P03: Create an Application on form submission with Workflows in Power Apps

Thursday, March 6, 2025 2:30 PM

Context

Item	Detail
Tag	Vertical Patterns | Power Apps
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Version Control	V1.0
Application Use Case	Automate the creation of an application record when a field changes
Reference Usage	Setting up workflows to automate repetitive tasks

Story Behind The Pattern

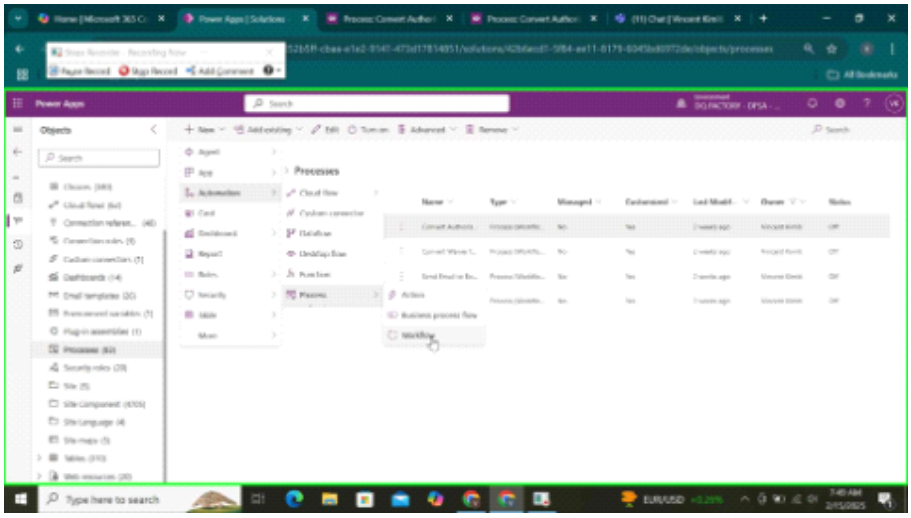
Item	Detail
The Problem	Manually creating and updating application records is time-consuming and error-prone.
The Solution	Use a workflow in Power Apps to automatically create and update application records when a specific field changes.
Dependencies	Power Apps or Dynamics 365 environment, access to create workflows, a table (e.g., "Applications") with relevant fields.

The Pattern

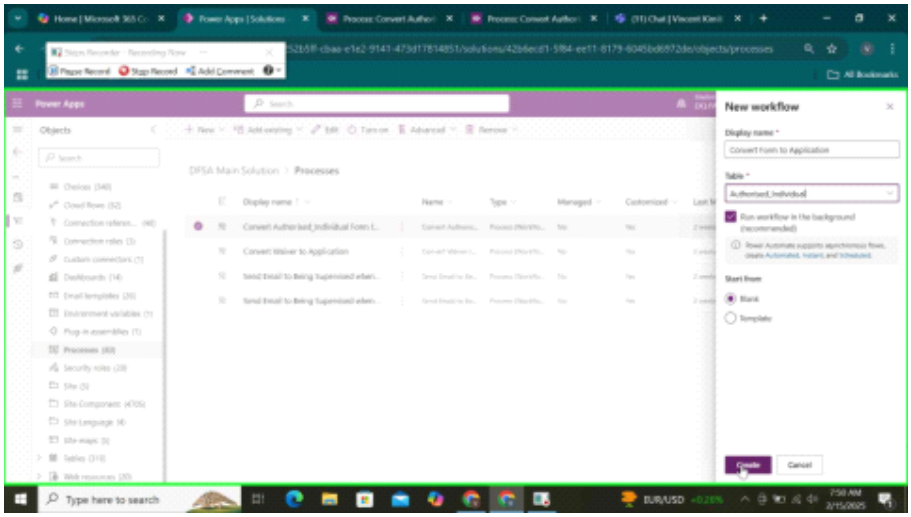
Method: Automating Application Creation with Workflows

Here's a step-by-step guide for setting up a workflow in Power Apps to automate the creation of an application record when a specific field changes:

