

# Power Automate and Its Possibilities

Mat St. Cyr & Erica Blake

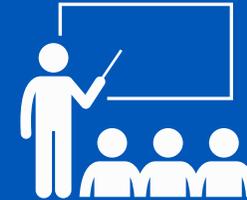
# OUR MISSION IS TO LEVERAGE TECHNOLOGY TO ADVANCE SOCIAL IMPACT



Full-Spectrum  
Nonprofit Tech Services



Nonprofit Educational  
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Tech Career  
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**Mat St. Cyr**

**Manager, Application Development**

As the Application Development manager at Tech Impact, Mat manages a team of technologists that develop and deliver service offerings that help nonprofit organizations strengthen and measure their social impact. They create and implement services that assist nonprofits with multiple different cloud platform technologies such as Microsoft 365, Google and Salesforce.

Mat brings over 12 years of experience from his previous role at Microsoft and has a robust skill set that includes specialization in Power Platform suite services. He also brings unique and valuable volunteer experience with nonprofits that range from animal rescues, low-income housing organizations, foodbanks, and elderly services.



[MAT@TECHIMPACT.ORG](mailto:MAT@TECHIMPACT.ORG)



## Erica Blake

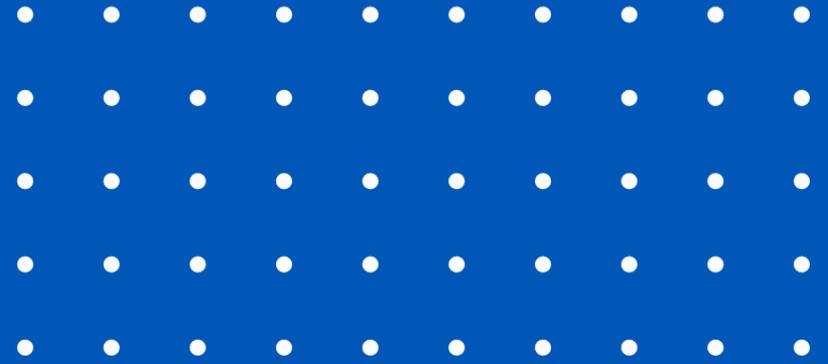
### Senior Consultant, Impact Strategy

Erica joined Tech Impact in 2016 and works with nonprofits to assess their data needs, identify and implement data solutions, and support their overall data maturity growth.

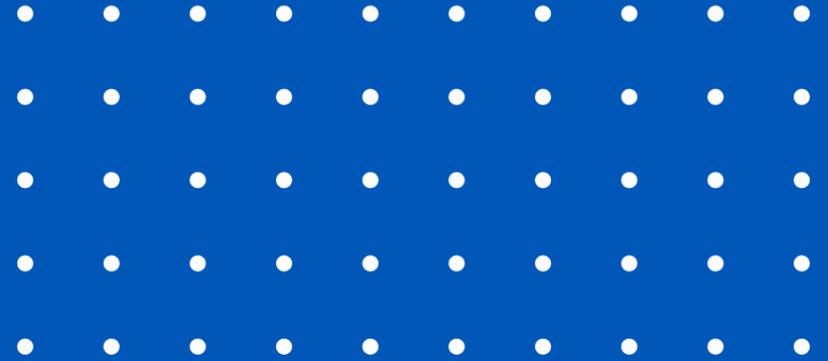
As a Senior Consultant and member of the Strategy Team, Erica brings over a decade of experience working at housing and social service organizations and particularly enjoys helping organizations measure impact and use data for program improvement.



- Walk through a simple automation use case.
- Use the use case to learn about Power Automate and its moving parts.
- Building the automation Step-by-step hands on with automation.
- Q&A



## **Agenda**



## A simple automation use case



- A non-profit organization has events where they hand out forms for potential volunteers.

- They review the information and provide it to the resource best suited for the volunteer's experience or skillset.

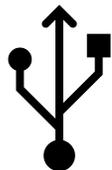
- Those resources follow up and schedule a meeting with the volunteer to discuss what opportunities are available.



# Let's Automate it!



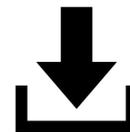
Our volunteers can fill out an online form free with Microsoft Forms.



We create a workflow and add a free\* Microsoft Forms connector to Power Automate.



We add a trigger so Power Automate knows when the form is filled out.

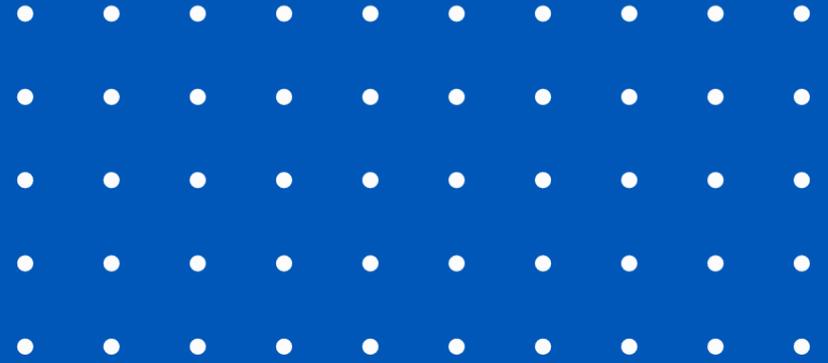


Power Automate collects the populated form information



Power Automate sends an email to different people based on the information.

## What else could we do?

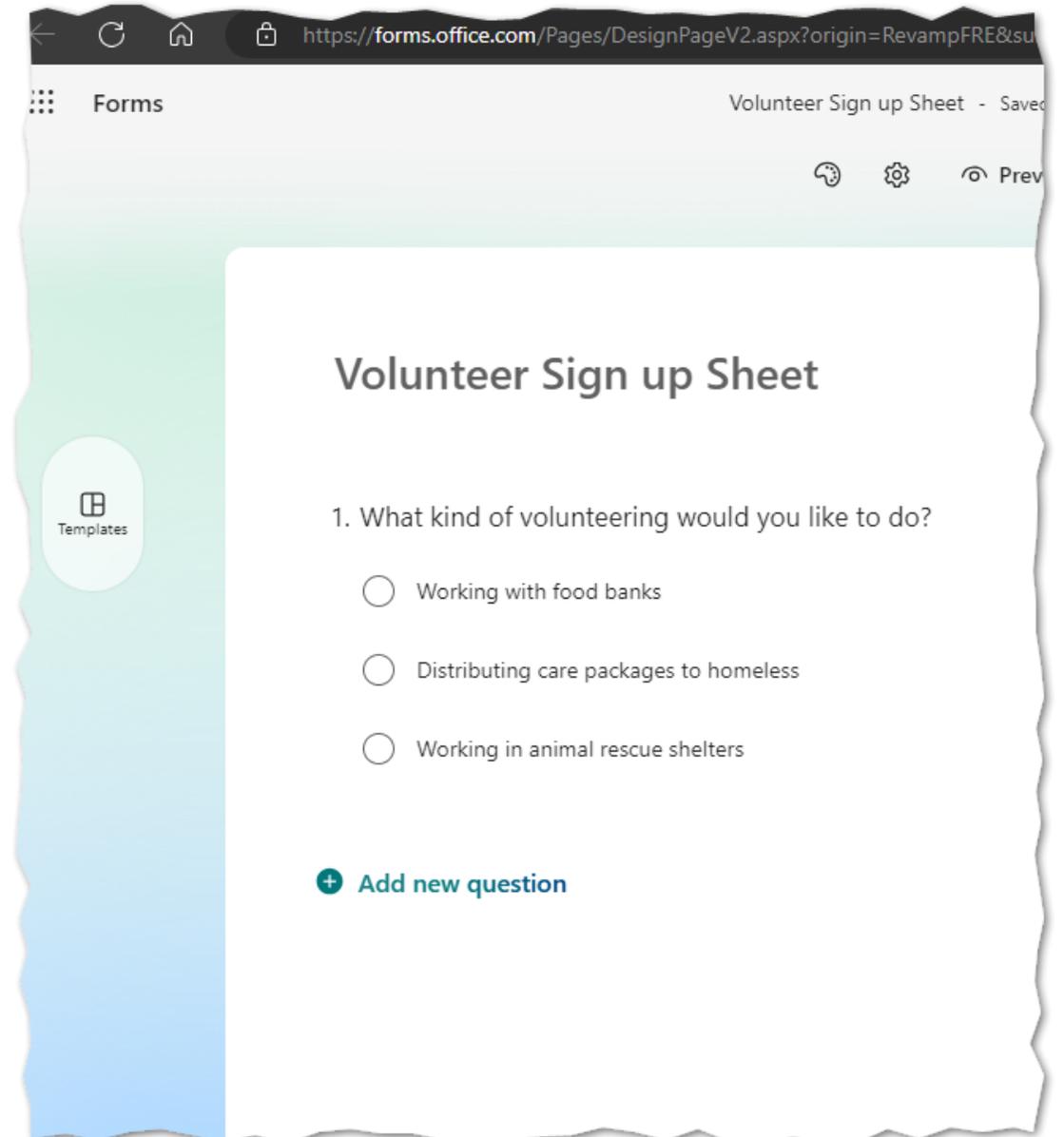


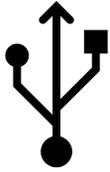
**Hands on with automation- step by step**



"Our volunteers can fill out an online form free with Microsoft Forms."

