

*Lumel*



PowerTable  
by Lumel

# PowerTable

Automation



Microsoft Fabric

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# How Automation works in PowerTable



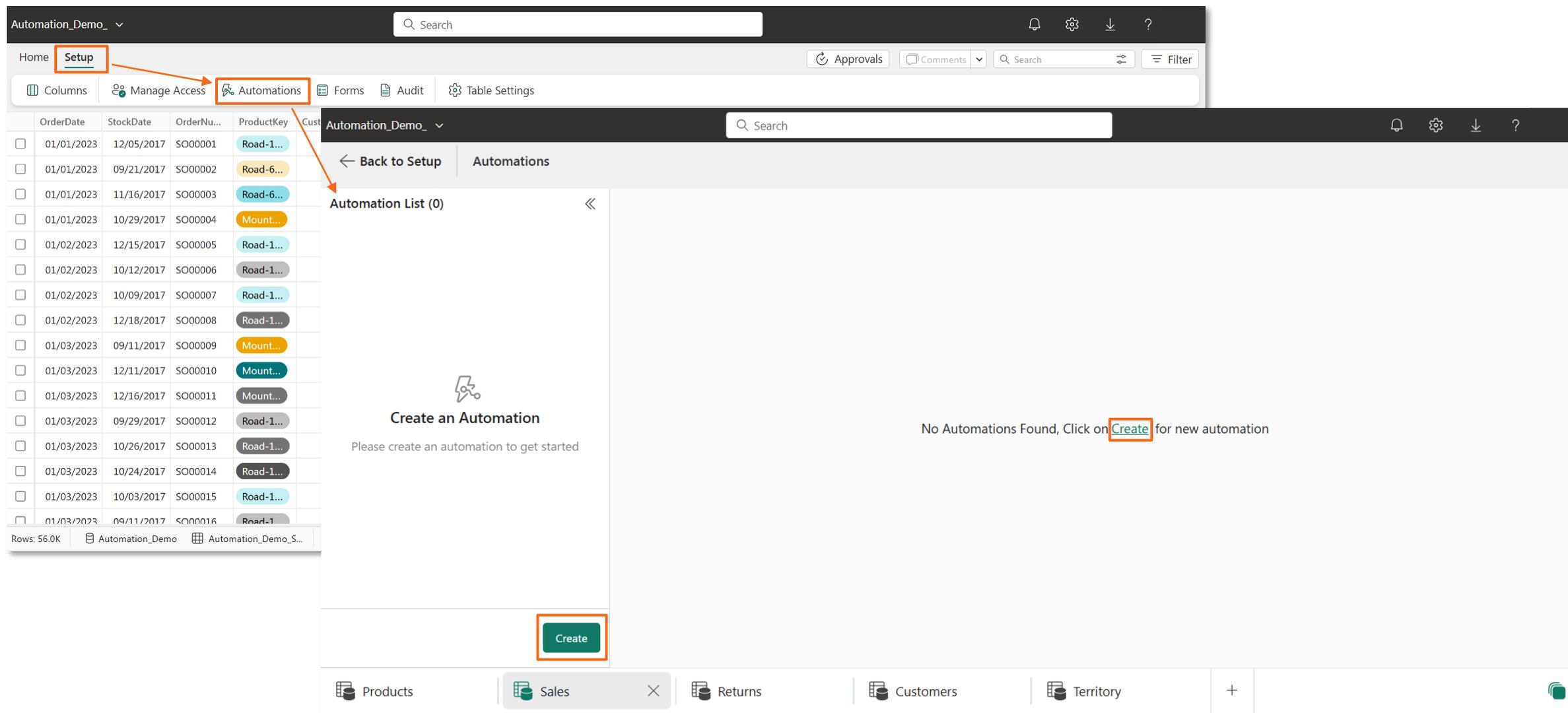
## What can I use it for?

- Workflow Management
- Cascading Updates
- E-Mail and MS Teams Notifications
- Webhooks
- ...and more



**Step #1: Define the event that triggers the automation**

# 1. Create an automation



Automation\_Demo\_ > Search

Home **Setup** Approvals Comments Search Filter

Columns Manage Access **Automations** Forms Audit Table Settings

OrderDate	StockDate	OrderNu...	ProductKey	Cust
01/01/2023	12/05/2017	SO00001	Road-1...	
01/01/2023	09/21/2017	SO00002	Road-6...	
01/01/2023	11/16/2017	SO00003	Road-6...	
01/01/2023	10/29/2017	SO00004	Mount...	
01/02/2023	12/15/2017	SO00005	Road-1...	
01/02/2023	10/12/2017	SO00006	Road-1...	
01/02/2023	10/09/2017	SO00007	Road-1...	
01/02/2023	12/18/2017	SO00008	Road-1...	
01/03/2023	09/11/2017	SO00009	Mount...	
01/03/2023	12/11/2017	SO00010	Mount...	
01/03/2023	12/16/2017	SO00011	Mount...	
01/03/2023	09/29/2017	SO00012	Road-1...	
01/03/2023	10/26/2017	SO00013	Road-1...	
01/03/2023	10/24/2017	SO00014	Road-1...	
01/03/2023	10/03/2017	SO00015	Road-1...	
01/03/2023	09/11/2017	SO00016	Road-1...	

Automation\_Demo\_ > Search

← Back to Setup Automations

Automation List (0)

Create an Automation

Please create an automation to get started

No Automations Found, Click on **Create** for new automation

Rows: 56.0K Automation\_Demo Automation\_Demo\_S...

Products Sales Returns Customers Territory +

## 2. Define the event trigger

The screenshot displays the PowerTable interface for creating an automation. At the top, there is a search bar and navigation icons. Below the search bar, the page is titled 'Automations' with a 'Back to Setup' link. The main area is divided into two sections: 'Automation List (0)' on the left and a central workspace. The workspace contains a '+ Add Trigger' button at the top, followed by a section titled 'Suggested triggers for you:' which lists five options: 'When a record is created', 'When a record is updated', 'When a record is deleted', 'At a scheduled time', and 'When a form is submitted' (marked as 'Coming soon'). An orange box highlights this list, and an orange callout box with the text 'Specify the event that must trigger the automation' points to it. A 'Create' button is located at the bottom left of the workspace. The bottom navigation bar shows tabs for 'Products', 'Sales', 'Returns', 'Customers', and 'Territory', with a plus sign and a document icon on the right.

