✓ 100 XP ▶

Exercise - Create an approval request flow

15 minutes

The flow triggers when you add a new item to the **Machine Order** table in Microsoft Dataverse.

- It uses the Approvals Service to send an approval request.

- The approver receives an email with options to approve or reject and to add comments.

- After the approver has responded, the record in the Machine Order table will be updated with the appropriate approval status and comments.

- An email is sent to the requester informing them whether the machine was approved or rejected.

ⓘ **Note**

Two ways to create a flow are from blank or from a template. In this lab, you'll create the approval flow starting with a blank flow.

ⓘ **Note**

This module is designed for use with the App in a Day instructor-led course. For more information on attending this free, instructor-led course, see **Microsoft Power Platform instructor-led training** . On that page, you can **Register for an event** .


ⓘ **Note**

To complete the exercises, you'll need to use a few files. Download the **App in a Day files** for use in this module. The file folders that are in this download include:

- **Completed modules with instructions** - Package files to import the completed exercise steps.
- **Machine-Order-Data.xlsx** - File used in the exercises.

Task - Sign in to the Power Apps website and create a flow

Your first task is to sign in to the Microsoft Power Apps website and then create a flow.

1. Go to Make Power Apps   and make sure that you're in the correct environment.
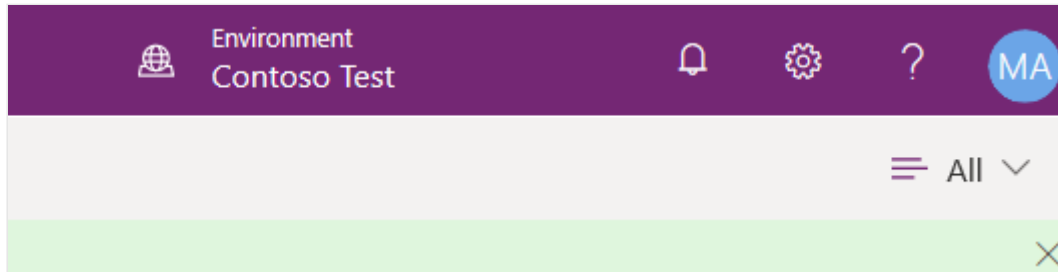
2. Select **Solutions** and then select to open the **Contoso Coffee** solution.

3. Select **New** and then select **Automation > Cloud flow > Automated**.
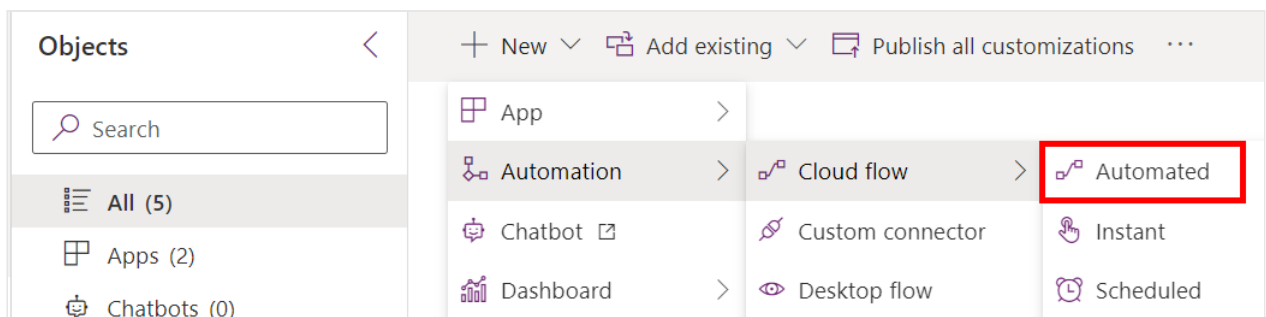
Task - Set up the trigger

Next, you need to set up the trigger, that is, when the flow should run. You can trigger a flow in the following ways:

- Manually, from a Power Apps application

- Manually, from a flow button

- On a fixed schedule

- When an event occurs, such as a new item being added to a table, a new email arriving in a user's inbox, or a new tweet being posted on Twitter that meets certain conditions

In this scenario, you set the flow to trigger when a new item is added to the **Machine Order** table in Microsoft Dataverse.

