

**Project Name:- Build An Employee Travel Approval  
Application For Corporates - (Developer)**

Team ID : LTVIP2024TMID12769

Team Leader : H E HEMANTH

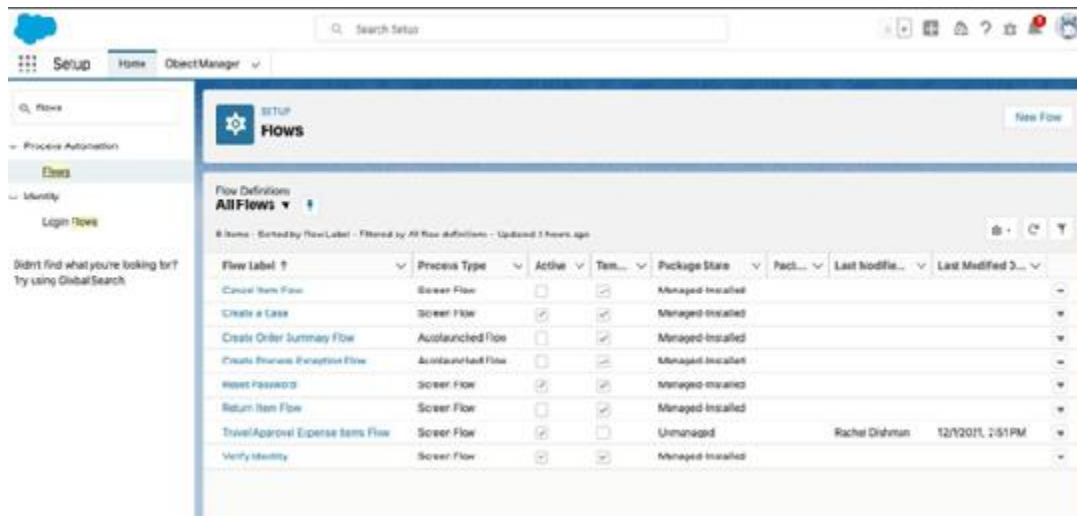
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# Flows

## Create A Flow

Now, create a flow that uses the update record node to set the out-of-state flag.

1. From Setup, click the Home tab.
2. Select Process Automation | Flows (or use the Quick Find and search for flows)



3. Click New Flow.
4. Select Record-Triggered Flow then click Create.
5. Enter these values:

Parameter	Value
Object	Travel Approval
Configure Trigger	Trigger the flow when: <b>A record is created or updated</b>
Condition Requirements	None
Optimize the Flow For:	Fast Field Updates

The Configure Start screen should look like this:

SETUP > OBJECT MANAGER

## Travel Approval

Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules  
Triggers  
Flow Triggers  
**Validation Rules**

### Details

Edit Delete

Description

API Name: Travel\_Approval\_\_c

Custom: ☒

Singular Label: Travel Approval

Plural Label: Travel Approvals

Enable Reports: ☒

Track Activities: ☐

Track Field History: ☐

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

## Configure Start

### Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object

Travel Approval

### Configure Trigger

\* Trigger the Flow When:

- ☐ A record is created  
☐ A record is updated  
☒ A record is created or updated  
☐ A record is deleted

### Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

\* Optimize the Flow for:

#### Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

#### Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed.

Cancel

Done

1. Click Done.

Freeform
Run
Debug
Activate
Save As
Save

Auto-Layout
Freeform

Start  
Record-Triggered Flow

Object: Travel Approval  
Trigger: A record is created or updated  
Optimize for: Fast Field Updates  
Open Flow Trigger Explorer for Travel ...

7. In the Layout dropdown, select Freeform.

## Add a Decision Element

1. From the left-hand toolbox column, drag a Decision element onto the flow builder screen.
2. Set the following parameters:

Parameter	Value
Label	Is Travel Out of State?
API Name	Is_Travel_Out_of_State (This automatically gets set when you tab out of the Label field)
Description	Leave blank

3. Set the Outcomes.
4. For the first outcome, set these parameters:

Parameter	Value
Label	Yes Out of State
Outcome API Name	Yes_Out_of_State (This automatically gets set when you tab out of the Label field)
Condition Requirements to Execute Outcome	All Conditions Are Met (AND)
Resource	SRecord > Destination State
Operator	Does Not Equal
Value	TX
When to Execute the Outcome	Only if the record that triggered the flow to run is updated to meet the condition requirements

Your Edit Decision Screen should look like this:

Edit Decision

**Is Travel Out of State?** (Is\_Travel\_Out\_of\_State)

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER  +	OUTCOME DETAILS	<a href="#">Delete Outcome</a>
<div>Yes Out of State</div> <div>In State</div> <div>Default Outcome</div>	<div>*Label Yes Out of State</div> <div>*Outcome API Name Yes_Out_of_State</div> <div>Condition Requirements to Execute Outcome All Conditions Are Met (AND)</div> <div> <div>Resource A3 \$Record &gt; Destination State X</div> <div>Operator Does Not Equal</div> <div>Value TX</div> </div> <div>+ Add Condition</div> <div>When to Execute Outcome </div> <div> <input type="radio"/> If the condition requirements are met  <input checked="" type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements         </div>	<a href="#">Delete Outcome</a>

