

Developing and deploying Approvals

Week 10

School of Software

Faculty of Engineering and Information Technology

University of Technology Sydney



SCHOOL OF SOFTWARE

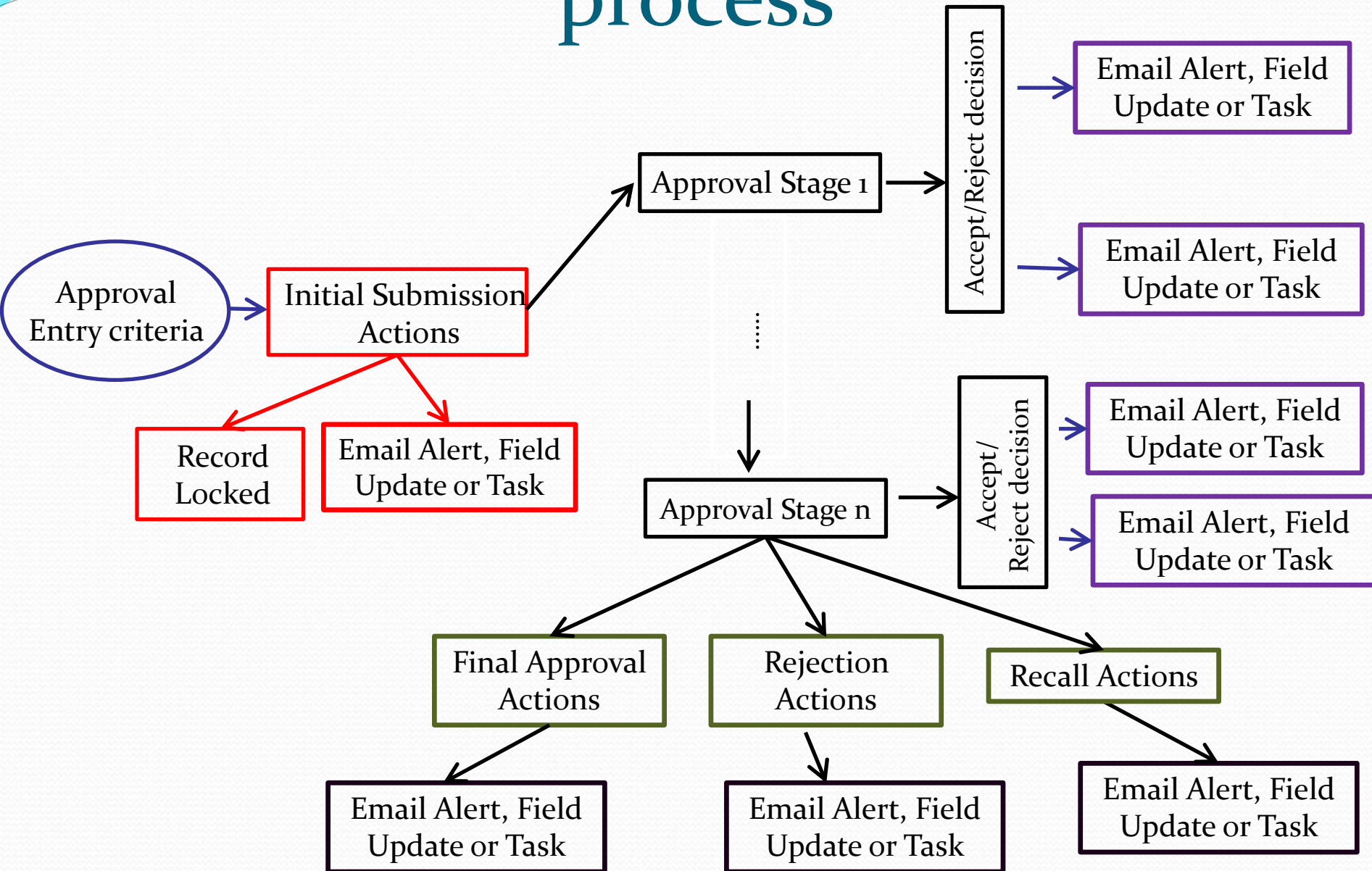
Learning Objectives

- Approvals
- Various elements in an approval process
- Implementing an approval process
- Conclusion

What are approvals?

