Approval Manager
POWERED BY Algoworks
salesforce

# APPROVAL MANAGER APP USER GUIDE

Introduction
Setup
Configuration
App Installation
Custom Settings

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# INTRODUCTION

Approval Manager app is designed to collect all approvals records (whether it is pending, approved or rejected) at one place. We can approve or reject the pending approvals records from here. This User Guide demonstrates 3 Environments in salesforce: Classic Mode, Lightning Mode & Mobile App.

- Easily manageable custom selection
- Simplistic implementation to save your time
- Easy to Filter & Access records that needs “Approval” or “Rejection”

# LOGIN INTO THE ENVIRONMENT - FRONT END

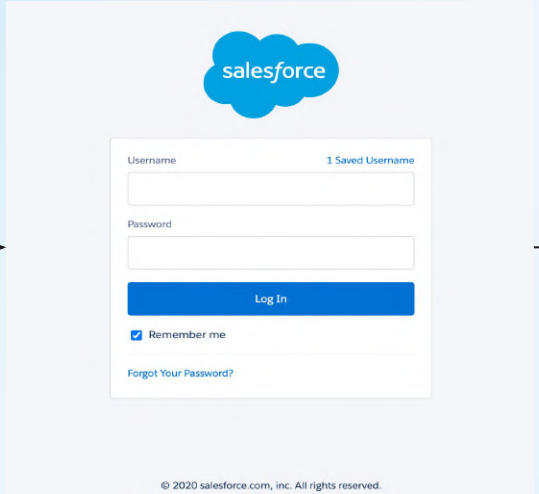
To begin, the user must login to their salesforce org.
Once the user is logged in the following dashboard appears.

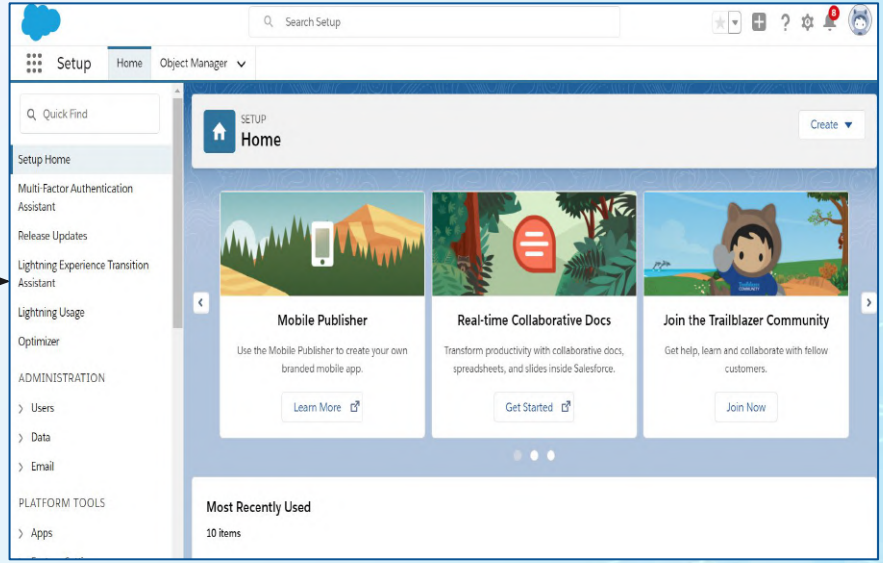
Fill in the user credentials.

User name (Case sensitive)

Password (Case sensitive)

Click on login.



# Part 1:
## Install & Configure

### Install The Managed Package In Your Org

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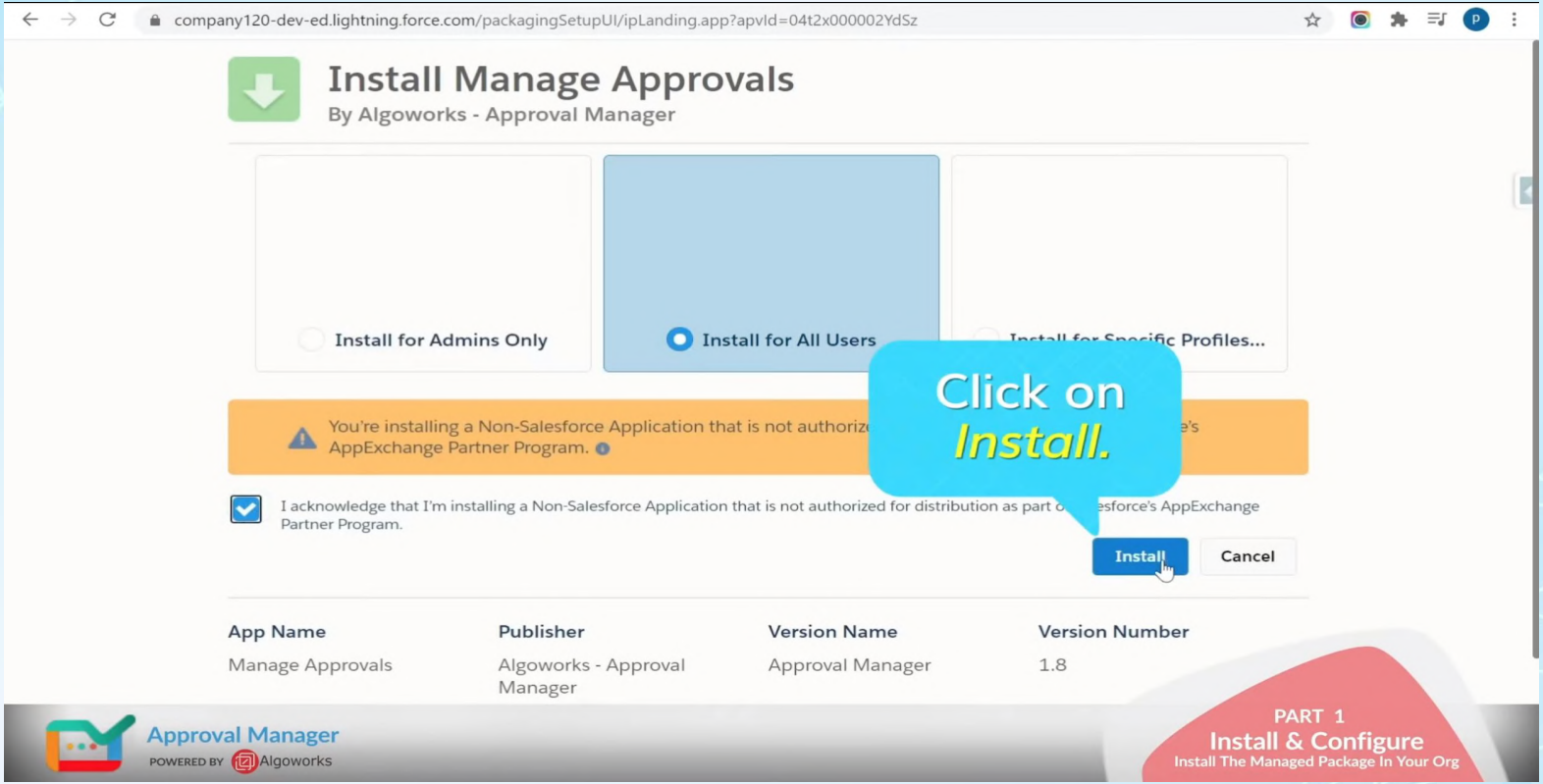
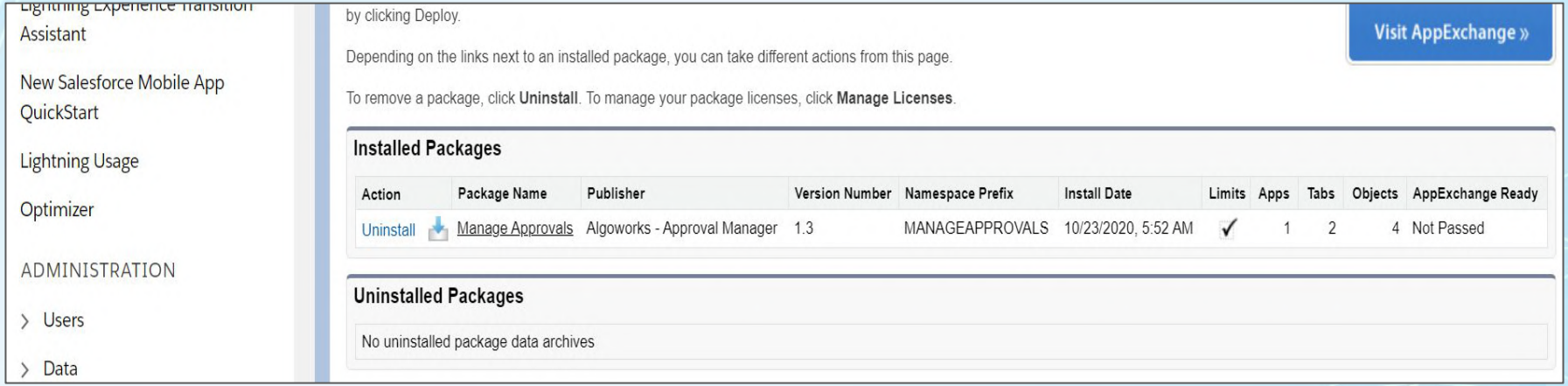
# INSTALL THE APPEXCHANGE APP IN THE ORG



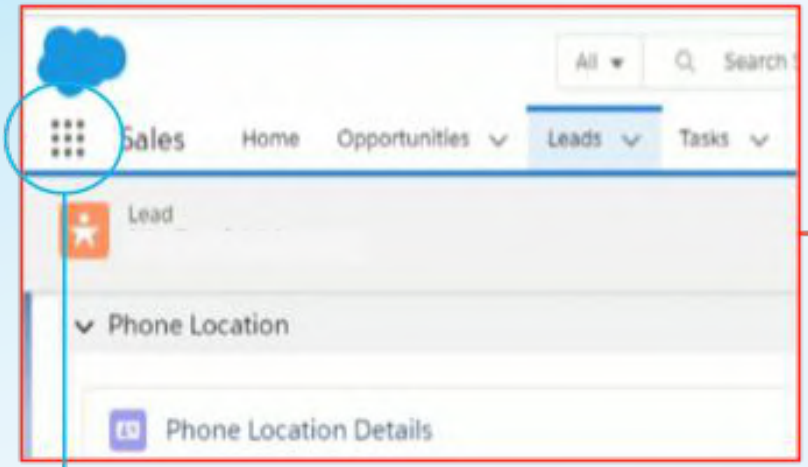
# POST - INSTALLATION STEPS

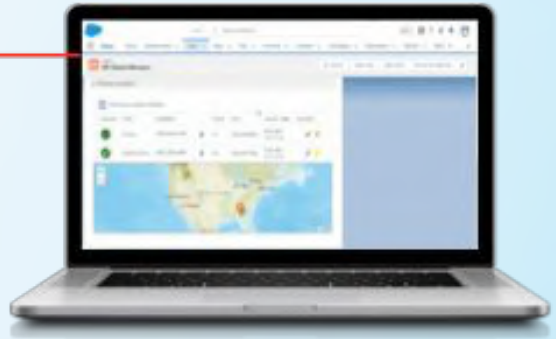
After the Installation completed successfully. We can check the Installed package to follow below step

**SetUp → Enter Installed Package in Quick Find Box → select Installed Package.**



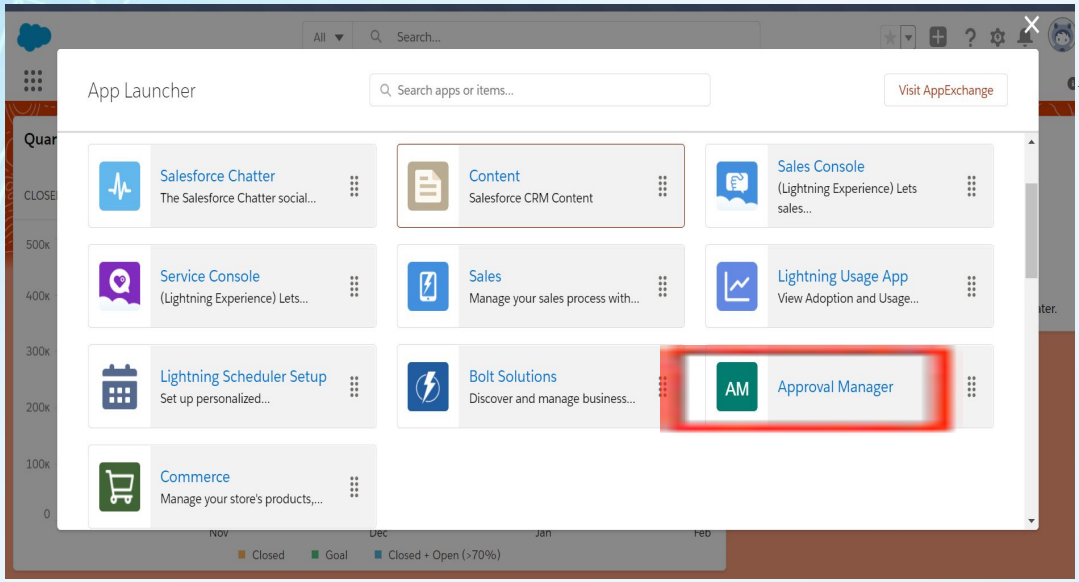
# POST - INSTALLATION STEPS



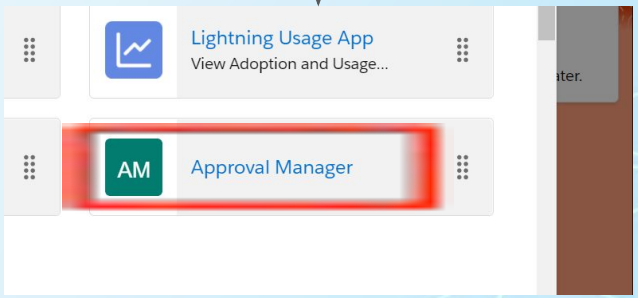



Click “App Launcher” - a grid of nine dots at the top left - to open the App Launcher box.

