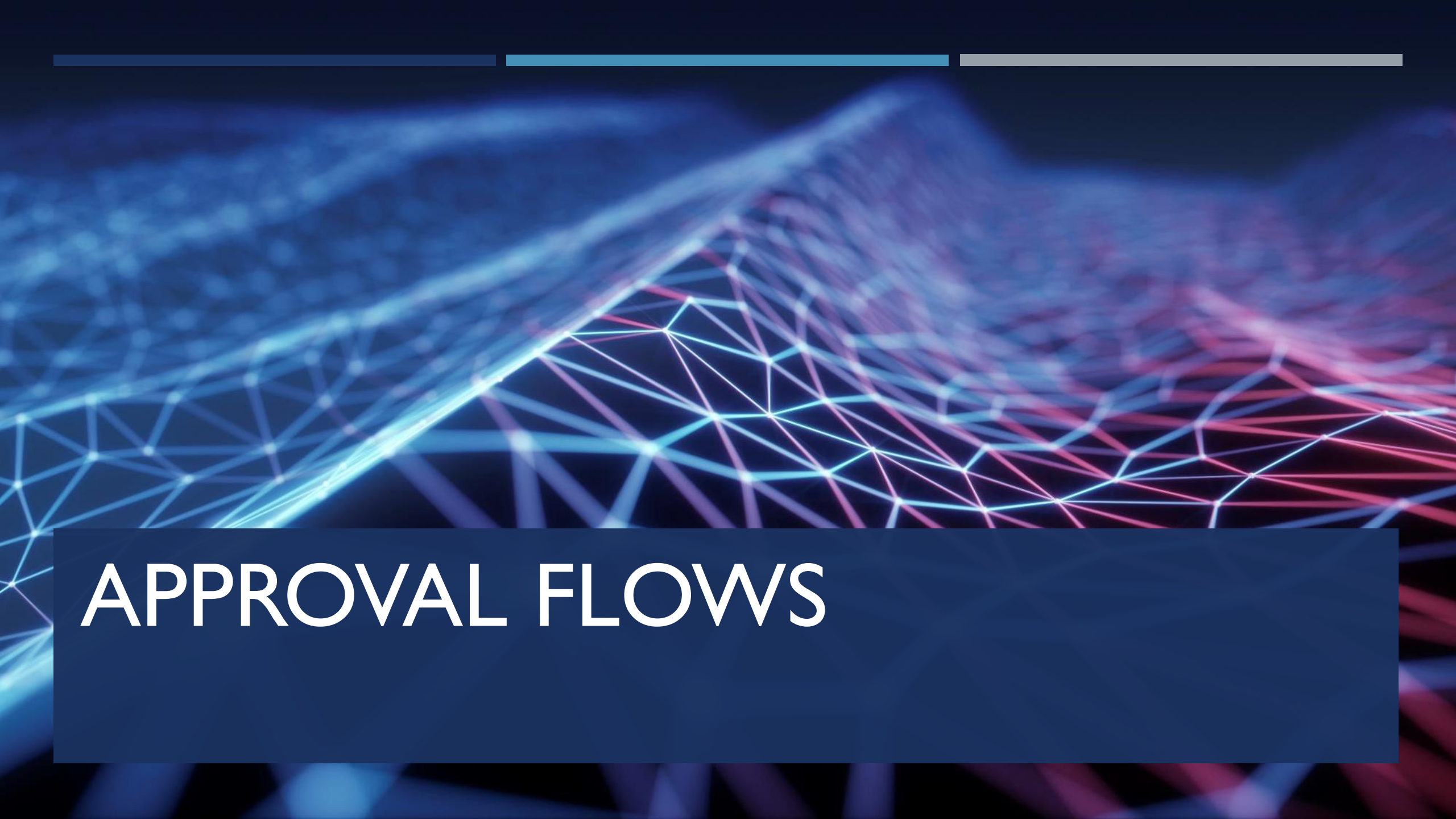


APPROVAL FLOWS

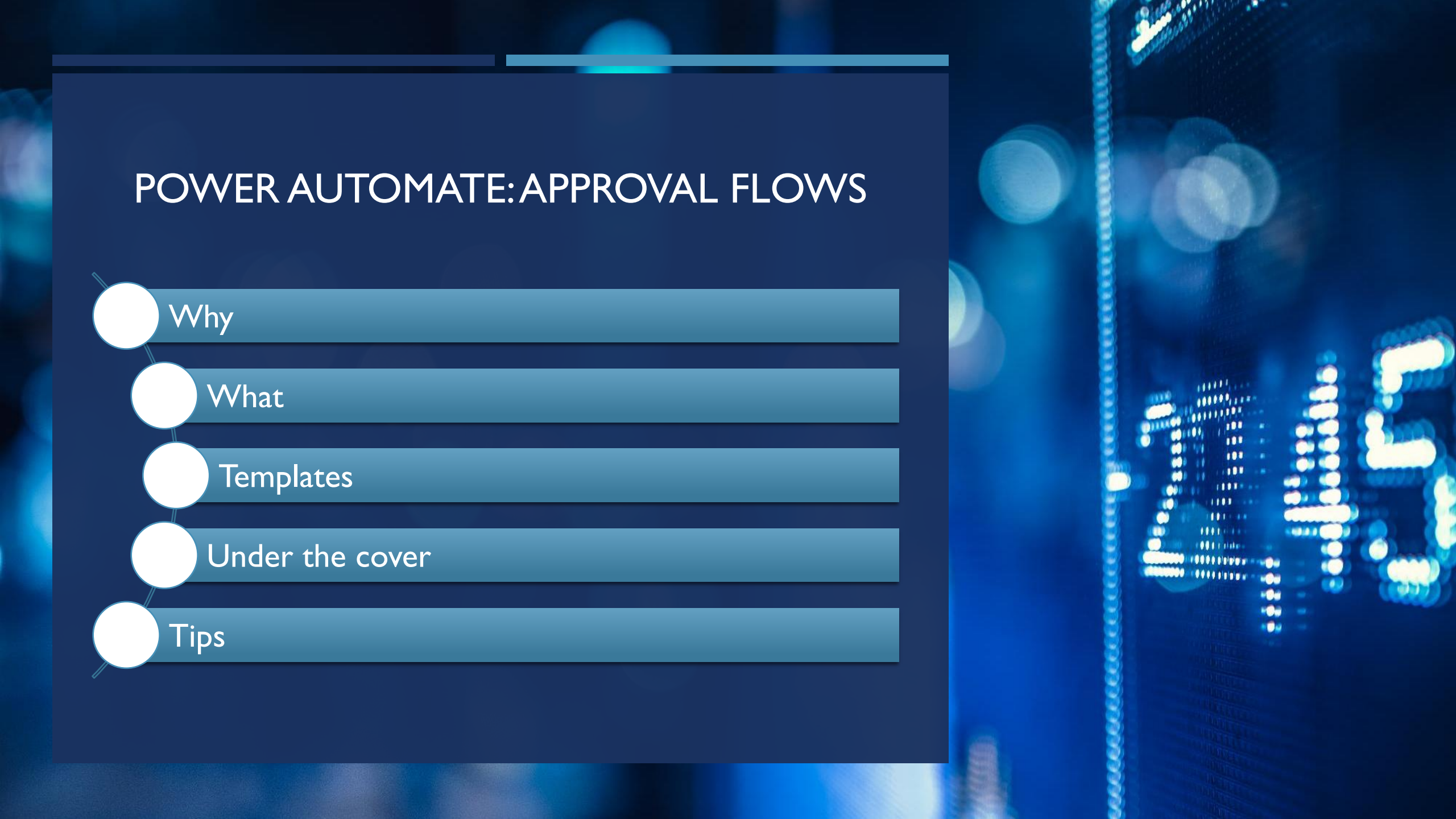
VEM ÄR JAG?

- Pappa
- Partner
- Programmer

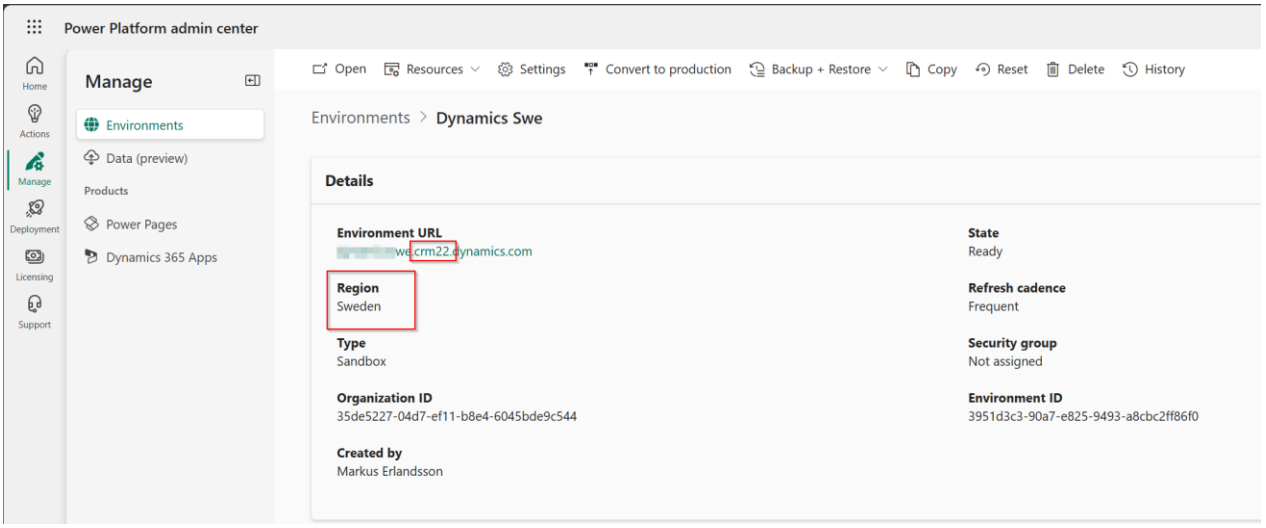
- Podcast CRM Rocks since 2013
- Power Platform Communit

POWER AUTOMATE: APPROVAL FLOWS

- Why
- What
- Templates
- Under the cover
- Tips



SWEDEN IS HERE



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

YOU GET AN APPROVAL...
YOU GET AN APPROVAL...
YOU GET AN APPROVAL...
EVERYBODY IS GETTING
AN APPROVAL!!

