

# Approvals Management App

## Presenters:

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- Overview
- Business Process
- User Interface
- Use cases
- Installation process
- Resources
- Q&A

# Overview

## What we are trying to solve

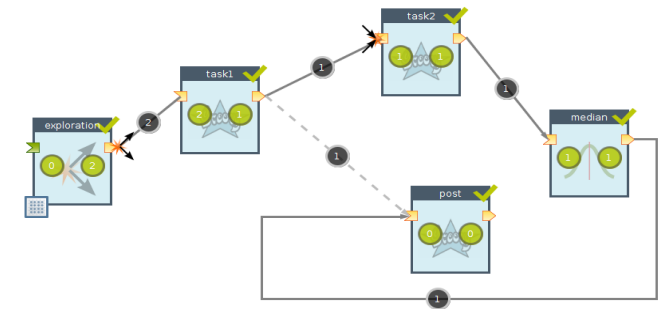
- Add flexibility, efficiency, resiliency, and responsiveness to the approval processes for Purchase orders and Purchase requisitions in a mobile application.

## Scope

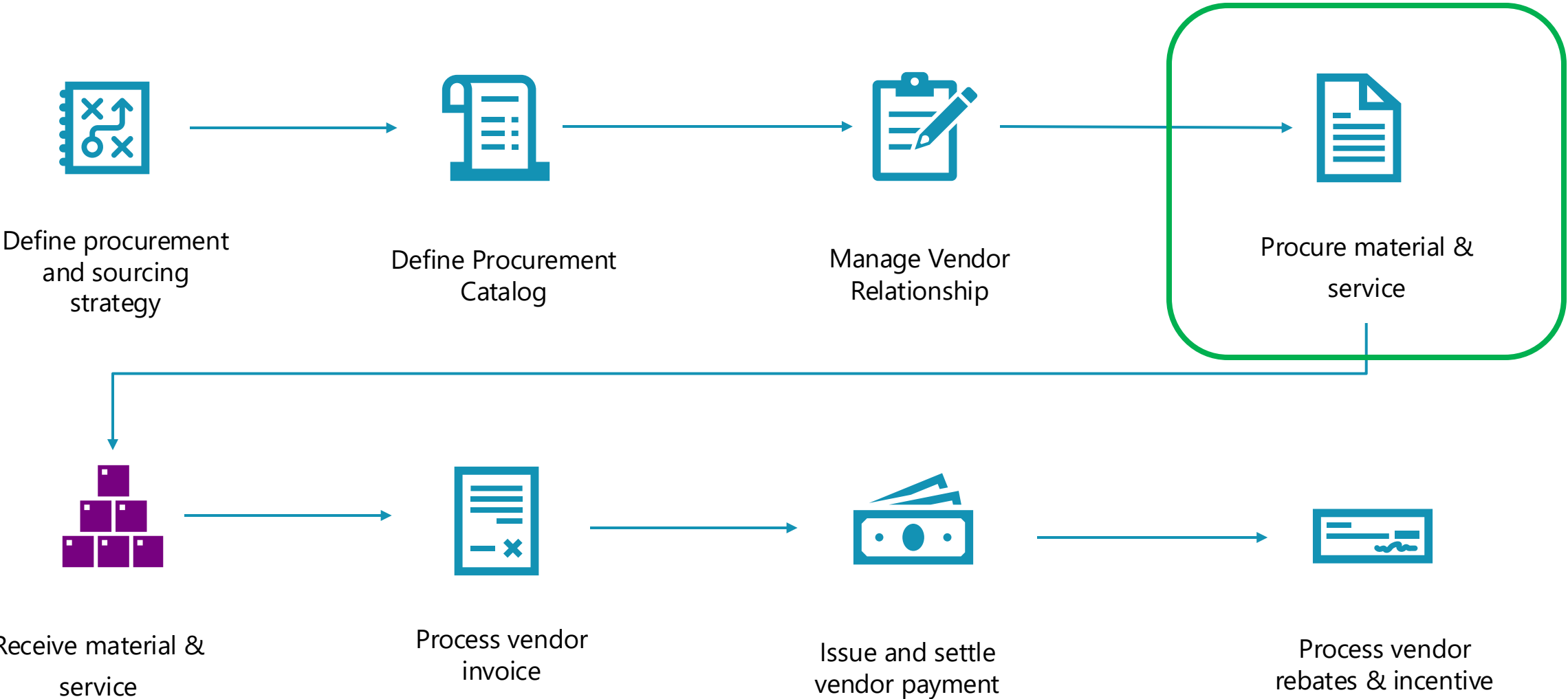
- Approve Purchase requisition
- Approve Purchase requisition line
- Approve Purchase Order
- Approve Purchase Order line