1. In the **Flow name** box, enter a name for your flow, such as **New machine approval request**.

2. In the **Choose your flow's trigger** box, search for **when a row is added** and then select **When a row is added, modified, or deleted**.

3. Select **Create**.

4. Select **Added** from the **Change type** dropdown menu.
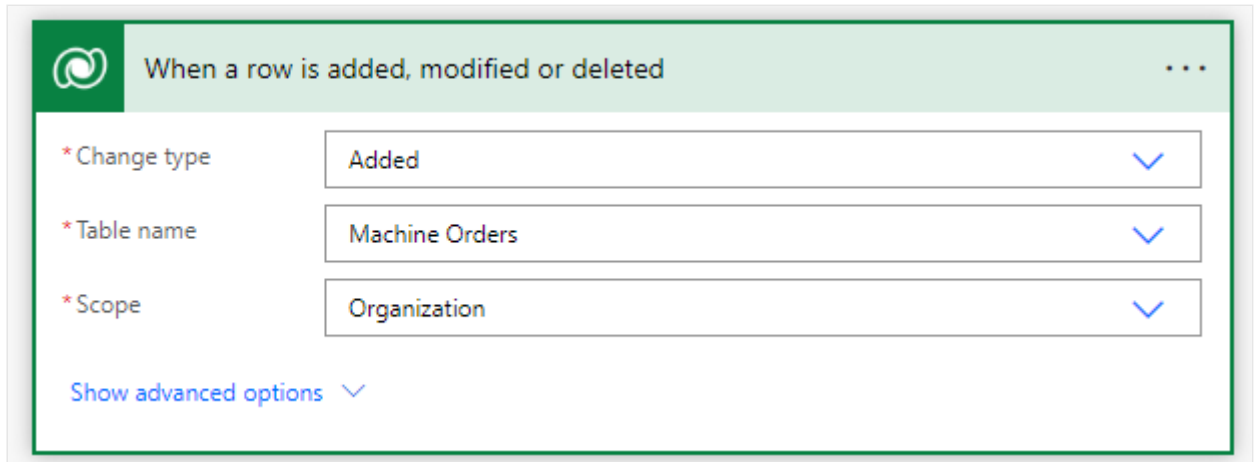
5. From the **Table Name** dropdown menu, select **Machine Orders**. You can type **machine orders** to search for it.

