

# **APPROVAL PROCESS ASSIGNMENT**

1. A text email template with details of the account is provided when the account is created and a description of total balance in account and also a greeting message.
2. A description of account transactions must be provided after every month which includes all the transactions related to that account in last 30 days.(It includes total no of transactions, deposits, withdraws etc.).
3. Pre-defined value is the value that you can decide for account (same for all types) For-example if total deposits are more than 1 lakh Rupees than it is taken into consideration.
4. If an account exceeds its pre-defined value then a mail is send to account holder that his account has exceeded the pre-defined limit.
5. You have to create a field on account named as Priority and it should contain three values i.e. low, medium and high.
6. If an account is created and that account has deposits more than pre-defined value so for them priority field must be set to High.
7. Also assign the Manager as the default rule owner.
8. As of now the accounts are created so now if an account holder deposits more than the amount pre-defined for account then it must be verified by the manager only.
9. The Approver must be chosen manually.
- 10.Only those account which have deposited amount greater then pre-defined values will go for verification not all the accounts.
- 11.You have to create a field on account named as Status and it should contain three values i.e. Initiating, Approved and Not-Approved.
- 12.When first the request is submitted the status must be set as Initiating.
- 13.If the manager accepts the request then the Status must be set as approved.
- 14.If the manager rejects the request then an email must be sent to the account holder and describe him the situation and set the status as Not-Approved.
- 15.If the manager is out for business and an urgent approval is needed than there must be CEO in the bank which will approve the request in the absence of manager (For this create a user and assign it as a CEO).

**Max Marks: 50**