

SALESFORCE DEVELOPER

PROJECT TITLE : WORKFORCE ADMINISTRATION SOLUTION

TEAM ID : NM2023TMID0250

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APPROVAL PROCESS

Use Case:

The Hiring Manager (HR) at TheSmartBridge wants to track the leave applications for each and every employee of the company. His requirement is the no leave application with more than 5 days of leave should come to him but automatically get submitted to the Employee Manager. If the leave application is more than 5 days then only his approval is needed.

As an Admin to TheSmartBridge you know what to do in order to achieve this requirement.

Prerequisites:

Create the **leave** object with the following fields.

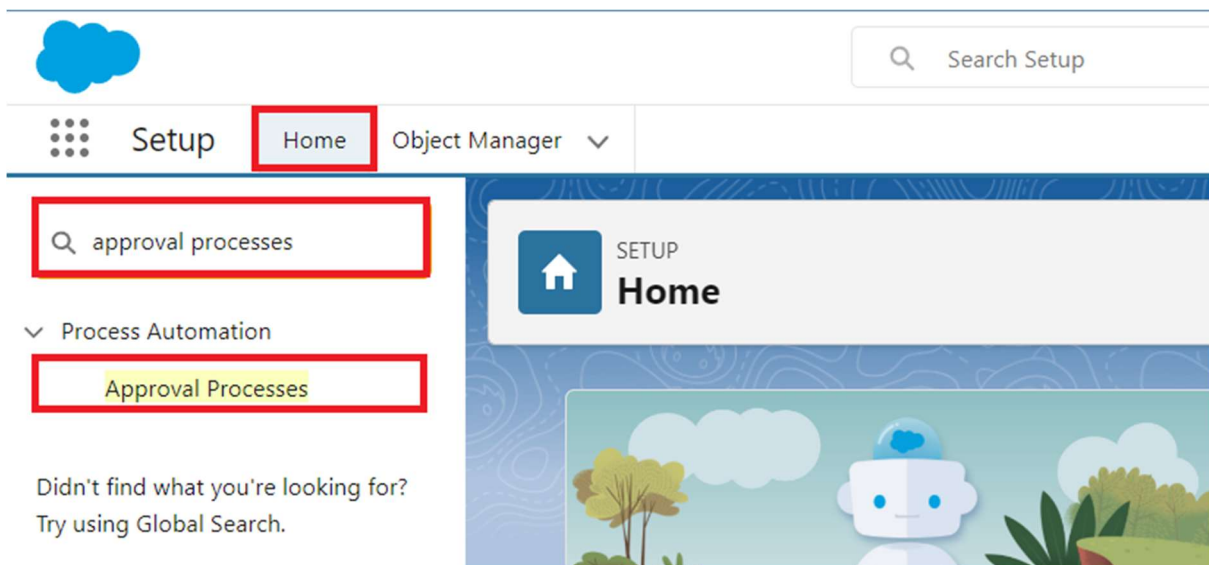
| Object | Fields | Datatype |
|--------|--|---|
| Leave | Employee Name No. of Days Subject | Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows |

| | | |
|--|-----------------------|---|
| | Description Status | <div> Submitted Approved Rejected </div> <p>Note: Make sure the Status field is read only for everyone. (Give read only permission in step 3 while creating the field)</p> |
|--|-----------------------|---|

Create the tab for the **leave** object.

Create An Approval Process For Leave Object

1. Go to Setup >>> type Approval Processes in quick find >>> click on Approval Processes.



2. In the Manage Approval Processes For list, select Leave.
3. Click Create New Approval Process and select Use Jump Start Wizard.