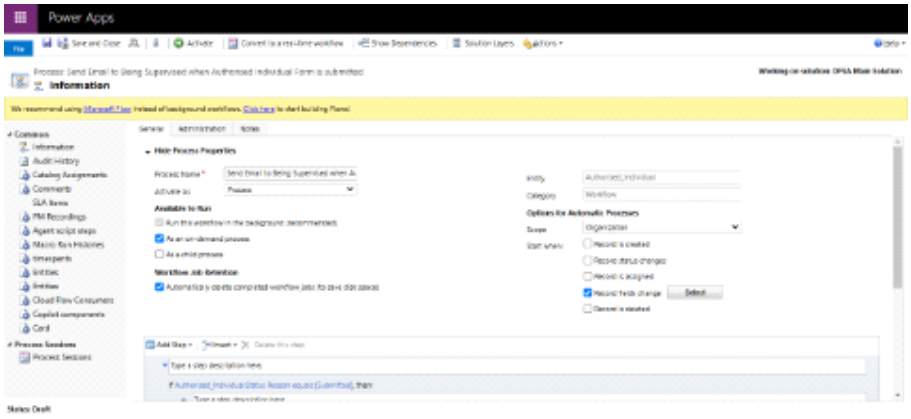
1. Initialize New Workflow Creation in Power Apps
    - Log in to your Power Apps or Dynamics 365 environment.
    - Navigate to the Solutions area in the Power Apps Maker Portal.
    - Select or create a solution where you want to add the workflow.
    - In the solution, click New > Automation > Workflow to start creating a new workflow.



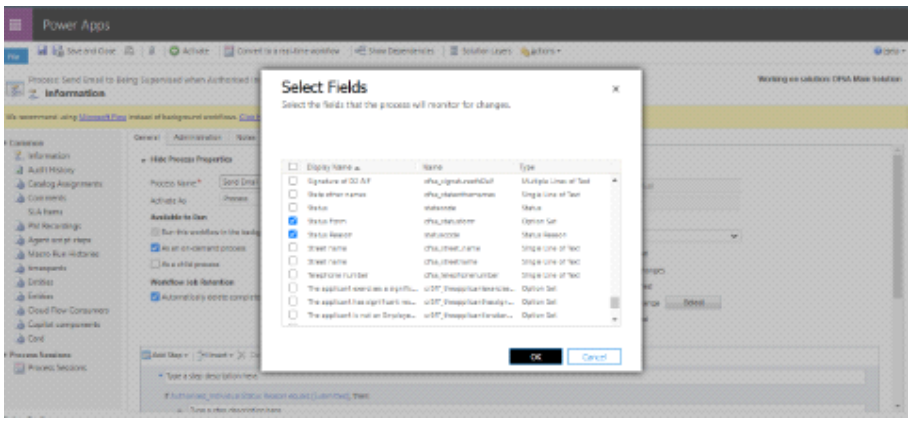
2. Provide a Name for the Workflow and Select the Table to Use
    - In the workflow editor, provide a meaningful name for the workflow, such as "Automate Application Creation."
    - Select the table (entity) that the workflow will be associated with. For example, choose the "Applications" table if you're automating application record creation.
    - Ensure the table has the necessary fields (e.g., status, name, or other fields you'll use for triggering or updating).



