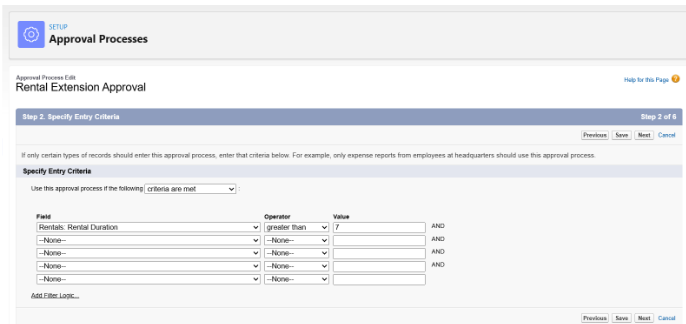
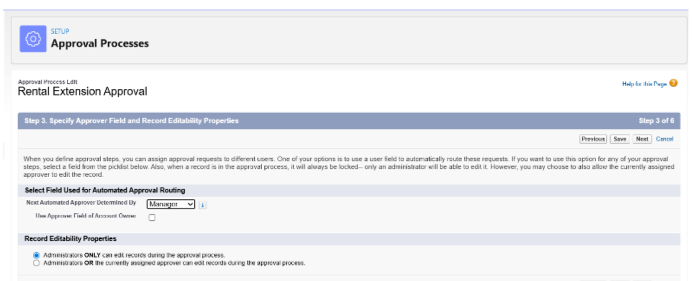
PHASE 8) Approval process

Based on how the business runs, I create two approvals process. The first approval process will be rental extension approval, for any customer who wants to rent a product for more than 7 days, the order has to go through an approval process. The second one will be for wedding party, every wedding which has more than 10 groomsmen attending and that they all renting the full package usually get 15% discount. But if the groom wants to have a bigger discount, the manager will have to approve it.

Extension approval process

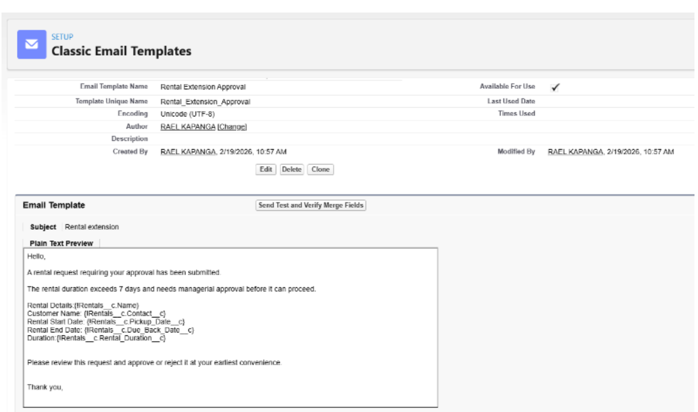


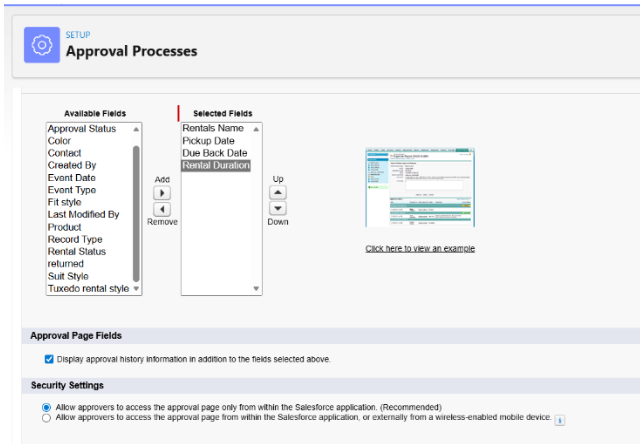
Criteria: if then rental duration is more than 7 days

