



Approvals User Guide

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Stratus Carta



Agenda

Agenda

1. Introduction
2. Personas and Permissions
3. Approvals App
4. Approval Settings
5. Data Model
6. Capabilities

Introduction

Khaled Halabieh

Principal Technical Architect



10 years in Salesforce ecosystem
8 years in Salesforce Revenue Cloud
Ex-Salesforce
30+ CPQ & Agentforce Revenue
Management Implementations
Dubai, United Arab Emirates

GS1



Slide 3

GS1 [@Khaled Halabieh] can you update with your details?
Georgii Saveliev, 2026-02-17T13:06:12.396

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Salesforce Industries & Revenue Cloud Expert Services



Expert Services

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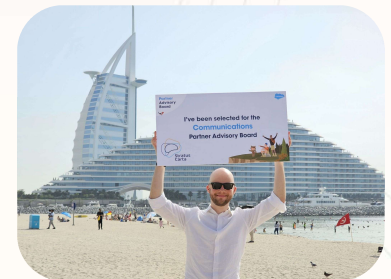
Georgii Saveliev speaking at Dreamforce 2023



Anuj Vaishampayan featured at Dreamforce 2024



Reconnecting with David Schmaier at TrailblazerDX 24



Stratus Carta selected for Comms Partner Advisory Board



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Approvals

What is Advanced Approvals?

Advanced Approvals on core enable flexible, scalable approval processes that support conditional logic, parallel approvals, and dynamic routing

Why Approvals Matter?

- Ensure compliance with pricing, discounts, and policy controls
- Reduce risk and support audit requirements
- Improve deal velocity through efficient routing
- Scale approval complexity as the business evolves

Personas and Permissions

To cover all personas involved in approvals, it's necessary to create 4 permission sets

- **Approval Admin**

- App Permissions: Run Flows
- Object Permissions: Approval Submission READ
- System Permissions: Approval Admin

