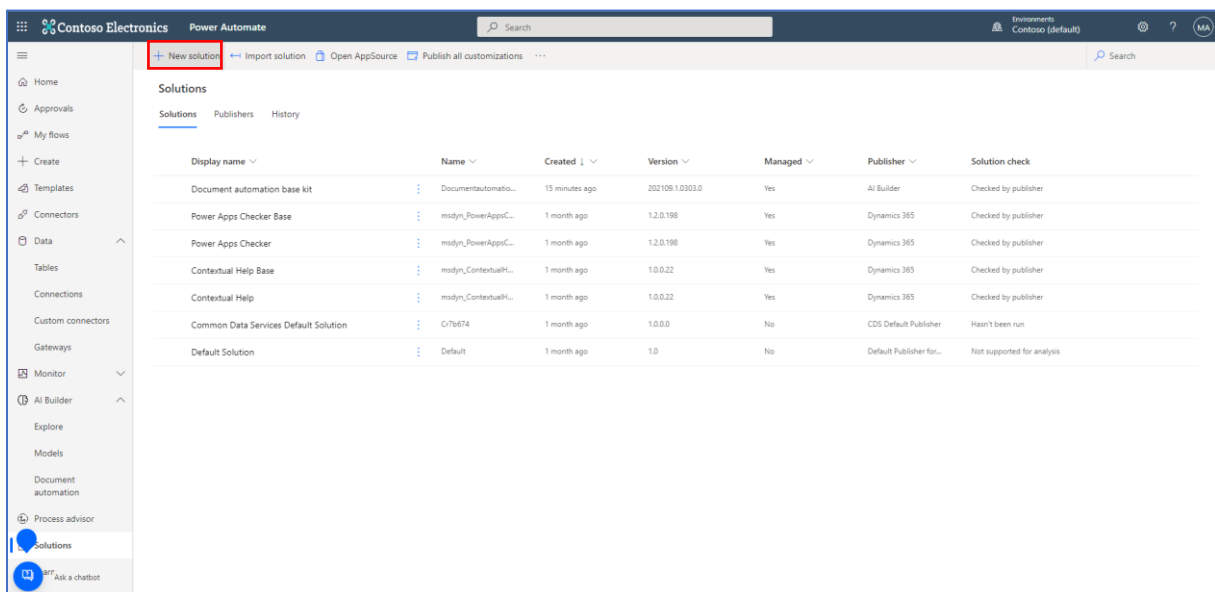


# Updating the Power Automate Document Automation kit to support multiple document types in the environment

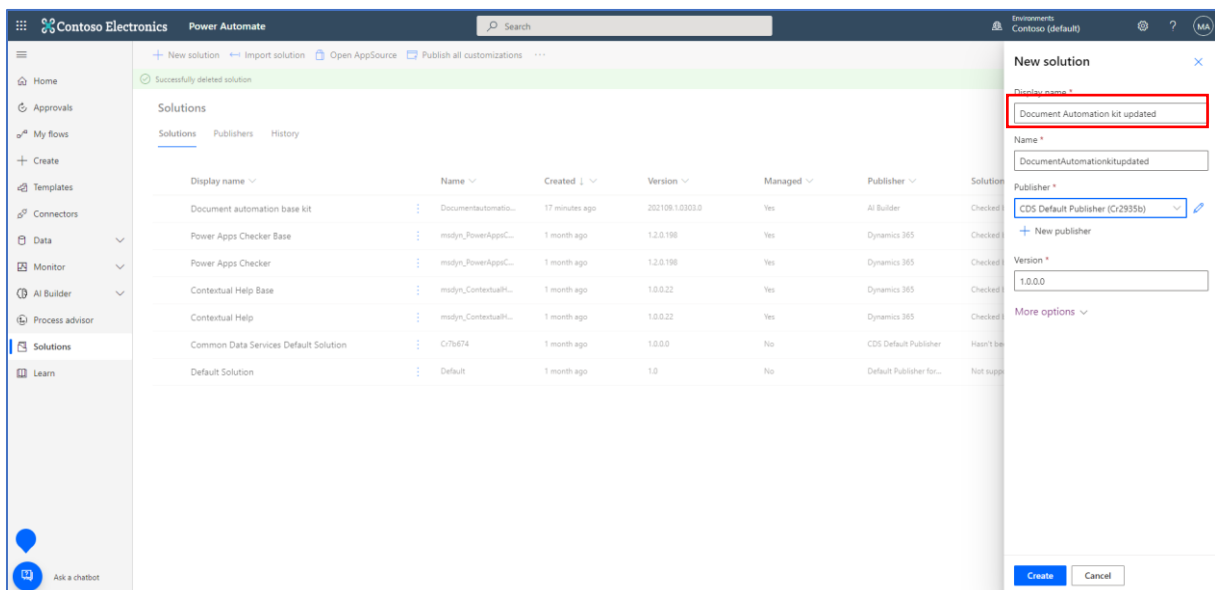
10/14/2022, Cedrick Bellarosa

We are going to create a new solution that will contain our customizations

Create a new solution

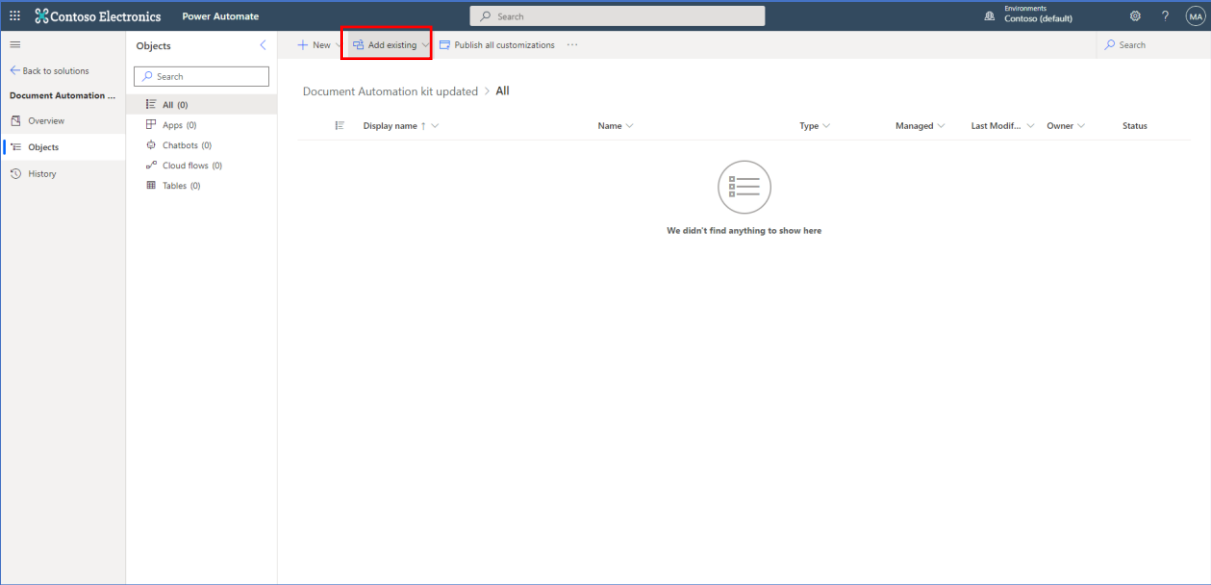


Name your solution and select "Create"

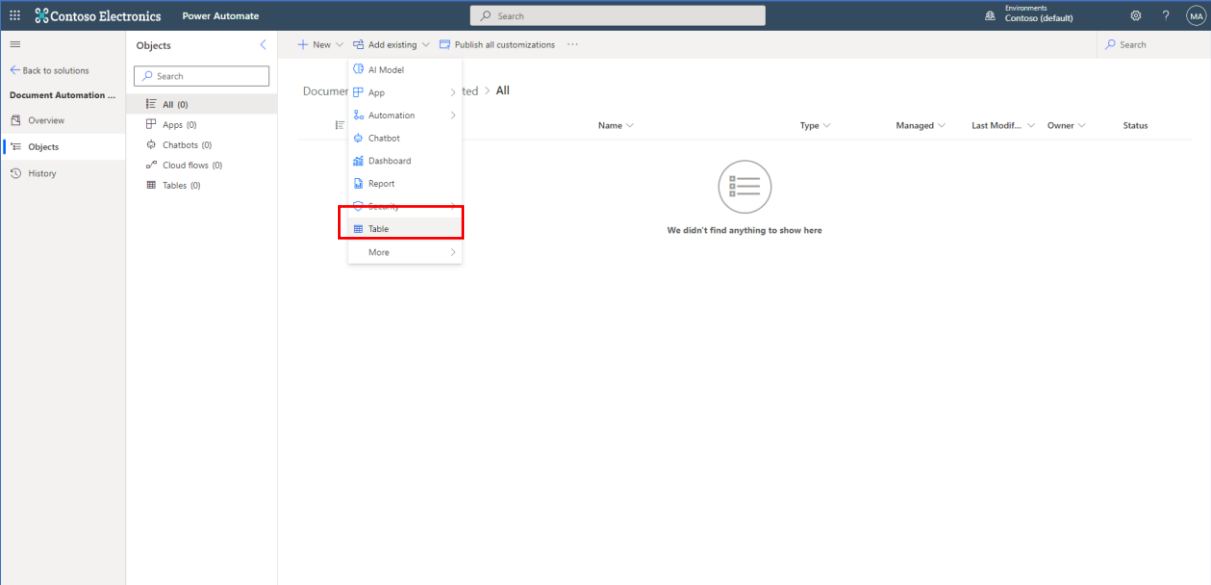


We are going to create a Dataverse choice to define the various document types

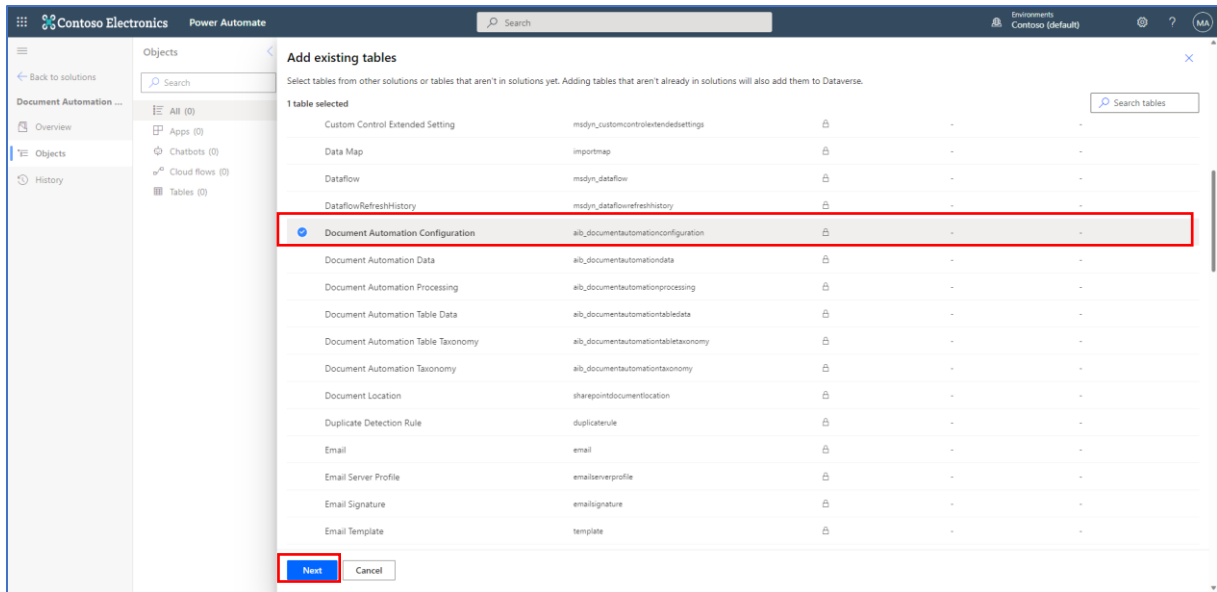
Select "Add existing"