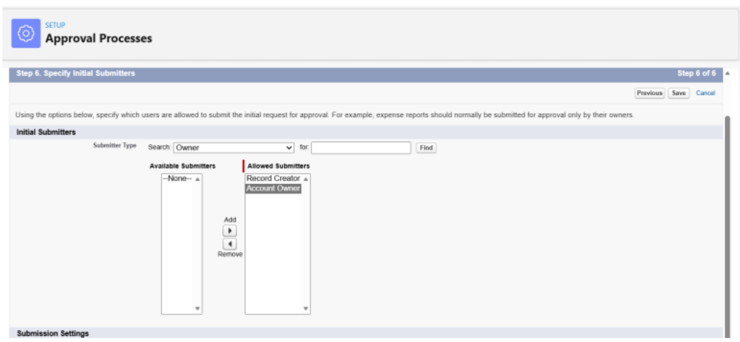


The request needs to be approved by the manager

I have create a rental extension approval email template

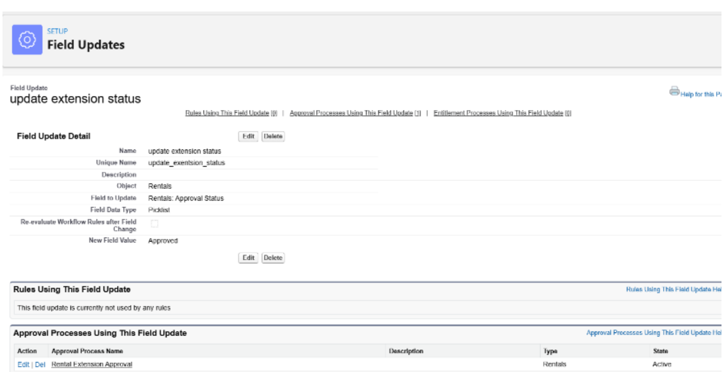






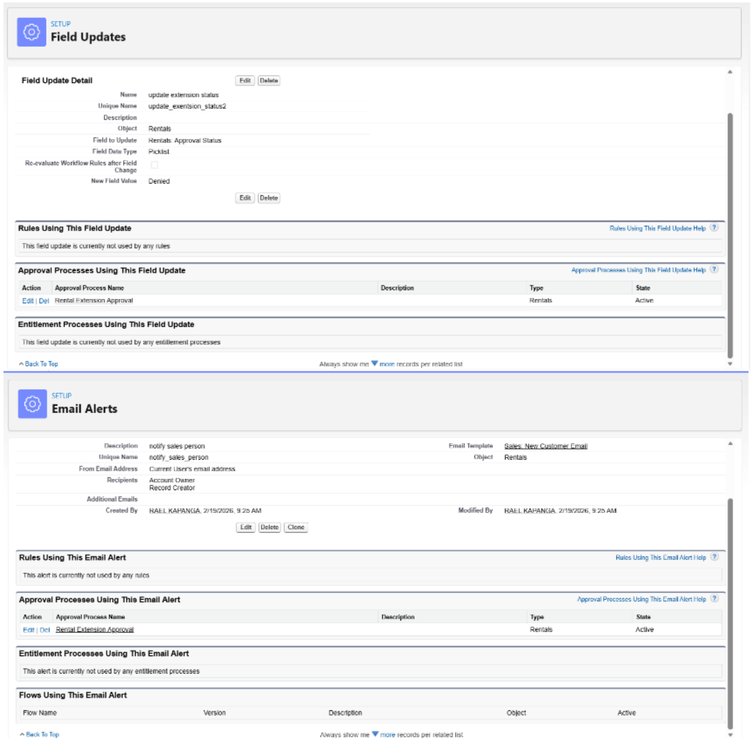
Actions for when the request is approved

