

Accorto Cloud Plus – Release 1.4

Configuration Instructions

The following are post installation steps. As part of your subscription we will complete these tasks. You must be logged in with a System Administrator user to complete these steps. Detailed step by step instructions follow the summary.

Summary

Required Steps

The following actions are required to complete your installation of Accorto Cloud T&E.

Override Standard Buttons

Object	Button	Visualforce Page
Payment	New	PaymentSelection { Accorto_PaymentSelection}
Payment	Edit	PaymentSelection { Accorto_PaymentSelection}
Statement	New	StatementNew [accorto_StatementNew]
T&E Report	New	TEReportNew [accorto_TEReportNew]

Optional Steps

The following actions are optional.

To allow access to sample Chart of Accounts from Google docs

- Define Remote Site <http://spreadsheets.google.com>

To allow users to create or update T&E Items via email

- Define Email Service using Apex Class of TEItemEmailHandler.

To enable Customer approval of T&E Reports via email

- Define Email Service using Apex Class of TEReportCustomer

To prevent self approval of T&E Reports:

- Remove the Approve Now button from T&E Report Page layout. If specific users should be allowed to self approve, define a new page layout with the Approve Now button for their access or it can be defined in the approval process described below.

To allow creation of T&E Items from Cases, Activities and Tasks:

- Add the fields T&E Hours and T&E Amount to the appropriate page layouts.
- Add Button Create T&E Item to the appropriate page layouts

Approval Process

To allow enable approval of T&E reports you must define the Approval process. The following are some suggested guidelines

- No entry criteria is required.

- Approval Assignment Email template is T&E Report Approval Request
- All Actions required have been defined.
 - Initial Submission
 - § Field Update – T&E Report Submitted
 - Approval Steps
 - § Criteria T&E Report Items not equal 0, else Reject
 - Approval Actions
 - § Email Alert – T&E Report Updated
 - § Field Update – T&E Management Approved
 - Rejection Actions
 - § Task – T&E Report Rejected
 - § Email Alert – T&E Report Updated
 - Final Approval Actions
 - § Field Update – T&E Report Approved
 - Final Rejection Actions
 - § Field Update – T&E Report NotApproved
 - Recall Actions
 - § Field Update – T&E Report NotApproved

Note: the field update of T&E Report Management Approved allows the definition of two different approval steps (e.g. Manager and Accounting). To enable this, change the criteria of the management approval to Criteria met, else approve : "Management Approved = "" . This field is the timestamp of the management approval and is null if that has not occurred.

Overdue Alerts

To allow enable the generation of Alerts if a T&E report is overdue define actions for the following workflow rules. Note you must have defined T&E Report frequency in at least 1 financial organization for the alerts to be triggered.

- Overdue T&E Item
 - Add Time Trigger
 - Add Time Dependant Workflow Actions : Select Existing Action or create a new one.
- Overdue T&E Report
 - Add Time Trigger
 - Add Time Dependant Workflow Actions : Select Existing Action or create a new one.

Detail

Required Steps

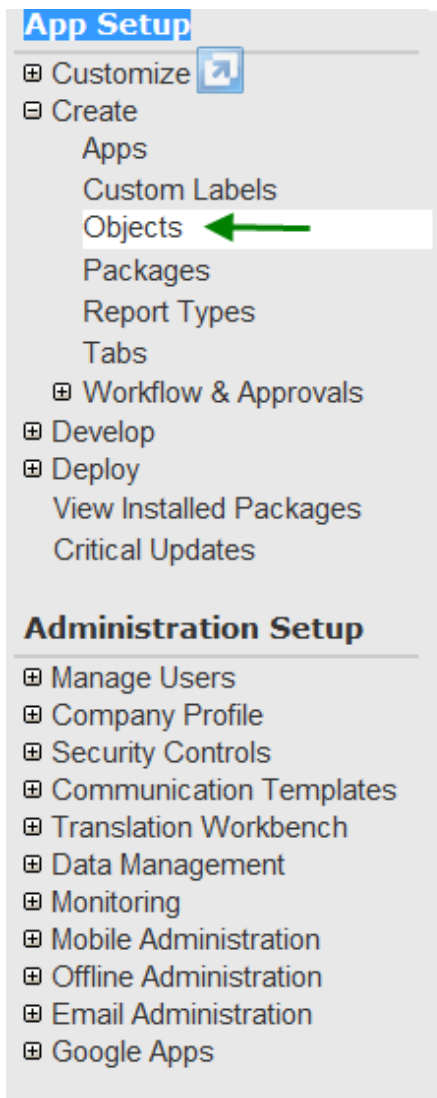
The following actions are required to complete your installation of Accorto Cloud T&E.

Override Standard Buttons

From the main Salesforce window, select Setup.



Navigate to **App Setup > Create > Objects**



Action	Label	Installed Package
Edit Del	Candidate	
Edit Del	Employment Website	
Edit	Fin Account	Accorto Cloud Plus
Edit	Fin Org	Accorto Cloud Plus
Edit Del	Job Application	
Edit Del	Job Posting	
Edit	Payment	Accorto Cloud Plus
Edit	Payment Line	Accorto Cloud Plus
Edit Del	Position	
Edit	Project	Accorto Cloud Plus
Edit	Resource	Accorto Cloud Plus
Edit Del	Review	
Edit	Statement	Accorto Cloud Plus
Edit	Statement Line	Accorto Cloud Plus
Edit	T&E Item	Accorto Cloud Plus
Edit	T&E Report	Accorto Cloud Plus
Edit	Tax	Accorto Cloud Plus
Edit	Tax Rate	Accorto Cloud Plus

- 1) Override New button for the Payment Object.
 - a) Double click the **Payment** Label to display the Payment Object window.

Standard Buttons and Links		
Action	Label	Name
<u>Override</u>	Payments Tab	Tab
<u>Override</u>	List	List
<u>Override</u>	View	View
<u>Override</u>	Edit	Edit
<u>Override</u>	Delete	Delete
<u>Override</u>	Clone	Clone
<u>Override</u>	New	New
<u>Override</u>	Accept	Accept

- b) Scroll down to the **Standard Buttons and Links** section and click **Override** for the New Button.

Override Properties Save Cancel

Label	New
Name	New
Content Type	<input type="radio"/> Custom S-Control <input checked="" type="radio"/> Visualforce Page
Content Name	PaymentSelection [accorto__PaymentSelection] ▼
Comment	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

Save Cancel

- c) In Content Type, select the Visualforce Page radio button.
- d) In Content name select 'PaymentSelection { Accorto_PaymentSelection]
- e) Click Save and return to the Payment Object window.

2) Override the Edit button for the Payment Object.

Standard Buttons and Links		
Action	Label	Name
<u>Override</u>	Payments Tab	Tab
<u>Override</u>	List	List
<u>Override</u>	View	View
<u>Override</u>	Edit ←	Edit
<u>Override</u>	Delete	Delete
<u>Override</u>	Clone	Clone
<u>Override</u>	New	New
<u>Override</u>	Accept	Accept

a) Scroll down to the **Standard Buttons and Links** section and click **Override** for the Edit Button.

Override Properties Save Cancel

Label Name Content Type Content Name Comment	Edit Edit <input type="radio"/> Custom S-Control <input checked="" type="radio"/> Visualforce Page PaymentSelection [accorto_PaymentSelection] ▼ ← <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>
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Save Cancel

- b) In Content Type, select the Visualforce Page radio button.
- c) In Content name select 'PaymentSelection [accorto_PaymentSelection]
- d) Click Save and return to the Payment Object window.

3) Override the New button for the Statement Object.

- a) Select Objects from the Apps Setup in the left menu.
- b) Double click the Statement label to display the Statement Object window

Standard Buttons and Links		
Action	Label	Name
<u>Override</u>	Statements Tab	Tab
<u>Override</u>	List	List
<u>Override</u>	View	View
<u>Override</u>	Edit	Edit
<u>Override</u>	Delete	Delete
<u>Override</u>	Clone	Clone
<u>Override</u>	New	New
<u>Override</u>	Accept	Accept

- c) Scroll down to the **Standard Buttons and Links** section and click **Override** for the New Button.

