User Guide MS Forms
to Creatio Connector

This guide enables you to seamlessly connect your Microsoft Forms via Power Automate with your Creatio data, allowing you to create automated and efficient workflows for processing form data.

1 **Create / Choose your Microsoft Form**
Build your MS Form with all the required fields/questions or choose an existing one.
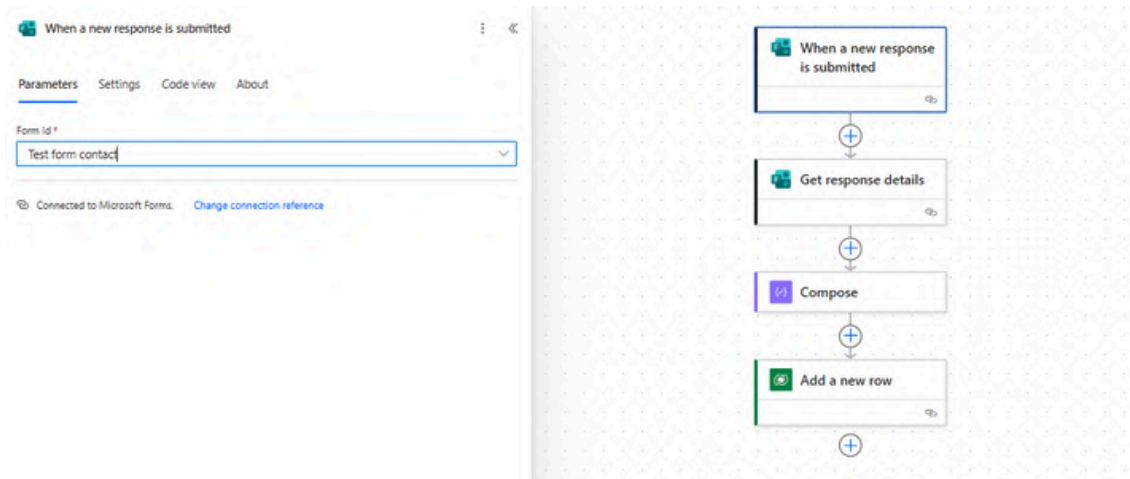
2 **Update the "Test Form Submission" flow within Power Automate**
In Power Automate you should find your flow in "Shared with me" tab:
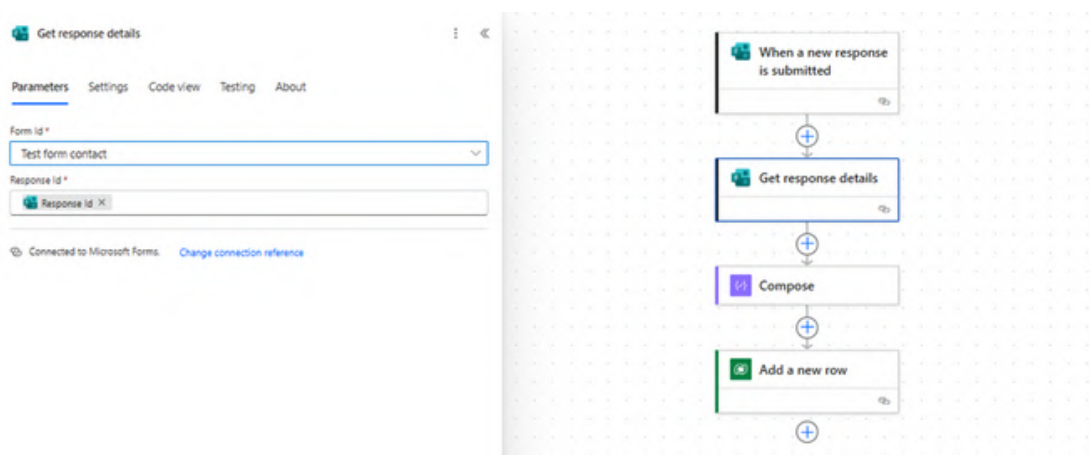
- Open the "***Test Form Submission***" flow.
- Click Edit.
- Locate the first step titled "***When a new response is submitted***".
- In the Form Id dropdown, select your Microsoft Form.
    - If your form is not visible:
        - Click "Change connection reference".
        - Choose "+ Add new connection" and sign in using your account that owns the form.
    - Make sure the selected form matches the one you intend to map.

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○ This trigger ensures the flow activates every time a user submits a response to your chosen form

- Scroll down to the "***Get response details***" step:
  ○ Change the connection here as well.
  ○ Set the Form Id to the same Microsoft Form used in the trigger above.

- Click **Save** and **Publish** the flow once all changes are made.

3 **Update the "Forms to Creatio Connector" Flow**

In Power Automate you should find your flow (Share with me):

- Open the "***Forms to Creatio Connector***" flow.
  - Click on Edit
  - Click on the first stepe: "***When a new response is submitted***" trigger: Select the **same Form Id** used in the Test Form Submission flow.

- In the "***Get response details***" action: Also select the same form.

