Creating a Approval workflow

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Business Requirement

We want to have credit memos automatically go through a multi-step approval process.
The rules for the approval process are as follows –
all credit memos that are above 0 automatically enter the process.
The first step is to have the submitter’s manager approve or reject the credit memo.
If rejected, an email goes to the submitter and the record is flagged as ‘Rejected’.
If approved, the next approval stage is entered.
If the credit memo is greater than $5,000, then the approval goes up the chain of
management. If not, or if all approve, then the billing department have the final
approval/rejection step.

Basics

The Salesforce approval process can be confusing and difficult to step up without careful
planning. Salesforce provides an Approval Cheatsheet that includes several common
elements. It is available from the Salesforce Help system. The easiest way start planning
the process is simply draw out the flow of the process. This will allow you to visually
map the steps involved and how they are tied together. Here is the resulting flowchart.
Credit Amount entered (credit – rebill > 0)

Send email to mgr
Lock record
Status = 'Waiting for Approval'

Mgr Approve?
Yes
Status = 'Tier 1 approved'

Is credit > 5000?
Yes
Email to VP

VP Approve?
Yes
Status = 'Tier 2 - VP approved'

Is credit > 10000?
Yes
Email to SVP

SVP Approve?
Yes
Status = 'Tier 3 - SVP approved'
Send email to Billing

Billing Approve?
Yes
Status = 'Billing Approved'
Send email to Sales Order Specialist

Status = 'Not Approved'
Unlock record
Email to originator

No

No

No

No
Create Approval Process

Click **Setup** in the upper right menu. This will bring up the personal and app setup menu on the left side. Then select Create > Workflows & Approvals > Approval Processes. Then select the object you want to have the process applied to – here we are choosing a custom object ‘Credit Memo’.

Clicking the **Create New Approval Process** button will bring up 2 options

- **Use Jump Start Wizard**
- **Use Standard Setup Wizard**

Use Jump Start Wizard provides a quick way to set up the initial simple process. For this example we will choose the Standard Setup Wizard.

**Step 1 – Enter Name and description**

Enter a name for the approval process. This has to be unique within your organization. An important point to note is that once you create and activate the approval process, some...
features will not be editable and therefore you will need to recreate the process to make further adjustments. I have found that adding a version number (such as ‘v01’) at the end of the name allows me to keep track of adjustments to the process.

**Step 2 – Specify entry criteria**

Here you specify how a record will enter the approval process.

You can either select fields and their conditions or select ‘Formula evaluates to true’ to have more flexibility on your condition. We will just choose where the Credit Amount > 0.

**Step 3 – Specify Approver Field and Record Editability Properties**

Here we define who the actual approver will be. For this example, we choose the record owner’s manager.

One important point is that the manager has to be set up within the users profile (and this will be needed for all users of the process) unless you define custom hierarchy within your organization.

We also specify the both the administrator and the approver can edit the record. To everyone else, the record is locked down.
Step 4 – Specify Email Notification Template

This template will be sent at all approval steps. The template can take merged fields so relevant information can be shown.

Step 5 – Specify 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.

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

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.
**Create Approval Steps**

Now that we have the overall approval process created, we need to define the intermediate steps that will be involved. When you initially save the process, you are given the choice of going on next to create the first step or to go back to the process detail screen.

Let us go back to the detail screen.

### Step 1 – Manager Approval

Click ‘New Approval Step’

All records should enter this step

Let the Submitter’s manager approve/reject (also their delegate)
Let's create an approval action for this step – change the status to 'Tier I approval'

The next approval step should only be entered when the credit memo is greater than 5000 else it should go to the final step (billing).

**Step 2 – VP Approval**

Again click the ‘New Approval Step’
Again we define a field update

Step 3 – SVP Approval
The following approval step for SVP is essentially the same, except the condition upon which it will be entered is Credit amount > 10000 and the status is updated to Tier III approval.

Step 4 – Billing Approval
Now let’s define the final step – that Billing will approve/reject.
All records should enter this step

The approver will be the billing person
Notice that when the credit memo has been approved by the manager but is not greater than $5000 (or when it has been approved by the VP but is not greater than $10000) it does not go to the billing approval step.
We need to edit step 2 and step 3 to code for the ‘else’ condition.
Some final points –
When you activate an approval process, some of the items within each step become fixed even if there are no records associated with the process or if you deactivate the process. One of these is setting the else condition on an approval step.
This may seem like a hindrance but it is only a press of a button (Clone) to make a copy of the process. Once you have this new copy, you then have access to all the options.

The approval process is similar to the workflow process but many times more powerful. You can set field updates, send email and also generate outbound messages. These are powerful in that they allow your process to interface with your other business systems. So in this example, once approved, we could generate an outbound message to update our financial system.

With the addition of the APEX programming language, we have yet more power and flexibility over what our approval process can do. Once a field update occurs within our approval record, APEX trigger can be fired that can update or even create other types of records.