The screenshot shows the 'Override Properties' dialog box with the following fields:

- Label: New
- Name: New
- Content Type: Custom S-Control Visualforce Page
- Content Name: StatementNew [accorto_StatementNew]
- Comment: (empty text area)

Buttons: Save, Cancel (top and bottom)

- d) In Content Type, select the Visualforce Page radio button.
 - e) In Content name select 'StatementNew [accorto_StatementNew]
 - f) Click Save and return to the Statement Object window.
- 4) Override the New button for the T&E Report Object.
- a) Select Objects from the Apps Setup in the left menu.
 - b) Double click the TE Report label to display the TE Report Object window

Standard Buttons and Links		
Action	Label	Name
<u>Override</u>	T&E Reports Tab	Tab
<u>Override</u>	List	List
<u>Override</u>	View	View
<u>Override</u>	Edit	Edit
<u>Override</u>	Delete	Delete
<u>Override</u>	Clone	Clone
Override	New ←	New
<u>Override</u>	Accept	Accept

- c) Scroll down to the **Standard Buttons and Links** section and click **Override** for the New Button.

Override Properties Save Cancel

Label	New
Name	New
Content Type	<input type="radio"/> Custom S-Control <input checked="" type="radio"/> Visualforce Page
Content Name	TReportNew [accorto_ TReportNew] ▼ ←
Comment	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

Save Cancel

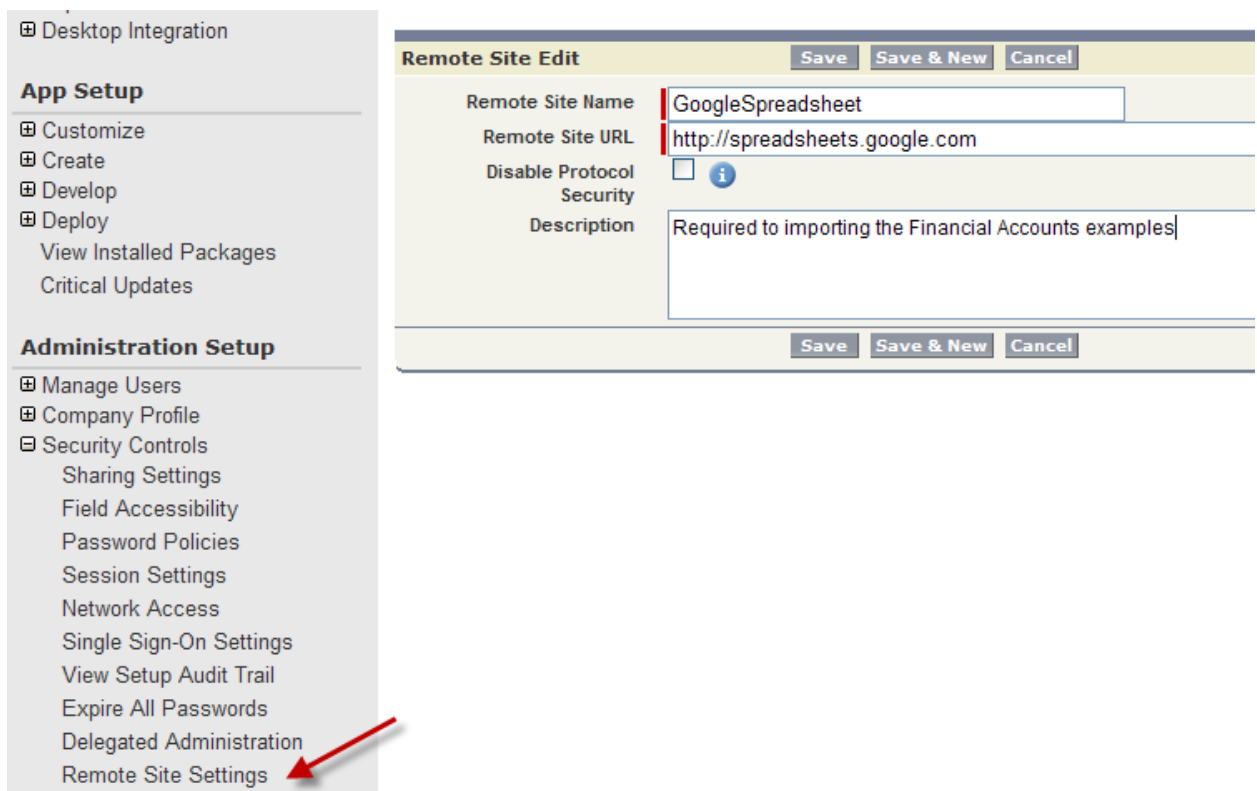
- d) In Content Type, select the Visualforce Page radio button.
- e) In Content name select 'TReportNew [accorto_ TReportNew]
- f) Click Save and return to the T&E Report Object window.

Optional Steps

The following actions are optional. They are required only if you will be importing the sample Chart of Accounts from Google docs or if you will be creating or updating T&E items via email.

Allow access to Google Docs

- 1) Navigate to **Administration Setup > Security Controls > Remote Sites**
 - Click the New Remote Sites button



- Enter a Remote Site Name of GoogleSpreadsheet
- Enter a Remote Site URL of <http://spreadsheets.google.com>
- Enter a Description
- Click Save

Allow access Email of T&E Items

- 1) Navigate to **App Setup > Develop > Email Services**
 - a) Click the New Email Service Button

The screenshot displays the Salesforce configuration interface for an email service. On the left, the navigation menu is expanded to 'App Setup' > 'Develop' > 'Email Services', with a green arrow pointing to 'Email Services'. The main configuration area is titled 'Email Service Information' and includes the following fields:

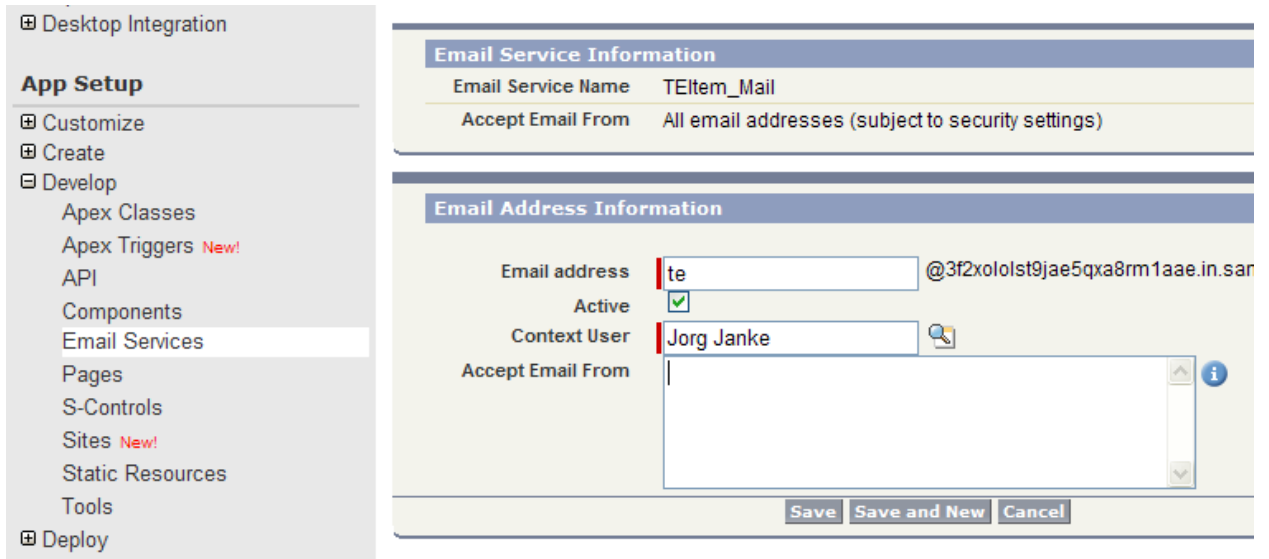
- Email Service Name:** TEItem_Mail
- Apex Class:** TEItemEmailHandler
- Accept Attachments:** All
- Advanced Email Security Settings:**
- Accept Email From:** (Empty text area)
- Active:**

Below this section is the 'Failure Response Settings' section, which allows configuring the system's response to various failure scenarios. All dropdown menus are currently set to 'Bounce message':

- Over Email Rate Limit Action:** Queue message
- Deactivated Email Address Action:** Bounce message
- Deactivated Email Service Action:** Bounce message
- Unauthenticated Sender Action:** Bounce message
- Unauthorized Sender Action:** Bounce message

Buttons for 'Save', 'Save and New Email Address', and 'Cancel' are visible at the top and bottom of the configuration panel.