- **Approval status field has to be updated: set the field to Approved**

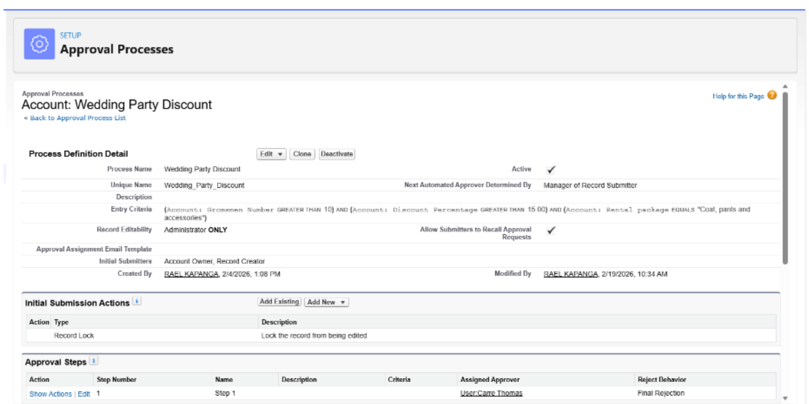


Actions for when the request is not approved

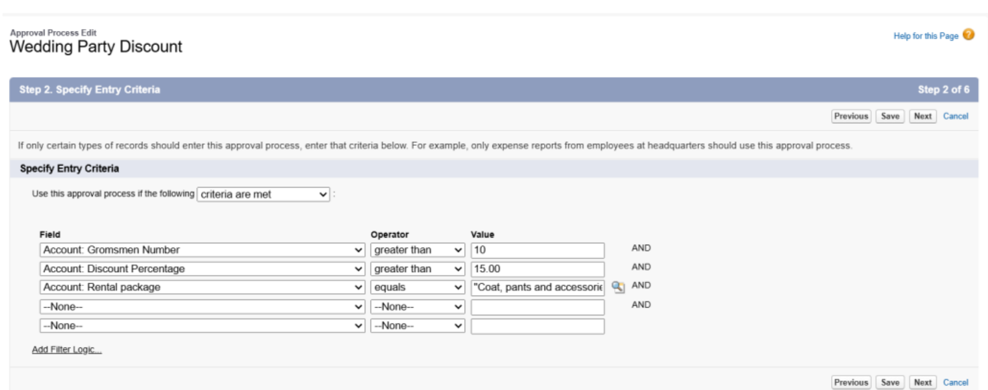
Approval status field has to be updated to Denied and an email alert should be sent to the owner of the record



Configuration of Wedding Party Discount Approval Process

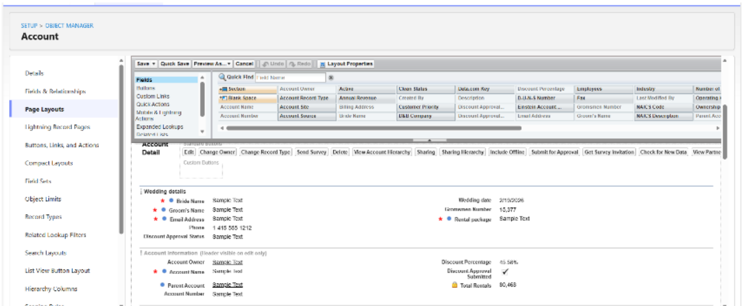


Step 1

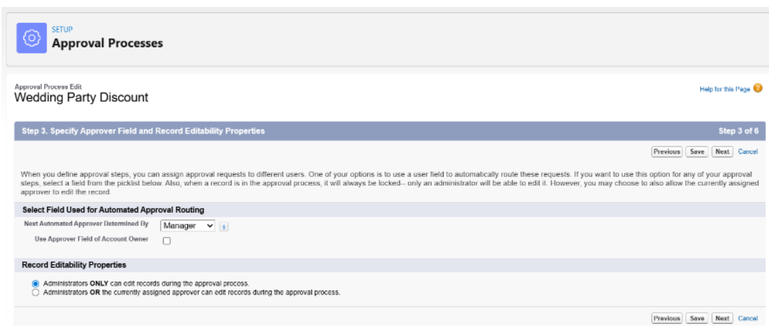


I have created the Discount Percentage Custom field on the standard Account object first and other custom field related to wedding information.

