

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

The screenshot shows the 'Approval Process Edit' screen for 'Rental Extension Approval'. It's 'Step 2 of 6'. A sub-step 'Specify Entry Criteria' is selected. The instructions say: '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.' Below this, there's a table for defining criteria:

Field	Operator	Value
Rentals__Rental Duration	greater than	7
-None-	-None-	

At the bottom, there are buttons for 'Previous', 'Save', 'Next', and 'Cancel'.

Criteria: if then rental duration is more than 7 days

The screenshot shows the 'Approval Process Edit' screen for 'Rental Extension Approval'. It's 'Step 3 of 6'. A sub-step 'Select Field Used for Automated Approval' is selected. The instructions say: '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 administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.' Below this, there's a table for selecting approver fields:

New Approver Determined By	Manager
Use Approver Field of Record Owner	<input type="checkbox"/>

Below this, under 'Record Editability Properties', there are two radio buttons:

- Administrators ONLY can edit records during the approval process.
- Administrators OR the currently assigned approver can edit records during the approval process.

At the bottom, there are buttons for 'Previous', 'Save', 'Next', and 'Cancel'.

The request needs to be approved by the manager

I have created a rental extension approval email template

The screenshot shows the 'Classic Email Templates' setup screen. A new template 'Rental Extension Approval' is being created. The details are as follows:

Email Template Name:	Rental Extension Approval
Template Unique Name:	Rental_Extension_Approval
Encoding:	Unicode (UTF-8)
Author:	RAEL KAPANGA (Cheng)
Description:	
Created By:	RAEL KAPANGA, 2/19/2026, 10:57 AM

On the right, it says 'Available For Use' with a checked checkbox. Below this, it shows 'Last Used Date' and 'Times Used'.

At the bottom, there are buttons for 'Edit', 'Delete', and 'Close'.

Below the template details, there's a preview area titled 'Email Template' with a 'Send Test and Verify Merge Fields' button. The subject is 'Rental extension' and the plain text preview contains the following message:

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 (Rental__c_Name)
Duration (Rental__c_Duration__c)
Rental Start Date (Rental__c_Pickup_Date__c)
Rental End Date (Rental__c_Pick_Bck_Date__c)
Duration (Rental__c_Duration__c)
Please review this request and approve or reject it at your earliest convenience.
Thank you.

SETUP Approval Processes

Available Fields

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

Selected Fields

Rentals Name
Pickup Date
Due Back Date
Rental Duration

Add Remove Up Down 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.

SETUP 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

Available Submitters: -None- Add Remove

Allowed Submitters: Record Creator, Account Owner

Submission Settings

Actions for when the request is approved

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

SETUP Field Updates

Field Update

update extension status

Rules Using This Field Update | Approval Processes Using This Field Update | Enrollment Processes Using This Field Update

Field Update Detail

Name	update extension status
Unique Name	update_extension_status
Description	Rentals
Object	Rentals
If field is Updated	Rental Approval Status
Field Data Type	picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	Approved

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	Rental 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

SETUP Field Updates

Field Update Detail

Name	update_extension_status
Unique Name	update_extension_status2
Description	
Object	Rentals
Field to Update	Rentals: Approval Status
Field Data Type	Picklist
If evaluate Workflow Rules	Before Record Change
New Field Value	Denied

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	Rental Extension Approval	Rentals	Active	

Entitlement Processes Using This Field Update
This field update is currently not used by any entitlement processes.

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SETUP Email Alerts

Rules Using This Email Alert
This alert is currently not used by any rules.

Approval Processes Using This Email Alert

Action	Approval Process Name	Description	Type	Status
Edit	Rental 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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Configuration of Wedding Party Discount Approval Process

SETUP Approval Processes

Approval Processes
Account: Wedding Party Discount
[Back to Approval Process List](#)

Process Definition Detail

Process Name	Wedding Party Discount	Active	✓
Unique Name	Wedding_Party_Discount	Next Automated Approver Determined By	Manager or Record Submitter
Description			
Entry Criteria	Account: Gromsmen 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	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template	Initial Submitters: Account Owner, Record Creator	Created By	DAN KAPANGA, 2/19/2026, 10:34 AM

Initial Submission Actions

Action Type	Add Existing	Add New
Record Lock	Description: Lock the record from being edited	

Approval Steps

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

Step 1

Approval Process Edit
Wedding Party Discount

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 at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following criteria are met:

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

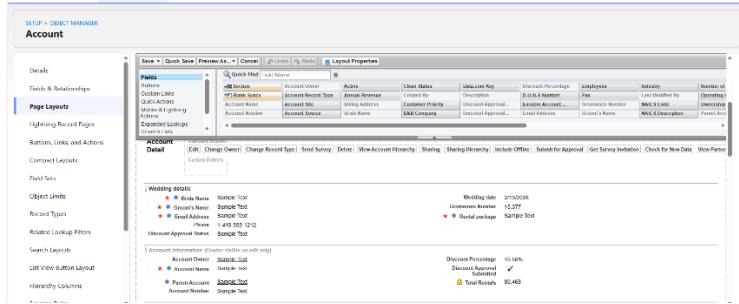
[Add Filter Logic](#)

