

Approval Central Installation and User Guide

Introduction

Approval Central puts all your pending approvals in one place inside the Salesforce1 mobile app, making business decisions a snap. All of the relevant information you need to make an approval decision is now one tap away.

Benefits:

- Instant Visibility: Consolidated view of all pending approvals inside Salesforce1
- Save Time: No more searching for approvals, they are all in one place
- One Click Action: Make approval decisions on the go

Approval Central is perfect for executives with little time and managers on the go. By seeing all pending approvals in the left-nav (aka Navigation menu) of the Salesforce1 mobile app, business decisions are easy to prioritize and make on the go. Whether a big deal needs approval or a member of your team needs to schedule their time off, Approval Central consolidates all of your pending approvals into one place. And this works seamlessly across all Salesforce1 compatible devices including iOS and Android.

Installation instructions

1. Install the unmanaged package for Approval Central into your Production or Sandbox Organization.
2. When installing the package, select 'Grant access to all users' if you'd like to allow all users in your Org to access the app.

If you'd prefer to grant access to Approval Central for a subset of users, choose 'Select security settings'. You can then select which user profiles can access the app.

You can also control app visibility/access at a later point by controlling which user profiles have access to the "My Approvals" Visualforce Tab included in the app package.

3. **Important:** Enable Approval Central in Salesforce1 left-nav (aka Navigation Menu).

Once Approval Central is installed, a new Visualforce tab named "My Approvals" is automatically added to the organization. If you'd like users of Salesforce1 to have access to Approval Central, you'll need to manually add the menu item to the mobile configuration:

- a. From Setup, click **Mobile Administration --> Mobile Navigation**.
- b. Add the "My Approvals" menu item to the list of selected menu items.

Adding the menu item immediately enables it on Salesforce1 for all users who have access to the "My Approvals" Visualforce Tab.

User Guide

Approval Central has a very simple and intuitive user interface that makes it easy for users to view and manage all their pending approvals from the Salesforce1 mobile app.

Users can access Approval Central by clicking on "My Approvals" in the left-nav (aka Navigation Menu) of Salesforce1. They will then be presented with their list of pending approval requests. For each pending approval request, the app displays the record name, submitter's name and chatter profile picture and submission date. The approval requests are grouped by record type - i.e. all approval requests related to Opportunities, Quotes etc. are grouped together.

The user can click on any pending approval request to be taken to the standard Salesforce1 screen for approving or rejecting an approval request.

Important: Once a user approves or rejects an approval request and navigates back to the Approval Central app (via the ← arrow on the top left corner of Salesforce1), they will need to tap the refresh icon in order to update their list of pending approvals.