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Manage sequential approvals with Power Automate

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Some workflows require pre-approval before the final approver is required to sign off. For example, a company may have a sequential approval policy that requires pre-approval for invoices over \$1000.00 before they're approved by the Finance department.

In this walkthrough, we create a sequential approval flow that manages employee vacation requests.

Note

SharePoint is used here only as an example; it is not required to create approval flows. You can use any of the more than 200 services with which Power Automate integrates to drive your flows.

Detailed steps in the flow

The flow:

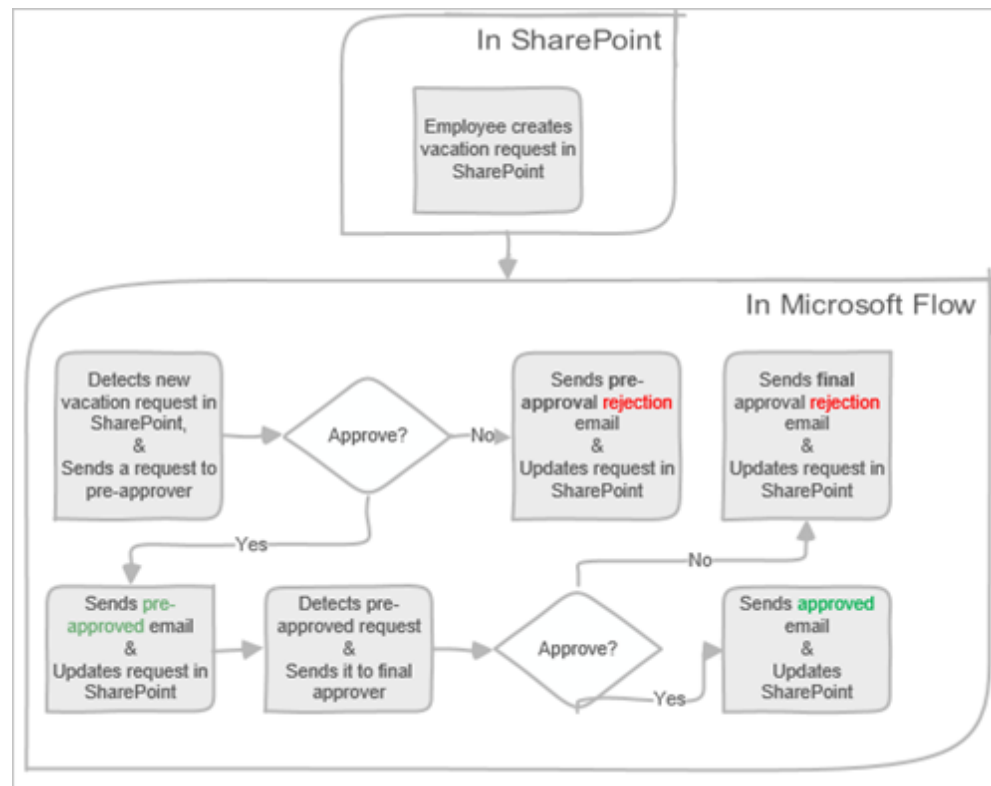
1. Starts when an employee creates vacation request in a [SharePoint Online list](#).

2. Adds the vacation request to the approval center and then emails the request to the pre-approver.
3. Emails the pre-approval decision to the employee.
4. Updates the SharePoint Online list with the pre-approver's decision and comments.

Note: If the request is pre-approved, the flow continues with these steps:

5. Sends the request to the final approver.
6. Emails the final decision to the employee.
7. Updates the SharePoint list with the final decision.

This image summarizes the preceding steps:



Prerequisites

- [Power Automate](#).
- A SharePoint Online list.
- Office 365 Outlook and Office 365 Users account.

ⓘ Note

While we use SharePoint Online and Office 365 Outlook in this walk-through, you can use other services such as Zendesk, Salesforce, or Gmail.

Before you create the flow, create a [SharePoint Online list](#); later, we'll use this list to request approval for vacations.

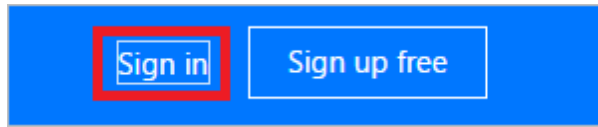
For the purposes of this walkthrough, the SharePoint Online list that you create must include the following columns:

Columns		
A column stores information about each item in the list. The following columns are currently available in this list:		
Column (click to edit)	Type	Required
Title	Single line of text	✓
Modified	Date and Time	
Created	Date and Time	
Start date	Date and Time	✓
End date	Date and Time	✓
Comments	Single line of text	
Approved	Yes/No	
Manager Comments	Single line of text	
Modified	Date and Time	
Created	Date and Time	
Pre-approved	Yes/No	
Created By	Person or Group	
Modified By	Person or Group	

Make note of the name and URL of the SharePoint Online list. We use these items later when you configure the **SharePoint - When a new item is created** trigger.

Create your flow from the blank template

1. Sign in to [Power Automate](#).



2. Select the **My flows** tab.



3. Select **Create from blank**.



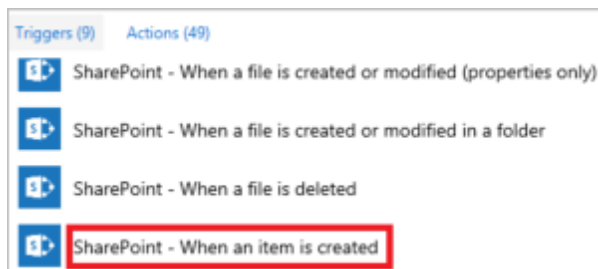
4. Select the **Create from blank** button.