6. From the **Scope** dropdown menu, select **Organization**. Scope allows you to limit when your flow runs. For example, if you choose **User**, the flow would only run for orders that you create. In this case, you're choosing **Organization** because you want this flow to run for records that have been created by anyone in your entire organization.
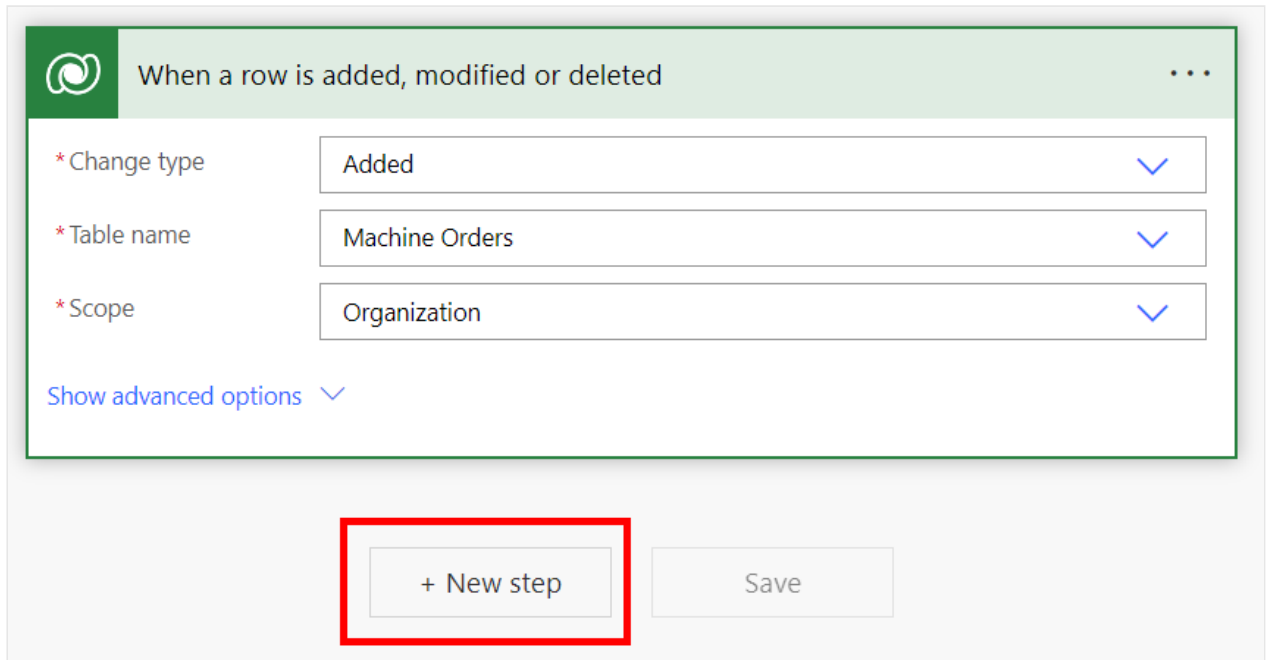