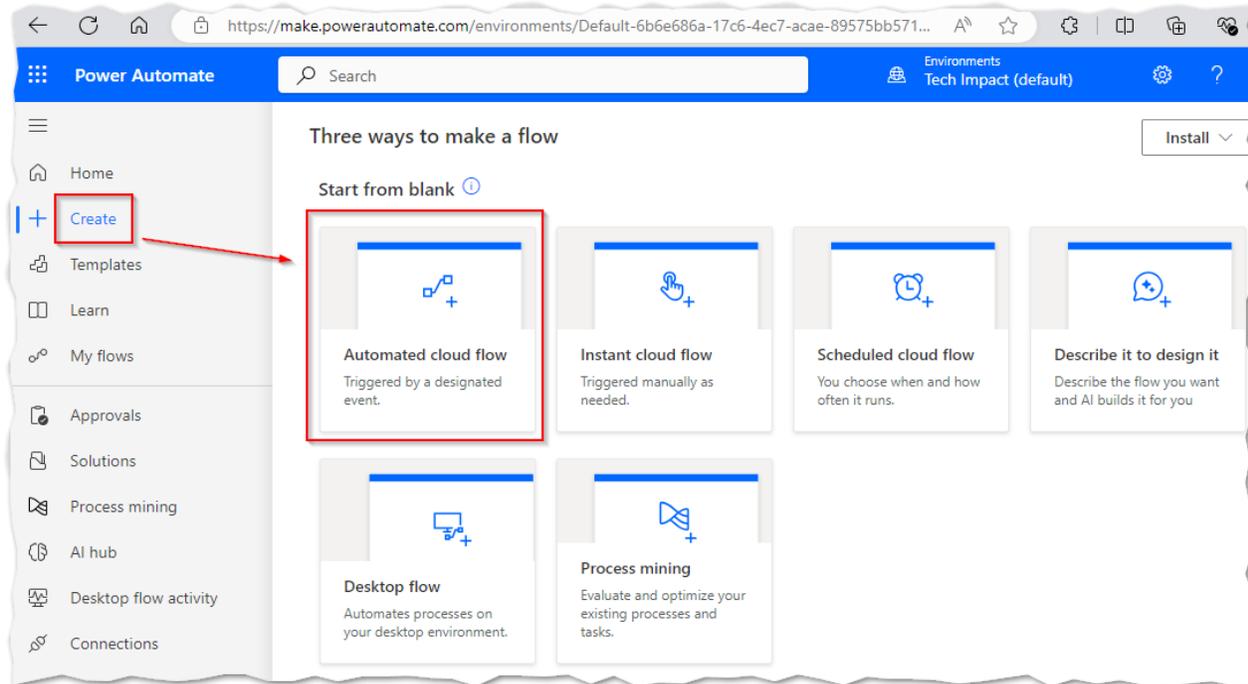
- Log into Microsoft Forms
- <http://forms.office.com>
- Create New Form
- Give your form a Title
- add a choice field to give us a few options to work with.
- Add any other question types you would like to explore. (Have fun!)

A screenshot of the Microsoft Forms design interface. The browser address bar shows the URL: https://forms.office.com/Pages/DesignPageV2.aspx?origin=RevampFRE&su. The page title is "Forms" and the form name is "Volunteer Sign up Sheet". The form content includes a title "Volunteer Sign up Sheet" and a question: "1. What kind of volunteering would you like to do?". There are three radio button options: "Working with food banks", "Distributing care packages to homeless", and "Working in animal rescue shelters". A green plus icon and the text "Add new question" are visible at the bottom of the question area. A "Templates" button is visible on the left sidebar.



We create a workflow and add a free Microsoft Forms connector to Power Automate.

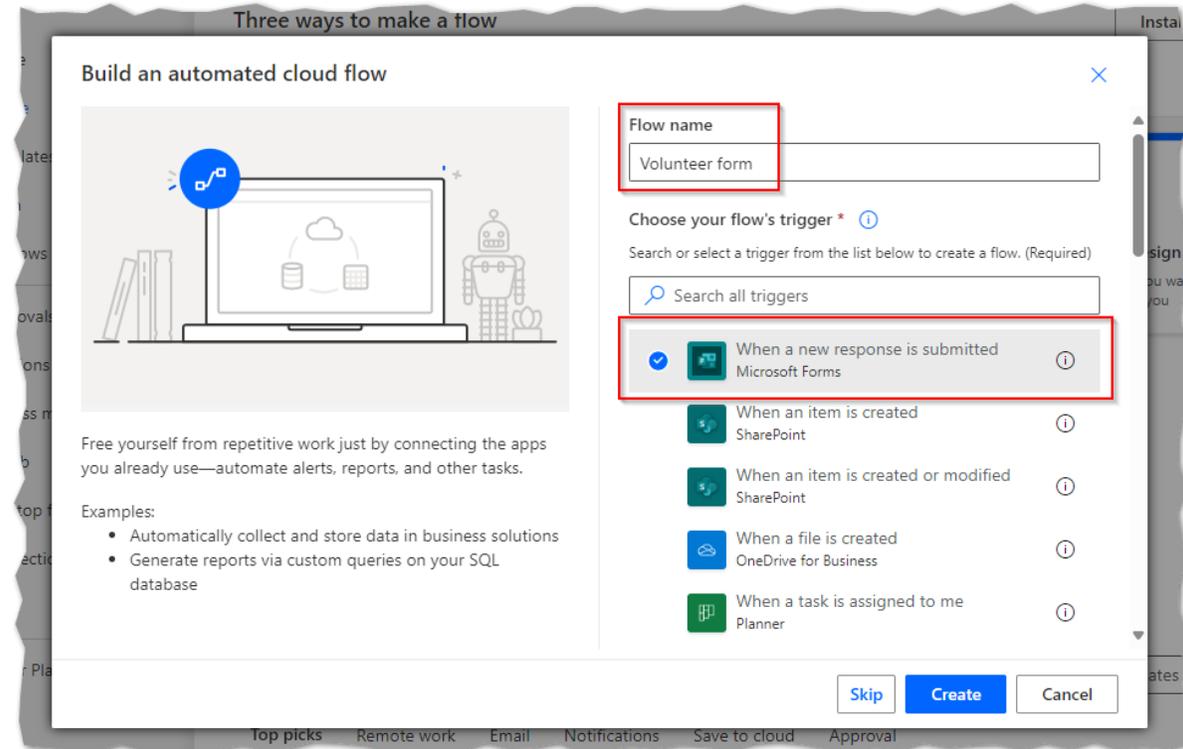
- Log into Power Automate
- [Http://make.powerautomate.com](http://make.powerautomate.com)
- Note the first three types of workflows.
- Automated, Instant, and Scheduled.
- Choose “Automated cloud flow”





We create a workflow and add a free Microsoft Forms connector to Power Automate.

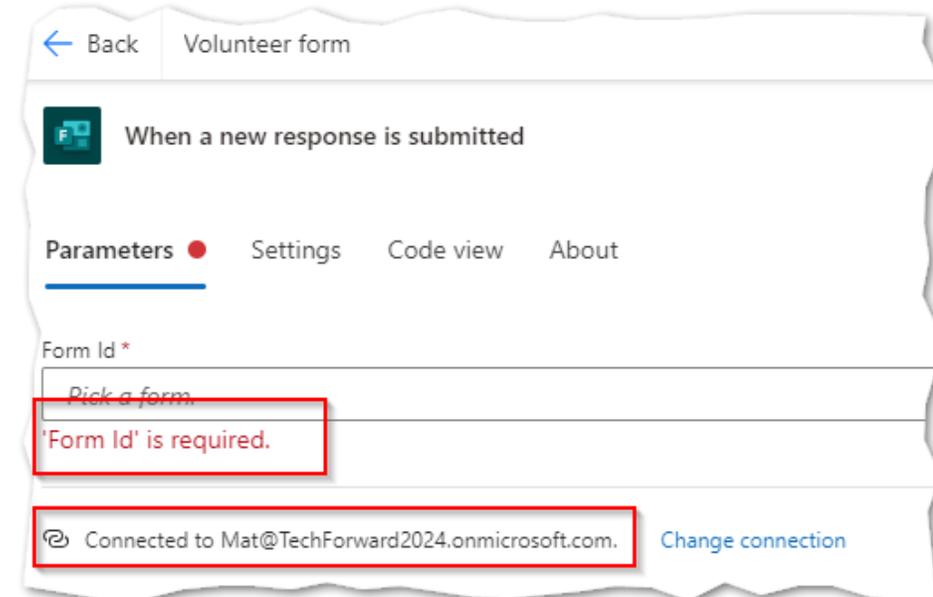
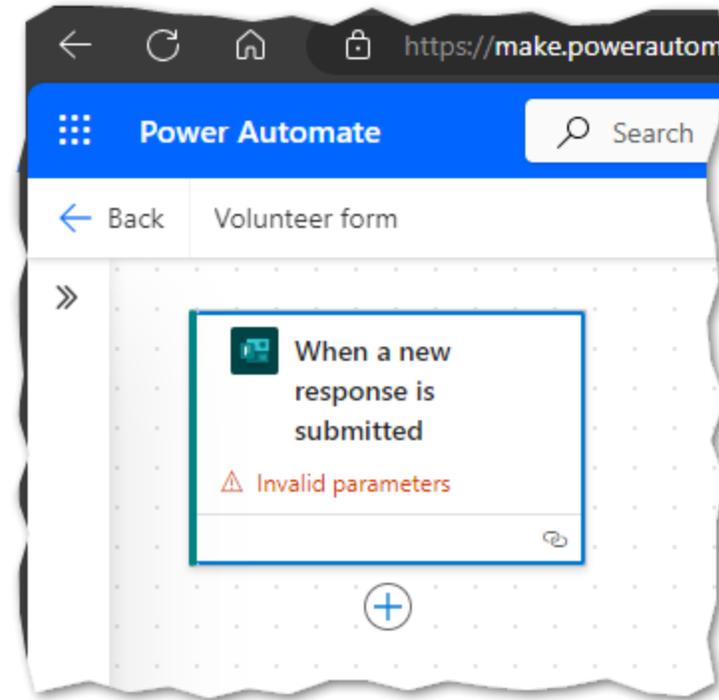
- Name your workflow
- Note the first available trigger is the one we are going to use.
- Take a moment to search and explore other triggers, such as “SharePoint”.
- Select the trigger for “When a new response is submitted – Microsoft Forms”

