

## **Session 9**

### **Approval Process**

Approval Process in Salesforce is an automated mechanism that we can set up to process the approval of records within an organization.

Approval process enables to specify which user is to approve the record. When working with Approval process in Salesforce requires some settings after the record is either, first submitted, approved, rejected or recalled for approval.

#### **Approval Process**

1. Approval Processes are triggered explicitly when we click on **Submit for Approval**.
2. Approval Processes consists of multiple steps.
3. Some attributes can not be modified in approval Processes.
4. Approval processes must be deactivated to delete.
5. Approval history can be tracked here.
6. If the record is set to “locked down” that record can not be changed.

We must carefully plan Approval processes step by step before creating approval process in Salesforce.

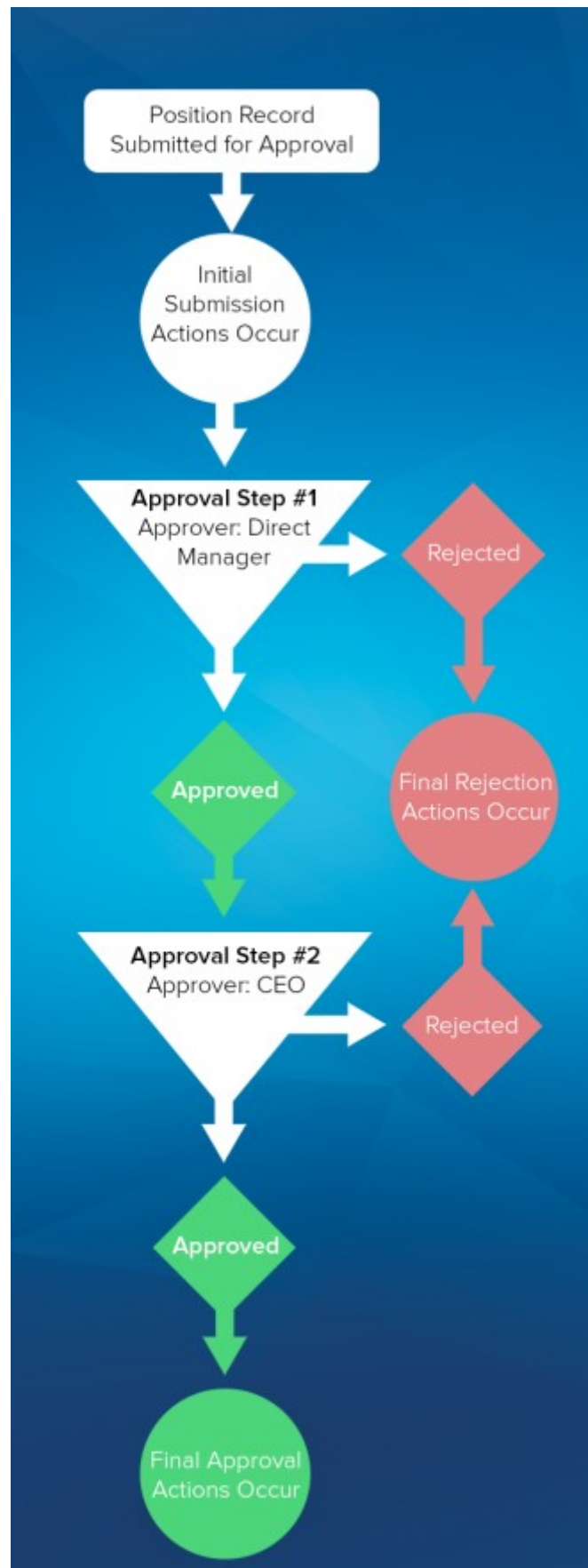
## **Approval Process Steps:**

1. Selecting Approval wizard
2. Enter name, Unique name and description.
3. Select Criteria for Entering Process.
4. Specify Approver Field and Record Editability.
5. Select Email Notification Template.
6. Configure Approval Request Page Selecting Approval wizard layout.
7. Specify Initial submitters.
8. Activate the approval process.

Above 8 steps must be done to configure Approver processes.

Now login to salesforce.com and follow the path.

**Setup=>Build=>Create=>Workflow & Approvals=>Approval Processes.**



Approval process steps and action

## Salesforce Approval process Example:

The screenshot shows the 'Step 1. Enter Name and Description' interface for creating a new approval process. The header bar is blue with 'Step 1. Enter Name and Description' on the left and 'Step 1 of 6' on the right. Below the header, there are 'Next' and 'Cancel' buttons. The main instruction reads: 'Enter a name and description for your new approval process.' Below this is a section titled 'Enter Name and Description' with a red exclamation mark icon and the text '= Required Information'. This section contains three fields: 'Process Name' with the value 'Example1', 'Unique Name' with the value 'Example1' and an information icon, and 'Description' which is an empty text area. At the bottom right of the form, there are 'Next' and 'Cancel' buttons.

- 1) Enter name, Unique name and Description(Optional).
- 2) Select criteria are met if you want to set a filter criteria that a record must meet to enter this approval process. For example, if only employees from headquarters should use this approval process to submit expense reports, enter the following filter criteria: “Current User: Office Location Equals Headquarters.”

Enter filter criteria for records that you want to be included in this approval process. Leave the filter blank if you want all records submitted to be included in the approval process.

Step 2. Specify Entry Criteria

Step 2 of 6

Previous

Next

Cancel

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.

Specify Entry Criteria

Use this approval process if the following criteria are met :

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

Previous

Next

Cancel

Select formula evaluates to true if you want a formula to determine what records enter the approval process.

Step 2. Specify Entry Criteria

Step 2 of 6

Previous

Next

Cancel

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.

Specify Entry Criteria

Use this approval process if the following formula evaluates to true :

Example: OwnerId <> LastModifiedById evaluates to true when the person who last modified the record is not the record owner. [More Examples...](#)

Insert Field

Insert Operator

Functions

-- All Function Categories --

ABS

AND

BEGINS

BLANKVALUE

BR

CASE

Insert Selected Function

Check Syntax

Previous

Next

Cancel

3) 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 pick list 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.

#### **4) Define initial submission actions**

New field update / email / task -> Conditions -> save.

#### **5) Define approval steps**

Manager step -> click on new approval step button -> provide the name -> all record should enter this step -> select approver manually and save.

1. Manager step -> click on new approval step button -> provide the name -> all record should enter this step -> select approver manually and save.

2. CEO step -> click on new approver step button -> provide the name -> enter criteria and save.

#### **6) Final approval steps**

New field update / Task / Email according to the field provide the condition and save .

#### **7) Final Rejection actions**

New field -> provide the conditions and save.

Once the salesforce approval process is activated no more steps can be added.

## Approval Limits

Salesforce limits the number of approval processes in your org, as well as the number of steps and actions in each approval process.

### Required Editions

Available in both salesforce classic and lightning Experience

Available in : Enterprise, Performance, Unlimited and Developer Editions

PER-ORG LIMIT	VALUE
Active approval processes	1,000
Total approval processes	2,000
Active approval processes per object	300
Total approval processes per object	500
Steps per approval process	30
Approvers per step	25
Initial submission actions per approval process <sup>2</sup>	40
Final approval actions per approval process <sup>2</sup>	40
Final rejection actions per approval process <sup>2</sup>	40
Recall actions per approval process <sup>2</sup>	40

<b>PER-ORG LIMIT</b>	<b>VALUE</b>
Maximum characters in approval request comments	4,000