Wedding page layout

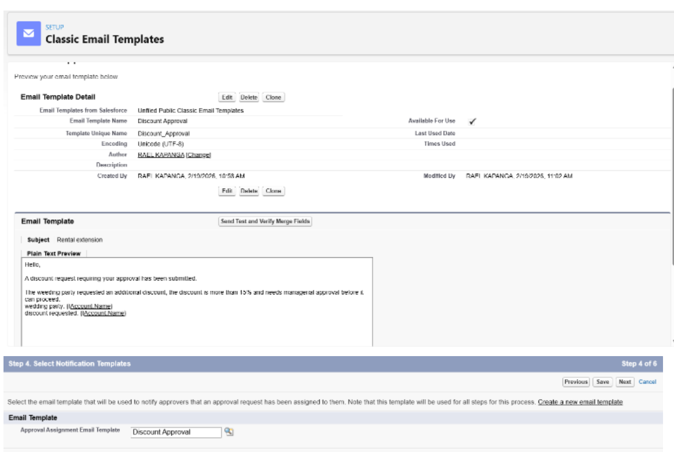


Step 2



Step 3

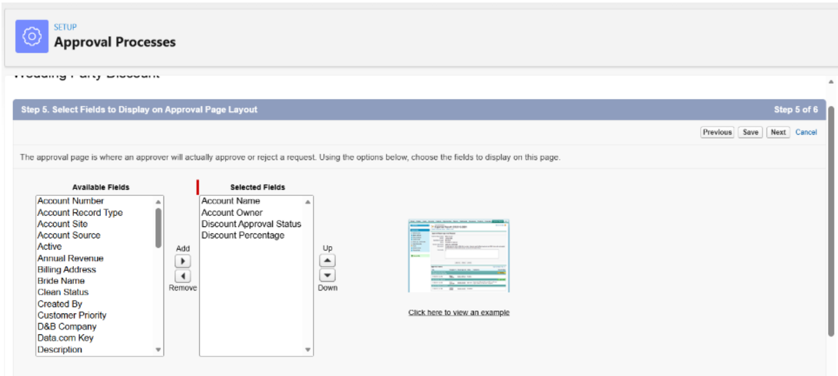
Email template created



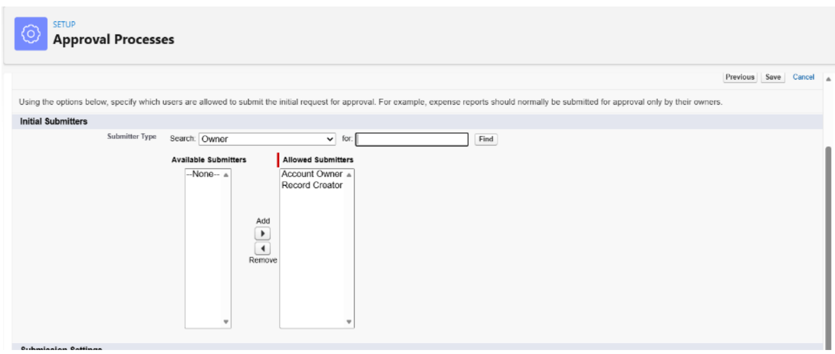
Step 4

Field to be displayed on the approval page layout

The account name, the account owner, the approval status and the discount percentage requested.



