P07: Capturing Leads from Microsoft Forms into Dataverse Using Power Automate

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Context

Item	Detail
Tag	Vertical Patterns | Power Apps
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Version Control	V1.0
Application Use Case	Capture lead data from a Microsoft Form and store it as a new lead record in Dataverse
Reference Usage	Automating lead capture from Microsoft Forms to Dataverse using Power Automate

Story Behind The Pattern

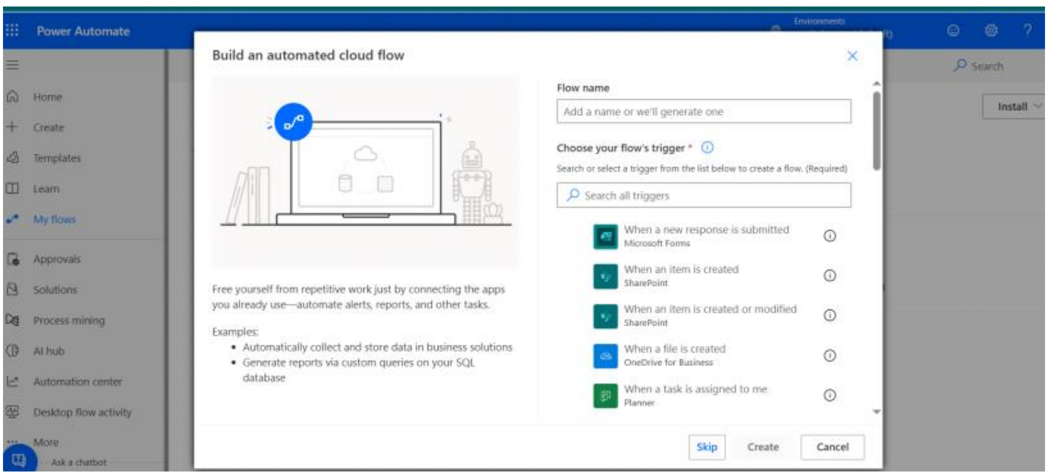
Item	Detail
The Problem	Manually entering lead data from Microsoft Forms into a CRM system like Dataverse is time-consuming and prone to errors.
The Solution	Create a Power Automate flow to automatically capture responses from a Microsoft Form and add them as new lead records in Dataverse.
Dependencies	Power Automate environment, Microsoft Forms, Dataverse with permissions to create flows and access forms/tables.

