P04: Sending Email on Form Submission with Workflows in Power Apps

Thursday, March 6, 2025 3:30 PM

Context

Item	Detail
Tag	Vertical Patterns | Power Apps
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Version Control	V1.0
Application Use Case	Send an email notification when a form submission triggers a condition
Reference Usage	Setting up workflows to automate email notifications

Story Behind The Pattern

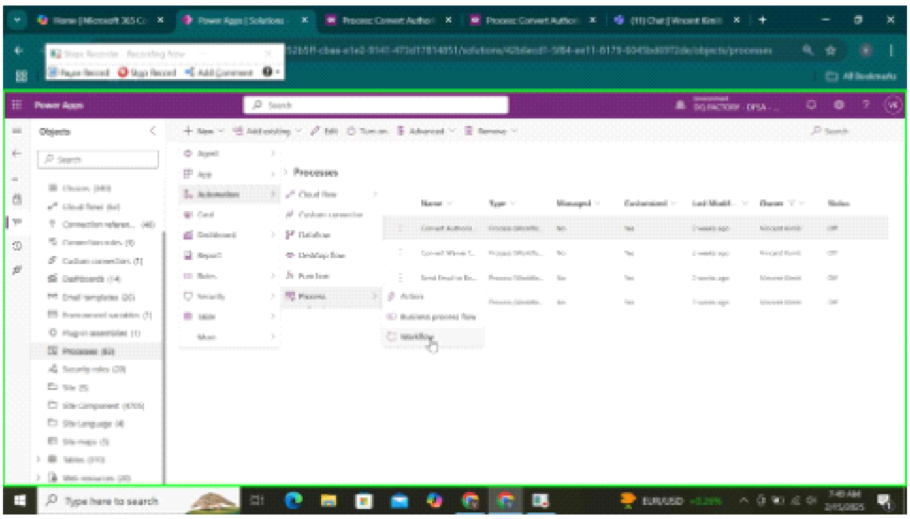
Item	Detail
The Problem	Teams need to be promptly notified of form submissions, to avoid delays in follow-up actions.
The Solution	Create a workflow in Power Apps to send an email notification when a form submission meets a specific condition and update the record status.
Dependencies	Power Apps or Dynamics 365 environment, access to create workflows, a table (e.g., "Form Submissions") with relevant fields, email configuration.

The Pattern

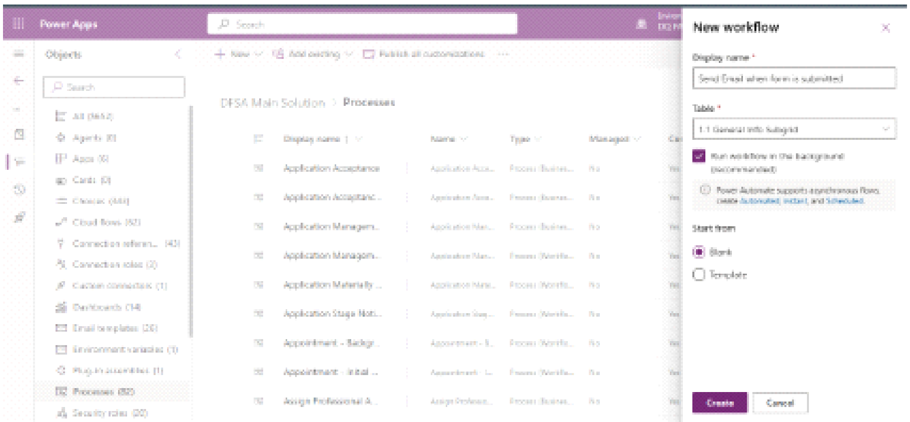
Method: Sending Email on Form Submission

Here's a step-by-step guide for setting up a workflow in Power Apps to send an email notification when a form submission meets a condition and updates the record status:

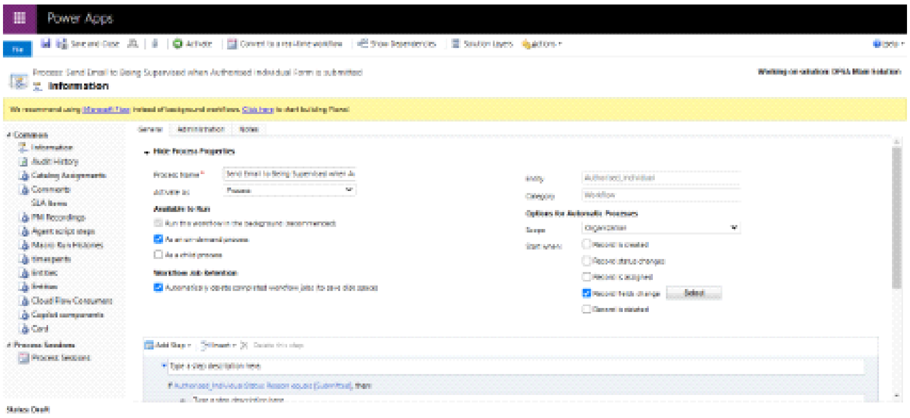
1. Initialize New Workflow Creation in Power Apps
    - Log in to your Power Apps or Dynamics 365 environment.
    - Navigate to the Solutions area in the Power Apps Maker Portal.
    - Select or create a solution where you want to add the workflow.
    - In the solution, click New > Automation > Workflow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



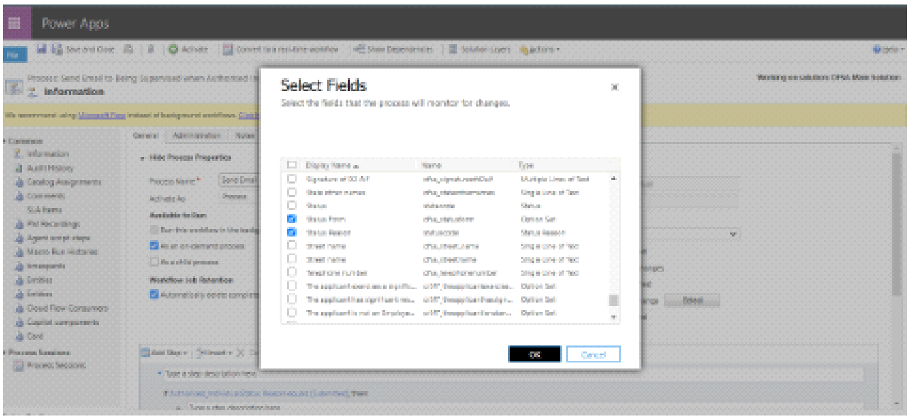
2. Provide a Name for the Workflow and Select the Table to Use
    - In the workflow editor, provide a meaningful name for the workflow, such as "Send Email on Form Submission."
    - Select the table (entity) that the workflow will be associated with. For example, choose the "Form Submissions" table if you're tracking form submissions.
    - Ensure the table has fields like "Submission Status" or "Submitted By" that will be used for triggering and updating.



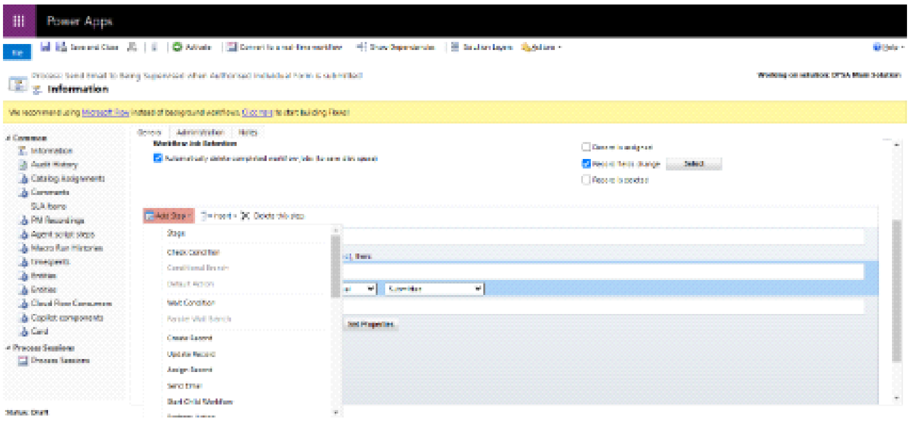
3. Set as an On-Demand Process and Trigger on Record Field Change
    - In the workflow properties, check the box for Run this workflow in the background (asynchronous) if you want it to run without user intervention.
    - Enable the workflow to run as an on-demand process by checking the box for "Available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