## Features

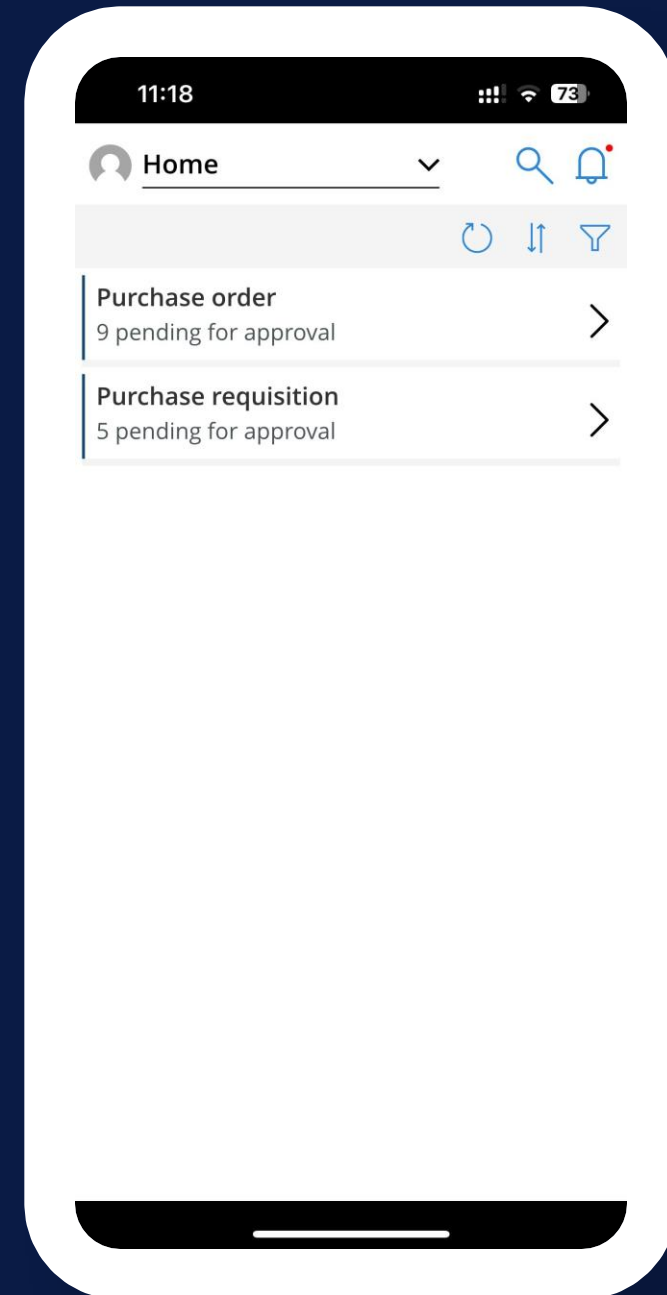
- Approve / Reject / Delegate / Request change
- Bulk Operations
- View Comments / Attachments / Timeline
- Filtering / Ordering
- Notifications

