

✓ 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

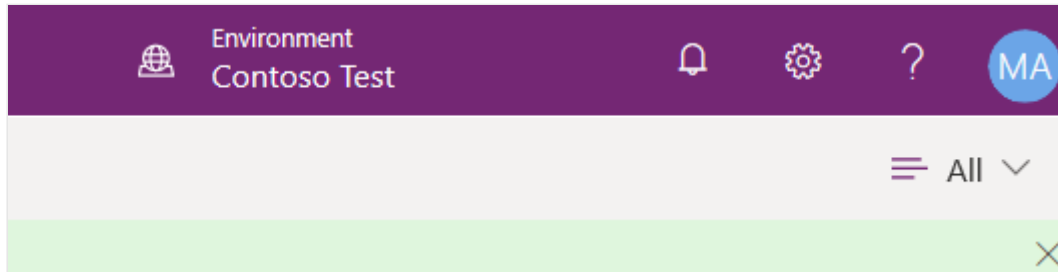
To complete the exercises, you'll need to use a few files. Download the [App in a Day files](#) for use in this module. The file folders that are in this download include:

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

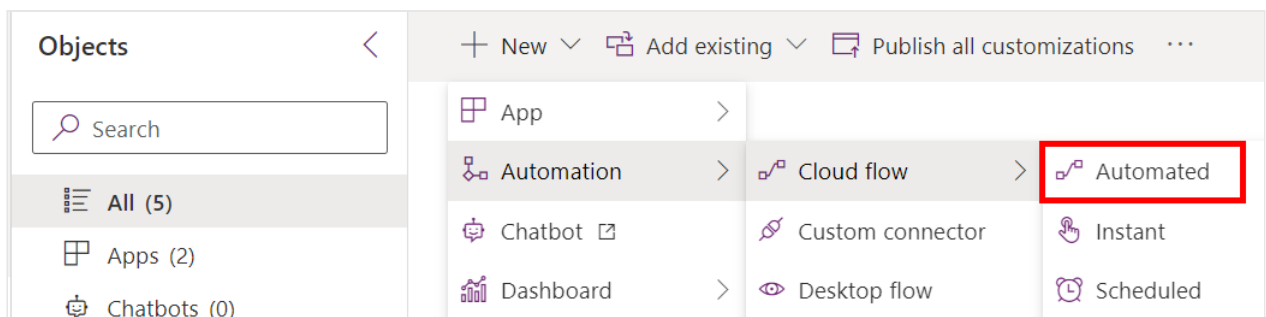
Task - Sign in to the Power Apps website and create a flow

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**.

Build an automated cloud flow

Flow name
New machine approval request

Choose your flow's trigger * ⓘ
Search or select a trigger from the list below to create a flow. (Required)

when a row

- ☒ When a row is added, modified or d... Microsoft Dataverse ⓘ
- ☐ When a new section is created OneNote (Business) ⓘ
- ☐ When status of a goal changes Power BI ⓘ
- ☐ When a build completes Azure DevOps ⓘ
- ☐ When an item is deleted SharePoint ⓘ

Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

Skip Create Cancell

3. Select **Create**.

4. Select **Added** from the **Change type** dropdown menu.

When a row is added, modified or deleted

* Change type

Choose when the flow triggers

Added

Added or Deleted

Added or Modified

Added or Modified or Deleted

Deleted

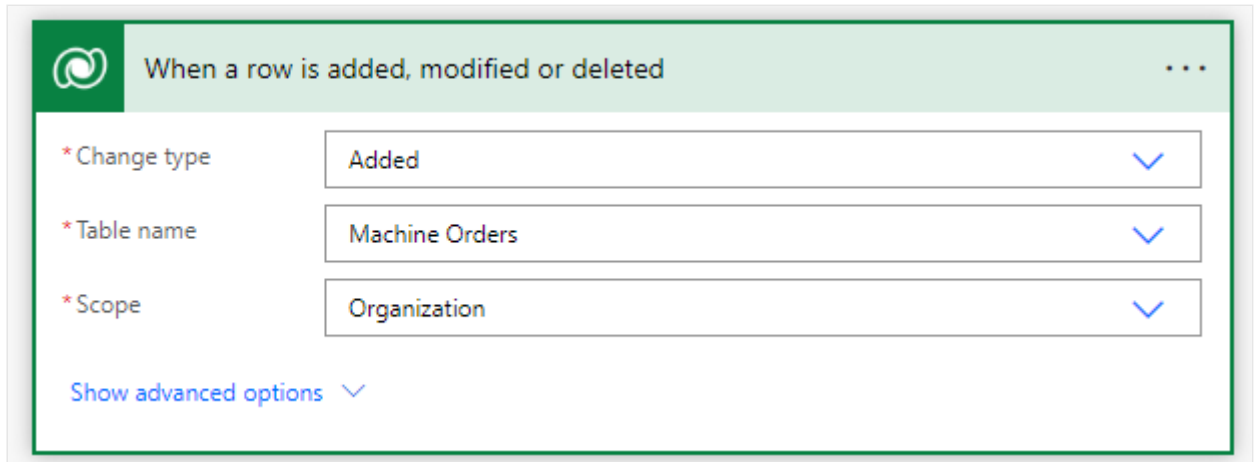
Modified

Modified or Deleted

Enter custom value

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.



The screenshot shows a configuration panel for a trigger. At the top, there is a green header with a circular logo and the text "When a row is added, modified or deleted". Below the header, there are three rows of configuration options, each with a red asterisk label and a dropdown menu:

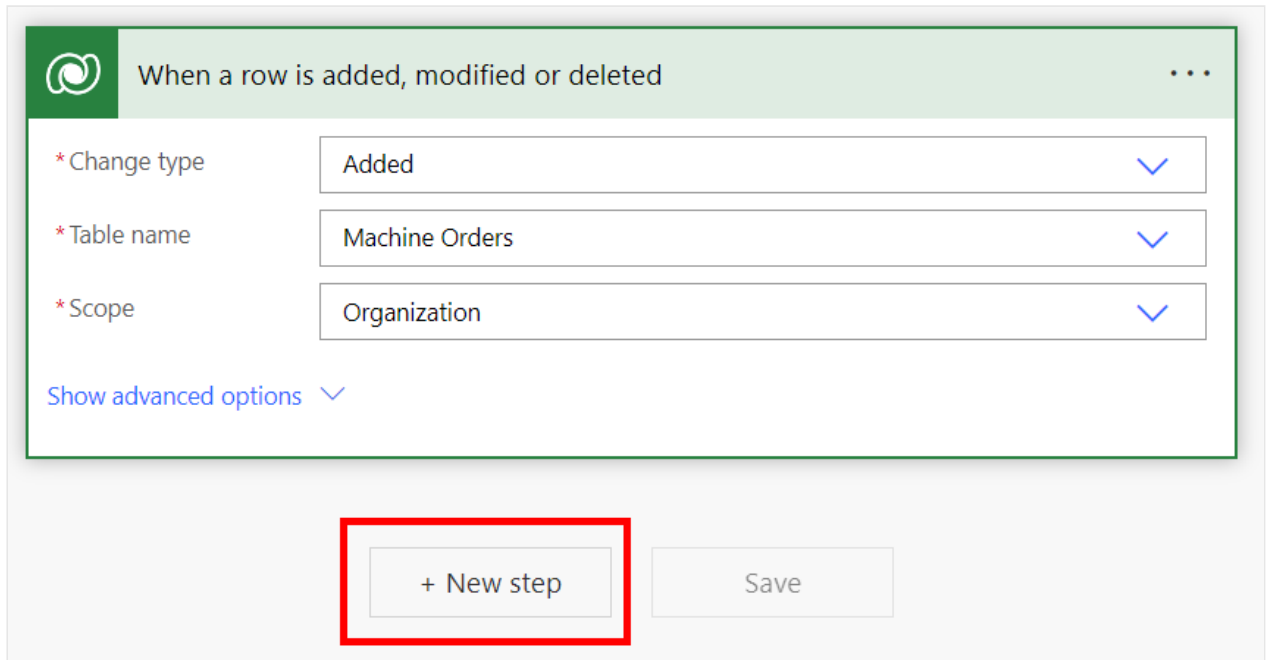
- * Change type: Added
- * Table name: Machine Orders
- * Scope: Organization

At the bottom of the panel, there is a link "Show advanced options" with a downward arrow.