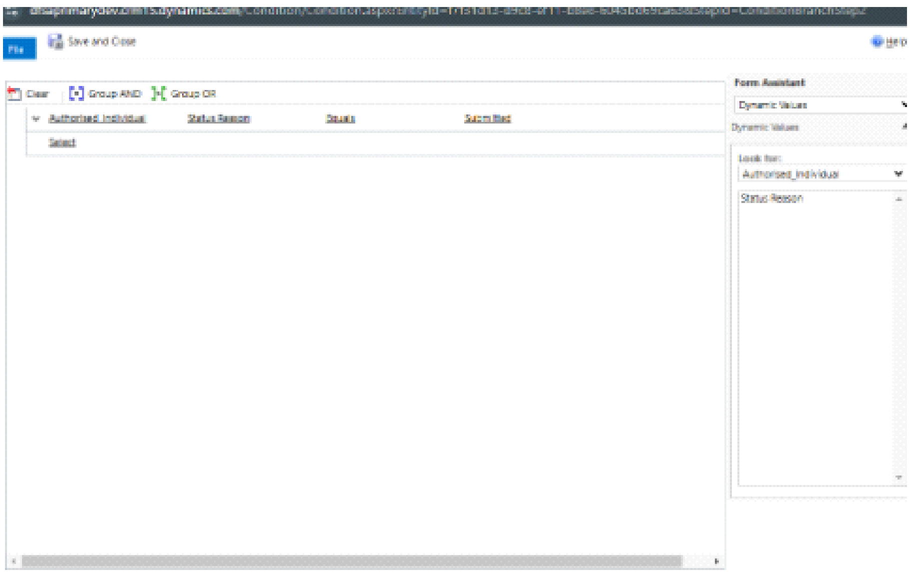
4. Set the Field Change to Trigger the Process
    - In the "Record fields change" section, specify the field that will trigger the workflow. For example, if the workflow should run when the "Submission Status" field changes to "Submitted," select the "Submission Status" field.
    - Optionally, add a condition to trigger only when the field value equals "Submitted."
    - Save the trigger settings to ensure the workflow activates on the specified change.



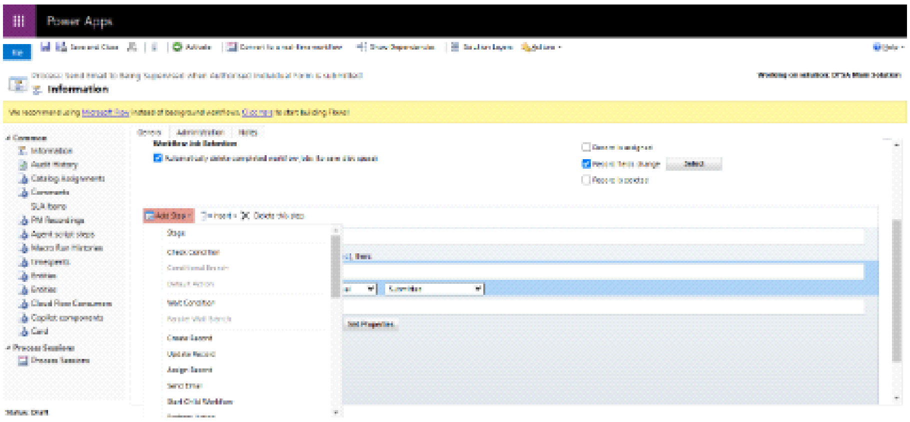
5. Add Steps to Be Implemented When the Process Runs (Add a Condition)
    - In the workflow editor, click Add Step to define the actions.
    - Select Check Condition to add a condition that must be met before proceeding.
    - This condition will determine whether the email should be sent (e.g., based on the "Submission Status").



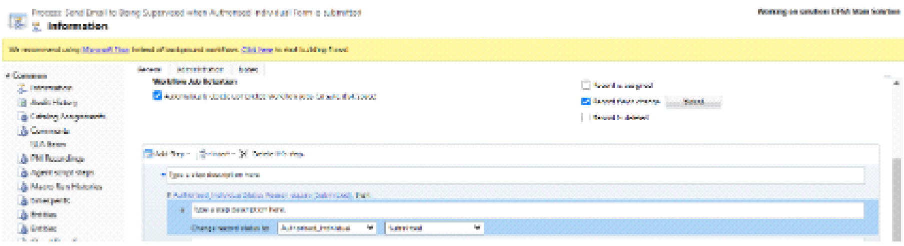
6. Set the Condition to Be Met
    - In the "Check Condition" step, configure the condition. For example, set it to check if the "Submission Status" field equals "Submitted."
    - Use the Dynamic Content or Form Assistant to select the field and value.
    - If the condition is met, the workflow will proceed to the next step; otherwise, it will stop.