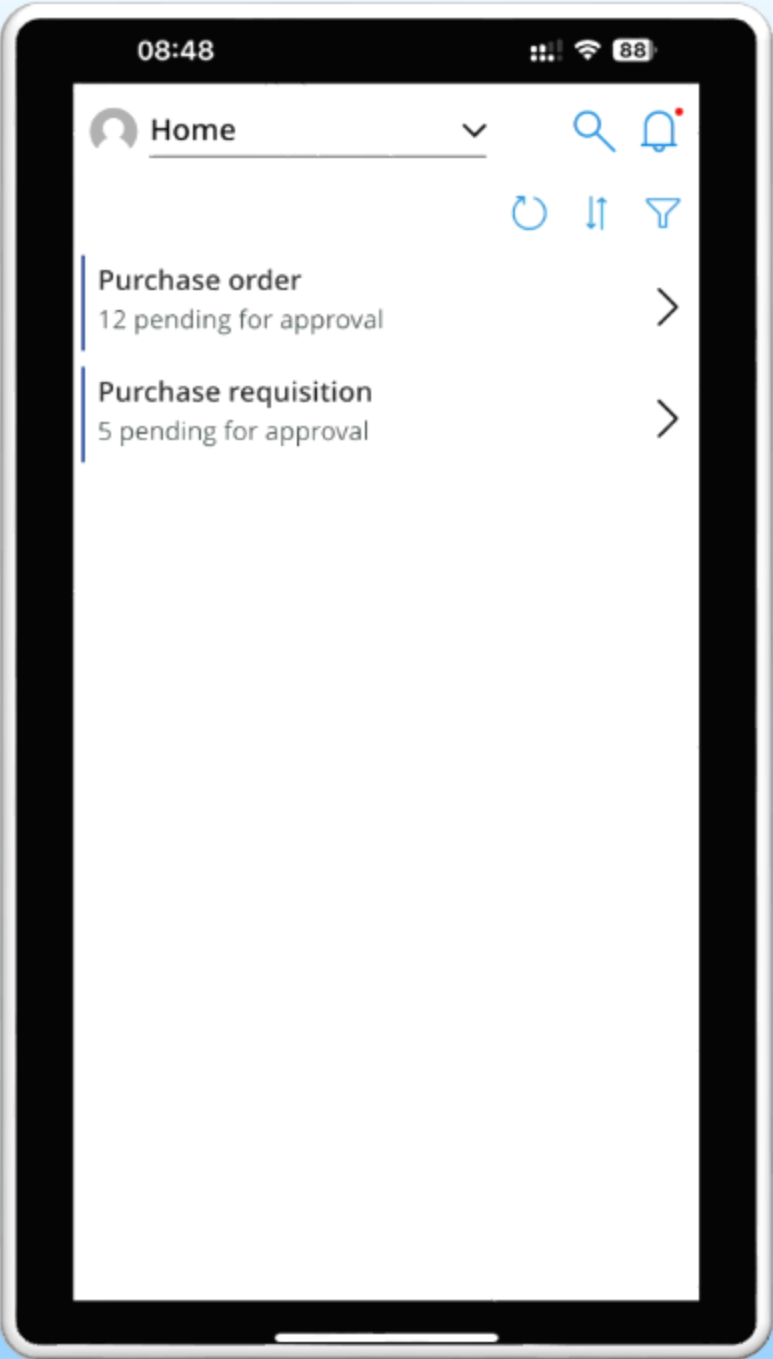


# Source to Pay Business Process Areas



# User Interface





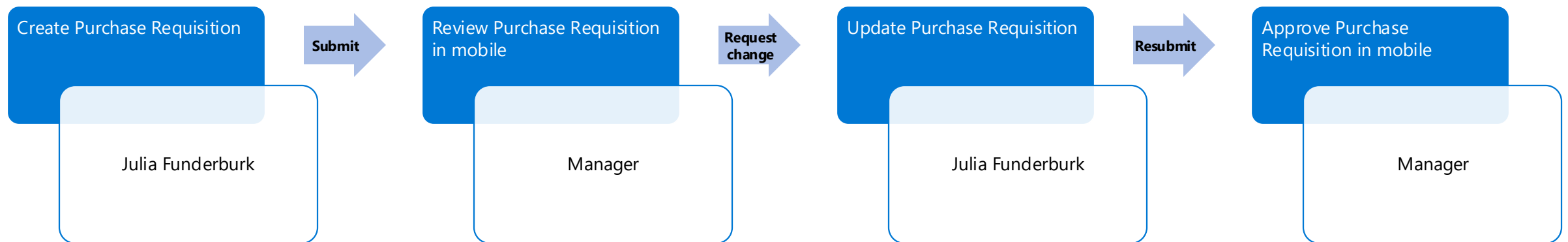


# Use case

Contoso Entertainment System manufactures, distributes and installs home electronic equipment and have multiple distribution channels. Julia Funderburk wants to raise a request for D365 training. Contoso also have a purchasing policy that all purchases above 1000 Euro requires an approval by the manager.

When the purchase requisition is submitted for training by Julia Funderburk, her manager would like to view the purchase requisition from the mobile device.

