# SESSION 19

Approval Process

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process.

Navigation:

Setup ---- Build --- Create --- Workflows & Approval Process ---- Approval Process

1. **Select the Object to define the approval process (whose record is to be submitted for approval)**
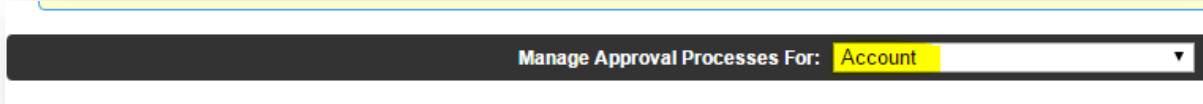
Salesforce provides two types of wizard to create the approval process:

1. **Jump Start Wizard:** This wizard is used to create a simple approval process or one-step approval process. This wizard allows you to quickly create an approval process where everything will be available on the same screen; you do not have to move from one screen to another.
2. **Standard Wizard**: This wizard is used to create complex approval processes. It consists of certain setup wizards that allow you to define your process, and another particular setup wizard that allows you to define each step in the process.
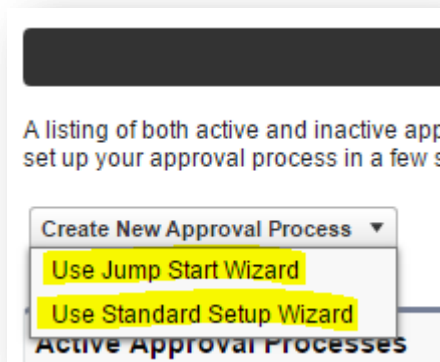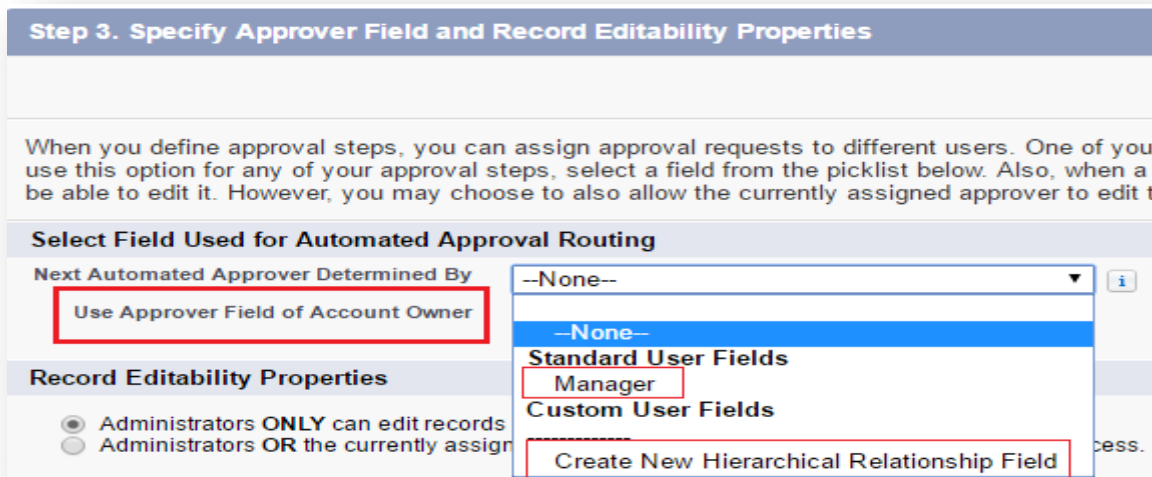

1. **PROCESS DEFINITION**

Step 1. Enter the name of the approval process to be unique among the object on which approval process is defined.

Step 2. Control Which Records Apply to an Approval Process

Option	To enter the approval process...
criteria are met	The record must meet the filter criteria. Entry Criteria is based on Current Object Field and **its Master Object Fields** (Only MD Relationships allowed) and on currently logged in user fields.
formula evaluates to true	The formula must return True. Some functions aren't available in approval process formulas. Entry Criteria is based on Current Object Field and **its parent Object Fields** (Master-Detail or Lookup) and on currently logged in user fields.

Step 3. Choose an Automated Approver throughout an Approval Process

Associate a hierarchy field—such as the user's manager—with an approval process. When selected, the field is available as an assigned approver option for approval steps. You can always select a hierarchy field here but not use it for any approval steps.
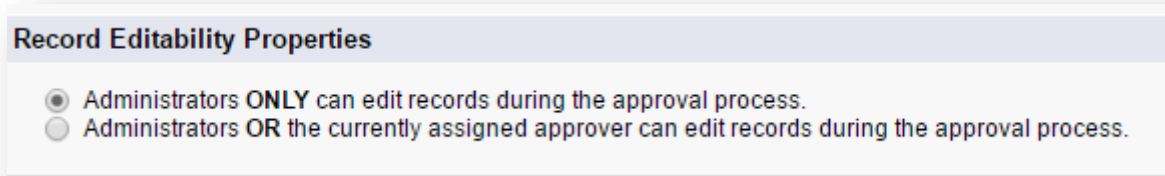
Step 3. Specify Approver Field and Record Editability Properties

