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

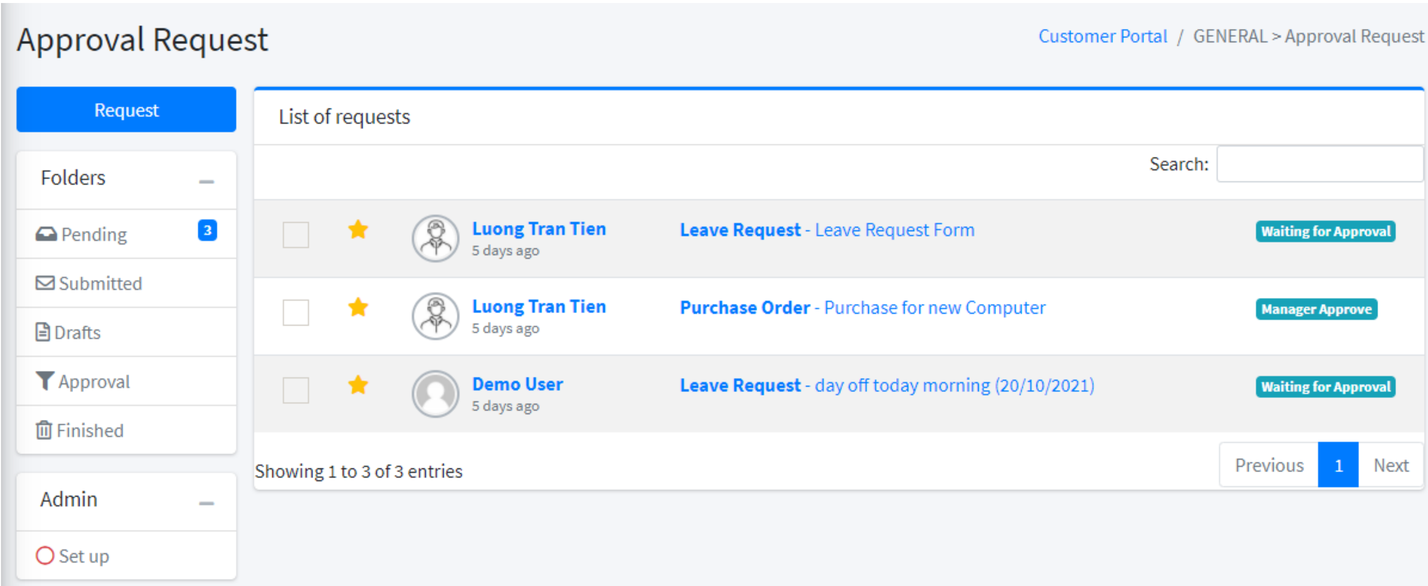
Enter your registered username or registered email address to login the system. You can tick the checkbox **Remember me** to access easier next time. If you don't have account, please contact us https://smartbooks.ssaudit.com/contact/ , we will check and feedback you later.

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.