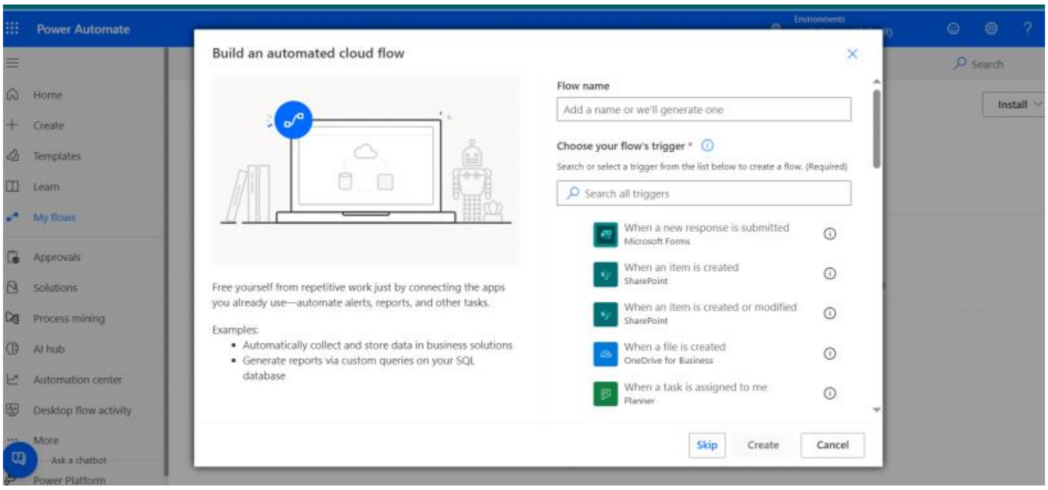
The Pattern

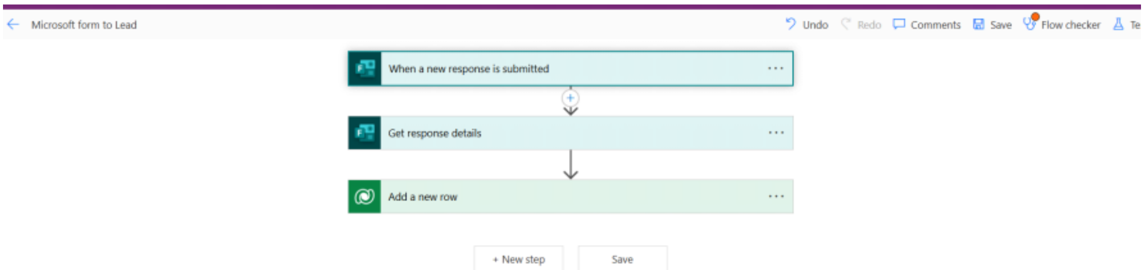
Method 1: Setting Up a Microsoft Forms to Lead Capture Flow

Here's a step-by-step guide to create a Power Automate flow that captures lead data from a Microsoft Form and adds it as a new row in the "Leads" table in Dataverse:

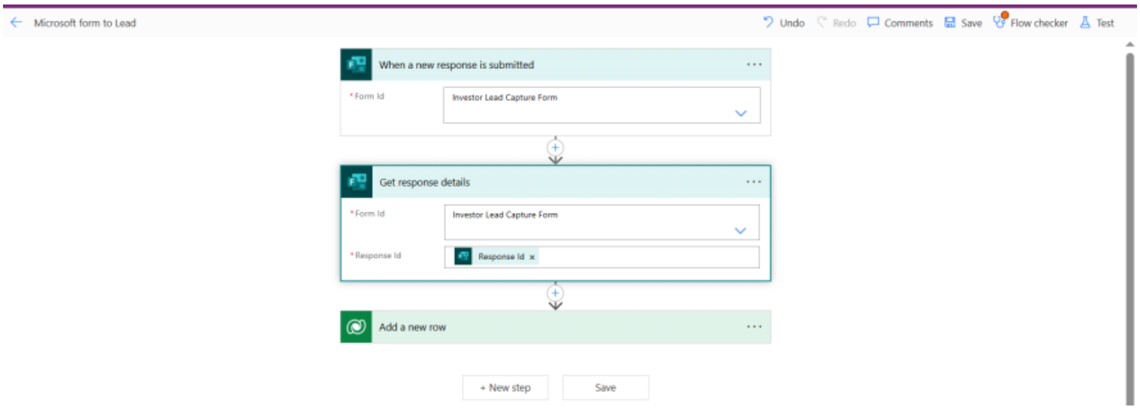
1. Create a New Flow in Power Automate
    - Log in to the Power Automate portal (make.powerautomate.com).
    - Click Create and select Automated cloud flow.
    - Name the flow (e.g., "Microsoft form to Lead") and click Create.
    - Choose the trigger When a new response is submitted from the Microsoft Forms connector.

