

APPROVAL PROCESS REMINDER APP

Send Approval Reminder Emails

USER MANUAL



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Approval Process Reminder App

Overview

Approval process reminder is an App. This app is useful in sending the approval reminder emails for all pending approval process. This app is helpful in sending the three reminder emails to user based on the number of days entered for first, second and third reminder for all pending items in the org .

This app is accessible to admins of Salesforce Org only.

Key Features

- Send reminder emails for all pending approval processes.
- It will send reminder emails only three times based on the number of days entered for first, second and third reminder.
- It will send reminder emails at a fixed time of the day entered by user itself in the configuration settings.

Configuration & Admin Settings

Since this app is sending three reminder emails at a fixed time of the day based on the number of days and time entered by user in the settings.

User needs to do one time settings to send approval reminder emails.

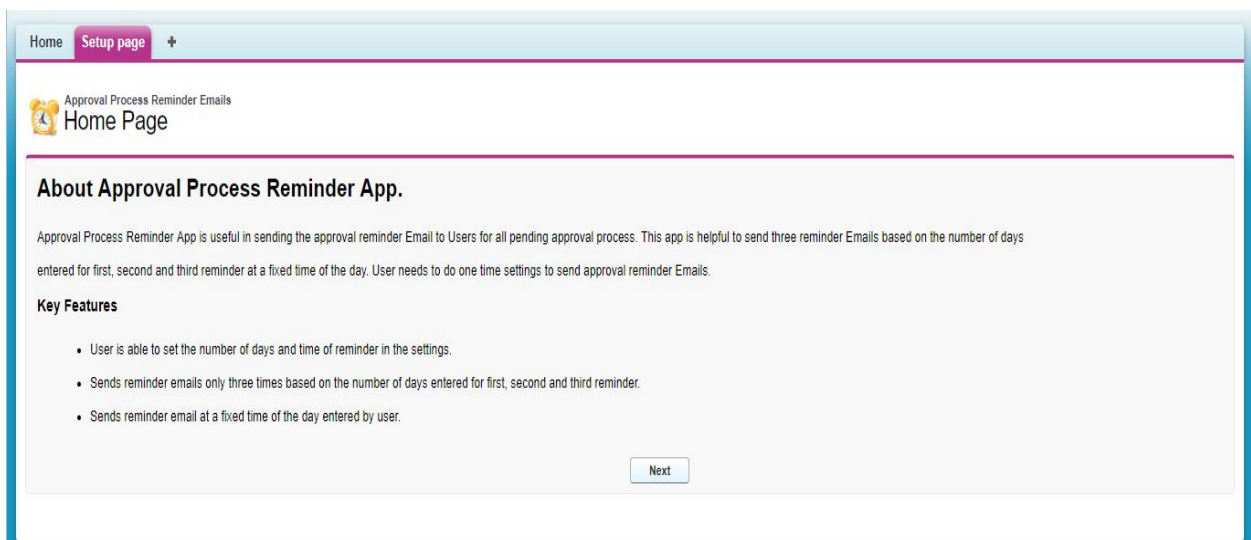
Steps to add settings:

- First go to the approval process reminder app.
- click on the setup page tab.
- Read introduction of the approval process reminder app.
- Click next to go to next page and fill the approval reminder settings details.
- Fill number of days for first, second & third reminder and time of the reminder.
- Number of days for first reminder should be less than number of days for second & third reminder.

- Time should be entered in 24 hours format.
- If you want to cc yourself in all mails, you can add the email address in the optional cc list.
- User can edit the settings data whenever he wants to edit but user need to abort the already running job after update the settings data and schedule the batch again.

Approval process reminder setup process

- **Introduction :** This is the homepage of Approval process reminder app which explains about the app and its features. Click on next button to fill the Approval reminder settings.



- **Configuration Setting page :** User needs to fill Approval reminder settings before proceeding further. User need to enter number of days for first, second & third reminder and time of the day when user want to receive the reminder emails. User can also enter one optional Email address who should receive the reminder Emails. After entering data click on save & next button to save the data and move to next page.

Home
Setup page
+


Approval Process Reminder Emails
Home Page

Note: You need to do following one time settings :

- First three fields decide days to send reminders.
- Fourth field decides time of reminder.
- Last field specifies one CC address who should get the approval Email.
- Some default values are filled for the following fields, you can change these values according to your need.