Step 4

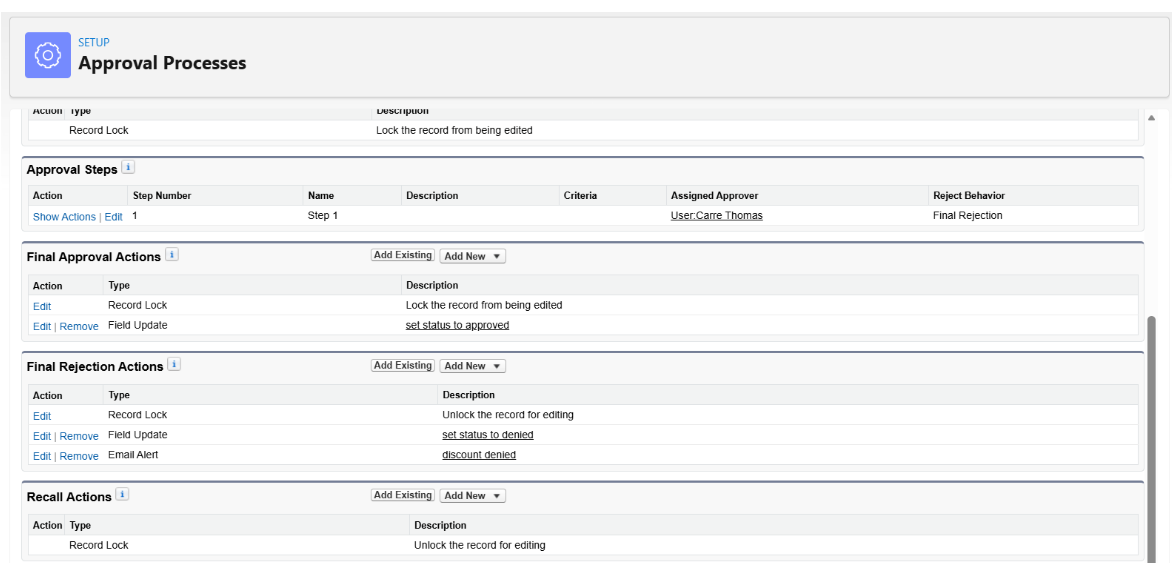


People that can submit the approval request

Step 5

Actions when the approval request is approved: the approval status field is updated to Approved

Actions when the approval request is denied: the approval status field is updated Denied and an email is sent to the owner.



Phase 9) Security Model of The Organization

This is the last step of my project, after the configuration of the org and have data set in place, is time to end the set up of my organization by configuring the data access.

In this last section of my project I will be configuring the security and data access in 3 layers

- Object-level : Who can view, create, edit, or delete a type of record
(profiles & permission sets)
- Record-level : Which records users can access
(roles, OWD, and sharing rules)
- Field-level : Which specific fields users can view/edit
(field-level security & page layouts)

The first step was done when starting this project by creating Profiles, Roles and assigning each users to their respective Roles and Profiles.

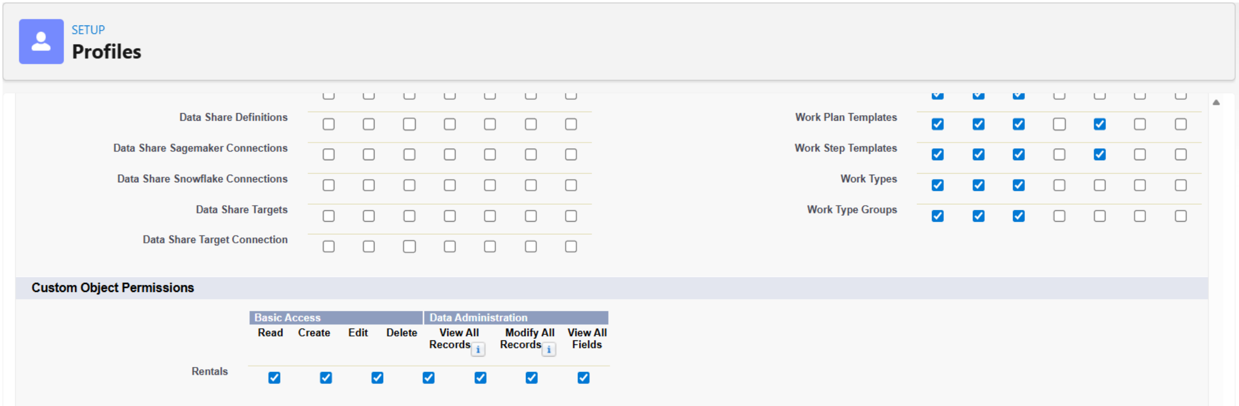
Configuration of Object Permissions

Object	CEO	Manager	Sales	Marketing	Customer Service
Account	Read/Edit/Delete	Read/Edit	Read/Edit	Read	Read
Contact	Read/Edit/Delete	Read/Edit	Read/Edit	Read	Read
Rental (Custom)	Read/Edit/Delete	Read/Edit	Read/Edit	Read	Read
Product	Read/Edit	Read/Edit	Read	Read	Read
Price Book	Read/Edit	Read/Edit	Read	Read	Read

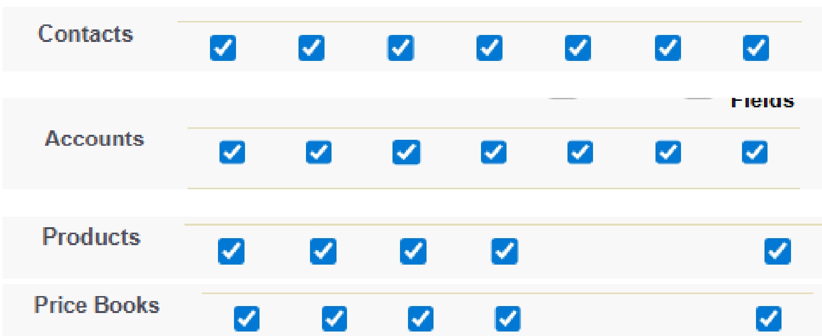
The following permissions allow the following access to those object