After initial review, the manager “request change” on the purchase requisition and sends it back to Julia as it does not have sufficient details. Julia subsequently furnishes the additional details leading to approval of the purchase requisition by her manager from the mobile device



# Contoso Entertainment System USA

Search people ...



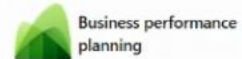
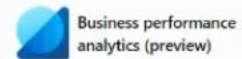
## Work items assigned to me

Cash advance request : Record returned  
 Expense reports : Record returned  
 Catalog : catalog approval  
 Expense reports : Expense report appr...  
 Cash advance request : Cash advance ...  
 Approve travel requisition  
 Catalog : catalog approval

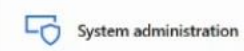
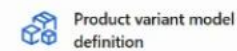
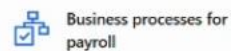
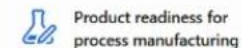
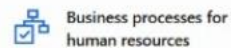
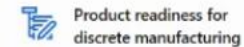
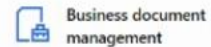
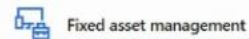
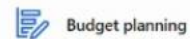
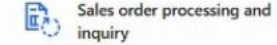
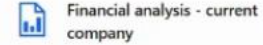
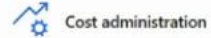
## To-do list

You're all caught up on your tasks.

## APPS



## WORKSPACES

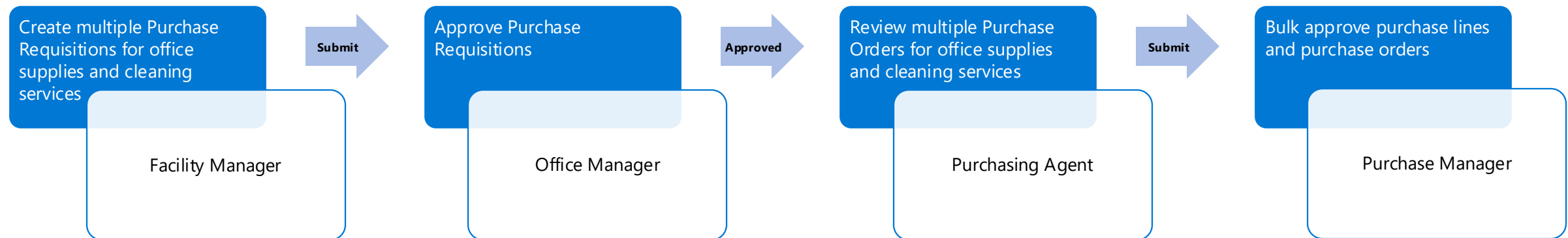


# Use case – Review and Approve POs in Bulk

Contoso Entertainment System manufactures, distributes and installs home electronic equipment and have multiple distribution channels.

Facility manager raised requests for office supplies and cleaning services. Contoso has purchasing policy that it requires a manager approval to approve purchase requisitions and purchase order for all purchases above 1000 dollars. Office Manager has approved multiple purchase requisitions as a result multiple purchase orders have been automatically created.

Purchasing agent has reviewed and verified the purchase orders and submitted them for purchase manager approval. Purchase manager will review multiple purchase orders and purchase order lines and perform bulk approvals.



Finance and Operations

Search for a page

USMF | Contoso Entertainment System USA

Workflow Options

Personalize

Always open for editing

Personalize this page

Add to workspace

Page options

Security diagnostics

Advanced filter or sort

Record info

Share

Get a link

Create a custom alert

Manage my alerts

Power Automate

See your flows

Create a flow

Procurement and sourcing workflows

Standard view

Filter

	St...	Default	ID	Name	Association	Type
		✓	000374	Purchase order line workflow	USMF	PurchLineTemplate
✓	✓		000063	Purchase order workflow	usmf	PurchTableTemplate
		✓	000326	Purchase requisition review	Organization...	PurchReqReview
			000062	Purchase requisition review	Organization...	PurchReqReview
			000081	Replenishment requisition review	Organization...	PurchReqReview
			000141	Spending Limit PR Line Review	Organization...	PurchReqLineReview
ⓘ	✓		000349	Vendor rebate approval	USMF	TAMVendRebateAppr

Purchase order workflow

Workflow

Level up

Level down

Cut

Copy

Paste

Toolbox

Properties

Error pane

Basic Settings

Validation

Navigation

Edit

Show

Modify element

Advanced

Workflow elements

Approvals

Approve purchase order

Approve purchase order, editable

Flow controls

Conditional decision

Manual decision

Parallel activity

Subworkflow

Line item workflows

Purchase order line workflow

Tasks

Review purchase order

Review purchase order (editable)

Workflow

Start

Purchase order line...

