

THREE FLOWS TO SUPERCHARGE SALES

Presented by Brian Begley - bbegley@encloudg.com

But first a little bit about us.....

Microsoft
Partner | Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions



DYN 365
SUPPORT

About enCloud9

- Dynamics 365 Cloud Customer Relationship Management – Silver 2014 - present
- 15 years experience working with small to mid-sized businesses to modernize sales, marketing, and customer service
- Work with companies throughout the US and Canada
- Primary focus is on Cloud-based Dynamics 365 Customer Engagement Platform

About Dynamics365Support.com

- Premier provider of low-cost fixed fee support services for Dynamics 365, PowerApps, and Flow

ABOUT POWER AUTOMATE

Workflow automation tool like Zapier or
ITTT

Links Dynamics 365 with hundreds of
other external services – Not just
Microsoft services!

Useful for

- Replacing Standard CRM Workflows
- Syncing Data to/from external sources
- Approvals/Notifications
- And MORE!

Recently added connectors



SignRequest

PREMIUM



Short URL

PREMIUM



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EXPOCAD

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Telephony Xten...

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D7SMS

PREMIUM



Jexghts gen. Do...

PREMIUM

All connectors



Office 365 Out...



SharePoint



OneDrive for B...



Microsoft Forms



Planner



Microsoft Teams



Common Data ...

PREMIUM



Outlook.com



RSS



SQL Server

PREMIUM



Power BI



Azure DevOps

PREMIUM



OneNote (Busi...



Notifications



Office 365 Users



Google Calendar



Approvals



Twitter



Excel Online (B...



Dynamics 365

PREMIUM



Mail



Microsoft To-D...



Gmail



MSN Weather



Flow #1 – Weekly email of Won Opportunities

- Every week, an email is delivered to let you know about closed opportunities and revenue
- This prebuilt template can be easily added into your solution
- <https://us.flow.microsoft.com/en-us/collections/sales/>
- Modify the Flow to email case closings, lead qualification, or any other data

The screenshot displays a Microsoft Flow process and the resulting email. The flow consists of the following steps:

- Recurrence
- Get past time
- List records 2
- Apply to each
- Create HTML table
- Get my profile (V2)
- Send an email

The email preview shows the following content:

Let's Celebrate! It's Wins-Day

This message was sent with Low importance

Brian Begley
Fri 2/21/2020 3:46 AM
Brian Begley

Hi Brian Begley,

Let's Celebrate! It's Wins-Day !

Created On	Close Date	Name	Revenue
2019-11-08T19:27:01Z	2020-02-20	Needs to restock their supply of Product SKU AX305; will purchase at least 25-50 (sample)	34800
2020-02-21T04:13:34Z	2020-02-20	test opportunity	100000

Flow #2 – Opportunity Approval

- Approval flows are great for keeping people in the loop about data changes in Dynamics Sales
- Use them to monitor sales discounts, credit limit changes, and new clients
- <https://us.flow.microsoft.com/en-us/collections/sales/>
- Modify the Flow to email case closings, lead qualifications, or any other data

The screenshot shows a Microsoft Flow configuration for "When a new opportunity is won". The flow starts with a trigger "When a new opportunity is won" with filters for "Organization Name" (enCloud9 Demo) and "Entity Name" (Opportunities). This is followed by a condition "Check if opportunity won" where "Status Label" is "is equal to" "Won".

The flow branches into two paths:

- If yes:** A "Get my profile (V2)" action is followed by a "Send an approval to Sales Manager" action. The approval action is configured with:
 - Approval type: Approve/Reject - First to respond
 - Title: Approve a NEW Opportunity Win - Topic
 - Assigned to: bbegley@encloud9demo.onmicrosoft.com
 - Details: Opportunity: Topic, Revenue: Actual Revenue
 - Item link: Topic
 - Item link description: Please approve the opportunity here
- If no:** This path is currently empty.

The "Respond" dialog box shows the following information:

- Overview:**
 - Approval: Approve a NEW Opportunity Win - test opportunity
 - Requester: Brian Begley
 - Received: Feb 20, 11:01 PM (12 h ago)
 - Link: Please approve the opportunity here
- Details:**
 - Opportunity: test opportunity
 - Revenue: 100000
- Choose your response: (dropdown menu)
- Add a comment (optional): (text area)

Flow #3 – Send text messages to your contacts

- Let your clients know about special deals, shipping dates, or resolved cases with a simple SMS message
- This Flow uses a Twilio connector to send text messages
- A custom SMS activity is added to Dynamics 365
- Extend the Flow with the ability to receive SMS from customers

The image displays a Microsoft Flow canvas on the left and a mobile phone screen on the right. The flow canvas consists of four steps:

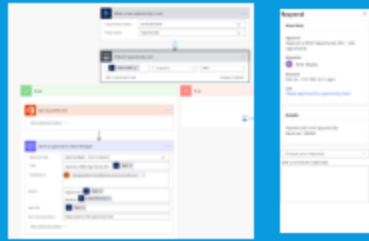
- When an SMS Message record is created and saved:** Trigger condition is 'Create', entity name is 'SMS Messages', and scope is 'Organization'.
- Update a record:** A purple step to update the record.
- Send Text Message (SMS):** A red step with fields for 'From Phone Number' (SMS Number), 'To Phone Number' (Phone Number x), and 'Text' (Subject x).
- Update SMS Record with Twilio Status:** A purple step to update the record with Twilio status.

Buttons for '+ New step' and 'Save' are visible at the bottom of the flow canvas. The mobile phone screen on the right shows a text message from 'Brian' with the content: 'Brian - Call me about that Skidsteer - I can get you a deal if we close by February 29!'.

Next steps and

Flow #2 – Opportunity Approval

- Approval flows are great for keeping people in the loop about data changes in Dynamics 365.
- Use them to monitor sales discounts, credit limit changes, and new checks.
- [View the full video](#)
- [View the full video](#)
- Modify the flow to email case closings, lead qualifications, or any other data.



Contact us at [enCloud9/Dynamics365](https://encloud9.com) support with any questions
support@encloud9.com

Sign up for our March 20 webinar –
Best of the April 2020 Power Apps and Dynamics 365 Update

Resources

Power Automate Home Page
<https://us.flow.microsoft.com/en-us/>

Flow Templates
<https://us.flow.microsoft.com/en-us/templates/>

Learning Resources and FREE Training
<https://docs.microsoft.com/en-us/learn/powerplatform/>