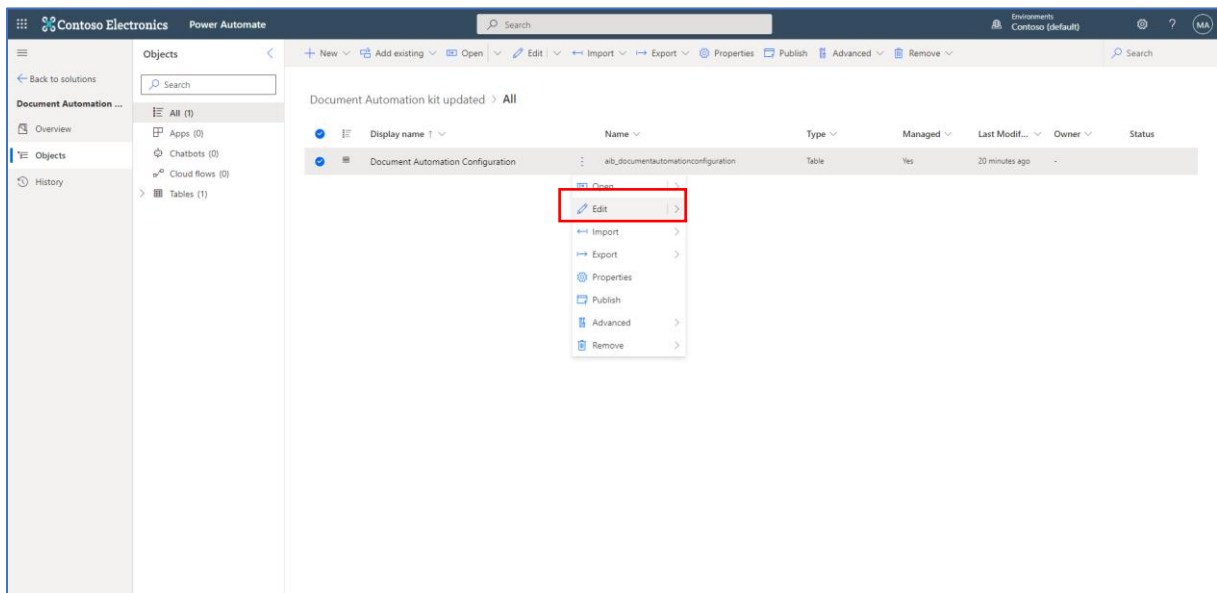
Then select table



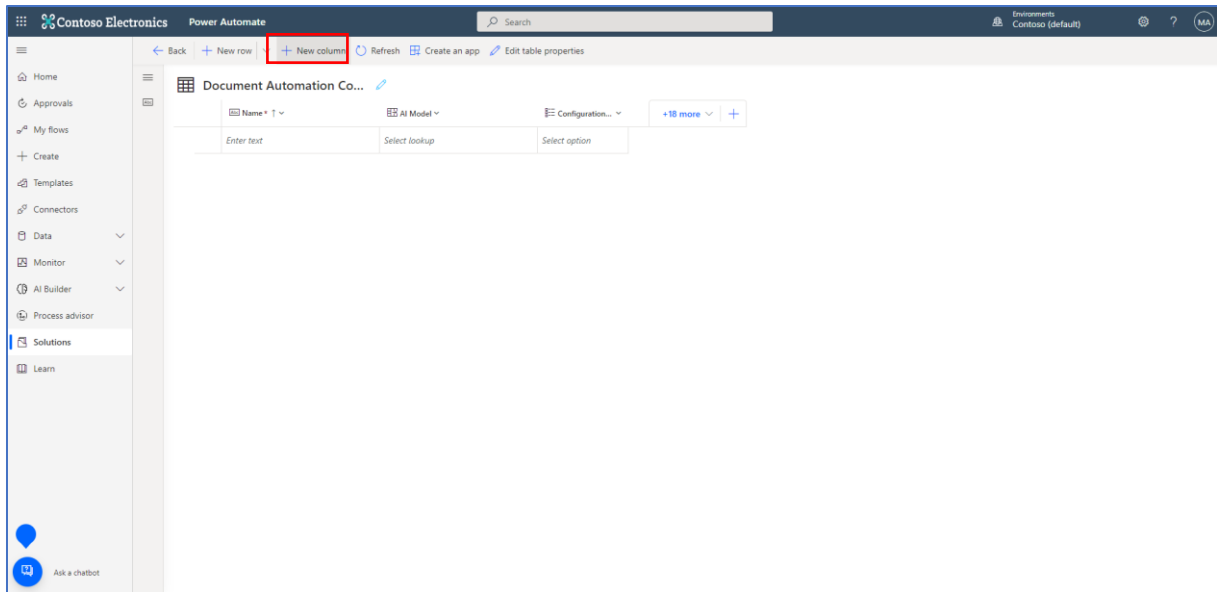
Select the “Document Automation Configuration” table and select “Next” and “Add”



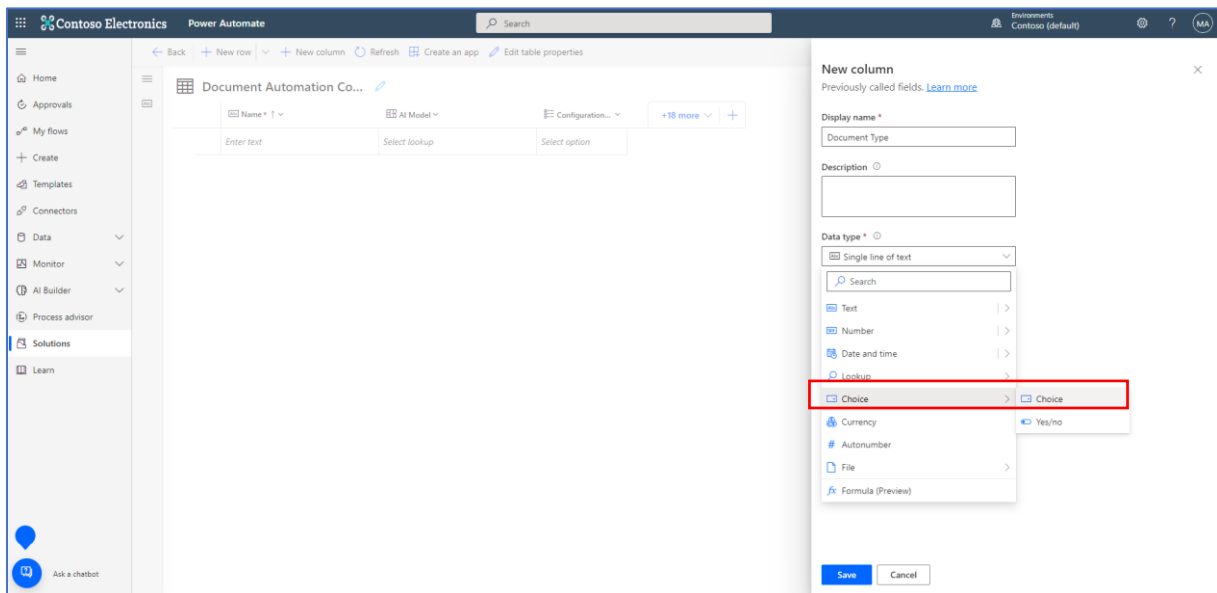
Select the ‘Document Automation Configuration’ table and select “Edit”



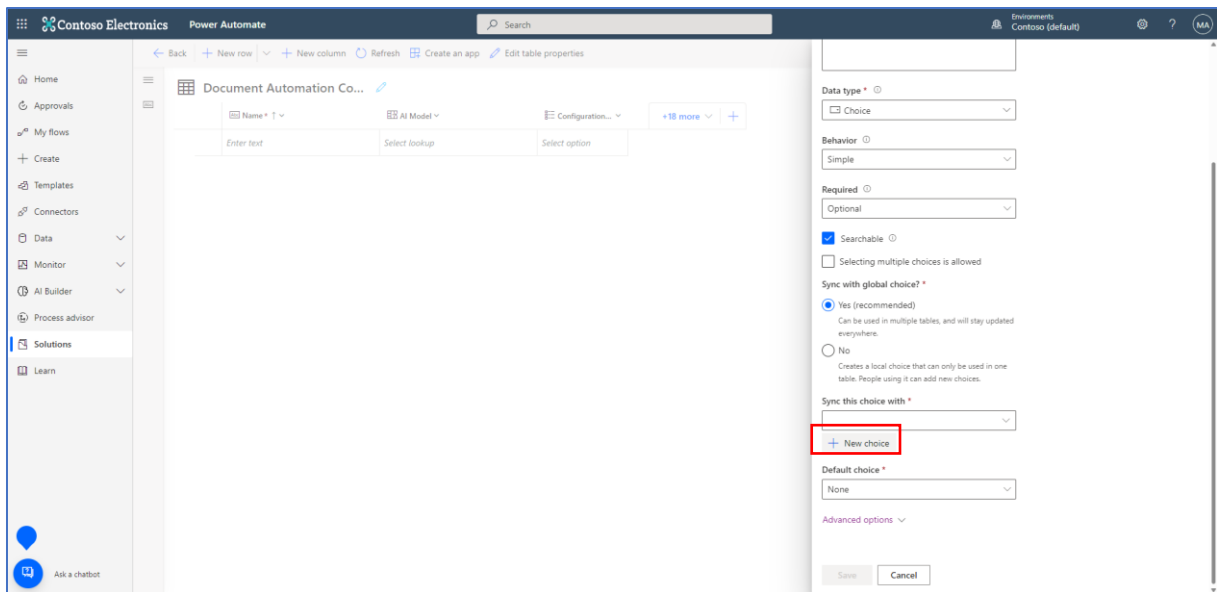
Select “+New column”



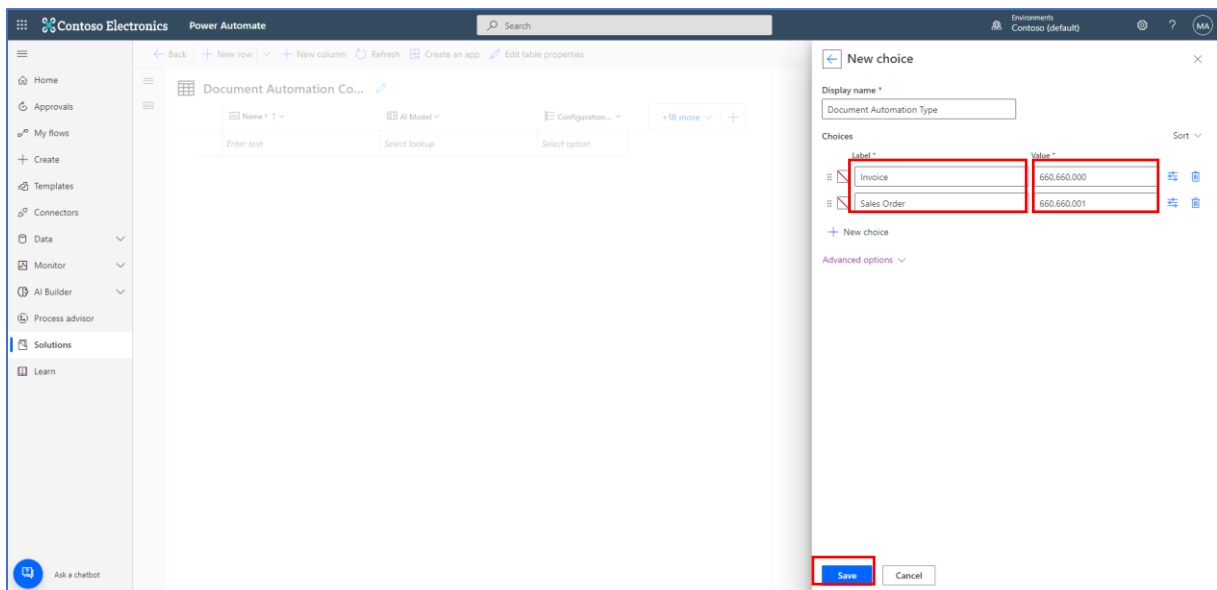
Enter “Document Type” for the “Display name” and select “Choice\Choice” for the “Data type”



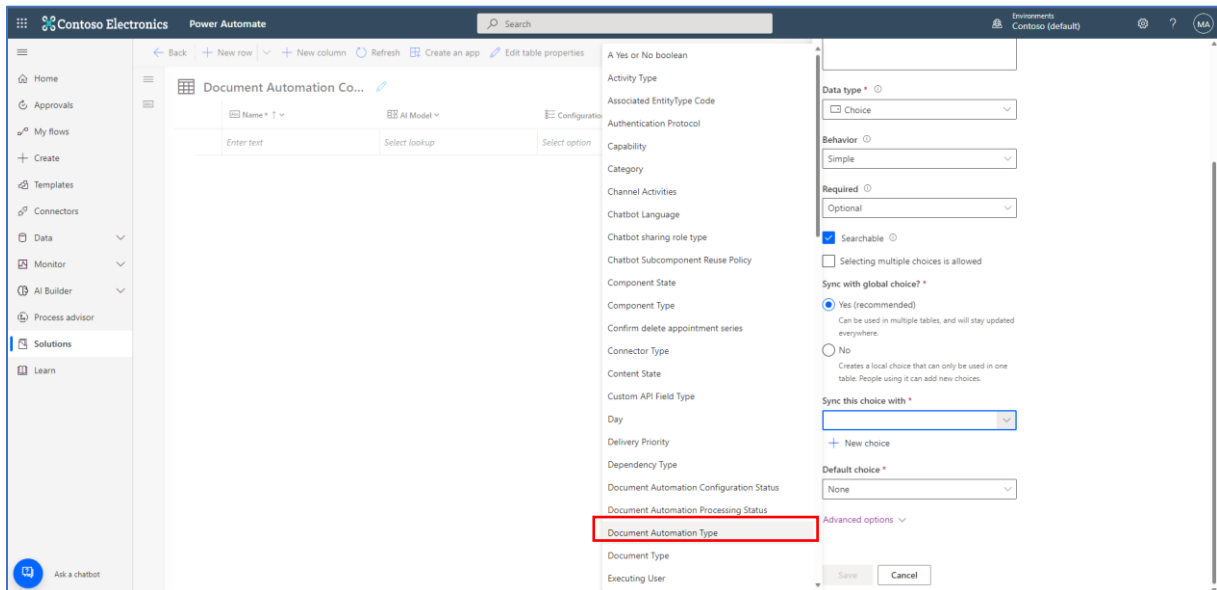
Then select “New choice”



Enter “Document Automation Type” as “Display Name” and as many choices as document types you want to support. Keep track of the “Value” for later use. Select “Save”

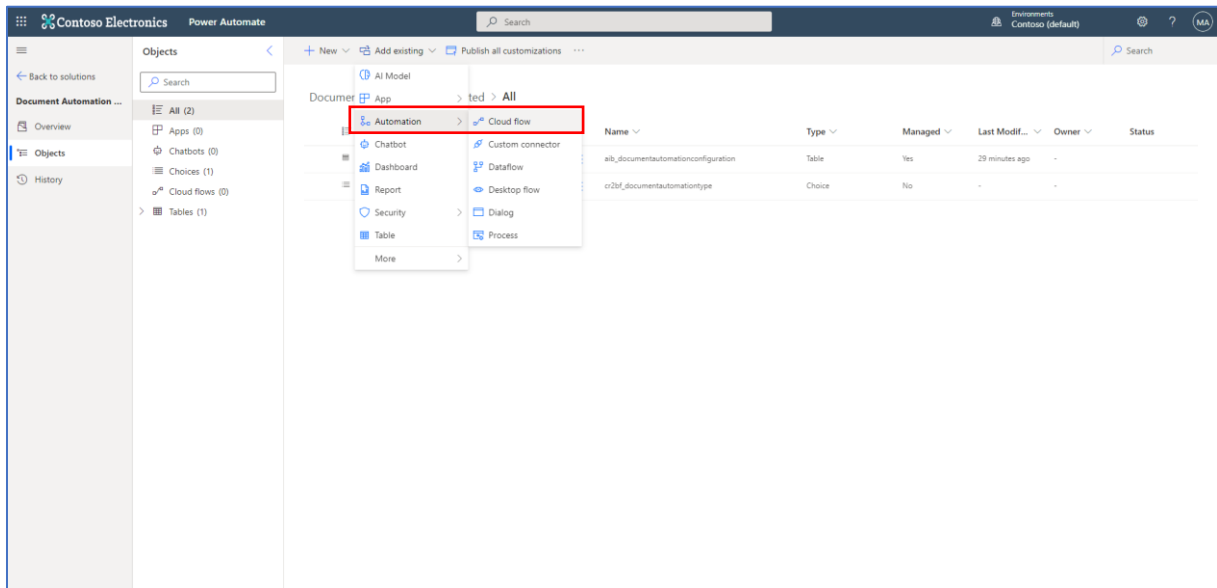


Select “Sync the choice with” and select the “Document Automation Type”, then select “Save”, then select “Back”

