

# **im going to move onto these eventually give me the explanation and steps before i go in depth: Integrate with Power Apps to allow mobile approvals or data entry.**

Use AI Builder in Power Automate for document processing (e.g., automate invoice extraction).

Connect to third-party apps (Slack, Salesforce, Dropbox) for seamless workflows

Here's a clear overview and step-by-step explanation of the three advanced integrations you mentioned. These steps will help you understand the process before you dive deeper into each area.

## **1. Integrate Power Apps for Mobile Approvals or Data Entry**

### **What it is:**

Power Apps lets you build custom mobile apps for tasks like submitting requests or entering data. When combined with Power Automate, you can trigger approval workflows and automate business processes from your phone.

### **How it works:**

- Users fill out a form or submit a request in a Power Apps mobile app.
- This triggers a Power Automate flow, which can start an approval process, notify approvers, and update records.

### **Basic Steps:**

#### **1. Design Your Power App:**

- Use Power Apps to create a form for data entry or request submission (e.g., expense approval, leave request) <sup>[1]</sup>.

#### **2. Connect Data Sources:**

- Link your app to data sources like SharePoint, Excel, or SQL.

#### **3. Build an Approval Flow:**

- In Power Automate, create a new flow that starts when a user submits a form in Power Apps <sup>[2]</sup> <sup>[3]</sup>.
- Add approval steps (e.g., send to manager for approval).

#### **4. Mobile Experience:**

- Users and approvers can interact with the app and approve or reject requests on their mobile devices using the Power Apps or Power Automate mobile app<sup>[4]</sup> <sup>[5]</sup>.

## 5. Automated Updates:

- Once approved/rejected, the flow can update records, send notifications, or trigger other actions.

## 2. Use AI Builder in Power Automate for Document Processing (e.g., Invoice Extraction)

### What it is:

AI Builder is a no-code AI tool in Power Platform. It can extract data from documents like invoices automatically, reducing manual data entry.

### How it works:

- When a document (like an invoice PDF) is uploaded, Power Automate uses AI Builder to extract key information (invoice number, dates, totals, etc.) and saves it to your database or triggers further actions.

### Basic Steps:

#### 1. Create/Select an AI Model:

- Use the prebuilt invoice processing model in AI Builder, or train a custom model for your specific document type<sup>[6]</sup> <sup>[7]</sup> <sup>[8]</sup>.

#### 2. Set Up a Power Automate Flow:

- Create a flow that triggers when a document is uploaded (e.g., to SharePoint or via email)<sup>[9]</sup> <sup>[8]</sup>.

#### 3. Add AI Builder Action:

- Insert the “Extract information from invoices” action and map the incoming document to it<sup>[6]</sup>.

#### 4. Process Extracted Data:

- Use the extracted fields (like invoice total, vendor, dates) in subsequent steps—save to SharePoint, send for approval, or enter into your accounting system<sup>[9]</sup> <sup>[8]</sup>.

#### 5. Automate Notifications/Approvals:

- Optionally, trigger notifications or approval workflows based on the extracted data.

## 3. Connect to Third-Party Apps (Slack, Salesforce, Dropbox) for Seamless Workflows

### What it is:

Power Platform (Power Automate, Power Apps) supports hundreds of connectors to third-party services, enabling you to automate tasks across tools like Slack, Salesforce, Dropbox, and more.

## How it works:

- You can trigger flows based on events in these apps (e.g., new file in Dropbox, new lead in Salesforce, message in Slack) or send data/actions to them from your Microsoft environment.

## Basic Steps:

### 1. Find/Add a Connector:

- In Power Automate or Power Apps, search for the connector for your third-party app (Slack, Salesforce, Dropbox) <sup>[10]</sup> <sup>[11]</sup>.

### 2. Authenticate:

- Sign in and authorize access to the third-party service.

### 3. Set Up Triggers and Actions:

- Choose what will start your workflow (e.g., new message in Slack, new file in Dropbox, new record in Salesforce) <sup>[12]</sup> <sup>[13]</sup>.
- Define actions (e.g., send notification, update record, copy file).

### 4. Build and Test the Flow:

- Combine actions as needed (e.g., when a new invoice is uploaded to Dropbox, extract data with AI Builder, then send a Slack alert).

### 5. Use Custom Connectors (Advanced):

- If a built-in connector doesn't exist, you can create a custom connector to connect to almost any API <sup>[10]</sup>.

## Summary Table

Integration Type	Key Benefit	Typical Steps
Power Apps + Automate	Mobile data entry & approvals	Build app → Connect data → Add approval flow
AI Builder in Automate	Document data extraction (AI)	Create model → Build flow → Extract/process data
Third-party Connectors	Cross-platform automation	Add connector → Authenticate → Build/test workflow

**These integrations allow you to automate approvals, extract data from documents, and connect your Microsoft tools with the rest of your business apps—making your processes faster, more accurate, and less reliant on manual effort.**



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