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

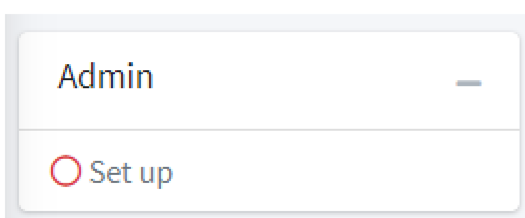
Admin - Set up

Create new form, template, set rule

CREATE A WORKFLOW RULE

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

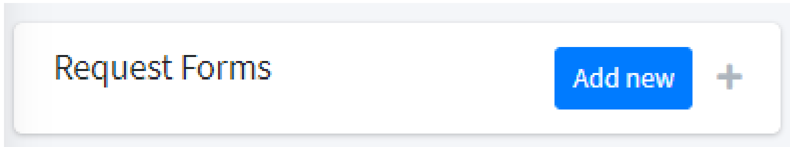
In Admin Card, Click Set Up



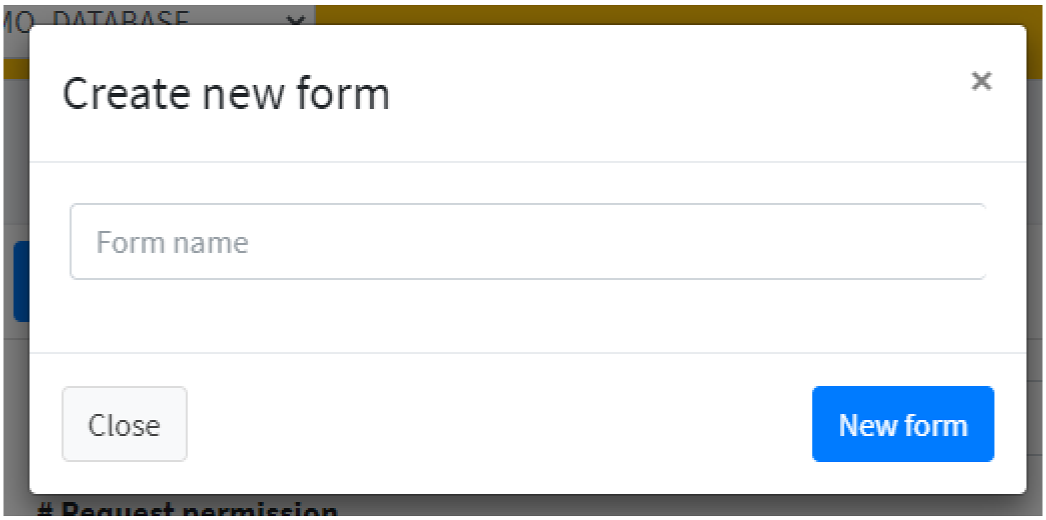
Create New Form

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

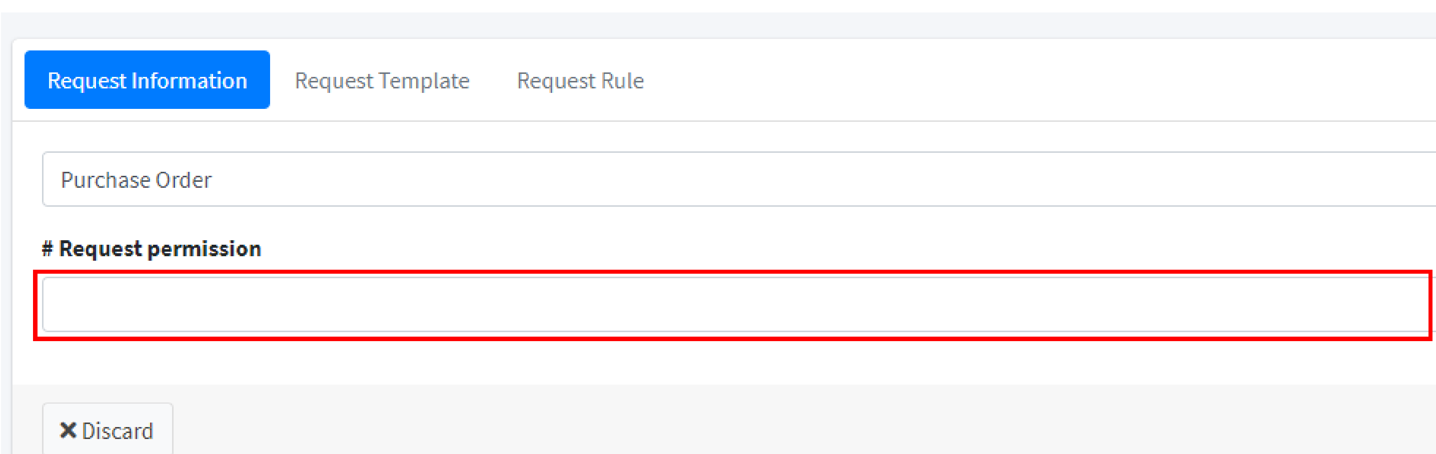


When form created, you can set the rule for the form