Automation\_Demo\_ ▾ Search

← Back to Setup Automations

Automation List (0) <<

**Create an Automation**  
Please create an automation to get started

**+ Add Trigger**

**Suggested triggers for you:**

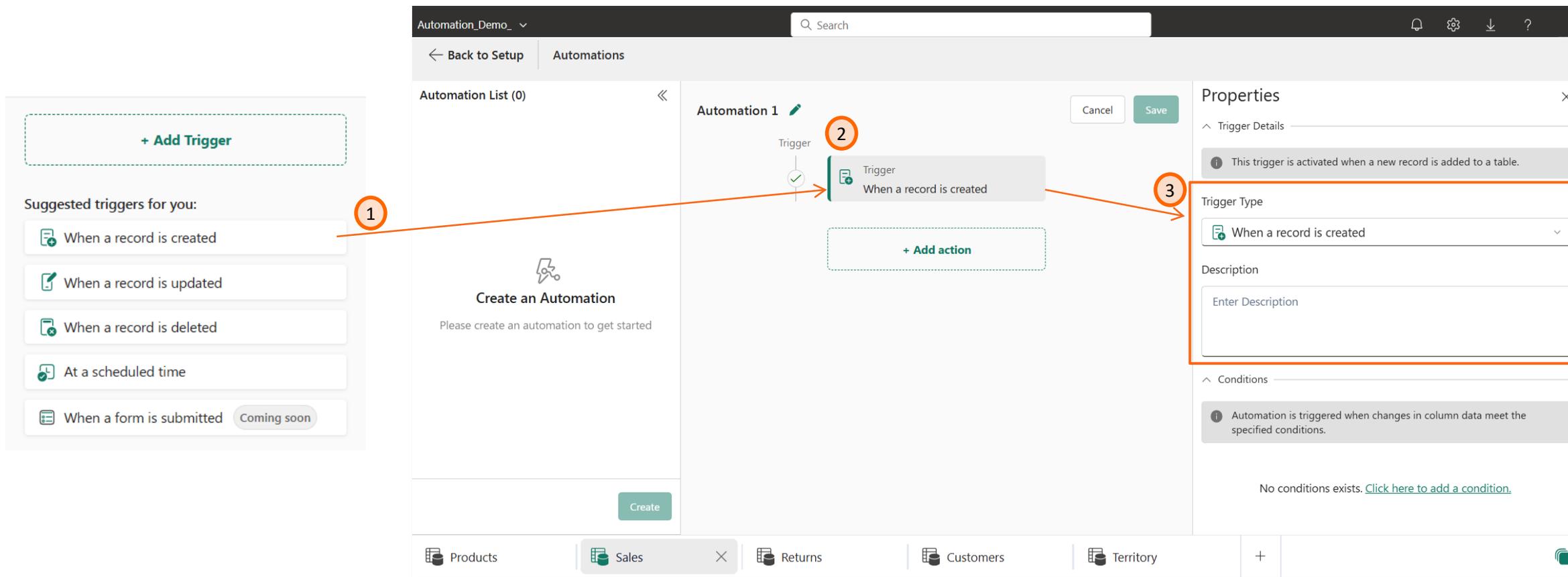
- When a record is created
- When a record is updated
- When a record is deleted
- At a scheduled time
- When a form is submitted Coming soon

**Specify the event that must trigger the automation**

Create

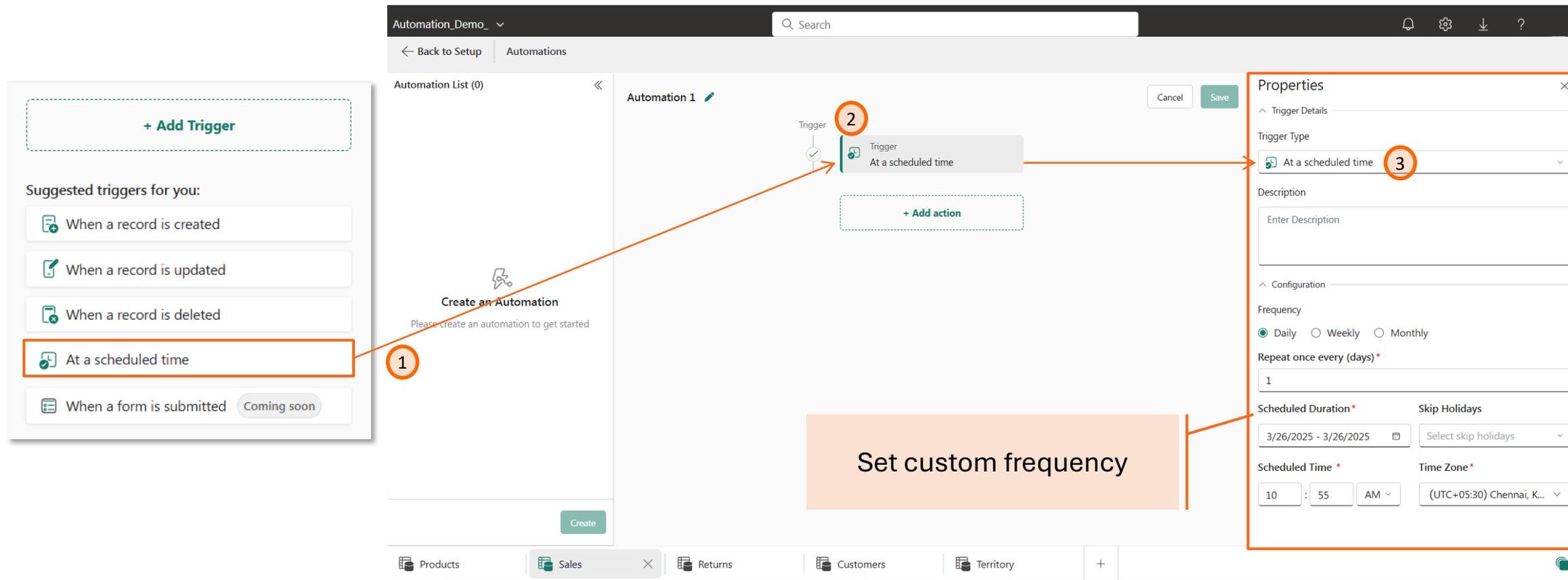
Products Sales Returns Customers Territory +