Add a trigger

1. Enter **SharePoint** into the search box.



2. Find, and then select the **SharePoint - When an item is created** trigger.



3. Select the **Site Address** and the **List Name** for the SharePoint list that your flow monitors for new items.

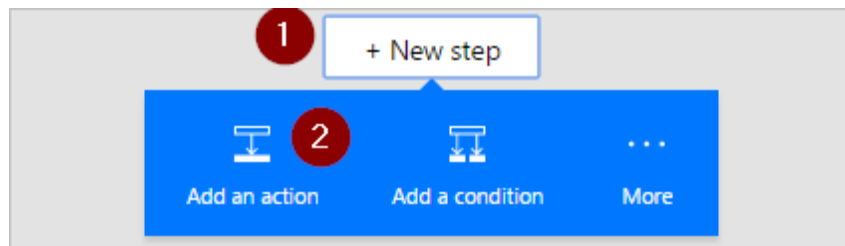
When a new item is created

* Site Address:

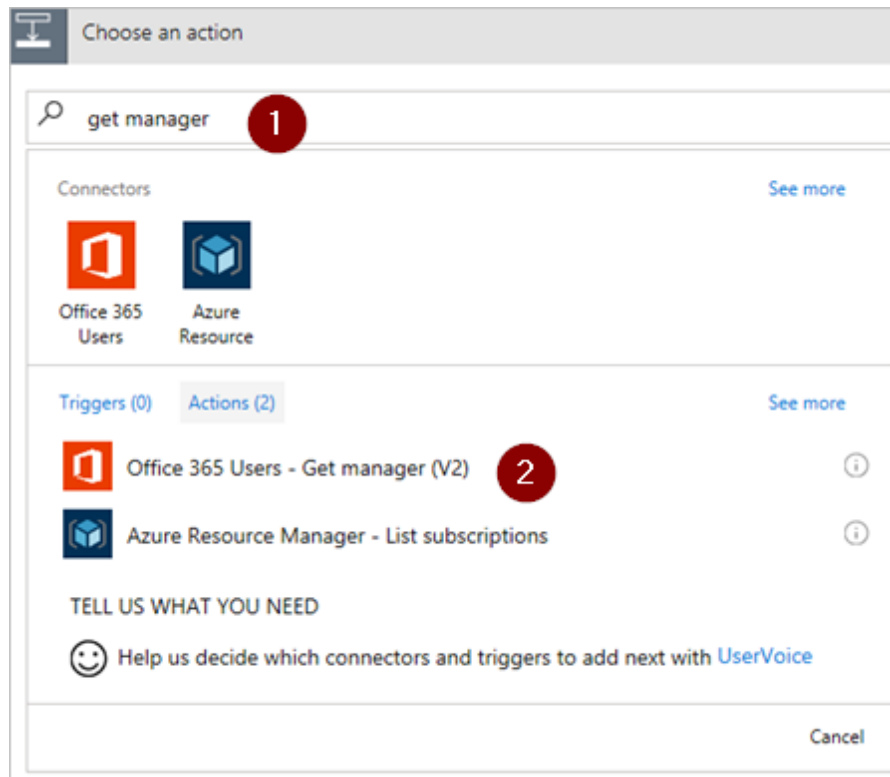
* List Name:

Get the manager for the person who created the vacation request

1. Select **New step**, and then select **Add an action**.

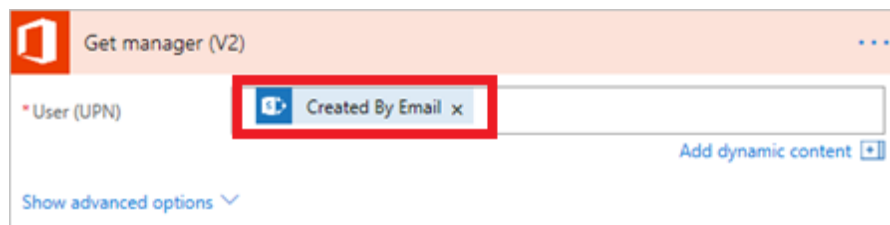


2. Enter **get manager** into the **Choose an action** search box.
3. Find, and then select the **Office 365 Users - Get manager (V2)** action.

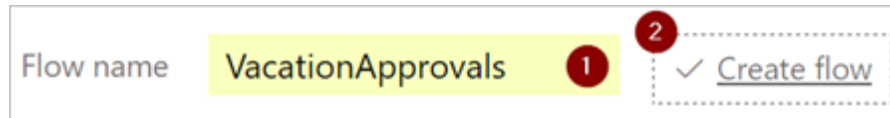


4. Insert the **Created By Email** token into the **User (UPN)** box on the **Get manager** card.

This action gets the manager for the person who created the vacation request in SharePoint.



1. Provide a name for your flow, and then select **Create flow** to save the work we've done so far.



ⓘ **Note**

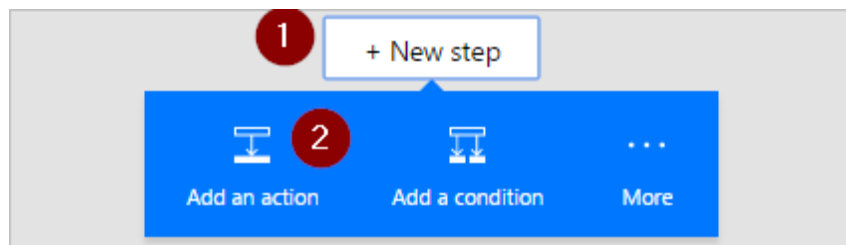
Select **Update flow** from the top of the screen periodically to save the changes to your flow.



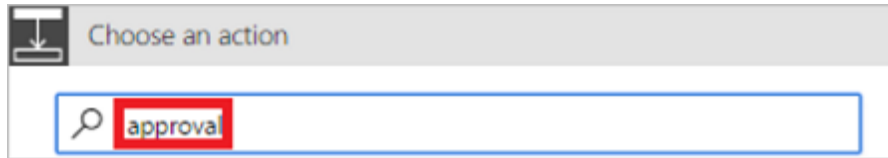
After each save operation, select **Edit flow** from the top of the screen, and then continue making changes.

Add an approval action for pre-approvals

1. Select **New step**, and then select **Add an action**.



2. Enter **approval** into the **Choose an action** search box.



3. Select the **Approvals - Start an approval** action.



4. Configure the **Start an approval** card to suit your needs.

ⓘ Note

The **Title** and **Assigned To** fields are required. You can use [Markdown](#) to format the **Details** field.