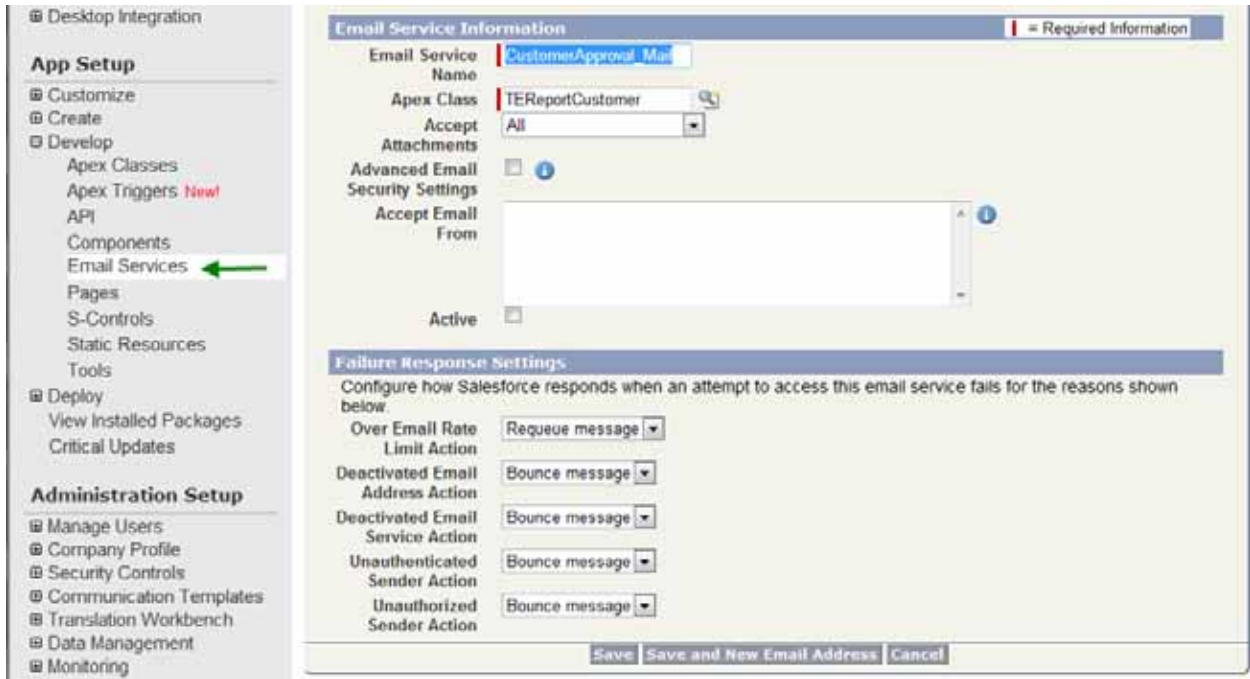
- b) Enter an Email Service name or TEItem_Mail
- c) Select the Apex Class of TEItemEmailHandler
- d) Set other options as displayed (or as appropriate for your organization)
- e) Click Save and New Email Address



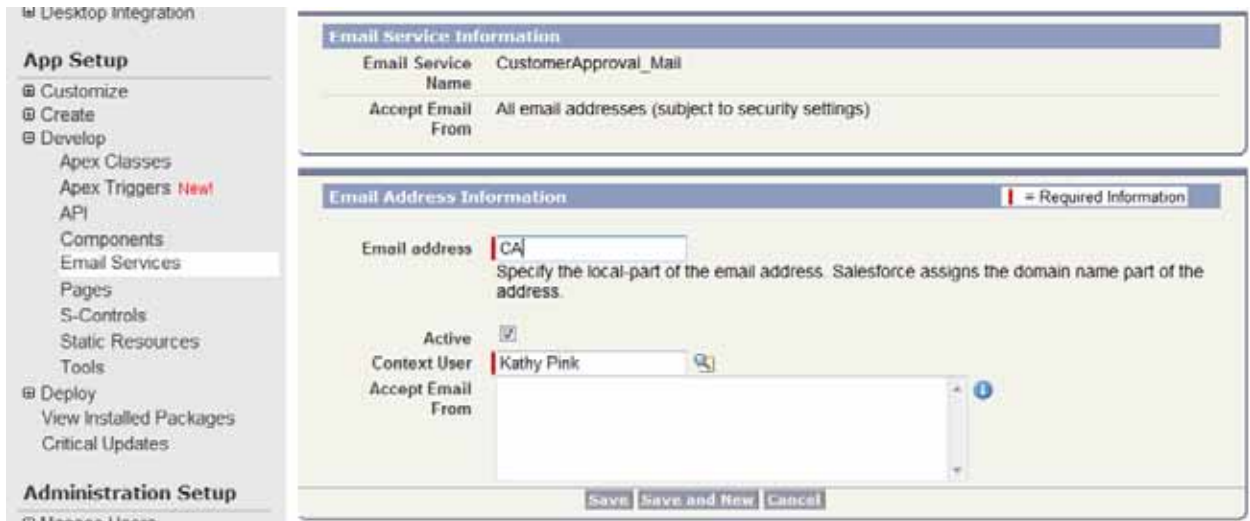
- a) Change the Email address to te
- b) Select a Context User
- c) Delete any email addresses in the Accept Email From box unless you want to restrict the users who can use this option.
- d) Confirm the configuration
 - i) In the first tab in the “Welcome” tab, you will now see the email address. If not, make sure that the Email address is “te”.
 - ii) You can set up a email address in your normal server and forward the mails to the address displayed. (so you do not need to remember the email address generated by Salesforce)
 - iii) If you do not receive the test emails, make sure that the “Accept Email From” fields are empty and that the “Advanced Email Security Settings” are de-selected. If it is working, we suggest to enable the security settings to reduce/prevent spam

Enable Customer Approval of T&E Reports via Email

- 1) Navigate to **App Setup > Develop > Email Services**
 - a) Click the New Email Service Button



- b) Enter an Email Service name of CustomerApproval_Mail
- c) Select the Apex Class of TEREportCustomer
- d) Set other options as displayed (or as appropriate for your organization)
- e) Click Save and New Email Address



- a) Change the Email address to CA (or any other desired value)
- b) Select a Context User

- c) Delete any email addresses in the Accept Email From box unless you want to restrict the users who can use this option.

Restrict self approval of T&E Reports

The T&E Reports window has a button "Approve Now". Users with access to page layouts that include this button can self approve T&E Reports. The default page layout includes this button. To remove the button complete the following:

- 1) Navigate to **App Setup > Develop > Objects**

Action	Label	Master Object	Deployed	Description
Edit	Fin Account		✓	Accorto Financial (natural) Account
Edit	Fin Org		✓	Accorto Financial Organization.
Edit	Payment		✓	Accorto Payment Selection
Edit	Payment Line	Payment	✓	Accorto Payment Selection lines
Edit	Project		✓	Accorto Project
Edit	Resource		✓	Accorto Resource
Edit	Statement		✓	Accorto Bank or Credit Card Statement
Edit	Statement Line	Statement	✓	Accorto Financial Institution Statement Line
Edit	T&E Item		✓	Accorto Time & Expense Item
Edit	T&E Report		✓	Accorto Time and Expense Report
Edit	Tax		✓	Accorto Sales or Value Added Tax
Edit	Tax Rate	Tax	✓	Accorto Tax Rates

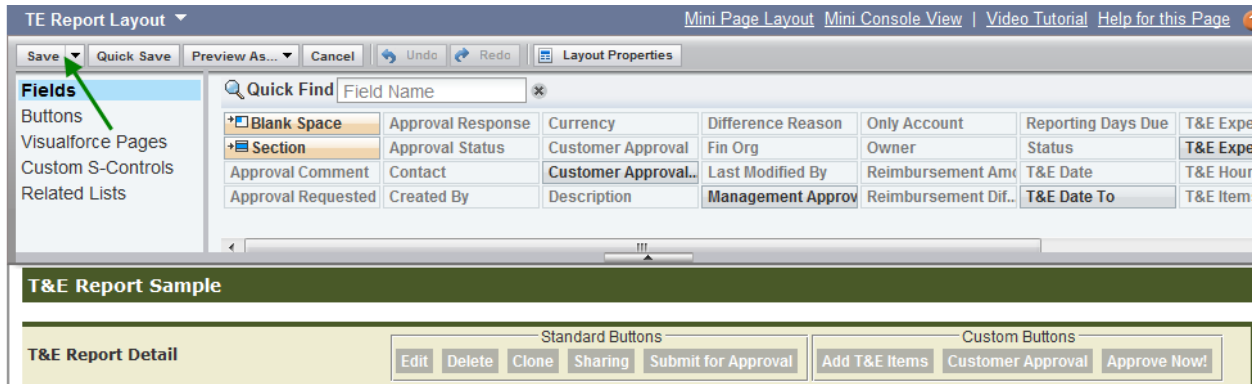
- a) Double click on the T&E Report Label field