Set Form Permission

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

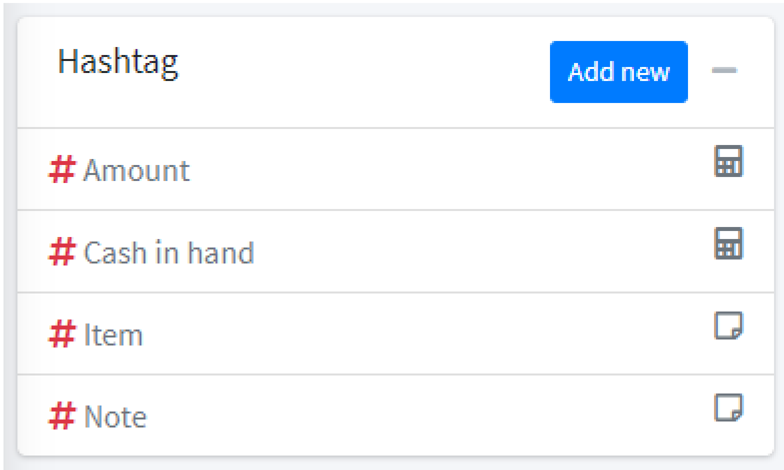
In **Request Information** tab, select the options in **Request permission**. This is a list of your company account, department, head of departments… Multiple choses are available.



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



Hashtag name: Name of the hashtag

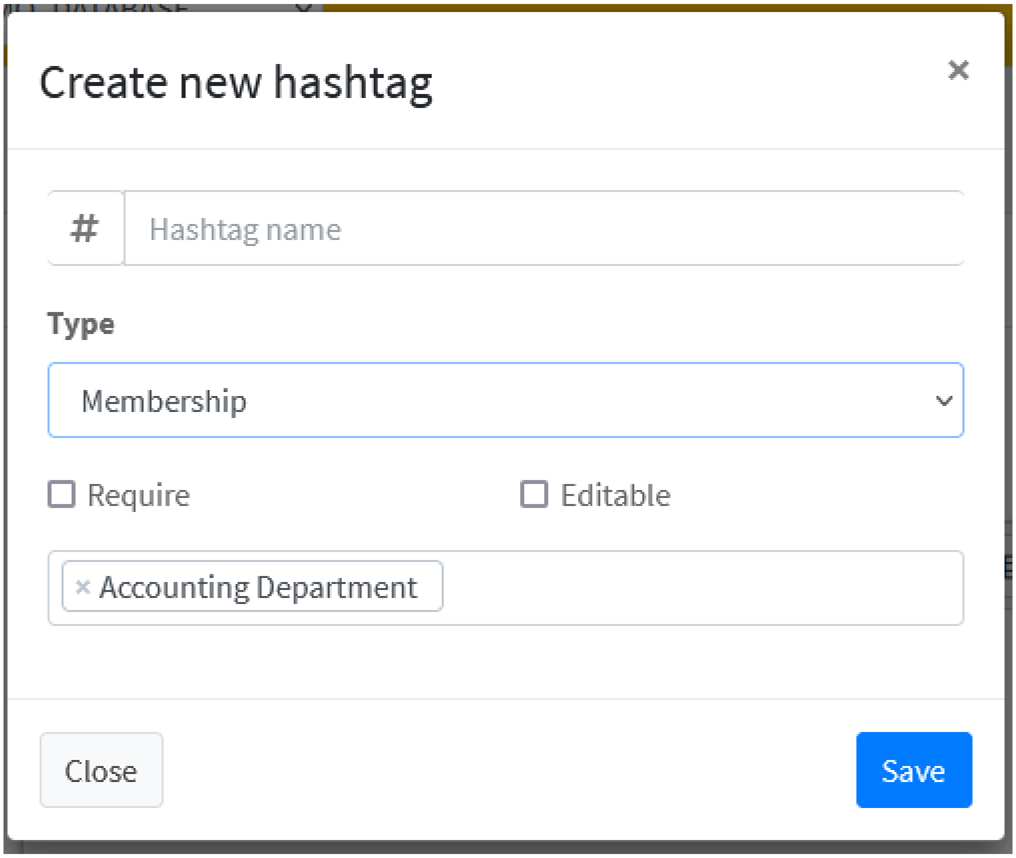
Type: Membership, Number, Text, DateTime, Option

