

# Salesforce Administration

## Workflow Approvals

# Objectives

- ▶ At the end of this session participants will be able to:
  - Create Workflow Approval process
  - Create Workflow Approval checklist
  - Create an Approval workflow
  - Define Approval Action
  - Email Approval Response

# Approval Process

- ▶ What is Approval Process?
  - The Approval process specifies.
    - Steps necessary to approve a record
    - Approvers at different levels
    - Actions to be performed on Approval or Rejection of the request

# Approval Process Checklist

- ▶ Before creating an Approval Process, a User should
  - Prepare an approval request email
  - Determine the approval request sender
  - Determine the assigned approver
  - Determine the delegated approver
  - Decide if a filter is needed for the approval process
  - Decide initial action on submission of approval
  - Decide on whether the record should be allowed for edit once it is submitted for approval
  - Decide on levels of approval
  - Decide on actions on approval or rejection
  - Decide if records can be auto approve or auto rejected
  - Decide if user can approve requests from a wireless device

# Approval Process Capabilities

- ▶ User can
  - Define formula based Approval process
  - Define skipping of some approval steps based on a formula or filter criteria
  - Define Workflow Approval retractions
  - Define Approval routing
  - Route approval based on object field

**App Setup**

- Customize
- Create**
  - Apps
  - Custom Labels
  - Objects
  - Packages
  - Report Types
  - Tabs
  - Workflow & Approvals**
    - Workflow Rules
    - Approval Processes**
    - Flows

**Manage Approval Processes For:** Opportunity

A listing of both active and inactive approval processes for **Opportunities** is displayed below. To create a new approval process, click **Create New Approval Process**. To edit an existing approval process, click **Edit**. To deactivate an approval process, click **Deactivate**. To set up your approval process in a Standard Wizard to configure all approval options.

**Create New Approval Process**

**Active Approval Processes** [Reorder](#)

Action	Process Order	Approval Process Name	Description
<a href="#">Edit</a>   <a href="#">Deactivate</a>	1	<a href="#">Vivek Std Setup Wizard Opty Approval 2</a>	Vivek Std Setup Wizard Opty Approval 2 is able to submit the approval and only 'Proposal / Price Quotation' stage a

# Salesforce Administration

## Creating Approvals Process

# Creating Approval Process

- ▶ Approval Process can be created using
  - Jump Start Wizard OR

The screenshot shows the 'Manage Approval Processes' interface for 'Opportunity'. The title bar reads 'Manage Approval Processes For Opportunity'. Below this, a text block explains that a listing of both active and inactive approval processes is displayed, and provides instructions on how to create a new process using either the 'Jump Start Wizard' or the 'Standard Wizard'. A dropdown menu on the left, titled 'Create New Approval Process', is open, showing three options: 'Create New Approval Process', 'Use Jump Start Wizard', and 'Use Standard Setup Wizard'. The 'Use Jump Start Wizard' option is highlighted with a red circle. Below the dropdown, there is a 'Reorder' button and a table listing active approval processes. The table has four columns: 'Action', 'Process Order', 'Approval Process Name', and 'Description'. Two processes are listed: 'Vivek Std Setup Wizard Opty Approval 2' and 'Amar2 Jumpstart opp approval'. The first process is described as being for 'only crum users' and a 20% discount. The second process is described as a 'Jumpstart opp approval'.

Manage Approval Processes For **Opportunity**

A listing of both active and inactive approval processes for **Opportunities** 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

Reorder

Action	Process Order	Approval Process Name	Description
Edit   Deactivate	1	<u>Vivek Std Setup Wizard Opty Approval 2</u>	Vivek Std Setup Wizard Opty Approval 2 - only crum users will be able to submit the approval and only those opportunity which are in 'Proposal / Price Quotation' stage and Amount greater than \$20000 will be approved for discount of 20%.
Edit   Deactivate	2	<u>Amar2 Jumpstart opp approval</u>	

# Creating Approval Process

- Jump Start Wizard
  - Creates a one-step approval process
  - A quick way to create a single level approval process
  - Used to setup approval process in few short steps.
- Standard wizard
  - Helps in designing the approval process in detailed step by step process
  - Can be used for complex approval process setup