### 3. Give a description once you choose the event trigger



The screenshot displays the 'Automation Demo' interface. On the left, a panel titled 'Suggested triggers for you:' contains five options: 'When a record is created', 'When a record is updated', 'When a record is deleted', 'At a scheduled time', and 'When a form is submitted' (marked 'Coming soon'). A dashed box labeled '1' highlights the 'When a record is created' option. An arrow points from this box to the 'Automation 1' configuration screen, where the 'Trigger' section is selected and labeled '2'. The trigger is 'When a record is created'. Below it is a '+ Add action' button. An arrow labeled '3' points from the trigger to the 'Properties' panel on the right. In the 'Properties' panel, the 'Trigger Type' is set to 'When a record is created'. The 'Description' field is highlighted with a dashed box and contains the placeholder text 'Enter Description'. Below the description field, the 'Conditions' section is visible, showing a note: 'Automation is triggered when changes in column data meet the specified conditions.' and a link: 'No conditions exists. [Click here to add a condition.](#)'

# 4. The event can also be scheduled



The screenshot displays the 'Automation 1' configuration screen. On the left, a 'Suggested triggers for you:' panel lists five options, with 'At a scheduled time' highlighted by a red box and labeled '1'. An arrow points from this box to the 'Trigger' section of the automation, which is labeled '2'. The 'Trigger' section shows 'At a scheduled time' selected, with an arrow pointing to the 'Properties' panel on the right, labeled '3'. The 'Properties' panel is expanded to show 'Trigger Details' and 'Configuration'. Under 'Configuration', the 'Frequency' is set to 'Daily', 'Repeat once every (days)' is '1', 'Scheduled Duration' is '3/26/2025 - 3/26/2025', 'Skip Holidays' is 'Select skip holidays', 'Scheduled Time' is '10 : 55 AM', and 'Time Zone' is '(UTC+05:30) Chennai, K...'. A large orange box at the bottom center contains the text 'Set custom frequency'.



## Step #2: Verify event conditions

# 5. Verify conditions for the event

Automation\_Demo\_ Search

Back to Setup Automations

Automation List (0)

Create an Automation  
Please create an automation to get started

Create

Automation 1

Cancel Save

Trigger

Trigger  
When a record is created

+ Add action

Properties

Trigger Details

This trigger is activated when a new record is added to a table.

Trigger Type  
When a record is created

Description  
Enter Description

Conditions

Automation is triggered when changes in column data meet the specified conditions.

Condition

CustomerKey is not empty

AND OR

Order Status is not empty

+ Add

Products Sales Returns Customers Territory

The 'Create Record' event meets the condition (to initiate automation) when the Customer Key and Order Status fields are not empty

Supports AND/OR conditions



**Step #3: Define the action to be taken**

## 6. Choose your automation action

Automation\_Demo\_ | Search

← Back to Setup | Automations

Automation List (0) | Automation 1

Cancel | Save

Trigger

Trigger  
When a record is created

+ Add action

Database Actions

- Create Record
- Update Record
- Delete Record

Integrations

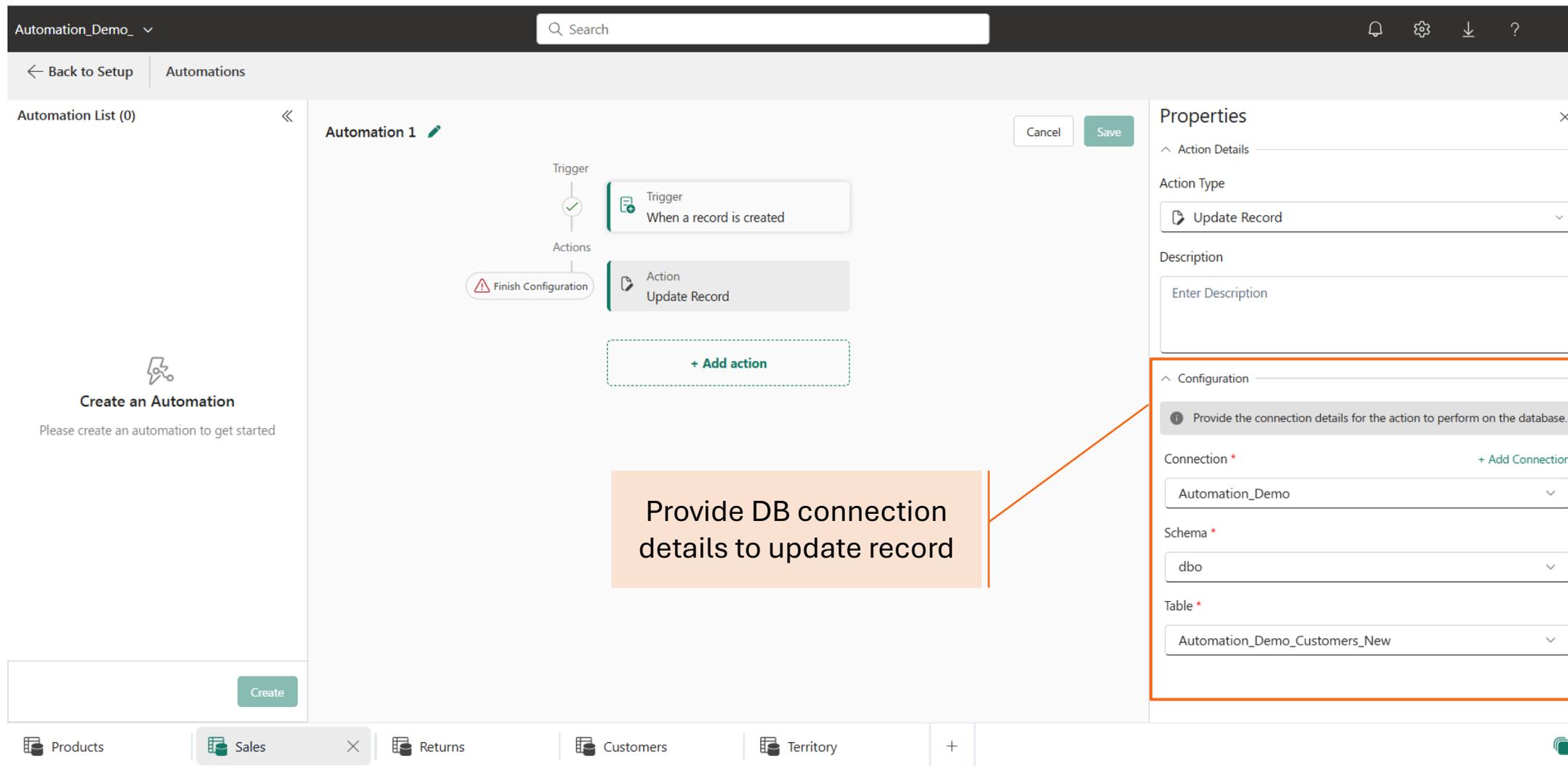
- Send Email
- Trigger Webhook
- Microsoft Teams Message