When you define approval steps, you can assign approval requests to different users. One of your use this option for any of your approval steps, select a field from the picklist below. Also, when a r be able to edit it. However, you may choose to also allow the currently assigned approver to edit th

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By

--None--

Use Approver Field of Account Owner

Record Editability Properties

○ Administrators ONLY can edit records

○ Administrators OR the currently assign

If Selected	Description
"--None-	Then approval requests aren't automatically assigned based on a field. Instead, you manually specify a user to approve all approval requests.
Manager	Then approval requests are automatically assigned to manager of an user as per the user page.
Custom New Hierarchical Relationship	Then a new custom field of lookup to user object will be created. Then the approval requests are automatically assigned to the user specified in this custom hierarchy field.

Use Approver Field of Object Owner (highlighted in red). If selected, the first executed approval step sets the approver to the value of Field (Manager Field) on the record owner's user record—instead of the submitter's user record.

Specify Who Can Edit Locked Records

When a record is submitted for approval, it's locked to prevent users from editing it during the approval process. Use the record editability properties to determine who can edit records that are locked in this approval process.

Option	Description
Administrators ONLY...	Default. Lets users edit the record that's pending approval only if they have: ▪ The "Modify All" object-level permission for the given object, or ▪ The "Modify All Data" permission
Administrators OR...	Lets the assigned approver and admins edit the record.

Record Editability Properties

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

Step 4. Choose Approval Request Notification Templates

When an approval process assigns an approval request to a user, Salesforce sends the user an approval request email. If Approvals in Chatter is enabled, Salesforce also posts the approval request to Chatter. Choose templates for each of these notifications.

Field	Description

Field	Description
Approval Assignment Email Template	Choose a custom email template to use when notifying approvers that an approval request is assigned to them. Or leave blank to use the default email template. The approval process uses the same template for every assignment email—no matter which approval step it's for.
Approval Post Template	Available only when Approvals in Chatter is enabled. Choose an approval post template to use when notifying approvers via a post in their Chatter feed. Leave blank to use the default post template for this object or, if there isn't one, the system default template.

> **Note**
> If email approval response is enabled, be sure that the email template you use describes how to correctly use both response options: clicking the link and replying by email. If the user doesn't respond correctly (for example, if the user misspells approve or types it on the wrong line), Salesforce doesn't register the user's response.

Step 5. **Design the Approval Request Page**

The approval page is where an approver responds to an approval request. Customize which fields appear on that page and in which order. This page is used only for this approval process.

Option	Description
Selected Fields	Specifies which fields to display on the approval request page. Keep in mind that approvers could view this page on a mobile device. Select only the fields necessary for users to decide whether to approve or reject records.
Display approval history information...	If selected, the approval request page displays the approval history of the associated record.
Security Settings	Controls whether users have to log in to Salesforce to see the approval request. **Allow approvers to access the approval page only from within the application (Recommended)** Default. Users log in to Salesforce to view the approval page. **Allow approvers to access the approval page only from within the application, or externally from a wireless-enabled mobile device** Users can access an external version of the approval page from a browser, including browsers on mobile devices, without logging in to Salesforce. If selected, you can't add approval steps that let users manually select the next approver.

**Step 6**. Specify Who Can Submit Records to an Approval Process
Only specified individuals or roles can submit a record for approval.

You can also let submitters recall an approval request.

Submitter Type	Select a type or search to populate the Available Submitters list.
Allowed Submitters	If the user who submits a record for approval isn't included in this list, the record doesn't enter this approval process—even if the record meets the entry criteria.
Allow submitters to recall approval requests	If selected, submitters can recall their approval requests. If unselected, only admins can recall requests. This option is useful for situations where things can change on the submitter's side while waiting for an approval. For example, an opportunity could be lost after the user submits it for approval.

2. INITIAL SUBMITTION

Specify Actions for INITIAL SUBMITTION. The actions are highlighted below.
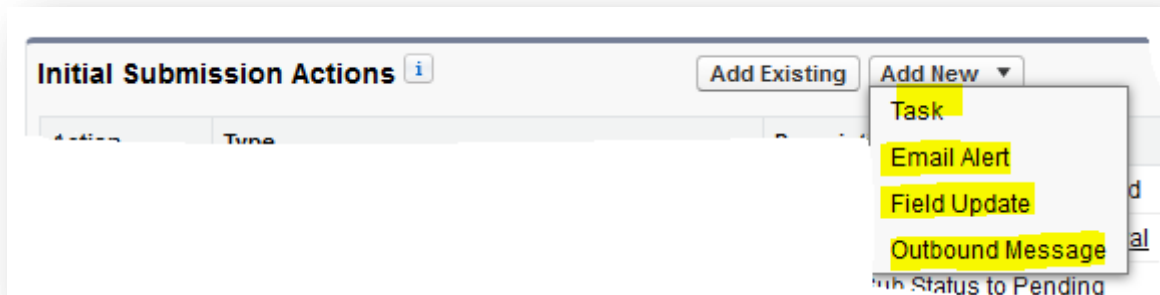
Add an Approval Step to an Approval Process

Approval steps define the chain of approval for a particular approval process. Each step determines which records can advance to that step, who to assign approval requests to, and whether to let each approver's delegate respond to the requests. The first step specifies what to do if a record doesn't advance to that step. Later steps specify what happens if an approver rejects the request.