- the CEO to have access to all data within those objects, and he can view, edit and delete all data in the organization
- the manager has the same permission but cannot delete records in the Account, Contact and Rentals object and can only view an edit product and pricebook but cannot delete them and they only have access to record that is under their management.
- user under Sales profile can view and edit record that only belong to them, but they are only able to view product and pricebook
- Users under marketing profile have permission to only view record
- User under Customer service profile can only view records on the account, contact and product object but cannot edit or delete them and the rental object the will be able to only see the status of the rental to give better customer service to people asking about the status of their rental. They cannot see the price book

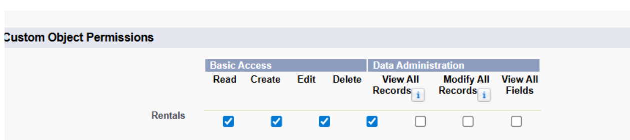
- Custom object permission on the CEO profile



- Standard object permission on the CEO profile

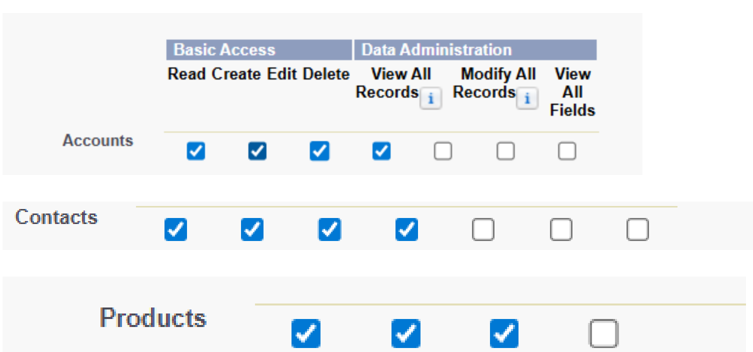


- Custom object permission on the manager profile



I did give the data administration access because the manager only view edit and delete record own by salesperson they manage and not the data of the whole company.

- Standard object permission on the Manger profile



Price Books	☑	☑	☑	☐			☐

- custom object permissions on the sales profile

Custom Object Permissions

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Rentals	☑	☑	☑	☐	☐	☐	☐

The sales person can only read create and edit records that belongs to them

- Standard object permissions on the sales profile

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Accounts	☑	☑	☑	☐	☐	☐	☐
Contacts	☑	☑	☑	☐	☐	☐	☐
Price Books	☑	☐	☐	☐			☐
Products	☑	☐	☐	☐			

- custom object permissions on the marketing profile

Custom Object Permissions

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Rentals	☑	☐	☐	☐	☐	☐	☐

- Standard object permissions on the marketing profile

							Fields
Accounts	☑	☐	☐	☐	☐	☐	☐
Contacts	☑	☐	☐	☐	☐	☐	☐
Price Books	☑	☐	☐	☐			☐
Products	☑	☐	☐	☐			☐

- Custom object permissions on the customer service profile

Custom Object Permissions

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Rentals	☑	☐	☐	☐	☐	☐	☐

- Standard object permissions on the customer service profile

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Accounts	☑	☐	☐	☐	☐	☐	☐
Contacts	☑	☐	☐	☐	☐	☐	☐
Price Books	☑	☐	☐	☐			☐
Products	☑	☐	☐	☐			☐

Setting the Organization-Wide Defaults (OWD)

This setting will help me set who can see whose data by default. I will be configuring the default access of the account, contact, priceBooks, products and the rentals custom objects.