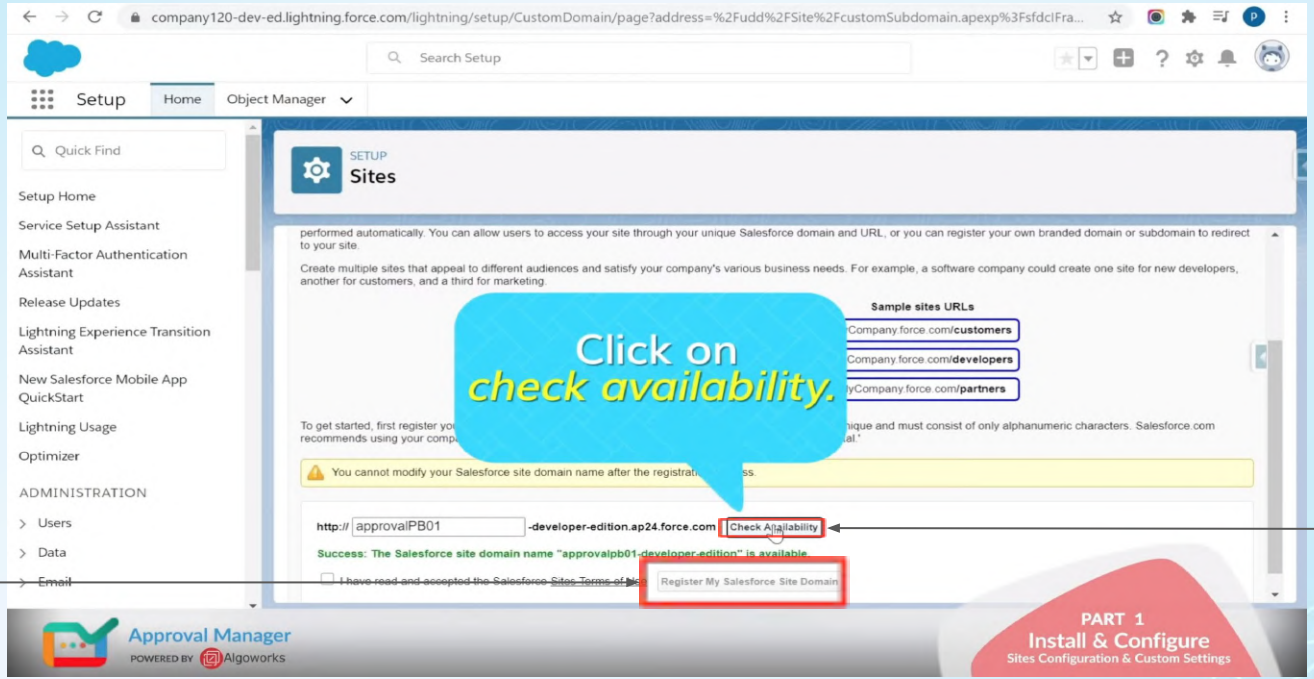
# POST - INSTALLATION STEPS




In the App Launcher Click on Application Manager App



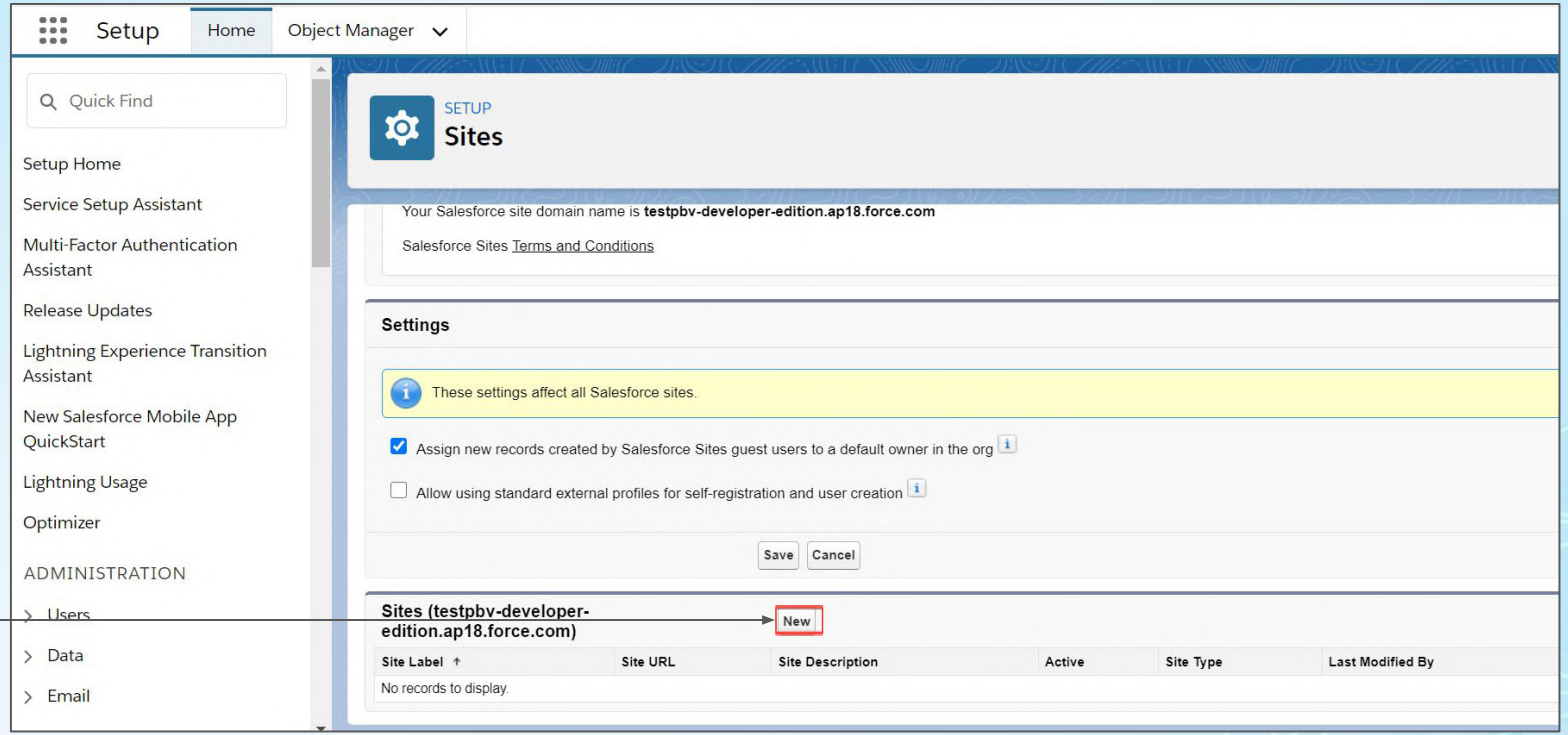
# SITE CONFIGURATION




Once the Domain name is available, Check the box and Click on Register my Salesforce site domain

Enter the Domain name and Check for the Availability.

# POST - SITE CONFIGURATION



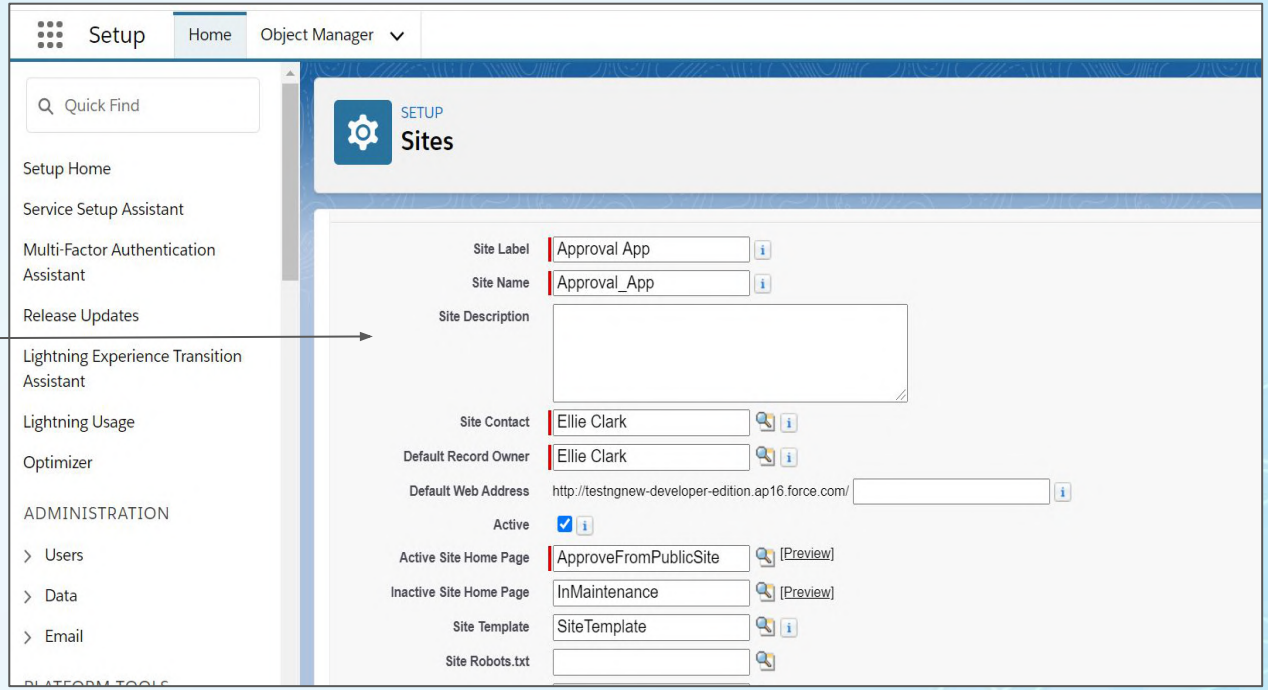

Post Registration Click on **"New"** on the redirected page

# POST - SITE CONFIGURATION

Fill in the Following Mandatory Fields:

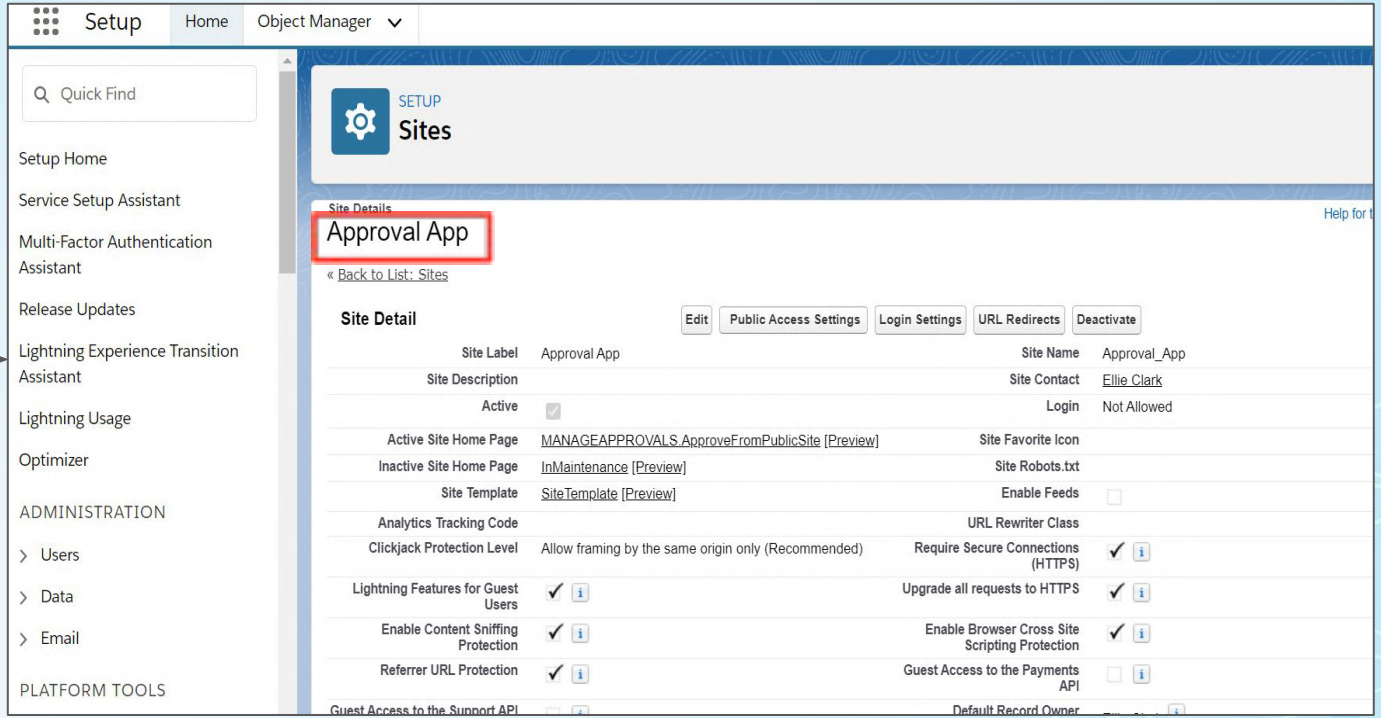
- Site label
- Site Name
- Site Contact
- Default Record Owner
- Active Site Homepage
- Clickjack Protection Level

Click on Save.