Manage Approval Processes For: Leave

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

Create New Approval Process ▾
Use Jump Start Wizard
 Use Standard Setup Wizard

4. Enter the following parameters

| Parameter | Value |
|--|---|
| Name | Leave Approval Request |
| Unique Name | Leave_Approval_Request(This automatically gets sent when you tab out of the Name field) |
| Approval Assignment | Leave blank |
| Email Template | |
| Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts | Leave this selected/checked |
| Use Approver Field of Leave Owner | Leave unselected/unchecked. |

| | |
|-----------------|---|
| Select Approver | select Automatically assign to approver(s) and for users select the name of the user with the Manager role. |
|-----------------|---|

Add a screenshot here

5. Click Save.
6. Click View Approval Process Detail Page.

Approval Process

Use Case:

The Hiring Manager (HR) at TheSmartBridge wants to track the leave applications for each and every employee of the company. His requirement is the no leave application with more than 5 days of leave should come to him but automatically get submitted to the Employee Manager. If the leave application is more than 5 days then only his approval is needed.

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Prerequisites:

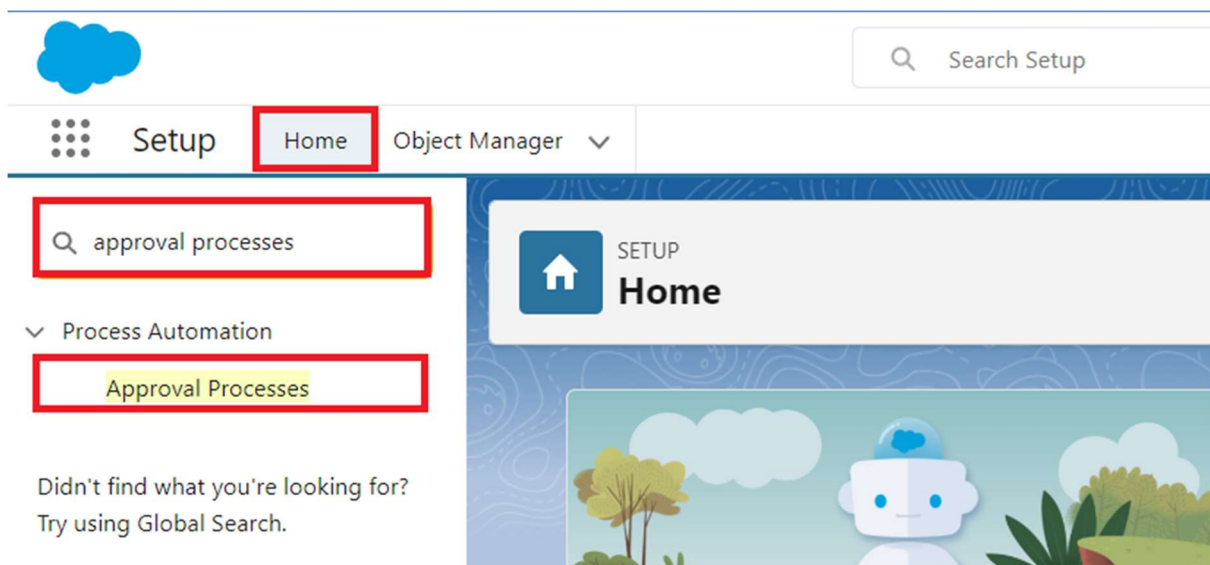
Create the **leave** object with the following fields.

| Object | Fields | Datatype |
|--------|---|---|
| Leave | Employee Name No. of Days Subject Description Status | Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows <div> Submitted Approved Rejected </div> <p>Note: Make sure the Status field is read only for everyone. (Give read only permission in step 3 while creating the field)</p> |

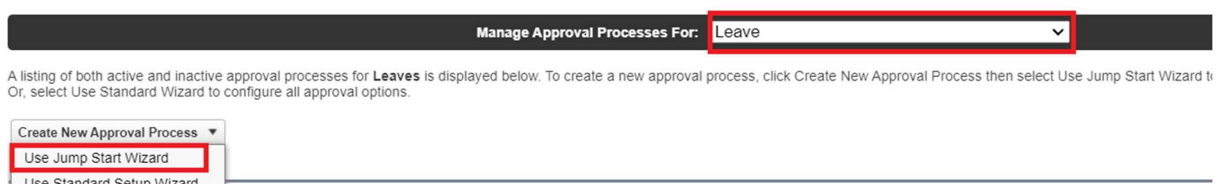
Create the tab for the **leave** object.