WHY

WHY APPROVAL FLOWS

PROBLEMS TO SOLVE

Expense Report Approvals

Leave Requests

Purchase Orders

IT Service Requests

Document Review and Approval

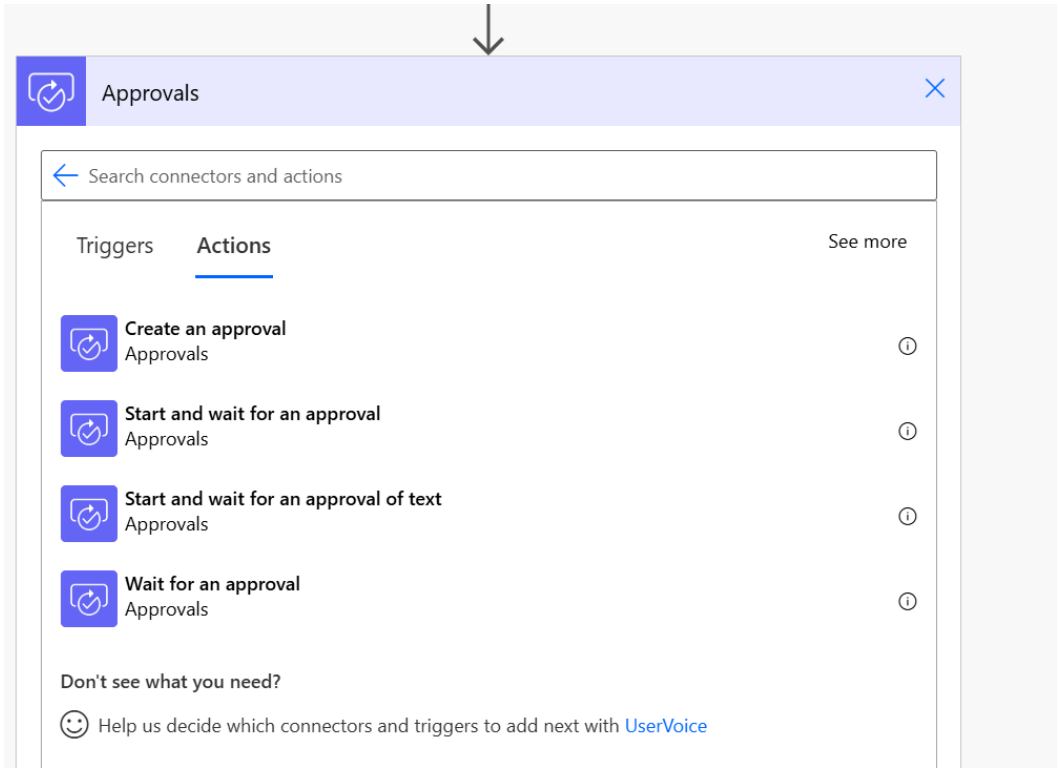
WHY

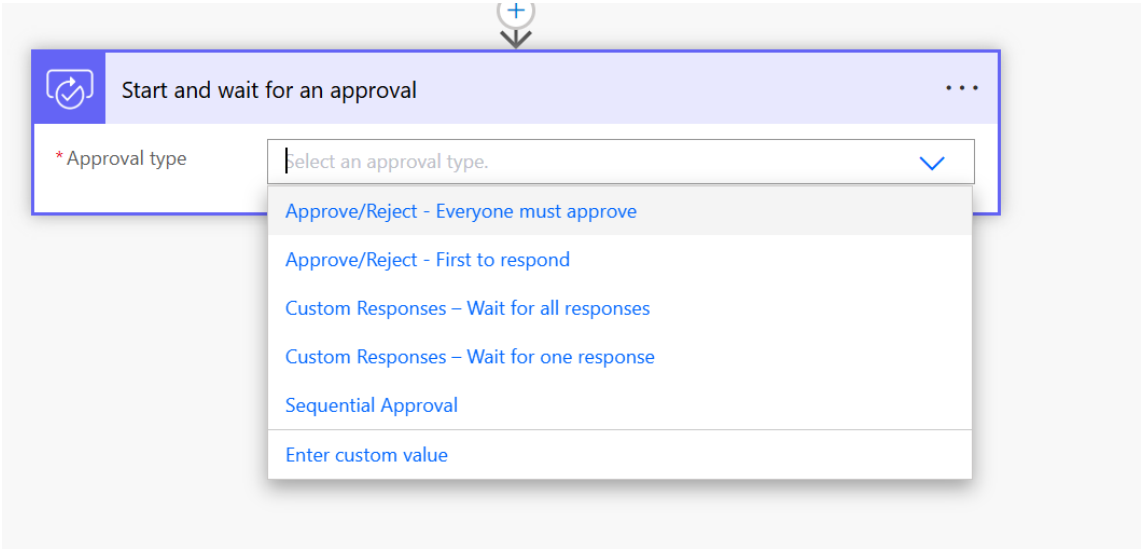
- Improved Efficiency
- Enhanced Accountability
- Consistency and Standardization
- Real-Time Notifications

WHAT

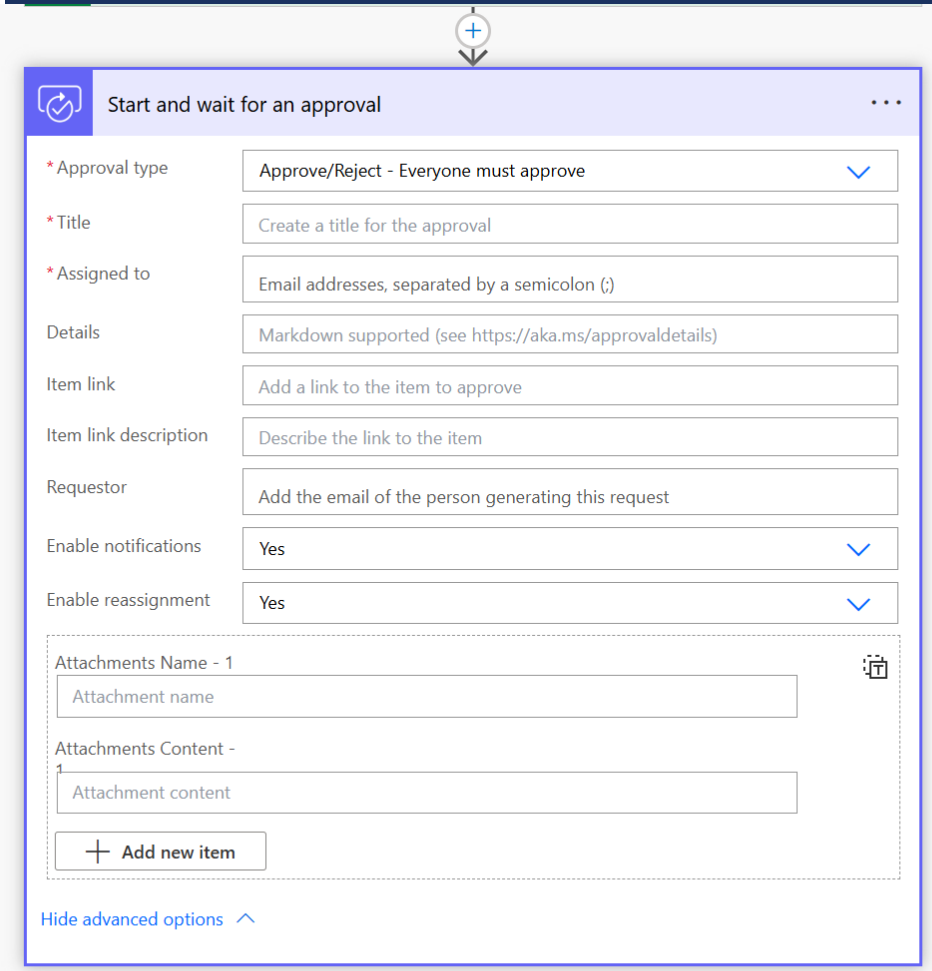
WHAT OPTIONS CAN I CHOOSE FROM?

