What is Approval Process in Salesforce?

The Approval Process is an automated process that an organization uses to approve records in Salesforce. For example,  there are fields of priority and salary, if you wish to set a record where whenever the salary of an employee is greater than 1,00,000 then the approval process should run.

This will trigger the manager and approval the priority of that record should be set to high. So, Users can take advantage of such an approval process in Salesforce whenever needed.

Records submitted for approval are approved by the user(s) in the organization. These users are called Approvers. A single Approval process is bound to a single object because when a rule is defined, this object influences the fields that will be available to set the criteria.

An approval process consists of finalizing the basic properties of the approval process (as shown in the below image), approval steps, and actions to be executed.

A diagram of steps with blue squares

Description automatically generated

There are 2 options to set the criteria:

1. As a condition (Criteria are met).
2. As a formula which evaluates to true.

They can be left blank if all the records that are submitted for approval should enter the approval process.

Approval Process Steps in Salesforce

The approval process steps in Salesforce consist of one or more steps. Every approval step contains its criteria and Approvers. Approval Steps are given step numbers to identify the hierarchy in which the approval steps should be executed.

Every step consists of a criterion that qualifies whether the record needs to get into this step for approval or not. If the record does not fulfill the criteria for any step except the first step then the record gets approved and executes Final Approval actions after it.

Who Can Be the Approvers in the Approval Process?

The following can be the approvers in any approval process in Salesforce

1. Manager Field of user record or any other hierarchical field.
2. Submitters can also choose manually the approver of that step.
3. Records can automatically be assigned to a queue for approval.
4. Or we can set a particular user(s) or a queue for a particular approval step. In this option, 2 options decide how the approver(s) will decide whether the record is approved or not.
   1. Approve or reject based on the FIRST response. If any of the approvers approve the record it is considered to be approved.
   2. Require UNANIMOUS approval from all selected approvers. If any of the approvers rejects the record it is considered to be rejected.

Delegated approvers can also approve the record if they are allowed to approve explicitly in the approval step definition. Approvers can also reassign the approval request to another user.

Every approval step contains its own approval and rejection actions. These actions can be any amongst Email Alerts, Tasks, Field Updates, and Outbound messages. To activate an approval process, there should be at least one approval step.

We can choose whether the record should get approved or rejected if it does not fulfill the criteria. It can also be determined whether the process should go back to the previous approval step or final rejection actions should be executed in case of rejection at any approval step (except step number 1)

What are the Approval Process Steps in Salesforce?

Salesforce Approval Processes guide records through a defined series of steps for review and authorization. Each step involves an “approver” who reviews and takes action on the record.

A screenshot of a computer

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Here’s a breakdown of the typical steps involved:

1. Initiation

A record triggers the approval process based on predefined criteria (e.g., exceeding a certain amount, or meeting specific field values). The submitter enters relevant information and submits the record for approval.

2. Routing

The system routes the record to the first approver based on the defined criteria (e.g., by role, department, or hierarchy). The approver receives a notification with details of the record and the required action.

3. Review and Action

The approver reviews the record and its details.

They can then:

* Approve**–** Move the record to the next step or mark it as approved.
* Reject**–** Send the record back to the submitter with feedback and reasons for rejection.
* Request Changes – Send the record back to the submitter with specific changes requested.

4. Iterations

If changes are requested, the submitter makes the necessary modifications and resubmits the record. The revised record follows the same routing and review process until approval is granted.

5. Finalization

Once all required approvals are granted, the record is finalized and the corresponding action takes place (e.g., discount applied, budget approved, expense reimbursed). The submitter and relevant stakeholders receive notification of the final decision.

Actions in Salesforce Approval Process

There are 4 actions present except the approval steps which complete an approval process.

1. Initial Submission Actions

Initial submission actions are the actions that occur when a user first submits a record for approval. By default, an action to lock the record runs automatically on initial submission. Initial submission actions can include any approval actions such as email alerts, field updates, tasks, or outbound messages.

2. Final Approval Actions

Final Approval actions are the actions that occur when a record is approved from all the approval steps. It also locks or unlocks the record, as specified. It can include any approval actions such as email alerts, field updates, tasks, or outbound messages.

3. Final Rejection Actions

Final Rejection actions are the actions that occur when a record is rejected from any of the approval steps. It also locks or unlocks the record, as specified. It can include any approval actions such as email alerts, field updates, tasks, or outbound messages.

4. Recall Actions

Recall actions are the actions that occur when a record is recalled after submission for approval. It can include approval actions such as email alerts, field updates, tasks, or outbound messages.

A screenshot of a computer

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Things to keep in mind about Approval Process in Salesforce

1. Automated Approval routing routes the approval request automatically to the user specified in Manager Field or any hierarchical relationship field in the submitter’s user record.
2. If the “Use Approver field of [Object] owner” is checked then in the Approval steps the Manager Field or any hierarchical field whichever may be selected will be of the record owner instead of the submitter.
3. Records when submitted for approval automatically get locked which means they cannot be edited. However, administrators can edit the records during an approval process and also when defining the approval process administrators can select whether the approver is allowed to edit the record or not. We can also assign a notification email template that will send an email notification to approvers whenever a record is submitted for approval.
4. Similar to Action Layouts in Actions, approval processes also have Approval Page Layouts in which fields that will be visible to the approver are specified. Approval History information can be displayed as a related list on a record. Users who can submit the records for approval are called submitters. We can specify the submitters in the approval process definition.
5. If we do not select the Manager Field or any hierarchical relationship field of user record at the time of approval process definition then the automated approval routing for any approval step in this process will not be enabled.
6. The standard Name field and Owner field cannot be removed from Approval Page layouts.
7. Initial submission default actions cannot be edited but final approval & rejection default actions can be edited.
8. Once an approval process is activated, no more steps can be added to it, so, then the only option is to clone the approval process.