Approvals

202411.1.0 Preview Release

Get early access to the latest features and improvements.

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Trigger an approval request for any object in the Conga Revenue Lifecycle Cloud and send email or in-app notifications to concerned stakeholders.

Approvals Release Notes

Discover what's new in the latest release of Conga Approvals.

Conga Approvals for Conga Platform 202411.1.0 Release Notes

In these release notes, you can find new features and enhancements and fixed and known issues for the Approvals 202411.1.0 release. For documentation updates, see What's New in Approvals Documentation.

> This documentation may describe optional features for which you have not purchased a license; therefore your solution or implementation may differ from what is described here. Contact your customer success manager (CSM) or account executive (AE) to discuss your specific features and licensing.

To access the learning path, including overviews and demonstrations of this release’s updated features and enhancements, visit the Conga Learning Center.

System Requirements and Supported Platforms

For requirements and recommendations to consider before installing the Conga product suite, see the System Requirements and Supported Platforms Matrix.

New Features and Enhancements

The following features are new to Conga Approvals in this release.

Manual Escalation Button to My Approvals Page

A manual Escalate button has been introduced on the My Approvals page, enabling you to escalate approval requests with confirmation. See My Approvals for user configurations and Approval Rules for administrative configurations.

Bounce-Back Email Notifications for Approval Submissions

When you click Submit button on the My Approvals page, bounce-back emails will notify you of issues like invalid keywords, missing mandatory comments, or duplicate actions on already processed requests. Refer Approvals Bounce-Back Email Scenarios for more. Administrators can configure these templates to customize messaging for each scenario. Refer Configuring the Settings Window for admin settings.

Fixed Issues

There are no fixed issues in this release.

Known Issues

There are no known issues in this release.

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What's New in Approvals Documentation

This section lists changes in the documentation to support each release.

202411.1.0

Release	Topic	Description
202411.1.0	Configuring the Settings Window	New Feature.
	Approvals Bounce-Back Email Scenarios	New Feature.

202410.2.0

Release	Topic	Description
202410.2.0	Approval Search Filters	New Feature.

202410.1.0

Release	Topic	Description
202410.1.0	Configuring the Approvals User Interface	Added Approver Stepper Stye in Approval System Properties.
	Approval Flows	Added Display Header Fields and Display Fields for Approval Flows.

202409.2.0

Release	Topic	Description
202409.2.0	N/A	No changes in the document.

202409.1.0

Release	Topic	Description
202409.1.0	Approval Rules	Added match rule type for Dimension Rule Type.

202408.3.0

Release	Topic	Description
202408.3.0	• Create an approval process step • Save an approval rule entry	The API has been extended to support picklists for custom users and custom queues.
	Get approval request comments	The Get approval request comments API now returns all approval request activity associated with a business object, unless you specify RequestId (optional).
	Configuring the Approvals User Interface	Approvals system properties (Suppress Queue Emails and Add Approver Enabled) are now available and can be configured in a graphical user interface.

202408.2.0

Release	Topic	Description
202408.2.0	To create a new rule	When creating a new rule, you can add dimensions as well as conditions. You can now also search for dimensions and create new ones.

202408.1.0

Release	Topic	Description
202408.1.0	Rule Dimensions	The Rule Dimensions API (/approvals/v1/rule-dimensions) DataSource, BusinessObject, and DimensionType parameters are modified to support the Formula data type (object.field.sub-field) in the ApprovalRuleDimension response field.

Release	Topic	Description
	• Process Steps • Rule Entries	When you create an entry criterion for a step entry within a flow or rule, or an auto-approval within a flow or rule step, the logical expression (equation) now supports dynamic values on the right-hand side.

202407.2.0

Release	Topic	Description
202407.2.0	• To create an approval flow • To create or edit rule entries • Configuring Custom Users and Queues	Custom Queue assignee/object type is now available.
	• Get system properties • Update system properties	SuppressQueueEmails parameter added to Approvals/System Properties APIs

202407.1.1

Release	Topic	Description
202407.1.1	Standard-Step Options	New information about User, Custom User, Related User, Queue, and Custom Queue assignee/object types.
	Submitting an Approval Request	Added information clarifying the finality of submissions.

202406.2.0

Release	Topic	Description
202406.2.0	To recall an approval	When the user recalls a cart approval, the approval is canceled and the quote's approval status and approval stage field become Cancelled and Approval Required, respectively, maintaining functional parity with Salesforce.

Release	Topic	Description
	To create or edit rule entries	You can now develop more granular escalation and reminder flows that reach individual rule assignees (approvers), rather than entire rule-entry-level recipient classes.
	To add a related user to a rule entry	In the Approval Rule context, the administrator can select a related-user assignee for the system to pick up at runtime and can enter a string that serves as a dot-notation leading to the user field from the context object. Both out-of-the-box and custom fields are supported and up to five levels of object relationship may be traversed.
	To add a related user to a flow entry	In the Approval Flow context, the administrator can select a related-user assignee for the system to pick up at runtime and can enter a string that serves as a dot-notation leading to the user field from the context object. Both out-of-the-box and custom fields are supported and up to five levels of object relationship may be traversed.

202406.1.0

Release	Topic	Description
202406.1.0	N/A	Bug fixes only

202405.2.0

Release	Topic	Description
202405.2.0	N/A	Bug fixes only

202405.1.0

Release	Topic	Description
202405.1.0	N/A	Bug fixes only

202404.2.0

Release	Topic	Description
202404.2.0	Searching and Sorting List Entries	Improvements to search and filter features documented.

202404.1.0

Release	Topic	Description
202404.1.0	To edit an approval flow	Added a note concerning revisions to approval flow when all steps are deleted.

202403.3.0

Release	Topic	Description
202403.3.0	Recalling an Approval	Approve, Reject, Reassign, and Recall button behavior changed. Changes are self-explanatory, so no updates to documentation.

202403.1.0

Release	Topic	Description
202403.1.0	My Approvals	Improved record search, sort, and filter in the user interface.

February '24

Release	Topic	Description
February 2024	Approvals for Users	• Updated user flows. • Added documentation for recalling approvals.

January '24

Release	Topic	Description
January 2024	Approvals for Administrators	New document, introducing Approval Flows and Approval Rules.

October '23

Release	Topic	Description
October 2023	All	New product.

About Conga Approvals

Conga Approvals enables you to trigger an approval request for any object and send an email notification to concerned stakeholders. Using Approvals, you can set an approval request on an object header, line item, or both. After an approval request is triggered, an approver can approve or reject a request via email.

Approvals for Conga Platform is a modular application on the Conga Revenue Lifecycle Platform that supports approval processes across several use cases. You can use Approvals to review, approve, reject, or reassign business objects from the Conga cloud user interface or from emailed notifications. You can use Approvals to support the revenue lifecycle management use case. Contract lifecycle management (CLM) is slated for introduction later in 2024.

Users access Conga Approvals from another product's flow. In early implementation, this means users from Conga's Revenue Lifecycle Platform product can access Approvals for such objects as carts, prices, price adjustments, and the like. When Conga CLM on Conga Cloud adds Approvals capability, objects will include such contract-lifecycle-based issues as contract ownership, effective dates, terms, conditions, etc. The Approvals interface accommodates these differing predicates without issue.

Available user views are:

- Preview and Submit
- My Approvals

To set up Approvals, administrators can access:

- Approval Flows
- Approval Rules

Approvals for Administrators

This section describes how Conga Approvals works and provides administrators with information on setting up approvals within Conga Approvals. It also covers the most common use cases for administration. Conga Cloud products require access to an Internet-connected browser.For a comprehensive list of updates to this guide for each release, see What's New in Approvals Documentation.

See Approvals for Users for information on Approvals workflow and use cases.For access to our interactive REST API documentation, visit the Conga Developer Hub. This section describes the following tasks:

- Approval Flows
- Approval Rules

Before using Approvals, you must be familiar with Conga terms and definitions

Select one of the following topics for more information:

- Supported Features in Approvals
- Configuring the Approvals User Interface
- Approval Custom Configurations
- Configuring the Approval Workflow
    - Approval Flows
        - Configuring the Settings Window
    - Approval Rules
- Approval Search Filters

Supported Features in Approvals

Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
Approval Process	Process Entry criteria	Fields/ Values	Yes	Yes	Yes
		Filter Logic	Yes	Yes	Yes

Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
		Formula Fields(Approvals)	Yes	No	No
	Continue pending approvals on reject		Yes	Yes	Yes
	Consolidate Notifications		Yes	Yes	Yes
	Consolidate Approvals	With Dependency	Yes	Yes	Yes
		Without Dependency	Yes	Yes	Yes
		With Adhoc Approver	Yes	Yes	Yes
	Backup admin		Yes	Yes	Yes
	Comments	Submission Comments Enabled	Yes	Yes	Yes
		Submission Comments Mandatory	Yes	Yes	Yes
		Approval Comments Mandatory	Yes	Yes	Yes
		Rejection Comments Mandatory	Yes	Yes	Yes

Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
		Recall Comments Enabled	Yes	Yes	Yes
		Process Level Comments	Yes	Yes	Yes
		Step Level comments	Yes	Yes	No
	Initial Submission Action		Yes	Yes	Yes
	Final Approval Action		Yes	Yes	Yes
	Final Rejection Action		Yes	Yes	Yes
Approval Steps	Step type	Standard Step	Yes	Yes	Yes
		Subprocess Step	Yes	Yes	Yes
		ChildProcess Step	Yes	Yes	Yes
	Step Dependency		Yes	Yes	Yes
	Step Assignee type	user	Yes	yes	Yes
		role	Yes	No	No
		queue		yes	Yes

Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
		custom user	Yes	yes	No
		custom role	Yes	No	No
		custom Queue	Yes	No	No
		related user	Yes	yes	No
	Step Entry Criteria	Without Child Filter	Yes	Yes	Yes
		With Child Filter LHS RHS	Yes	Yes	No
	Reapproval		Yes	Yes	Yes
		Prior values	Yes	No	No
		Constant values	Yes	yes	Yes
		LHS RHS child filters	Yes	No	No
		Formula Fields(Approvals)	Yes	No	No
	Auto complete		Yes	Yes	Yes
	Auto escalate		Yes	Yes	Yes
	Send Email		Yes	Yes	Yes

Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
	Notify Only		Yes	Yes	Yes
	Skip unresolved assignee		Yes	Yes	Yes
	carbon copy feature		Yes	Yes	Yes
	Reminder		Yes	Yes	Yes
Approval Rule	Rule Entry criteria	Without Dependency	Yes	Yes	Yes
		With Dependency	Yes	Yes	Yes
	Rule Assignee type	user	Yes	Yes	Yes
		role	Yes	No	No
		queue	Yes	Yes	Yes
		custom user	Yes	Yes	No
		custom role	Yes	No	No
		custom Queue	Yes	No	No
		related user	Yes	Yes	No
	Approval Policies + continue pending approvals	majority	Yes	Yes	Yes
		quorum	Yes	Yes	Yes

Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
		percentage	Yes	Yes	Yes
		unanimous	Yes	Yes	Yes
	Rule Condition	Fields/ Values	Yes	Yes	Yes
		Formula Fields(Approvals)	Yes	No	No
	Rule Dimensions		Yes	Yes	No
	Rule Entries	Condition	Yes	Yes	Yes
		Reapproval	Yes	Yes	Yes
		Dependency	Yes	Yes	Yes
		Include Previous	Yes	Yes	No
		Assignee	Yes	Yes	Yes
		Auto Complete	Yes	Yes	Yes
		Notify Only	Yes	Yes	Yes
		Send Email	Yes	Yes	Yes
		Skip Assignee	Yes	Yes	Yes
Runtime	Display fields		Yes	Yes	Yes
	Adhoc approver		Yes	Yes	No

Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
	Adhoc process without attachment		Yes	No	No
	Adhoc process with attachment		Yes	No	No
	Reassign		Yes	Yes	Yes
	MyApproval Page		Yes	Yes	Yes
		Audit History	Yes	No	No
	Preview and Submit Page		Yes	Yes	Yes
		Delegates	Yes	No	No
	Submit with attachment (You can upload files up to 15 MB in Conga Platform)		Yes	Yes	Yes
Search Filter approvals			Yes	Yes	No
Backup delegate	Backup		Yes	Yes	No
	Delegate		Yes	Yes	No
	Out of Office		Yes	No	No
	Multiple backup delegate		Yes	Yes	No

Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
	Supress Delegate Notifiction		Yes	Yes	No
	EffectiveDate/ Expiration date		Yes	Yes	No
	Transfer In flight		Yes	No	No
Email Approvals	Approve / Reject		Yes	Yes	Yes
	Notify Email		Yes	Yes	Yes
	Escalation/ Reminder		Yes	Yes	Yes
	Reassign		Yes	Yes	Yes
	auto approval		Yes	Yes	Yes
	recall		Yes	Yes	Yes
	bounce back email		Yes	No	No
	Templates	Default templates	Yes	Yes	Yes
		Custom templates	Yes	Yes	Yes
Bulk actions	Approve / Reject/ Recall		Yes	Yes	Yes
Async			Yes	No	No

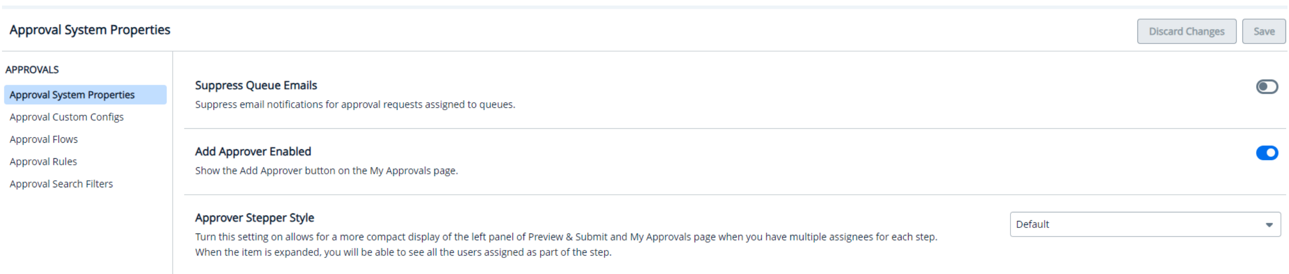
Feature	Sub-Feature	Related Functionalities	Supported in Salesforce Classic	Supported on Conga Platform (API)	Supported on Conga Platform (UI)
Deeplink support in email			Yes	No	No
Approval Center			Yes	No	No
Flowchart Representation			Yes	NA	NA
Custom settings			Yes	No	No

Configuring the Approvals User Interface

Approvals's initial view affords administrators the ability to configure the Approvals user interface or to configure Approvals workflows.

To configure workflows, see Configuring the Approval Workflow.

You can access the Approval System Properties page from the top level of Approvals. From Conga Start, click the Switch Apps (waffle) icon at top left, then select **Approvals** under Shared Apps to raise the Shared Apps page, open to Approval System Properties (default selection).



From here, you can change settings for Suppress Queue Emails and Add Approver Enabled.

Suppress Queue Emails

This setting, when enabled, prevents email notification of an approval request when the recipient is a queue, rather than an individual user.

Add Approver Enabled

This switch activates the Add Approver button on the users' My Approvals page.

Approver Stepper Style

This setting allows admin to choose between a Default or Compact view for the left panel in the Preview and Submit and My Approval*s* pages. The Compact view provides a streamlined display, ideal when there are multiple assignees per step, while the Default view presents the full details without needing to expand.

Approval Custom Configurations

You can use custom approval settings to define specific configurations for any object, including custom objects, in Conga Platform. The Object for Custom User feature enables selecting standard or custom object names to define custom assignee expressions. This ensures that approval workflows can be customized for each object, allowing for more precise and automated user assignments based on the object's specific approval requirements.

To create an approval custom config

1. Go to **Shared Apps** > **Approvals** > **Approval Custom Configs**.
2. Click **Create** to add a custom object.
3. Search for a custom object name in the **Custom Object Name** field.
4. Click **Create**.
5. Click the custom object name to define custom assignee expressions.
6. Select the names of standard or custom objects from the pull-down.
7. Click **Save**, creating the new custom setting object.

To edit an existing approval custom config

1. Open the Approval Custom Configs tab as described in To create an approval custom config.
2. Click the name of the custom object.
3. Select the names of standard or custom objects to add or remove from the pull-down. To add an object, click the box next to it in the pull-down menu. To delete an object, click the object count indicator at the right of the drop-down menu box and click the X adjacent to the undesired object.
4. Click **Save**.

To delete an approval custom config

1. Open the Approval Custom Configs tab as described in To create an approval custom config.
2. Find the custom object name in the Custom Object column.
3. Click the trash-can ( ) icon adjacent to the custom object.
4. A confirmation popup appears. Click **Delete**.

Configuring the Approval Workflow

This section provides the workflow and the sequence of actions you must define to enable Approvals.

To configure Approvals, you must establish a sequence of approvals, each step of which enacts predefined rules.

Approval Flows describes how to build the sequence of steps that compose an approval flow.

Approval Rules describes how to define the approval rules enacted at each step in the approval flow.

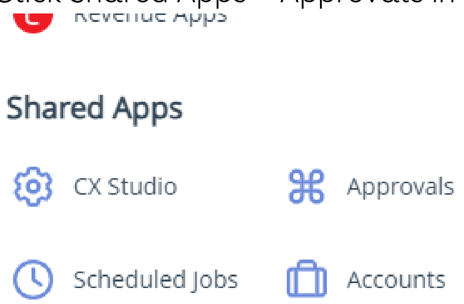
> **Note**
>
> When configuring email service, disable outbound rules on your mail server that might drop an original email.

Approval Flows

The Approval Flows screen orders approval flows for convenient review and maintenance. From this screen you can find and select approval flows for review and create, edit or delete flows. Flows consist of reviewers and rules being applied in a defined order. See Approval Rules for more on these predefined criteria.

To access the Approval Flows window

1. Click Shared Apps > Approvals in the left navigation bar:

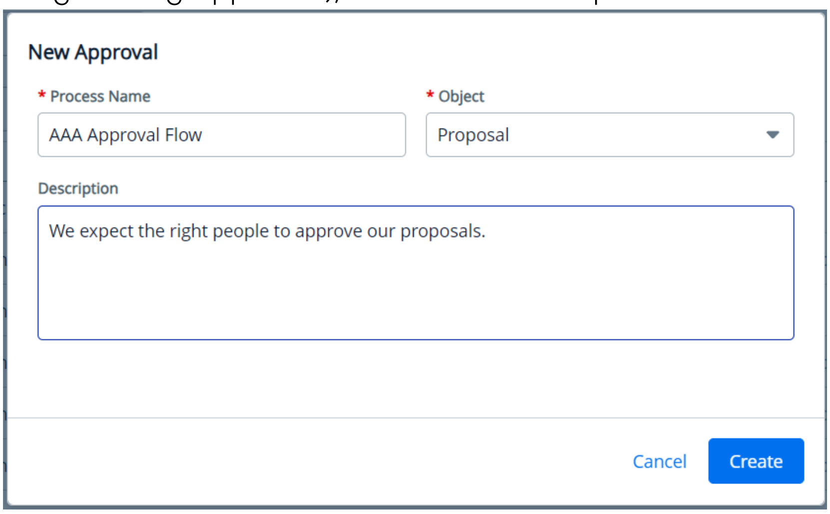


2. If the Approval Flows window does not open by default, click **Approval Flows** from the left-side menu to open it.

From here, you can create, edit, or delete an approval flow.

To create an approval flow

1. Click the **Create** button.
2. In the New Approval dialog box, enter the process name, the object type (what sort of thing is being approved), and a brief description of the new approval flow.



3. Click **Create**, opening the Approval Flows window to the Setup tab.

4. An approval process consists of at least one step, with a person or procedure deciding whether and where the next step, if any, will occur. For each step, click the step box in the Setup window or the plus button in the appropriate location in the Approval Flows Setup window.
5. For each step:
    a. You must name the step: enter a step name in the **Step Name** field.
    b. You may describe the step: enter a brief description in the **Step Description** field.
    c. You must define the step type: select whether the step is a standard step, a child process, or a sub-process by selecting from the **Step Type** pull-down menu. When you do this, additional options will appear based on the step type you have selected.
        i. Selecting the Standard step type raises the required Assignee Type and Assignee fields, and the optional Assignee Description field. You can assign to a user, custom user, related user, or queue. Selecting the Standard step type also offers toggles for: Step Auto Complete, Send Email, Notify Only, Skip Unresolved Assignee, and Step-Level Comments. See Standard-Step Options.
        ii. Selecting the Child Process step type raises the required Context Object and Approver Rule fields. See Child Process Step Options.
        iii. Selecting the Sub Process step type raises the required Approver Rule field. See Sub-Process-Step Options.
    d. Flip the **Step Level Comments** toggle to enable reviewers to make comments when they interact with this step in the approval flow.
    e. You can search user names in the **Carbon Copy** (cc) field to nominate notification recipients.
    f. You can shape the flow using the **Step Dependencies** field to select a dependency that must be fulfilled before a given step can occur. A step dependency is a step that must be completed before the present (dependent) step becomes active. If a flow is established without dependencies, all flow steps occur simultaneously. Using this logic, you can give two different steps a common dependency to make them occur at the same stage (parallel processes) in a flow.
    g. Click **Add Display Header Fields** to configure Display Header Fields:
        i. Select up to three fields to display on the left pane of the **My Approvals** page for this step.
        ii. After selecting the fields, click the **Add** button.
        iii. Click **Insert** to apply the selected fields.
    h. Click **Add Display Fields** to configure Dispplay Fields:
        i. Select up to six fields to display on the right pane for the approval step.

   ii. After selecting the fields, click the **Add** button.
   iii. Click **Insert** to apply the selected fields.
6. When you have completed the flow, click **Save**.

Standard-Step Options

Standard step types have a single approver and cannot use rules.

When you select the standard step type in step 5. c. above, you receive choices in the Assignee Type pull-down for the User, Custom User, Related User, Queue, and Custom Queue assignee types.

