Developing a Power Automate Flow for Expense Submission Approval

A comprehensive guide illustrating the creation of a streamlined flow that integrates seamlessly with the SharePoint list created in the previous guide, facilitating approval processes and email notifications for Expense Submissions.

Step 1: Start the flow from Power Automate

- From the Power Automate Home screen, start a flow by clicking + Create.
- Select Automated Cloud Flow.
- Name the flow: **Expense Approval Flow**.
- Select the trigger: When an item is created - SharePoint. And click create.
- To correct the parameters on the trigger:
  - Select the trigger.
  - Select the SharePoint site.
  - Select the list named **Expense Submissions**.
- Use the same site and list that you used for the Power App.
- Below Advanced parameters, expand How often do you want to check for items?
- Update intervals to 15 seconds

Step 2: Get the Attachments from the New Item

- Next, we want to get the attachments from the new item to use them later in the flow.
- Click the + below the trigger and click add an action.
- Search and select Get Attachments for SharePoint.
- Fill in the Site Address and List Name with the same values as the trigger.
- Use dynamic content by clicking on the lightning bolt to fill in the ID.

Step 3: Get the Attachment Content

- Click the + below the “Get Attachments” action.
- Fill in the Site Address and List Name with the same values as the previous action.
- Use dynamic content to fill in the ID with the ID from the trigger.
- Use dynamic content to fill in the File Identifier with the ID from the get attachment action.
- This action adds a “for each” loop around it. This is because there might be more than one attachment for each item, and we want to get the content of each attachment.

Step 4: Start and Wait for an Approval

- Add a Start and wait for an approval action by clicking on the + outside of the for each loop.
- Select the Approve/Reject First to respond approval type. This type means that the approval request will be sent to one or more people, and the flow will continue as soon as one of them responds.
- Title is the subject line of the email that will be sent to the approver. You can use dynamic content to make it more informative, such as: **Expense for {Type of Expense} by {Employee Name}**.
- Assigned to is the person or people that should get the approval request. For the creation and testing purposes, I recommend using your own email address.

Step 4 cont.: Start and Wait for an Approval

- Details is the body of the email that will be sent to the approver. You can use dynamic content to add more information, such as:
  - **{Employee Name} has submitted a new expense.**
  - **Type of Expense: {Type of Expense}**
  - **Amount: {Amount}**
  - **Notes: {Any additional notes provided}**
  - **Date of Expense: {Date of Expense}**
- Use dynamic content to populate the item link. Select AbsoluteURI from the Get Attachments action.
- Item link description is the text that will be shown as a hyperlink to the SharePoint attachment. Type: **Expense attachment**.

Step 5: Add a condition based on the approval response

- Click on the first + below Start and wait for an approval and add an action.
- Search and select the Control Condition action.
- Fill in the condition with dynamic content from the previous action: Responses Approver response is equal to **Approve**.
- This will create two branches for the flow: one for the case when the approval response is Approved, and one for the case when the approval response is Rejected.

Step 6: Add Actions to the True Condition

- Add a SharePoint Update item action.
  - Fill in the Site Address and List Name with the same values as the trigger.
  - Use dynamic content to fill in the ID with the ID from the trigger.
  - Fill in the Employee Name, Date of Expense and Amount with the information from the trigger.
  - Click Show All under Advanced parameters.
  - Update the Approval Status Value to **Approved**.
- Click on the first + below Update item and add an action.
- Search and select the Office 365 Outlook Send an email (V2) action.
  - Fill in the To field with dynamic content. Select Created By Email from the trigger.
  - Fill in the Subject field. Use dynamic content to make it specific: **Your expense for {Type of Expense} was approved**.
  - Fill in the Body field with a message that provides more details about the approval using dynamic content:
    Expense {ID} for {Type of Expense} in the amount of ${Amount} was approved.

Step 7: Add Actions to the False Condition

- Add a SharePoint Update item action.
  - Fill in the Site Address and List Name with the same values as the trigger.
  - Use dynamic content to fill in the ID with the ID from the trigger.
  - Fill in the Employee Name, Date of Expense and Amount with the information from the trigger.
  - Click Show All under Advanced parameters.
  - Update the Approval Value to **Rejected**.
- Click on the first + below Update item and add an action.
- Search and select the Office 365 Outlook Send an email (V2) action.
  - Fill in the To field with dynamic content. Select Created By Email from the trigger.
  - Fill in the Subject field. Use dynamic content to make it specific: **Your expense for {Type of Expense} was rejected.**
  - Fill in the Body field with a message that provides more details about the approval using dynamic content:
    Expense {ID} for {Type of Expense} in the amount of ${Amount} was rejected.

Step 8: Test the Flow

- To test the flow, click on Save on the top right and then Test.
  - Select Manual.
  - Click Test.
- On a different tab, navigate to the Power App and click play.
- Submit a new expense item with an attachment.
  - Ex. **Name**: Emily Brown, **Date**: 10/25/24, **Type of Expense**: Meal, **Amount**: 92.00, **Notes**: Dinner with customer, **Attachment**: Receipt 4
  - Ex. **Name**: Sarah Johnson, **Date**: 10/18/24, **Type of Expense**: Travel, **Amount**: 150, **Notes**: Hotel Lodging, **Attachment**: Receipt 5
  - Ex. **Name**: Emily Brown, **Date**: 10/14/24, **Type of Expense**: Meal, **Amount**: 81.48, **Notes**: Lunch with customer, **Attachment**: Receipt 6
- Go back to the Power Automate screen to see the flow in action.
- Click on Approve or Reject for each example according to the following:
  - Click **Reject** for Receipt 4
  - Click **Approve** for Receipt 5
  - Do not approve or reject Receipt 6, leave on pending status
- Check the SharePoint list and Power App to see how the approval status changes the item.
- Check your email and see the confirmation email.