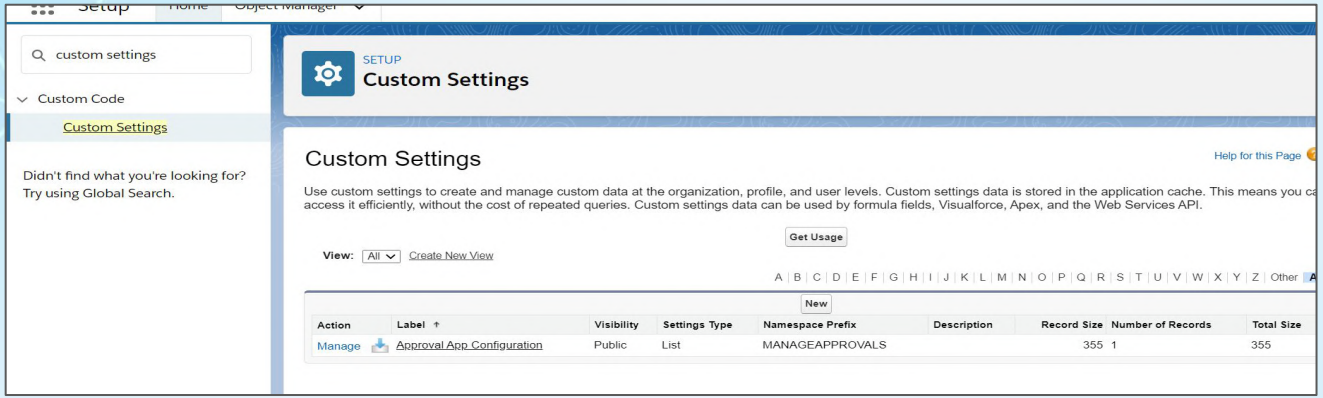


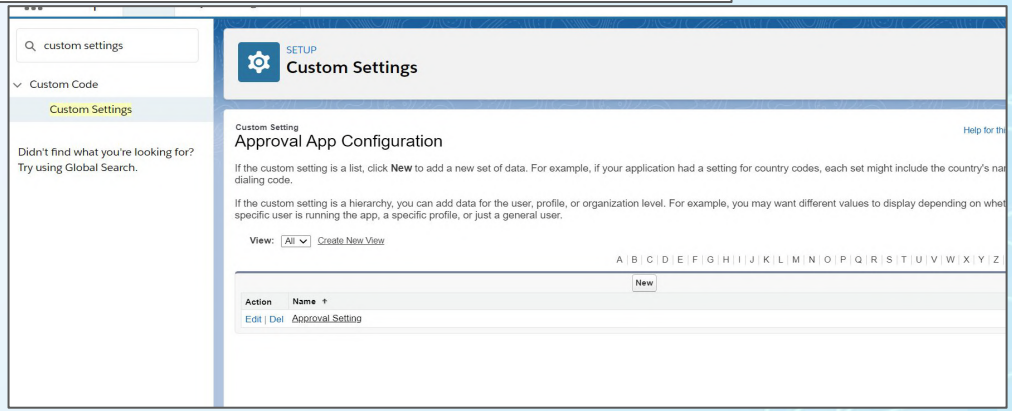
# POST - SITE CONFIGURATION

Now the Site has been Configured

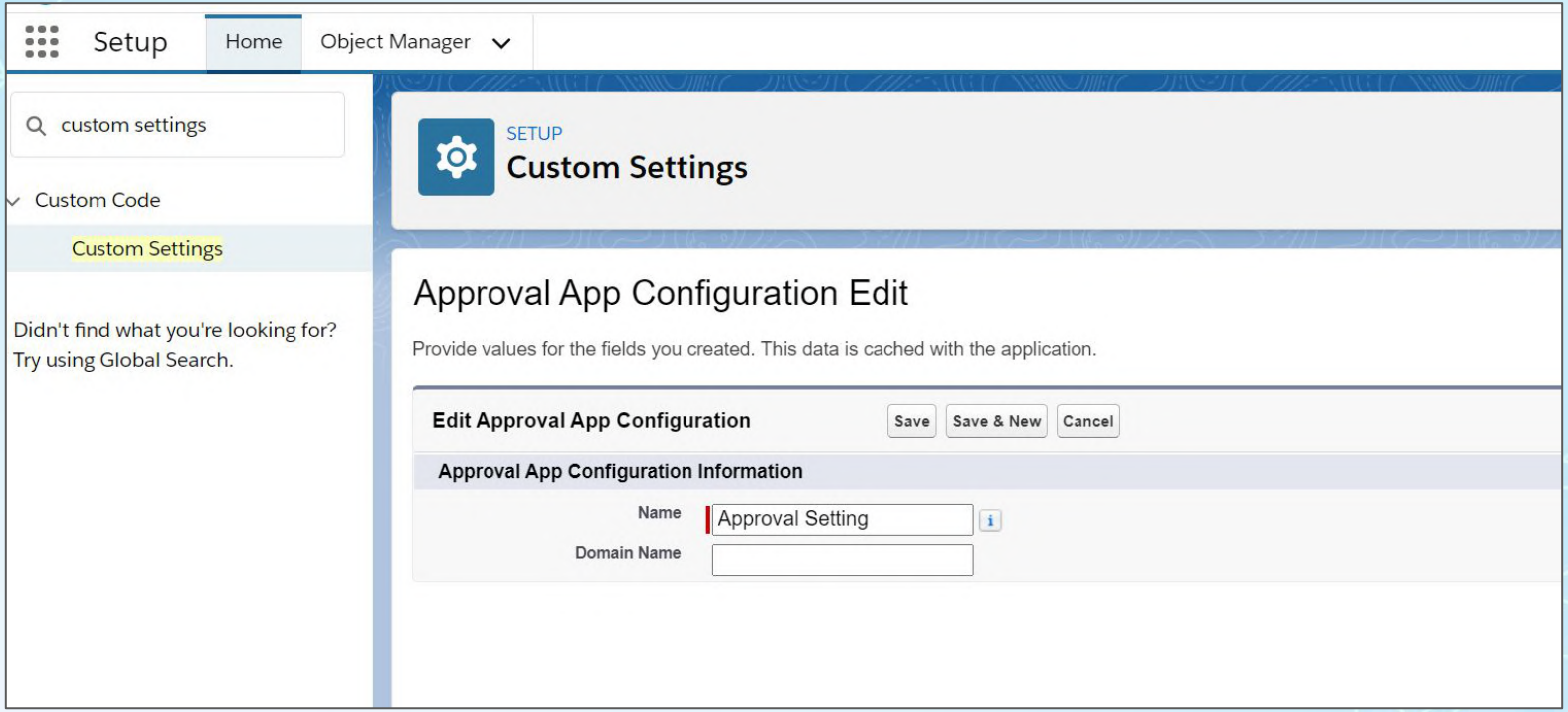


# CUSTOM SETTINGS

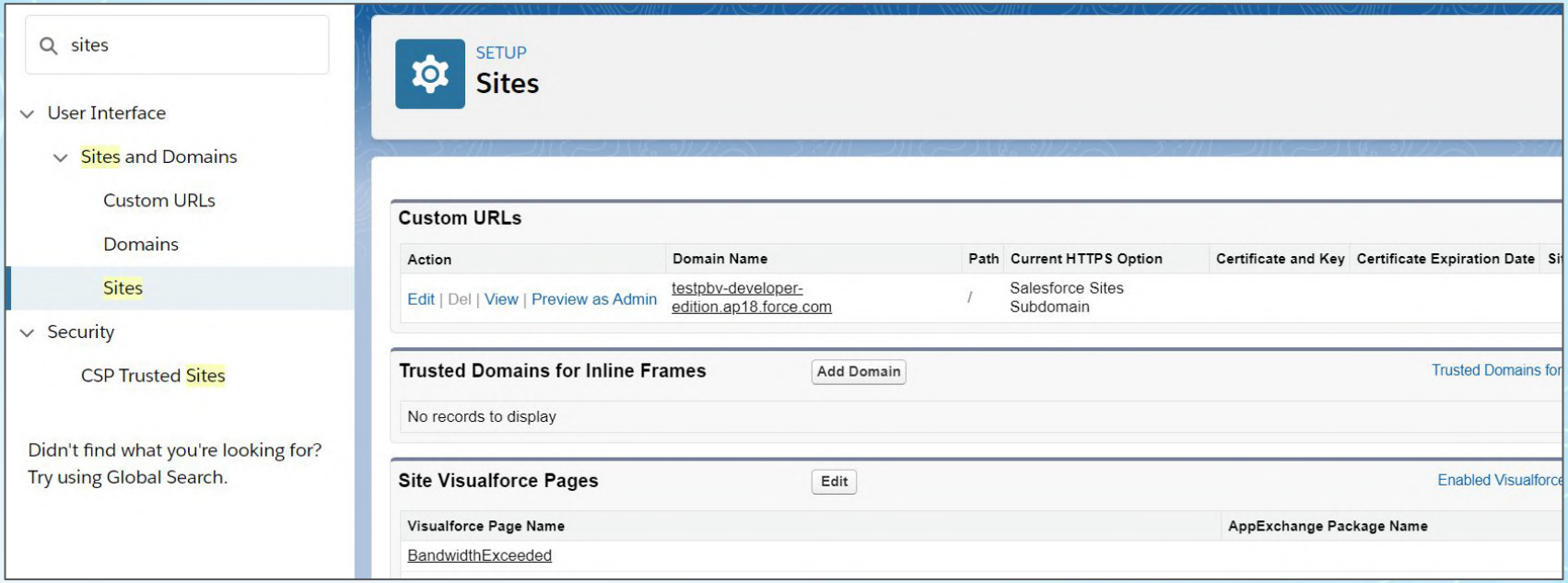


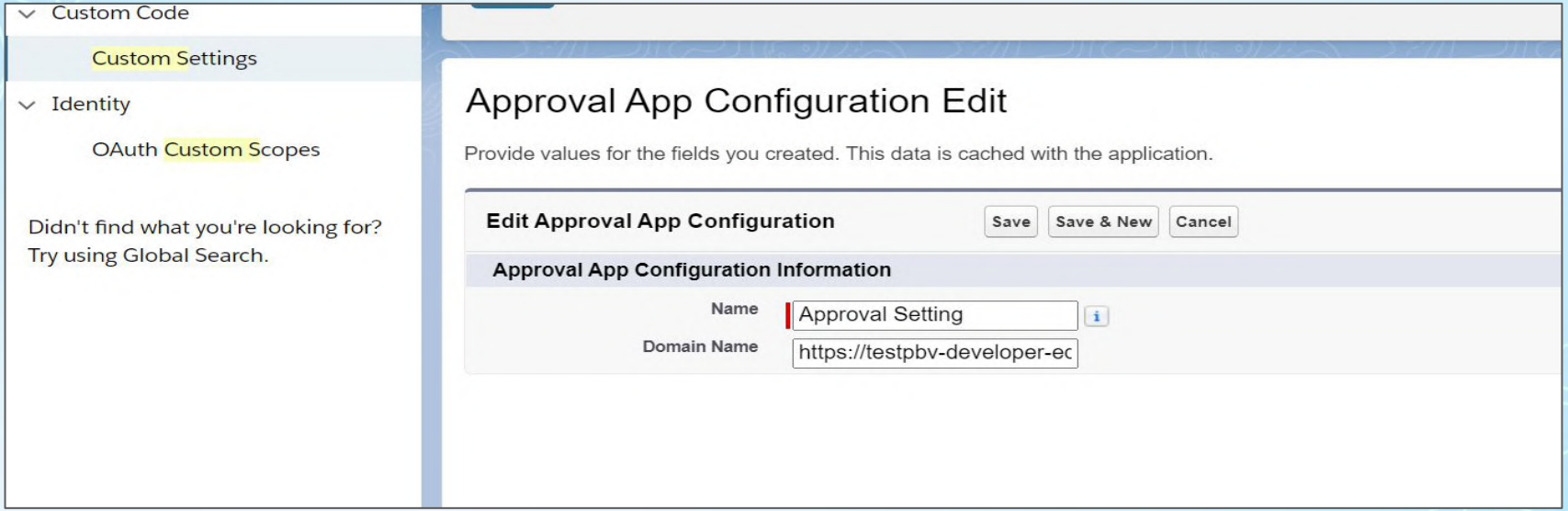
# CUSTOM SETTINGS



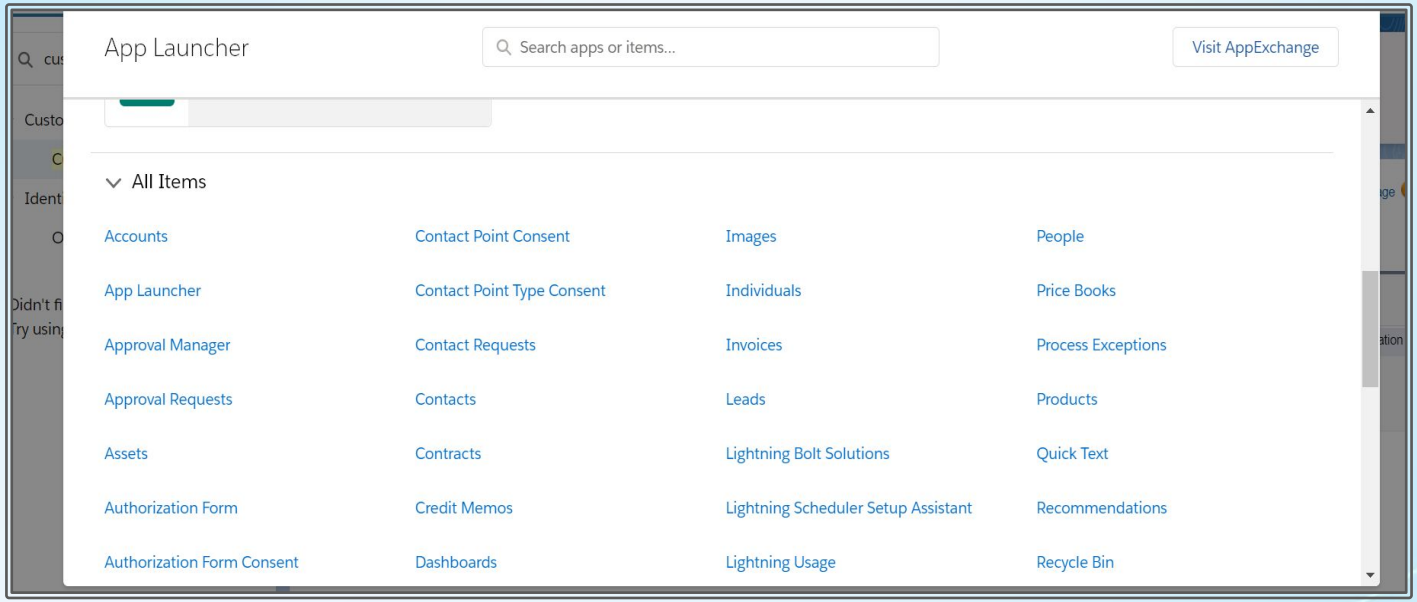
# CUSTOM SETTINGS



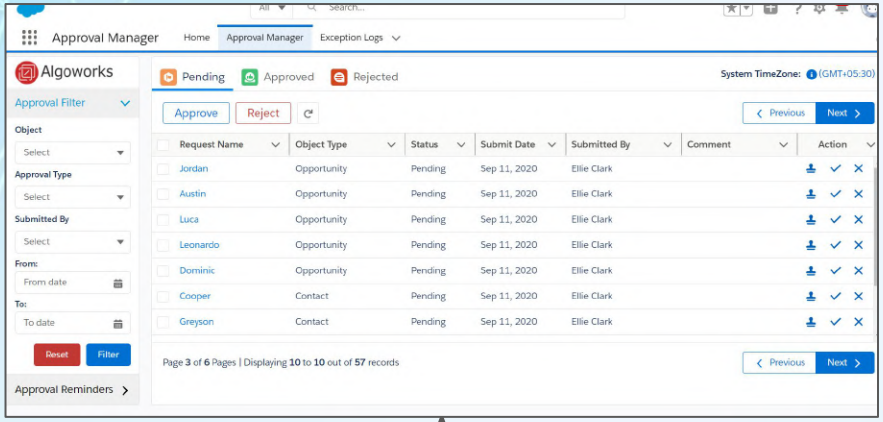
# APPROVAL APP CONFIGURATION EDIT



# APPROVAL MANAGER - APP

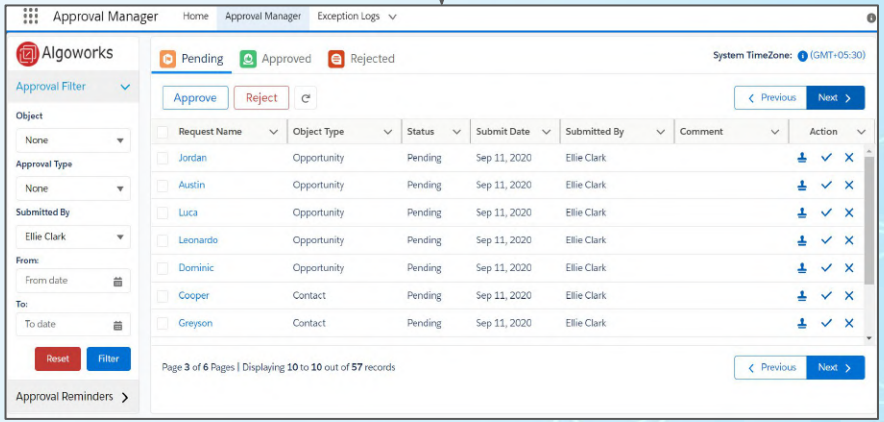


# APPROVAL MANAGER - APP




Approval Manager – Without Filters

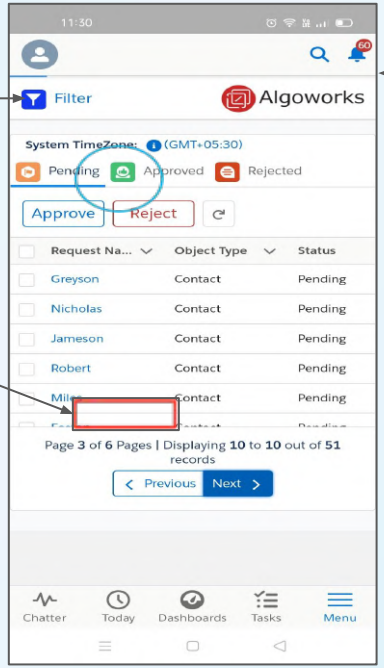
Approval Manager – With Filters



# APPROVAL MANAGER - APP - MOBILE APP

Filter Option lets the user “Filter” the Records

Records That could be Filtered




Home page of the Approval Manager Mobile App

# Part 2:

## Approve/Reject Single Records

## Approve Single Records

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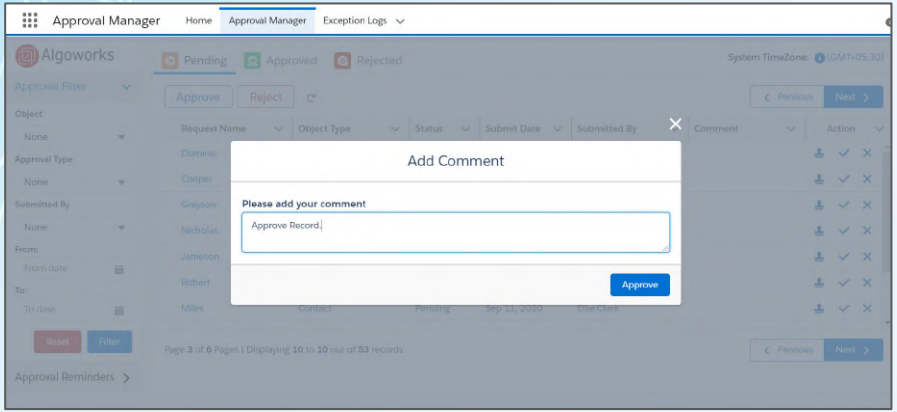
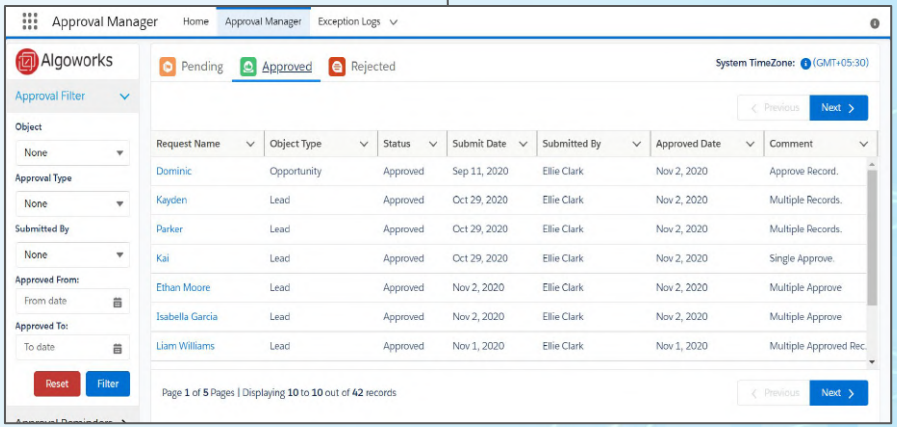
# FILTERING BY SINGLE APPROVAL



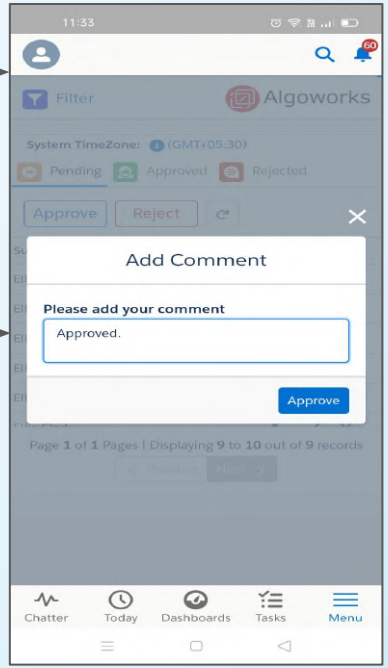

This will Help the user to filter Records by Single Approve and a user can view & Perform actions on the Approval history in the Lightning Mode



# FILTERING BY SINGLE APPROVE - MOBILE APP

Single Approve Filter

This will Help the user to filter Records by Single Approve and a user can view & Perform actions on the Approval history in the mobile app



# Part 2:

## Approve/Reject Single Records

## Reject Single Records

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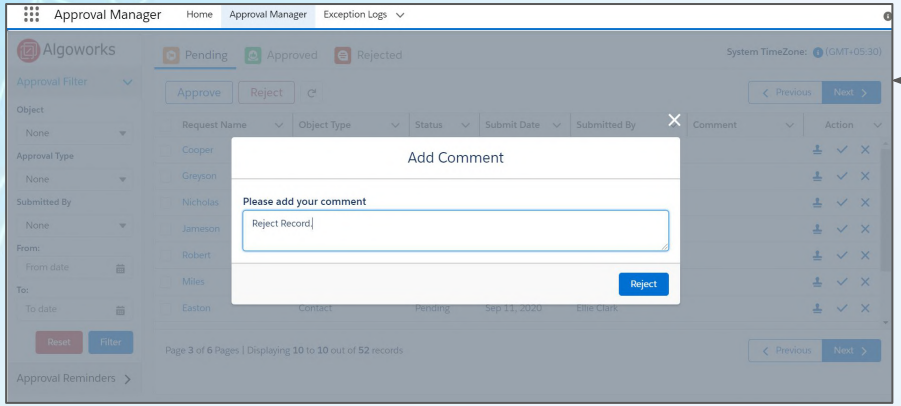
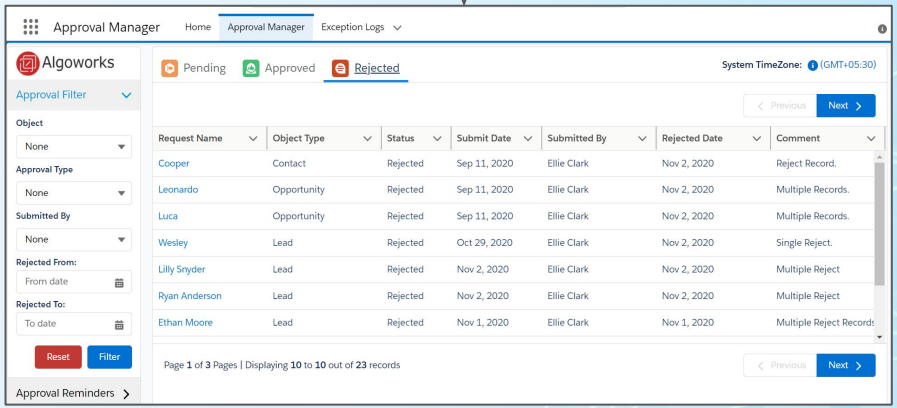
# FILTERING BY SINGLE REJECT