Type	Description	Associated Fields
User	Assigns the approval request step directly to a user. No logic is employed to discriminate in the assignment. The user identity is fixed and, barring delegation or reassignment, unchanging.	**Assignee** (required): Username of the assignee responsible for the approval request **Assignee Description** (optional): Description of the assignee (in this case, an individual, e.g. "Vice President, Sales")

Type	Description	Associated Fields
Custom User	A custom user is a user (or users) selected by reference to logic from a custom object. Custom objects, defined in the Conga Platform, are tables that in this instance link a set of logical tests to a named user or set of users. Each row contains one or more conditions (criteria) and an approver.	**Object** (required): Pull-down menu for selecting the object associated with the custom user. This set of options is defined in the Conga Platform using a custom object. **Record Criteria**: When you choose an object, a set of definitions, corresponding to table columns in the custom object, becomes available. Click the **Add Criteria** hypertext below the Record Criteria field to access the Record Criteria popup. This enables you to enter one or more criteria consisting of Field, Operator, and Value. These can be read as if-then statements. When you are done, the resultant expression is stored in the Record Criteria field. **Assignee** (required): When the criteria are satisfied, the assignment is sent to the user(s) designated in the custom user defined in the designated custom object field. **Assignee Description** (optional): Description of the assignee (in this case, an individual, e.g. "Vice President, Sales")

Type	Description	Associated Fields
Related User	A related user is a user found by reference to a user lookup reference field in the associated business object (e.g., Agreement or Opportunity). This enables you to assign a user associated with the business object (or record) as the approver. For example, you can assign an account's executive sponsor as an approver of that account's quotes. By specifying the executive sponsor via a user field on the account record associated with the quote, you can create a rule or flow where the assignee is held in the executive sponsor field on the account object.	**Assignee** (required): This field is populated with a related-user definition when you click Add Assignee as described in To add a related user to a flow. **Assignee Description** (optional): Description of the assignee (in this case, an individual, e.g. "Vice President, Sales")
Queue	A queue is a defined group of approvers, any of whom can take ownership of the requested approval and approve or reject it. No logic is employed to discriminate in the assignment. The user identity is fixed and, barring delegation or reassignment, unchanging.	**Assignee** (required): This pull-down menu enables you to select a predefined queue consisting of one or more reviewers, any of whom can review for the entire group individually. For example, if any member of the Contract Review Committee can approve a transaction, the "CRC" queue is set as the transaction's required reviewer. All committee members receive notification. The matter is resolved when any member of the committee authorizes or rejects the transaction. **Assignee Description** (optional): Description of the assignee (in this case, a queue, e.g. "Contract Review Committee")

Type	Description	Associated Fields
Custom Queue	A custom queue is a queue nominated by business logic from a custom object table.	**Object** (required): Pull-down menu for selecting the object associated with the custom queue. This set of options is defined in the Conga Platform using a custom object. **Record Criteria**: When you choose an object, a set of definitions, corresponding to table columns in the custom object, becomes available. Click the **Add Criteria** hypertext below the Record Criteria field to access the Record Criteria popup. This enables you to enter one or more criteria consisting of Field, Operator, and Value. These can be read as if-then statements. **Assignee** (required): This pull-down menu enables you to select a predefined queue consisting of one or more reviewers, any of whom can review for the entire group individually. For example, if any member of the Contract Review Committee can approve a transaction, the "CRC" queue is set as the transaction's required reviewer. All committee members receive notification. The matter is resolved when any member of the committee authorizes or rejects the transaction. **Assignee Description** (optional): Description of the assignee (in this case, a queue, e.g. "Contract Review Committee")

Selecting the standard step type in step 5. c. also raises these options:

- Step Auto Complete: Fill in values for the user when the authorization or review is presented to them.
- Send Email: Notify reviewer of an approval step with a call to action.
- Notify Only: Notify recipient of approval step with no call to action.
- Skip Unresolved Assignee: Allow the approval flow to continue when an assignee cannot be reached.

Child Process-Step Options

Before you can configure a child process, a preconfigured rule must be available for inclusion.

When you select the Child Process step type in step 5. c. above, these options appear:

Context Object. You must choose one of the following from the Context Object pull-down menu:

- Contract: The step pertains to a contract.
- Contract Clause: The step pertains to a contract clause.
- Clause Approval: The step requires a contract clause to be approved.

Approver Rule. You must assign one approver rule. Enter the name of the rule you will apply here. Rule name auto-completion begins when you enter three characters.

Sub-Process-Step Options

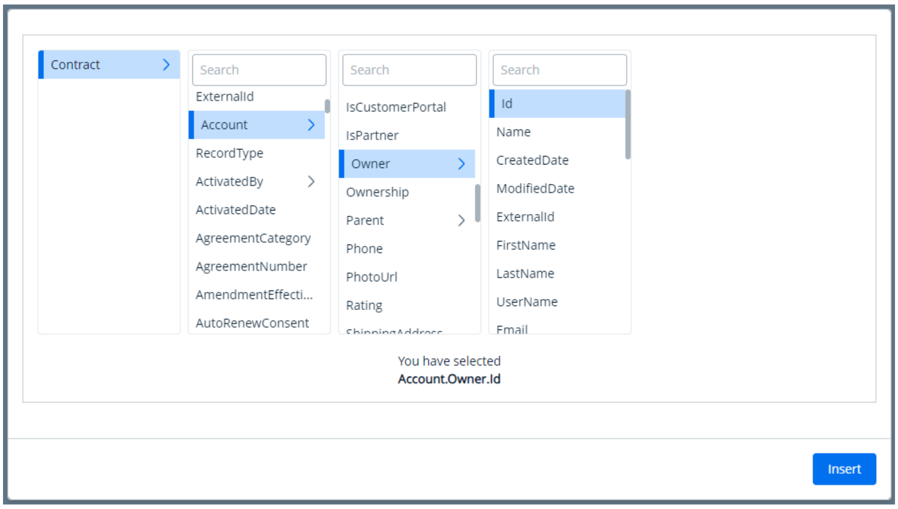
Sub-processes require a preconfigured rule to be available for inclusion before you can configure them.

Approver Rule. You must assign one approver rule. Enter the name of the rule you will apply here. Rule name auto-completion begins when you enter three characters.

To add a related user to a flow

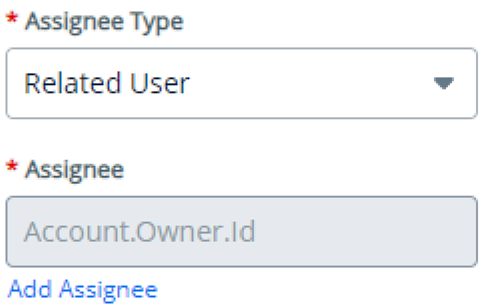
Adding related users enables you to configure flows to send items for approval to users or properties identified dynamically, rather than by preconfiguration.

1. Follow the steps in To create an approval flow to open the **Rule entries** tab.
2. Click the **Setup** tab to open the Approval Flows Setup window.
3. Click a step entry or one of the plus-sign icons to edit a step, add to an existing step, or add a new step.
4. Label, sequence, and describe the rule entry step as needed.
5. Select **Related User** in the Approver Type field. This raises the Add Approver hyperlink below the Approver field.
6. Click the **Add Approver** hypertext to raise an attribute selector. This selector reflects the business object type (Opportunity, Contract, Proposal, Product Configuration, Line Item, Contract Clause, Contract Line Item) chosen in the Approval Flows window for this approval flow.
7. Select the parameters that result in the related-user identity you want the flow to identify. For example, to select an account owner by ID to approve a contract type, select **Account**, **Owner**, and **Id**:



This selection is reflected in the bottom legend: "You have selected **Account.Owner.Id**".

8. Click **Insert**. The string entry is added as a related user.



This string is added to requests to the CLM backend to identify documents' account owners dynamically and to route them for approval without laborious fixed definitions.

9. Complete the flow entry definition as described in To create an approval flow.

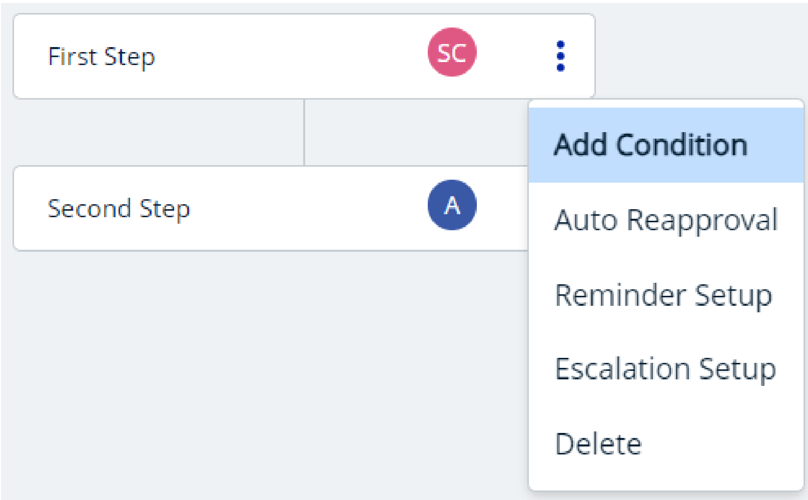
Configuring Custom Users and Queues

Custom users and custom queues are objects defined on the Conga Platform. They represent a user or group of users with tabular characteristics in the underlying platform logic. In the Approvals context, they provide the opportunity to present a highly granular definition of the required recipient. For example, one could configure an object that contains a detailed roster of representatives identified by ZIP code ranges, such that a regional representative can be solicited for an approval based on the sales region in which a service will be provided.

To configure a custom user or custom queue, follow the procedure in To create a new custom object.

To edit an approval flow

1. Find an approval flow from the Approval Flows window and click the More (kebab) icon
2. Select **Edit** from the pull-down menu, raising the Setup window.
3. You can edit, add, or delete individual steps in a flow. The steps appear on the screen in entry order until you set dependencies.
4. Add steps as described in step 5 of To create an approval flow.
5. When a step has been saved and is written to the Approval Flows Setup window, you can further customize it by clicking the More (kebab) menu and selecting from the pull-down menu:



- **Add Condition**: This applies conditional logic to a step. For example, require this step if permission if an opportunity exceeds a certain threshold; else skip to next step.
- **Auto Reapproval**: If the assigned reviewer has approved this step once at the present value, their reapproval is assumed and the approval continues. For example, if a sales rep has approved a 50% discount in the past, their approval of a 40% discount on reapproval can be assumed for the current reapproval cycle.
- **Reminder Setup**: This sets an email reminder at a given point in the approval cycle.
- **Escalation Setup**: Sets an escalation path and timing. For example, if a sales manager fails to approve a deal after 5 days, escalate to the VP of Sales.
- **Delete**: This deletes the step only.

Note

If all steps are deleted, the approval flow resets from Active to Draft status.

To delete an approval flow

1. Find an approval flow from the Approval Flows window and click the More (kebab) icon.
2. Select **Delete** from the pull-down menu.
3. Click **Delete** from the confirmation popup.

Configuring the Settings Window

Once you've created the Approval Rules through the Setup window, you can further configure them through the Approval Settings window. This window provides a set of configuration options organized into five tabs: Entry Criteria, Notifications, Comments, Other Settings, and Update Actions.

Entry Criteria

This tab enables you to define the conditions that trigger an approval process.

1. Add rule criteria in the Rule Criteria section. Select a field name from the Field Name pull-down, assign it a logical operator from the Operator pull-down, and provide an appropriate value to create a testable rule. For example, you can pull down the Total Contract Value field type, assign a "greater than or equal to" logical operator, and a numeric value to qualify a rule.
2. Click the plus icon (**+**) to create additional rule criteria. Multiple rules must be separated by Boolean operators (Approvals adds " AND " by default. You can also use the OR operator.) For example, "Contract value is greater than or equal to 1000000 dollars AND Location is Chicago." XOR, NAND, XNOR and NOR operations are not supported: use the rule criteria logic to support these logical operations (for example, for a NOR relation negating the previous example: "Contract value is less than 1000000 dollars AND Location is not Chicago").

Notifications

This tab enables you to configure email templates to notify users at each stage of the approval process. Different templates can be set for assignment, reassignment, escalation, cancellation, reminders, and errors. Each template type is customizable and can be activated as needed, ensuring users receive timely and relevant information.

Field	Description
Assignment Email Template	Type to search and select the template used to notify users that they must decide on an approval request.
Reassignment Email Template	Type to search and select the template to notify users that an approval request task initially assigned to them has been reassigned.
Escalation Email Template	Type to search and select the template used for auto-escalation notifications. Configuration is required to activate this feature.
Cancellation Email Template	Type to search and select the template to notify users that an approval request has been canceled.
Notify Only Email Template	Type to search and select the template used to notify users without requiring action.
Reminder Email Template	Type to search and select the template for automatic reminders of approvals awaiting action.
Error Email Template	Type to search and select the template to notify users about errors in the approval process.

Comments

This tab enables or disables comments at various stages of the approval process, such as submission, approval, rejection, and recall. You can define whether comments should be mandatory or optional for each action, providing clear expectations for users submitting, approving, or rejecting requests.