# Creating Approval Process

## ► Jump Start Wizard

- Select Setup → Create → Workflow & Approvals → Approval Processes

The screenshot shows the Salesforce 'Approval Processes' setup page for 'Opportunity'. On the left is a sidebar with navigation options: 'Personal Setup' (My Personal Information, Email, Import, Desktop Integration, My Chatter Settings), 'App Setup' (Customize, Create), and 'Workflow & Approvals' (Workflow Rules, Approval Processes, Flows, Tasks, Email Alerts). The 'Create' option under 'App Setup' and the 'Approval Processes' option under 'Workflow & Approvals' are highlighted with red boxes. The main content area is titled 'Approval Processes Opportunity' and includes a help link 'Help for this Page'. A yellow information box contains a list of 7 steps for creating an approval process, with step 5 'Create an approval process using either the Jump Start or Standard Wizard' highlighted by a red box. Below this is a 'Manage Approval Processes For:' dropdown menu set to 'Opportunity'. A text block explains that a listing of both active and inactive approval processes for 'Opportunities' is displayed below, and provides instructions on how to create a new approval process using either the 'Create New Approval Process' button or the 'Jump Start Wizard'. At the bottom, there is a section for 'Active Approval Processes' with a 'Reorder' button and a message stating 'No approval processes available'.

**Personal Setup**

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

**App Setup**

- Customize
- Create**
  - Apps
  - Custom Labels
  - Interaction Log Layouts
  - Objects
  - Packages
  - Report Types**
  - Tabs

**Workflow & Approvals**

- Workflow Rules
- Approval Processes**
- Flows
- Tasks
- Email Alerts

**Approval Processes Opportunity** [Help for this Page](#)

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. [Read the help topic](#)
2. [View the checklist](#)
3. [Create a custom user hierarchical relationship field](#)
4. [Create email templates](#)
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

**Manage Approval Processes For:** Opportunity

A listing of both active and inactive approval processes for **Opportunities** 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**

**Active Approval Processes** [Reorder](#)

No approval processes available

# Creating Approval Process

## ► Jump Start Wizard

- Select the Object for New Approval Process.

**Approval Processes** Help for this Page ?

## Opportunity

**i** Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

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**Manage Approval Processes For** Opportunity ▼

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

**Create New Approval Process** ▼

**Active Approval Processes** Reorder

No approval processes available

Internet

# Creating Approval Process

## ► Jump Start Wizard

- Select Create New Approval Process → Use Jump Start Wizard

The screenshot shows the 'Approval Processes' page for 'Opportunity' in Salesforce. At the top, there's a header 'Approval Processes' and 'Opportunity' with a 'Help for this Page' link. Below this is a yellow information box with an 'i' icon, stating: 'Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.' This box contains a 7-step list: 1. Read the help topic, 2. View the checklist, 3. Create a custom user hierarchical relationship field, 4. Create email templates, 5. Create an approval process using either the Jump Start or Standard Wizard, 6. Add Approval History Related List to all page layouts, and 7. Activate the process to deploy to your users. Below the list is a dark bar with the text 'Manage Approval Processes For: Opportunity' and a dropdown arrow. A paragraph follows: 'A listing of both active and inactive approval processes for **Opportunities** 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.' Below this is a 'Create New Approval Process' dropdown menu. The 'Use Jump Start Wizard' option is highlighted with a red rectangle. Below the menu is a 'Reorder' button. At the bottom, a message states 'No approval processes available'. The footer of the page says 'Prepared by Dipti Anjarlekar'.

Approval Processes  
Opportunity [Help for this Page](#)

**i** Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. [Read the help topic](#)
2. [View the checklist](#)
3. [Create a custom user hierarchical relationship field](#)
4. [Create email templates](#)
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
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Manage Approval Processes For: Opportunity ▼

A listing of both active and inactive approval processes for **Opportunities** 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](#)

Reorder

No approval processes available

Prepared by Dipti Anjarlekar

# Creating Approval Process

## ► Jump Start Wizard : Fill in all Required Information

The Jump Start wizard creates a one-step approval process for you in just a few minutes.

Enter a name for your process in the box below and then select an email template to notify the approver (optional).

