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Getting Started with Approval Processes

Approval Process Checklist

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Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Plan each approval process carefully to ensure a successful implementation. Review the following checklist about preparing the appropriate information before creating your approval process.

- Prepare an approval request email template.
- Determine the approval request sender.
- Determine the assigned approver.
- Determine the delegated approver.
- Decide if your approval process needs a filter.
- Design initial submission actions.
- Decide if users can approve requests from a wireless device.
- Determine if users can edit records that are awaiting approval.
- Decide if records should be auto-approved or rejected.
- Determine how many levels your process has.
- Determine the actions when an approval request is approved or rejected.

What email template do you want to use for approval requests?

The email template you specify on an approval process is used when notifying users that an approval request is assigned to them. Salesforce offers a default email template, which you can modify, or you can create your own. Evaluate the default email template to see if it is appropriate for your approval process. If not, create your own email templates to use for your approval request notifications. Include the appropriate approval process merge fields to link directly to the approval request. For details about using merge fields, see About Merge Fields.

Determine who should be the sender of approval requests.

The approval request notifications are automatically sent from the user who submitted the record for approval. You have the option to assign a different return email address to these notifications. Determine what email address to use.

Who will be responsible for approving requests?

Requests can be approved or rejected by any of the following:

- A manually chosen user or queue
- A user or queue specified by the administrator
- A user listed in a custom hierarchy field on the user detail page

Each step in your approval process can assign approval requests using any of these options.
The option to use a custom hierarchy field allows you to assign approval requests to the submitter's manager. To do this, create a custom hierarchical relationship field on users called "Direct Manager" and store each user's manager in that field. Custom hierarchical relationship fields prevent you from selecting a user that directly or indirectly reports to itself.

Should approval requests be delegated to another user for approval?

An approval request can be approved by a designated delegate for the approver. However, you have the ability to disable this option. Determine if you want to allow delegated users to approve requests. Then, for each user, populate the `Delegated Approver` field on the user's detail page.

What records should be included in this process?

Determine what attributes a record must have to be included in your approval process. If necessary, create the custom fields to store this information so that you can use it in your filter criteria. For example, if you want to include expense records from your headquarters office only, create a custom picklist field called `Office Location` that has two options: "HQ" and "Field." Then, your filter criteria for the process would specify that records must have "HQ" in the `Office Location` field to be included.

What should occur when a record is first submitted for approval?

When users submit a record for approval, Salesforce automatically locks the record so that other users cannot change it while it is awaiting approval. Decide if you want other workflow actions to occur when a record is first submitted, such as alerts, tasks, field updates, and outbound messages. These actions belong on your list of Initial Submission Actions.

Should users be able to approve requests from a wireless device?

Determine if you want to require users to log in to Salesforce to approve requests. Alternatively, you can set up your approval process to allow users to approve requests remotely using a wireless browser.

Who can edit records that are awaiting approval?

Records submitted for approval are automatically locked. Users with the "Modify All Data" permission can always unlock a record and edit it. However, you may also specify that the currently assigned approver can edit the record as well.

Should records be automatically approved or rejected based on certain criteria?

You can set filter criteria in the first step of your process that automatically approves or rejects records. For example, all expenses submitted with an `Amount` less than $15 are automatically approved.

How many people need to approve these requests?

An approval process can have several layers of approvals. Determine how many users need to approve requests and in what order.

Should any actions take place when a request is approved or rejected?

You can set up to 40 additional actions to take place when a request is approved or rejected at each step, up to 10 of each of the following types:

Type	Description
Task	Assigns a task to a user you specify. You can specify the `Subject`, `Status`, `Priority`, and `Due Date` of the task.
Email	Uses an email template you specify to send an email to a designated recipient.
Field Update	Changes the value of a selected field. You can specify a value or create a formula for the new value.
Outbound Message	Sends a message to an endpoint you designate. You can also specify user name and the data you want included in the message.

Additionally, you can set up to 40 additional actions to take place when a record has received all necessary approvals or is completely rejected.