



# APPROVAL FLOWS

# VEM ÄR JAG?

- Pappa
  - Partner
  - Programmer
- 
- Podcast CRM Rocks since 2013
  - Power Platform Communit



# POWER AUTOMATE: APPROVAL FLOWS



Why

What

Templates

Under the cover

Tips



# SWEDEN IS HERE

Power Platform admin center

Manage

Environments

Data (preview)

Products

Power Pages

Dynamics 365 Apps

Open

Resources

Settings

Convert to production

Backup + Restore

Copy

Reset

Delete

History

Environments > Dynamics Swe

Details

Environment URL

we.crm22.dynamics.com

Region

Sweden

Type

Sandbox

Organization ID

35de5227-04d7-ef11-b8e4-6045bde9c544

Created by

Markus Erlandsson

State

Ready

Refresh cadence

Frequent

Security group

Not assigned

Environment ID

3951d3c3-90a7-e825-9493-a8cbc2ff86f0

Expand table

Region	Deployment schedule for 2025 wave 1 general availability
First release	March 24, 2025
Canada	March 31, 2025
South America	March 31, 2025
India	March 31, 2025
France	March 31, 2025
South Africa	March 31, 2025
Germany	March 31, 2025
Switzerland	March 31, 2025
Norway	March 31, 2025
Korea	March 31, 2025
Singapore	March 31, 2025
Sweden	March 31, 2025
United Arab Emirates	April 7, 2025
Japan	April 7, 2025
Asia Pacific	April 7, 2025
Great Britain	April 7, 2025
Australia	April 7, 2025
GCC High*	April 7, 2025
Europe	April 14, 2025
North America	April 21, 2025
GCC*	April 28, 2025
DoD*	April 28, 2025
China**	April 28, 2025





# WHY

WHY APPROVAL FLOWS



# PROBLEMS TO SOLVE



Expense Report Approvals



Leave Requests



Purchase Orders



IT Service Requests



Document Review and Approval

# WHY



Improved Efficiency



Enhanced Accountability



Consistency and Standardization



Real-Time Notifications





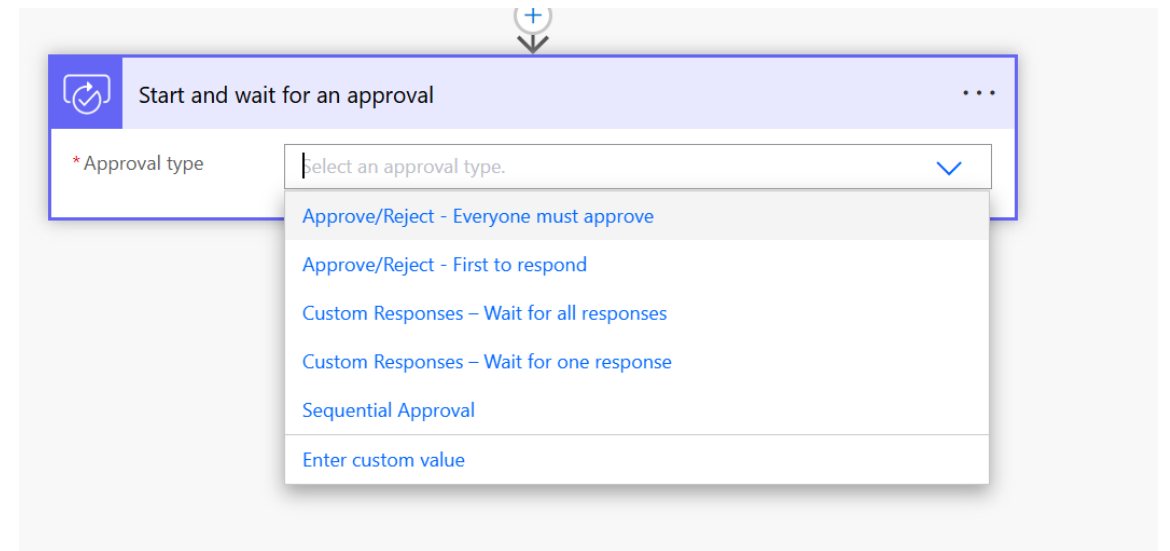
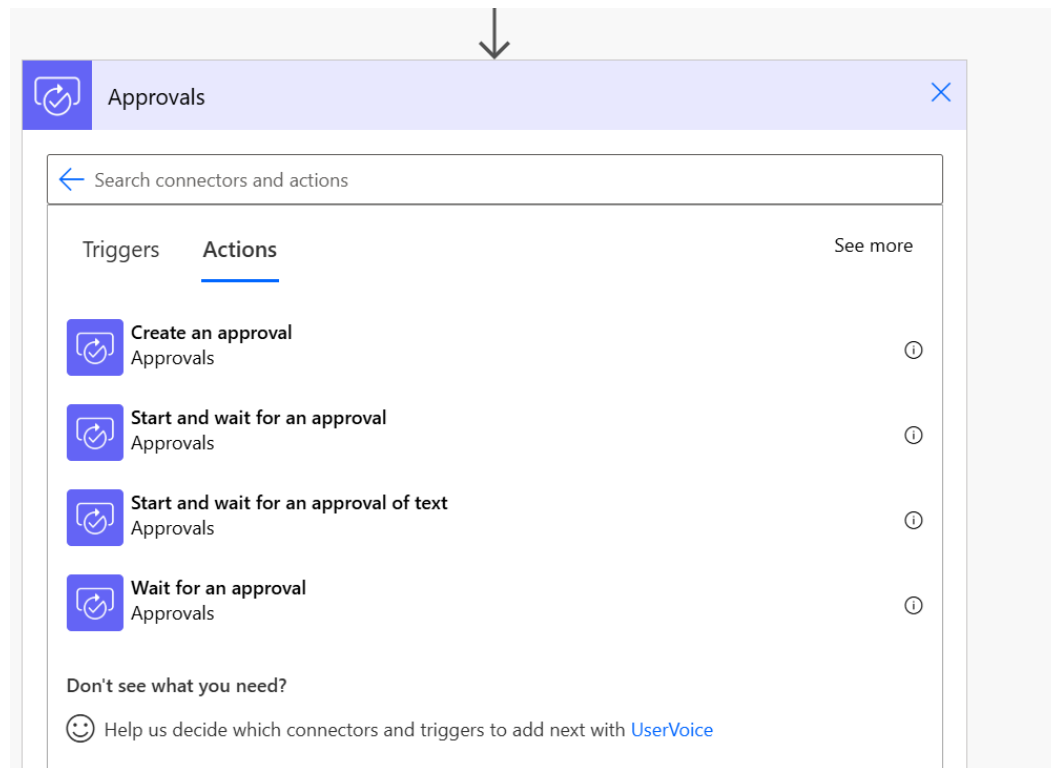


# WHAT

WHAT OPTIONS CAN I CHOOSE FROM?



