## Introduction

The Power Automate Studio Creation tool automatically sends a ticketing agreement to the client, creates their studio once it is signed, and sends the client a welcome letter to support a faster response time for new clients. This document will list and explain several of the features included in the Studio Creation tool, as well as listing the steps involved within the Power Automate flow used to run the process.

## Solution

The entire Power Automate process is found within the "Create Studio From Contract" Solution. The solution contains two flows, "Send Lead Contract" and "Update Lead/Studio, as well as connectors to Adobe Acrobat Sign, Excel Online (Business), and SharePoint.

The template named "Ticketing Agreement" in Adobe Acrobat Sign has 3 pre-filled fields before being sent to the client, lead_id, lead_name, and email. Lead_id and email are not visible to the signer while lead_name is filled in the first entry field.

An Excel spreadsheet named "Agreement Status" is found within the Ticketing Agreements folder in SharePoint here: Ticketing Agreements. The spreadsheet contains two separate tables, CreatedAgreement and SignedAgreement. CreatedAgreement logs the lead ID, agreement ID, lead name, file name, and date the file was sent. SignedAgreement logs the lead ID, agreement ID, lead name, signer email, file name, and date the file was signed.

The Ticketing Agreement folder in Sharepoint contains the spreadsheet as well as a folder where all the signed agreements will be automatically uploaded when the process is done. The completed agreement is named Ticketing Agreement_(Lead_Name)_(Date Signed).

## Send Lead Contract

The first Power Automate flow is triggered by the "Send Agreement" button found in the General Info tab of a new client's lead page.

**Trigger**

- When the flow is triggered, a manual POST request is made to https://prod-52.westus.logic.azure.com:443/workflows/51c0ef823a054470a36ec062cdb0ef8a/triggers/manual/paths/invoke?api-version=2016-06-01&sp=%2Ftriggers%2Fmanual%2Frun&sv=1.0&sig=...
  - This URL was auto-generated by Postman
- The request body receives lead_id, lead_name, and email as strings
  - {
      "type": "object",
      "properties": {
        "lead_id": {
          "type": "string"
        },
        "lead_name": {
          "type": "string"
        },

```
      "email": {
        "type": "string"
      }
    }
  }
```

**Action 1:** HTTP GET

- Gets hash of lead_id from https://api.drttix.com/support/lead/hash?id=[lead_id]

**Action 2:** Create an agreement from a library template and send for signature – Adobe Sign

- Uses Ticketing Agreement template from Adobe Sign and sends to the email from client's lead page for signature.

**Action 3:** Get the status of an agreement – Adobe Sign

**Action 4:** Delay

- 20 second delay to allow time for contract to be created before moving to next action

**Action 5:** Retrieve the Signing URL

**Action 6:** Add a row into a table – Excel

- Logs data for lead_id, agreement ID, lead_name, file name, and date created in CreatedAgreement table from spreadsheet

After the data is logged into Excel, this flow is done, and the contract needs to be signed.
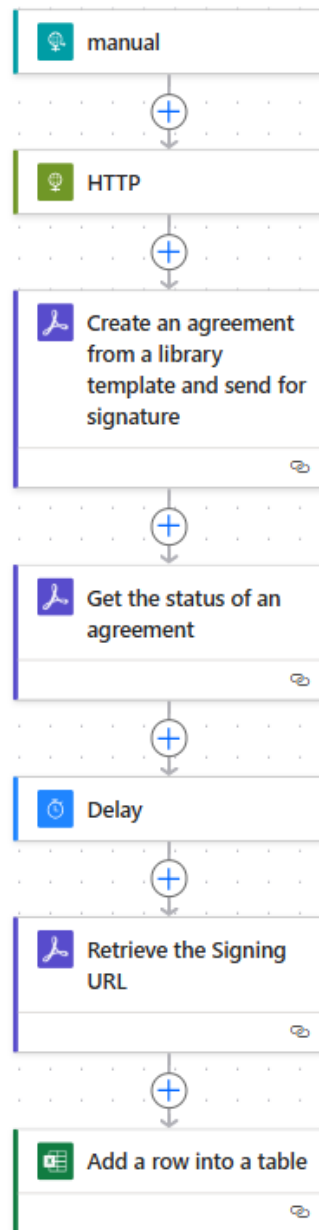
## Update Lead/Studio

Once the contract is signed, the Update Lead/Studio flow is triggered.