Steps are executed in the order specified.
1. **Control Which Records Apply to an Approval Step**
   Control which records are part of the approval step by setting the step's criteria. You can also specify what happens to records that don't meet the step's criteria.
2. **Identify Assigned Approvers for an Approval Step**
   Specify who to send an approval request for this step to.
3. **Specify Rejection Behavior for an Approval Step**
   Configure what happens if an approver rejects a request. The final rejection actions for the approval process determine the first step's rejection behaviour.

3. APPROVAL STEPS

Control Which Records Apply to an Approval Step

Control which records are part of the approval step by setting the step's criteria. You can also specify what happens to records that don't meet the step's criteria.
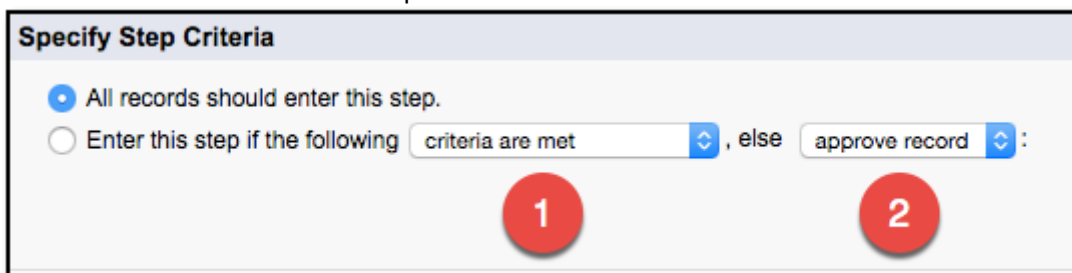
Criteria Options

If all records go through this approval step, leave **All records should enter this step** selected.
If only certain types of records should enter this process, select **Enter this step if the following...** and choose the appropriate option **(1)**.

(2) Else Options for Approval Step Criteria

If you specified filter criteria or entered a formula, choose what happens to records that do not meet the criteria or if the formula does not return True.

> **Note**
> You can't change your selection after the approval process has been activated, even if you deactivate the approval process.

Option	Description
approve record	Approves the request and performs all final approval actions.
reject record	Rejects the request and performs all final rejection actions. This option is available only for the first step in the approval process.

go to next step	Skips this step and goes to the next step. Available only when there's a later step. When you apply this option in the first step, keep in mind:
	    If the record doesn't meet the criteria for any subsequent steps, the record is rejected.
	    If you delete all later steps, Salesforce rejects the record.
	When you apply this option in another step, keep in mind:
	    If you delete all later steps, Salesforce ends the process.

Identify Assigned Approvers for an Approval Step

If Multiple Approvers

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Select Approver

- ○ Let the submitter choose the approver manually.
- ○ Automatically assign using the user field selected earlier. (**Manager**)
- ● Automatically assign to approver(s).

| User ▾ | [   ] | 🔍 |

| Related User ▾ | --None-- ▾ |

| User ▾ | [   ] | 🔍 |

Add Row Remove Row

When multiple approvers are selected:
- ● Approve or reject based on the **FIRST** response.
- ○ Require **UNANIMOUS** approval from all selected approvers.

☐ The approver's delegate may also approve this request. ⓘ

Select Approver	Specify who to assign the approval to. **Let the submitter choose the approver manually. (default)** Prompts the user to select the next approver. **Automatically assign an approver using a standard or custom hierarchy field.** Assigns the approval request to the user in the field displayed next to this option. You select this field when you configure the approval process. **Automatically assign to a queue.** Available only for objects that support queues. Assigns approval requests to a queue. **Automatically assign to approver(s).** Assigns the approval request to one or more specific users, specific queues, or users related to the submitted record. You can add up to 25 per step.
When multiple approvers are selected:	Available only when Automatically assign to approver(s) is selected. **Approve or reject based on the first response.** The first response to the approval request determines whether the record is approved or rejected. **Require unanimous approval from all selected approvers.** The record is approved only if everyone approves the request. If any approvers reject the request, the approval request is rejected.
The approver's delegate may also approve this request	Users can identify a delegate in their approval settings. Delegated approvers can't reassign approval requests; they can only approve or reject them.

4. ACTIONS

Finally specify actions for FINAL APPROVAL. REJECTION and RECALL.

Specify Rejection Behaviour for an Approval Step

Configure what happens if an approver rejects a request. The final rejection actions for the approval process determine the first step's rejection behaviour.

Option	Description
Perform all rejection actions...	Rejects the request completely even if previous steps were approved. Salesforce performs all rejection actions specified for this step and all final rejection actions.

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