

Take the following steps to send the approval email:

1. Set up anonymous service (if your Creatio instance is located in cloud, please request to set up these settings from Creatio support):
  - a. Copy to folder `..\Terrasoft.WebApp\ServiceModel\` file `GlbEmailApprovalService.svc`
  - b. Add to `..\Terrasoft.WebApp\Web.config`:

```
<location path="ServiceModel/GlbEmailApprovalService.svc">
  <system.web>
    <authorization>
      <allow users="*" />
    </authorization>
  </system.web>
</location>
```

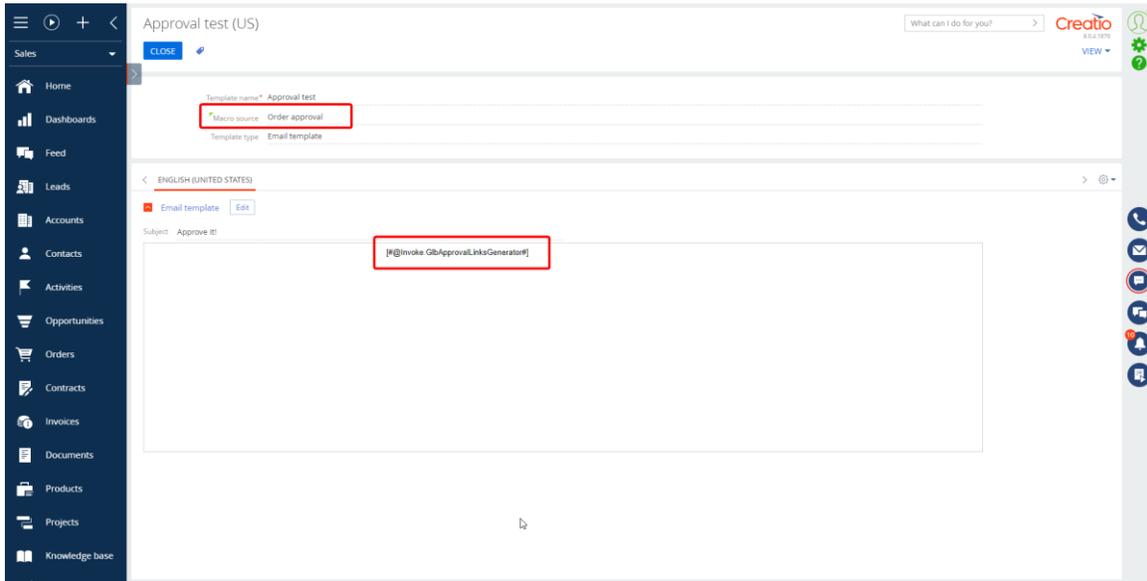
- c. In the same document at the end of `[AllowedLocations]` add `“;ServiceModel/GlbEmailApprovalService.svc“`.
  - d. Add to `..\Terrasoft.WebApp\ServiceModel\http` and `..\Terrasoft.WebApp\ServiceModel\https` in file `services.config`:

```
<service
name="Terrasoft.Configuration.GlbEmailApprovalService.GlbEmailApprovalService">
  <endpoint name="GlbEmailApprovalServiceEndPoint"
address=""
binding="webHttpBinding"
behaviorConfiguration="RestServiceBehavior"
bindingNamespace="http://Terrasoft.WebApp.ServiceModel"
contract="Terrasoft.Configuration.GlbEmailApprovalService.GlbEmailApprovalService" />
</service>
```

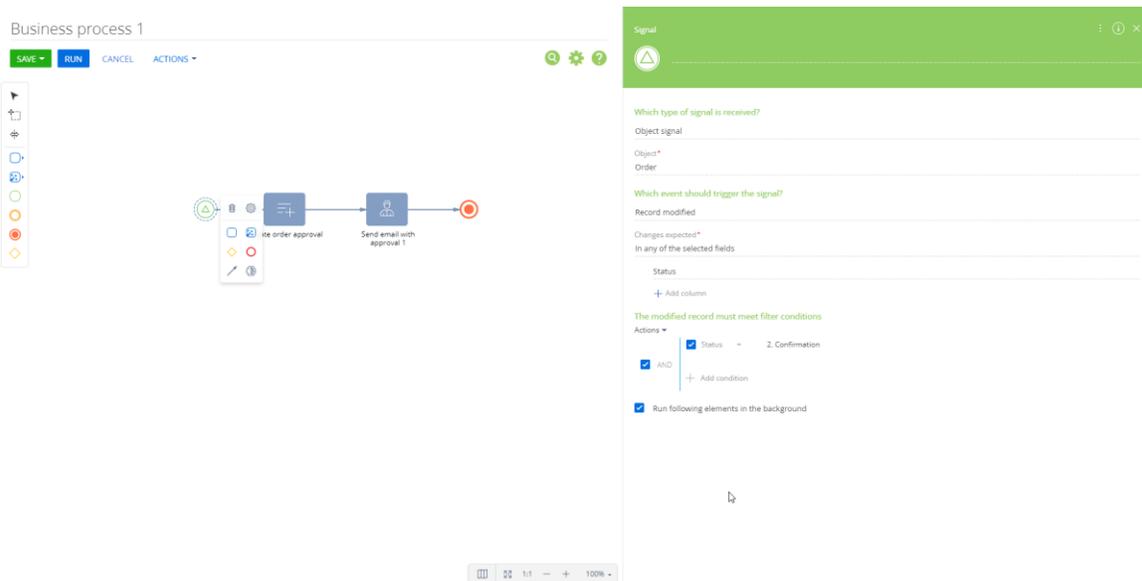
2. [Turn on](#) the "UseAsyncEmailSender" feature.
3. Set up approval buttons in the `[Approval result email items]` lookup (optional).
4. [Create an email template](#) to send for approval:
  - a. Specify the approval object in the `[Macro source]` field. For example, "Order approval" if you create an approval for the `[Order]` section.
  - b. Add approval buttons to the email using the `"[#@Invoke.GlbApprovalLinksGenerator#]"` macro.
5. Make sure the `[SiteUrl]` system setting is populated with the value in the following format: `https://Creatiosite.com/0`
6. Send the email that contains the approval using the `[Send email with approval]` user task in a business process. The package that contains the process must depend on the "GlbEmailApproval" package. Set the following user task parameters:
  - a. Enter the ID of the approval in the `[Approval id]` parameter.
  - b. Enter the email address of the mailbox from which to send the email in the `[Sender email]` parameter. Make sure you added this [mailbox to Creatio](#).
  - c. Enter the ID of the template to send for approval in the `[Template id]` parameter.

