

Lab on developing approvals

Purpose of this lab:

The purpose of this lab is to impart the skills and ability to develop and deploy approvals within the Force.com PaaS.

Case study description:

In the past few years, the University of Darwin (UD) has been approving or declining requests for fees discount from prospective students, on an ad-hoc basis. This has resulted in either loss of revenue to the university (in scenarios wherein fee discounts were awarded to non-meritorious students); or loss of high quality students (in scenarios wherein fee discounts were declined to meritorious students). Additionally, in many cases, fee discount requests were not being channelled to the right persons.

In order to streamline, and better manage all the requests for fee discounts from prospective students, you have been hired as a developer. You are required to develop an entire approval process for the University of Darwin within the Force.com PaaS, which is structured as follows:

When a new request for fee discount is made, the following information be made available with it: *Requested Discount Percentage*, *Discount Approval Status*, and the *Client for whom the discount has been requested*.

UD would like to implement a two-phase approval process. For accountability reasons, they would like to ensure that every discount goes through the approval process. As soon as a discount request has been successfully lodged, the corresponding *Discount Approval Status* should be set to “*Requested*”. Additionally, the person submitting the discount request should receive an acknowledgment via email.

If the requested fee discount is less than 5%, the discount request should be automatically approved.

However, if the requested fee discount is between 5% - 8%, they are dealt during the first phase (remember that this is a two-phased approval process). The *Head of Department* has the authority to either approve or decline discount requests between 5%-8%. Irrespective of the whether the request is accepted or declined by the Head of Department, subject to acceptance or rejection, the *Discount Approval Status* on the discount record should be updated correspondingly. Additionally, an email should be sent to the person submitting the discount request informing him of the status update.

Fee discount requests greater than 8%, are to be approved by both the Head of Department and the Dean. The Dean has the authority to either approve or decline discount requests made to him. Irrespective of his decision, the Discount Approval Status on the discount record should be

updated correspondingly and an email should be sent to the person submitting the discount request informing him of the status update.

Finally, if the request is accepted by both the Head of Department *and* the Dean, the *Discount Approval Status* should be updated to “Approved” and a task assigned to the person who created the record to inform the student about this. Similar corresponding set of actions need to be carried out, in case, the record is finally declined.

Part (1): For the above described system, create a new custom object “Fees Discount”.

Note: The potential custom fields for this object could be *Discount ID* (AutoID), *Discount Status* (Picklist); *Requested Discount Percentage* (Percentage); and *Client Requested For* (Text).

Part (2): Identify the need for initial submission actions and define them.

Hint: Define the following initial submission actions for this approval:

- Field Update - Update the value of Discount Approval Status to “Requested”
- Email Alert - Send an automated acknowledge email to the person submitting for approval

Part (3): Identify approval stages for the above case study. Do the approval stages have associated actions?

Hint: Define the following approval stages. Please note that approval stage has associated actions:

- Approval Step 1 - Will be handled by the Head of Department. If the decision at this step is “Approve”, then the *Discount Status* on the record should be updated (*Approved by the Head of Department*). Additionally, the submitter should be informed of this. Similarly, if the decision at this step is “Decline”, then the Discount Status on the record should be updated (*Declined by the Head of Department*), and the submitter should be correspondingly informed;
- Approval Step 2 - Will be handled by the Dean. If the decision at this step is “Approve”, then the Discount Status on the record should be updated (*Approved by the Dean*), and the submitter should be informed. Similarly, if the decision at this step is “Decline”, then the Discount Status on the record should be updated (*Declined by the Dean*), and the submitter should be correspondingly informed;
- Assign yourself as the Dean and one of your friends as the Head of Department.

Part (4): Identify the actions with the final approval, final rejection, and recall actions for the above case study and define them.

Hint: Based on the above case study, the following actions can be associated with the final approval, final rejection, and recall steps

- Final approval step - The discount status on the record should be updated to “*Approved*” and a task (requesting him to inform the student), should be assigned to the submitter;
- Final rejection step - The discount status on the record should be updated to “*Rejected*” and a task (requesting him to inform the student) should be assigned to the submitter.