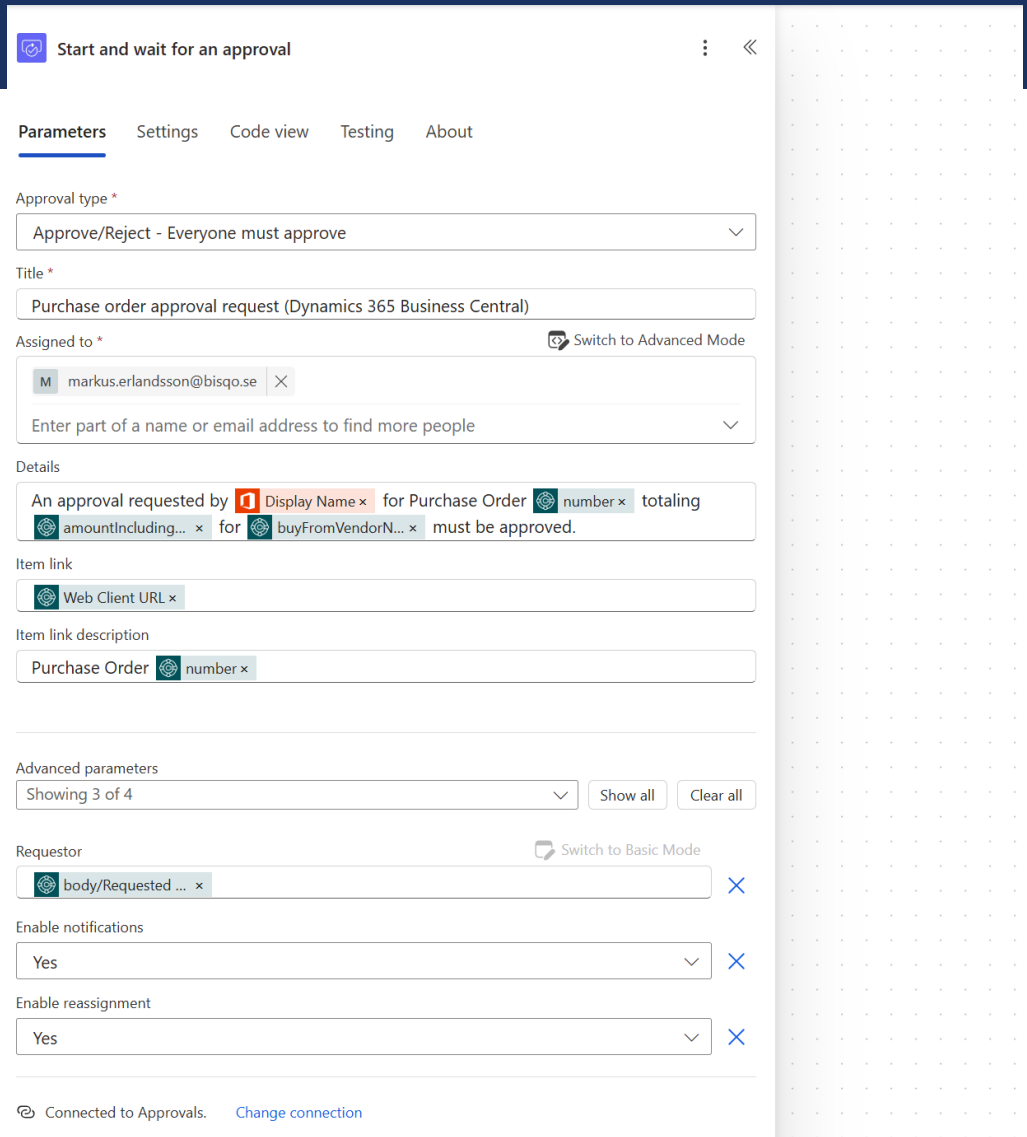
OPTIONS

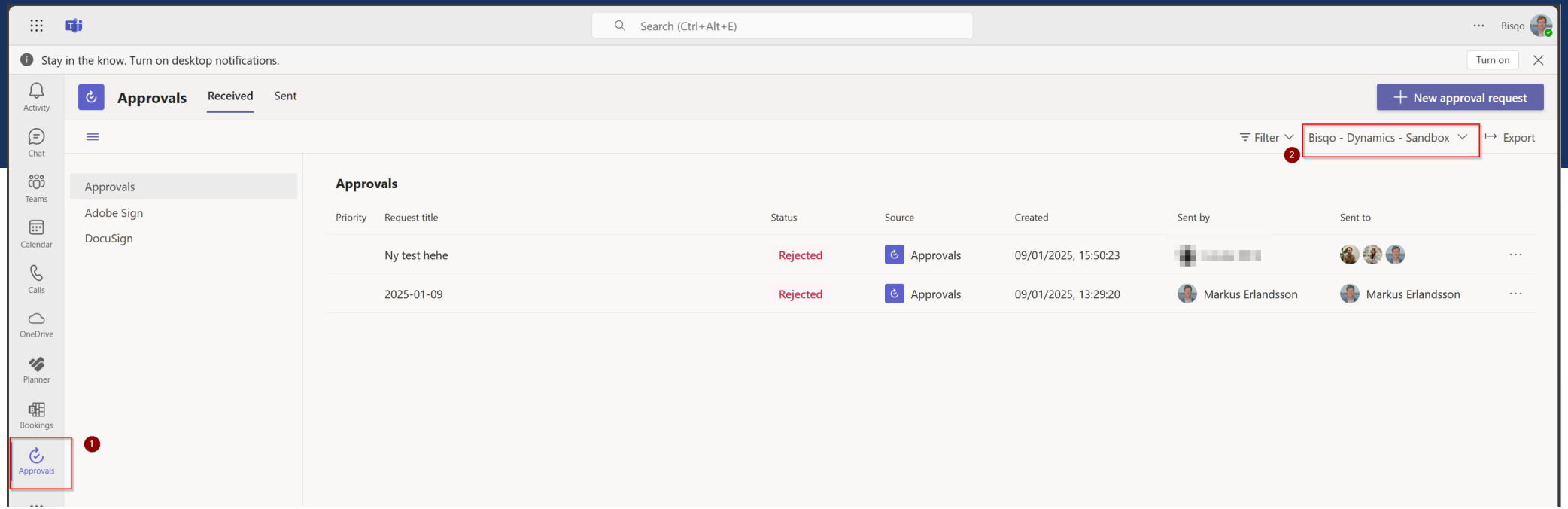

Approvals
Search connectors and actions
Triggers
Actions
See more
Create an approval
Approvals
Start and wait for an approval
Approvals
Start and wait for an approval of text
Approvals
Wait for an approval
Approvals
Don't see what you need?
Help us decide which connectors and triggers to add next with UserVoice

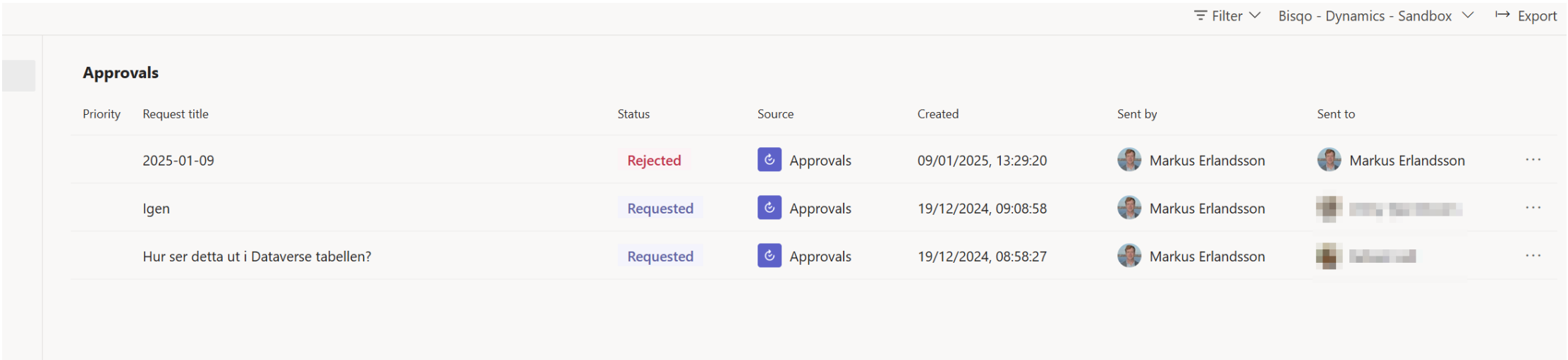

Start and wait for an approval
* Approval type
Select an approval type.
Approve/Reject - Everyone must approve
Approve/Reject - First to respond
Custom Responses – Wait for all responses
Custom Responses – Wait for one response
Sequential Approval
Enter custom value