- **Approval Designer**

- App Permissions: Manage Flows
- System Permissions: Approval Designer

- **Approval Reviewer**

- App Permissions: Run Flows
- Object Permissions: Approval Submission READ

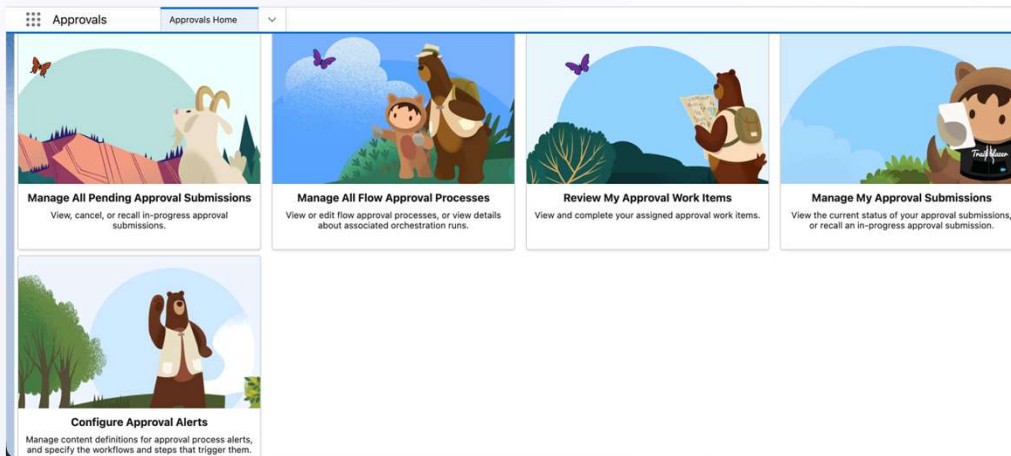
- **Approval Submitter**

- App Permissions: Run Flows
- Object Permissions: Approval Submission READ

Settings

Approvals App

The Approvals App homepage consists of 5 tiles

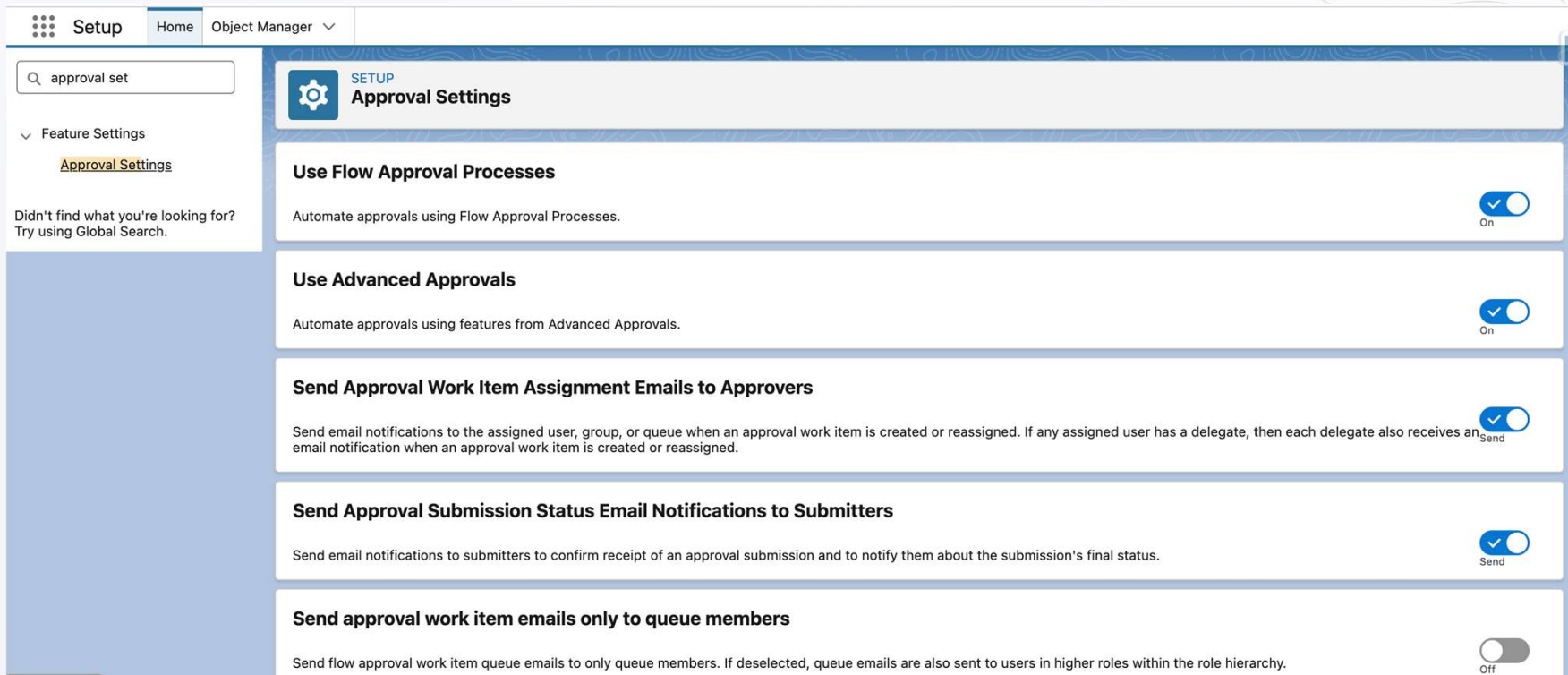


- **Manage All Pending Approval Submissions**
 - Approval Admin Permission
- **Manage All Flow Approval Processes**
 - Approval Designer Permission
- **Review My Approval Work Items**
 - Anyone with Approval Submission object Read
- **Manage My Approval Submissions**
 - Anyone with Approval Submission object Read
- **Configure Approval Alerts**
 - Approval Designer Permission

Settings

Approval Settings

The Approval Settings allows to setup organization wide settings



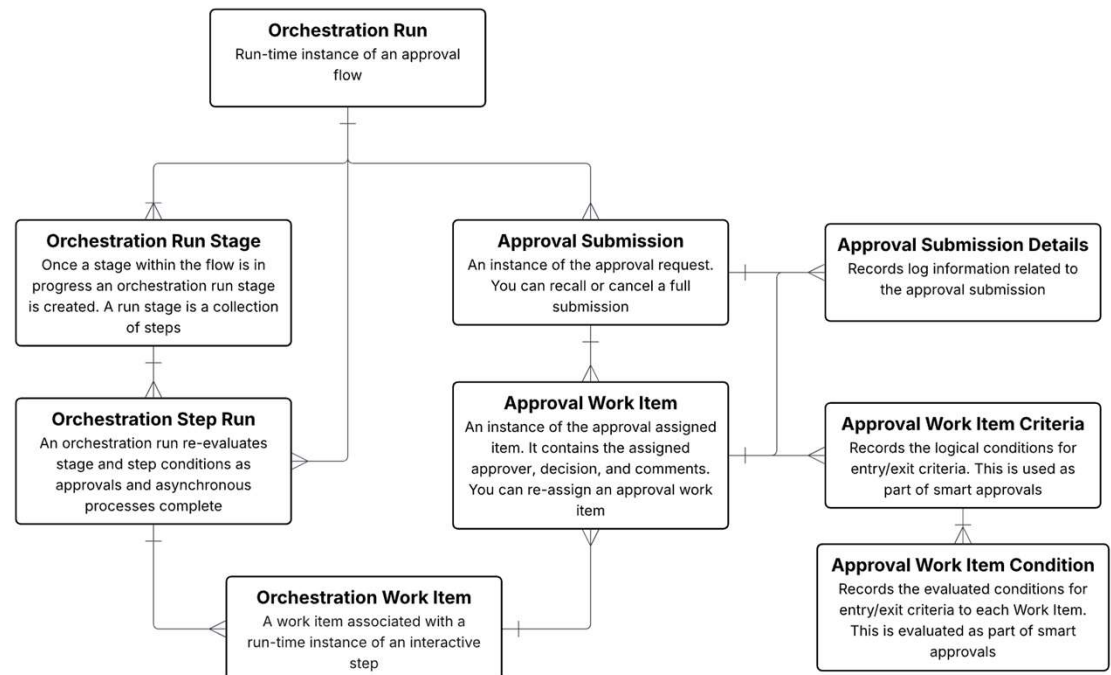
The screenshot shows the 'Approval Settings' page within a software application. The interface includes a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar on the left contains the text 'approval set'. Below the search bar, a 'Feature Settings' section lists 'Approval Settings' as a selectable option. The main content area is titled 'Approval Settings' and contains five toggleable settings:

- Use Flow Approval Processes:** Automate approvals using Flow Approval Processes. (On)
- Use Advanced Approvals:** Automate approvals using features from Advanced Approvals. (On)
- Send Approval Work Item Assignment Emails to Approvers:** Send email notifications to the assigned user, group, or queue when an approval work item is created or reassigned. If any assigned user has a delegate, then each delegate also receives an email notification when an approval work item is created or reassigned. (Send)
- Send Approval Submission Status Email Notifications to Submitters:** Send email notifications to submitters to confirm receipt of an approval submission and to notify them about the submission's final status. (Send)
- Send approval work item emails only to queue members:** Send flow approval work item queue emails to only queue members. If deselected, queue emails are also sent to users in higher roles within the role hierarchy. (Off)

Settings

Data Model

- Each approval request creates a submission with one or more approval work items
- Approval decisions and comments are captured at the approval work item level
- Approval decisions drive re-evaluation of orchestration stages and steps
- All approval activity is recorded for auditability and reporting purposes



Approval Processes

- Autolaunched Flow Approval Processes are triggered via button⁽¹⁾ GS1
- Record-Triggered Flow Approval Processes are triggered via a record update
- Sequential approval -> multiple stages
- Parallel approval -> multiple steps
- Sequential & parallel approval -> multiple stages & steps

(1): [follow salesforce documentation for approval button on a quote](#)



Autolaunched Flow Approval Process (No Trig...

Launches when invoked by Apex, REST API, custom buttons, or custom links. A flow approval process lets you create a multi-step, multi-user approval process.



Record-Triggered Flow Approval Process

Launches when a record is created or updated. A flow approval process lets you create a multi-step, multi-user approval process.

Slide 10

GS1 [@Luca Belligoli] I remember for metronet we needed a custom LWC invoked via button, right? Is that still needed? Worth mentioning this here? Cc [@Khaled Halabieh]

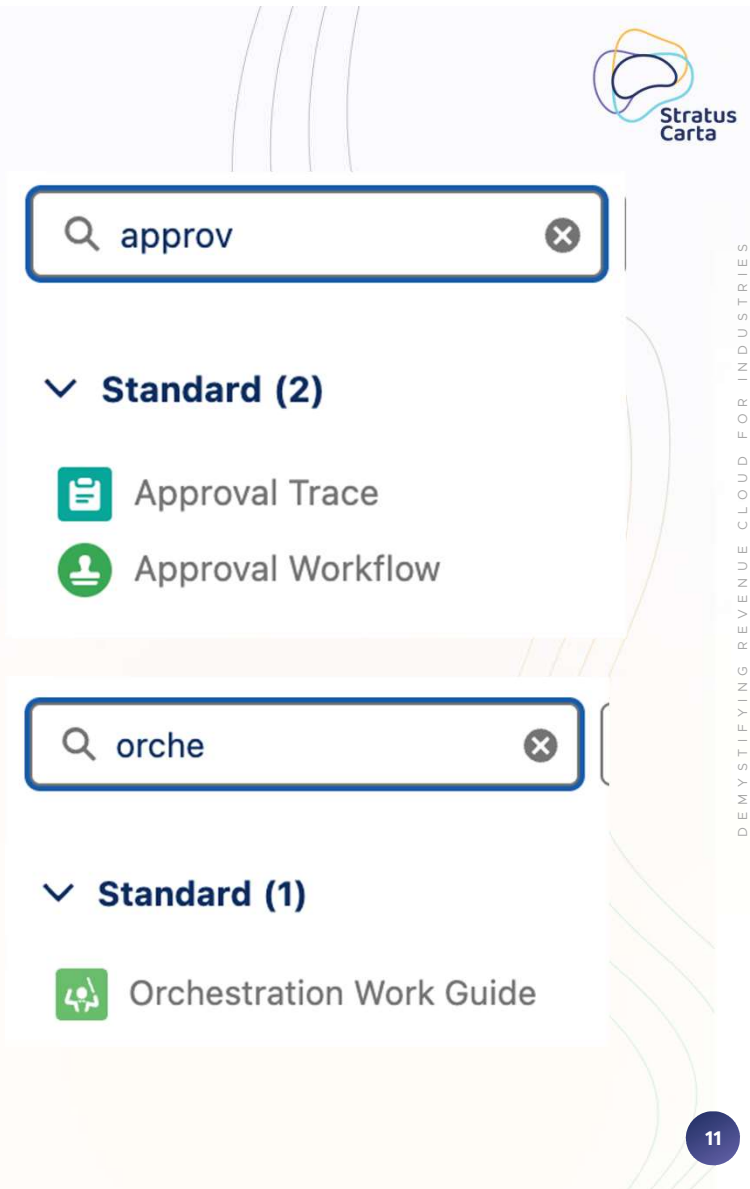
Georgii Saveliev, 2026-02-17T13:07:55.349