Typically in some other table

Create

Products | Sales | Returns | Customers | Territory | +

# 7. Connect to a Database Table



Automation\_Demo\_

Search

Back to Setup Automations

Automation List (0)

Automation 1

Trigger

Trigger  
When a record is created

Actions

Finish Configuration

Action  
Update Record

+ Add action

Cancel Save

Properties

^ Action Details

Action Type  
Update Record

Description  
Enter Description

^ Configuration

Provide the connection details for the action to perform on the database.

Connection \* + Add Connection  
Automation\_Demo

Schema \*  
dbo

Table \*  
Automation\_Demo\_Customers\_New

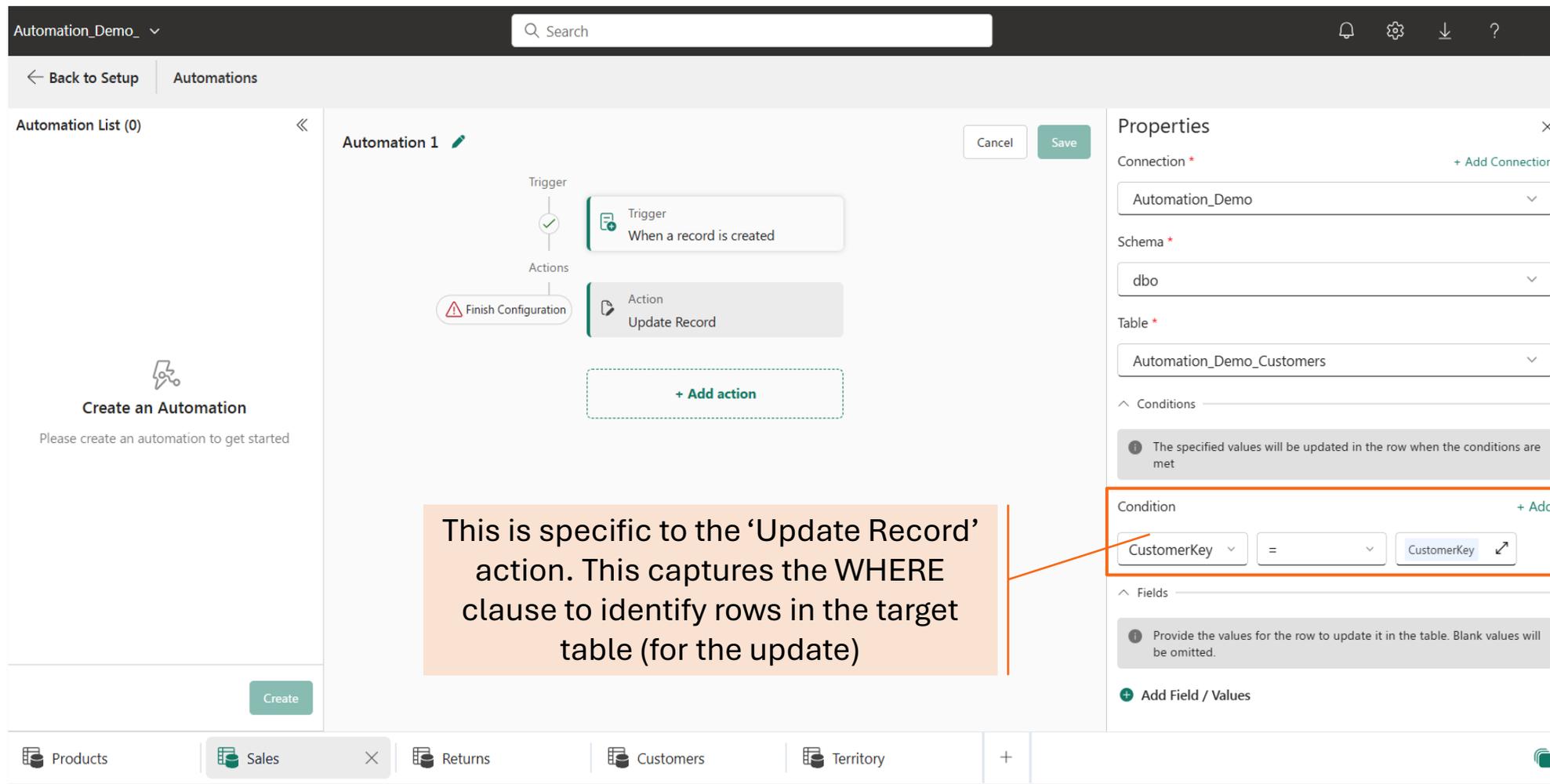
Create an Automation  
Please create an automation to get started

Create

Products Sales Returns Customers Territory

Provide DB connection details to update record

# 8. Set up additional properties



Automation\_Demo\_

Search

Back to Setup Automations

Automation List (0)

Automation 1

Cancel Save

Trigger

Trigger  
When a record is created

Actions

Finish Configuration

Action  
Update Record

+ Add action

Create an Automation

Please create an automation to get started

Create

Properties

Connection \* + Add Connection

Automation\_Demo

Schema \*

dbo

Table \*

Automation\_Demo\_Customers

Conditions

The specified values will be updated in the row when the conditions are met

Condition + Add

CustomerKey = CustomerKey

Fields

Provide the values for the row to update it in the table. Blank values will be omitted.