Task - Add an action to send an approval request

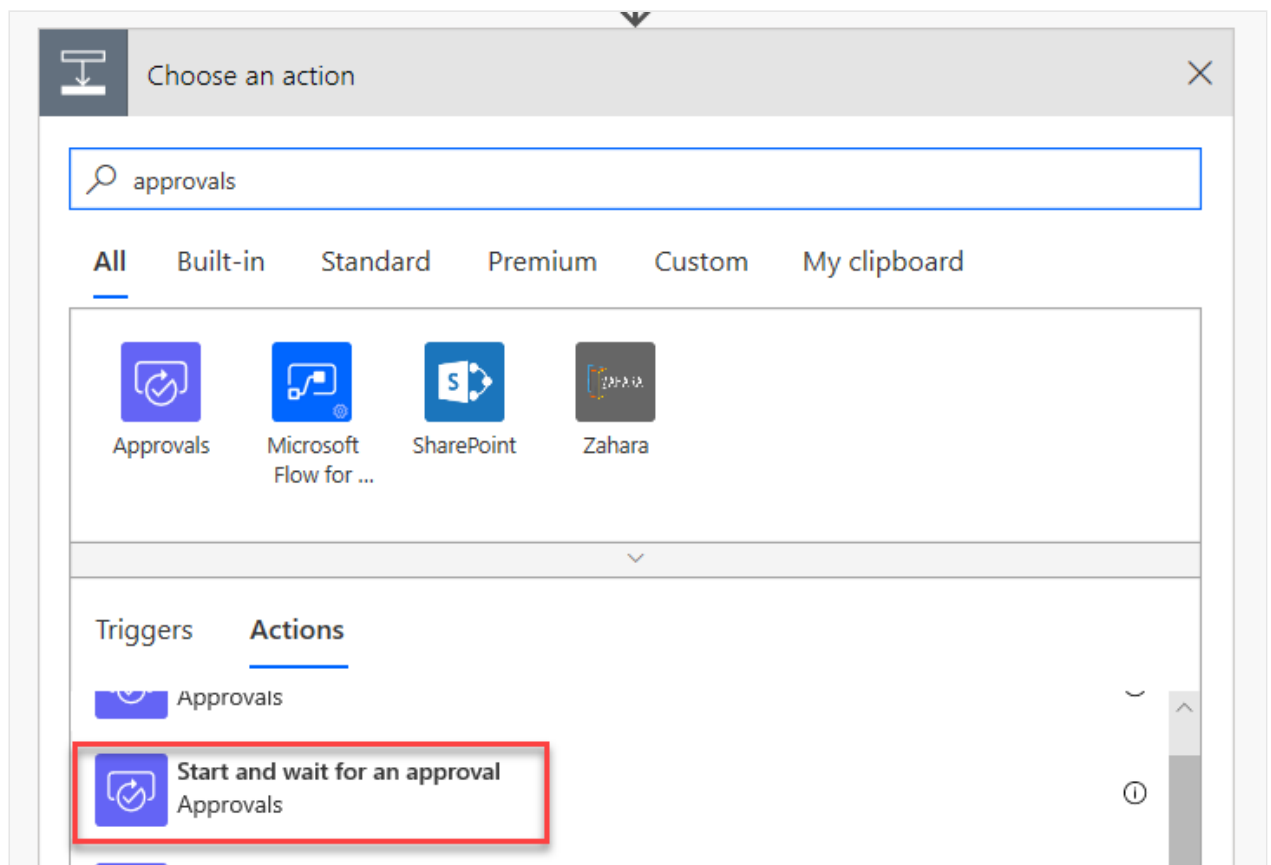
In this next task, you'll add an action to send an approval request.