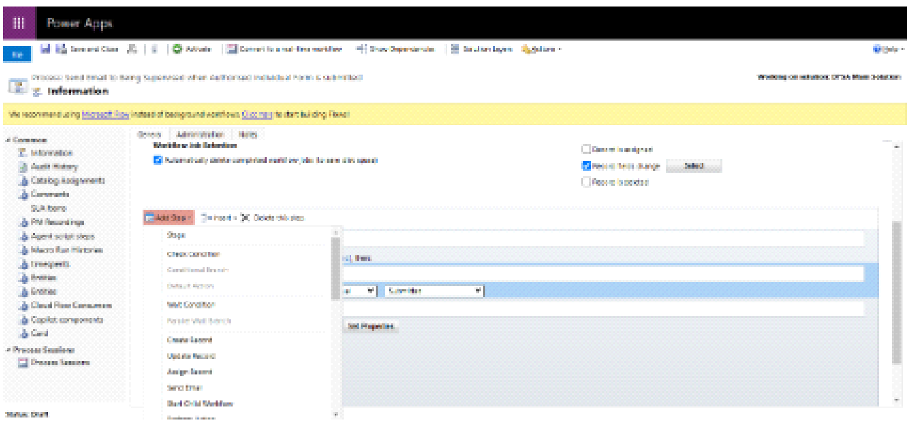
7. Set the Action to Be Taken When Condition Is Met (Update Record Status)
   - In the "If Yes" branch of the condition, add an action by clicking Add Step.
   - Select Update a record to modify the status of the triggering record.
   - Choose the "Form Submissions" table and select the current record as the one to update.



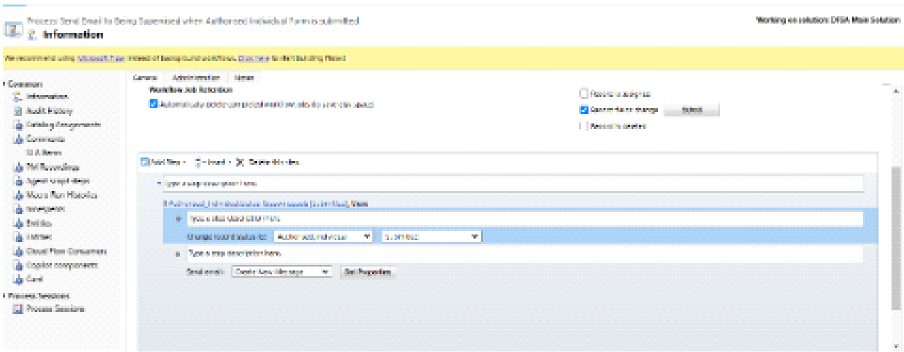
8. Set the Record Status to Be Updated
   - In the "Update a record" step, map the "Submission Status" field to a new value, such as "Processed" or "Notification Sent."
   - Save the update settings to ensure the record status reflects the action taken.



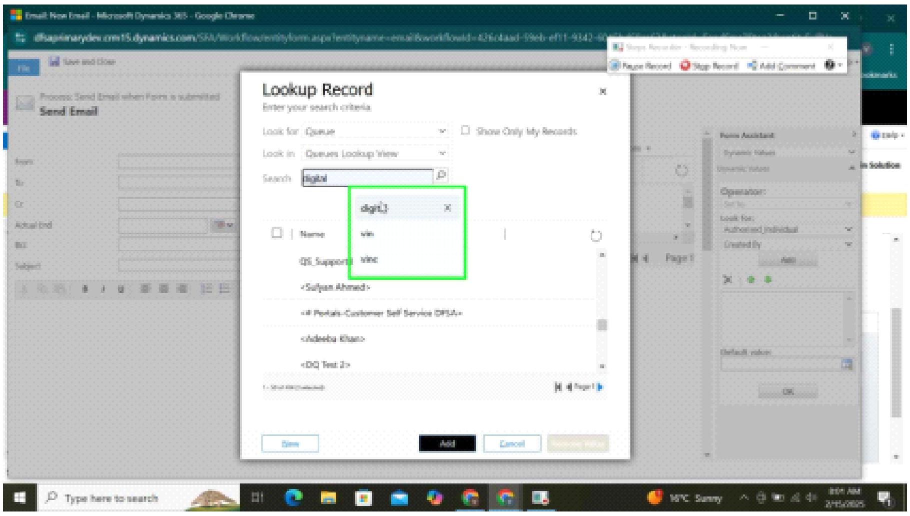
9. Add Next Action to Be Followed (Send Email)
   - After the update step, click Add Step again.
   - Select Send an email as the action to notify the team about the form submission.