Name

Unique Name  [i](#)

Use Approver Field of Opportunity Owner ☐

Approval Assignment Email Template  [i](#)

☒ [i](#) Add the Submit for Approval button and Approval History related list to all Opportunity page layouts

### Specify Entry Criteria

Use this approval process if the following  :

Field	Operator	Value	
<input type="text" value="Opportunity: Amount"/>	<input type="text" value="greater than"/>	<input type="text" value="2000"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	

[Add Filter Logic...](#)

### Select Approver

# Creating Approval Process

## ► Jump Start Wizard :

- Check additional activities and click 'View Approval Process Detail Page'

- 1** Create additional steps if a record requires more than one level of approval.  
Example:
  - Discounts of more than 15% require an additional manager's approval
- 2** Add Initial Submission workflow actions. These actions will take place when a record is submitted for approval.  
Example:
  - A Field Update action that changes the value of the Status field to "Pending"
- 3** Add Final Approval workflow actions. These actions will take place when a record has received all necessary approvals.  
Examples:
  - A Field Update action that changes the value of the Status field to "Approved"
  - An Email Alert action that notifies the owner their record has been approved
- 4** Add Final Rejection workflow actions. These actions will take place when a record has been completely rejected by an approver.  
Examples:
  - A Field Update action that changes the value of the Status field to "Rejected"
  - An Email Alert action that notifies the owner their record has been rejected
- 5** Add Recall workflow actions. These actions will take place when a submitted approval request is recalled.  
Examples:
  - A Field Update action that changes the value of the Status field from "In Progress" to "Not Submitted"

# Creating Approval Process

## ► Jump Start Wizard :

- Approval Process Detail Page appears

Approval Processes

Opportunity: Opportunity Amount greater than 2000

[« Back to Approval Process List](#)

Process Definition Detail

Edit ▼

Clone

Delete

Activate

View Diagram

Process Name	Opportunity Amount greater than 2000	Active	<input type="checkbox"/>
Unique Name	Opportunity_Amount_greater_than_2000	Next Automated Approver Determined By	
Description			
Entry Criteria	Opportunity: Amount GREATER THAN 2000		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	<a href="#">Marketing: Product Inquiry Response</a>		
Initial Submitters	Opportunity Owner		
Created By	<a href="#">DIPTI ANJARLEKAR</a> , 6/2/2019 3:05 AM	Modified By	<a href="#">DIPTI ANJARLEKAR</a> , 6/2/2019 3:05 AM

# Creating Approval Process

## ► Jump Start Wizard :

- Scroll down to check & configure actions at different levels

**Initial Submission Actions** [i](#) [Add Existing](#) [Add New](#) ▼

Action	Type	Description
	Record Lock	Lock the record from being edited

**Approval Steps** [i](#) [New Approval Step](#)

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
<a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a>	1	Step 1			Manually Chosen	Final Rejection

**Final Approval Actions** [i](#) [Add Existing](#) [Add New](#) ▼

Action	Type	Description
<a href="#">Edit</a>	Record Lock	Lock the record from being edited

**Final Rejection Actions** [i](#) [Add Existing](#) [Add New](#) ▼

Action	Type	Description
<a href="#">Edit</a>	Record Lock	Unlock the record for editing

**Recall Actions** [i](#) [Add Existing](#) [Add New](#) ▼

Action	Type	Description
	Record Lock	Unlock the record for editing

# Creating Approval Process


- ▶ Standard Setup Wizard :
  - Select Create New Approval Process → Use Standard Setup Wizard option


New Approval Process  
Opportunities

**Step 1. Enter Name and Description**

Enter a name and description for your new approval process.

**Enter Name and Description**

Process Name	<input type="text" value="Recruiting App Multilevel Approval"/>
Unique Name	<input type="text" value="Recruiting_App_Multilevel_Approval"/> 
Description	<input type="text" value="Recruiting App Multilevel Approval, the Standard setup wizard"/>





# Creating Approval Process

## ▶ Standard Setup Wizard :

- Specify the entry criteria based on which only the records which meet those criteria's will enter this approval process.
- If required, add Filter logic to the criteria's.

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  :

Field	Operator	Value	
<input type="text" value="Account: Account Name"/>	<input type="text" value="equals"/>	<input type="text" value="TechMahindra"/>	AND
<input type="text" value="Opportunity: Close Date"/>	<input type="text" value="less than"/>	<input type="text" value="31/12/2011"/>	AND
<input type="text" value="Opportunity: Expected Revenue"/>	<input type="text" value="greater than"/>	<input type="text" value="500000"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	

Add Filter Logic...