- An inbuilt Force.com construct for automating approval processes:
 - Channel records to different persons (as required);
 - Comprised of one-step or multiple steps;
 - Based on a single either custom or standard object.

Typical structure of an approval process



Structure of an approval process

- An approval process has the following “*elements*”:
 - Approval entry criteria
 - Specify the criteria under which an approval process should be invoked (Example: Discount ≥ 0 etc..)
 - Initial Submission Actions
 - Specify who should be able to submit a record for approval;
 - What information relevant to the record should be presented to the approver for approval;
 - Edit ability of a record whilst in the approval process etc....

Structure of an approval process

- Approval Stages
 - An approval process can be either single-staged or have multiple stages
 - Maximum number of approval stages allowed is 30);
 - Each approval stage can have actions associated in **two** categories - Acceptance actions and Rejection Actions
- Final Approval Actions
 - Final set of actions to take when an approval request is accepted
- Rejection Actions
 - Set of actions to take when an approval request is declined
- Recall Actions
 - What should be the actions carried out to recall a record?

Creating an approval process – Preliminary Steps

- **Step 1:** Specify the object on which approval process is to be created
 - Go to Setup → Build → Create → Workflows and Approvals → Approval Processes
- **Step 2:** Select “Create New Approval Process”
 - Select the option “Use Jump Start Wizard” for creating a simple one-step approval process;
 - Select the option “Use Standard Setup Wizard” for creating a multi-step approval process

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 or Use Standard Setup Wizard.

Create New Approval Process ▼

- Use Jump Start Wizard
- Use Standard Setup Wizard

Active Approval Processes

Reorder

Step 1: Select the object on which the approval process is to be defined

Step 2: Select “Create New Approval Process”

Creating an approval process – Preliminary Steps

- **Step 3**: Specify a name and description for the approval process

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="Discount Process Automation for ABC"/>
Unique Name	<input type="text" value="Discount_Process_Automation_for_ABC"/> i
Description	<div>This approval process automates the entire discount process within ABC</div>

Figure: Entering the name and description of the approval process
– Configuring an approval

Approval process entry criteria

- **Step 4:** Entry criteria specifies when a given record should be able to enter the approval process
 - The entry criteria could be specified as a formula or using object fields

Step 2. Specify Entry Criteria

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees.

Specify Entry Criteria

Use this approval process if the following :

Example: `OwnerId <> LastModifiedById` evaluates to true when the person who last modified the record is not the record owner.

`Discount_Percentage__c > 0`

Functions

- All Function Category
- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

Step 2. Specify Entry Criteria

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees.

Specify Entry Criteria

Use this approval process if the following :

Field	Operator	Value	
<input type="text" value="Opportunity: Discount Percentage"/>	<input type="text" value="greater or equal"/>	<input type="text" value="0"/>	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...](#)

Specifying entry criteria using a object fields

Specifying entry criteria using a formula

Figure: Entry criteria – Configuring an approval

Specifying automated approvers

- **Step 5:** During the next step (optional), you can specify “automated approvers”
 - Automated approvers dynamically route records based on the value of the field in the record
- Specify who can edit the record whilst in approval process

Step 3. Specify Approver Field and Record Editability Properties

Specify automated approvers (if any)

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By

--None--

Use Approver Field of Opportunity Owner

☐

Specifying edit ability of records whilst in approval process

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.