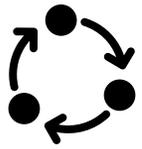




We add a trigger so Power Automate knows when the form is filled out.

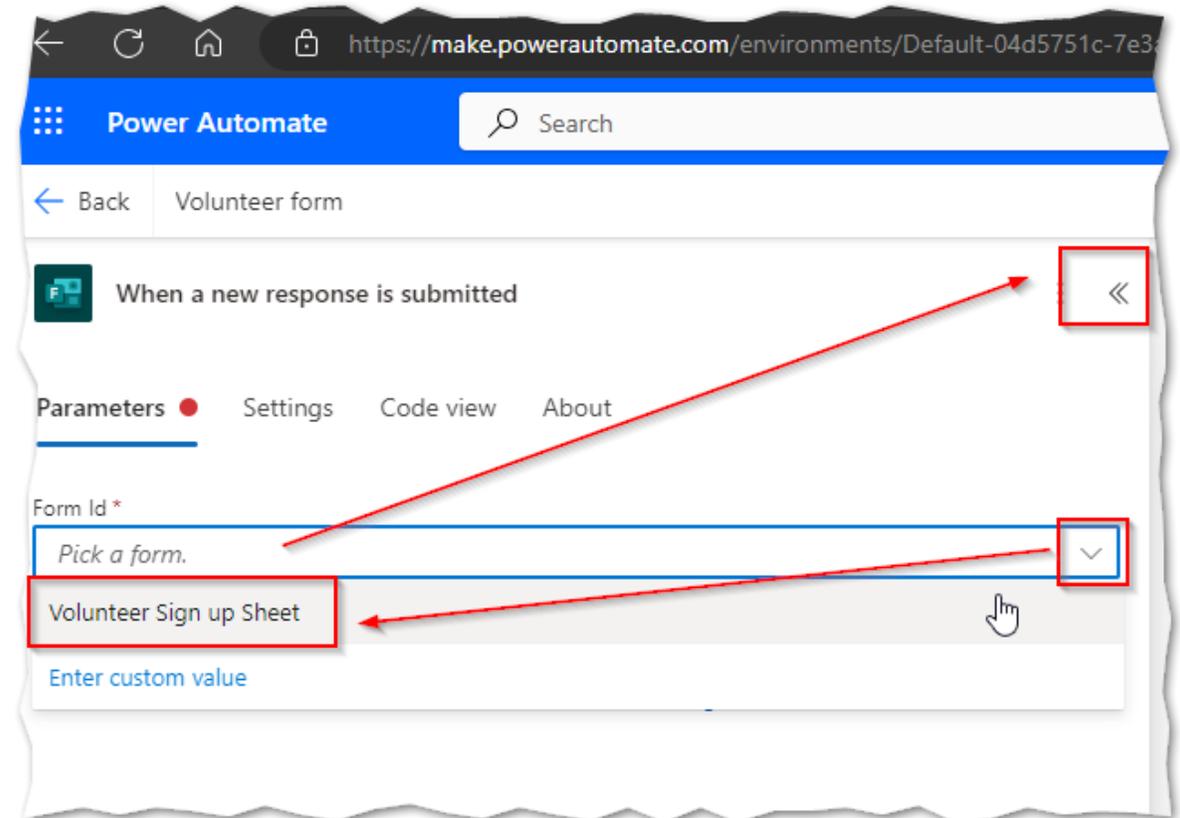
- It may ask you to log in when it automatically creates the Microsoft Forms connector.
- You will see a warning because we have not selected the form for the trigger yet.
- Otherwise, you can see at the bottom what connector it is using.

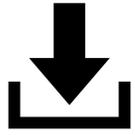




We add a trigger so Power Automate knows when the form is filled out.

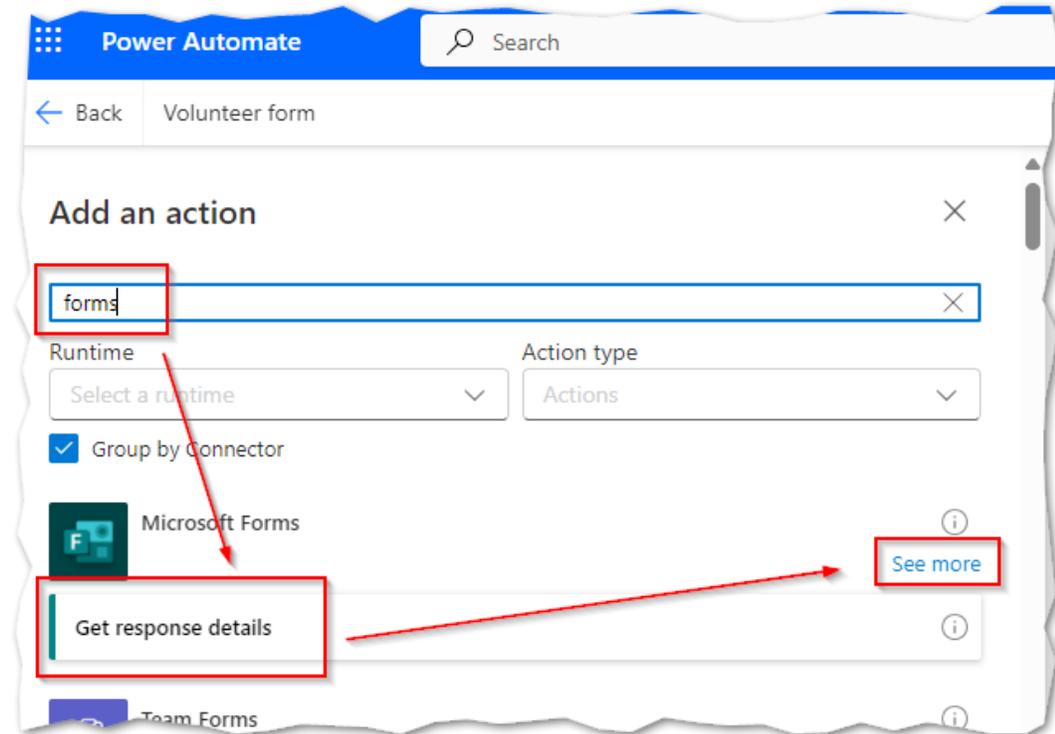
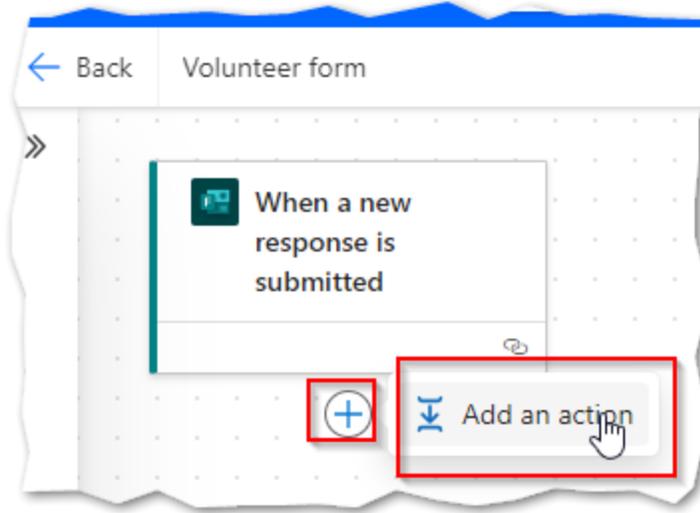
- Click the down arrow and select the form we already created.
- Then click the double left arrows to hide this details pane.
- Next, we will add an action!

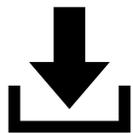
A screenshot of the Power Automate web interface. The browser address bar shows "https://make.powerautomate.com/environments/Default-04d5751c-7e3...". The page title is "Power Automate" with a search bar. Below the navigation bar, the current flow is named "Volunteer form". The main content area shows a trigger step: "When a new response is submitted". Below the trigger, there are tabs for "Parameters", "Settings", "Code view", and "About". The "Parameters" tab is active, showing a "Form Id \*" field. A dropdown menu is open, showing "Pick a form." and "Volunteer Sign up Sheet". A red box highlights the "Volunteer Sign up Sheet" option. Another red box highlights the double left arrow icon in the top right corner of the details pane. A red arrow points from the dropdown menu to the double left arrow icon.