# Creating Approval Process

- ▶ Standard Setup Wizard :
  - Select who would get the record for approval
  - Define who can edit records during approval process.

Step 3. Specify Approver Field and Record Editability Properties

Step 3 of 6

Previous

Next

Cancel

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.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By 

Manager

Use Approver Field of Opportunity Owner ☒

Record Editability Properties

☒ Administrators **ONLY** can edit records during the approval process.

☐ Administrators **OR** the currently assigned approver can edit records during the approval process.

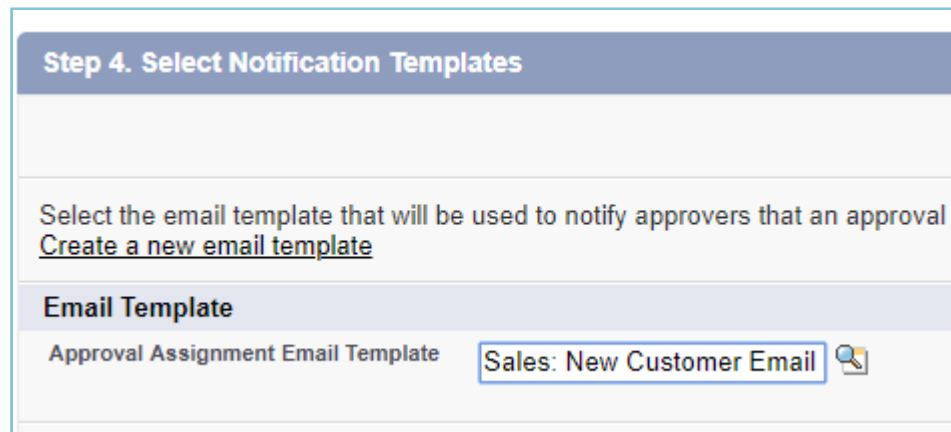
Previous

Next


Cancel

# Creating Approval Process

- ▶ Standard Setup Wizard :
  - Select a Email Template from the existing Email Templates or
  - Create a new template by clicking on 'Create a new email template' link



The screenshot shows a web interface for 'Step 4. Select Notification Templates'. It includes a header bar with the step title, a descriptive text area, a link to 'Create a new email template', and a table for selecting an email template.

Step 4. Select Notification Templates	
Select the email template that will be used to notify approvers that an approval r <a href="#">Create a new email template</a>	
Email Template	
Approval Assignment Email Template	<input type="text" value="Sales: New Customer Email"/> 

# Creating Approval Process

- ▶ Standard Setup Wizard :
  - Select fields to be displayed on Approval Page Layout

**Step 5. Select Fields to Display on Approval Page Layout**

The approval page is where an approver will actually approve or reject a request. Using the options this page.

**Approval Page Fields**

Available Fields		Selected Fields	
AMAR 2 ROLLUP CAMPEXP.REVENUE	<div>Add</div> <div>Remove</div>	Opportunity Name	<div>Up</div> <div>Down</div>
Amar 2 Rollup plus Field		Opportunity Owner	
Amar2 Rollupsum Field		Probability (%)	
Amar2 Rollup summary oppor		Next Step	
Amar AutoNumber		Expected Revenue	
Amar Commission		Account Name	
Amar Discount Percentage			
Amar Amount A Discount			
Amount			
Close Date			
Created By			
Delivery/Installation Status			
Description			
Forecast Category			

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

# Creating Approval Process

## ▶ Standard Setup Wizard :

- Specify which users are allowed to submit request for proposal.
- Select whether Submitter can recall approval requests.

The screenshot shows a software window titled "Step 6. Specify Initial Submitters" with a progress indicator "Step 6 of 6". At the top right are buttons for "Previous", "Save", and "Cancel". Below the title bar, a text box explains: "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." The main section is titled "Initial Submitters" and contains a "Submitter Type" label, a "Search:" dropdown menu, a "for:" text field, and a "Find" button. The dropdown menu is open, showing a list of options: "Owner", "Creator", "Customer Portal User", "Owner", "Portal Role", "Portal Role and Subordinates", "Public Groups", "Role" (highlighted), "Role and Internal Subordinates", "Role and Subordinates", and "User". Below the dropdown is a "Remove" button. To the right of the dropdown is a box labeled "Submitters" containing the text "Owner". At the bottom of the window is a "Submission Settings" section with a checkbox labeled "Allow submitters to recall approval requests".