Figure: Specifying automated approvers and record edit ability – Configuring an approval

Informing approvers

- **Step 6:** In the next step (optional), you can set whether approvers (dynamic or static) should be send an email
 - The email to be sent can be customized using an email template

Step 4. Select Notification Templates

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

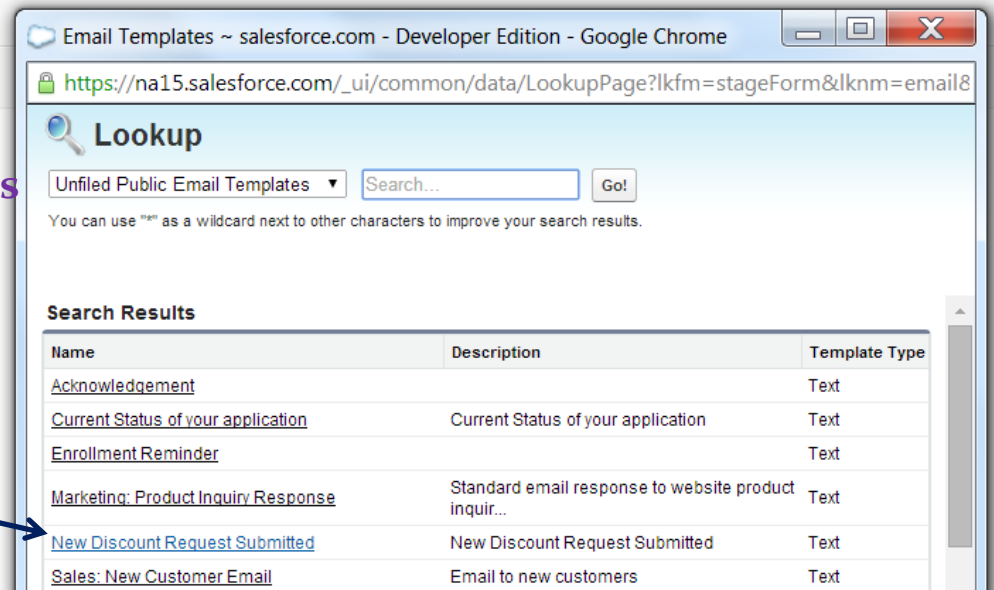
Approval Assignment Email Template



Do you wish to send an email to approvers informing them of record submission?

If yes, you can specify a customized email template

Figure: Informing approver – Configuring an approval



Setting up approval page layout

- **Step 7:** During this stage, you are required to specify:
 - Fields in Approval Page Layout: Specify which fields from the relevant object should be included in the approval page layout (i.e., which relevant information do you want displayed to the approvers?)
 - Approval History: For multi-stage approvals should all the *relevant* approval history be displayed?
 - Security Settings: Should the approvers be able to access the approval page from within Salesforce, or otherwise?

Setting up 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 below, choose the fields to display on this page.

Available Fields

Created By
Current Generator(s)
Delivery/Installation Status
Description
Forecast Category
Last Modified By
Lead Source
Main Competitor(s)
Next Step
Order Number
Primary Campaign Source
Private
Quantity
Stage

Add
Remove

Selected Fields

Opportunity Name
Opportunity Owner
Account Name
Close Date
Discount Percentage
Expected Revenue
Probability (%)

Up
Down

Approval Page Layout fields



[Click here to view an example](#)

Approval History

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.com application. (Recommended)
- ☐ Allow approvers to access the approval page from within the salesforce.com application, or externally from a wireless-enabled mobile device. [i](#)

Security setting of the approval page

Figure: Setting up approval page layout – Configuring an approval

Who can submit an approval and recall it?

- **Step 8:** Specify users who can submit a given record for approval, and whether records can be recalled

Step 6. Specify Initial Submitters

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.

Initial Submitters

Submitter Type Search: for:

Available Submitters

User: Farookh Hussain
User: Gloria Alice

Add

Remove

Allowed Submitters

Record Creator

Specify users who can submit a record for approval

Specify whether a record could be recalled? (optional)

Submission Settings

☒ Allow submitters to recall approval requests

Figure: Specifying submitters and record recall – Configuring an approval

Overview of approval process (so far..)