Action	Page Layout Name	Created By	Modified By
Edit Del	TE Report Layout	Jorg Janke, 6/25/2009 1:04 PM	Jorg Janke, 8/24/2009 6:14 PM

- b) Scroll down the Page Layout related list.
- c) Click Edit

The screenshot shows the 'TE Report Layout' configuration interface. At the top, there are navigation links like 'Mini Page Layout', 'Mini Console View', 'Video Tutorial', and 'Help for this Page'. Below that is a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo'. The main area is divided into 'Fields' and 'Buttons'. The 'Fields' section contains a grid of fields including 'Approval Response', 'Currency', 'Difference Reason', 'Only Account', 'Reporting Days Due', 'T&E Expense', 'Approval Status', 'Customer Approval', 'Fin Org', 'Owner', 'Status', 'T&E Expense', 'Approval Comment', 'Contact', 'Customer Approval', 'Last Modified By', 'Reimbursement Amount', 'T&E Date', 'T&E Hour', 'Approval Requested', 'Created By', 'Description', 'Management Approval', 'Reimbursement Difference', and 'T&E Date To'. The 'Buttons' section is split into 'Standard Buttons' (Edit, Delete, Clone, Sharing, Submit for Approval) and 'Custom Buttons' (Add T&E Items, Customer Approval, Approve Now!). A green arrow points from the 'Approve Now!' button in the 'Custom Buttons' section to the 'Section' field in the 'Fields' grid.

- d) Click on the 'Approve Now' button and drag the button up to the gray section above.



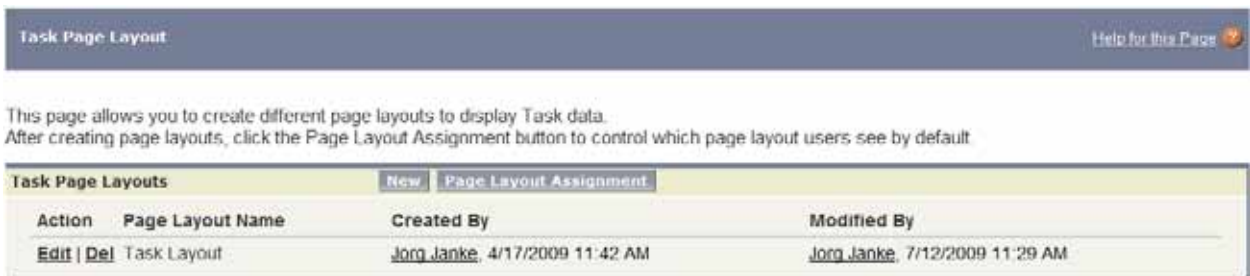
e) Don't forget to click Save to save your changes!

If specific users should be allowed to self approve, define a new page layout with the Approve Now button for their access or it can be defined in the approval process described below.

Allow creation of T&E Items from Cases, Activities, Tasks and Events

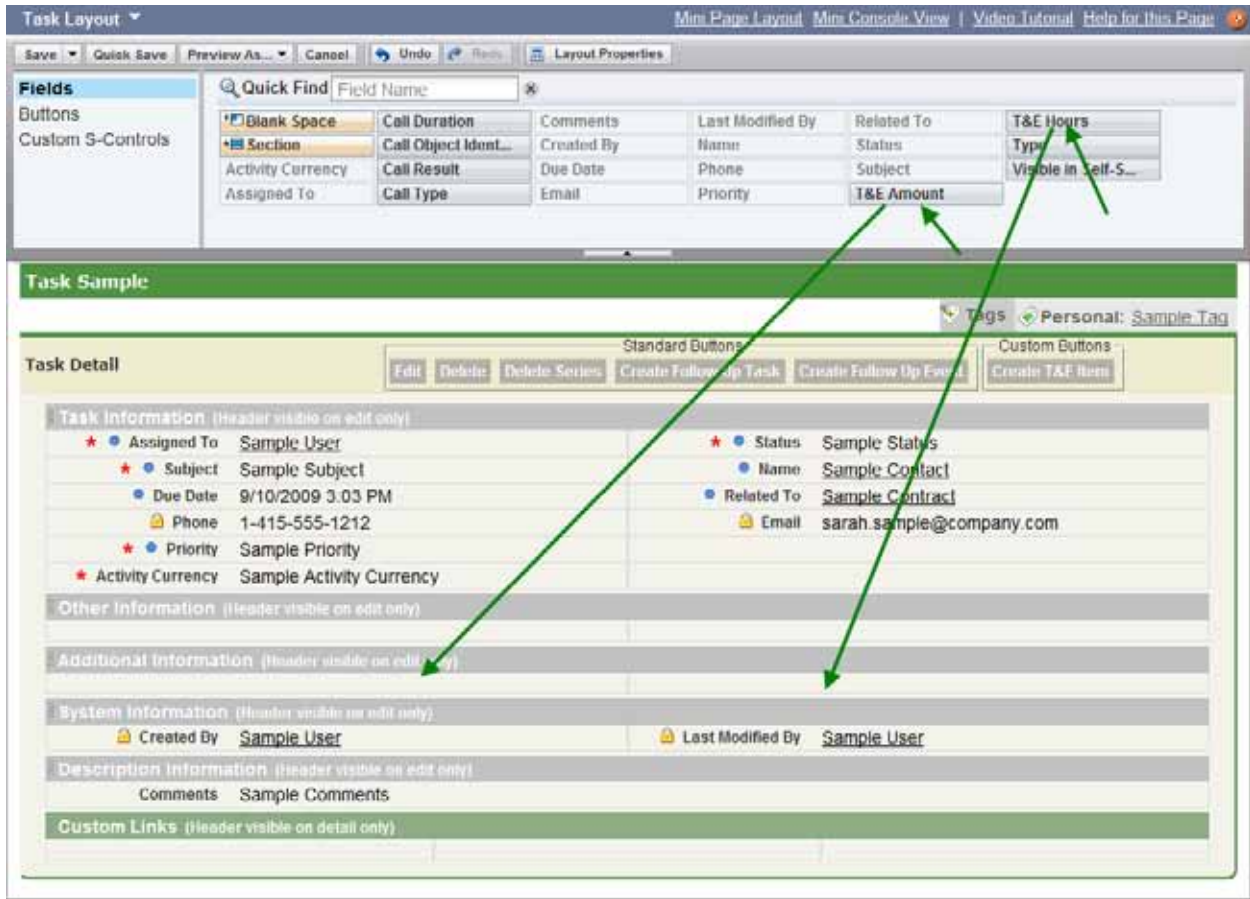
To allow creation of T&E Items from Cases, Activities, Tasks and Events you must add the fields T&E Hours and T&E Amount to the appropriate page layouts.

1) Navigate to **App Setup > Customize > Activities > Task Page Layouts**



a) Click Edit

Note: Depending upon your Salesforce CRM setup, you may have multiple page layouts. The same steps should be taken for each page layout as appropriate.



- b) Click on T&E Amount in the Fields section and drag to the Additional Information section in the Page Layout
- c) Repeat this for T&E Hours

Task Layout Mini Page Layout Mini Console View | Video Tutorial Help for this Page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons
Custom S Controls

Quick Find *

<input type="checkbox"/> Blank Space	Call Duration	Comments	Last Modified By	Related To	T&E Hours
<input checked="" type="checkbox"/> Section	Call Object Ident...	Created By	Name	Status	Type
Activity Currency	Call Result	Due Date	Phone	Subject	Visible in Self S...
Assigned To	Call Type	Email	Priority	T&E Amount	

Task Sample Tags Personal: Sample Tag

Task Detail Standard Buttons Edit Delete Delete Series Create Follow Up Task Create Follow Up Event Custom Buttons Create T Double-click to change tag set

Task Information (Header visible on edit only)

★ Assigned To <u>Sample User</u>	★ Status <u>Sample Status</u>
★ Subject <u>Sample Subject</u>	★ Name <u>Sample Contact</u>
★ Due Date 9/10/2009 3:03 PM	★ Related To <u>Sample Contract</u>
★ Phone 1-415-555-1212	★ Email sarah.sample@company.com
★ Priority <u>Sample Priority</u>	
★ Activity Currency <u>Sample Activity Currency</u>	