Start an approval

* Approval type: Everyone from the assigned list

* Title: Vacation request for: Created By Dis...

* Assigned to: Mail ;

Details: Created By Dis... wants to go on vacation from
Vacation start... to Vacation end d...
Comments from Created By Dis... ; Employee com...

Item link: Add a link to the item to approve

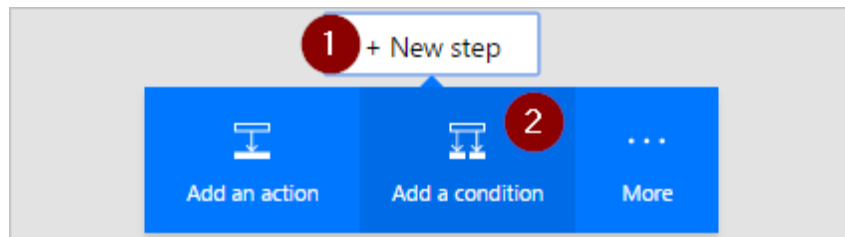
Item link description: Describe the link to the item

Add dynamic content

Note: This action sends the pre-approval request to the email address in the **Assigned To** box.

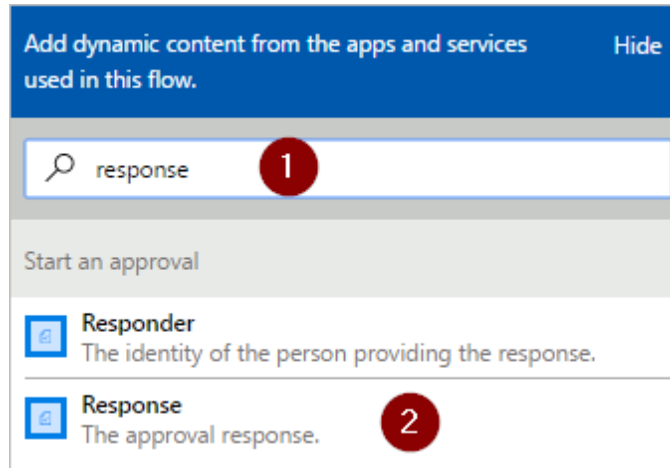
Add a condition

1. Select **New step**, and then select **Add a condition**.



2. Select the **Object Name** box, and then enter **response** into the search box on the **Add dynamic content from the apps and services used in this flow** card.

3. Select the **Response** token.



4. Select the **Value** box, and then enter **Approve** into the box.

ⓘ Note

The valid responses to the **Approvals - Start an approval** action are "Approve" and "Reject". These responses are case-sensitive.

5. Your **Condition** card should now resemble this image:

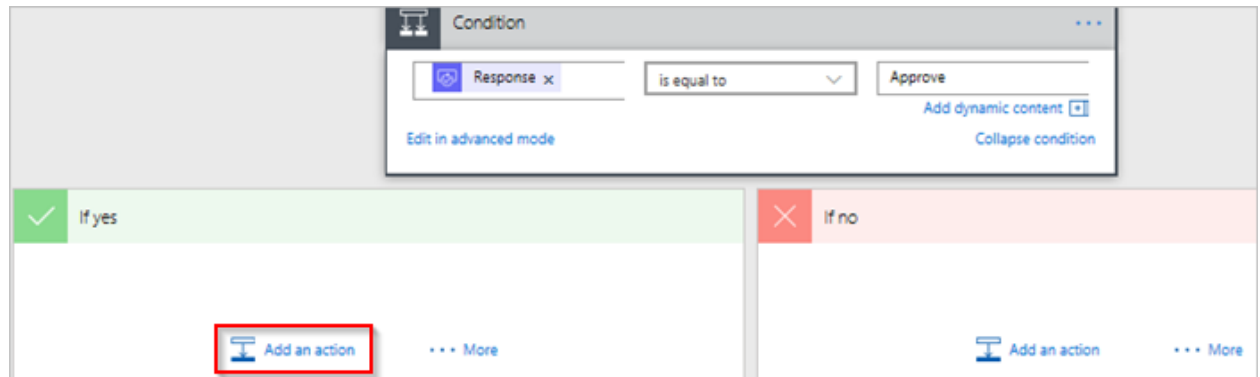


ⓘ Note

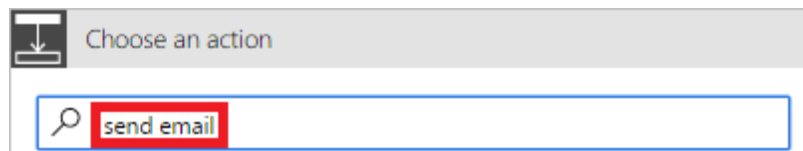
This condition checks the response from the **Start an approval** action.

Add an email action for pre-approvals

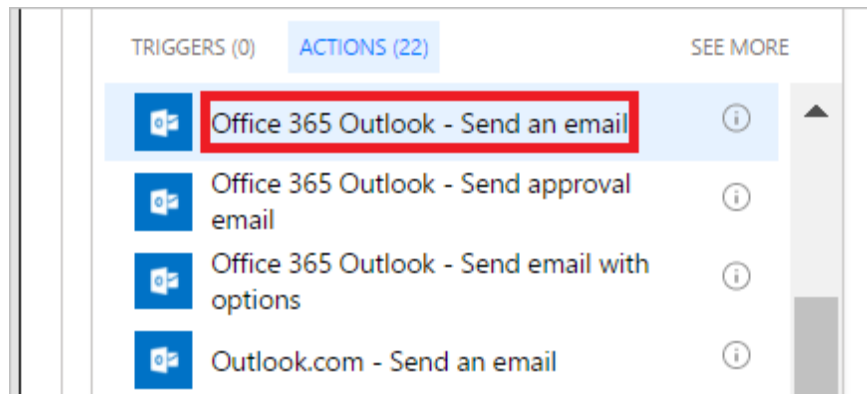
1. Select **Add an action** on the **IF YES** branch of the condition.



