

GETTING STARTED WITH THE SALESFORCE CPQ ADVANCED APPROVALS SLACK APP

This application enables communication between the Salesforce CPQ Advanced Approvals application and Slack. System admins can connect a Slack workspace to their Salesforce org, which enables the CPQ Advanced Approvals for Slack app in their Slack workspace. From there, Salesforce users with a Slack profile can start Slack, click Connect, and follow the authorization process to connect their Slack profile with their Salesforce profile. This connection allows targeted messages from Salesforce to Slack and approval record interactions from Slack to Salesforce.

When a user submits a Salesforce record for approval in Advanced Approvals, a Slack message is sent to the appropriate Slack users in the connected workspace. When an approval's status changes in Salesforce, the Slack messages are updated in real time.

In Slack, connected or authenticated users can click the CPQ Advanced Approvals for Slack application in their Slack workspace to interact with the approval data. On the Home tab, users see a list of their open and closed approvals, filtered based on the approval's assigned user in Salesforce. Users can filter based on available options on the Home tab. The page will refresh when View More is clicked.

On the Slack app's Messages tab, users can view the message history of approval requests sent from Advanced Approvals in Salesforce. If an approval is still active (pending Approve or Reject actions from users), the user can click the following buttons:

Approve

Opens a window with additional details about the record to be approved. From here, the user can choose to either confirm the approval or close the window. Confirming the approval sends a request to Salesforce to commit the approval action against the Advanced Approvals package's Approval API.

For more information, review [Approval API](#) in Salesforce CPQ & Advanced Approvals developer documentation.

Reject

Opens a modal with additional details, including custom fields and metadata, about the record to be rejected. From here, the user can either confirm the rejection or close the window. Confirming the rejection sends a request to Salesforce to commit the rejection action against the Advanced Approvals package's Reject Approval API.

For more information on rejections, review [Reject Approval API](#) in Salesforce CPQ & Advanced Approvals developer documentation.

View More

Opens a window to show additional details, including custom fields and metadata, about the record to be approved.

NOTE: On the App's Home tab, up to 5 records of open and closed approvals are shown at a time. Additional records are shown on clicking View More. These Open and Closed approvals are available for action for 45 days from creation.

ADMIN SETUP STEPS

Configure the Salesforce CPQ Advanced Approvals Slack App for your org's approvers.

Salesforce CPQ and Advanced Approvals packages must be installed. Users must have the Salesforce CPQ License, Salesforce CPQ Advanced Approvals license, and the necessary CPQ and Advanced Approvals permission sets. You must also complete the Initial Slack Setup and Agree to Terms and Conditions found in Salesforce under Setup – Initial Slack Setup.

1. Configure the Salesforce CPQ Advanced Approvals Slack App
 - a. Go to the AppExchange page for the [Salesforce CPQ Advanced Approvals Slack App](#).
 - b. Authenticate to the Salesforce org that you want to connect to the Slack App.
 - c. Assign the Salesforce CPQ AA Permission Set License to all users who will be approving records in Slack.
You must assign the license in Salesforce Classic. You can find license information in the Company Information section of Setup.
 - d. Add the Advanced Approvals Slack User, and Slack Service User permission set to all users who will be approving records in Slack, and to yourself.
2. If you want to log record changes in Salesforce, configure logging. Otherwise, go to Step 3.
 - a. From Setup, enter *Build*, then select **Develop**, and then select **Custom Metadata Types**.
 - b. Go to Log Settings and click **Manage Records**.
 - c. Edit the default record. If you don't have a default record, click **New**.
 - d. Configure logging based on your org's requirements.
 - Enable Logging: Main switch for turning the logging functionality on or off.
 - Enable Pruning: Automatically delete records after they reach a certain count.
 - Interfaced Class Order: The name of the class handling the logging functionality. By default this is the LogToObject, but developers can extend it to perform additional logic.
 - Bypass Platform Events: When selected, this will bypass platform events and send Log records directly to the SObject.
 - Log to System Debug: Logs debug statements to the Log object, if present. Debug statements in managed packages are hidden and won't provide useful details.
3. Configure the Slack View modals in case you want to further define additional fields to be viewed for the Approve, Reject, and View More modals.
 - a. From Setup, enter *Object Manager*, select **Object Manager**, and then select the object that you have mapped to the Advanced Approvals process field sets.
 - b. To create a field set, click **New**.
 - c. Add, remove, and adjust fields in the field set until they appear in the order you want them to display in Slack, then save your changes.
 - d. In Salesforce Setup for Lightning, search for **Custom Metadata Types** in the *Quick Find* on the left.

Admin Setup Steps

- e. Go to Slack View Configuration and click **Manage Records**.

The following views are available for definition.

- Approval Modal Quote : Approval_Modal_Quote
- Reject Modal Quote : Reject_Modal_Quote
- View More Modal Quote : View_More_Modal_Quote

- f. Click Edit on one of the Approval, Reject, or View More records. On the Edit page, the Related Approval Record section shows the SObject that the view applies to, and the Field Set API name for the SObject. The Field Set API Name is the name of the field set containing the dynamic fields that you want to show in the Slack View.