1. Select **New step**.



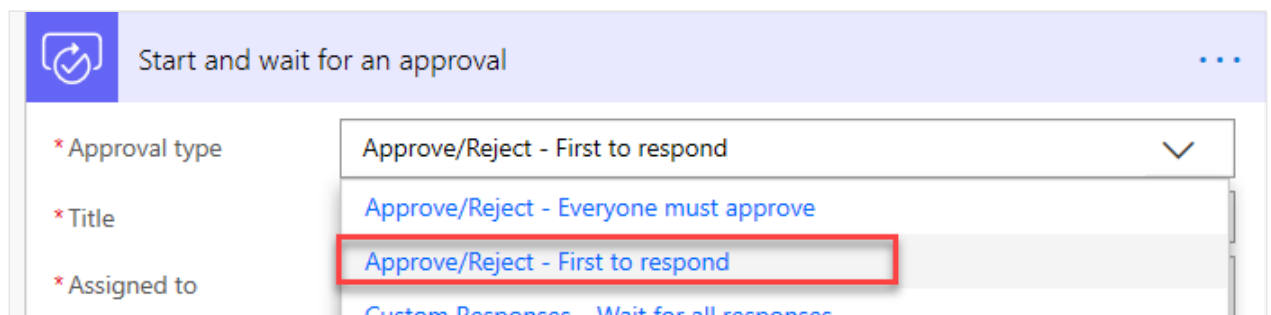
This screenshot shows the same trigger configuration panel as above, but with an additional button at the bottom. The button is labeled "+ New step" and is highlighted with a red rectangular border. To the right of this button is a "Save" button. The configuration panel itself remains the same, with the trigger set to "When a row is added, modified or deleted", "Machine Orders", and "Organization".