Approval Processes

Opportunity: Discount Process Automation for ABC

[« Back to Approval Process List](#)

Process Definition Detail

[Edit](#) [Clone](#) [Delete](#) [View Diagram](#)

Process Name	Discount Process Automation for ABC		Active	<input type="checkbox"/>	
Unique Name	Discount_Process_Automation_for_ABC		Next Automated Approver Determined By		
Description	This approval process automates the entire discount process within ABC				
Entry Criteria	Opportunity: Discount Percentage GREATER OR EQUAL 0				
Record Editability	Administrator OR Current Approver		Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>	
Approval Assignment Email Template	New Discount Request Submitted				
Initial Submitters	Record Creator				
Created By	Farookh Hussain, 8/1/2014 8:13 PM		Modified By	Farookh Hussain, 8/1/2014 8:13 PM	


Initial Submission Actions [i](#)

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	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

Recall Actions [i](#)

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Figure: Approval process after initial configuration

Initial Submission Actions

- Record automatically locked (cannot be changed)
- However, one or more actions to the initial submission action
 - Field Update;
 - Email Alert;
 - Task.
- You can define a new action by selecting “Add New”, or add an existing action

Add an action to an initial submission action

Action	Type	Description
Record Lock		Lock the record

Buttons: Add Existing, Add New (dropdown menu open with options: Task, Email Alert, Field Update, Outbound Message)

You can add an existing action to the set of initial actions

Example initial submission action – Field Update

Edit Field Update

Discount Approval in Process

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to set.

Specify the details of the task

Field Update Edit

SaveSave & NewCancel

Identification

NameDiscount Approval in Process

Unique NameDiscount_Approval_in_Progress ⓘ

DescriptionThe record has met the entry conditions. Status needs to be changed to "In Progress"

ObjectOpportunity

Field to UpdateApproval Status ▼

Field Data TypePicklist

Re-evaluate Workflow Rules after Field Change☐ ⓘ

Specify New Field Value

Picklist Options

☐ The value above the current one

☐ The value below the current one

☒ A specific value Pending ▼

SaveSave & NewCancel

Figure: Setting a field update as an initial submission action

Example initial submission action – Email Alert

Step 2. Custom Email Template: New Template

Defining a new email template as an initial submission action

Email Template Information

Folder	Unfiled Public Email Templates ▼
Available For Use	<input checked="" type="checkbox"/>
Email Template Name	Record successfully sub
Template Unique Name	Record_successfully_su ⓘ
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1) ▼
Description	Record_successfully_submitted_to_approval



Step 3. Create HTML version

HTML Email Content

Subject	Record successfully approved
HTML Body	<p>Dear Sir/Madam;</p> <p>Thank you very much for submitting an approval. This is to confirm that your approval has passed the initial criteria test and is now with the approvers</p> <p>With Best Regards</p>

Figure: Setting an email alert as an initial submission action

Example initial submission action – Email Alert

New Email Alert

Specify the setting of the email alert as an initial submission action

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications are lost.

Email Alert Edit Save Save & New Cancel

Edit Email Alert

Description

Unique Name i

Object

Email Template 🔍

Protected Component ☐

Recipient Type Search: for: Find

Recipients

Available Recipients	Selected Recipients
--None--	Record Creator

Add ▶

Figure: Setting an email alert as an initial submission action

Initial Submission Actions – after specification

Process Definition Detail

EditCloneDeleteView Diagram

Process Name	Discount Process Automation for ABC	Active	<input type="checkbox"/>	i
Unique Name	Discount_Process_Automation_for_ABC	Next Automated Approver Determined By		
Description	This approval process automates the entire discount process within ABC			
Entry Criteria	Opportunity: Discount Percentage GREATER OR EQUAL 0			
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>	
Approval Assignment Email Template	New Discount Request Submitted			
Initial Submitters	Record Creator			
Created By	Farookh Hussain, 8/1/2014 8:13 PM	Modified By	Farookh Hussain	


Initial Submission Actions [i](#)

Add ExistingAdd New

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Your record has been submitted to approvers
Edit Remove	Field Update	Discount Approval in Process

Approval Steps [i](#)

New Approval Step

 You have not yet defined any approval steps

Final Approval Actions [i](#)

Add ExistingAdd New

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

Final Rejection Actions [i](#)

Add ExistingAdd New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Initial submission actions