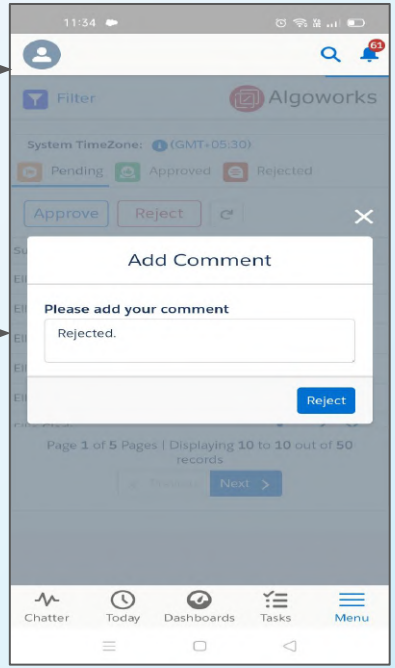

This will Help the user to filter Records by Single Reject and a user can view & Perform actions on the Approval history in the Lightning Mode



# FILTERING BY SINGLE REJECT - MOBILE APP

Single Reject Filter

This will Help the user to filter Records by Single Reject and a user can view & Perform actions on the Approval history in the Mobile App



# Part 3:

## Approve/Reject Multiple Records

### Approve Multiple Records

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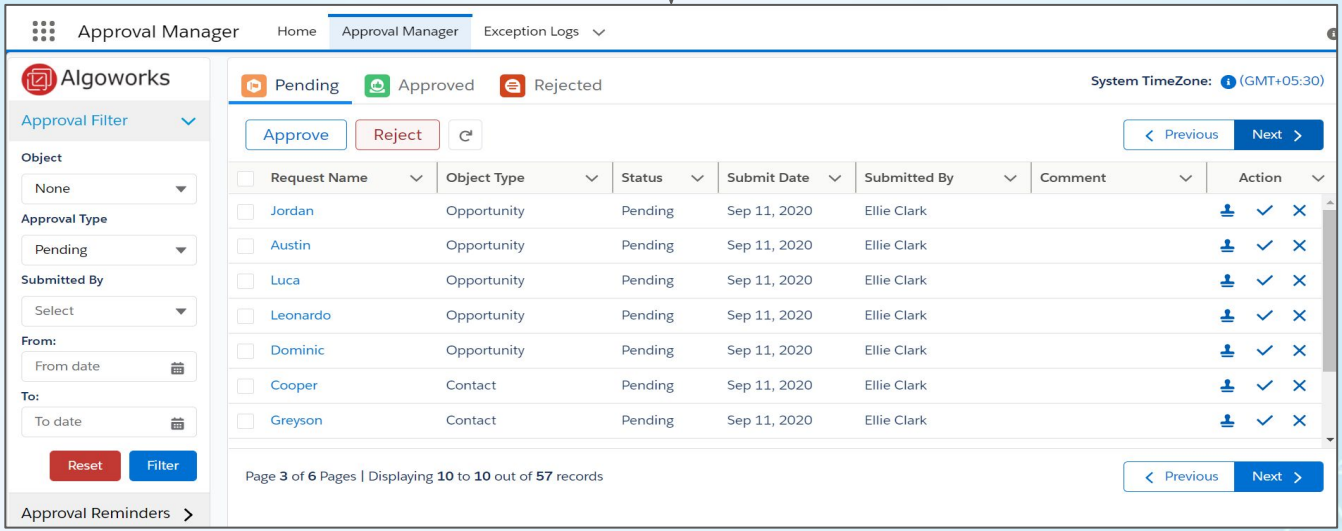
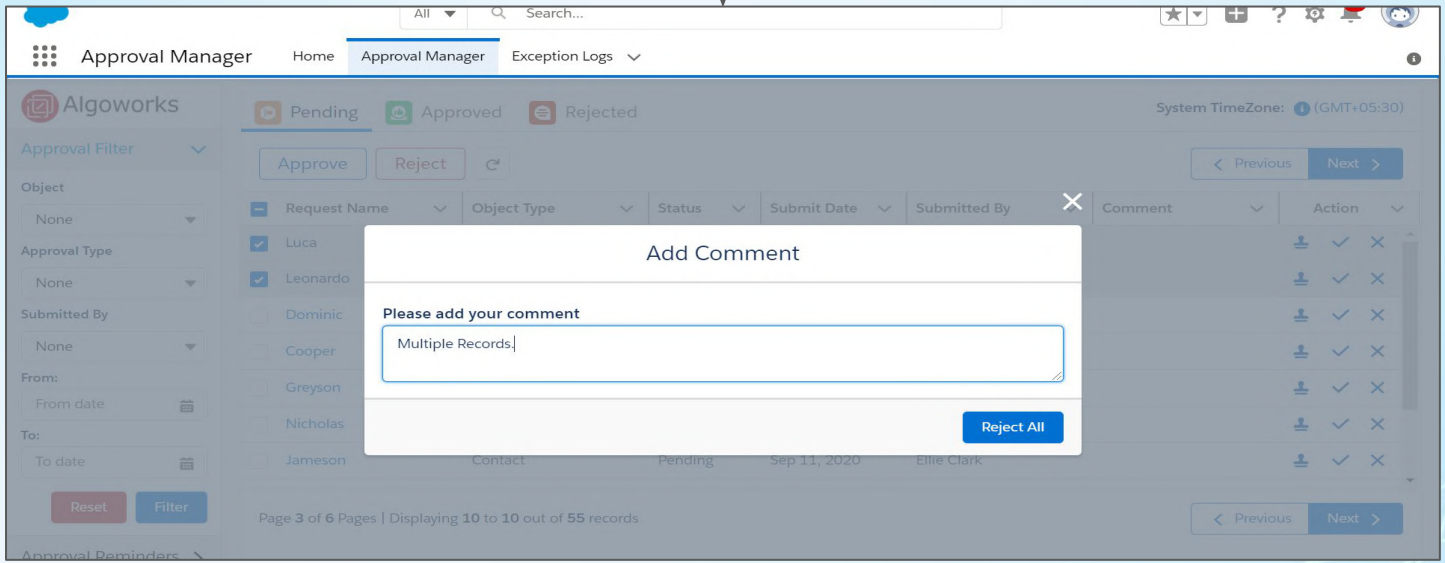
# FILTERING BY APPROVAL TYPE

This will Help the user to filter Records by Approval Type – User had chosen to filter records that are Approved in Lightning



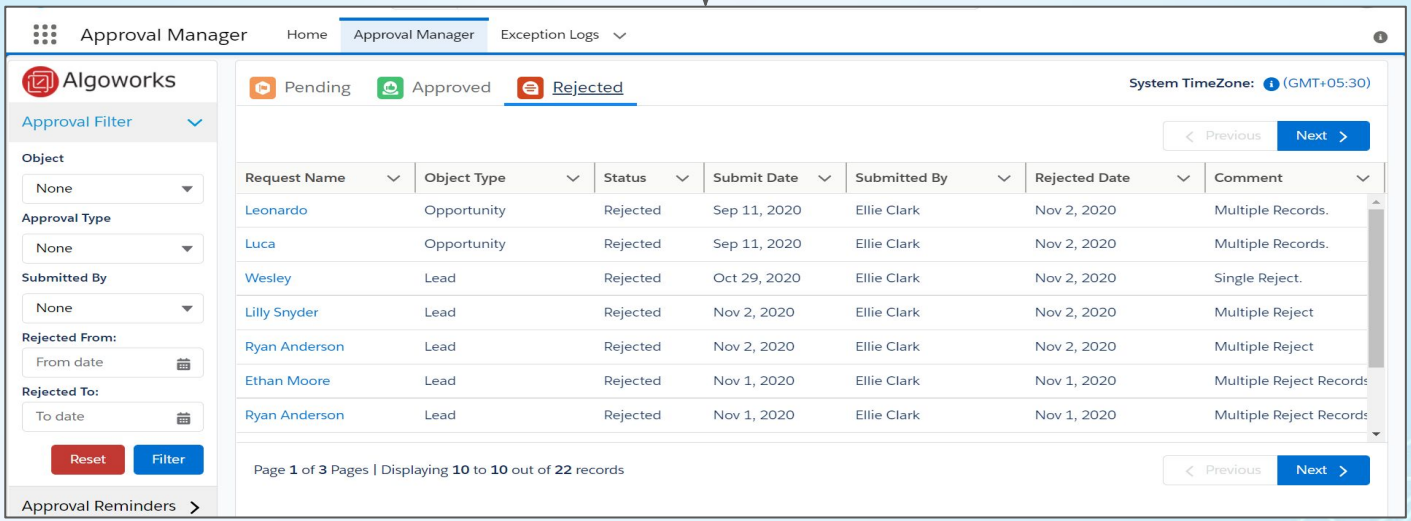
# FILTERING BY COMMENTS

Filtering by Comments in Lightning



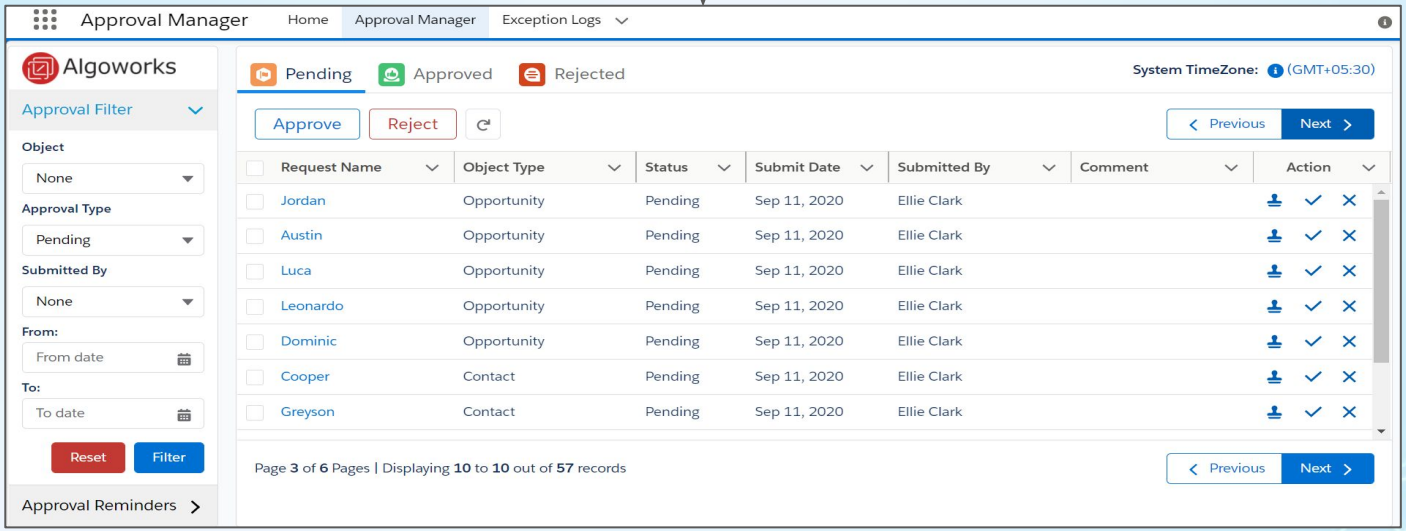
# FILTERING BY COMMENTS

This will Help the user to filter Records by Comments In Lightning



# FILTERING BY APPROVAL TYPE - PENDING

This will Help the user to filter Records by Approval Type – User had chosen to filter records that are in the Pending Stage in Lightning



# Part 3:

## Approve/Reject Multiple Records

## Reject Multiple Records

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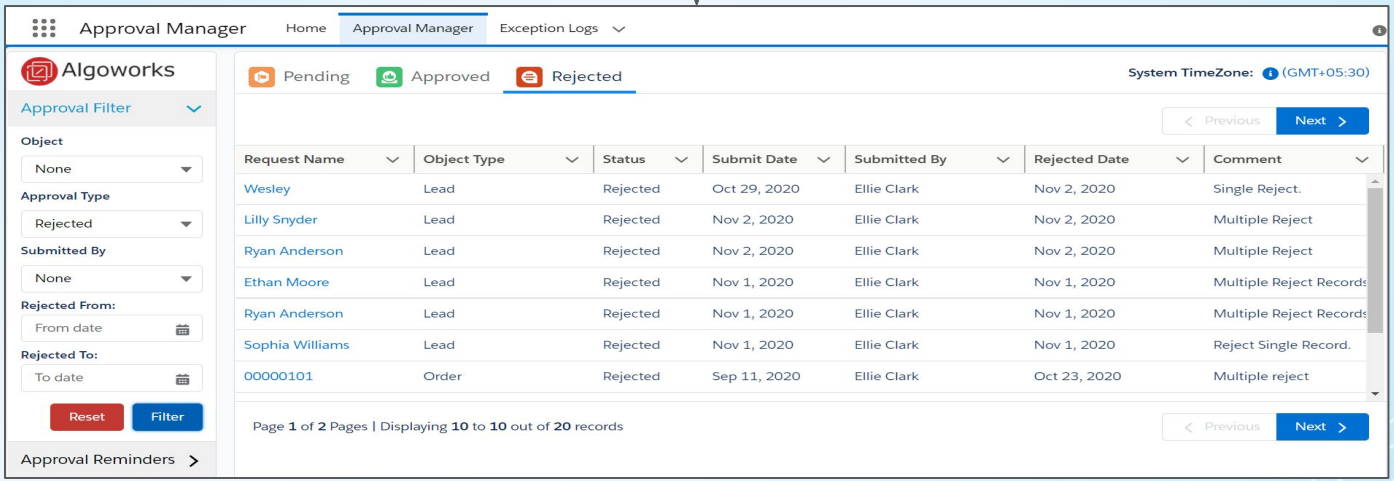
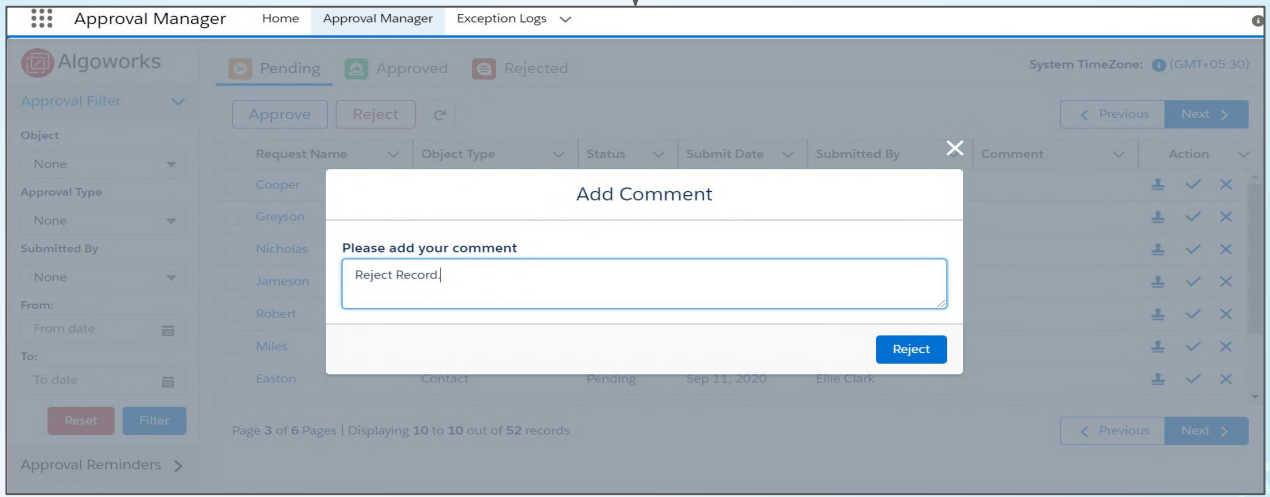
# FILTERING BY APPROVAL TYPE - REJECTED