Power automate  
collects the  
populated form  
information

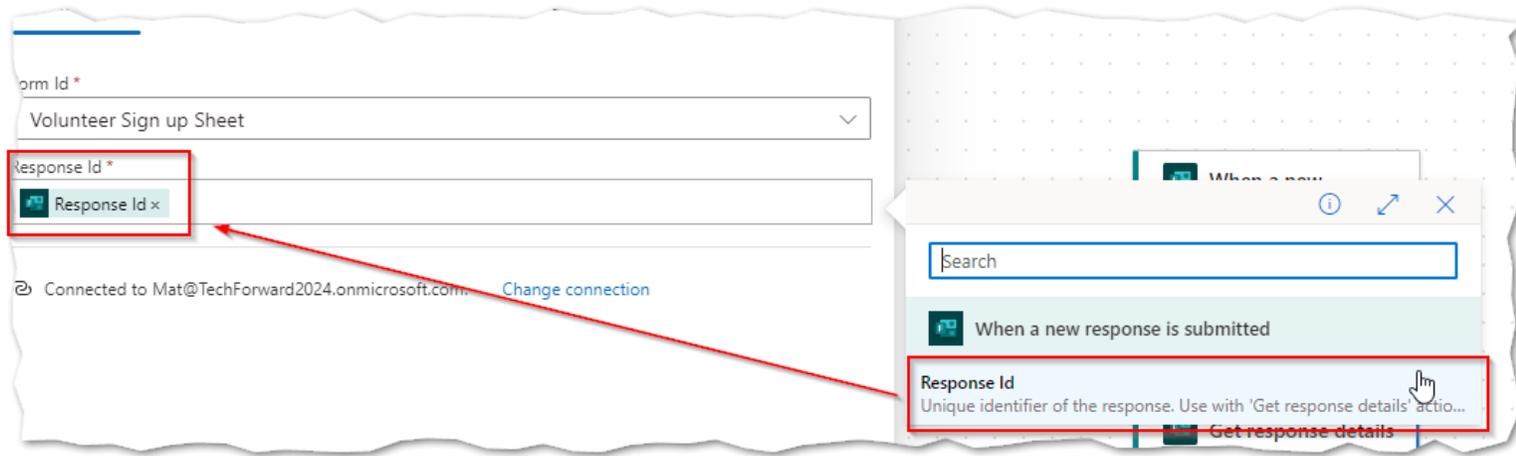
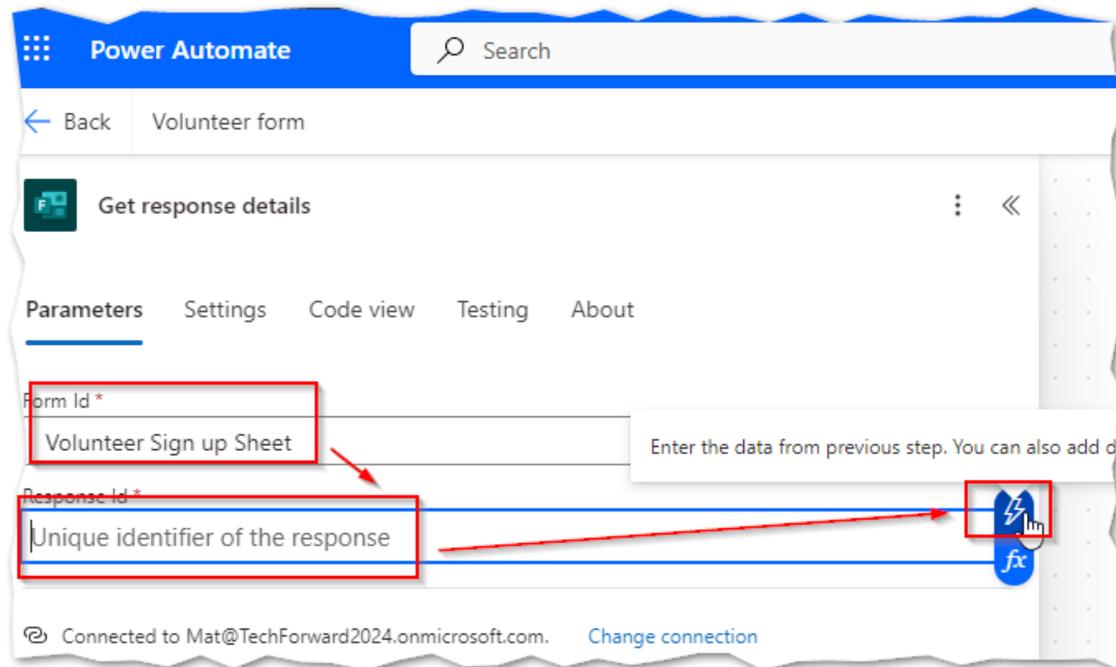
- Click the plus sign to add an action
- Search for Forms related actions
- Note the “see more” option.
- Search for and explore other actions.
- To continue Select “Get response details” in the form action results.

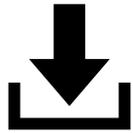




Power automate collects the populated form information

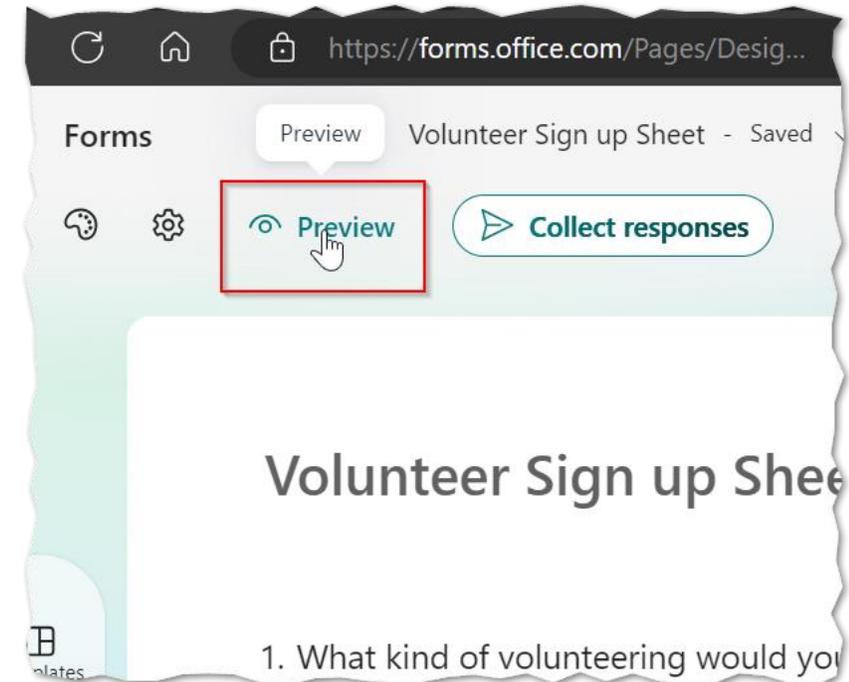
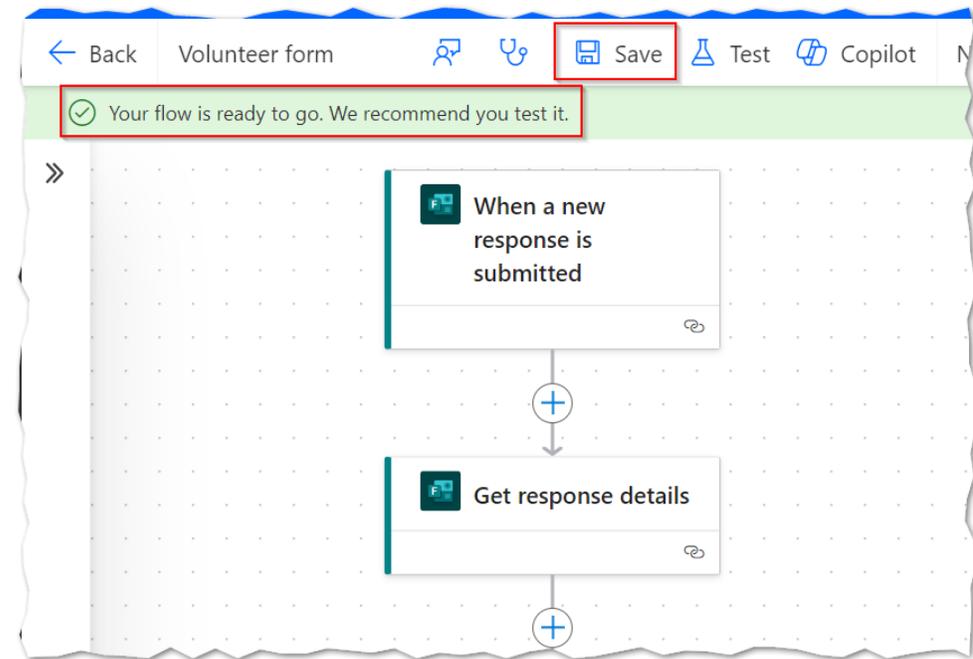
- Select our form again
- Click the “lightning bolt”
- Select the response ID from our trigger.