Figure: Approval process after configuration and defining initial submission actions

Creating approval steps

- An approval process can be comprised of a single or multiple stages:
 - The settings for each stage needs to be defined
 - Name and description of the approval stage;
 - Entry Criteria for that stage;
 - Approvers for that stage
 - The approver for each step can be different



Creating approval steps

- Multiple actions can be defined against each approval step
- The actions associated with each approval step can be categorized *broadly* into two parts:
 - Actions to take if record is accepted at that stage ([Approval Actions](#))
 - Corresponding actions could be email alert, task or field update;
 - Multiple actions could be defined against this stage.
 - Actions to take if approval is declined at that stage ([Rejection Actions](#))
 - Corresponding actions could be email alert, task or field update;
 - Again, multiple actions could be defined against this stage.

Defining first approval stage - Particulars

- **Step 1**: Specify the particulars of the first approval stage

Step 1. Enter Name and Description

Enter a name, description, and step number for your new approval step.

Enter Name and Description

Approval Process Name	Discount Process Automation for ABC
Name	<input type="text" value="Approval by Head of Department"/>
Unique Name	<input type="text" value="Approval_by_Head_of_Department"/> <small>i</small>
Description	<input type="text" value="During this stage the Head of Department either approves or declines the approval request"/>
Step Number	<input type="text" value="1"/>

Particulars of the current approval stage

Approval step number within the entire approval process

Defining first approval stage – Entry criteria

- **Step 2:** Specify the entry criteria for records to enter this stage:
 - This specifies which records should enter this approval stage;
 - Only during the first approval stage you can either automatically decline or approve records.

Should all records enter this approval stage?

If selected records should enter this approval stage, what are the criteria?

The screenshot shows a form titled "Step 2. Specify Step Criteria". It contains a section "Specify Step Criteria" with two radio buttons. The first radio button is "All records should enter this step." and the second is "Enter this step if the following criteria are met", which is selected. Below this is a table with four rows for defining criteria. The first row is filled out: "Opportunity: Discount Percentage" in the "Field" column, "greater or equal" in the "Operator" column, and "5" in the "Value" column. The other three rows are empty, each starting with "--None--" in the "Field" column. To the right of each row is an "AND" connector. At the bottom of the form is a link "Add Filter Logic...".

Field	Operator	Value	
Opportunity: Discount Percentage	greater or equal	5	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

[Add Filter Logic...](#)

What should be done to records that fall below the first approval stage threshold? This option is available only during the first approval stage

Defining approvers for first approval stage

- **Step 3:** Specify who should be able to approve records during the first approval stage

Step 3. Select Assigned Approver

If you want to allow the person submitting the record to select an approver, then select this option

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

☐ Let the submitter choose the approver manually.

☒ Automatically assign to approver(s).


User 

[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. 

You can select multiple approvers to approve at this stage

If you would the delegate of the approver to approve, then select this checkbox

Actions with each approval stage

- Each approval stage can have multiple actions associated with it.
- There could be distinct set of approval actions or rejection actions
 - These actions could be email alert, field update or task

Approval Steps i New Approval Step

Action	Step Number	Name	Description	Criteria
Hide Actions Edit Del	1	Approval by Head of Department	During this stage the Head of Department either approves or declines the approval request	Opportunity: Discount Percentage GREATER OR EQUAL Approve

✓ Approval Actions Add Existing Add New ▼

Action	Type	Description
Edit Remove	Email Alert	Thank you very much - Head of Department
Edit Remove	Email Alert	Head of Department approval procured

✗ Rejection Actions Add Existing Add New ▼

Action	Type	Description
Edit Remove	Email Alert	Thank you very much - Head of Department
Edit Remove	Email Alert	Head of Department approval declined

Separate set of actions can be associated with approval and rejection actions with this step. This is optional

Defining subsequent approval stages

- You can define up to thirty approval stages within a single approval process

Step 1. Enter Name and Description

Details of the first stage approval process

Enter a name, description, and step number for your new approval step.