2. Search for **Approvals** and then select **Start and wait for an approval**.

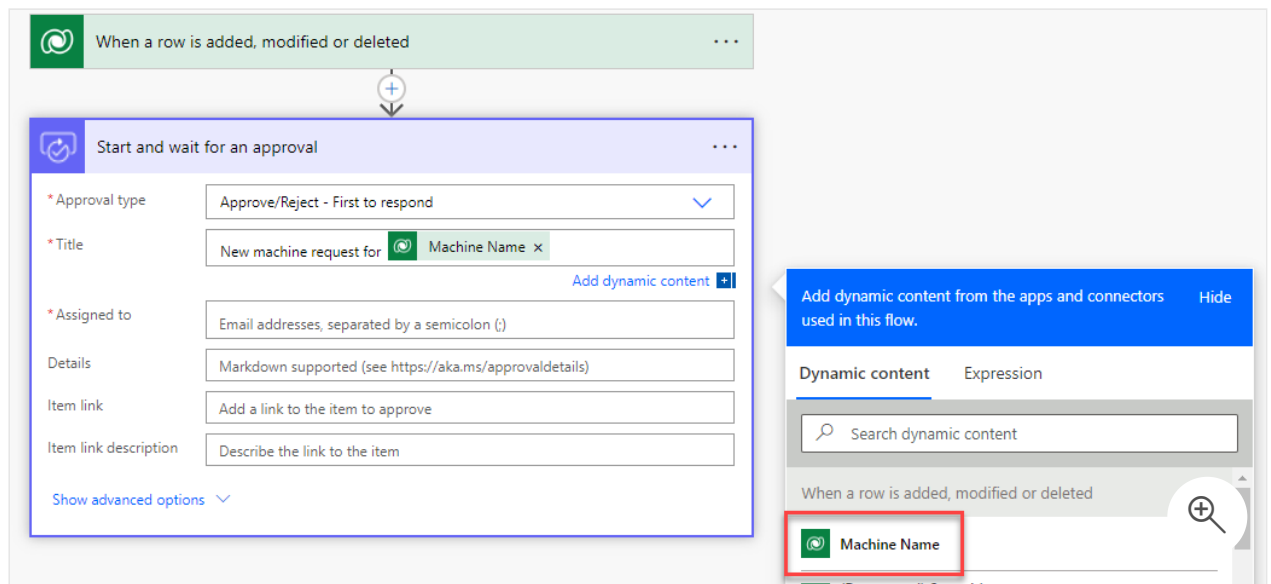


The system uses the approval service. For more information, see [Get started with approvals](#).

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**.

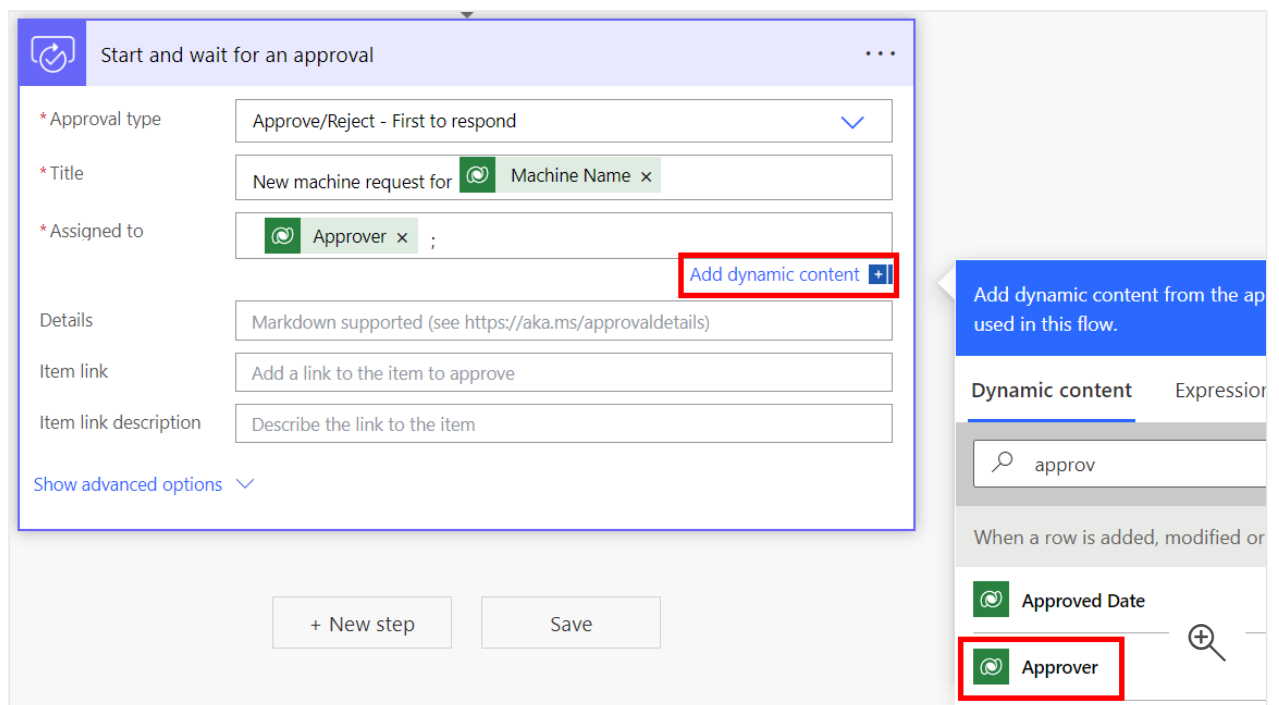


ⓘ Note

If the **Dynamic content** box is not visible, select the **Add dynamic content** button.

