

# SMARTBOOKS

## APPROVAL REQUEST INSTRUCTION

### INTRODUCTION

It's likely that you're familiar with process automation in the form of workflow rules. Approvals take automation one step further, letting you specify a sequence of steps that are required to approve a record.

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including from whom to request approval and what to do at each point of the process.

Approval requests can be completely customized and can be sent individually, or with multiple steps as part of a more complex workflow.

Approval requests are web based and desktop application ready and can be managed from anywhere - saving time, reducing errors, and accelerating progress.

### LIST OF REQUESTS BY USER

#### Login

Enter your registered username or registered email address to login the system. You can tick the checkbox **Remember me** to access easier next time. If you don't have account, please contact us <https://smartbooks.ssaudit.com/contact/>, we will check and feedback you later.

#### Main page

If you want to request approval from stakeholders and set up actions sent in sequence rather than all at once, you can set up multiple Approval Requests in a single path. Approval Requests will pause the workflow until the Request is Approved or Declined. The workflow will then continue through subsequent conditions and actions on the path defined by blocks connected to the outcomes of the Approval Request.

For example:

- A training request is approved by an employee's manager
- This automatically triggers a subsequent approval request that's then sent to the HR Director for final confirmation.
- If the training request is declined by the manager, an update request is sent to the employee to modify or add additional information to the request.

# Approval Request

The screenshot shows the 'Approval Request' interface. On the left is a sidebar with a 'Request' button at the top. Below it are 'Folders' and 'Admin' sections. The 'Request' section includes 'Pending' (3 items), 'Submitted', 'Drafts', 'Approval', and 'Finished'. The 'Admin' section includes 'Set up'. The main area is titled 'List of requests' and contains a search bar and a table of three requests. Each request row includes a checkbox, a star icon, a user profile, the request title, and an action button.

Request	Status	User	Request Title	Action
<input type="checkbox"/>	★	Luong Tran Tien 5 days ago	Leave Request - Leave Request Form	Waiting for Approval
<input type="checkbox"/>	★	Luong Tran Tien 5 days ago	Purchase Order - Purchase for new Computer	Manager Approve
<input type="checkbox"/>	★	Demo User 5 days ago	Leave Request - day off today morning (20/10/2021)	Waiting for Approval

Showing 1 to 3 of 3 entries

Previous 1 Next

## Pending

List all requests that are waiting approval or need you approve

## Submitted

List all requests that are submitted by you

## Drafts

List all requests that are created by you, not yet submitted

## Approval

List all requests that need you approve

## Finished

List all requests that are finished or rejected

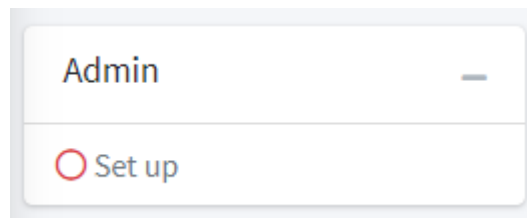
## Admin - Set up

Create new form, template, set rule

## CREATE A WORKFLOW RULE

Automate your organization's standard process by creating a workflow rule.