**Trigger:** When an agreement workflow is completed successfully – Adobe Sign

- Anytime an agreement is signed in Adobe Sign the flow is triggered

**Condition:** If Agreement Name is "DRT Ticketing Agreement", run flow

**Action 1:** Get form field data of agreement in JSON format – Adobe Sign

**Branch: Three different processes run at the same time at this step.**

**Branch A**

**Action A1:** Get a list of all the document IDs from an agreement – Adobe Sign

**Action A2:** Apply to each Loop

- Loops through each document in agreement

**Action A3:** Get a document from an agreement – Adobe Sign

- Gets all documents found in loop

**Action A4:** Create file – SharePoint

- Saves documents in SharePoint folder
- Formats file name to include lead_name and date signed

**Branch B**

**Action B1:** Compose "Lead ID"

- Retrieves only lead ID from form field data

**Action B2:** Compose "API Signature"

- Retrieves only API signature from form field data

**Action B3:** HTTP

- POST to lead page with lead ID and API signature

**Branch C**

**Action C1:** Compose "Form Field Data"

- Get all data from form fields in JSON format

**Action C2:** Get the status of an agreement – Adobe Sign

- Finds status of document, such as date signed

**Action C3:** For each Loop

- Loops through each Participant Set

**Action C4:** For each Loop 2

- Loops through each member

**Action C5:** Add a row into a table - Excel

- Adds data for each individual agreement into SignedAgreement table
- Lead ID, Agreement ID, Lead Name, Signer Email, File Name, Date Signed

Once this flow has completed successfully, the lead ID and API signature are used to create a studio and send the client a welcome letter using the email on their lead page.
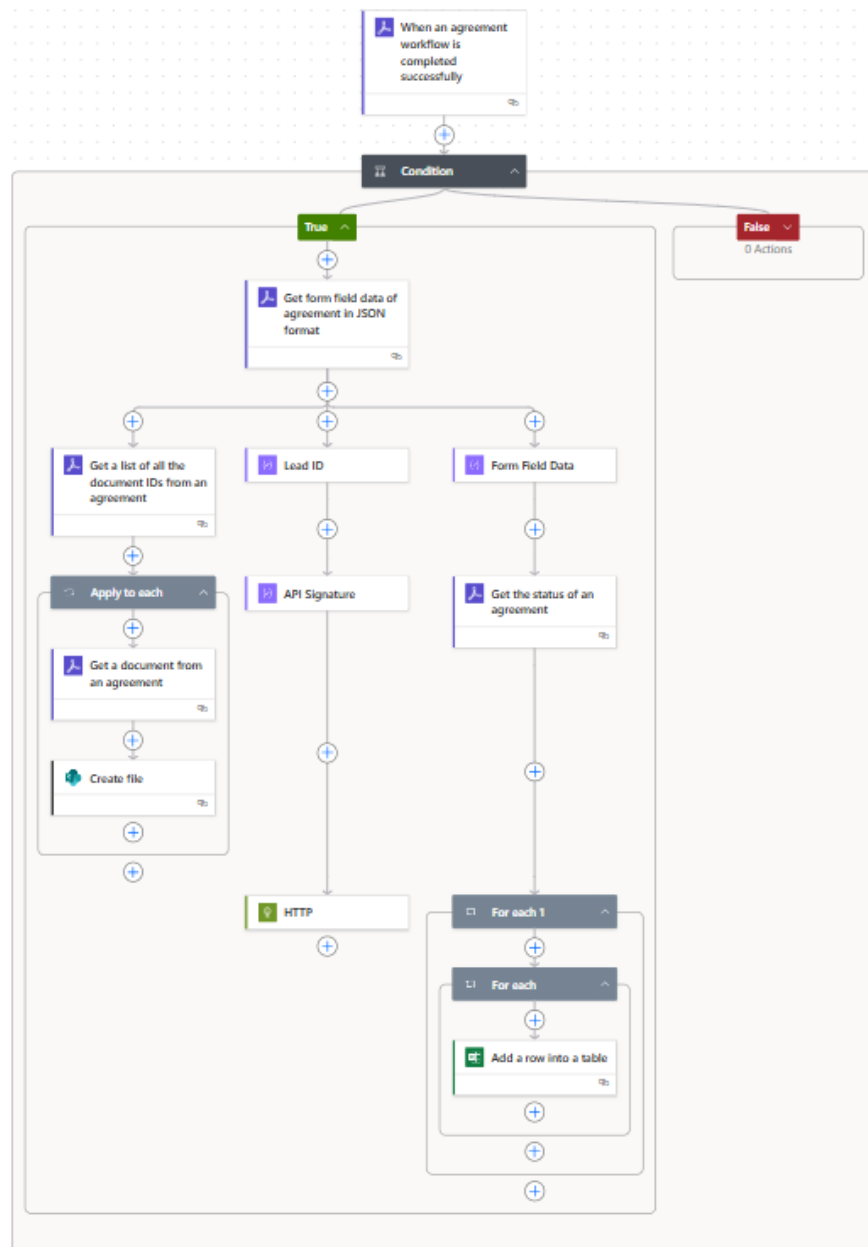
# Studio Creation

The Power Automate flow will conclude by sending this HTTP request to the DRT Support API.

https://api.drttix.com/support/lead

{

lead_id: number,

      signature: string

}

(NOTE: the request will fail if it does not have a valid DRT Support API key).

The Support API will create a new studio record, associate it to the provided lead, and create a stripe account. Then, it will generate a welcome letter and email it to the crm lead's email address.

NOTE: This means a signer may not receive the welcome letter to the signing email address.