# OPTIONS



# ACTION



Start and wait for an approval

...

\* Approval type

Approve/Reject - Everyone must approve

▼

\* Title

Create a title for the approval

\* Assigned to

Email addresses, separated by a semicolon (;)

Details

Markdown supported (see <https://aka.ms/approvaldetails>)

Item link

Add a link to the item to approve

Item link description

Describe the link to the item

Requestor

Add the email of the person generating this request

Enable notifications

Yes

▼

Enable reassignment

Yes

▼

Attachments Name - 1

Attachment name

Attachments Content - 1

Attachment content

+ Add new item

Hide advanced options ^

+ New step

Save



Start and wait for an approval



Parameters

Settings

Code view

Testing

About

Approval type \*

Approve/Reject - Everyone must approve



Title \*

Purchase order approval request (Dynamics 365 Business Central)

Assigned to \*



Switch to Advanced Mode

M markus.erlandsson@bisqo.se



Enter part of a name or email address to find more people



Details

An approval requested by Display Name × for Purchase Order number × totaling amountIncluding... × for buyFromVendorN... × must be approved.

Item link

Web Client URL ×

Item link description

Purchase Order number ×

Advanced parameters

Showing 3 of 4



Show all

Clear all

Requestor



Switch to Basic Mode

body/Requested ... ×



Enable notifications

Yes



Enable reassignment

Yes



Connected to Approvals.

[Change connection](#)

...

Bisqo

Search (Ctrl+Alt+E)

Stay in the know. Turn on desktop notifications. Turn on ×

Activity

Chat

Teams

Calendar

Calls

OneDrive

Planner

Bookings

Approvals

1

Approvals

Received

Sent

+ New approval request

Filter

2

Bisqo - Dynamics - Sandbox

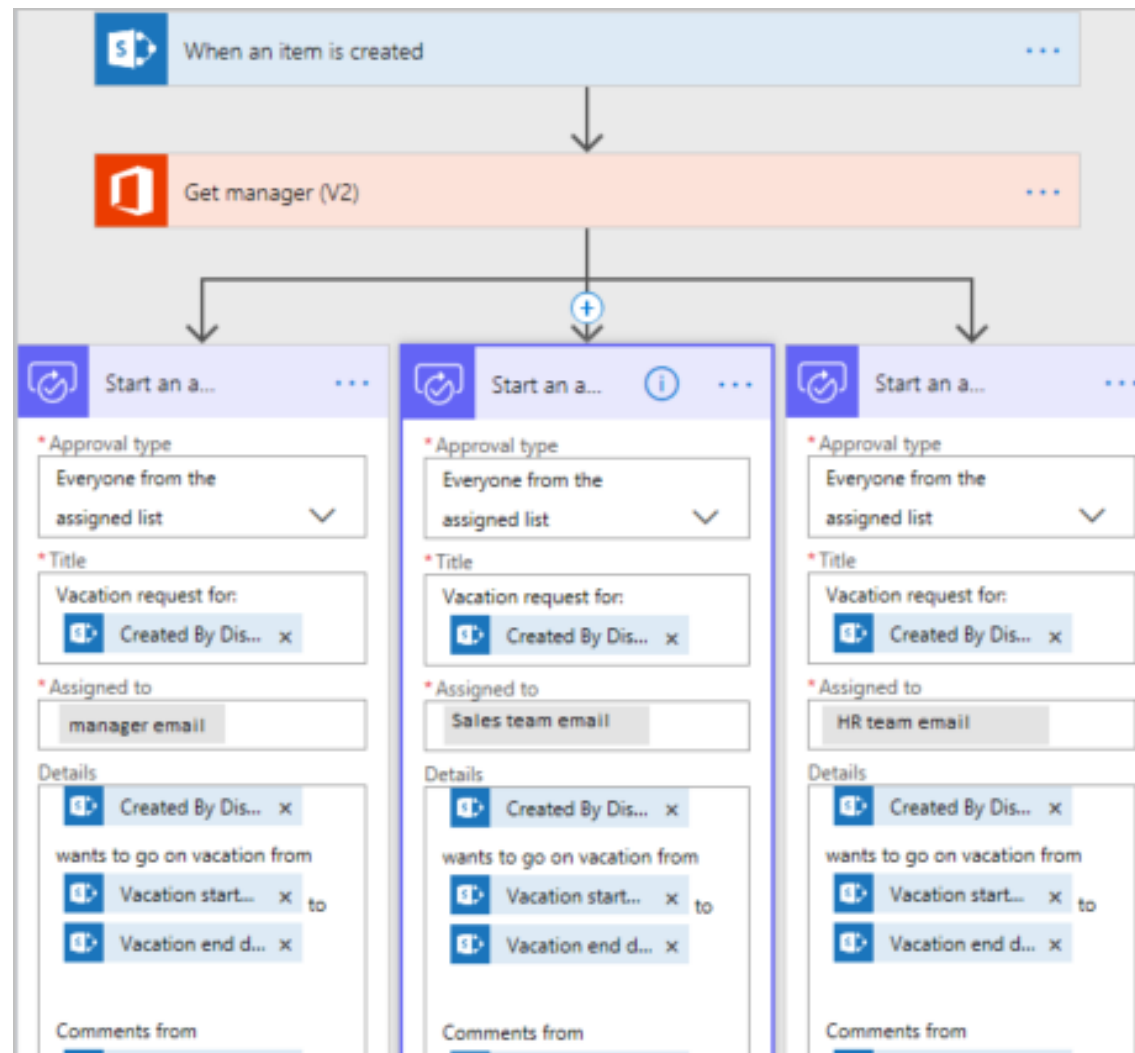
Export

Priority	Request title	Status	Source	Created	Sent by	Sent to	
	Ny test hehe	Rejected	Approvals	09/01/2025, 15:50:23			...
	2025-01-09	Rejected	Approvals	09/01/2025, 13:29:20	Markus Erlandsson	Markus Erlandsson	...