- Account object: Default Internal Access set to private, only owner & their manager can see record related to the account.
- Contact: Default Internal Access set to Controlled by Parent, this matches Account visibility.
- Rentals (Custom Object): Default Internal Access set to Controlled by Parent, since the Rentals object has a master detail relationship with the Account abject I can't set the default access for the rental object by itself, therefore it mirrors the Account default access. The rentals object will be private as well.
- Product: Default Internal Access set to Public Read Only, every user can see what products are available.
- Bookprice: Default Internal Access set to Use, everyone needs access to add products to rentals

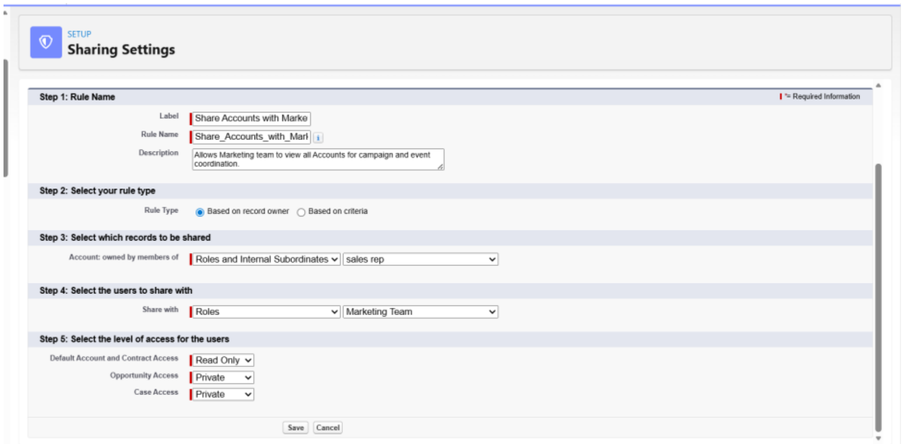
Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Rentals	Controlled by Parent	Controlled by Parent	

Sharing Rules

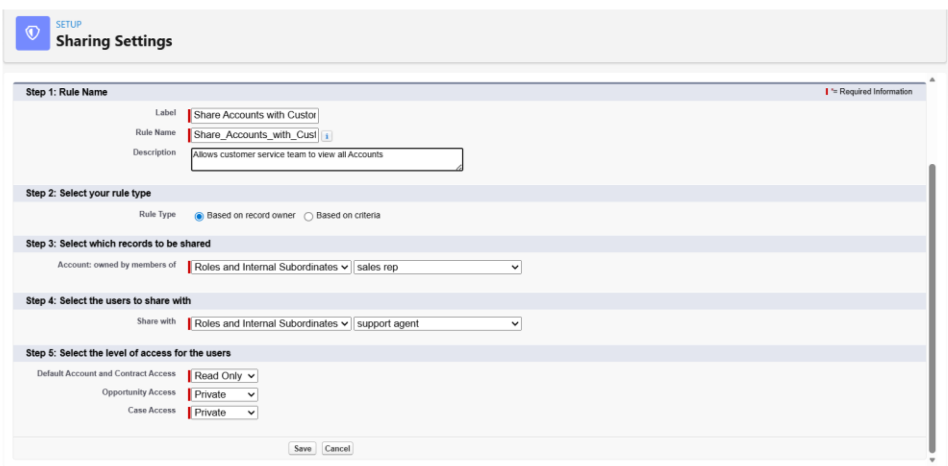
Since Accounts are Private, I need to open visibility for certain roles like Marketing and Customer Service so they can access to record but they can only Read the record and not delete them or edit them, to achieve this I will use sharing rules.

Sharing rule 1: Share All Accounts with Marketing (Read Only)"



Marketing team can see all Accounts, Contacts, and Rental records related to customers.

Sharing rule 2: Share Accounts with Marketing



Customer Service can now see all Accounts, Contacts, and Rental records related to customers, so they can help with returns or overdue rentals.

Sharing rules on the account object

Account Sharing Rules New Recalculate Account Sharing Rules Help

Action	Criteria	Shared With	Account and Contract	Opportunity	Case
Edit | Del	Owner in Role and Internal Subordinates: sales rep	Role: Marketing Team	Read Only	Private	Private
Edit | Del	Owner in Role and Internal Subordinates: sales rep	Role and Internal Subordinates: support agent	Read Only	Private	Private

Role hierarchy gives managers access to the record under their team.

Data model : relationship between my object