

FLOW SCHEDULER FOR DYNAMICS 365

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INTRODUCTION



INTRODUCTION

FLOW SCHEDULER FOR DYNAMICS 365

In this manual we represent and detail all features related to the installation of the new component «Flow Scheduler for Dynamics 365» within Microsoft Dynamics 365

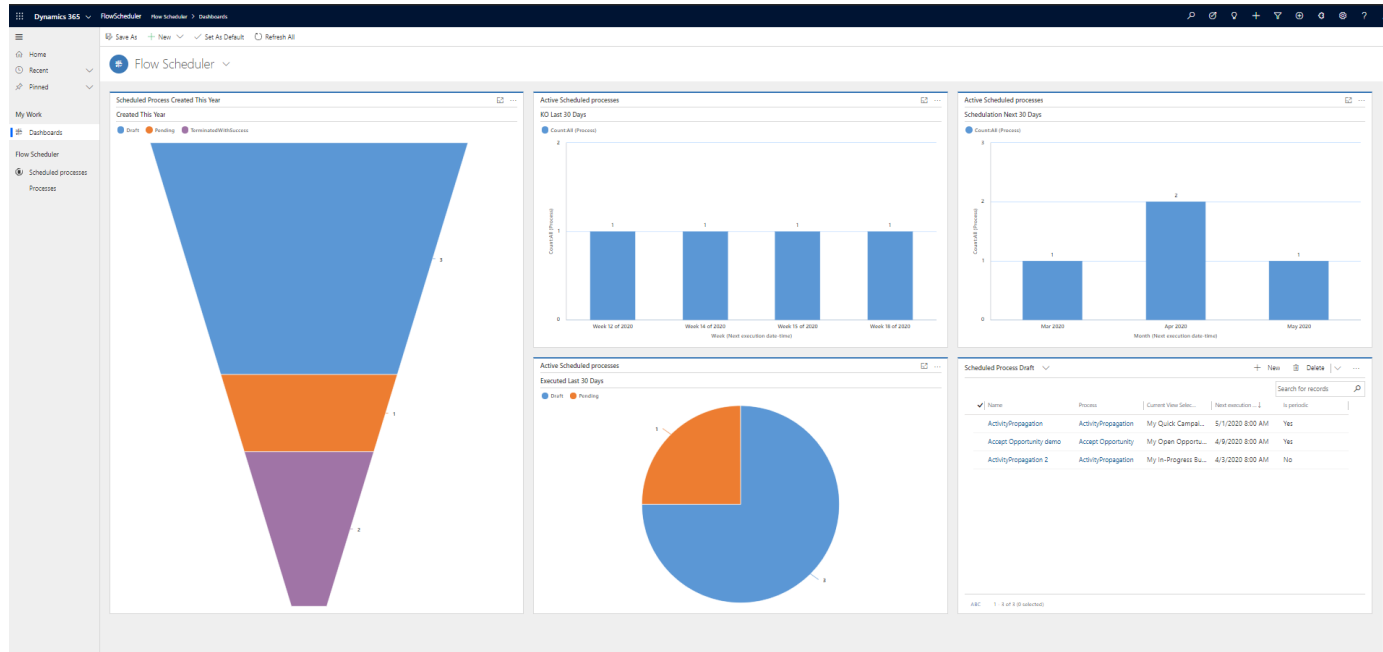
The new solution allows to schedule Workflows for automatic execution...



NAVIGATION PATH



FLOW SCHEDULER DASHBOARD



FLOW SCHEDULER

SCHEDULED PROCESS SECTION

Dynamics 365 FlowScheduler New Scheduler Scheduled processes

Show Chart New Delete Refresh Email a Link Flow Run Report Excel Templates Export to Excel Import from Excel Create view

Active Scheduled processes Search for records

✓ Home	T	Created On
Accept Opportunity demo		4/1/2020 5:35 PM
ActivityPropagation		3/24/2020 6:27 PM
ActivityPropagation 2		3/24/2020 6:28 PM
ActivityPropagation 3		3/24/2020 6:29 PM

My Work

Dashboards

Flow Scheduler

Scheduled processes

Processes



FLOW SCHEDULER

SCHEDULATION

Dynamics 365 FlowScheduler

Save Save & Close New Schedule Flow

New Scheduled process

Active Status Draft Status Reason MCD Administrator Owner

General

Name

Process

Next execution date-time

to periodic: No

Select Data By: View

Current View Selected

Search

Execution details



WORKFLOW CONFIGURATION SECTIONS



FLOW SCHEDULER

SCHEDULATION

Dynamics 365 FlowScheduler

Save Save & Close New Schedule Flow

New Scheduled process

Active Status Draft Status Reason MCD Administrator Owner

General

Name + ... 1

Process + ...