- g. Repeat the above for any additional View modals as needed.

- h. *OPTIONAL*: For any additional alternative views, click **New** to begin configuring them based on your org's requirements.

- View: Represents the view or window in Slack for which you're identifying a field set.
- SObject: The field set applies to this Salesforce object.
- Field Set Api Name: API name (including underscores) of the field set that stores the fields for the SObject to display in Slack.

4. Add the Salesforce CPQ Advanced Approvals App to the Slack Workspace.

- a. Paste the Slack app link below into your browser: [Installation Link](#)

- b. Click **Allow** to permit the app to interact with your Slack workspace.

- c. After the installation has finished, go to any channel in your Slack workspace and enter the following command to start the connection between the Slack app and a Salesforce org.

`/cpq-connect`

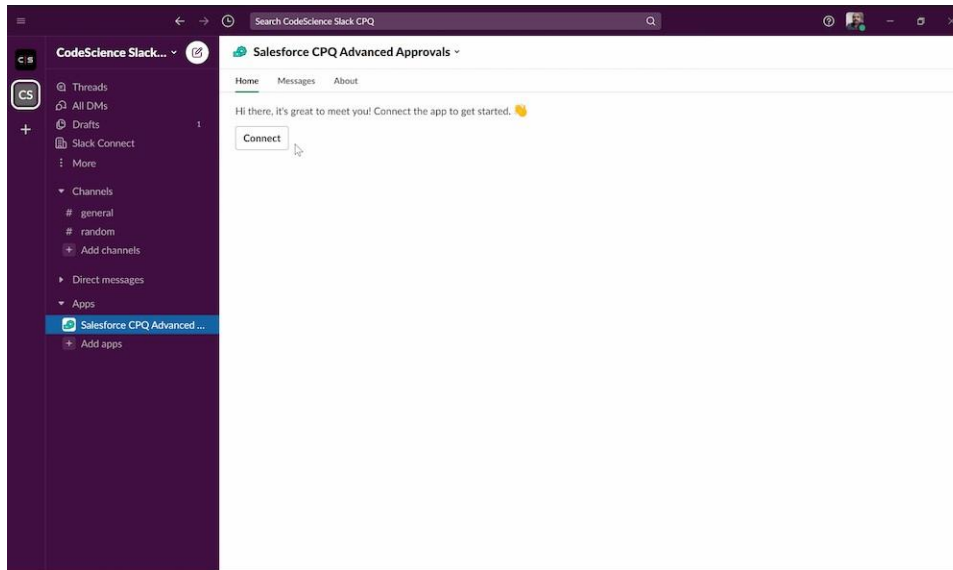
- d. Click **Connect** to start the login process to the Salesforce org where the Salesforce app has been installed.

- e. Enter your Salesforce system admin username and credentials. This will be the user that connects the Slack app to the Salesforce app. Some interactions will run through this "system" user, but all interactions initiated by the approvers will be done through their Salesforce user's context.

- f. Click **Allow** to allow Slack to access your Salesforce account.

- g. Click **Connect** to connect Slack to your Salesforce org.

Admin Setup Steps



APPROVER SETUP STEPS

Follow these steps the first time you log in after an admin has configured the Salesforce CPQ Advanced Approvals Slack app for your org.

Ensure the following steps have been completed.

- Completion of the Admin Setup steps.
 - Approver must have a Salesforce user profile.
 - Approver's Salesforce user must have the appropriate CPQ licenses and permission sets.
 - Approver's Salesforce user must have the appropriate Slack Standard User and Slack Service User permission sets.
 - Approver's Salesforce user must have this app's license and permission set installed.
 - Approver must have a Slack user in the workspace where the app was installed.
1. Go to the app's Home tab and click **Connect your account**, and then click **Connect**.
 2. Enter your Salesforce username and credentials. This user profile represents the user that connects your Slack approval interactions to Salesforce. These interactions run in the context of your Salesforce user.
 3. Click **Allow**.
 4. After you connect your Slack user to your Salesforce user, you can go back to the app's Home tab in Slack and see confirmation that Slack is ready to receive information from Salesforce.

GUIDELINES FOR THE SALESFORCE CPQ ADVANCED APPROVALS SLACK APP

When you work with the Salesforce CPQ Advanced Approvals Slack app, review important guidelines.

Time Zones

The initial approval message sent to Slack will format all date and date / time values in the context of the user submitting the record for approval. The windows displayed in Slack will format all date and date / time values in the context of the user viewing the window through the Salesforce user connected to their Slack user.

Labels

All of the static text shown to Slack users is represented as custom labels. These labels can be translated and will respect the running user's chosen locale.

Non-app error messages, such as error messages from the Salesforce platform or the CPQ packages may not respect a user's locale. In these situations, review documentation for your platform.

User-entered text represented in Salesforce by text fields won't be translated and remain in language of the user who entered the text, regardless of locale settings.