

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

Approval Processes

Rental Extension Approval

Step 2: Specify Entry Criteria

Use the approval process if the following criteria are met:

Field	Operator	Value	
Rentals: Rental Duration	greater than	7	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Buttons: Previous, Save, Next, Cancel

Criteria: if then rental duration is more than 7 days

Approval Processes

Rental Extension Approval

Step 3: Specify Approver Field and Record Editability Properties

Select Field Used for Automated Approval Routing

Next Automated Approver Determined by: Manager (1)

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.

Buttons: Previous, Save, Next, Cancel

The request needs to be approved by the manager

I have create a rental extension approval email template

Classic Email Templates

Email Template Name	Template Unique Name	Encoding	Available For Use
Rental Extension Approval	Rental_Extension_Approval	Unicode (UTF-8)	<input checked="" type="checkbox"/>
Author		Times Used	
Description			
Created by		Modified by	

Buttons: Edit, Delete, Clone

Email Template

Subject: Rental extension

Plain Text Preview

Hello,

A rental request requiring your approval has been submitted.

The rental duration exceeds 7 days and needs managerial approval before it can proceed.

Rental Details (Rentals__c Name):
Customer Name: (Rentals__c Contact__c)
Rental Start Date: (Rentals__c Pickup_Date__c)
Rental End Date: (Rentals__c Check_Back_Date__c)
Duration: (Rentals__c Rental_Duration__c)

Please review this request and approve or reject it at your earliest convenience.

Thank you.

Approval Processes

Available Fields

- Approval Status
- Color
- Contact
- Created By
- Event Date
- Event Type
- Fit style
- Last Modified By
- Product
- Record Type
- Rental Status
- returned
- Suit Style
- Tuxedo rental style

Selected Fields

- Rentals Name
- Pickup Date
- Due Back Date
- Rental Duration

[Click here to view an example](#)

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 application. (Recommended)

☐ Allow approvers to access the approval page from within the Salesforce application, or externally from a wireless-enabled mobile device.

Approval Processes

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 only by their owners.

Initial Submitters

Submitter Type: Search: Owner for Find

Available Submitters

- None

Allowed Submitters

- Record Creator
- Approved Owner

Submission Settings

Actions for when the request is approved

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

Field Updates

Field Update: update extension status

[Rules Using This Field Update \(0\)](#) | [Approval Processes Using This Field Update \(1\)](#) | [Entitlement Processes Using This Field Update \(0\)](#)

Field Update Detail

Name	update extension status
Unique Name	update_extension_status
Description	
Object	Rentals
Field to Update	Rentals: Approval Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	Approved

[Edit](#) [Delete](#)

Rules Using This Field Update

This field update is currently not used by any rules.

Approval Processes Using This Field Update

Action	Approval Process Name	Description	Type	Status
Edit Del	Extend Extension Approval		Rentals	Active

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

Field Updates

Field Update Detail

Name

update extension status

Edit

Delete

Unique Name

update_extension_status2

Description

Rentals

Object

Rentals

Field to Update

Itemable Approval Status

Field Data Type

Picklist

Re-evaluate Workflow Rules after Field Change

☐

New Field Value

Denied

Edit

Delete

Rules Using This Field Update

This field update is currently not used by any rules

Rules Using This Field Update Help

Approval Processes Using This Field Update

Approval Processes Using This Field Update Help

Action	Approval Process Name	Description	Type	Status
Edit Del	Rentals Extension Approval		Rentals	Active

Entitlement Processes Using This Field Update

This field update is currently not used by any entitlement processes

[Back To Top](#)
Always show me **5** recent records per related list

Email Alerts

Description

notify sales person

From Email Address

notify_sales_person

Recipients

Account Owner

Record Creator

Additional Emails

Created By

RAEL KAPANGA, 2/19/2026, 9:22 AM

Modified By

RAEL KAPANGA, 2/19/2026, 9:22 AM

Edit

Delete

Close

Rules Using This Email Alert

This alert is currently not used by any rules

Rules Using This Email Alert Help

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help

Action	Approval Process Name	Description	Type	Status
Edit Del	Rentals Extension Approval		Rentals	Active

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
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[Back To Top](#)
Always show me **5** recent records per related list

Configuration of Wedding Party Discount Approval Process

Approval Processes

Approval Processes

Account: Wedding Party Discount

[Back to Approval Process List](#)

Process Definition Detail

Process Name

Wedding Party Discount

Edit

Clone

Deactivate

Unique Name

Wedding_Party_Discount

Description

Next Automated Approver Determined By Manager of Record Submitter

Entry Criteria

{Account: Grossmen Number GREATER THAN 10} AND {Account: Discount_Percentage GREATER THAN 15.00} AND {Account: Rental_package EQUALS "Coat, pants and accessories"}