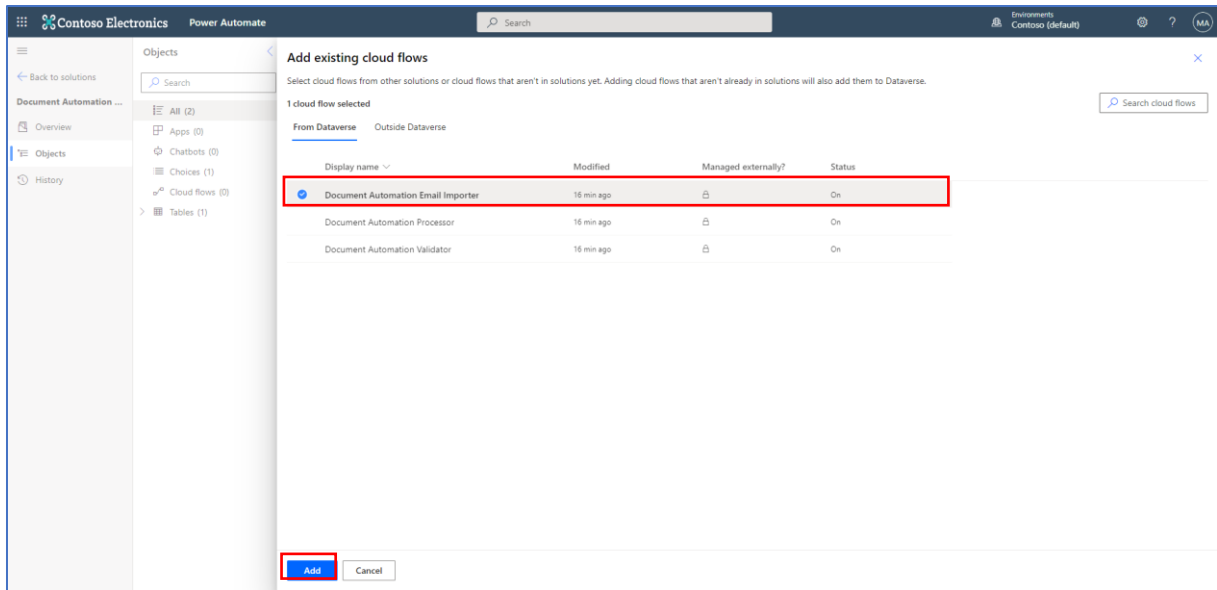


We are going to update the flow watching for new documents to route it to the proper model

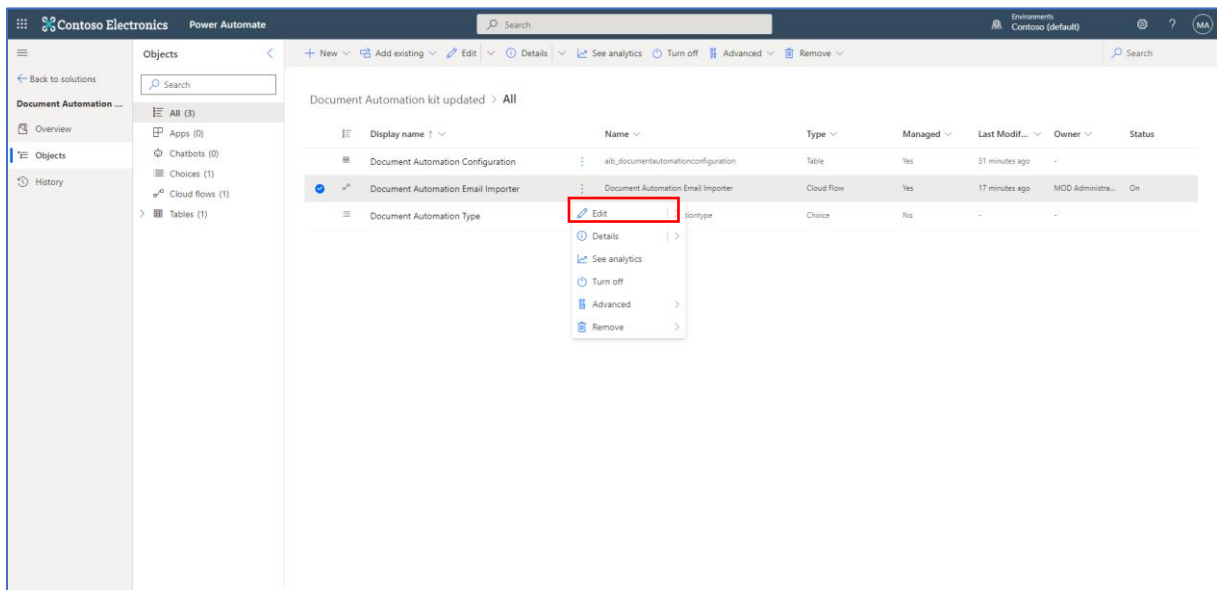
Select “Add existing”, then “Automation” and “Cloud flow”



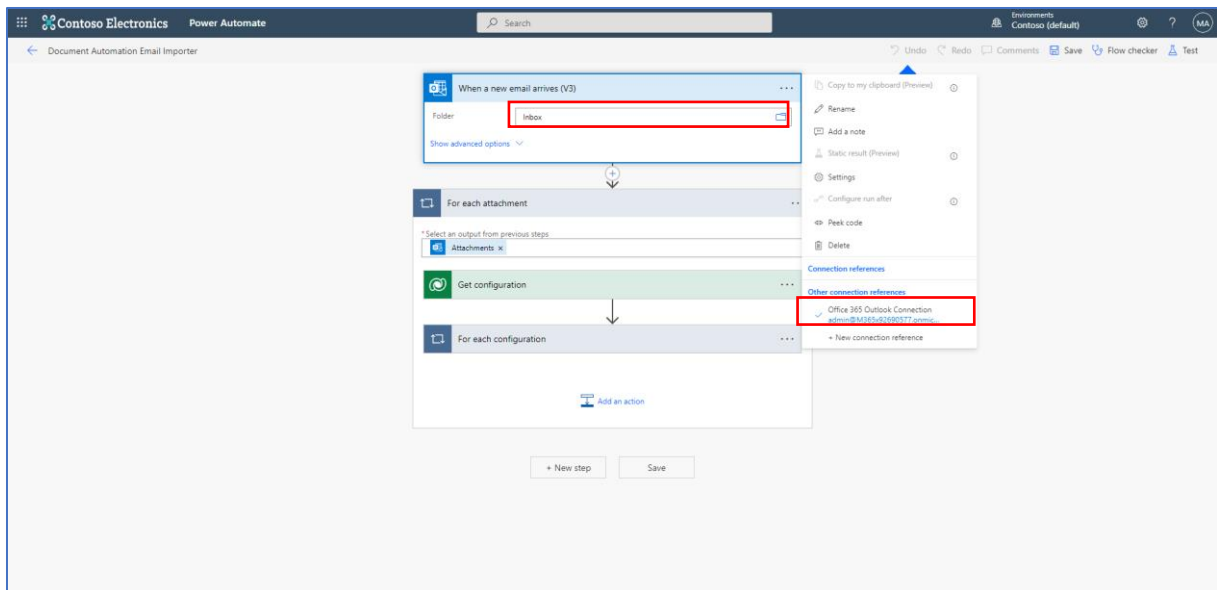
Select the “Document Automation Email Importer” flow and select “Add”



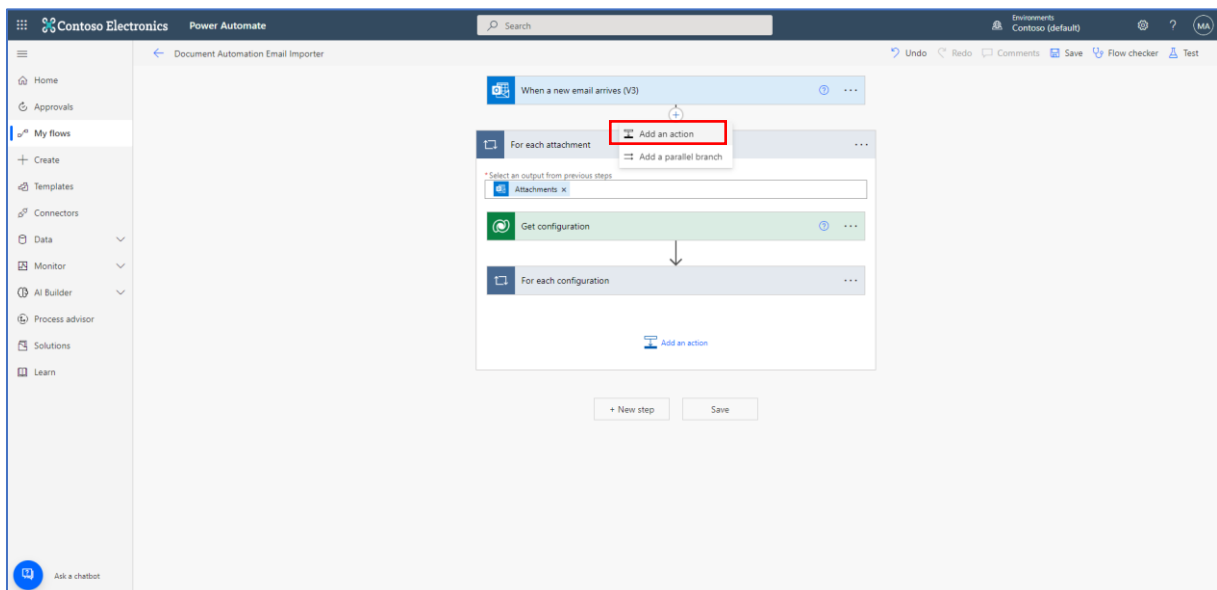
Select the “Document Automation Email Importer” flow, select the “...” and select “Edit”



You need to define some classification logic. This can be performed for instance by the name. If you are receiving the other documents from another mailbox, just duplicate the “Document Automation Email Importer flow” and update the connection or the folder

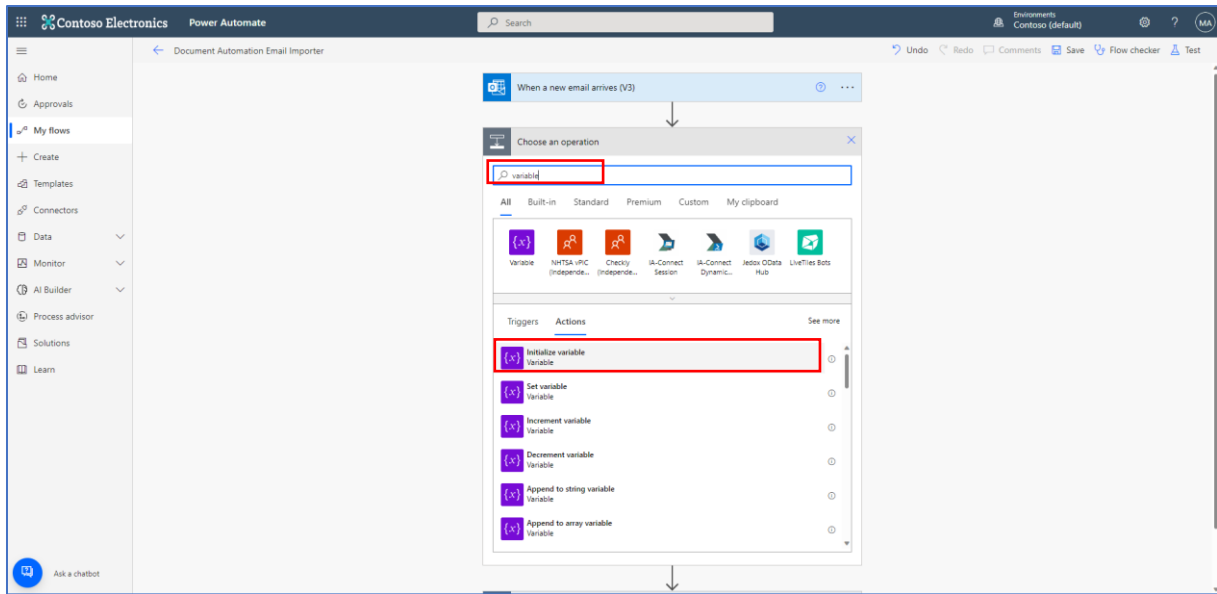


Select the “+” after the step “When a new email arrives (v3)” and select “Add an action”