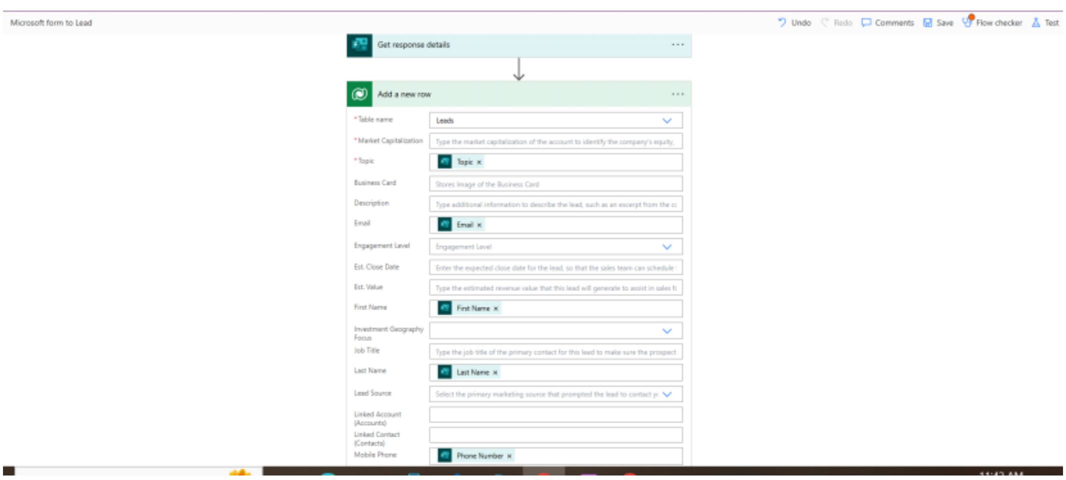




2. Configure the Trigger
    - In the trigger settings, set the following:
        - Form Id: Select "Investor Lead Capture FORM" from the dropdown (or the specific form you're using to capture leads).
    - Click Save to proceed. This trigger will activate the flow whenever a new response is submitted to the form.
    - 

3. Add a Get Response Details Action
    - Click + New step below the trigger.
    - Search for and select the Get response details action from the Microsoft Forms connector.
    - Configure the action:
        - Form Id: Select "Investor Lead Capture FORM" (same as the trigger).
        - Response Id: Select "Response Id" from the dynamic content of the trigger (this links the action to the specific form submission).
    - This step retrieves the details of the submitted form response, such as the lead's topic, email, first name, last name, and phone number.

- 

4. Add a New Row to the Leads Table
    - Click + New step below the Get response details action.
    - Search for and select Add a new row (Dataverse connector).
    - In the Table name field, select "Leads" (or create a new table with columns like "Topic," "Email," "First Name," "Last Name," and "Phone Number").
    - Configure the row details by mapping form responses to Dataverse fields:
        - Market Capitalization: Leave blank unless the form captures this data.
        - Topic: Select the form field for the lead topic (e.g., "Topic") from the Get response details output.
        - Business Card: Leave blank unless the form includes a file upload for a business card.
        - Description: Leave blank or add additional context if needed.
        - Email: Select the form field for the lead's email (e.g., "Email") from the Get response details output.
        - Engagement Level: Leave blank or set a default value (e.g., "Low").
        - Est. Close Date: Leave blank unless the form captures this.
        - Est. Revenue: Leave blank unless the form captures this.
        - First Name: Select the form field for the lead's first name (e.g., "First Name") from the Get response details output.
        - Investment Focus: Leave blank unless the form captures this.
        - Job Title: Leave blank unless the form captures this.
        - Last Name: Select the form field for the lead's last name (e.g., "Last Name") from the Get response details output.
        - Lead Source: Leave blank or set a default value (e.g., "Form Submission").
        - Linked Account(s): Leave blank unless the form links to an account.
        - Linked Contact(s): Leave blank unless the form links to a contact.
        - Phone Number: Select the form field for the lead's phone number (e.g., "Phone Number") from the Get response details output.
    - Click Save to store the lead record in Dataverse.
    - 

5. Test and Validate the Flow
   - Click Test in the flow editor and select Manually.
   - Submit a test response in the "Investor Lead Capture FORM" with sample data (e.g., Topic: "Investment Inquiry," Email: "lead@example.com," First Name: "John," Last Name: "Doe," Phone Number: "123-456-7890").
   - Check if the flow triggers and a new row is added to the "Leads" table in Dataverse.
   - Verify that the fields (e.g., Topic, Email, First Name, Last Name, Phone Number) match the form submission data.

6. Activate and Monitor the Flow
   - Once tested, click Save and then Turn on to activate the flow.
   - Monitor the flow runs in the Run history to ensure it executes without errors.
   - Adjust the flow (e.g., add error handling or additional fields) if issues arise.