Filtering by Rejected Approvals in Lightning



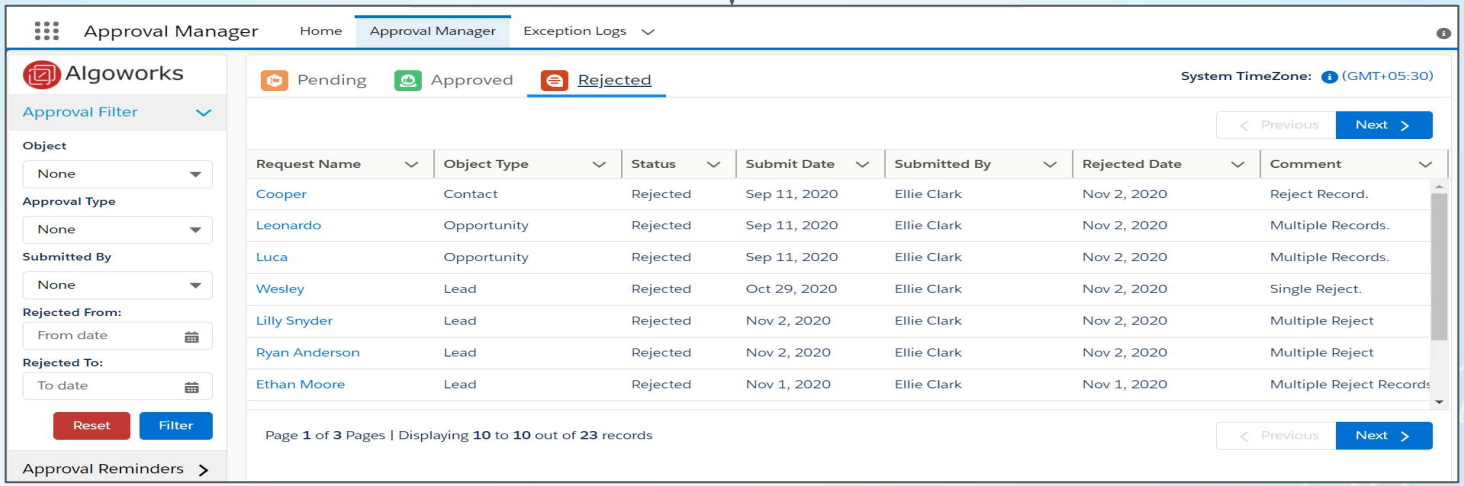
# FILTERING BY COMMENTS - REJECTED RECORDS

A User can Add the filter by entering the value of what they would want to sort by in Lightning



# FILTERING BY COMMENTS - REJECTED RECORDS

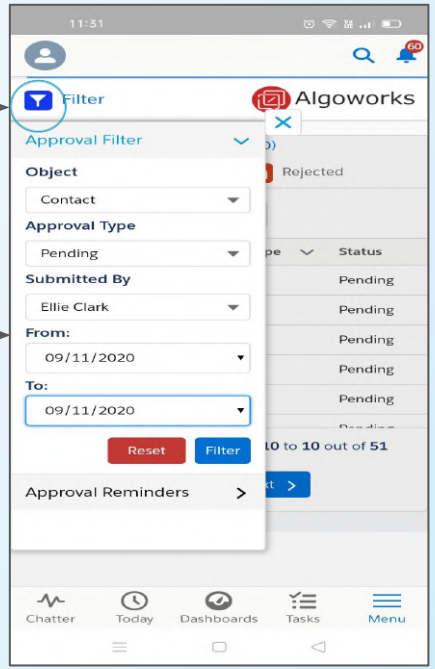
This will Help the user to filter Records by Comments. In this case the user had chosen to look at the records by “Rejected Records” Comment in Lightning



# FILTERING RECORDS - MOBILE APP

This will enable the user to filter records in a Mobile App

A User can Filter the records by Various different filters such as Object, Approval Type, Author and Date



# Part 4:
## How To Recall Records

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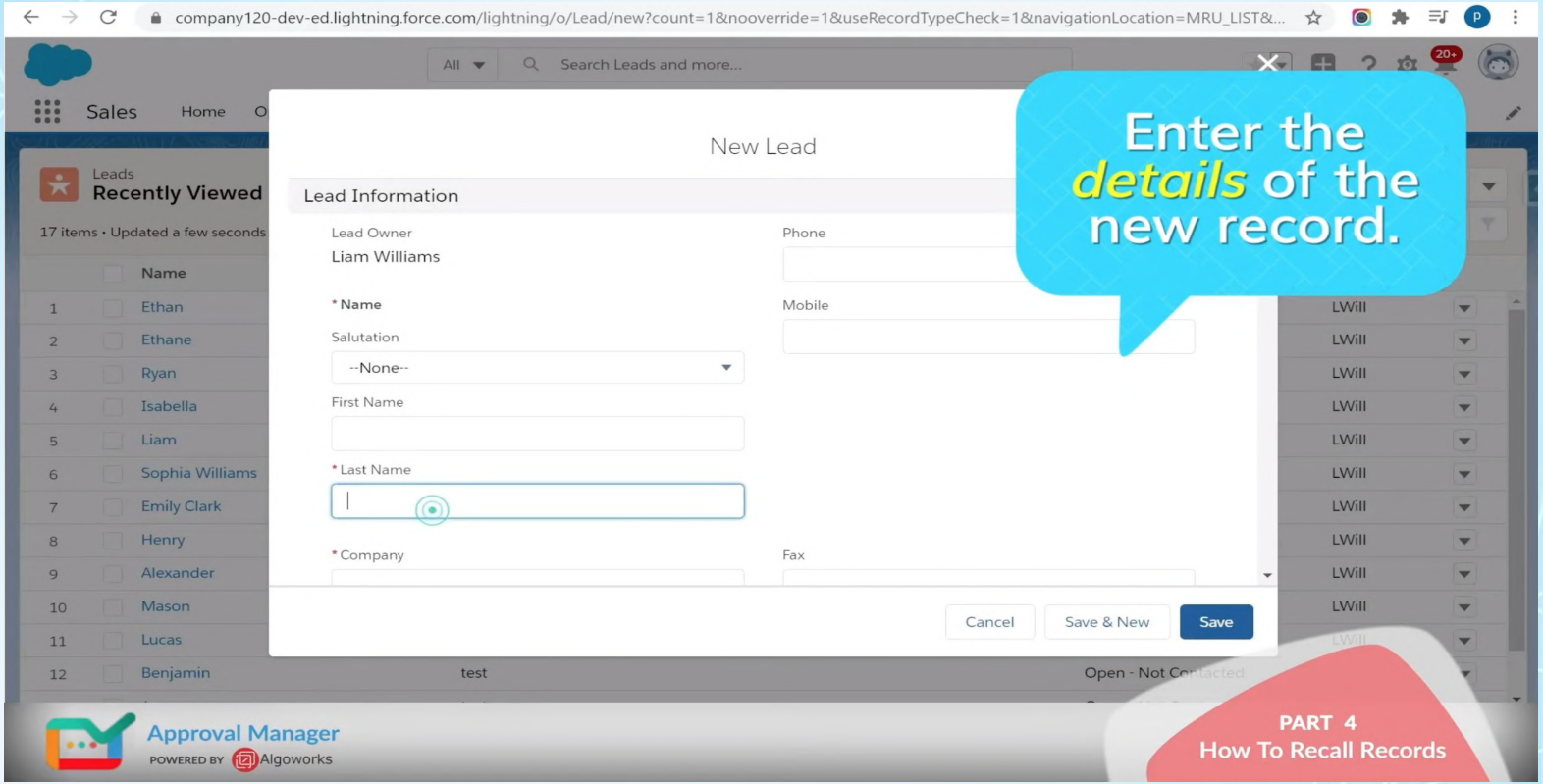
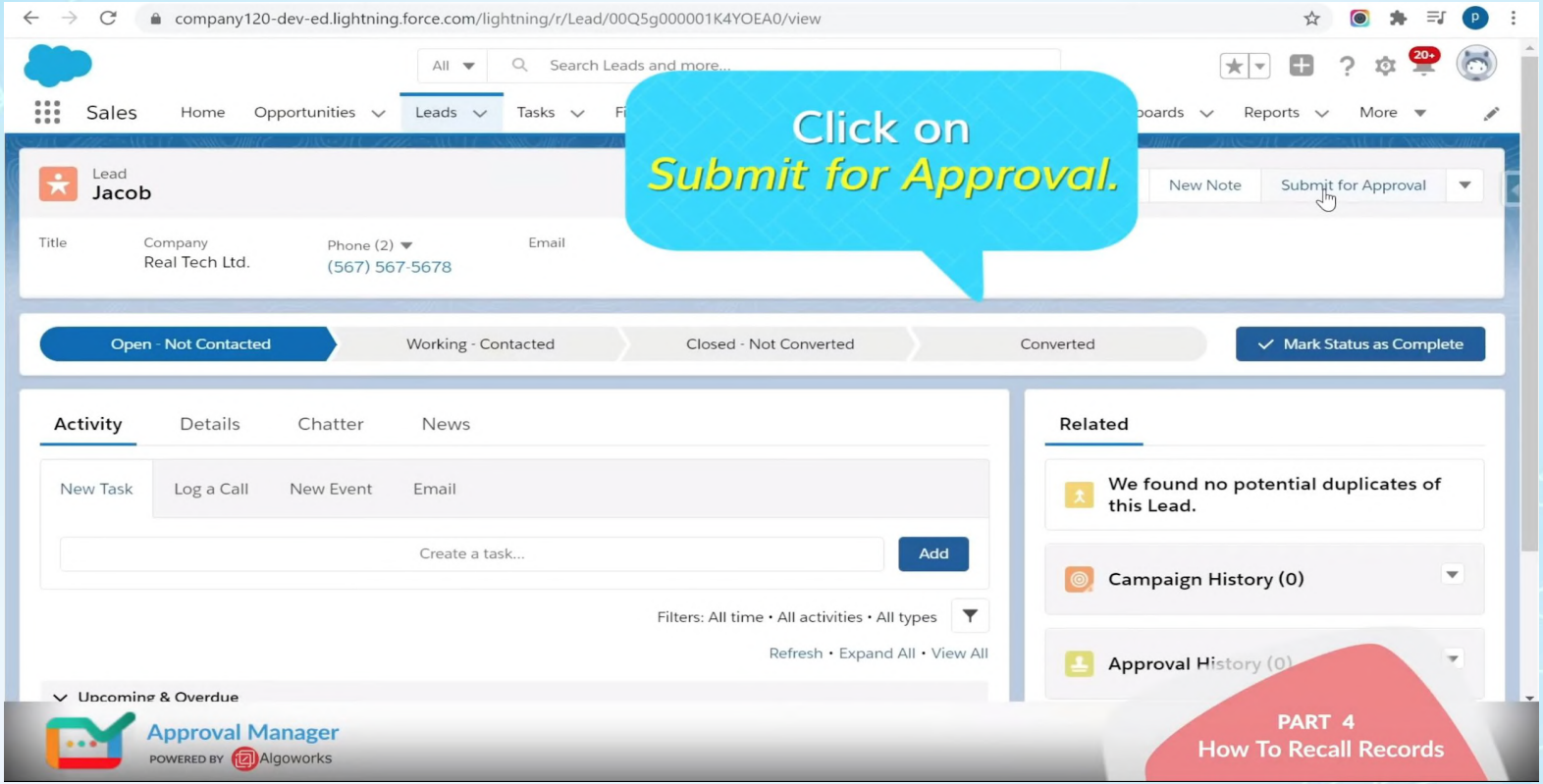
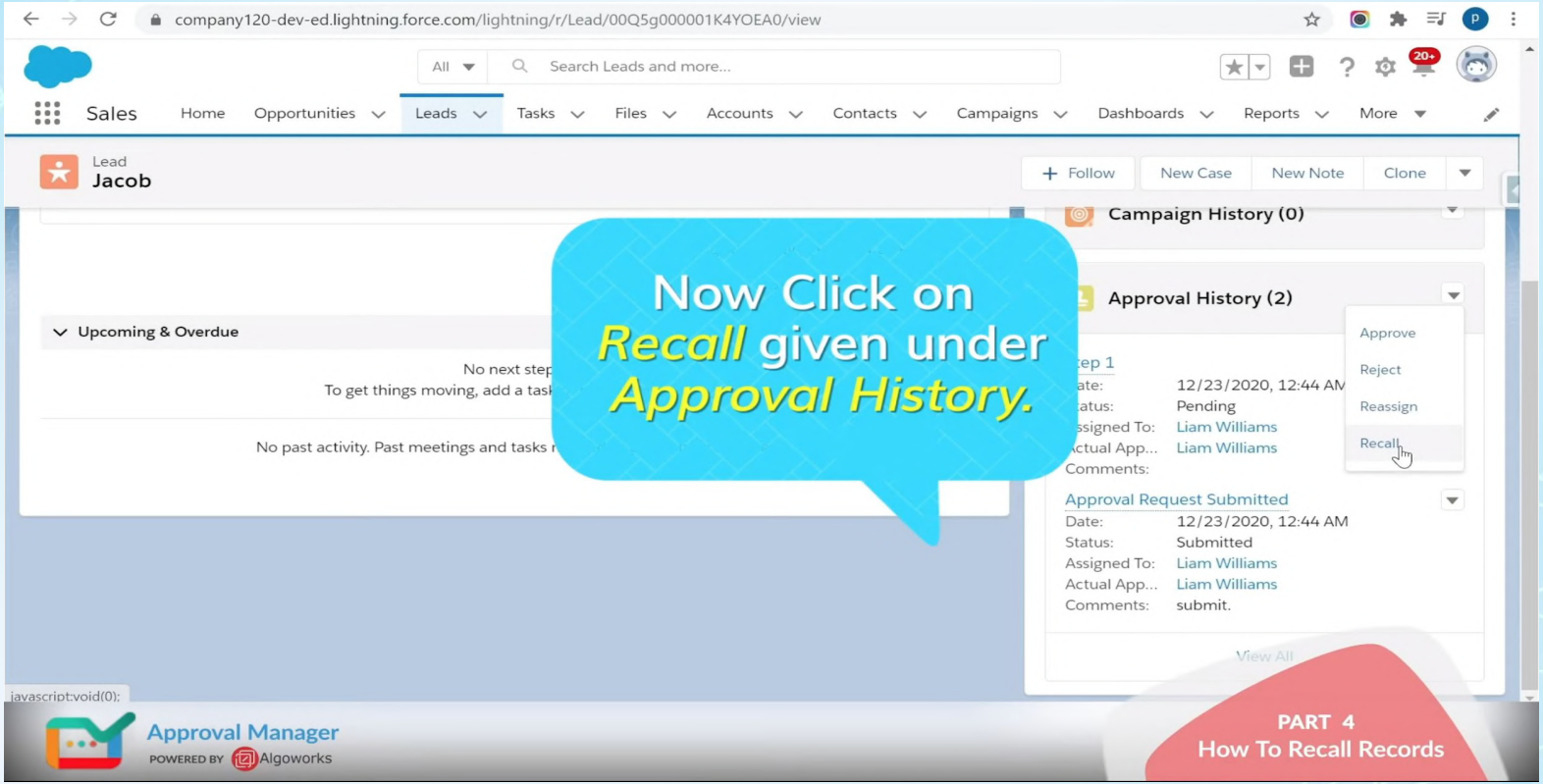
# RECALL RECORDS