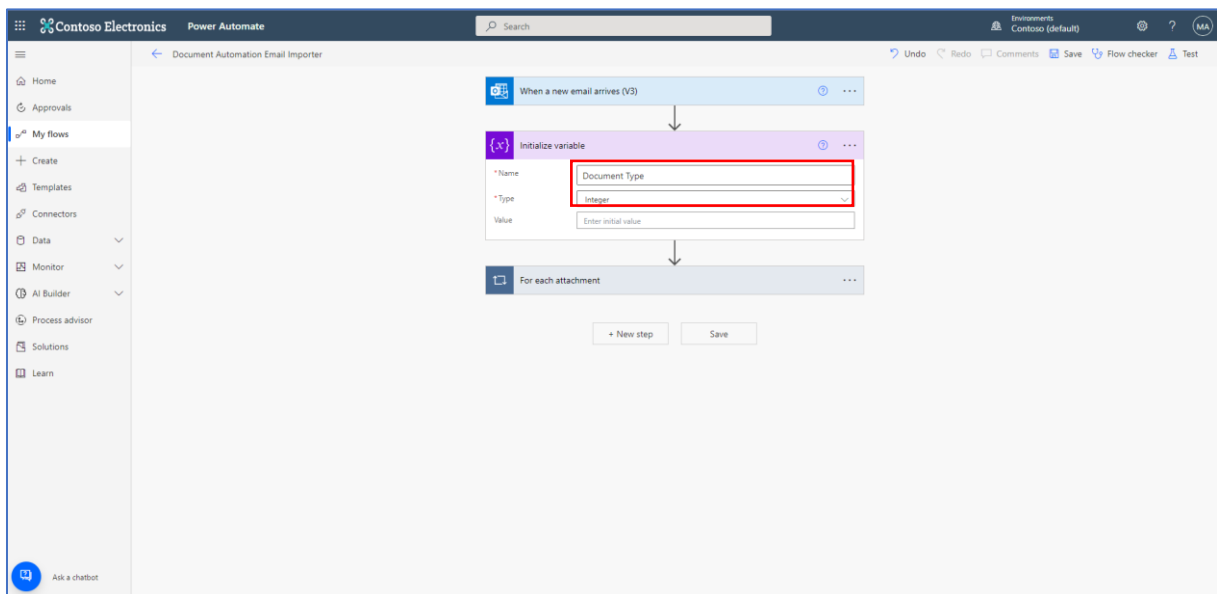




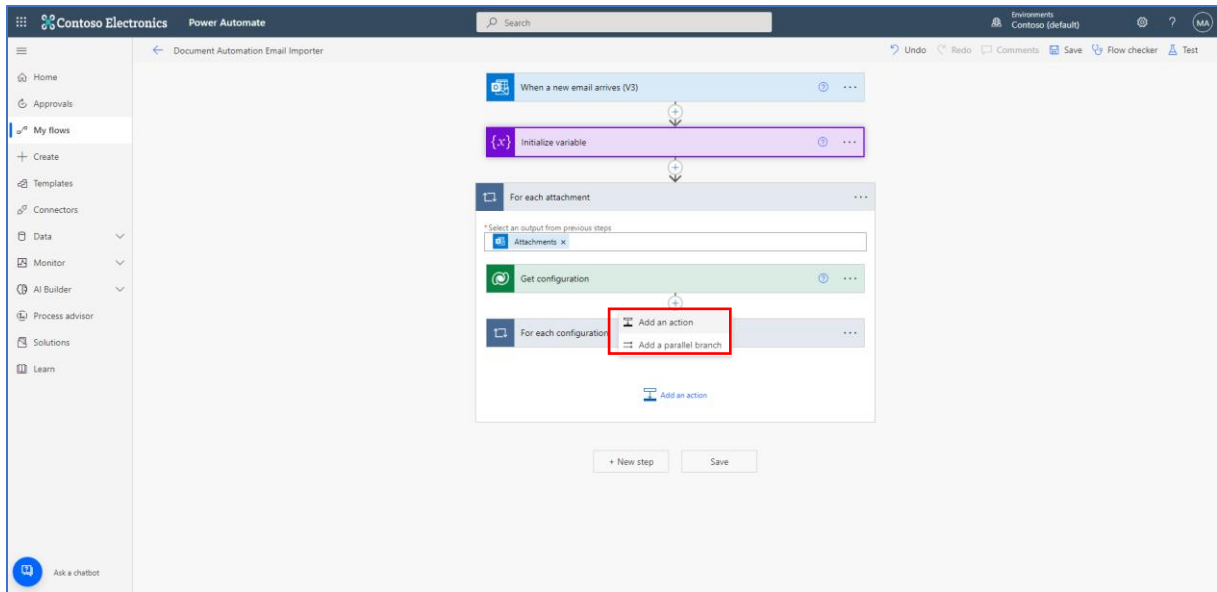
Type “variable” in the search box and select “Initialize variable”



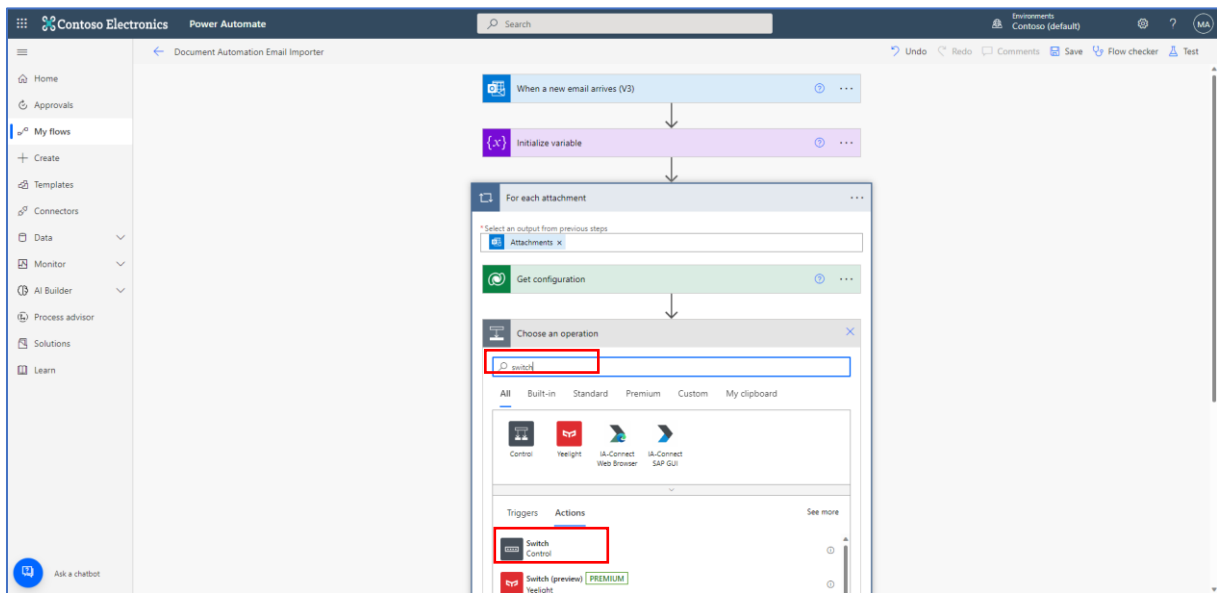
Type “Document Type” for the “Name” and “Integer” for the “Type”



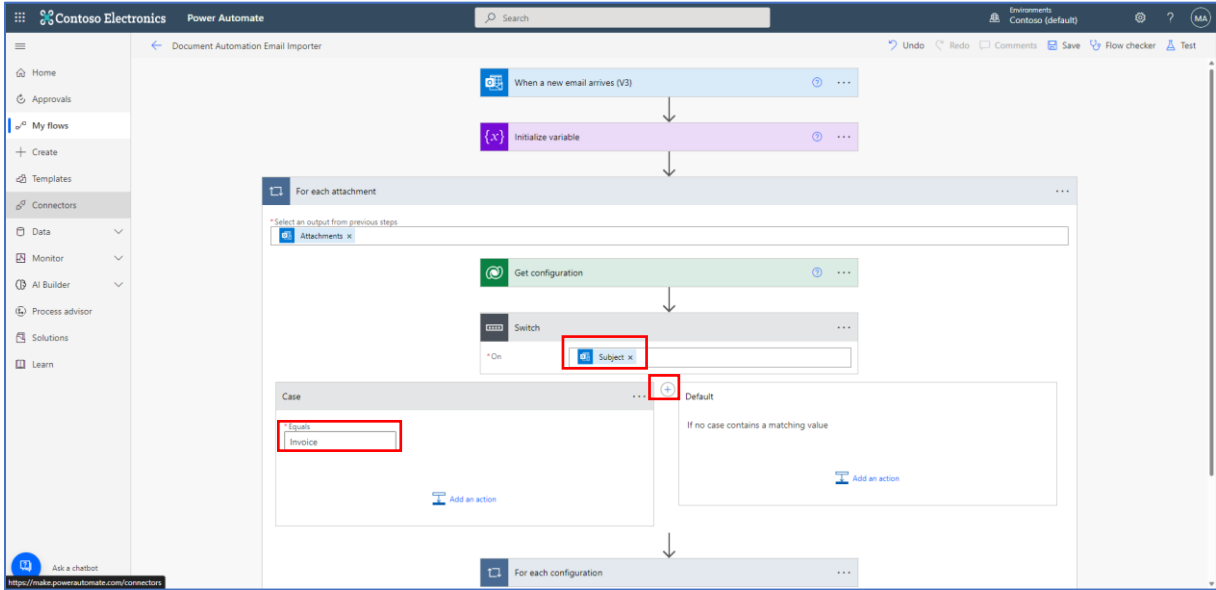
Select the “+” after the step “Get configuration” and select “Add an action”



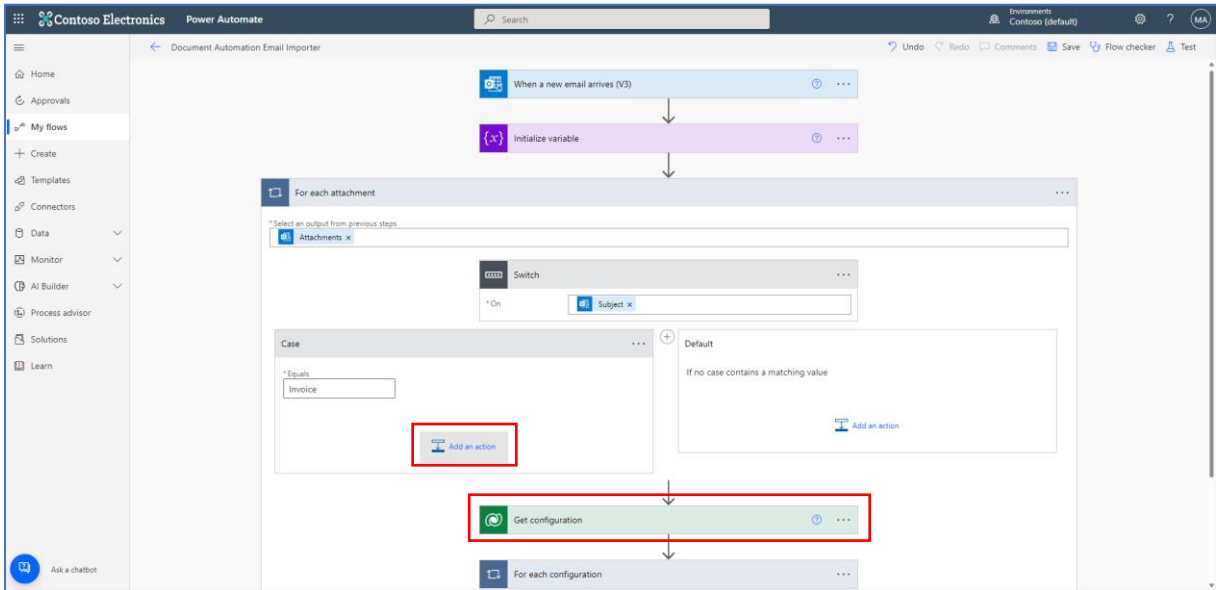
Type “Switch” in the search box and select the “Switch” action



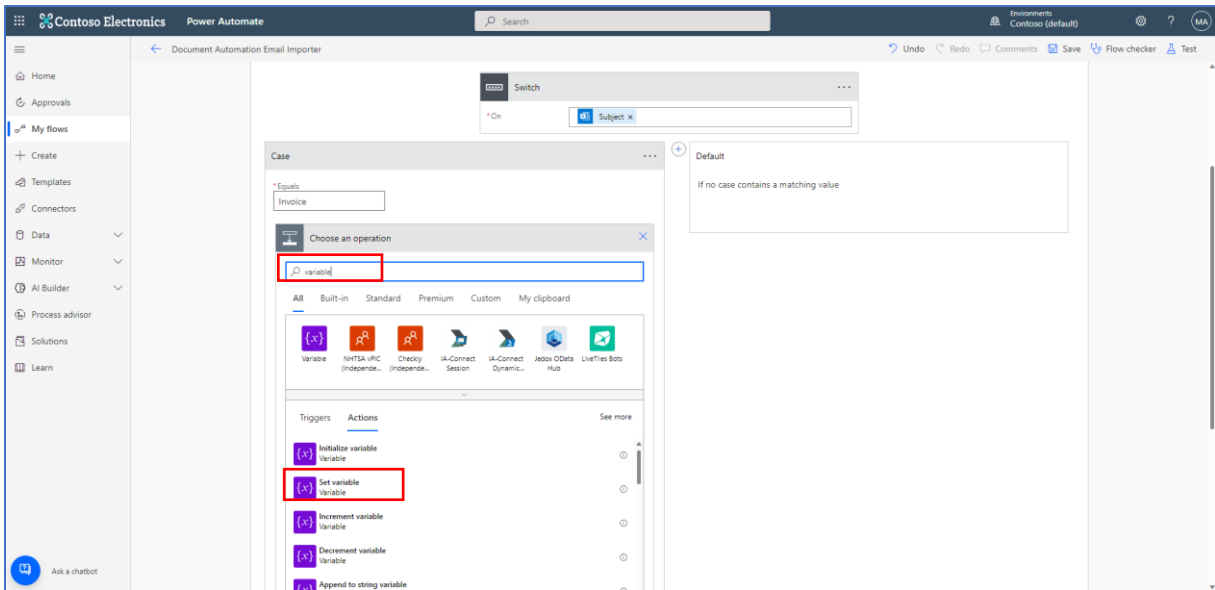
Enter the condition that will determine the type of document. For instance, choose the email subject and enter “Invoice” in Case. Add more cases for each document type.