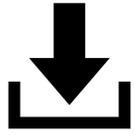




Power automate  
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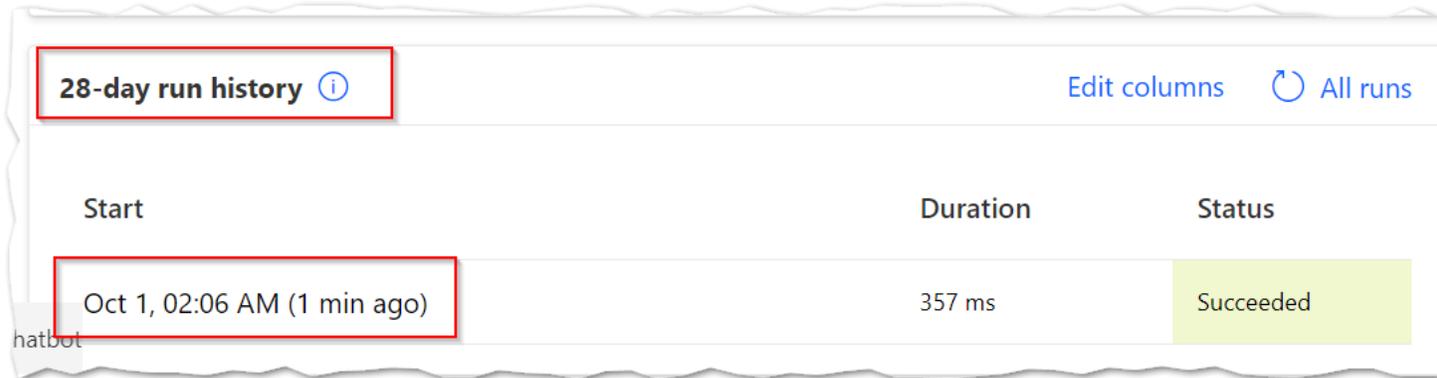
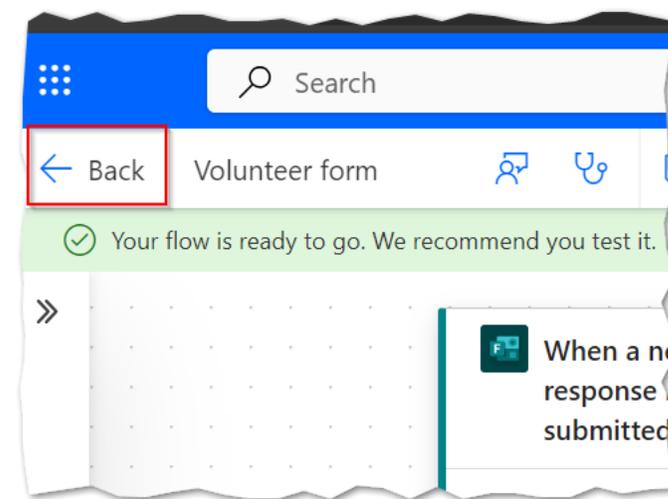
- With a trigger and at least one action, we can save.
- Save often! Create copies as backups throughout your exploration.
- Go back to your form, click preview, and submit a test form submission.
- (Take note of what response you chose, i.e. "working with food banks.")



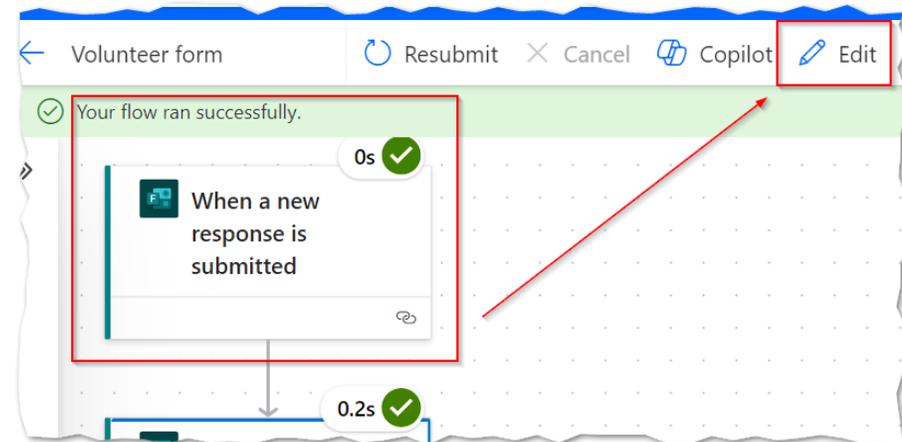


Power automate  
collects the  
populated form  
information

- Go back to Power Automate
- Click the Back arrow
- See the run history
- Note “Resubmit”.
- Click on the recent run
- You can click on each box to review the specific results.
- When done, click on “Edit” to keep adding more actions.

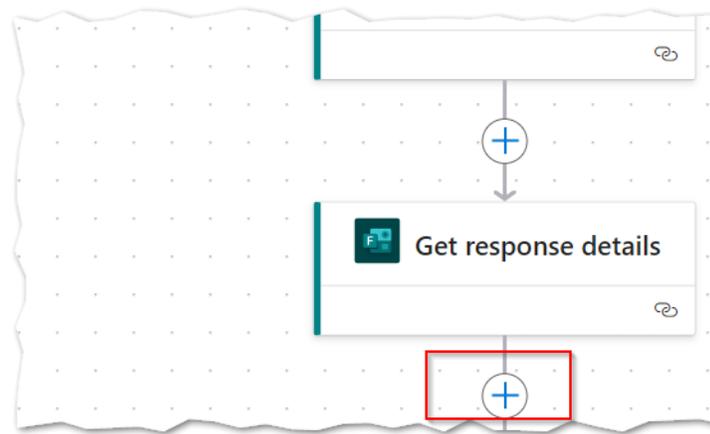


Start	Duration	Status
Oct 1, 02:06 AM (1 min ago)	357 ms	Succeeded

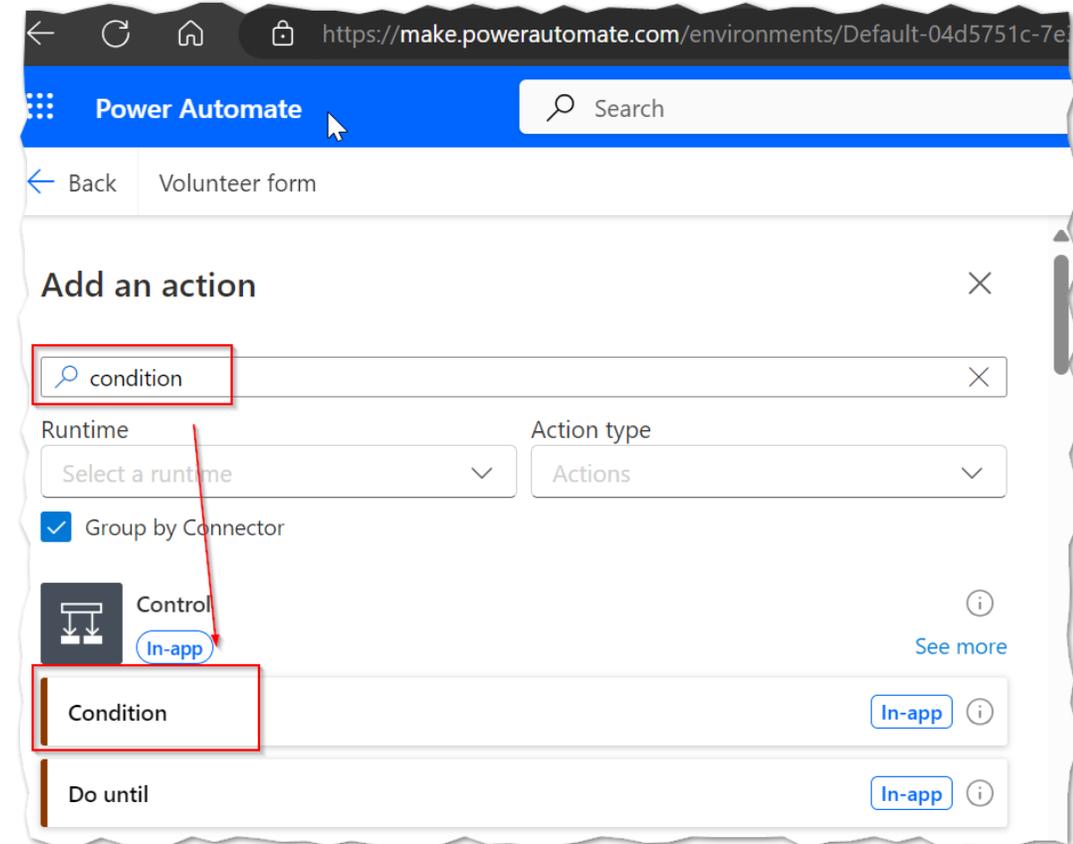




Power Automate sends an email to different people based on the information.



