Power Automate – Dataverse Cheatsheet

DESCRIPTION

Greater than, Greater than or equal, Less than, age gt 35

Comma-separated list of columns names to trigger the

Description

Equal, Not Equal

And, Or, Negation

Grouping

String contains

String ends with

String starts with

Sample

firstname ne null

Not available

birthdate eq 2022-01-15T**00:00:00Z**

birthdate eq 2022-01-15T10:30:00Z

@equals(triggerOutputs()?['body/_educationcode_label'], 'Pr

educationcode eq 100000002

annualincome eg 345000

_customer_value ne null

entityimageid ne null

The user who owns the

If a record is owned by a

team, then this option

falls back to run as the

The user that updated

the record.

@equals(triggerOutputs()?['body/_educationcode_label'], 'Primary')

Email – To be able to select a user within your organization.

Number – Integer and Decimal numbers will work.

Use Expressions in conditions

_parentcustomerid_value ne null

description eq 'Those are my notes.'

Default. The user who

When a row is added, modified or deleted ...

Text – That can be converted into a "drop-down list of options" or a "multi-select list of options"

and, or, not

Whole Number

Choice (value)

Choice (Label)

Choices

Currency

Image

Lookup (value)

Lookup (type)

Multiple Text

Secure Outputs of the operation and ref

Type Default

Customer (value)

Customer (type) Decimal Number

Floating Point Number

Actions are taken on rows owned

by anyone in your business unit.

Actions are taken by anyone within

owned by anyone in your business

Actions are taken on rows owned

unit or a child business unit.

Delay the flow trigger until a specific UTC time.

2022-03-25T15:00:00Z or dka_processstartfield

firstname eq 'Dani' and age ne null

contains(firstname,'ani')

endswigth(firstname,'ni')

startswith(firstname,'da')

Modifying user

Use invoker's connection

You can create flows that trigger based on a Dataverse

Catalog – used to organize and manage Dataverse

Category – used as a sub-classification within a

Table name – used to filter the available actions by

their associated table (bound actions), or to filter

global actions (unbound actions). For unbound

Action name – used to identify the action that

of available actions is filtered by the catalog,

triggers the flow each time it runs successfully. The list

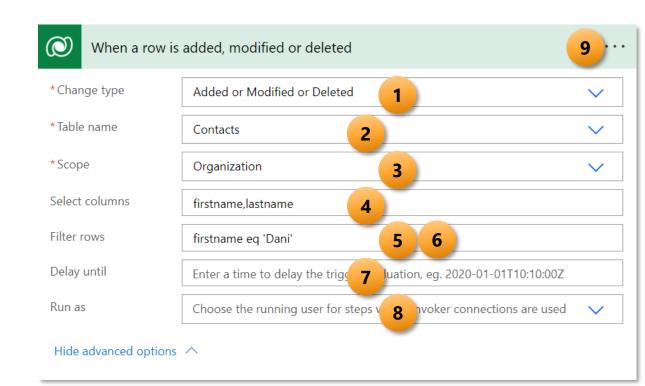
actions, select (none).

category, and table name.