Field	Description
Submission Comments Enabled	Toggle on to allow the input of comments when submitting the approval request.
Submission Comments Mandatory	Toggle on to make submission comments mandatory when submitting a request.

Field	Description
Approval Comments Mandatory	Toggle on to make comments mandatory when approving a request.
Rejection Comments Mandatory	Toggle on to make comments mandatory when rejecting a request.
Recall Comments Enabled	Toggle on to allow the input of comments when recalling an approval process.
Recall Comments Mandatory	Toggle on to make recall comments mandatory when recalling an approval process.

Other Settings

This tab provides configuration options, such as consolidating approvals and notifications, enabling the continuation of approvals even after rejections, and specifying a backup admin user. These settings help streamline the approval process and ensure actions are completed even if certain steps are skipped or approvers are unavailable.

Field	Description
Consolidate Approvals	Toggle on to group related approvals into a single step.
Consolidate Notifications	Toggle on to combine related notifications into a single email.
Continue Pending Approvals on Reject	Toggle on to continue the approval process even if an approver rejects the request.
Backup Admin User	Type to search and specify a backup admin approver. If not specified here, the default backup admin in configuration settings is used.

Update Actions

This tab enables you to define actions that occur during initial submission, final approval, or final rejection. Select fields, assign values, and add descriptions for each action. You can add or delete actions as needed, allowing you to customize the approval process based on your specific requirements.

After all the configurations, you can click **Save** and click **Activate** the Approval Flows.

Approval Rules

Approval rules encapsulate logical, causal decision points to develop your approval flows. Rather than the one-step, one-reviewer rule for standard flow steps, approval rules enable you to adopt decision points requiring multi-party decisions, which you can define as Unanimous, Majority, Percent, and Quorum. Rules are also reusable: Once you have configured a rule, you can adopt it in other approval flows.

Rules apply a logical condition to a business object, then drive an action when that condition is satisfied. These correspond to rules (the base conditional criteria for applying the rule), and "rule entries" (the actions that occur when the rule is triggered).

Access approval rules by clicking the Approvals icon (⌘) and then clicking the **Approval Rules** tab in the left navigation panel.

Reapproval Logic

Use reapproval logic to streamline reapprovals. For example, a contract for more than $100,000 but less than $1 million may require the CEO for initial approval but may only require a director to reapprove. Likewise, a contract may require an attorney to approve on submission, but not for a renewal under its own terms. In such circumstances, the CEO or the attorney can be assumed to have approved without requiring their explicit reapproval. The Approvals administrative user can configure reapproval flows to eliminate such unnecessary reapprovals.

Reapproval behaves comparably to auto-approval but must meet special criteria, which can affect the whole entry rather than a specific assignee. For example:

- Entry 1
  - Assignee 1
  - Assignee 2
- Entry 2
  - Assignee 3
  - Assignee 4

If reapproval criteria are not met, all assignee approval flags are set to false, with each assignee and entry dependent on the approval before it.

On submittal, this presents a simple linear flow. Assignee 1 is tasked with the first approval, followed by Assignee 2, and so forth:

- Entry 1
  - Assignee 1 (assigned)
  - Assignee 2 (not submitted)
- Entry 2
  - Assignee 3 (not submitted)
  - Assignee 4 (not submitted)

If Entry 1 meets reapproval conditions, the submission looks like:

- Entry 1
  - Assignee 1 (approved)
  - Assignee 2 (approved)
- Entry 2
  - Assignee 3 (assigned)
  - Assignee 4 (not submitted)

To create a new rule

Rules apply a logical condition to a business object (test), then drive approval actions when that condition is satisfied. These correspond to two sections in the rule setup titled "WHEN to Apply" and "Rule Entries" or "Then the following users will approve" in the rule entry itself.

1. Click the **Create** button at top right to raise the New Approval Rule window.
2. Enter a name for the rule in the **Rule Name** field.
3. Select a business object type (Opportunity, Contract, Proposal, Product Configuration, Line Item, Contract Clause, or Contract Line Item) from the **Business Object** pull-down menu.
4. Select a rule type from the **Rule Type** pull-down menu. Options are Condition (a logical state) or Dimension (a business object or formula defining a business object).
5. Pick an approval policy from the Approval Policy drop-down. Available policies are:
   a. **Unanimous:** All reviewers must approve. One dissent is a veto.
   b. **Majority:** More than half of the reviewers must approve. It is best to establish an odd number of reviewers to prevent tie votes. For an even number of reviewers, tie votes result in rejection.
   c. **Percent:** A specific percentage of approvers is necessary to approve. If you select a percent that must approve, use the **Approval Percent** stepper to select the required approval percentage.

   d. **Quorum:** A specific number of approvers is necessary to approve. If you select a quorum that must approve, use the **Approval Count** stepper to select the required number of approvers.
   e. Click **Create**.
6. If you picked Dimension in step 4, you can select a match rule type from the Match Rule pull-down menu. Options are Match All (requires all conditions met) or Match Any (requires any condition met).
7. For dimension rule type, you can add up to six dimensions to define the desired rule criterion. You must also select whether the dimension type is discrete (i.e., an exact match) or a range (i.e., any value between two values). If the desired dimension is not available, you can create custom dimensions.
8. Enter a description of the rule (optional).
9. Add rule criteria in the Rule Criteria section. Select a field name from the Field Name pull-down, assign it a logical operator from the Operator pull-down, and provide an appropriate value to create a testable rule. For example, you can pull down the Total Contract Value field type, assign a "greater than or equal to" logical operator, and a numeric value to qualify a rule.
10. Click the plus icon (**+**) to create additional rule criteria. Multiple rules must be separated by Boolean operators (Approvals adds " AND " by default. You can also use the OR operator.) For example, "Contract value is greater than or equal to 1000000 dollars AND Location is Chicago." XOR, NAND, XNOR and NOR operations are not supported: use the rule criteria logic to support these logical operations (for example, for a NOR relation negating the previous example: "Contract value is less than 1000000 dollars AND Location is not Chicago").
11. Click **Save**. You are returned to the Approval Rules screen. You must create rule entries before you can activate the new rule.

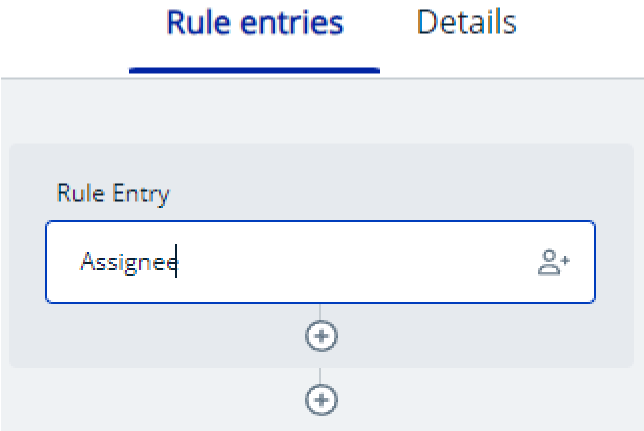
To edit an existing rule

1. Find the rule name in the Approval Rules table.
2. Click the rule name or select the adjacent More icon (⋮) and then select **Edit** from the resulting pull-down menu.
3. Click the **Details** tab if necessary and modify the approval rule values as described in To create a new rule.

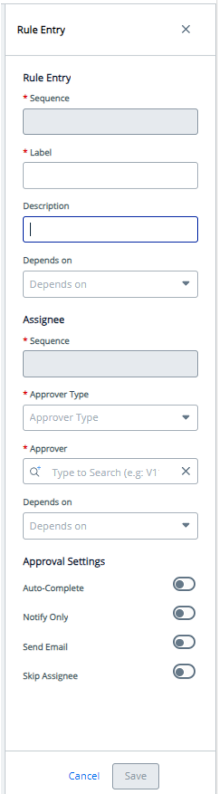
To create or edit rule entries

For each rule, you must add rule entries defining the conditions under which the rule shall be enforced.

1. From the Approval Rules window, click the rule name link in the Rule Name column to access the rule details.
2. Open the **Rule entries** tab. This raises an active diagram interface showing the order of steps.



   For each rule entry, you can edit the entry itself (by clicking in the main box), add a sub-step (i.e., an added test) within the rule entry by clicking the upper plus-sign icon, or add a new rule entry by clicking the lower plus-sign icon. Each choice provides the same Rule Entry panel options.
3. Clicking in the Rule Entry box opens the Rule Entry panel at right:



4. Label and describe the rule entry in the fields provided. For a first rule entry, sequence and dependency information will not be available, but as you add entries, you will have to choose the order in which rules are run (Sequence) and, if necessary, the rules that must have been run to implement the current rule (Dependencies).
5. Select an assignee for the rule. As with the entry itself, the "Sequence" and "Depends on" fields are blank for the first rule entry. Select an approver type (User, Custom User, Related User, Queue, or Custom Queue that must approve), and the appropriate approver or object (this could be a particular user, a custom or related user, or a queue. See Standard-Step Options for details on these approver types.) The available options for this sequence field are constrained to actions within the same step.

   Note

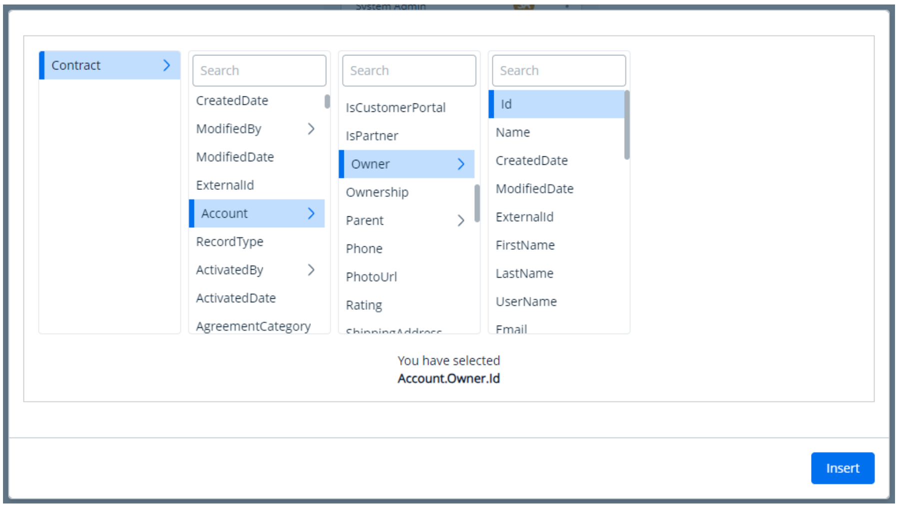
   You can reorder long assignee lists by dragging and dropping the entries. You can also assign an ordinal number to an assignee to designate the sequence of dependency. This number updates automatically if you reorder the assignees.

6. Set Approval Settings toggles (**Auto-Complete**, **Notify Only**, **Send Email**, **Skip Assignee**) as required.
7. Select one of **Add Condition**, **Auto Reapproval**, **Reminder Setup**, **Escalation Setup**, or **Delete**.
   a. **Add Condition**: Use this to add conditional logic to apply the rule. You can define the logical relationship of a field to a value. Use additional logical operators to define these conditions in relationship to each other.
   b. **Auto Reapproval**: Use this to add conditional logic to reapprove the step that uses this rule. Use additional logical operators to define these reapproval conditions in relationship to each other.
   c. **Reminder Setup**: Use this to define the frequency with which reminders are issued. Select **Days** or **Hours** from Duration and a number from Frequency.
   d. **Escalation Setup**: Use this to establish the rule for escalation. Select the number of days or hours the rule requires for completion, the assignee type, and the assignee if possible, and then toggle **Auto Escalation** on.
   e. **Delete**: Click this to delete the rule entry. You will be prompted to confirm the deletion.
8. When you have modified the rule conditions as desired, click **Save** to preserve your changes.

