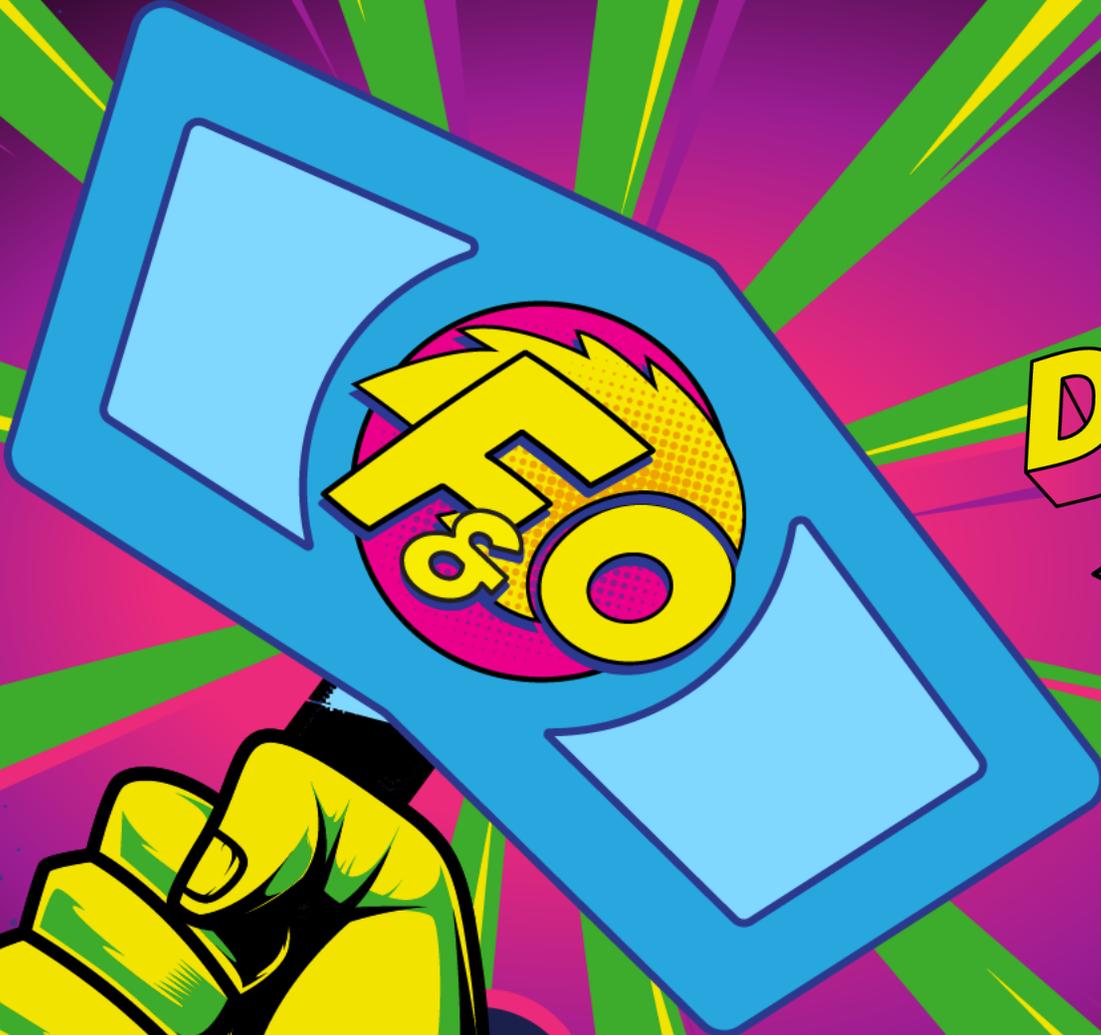


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MARCH 2023

FINANCE &
OPERATIONS

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Welcome 2023 Dynamics Con Virtual

- **Thank You**
 - You
 - Dynamics Con
- **Herb Johnson**
 - D365 Senior Consultant with Stoneridge Software
 - D365/Dataverse/CRM since 2010
 - IT since 1984
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 - <https://www.linkedin.com/in/herb-johnson-d365/>
- **Chat**



Fin Opps Approval with Outlook and Teams

Give Manager the ability to easily make approval decisions on the go without having to log into Fin Ops. Using Power Platform out of the box functionality, you'll see how the Fin Ops Approval process can be automated to improve your Organization's efficiency. No Custom code and no special licenses.