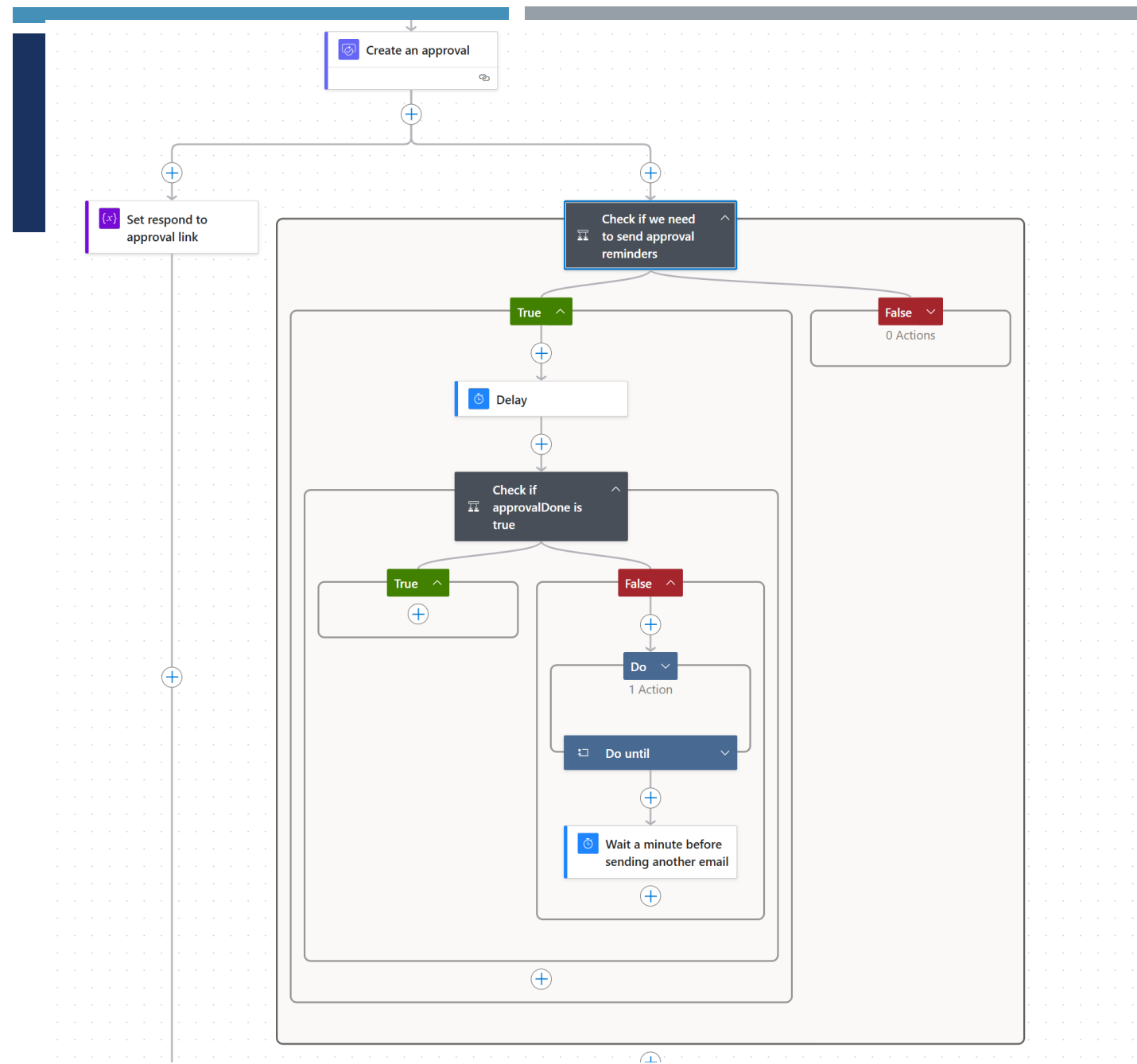
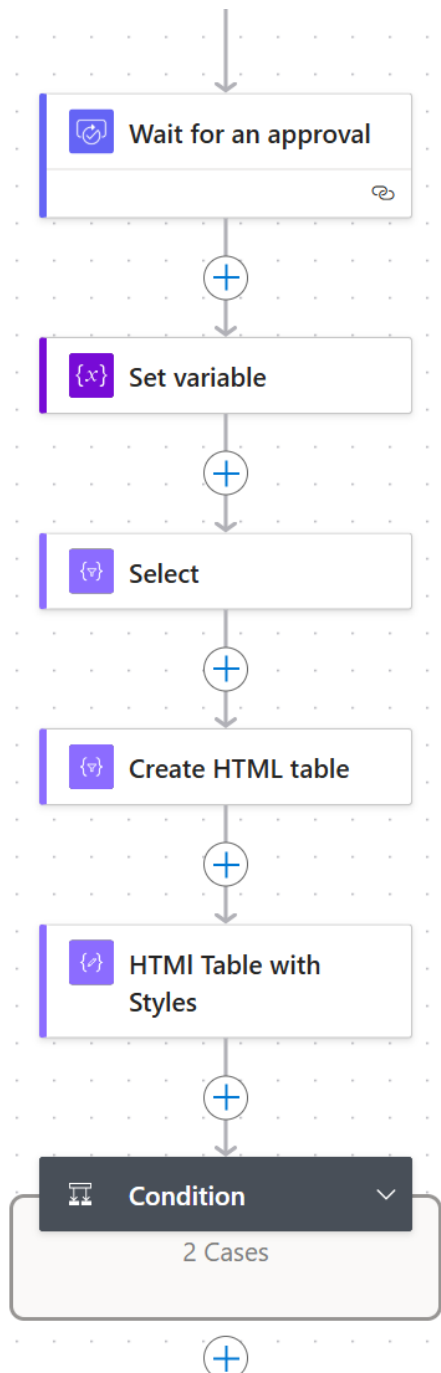
Filter Bisqo - Dynamics - Sandbox Export

Approvals

Priority	Request title	Status	Source	Created	Sent by	Sent to	
	2025-01-09	Rejected	Approvals	09/01/2025, 13:29:20	Markus Erlandsson	Markus Erlandsson	...
	Igen	Requested	Approvals	19/12/2024, 09:08:58	Markus Erlandsson		...
	Hur ser detta ut i Dataverse tabellen?	Requested	Approvals	19/12/2024, 08:58:27	Markus Erlandsson		...









# TEMPLATES

MICROSOFT HAVE SOLVED SOMETHINGS ALREADY



# MICROSOFT TEMPLATES

The screenshot displays the Microsoft Power Automate interface, specifically the 'Approval' templates section. The interface is divided into a sidebar on the left and a main content area on the right.