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: Owner for:  Find

Available Submitters

- Owner
- Creator
- Customer Portal User
- Owner
- Portal Role
- Portal Role and Subordinates
- Public Groups
- Role**
- Role and Internal Subordinates
- Role and Subordinates
- User

Remove

Submitters

Owner

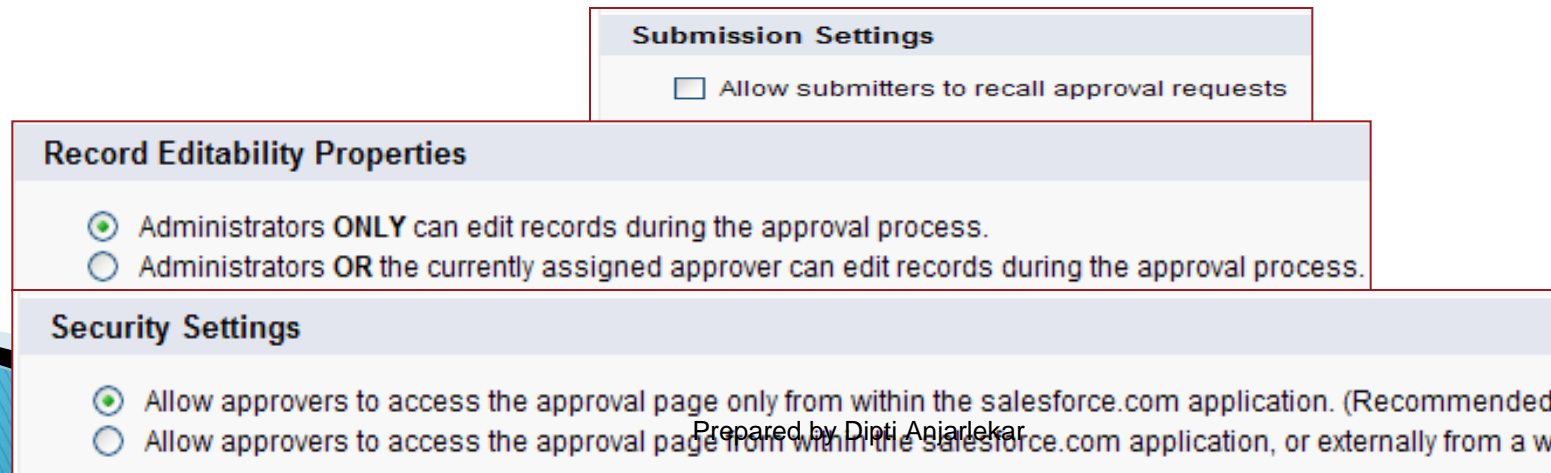
**Submission Settings**

☐ Allow submitters to recall approval requests

# Creating Approval Process

## ▶ Parallel Approval Routing

- Approval requests can be sent to multiple approvers
- Approval from all or approval from one can be configured
- Multiple Approvals can be configured from any combination of users
- 25 parallel approvals can be configured



The image shows a screenshot of the Salesforce configuration interface for an approval process. It features three distinct sections: 'Submission Settings', 'Record Editability Properties', and 'Security Settings'. Each section contains specific configuration options with radio buttons and checkboxes. The 'Record Editability Properties' section is highlighted with a red border. The 'Security Settings' section is partially visible at the bottom.

**Submission Settings**

☐ Allow submitters to recall approval requests

**Record Editability Properties**

☒ Administrators **ONLY** can edit records during the approval process.

☐ Administrators **OR** the currently assigned approver can edit records during the approval process.