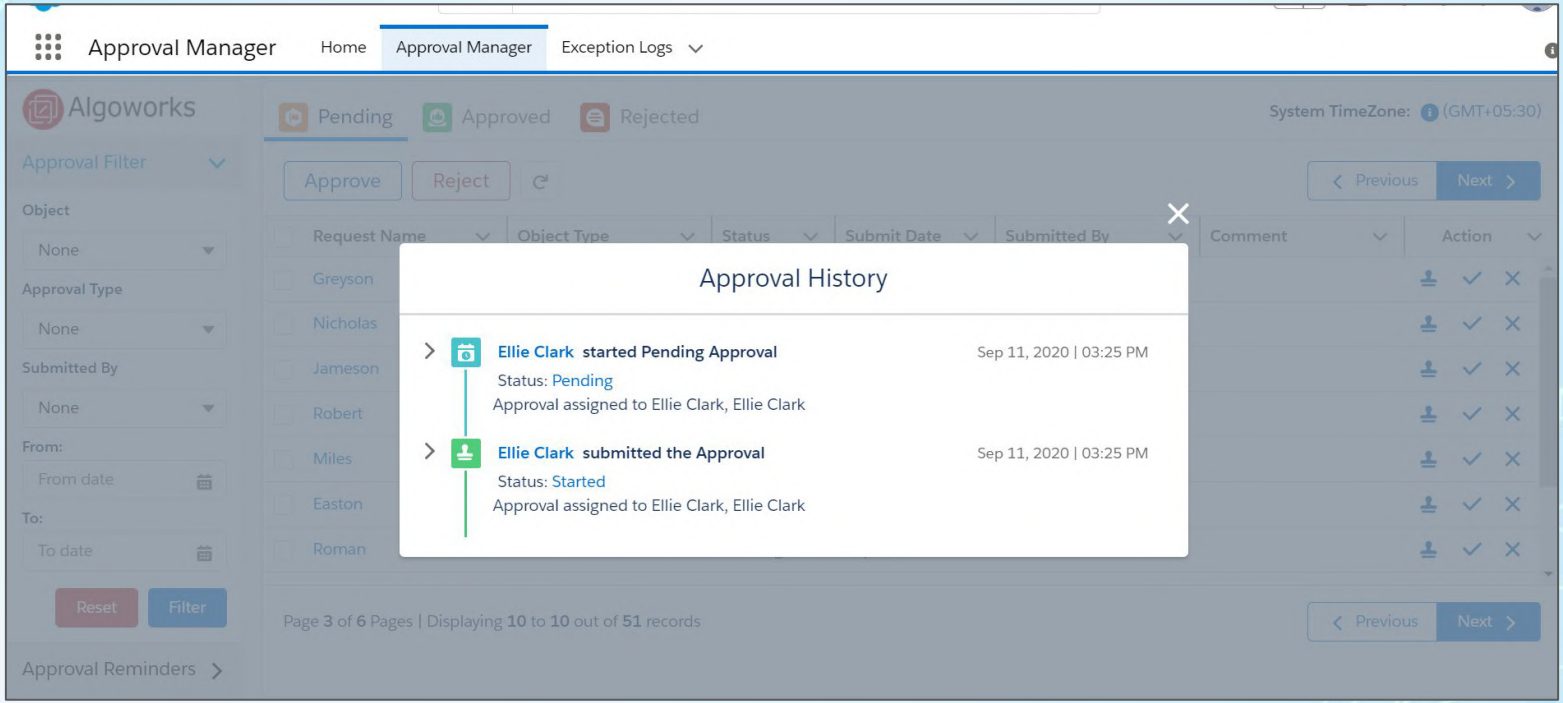
# RECALL RECORDS - SUBMIT FOR APPROVAL



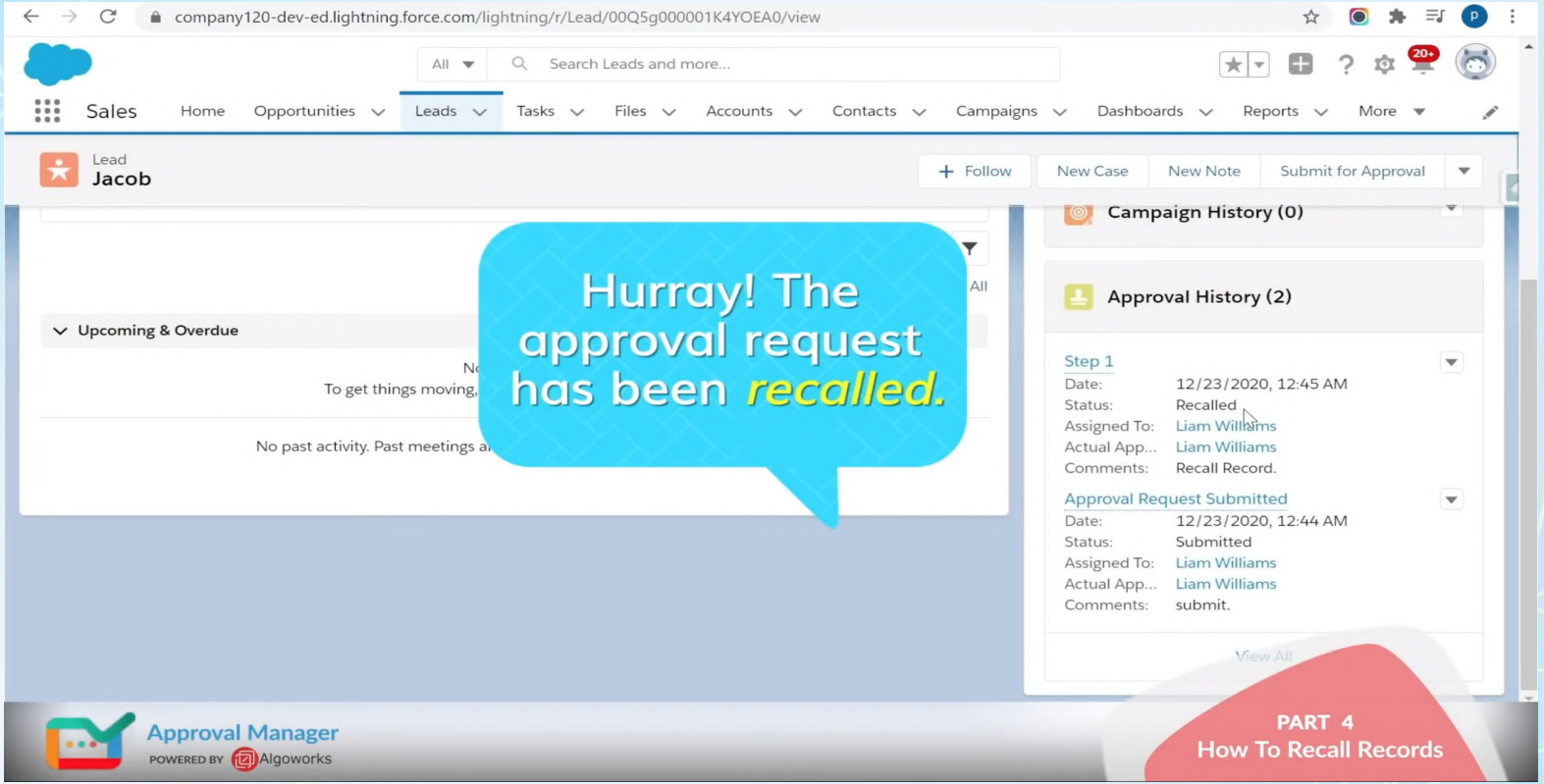
# RECALL RECORDS - APPROVAL HISTORY



# APPROVAL HISTORY



# RECALL RECORDS - RECALLED



Part 5:
Approval Reminder Settings
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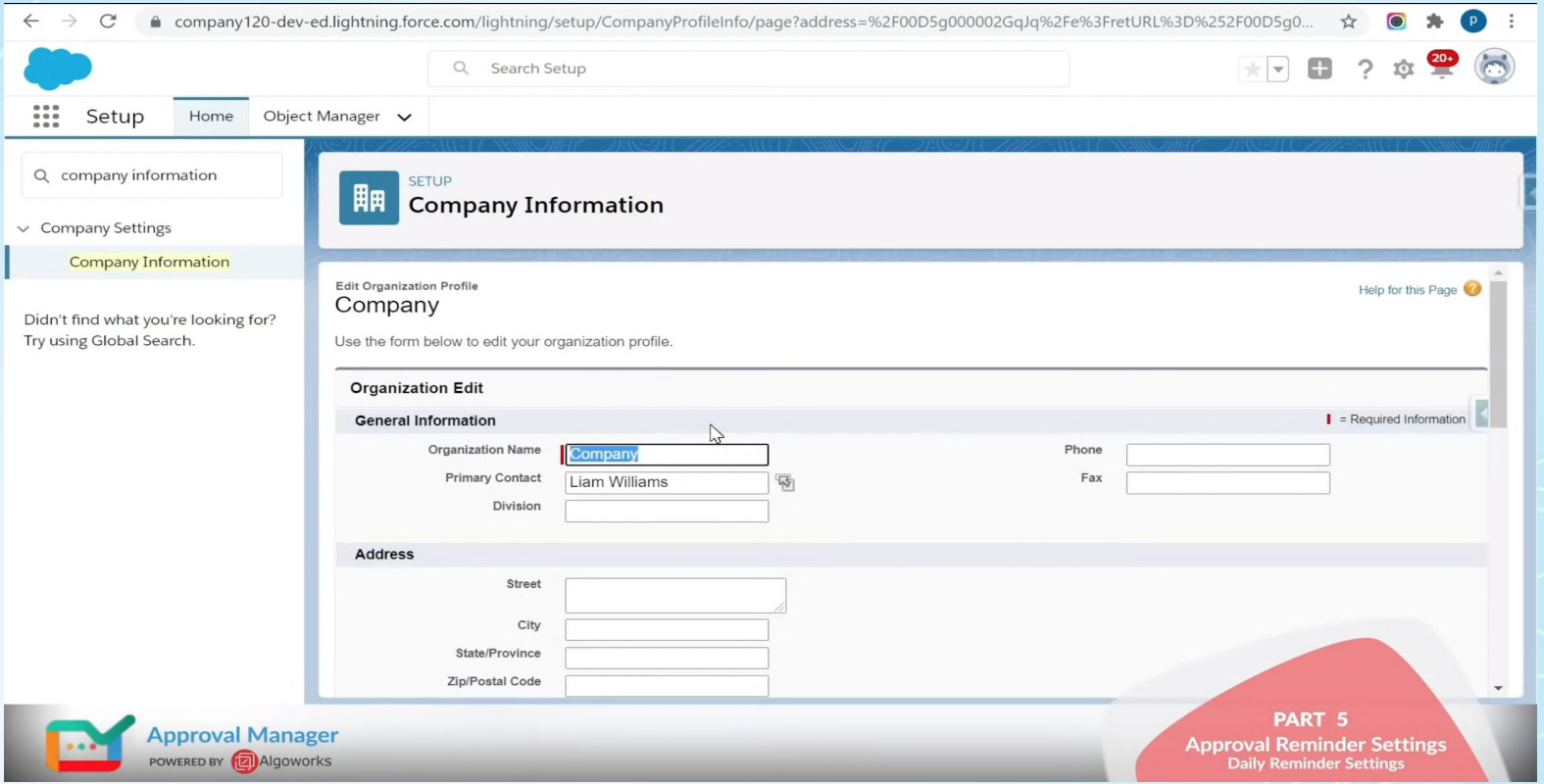
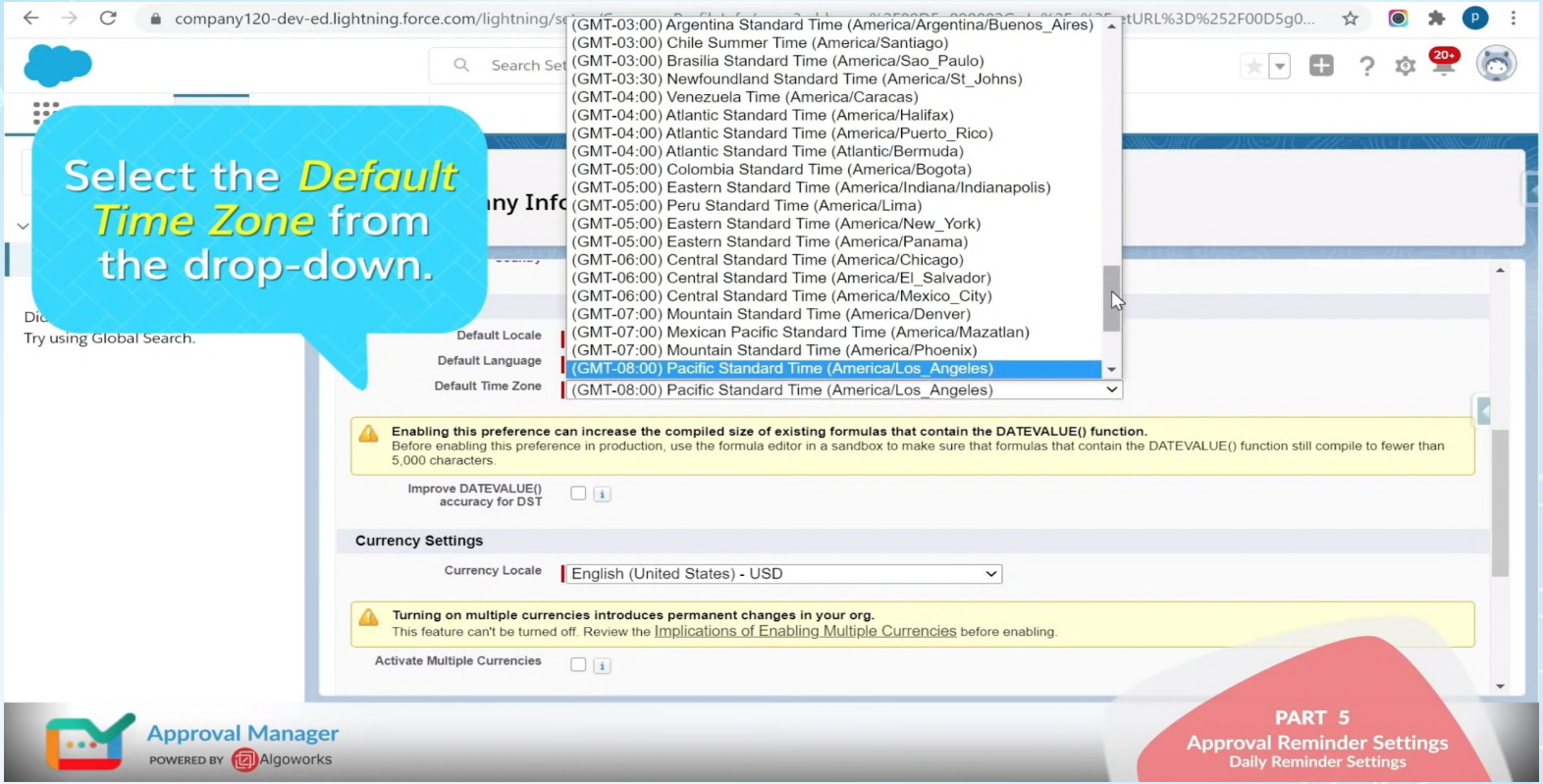
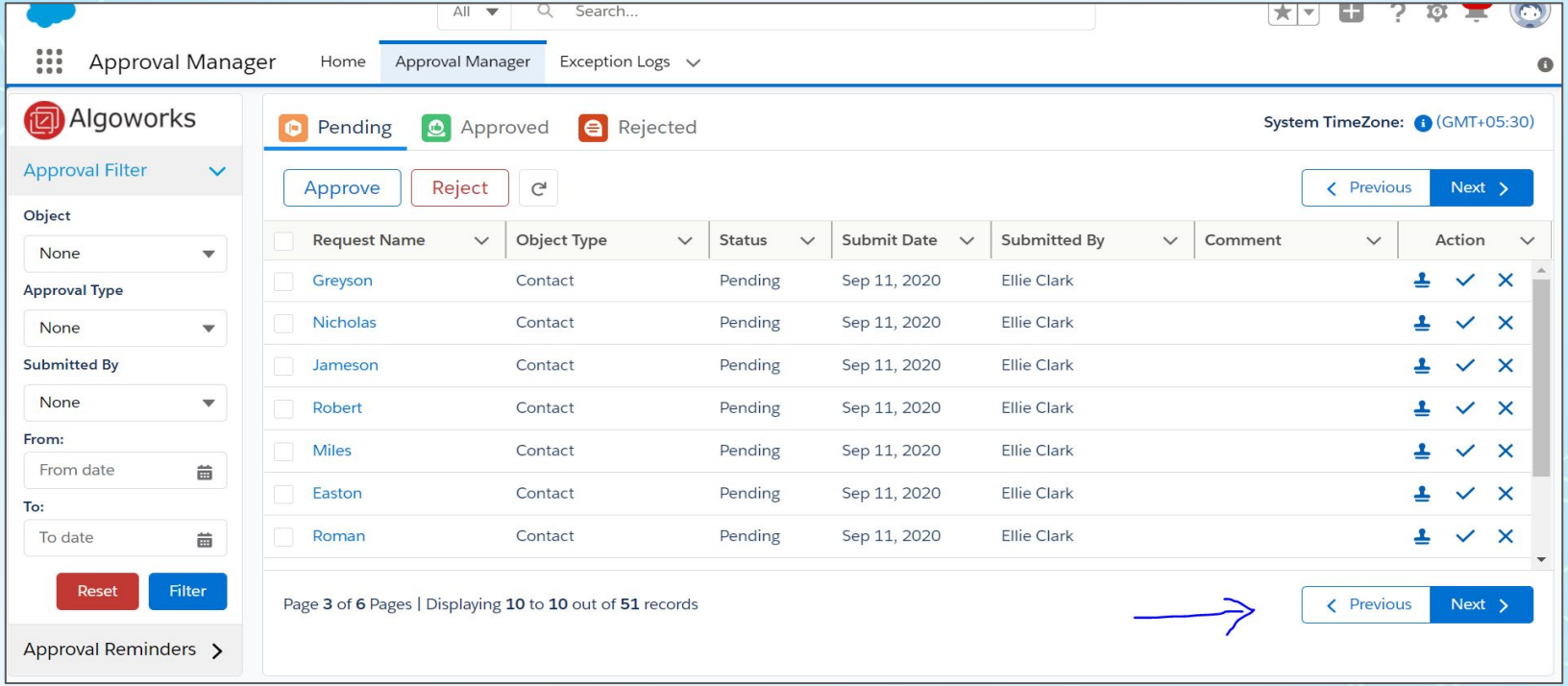
# APPROVAL REMINDER