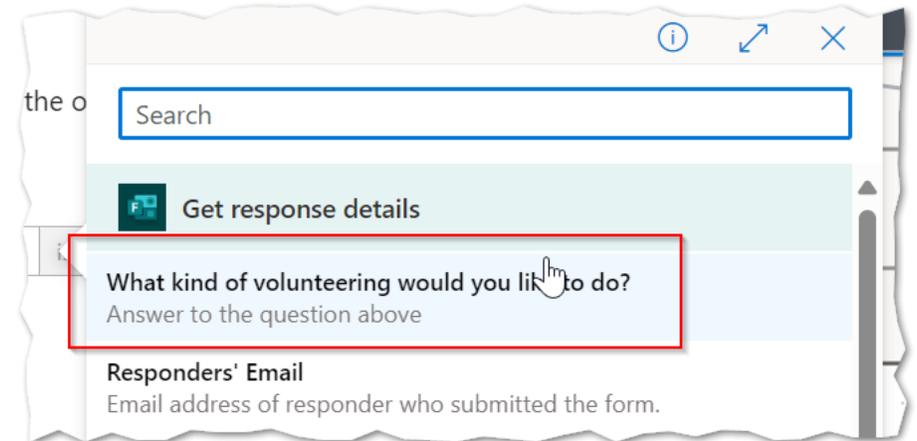
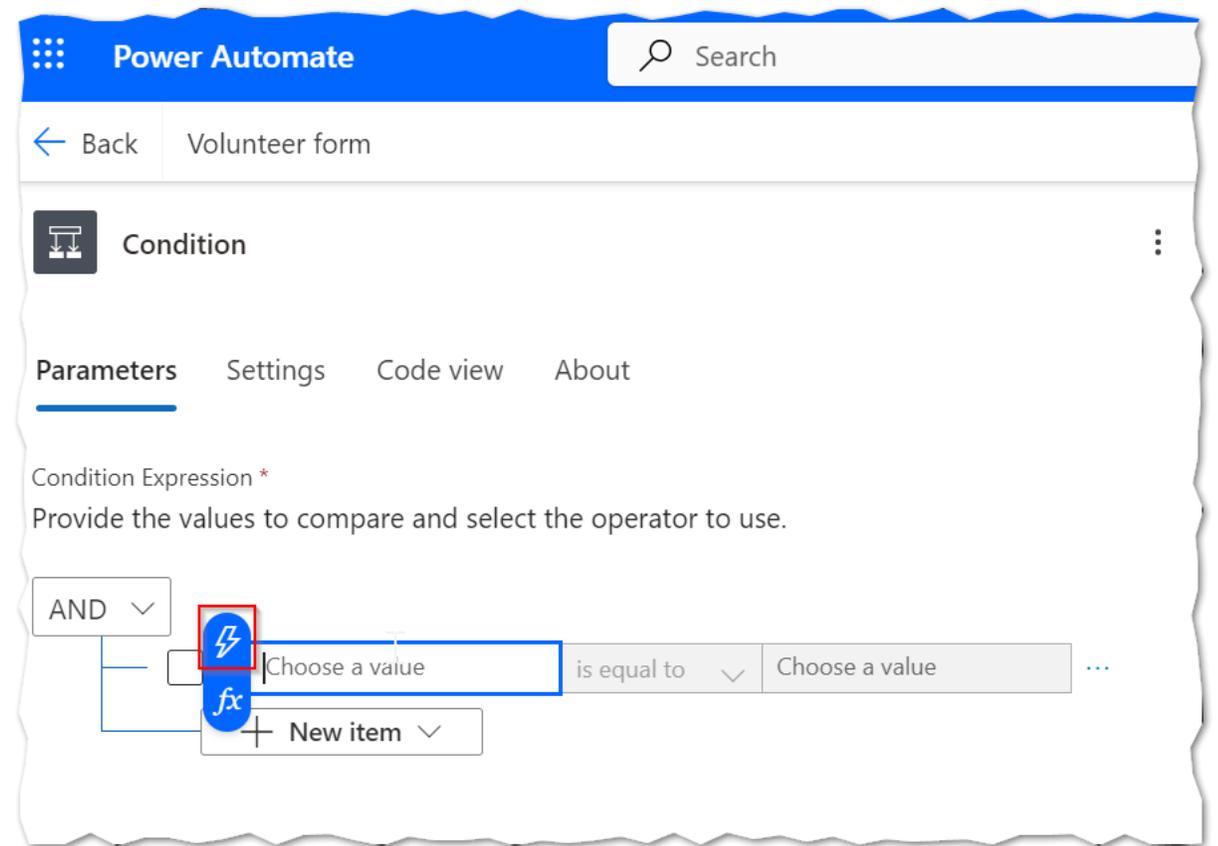
- Now we add another action to our workflow.
- Click the plus after our “Get response details” action
- Search for “Condition”
- Select the “Condition action”.





Power Automate sends an email to different people based on the information.

- Build the logic for who need to get an email based on the form response.
- Click the 'Lightning bolt' so we can tell it what question we want to use
- Select the same question we used when we submitted a form preview earlier.





Power Automate sends an email to different people based on the information.

- Go back to your form and select the answer to the question.
- Copy the answer so we can add it to our condition.
- This needs to be spelled and have the same case so copy and paste is recommended.

## Volunteer Sign up Sheet

1. What kind of volunteering would you like to do?

Enter a subtitle

Working with food banks

### Condition

Parameters Settings Code view About

Condition Expression \*

Provide the values to compare and select the operator to use.

AND

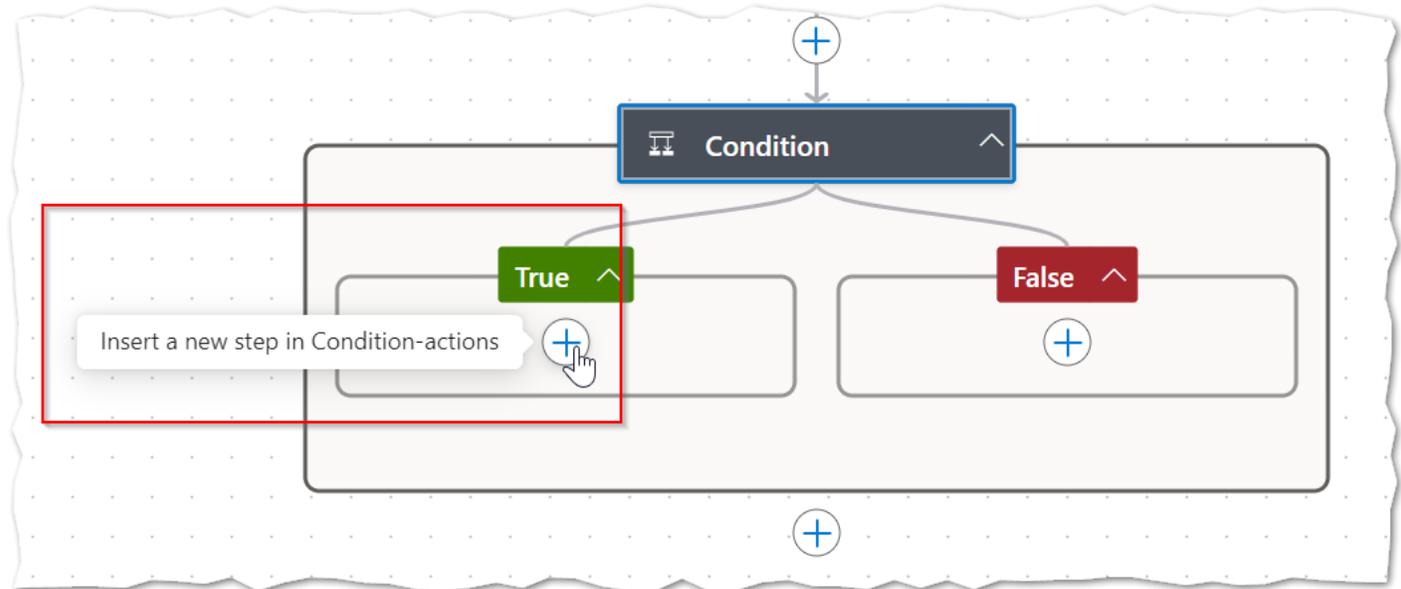
What kind of volu... × is equal to Working with food banks

+ New item



Power Automate sends an email to different people based on the information.

- Click the plus sign inside the “True” branch.
- Search for the Office 365 Send Email Connector.
- It may require you to sign in to create the Connection.



### Add an action

Search for 'email' in the connector list. The 'Office 365 Outlook' connector is selected, and the 'Send an email (V2)' action is highlighted.