Agenda

- **Background**
 - Project Manager Request
 - Microsoft References
- **Demo**
 - Show the user experience
- **What is needed to make this happen?**
 - See the components involved
- **Dive deeper into the Power Automate**
 - Look at each Action in the Power Automate

Background

- **Project Manager**
 - Saw a need for a better user experience for Approving or Rejecting PO's
- **Microsoft Learn pages**
 - Business events and Microsoft Power Automate
 - <https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/business-events-flow>
 - Business events and workflow approvals
 - <https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/how-to/how-to-workflow>
- **Reached out to me**

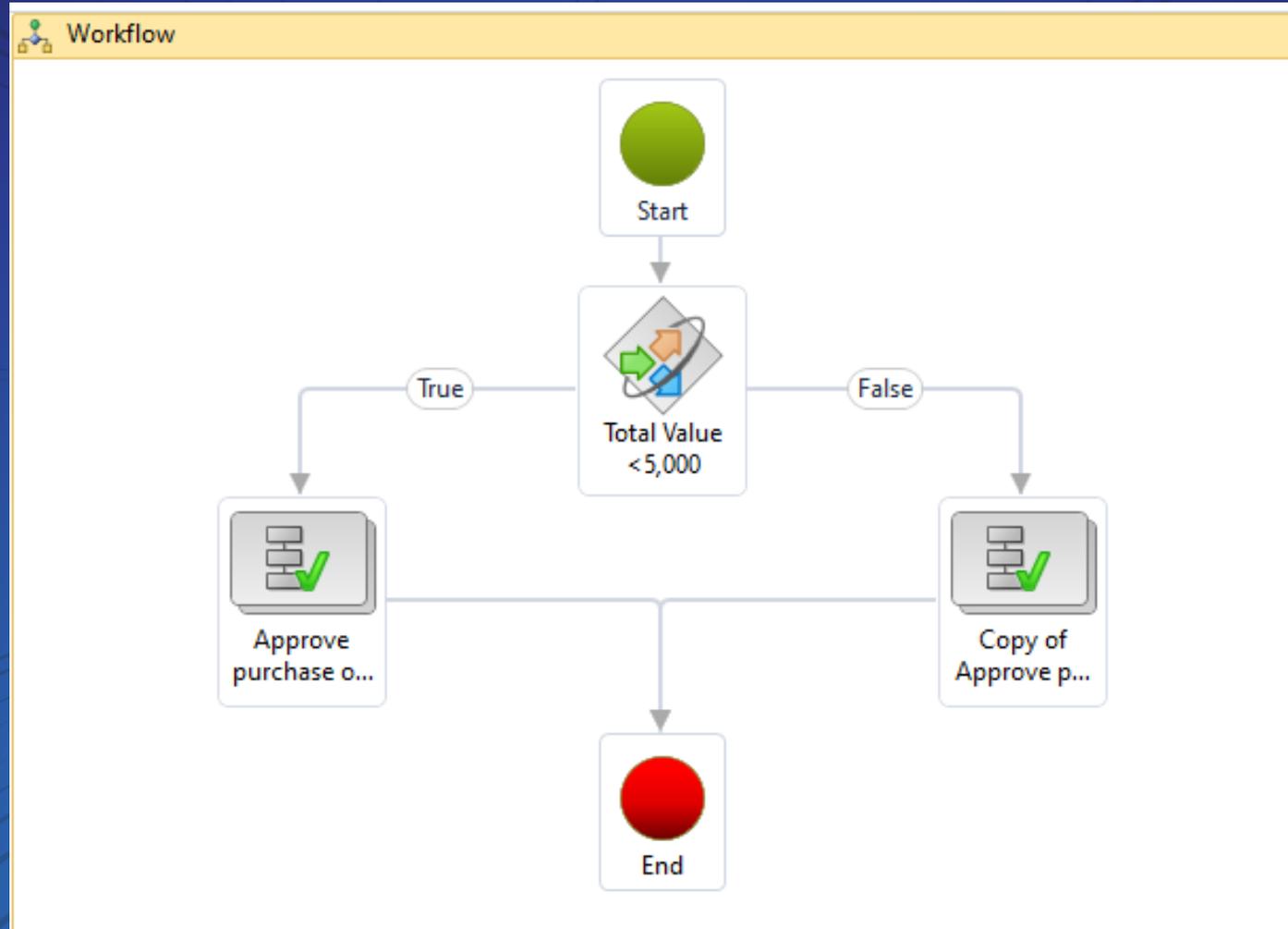
Demo

- Request Purchase Order approval in Fin Ops
- Look at the Request in Outlook and Teams
- Approve that Request in Outlook or Teams
- Refresh Purchase Order in Fin Ops