**Sidebar (Left):**

- Home
- Create
- Templates** (highlighted with a red box and number 2)
- Learn
- My flows
- Approvals
- Solutions
- Process mining
- Desktop flow activity
- Connections
- More
- Power Platform

**Header (Top):**

- Power Automate (highlighted with a red box and number 1)
- Search
- Environments: Dynamics SWE
- Settings, Help, and Profile icons

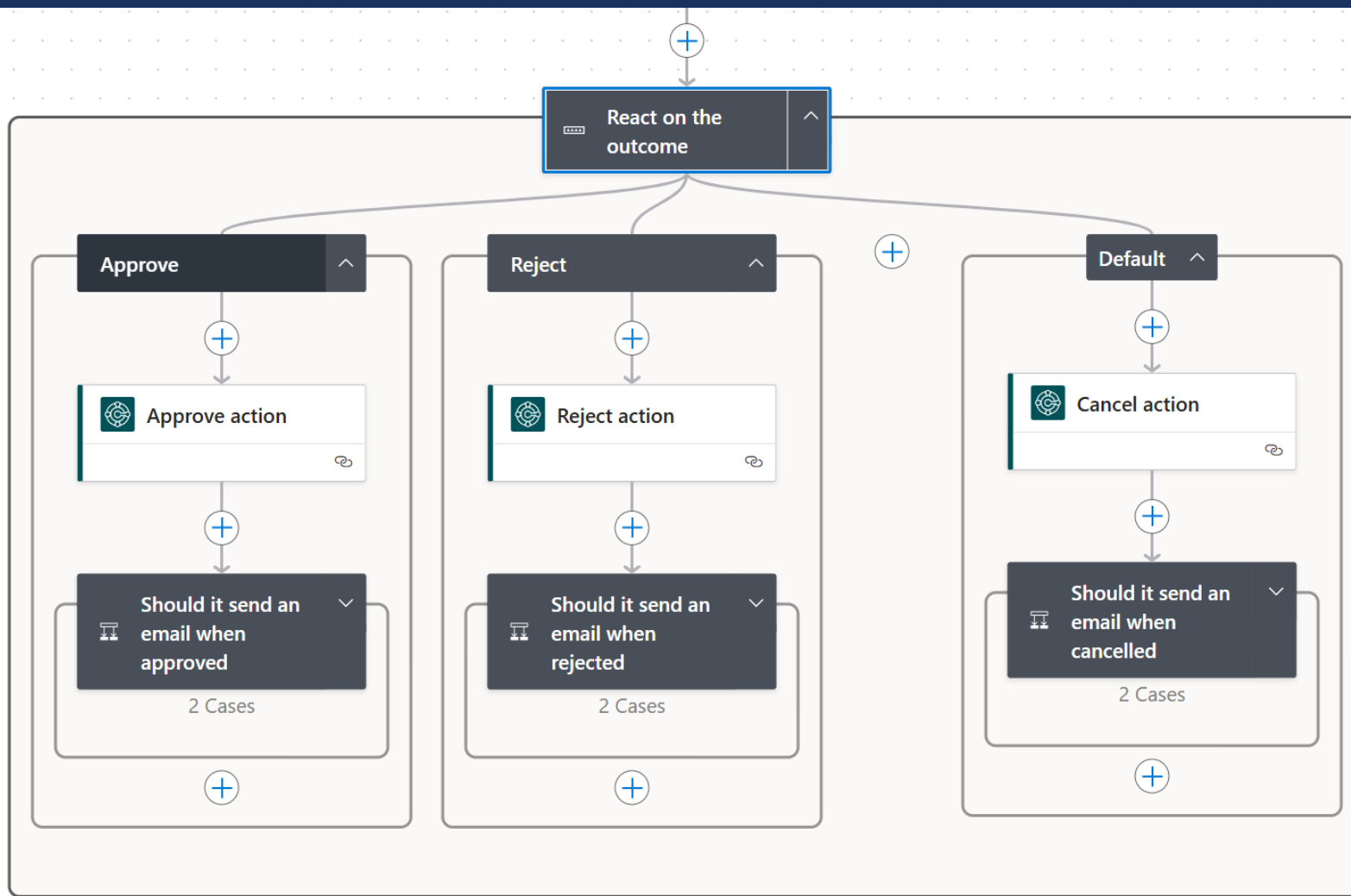
**Main Content Area:**

**Search and Filter:**

- Search templates
- Sorted by popularity
- Filter tabs: All templates, Top picks, Shared with me, Remote work (highlighted with a red box and number 3), **Approval** (highlighted with a red box), Button, Visio, Data collection, Email, Calendar, Mobile, ...

**Approval Templates Grid:**

Template Title	Author	Popularity Count
Create a Planner task when a Microsoft Forms is submitted	By Microsoft	63632
Start an approval when a file is added to SharePoint	By Microsoft	166528
Start an approval when a response is submitted in Forms	By Microsoft Power Automate Community	144634
Request approval (everyone must approve) for a selected item	By Microsoft	93556
Request approval (everyone must approve) for a selected file	By Microsoft Power Automate Community	51093
Start an approval when a SharePoint list is modified	By Microsoft	47941
Send approval and follow up via Teams	By Microsoft Power Automate Community	46456
Request approval (first to respond) for a selected file	By Microsoft Power Automate Community	33277
Approval request process for a Microsoft Teams channel	By Microsoft Power Automate Community	
Request approval (first to respond) for a selected item	By Microsoft	
Get an email report of approvals waiting for my response	By Microsoft	
On approval, move a new OneDrive for Business file to a different folder		