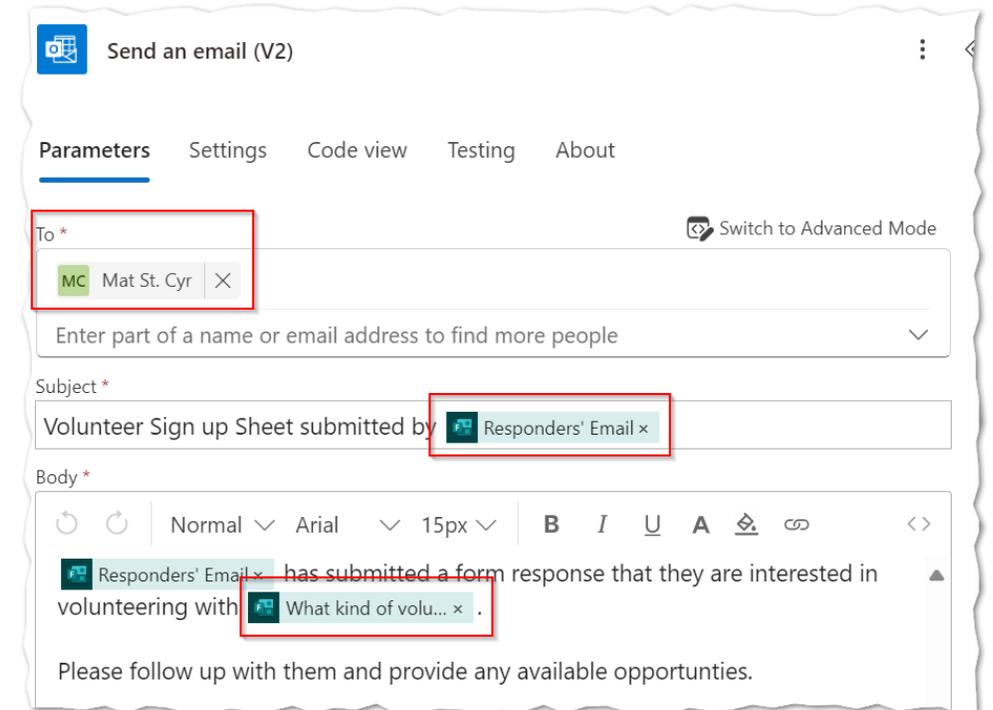
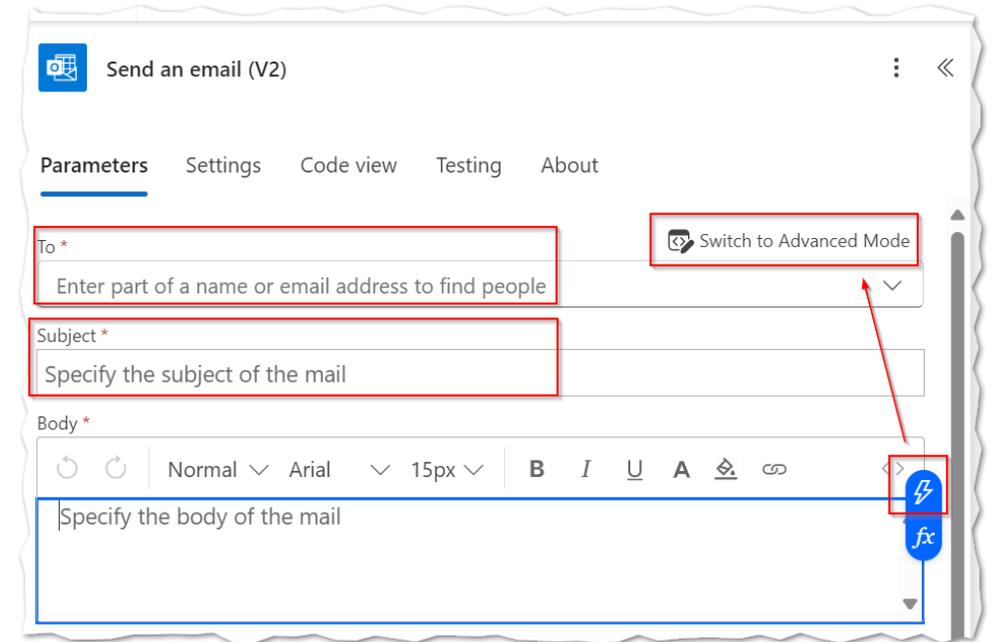
### Create connection

The 'Send an email (V2)' action is selected. A 'Sign in' button is visible at the bottom right, indicating that a connection must be established.



Power Automate sends an email to different people based on the information.

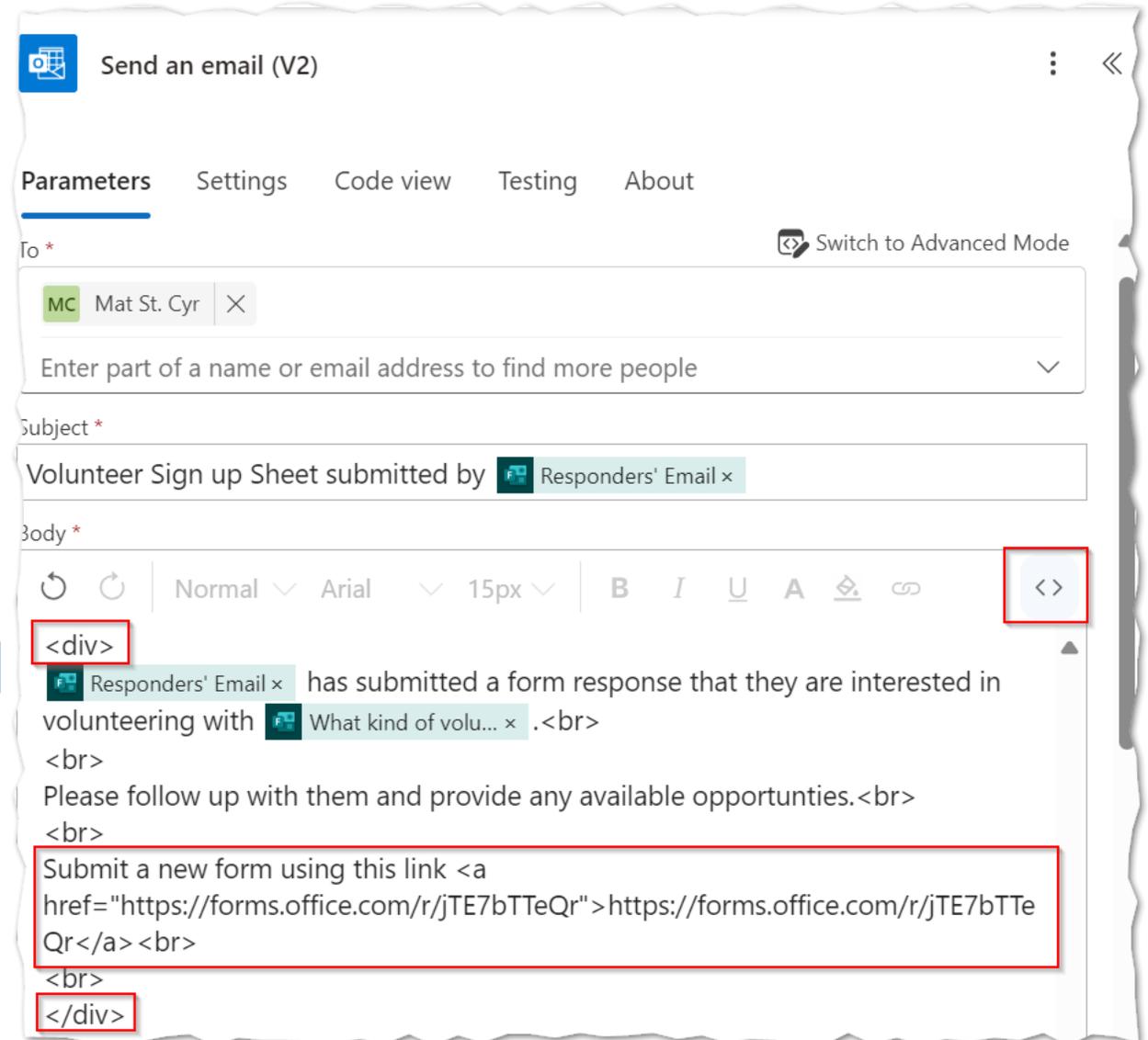
- The “Dynamic Content” can be added to any of these fields.
- You could add the requestor to the TO field
- You could add all sorts of details to the body.
- What if you want HTML?





Power Automate sends an email to different people based on the information.

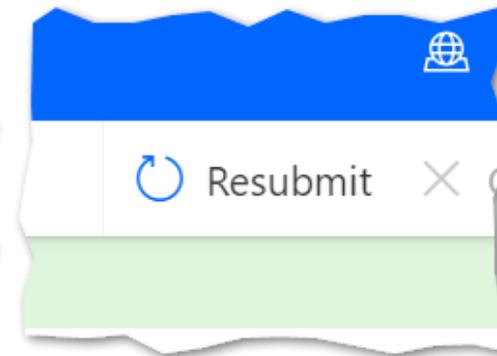
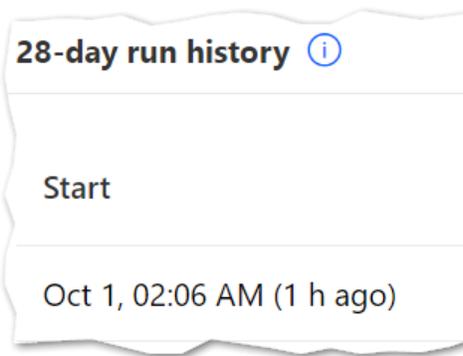
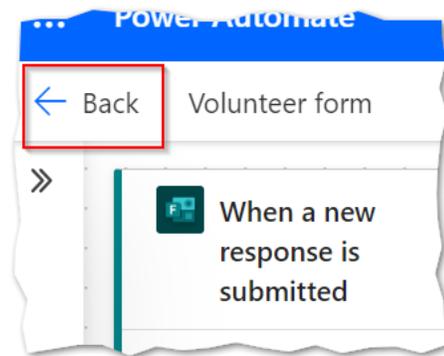
- You can click the “Toggle Code View” button
- Make sure you add the `<div>` and `</div>` open and closing tags
- I added a link to our form (this is optional and just for demonstration purposes.)
- Next, Lets test it!