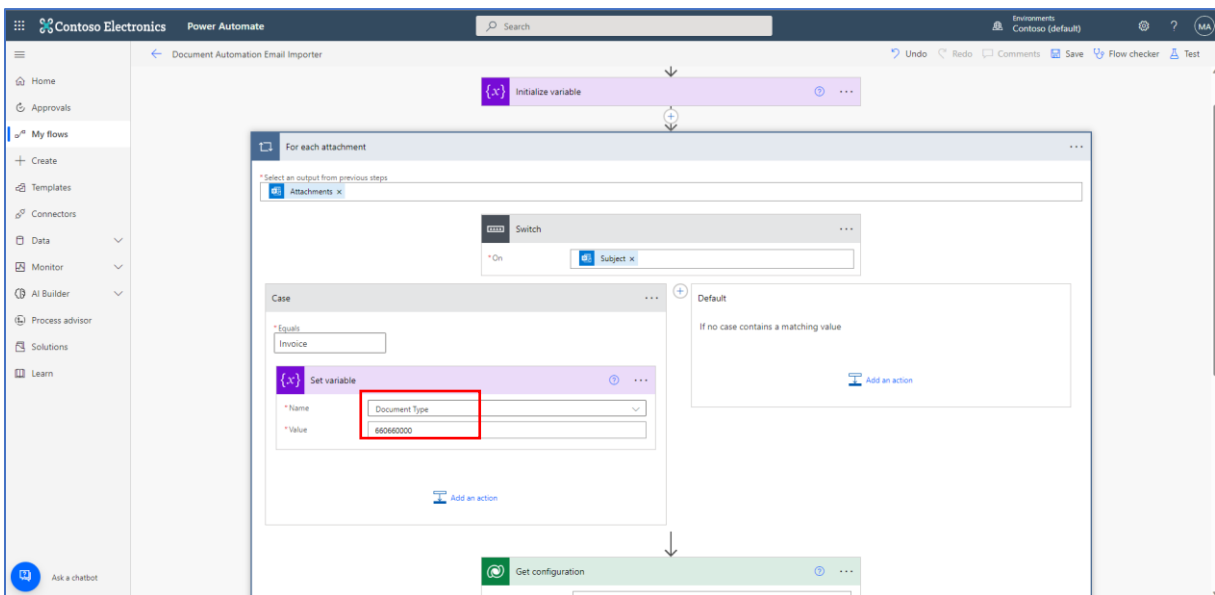
Drag and drop the “Get configuration” step after the switch and select “Add an action” in the first branch



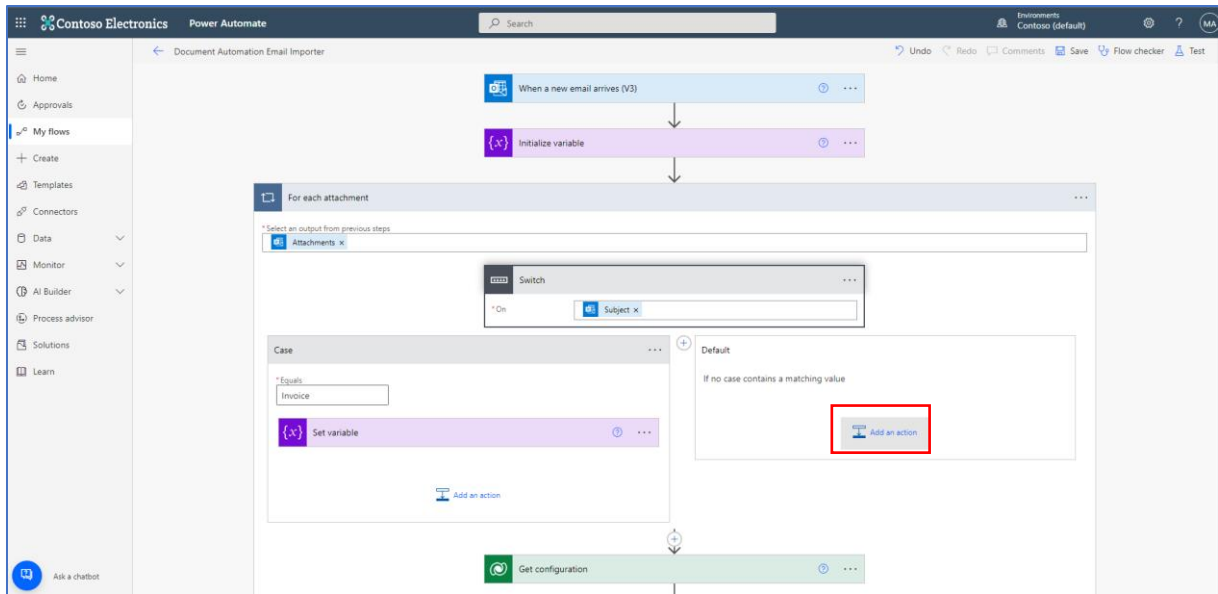
Type “variable” in the search box and select “Set variable”



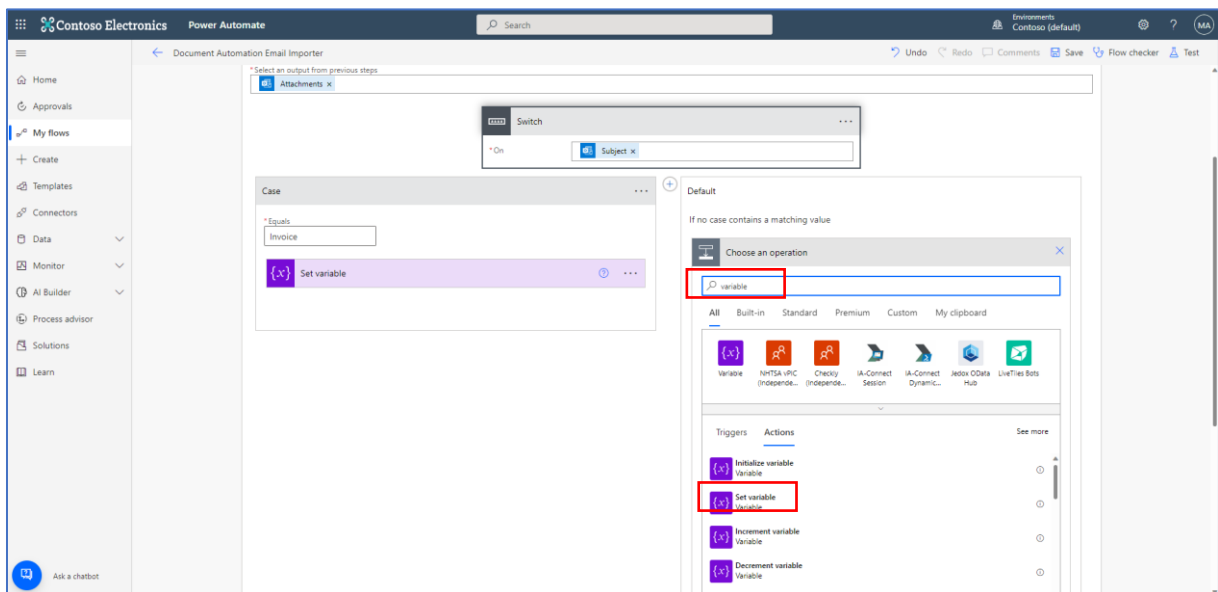
Select “Document Type” for the name and type YOURCHOICEVALUE for the Value. This is the value we asked you to get track of when creating the choice earlier removing comma characters.



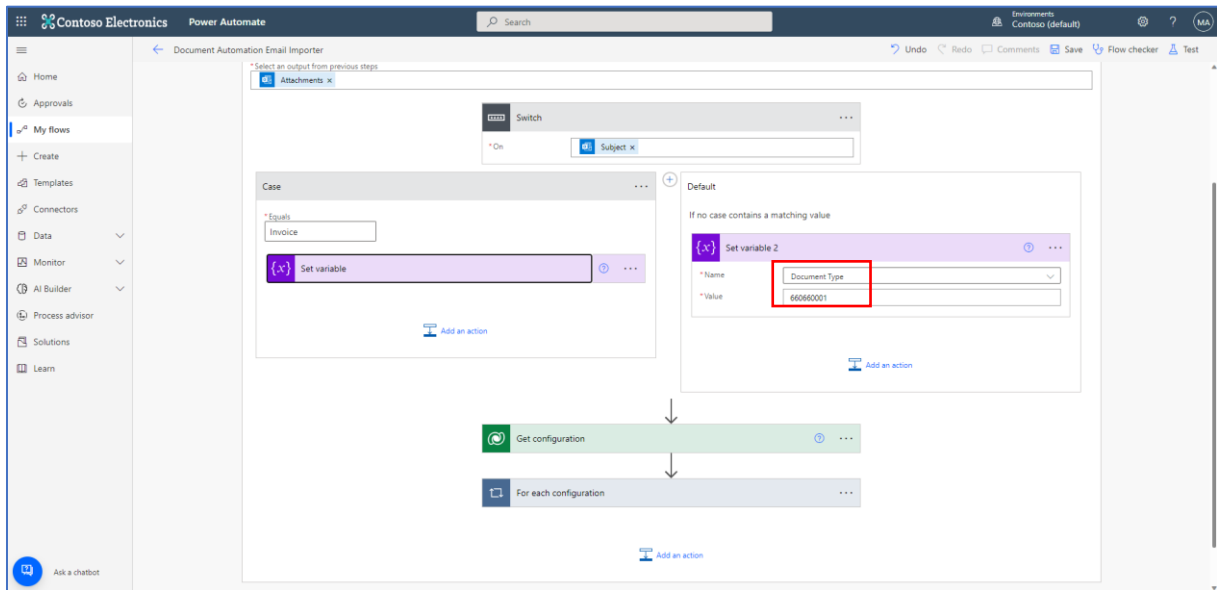
In the default branch, select “Add an action”,



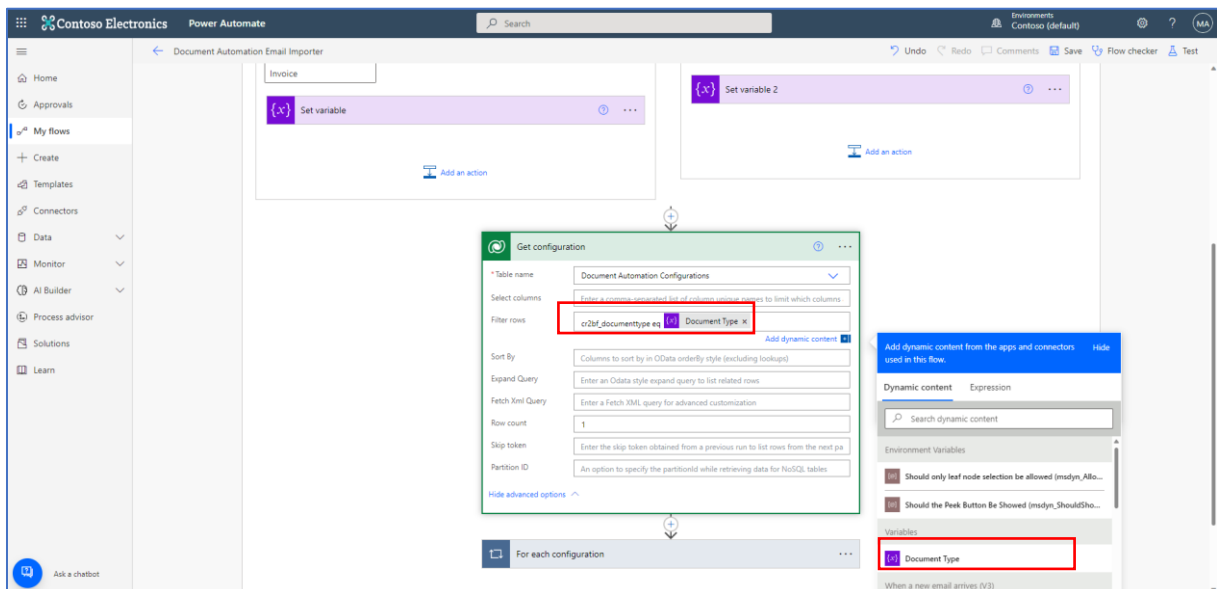
Type “variable” in the search box and select “Set variable”



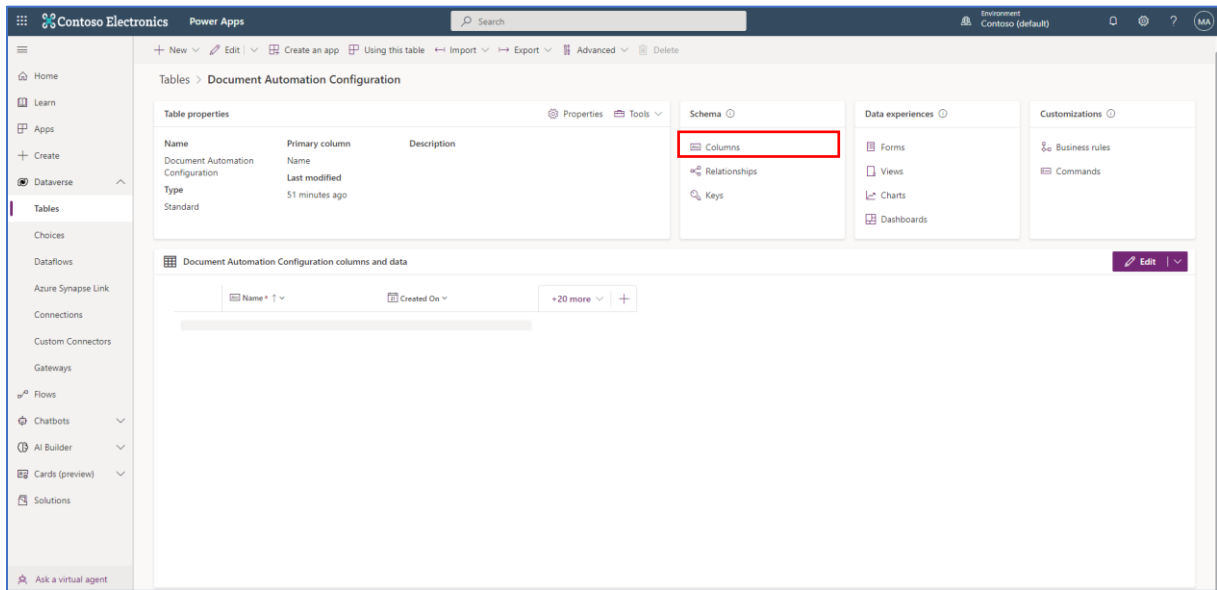
Select "Document Type" for the name and type YOURCHOICEVALUE. This is the model that will be used by default



