Power Automate Solution: Form-Driven Document Intake & Processing

# Overview

This Power Automate solution consists of two coordinated flows triggered sequentially upon submission of a Microsoft Form. It handles the intake of customer information and document attachments, processes and stores them in SharePoint, and creates records in Dataverse (Dataverse for Teams or CDS).

# Use Case

When a customer submits a response through a Microsoft Form:  
  
1. Flow 1 (Form Submission Handler) captures the form response and triggers the second flow.  
2. Flow 2 (Document Processor) processes any uploaded documents, stores them in SharePoint, attaches them to SharePoint list items, and also creates corresponding records in Dataverse with embedded files.

# Flow 1: Customer Details

Trigger: When a new response is submitted in Microsoft Forms.

* Steps:
* Get Response Details – Retrieves the answers from the submitted form.
* Compose – Extracts file upload metadata from the form response.
* Condition Check – Checks if any files were uploaded.
* If Files Are Present:
* • Get file content from OneDrive.
* • Create item in SharePoint List.
* • Add attachment to SharePoint List item.
* • Add a new row in Dataverse.
* • Upload the file or image to Dataverse record.
* • Create a backup file in SharePoint folder (Waiting Approval).
* If Files Are Not Present: Only customer records are created in SharePoint and Dataverse.

# Flow 2: Invoice Approval

Trigger: Tiggered by SharePoint file creation.

* Steps:
* • Further process the file and adds dynamic level based approval from a sharepoint list.
* • Move files between waiting for approval and approved folders.
* • Trigger notifications or updates.

# Flow Coordination

The first flow triggers on form submission and ends with creating records and files. The second flow starts on file creation or record creation and continues processing.

# Connectors Used

|  |  |
| --- | --- |
| Connector Name | Purpose |
| Microsoft Forms | Receive form responses |
| OneDrive for Business | Access uploaded files |
| SharePoint Online | Create list items and store documents |
| Common Data Service (Dataverse) | Store structured data and upload files |

# Authentication

Each connector uses embedded authentication managed through connection references:  
- shared\_microsoftforms  
- shared\_onedriveforbusiness  
- shared\_sharepointonline  
- shared\_commondataserviceforapps

# Folder Structure in SharePoint

• Source Path (OneDrive): /Apps/Microsoft Forms/Customer Form/Question/

• Target Folder (SharePoint): /Shared Documents/Waiting Approval/

# Custom Fields

Fields such as CustomerName, CustomerEmail, Address, and PhoneNumber are mapped to both SharePoint and Dataverse. Documents are stored in SharePoint, SharePoint attachments, and in Dataverse file fields.

# Best Practices

• Ensure SharePoint list and Dataverse table are pre-created.

• Validate file paths and field internal names.

• Enable concurrency control for heavy load scenarios.

• Use dynamic file path retrieval instead of static paths.