Previous Approval Step Information	
Step Number:	1
Name:	Approval by Head of Department
Criteria:	Opportunity: Discount Percentage GREATER OR EQUAL 5
Assign To:	User : Gloria Alice

Enter Name and Description

Approval Process Name	Discount Process Automation for ABC	
Name	<input type="text" value="Approval by the Chief Executive Officer"/>	
Unique Name	<input type="text" value="Approval_by_the_Chief_Executive_Officer"/>	
Description	<input type="text" value="This approval stage automates the approval process from the Chief Executive Officer"/>	
Step Number	<input type="text" value="2"/>	

Particulars of the second approval stage

Defining subsequent approval stages

- Specify which records should be able to enter this approval stage
 - Notice that there is no auto-accept or auto-reject action

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

Previous Approval Step Information

Step Number:	1
Name:	Approval by Head of Department
Criteria:	Opportunity: Discount Percentage GREATER OR EQUAL 5
Assign To:	User : Gloria Alice

Specify Step Criteria

- ☐ All records should enter this step.
- ☒ Enter this step if the following criteria are met ▼ :

Field	Operator	Value	
Opportunity: Discount Percentage ▼	greater or equal ▼	8	AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		

Criteria to determine which records will enter this approval stage

[Add Filter Logic...](#)

Defining subsequent approval stages

- Selecting approvers: Similar to the first stage, approvers can be selected for subsequent stages
 - The selected approvers, for each of the subsequent stages, can be different from the first stage
- Reject Behaviour:
 - This part is not there is the first approval stage, however, every subsequent approval stage has it;
 - In case the approval request is declined, which set of rejection actions should be carried out?

Defining subsequent approval stages

Select Approver

- ☐ Let the submitter choose the approver manually.
- ☒ Automatically assign to approver(s).

User ▼

Farookh Hussain




Specifying approvers for second stage

[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)

If the approval is declined, which set of rejection actions should be carried out?

Subsequent approval actions

- Similar to the first stage, each approval stage can have multiple actions associated with it.
 - There could be set of approval actions or rejection actions;
 - These actions could be email alert, field update or task

Multiple actions can be associated when approval is procured or declined for each of the subsequent stages

Approval Steps ⓘ New Approval Step

Action	Step Number	Name	Description	Criteria
Show Actions Edit Del	1	Approval by Head of Department	During this stage the Head of Department either approves or declines the approval request	Opportunity: Discount Percentage GREATER OR EQUAL 5 , else Approve
Hide Actions Edit Del	2	Approval by the Chief Executive Officer	This approval stage automates the approval process from the Chief Executive Officer	Opportunity: Discount Percentage GREATER OR EQUAL 8

✓ Approval Actions Add Existing Add New ▼

Action	Type	Description
Edit Remove	Email Alert	<u>Thank you very much - Chief Executive Officer</u>
Edit Remove	Email Alert	<u>Approval received from the Chief Executive Officer</u>

✗ Rejection Actions Add Existing Add New ▼

Action	Type	Description
Edit Remove	Email Alert	<u>Approval declined by the Chief Executive Officer</u>
Edit Remove	Email Alert	<u>Thank you very much - Chief Executive Officer</u>

Final Approval Actions

- Set of actions to be carried out in case the record is finally approved
 - Multiple actions could be associated with this stage of the approval
 - These actions could be email alert, field update or task
 - By default the record is locked, but this can be edited
- Select “Add New” in the “Final Approval Actions” section to define new actions

Final Approval Actions i			Add Existing	Add New ▼
Action	Type	Description		
Edit	Record Lock	Lock the record from being edited		
Edit Remove	Email Alert	Email to the record submitter		
Edit Remove	Field Update	Update the field to Approved		

Multiple actions to be carried out when final approval has been procured for this record

Final Rejection Actions

- Set of actions to be carried out in case approval is declined
 - Multiple actions could be associated with this stage;
 - These actions could be email alert, field update or task;
 - By default the record is unlocked, but this can be edited.
- Select “Add New” in the “Final Rejection Actions” section to define new actions

Final Rejection Actions

Add Existing

Add New ▼

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	<u>Update the field to Rejected</u>
Edit Remove	Email Alert	<u>Sorry your approval has been declined</u>

Multiple actions to be carried out when the final overall decision to decline has been made

Recall actions

- Set of actions to be carried out, in case, the record is recalled:
 - Similar to final approval and rejection action elements, multiple actions could be associated with this stage;
 - These actions could be email alert, field update or task
 - By default the record is locked and this cannot be changed.