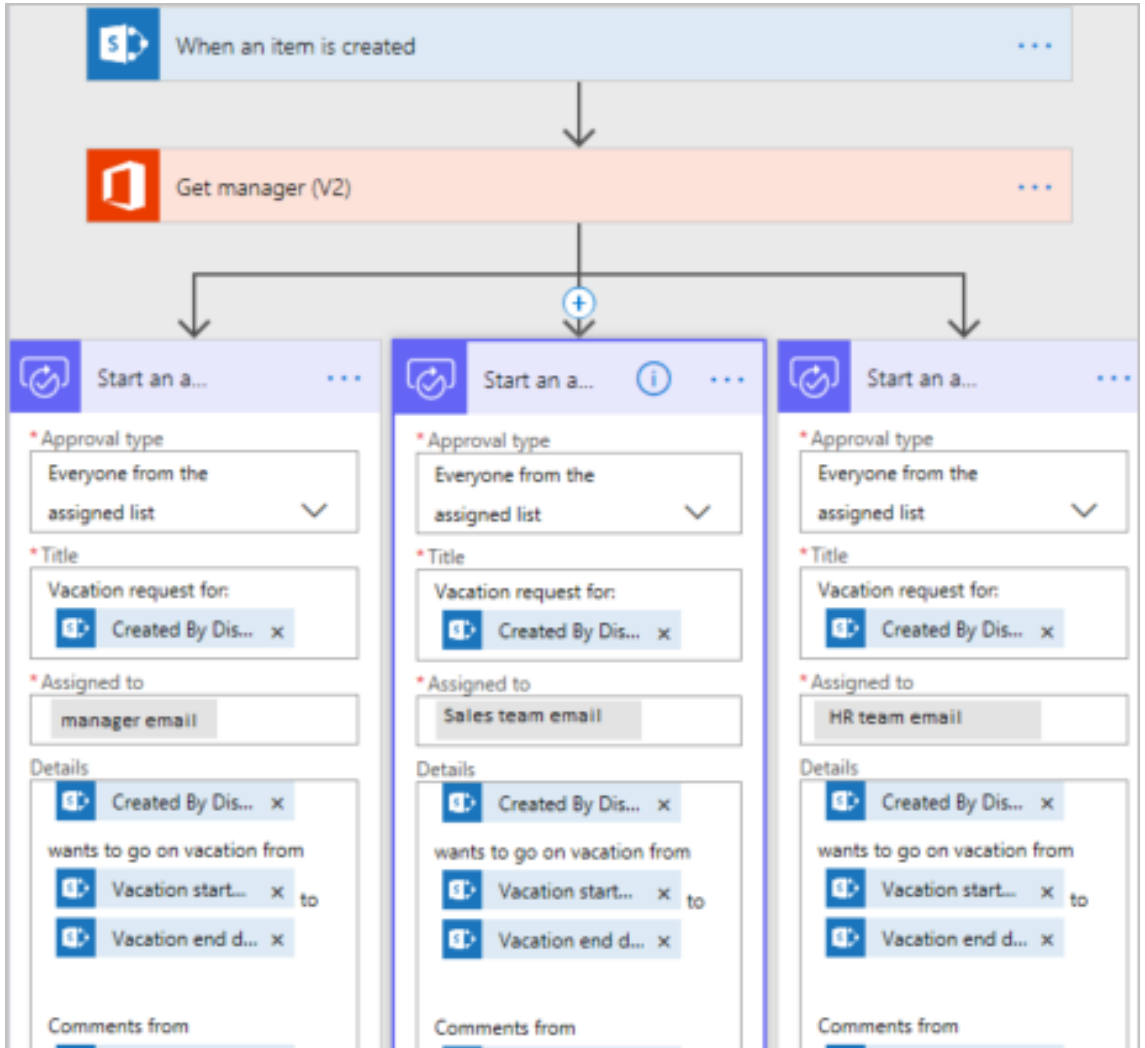
ACTION

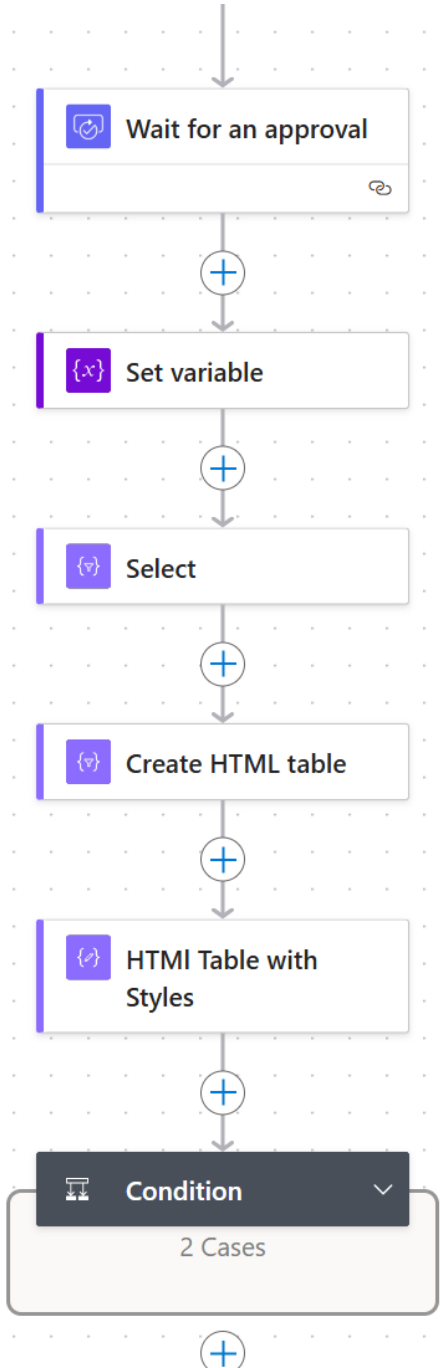

Start and wait for an approval
* Approval type
Approve/Reject - Everyone must approve
* Title
Create a title for the approval
* Assigned to
Email addresses, separated by a semicolon (;)
Details
Markdown supported (see https://aka.ms/approvaldetails)
Item link
Add a link to the item to approve
Item link 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

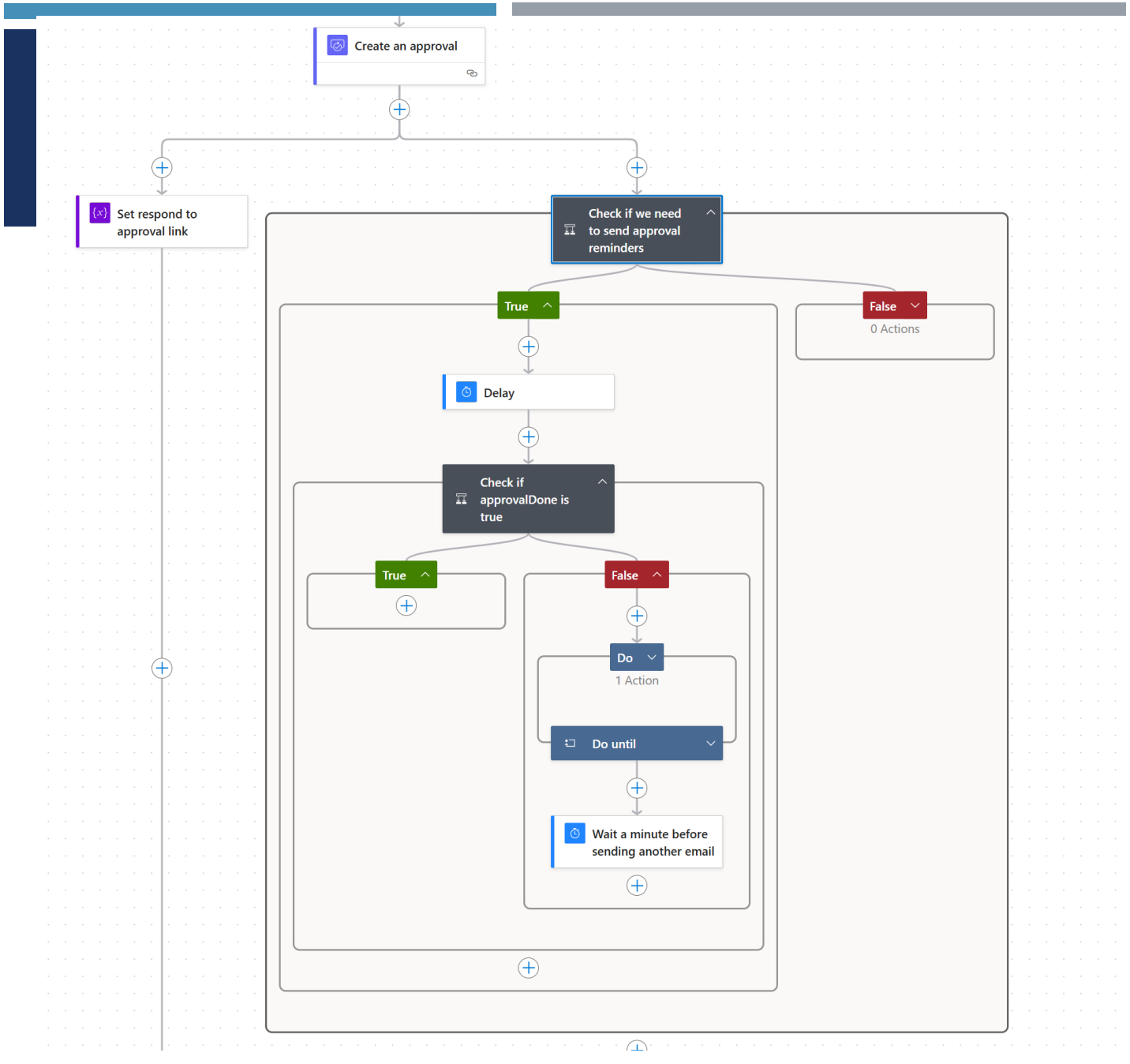

Start and wait for an approval
Parameters
Settings
Code view
Testing
About
Approval type *
Approve/Reject - Everyone must approve
Title *
Purchase order approval request (Dynamics 365 Business Central)
Assigned to *
Switch to Advanced Mode
markus.erlandsson@bisqo.se
Enter part of a name or email address 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


Search (Ctrl+Alt+E)
Bisqo
Stay in the know. Turn on desktop notifications.
Turn on
Activity
Chat
Teams
Calendar
Calls
OneDrive
Planner
Bookings
Approvals
Approvals
Received
Sent
New approval request
Filter
Bisqo - Dynamics - Sandbox
Export
Approvals
Adobe Sign
DocuSign
Approvals
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
1
2


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


When an item is created
Get manager (V2)
Start an a...
Start an a...
Start an a...
* Approval type
Everyone from the assigned list
* Title
Vacation request for:
Created By Dis...
* Assigned to
manager email
Sales team email
HR team email
Details
Created By Dis...
wants to go on vacation from
Vacation start...
to
Vacation end d...
Comments from