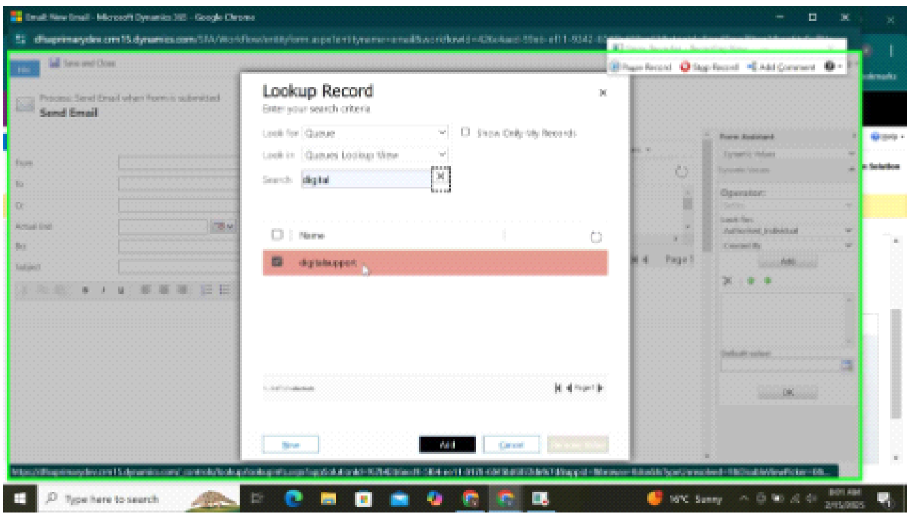
10. Set Email Properties
    - In the "Send an email" step, configure the general email properties.
    - Ensure the email is enabled for the environment (requires email configuration in Power Apps or Dynamics 365).
    - Leave the "From," "To," "Subject," and "Message" fields blank for now, as they will be set in subsequent steps.



11. Set the Email From Property
    - In the "From" field of the email step, specify the sender. This could be a system email address (e.g., "notifications@yourdomain.com") or the user who submitted the form (using a dynamic value like "Created By").
    - Follow the dialogue box that appears to authenticate or select the sender email address.

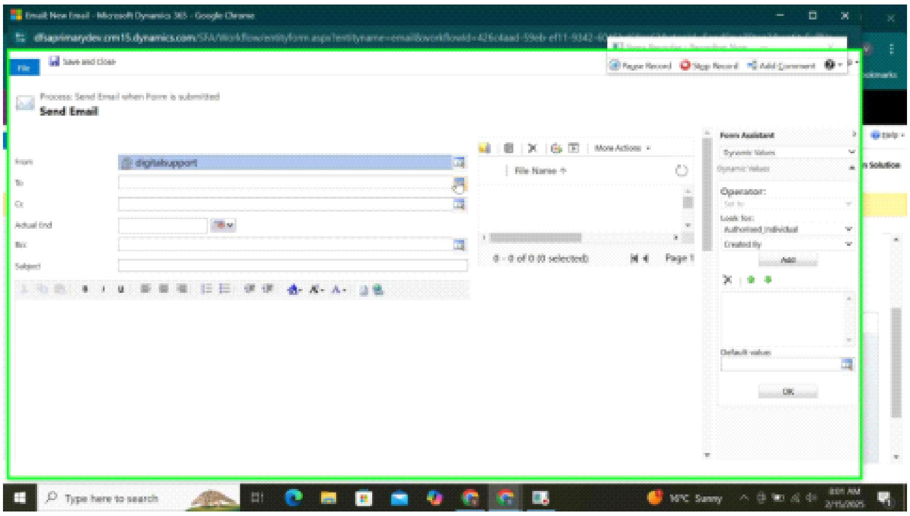


12. Follow the Dialogue Box to Achieve This
    - If a dialogue box appears (e.g., for email authentication or selection), follow the prompts to sign in or choose the appropriate email account.
    - Ensure the account has permissions to send emails from the Power Apps environment.