Approval Process Reminder Settings

Days after which 1st reminder will be sent :	0
Days after which 2nd reminder will be sent :	14
Days after which 3rd reminder will be sent :	21
Time of the day when the reminder mails should be sent :	05:00
Email Address for CC list for all reminder mails (Optional) :	

Back
Save & Next

- Check What you entered in configuration settings :** This page shows you information entered in the configuration settings. You can edit your data by clicking on edit button.

Home
Setup page
+


Approval Process Reminder Emails
Home Page

Approval Process Reminder Settings

Days after which 1st reminder will be sent :	7
Days after which 2nd reminder will be sent :	14
Days after which 3rd reminder will be sent :	21
Time of the day when the reminder mails should be sent :	05:00
Email Address for CC list for all reminder mails (Optional) :	

Back
Edit
Next

- **Edit Reminder Setting data :** If user wants to edit the Approval reminder setting data, user need to click on edit button & save the changes by click on update button. If user edit the settings data when there is already a job running than user needs to abort the previous job and schedule the job again with new settings data.

Home Setup page +

Approval Process Reminder Emails
Home Page

Note: You need to do following one time settings :

- First three fields decides days to send reminders.
- Fourth field decides time of reminder.
- Last field specifies one CC address who should get the approval Email.

Approval Process Reminder Settings

Days after which 1st reminder will be sent :

Days after which 2st reminder will be sent :

Days after which 3st reminder will be sent :

Time of the day when the reminder mails should be sent :

Email Address for CC list for all reminder mails (Optional) :

When already a job running & user edit the settings data following screen displays to the user.

Home Setup page +

Approval Process Reminder Emails
Home Page

You have changed the settings, Please go to last page to schedule with new settings.

Approval Process Reminder Settings

Days after which 1st reminder will be sent : 3

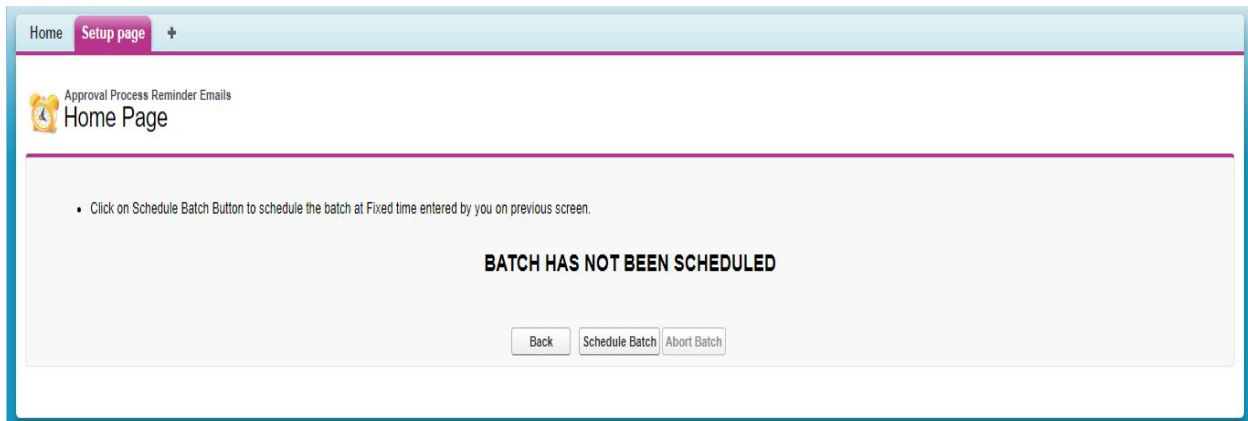
Days after which 2nd reminder will be sent : 4

Days after which 3rd reminder will be sent : 22

Time of the day when the reminder mails should be sent : 23:00

Email Address for CC list for all reminder mails (Optional) :

- **Schedule Batch** : User needs to click on schedule batch button to schedule the batch at a fixed time of the day entered by user in the reminder settings.
If you want to abort the running job, user needs to click on Abort job button.



After user clicks on schedule batch button this screen appears which contain list of scheduled jobs and their related information.

