**Phase 8: Approval Processes**

**1. Objective**

The objective of this phase was to enforce **control and compliance** in the Loyalty Program by requiring approvals from Support Managers before sensitive customer actions are finalized.

This ensures:

* **High-value redemptions** are reviewed before points are spent.
* **Customer contact changes** are properly approved.
* **Managerial oversight** exists for potential fraud prevention or errors.

**2. Approval Process Implemented**

We created **two approval processes**:

**2.1 Reward Redemption Approval Process**

**Business Requirement**

When a customer submits a **Reward Redemption** request (e.g., redeeming ₹500 or more), the request should go through approval before being finalized.

**Configuration Steps**

1. **Object:** Reward\_Redemption\_\_c
2. **Entry Criteria:**
   * Status\_\_c = 'Submitted'
   * Amount\_\_c >= 500  
     (Smaller redemptions are auto-approved; higher-value ones need review.)
3. **Approver:**
   * Routed to the **Support Manager’s Manager field**.
   * Alternative: Custom User field Approver\_\_c (lookup to User).
4. **Initial Submission Actions:**
   * Lock record (customer cannot modify).
   * Send email notification to approver.
5. **Approval Actions:**
   * Update Status\_\_c = 'Approved'.
   * Send email notification to customer (using template “Reward Redemption Approved”).
6. **Rejection Actions:**
   * Update Status\_\_c = 'Rejected'.
   * Send rejection email to customer.

**Business Value**

* Prevents unauthorized or fraudulent high-value reward requests.
* Provides a clear audit trail of approvals/rejections.

**2.2 Contact Approval Process**

**Business Requirement**

Some contact updates (e.g., VIP flag, sensitive customer info changes) require Support Manager approval.

**Configuration Steps**

1. **Object:** Contact
2. **Entry Criteria:**
   * VIP\_\_c = True OR Tier\_\_c = 'Platinum'  
     (Only sensitive contacts are routed for approval.)
3. **Approver:**
   * Routed to **Support Manager**.
4. **Initial Submission Actions:**
   * Lock record to prevent changes during review.
   * Notify manager by email.
5. **Approval Actions:**
   * Unlock record.
   * Update Approved\_\_c = True.
   * Send confirmation email to customer or internal staff.
6. **Rejection Actions:**
   * Unlock record.
   * Send rejection email to staff (with reason).

**Business Value**

* Ensures VIP and Platinum customer records are carefully managed.
* Avoids accidental or unauthorized changes to critical contact data.

**3. Email Templates**

We created and associated **email templates** for approval notifications:

1. **Reward Redemption Approval Request** – sent to Support Manager when request is submitted.
2. **Reward Redemption Approved** – sent to customer upon approval.
3. **Reward Redemption Rejected** – sent to customer if denied.
4. **Contact Approval Request** – sent to Support Manager for contact updates.
5. **Contact Approved/Rejected** – internal communication.

**4. Testing Scenarios**

**Reward Redemption Approval Test**

1. Customer Ramesh submits redemption for ₹6000.
2. Approval request routed to Support Manager.
3. Support Manager logs in → sees request under “Approval Requests”.
4. Approves → record status updates to **Approved**, customer gets email.
5. Rejects → record status updates to **Rejected**, rejection email sent.

Verified: Flow, notifications, and status updates work correctly.

**Contact Approval Test**

1. Update Ramesh’s contact → set VIP\_\_c = True.
2. System routes approval request to Support Manager.
3. Manager approves → record unlocked, Approved\_\_c = True.
4. Manager rejects → record unlocked, staff notified.

Verified: Lock/unlock behavior and routing works correctly.

**5. Business Benefits**

* **Manager Oversight:** Ensures sensitive actions aren’t auto-processed.
* **Fraud Prevention:** Prevents misuse of loyalty points.
* **Audit Trail:** Each approval/rejection is logged.
* **Customer Satisfaction:** Platinum/VIP handling shows professionalism.

**6. Key Challenges & Fixes**

* **Error:** “No applicable approval process found.”
  + Fixed by adjusting entry criteria.
* **Error:** Manager didn’t see approval request.
  + Fixed by assigning correct Approver field (Manager).
* **Error:** Email template merge field issues.
  + Fixed by using correct prefix (e.g., Reward\_Redemption\_\_c.FieldName).



