Example 1

PTO Requests

Most companies require employees to file a PTO (Paid Time Off) request and have their manager approve it. In three phases, here's how to automate a simple one-step PTO request process using Salesforce.

Before creating the approval process:

* Create a custom object to track your PTO requests, and tab called PTO Requests. Add the appropriate fields for your PTO Requests such as Start Date, End Date, and Employee Name.
* Create an email template to notify approvers about a pending approval request. To direct users to the approval page in Salesforce, include approval process merge fields.

Create the Approval Process

Use the jump start wizard to create an approval process for the PTO Request custom object and specify the following:

* Select the email template you created for this approval process.
* Don't specify filter criteria. That way, PTO requests are included in this approval process regardless of their attributes.
* Select the Automatically assign an approver using a standard or custom hierarchy field option, then choose Manager.
* The jump start wizard automatically chooses the record owner as the only person who can submit PTO requests.

TIP To let the submitter withdraw a submitted PTO request:

1. Click **Edit** and choose **Initial Submitters**.
2. Select Allow submitters to recall approval requests.

Wrap Things Up

* After you created the approval process, add the Approval History related list to the PTO Request object page layout.
* Consider adding the Items To Approved related list to your custom home page layouts. The related list shows users all approval requests that are waiting for their response.
* If you have a sandbox, test the approval process, then activate it.

# Example 2 - Expense Reports

If your company requires that employees file expense reports for managers to approve, you can automate this process in Salesforce.

Use this example to create a two-step expense report approval process for all employees in your headquarters office. It specifies that expenses less than $50 are automatically approved, expenses $50 and over require manager approval, and expenses over $5,000 require additional approval from two VPs. This example highlights a parallel approval process and the “else” option.

Before creating the approval process:

* create a custom object and tab called Expense Reports. Add the appropriate fields such as Amount, Description, Status, Start Date, and End Date.
* Create a custom field on the user object called Office Location. Assign the “HQ” value to users in the headquarters office location.

Create the Approval Process

Create an approval process using the Expense Report custom object and specify the following:

* The filter criteria for this approval process is Current User: Office Location equals HQ. Records must meet this criteria before they can be submitted to this approval process.
* Choose the Manager field as the next automated approver.
* Create an email template to notify approvers that their approval is requested. To direct users to the approval page in Salesforce, include approval process merge fields.
* Choose the record owner or any other user who you want to be able to submit expense reports.
* Create two approval steps:
  1. Create a step named Step 1: Manager Approval with the following specifications:
     + Name this step Step 1: Manager Approval.
     + Select Enter this step if the following and choose **criteria are met**. Also, choose **approve record** for the else option.
     + Set the filter criteria to: Expense: Amount greater or equal 50.
     + In the Automatically assign to approver(s) option, select the manager of the user submitting the request.
     + If appropriate, choose The approver's delegate may also approve this request if you want to allow the user in the Delegated Approver field to approve requests.
  2. Create a second approval step named Step 2: Multiple VP Approval and specify the following:
     + Use the filter criteria Expense Amount greater or equal 5000.
     + Choose Automatically assign to approver(s) and select two users with a VP role.
     + Select the Require UNANIMOUS approval from all selected approvers option. The request isn’t approved unless both designated users approve.
     + If appropriate, choose The approver's delegate may also approve this request if you want to allow the user in the Delegated Approver field to approve requests.
     + Choose Perform ONLY the rejection actions for this step... so that the request returns to the manager for changes if one of the VPs rejects the request.

TIP Consider creating the following final approval actions:

* Define a field update to automatically change the Status field to “Approved.”
* Send an approval notification to the user who submitted the expense report.
* To print a reimbursement check, send an outbound message to your back-office financial system.
* After you created the approval process, add the Approval History related list to the Expense Report object page layout.
* Consider adding the Items To Approved related list to your custom home page layouts. The related list shows users all approval requests that are waiting for their response.
* If you have a sandbox, test the approval process, then activate it.