**Security Settings**

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

☐ Allow approvers to access the approval page from within the salesforce.com application, or externally from a w

Prepared by Dinti Anjarlekar

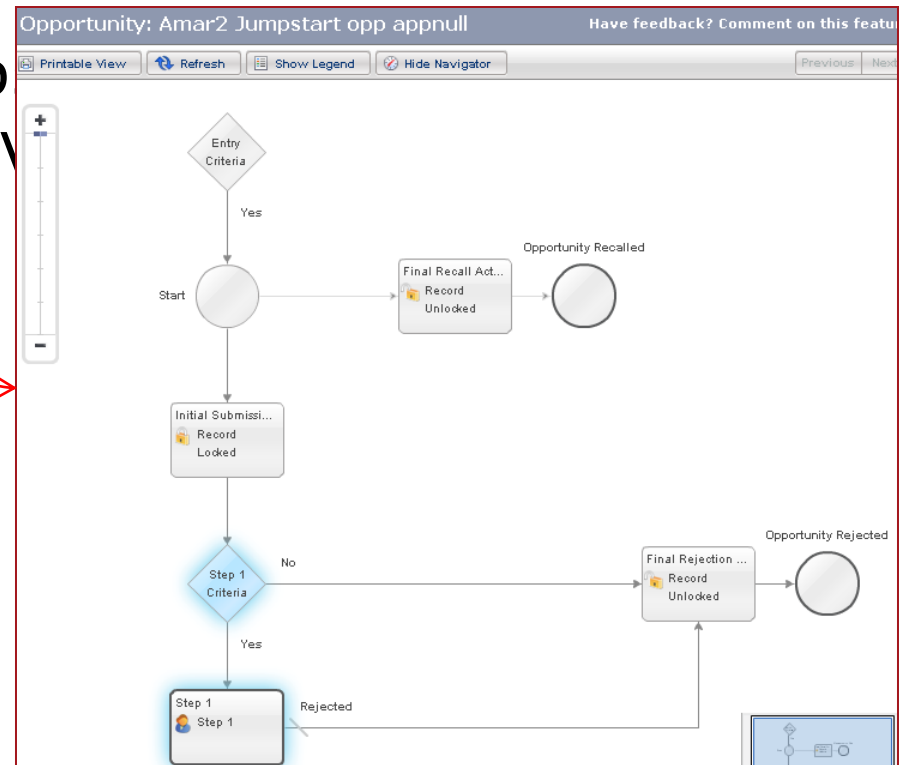
# Creating Approval Process

## ► Process Visualizer

- This Provides a visual representation of the full approval process
- Allows expanding step

Process Definition Detail	
Process Name	Amar2 Jumpstart opp approval
Unique Name	Amar2_Jumpstart_opp_approval
Active	Next Automated Approver Determined

Buttons: Edit, Clone, Deactivate, **View Diagram**





# Salesforce Administration

## Creating Approval Step



# Creating Approval Step

- ▶ Standard Setup Wizard :
  - After creating an approval process, you cannot activate this process until you define at least one approval step.
  - Create an approval step now.

Enter Name and Description	
Approval Process Name	TechM SS Approval Process
Name	<input type="text" value="First Approval Step"/>
Unique Name	<input type="text" value="First_Approval_Step"/>
Description	<div>This is first approval step in TechM SS Approval process</div>
Step Number	<input type="text" value="1"/>

# Creating Approval Step

## ► Standard Setup Wizard :

- Specify criteria for records to enter this step

Step 2. Specify Step Criteria

Step 2 of 3

Previous

Next

Cancel

Specify whether a record must meet certain criteria before entering this approval step. If these criteria are not met, the approval process can skip to the next step, if one exists. [Learn more](#)

### Specify Step Criteria

☐ All records should enter this step.

☒ Enter this step if the following  , else  :

Field	Operator	Value	
<input type="text" value="Opportunity: Lead Source"/>	<input type="text" value="equals"/>	<input type="text" value="Partner Referral"/>	 AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	AND

# Creating Approval Step

## ▶ Standard Setup Wizard :

- Select who should act as an Approver and save the record.
- User may specify workflow actions ( Task, Email Alert, Field Update or Outbound Message) to occur upon approval or rejection of this step.

### Step 3. Select Assigned Approver

Specify the user who should approve records that enter this step. Optionally, choose allowed to approve these requests.

#### Select Approver

- ☐ Let the submitter choose the approver manually.
- ☒ Automatically assign using the user field selected earlier. **(Manager)**
- ☐ Automatically assign to approver(s).

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

# Summary

- ▶ This module showed you how to
  - Create Workflow Approval process
  - Create Workflow Approval checklist
  - Create an Approval workflow
  - Define Approval Action
  - Define Email Approval Response