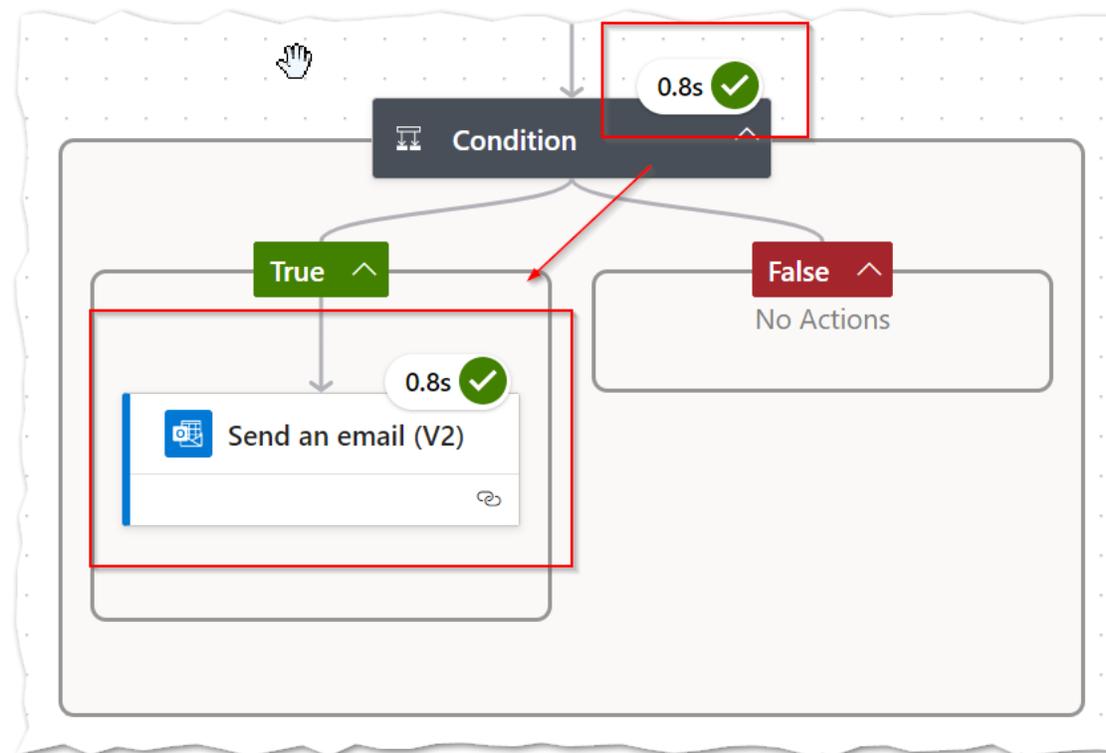
The screenshot shows the 'Send an email (V2)' connector in Microsoft Power Automate. The interface is in 'Code view' mode, as indicated by the 'Code view' tab being selected in the top navigation bar. The 'Parameters' tab is also visible. The 'To' field contains a contact named 'Mat St. Cyr'. The 'Subject' field contains the text 'Volunteer Sign up Sheet submitted by Responders' Email'. The 'Body' field is in code view, showing HTML content. A red box highlights the opening `<div>` tag at the start of the body content. Another red box highlights the closing `</div>` tag at the end of the body content. A third red box highlights a link within the body content: `<a href="https://forms.office.com/r/jTE7bTTeQr">https://forms.office.com/r/jTE7bTTeQr</a>`. The body content includes a greeting, a message about a form submission, and a request to follow up with the respondent. The 'Toggle Code View' button, represented by a double arrow icon, is highlighted with a red box in the top right corner of the body editor.



Power Automate sends an email to different people based on the information.



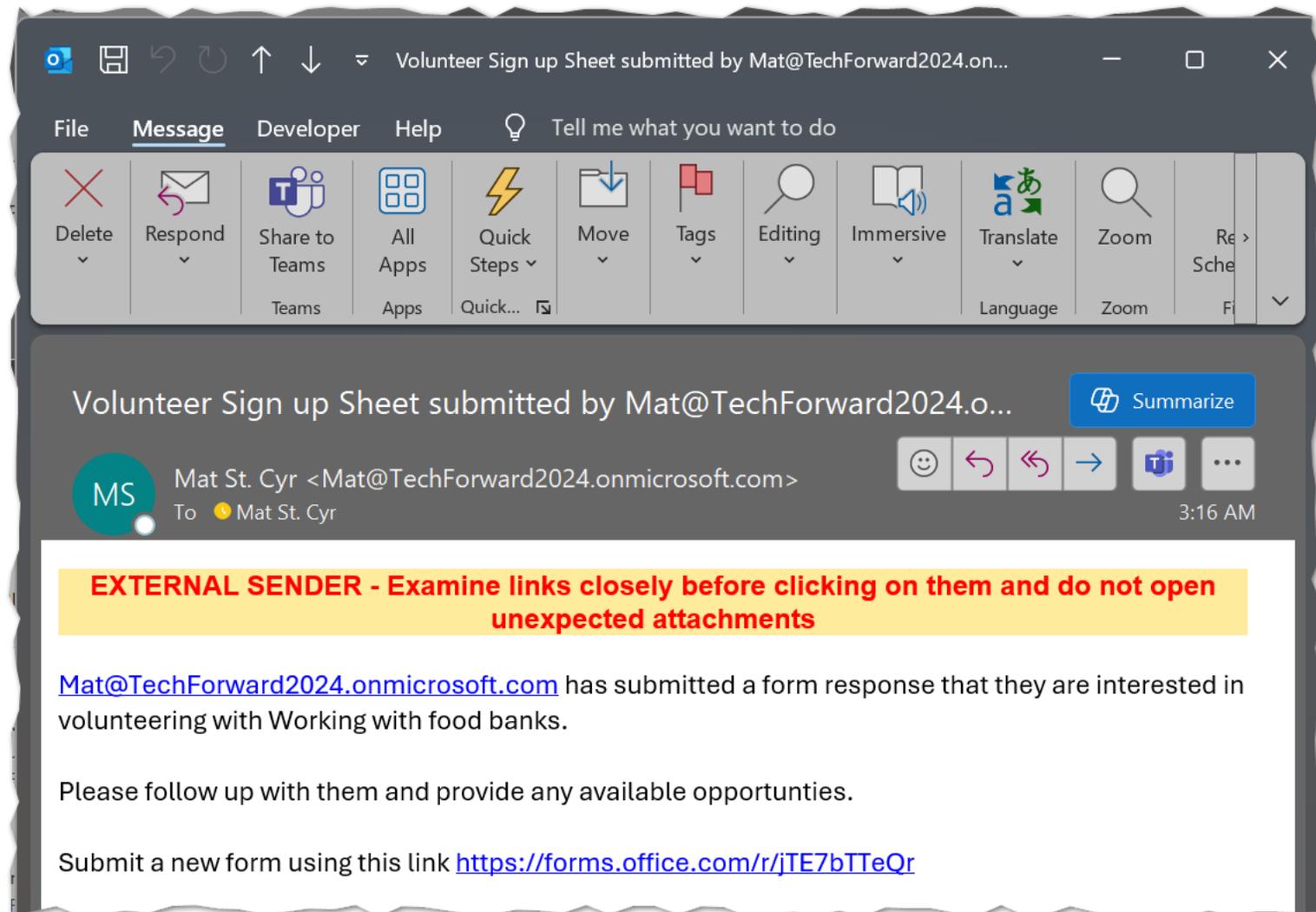
- Click Back to go back to your run history.
- Click on Re-submit
- You can see our logic successfully ran through the "True" condition.
- Bonus: Submit a new form and select a different option. Then review your run history and see if the new run went down the False branch.





Power Automate sends an email to different people based on the information.

- Now we can see what this response looks like.
- The send email v2 connector has all sorts of other options, such as send on behalf, etc.
- Some advanced email connectors require premium subscription.



# What else can we do?

- Keep adding other “conditions” for the other answers on our form with a customized email response for each.
- Add another email to the requestor thanking them?
- Have an auto reply that has a scheduling link for the resource specific to their volunteer interest?
- Use “Send email with Options” so the manager can review the form details and approve or deny the request before a scheduling link is sent out (Premium)
- Allow the volunteer to upload files with the form, and store and manage those included files in SharePoint or Teams
- Use the AI describe and build, how close can it get now that we know how this “should” work?



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# DO YOU NEED HELP?

Use this QR code to submit a request with some details.

- Power Automate, Power BI, Power Apps, Azure, many other Microsoft services.
- Sunset legacy applications and automation, building new ones.
- Extended support for existing or new solutions.
- Training and education, increase user adoption.
- Let's just chat and see how we can help!



<https://forms.office.com/r/xH04cyGmLZ>