Other Information (Header visible on edit only)

Additional Information (Header visible on edit only)

T&E Amount <u>USD 123.45</u> ←	T&E Hours <u>693.15</u> ←
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System Information (Header visible on edit only)

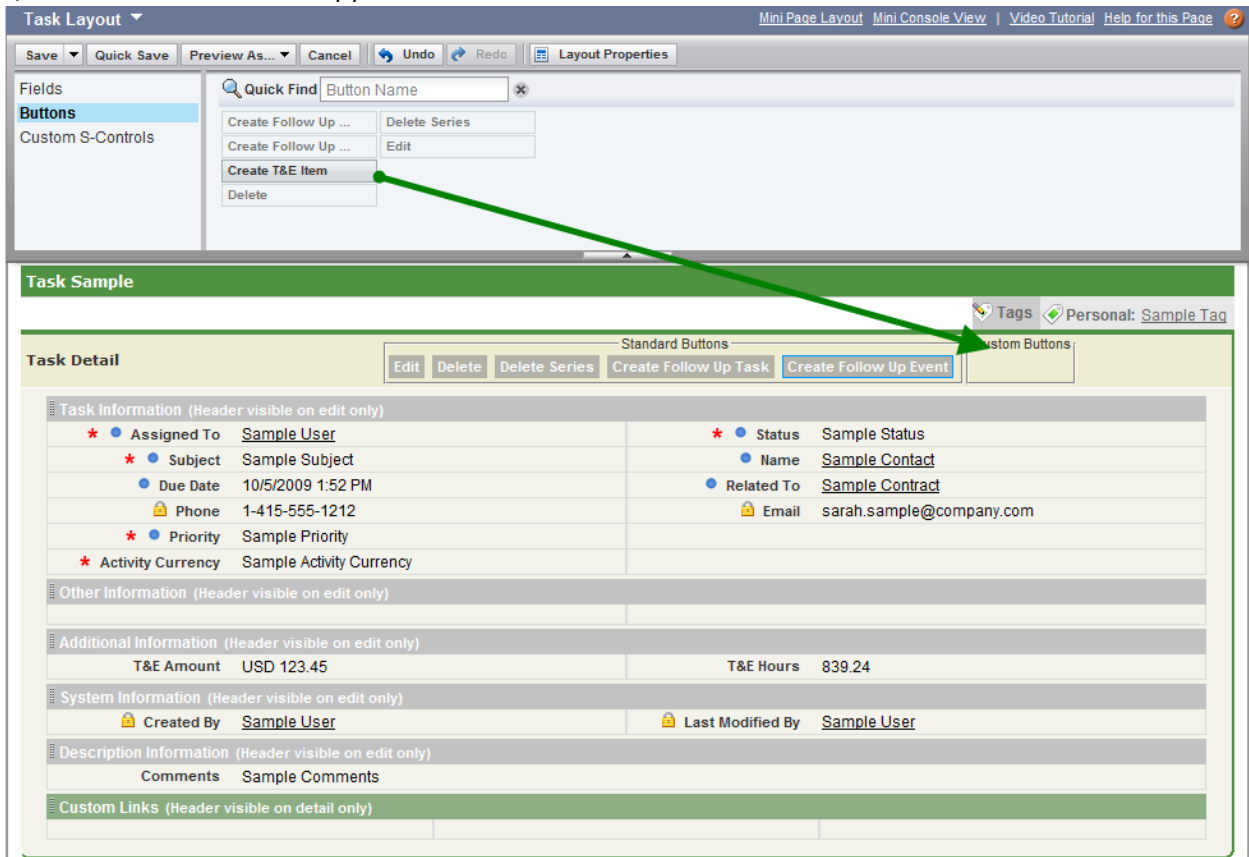
★ Created By <u>Sample User</u>	★ Last Modified By <u>Sample User</u>
---------------------------------	---------------------------------------

Description Information (Header visible on edit only)

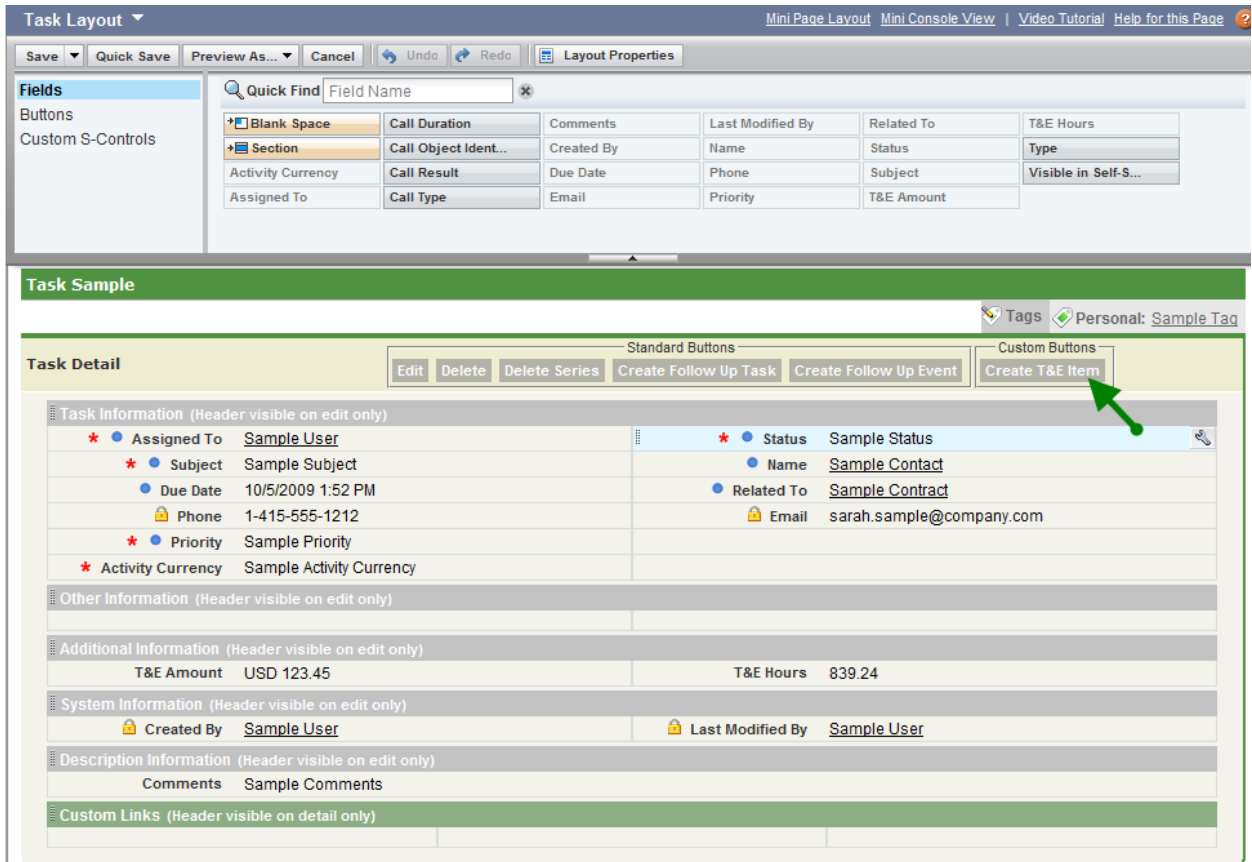
Comments Sample Comments

Custom Links (Header visible on detail only)

d) Click Buttons in the upper left section



e) Click on Create T&E Item in the Buttons and drag to the Custom Button section in the Page Layout



f) Click Save to save changes to the Page Layout.

- 2) Repeat these steps for the appropriate Page Layouts for **Activity – Event Page Layouts** and **Cases – Page Layouts**

Approval Workflow

Define Approval Workflow

- 1) Navigate to **App Setup > Create > Workflow & Approvals > Approval Process**

Manage Approval Processes For: T&E Report

A listing of both active and inactive approval processes for T&E Reports is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

- Use Jump Start Wizard
- Use Standard Setup Wizard

Active Approval Processes Reorder

No approval processes available

Inactive Approval Processes

No approval processes available

- a) Select T&E Report in 'Manage Approval Process for'.
- b) Click Create New Approval Process and select 'Use Standard Setup Wizard'

New Approval Process T&E Reports [Help for this Page](#)

Step 1. Enter Name and Description Step 1 of 6

Next Cancel

Enter a name and description for your new approval process.