To add a related user to a rule entry

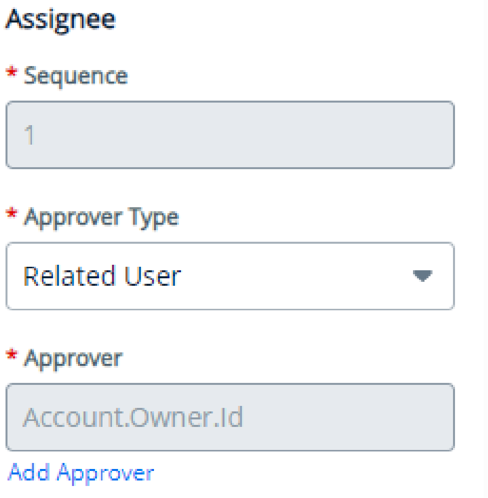
Adding related users enables you to configure flows to send items for approval to users with dynamically identified characteristics, rather than to specific preconfigured users.

1. Follow the steps in To create or edit rule entries to open the **Rule entries** tab.
2. Click a rule entry or one of the plus-sign icons to edit a step, add to an existing step, or add a new step.
3. Label, sequence, and describe the rule entry step as needed.
4. Select **Related User** in the Approver Type field. This raises the Add Approver hyperlink below the Approver field.
5. Click the **Add Approver** hypertext to raise an attribute selector. This selector reflects the business object type (Opportunity, Contract, Proposal, Product Configuration, Line Item, Contract Clause, Contract Line Item) chosen in the Approval Rules window for this approval rule.
6. Select the parameters that result in the related-user identity you want the rule to identify. For example, to select an account owner by ID to approve a contract type, select **Account**, **Owner**, and **Id**:

   This selection is reflected in the bottom legend: "You have selected **Account.Owner.Id**".

7. Click **Insert**. The string entry is added as a related user.



   This string is added to requests to the CLM backend to identify documents' account owners dynamically and to route them for approval without laborious fixed definitions.
8. Complete the rule entry definition as described in To create or edit rule entries.

To delete a rule

1. Find the rule in the Approval Rules table.
2. Select the adjacent pull-down menu and pick **Delete**.
3. A confirmation popup appears. Click **Delete** to confirm.

Approval Search Filters

The Approval Search Filter is a feature that enables you to create reusable filters that apply specific criteria for approval workflows in the Conga Platform. You can use this feature to automate and streamline approval processes by defining which business objects and conditions should trigger an approval.

These filters consist of two key components: Child Filters and Entry Criteria:

1. Child Filter: A Child Filter is used to define specific criteria for filtering business objects. This enables you to create a filter based on predefined business objects (such as Agreement Line Item, Cart, or Cart Line Item) and apply it across multiple approval rules.
2. Entry Criteria: Entry Criteria refers to the conditions that need to be met for a filter to trigger. These criteria can be configured with multiple expressions, such as "greater than," "less than," or "equals," and combined with logical operators like AND, OR, and parentheses.

Access approval search filters by clicking the Approvals icon (⌘) and then clicking the **Approval Search Filters** tab in the left navigation panel.

To create a new search filter criteria

1. Click the **Create** button at top right to raise the Create Filter window.
2. Select a business object type (Opportunity, Agreement, Proposal, Production Configuration, Line Item, Agreement Clause, or Agreement Line Item) from the **Business Object** pull-down menu.
3. Select a filter type from the **Filter Type** pull-down menu. Options are Entry Criteria or Child Filter.
4. Enter a name for the criteria in the **Filter Name** field.
5. Enter a sequence number to the filter. It should have a unique value from existing feature sets.
6. Enter a description of the rule (optional).
7. Add rule criteria in the Rule Criteria section. Select a field name from the Field Name pull-down, assign it a logical operator from the Operator pull-down, and provide an appropriate value to create a testable rule. For example, you can pull down the Total Contract Value field type, assign a "greater than or equal to" logical operator, and a numeric value to qualify a rule.
8. Click the plus icon (**+**) to create additional rule criteria. Multiple rules must be separated by Boolean operators (Approvals adds " AND " by default. You can also use the OR operator.) For example, "Contract value is greater than or equal to 1000000 dollars AND Location is Chicago." XOR, NAND, XNOR and NOR operations are not supported: use the rule criteria logic to support these logical operations (for example, for a NOR relation negating the previous example: "Contract value is less than 1000000 dollars AND Location is not Chicago").
9. Click **Create**. You are returned to the Approval Search Filter screen. You can make the filter criteria active by the toggle button in **Active** field.

To edit an existing search filter

1. Find the filter name in the Approval Search Filters table.
2. Click the filter name or select the adjacent More icon (⋮) and then select **Edit** from the resulting pull-down menu.
3. Modify the approval rule values as described in To create a new search filter criteria.

To delete a search filter

1. Find the filter in the Approval Search Filters table.
2. Select the adjacent pull-down menu and pick **Delete**.
3. A confirmation popup appears. Click **Yes, Delete** to confirm.

Approvals for Users

This section describes how Conga Approvals works, how to trigger an approval request for any object, how to respond to an email notification requesting approval, and how to approve or reject an approval request from the My Approvals page.

About this Guide

This document provides users with information on approval processes. It also covers the most common use cases for users. Its primary audience is assumed to be end users and customer sales representatives. For requirements and recommendations, see the System Requirements and Supported Platforms Matrix. For a list of updates to this guide for each release, see the What's New in Approvals Documentation topic.

See our Approvals REST API reference for REST APIs provided to work with Approvals objects.

This section describes:

- Approvals functional end user workflow
- Setting up approval process
- Approval center

Before using Approvals, you must be familiar with Conga terms and definitions.

Select one of the following topics for more information:

- Preview and Submit
- My Approvals

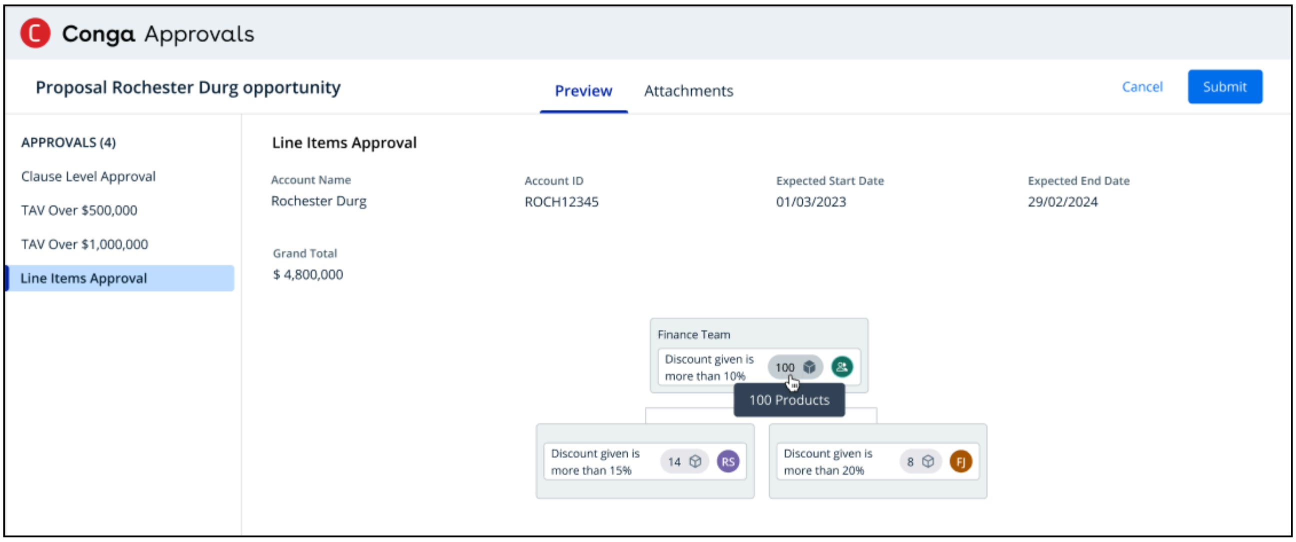
Preview and Submit

Though Conga Approvals' primary function is to provide clear approval flows for initiated processes, users can also modify and shape the flow in advance by previewing the approval process before submitting the triggering request for approval. With Approvals, Conga Platform users can preview records to be approved and see who the record's specified approvers will be. With this understanding, they can adjust their record to submit it to desired approvers. For example, a salesperson might adjust a product's discount by reviewing the required approvers at a given discount level: if a 50% discount requires approval from the CFO, but a 49% discount rises only to the VP of Sales, the salesperson can adjust the sales discount to meet the review level most likely to succeed. From the institutional perspective, this ensures approval rules and flows can be both firm and transparent.

Because the Approvals tool is modularized for the Conga Platform, approvals can be previewed and submitted for several business use cases, among them sales, pricing, and contract lifecycle management. How you access this flow depends on the tool Approvals is integrated with.

With Approvals, a user can:

- Preview approvals before submitting the approval request.
- See how many approval requests will be created when submitting a record for approval.
- See each approval request's assignees, given current record values.
- Preview required approvals and edit the record to change the number of approval requests created.
- Add attachments to the record submitted for approval.



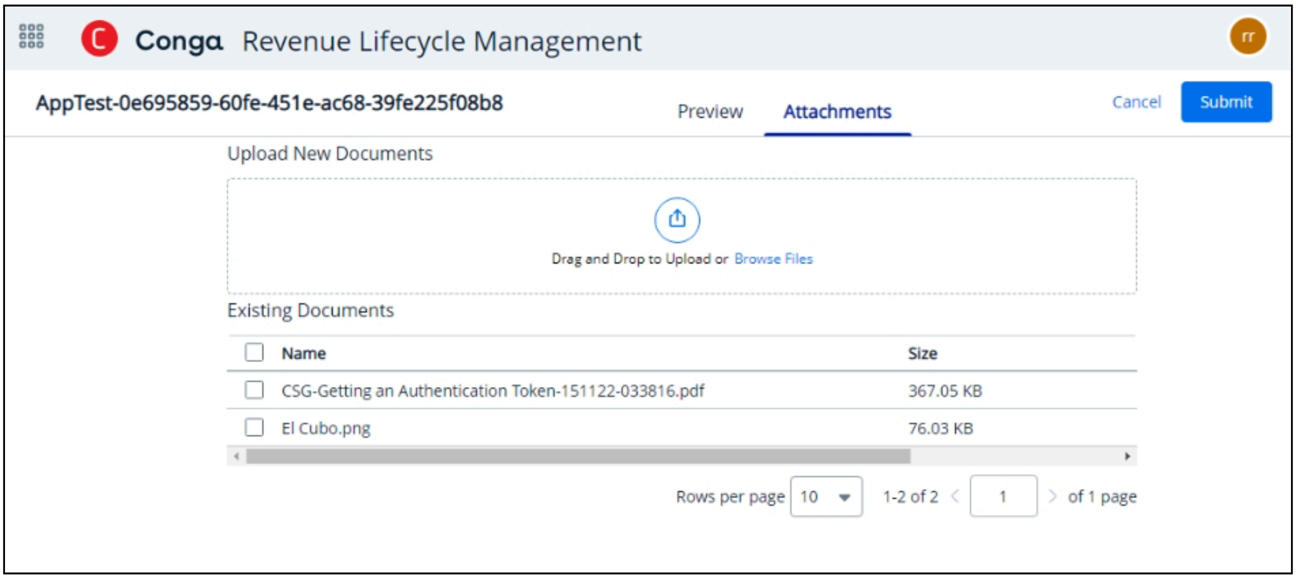
Accessing the Preview and Submit Feature

When criteria are satisfied in a request under development, the user is prompted in the host application (Conga CPQ, for example) to preview the request before submitting it. The preview is tailored to the particulars of the request's approval criteria, set by the administrator. These criteria may include such parameters as discount, total value, quality of service, duration, or others. As configured by the administrator, these approvals can be satisfied by one or more approvers in one or more approval steps.