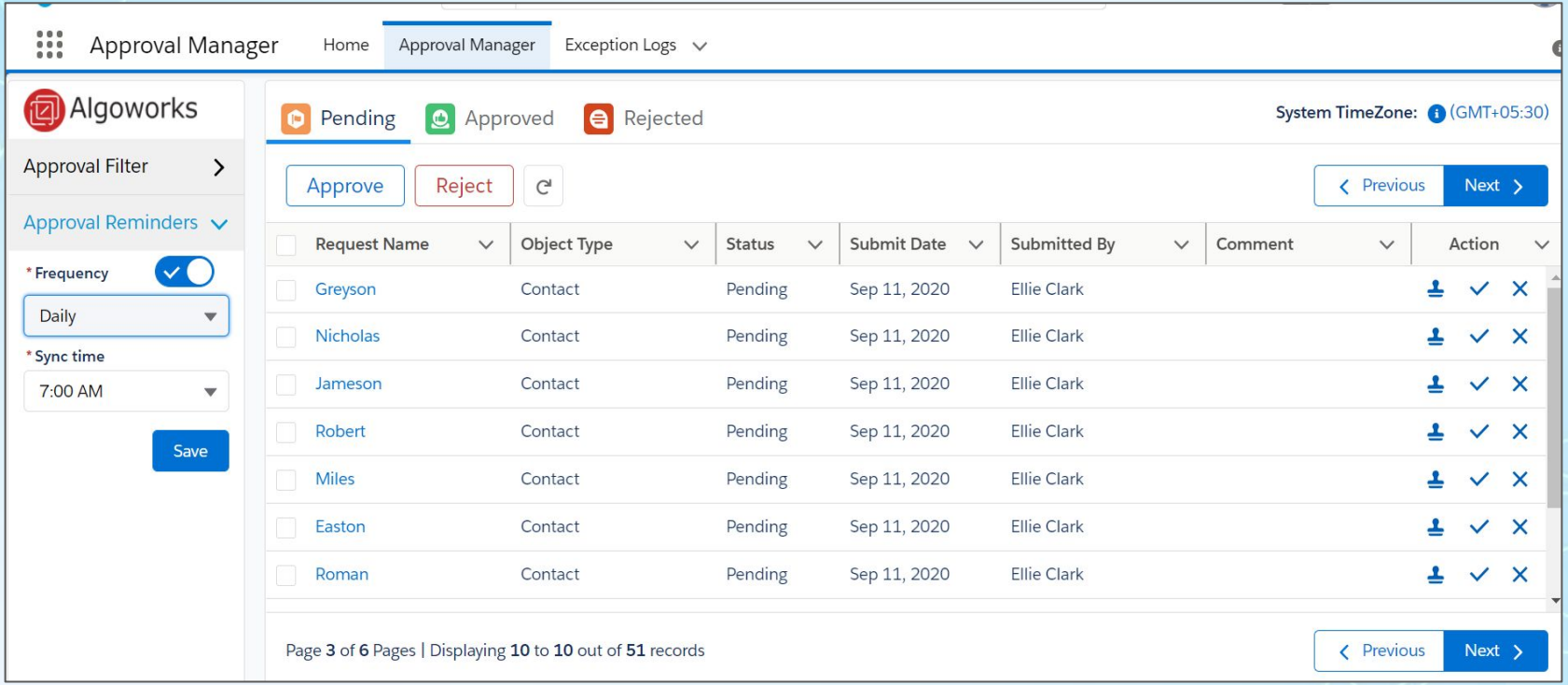
# APPROVAL REMINDER



# APPROVAL SCHEDULER



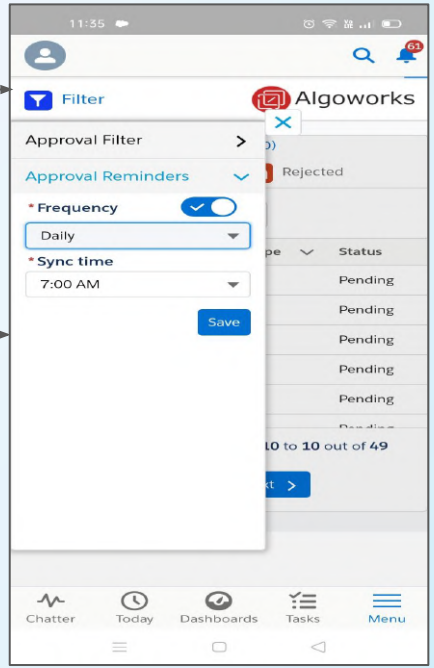
# APPROVAL SCHEDULER



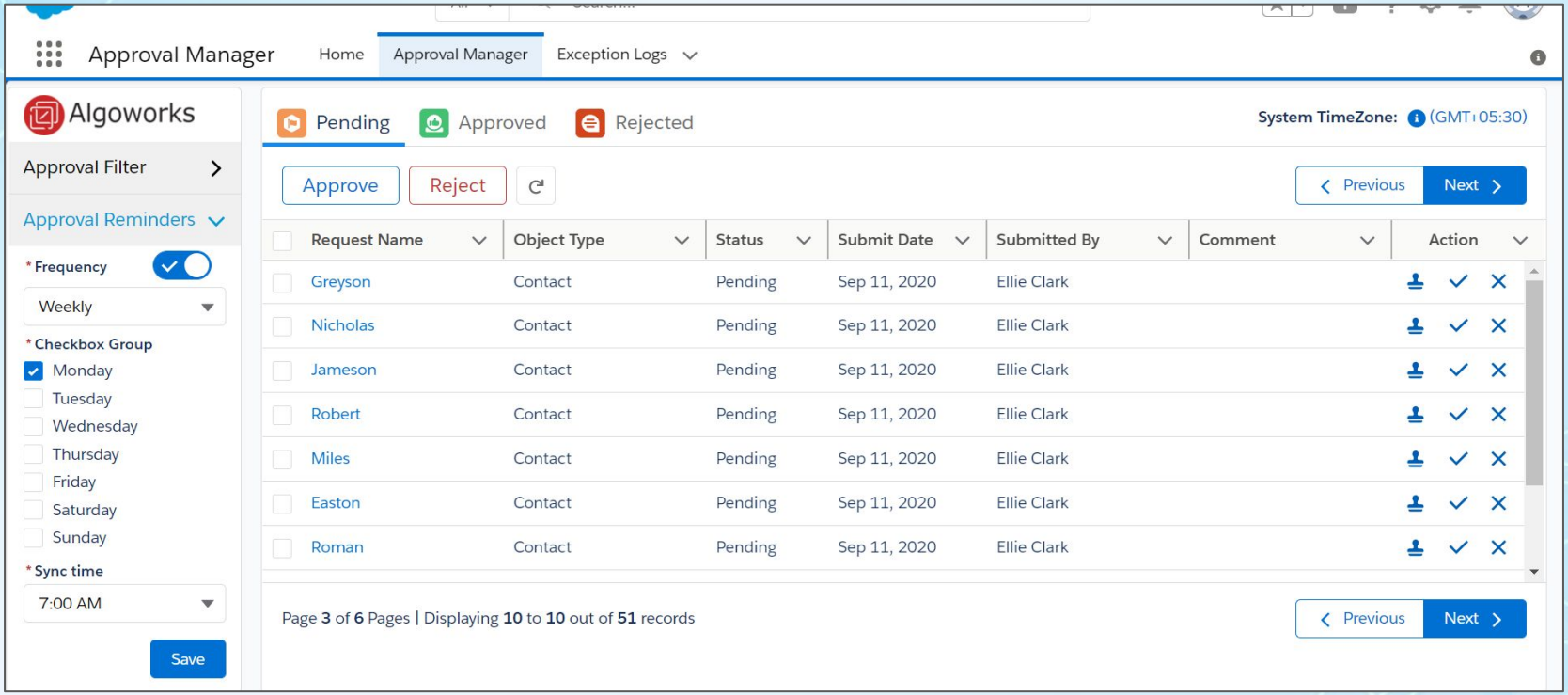
# APPROVAL SCHEDULER - MOBILE APP

Approval Scheduler – Daily

Lets the user Schedule the Approvals on daily basis at a given time



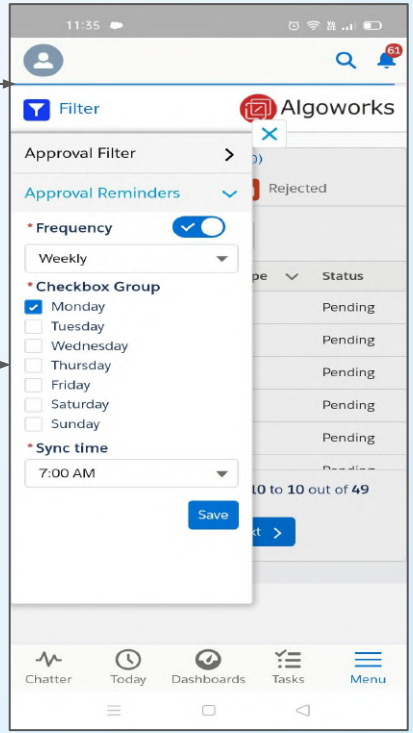
# APPROVAL SCHEDULER - WEEKLY(SELECT DAY)



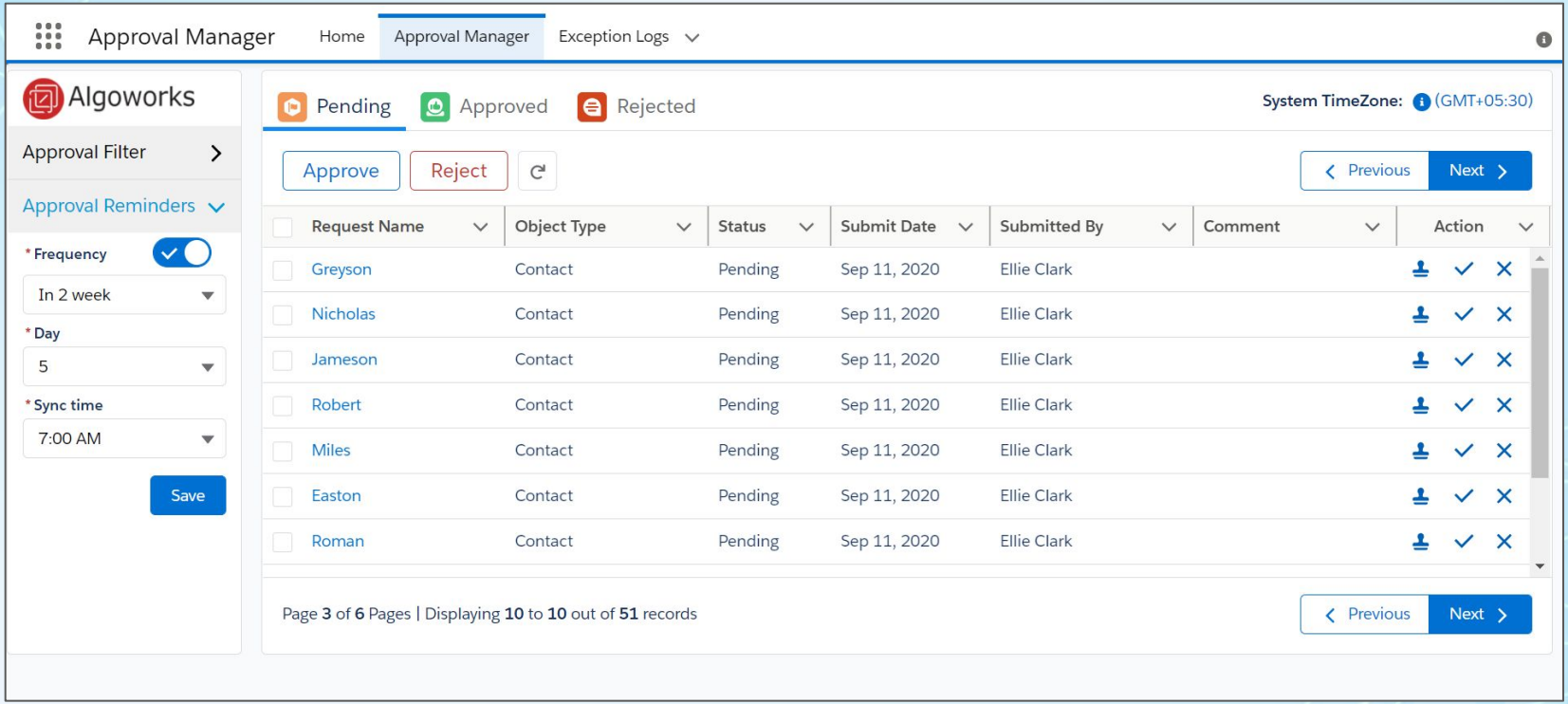
# APPROVAL SCHEDULER - WEEKLY - MOBILE APP

Approval Scheduler – Weekly

Lets the user Schedule the Approvals on Weekly basis at a given time



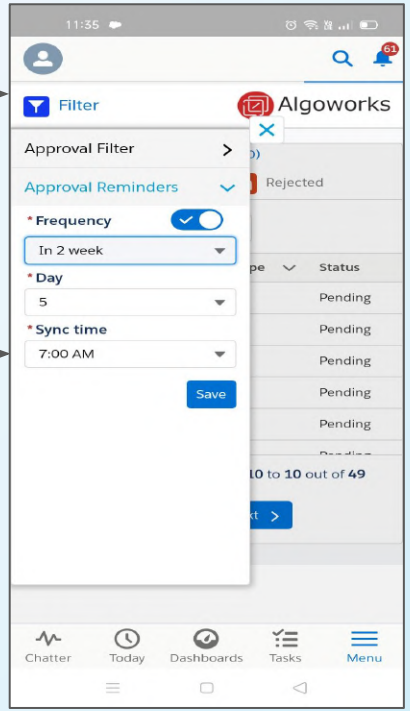
# APPROVAL SCHEDULER - FUTURE WEEKLY(SELECT DAY)



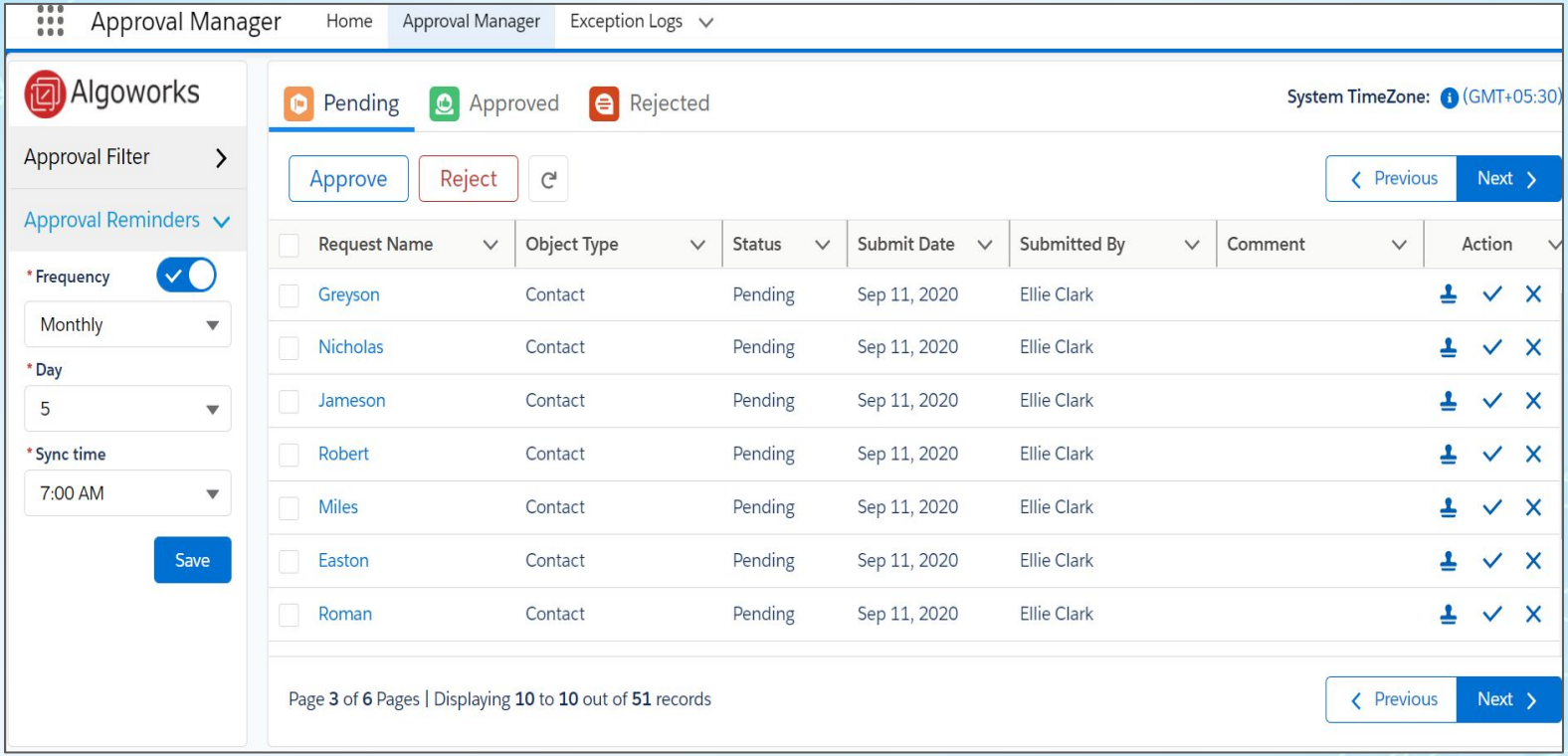
# APPROVAL SCHEDULER - FUTURE WEEKLY(SELECT DAY) - MOBILE APP

Approval Scheduler – Future Weeks

Lets the user Schedule the Approvals on Future Weeks basis at a given time



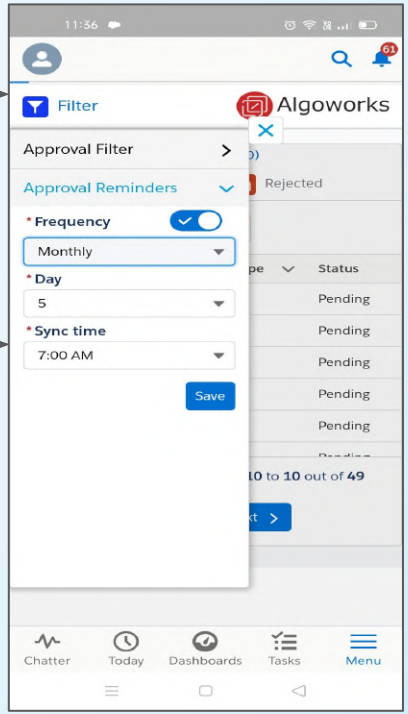
# APPROVAL SCHEDULER - MONTHLY(SELECT DAY)