Add dynamic content +

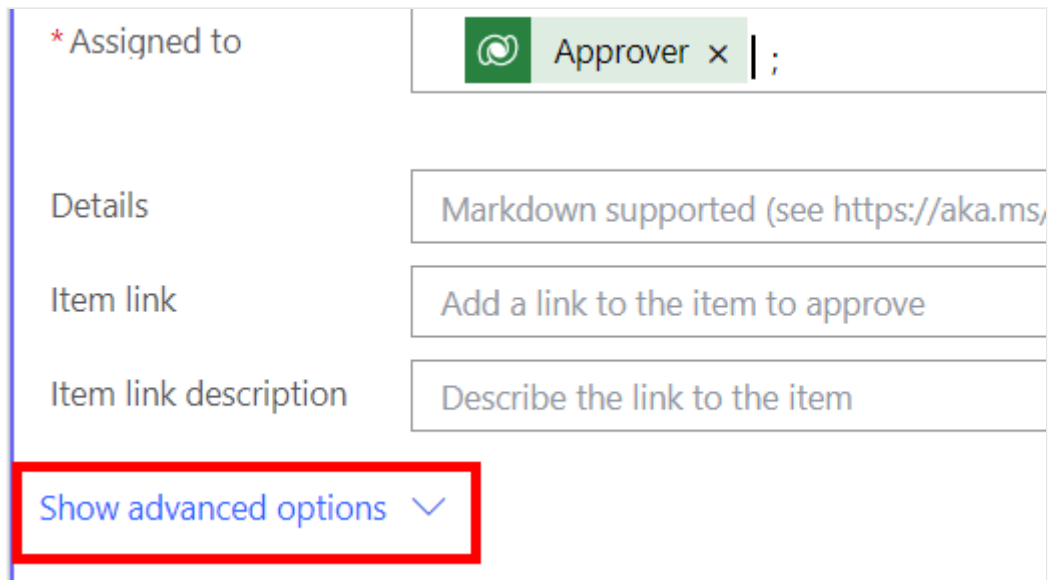
6. Select the **Assigned to** field and then select **Approver**. Select the **Add dynamic content** button to show/hide the **Dynamic content** pane.



ⓘ Note

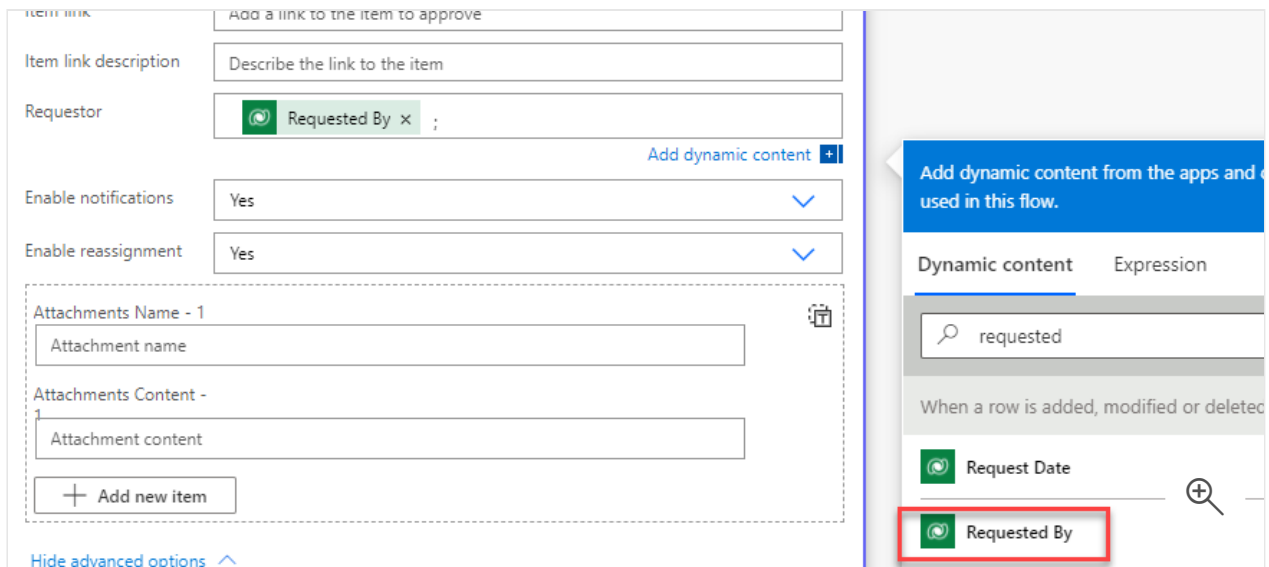
Recall from the previous lab that this address is the approver's email address.