Sample

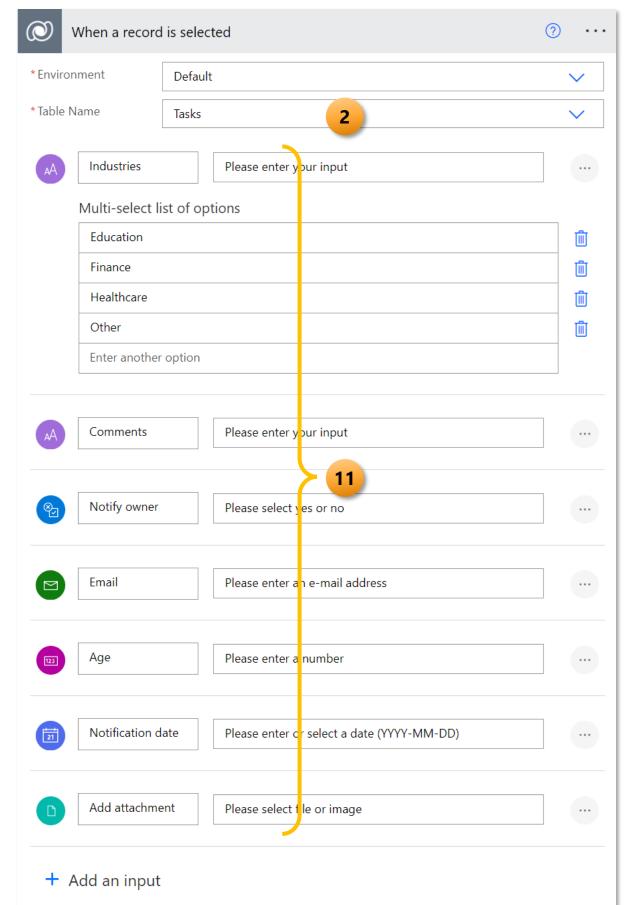
firstname eq 'Dani' firstname ne null

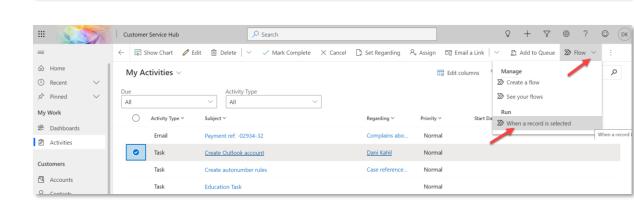
TRIGGERS



n is performed (preview) 10	
Microsoft Dataverse Common	~
Activity Tables	~
email	~
GrantAccess	~
	Microsoft Dataverse Common Activity Tables email

TRIGGERS from Dataverse (legacy)





ACTIONS

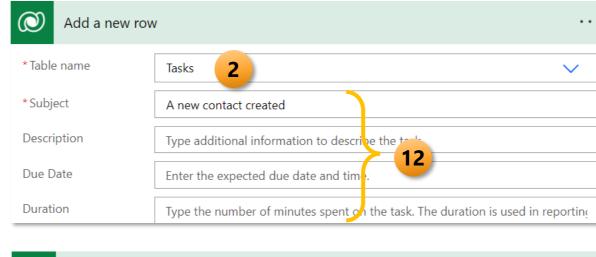
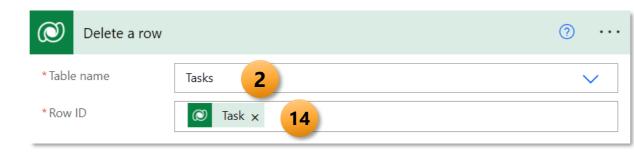
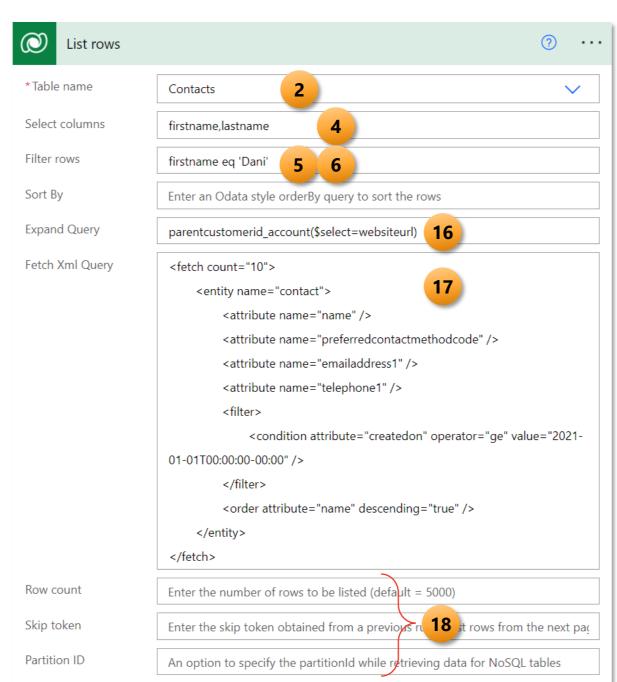


Table name	Email Messages		\
Activity Party Attr	ibute		
То		~	
Activity Party Attr	ibute 13		
contacts(Contact ×)		
+ Add new			