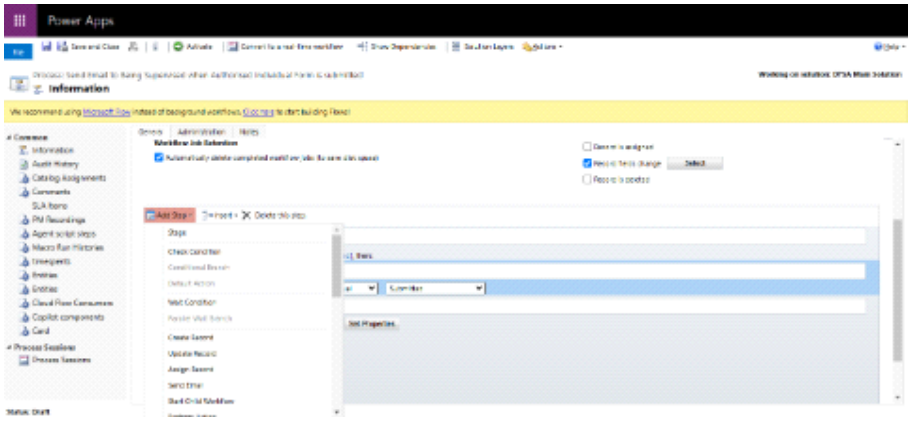
3. Set as an On-Demand Process and Trigger on Record Field Change
    - In the workflow properties, check the box for Run this workflow in the background (asynchronous) if you want it to run without user intervention.
    - Additionally, enable the workflow to run as an on-demand process by checking the box for "Available to run on demand."
    - Set the trigger for the workflow by selecting Record fields change under the "Start when" section.



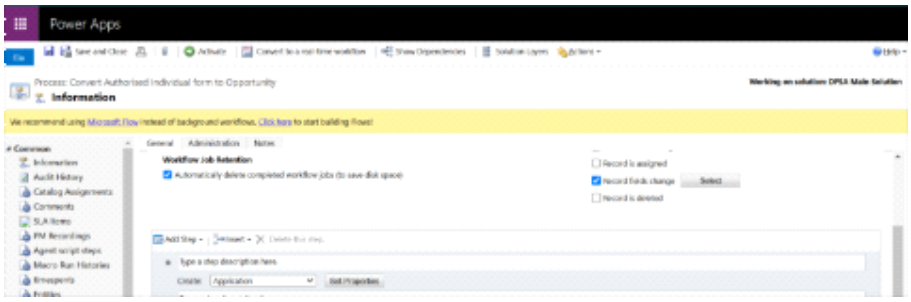
4. Set the Field Change to Trigger the Process
    - In the "Record fields change" section, specify the field that will trigger the workflow. For example, if the workflow should run when the "Status" field of an application changes, select the "Status" field from the list.
    - Save the trigger settings to ensure the workflow activates when this field is updated.



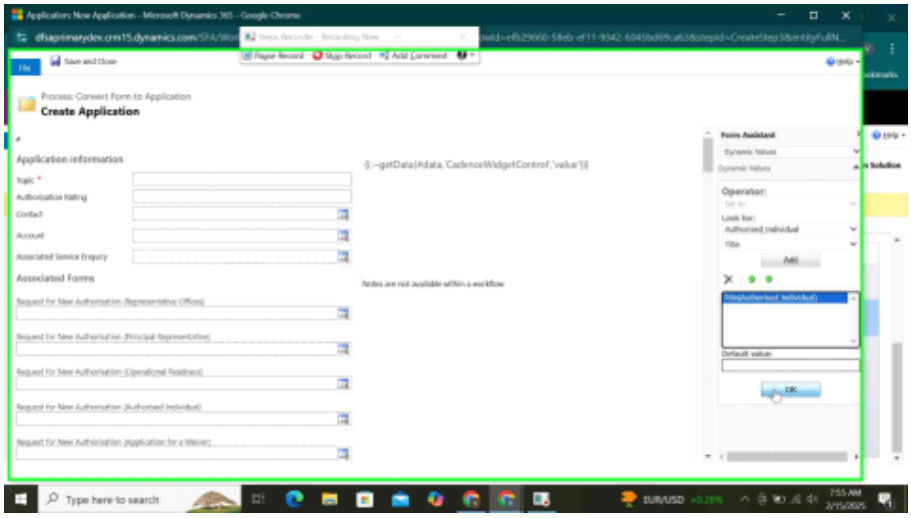
5. Add Steps to Be Implemented When the Process Runs (Create an Application)
    - In the workflow editor, click Add Step to define the actions the workflow will perform.
    - Select Create a new record as the action.
    - Choose the "Applications" table (or the relevant table) as the record type to create.