# LOOKING UNDER THE COVER

HOW HAS MICROSOFT BUILT THIS

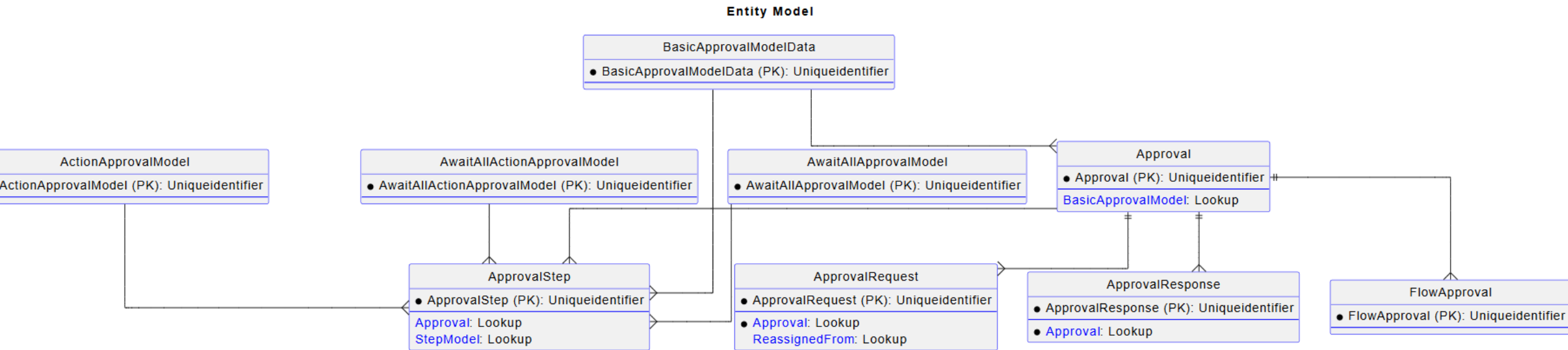




# POWER APPS | SOLUTIONS - MICROSOFT FLOW APPROVALS CORE SOLUTION

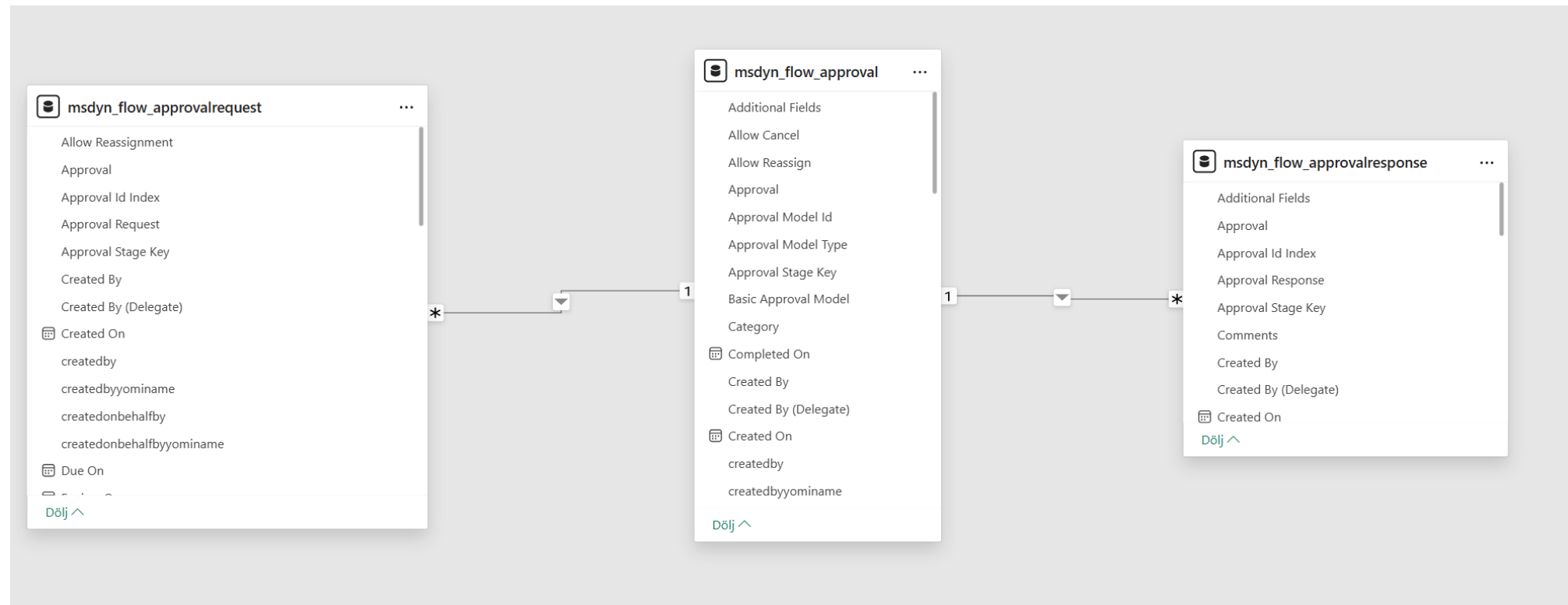
- Power Apps | Solutions - Microsoft Flow Approvals Core Solution
- msdyn\_FlowApprovalsCore
- msdyn\_FlowApprovals