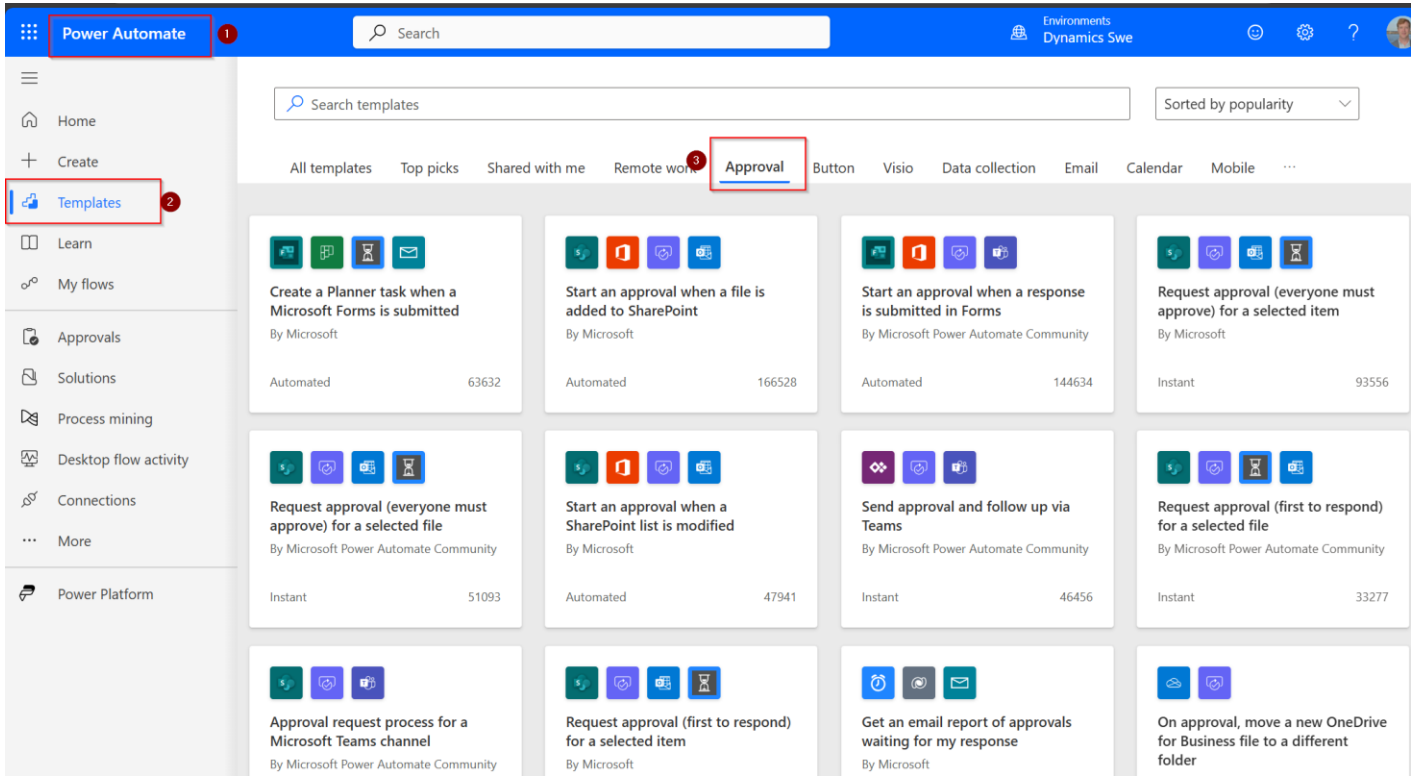

Wait for an approval
Set variable
Select
Create HTML table
HTMI Table with Styles
Condition
2 Cases

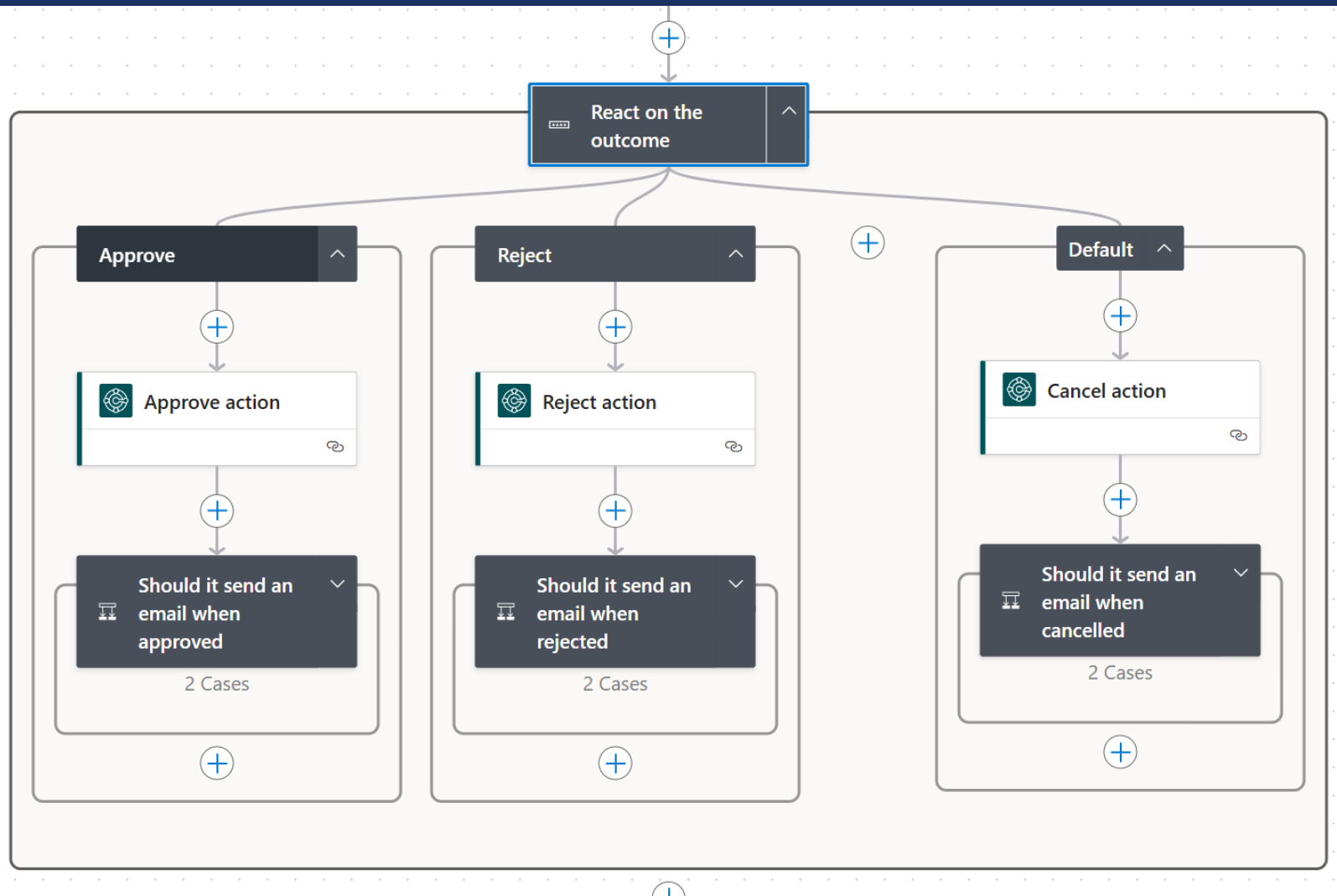

Create an approval
Set respond to approval link
Check if we need to send approval reminders
True
False
0 Actions
Delay
Check if approvalDone is true
True
False
Do
1 Action
Do until
Wait a minute before sending another email

TEMPLATES

MICROSOFT HAVE SOLVED SOMETHINGS ALREADY

MICROSOFT TEMPLATES




React on the outcome
Approve
Approve action
Should it send an email when approved
2 Cases
Reject
Reject action
Should it send an email when rejected
2 Cases
Default
Cancel action
Should it send an email when cancelled
2 Cases