In the Preview screen, major approval flow steps are shown in the left column. For each step, the specifics of the customer and deal, as well as that step's required approval flow are presented. Approvers are presented as stacked tiles.

Uploading Attachments

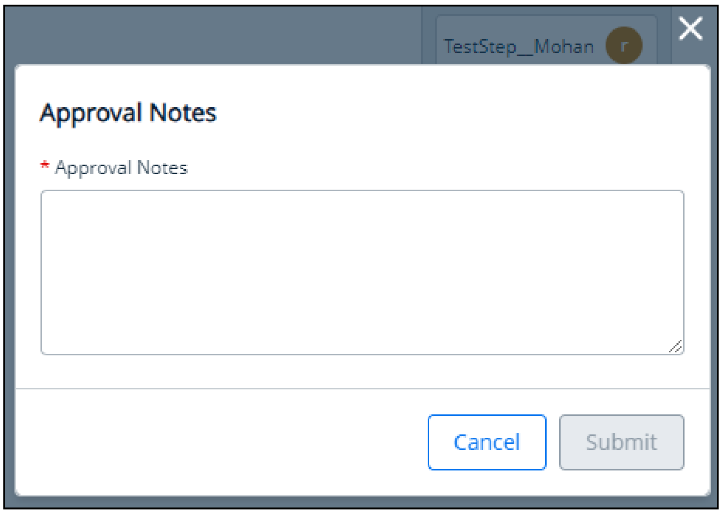
Clicking the Attachments tab opens an interface that enables you to upload attachments to the approvals flow. This optional step is useful for providing additional relevant information for approvers. You can drag and drop files or upload them from your file system by clicking the **Browse Files** link. When you select or drop the correct file, it is uploaded.



Submitting an Approval Request

1. When the approval request is satisfactory, you can submit it to the approvers named in the previewed flow by clicking **Submit**.

2. You are prompted to enter approval notes.



3. You will receive a processing delay advisory.
4. Once the request is processed, it is sent to approvers as described in the preview.

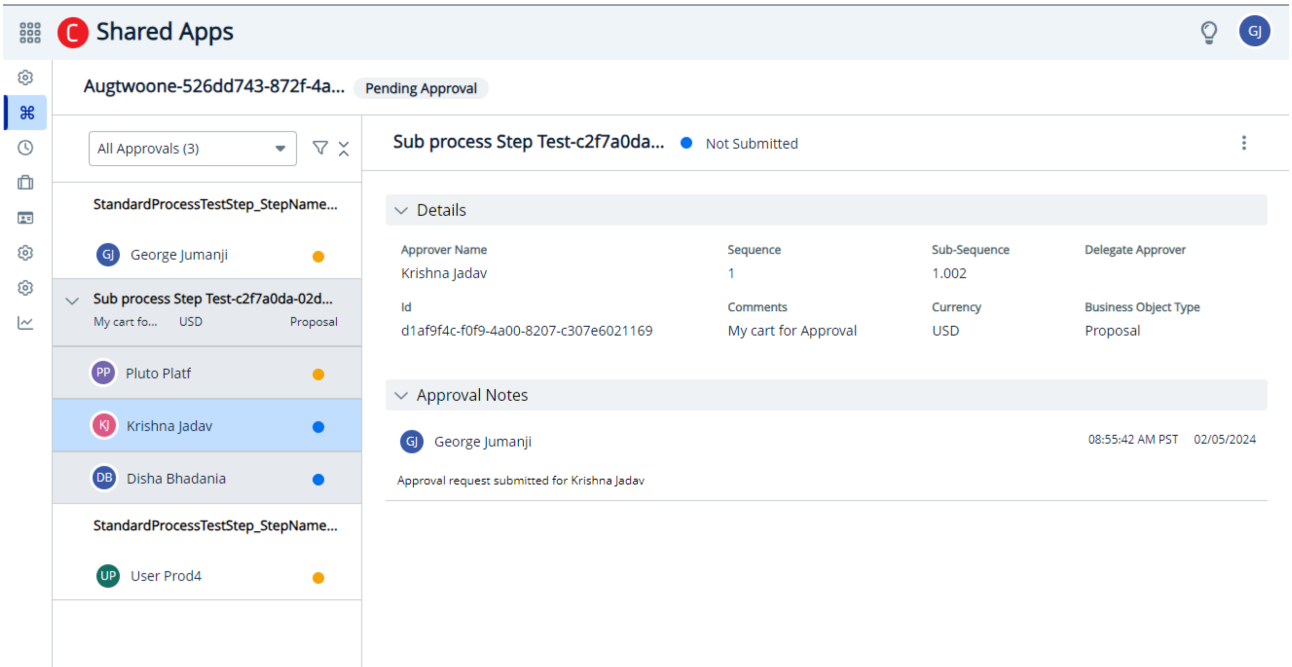
Note:

Once you submit an approval request, you cannot resubmit it.
If a request has been recalled or canceled, the submission process is complete, and you cannot submit or resubmit it.

My Approvals

You can access Approvals directly from your Revenue Lifecycle Cloud instance, or you may respond to approval requests sent to you as email notifications.

Entering from the Revenue Lifecycle Cloud takes you to the My Approvals page.



From this page, you can

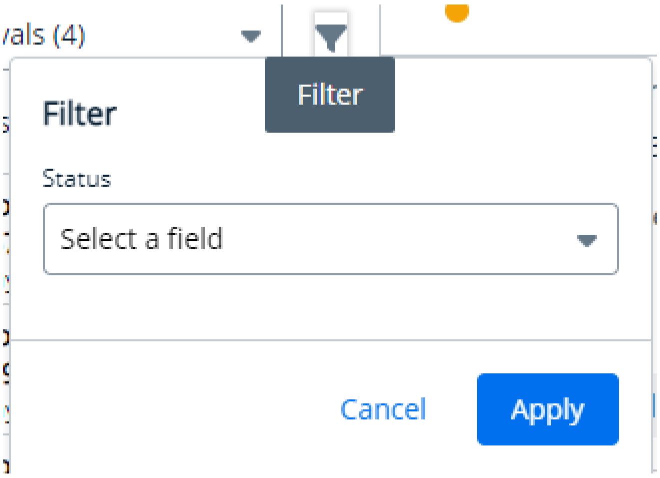
- View and filter approval requests
- Reject an approval request
- Approve a request
- Reassign an approval request
- Recall an approval request

To filter approval requests

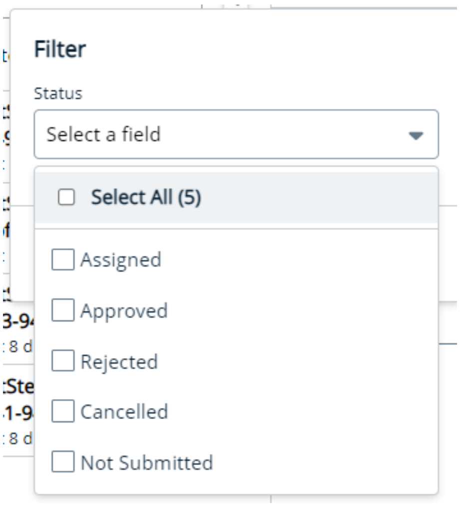
To the left of the My Approvals window is an approval selection column, with a search/ filter widget above. You can click in the frame to select All Approvals or narrow your view to just the approvals that are "Assigned to me." Each entry is followed by a number indicating the total count of approvals in that category.

You can achieve greater selectivity and granularity by:

1. Clicking the filter icon ( ):



2. Then clicking **Select a field** in the filter panel.



3. This raises possibility of selecting all or some subset of approvals based on their status in the process.

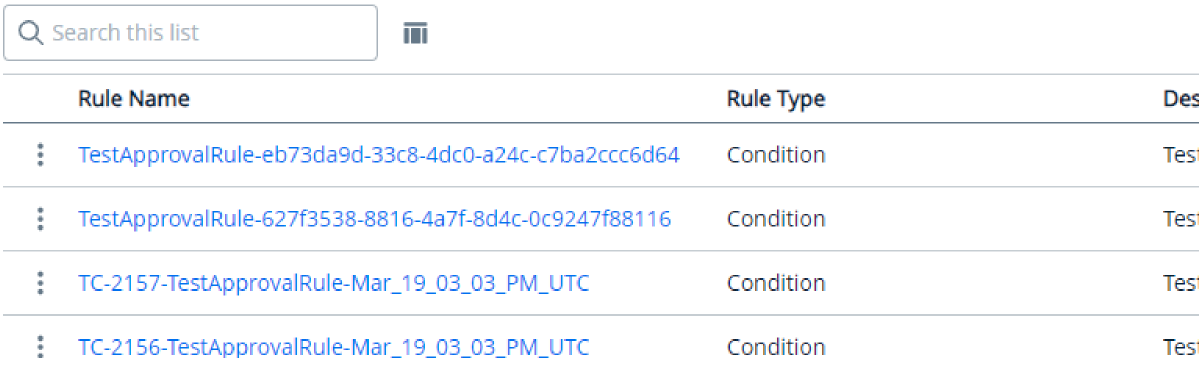
> **Note**
>
> The search results you filter are constrained not only by the filtration terms but also by the initial selection of "All Approvals" or "Assigned to me."

Searching and Sorting List Entries

For both approval flows and rules, you can search lists and sort your results.

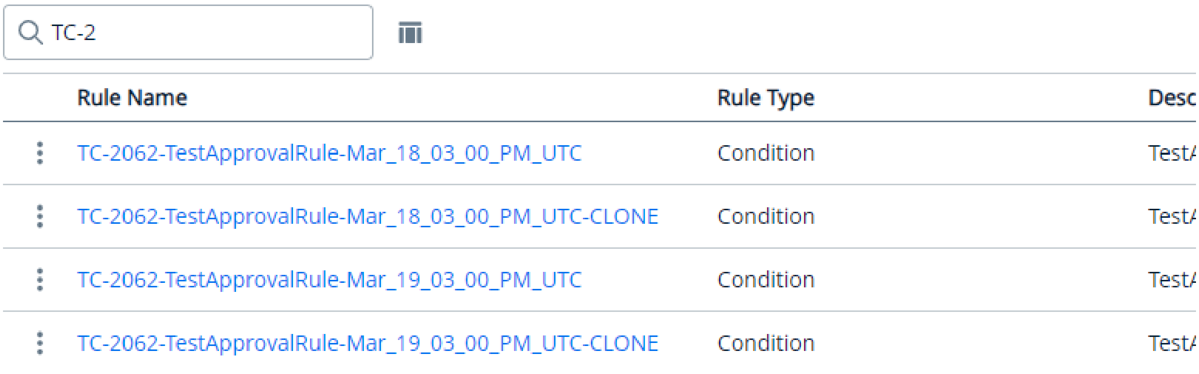
To search lists

1. Access the search bar above the list:



	Rule Name	Rule Type	Des
⋮	TestApprovalRule-eb73da9d-33c8-4dc0-a24c-c7ba2ccc6d64	Condition	Tes
⋮	TestApprovalRule-627f3538-8816-4a7f-8d4c-0c9247f88116	Condition	Tes
⋮	TC-2157-TestApprovalRule-Mar_19_03_03_PM_UTC	Condition	Tes
⋮	TC-2156-TestApprovalRule-Mar_19_03_03_PM_UTC	Condition	Tes

2. Enter a search term and press **Enter**:



	Rule Name	Rule Type	Desc
⋮	TC-2062-TestApprovalRule-Mar_18_03_00_PM_UTC	Condition	TestA
⋮	TC-2062-TestApprovalRule-Mar_18_03_00_PM_UTC-CLONE	Condition	TestA
⋮	TC-2062-TestApprovalRule-Mar_19_03_00_PM_UTC	Condition	TestA
⋮	TC-2062-TestApprovalRule-Mar_19_03_00_PM_UTC-CLONE	Condition	TestA

To sort search results and lists

You can sort both full lists and search results by column in ascending or descending order.

