

Salesforce approval process | what is approval process in Salesforce

What is Salesforce approval process & How to Create Approval Process in Salesforce.

In our previous [Salesforce](#) Training we have learned about [Salesforce Workflow Rule](#) and [Workflow Actions](#). In this [Salesforce Tutorial](#) we are going to learn about what is Salesforce Approval process and also we learn how to create Salesforce Approval Process with an example.

What is approval process in Salesforce?

Approval Process in Salesforce are the automated process where every organization uses to approve records. In Salesforce Approval process there are number of steps involved to approve a [record](#) in that [object](#) or the one records which satisfies the rule criteria.

Important Points to be considered before creating Approval Process in Salesforce.

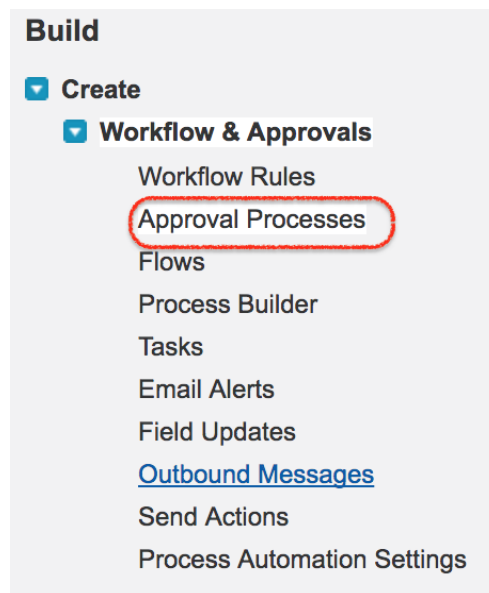
1. Entry criteria for Approval Process in [Salesforce](#) must be defined.
2. Approval request [email template](#) must be created.
3. We should gather approval request sender details.
4. Determine who is the assigned approver and Delegate approver.
5. We must know whether the approval process needs a filter logic or not.
6. We must create initial submission actions like email alerts, field updates, tasks, outbound message, updating custo approval status field to **"In progress"**.
7. We can [set permissions](#) that users can request approval from a wireless device
8. And also we can determine that the users can Edit records that are awaiting for approval.
9. And finally we have to assign the actions when an approval requests is approved or rejected.

How to create Salesforce approval process?

Now let us consider an example where all invoices which are greater than 10000 rupees the invoice must be approved by the Supervisor. While creating Salesforce Approval Process we there are 8 steps involved.

Creating Salesforce Approval Process.

- Go to **Setup | Build | Create | [Workflow & Approvals](#) | Approval Process.**



- Click on Approval Processes as shown above.

Step 1 : Enter Name and Description for new Approval Process.

Step 1. Enter Name and Description Step 1 of 6

[Next](#) [Cancel](#)

Enter a name and description for your new approval process.

Enter Name and Description ! = Required Information

Process Name

Unique Name [i](#)

Description

[Next](#) [Cancel](#)

- Enter name and description.
- Click on Next Button.

Manage Approval Processes For:

A listing of both active and inactive approval processes for **Invoices** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

- Use Jump Start Wizard
- Use Standard Setup Wizard

Active Approval Processes [Reorder](#)

Step 1 :- we have to select the Object. Select Invoice As shown above. To create new approval process we have two process

- Jump Start** : Involves few to create new Salesforce Approval Process.

- **Standard Setup Wizard** : It Involves all configuration options while creating new Salesforce Approval Process.

Step 2 :- Specifying Rule Criteria.

The screenshot shows the 'Step 2. Specify Entry Criteria' screen. At the top, it says 'Step 2 of 6'. Below the title bar, there are 'Previous', 'Next', and 'Cancel' buttons. A text block explains: 'If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.' The main section is titled 'Specify Entry Criteria' and contains the text 'Use this approval process if the following' followed by a dropdown menu showing 'criteria are met'. Below this is a table with three columns: 'Field', 'Operator', and 'Value'. The first row has 'Invoice: Amount' in the Field column, 'greater than' in the Operator column, and '10000' in the Value column. To the right of the Value column is an 'AND' button. Below the first row are three more rows, each starting with '--None--' in the Field column, '--None--' in the Operator column, and an empty Value field, followed by an 'AND' button. At the bottom left of the table area is a link 'Add Filter Logic...'. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons, with the 'Next' button highlighted by a red circle.

