

Date: 06/07/2023

NAME: SHAHIKUMAR REDDY

Task: Create the approval process for different scenario.

Step1:

Create a custom profile name ABC and attach that to all the users:

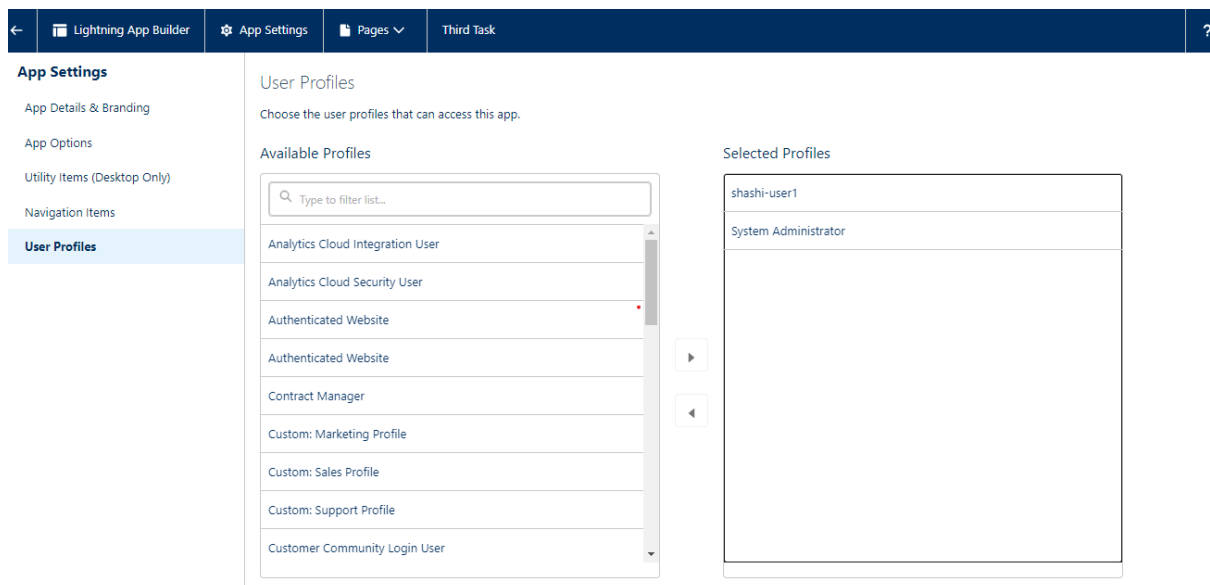
Create 3 users named.

User1approver.

User2Approver.

User3Approver.

Then go to the app manager and in user profiles enter the profile:



Step2:

Create a field:

1. Checkbox datatype (amount to be entered)
2. Number datatype (amount)

Step3:

Go to the approval process and create the approval process named as **Submit for approval**.

The screenshot shows the 'Approval Processes' setup interface. At the top, there's a 'SETUP' tab and the title 'Approval Processes'. Below this, a blue header bar indicates 'Step 2. Specify Entry Criteria' and 'Step 2 of 6'. Navigation buttons 'Previous', 'Save', 'Next', and 'Cancel' are on the right. A note states: '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.'

The main section is titled 'Specify Entry Criteria'. It contains a dropdown menu with the text 'Use this approval process if the following' and a selected option 'criteria are met'. Below this is a table with three columns: 'Field', 'Operator', and 'Value'. The first row is populated with 'Plan: Enter the amount', 'equals', and 'True'. The subsequent four rows are empty, each starting with '--None--' in the 'Field' column. To the right of the table, there are 'AND' labels for each row. At the bottom left of the table area is a link 'Add Filter Logic...'. At the bottom right are the 'Previous', 'Save', 'Next', and 'Cancel' buttons.

Field	Operator	Value
Plan: Enter the amount	equals	True
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

Then allocate three users' requirement:


User1 → amount <100000

User2 → amount ≥100000








User3 → amount >200000

Step4:

Create a record name as test1:



Q Search...






Third TaskProjectPlanPlan Line Item

PlanTest-1

New ContactEditNew Opportunity

RelatedDetails

Plan Name	Owner
Test-1	 Shashikumar Reddy
Project	Number-of-Days
Start Date	
06/07/2023	
End Date	
31/07/2023	
Formula-date	
-5.00	
Enter the amount	
<input checked="" type="checkbox"/>	
Amount	
6,00,000.00	
Created By	Last Modified By
 Shashikumar Reddy, 06/07/2023, 5:16 pm	 Shashikumar Reddy, 06/07/2023, 5:16 pm

New ContactEditNew Opportunity

New Case

New Lead

Delete

Clone

Change Owner

Printable View

Sharing

Sharing Hierarchy

Submit for Approval


Item



Plan was submitted for approval.



Step5:

<div> Approval History (2)</div> <div><div>Approve</div><div>Reject</div><div>▼</div></div>			
Step Name	Date	Status	Assigned To
user1	06/07/2023, 5:17 pm	Pending	user1 approver ▼
Approval Request Submitted	06/07/2023, 5:17 pm	Submitted	Shashikumar Reddy ▼
View All			

Approve it.

user1	•	06/07/2023, 5:32 pm	Approved	user1 approver ▼
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