Record Editability

Administrator ONLY

Approval Assignment Email Template

Initial Submitters

Account Owner, Record Creator

Created By

RAEL KAPANGA, 2/4/2026, 1:06 PM

Modified By

RAEL KAPANGA, 2/19/2026, 10:34 AM

Initial Submission Actions

Action

Type

Description

Record Lock

Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step 1			User: CAEL THOMAS	Final Rejection

Step 1

Approval Process Edit

Wedding Party Discount

Help for this Page

Step 2. Specify Entry Criteria

Step 2 of 6

[Previous](#)
[Save](#)
[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 criteria are met

Field	Account: Grossmen Number	Operator	greater than	Value	10	AND
	Account: Discount Percentage		greater than	15.00		AND
	Account: Rental package		equals	"Coat, pants and accessories"		AND
	--None--		--None--			AND
	--None--		--None--			


Add Filter Logic...

[Previous](#)
[Save](#)
[Next](#)
[Cancel](#)

Wedding page layout

[illegible]

Step 2


Setup

Approval Processes

Approval Process Edit

Wedding Party Discount

[Help for this Page](#)

Step 3. Specify Approver Field and Record Editability Properties

Step 3 of 6

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 approver 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

▼

3

Use Approver Field of Account 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

Save

Next

Cancel

Step 3

Email template created

Classic Email Templates

Preview your email template below:

Email Template Detail

Email Templates from Salesforce	Unified Public Classic Email Templates	
Email Template Name	Discount Approval	Available For Use <input checked="" type="checkbox"/>
Template Design Name	Discount Approval	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	BALI KARANICA (@cvent)	
Description		
Created by	BAPI KARANICA 3/15/2026, 10:58 AM	Modified by BAPI KARANICA 3/15/2026, 11:07 AM

Email Template

Subject Rental extension
Plain Text Preview
 Hello,

 A discount request regarding your approval has been submitted.

 If the **weight** ratio requested an additional discount, the discount is more than 15% and needs managerial approval before it can proceed.
 Writing you this to inform you about the status of the request.
 discount requires [Managerial Approval](#).

Step 4. Select Notification Templates
Step 4 of 6

Select the template which 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

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.

Approval Processes

Step 5. Select Fields to Display on Approval Page Layout Step 5 of 6

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

- Account Number
- Account Record Type
- Account Site
- Account Source
- Active
- Annual Revenue
- Billing Address
- Brand Name
- Clean Status
- Created By
- Customer Priority
- D&B Company
- Data.com Key
- Description

Selected Fields

- Account Name
- Account Owner
- Discount Approval Status
- Discount Percentage

[Click here to view an example](#)

Step 4

Approval Processes

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: for: Find

Available Submitters

- None-

Allowed Submitters

- Account Owner
- Record Creator

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.

Approval Processes

Record Lock Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step 1			User:Carrie Thomas	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	set status to approved

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	set status to denied
Edit Remove	Email Alert	discount denied

Recall Actions

Action	Type	Description
	Record Lock	Unlock the record for editing

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

The screenshot shows the 'Profiles' page in Salesforce Setup. Under 'Custom Object Permissions', the 'Rentals' object is listed with the following permissions:

Basic Access				Data Administration		
Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Standard object permission on the CEO profile

The screenshot shows the 'Profiles' page in Salesforce Setup. Under 'Standard Object Permissions', the following objects are listed with their permissions:

Object	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Price Books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Custom object permission on the manager profile

The screenshot shows the 'Profiles' page in Salesforce Setup. Under 'Custom Object Permissions', the 'Rentals' object is listed with the following permissions:

Basic Access				Data Administration		
Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

The screenshot shows the 'Profiles' page in Salesforce Setup. Under 'Standard Object Permissions', the following objects are listed with their permissions:

Object	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price Books	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 object 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	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>
Product	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Rentals	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>

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)”

SETUP

Sharing Settings

Step 1: Rule Name

Label

Share Accounts with Marke

Rule Name

Share_Accounts_with_Mark

Description

Allows Marketing team to view all Accounts for campaign and event coordination.

Step 2: Select your rule type

Rule Type

☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

Account owned by members of

Roles and Internal Subordinates

sales rep

Step 4: Select the users to share with

Share with

Roles

Marketing Team

Step 5: Select the level of access for the users

Default Account and Contract Access

Read Only

Opportunity Access

Private

Case Access

Private

Save

Cancel

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

Sharing rule 2: Share Accounts with Marketing

SETUP

Sharing Settings

Step 1: Rule Name

Label

Share Accounts with Custor

Rule Name

Share_Accounts_with_Cust

Description

Allows customer service team to view all Accounts

Step 2: Select your rule type

Rule Type

☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

Account owned by members of

Roles and Internal Subordinates

sales rep

Step 4: Select the users to share with

Share with

Roles and Internal Subordinates

support agent

Step 5: Select the level of access for the users

Default Account and Contract Access

Read Only

Opportunity Access

Private

Case Access

Private

Save

Cancel

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

NewRecalculate

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

