

Salesforce QRG: Time-Off Territory

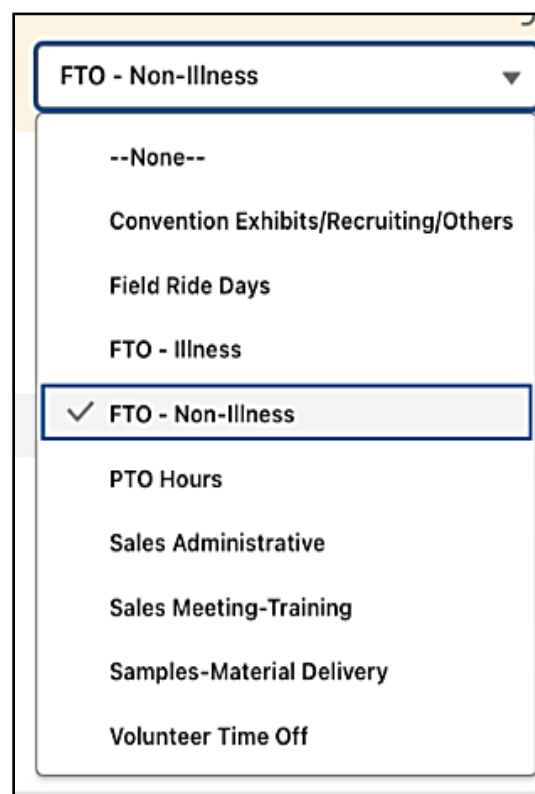
Updated Manager Approval Process

What's Changing?

- There's an updated Approval Process for managers approving Time Off Territory Requests (TOT).
 - For requests scheduled 1/1/25 and beyond, 3 reason codes will require a direct manager's approval:
 - Volunteer Time Off
 - FTO -Non-Illness
 - FTO-Illness

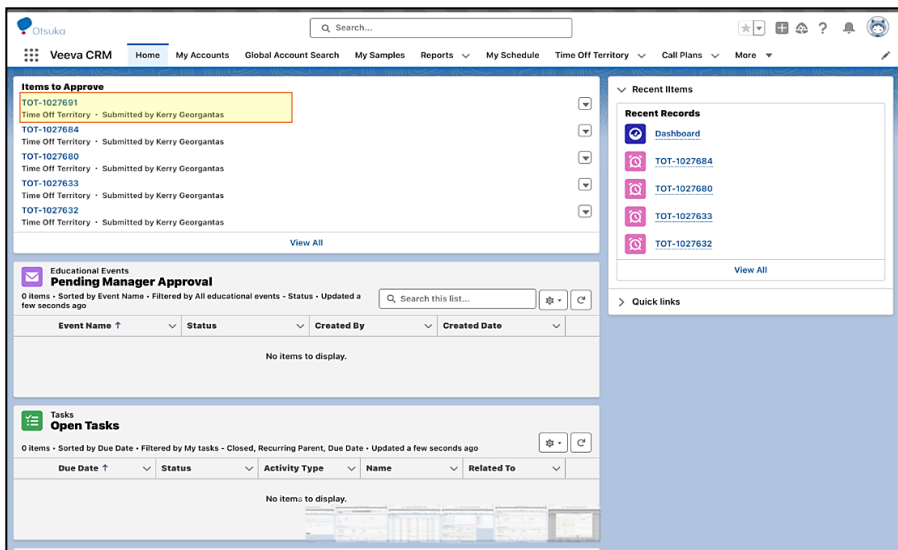
- The new drop-down Reason menu will be visible to the field on 12/16/24. (pictured on the right)
 - This provides HSAs with the option to send requests in advance for Time Off Territory starting 12/16/24 for reasons that require approval after the new policy and approval process begins on 1/1/25.

- FTO will replace PTO for requests scheduled after 1/1/25.
 - For additional information related to FTO, please refer to the [FTO FAQ](#) & [FTO Policy](#).
 - **PTO Days taken in 2024 must be recorded as PTO**, and it's recommended to record it promptly because the PTO button will be removed from the drop-down menu in early January.