# Example 3 - Discounting Opportunities

Opportunities that are discounted more than 40% require a CEO approval. Use this example to create a one-step approval process.

Before creating the approval process:

* Create an email template to notify approvers about a pending approval request. To direct users to the approval page in Salesforce, include approval process merge fields.
* Create the following custom fields for opportunities:
  + A percent field called Discount Percent so that users can enter a percentage discount.
  + A checkbox field called Discount Approved to indicate whether the CEO approved the discount.

Create the Approval Process

Create an approval process on the Opportunity object and specify the following:

* The filter criteria for this approval process is Discount Percent greater or equal 0.4. Records must meet this criteria before they can be submitted to this approval process.
* You don't need to choose a custom field as the next automated approver because you specify later that the CEO must approve all requests.
* Select the email template you created for this approval process.
* Choose the record owner as the only user who can submit a discount request for approval.
* Create one approval step with no filter criteria since all records submitted need to be approved or rejected.
* Choose Automatically assign to approver(s) and select the name of your CEO.
* If appropriate, choose The approver's delegate may also approve this request if you want to allow the user in the Delegated Approver field to approve requests.
* Consider creating the following final approval actions:
  + Email alert to notify the user who submitted the discount request.
  + Field update to automatically select the opportunity Discount Approved checkbox.
* After you created the approval process, add the Approval History related list to the appropriate opportunity page layouts.
* Consider adding the Items To Approved related list to your custom home page layouts. The related list shows users all approval requests that are waiting for their response.
* If you have a sandbox, test the approval process, then activate it.

# Example 4 - Job Candidates

When your company interviews candidates for a position, you may have several levels of approval before you can send an offer letter. Use this example to create a three-step approval process that requires approval from multiple management levels.

Prep Your Organization

Before creating the approval process:

* If you don't yet have a custom object to track candidates, create a custom object and tab called Candidates. Add the appropriate fields such as Salary, Offer Extended (checkbox), and Date of Hire.
* Create an email template to notify approvers about a pending approval request. To direct users to the approval page in Salesforce, include approval process merge fields.

Create the Approval Process

Create an approval process on the Candidate custom object using the following specifications:

* Don't enter filter criteria because you want all submitted offers to be approved.
* Choose the Manager field as the next automated approver.
* Select the email template you created for this approval process.
* Choose the record owner or any other user that you want to be able to submit offer letters.
* Create three approval steps:
  1. Create a step named Step 1: Manager Approval:
     + No filter is necessary as you want all records to advance to this step.
     + In the Automatically assign to approver(s) option, select the manager of the user submitting the request.
     + If appropriate, choose The approver's delegate may also approve this request if you want to allow the user in the Delegated Approver field to approve requests.
  2. Create a second step named Step 2: VP Approval:
     + No filter is necessary as you want all records to advance to this step.
     + Choose Let the user choose the approver to allow the manager to select the appropriate VP to approve the request.
     + If appropriate, choose The approver's delegate may also approve this request if you want to allow the user in the Delegated Approver field to approve requests.
     + Choose Perform ONLY the rejection actions for this step... so that the request returns to the manager for changes if the VP rejects the request.
  3. Create a third step named Step 3: CFO Approval:
     + No filter is necessary as you want all records to advance to this step.
     + Choose Automatically assign to approver(s) and select the name of your CFO.
     + If appropriate, choose The approver's delegate may also approve this request if you want to allow the user in the Delegated Approver field to approve requests.
     + Choose Perform all rejection actions for this step AND all final rejection actions. (Final Rejection) so that offer letters rejected by your CFO are completely rejected.

TIP

* Consider creating the following final approval actions:
  + Email alert to notify the user who submitted the offer letter request.
  + Field update to select the Offer Extended checkbox.
* Consider creating the following final rejection actions:
  + Email alert to notify the manager that the offer won't be extended.
* After you created the approval process, add the Approval History related list to the Candidates object page layout.
* Consider adding the Items To Approved related list to your custom home page layouts. The related list shows users all approval requests that are waiting for their response.
* If you have a sandbox, test the approval process, then activate it.