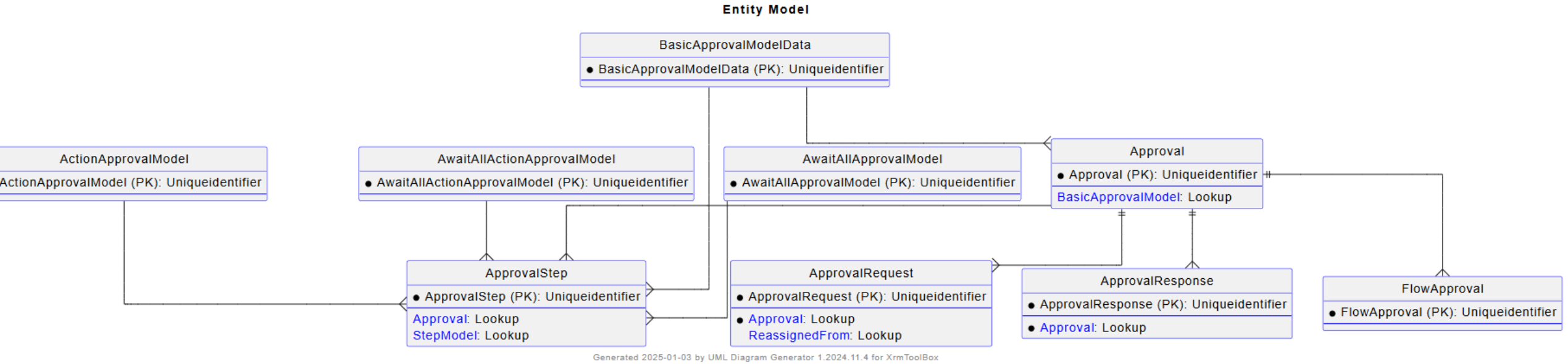
LOOKING UNDER THE COVER

HOW HAS MICROSOFT BUILT THIS

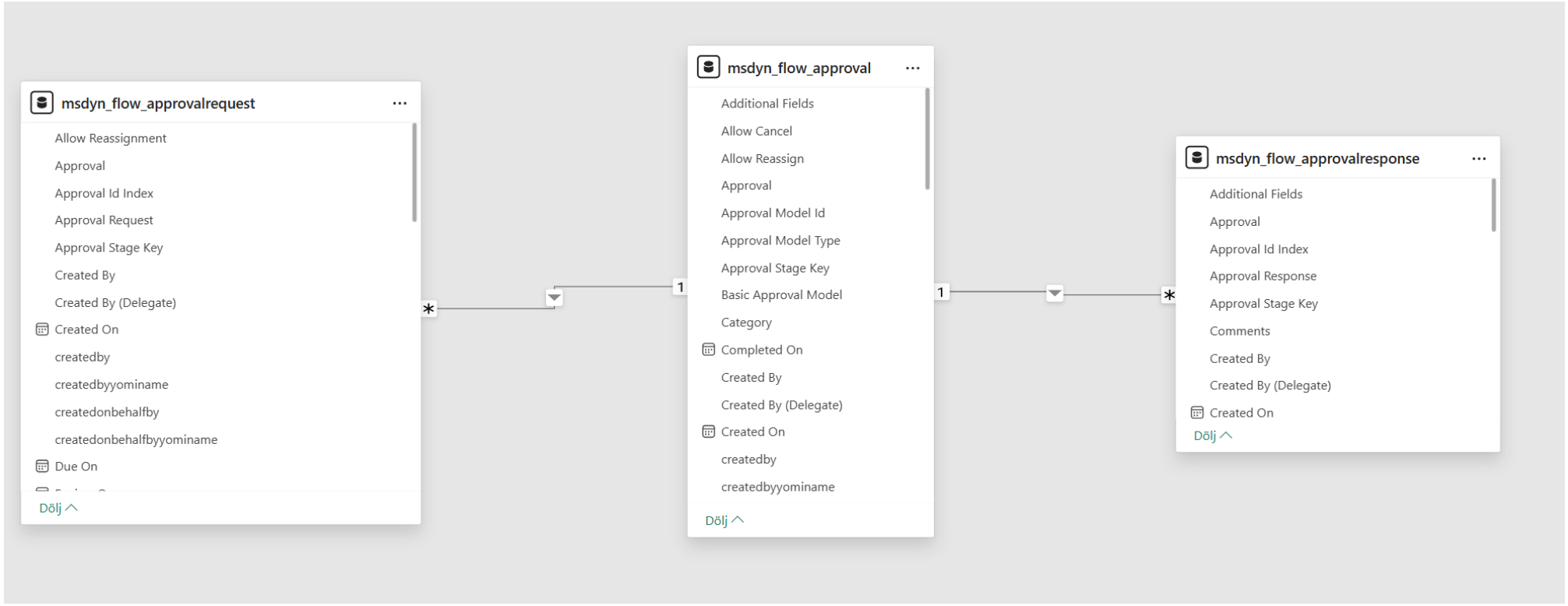
POWER APPS | SOLUTIONS - MICROSOFT FLOW APPROVALS CORE SOLUTION

- Power Apps | Solutions - Microsoft Flow Approvals Core Solution
- msdyn_FlowApprovalsCore
- msdyn_FlowApprovals

