

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>
```

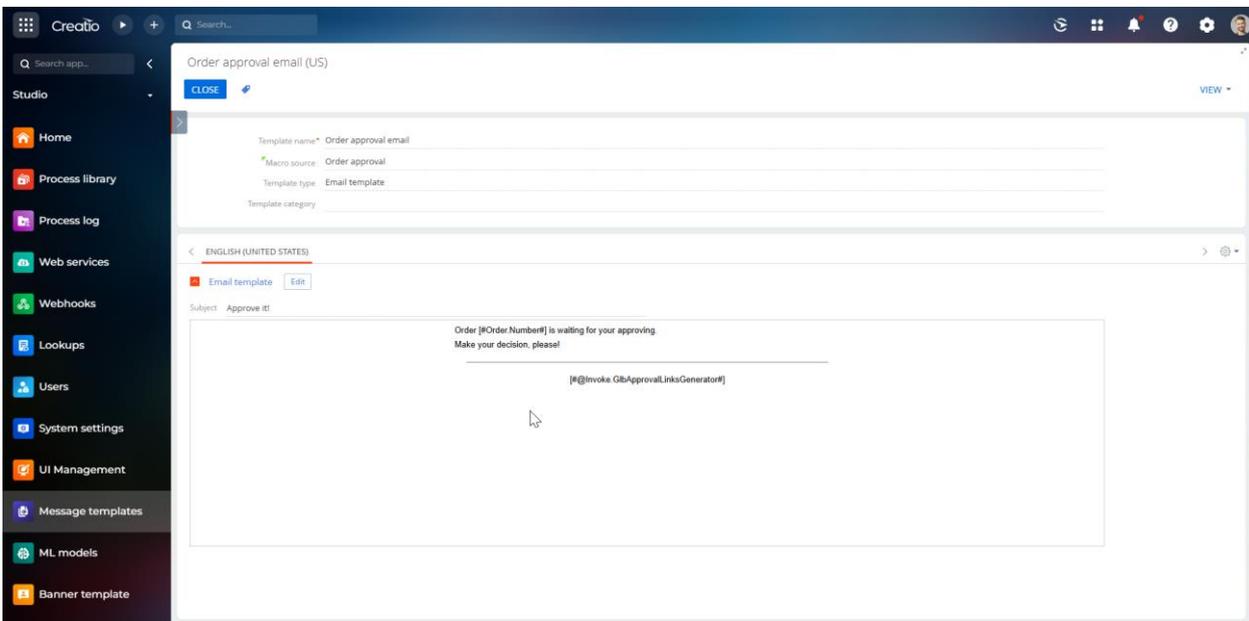
- c. In the same document at the end of [AllowedLocations] add  
“;ServiceModel/GlbEmailApprovalService.svc“.
- d. Add to ..\Terrasoft.WebApp\ServiceModel\http and ..\Terrasoft.WebApp\ServiceModel\https  
in file services.config:

```
<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>
```