Next execution date-time ---

to periodic: No

Select Data By: View 2

Current View Selected ---

Search 3

Execution details ---



FLOW SCHEDULER

Dynamics 365 FlowScheduler

Save Save & Close New Schedule Flow

New Scheduled process

Active Status Draft Status Reason MCD Administrator Owner

General

Name + ...

Process + ...

Next execution date-time

1

to periodic No

Select Data By View

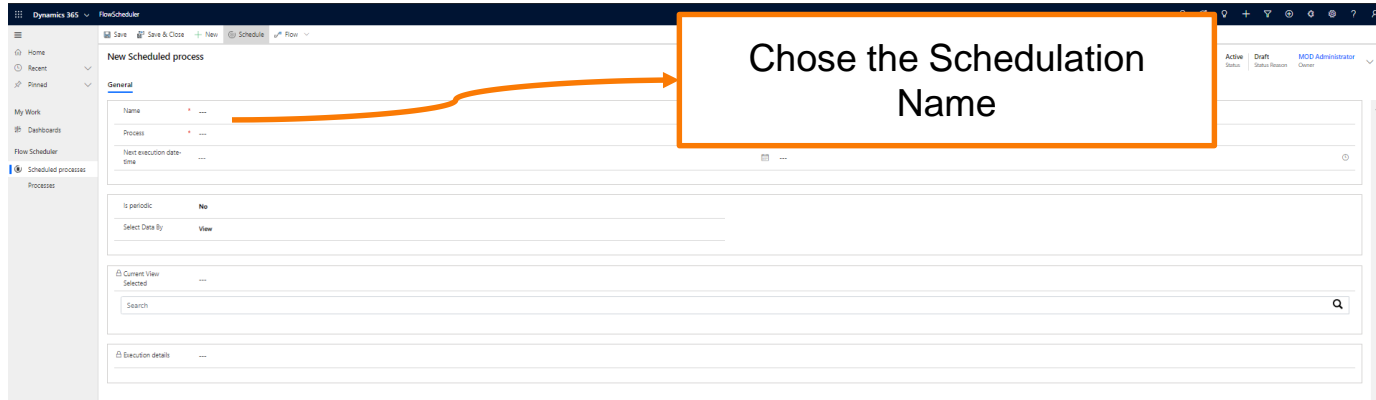
Current View Selected

Search

Execution details



FLOW SCHEDULER



The screenshot shows the Dynamics 365 Flow Scheduler interface. On the left, a navigation pane includes 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Flow Scheduler', and 'Scheduled processes'. The 'Flow Scheduler' section is expanded, showing 'Processer'. The main area is titled 'New Scheduled process' and has tabs for 'General', 'Schedule', and 'Flow'. The 'General' tab is active, displaying fields for 'Name', 'Process', 'Next execution date-time', 'Is periodic' (set to 'No'), 'Select Data By' (set to 'View'), 'Current View Selected' (with a search bar), and 'Execution details'. An orange arrow points from the 'Name' field to a text box that says 'Chose the Schedulation Name'.

Chose the Schedulation Name



FLOW SCHEDULER

The screenshot shows the 'New Scheduled process' form in Dynamics 365. The 'Process' dropdown menu is highlighted with an orange box, and an orange arrow points to it from the left. The form includes the following fields and options:

- Name:** A text input field.
- Process:** A dropdown menu with a search icon.
- Next execution date:** A date input field.
- Time:** A time input field.
- to periodic:** A toggle switch set to 'No'.
- Select Data By:** A dropdown menu set to 'View'.
- Current View:** A dropdown menu set to 'Selected'.
- Search:** A search input field.
- Execution details:** A section with a plus icon and a minus icon.

An orange box highlights the 'Process' dropdown menu, and an orange arrow points to it from the left. The text 'Select a Process*' is written inside the box.

*the process selected must be created/configured as a Workflow with the option «As an on-demand process»



FLOW SCHEDULER

The screenshot shows the 'New Scheduled process' form in Dynamics 365. The left sidebar contains navigation links: Home, Recent, Private, My Work, Dashboards, Flow Scheduler, and Scheduled processes. The main form area is titled 'New Scheduled process' and has tabs for 'General', 'Schedule', and 'Flow'. The 'General' tab is active, showing fields for 'Name', 'Process', and 'Next execution date-time'. An orange arrow points from the 'Next execution date-time' field to a callout box. Below these fields are sections for 'Is periodic' (set to 'No'), 'Select Data By' (set to 'View'), 'Current View' (set to 'Selected'), and 'Execution details'. A search bar is also present. The top right of the form shows the user's name 'MOD Administrator' and their role 'Owner'.