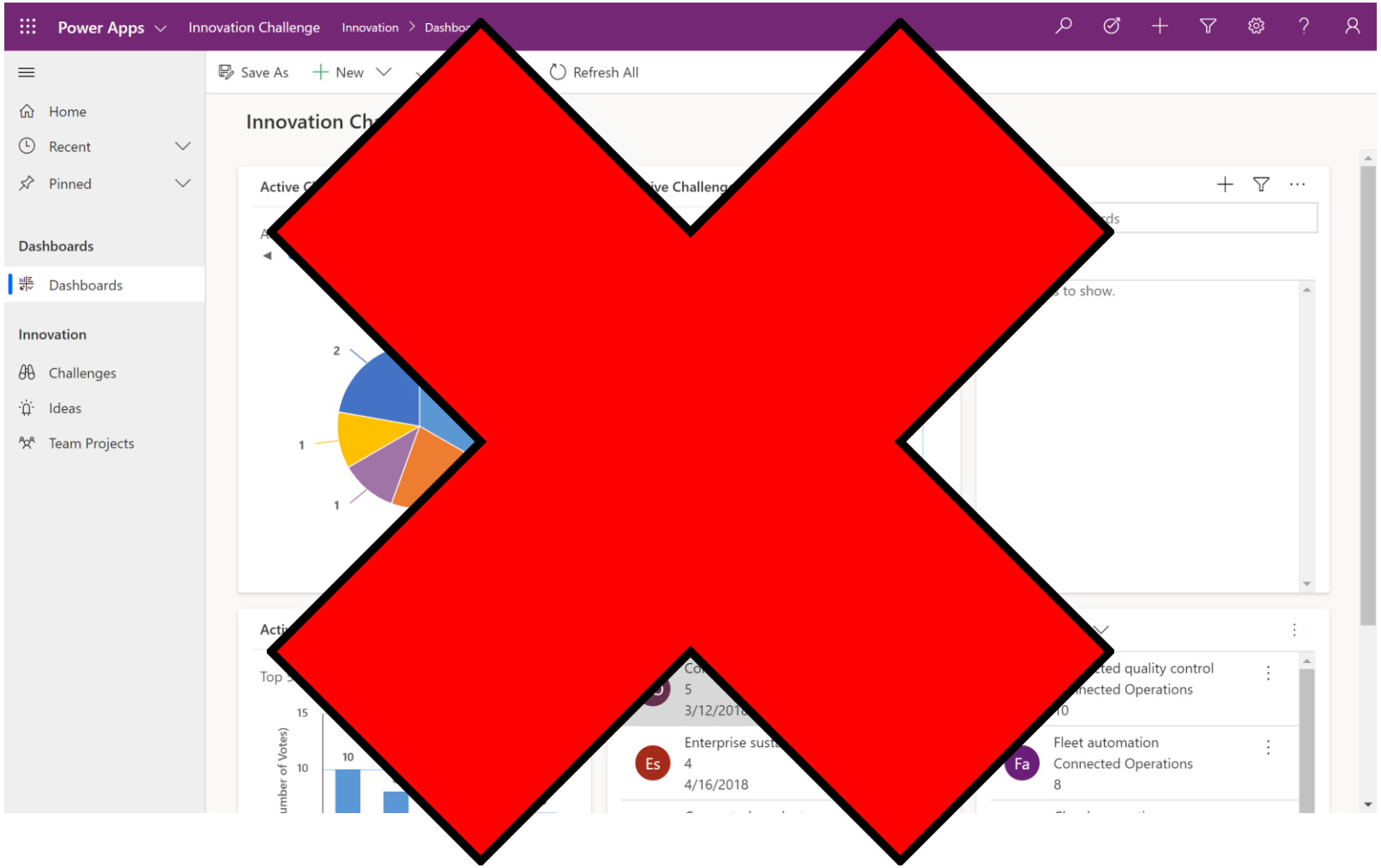
POWER APPS | SOLUTIONS - MICROSOFT FLOW APPROVALS CORE SOLUTION



POWER APPS | SOLUTIONS - MICROSOFT FLOW APPROVALS CORE SOLUTION



CREATE AN APP FOR THAT

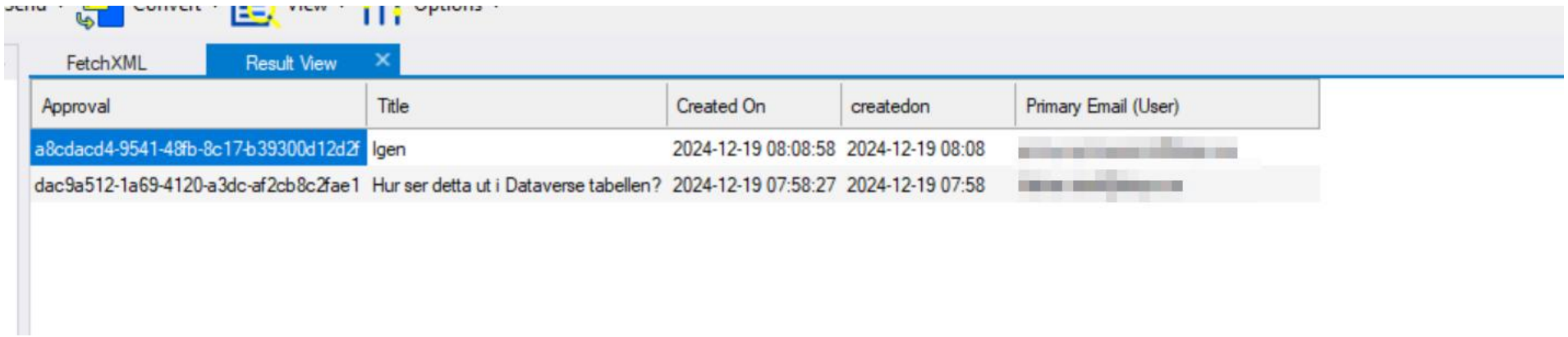


XRMTOOLBOX

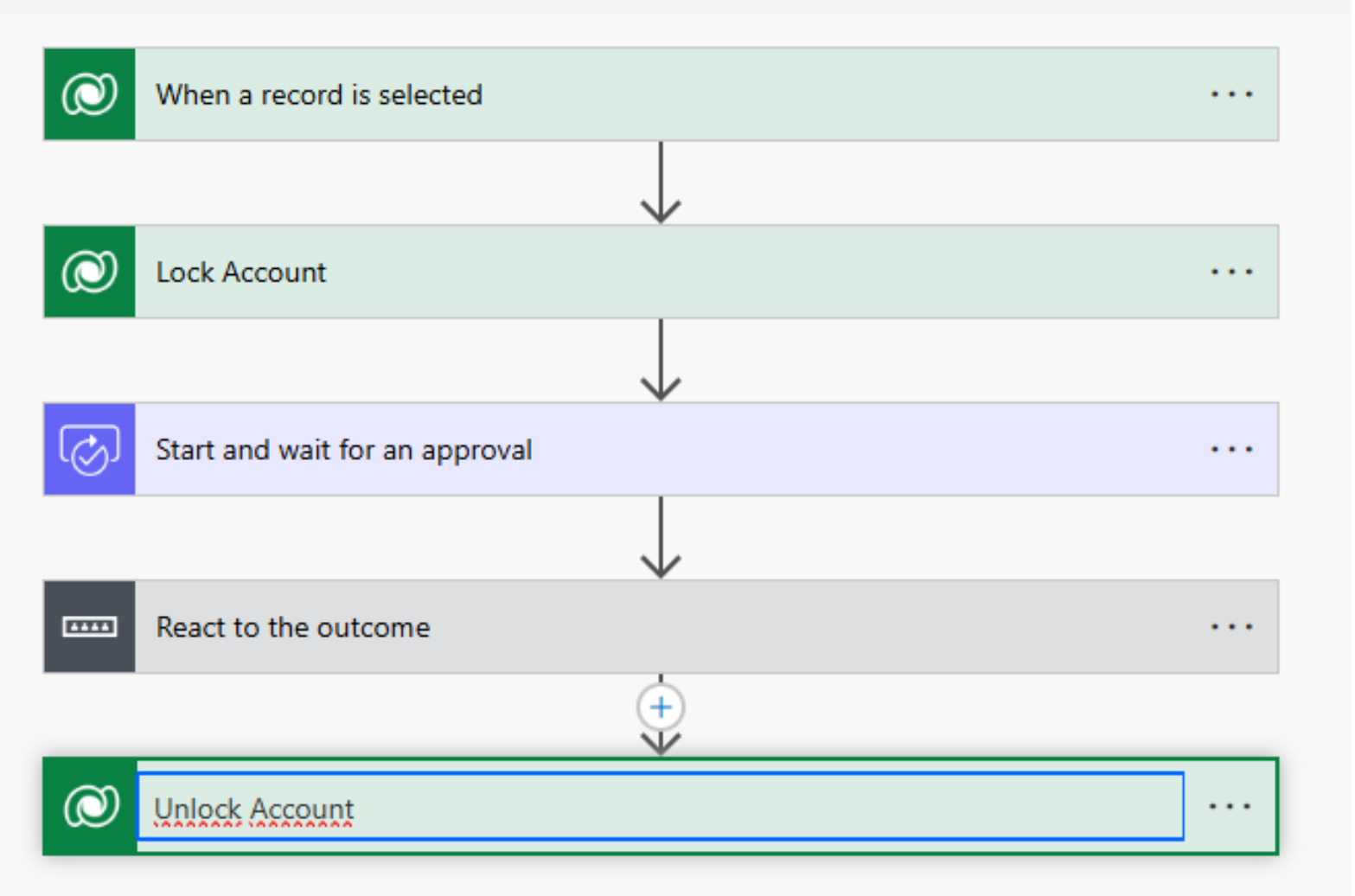
```
<fetch mapping="logical" distinct="true">
  <entity name="msdyn_flow_approval">
    <attribute name="msdyn_flow_approvalid" />
    <attribute name="msdyn_flow_approval_title" />
    <attribute name="createdon" />
    <order attribute="createdon" descending="true" />
    <filter type="and">
      <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.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

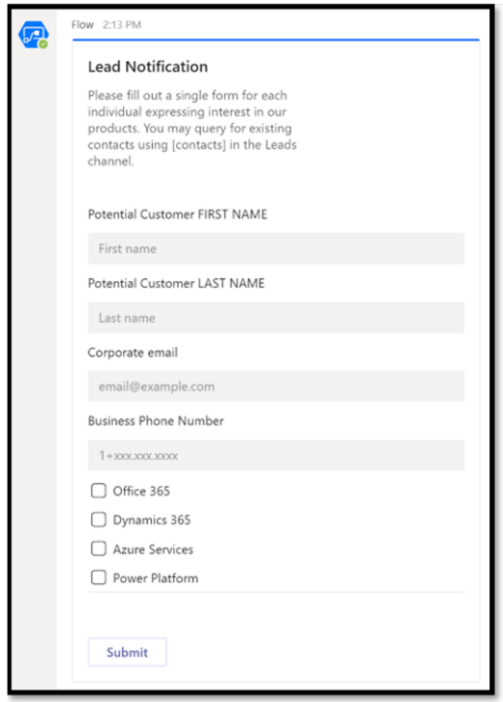
CANCEL RUNS