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2. In the Manage Approval Processes For list, select Leave.
3. Click Create New Approval Process and select Use Jump Start Wizard.



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| Parameter | Value |
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| Name | Leave Approval Request |
| Unique Name | Leave_Approval_Request(This automatically gets sent when you tab out of the Name field) |
| Approval Assignment | Leave blank |
| Email Template | |

| | |
|--|---|
| Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts | Leave this selected/checked |
| Use Approver Field of Leave Owner | Leave unselected/unchecked. |
| Select Approver | select Automatically assign to approver(s) and for users select the name of the user with the Manager role. |

Add a screenshot here

5. Click Save.
6. Click View Approval Process Detail Page.

Approval Steps

1. While you are still on Leave Approval Request detail page, Under approval steps click the new approval step.
2. Give the name as “Approval from HR” and click on next.

Enter Name and Description

Approval Process Name

hahaha

Name

Approval from HR

Unique Name

Approval_from_HR

Description

3. Under specify step criteria select “Enter this step if the following (Criteria are met)”,
Select field : “Leave: No. of Days”,
Operator : equals
Value : 5

Specify Step Criteria

☐ All records should enter this step.

☒ Enter this step if the following criteria are met.

| Field | Operator | Value | |
|--------------------|----------|-------|-----|
| Leave: No. of Days | equals | 5 | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |

[Add Filter Logic...](#)

[Previous](#) [Save](#) [Next](#) [Cancel](#)

4. Click next.
5. Under select approver : select Automatically assign to approver(s)
and for users select the name of the user with the HR role.

Select Approver

☐ Let the submitter choose the approver manually.

☐ Automatically assign to queue.

☒ Automatically assign to approver(s).

| User | |
|-------------------|--|
| Niklaus Mikaelson | |

[Add Row](#) [Remove Row](#)

When multiple approvers are selected:

☒ Approve or reject based on the FIRST response.

☐ Require UNANIMOUS approval from all selected approvers.

☐ The approver's delegate may also approve this request.

Reject Behavior

What should happen if the approver rejects this request?

☒ Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)

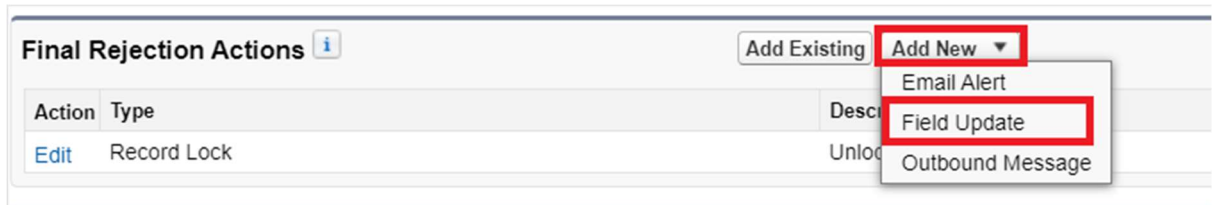
☐ Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)

[Previous](#) [Save](#) [Cancel](#)

6. Click on Save.
7. No, I'll do this later. Take me to the approval process detail page to review what I've just created and click Go.