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

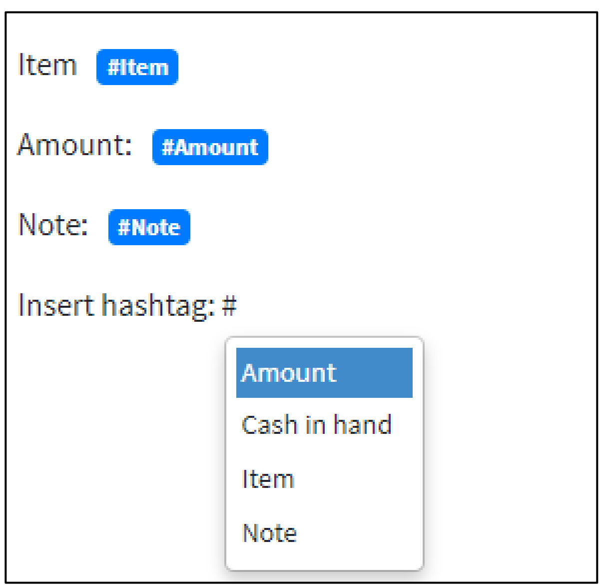
When finished, click **Save** button to submit form

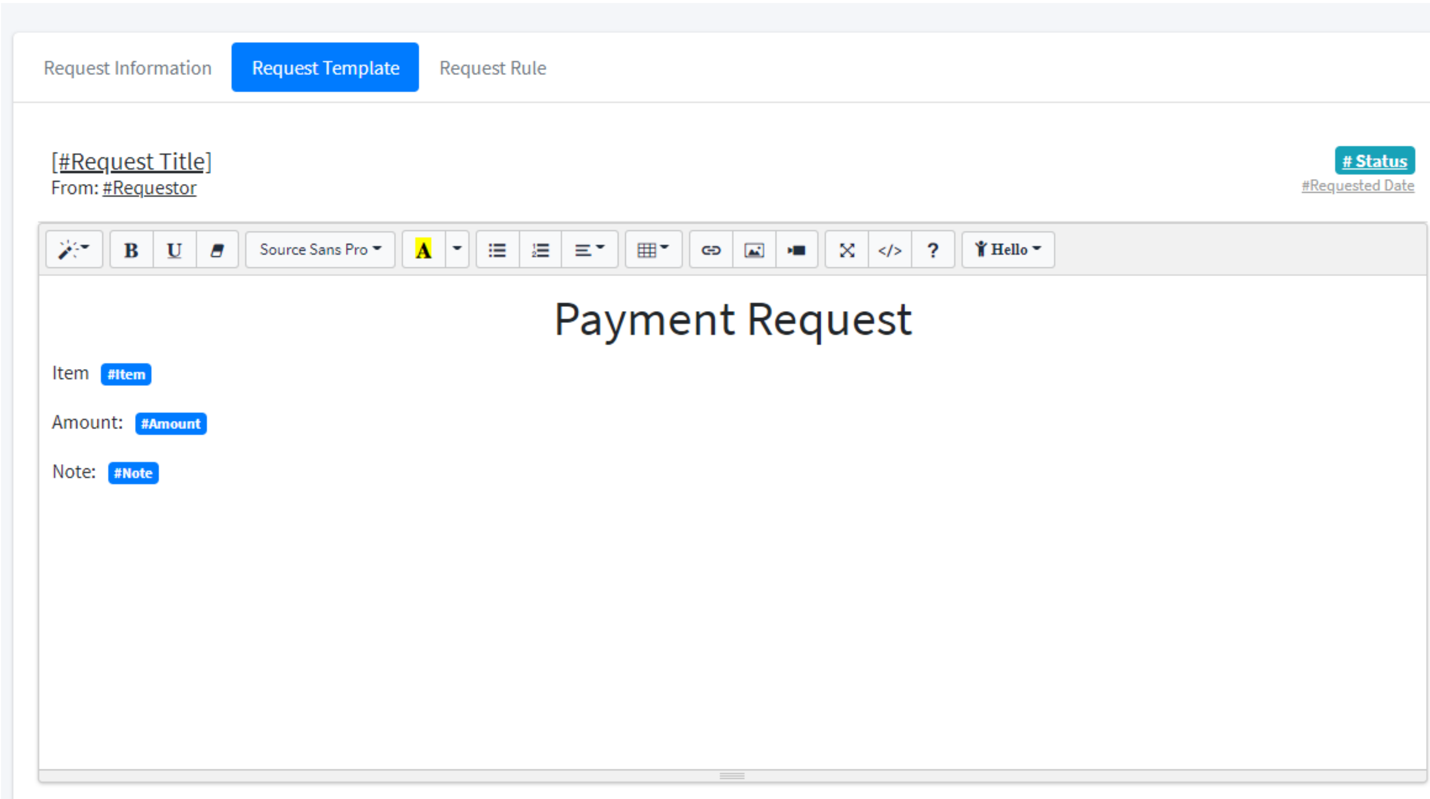


Design form template

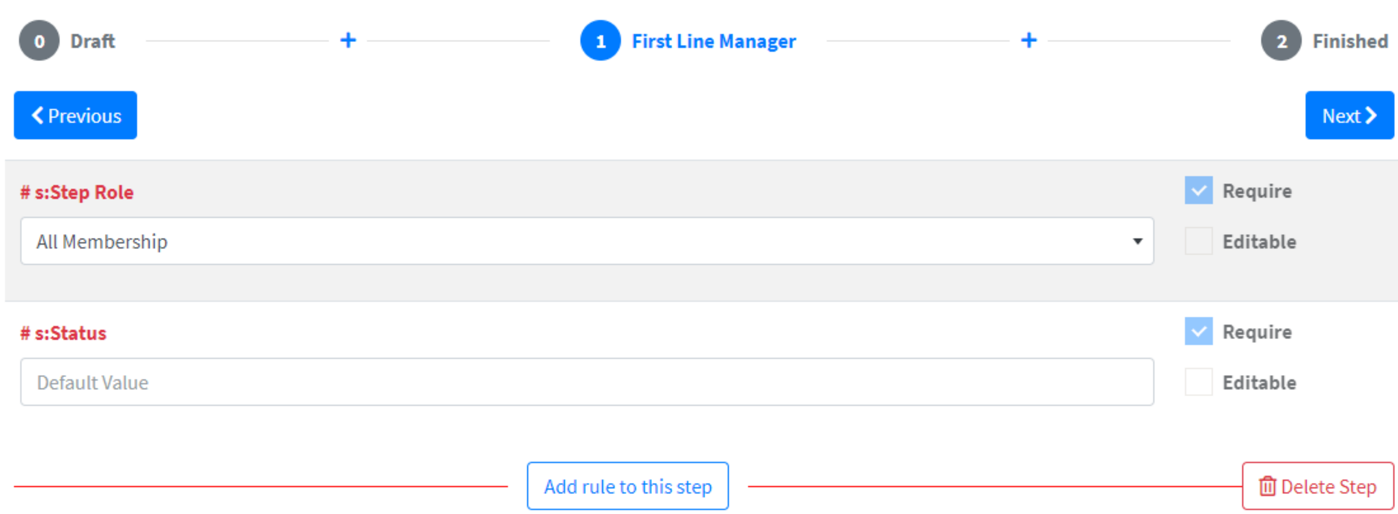
Design a template for the form