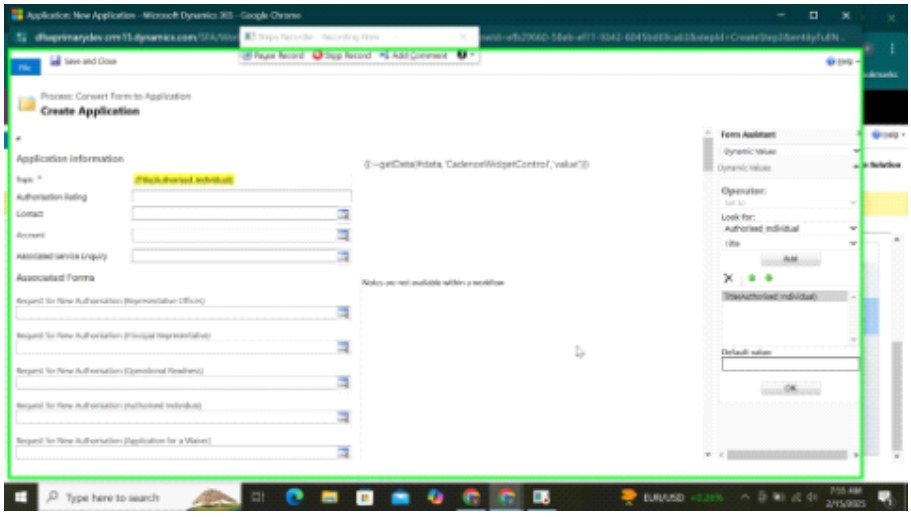
6. Set the Application Properties
    - In the "Create a new record" step, configure the properties of the new application record.
    - Map the fields of the new application record, such as "Application Name," "Created By," or "Status," to appropriate values.
    - For static values, you can manually enter data (e.g., set "Status" to "Pending").



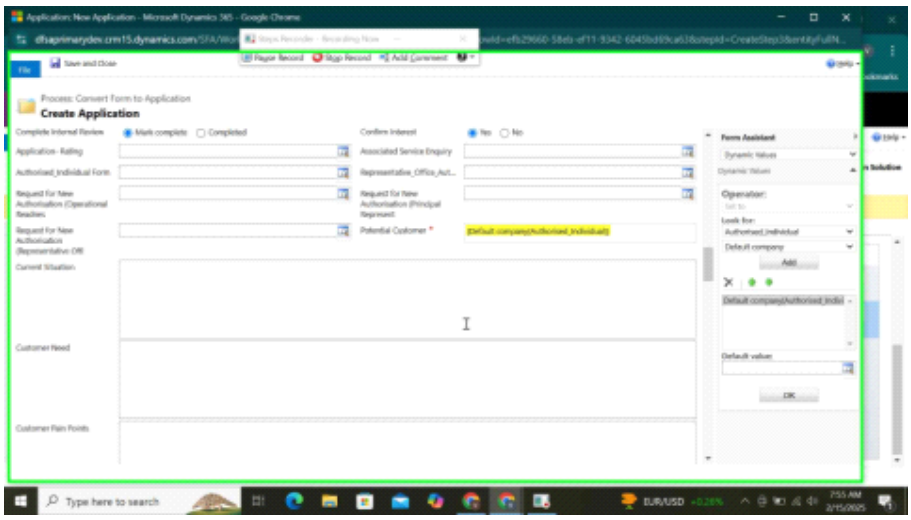
7. Set the Dynamic Values for the Application Fields
    - For fields that need dynamic values, use the Dynamic Content or Form Assistant in the workflow editor.
    - For example, if the "Application Name" should be based on the record that triggered the workflow, select the corresponding field (e.g., "Name" from the triggering record) and map it to the new application's "Application Name" field.
    - Similarly, you can set the "Created By" field to the user who modified the record by selecting the "Modified By" field from the triggering record.