1. Adjacent to each column heading is a list order selector (). Hover over the list selector to see in which direction (ascending or descending) a sort will present results:

2. Select a column and click its list order selector to sort all results (complete list or search results) by the selected column values.

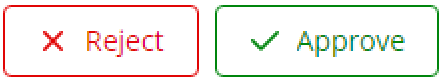
Approving or Rejecting an Approval Request

Based on the approval process configuration, if an approval request is initiated and you are the assigned approver for the request, you receive an approval notification email. You can choose to approve the request from the My Approvals page or respond to the notification itself.

Approving or Rejecting a Request from the My Approvals Page

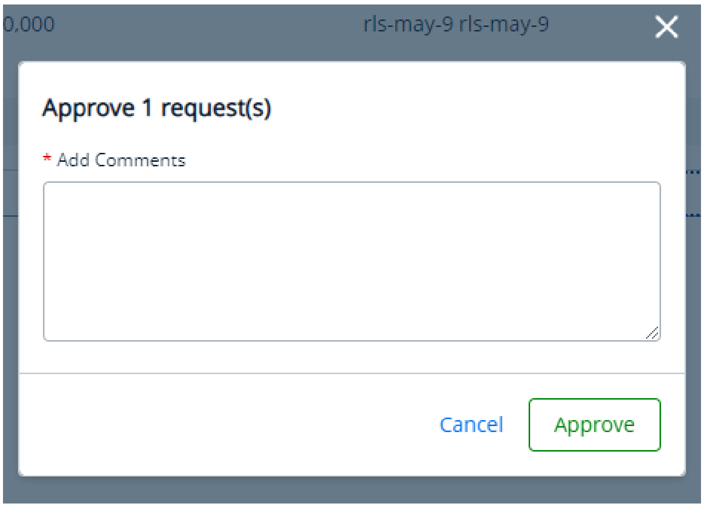
These instructions assume you have reached Approvals from a Conga Cloud product as described in that product's documentation.

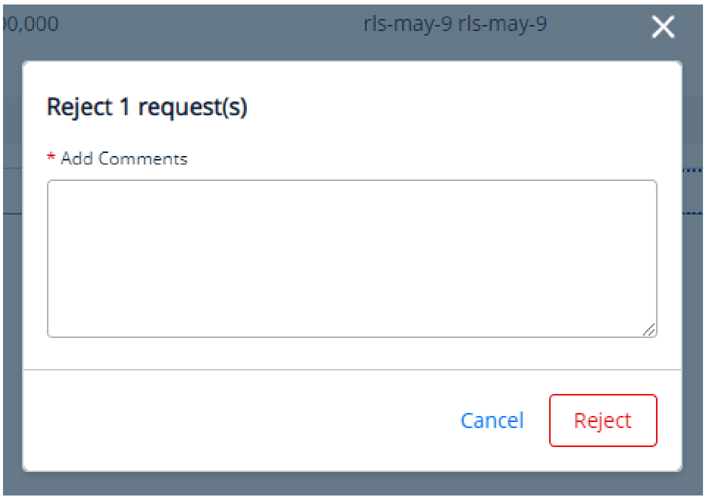
From the My Approvals page, you can approve or reject a request in two locations. You can manage the open request by clicking **Reject** or **Approve** above the request to the right:



You can also approve or reject approval requests in the navigation column to the left of the My Approvals page. Each entry offers a red X (✖) to reject, and a green check (✔) to approve.

For either an approval or a rejection, you are prompted to add comments before confirming your choice by clicking **Approve** or **Reject** again. This decision is irrevocable.





If you're not sure, you can escape this decision point by clicking **Cancel** or clicking the go-away X above the pop-up.

Approving or Rejecting a Request from Email

If an approval request is initiated, the assignee receives an email regarding the approvals assigned to them. The assignee can approve or reject an emailed request by:

1. Using the keywords "approve" or "reject" in the first line of the body.
2. Adding a comment to the second line.
3. Ending the comments with a blank line.

> When approving a request via email, add two spaces between the email signature and the comments as well as two spaces between the email signature and the approve or reject action.

Recommendations for Receiving Emails

If you are using classic Outlook and have the option to upgrade to New Outlook, Conga recommends you do so.

In your email client, enable **Include original message text** for "Replies and forwards" as shown in this link: Change how the original message appears in replies and forwards - Microsoft Support

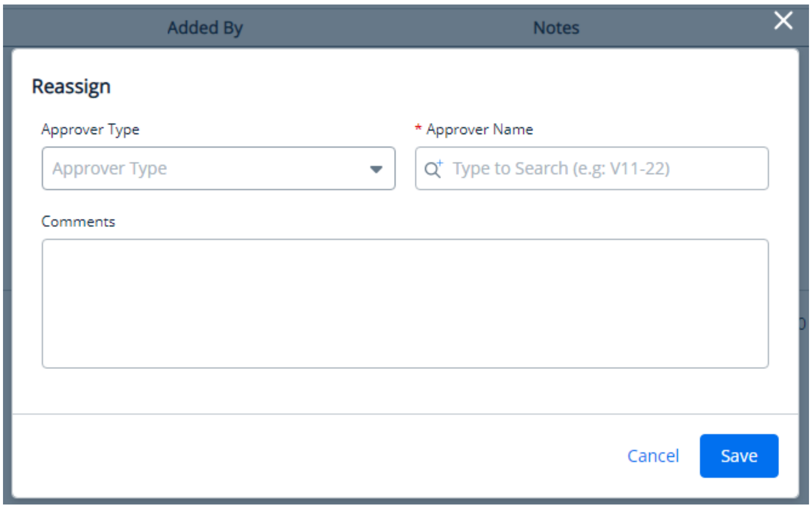
Every Approval email has critical identifier information. Do not alter it in your replies.

Approval Request Reassignment

You can reassign an approval step assigned to you to another user or to a user group.

You can reassign an approval to another approver from the My Approvals dashboard. The object subject to approval must be in a pending-approval status and the selected approval step must be in the assigned or reassigned state.

To reassign an approval request:

1. Access the My Approvals dashboard.
2. Select the approval request you will reassign.
3. Click the **Reassign** hyperlink above the Approval Notes table.
4. Enter the approver type, approver name, and any additional comments concerning the reassignment you want to make.


5. Click **Save**.

The reassigned approver is notified and can approve, reject, or reassign a request from the integrated Conga product or the email notification.

Adding an Approver

From time to time, it may be necessary to add approvers to an approval flow, for example, for a process that requires additional technical or legal review. Administrators can plot and modify flows prior to or during their execution. Adding an approver is an ad hoc action after an approval flow has started. Users can only add an approver to an approval flow that has been assigned (status is Submitted, Assigned, Reassigned, or On Hold), is available for review (not Notified or Not Submitted), and is not concluded (Approved, Rejected, Cancelled). Practically, if the Approve and Reject options are visible above the rule entry grid, you can add approvers.

To add an approver

Access the My Approvals screen as described in Approving or Rejecting an Approval Request.

1. Pick an approval step from the left nav column.
2. Click the More (⋮) button.
3. Select **Add Approver** from the drop-down menu to raise the Add Approver dialog.
4. In the Add Approver dialog:
    a. Select **User** from the Approver Type drop-down menu. You can also select **Queue** if any are available. (Queues may be available in Platform Approvals instances migrated from Salesforce. For queues, all actions below are the same, substituting "queue" for "approver").
    b. Enter the name of the approver you want in the Approver Name field. This field auto-completes from your entry to narrow the results. Select the approver name.
    c. Select **In Parallel** or **After** in the Approver Sequence window. The After option puts the new approver immediately after the approval step selected in step 1, while In Parallel creates a logical AND between two approvers in the same step: both must approve before the approval flow advances beyond the In Parallel step.
    d. Enter a meaningful description of the step and any additional information in the Step Name and Comments fields.
    e. Click **Save**.
5. The screen refreshes and the new approver shows in the Notes column of the Approval Notes grid as an ad hoc approver.

Recalling an Approval

Recalling an approval is occasionally required, for example, for an opportunity lost before the approval process is complete, or an approval submitted prematurely or in error.

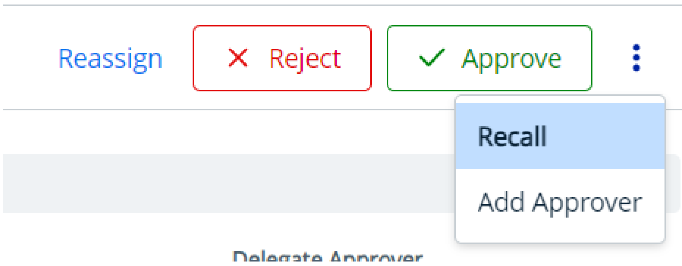
The recall feature is available to the submitter who initiated the approval flow and to administrators.

To recall an approval

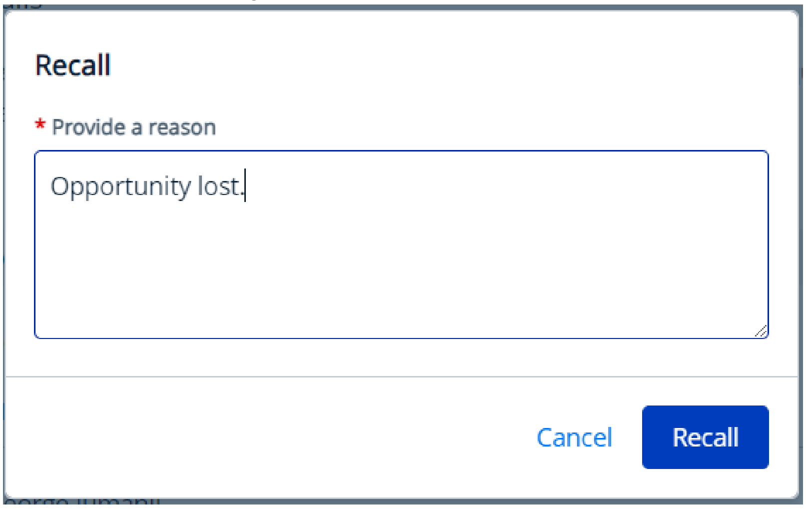
Access the My Approvals screen as described in Approving or Rejecting an Approval Request.

1. Pick an approval step from the left nav column.

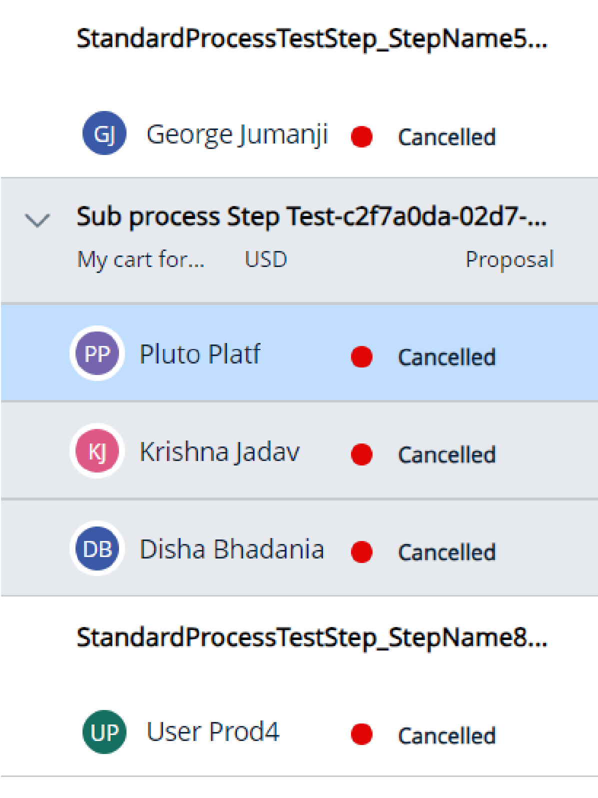
2. Click the More (⋮) button.
3. Select **Recall** from the drop-down menu to raise the Recall dialog.