**Example.** Send an approval when the order status changes to “2. Confirmation.”

1. Create a template.
  - a. Select the “Order approval” macro source.
  - b. Add the “[#@Invoke.GlbApprovalLinksGenerator#]” macro to the template body.



2. Create a business process.
  - a. Set up the launch signal.



b. Create an approval using the [Add data] element:

- Enter the approval reason in the [Approval purpose] field.
- Select the approver contact in the [Approver] field.
- Enter the ID of the record to approve in the [Order] field. The field name depends on the relevant section.

The screenshot shows the Business Process Designer interface for 'Business process 1'. The main canvas displays a flowchart with two tasks: 'Create order approval' and 'Send email with approval 1'. The 'Add data' configuration panel is open on the right, showing the following settings:

- Which object to add data to? Order approval
- What is the data adding mode? Add one record
- Which column values to set?
  - Approval purpose: Approval required
  - Approver: [#System variable Current user#]
  - Order: [#OrderId#]
- + Add field

c. Call the [Send email with approval] user task:

- Set the [Approval id] parameter to the ID of the record created on the previous step.
- Set the [Sender email] parameter to the email address from which to send the email.
- Set the [Template id] parameter to the ID of template to send for approval.

The screenshot shows the Business Process Designer interface for 'Business process 1'. The main canvas displays a flowchart with two tasks: 'Create order approval' and 'Send email with approval 1'. The 'User task' configuration panel is open on the right, showing the following settings:

- Which user task to perform? Send email with approval
- Process element parameters:
  - Approval id: [#Create order approval.Created record id#]
  - Sender email: tester123350@gmail.com
  - Template id: [#Templateid#]
- Run current and the following elements in the background

The process parameters must look as follows:

The screenshot displays a business process editor for "Business process 1". On the left, a flowchart shows two steps: "Create order approval" and "Send email with approval 1". The "Send email with approval 1" step is highlighted with a red circle. On the right, the "PARAMETERS" tab is active, showing two parameters:

- Id OrderId**: `{!StartSignal!.Unique identifier of record!}`
- Id TemplateId**: `{!Lookup Message template Approval test (US) 68f2abc1-b0b3-42cd-bd8e-d90f510ba563!}`

Buttons for "SAVE", "RUN", "CANCEL", and "ACTIONS" are visible at the top of the editor.

### 3. Test the process.

The screenshot shows a CRM interface for an order record "ORD-12". The "Status" field is highlighted with a red box and contains the value "Confirmation". The interface includes a sidebar with navigation options like "Home", "Dashboards", "Feed", "Leads", "Accounts", "Contacts", "Activities", "Opportunities", "Orders", "Contracts", "Invoices", "Documents", "Products", "Projects", and "Knowledge base". The main content area shows order details for "Customer: Andrew Baker (sample)" with a "Total" of \$ 0.00 and a "Payment amount" of \$ 0.00. The "PRODUCTS" tab is selected, showing "No data".

Approve it!

tester123358@gmail.com  
To: Evgeniy Vorobev

Tue 10/11/2022 18:32

Reject Approve

Reply Forward

ORD-12

Customer: Andrew Baker (sample) Total, \$ 0.00  
Status Payment amount, \$ 0.00

PRODUCTS ORDER DETAILS DELIVERY SUMMARY HISTORY APPROVALS GENERAL INFORMATION ATTACHMENTS AND NOTES FEED

Approvals	Waiting for my approval
Approver Supervisor	Status Negative
	Approval required

Please note, this is only an example of using the [Send email with approval] user task. You can implement it with different settings on your environment according to requirements.