2. Enter **send email** into the search box on the **Choose an action** card.



3. Select the **Office 365 Outlook - Send an email** action.



4. Configure the email card to suit your needs.

ⓘ **Note**

To, **Subject**, and **Body** are required.

This card is a template for the email that is sent when the status of the vacation request changes.

Note: In the **Body** box on the **Send an email** card, use the **Comments** token from the **Approvals - Start an approval** action.

The screenshot shows a 'Send an email' form with the following fields and highlights:

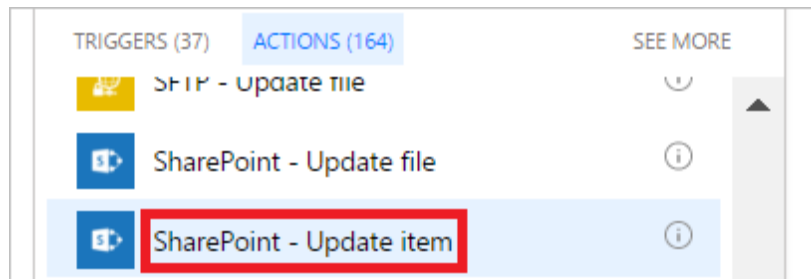
- To:** A dropdown menu with 'Created By Email' selected. A red circle with the number '1' is next to it.
- Subject:** A text field containing 'Your vacation request has been pre-approved by' followed by a dropdown menu with 'Approver Name' selected. A red circle with the number '2' is next to the text.
- Body:** A large text area containing a message template. A red circle with the number '3' is next to the 'Vacation request details' section, which includes a dropdown menu with 'Link to item' selected.

Add an update action for pre-approved requests

1. Select **Add an action** from the **IF YES** branch.
2. Enter **update** into the search box on the **Choose an action** card.

The screenshot shows a 'Choose an action' card with a search box containing the word 'update'. The search box is highlighted with a red rectangle.

3. Select the **SharePoint - Update item** action.



4. Configure the **Update item** card to suit your needs.

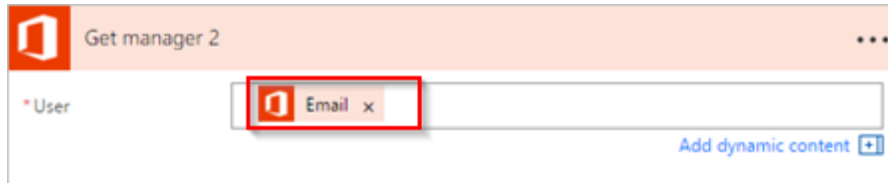
A screenshot of the 'Update item' configuration form in Power Automate. The form has a blue header bar with the 'SharePoint' icon and the text 'Update item'. Below the header, there are several fields for configuration. The 'Site Address' field is set to 'https://microsoft.sharepoint.com/teams/'. The 'List Name' field is set to '2 Step Vacation Approvals'. The 'Id' field is set to 'ID'. The 'Title' field is set to 'Title'. The 'Start date' field is set to 'Start date'. The 'End date' field is set to 'End date'. The 'Comments' field is set to 'Comments'. The 'Approved' field is set to 'No'. The 'Manager Comments' field is empty. The 'Modified' field is empty. The 'Created' field is empty. The 'Pre-approved' field is set to 'Yes' and is highlighted with a red rectangular box.

Get the pre-approver's manager

1. Use the [Get the manager for the person who created the vacation request](#) steps we did earlier to add, and then configure another **Get manager** action. This time we get the

pre-approver's manager.

2. The **Get manager 2** card should resemble this image when you're finished. Be sure to use the **Email** token from the **Get manager** category on the **Add dynamic content from the apps and services used in this flow** card.



Add the final approval action

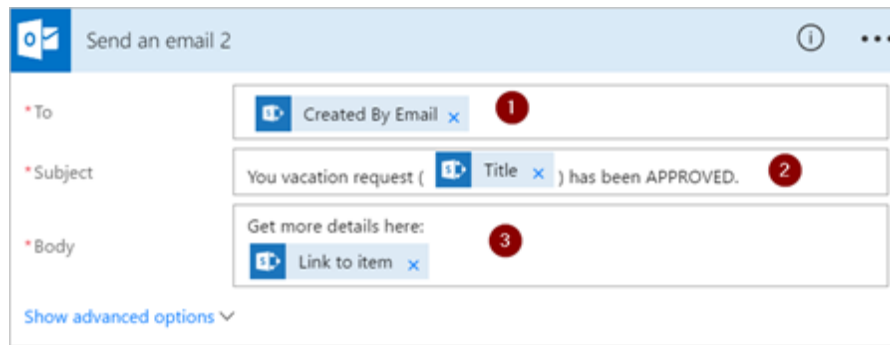
1. Use the [add an approval action for pre-approvals](#) steps we did earlier to add, and then configure another **Start an approval** action. This action sends an email request for final approval.
2. When you're done, the card should resemble this image:

Add the final approval condition

1. Repeat the steps from [add a condition](#) to add, and then configure a **Condition** that checks the final approver's decision.