Task - Add an action to send an approval request

In this next task, you'll add an action to send an approval request.

1. Select **New step**.

2. Search for **Approvals** and then select **Start and wait for an approval**.
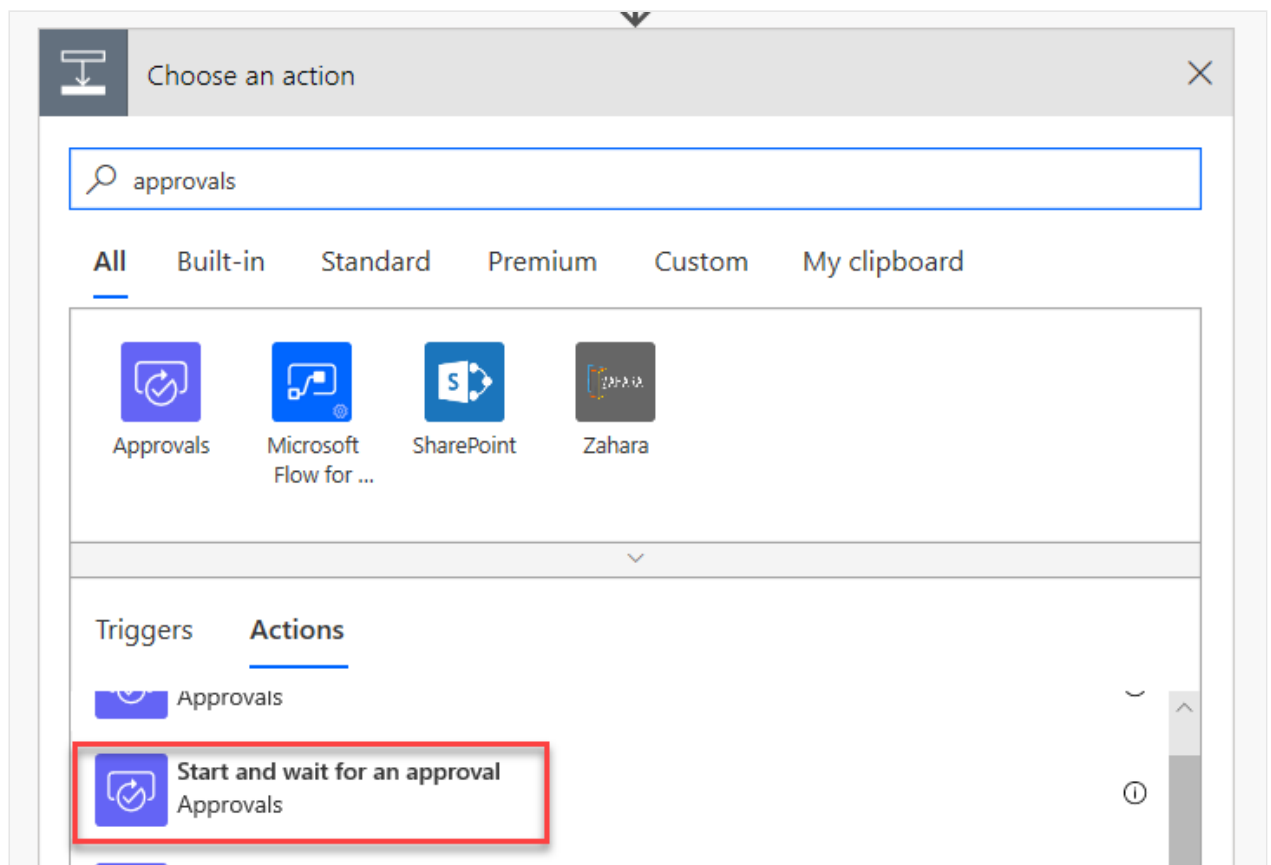
The system uses the approval service. For more information, see Get started with approvals.