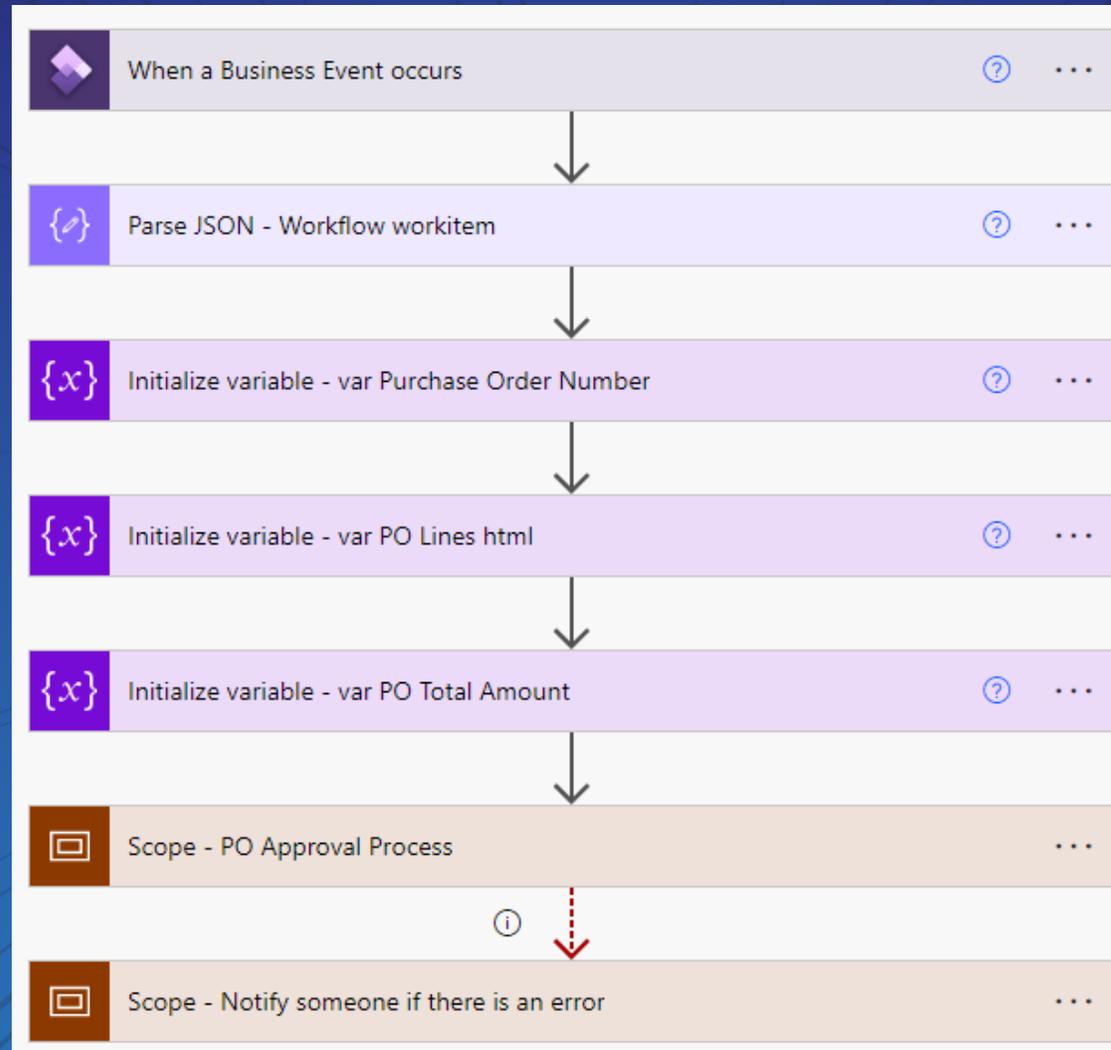
What is needed?

- Account with access Fin Ops and Power Apps
- Fin Ops Approval Workflow
- Power apps instance
 - Solution to hold the Power Automate
 - Power Automate

Fin Ops Workflow



The Power Automate



Live Chat



Thank You

- **To You**
 - For voting for my session
 - For attending my session
- **To Dynamics Con**
 - For giving me the opportunity to share my knowledge



Contact Information

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