+ Add Field / Values

Products Sales Returns Customers Territory

This is specific to the 'Update Record' action. This captures the WHERE clause to identify rows in the target table (for the update)

# 9. Configure Field to perform the Action

Automation\_Demo\_ ▾ Search

← Back to Setup Automations

Automation List (0) <<

Automation 1 ✎

### Column Configuration

- T LastName Click Insert Variable to select an option +
- BirthDate Click Insert Variable to select an option +
- T MaritalStatus Click Insert Variable to select an option +
- T Gender Click Insert Variable to select an option +
- T EmailAddress Click Insert Variable to select an option +
- T AnnualIncome Click Insert Variable to select an option +
- # TotalChildren Click Insert Variable to select an option +
- T EducationLevel Click Insert Variable to select an option +
- T Occupation Click Insert Variable to select an option +
- T HomeOwner Click Insert Variable to select an option +
- T Status Active +**

Cancel Save

### Properties

Automation\_Demo ▾

Schema \*  
dbo ▾

Table \*  
Automation\_Demo\_Customers ▾

Conditions

The specified values will be updated in the row when the conditions are met

Condition + Add

CustomerKey ▾ = ▾ CustomerKey ↗

Fields

Provide the values for the row to update it in the table. Blank values will be omitted.

Field / Values

T Status Active Edit

Update select field(s) for the chosen records

# 10. Name the automation and save it

Automation\_Demo\_ ▾

Search

⏪ Back to Setup Automations

Automation List (0) <<

**Customer Status Update** ✎

Cancel Save

**Properties** ✕

Automation\_Demo ▾

Schema \*  
dbo ▾

Table \*  
Automation\_Demo\_Customers ▾

^ Conditions

**i** The specified values will be updated in the row when the conditions are met

Condition + Add

CustomerKey ▾ = ▾ CustomerKey ↗

^ Fields

**i** Provide the values for the row to update it in the table. Blank values will be omitted.

Field / Values Edit

Status Active

Create

Products Sales Returns Customers Territory +

## Other Actions

We observed the 'Update Record' action

Let's look at other types of automation actions available

# 11. Send E-mail Notification

The screenshot displays the PowerTable automation configuration interface. On the left, the 'Automation List (3)' shows three active automations: 'Customer Status Update', 'Teams Message', and 'Cascading Automation'. The main workspace is titled 'Email Notif on Deletion' and shows a workflow diagram with a 'Trigger' (When a record is deleted) and an 'Action' (Send Email). A callout box points to the 'Send Email' action with the text 'You can send emails'. On the right, the 'Properties' panel is open, showing the 'Send Email' action type and configuration fields for 'To', 'Subject', and 'Body'. The 'To' field is highlighted with an orange box. The bottom navigation bar includes tabs for 'Products', 'Sales', 'Returns', 'Customers', and 'Territory'.

# 12. Send MS Teams message

The screenshot displays the PowerTable automation configuration interface. On the left, the 'Automation List (3)' shows two active automations: 'Customer Status Update' and 'Teams Message', both triggered 'When a record is created'. The main workspace shows the configuration for the 'Teams Message' automation, which includes a trigger 'When a record is created' and an action 'Microsoft Teams Message'. An orange callout box labeled 'Notify in MS Teams' points to the 'Microsoft Teams Message' action. On the right, the 'Properties' panel is open, showing the configuration for the 'Microsoft Teams Message' action. The 'Action Type' is set to 'Microsoft Teams Message'. The 'Message' field contains the text 'Sale recorded - OrderNumber'. The 'Configure Notifications On Microsoft Teams' section is expanded, showing a list of channels: 'Teams', 'Updates', 'Channel', 'Return Updates', and 'Webhook URL'. The 'Teams' channel is selected.

Automation\_Demo\_ ▾ Search

← Back to Setup Automations

Automation List (3) <<

- Customer Status Update When a record is created
- Teams Message When a record is created

**Teams Message** History

Created By Created At Mar 25, 2025, 5:04 PM

Trigger

- Trigger When a record is created

Actions

- Action Microsoft Teams Message

+ Add action

**Notify in MS Teams**

**Properties** ✕

^ Action Details

Action Type

Microsoft Teams Message

Configure the Microsoft Teams channel to send notifications or messages when the action is triggered. You can specify the team and channel where the message will be posted.

Description

Enter Description

^ Labels

Message \*

Sale recorded - OrderNumber

^ Configure Notifications On Microsoft Teams

Configure \* + Add Channel

Add channels to receive notifications.

- Teams
- Updates
- Channel
- Return Updates
- Webhook URL

Products Sales Returns Customers Territory +

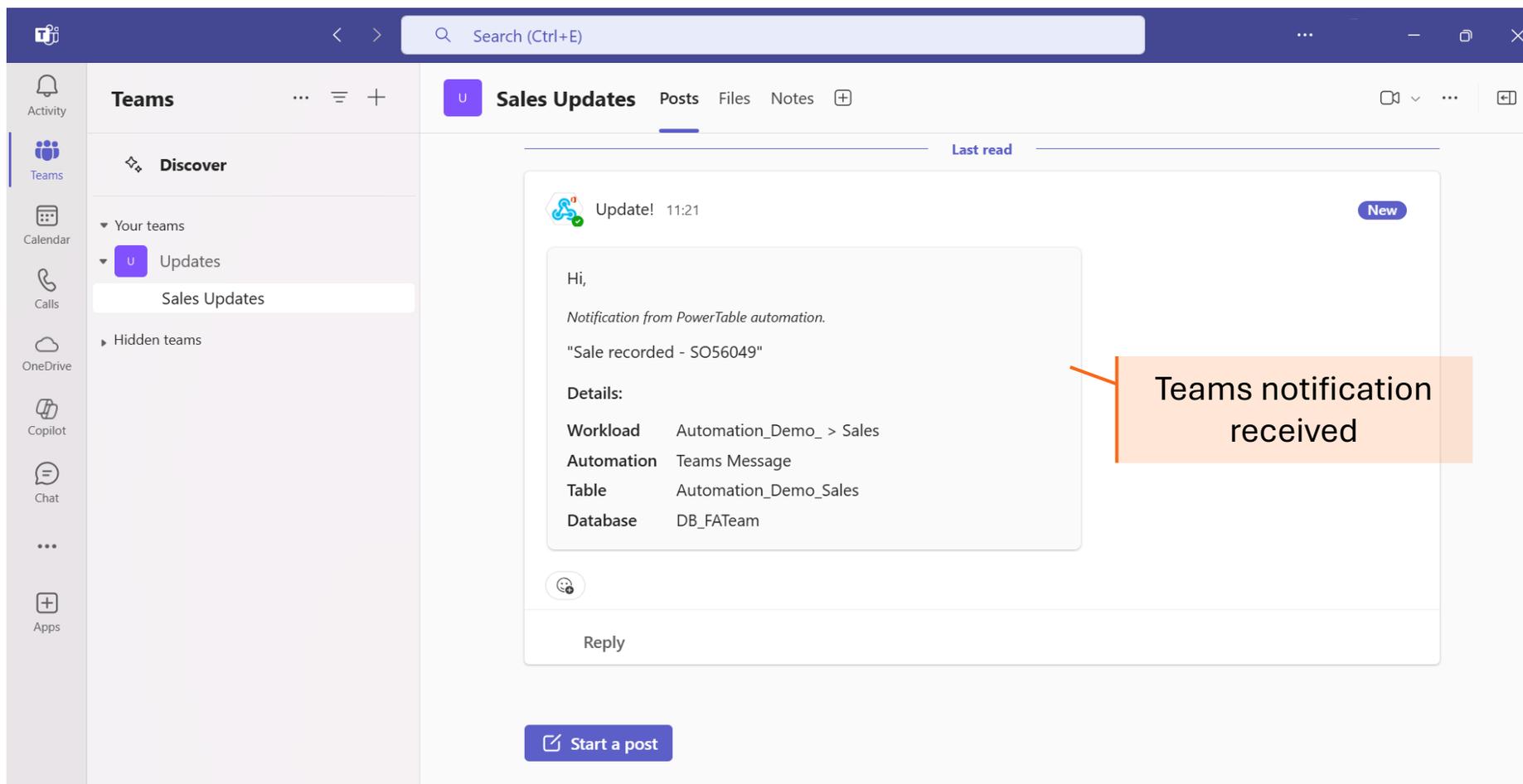
# 12. Send MS Teams message (...cont'd)