Send email with final approval

1. Use the steps from [Add an email action for pre-approvals](#) to add, and then configure an action that sends an email when vacation requests are approved.
2. When you're finished, your card should resemble this image:



Update SharePoint with approval

1. Use the steps from [Add an update action for pre-approved requests](#) to add, and then configure an action that updates SharePoint when the vacation request is approved.
2. When you're finished, the card should resemble this image:

Update item 2

* Site Address

* List Name

* Id

* Title

* Start date

* End date

Comments

Approved

Manager Comments

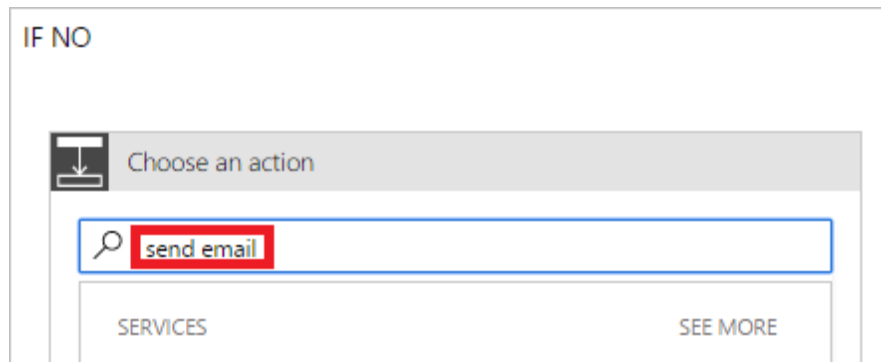
Modified

Created

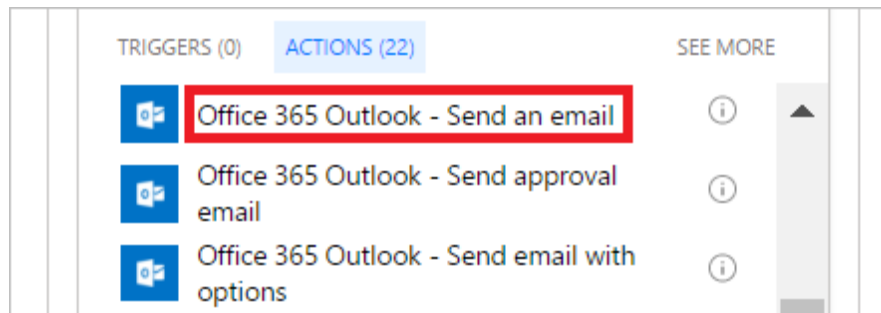
Pre-approved

Send email with pre-approval rejection

1. Select **Add an action** on the **IF NO, DO NOTHING** branch.
2. Enter **Send email** into the search box of the **Choose an action** card.



3. Select the **Office 365 Outlook - Send an email** action.



4. Configure the email card to suit your needs.

This card represents the template for the email that's sent when the status of vacation requests change.

Send an email 3

*To: Created By Email x 1

*Subject: Your vacation request has been rejected 2

*Body: You vacation (Title x) time has been rejected by Approver Email x 3

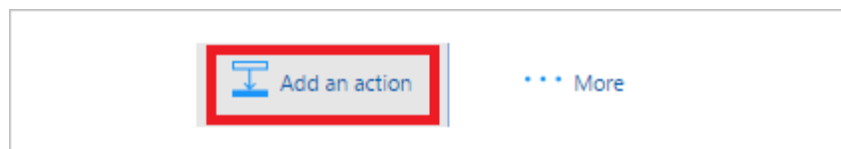
Add dynamic content

Show advanced options

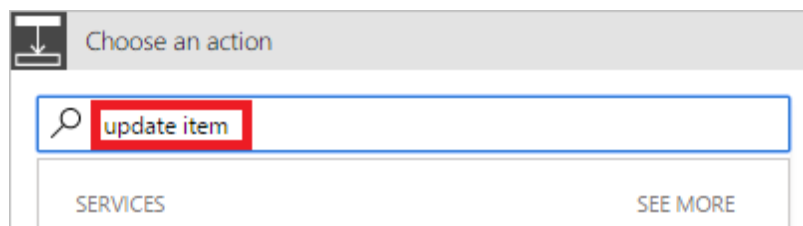
Note: This action must be added to the **IF NO, DO NOTHING** branch below the **Condition** card.

Update SharePoint with pre-approval rejection

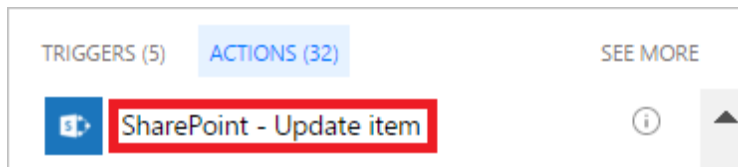
1. Select **Add an action**.



2. Enter **update item** into the search box on the **Choose an action** card.



3. Select the **SharePoint - Update item** action.



4. Configure the card to suit your needs.

Update item 3

* Site Address:

* List Name:

* Id:

* Title:

* Start date:

* End date:

Comments:

Approved:

Manager Comments:

[Add dynamic content](#)

Modified:

Created:

Pre-approved:

Send email with final rejection

1. Use the steps from [Send email with pre-approval rejection](#) to add, and then configure an action that sends an email when the vacation request is rejected by the final approver.

Note: This action must be added to the **IF NO, DO NOTHING** branch below the **Condition 2** card.

2. When you're finished, the card should resemble this image:

The screenshot shows a Microsoft Flow 'Send an email' card configuration. The card is titled 'Send an email 4'. It has three fields: 'To' with 'Created By Email' (marked with a red circle 1), 'Subject' with 'Your vacation request has been rejected' (marked with a red circle 2), and 'Body' with 'Your vacation (Title) time has been rejected by Approver Email' (marked with a red circle 3). The 'Body' field also includes a placeholder for a SharePoint item. At the bottom right is a link 'Add dynamic content' and at the bottom left is a link 'Show advanced options'.

Update SharePoint with final rejection

1. Use the steps from [Update SharePoint with pre-approval rejection](#) to add, and then configure an action that updates SharePoint if the final approver rejects the vacation request.
2. When you're finished, the card should resemble this image:

Update item 4

* Site Address:

* List Name:

* Id:

* Title:

* Start date:

* End date:

Comments:

Approved:

Manager Comments:

[Add dynamic content](#)

Modified:

Created:

Pre-approved:

3. Select **Update flow** to save the work we've done.

Flow name: VacationApprovals

✓ Update flow

If you've followed along, your flow should resemble this image:



Now that we've created the flow, let's see it in action.

Request an approval

Create a vacation request in the SharePoint Online list you created earlier.