# POWER APPS | SOLUTIONS - MICROSOFT FLOW APPROVALS CORE SOLUTION

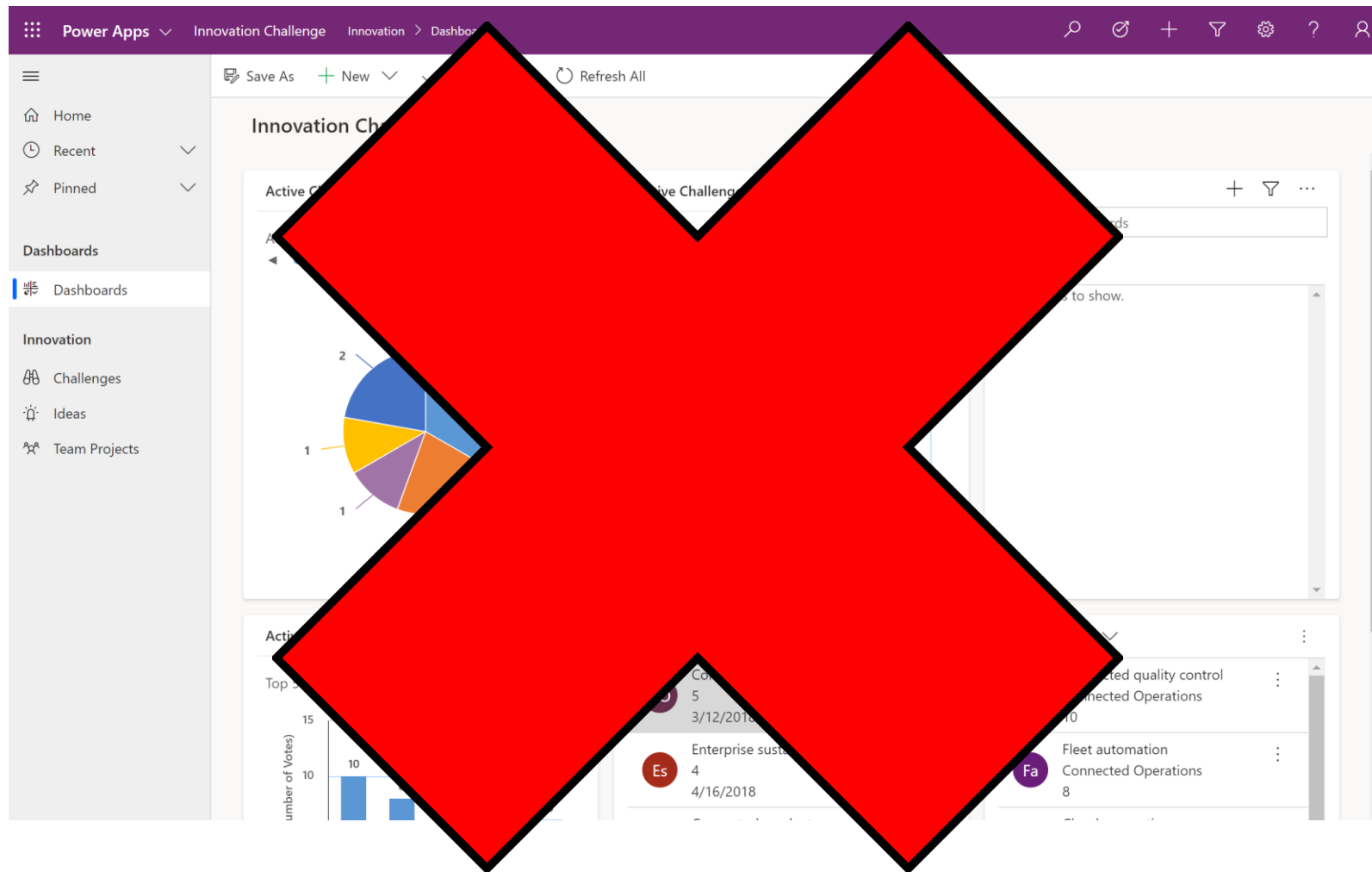


Generated 2025-01-03 by UML Diagram Generator 1.2024.11.4 for XrmToolBox

# POWER APPS | SOLUTIONS - MICROSOFT FLOW APPROVALS CORE SOLUTION



# CREATE AN APP FOR THAT



# XRMTOOLBOX

```
<fetch mapping="logical" distinct="true">
  <entity name="msdyn_flow_approval">
    <attribute name="msdyn_flow_approvalid" />
    <attribute name="msdyn_flow_approval_title" />
    <attribute name="createdon" />
    <order attribute="createdon" descending="true" />
    <filter type="and">
      <condition attribute="statecode" operator="eq" value="0" />
    </filter>
    <link-entity name="msdyn_flow_approvalrequest" alias="approvalrequest" to="msdyn_flow_approvalid" from="msdyn_flow_approvalrequestidx_approvalid" link-type="inner">
      <link-entity name="systemuser" alias="requestuser" to="ownerid" from="systemuserid" link-type="inner">
        <attribute name="internalemailaddress" />
      </link-entity>
      <link-entity name="msdyn_flow_approvalresponse" alias="approvalresponseid" to="msdyn_flow_approvalrequestidx_approvalid" from="msdyn_flow_approvalresponseidx_approvalid" link-type="outer" />
    </link-entity>
    <filter type="and">
      <condition entityname="approvalresponseid" attribute="ownerid" operator="ne" valueof="approvalrequest.ownerid" />
    </filter>
  </entity>
</fetch>
```

[https://www.reddit.com/r/Dynamics365/comments/13i8k15/valueof\\_Zin\\_fetchxml\\_works\\_across\\_entities\\_now/?rdt=40254](https://www.reddit.com/r/Dynamics365/comments/13i8k15/valueof_Zin_fetchxml_works_across_entities_now/?rdt=40254)

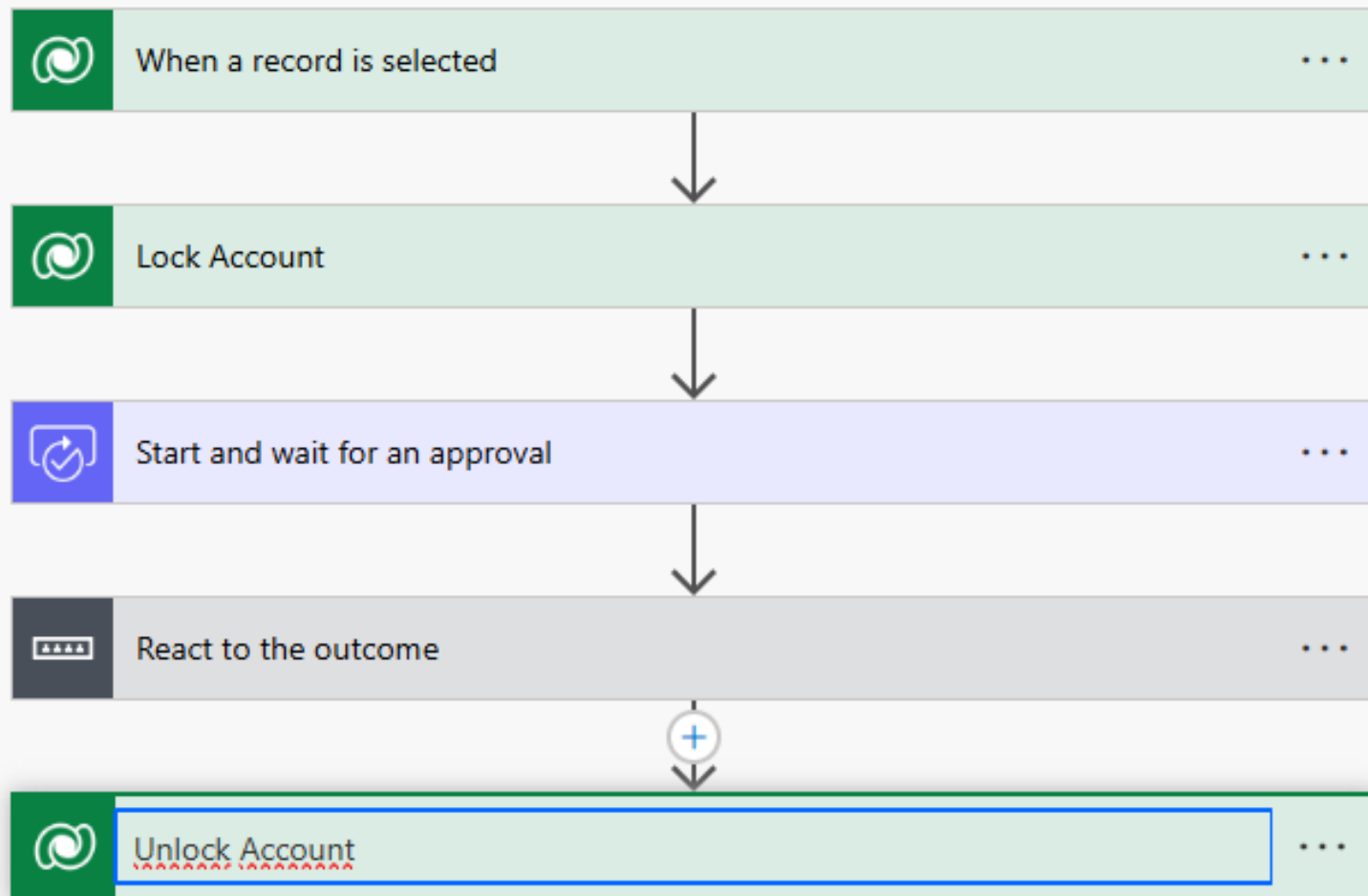
<https://www.linkedin.com/pulse/how-get-direct-link-any-approval-type-microsofts-power-nigel-smith/>