Note: You'll need to turn on Microsoft Teams Integrations in PowerTable service

PowerTable		My Integrations		
	Name	Account	Status	
Tables	Microsoft Teams	-	Not Connected	Connect
Transaction Logs	OneDrive	-	Not Connected	Connect
Insights	SharePoint	-	Not Connected	Connect
Metrics	GoogleDrive	-	Not Connected	Connect
	Azure Data Lake Storage	-	Not Connected	Connect
	Fabric Lakehouse	-	Not Connected	Connect
	Power BI	-	Not Connected	Connect


 Microsoft Teams
 [Redacted]@lumel.com
 Connected
Disconnect

# 12. Send MS Teams message (...cont'd)



The screenshot shows a Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Teams, Calendar, Calls, OneDrive, Copilot, Chat, and Apps. The main area displays a chat window for a team named 'Sales Updates'. A message from 'Update!' (11:21) is shown, marked as 'New'. The message content is:

Hi,  
*Notification from PowerTable automation.*  
 "Sale recorded - SO56049"

Below the message is a 'Details' section with the following information:

<b>Workload</b>	Automation_Demo_ > Sales
<b>Automation</b>	Teams Message
<b>Table</b>	Automation_Demo_Sales
<b>Database</b>	DB_FATeam

An orange callout box with an arrow pointing to the message content contains the text: "Teams notification received". At the bottom of the chat window, there is a 'Reply' input field and a 'Start a post' button.