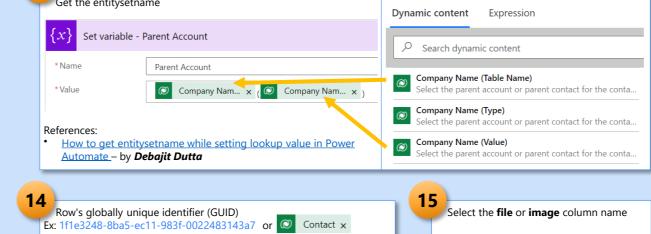
O Download a file	or an image	?
*Table name	Tasks 2	
*Row ID	Task × 14	
*Column name	PA File 15	•
Image size	PA File	
	PA Image	
Hide advanced options	Enter custom value	

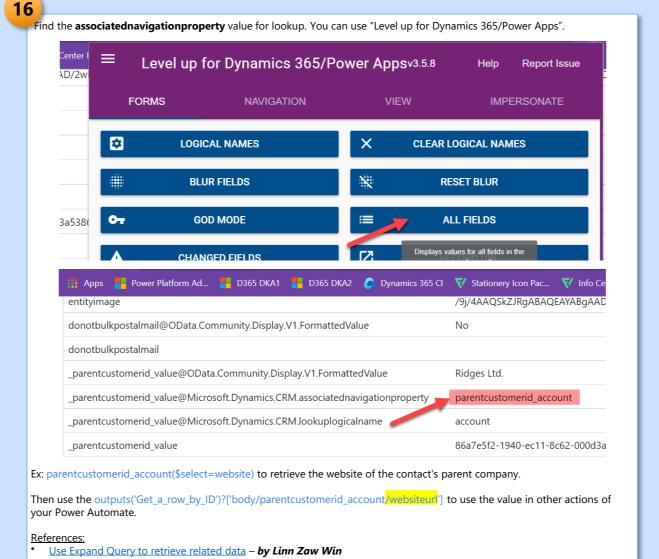
Get a row k	
* Table name	Contacts 2
* Row ID	00f291c1-7479-ec11-8d21-000d3a554ca0 14
Select columns	firstname,lastname 4
Expand Query	parentcustomerid_account(\$select=websiteurl) 16
Partition Id	An option to specify the partitionId while retrieving data for NoSQL tab

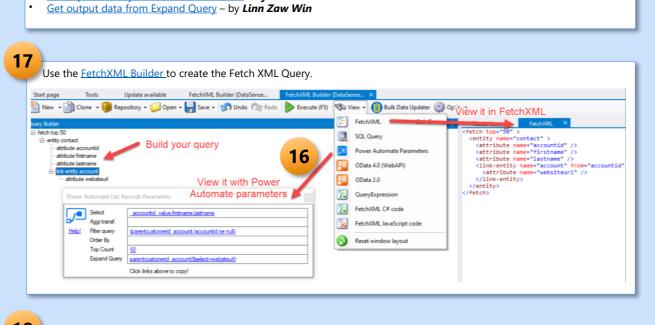


DESCRIPTION

Data Type	Sample	Comments
Text	New contact created	
Whole Number	25	
Date	2022-01-15T 00:00:00Z	For Date only field, you still need to set the time 00:00:00Z
Date Time	2022-01-15T10:30:00Z	Date time in UTC Time
Choice Choice (lable)	Select an option or 509180000 triggerOutputs()?['body/_educationcod e label']	Select an option from the provided list in Power Automate OR use the choice value (Ex: 50918000
Choices	Select an option or 509180000,509180001,509180006	You can only choose 1 option from the provided Power Automate. For multiselect, you can set the choice values sep by a comma. (Ex: 509180000,509180001,5091800
Currency	1000	
Customer (value)	Contacts(00f291c1-7479-ec11-8d21- 000d3a554ca0)	Use the EntitySetName followed by the record Gl enclosed in parentheses.
Decimal Number	12.30	
File	Not available	Use the Upload a file or an image action instead
Floating Point Number	12.30	
Image	<i>fx</i> base64() ×	Convert any file to base64
Lookup 13	Contacts(00f291c1-7479-ec11-8d21- 000d3a554ca0)	Use the EntitySetName followed by the record Glenclosed in parentheses.
Multiple Text	This is a long text	If using the rich text editor , you can insert your the HTML format.
	this is a long text	THE IOIIIdt.
Yes/No	Select an option or fx true x	Select an option or use the True or False expressi Power Automate
3		