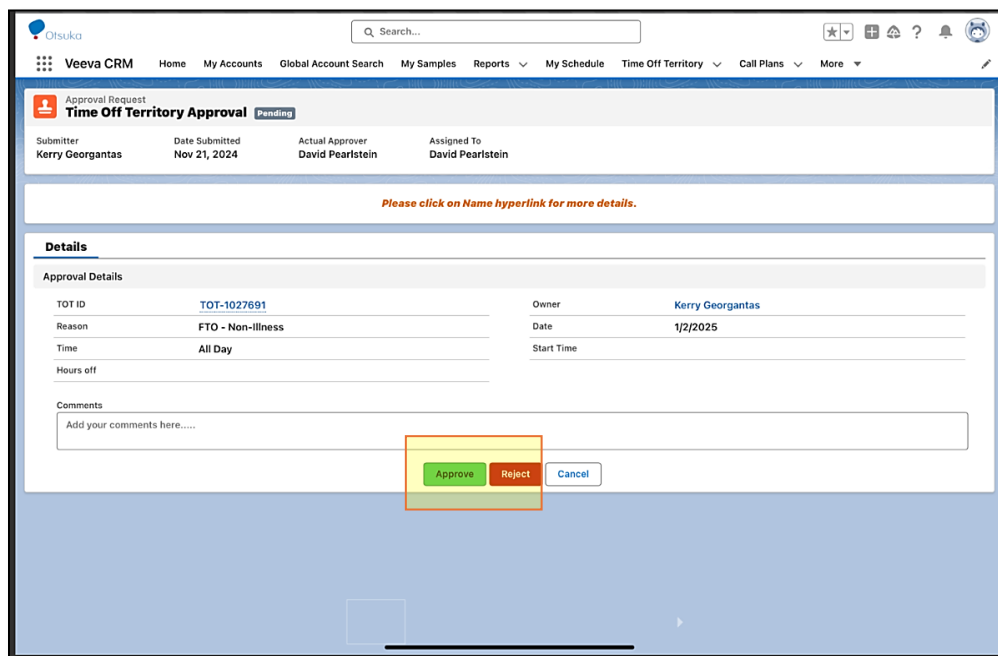
How to approve or deny a TOT request:

1. Time Off Territory (TOT) Requests will trigger an email notification that's sent to the direct manager. Managers may also proactively check for requests on their [Salesforce](#) homepage under "Items to Approve".
2. Click the [blue hyperlinked Time Off Territory](#) request to open the Approval Request window.



Best Practice: Look out for email notifications with the subject line: "Time Off Territory Approval Request". The email contains a hyperlink, which opens the Approval Request window directly to the pending request that requires a response.

3. Once the Approval Request window is open, select "Approve" or "Reject" to respond to the request.
4. A space above the Approve/Reject buttons is provided if comments regarding the request need to be added.



Where can HSAs view the status of TOT requests?

1. The status of all **Time Off Territory** Requests may be viewed on the Salesforce Home Page.
2. All requests are listed under the **Time Off Territory** tab.
3. The **blue hyperlinked** requests may be selected to open the details and status of the request.

TOT ID	Date	Reason	Time	Hours	Status	Created By	
1	TOT-1027691	1/2/2025	FTO - Non-illness	All Day	8	Approved	Kerry Georgantas
2	TOT-1027686	1/22/2025	FTO - Illness	All Day	8	Rejected	Kerry Georgantas
3	TOT-1027687	1/24/2025	Volunteer Time Off	All Day	8	Approved	Kerry Georgantas
4	TOT-1027684	2/4/2025	FTO - Non-illness	PM Off	4	Pending	Kerry Georgantas
5	TOT-1027680	11/21/2024	Volunteer Time Off	AM Off	4	Pending	Kerry Georgantas
6	TOT-1027633	1/8/2025	FTO - Illness	AM Off	4	Pending	Kerry Georgantas
7	TOT-1027671	1/10/2025	Volunteer Time Off	All Day	8	Approved	Kerry Georgantas
8	TOT-1027670	11/28/2024	PTO Hours	All Day	8	Approved	Kerry Georgantas
9	TOT-1027669	11/21/2024	Convention Exhibits/Recruiting/Others	All Day	8	Approved	Kerry Georgantas
10	TOT-1027668	2/5/2025	FTO - Illness	All Day	8	Approved	Kerry Georgantas
11	TOT-1027667	1/15/2025	FTO - Non-illness	All Day	8	Rejected	Kerry Georgantas
12	TOT-1027632	1/9/2025	FTO - Non-illness	All Day	8	Pending	Kerry Georgantas
13	TOT-1027631	1/8/2025	FTO - Illness	All Day	8	Pending	Kerry Georgantas
14	TOT-1027629	2/1/2025	FTO - Non-illness	All Day	8	Pending	Kerry Georgantas
15	TOT-1027628	1/30/2025	FTO - Illness	All Day	8	Pending	Kerry Georgantas
16	TOT-1027627	11/28/2024	PTO Hours	All Day	8	Approved	Kerry Georgantas
17	TOT-1027626	1/23/2025	Convention Exhibits/Recruiting/Others	All Day	8	Approved	Kerry Georgantas

Record Approved

Time Off Territory
TOT-1027691

Details

Reason	FTO - Non-illness	Owner	Kerry Georgantas
Date	1/2/2025	Territories	;OCAD1071A;
Time	All Day		

Hourly Options

Start Time		Employee Number	4810
Hours off			

Time Off Territory History (4)

Date	Field	User	Original ...	New Value
11/21/2024, 10:52 PM	Record locked.	David Pearlstein		
11/21/2024, 10:45 PM	Record locked.	Kerry Georgantas		
11/21/2024, 10:45 PM	Created.	Kerry Georgantas		

Please note: The Reason codes have been updated to reflect the updated process for future time off territory requests scheduled after 1/1/25 25. However, the process for inputting Time Off Territory **remains the same**. HSAs will continue submitting requests through Salesforce Online or directly in the VEEVA CRM app.