all its column/fields will be available. Below is screen for that.



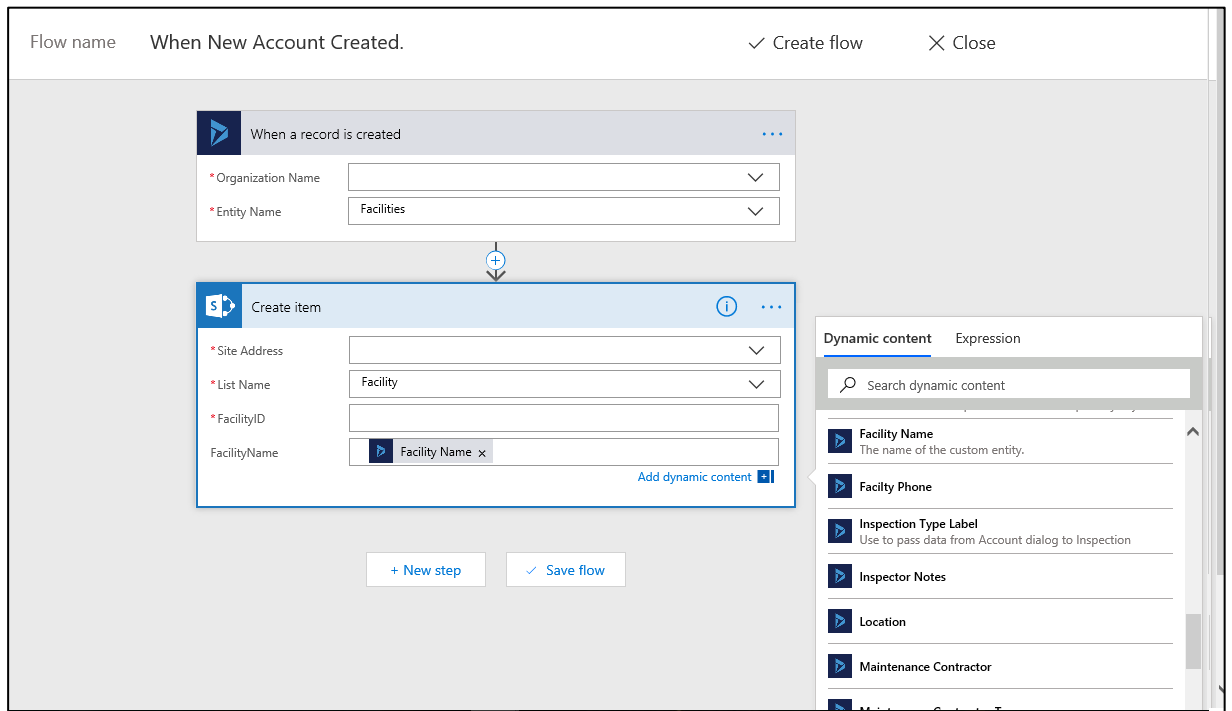
10. Once you click on the any SharePoint list field “Dynamic Content” menu will come. From that you can select the Dynamic CRM entity fields. For example:

We have select the “Facilities” entity from Dynamic CRM and from the SharePoint list we have select the “Facility” list.

So, for this demo we are going to create new list item in SharePoint list and we will only fill “Facility Name” from Dynamic CRM to SharePoint list.



- Now to bind the data you need to click on the CRM entity field name. So, it will bind to the SharePoint field. Below is the screen for that.



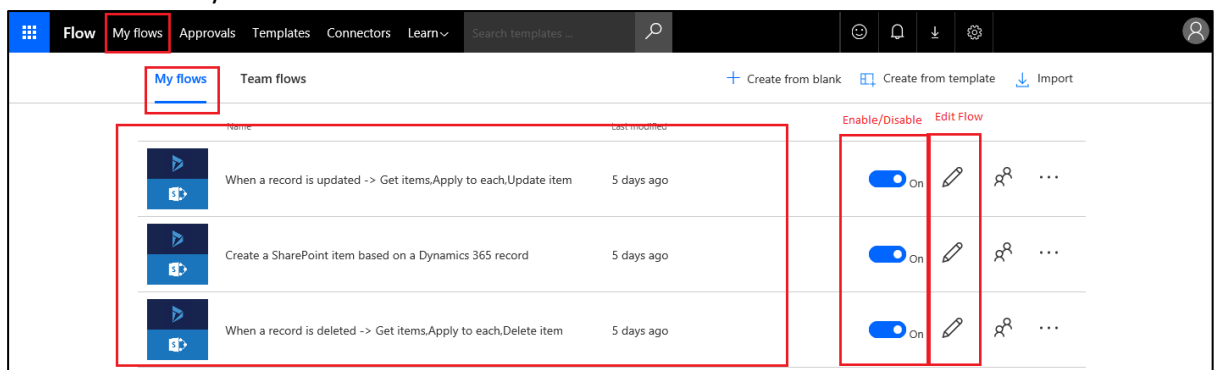
- Now you are done. Click on "Save flow". So whenever new entry made to the Dynamic CRM entity called "Facilities" this flow will trigger, and the flow will create new item inside the SharePoint list called "Facility"

### Important Note for Dynamic CRM entity:

- Whenever you create any flow for Dynamic 365 entity, you need to make sure that "Change Tracking" option is checked for that entity. For more details you can visit this link <https://technet.microsoft.com/library/3fa9c316-9dc9-4b28-9abf-43a3fce5b01d.aspx>

### View flows

- To see how many, flow are available click on "My flows" option. It will show list of flows. From this screen you can edit the workflow.





2. If you click on any flow it will open details page for that flow. From that page you can check various reports for that flow.

← Create a SharePoint item based on a Dynamics 365 record Edit flow More This flow is  On

**Create a SharePoint item based on a Dynamics 365 record**  
Create an item in SharePoint list when a new record is created in Dynamics 365.  
[Edit description](#)

[See analytics](#)

**CONNECTIONS** See all >

- SharePoint
- Dynamics 365

**OWNERS** See all >

- 
- [Add another owner](#)

**RUN HISTORY** See all >

✓ Succeeded	2 days ago	0 seconds	>
✓ Succeeded	2 days ago	2 seconds	>
✓ Succeeded	5 days ago	0 seconds	>
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