Enter Name and Description | = Required Information

Process Name	T&E Report Approval
Unique Name	T_E_Report_Approval
Description	T&E Report Approval

Next Cancel

- a) Enter a Process name and Description
- b) Click Next

New Approval Process T&E Reports [Help for this Page](#) ?

Step 2. Specify Entry Criteria Step 2 of 6

Previous Next Cancel

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following criteria are met

Field	Operator	Value	
T&E Items	not equal to	0	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

[Advanced Options...](#)

Previous Next Cancel

- a) Select T&E Items in Field, an Operator of not equal to and value of 0 for the entry criteria.
- b) Click Next

New Approval Process T&E Reports [Help for this Page](#) ?

Step 3. Specify Approver Field and Record Editability Properties Step 3 of 6

Previous Next Cancel

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below.

Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By Manager

Use Approver Field of T&E Report Owner

Record Editability Properties

Administrators **ONLY** can edit records during the approval process.

Administrators **OR** the currently assigned approver can edit records during the approval process.

Previous Next Cancel

- a) Select Manager in the drop down list box
- b) Check the Use Approver Field of T&E Report Owner
- c) Check the Admin or current assigned approver can edit records during the approval process

- d) Click Next


New Approval Process T&E Reports Help for this Page ?

Step 4. Select Email Notification Template Step 4 of 6

Previous Next Cancel

Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process.

Approval Assignment

Approval Assignment Email Template 

Previous Next Cancel

- a) Select and Email Template of T&E Report Approval Request.
Note: Select the Accorto folder after clicking the lookup button
- b) Click Next





New Approval Process T&E Reports Help for this Page ?


Step 5. Select Fields to Display on Approval Page Layout Step 5 of 6

Previous Next Cancel

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Approval Page Fields


Available Fields		Selected Fields	
Customer Approval ReplyTo	Add  Remove 	T&E Report	Up  Down 
Description		Owner	
Difference Reason		T&E Date	
Fin Org		T&E Expense Amount	
Last Modified By		T&E Hours	
Management Approved			
Only Account			
Reimbursement Amount			
Reimbursement Difference			
Reporting Days Due			
Status			
T&E Date To			
T&E Expense Amount To			
T&E Items			



[Click here to view an example](#)

Display approval history information in addition to the fields selected above.

Security Settings

Allow approvers to access the approval page only from within the Salesforce application. (Recommended)
 Allow approvers to access the approval page from within the Salesforce application, or externally from a wireless-enabled mobile device. 

Previous Next Cancel

- a) Select the desired fields to display on the Approval page
- b) Select the appropriate Security Setting for your company
- c) Click Next

New Approval Process
T&E Reports [Help for this Page](#) ?

Step 6. Specify Initial Submitters Step 6 of 6

[Previous](#) [Save](#) [Cancel](#)

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

Initial Submitters

Submitter Type Search: for: [Find](#)

Available Submitters

--None--

Allowed Submitters

T&E Report Owner

Add

 Remove

Submission Settings

Allow submitters to recall approval requests

[Previous](#) [Save](#) [Cancel](#)

- a) Leave T&E Report Owner in the Allowed Submitters column
- b) Check Allow submitters to recall approval requests if appropriate
- c) Click Save

What Would You Like To Do Now? [Help for this Page](#) ?

You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?

- Yes, I'd like to create an approval step now.
- No, I'll do this later, take me to the approval process detail page to review what I've just created.
- No, I'll do this later, take me back to the listing of all approval processes for this object.

[Go!](#)

- a) Select Yes to create an approval step now
- b) Click Go

Define Approval Workflow Step

1) The following window displays

- a) Enter a Name and Description of T&E Report Approval
- b) Click Next

- a) Select All records should enter this step
 Note: If desired you could enter specific criteria where records would be 'auto approved'. Some examples are if the amount is less than 100.00 or for specific users.
- b) Click Next


New Approval Step [Help for this Page](#)


Step 3 of 3

[Previous](#) [Save](#) [Cancel](#)

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

- Automatically assign using the user field selected earlier. **(Manager)**
- Automatically assign to queue. 
- Automatically assign to approver(s).

The approver's delegate may also approve this request. 

[Previous](#) [Save](#) [Cancel](#)

- a) Select Automatically assign using the user field selected earlier.
- b) Click Save

What Would You Like To Do Now? [Help for this Page](#)

You have just created an approval step. You can optionally specify workflow actions to occur upon approval or rejection of this step. Would you like to do that now?

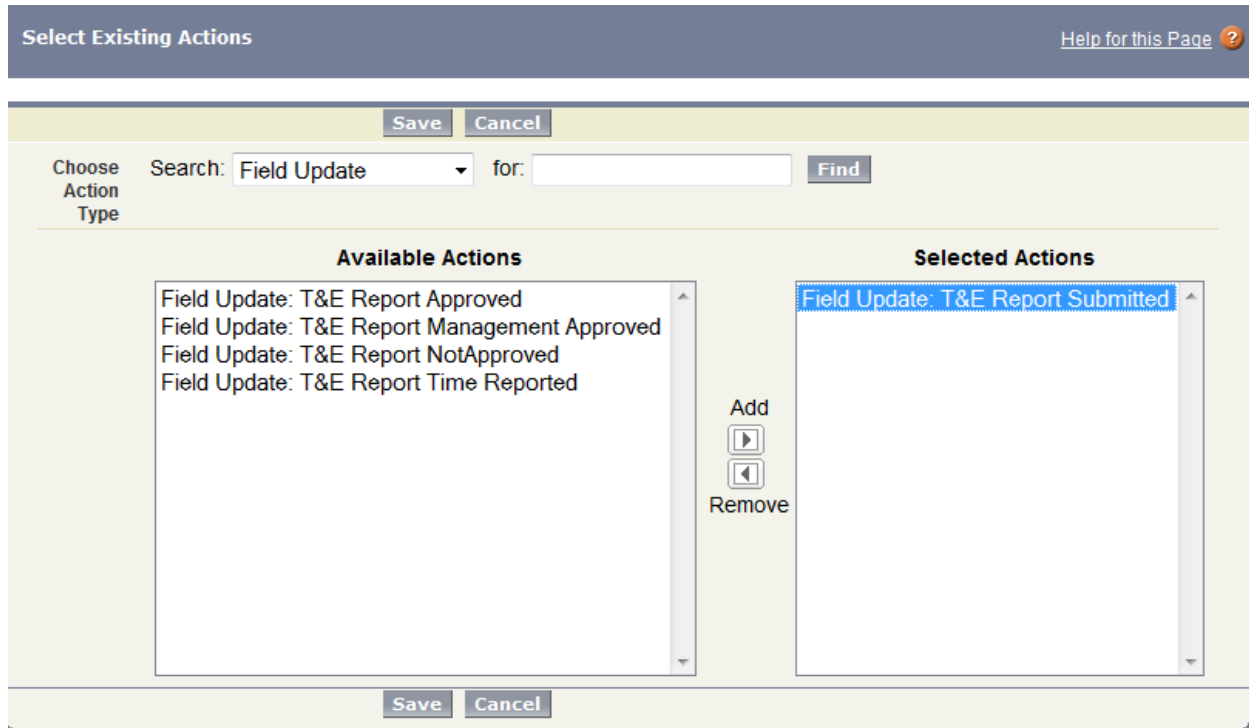
- Yes, I'd like to create a new approval action for this step now.
- Yes, I'd like to create a new rejection action for this step now.
- No, I'll do this later. Take me to the approval process detail page to review what I've just created.