4. In the Recall dialog, enter the reason for the recall in the **Provide a reason** text field.



5. Clicking **Recall** terminates the workflow. All steps are canceled. The approval is canceled, the quote’s approval status becomes "Cancelled", and the approval stage field's status becomes "Approval Required."



Approvals Bounce-Back Email Scenarios

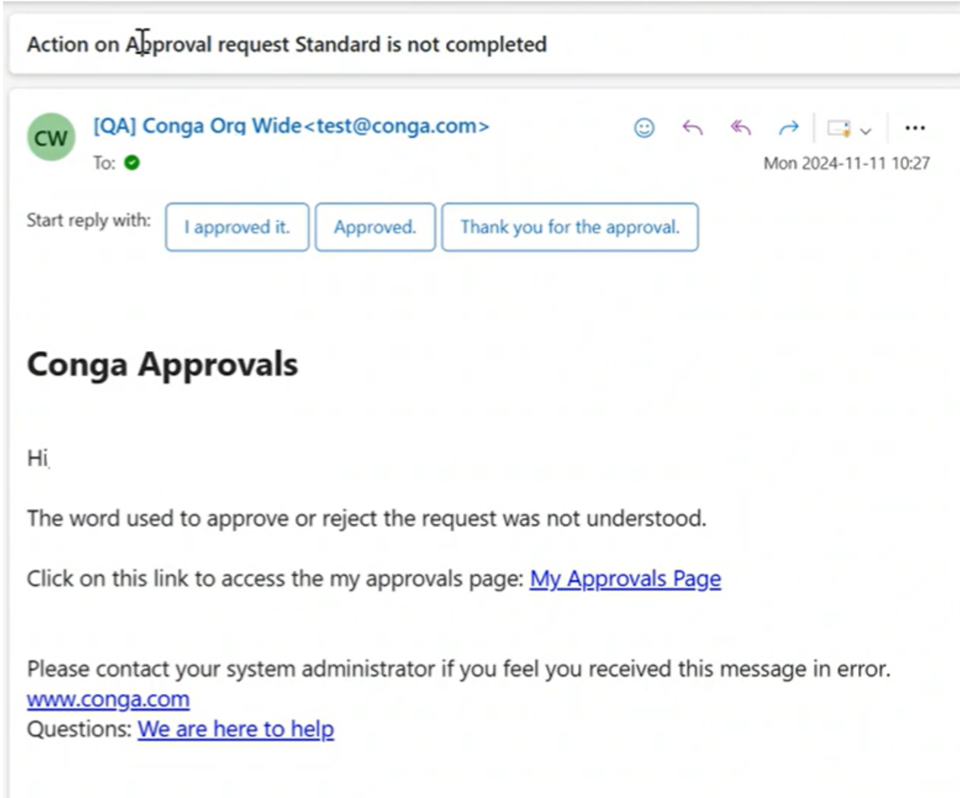
This section details scenarios where bounce-back emails are sent to inform users of unsuccessful actions during the approval process. Admins can customize these email templates to suit various messaging needs. Refer Configuring the Settings Window for admin configurations.

1. Bounce-Back Email for Invalid Keywords

Scenario: Users reply to an approval or rejection email with incorrect keywords.

- **Steps**:
  a. Set up an approval process with default email templates.
  b. Disable the settings for **Approve Comments Mandatory**, **Reject Comments Mandatory**, and **Recall Comments Mandatory**.
  c. Activate the process and submit a request for approval.
  d. The user replies to the approval request email with an incorrect keyword.

- **Expected Outcome**: A bounce-back email is triggered, notifying the user that they used an invalid keyword.

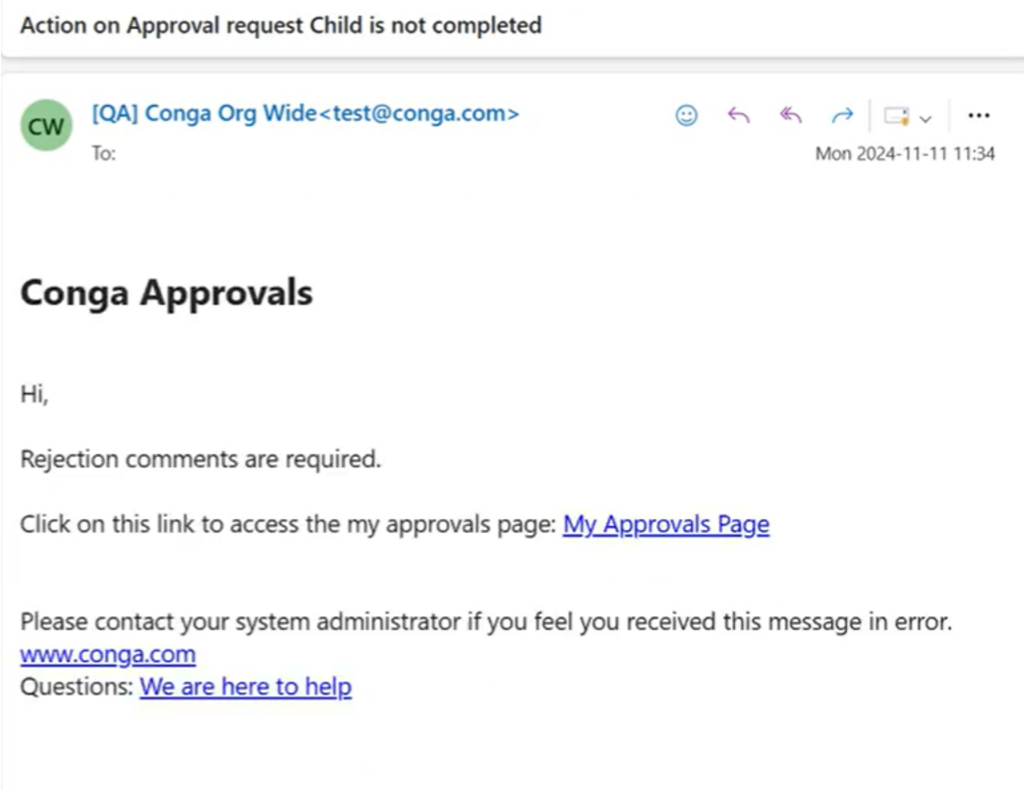


2. Bounce-Back Email for Missing Comments (Mandatory Fields Enabled)

Scenario: Users attempt to approve or reject without adding required comments, with **Approve Comments Mandatory** and **Reject Comments Mandatory** enabled.

- **Steps**:
  a. Configure the approval process with default email templates and enable **Approve Comments Mandatory** and **Reject Comments Mandatory**.
  b. Activate the process and submit a request for approval.
  c. Respond to the approval email using valid keywords without adding comments.

- **Expected Outcome**: A bounce-back email is triggered, requesting the user to provide the required comments.



Action on Approval request Child is not completed

CW [QA] Conga Org Wide<test@conga.com>
To:
Mon 2024-11-11 11:34

Conga Approvals

Hi,

Rejection comments are required.

Click on this link to access the my approvals page: My Approvals Page

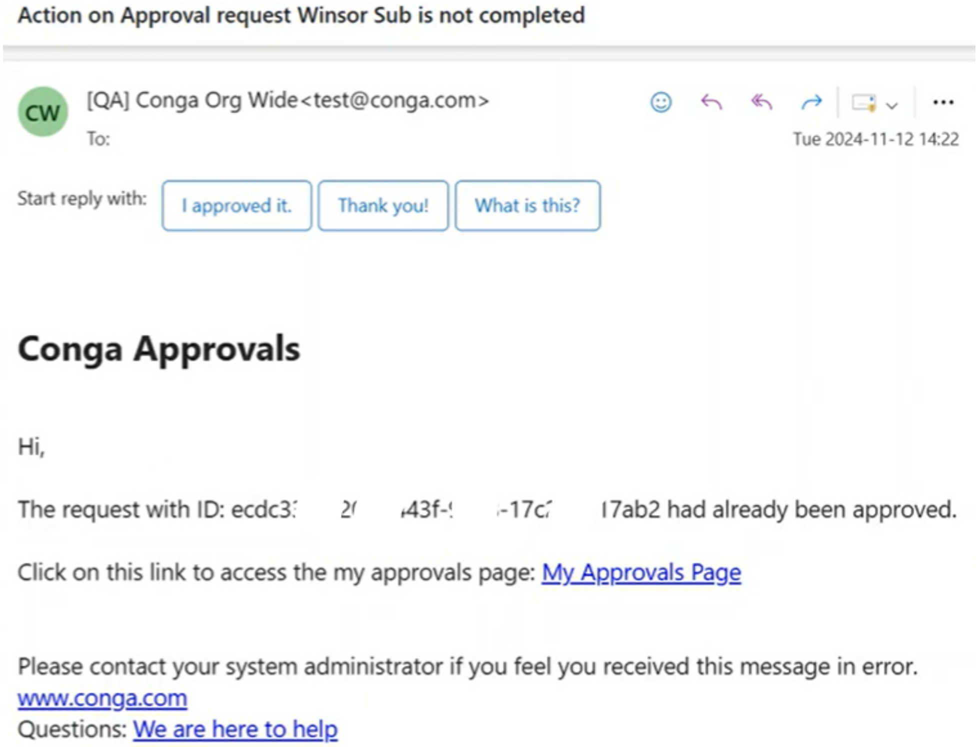
Please contact your system administrator if you feel you received this message in error.
www.conga.com
Questions: We are here to help

3. Bounce-Back Email for Already Approved or Rejected Requests

Scenario: Users attempt to approve or reject a request that has already been processed.

- **Steps**:
  a. Set up and activate the approval process with default email templates, with **Approve Comments Mandatory** and **Reject Comments Mandatory** enabled.
  b. Approve or reject the request through the user interface.
  c. Attempt to approve or reject the same request again via email.

- **Expected Outcome**: A bounce-back email is sent, notifying the user that the request has already been processed.


Action on Approval request Winsor Sub is not completed

CW [QA] Conga Org Wide<test@conga.com>
To:
Tue 2024-11-12 14:22

Start reply with: I approved it. Thank you! What is this?

Conga Approvals

Hi,

The request with ID: ecdc3: 2(,43f-! -17c7 I7ab2 had already been approved.

Click on this link to access the my approvals page: My Approvals Page

Please contact your system administrator if you feel you received this message in error.
www.conga.com
Questions: We are here to help

Approvals Features by Release

This document contains an overview of features introduced in each major release of Approvals for Conga Platform. For more information, see Approvals for the Conga Platform Features by Release.

Conga Customer Community & Learning Center Resources

Transform your business and drive success with your one-stop shop, resource-rich Conga Customer Community.

After registering as a new member, you can explore a variety of resources, including exclusive access to our product user groups, where you can ask questions, collaborate with peers, and learn best practices.

From a personalized onboarding checklist to free expert-led webinars and our thought-leadership blog, the community is not only a gateway to your success, but a way to manage your Conga account, access the install center, and submit support tickets.

Don’t forget to check out the Conga Learning Center to review your limited catalog of getting started courses. Want more? Consider upgrading to the Conga Learning Pass to unlock our premium training subscription.

Ready to get started?

Log into the Conga Customer Community with your credentials. Not yet registered? No problem. Set up an account to receive your credentials via our registration page.

After you log in, explore everything the community has to offer by clicking the “Get started” tab in the top navigation menu.

If you’re ready to jump right into training, there are two ways to access the Conga Learning Center:

- On the home page, click the “Learning center” tile
- In the top navigation, click the “Learn” tab and then click “Learning center” on the dropdown menu