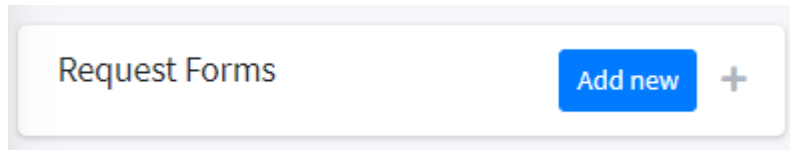
In Admin Card, Click Set Up



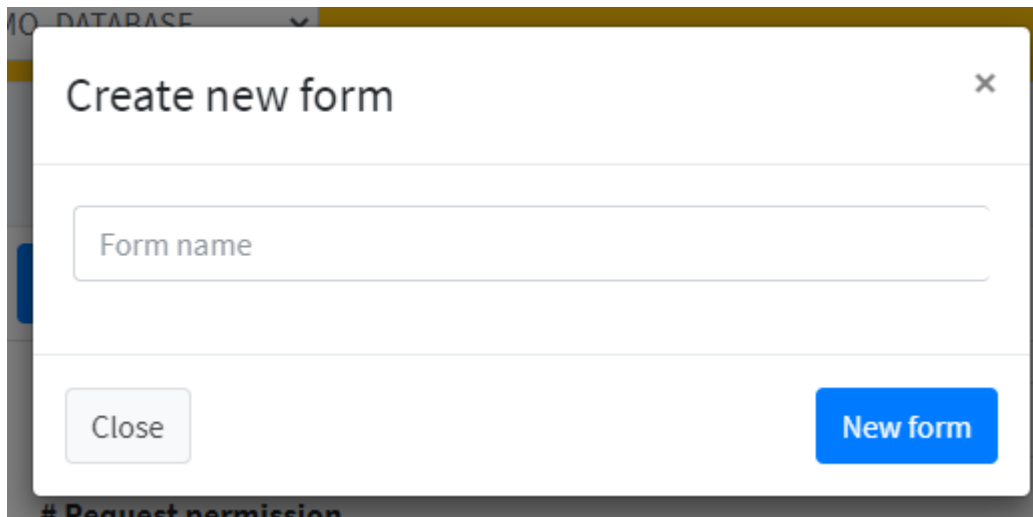
## Create New Form

Get started with creating a new form for workflow.

In **Approval Form** page. Click **Add New** in **Request Form** card. It will show **Create new form** modal



Type **Form Name** in **Create new form** modal. Then click **New Form** button

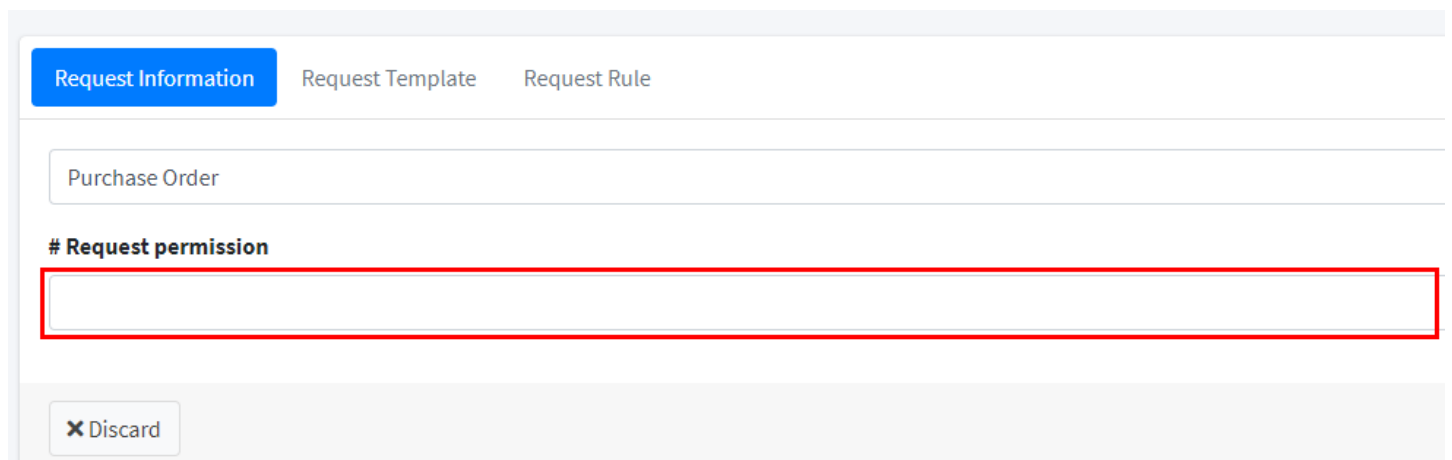


When form created, you can set the rule for the form

## Set Form Permission

Set the permission to whom can access this form (create, approve, view)

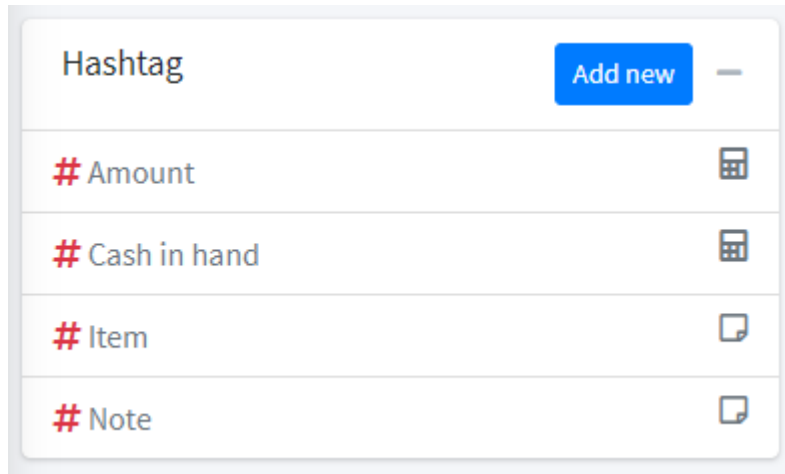
In **Request Information** tab, select the options in **Request permission**. This is a list of your company account, department, head of departments... Multiple choices are available.