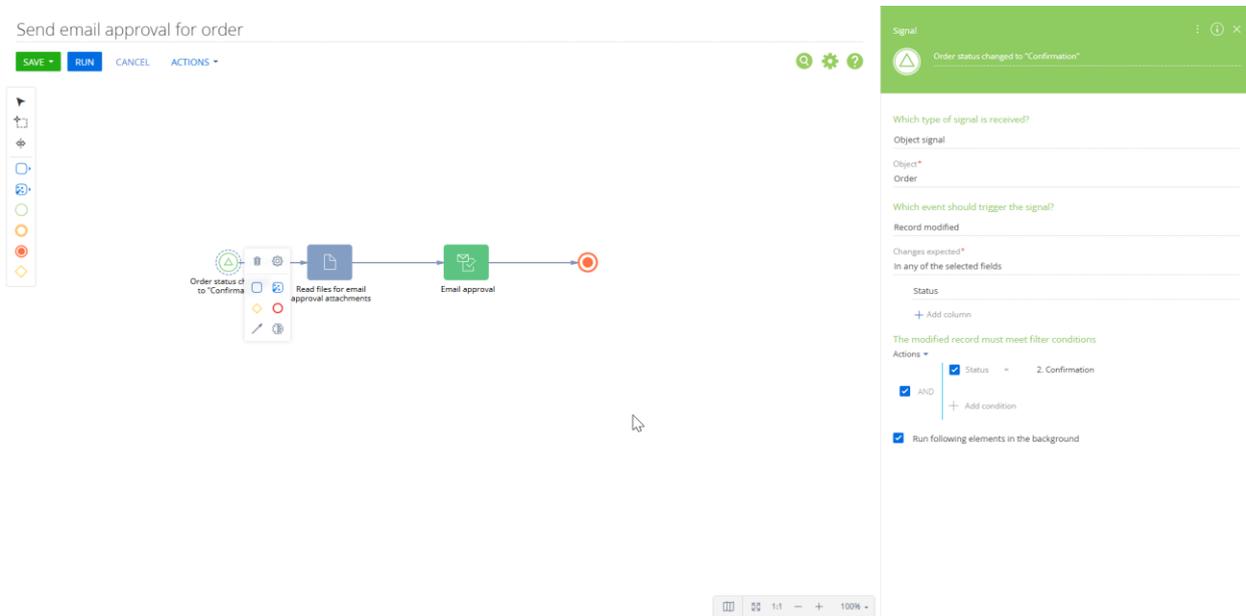
2. Set up approval buttons in the [Approval result email items] lookup (optional).
3. [Create an email template](#) to send for approval:
  - a. Specify the approval object in the [Macro source] field. For example, “Order approval” if you create an approval for the [Order] section
  - b. Add approval buttons to the email using the ”[#@Invoke.GlbApprovalLinksGenerator#]” macro.
4. Make sure the [SiteUrl] system setting is populated with the value in the following format:  
<https://Creatiosite.com/0>
5. Make sure the [VisaMailboxSettings] system setting is populated with mailbox for sending approvals.
6. Send the email that contains the approval using the [Email Approval] user task in a business process user actions. The package that contains the process must depend on the ”GlbEmailApproval” package.  
Set the following user task parameters:
  - a. Enter the approval object in the [Approval object] field and record id to [Record Id] field.
  - b. Specify approver in the [Approver] field and select a approver record (Role/User/Manager).
  - c. Specify [Email template] field with template that contains  
”[#@Invoke.GlbApprovalLinksGenerator#]” macro.

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 [Email Approval] element for creating and sending email approval:
      - Specify the [Approval object] and approval [Record Id]
      - Select [Approver] and specify approver record (User/Role/Manager)
      - Select [Email template] with specified macros
      - Add attachments (optional)

### Send email approval for order

SAVE RUN CANCEL ACTIONS

Order status changed to "Confirmation" → Email approval

1. Approval purpose  
Approval required

2. Approval object  
Orders  
Record id\*  
[#Order status changed to "Confirmation".Unique identifier of record#]

3. Approver  
User  
Employee  
[#Lookup.Users (view) Andrew Baker.fbf06d71-9fa9-49f9-987c-4a390934275d#]

4. Email approval  
Email template\*  
[#Lookup.Message template Order approval email (US).acd367c1-32f6-4...

5. Add attachments +

6. Send email notification ⓘ

7.  Notify that approval is required

8.  Notify about the approval result

9.  Ignore errors on sending

10.  Run following elements in the background

### 3. Test the process.

ORD-3

1. Draft → 2. Confirmation → 4. Completed

Total: 900.00 \$

Due date: N/A

Number of products: 1

Approver	Approval purpose	Created on	Set on	Set by	Status
Andrew Baker	Approval required	6/3/2025 2:01 PM			To set

### Approve it!

M [redacted]@gmail.com

To: Nick

Tue 06/03/2025 19:46

Order ORD-3 is waiting for your approving.  
Make your decision, please!

# Creatio

Approval status changed

ORD-3

Close Send for approval

1. Draft 2. Confirmation 4. Completed

Total: 900.00 \$ Planned date: N/A Due date: N/A Number of products: 1

Order info: Number: ORD-3, Recipient's name: John Best, Account: Accom (sample), Contact: Andrew Baker(sample), Payment amount: 0.00, Oversee: Supervisor, Currency: US Dollar, Planned end date, Order channel, Opportunity

PRODUCTS APPROVALS PAYMENT & DELIVERY DOCUMENTS TIMELINE

Approvals list

Approver	Approval purpose	Created on	Set on	Set by	Status
Andrew Baker	Approval required	6/3/2025 7:46 PM	6/3/2025 7:49 PM	Supervisor	Positive

Please note, this is only an example of using the [Email Approval] process element. You can implement it with different settings on your environment according to requirements