**Approval Process Management Superbadge Unit**

Steps followed:

1. Create Developer Org with the link and connect it to the trailhead account
2. Add the Approval Status field to the Enhancement Request object
3. Make the New field value as default.
4. Create a new Approval Process with the specified entry criteria
   1. Approval Status – New
   2. Description, Priority, Type, Date Needed – Not Empty
5. Use the email template New Enhancement Request and add the visible fields
   1. Enhancement Request Name
   2. Enhancement Size
   3. Proposed Implementation Date
6. Select the appropriate options for:
   1. Each owner of an enhancement request record is responsible for submitting their own requests for approval.
   2. Allow submitters to recall approval requests.
7. Add the initial approval step (Update Approval Status Submitted (with API name Update\_Approval\_Status\_Submitted)) to change the Approval Status field to Submitted.
8. Create a new approval process named Salesforce Admins and have no entry criteria.
9. Create a 2nd approval process named Center of Excellence and have the entry criteria (Type – New Feature Request)
10. Create a 3rd approval process named IT Leaders and have the entry criteria (Type – New Data Integration)
11. Change the entry criteria of Center of Excellence to go to 3rd approval process if criteria do not match
12. For the 2nd approval process, create an approval action of type Email Alert with name Enhancement Request Approved Alert (with API name Enhancement\_Request\_Approved\_Alert) and use the Lightning template **Enhancement Request Approved**. Add the SF Admin role to recipient and the Enhancement Request Owner.
13. For the 3rd approval process, add the existing email alert for approval action.
14. Create the final approval action, Update Status to Approved (with API name Update\_Status\_to\_Approved) with field update of Approval Status to Approved.
15. Create the final rejection action, Update Status to Deferred (with API name Update\_Status\_to\_Deferred) with field update of Approval Status to Deferred.
16. Activate the Approval process.
17. Add the Submit for Approval button on the page layout of the Enhancement Request object.
18. Go to Lightning App Builder and edit the Home\_Page\_Default to have the Items to Approve component in the page.

Mistakes:

1. Added the final approval and final rejection actions as the approval and rejection steps of the Salesforce Admins approval step. Resolved the same after the 2nd check on trailhead.
2. Added an extra checkbox field to check the entry criteria for the approval process along with a flow. This turned out to be unnecessary.
3. Added entry criteria to the 1st approval step which was unnecessary.