

Date:07/07/2023

Name: Shashikumar Reddy


Step1:

Create three classic email templates.

1. Pending Status
2. Approved
3. Rejected

Step2:

- Then go to the Approval Process:
- Attach the Pending status email template to Initial Submission Actions.
- Attach the Approved status email template to Final Approval Actions.
- Attach the Rejected status email template to Final Rejection Actions.



Plan
Shashi

Related

Details

Plan Name
 Shashi

Project


Start Date

End Date


Formula-date
 -6.00


Enter the amount
☒

Amount
 20,000.00


Owner

[Shashikumar Reddy](#)

Number-of-Days

Created By

[Shashikumar Reddy](#), 07/07/2023, 5:04 pm

Last Modified By

[Shashikumar Reddy](#), 07/07/2023, 5:04 pm

Approval Process Screenshot:



SETUP
Approval Processes

Record Lock
 Lock the record from being edited

[Edit](#) | [Remove](#)
Email Alert
 Pending

Approval Steps ⓘ

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	user1		(Plan: Amount LESS THAN 100000) AND (Plan: Amount GREATER THAN 1000) , else Next Step	User:user1 approver	Final Rejection
Show Actions Edit	2	user2		(Plan: Amount GREATER THAN 100000) AND (Plan: Amount LESS OR EQUAL 200000) , else Next Step	User:user2 approver	Final Rejection
Show Actions Edit	3	user3		Plan: Amount GREATER THAN 200000	User:user3 approver	Final Rejection

Final Approval Actions ⓘ

[Add Existing](#)
[Add New](#)

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Approved

Final Rejection Actions ⓘ

[Add Existing](#)
[Add New](#)

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Rejected

Pending Status Mail:



Pending status Inbox x



Shashikumar Reddy shashikumarreddy0443@gmail.com [via](#) perkjuz416jbyt.2t-oozyeai.ap12.bnc.salesforce.com
to shashikumarreddy0443@gmail.com, me ▾

Hi shashikumar ,

Your approval status has been sent please wait patiently.

↩ Reply

↩ Reply to all

➦ Forward

Approved Application:



1 of 3,924 < >

Approval Request Inbox x



Shashikumar Reddy shashikumarreddy0443@gmail.com [via](#) 8secrsowj1lc.2t-oozyeai.ap12.bnc.salesforce.com
to me ▾

17:07 (0 minutes ago) ☆ ↩ ⋮

Shashikumar Reddy has requested your approval for the following item: <https://protiviti09-dev-ed.develop.my.salesforce.com/c/process/ProcessInstanceWorkItemWizardStageManager?id=042t000007IPTx>

Please click this link to approve or reject this record.

Thank you,
Salesforce

Third Task

Project

Plan

Plan Line Item

Plan

Shashi-Rejected

Plan was rejected.

Shashi-Rejected

Shashi-Rejected

Shashi-Rejected

Shashi-Rejected

Shashi-Rejected

Shashi-Rejected

View All

Approval History (2)

Step Name	Date	Status	Assigned To
user1	07/07/2023, 5:14 pm	Rejected	user1 approver
Approval Request Submitted	07/07/2023, 5:14 pm	Submitted	Shashikumar Reddy
View All			

Rejected Application:

Rejected

Inbox x

Shashikumar Reddy

shashikumarreddy0443@gmail.com via jtekr8lv1re.2t-oozyeai.ap12.bnc.salesforce.com to shashikumarreddy0443@gmail.com, me

Hi Shashi-Rejected ,

Your application is Rejected.