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





Set up the rule

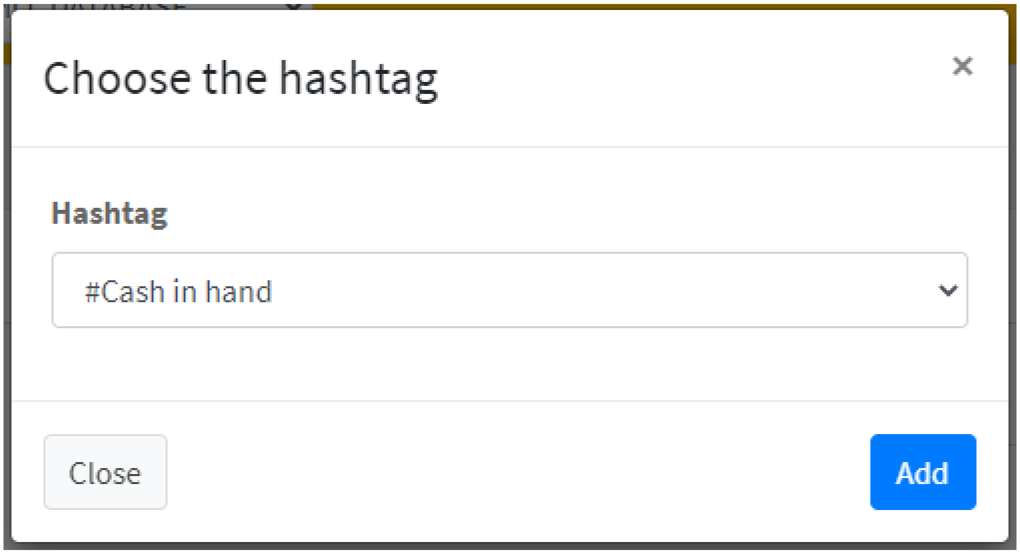


Click + button between two step to create a new step in that position

2 default steps: Draft and Finished

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