Recall Actions

[Add Existing](#)[Add New](#) ▼

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing
	Email Alert	<u>Email to the record submitter notifying record recall</u>

Multiple actions can be carried out when a given record is recalled

Example of creating a recall action – Email Alert

- This email alert will inform the record creator that the record has been recalled.

Email Alert Edit Save Save & New Cancel

Edit Email Alert

Description

Unique Name i

Object

Email Template 🔍

Protected Component ☐

Recipient Type Search: for: Find

Recipients

Available Recipients		Selected Recipients
User: Farookh Hussain	Add	Record Creator
User: Gloria Alice		

Details of the recall
action

Figure: Setting an email alert as a recall action

Email template for recall action

Email Template Detail

EditDeleteClone

Folder	Unfiled Public Email Templates
Email Template Name	Recall
Template Unique Name	Recall
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Author	Farookh Hussain [Change]
Description	Recall
Created By	Farookh Hussain , 8/2/2014 12:49 AM

EditDeleteClone

Body of the email template

Email Template

Send Test and Verify Merge Fields

Subject | Recall

Plain Text Preview

Dear {!Opportunity.CreatedBy}

A record has been recalled. If you have not recalled this record, then contact your administrator as soon as possible.

With Best Regards

Figure: Example email template – To be used when a record is recalled

Pictorially depicting the approval process

- Use “view diagram” on the approval process overview section, to pictorially view the entire approval process

Approval Processes


Opportunity: Discount Process Automation for ABC

[« Back to Approval Process List](#)

Process Definition Detail

[Edit](#) [Clone](#) [Delete](#) [Activate](#) [View Diagram](#)

Process Name	Discount Process Automation for ABC	Active	<input type="checkbox"/>
Unique Name	Discount_Process_Automation_for_ABC	Next Automated Approver Determined By	
Description	This approval process automates the entire discount process within ABC		
Entry Criteria	Opportunity: Discount Percentage GREATER OR EQUAL 0		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	New Discount Request Submitted		
Initial Submitters	Record Creator		
Created By	Farookh Hussain , 8/1/2014 8:13 PM	Modified By	Farookh Hussain , 8/2/2014 12:00 PM



Click on “View Diagram” to visualize the entire approval process

Activating approvals

- Click on “Activate” on the approval process overview section, to active it:
 - Once an approval process is activated it cannot be edited;
 - The only way to edit an active approval process is to “Deactivate” it, and “Clone” it with a new name.

Approval Processes


Opportunity: Discount Process Automation for ABC

[« Back to Approval Process List](#)

Process Definition Detail

[Edit](#) [Clone](#) [Delete](#) [Activate](#) [View Diagram](#)

Process Name	Discount Process Automation for ABC	Active	<input type="checkbox"/>
Unique Name	Discount_Process_Automation_for_ABC	Next Automated Approver Determined By	
Description	This approval process automates the entire discount process within ABC		
Entry Criteria	Opportunity: Discount Percentage GREATER OR EQUAL 0		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	New Discount Request Submitted		
Initial Submitters	Record Creator		
Created By	Farookh Hussain , 8/1/2014 8:13 PM	Modified By	Farookh Hussain , 8/2/2014 12:



Click on “Activate” to activate approval process

Conclusion

- Approvals
 - Initial configuration/setup
 - Initial submission step
 - Approval stages
 - Different Approvers
 - Multiple Actions for approval stages
 - Final acceptance / rejection / recall actions



Reading

Books

1. McGuire, C., Roth, C., Carroll, D., and Tran, N. (2013), Force.com Fundamentals: An Introduction – Chapter 8