Step 2 of 6

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

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

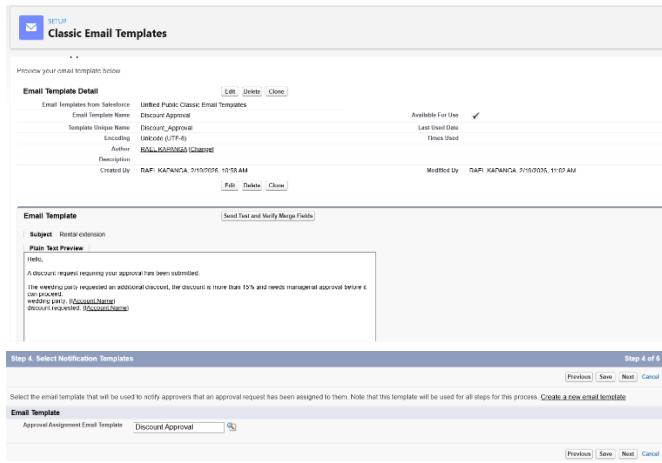


Step 2



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 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	Selected Fields
Account Number Account Record Type Account Site Account Source Active Annual Revenue Billing Address Brdr Name Brdr Suffix Created By Customer Priority D&B Company Data.com Key Description	Account Name Account Record Type Account Site Discount Approval Status Discount Percentage

Add Remove Up Down Click here to view an example

Step 4

Initial Submitters

Submitter Type: Search: Owner Find

Available Submitters	Allowed Submitters
-None-	Account Owner Record Creator

Add Remove

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 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	Read/Edit	Read	Read
Contact	Read/Edit/Delete	Read	Read/Edit	Read	Read
Rental (Custom)	Read/Edit/Delete	Read	Read/Edit	Read	Read
Product	Read/Edit		Read/Edit	Read	Read
Price Book	Read/Edit		Read/Edit	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' section in the Salesforce Setup. It lists several custom objects and their permissions across different categories:

Object	Data Share Definitions	Data Share Sagemaker Connections	Data Share Snowflake Connections	Data Share Targets	Data Share Target Connection	Work Plan Templates	Work Step Templates	Work Types	Work Type Groups
Rentals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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"/>						

- Standard object permission on the CEO profile

Object	Contacts	Accounts	Products	Price Books
Contacts	<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"/>
Products	<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"/>

- Custom object permission on the manager profile

The screenshot shows the 'Custom Object Permissions' section in the Salesforce Setup. It lists several standard objects and their permissions across different categories:

Object	Data Share Definitions	Data Share Sagemaker Connections	Data Share Snowflake Connections	Data Share Targets	Data Share Target Connection	Work Plan Templates	Work Step Templates	Work Types	Work Type Groups
Rentals	<input checked="" type="checkbox"/>								

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 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 Manager profile

Object	Accounts	Contacts	Products
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<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"/>

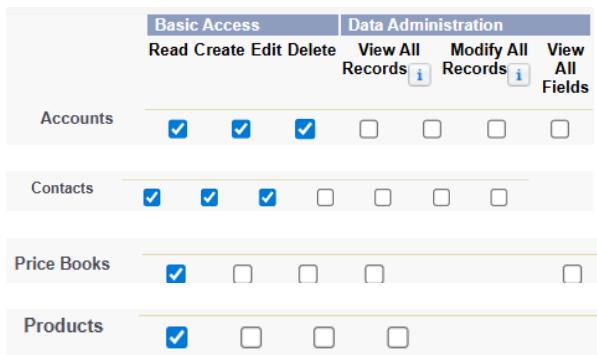


- custom object permissions on the sales profile

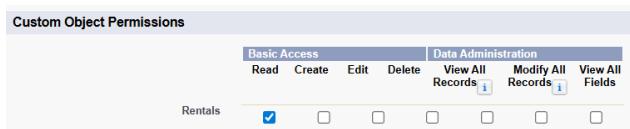


The sales person can only read create and edit records that belongs to them

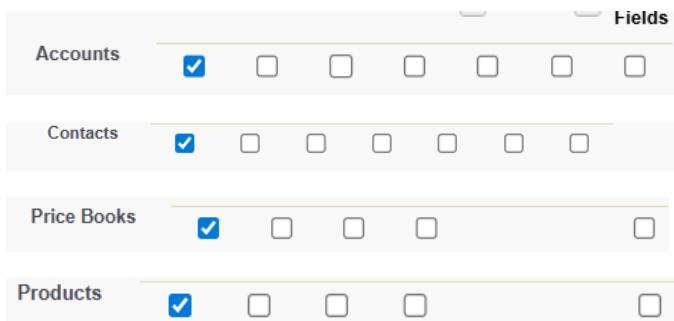
- Standard object permissions on the sales profile



- custom object permissions on the marketing profile



- Standard object permissions on the marketing profile



- Custom object permissions on the customer service profile

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

Rentals

- Standard object permissions on the customer service profile

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

Step 1: Rule Name
Label: Share Accounts with Market
Rule Name: Share_Accounts_with_Mar [i]
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 [i] sales rep

Step 4: Select the users to share with
Share with: Roles [i] 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

Step 1: Rule Name
Label: Share Accounts with Cust
Rule Name: Share_Accounts_with_Cust [i]
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 [i] sales rep

Step 4: Select the users to share with
Share with: Roles and Internal Subordinates [i] 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			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