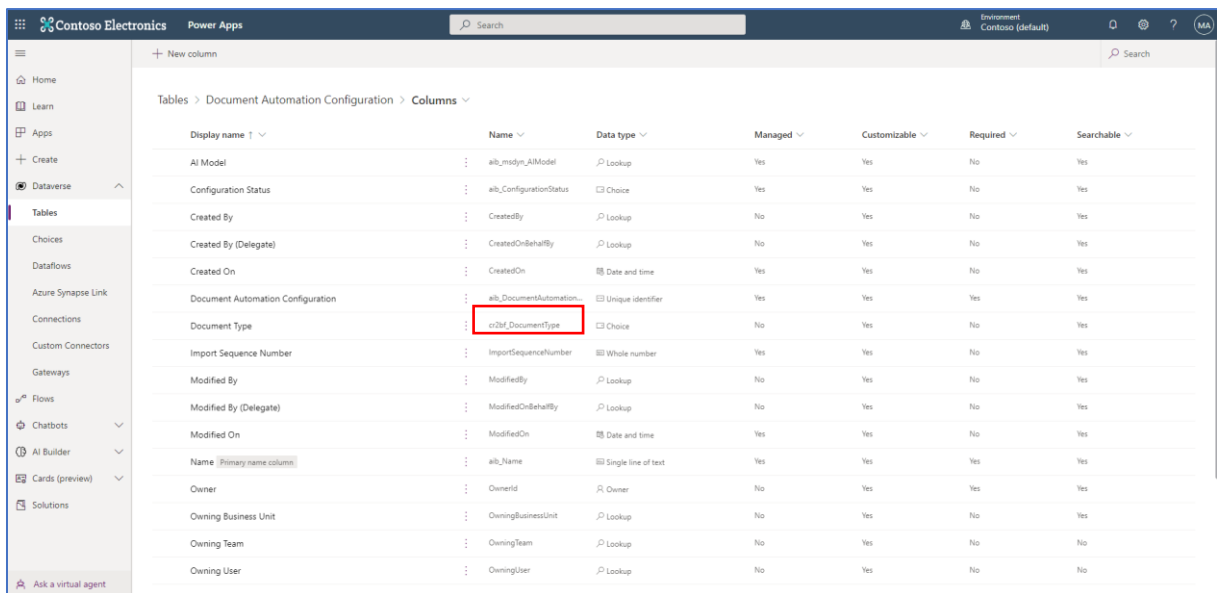
Expand the "Get configuration" action and type the "Filter rows" box `YOURENVCODE_documenttype eq` then pick the "Document Type" variable



YOURENVCODE can be found opening the “Document Automation Configuration” table from “Dataverse\Tables”, selecting the tab “All” and once open selecting “Columns”



Then look at the “Name”



YOUCHOICEVALUE is the value we asked you to get track of when creating the choice earlier removing comma characters.

You can now save your flow and select the ←.

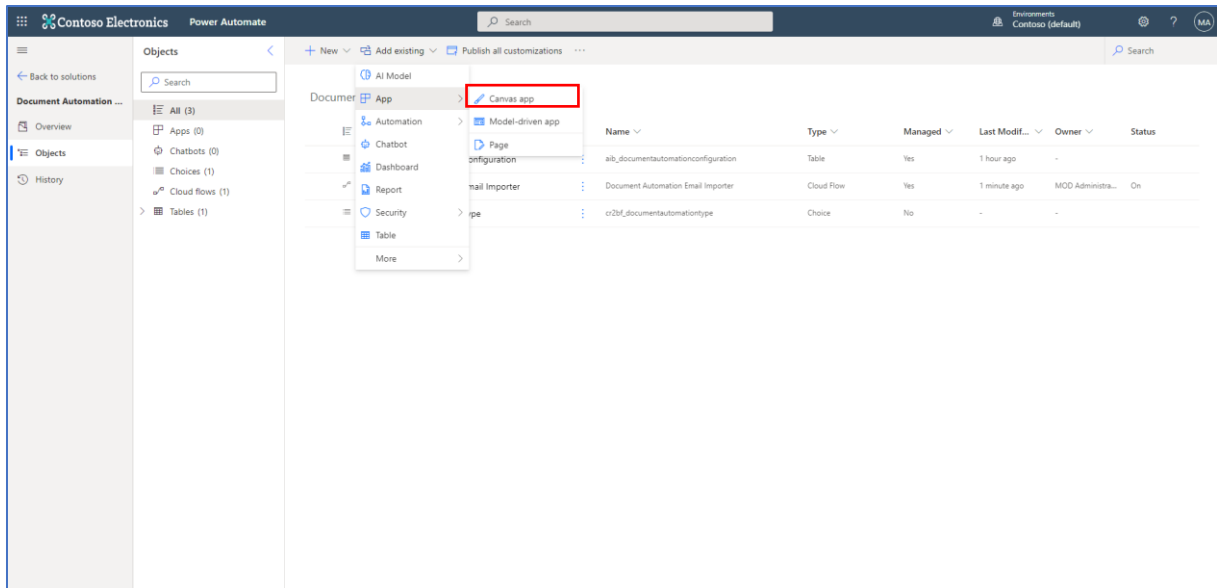
The screenshot displays the Microsoft Power Automate interface for a flow named "Document Automation Email Importer". The flow is currently in edit mode. The top navigation bar includes the "Save" button, which is highlighted with a red box. The flow logic is as follows:

- When a new email arrives (V3)**: The starting trigger.
- For each attachment**: A loop action that iterates over the attachments of the email.
- Switch**: An action that branches the flow based on the "Subject" of the attachment.
- Case**: The first branch, which contains a **Get configuration** action. The configuration table is "Document Automation Configurations" and the filter is "cr2of\_DocumentType eq 660660001".
- Default**: The second branch, which contains a **Get Configuration 2** action. This action also uses the "Document Automation Configurations" table and the same filter.

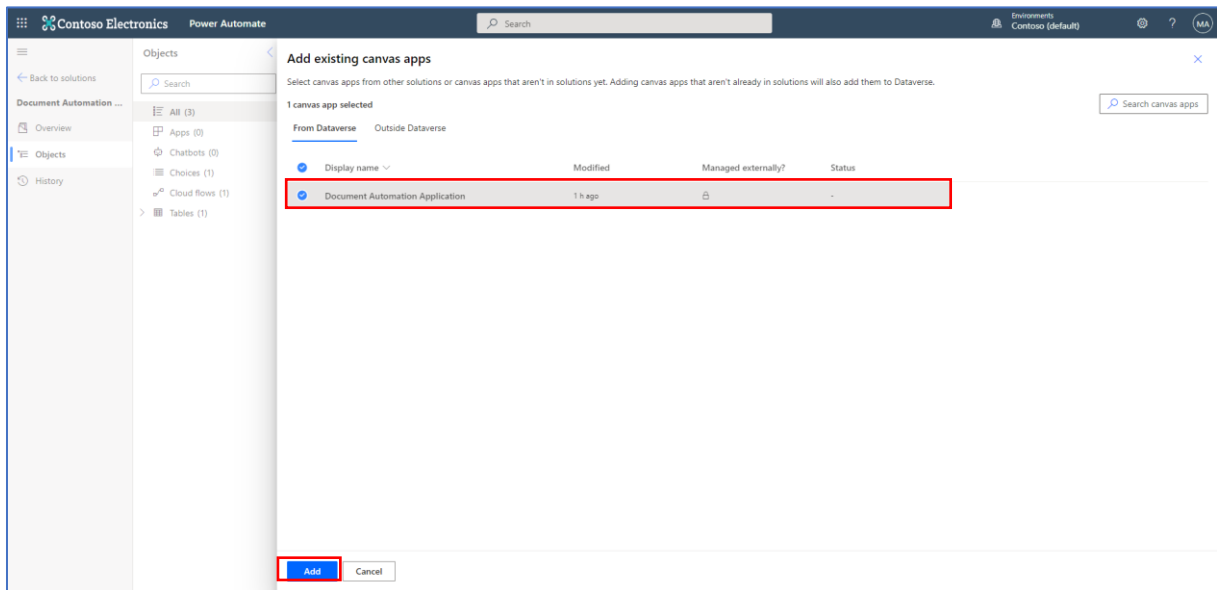


We are now going to update the application to support multiple document types

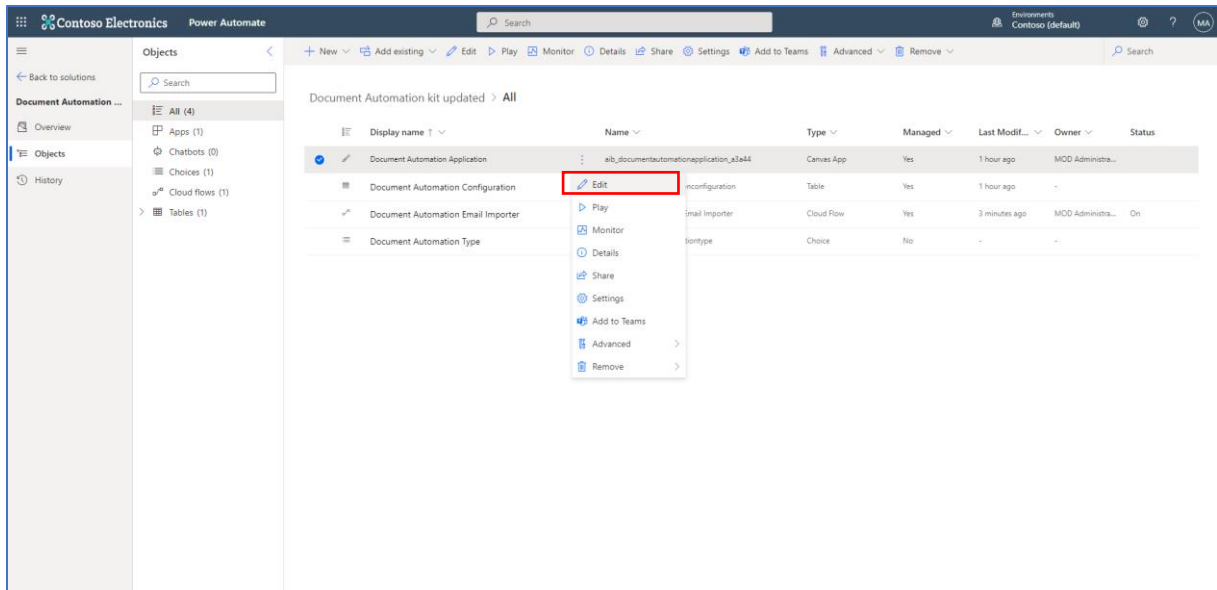
Select “Add existing”, then “App” and “Canvas app”



Select the “Document Automation Application” and select “Add”

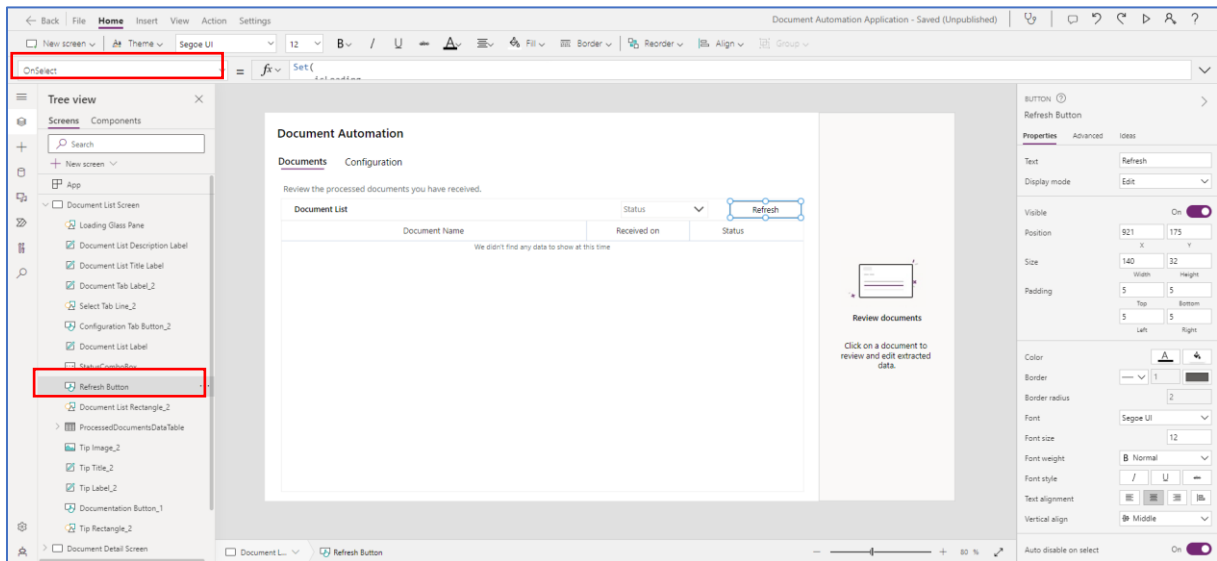


Select the “Document Automation Application”, select the “...” and select “Edit”