Field	Operator	Value	
Invoice: Amount	greater than	10000	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

In this Step we have to specify the rule criteria which are the record that are eligible for approval process. As per our requirement we have defined where invoice amount is greater than 10000 the record must be sent to approval process. We can also group multiple entry criteria.

Step 3:- Specifying Approver Field and Record Edibility Properties.

The screenshot shows the 'Step 3. Specify Approver Field and Record Editability Properties' screen. At the top, it says 'Step 3 of 6'. Below the title bar, there are 'Previous', 'Next', and 'Cancel' buttons. A text block explains: 'When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.' The main section is titled 'Select Field Used for Automated Approval Routing' and contains the text 'Next Automated Approver Determined By' followed by a dropdown menu showing 'Manager'. Below this is a link 'i' and a checkbox labeled 'Use Approver Field of Hospital Owner'. The next section is titled 'Record Editability Properties' and contains two radio button options: 'Administrators ONLY can edit records during the approval process.' (selected) and 'Administrators OR the currently assigned approver can edit records during the approval process.' At the bottom right are 'Previous', 'Next', and 'Cancel' buttons, with the 'Next' button highlighted by a red circle.

- It is about the approver. Select Manager as the approver and click on Next Button.

Step 4. Select Notification Templates

Step 4 of 6

PreviousNextCancel

Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process.
[Create a new email template](#)

Email Template

Approval Assignment Email TemplateCustom HTML template

PreviousNextCancel

Before creating approval process we have to create Email template. An email will be sent to the approver. Select the [email template](#) and click on Next button.

Step 5 : Selecting Fields that be displayed on Approver page layout.

Step 5. Select Fields to Display on Approval Page Layout

Step 5 of 6

PreviousNextCancel

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields

Bulk Invoice

Comment

Created By

Doctor Incharge

Hospital

Hospital Email

Hospital Name

Invoice ID

Invoice RegNo

Last Modified By

AddRemove

Selected Fields

Invoice Name

Amount

Final amount

Invoice date

Status

UpDown

Click here to view an example

Approval Page Fields

☒ Display approval history information in addition to the fields selected above.

Security Settings

☒ Allow approvers to access the approval page only from within the Salesforce application. (Recommended)

☐ Allow approvers to access the approval page from within the Salesforce application, or externally from a wireless-enabled mobile device.

PreviousNextCancel

In this step we have to select the fields from available fields to selected fields. Selected fields will be displayed on the approver [page layouts](#). Click on Next button.

Step 6 : Specify Initial Submitter.

Step 6. Specify Initial Submitters

Step 6 of 6

Previous

Save

Cancel

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

Initial Submitters

Submitter Type

Search: Creator

for:

Find

Available Submitters

Record Creator

Add

Remove

Allowed Submitters

Hospital Owner

Page Layout Settings

☒ Add the Submit for Approval button and Approval History related list to all Invoice page layouts

Submission Settings

☒ Allow submitters to recall approval requests

Previous

Save

Cancel

In this step we have to define who are eligible to submit the record for approver like Owner, group, Creator or User. Select the submitter type, select [page layout](#), Submission setting and click on Save button.

Active Approval Processes			Reorder
No approval processes available			
Inactive Approval Processes			
Action	Approval Process Name	Description	
Edit Del	Invoice Approval Process		

As shown above we have two sections Active Approval Processes and Inactive Approval Processes. The approval Process which we created is not activate so it is available in inactive approval processes. Click on Approval Process name.

Invoice: Invoice Approval Process

[« Back to Approval Process List](#)

Process Definition Detail

Edit

Clone

Delete

View Diagram

Process Name	Invoice Approval Process	Active	<input type="checkbox"/> i
Unique Name	Invoice_Approval_Process	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	Invoice: Amount GREATER THAN 10000		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	Custom HTML template		
Initial Submitters	Hospital Owner		
Created By	Prasanth Kumar, 6/1/2017 11:34 PM	Modified By	Prasanth Kumar, 6/1/2017 11:34 PM

Initial Submission Actions


Add Existing

Add New

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps [i](#)

New Approval Step

	You have not yet defined any approval steps
--	---

Final Approval Actions [i](#)

Add Existing

Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions [i](#)

Add Existing

Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

This gives the whole details about the approval process. What is the name, Entry criteria, Status, Email Template, Initial Submission actions and so on. Once the Initial Submission action is done the records get locked by default.

Conclusion.

In this [Salesforce tutorial](#), we have created Salesforce approval process successfully and also learned about what is Approval Process in Salesforce.com. In our upcoming Salesforce tutorial, we are going to learn about how to configure multiple steps and multiple approvers to the approval process.

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