3. In the **Approval type** dropdown menu, select **Approve/Reject - First to respond**.
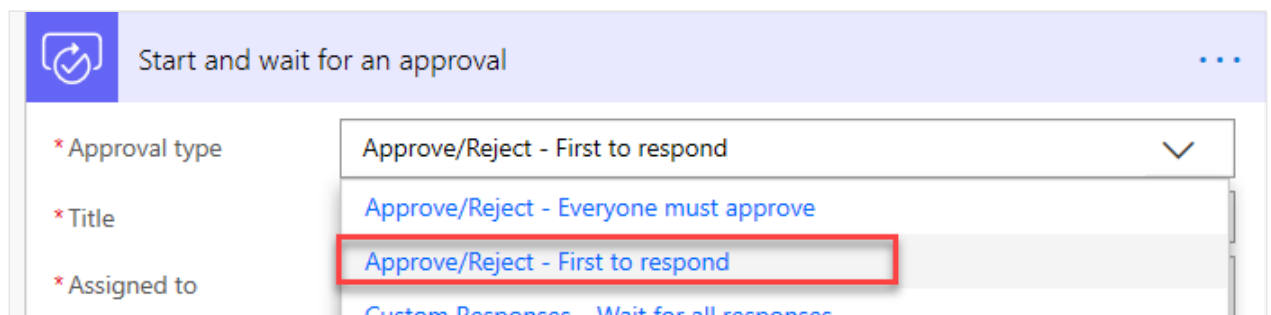
4. In the **Title** field, add some text and one piece of dynamic content. This dynamic content contains the Machine Name of the machine order request. Enter **New machine request for** in the **Title** text box.
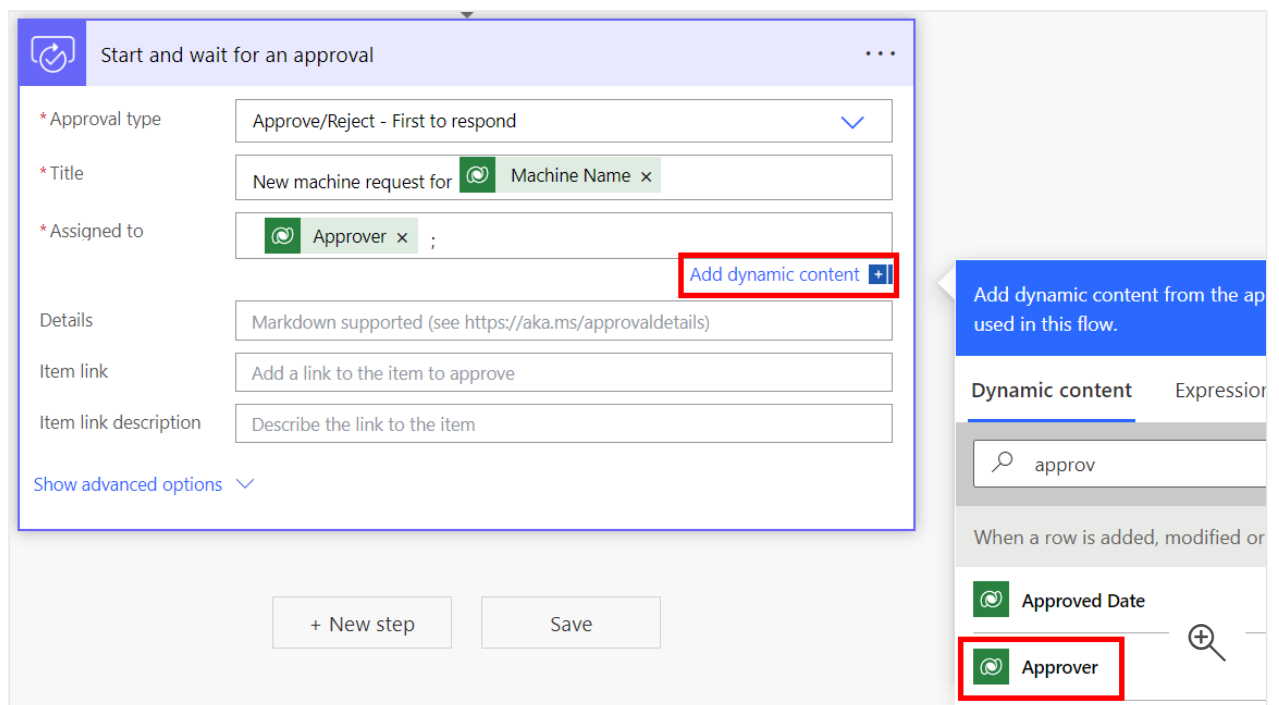
5. Select **Machine Name** for the **Dynamic content**.
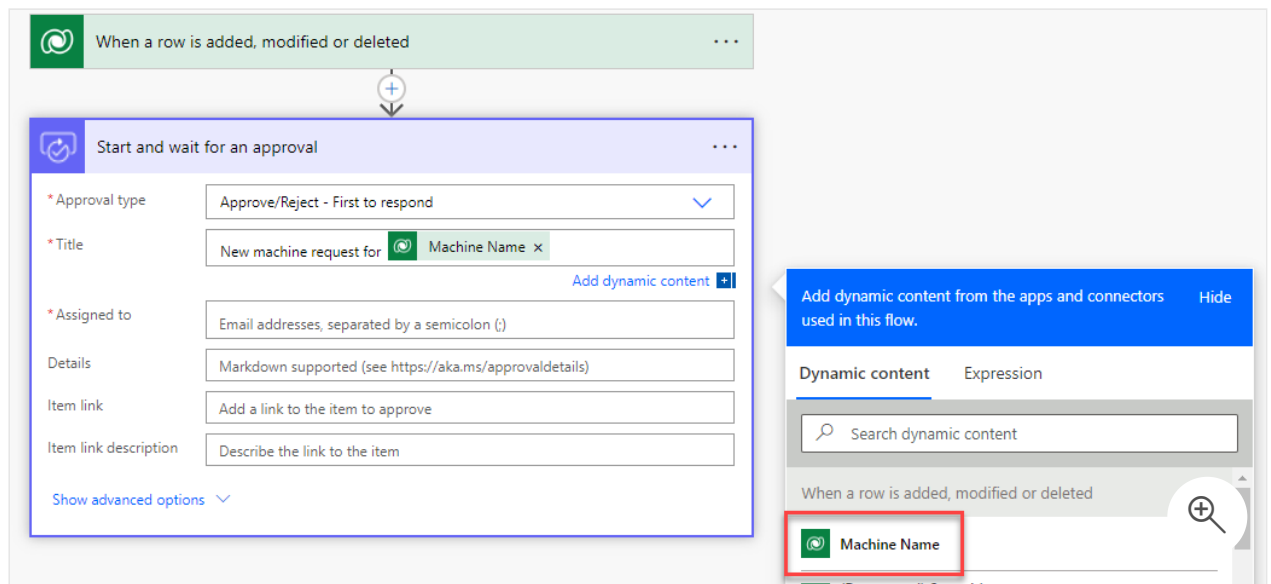
6. Select the **Assigned to** field and then select **Approver**. Select the **Add dynamic content** button to show/hide the **Dynamic content** pane.
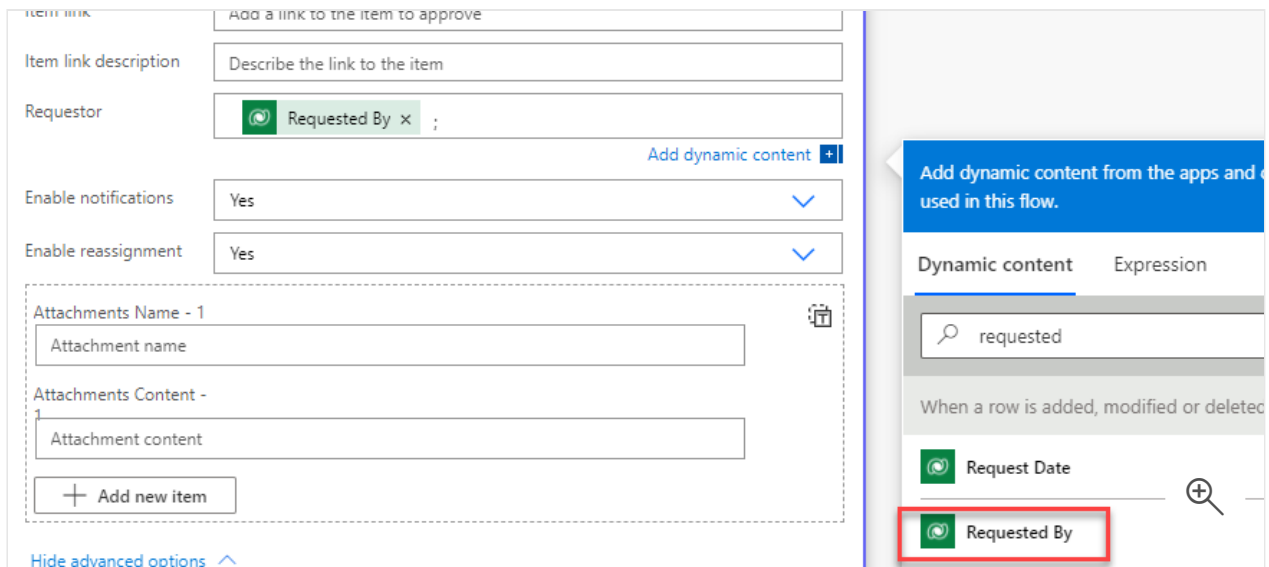
7. Select **Show advanced options**.

8. Select the **Requestor** field and then select **Requested By**.

9. In the **Details** field, enter **A new machine has been requested** and then press the **Enter** key.

10. Select **Machine Name** from the **Dynamic content** pane.

11. Type **,** **$** and then select **Price.** You might need to select the **See More** option under the dynamic content search bar to find the **Price** option.

12. Press the **Enter** key and then type **Department Contribution: $**.

13. Select **Department Contribution**.

14. Press the **Enter** key, and then type and select **Comments**.

Your flow will now resemble the following image.

15. **Save** your flow.

> ⓘ **Note**
>
> When creating your own approval flows, you might also include a clickable link that will be displayed in the approval email. In this scenario, you could include a link to view machine details in an online catalogue. You would include the **Item link** and **Item link description**.
>
> You could also set the **Item link** to deep link into a Power Apps application to view more details about the request. In this scenario, you might pass an OrderID or a MachineID as a URL parameter. Power Apps accepts URL parameters.

Next unit: Exercise - Create conditional logic

Continue >