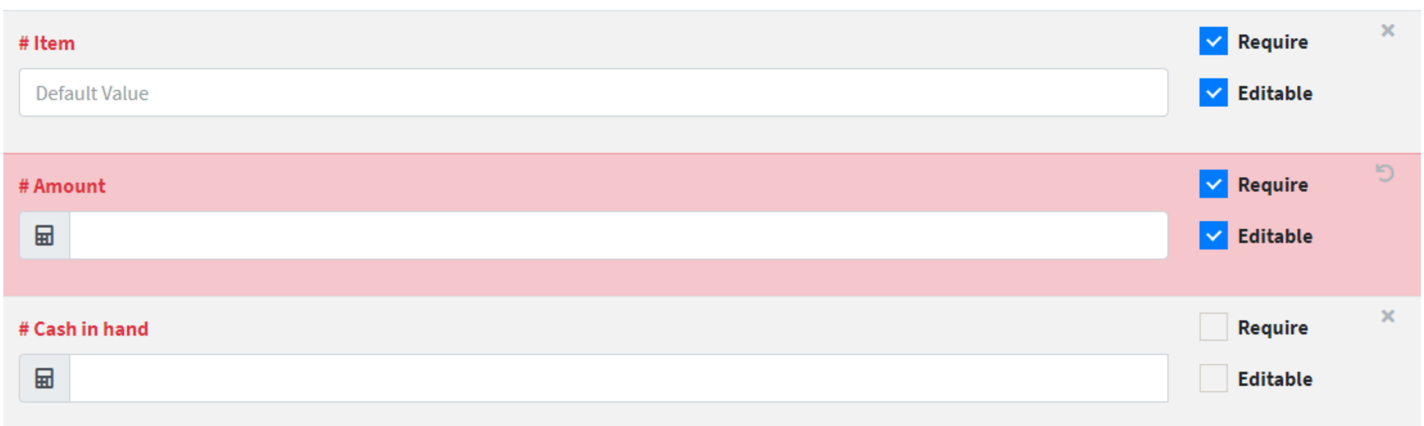
Click Add rule to this step button to add a hashtag to this step and set rule.



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

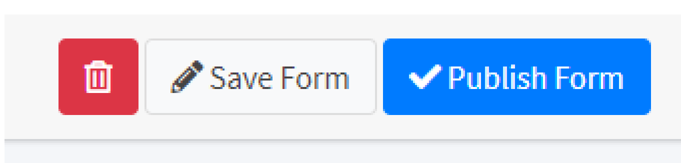
Input value, check **Require** or **Editable** if that field required to editable in the step.

