



## MY ITEMS TO APPROVE

### SETUP INSTRUCTIONS

1. Ensure the latest versions of the Salesforce CPQ & Advanced Approvals packages are installed
2. Install the My Items to Approve Package for all users
3. On the sbaa\_\_Approver\_\_c object, add a custom text formula field:
  - Label: 18 Digit Group Id
  - API Name: X18\_Digit\_Group\_Id\_\_c
  - Formula: CASESAFEID(sbaa\_\_GroupId\_\_c)
4. On the sbaa\_\_Approval\_\_c object, create a field set
  - Take note of the field set's API Name
5. Add the AXIA Advanced Approvals Lightning Component to a Lightning Page
  - Add a Title
  - Enter API name of the field set you created in Step 4

### SETUP INSTRUCTIONS - MOBILE

1. If necessary, create another field set with a maximum of 3 fields
  - Typically these include Approval # and Quote #
2. Create a Tab and add the Lightning Component
3. Make the Tab visible via Mobile configuration settings