# XRMTOOLBOX

FetchXML					
Result View					
Approval	Title	Created On	createdon	Primary Email (User)	
a8cdacd4-9541-48fb-8c17-b39300d12d2f	Igen	2024-12-19 08:08:58	2024-12-19 08:08		
dac9a512-1a69-4120-a3dc-af2cb8c2fae1	Hur ser detta ut i Dataverse tabellen?	2024-12-19 07:58:27	2024-12-19 07:58		

# CANCEL RUNS



# TIPS

- One Environment
- Short flows
- Re-runs
- Cancel flows
- Overview of outstanding requests
  - For me
  - For everyone

# SKIP APPROVALS

Flow 2:13 PM

### Lead Notification

Please fill out a single form for each individual expressing interest in our products. You may query for existing contacts using [contacts] in the Leads channel.

Potential Customer FIRST NAME

First name

Potential Customer LAST NAME

Last name

Corporate email

email@example.com

Business Phone Number


1+XXX.XXX.XXXX

☐ Office 365  
☐ Dynamics 365  
☐ Azure Services  
☐ Power Platform

Submit

Flow 11/21 8:31 AM


Bellevue, WA  
11/21/2019 8:30 AM

 49 °F Hi 49 Lo 34

← Reply

Flow 11:33 AM

### Model Repair Order

 Megan Bowen  
Created 2019 Jun 15

Fence broken

Home Site: Homesite 115  
Category: PunchList

Complete Task Add Notes

← Reply

Flow 6:01 PM

### Request for Information

Question

Enter your question, or request for clarification

Reference

Paste URL here

Category


☐ Design Drawing  
☐ Specifications  
☐ Equipment  
☐ Permits

Set due date

Megan Bowen 3:33 PM  
tel:555-0150

← Reply

Flow 3:33 PM



Name Fourth Coffee (sample)  
Do not allow email False  
Do not allow calls False  
Address 2223 N. West Shore Boulevard, Tampa, FL