- Both steps must use the same Form ID to ensure a correct mapping and right data retrieval.
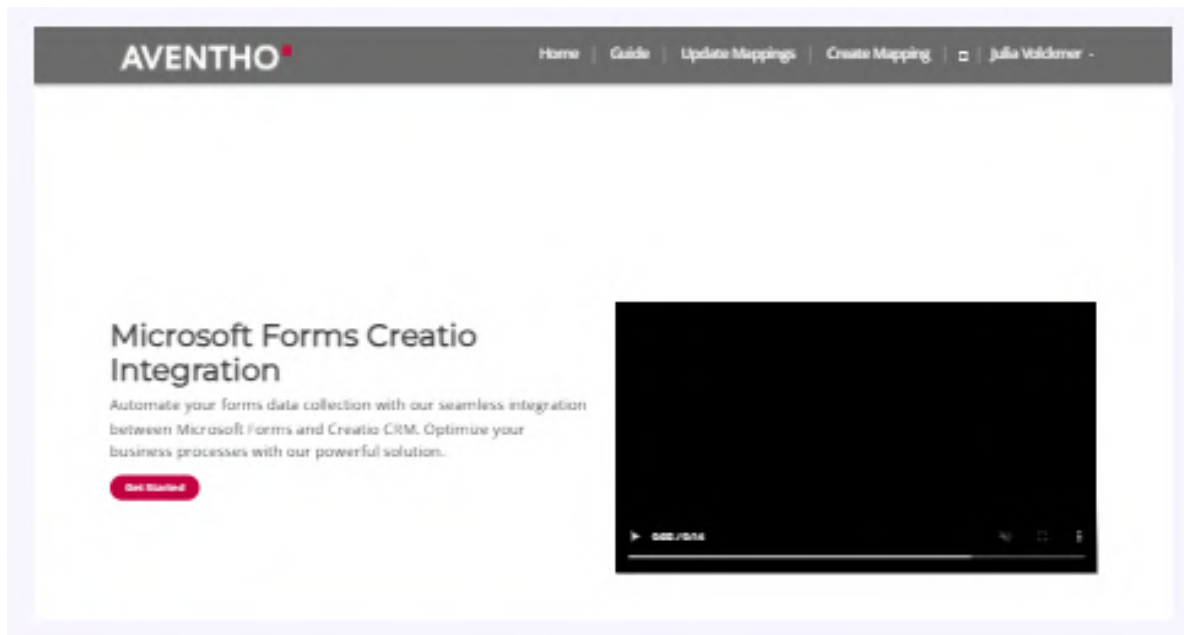- Click **Save** and **Publish** the flow.

4 **Submit the Form Once**
Go to your chosen Microsoft Form and fill out the form once to generate a test response. This helps us fetch the field IDs for you to map the data fields later.

5 **Go to Power Pages and look for the site URL that ends with** **".powerappsportals.com"**
- Open the Site
- Click on the "**Create Mapping**" menu item on top

6 **Enter Mapping Details**

Map Microsoft Form to Creatio

Form Name:

Enter your form name

Form ID:

Enter your form id

Creatio Object:

Select Creatio Object ⌄

Mapped Fields:

[✛ Add Mapping Row] [ID Show MS Field IDs] [💾 Save Mapping]

- Enter the **Form Name** and **Form ID**.
- click "**Show MS Field IDs**".

Question IDs   ✕ Close

- **Form ID:** _j76aJ7o8UmXqd4UFV6SEUg9Gkja_QtNiHeBlzl3XNVUOEM4WlBBOFY0QUZEMkdBMkYzUDdNUTVKTS4u 📋

- **r63e69c2026c242dcaaeee51b00c08fc1:** Test123 📋

- **r3e24ffc0c1444732a855cd68834ce520:** Test@gmail.com 📋

- **r151c4a7520b049088f7b06709ccd3e99:** Female 📋

- **r247d5466c86d4c758b1813eccf06e4da:** +491234567890 📋

- **r5d4909ab1d304008b33a3164f1a4bb8e:** Germany 📋

- This displays the list of field/question IDs generated by your form and the last submitted example so that you can recognize it easier.
- You can click the copy icon to easily copy any Form ID or Question ID.

7 **Select Creatio Object**
Choose the relevant Creatio object from the dropdown.

8 **Map each Microsoft Form field to its corresponding Creatio field**
For each row:
- Enter the MS Form Field Label (e.g., "Email")
- Enter the Question ID (retrieved from the form response). Use the copy symbol to copy it.
- Select the matching Creatio Field from the dropdown.

You can click "Add Mapping Row" to add more field mappings as needed.

9   Save the Mapping

Click "**Save Mapping**" to store the configuration in Dataverse.

You are now all set, and all future submits for your form will be transferred to the right object (e.g. contact) in Creatio!

For each new form you want to integrate, repeat the same process - create the form or choose the existing one, configure both flows, submit a test response, and complete the mapping via Power Pages.

How to change your mappings

10 **To Update or Delete a Mapping, Use the "Update Mappings" Page**
If you want to update or delete a saved mapping:
- Go to the **"Update Mappings"** page from the top menu
- Find the form you want to manage
- Click **"Update"** to edit the mapping
- Or click **"Delete"** to permanently remove the mapping from Dataverse