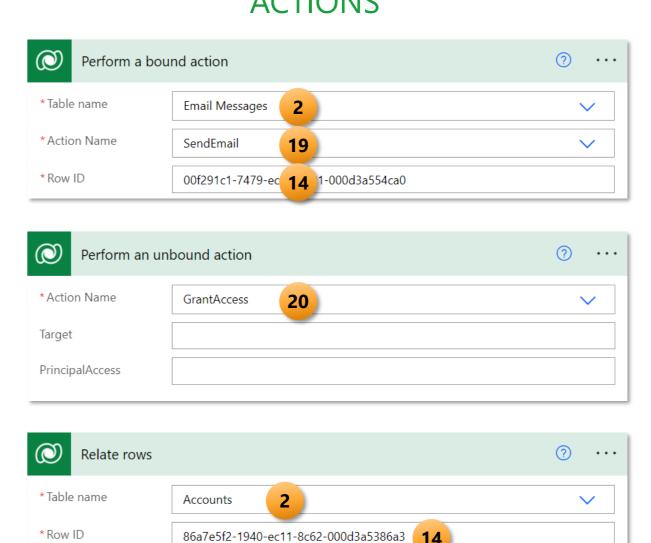


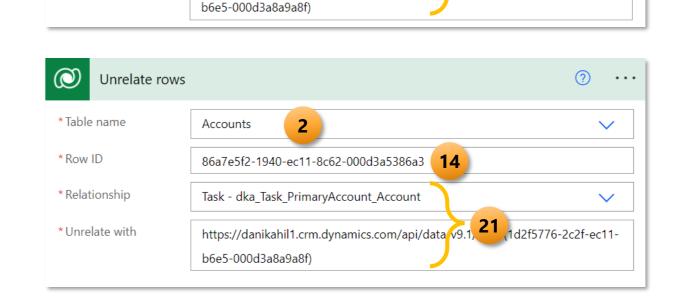




Parameter Name	Description
Row count	Use to indicate the specific number of rows for Dataverse to return. Here's an example that shows how to request 10 rows.
Skip token	Use to handle paging manually with the Skip Token parameter.
Partition ID	An option to specify the partitionId while retrieving data for NoSQL tables. To learn more, see Improve performance using storage partitions when accessing table data.