# APPROVAL SCHEDULER - MONTHLY(SELECT DAY) - MOBILE APP

Approval Scheduler – Monthly basis

Lets the user Schedule the Approvals on Future monthly basis at a given time



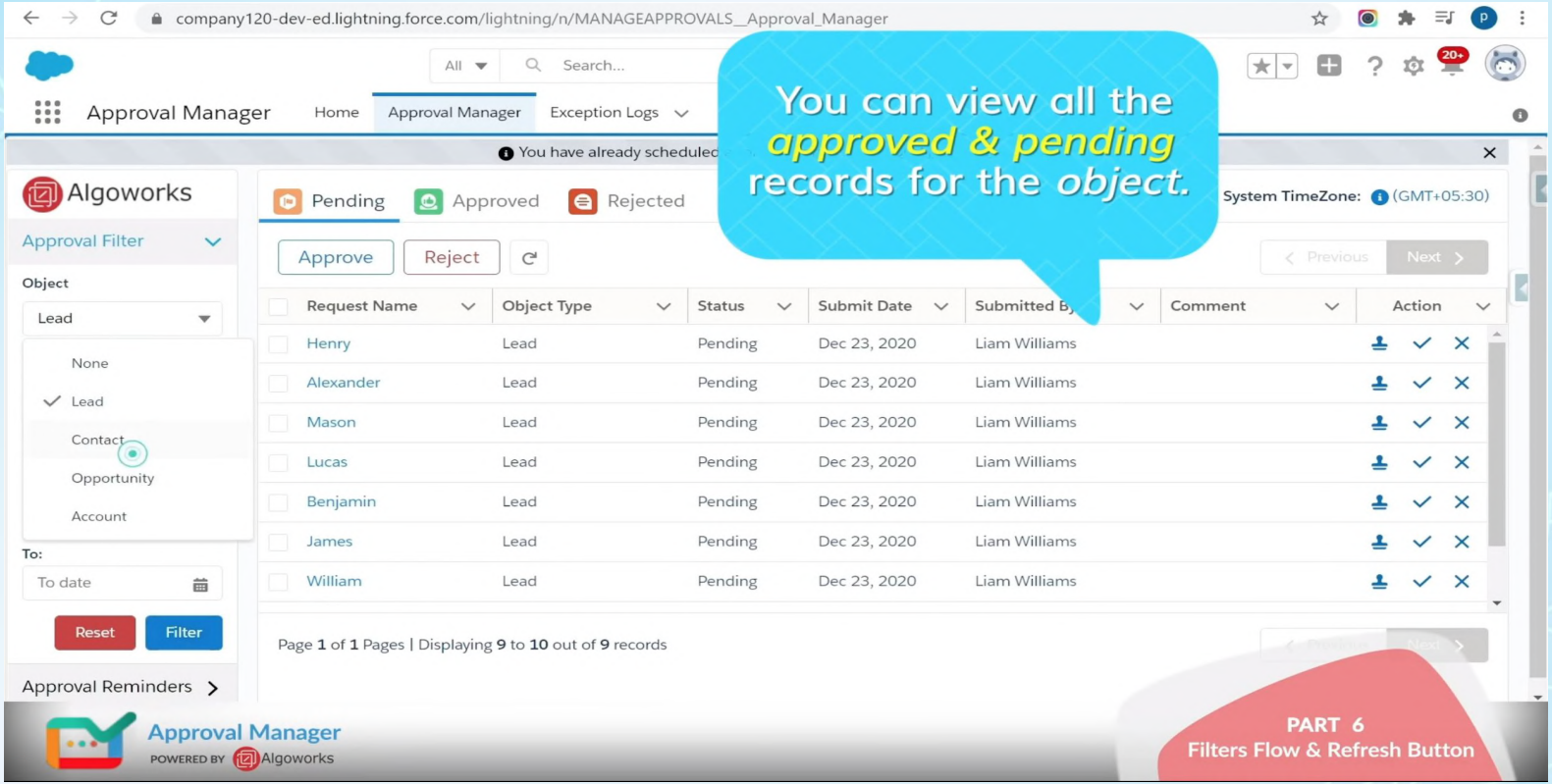
# Part 6:

## Filters Flow & Refresh Button

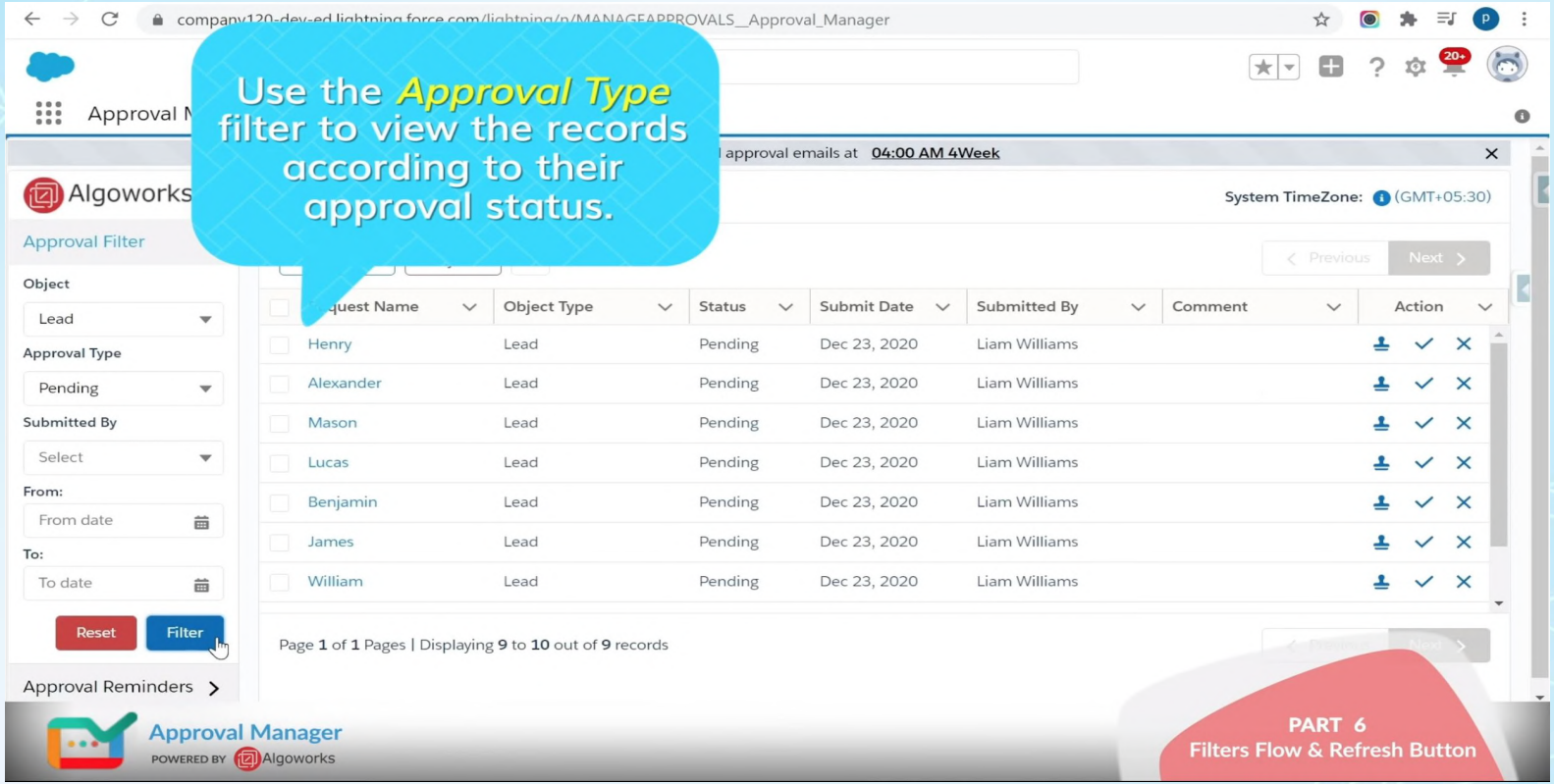
Approval Manager

POWERED BY Algoworks

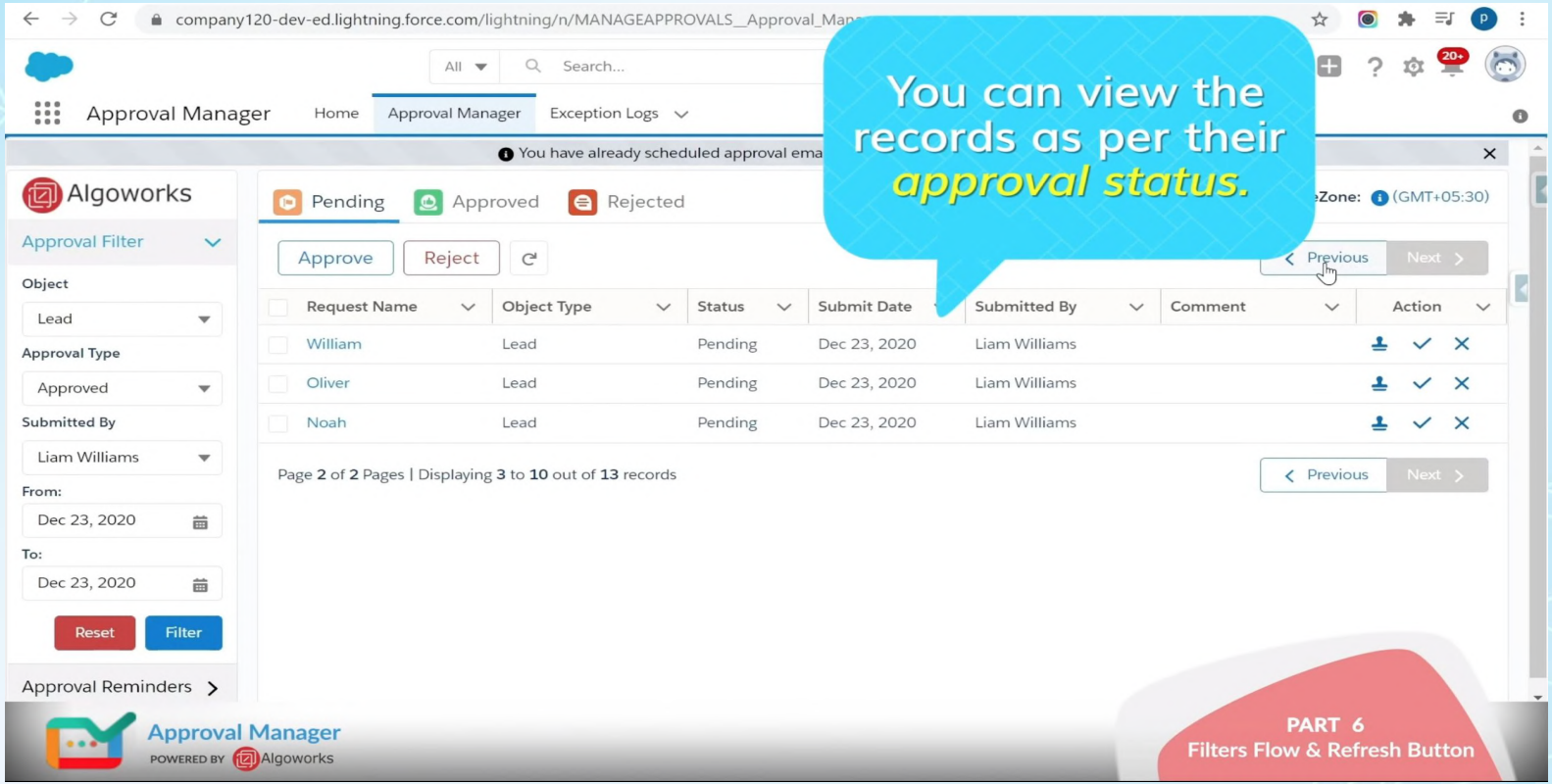
# FILTERS FLOW



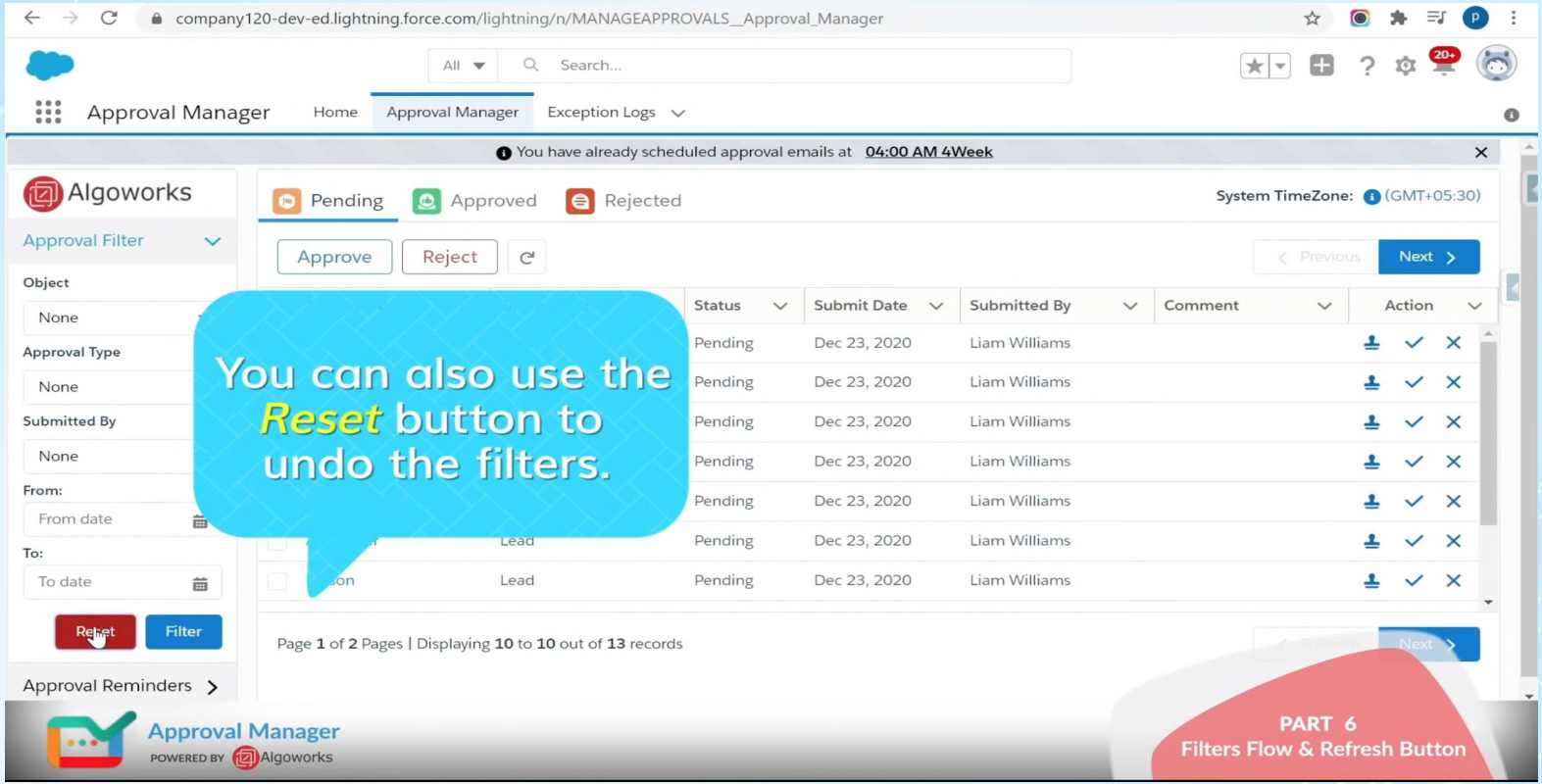
# FILTERS FLOW



# FILTERS FLOW



# REFRESH BUTTON



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# DELIVERING SOLUTIONS WORLDWIDE