More Info

Flow 6:14 PM

### Best part of this presentation?

☐ Practical content  
☐ Simple instructions  
☐ New ideas  
☐ Tips and tricks

Submit

Giuliano De Luca via Power Automate 26/09 11:14

Asset Request B12

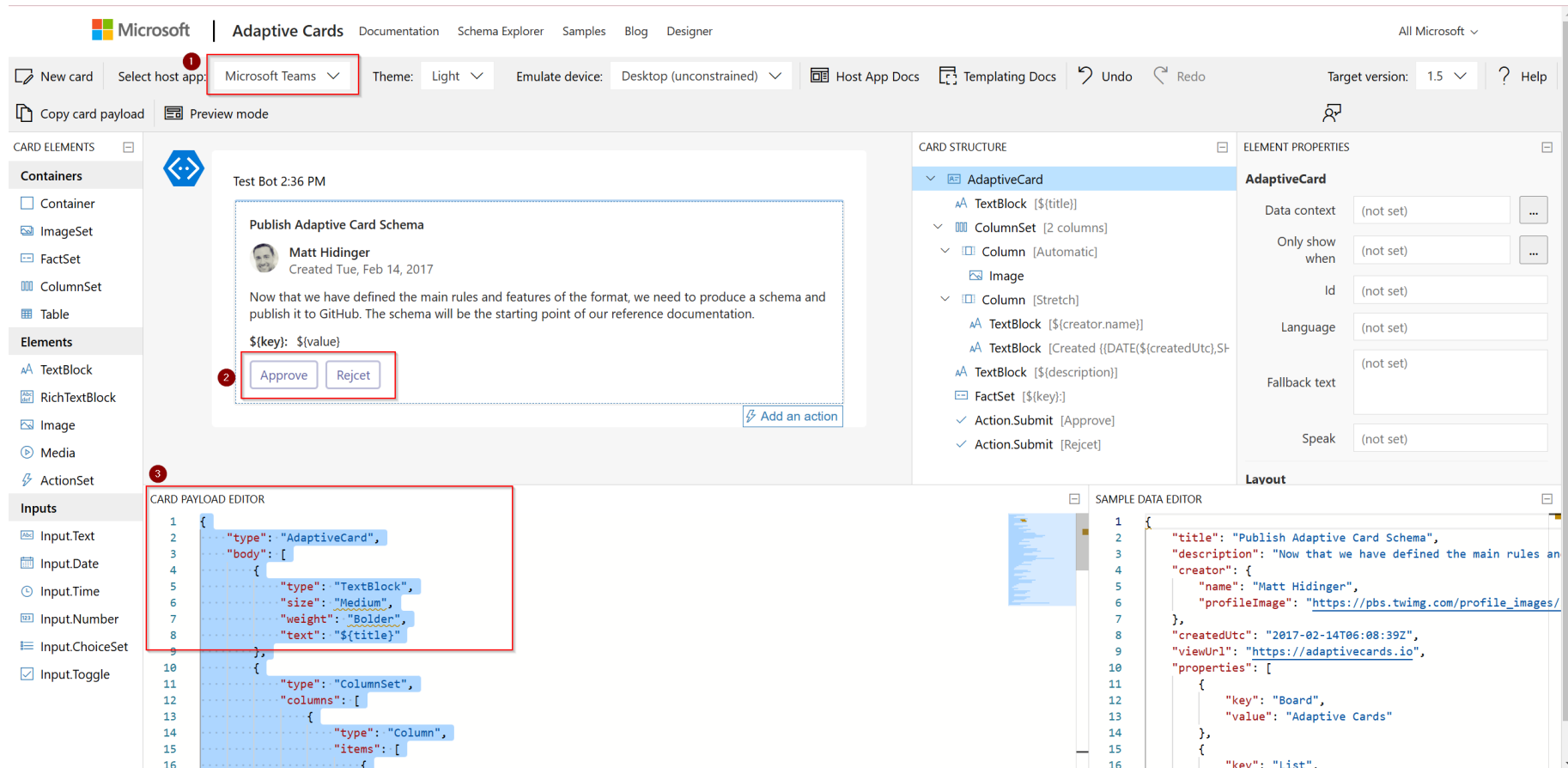
Submitted by **Lee Gu**

Approval pending from **Giuliano and Diego**

Approve Reject

← Reply

# HTTPS://ADAPTIVECARDS.IO/DESIGNER/



Microsoft | Adaptive Cards Documentation Schema Explorer Samples Blog Designer All Microsoft

New card Select host app: Microsoft Teams Theme: Light Emulate device: Desktop (unconstrained) Host App Docs Templating Docs Undo Redo Target version: 1.5 Help

Copy card payload Preview mode

CARD ELEMENTS

- Containers
  - Container
  - ImageSet
  - FactSet
  - ColumnSet
  - Table
- Elements
  - TextBlock
  - RichTextBlock
  - Image
  - Media
  - ActionSet
- Inputs
  - Input.Text
  - Input.Date
  - Input.Time
  - Input.Number
  - Input.ChoiceSet
  - Input.Toggle

Test Bot 2:36 PM

Publish Adaptive Card Schema

Matt Hiding  
Created Tue, Feb 14, 2017

Now that we have defined the main rules and features of the format, we need to produce a schema and publish it to GitHub. The schema will be the starting point of our reference documentation.

\$(key): \$(value)

Approve Reject

Add an action

CARD STRUCTURE

- AdaptiveCard
  - TextBlock [title]
  - ColumnSet [2 columns]
    - Column [Automatic]
      - Image
        - TextBlock [creator.name]
        - TextBlock [Created [DATE(\$createdUtc), \$...]]
        - TextBlock [description]
        - FactSet [key:]
        - Action.Submit [Approve]
        - Action.Submit [Reject]

ELEMENT PROPERTIES

AdaptiveCard

Data context (not set)

Only show when (not set)

Id (not set)

Language (not set)

Fallback text (not set)

Speak (not set)

Layout

CARD PAYLOAD EDITOR

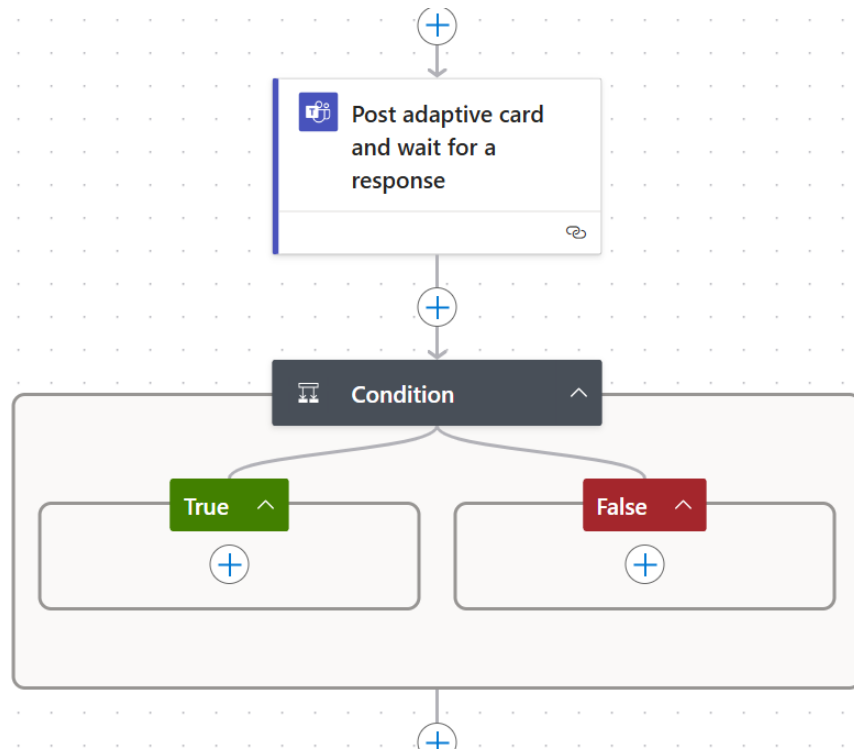
```
1 {
2   "type": "AdaptiveCard",
3   "body": [
4     {
5       "type": "TextBlock",
6       "size": "Medium",
7       "weight": "Bolder",
8       "text": "${title}"
9     },
10    {
11      "type": "ColumnSet",
12      "columns": [
13        {
14          "type": "Column",
15          "items": [
16            {
```

SAMPLE DATA EDITOR

```
1 {
2   "title": "Publish Adaptive Card Schema",
3   "description": "Now that we have defined the main rules an
4   "creator": {
5     "name": "Matt Hiding",
6     "profileImage": "https://pbs.twimg.com/profile_images/
7   },
8   "createdUtc": "2017-02-14T06:08:39Z",
9   "viewUrl": "https://adaptivecards.io",
10  "properties": [
11    {
12      "key": "Board",
13      "value": "Adaptive Cards"
14    },
15    {
16      "key": "List",
```



# SKIP APPROVALS



<https://learn.microsoft.com/en-us/microsoftteams/platform/task-modules-and-cards/cards/design-effective-cards>

**Post adaptive card and wait for a response**

Parameters Settings Code view Testing About

Post as \*  
Flow bot

Post in \*  
Channel

Message \*  
s

Team \*  
Test av kund template

Channel \*  
General

Advanced parameters  
Showing 1 of 1 Show all Clear all

Update message  
Thanks for your response! X

Connected to Microsoft Teams. [Change connection reference](#)



# THANK YOU

[SOMEONE@EXAMPLE.COM](mailto:SOMEONE@EXAMPLE.COM)