Approve purchase o...

End

Errors and warnings

Description Path

Errors and warnings

Save and close

Cancel

 Home



**Purchase order**

3 pending for approval



**Purchase requisition**

3 pending for approval



# Installation process

## Prerequisites

- License required at least Operations - Activity (roles: *Buying agent, Purchasing agent, Purchasing manager* or *System administrator*)
- Version of Microsoft Dynamics 365 Finance and SCM: **10.0.41 or later**
- Environment link Dataverse [Enable Power Platform Integration](#)

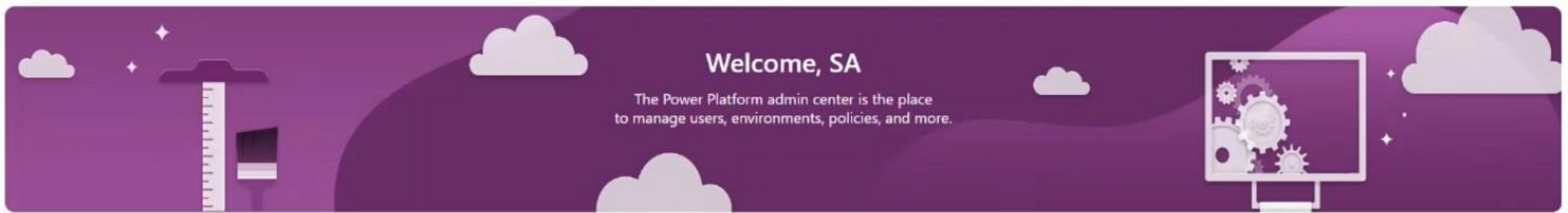
## Limitations

- Not available for Microsoft Cloud for Sovereignty

## How to install Approval Management App

- [Onboard the Approvals Management mobile app](#)

- Home
- Environments
- Environment groups
- Advisor
- Security
- Analytics
- Billing
  - Licenses
- Settings
- Copilot
- Resources
- Help + support
- Data integration
- Data (preview)
- Policies
- Admin centers



+ Add cards   Share feedback

#### Service health

0 incidents or advisories.

#### Message center

### 72 unread messages

- Dynamics 365 Customer Service – Create custom summaries for any record type in Customer Service
- Microsoft Dataverse – Service Update 9.2.24101.00000 for NAM
- Microsoft Dataverse – Service Update 9.2.24101.00000 for EUR
- Microsoft Dataverse – Service Update 9.2.24101.00000 for APJ

Show all

#### Documentation

- Power Platform admin center
- Activate Managed Environment
- Licensing overview for Microsoft Power Platform
- Power Apps and Power Automate licensing FAQs
- Microsoft Power Platform Center of Excellence Kit
- Microsoft Power Platform Adoption
- Power Platform Community
- Microsoft Dynamics Community



#### Advisor

Recommendation may show for up to a week once acted on.

### 5 recommendations

- Enable data loss prevention policy enforcement for Copilot Studio View details
- Review Power Apps license recommendations View details
- Assign licenses to pending Power Apps license requests View details
- Enable Content Delivery Network (CDN) to improve website performance View details
- Maintain tenant hygiene by cleaning up unused apps View details

View recommendations

# Resources





# Resources

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## Business Process

[Help organizations manage and optimize the procure to pay business processes - Dynamics 365 | Microsoft Learn](#)

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## Learn

[Approvals Management mobile app overview \(preview\) - Supply Chain Management | Dynamics 365 | Microsoft Learn](#)

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[Workflow system overview - Finance & Operations | Dynamics 365 | Microsoft Learn](#)

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## Viva engage

[Viva Engage : Dynamics 365 and Power Platform Preview Programs : Approvals app](#)

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[Viva Engage : Dynamics 365 and Power Platform Preview Programs : D365 Procurement and Sourcing](#)

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## Ideas portal

[Ideas portal \(dynamics.com\)](#)

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# QUESTIONS

# Feedback

Approvals Management mobile  
app for Dynamics 365 Supply  
Chain Management (DTV076EXT2)