After you save this request, the flow triggers, and then:

1. Creates a request in the approvals center.

2. Sends an approval request email to the approvers.

Your request should resemble this image:

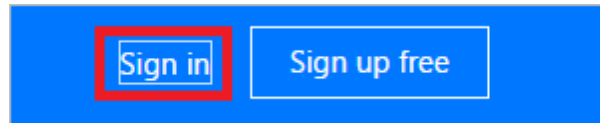
The image shows a 'New item' form for a vacation request. The form is titled 'New item' and contains the following fields and sections:

- Title ***: Travel and Fun Vacation
- Start date ***: 5/19/2017
- End date ***: 6/2/2017
- Comments**: I need some R & R
- Approved**: ☐ No
- Manager Comments**: Enter text here
- Modified**: Enter a date
- Created**: 5/18/2017
- Pre-approved**: ☐ No
- Attachments**: Add attachments
- Buttons**: Save, Cancel

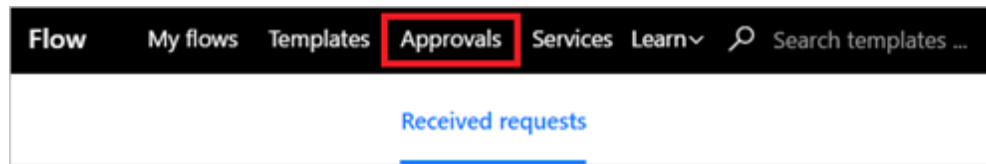
View pending approval requests

View all pending approval requests by following these steps:

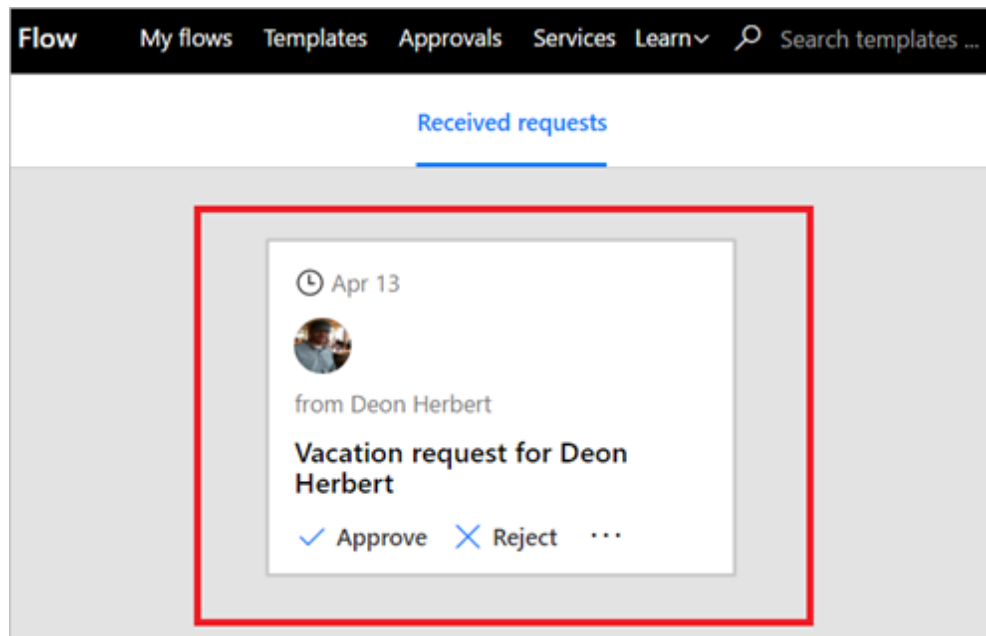
1. Sign in to [Power Automate](#).



2. Select the **Action items** > **Approvals**.



3. Find all pending approval requests under **Received**.



Pre-approve a request

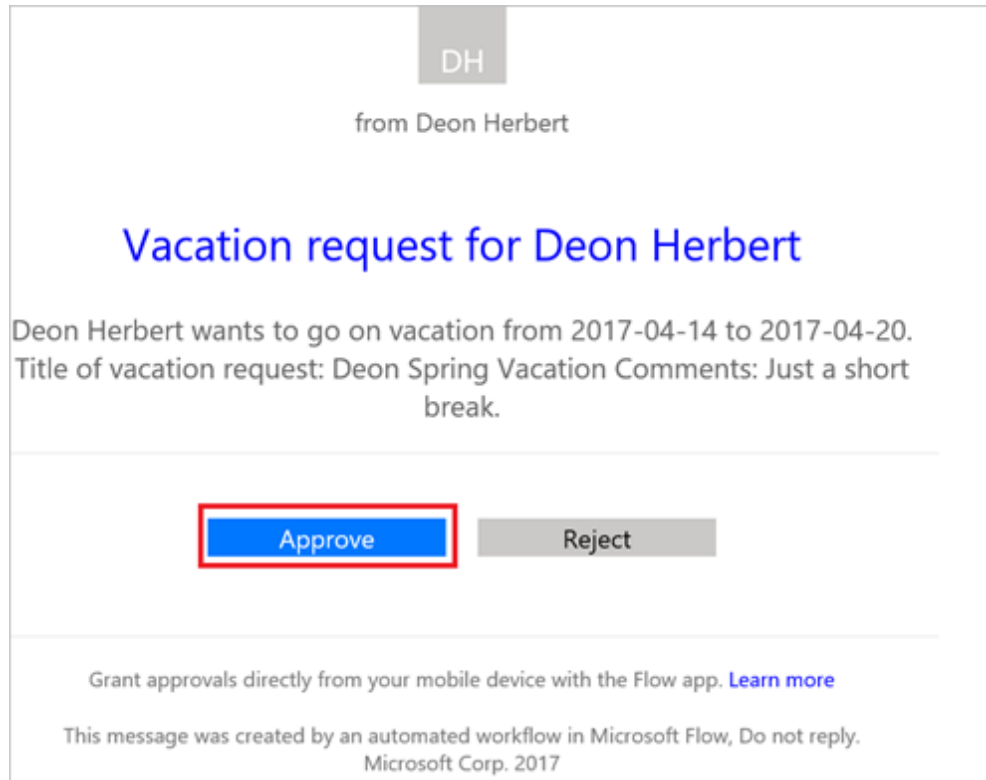
If you're an approver in an approval flow, you receive an email whenever someone creates a request. The approval request is also sent to the approvals center. You can then approve or reject requests from the email, the approvals center, or the Power Automate app.