Click “Delete” button to delete rule or return



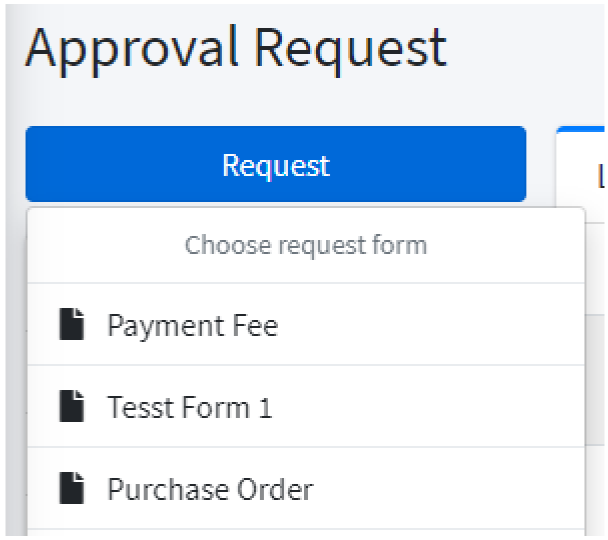
Finish set up

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



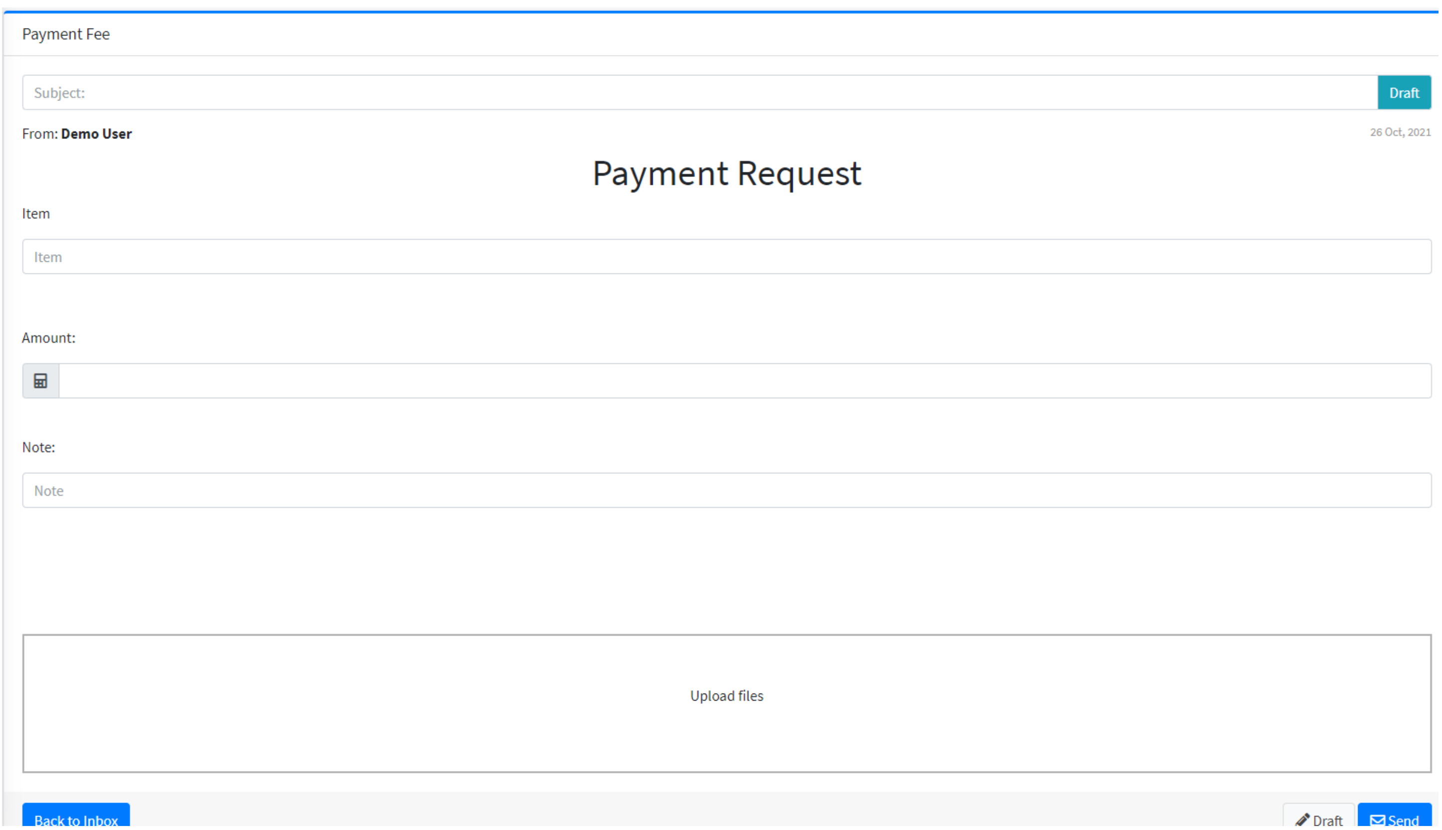
SUBMIT THE REQUEST

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



APPROVE A REQUEST

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

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