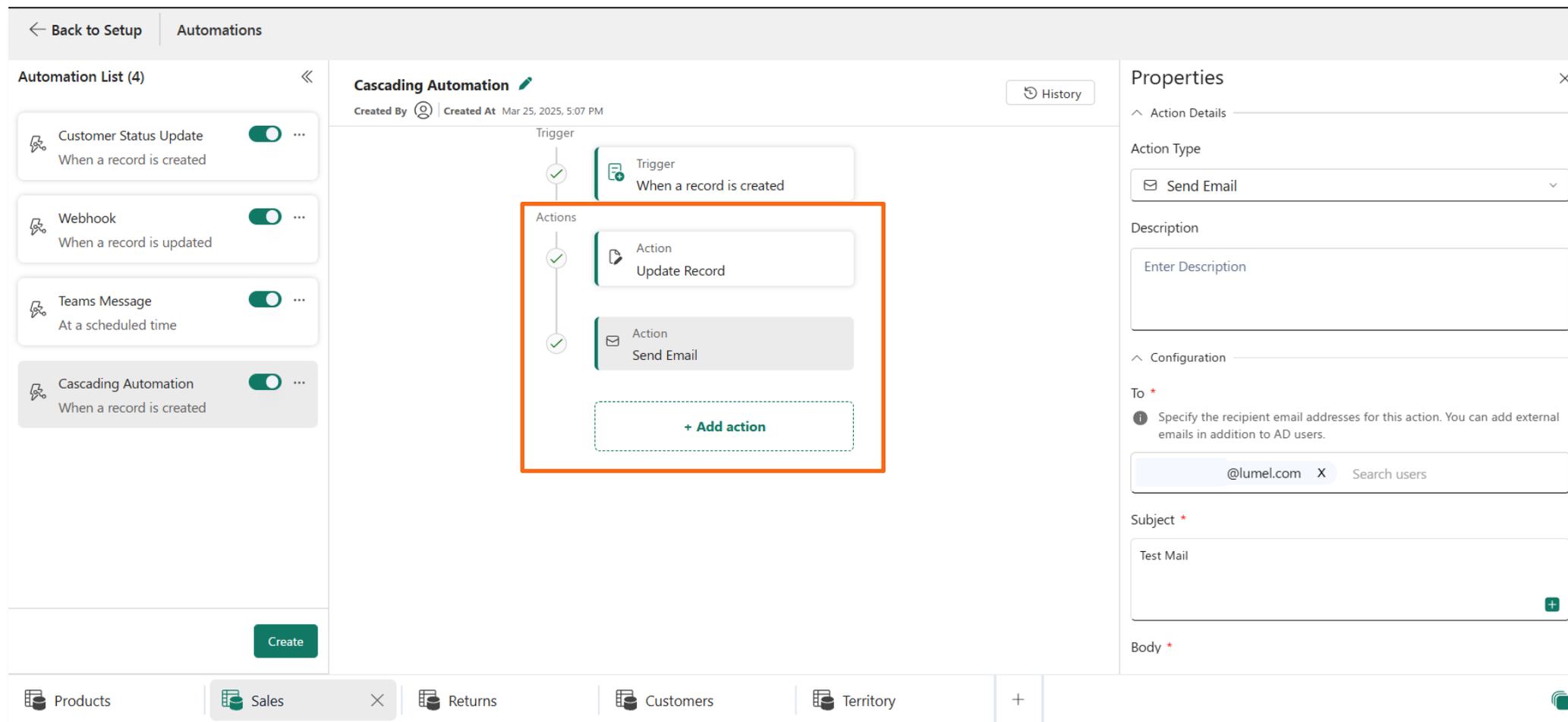
# 13. Trigger Webhooks

The screenshot shows the PowerTable Automations interface. On the left, the 'Automation List (2)' shows two active automations: 'Customer Status Update' and 'Webhook'. The main workspace is titled 'Webhook' and contains a workflow diagram with a 'Trigger' (When a record is updated) and an 'Action' (Trigger Webhook). The 'Action' is highlighted with an orange box. An arrow points from this box to the 'Trigger Webhook' dropdown in the 'Properties' panel. The 'Properties' panel has sections for 'Action Details', 'Action Type' (set to 'Trigger Webhook'), 'Description', and 'Configuration'. Under 'Configuration', the 'HTTP Request Configuration' section shows a 'POST' method and a URL. Below this, the 'Auth' tab is highlighted with an orange box, and an arrow points from a callout box to it. The bottom of the interface shows a navigation bar with tabs for 'Products', 'Sales', 'Returns', 'Customers', and 'Territory'.