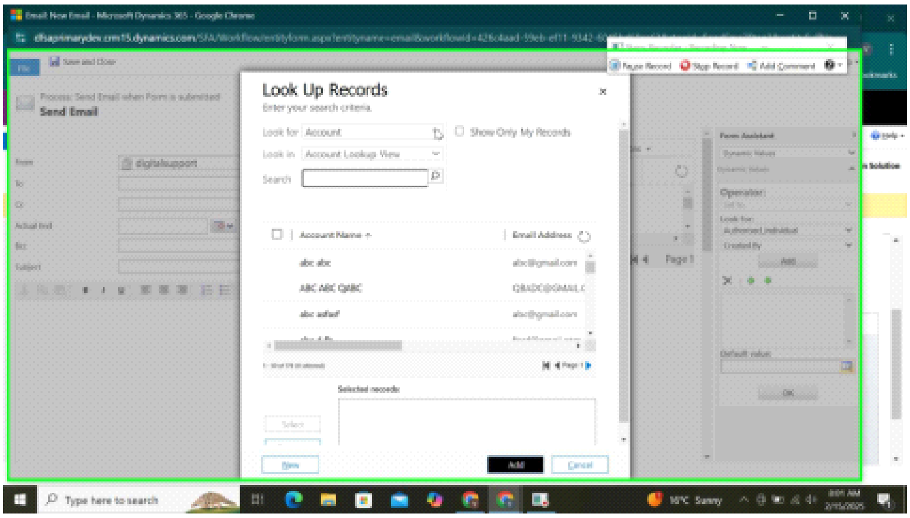


13. Set the ‘To’ Field Property
    - In the "To" field of the email step, specify the recipient(s). This could be a fixed email address (e.g., "team@yourdomain.com") or a dynamic value (e.g., the "Manager" field

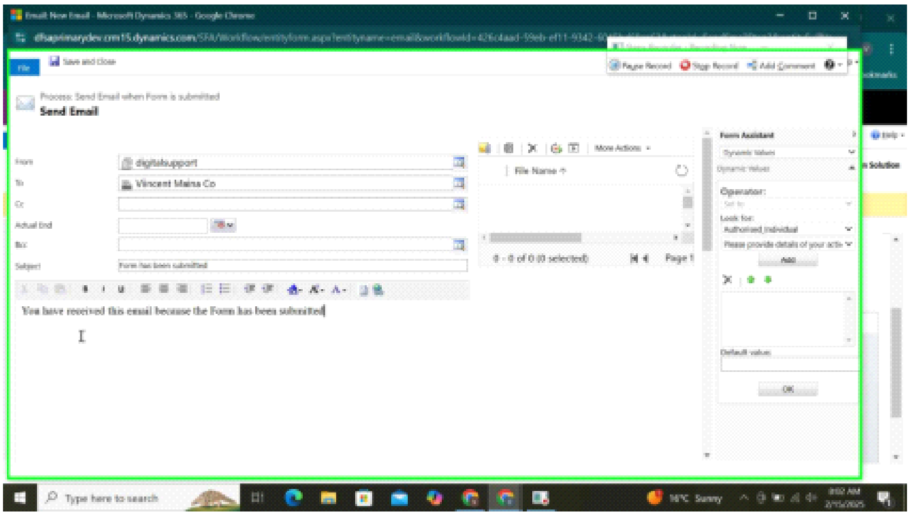
from the triggering record).
- Use the dialogue box or dynamic content to select the recipient.



14. Set the Field from the Dialogue Box
    - If using a dynamic value for the "To" field, follow the dialogue box to map it to a field (e.g., "Submitted By" or a custom "Notification Email" field).
    - Verify the selection to ensure the correct recipient is populated.