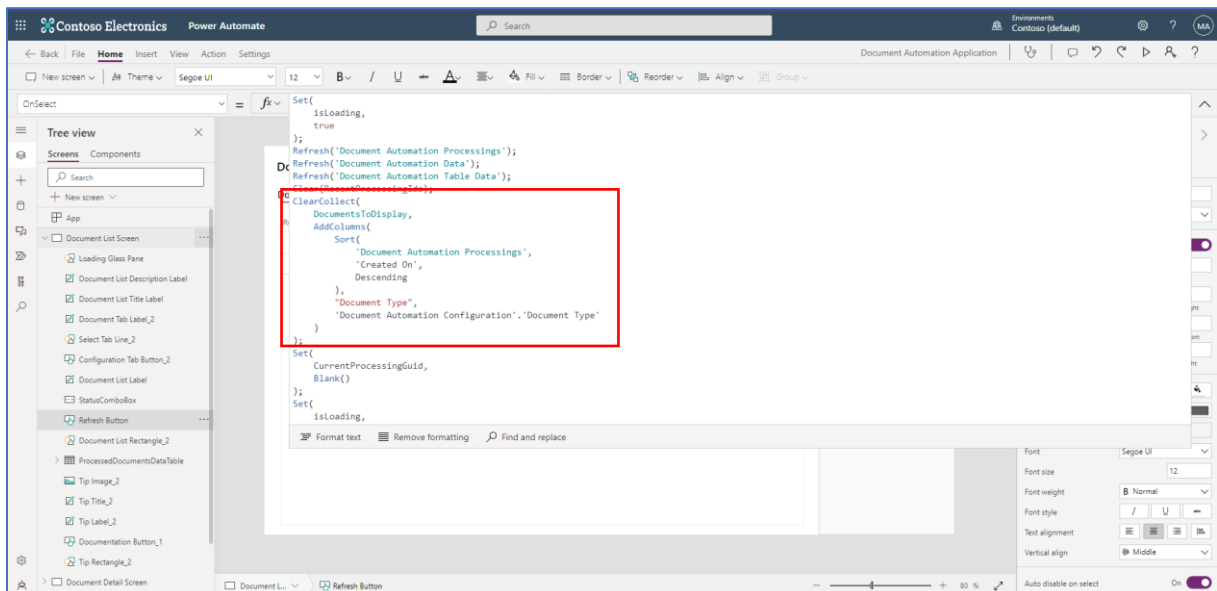
We are going to display the document type in the Documents list view

Select the “Refresh Button” on the tree view and the property “OnSelect”



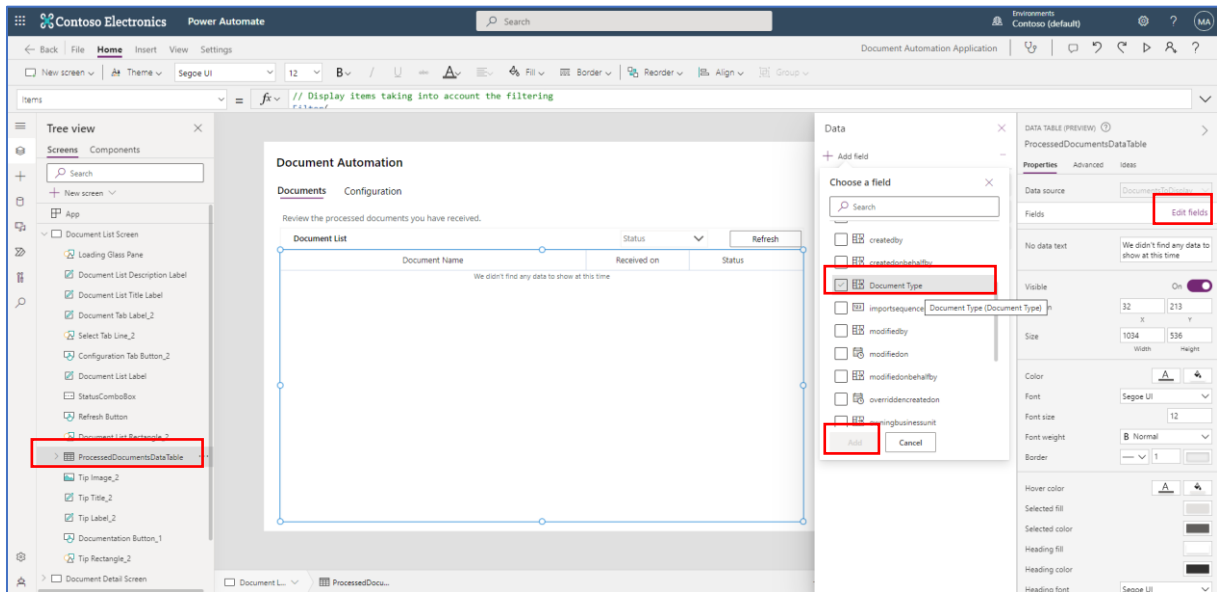
Replace the code by this

```
ClearCollect(  
    DocumentsToDisplay,  
    AddColumns(  
        Sort(  
            'Document Automation Processings',  
            'Created On',  
            SortOrder.Descending  
        ),  
        "Document Type",  
        'Document Automation Configuration'. 'Document Type'  
    )  
);
```

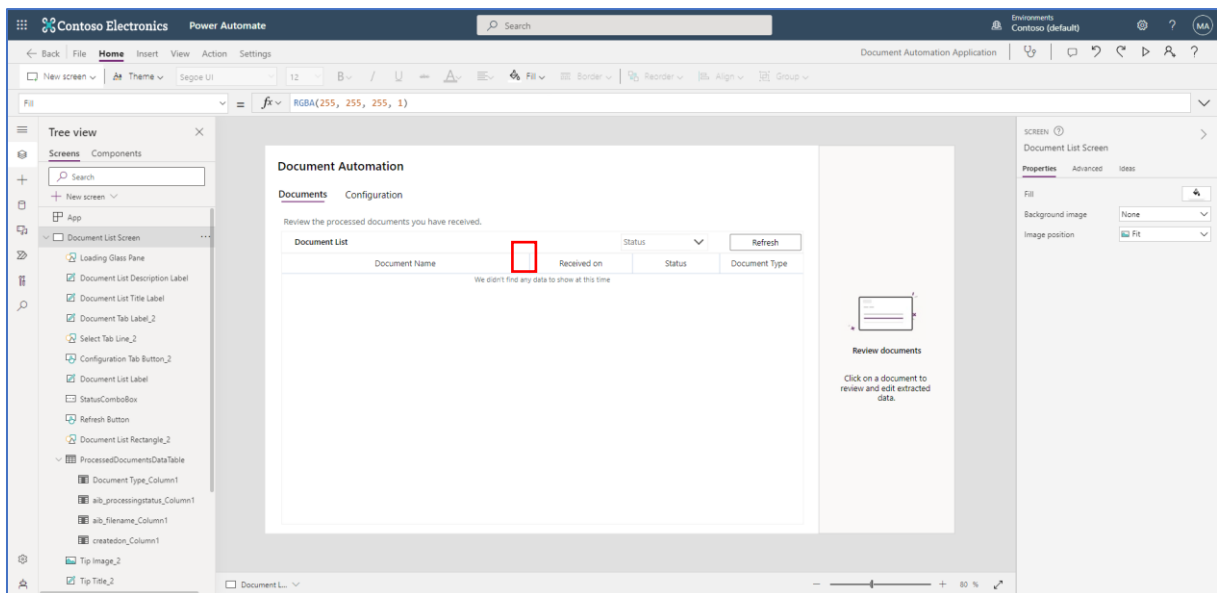


**Save and close the application. Then edit the application. This will force the Power Apps cache to refresh.**

Select the "ProcessedDocumentsDataTable" on the tree view, select "Edit fields" in the right pane, select "Add field" in the pop up, select "Document Type" and select "Add"

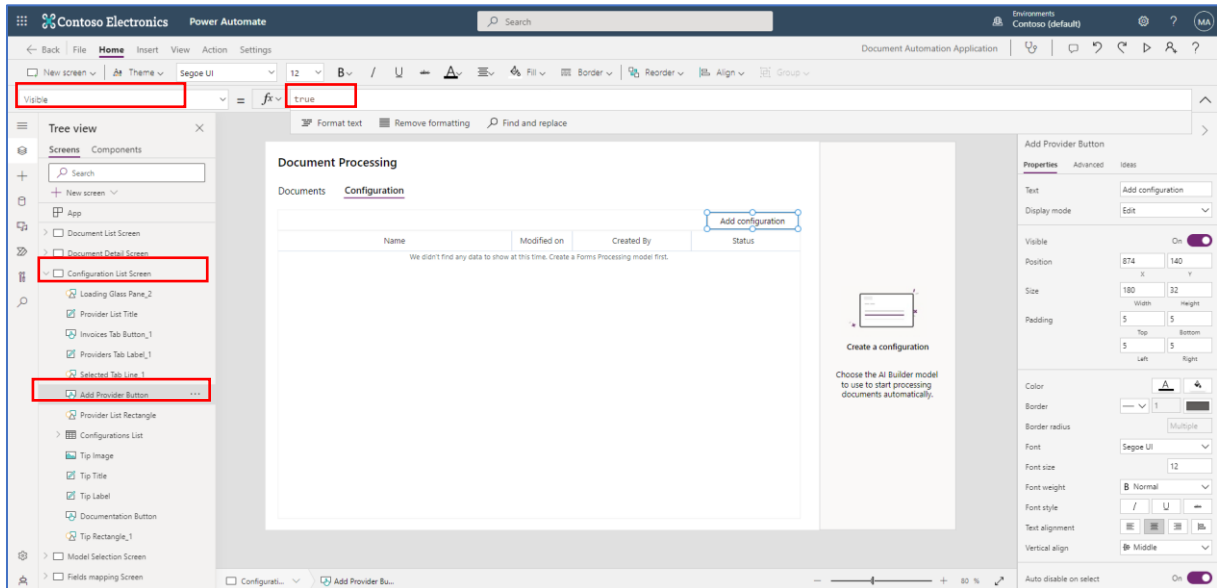


You will probably have to resize the columns of the table so it looks nice.



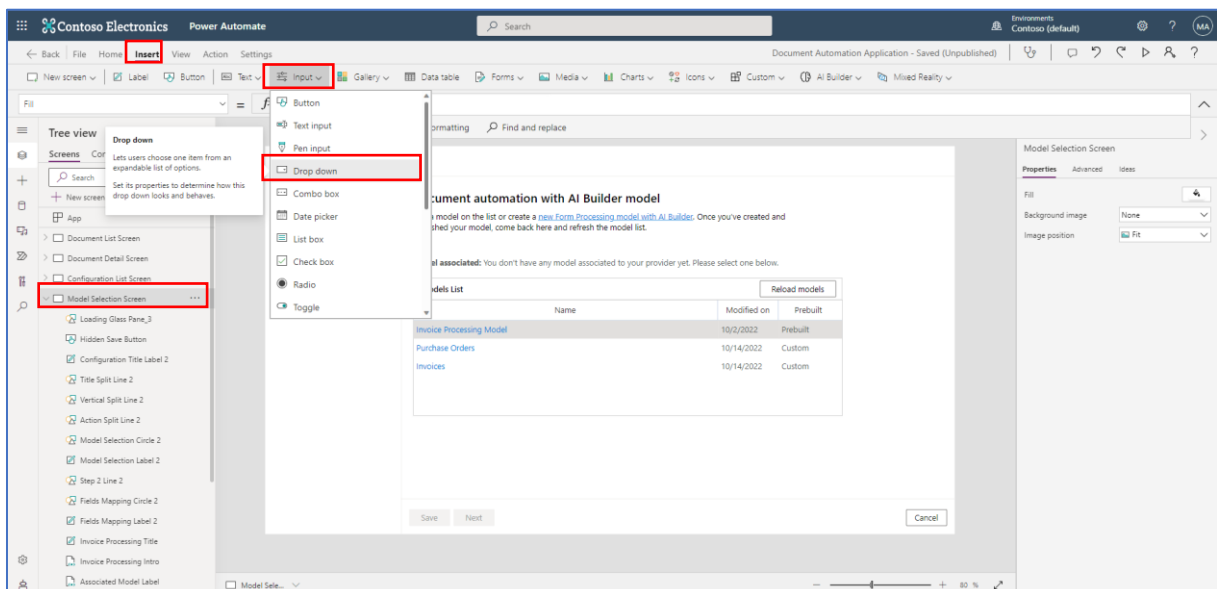
We are going to enable creating several configurations to support the various document types.