Attach the Webhook Link

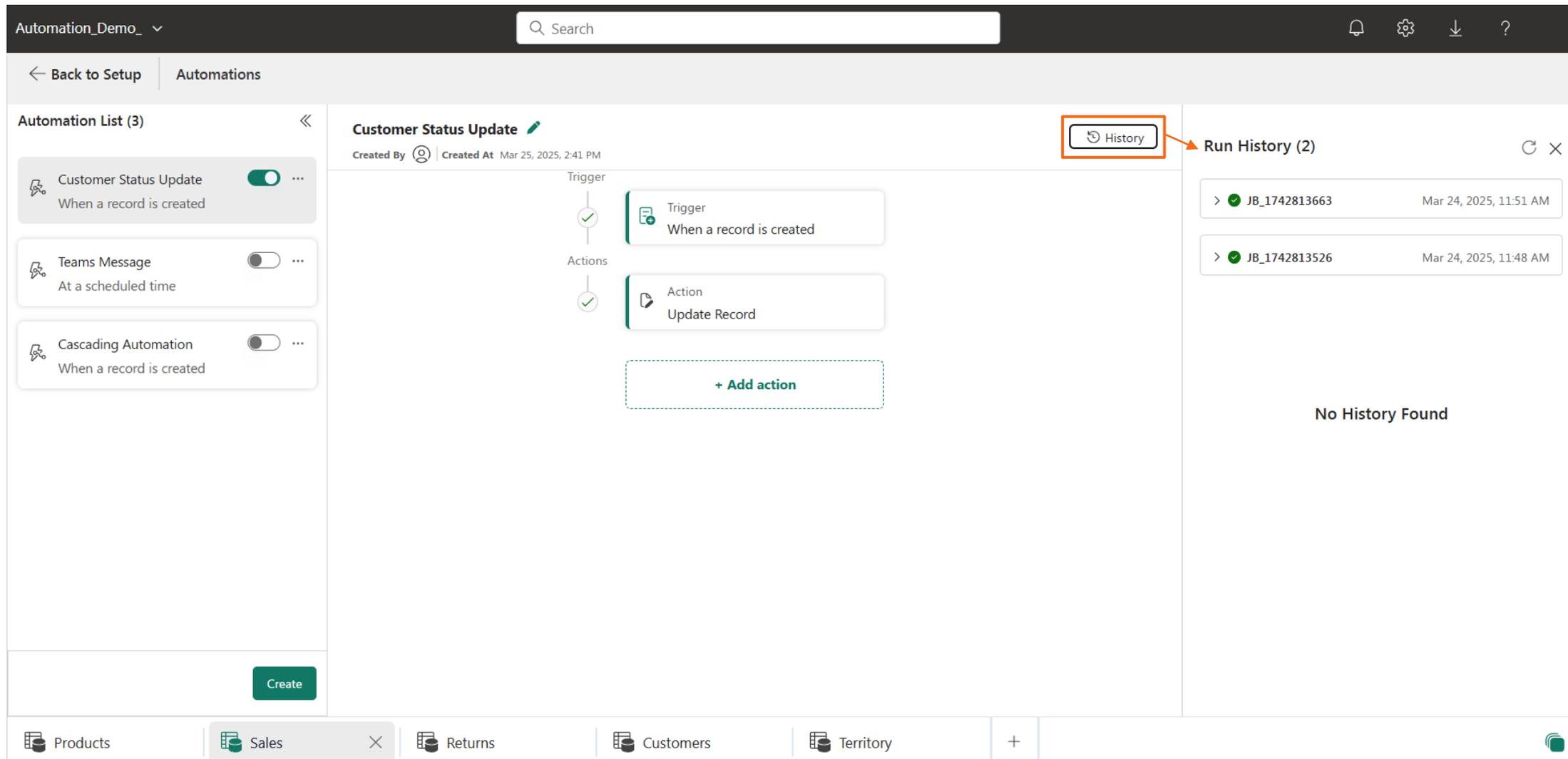
Enter the required parameters

# 14. Multiple actions can be undertaken



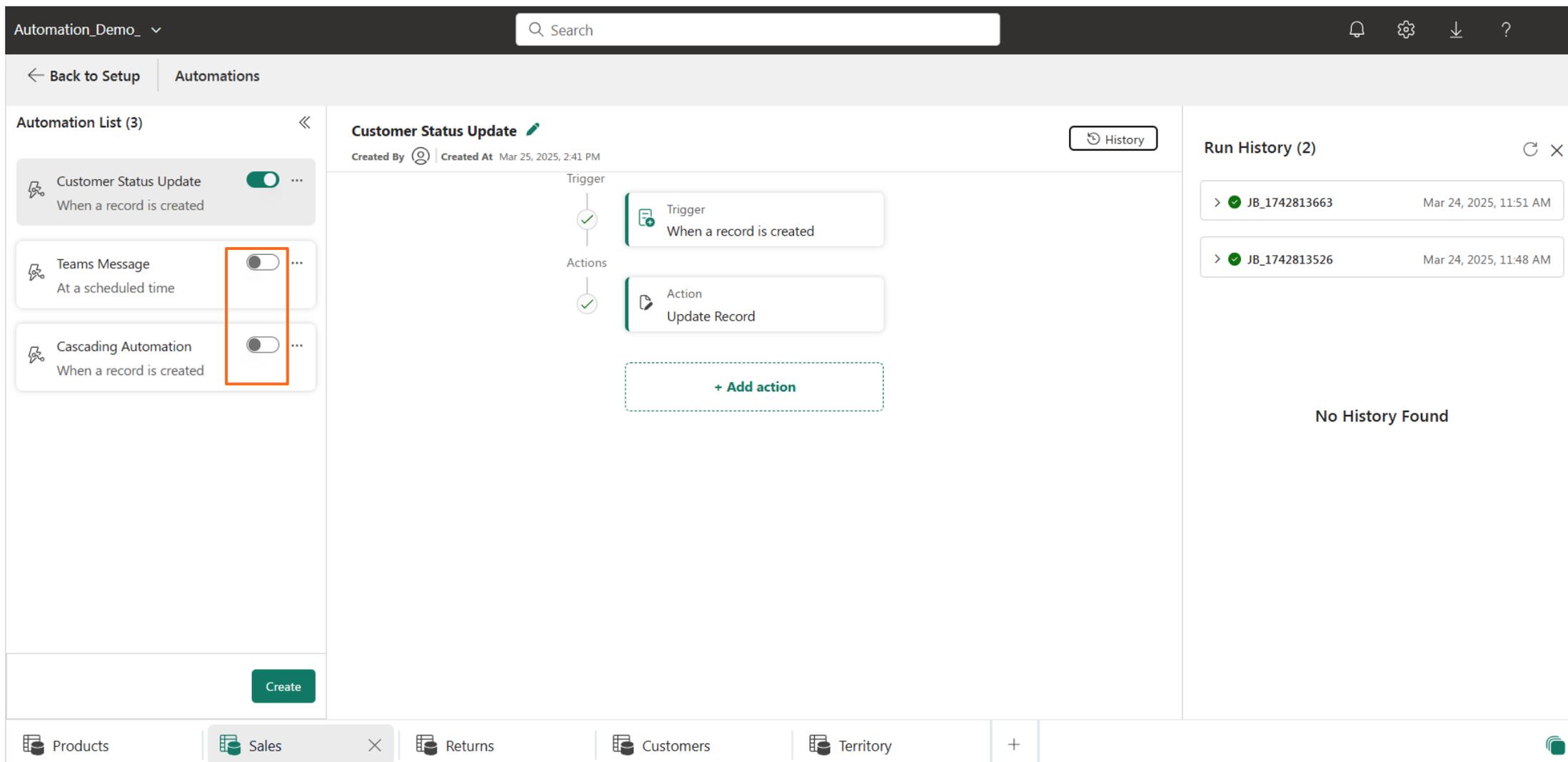
The screenshot displays the 'Automations' section of the PowerTable interface. On the left, an 'Automation List (4)' shows various automation types, with 'Cascading Automation' selected. The main workspace shows the configuration for a 'Cascading Automation' triggered 'When a record is created'. The automation flow includes a trigger followed by two actions: 'Update Record' and 'Send Email'. A red box highlights the 'Actions' section, which also contains a '+ Add action' button. The right-hand 'Properties' panel is open, showing configuration options for the 'Send Email' action, including 'Action Type', 'Description', 'Configuration', 'To' (recipient email addresses), 'Subject', and 'Body'. The bottom navigation bar shows tabs for 'Products', 'Sales', 'Returns', 'Customers', and 'Territory'.

# 15. Check Automation History for Status Update



The screenshot displays the PowerTable interface for managing automations. On the left, an 'Automation List (3)' shows three items: 'Customer Status Update' (When a record is created), 'Teams Message' (At a scheduled time), and 'Cascading Automation' (When a record is created). The 'Customer Status Update' automation is selected, showing its configuration in the main area. The configuration includes a 'Trigger' of 'When a record is created' and an 'Action' of 'Update Record'. A '+ Add action' button is visible below the actions. A 'History' button is highlighted with a red box. To the right, a 'Run History (2)' panel is open, showing two successful runs with IDs JB\_1742813663 and JB\_1742813526, both dated Mar 24, 2025. Below the history list, the text 'No History Found' is displayed. The bottom of the interface shows a navigation bar with tabs for Products, Sales, Returns, Customers, and Territory.

# 16. Pause/Turn off your automations as needed



The screenshot displays the PowerTable Automations interface. On the left, the 'Automation List (3)' shows three automations: 'Customer Status Update' (active), 'Teams Message' (inactive), and 'Cascading Automation' (inactive). The 'Teams Message' and 'Cascading Automation' toggle switches are highlighted with an orange box. The main area shows the configuration for 'Customer Status Update', which was created on Mar 25, 2025, at 2:41 PM. It features a 'Trigger' of 'When a record is created' and an 'Action' of 'Update Record'. A '+ Add action' button is visible below the action list. On the right, the 'Run History (2)' section shows two successful runs on Mar 24, 2025, with IDs JB\_1742813663 and JB\_1742813526. Below the history is a 'No History Found' message. The bottom navigation bar includes tabs for Products, Sales, Returns, Customers, and Territory.

# 17. Delete Automation

Automation\_Demo1

Search

Back to Setup Automations

Automation List (2)

- Customer Status Update  
When a record is created
- Webhook  
When a record is updated

Webhook

Trigger

- Trigger  
When a record is updated

Actions

- Action  
Trigger Webhook

+ Add action

Pause automation before deletion

Automation\_Demo1

Search

Back to Setup Automations

Automation List (2)

- Customer Status Update  
When a record is created
- Webhook  
When a record is updated

Webhook

Trigger

- Trigger  
When a record is updated

Actions

- Action  
Trigger Webhook

+ Add action

Delete

Only paused automations can be deleted

## Resources

- Get Started: <https://powertable.com/getting-started/>
- Questions/Help: <https://community.powertable.com>
- Documentation: <https://docs.powertable.com>
- Our website: [www.powertable.com](http://www.powertable.com)



# Thank you!

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