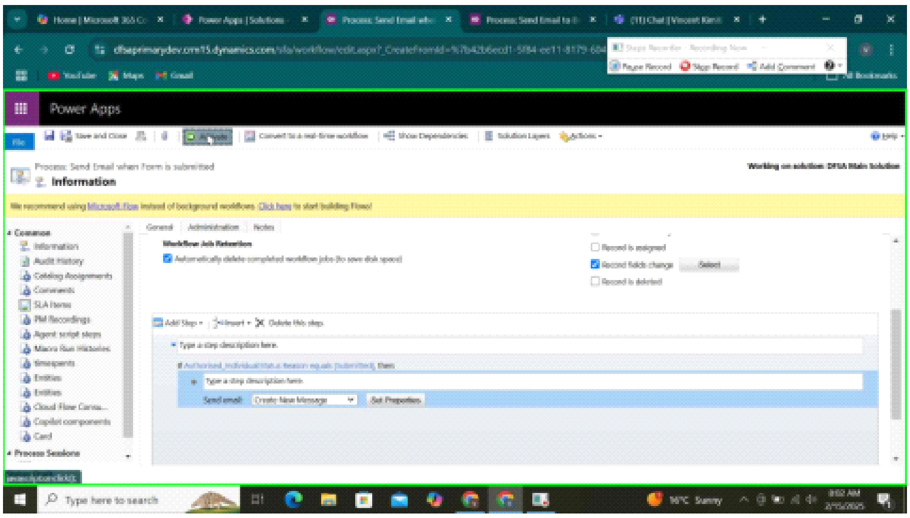


15. Set the Subject and Message Property
    - In the "Subject" field, enter a clear subject line, such as "New Form Submission Processed."
    - In the "Message" field, compose the email body. For example:
        - "Dear Team, a new form submission has been processed. Details: [Dynamic field: Submission Name]. Status: [Dynamic field: Submission Status]."
    - Use dynamic content to insert field values from the triggering record.

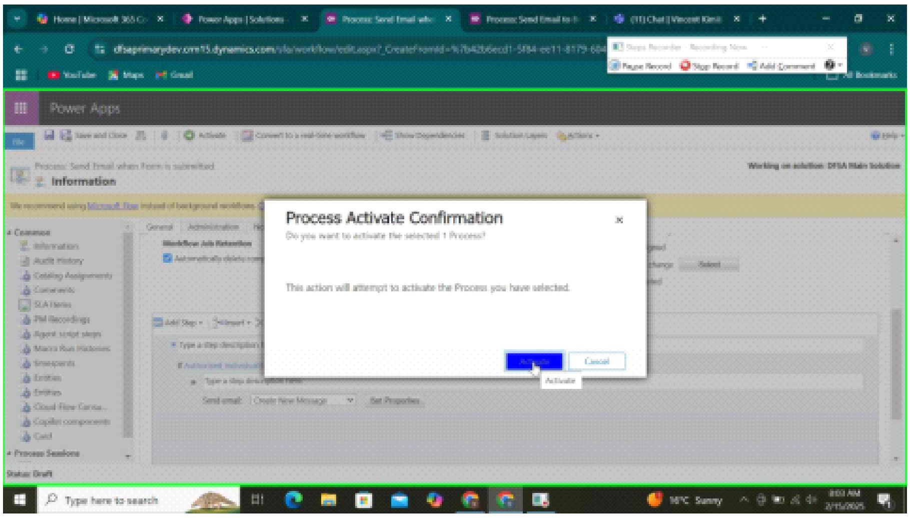


16. Add a Confirmation Step
    - Add a final step to log the email action, such as Create a record in a "Workflow Logs" table.
    - Set the log entry to include the workflow name, timestamp, and email recipient (e.g., "Email sent to [To] at [Timestamp]").
    - This step ensures a record of the notification for auditing purposes.

17. Activate the Process
    - Once all steps are configured, click Save to save the workflow.
    - Click Activate to enable the workflow. This makes it active and ready to run when the specified field changes or when triggered on demand.
    - Test the workflow by updating a record’s "Submission Status" to "Submitted" and verifying that the email is sent and the status updates.



18. Done
    - The workflow is now fully set up and active. Monitor the process over time to ensure it runs as expected.
    - If issues arise, review the workflow logs or deactivate and edit the workflow as needed.


Process Activate Confirmation
Do you want to activate the selected 1 Process?
This action will attempt to activate the Process you have selected.
Activate
Cancel
Power Apps
Information