[Go!](#)

- a) Select No, to creation of workflow actions.
- b) Click Go

Define Approval Actions

- 1) From the Initial Submission Actions related list click Add Existing



- a) Select Field Update
 - b) Add Field Update T&E Report Submitted to the Selected Actions column
 - c) Click Save
- 2) From the Approval Steps related list click Show Actions
 - a) From the Approval Actions related list click Add Existing

Select Existing Actions [Help for this Page](#)

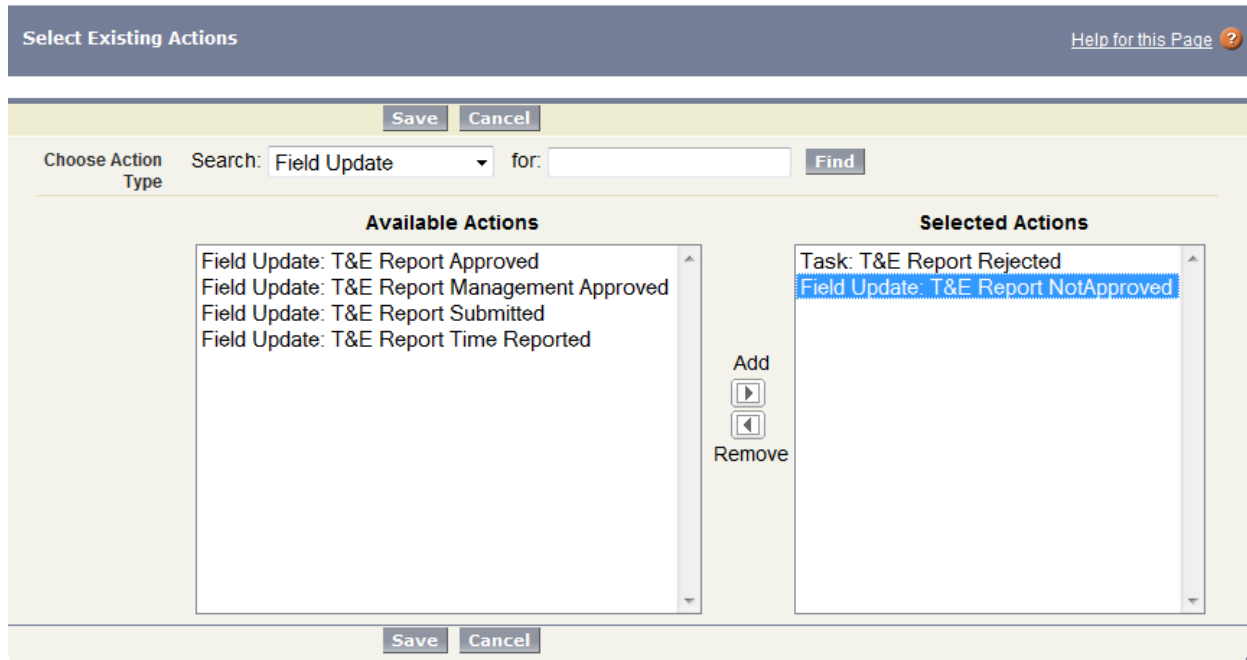
Save Cancel

Choose Action Type Search: for: Find

Available Actions		Selected Actions
Field Update: T&E Report Approved Field Update: T&E Report NotApproved Field Update: T&E Report Submitted Field Update: T&E Report Time Reported	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	Email Alert: T&E Report Updated Field Update: T&E Report Management Approved

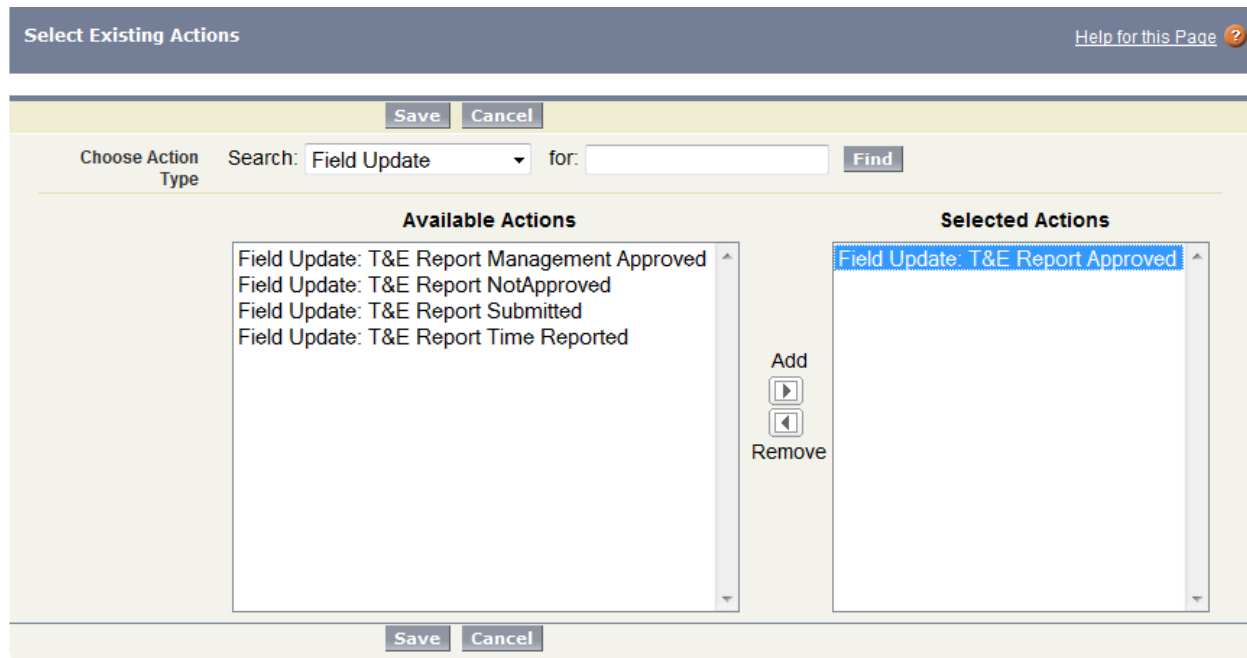
Save Cancel

- a) Select Email Alert
 - b) Add Email Alert: T&E Report Updated to the Selected Actions column
 - c) Select Field Update
 - d) Add T&E Report Management Approved to the Selected Actions column
 - e) Click Save
- 2) From the Approval Steps related list click Show Actions
- a) From the Rejection Actions related list click Add Existing



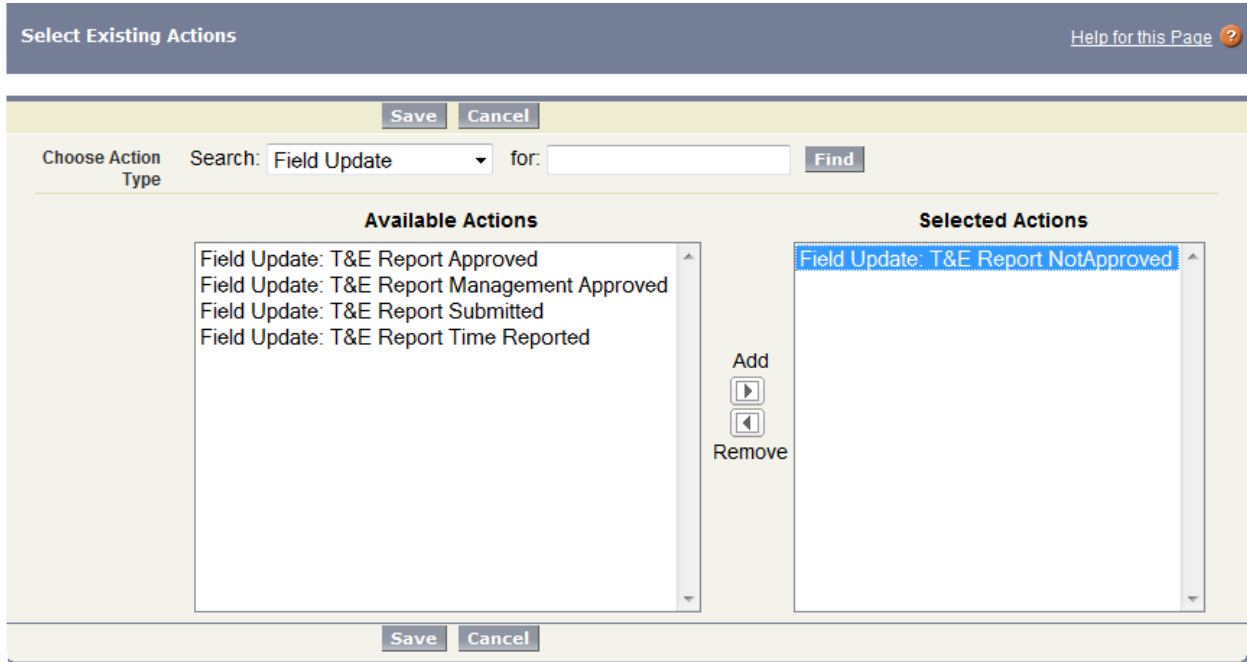
- a) Select Task
- b) Add Task: T&E Report Rejected to the Selected Actions column
- c) Select Field Update
- d) Add T&E Report NotApproved to the Selected Actions column
- e) Click Save

