



GETTING STARTED WITH APPROVAL PROCESSES

Summary

Plan each approval process carefully to ensure a successful implementation.

Approval Process Checklist

Plan each approval process carefully to ensure a successful implementation.

Review the following checklist about preparing the appropriate information before creating your approval process.

- Prepare an approval request email template.
- Prepare an approval request post template.
- Determine the approval request sender.
- Determine the assigned approver.
- Determine the delegated approver.
- Decide if your approval process needs a filter.
- Design initial submission actions.
- Decide if users can approve requests from a wireless device.
- Determine if users can edit records that are awaiting approval.
- Decide if records should be auto-approved or rejected.
- Determine how many levels your process has.
- Determine the actions when an approval request is approved or rejected.

What email template do you want to use for approval requests?

The email template you specify on an approval process is used when notifying users that an approval request is assigned to them. You can use the default email template Salesforce offers if it is appropriate for your approval process, or you can create your own email template. Include the appropriate approval process merge fields to link directly to the approval request.

If your organization has enabled email approval response, the default email template includes instructions for replying to an email approval request by typing *approve*, *approved*, *yes*, *reject*, *rejected*, or *no* in the first line of the email body, and optionally adding comments in the second line.

What Chatter post template do you want to use for approval requests?

If your organization has Approvals in Chatter enabled, you can specify an approval post template to use when notifying users via Chatter that an approval request is assigned to them. You can use the default post template Salesforce offers if it is appropriate for your approval process, or you can create your own post template.

Who should be the sender of approval requests?

Approval request notifications are automatically sent from the user who submitted the record for approval. When you configure an email alert, you can set it to use a different return email address for these notifications. You can choose the email address of the default workflow user if you've created one, or a previously configured and verified organization-wide address. Determine what email address to use.

Who can approve requests?

Requests can be approved or rejected by any of the following:

- A user or queue that the approval request submitter chooses.
- A queue specified by the administrator.
- A user listed in the `Manager` standard field on the submitter's user detail page.
- A user listed in a custom hierarchy field on the submitter's user detail page.
- Any combination of users and related users (users listed in a standard or custom field on the submitted record) specified by the administrator.

Each step in your approval process can assign approval requests using any of these options.

Should approval requests be delegated to another user for approval?

An approval request can be approved by an approver's designated delegate. However, you can disable this option. Decide if you want to allow delegated users to approve requests. Then, for each user, populate the `Delegated Approver` field on the user's detail page.

What records should be included in this process?

Determine what attributes a record must have to be included in your approval process. If necessary, create the custom fields to store this information so that you can use it in your filter criteria. For example, if you want to include expense records from your headquarters office only, create a custom picklist field called `Office Location` that has two options: "HQ" and "Field." Then, you would specify in your filter criteria that records must have "HQ" in the `Office Location` field to be included in the approval process.

What should happen when a record is first submitted for approval?

When users submit a record for approval, Salesforce automatically locks the record so that other users cannot change it while it is awaiting approval. You can still add campaign members to campaigns locked for approval.

Decide if you want other workflow actions to happen when a record is first submitted, such as email alerts, tasks, field updates, and outbound messages. These actions become your Initial Submission Actions.

Should users be able to approve requests from a mobile device?

Determine if you want to require users to log in to Salesforce to approve requests. You can also set up your approval process to allow users to approve requests remotely using a mobile browser.

Who can edit records that are awaiting approval?

Records submitted for approval are automatically locked. Users with the "Modify All" object-level permission for the given object, or the "Modify All Data" permission, can always unlock a record and edit it. However, you may also specify that the currently assigned approver can edit the record as well. You can still add campaign members to campaigns locked for approval.

Should records be automatically approved, rejected, or skipped based on certain criteria?

You can set entry criteria for each step of your process, and configure Salesforce to automatically approve, reject, or skip the process if a record does not meet that entry criteria. For example, all expenses submitted with an `Amount` less than \$15 are automatically approved.

How many people need to approve these requests?

An approval process can have several layers of approvals. Determine how many users need to approve requests and in what order.

Should any actions happen when a request is approved or rejected?

You can set up to 40 additional actions to take place when a request is recalled, approved, or rejected at each step, up to 10 of each of the following types:

Type	Description
Task	Assigns a task to a user you specify. You can specify the <code>Subject</code> , <code>Status</code> , <code>Priority</code> , and <code>Due Date</code> of the task.
Email Alert	Uses an email template you specify to send an email to a designated recipient.
Field Update	Changes the value of a selected field. You can specify a value or create a formula for the new value.
Outbound Message	Sends a message to an endpoint you designate. You can also specify a username and the data you want to include in the message.

You can also set up to 40 additional actions to take place when a record has received all necessary approvals or is completely rejected.