SAMPLE APPROVAL PROCESSES

Summary

Review samples of common approval processes to help you get started creating your own.

Review samples of common approval processes to help you get started creating your own.

Sample Approval Process: 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.

Prep Your Organization

Before creating the approval process:

- If you don't yet have a custom object to track your PTO requests, create a custom object 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.

Last updated: November 2, 2017

Sample Approval Process: 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.

Prep Your Organization

Before creating the approval process:

- If you do not yet have a custom object to track your expenses, 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.

Wrap Things Up

- 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.

Sample Approval Process: Discounting Opportunities

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

Prep Your Organization

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.

Wrap Things Up

- 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.

Sample Approval Process: 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.

Wrap Things Up

- 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.