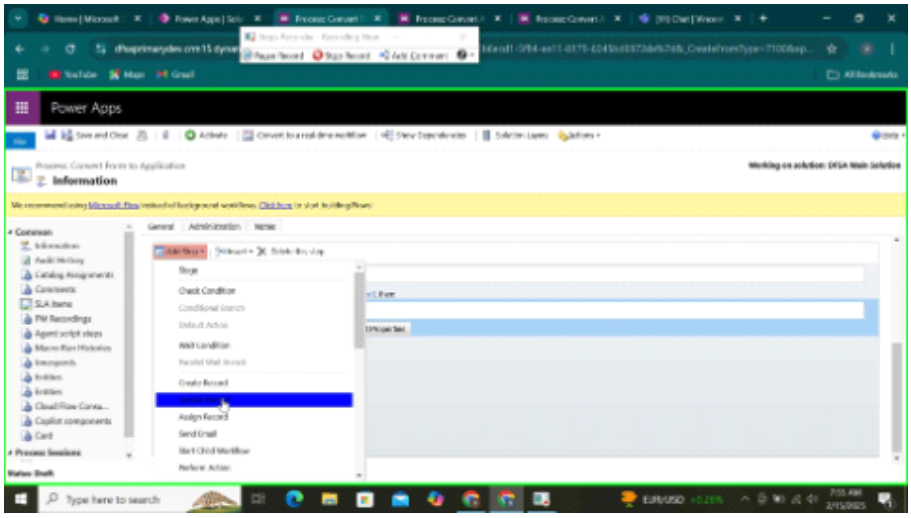
8. Define Additional Properties for the Application
    - Add any additional fields that need to be populated in the new application record.
    - For example, set a "Priority" field to "High" if the triggering record meets certain conditions (you can add a condition step prior to this action if needed).
    - Ensure all required fields in the "Applications" table are filled to avoid errors during record creation.



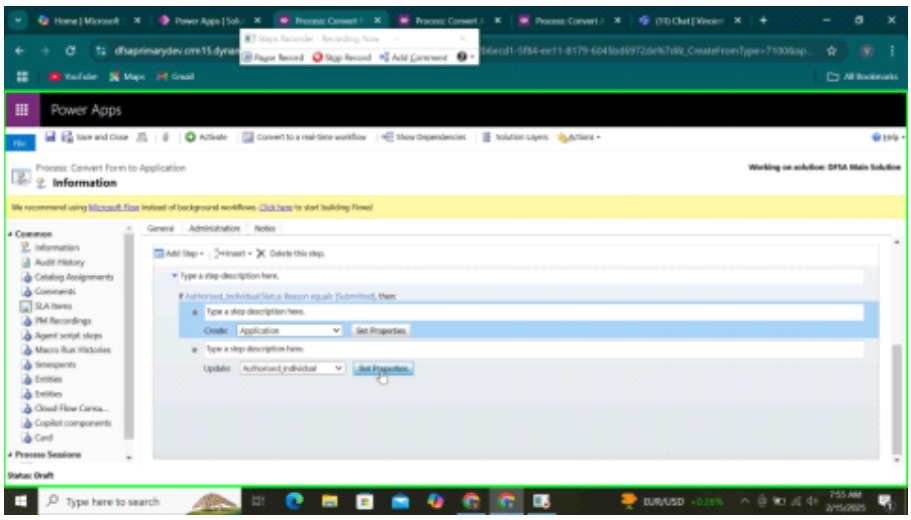
9. Add a Condition Check Before Proceeding (Assumption for "See Below")
    - Add a Check Condition step to ensure the workflow only proceeds if certain criteria are met.
    - For example, check if the "Status" field of the triggering record is set to "Approved" before creating the new application record.
    - If the condition is not met, the workflow can stop or perform an alternative action (e.g., send a notification).