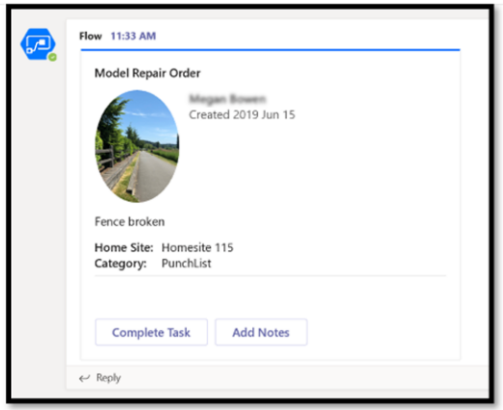

When a record is selected
Lock Account
Start and wait for an approval
React to the outcome
Unlock Account

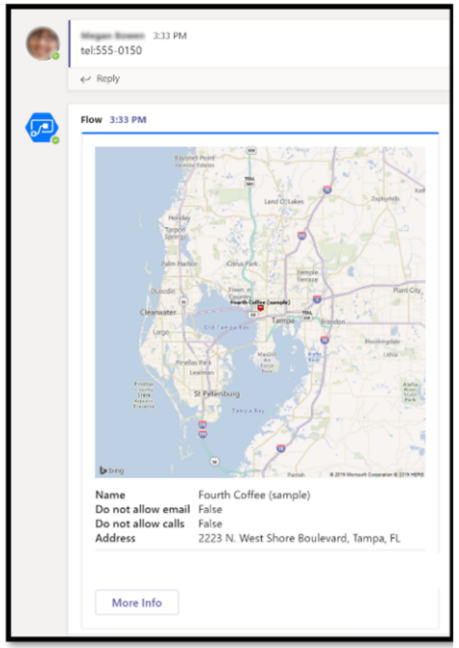
TIPS

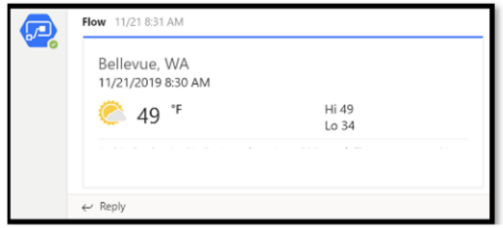
- One Environment
- Short flows
- Re-runs
- Cancel flows
- Overview of outstanding requests
  - For me
  - For everyone

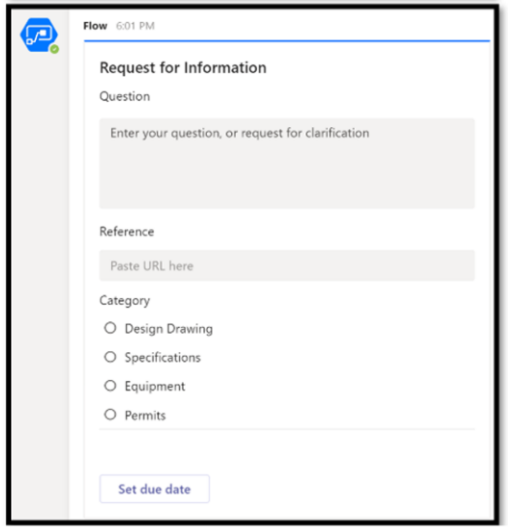
SKIP APPROVALS

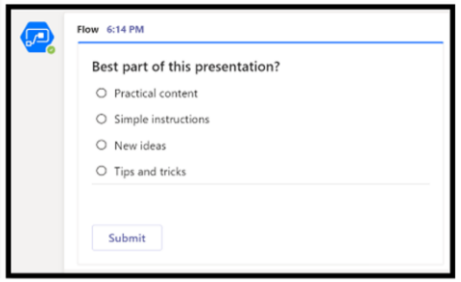


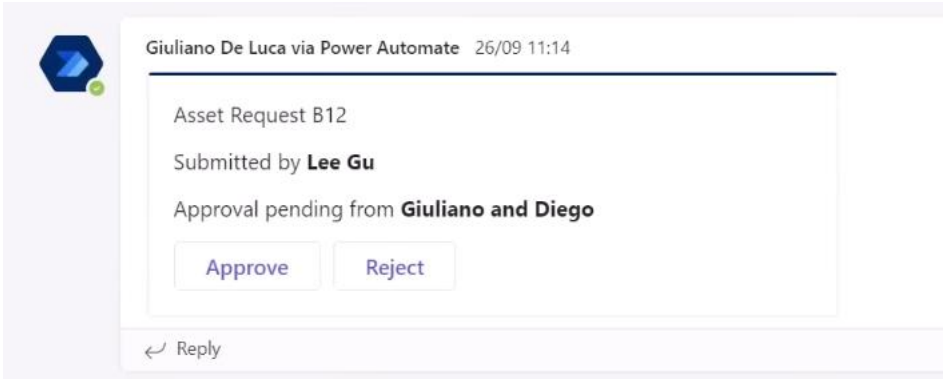




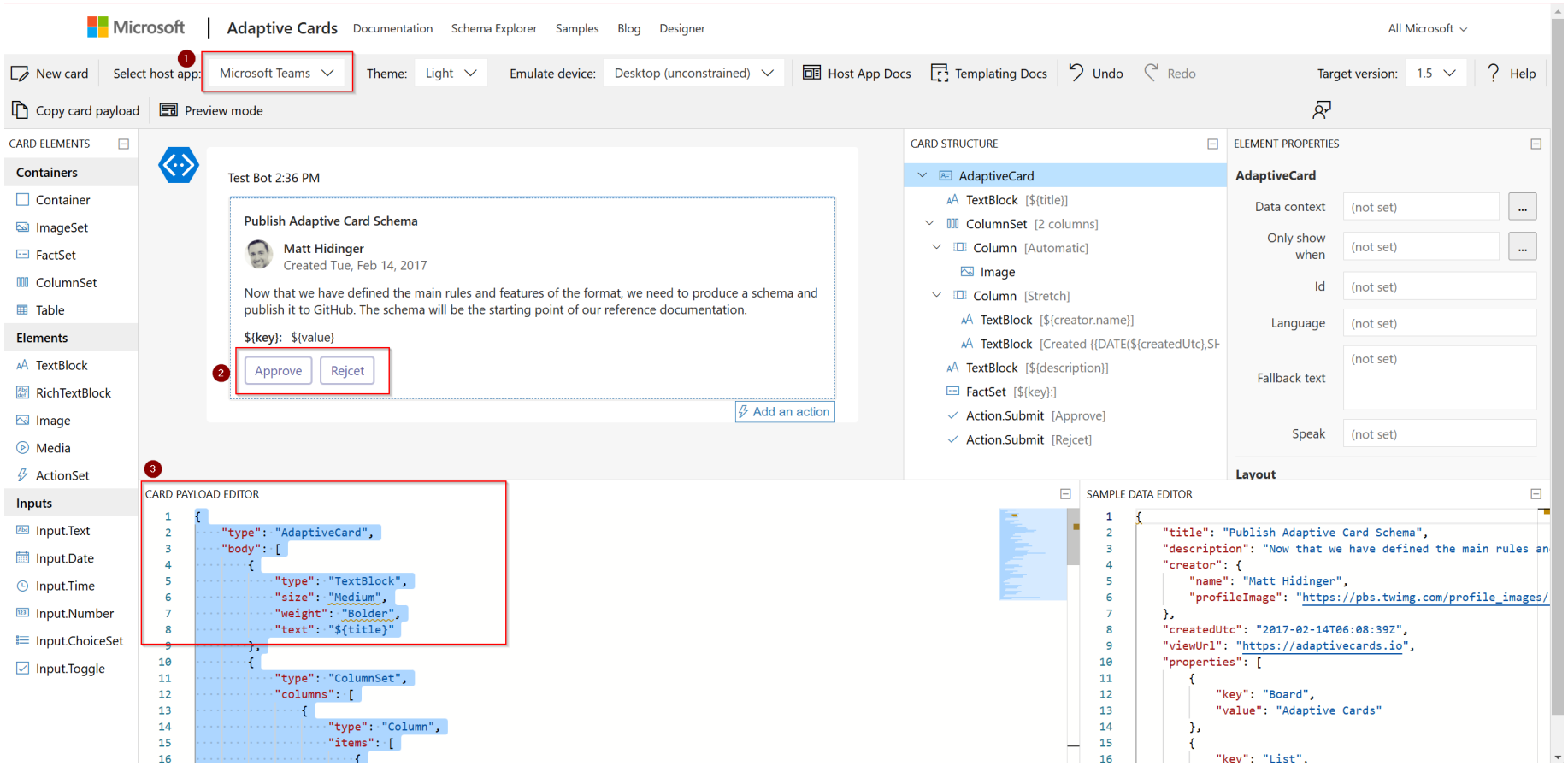




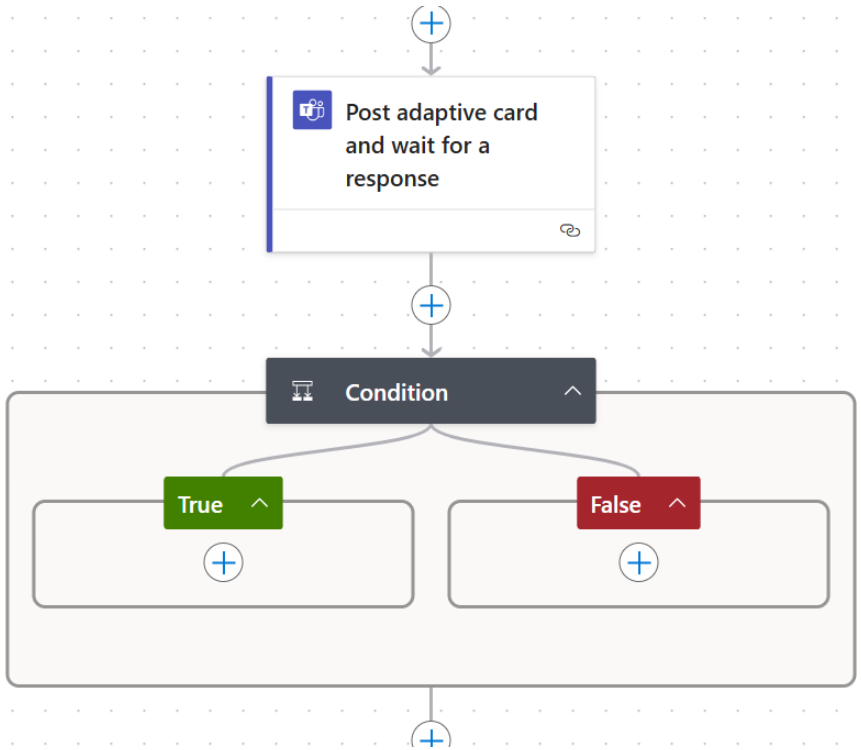


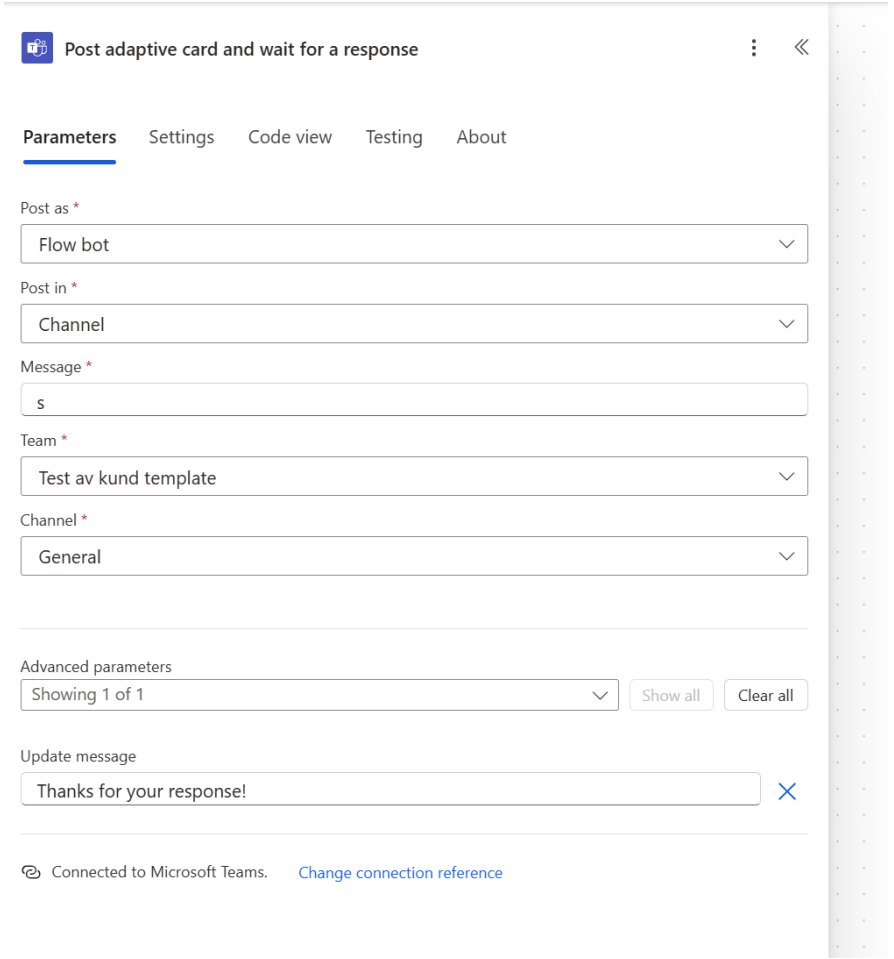


HTTPS://ADAPTIVECARDS.IO/DESIGNER/



SKIP APPROVALS





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

THANK YOU

SOMEONE@EXAMPLE.COM