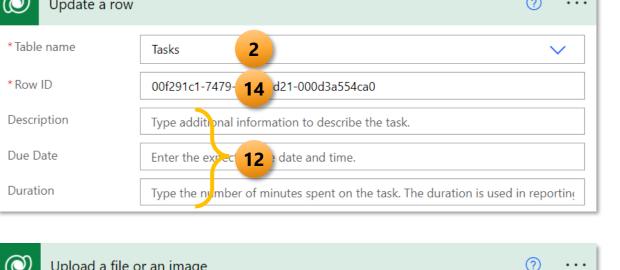
ACTIONS

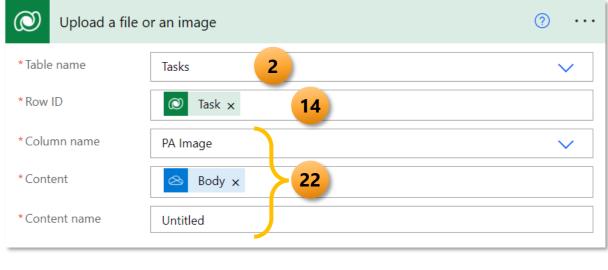




https:// .crm.dynamics.com/api/data_v9.1/t___s(1d2f5776-2c2f-ec11-

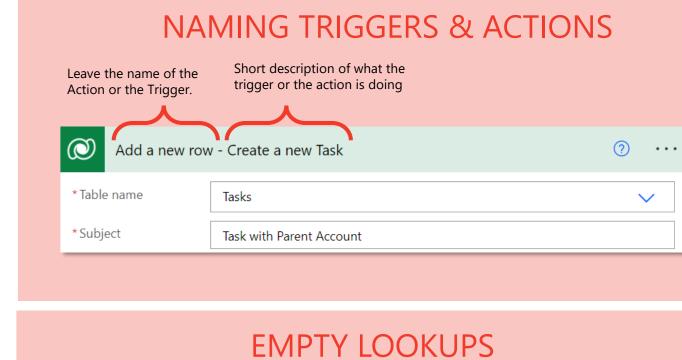
Task - dka_Task_PrimaryAccount_Account







Search rows (p	review) 24	
*Search term	Dani	l
Search type	Enter whether simple or full search syntax should be used (default is simple)	l
Search mode	Enter whether any or all of the search terms must be matched (default is any)	ı
Row count	Enter the number of search results to be listed (default = 50)	



DESCRIPTION

Bound actions target a single table or a set of rows from a Unbound actions aren't bound to a table and are called as

Choose the relationship from the available options

Use the Search rows action in flows to retrieve data from Microsoft Dataverse by using keywords and Dataverse search, which

https://[environment].crm.dynamics.com/api/data/v9.1/[tablenames](GUID)

Use the format:

Choose the column with the file of the

Specify the file or image content on

Specify the name and file extension for the file otherwise it will appear as

binary or base64 format.

"Untitled" on your form.

delivers fast, intelligent, and comprehensive results across tables in Dataverse.

Relationship

Column name

<u>Use Dataverse search to retrieve rows</u>

Relate with

static operations. Unbound actions are performed on the

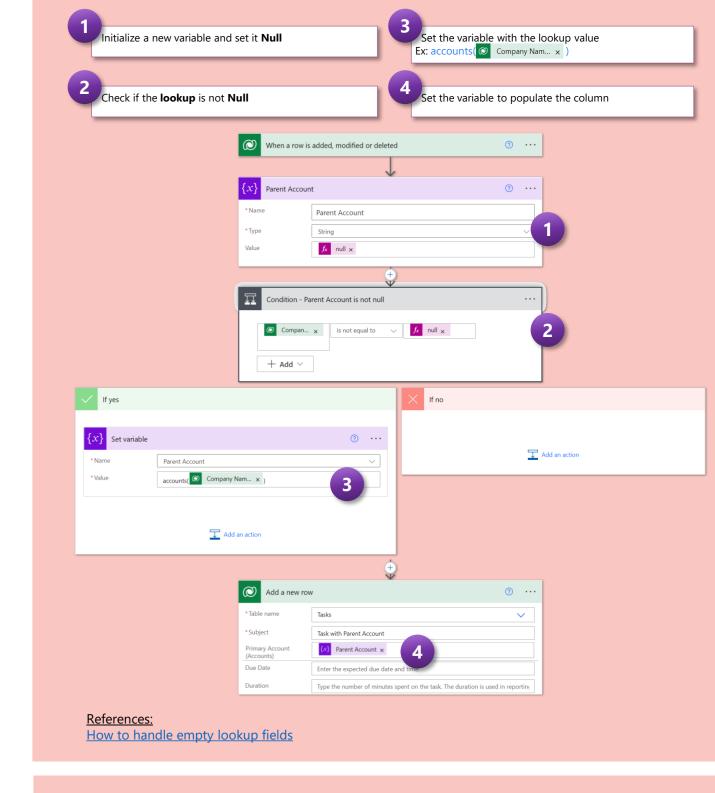
Change sets provide a way to bundle several

all the operations are considered atomic, which means

that if any one of the operations fails, any completed

Use a flow to perform a change set request in Dataverse

entire environment, not on specific tables or rows.



REFERENCES

- Blog posts on <u>CLOUD FLOWS</u> by *Linn Zaw Win*
- <u>FetchXML Builder</u> by *Jonas Rapp*
- <u>Level up for Dynamics365/Power Apps</u> by **Natraj Yegnaraman**
- How to get entitysetname while setting lookup value in Power Automate by Debajit Dutta
- Power Automate Gymnastics Reference Guide by CRM Tip of the Day
- Blog posts on Power Automate by CRM Tip of the Day