ALLAN THRAEN | 🕐 5 years ago | 🗎 PDF | 🗨

CMS   Optimizely (Episerver)   Tips and Tricks   Integrations   Tech Talk

USING EPISERVER FORMS TO BOOK MEETINGS IN OUTLOOK WITH MICROSOFT POWER AUTOMATE

It's not as hard as you might think - and doesn't require any code - to connect your Episerver Forms with hundreds of other systems, using services like Microsoft Power Automate (formerly Flow), Azure Logic Apps, IFTTT or Zapier. I made a 5 minute video, showing how you can let your visitors request a meeting on a given date from a form on your website, and then having it being automatically booked in your Outlook 365 calendar.

Want to get more out of Optimizely CMS (Episerver) Forms?

We are experts in optimizing and extending Optimizely CMS forms. Reach out and let's talk.

REACH OUT

For a long time I have been intrigued by all the possibilities there exist to easily connect various cloud software with each other. A couple of years ago I shared a video on how you can use Zapier to connect Episerver forms with Google sheets (https://world.episerver.com/blogs/Allan-Thran/Dates/2017/11/connect-episerver-forms-with-google-sheets-through-zapier---no-code-required/) and now I made a little video, where I'm using Microsofts Power Automate to integrate an Episerver form with Outlook 365 calendar.

The trick is fairly simple - Episerver forms supports Webhooks out-of-the-box. That means, as an editor you can simply add a url to a list of webhooks on the Form container and whenever the form is submitted, Episerver will call that URL and send along the submitted data.
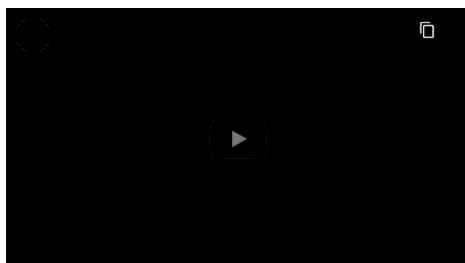
Now, on the other end of that we can go to either Microsoft Power Automate (Formerly known as Microsoft Flow) or create a 'Logic App' in the Azure portal and there setup a Trigger that starts a workflow whenever it's called on the url it generates (which you insert in your form as a webhook).

The flow can contain actions - and even logic, such as loops and conditional statements - and basically let's your use your mouse in a browser to define complex logic and integrations with many different systems.

A common use case is that you want to allow new potential customers schedule a call with a sales rep, so that's what I'm using here. It will essentially take all in the input from the form and use that to find an available meeting slot and then create it as an outlook calendar event and send out invitations.

I hope you enjoy the video.

Update 2020-05-26: The video isn't very clear about how I get the sample form submit json I use in the automation. The basic trick I use is to create a requestbin, insert that url into the Webhooks for the form and then do a form submission. Then you can revisit your requestbin and find the posted json that can be easily imported to form the schema in Power Automate.

CMS   Optimizely (Episerver)   Tips and Tricks   Integrations   Tech Talk