



How to get to using the purchase order app

Scope:

The Approval Management App in Microsoft Dynamics 365 Finance & Operations (D365F&O) provides a seamless way for users to take an action on Purchase Orders (POs) and Purchase Requisitions (PRs) without needing to log in to D365F&O. Instead, approvals can be managed directly from Microsoft Teams and the D365 mobile app, improving efficiency, flexibility, and user convenience.

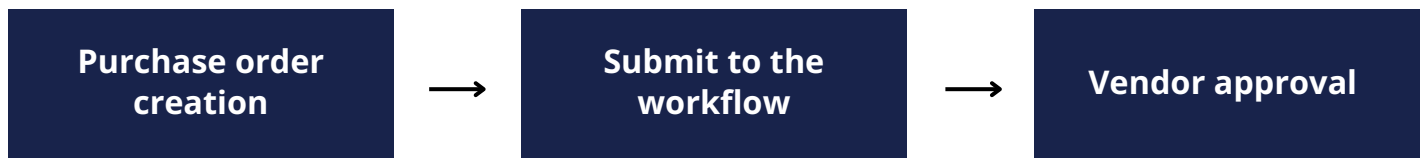
Features of the app:

Approvers can take below action: Approve/Reject/Delegate/Request change

Approvers can view comments / attachments/ timeline

Approver gets Notification when the approver request has been made by the workflow originator.

Business process:



Installation process:

Prerequisite:

Licence required: Activity/ operations

Version: 10.0.41 or later

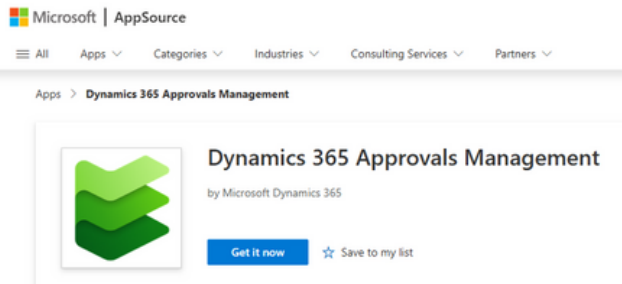
Environment should be power platform enabled

Installation process:

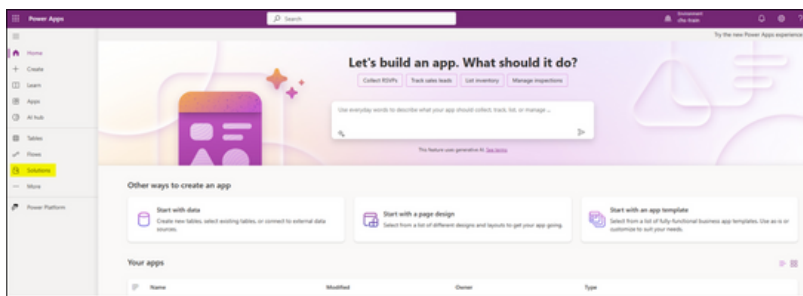
1. Log in to **Power Platform admin center**
2. On the left navigation pane, select **Resources > Dynamics 365 apps**
3. Search for and select the app named *Dynamics 365 Approvals Management*
4. On the top toolbar, select **Install**
5. Select the environment where you want to install the app, review the packages that will be installed, and select the **I agree to the terms of service** checkbox
6. Select **Install**

If you can't see the app in resources **Dynamics 365 apps**, click on the link below:

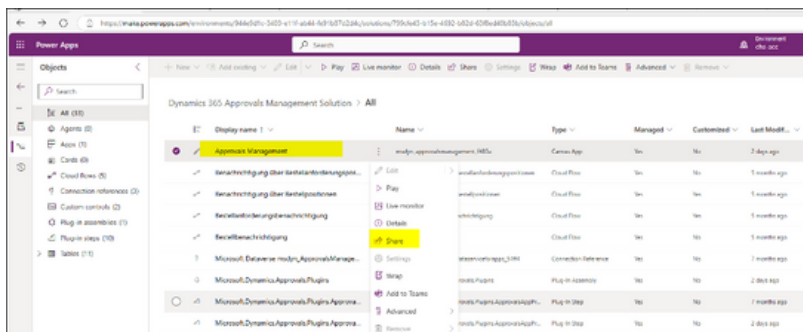
[Dynamics 365 Approvals Management](#) which will direct you to the app source



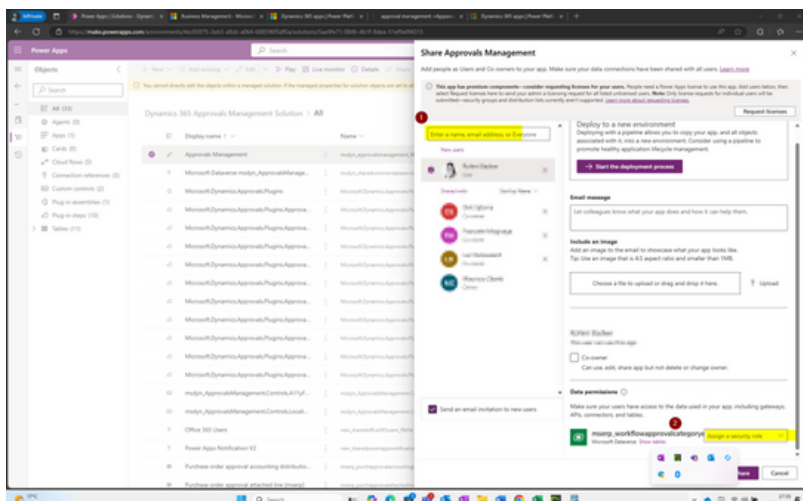
Click on Get it now
 Select your environment
 Agree the terms and condition
 And Click on install
 Go to power apps and select the right environment



Go to solutions → managed tab
 Search for the app → click on Approval management D365 solutions app

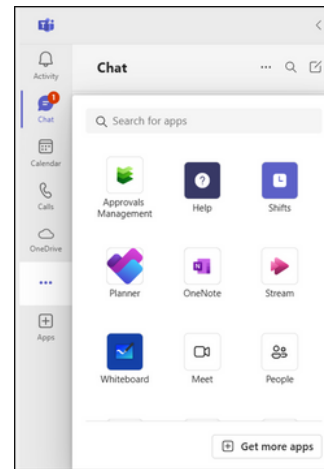


Go Share approval management app with the users

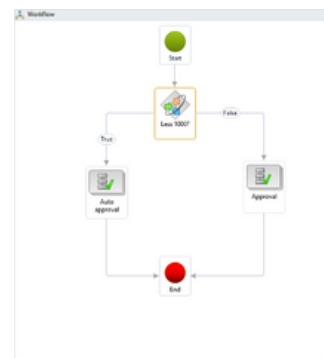


1. Select the user
2. Assign role to the user to access the app in mobile or on teams

The same way you can add app to the teams



D365 workflow setup: setup purchase order workflow



Create purchase order
 Submit to the workflow
 And the user gets a notification and request for the approval on their teams and mobile app