Final Rejection Action

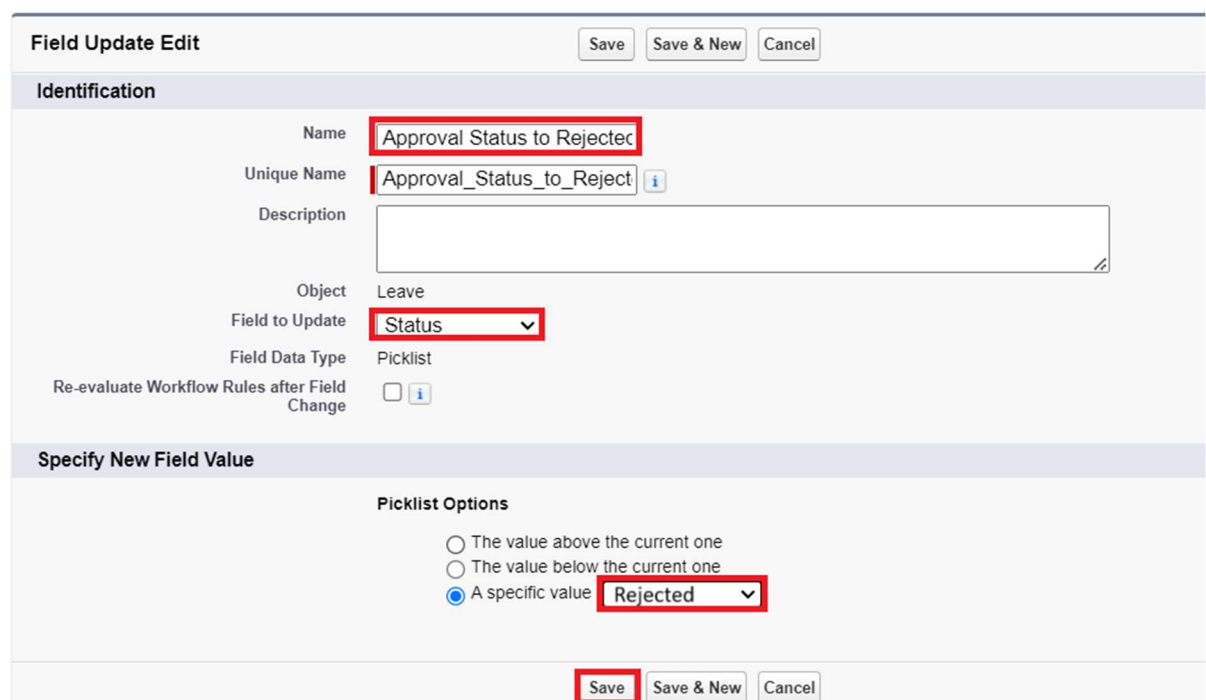
1. Under initial submission action click on add new and then select field update.



The screenshot shows a table titled "Final Rejection Actions" with columns "Action" and "Type". A row is visible with "Edit" as the action and "Record Lock" as the type. To the right of the table, there are two buttons: "Add Existing" and "Add New". The "Add New" button has a dropdown menu open, showing three options: "Email Alert", "Field Update", and "Outbound Message". The "Field Update" option is highlighted with a red box.

2. Give name as "Approval Status to Rejected". Select Status for the field to update. Under specify new field value select "A specific value" and select Rejected and click Save.

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the new field value. Fields are shown only for the type that you select.



The screenshot shows the "Field Update Edit" form. It has three main sections: "Identification", "Specify New Field Value", and "Picklist Options".

- Identification:** Contains fields for "Name" (set to "Approval Status to Rejected"), "Unique Name" (set to "Approval_Status_to_Reject"), "Description" (empty), "Object" (set to "Leave"), "Field to Update" (set to "Status"), "Field Data Type" (set to "Picklist"), and "Re-evaluate Workflow Rules after Field Change" (unchecked).
- Specify New Field Value:** Contains a section for "Picklist Options" with three radio buttons: "The value above the current one", "The value below the current one", and "A specific value". The "A specific value" option is selected.
- Picklist Options:** Below the selected radio button, there is a dropdown menu showing "Rejected".

At the bottom of the form, there are three buttons: "Save", "Save & New", and "Cancel". The "Save" button is highlighted with a red box.