Set the Next Execution date-time



FLOW SCHEDULER

Dynamics 365 FlowScheduler

Save Save & Close New Schedule Flow

New Scheduled process

Active Status Draft Status Reason MCD Administrator Owner

General

Name

Process

Next execution date-time

Is periodic: No

Select Data By: View

Current View Selected

Search

Execution details

2



FLOW SCHEDULER

1 – Select Is Periodic = No if you want a single execution Scheduling

Is periodic	No
Select Data By	View

1 – Select Is Periodic = YES if you want a Recurrent Scheduling

In this case you need to define the following Fields:

- How Many Repetitions: is a number of total repetition (it must be a positive number)
- Frequency: select from menu the frequency you want

Is periodic	Yes	How many repetitions	---	repetitions	---
Select Data By	View	Frequency	---	Frequency	--Select-- --Select-- Hourly Daily Weekly Monthly



FLOW SCHEDULER

SCHEDULATION

Dynamics 365 FlowScheduler

Save Save & Close New Schedule Flow

New Scheduled process

Active Status Draft Status Reason MCD Administrator Owner

General

Name

Process

Next execution date-time

to periodic: No

Select Data By: View

Current View Selected

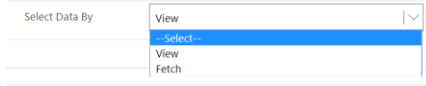
Search

Execution details

3



FLOW SCHEDULER



A screenshot of a web interface showing a dropdown menu labeled 'Select Data By'. The menu is open, displaying three options: 'View' (highlighted in blue), 'Fetch', and 'Fetch'. The 'View' option is currently selected.

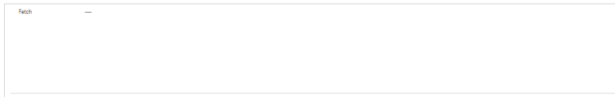
In this section there are 2 possible situation in according to the Field «Select Data By» Value selected in the previous section

If you chose View: in the this section you can select the View using the Search bar
You can select form a list of View that have as principal entity the same configured in the Process selected in the first Section



A screenshot of a web interface showing a search bar labeled 'Current View'. The search bar is active, and a list of results is displayed below it. The results include 'Completed Bulk Operations', 'In-Progress Bulk Operations', and 'My Quick Campaigns'. An orange arrow points from the search bar to the list of results.

If you chose Fetch: you can write fetch by your own, the fetch must be configured for retrieve the same entity configured in the Process selected in the first Section



A screenshot of a web interface showing a text input field labeled 'Fetch'. The field is empty and ready for user input.



ACTIVATE/ DEACTIVATE SCHEDULATION



FLOW SCHEDULER

ACTIVATE SCHEDULATION

When you finish to configure your schedulation you need to Schedule it

Click on Schedule Button, then click Ok on the information message

The screenshot displays the 'Flow Scheduler' interface for a process named 'demo'. The 'General' tab is active, showing the process name, the associated activity 'ActivityPropagation', and the next execution date-time as '4/1/2020'. Below this, configuration details are shown: 'Is periodic' is set to 'Yes', 'How many repetitions' is '50', and the 'Frequency' is 'Weekly'. A search bar for 'My Quick Campaigns' is also visible. An orange arrow points from the 'Schedule' button in the top toolbar to the 'demo' process card. A confirmation dialog box is open in the foreground, displaying the text 'crm181832.crm4.dynamics.com dice' and 'The selected View/Fetch Count 0 records'. The dialog has 'Ok' and 'Annula' (sic) buttons, with the 'Ok' button highlighted by an orange box.



FLOW SCHEDULER

DEACTIVATE SCHEDULATION

If you want to stop the Schedulation

Click on Draft Button

New

Deactivate

Draft

Delete

Refresh

Assign

Share

Email a Link

Flow

Word Templates

Run Report

demo

Scheduled process

Active Status

Programmed Status Reason

MOD Administrator Owner

General

Related

Name

*

demo

Process

*

ActivityPropagation

Next execution date-time

4/1/2020

9:30 AM

Is periodic

Yes

How many repetitions

50

Select Data By

View

Frequency

Weekly