2) From the Final Approval Actions related list click Add Existing



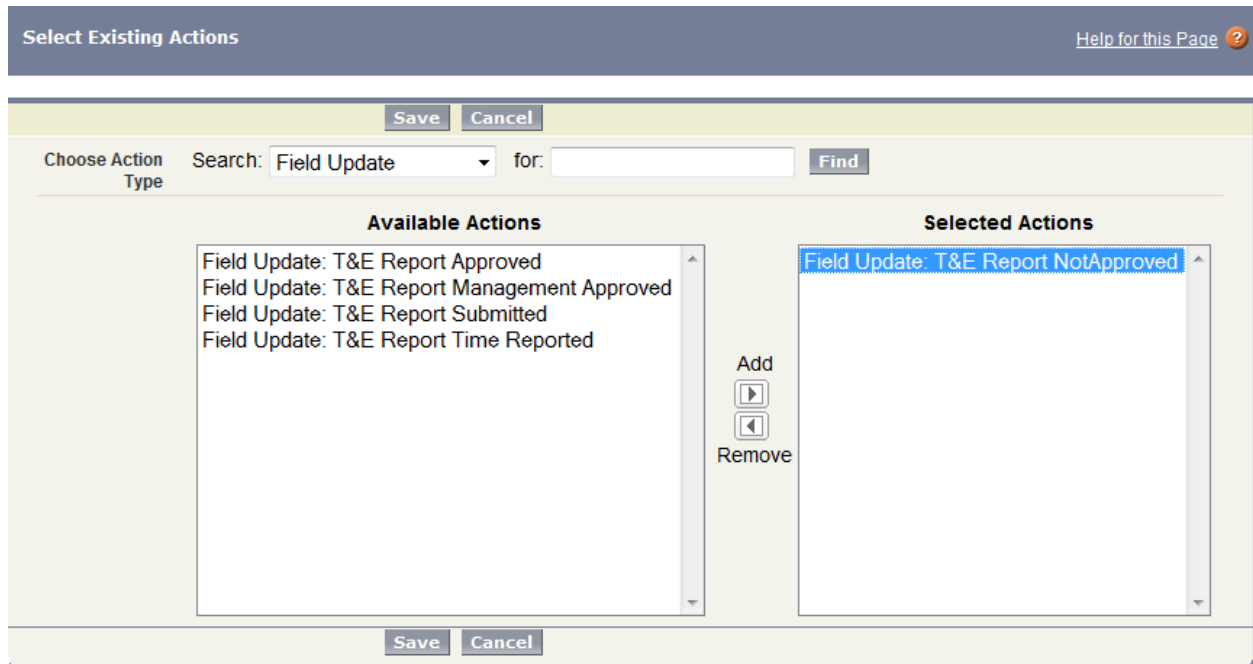
- a) Select Field Update
- b) Add Field Update T&E Report Approved to the Selected Actions column
- c) Click Save

2) From the Final Rejection Actions related list click Add Existing



- a) Select Field Update
- b) Add Field Update T&E Report NotApproved to the Selected Actions column
- c) Click Save

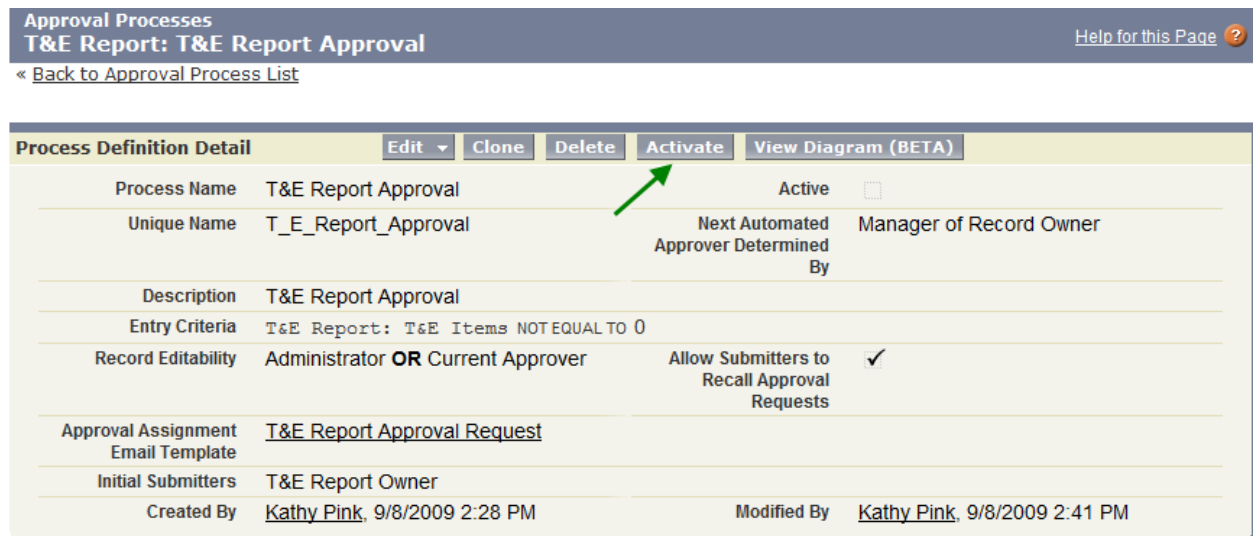
3) From the Initial Recall Actions related list click Add Existing



- a) Select Field Update
- b) Add Field Update T&E Report NotApproved to the Selected Actions column
- c) Click Save

Additional Workflow definitions

- 1) Activate the Workflow




- 2) Allow approval of T&E Reports via Email
 - a) Navigate to **App Setup > Create > Workflow & Approvals > Settings**

Workflow & Approvals Settings [Help for this Page](#) ?

Save **Cancel**

Specify the user Salesforce associates with a workflow rule if the user who invoked the rule is no longer active. Salesforce recommends choosing a user with system administrator privileges.

Default Workflow User 

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable Email Approval Response

By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.




Save **Cancel**

- b) Select a Default Workflow User
- c) Check the Enable Email Approval Response check box if appropriate
- d) Click Save

Add Overdue Alerts T&E Items and Reports

Note: Some options are only available if your T&E Policy (defined in Financial Organization) has Reporting Frequency defined.

- 1) Navigate to **App Setup > Create > Workflow & Approvals > Workflow Rules**

New Rule				
Action	Rule Name 	Description	Object	Active
Edit Activate 	Overdue T&E Item	T&E Item not reported yet - Add Time Trigger and select existing Actions - and activate	T&E Item	<input type="checkbox"/>
Edit Activate 	Overdue T&E Report	T&E Repot is due to be submitted - Add Time Trigger and select existing Actions - and activate	T&E Report	<input type="checkbox"/>

- a) Double click the Overdue T&E Item Rule Name
Note: If the Workflow Rule is Active you must Deactivate prior to editing.

Workflow Rule
Overdue T&E Item (Managed) [Help for this Page](#) ?

[« Back to List: Workflow Rules](#)

This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail		Clone	Activate
Rule Name	Overdue T&E Item	Object	T&E Item
Namespace Prefix	accorto	Evaluation Criteria	When a record is created, or when a record is edited and did not previously meet the rule criteria
Installed Package	Accorto Cloud Plus		
Active	<input type="checkbox"/>		
Description	T&E Item not reported yet - Add Time Trigger and select existing Actions - and activate		
Rule Criteria	(T&E Item: Reporting Days Due greater than 0) AND (T&E Item: Status equals New,Not Approved,Completed)		
Created By	Kathy Pink , 9/4/2009 10:57 AM	Modified By	Kathy Pink , 9/4/2009 10:57 AM

Workflow Actions [Edit](#) ←

Immediate Workflow Actions
 No workflow actions have been added.

Time-Dependent Workflow Actions
 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

b) Click the Edit button in the Workflow Actions section

Step 3: Specify Workflow Actions Step 3 of 3

[Done](#)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(T&E Item: Reporting Days Due greater than 0) AND (T&E Item: Status equals New,Not Approved,Completed)
Evaluation Criteria	When a record is created, or when a record is edited and did not previously meet the rule criteria

Immediate Workflow Actions
 No workflow actions have been added.
[Add Workflow Action](#) ▾

Time-Dependent Workflow Actions [See an example](#)
 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.
[Add Time Trigger](#) ←

c) Click the Add Time Trigger button in the Time Dependand Workflow Actions section

Add Time Trigger
T&E Item [Help for this Page](#) ?

Workflow Time Trigger Edit

Workflow Rule: Overdue T&E Item

Days Rule Trigger Date ▾

[Save](#) [Cancel](#)

- d) Enter the desired number of days after the T&E due date when the alert should be sent.
- e) Repeat this process for the Overdue T&E Report Rule.