1 0 yeah its documented.. ill mention that

Khaled Halabieh, 2026-02-18T09:25:54.183

Lightning Components

- **Approval Trace** – displays all the Approval Work Items with their statuses, assignee, comments, etc.
- **Approval Workflow** – Preview Approval component. This component requires the approval flow to be of autolaunched type
- **Orchestration Work Guide** – allows the approver to approve/reject and add comments



Considerations

- Conditions
 - Maximum of 10 conditions for both entry & exit criteria
 - Leverage formula variable to evaluate more conditions vs evaluation flows because evaluation flows break smart approvals
- For parallel approvals, use the Lock action instead of the flow's record lock element, which only works for a single step
- To enable smart approvals on a step, check the "Use Smart Approvals" checkbox
- Approval Chain name will be used in constructing the Preview Approval component

Invocable Actions

- As of Spring '26 (260), Invocable Actions are only available in screen flows or apex
- Cancel Approval Submission will cancel the approval submission and outstanding child approval work items

The screenshot displays the Stratus Carta application interface. At the top right is the Stratus Carta logo. Below it, a search bar is labeled 'Action'. The search results are titled 'Flow Approval Process Actions'. A search input field contains the text 'Search in Flow Approval Process...'. Below the search bar, there are 6 results listed, each with a lightning bolt icon and a description:

- Cancel Approval Submission**
cancelApprovalSubmission-cancelApprovalSubmission
- Create Flow Approval Process**
createFlowApprovalProcess-createFlowApprovalProcess
- Override Approval Work Item**
overrideApprovalWorkItem-overrideApprovalWorkItem
- Reassign Approval Work Item**
reassignApprovalWorkItem-reassignApprovalWorkItem
- Recall Approval Submission**
recallApprovalSubmission-recallApprovalSubmission
- Review Approval Work Item**
reviewApprovalWorkItem-reviewApprovalWorkItem

On the right side of the interface, there is a vertical text label: 'DEMYSTIFYING REVENUE CLOUD FOR INDUSTRIES'. In the bottom right corner, there is a blue circle with the number '13'.

Preview Approvals

- Only works with autolaunched approval flows
- All entry and exit criteria need to be marked complete, or else an “internal error..” message appears
- Any asynchronous job in the background step will display asynchronous error message when trying to preview approvals.

Asynchronous jobs include:

- Any background step containing an action like update, delete, insert
- Use of subflows in the background step
- Any external callout

Smart Approvals

- To enable smart approvals for an approval step, check the “Use Smart Approval” checkbox in the approval step
- Conditions need to be set on the approval step itself
 - If conditions were set in a decision node prior to the stage, then smart approvals won’t be eligible
- ONLY numeric or text conditions work with smart approvals
 - If any other data type were included, then smart approvals won’t be ineligible
- Using the NOT operator won’t work with smart approvals
- Smart approvals will not be considered when there is a new flow version activated
- Smart approvals will ONLY be considered when the prior approval submission status is “Recalled” or “Rejected”



Use Case

Design

Discount Use Case

Discount % ▾	Auto ▾	Sales Ops ▾	Manager ▾	Finance ▾
0-5%	✓	×	×	×
5-10%	×	✓ (1)	×	×
10-15%	×	✓ (1)	✓ (2)	×
>15%	×	✓ (1)	✓ (2)	✓ (3)

Slide 17

GS1 [@Khaled Halabieh] could you populate this out with the sample use case?
Georgii Saveliev, 2026-02-17T13:14:38.943



Demo



Thank You
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