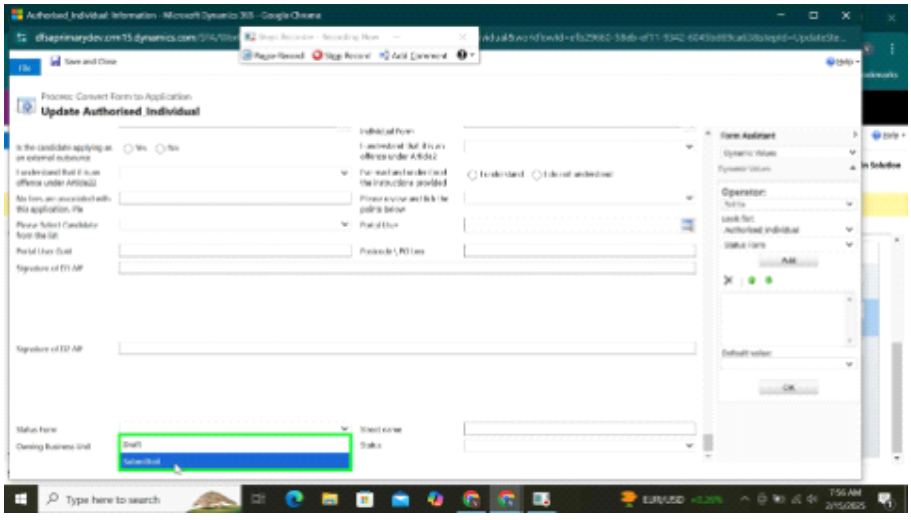
10. Add Action to Be Taken on Application Creation
    - After creating the application record, add another step to perform an action on the newly created record.
    - For example, select Update a record to modify the newly created application record (or the triggering record, depending on your use case).



11. Set the Update Properties
    - In the "Update a record" step, select the record to update (e.g., the newly created application record).
    - Specify the fields to update. For example, set the "Status" field to "In Progress" to indicate the application is being processed.

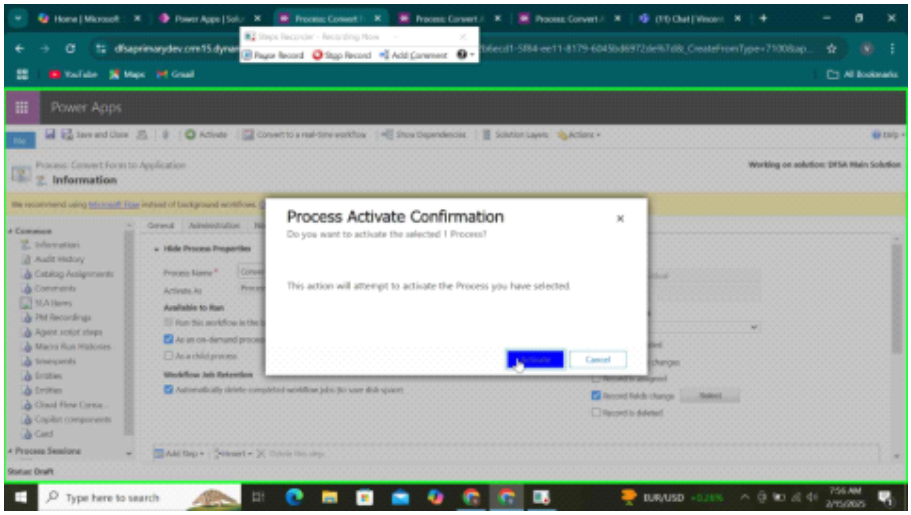


12. Set the Field to Be Updated
    - In the update step, map the field to be updated with the desired value.
    - For example, if updating the "Status" field, select "In Progress" from the dropdown or use a dynamic value based on the workflow's context.



13. Add a Notification Step (Assumption for "See Below")
    - Add a step to notify the team about the new application record.
    - Select Send an email as the action (if email notifications are enabled in your environment).
    - Configure the email to include details like the "Application Name," "Status," and a link to the record, and send it to the relevant team or user (e.g., the "Created By" user).

14. Activate the Process
    - Once all steps are configured, click Save to save the workflow.
    - Click Activate to enable the workflow. This will make it active and ready to run when the specified field changes or when triggered on demand.
    - Test the workflow by updating a record in the "Applications" table and verifying that a new application record is created and updated as expected.


Power Apps
Process Activate Confirmation
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