7. Select **Show advanced options**.



The screenshot shows a form with several fields. The 'Assigned to' field is at the top, followed by 'Details', 'Item link', and 'Item link description'. At the bottom, the 'Show advanced options' link is highlighted with a red rectangle. The 'Assigned to' field contains a green icon and the text 'Approver x | ;'. The 'Details' field contains the text 'Markdown supported (see https://aka.ms/...)'. The 'Item link' field contains the text 'Add a link to the item to approve'. The 'Item link description' field contains the text 'Describe the link to the item'.

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



The screenshot shows the 'Requestor' field in the form, which contains a green icon and the text 'Requested By x | ;'. To the right of the form is a 'Dynamic content' pane. The pane has a search bar with the text 'requested'. Below the search bar, there is a list of dynamic content items. The 'Requested By' item is highlighted with a red rectangle. The 'Request Date' item is also visible in the list.

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.

* Assigned to: Approver x ;

Details: A new machine has been requested
Machine Name x

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Requestor: Requested By x ;

Enable notifications: Yes

Enable reassignment: Yes

Attachments Name - 1: Attachment name

Add dynamic content +

Add dynamic content from the apps and connectors used in this flow. Hide

Dynamic content Expression

Search dynamic content

When a row is added, modified or deleted

Machine Name

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.

Details: A new machine has been requested
Machine Name x , \$ Price x

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Requestor: Requested By x ;

Enable notifications: Yes

Enable reassignment: Yes

Attachments Name - 1: Attachment name

Attachments Content -

Add dynamic content +

Add dynamic content from the apps and connectors used in this flow. Hide

Dynamic content Expression

Search price

When a row is added, modified or deleted

Process Id
Contains the id of the process associated with the

Price
Machine Price

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

13. Select **Department Contribution**.

Details: A new machine has been requested
Machine Name x , \$ Price x
Department Contribution: \$ Department C... x

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

Requestor: Requested By x ;

Enable notifications: Yes

Enable reassignment: Yes

Attachments Name - 1: Attachment name

Attachments Content -

Add dynamic content +

Add dynamic content from the apps and connectors used in this flow. Hide

Dynamic content Expression

Search depa

When a row is added, modified or deleted

Department Contribution

Department Contribution (Base)

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

Details

A new machine has been requested

Machine Name x, Price x

Department Contribution: \$ Department C... x

Comments: Comments x

Add dynamic content +

Item link

Add a link to the item to approve

Item link description

Describe the link to the item

Requestor

Requested By x ;

Enable notifications

Yes

Enable reassignment

Yes

Attachments Name - 1

Attachment name

Add dynamic content from the apps and connectors used in this flow.

Dynamic content

Expression

comm

When a row is added, modified or deleted

(Deprecated) Traversed Path

A comma separated list of string values repre

Comments

Your flow will now resemble the following image.

When a row is added, modified or deleted

* Change type

Added

* Table name

Machine Orders

* Scope

Organization

Show advanced options

+

Start and wait for an approval

* Approval type

Approve/Reject - First to respond

* Title

New machine request for Machine Name x

* Assigned to

Approver x ;

Details

A new machine has been requested

Machine Name x, Price x

Department Contribution: \$ Department C... x

Comments: Comments x

Item link

Add a link to the item to approve

Item link description

Describe the link to the item

Requestor

Requested By x ;

Enable notifications

Yes

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 >