Select the “Configuration List Screen” in the tree view and the “Add provider button”. Then select the property Visible and change the code to `true`

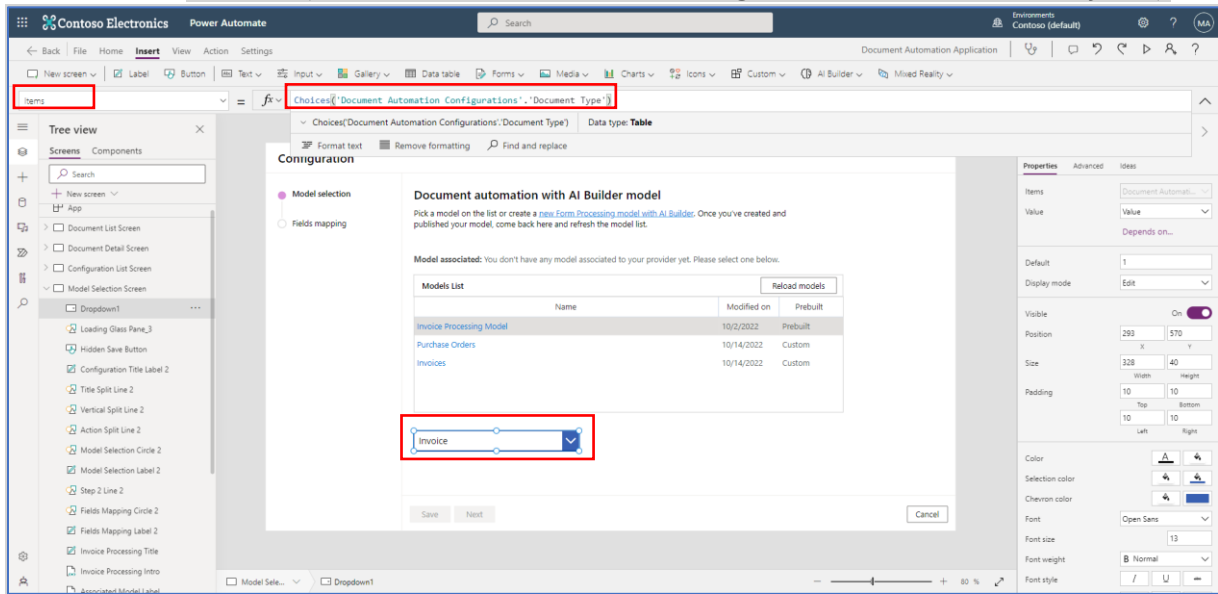


We are going to allow associating a model with a document type

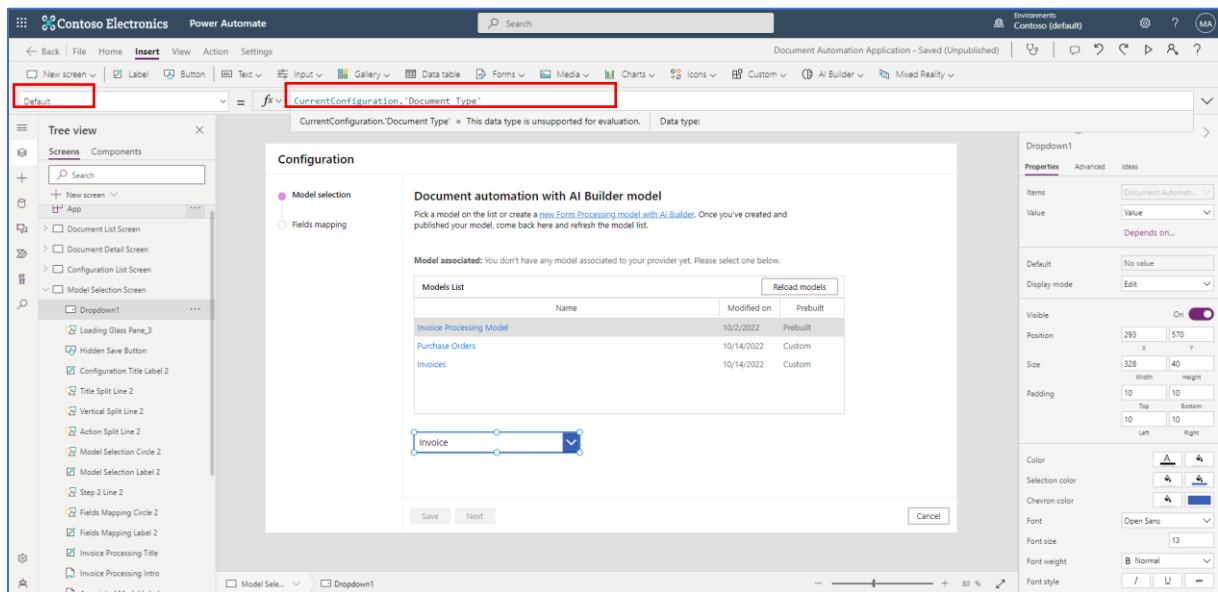
Select “Model Selection Screen” from the tree view, select “Insert”, select “Input”, then “Drop down”



Move the drop down component where you want, select the “Items” property and enter the following code `Choices('Document Automation Configurations'. 'Document Type')`



Select the “Default” property and enter the following code `CurrentConfiguration. 'Document Type'`



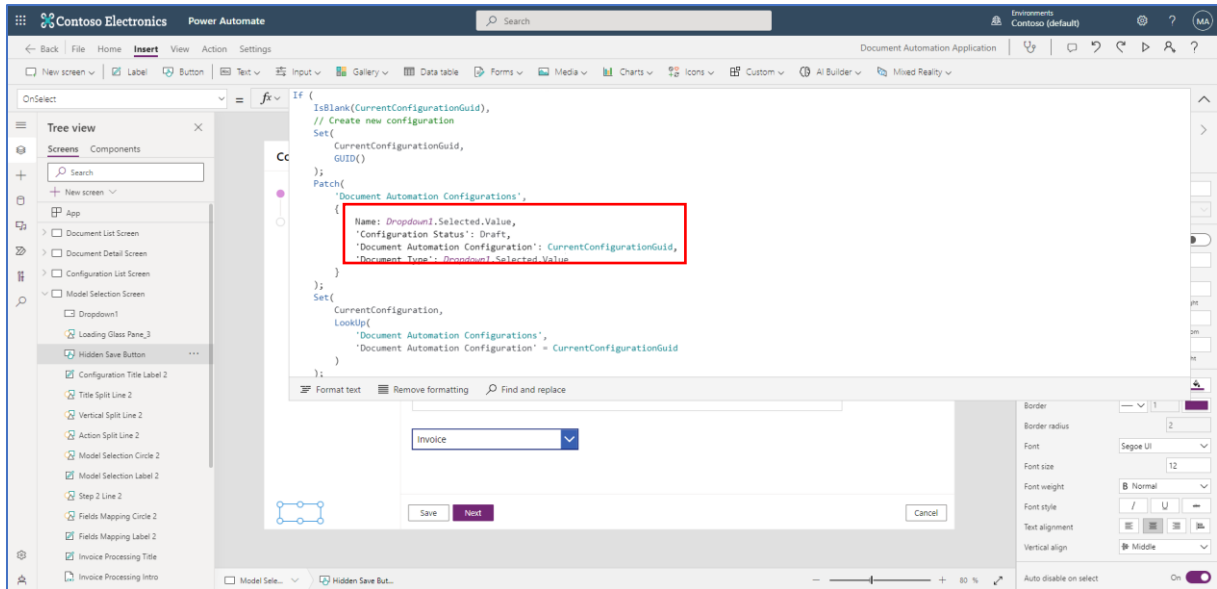
Select the “Hidden Save Button” on the tree view, select the “OnSelect” property and change the code to this

Name: Dropdown1.Selected.Value,

'Configuration Status': 'Document Automation Configuration Status'.Draft,

'Document Automation Configuration': CurrentConfigurationGuid,

'Document Type': Dropdown1.Selected.Value



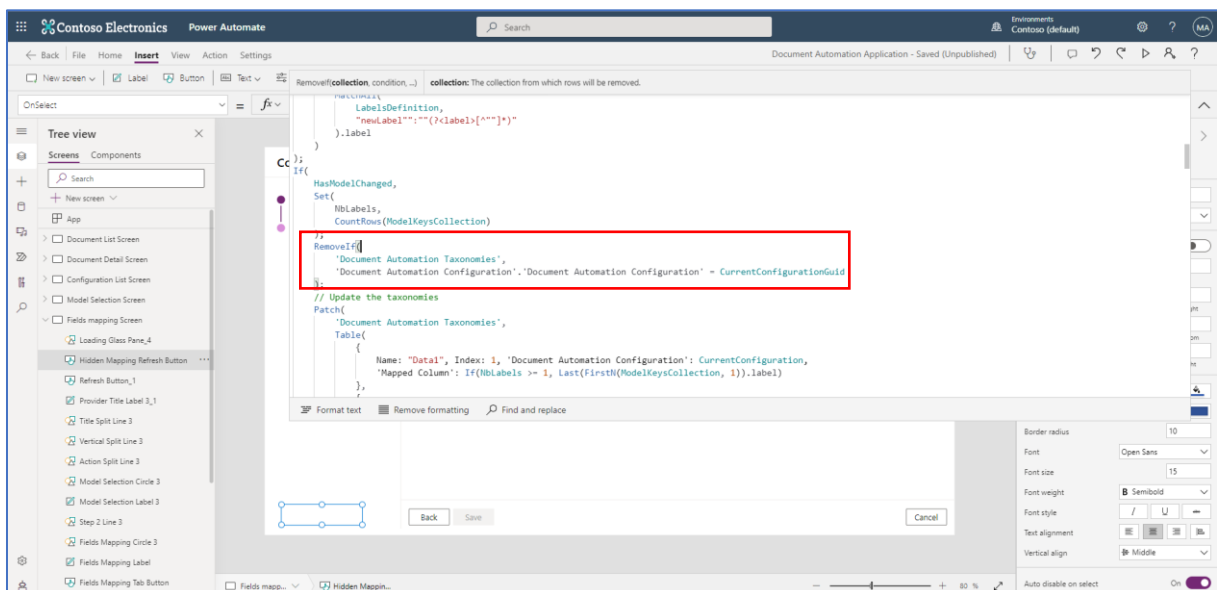
Select the “Fields mapping Screen” in the tree view and select the “Hidden Mapping Refresh Button”. Then replace with the following code

RemoveIf(

'Document Automation Taxonomies',

'Document Automation Configuration'. 'Document Automation Configuration' = CurrentConfigurationGuid

);



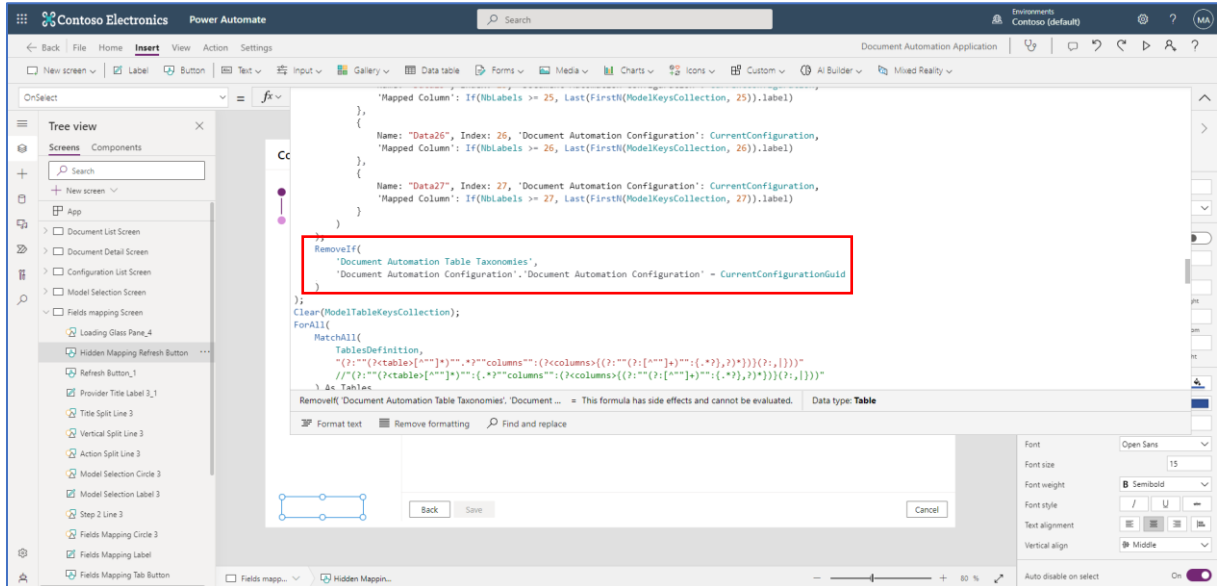
Low in the same code replace with the following code

```
RemoveIf(
```

```
'Document Automation Table Taxonomies',
```

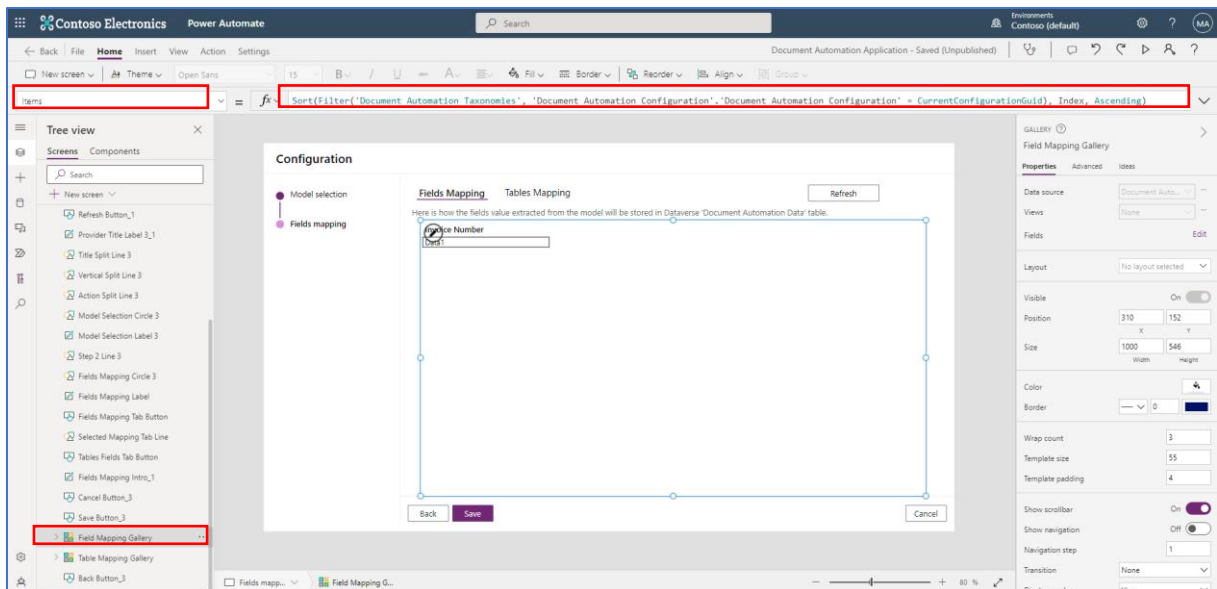
```
'Document Automation Configuration'. 'Document Automation Configuration' = CurrentConfigurationGuid
```

```
)
```



Select the "Field Mapping Gallery" from the tree view, the "Items" property and replace the code with this

```
Sort(Filter('Document Automation Taxonomies', 'Document Automation Configuration'. 'Document Automation Configuration' = CurrentConfigurationGuid), Index, Ascending)
```





Save and publish your app.

Run the application

Create a new configuration, choose the model and the document type.

Repeat this for each document type.

**We are now ready for the test!**