## Create new hashtag

Field values that users can input from the form.

In **hashtag** card, click **Add New** button or click items below for the detail. It will open Create new hashtag modal



The image shows a 'Hashtag' card with a blue 'Add new' button and a minus sign. Below the header is a list of four items, each with a red hashtag symbol and an icon:

Hashtag	Icon
# Amount	Calculator icon
# Cash in hand	Calculator icon
# Item	Document icon
# Note	Document icon

**Hashtag name:** Name of the hashtag

**Type:** Membership, Number, Text, DateTime, Option

**Require:** Check it if this hashtag is required as default

**Editable:** Check it if this hashtag is editable as default

**Value Default:** Input default value of this hashtag

When finished, click **Save** button to submit form

## Create new hashtag ×

#

**Type**

Require  Editable

### Design form template

Design a template for the form

To insert a hashtag, type # where you want to insert, then, a dropdown box will show the list of hashtags

Item

Amount:

Note:

Insert hashtag: #

- Amount
- Cash in hand
- Item
- Note

Request Information **Request Template** Request Rule

[#Request Title]  
From: #Requestor

# Status  
#Requested Date

Source Sans Pro

# Payment Request

Item: #Item

Amount: #Amount

Note: #Note

## Set up the rule

0 Draft + 1 First Line Manager + 2 Finished

< Previous Next >

# s:Step Role  Require  Editable

All Membership

# s:Status  Require  Editable

Default Value

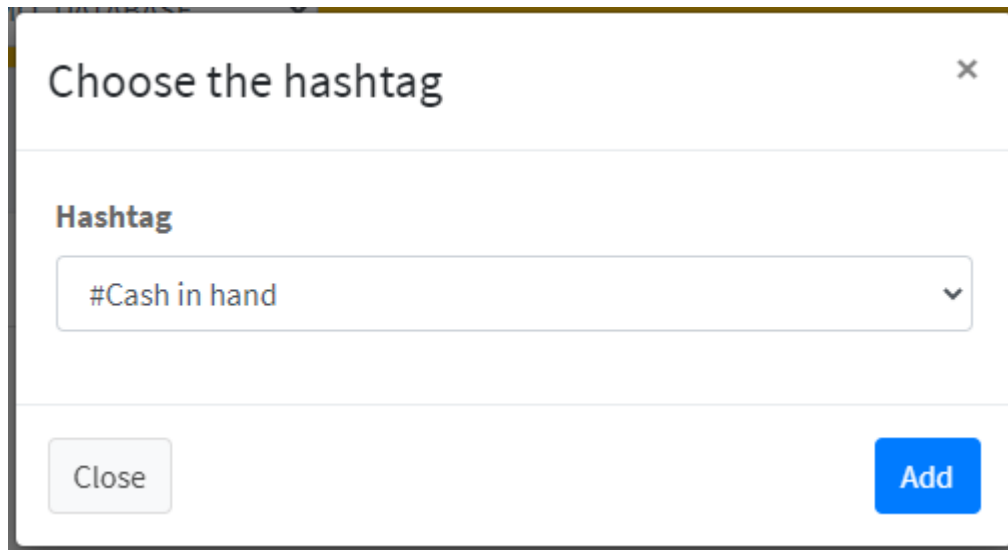
Add rule to this step Delete Step

Click + button between two step to create a new step in that position

2 default steps: Draft and Finished

2 default rules for each step: **s:Step Role** and **s:Status**

Click Add rule to this step button to add a hashtag to this step and set rule.

