7 Awesome Automations

created in

Microsoft Power Automate

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In the pursuit of automation of manual business functions routinely performed by employees, our team will review our organizations' business processes to see where repetitive tasks could be offloaded to a Microsoft PowerApps Flow. We want to free up humans to do higher-value activities that benefit the organization and build business relationships. Presented below are a few of the most interesting and beneficial automations recently created by our team using the Microsoft Power Automate platform.

#1 Automate Marketing Tasks

The Challenge

In a recent project, our team was working with an organization who offers in-person and online tutoring services for children and teens. Interested parents or family members can fill out a web form requesting a call back regarding the possible options for appointment times, tutoring plans, and costs. Our organization's team would manually go through these requests to remove "spam" submissions and assign legitimate requests to sales agents for follow up.

The Solution

To assist the organization, who received many website requests for information or appointments, our team created a Microsoft Flow that pulled the data from website submissions, brought the details in to Microsoft Dynamics 365 and assigned the lead to a sales agent. In addition, a repeating process in Power Automate would send several reminder emails to the prospect, asking them to call to speak with an account representative about their tutoring needs.

The Benefit

By automating the initial contact web form information, the organization's inbound data gathering process was streamlined and pruned, so that "spam" or incomplete web form submissions would not pull sales team focus from genuine leads. By sending reminder emails, it also kept the organization's name "top of mind" with prospects.

#2 ATTACH FREQUENTLY USED DOCUMENTS TO EMAIL

The Challenge

Our team recently worked on a project with an organization who assists owners of real estate when they are ready to "trade up" to another property. One of the key business processes that happens when a prospect contacts this organization is to send out legal information in an electronic packet of forms. Depending on the prospect's interest, different documents would be sent for their review. Our team noted that the process of manually creating an introduction email and attaching the relevant documents required extra time for the sales agent and was prone to errors if the wrong document was sent and had to be retracted, or a document was not sent, and it delayed the progress of the transaction.

The Solution

To provide a more streamlined process for sending out the correct documents on emails from the organization, our team created a combination of on-form field-based triggers and a Microsoft Flow process. When a user needs to send frequently used files via email, they select from a list of standard documents and the automation attaches the correct files to the outgoing email message.

The Benefit

The organization's employees now need fewer clicks to send a set of documents via email and can complete the task in less time. Completing the necessary forms is time bound, so efficiency and accuracy are important during the process. Preventing incorrect documents from being sent or omitting documents from the initial email ensures the maximum possible time to complete the necessary forms.

#3 Special Pricing Logic

The Challenge

Another great automation our team created was for an organization with customized pricing logic that did not follow the standard rules for Dynamics 365 price lists or typical form logic. This organization had segregated some accounts into specific groups and had also customized contract terms for specific customers. Either or both factors could influence product pricing and overall order totals. To manually apply changes to product pricing for certain quantities, negotiated values or other factors would be very time-consuming for the salesperson and complex to manage for the billing team, especially if errors were found after payment was received.

The Solution

Our team created a Microsoft Power Automate Flow that triggers on a change to the product quantity or price per unit value and then gathers the membership for additional groups or special adjustments into the calculations to arrive at final value for the order that is specific for the organization's contracted terms.

The Benefit

The value of accurate pricing on orders is immeasurable because organizations expect it every time. By automating the process for running complex calculations, on a per-customer basis, the sales team saves time when creating orders and prevents negative customer impressions by providing accurate pricing every time.

#4 Sort and Convert Files When Added to Microsoft SharePoint

The Challenge

From a recent meeting with one organization, we learned about a very manual process for a key business workflow. A vendor would provide files which required a manual conversion process before it could be imported to Dynamics 365. In addition, the files represented different types of data – inventory updates, shipment statuses and receipts for orders or products and required separate templates for importing each type.

The Solution

To streamline this workflow, our team created a multi-step automation that would check for new files in a specific SharePoint folder. When a file was found, it was processed by a Microsoft Flow and the appropriate record in Dynamics 365 was updated – either a product, order, order item or receiving record for an order.

The Benefit

Moving data between disparate systems can be time-consuming and prone to errors. Creating a cascade of events that evaluate data, determine the type, and take follow up steps based for processing, frees up workers to focus on other issues or exceptions to the rules used by the automation. At the end of the day, the processing of external data from a SharePoint folder can be handled quickly and accurately, creating key records – Products, Orders etc. for humans or other automation to handle further.

#5 Find Duplicate Accounts and Merge the Records

The Challenge

In one of our recent technology reviews, we came across a common problem where duplicate Account records were being created and causing confusion for users. Key details for an Account could be spread across multiple records. An Account's owner may not realize there are duplicate accounts, so activities could be logged to the timeline of a duplicate record.

The Solution

Our team created an automated process where an account owner could manually invoke a Microsoft Flow that would check across Dynamics 365 for all instances of duplicates of an account record, either active or inactive. Any duplicate records would be processed in the background so that the most current record (where the process was kicked off) would be preserved with its current data and any blank fields would be populated with data from the duplicate records. As a last step, the duplicates would be removed to avoid confusion in the future.

The Benefit

Taking time to review and merge records reduces an employee's availability for higher-priority activities. For employees who track activities in Accounts and need to know the status at any time, accurate data in the expected location is crucial. A business relationship could be damaged if team members cannot find the latest updates when needed or act on incomplete data. Creating automation to process multiple duplicate records saves time for employees and alleviates the decision by the user around which record(s) and data to keep or remove.

#6 Extract Excel data from SharePoint and present in Power BI

The Challenge

We recently worked with an organization using QuickBooks and a manual process to copy financial data into spreadsheets for sharing within the organization. As with any process like this, it consumes a human worker's attention and is prone to errors.

The Solution

Our team created an automation that started with Excel data copied to SharePoint. We then created a Power Automate Flow that moves the information into an Azure Cosmos database to be pulled into Power BI Reporting for visibility across the entire organization.

The Benefit

Data will be shared with all the necessary team members, for instant access and real-time updates as new data is available. With only one upload to SharePoint required, data will be made available as fast as Power BI can refresh the dashboard.

#7 Temporary Permissions Under Certain Conditions

The Challenge

We recently worked with an organization who wanted a way to automate changing a non-managerial user's Dynamics 365 permissions, to allow access to perform a manager's duties if there was a vacation or call out for one of the current managers. The process needed to be easy and secure for another manager to perform, but with no chance of accidental elevation from an automated trigger.

The Solution

Our team created a Microsoft Flow that could add or remove a specific security role that enabled "manager level" permissions when manually triggered on a user record in Dynamics 365. A user with existing manager permissions would open the user record, tick a check box, and save the record. The Flow would assign the necessary security role. When manager permissions were no longer required, the manager would reverse the process by unchecking the box on the user record and saving.

The Benefit

All organizations experience employee absences – planned and unexpected. Having a process in place to allow "instant elevation" of user with manager-level permissions when needed allows for continuity of operations without delays in key organization functions.

About Beringer Technology Group

Beringer Technology Group is a Microsoft Partner and leading provider of Managed IT Services, Network Infrastructure Support and a Microsoft Application Consultant focusing on Dynamics 365, Power Platform, Business Central, and Azure services located in Maple Shade, New Jersey serving organizations globally.

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Contact us for more information on how your business can leverage automation to get things done faster while freeing up your employees for higher-value activities. If any of these automations could benefit your business, contact the Beringer Technology Group team for assistance!

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