To approve a request:

From email

1. Select **Approve** from the email you receive when an item is added to the SharePoint Online list.

Note: If you're using a mobile device with the Power Automate app installed, the Power Automate app launches, otherwise, the approvals center opens in your browser.



The screenshot shows a mobile interface for an approval request. At the top, there is a grey box with the initials 'DH' and the text 'from Deon Herbert'. Below this is the title 'Vacation request for Deon Herbert' in blue. The main text states: 'Deon Herbert wants to go on vacation from 2017-04-14 to 2017-04-20. Title of vacation request: Deon Spring Vacation Comments: Just a short break.' Below the text are two buttons: a blue 'Approve' button with a red border and a grey 'Reject' button. At the bottom, there is a footer with the text: 'Grant approvals directly from your mobile device with the Flow app. [Learn more](#). This message was created by an automated workflow in Microsoft Flow, Do not reply. Microsoft Corp. 2017'.

2. Enter a comment, and then select the **Confirm** button.

Flow My flows Templates Approvals Services Learn

Received requests Vacation request for Deon Herbert

From
Deon Herbert
deonhe@microsoft.com

Requested
Apr 13, 2017 at 10:15 AM

Details
Deon Herbert wants to go on vacation from 2017-04-14 to 2017-04-20. Title of vacation request: Deon Spring Vacation Comments: Just a short break.

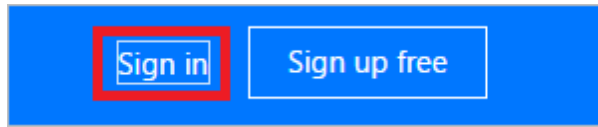
Status
You have chosen to **Approve** this request. ...

Add comments (optional)
Enjoy your vacation. 1

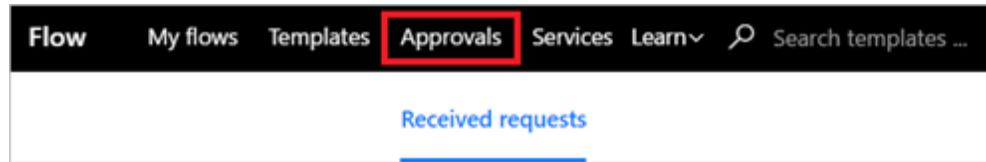
Confirm 2

From the approvals center

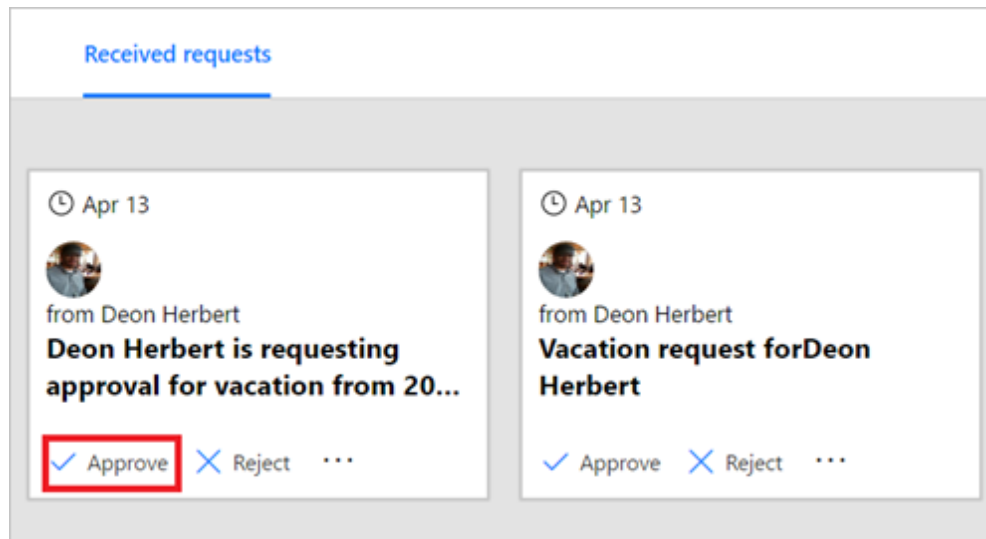
1. Sign in to [Power Automate](#).



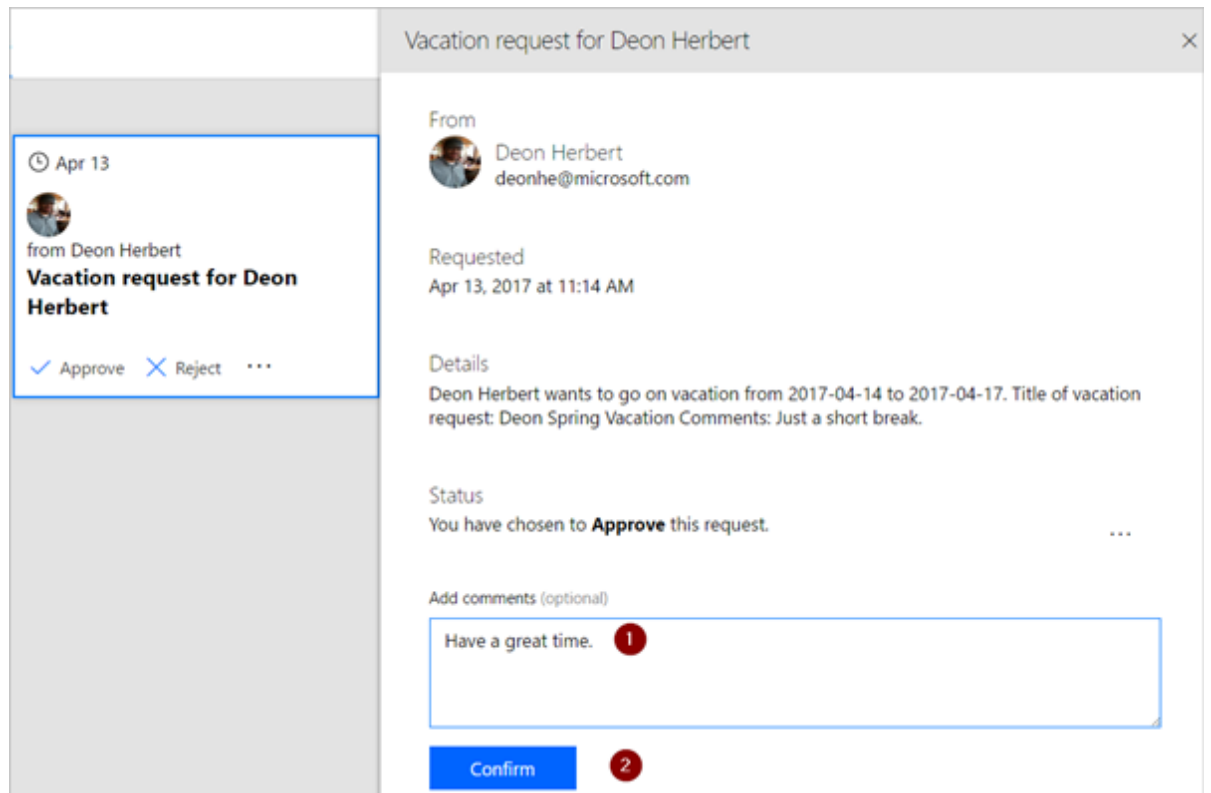
2. Select the **Approvals** tab.