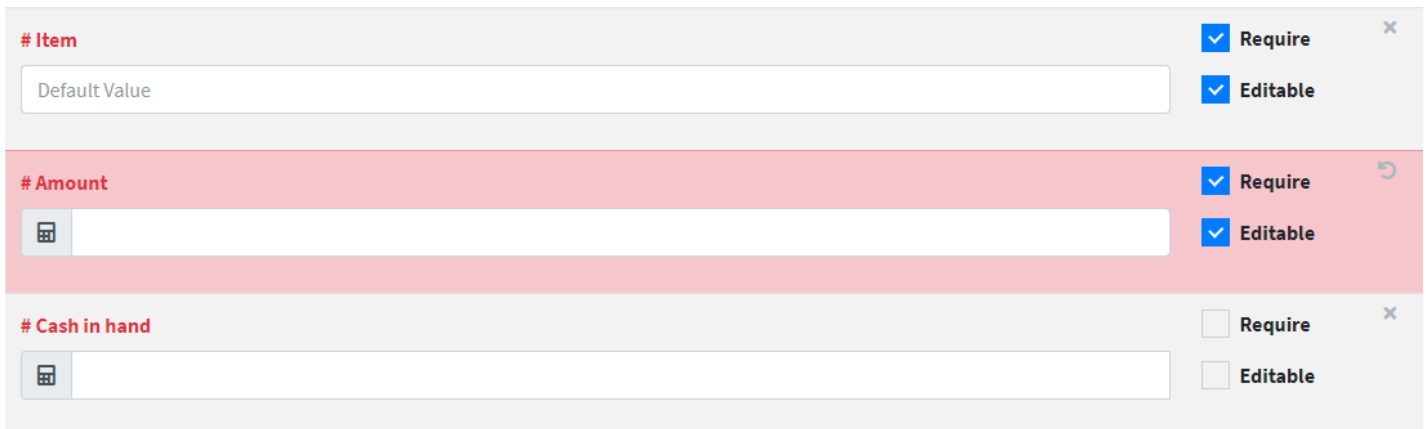


A modal dialog box titled "Choose the hashtag" with a close button (X) in the top right corner. Below the title is a section labeled "Hashtag" containing a dropdown menu with the selected option "#Cash in hand". At the bottom of the dialog are two buttons: a grey "Close" button on the left and a blue "Add" button on the right.

Chose the **hashtag** in select list then click **Add** button

Input value, check **Require** or **Editable** if that field required to editable in the step.

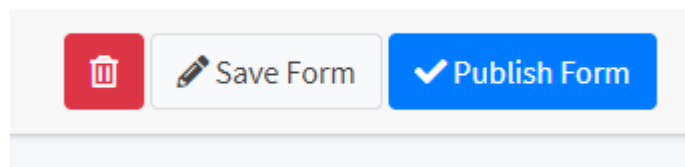
Click "Delete" button to delete rule or return



A configuration interface for form items. It consists of three rows, each representing an item. The first row is "# Item" with a text input field containing "Default Value", a checked "Require" checkbox, and a checked "Editable" checkbox. The second row is "# Amount" with a date input field, a checked "Require" checkbox, and a checked "Editable" checkbox. The third row is "# Cash in hand" with a date input field, an unchecked "Require" checkbox, and an unchecked "Editable" checkbox. Each row has a small "X" icon in the top right corner.

### Finish set up

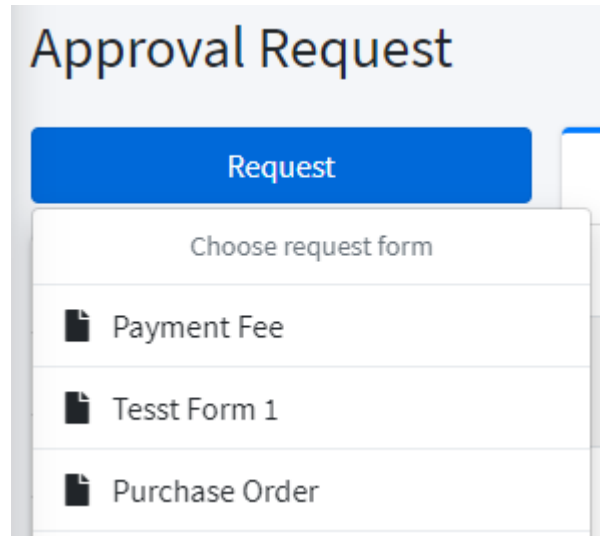
When done in preparation, you can click Save Form button that the form saved to update next time, not yet available for all members. Publish form to using for all members



A horizontal bar containing three buttons. From left to right: a red square button with a white trash can icon; a white button with a grey border containing a pencil icon and the text "Save Form"; and a blue button with a white checkmark icon and the text "Publish Form".