3. Select **Approve** on the request you want to approve.

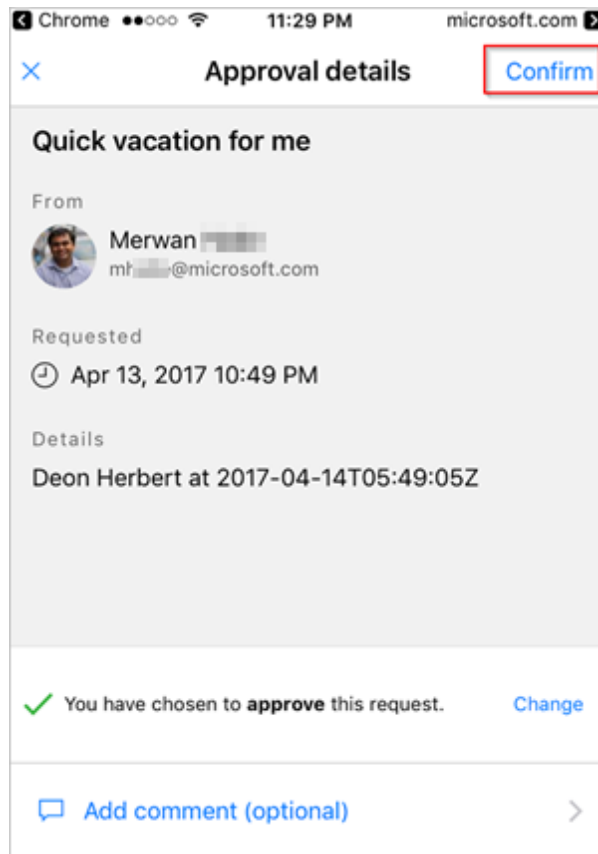


4. Add a note, and then select the **Confirm** button.

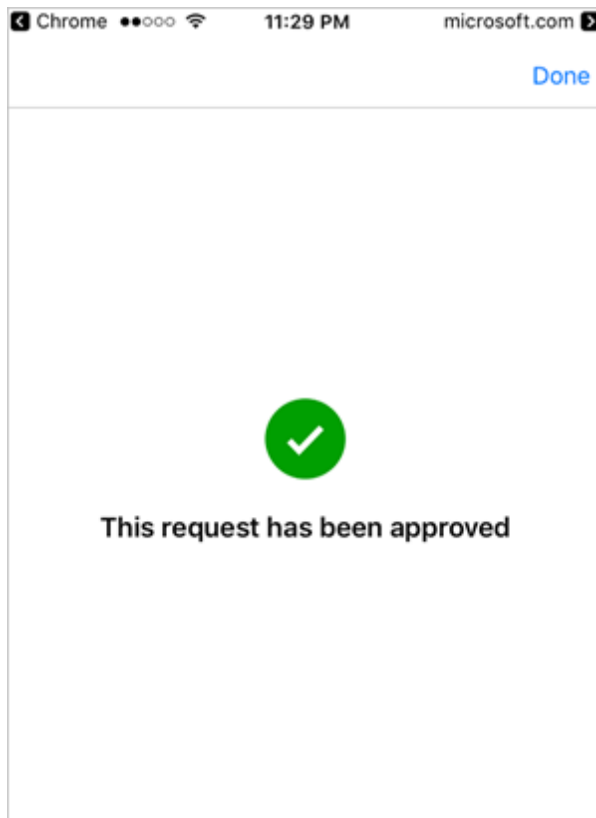


From the Power Automate app

1. On your mobile phone with the Power Automate app installed, select **Approve** from the request approval email.
2. Select **Confirm** in the upper right corner of the screen.



3. The success page shows, indicating that your approval has been recorded.



Note: The screens on Android, iOS and Windows Phone may differ slightly, however, the functionality is the same on all devices.

Approve the request

The steps to approve a request are identical to the steps to [pre-approve a request](#)

Note: The final approver gets the vacation request only after the request has been pre-approved.

Reject a request

You can reject a request via email, the approvals center, or the Power Automate app. To reject a request, follow the steps for approving a request, but select **Reject**, instead of **Approve**.

After you confirm your decision (rejection of the request), the flow runs the following steps:

1. Sends an email to the person who requested vacation.
2. Updates the SharePoint Online list with the decision, and the comments from the approver.

More information

[Single approver modern approvals walkthrough](#)


Is this page helpful?


 Yes  No

Feedback

Send feedback about

This product 

 This page

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🔄 Loading feedback...

🌐 English (United States) ⚙️ Theme

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