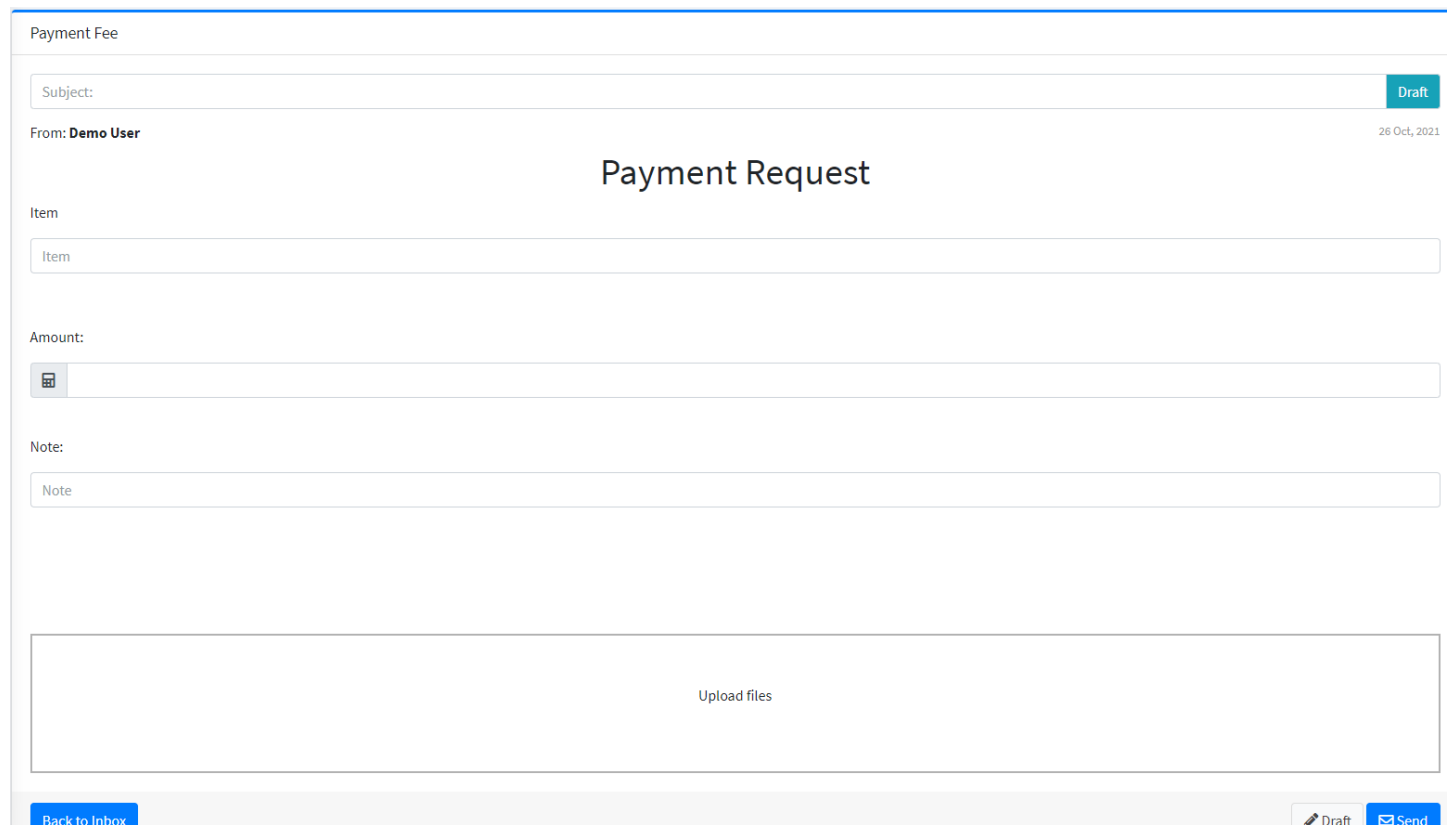
## SUBMIT THE REQUEST

To submit the request, in main page, click Request button



There is the list of forms depend on your permission, select one.

Input information that the form required. Upload attached file for reference. Then click Send

A screenshot of a web application form titled "Payment Fee". The form has a "Draft" status in the top right corner. The "From" field is set to "Demo User" and the date is "26 Oct, 2021". The main title of the form is "Payment Request". There are several input fields: "Subject:", "Item", "Amount:" (with a calendar icon), and "Note:". At the bottom, there is a large rectangular area labeled "Upload files". At the very bottom of the page, there are buttons for "Back to Inbox", "Draft", and "Send".



## APPROVE A REQUEST

On the list pending or approval in main page, select the request. Click Approve or Reject

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# Payment Request

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