[Cancel](#) [Done](#)

5. Next to Outcome Order click the + button to add another outcome.

6. Set these parameters:

Parameter	Value
Label	In State
Outcome API Name	In_State (This automatically gets set when you tab out of the Label field)
Condition Requirements to Execute Outcome	All Conditions Are Met (AND)
Resource	\$Record > Destination State
Operator	Equals
Value	TX
When to Execute Outcome	Only if the record that triggered the flow to run is updated to meet the condition requirements

7. Click Done.

Edit Decision

**Is Travel Out of State?** (Is\_Travel\_Out\_of\_State)

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER  +	OUTCOME DETAILS	<a href="#">Delete Outcome</a>
<div>Yes Out of State</div> <div>In State</div> <div>Default Outcome</div>	<div>*Label In State</div> <div>*Outcome API Name In_State</div> <div>Condition Requirements to Execute Outcome All Conditions Are Met (AND)</div> <div> <div>Resource A3 \$Record &gt; Destination State X</div> <div>Operator Equals</div> <div>Value TX</div> </div> <div>+ Add Condition</div> <div>When to Execute Outcome </div> <div> <input type="radio"/> If the condition requirements are met  <input checked="" type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements         </div>	<a href="#">Delete Outcome</a>

[Cancel](#) [Done](#)

8. Drag the white circle from the Start Flow element to the Decision element you just created to link the direction of the arrow.



Create an Action for the Flow Using Update Records Elements

1. From the left-hand column, the flow toolbox, drag an Update Records element onto the flow screen.
2. Set the parameters for the element:

Parameter	Value
Label	Update Travel Approval Record
Outcome API Name	Update_Travel_Approval_Record (This automatically gets set when you tab out of the Label field)
How to find Records to Update and Set their Values	Use the travel approval record that triggered the flow
Condition Requirements to Update the Record	None—Always Update the Record
Field	Out_of_State__c
Value	\$GlobalConstant.True (start typing True and this value will come up)

Your Update Record Screen should look like this:

## Edit Update Records

### Update Travel Approval Record (Update\_Travel\_Approval\_Record)

#### • How to Find Records to Update and Set Their Values

- ☒ Use the travel approval record that triggered the flow
- ☐ Use the IDs and all field values from a record or record collection
- ☐ Specify conditions to identify records, and set fields individually



Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

### Set Field Values for the Travel Approval Record

Field

Out\_of\_State\_\_c

Value

←  True X

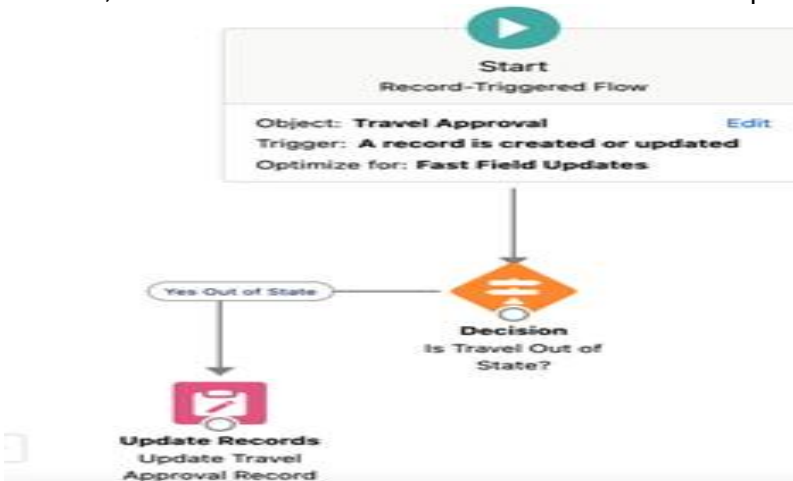


Cancel

Done

3. Click Done.

4. Drag the white circle from the Decision Node to the Update Records you just created, and select the decision Yes Out of State | Done.



To save time, you can simply duplicate the Update Records element you just created and update the criteria.

5. Click the Update Records node and make sure it is highlighted in blue. In the top-left corner of the Flow Builder screen, find the and click the duplicate button Duplicate button. Double-click on the new Update Records element just created. Note the API name has been automatically updated to Update\_Travel\_Approval\_Record\_0.

6. Then update the Value of the Out\_of\_State\_\_c field to FALSE.

7. Delete the True Value and enter False. Select \$GlobalConstant.False.

## Edit Update Records

**Update Travel Approval Record** (Update\_Travel\_Approval\_Record\_0) 

### • How to Find Records to Update and Set Their Values

- ☒ Use the travel approval record that triggered the flow
- ☐ Use the IDs and all field values from a record or record collection
- ☐ Specify conditions to identify records, and set fields individually



Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record 

### Set Field Values for the Travel Approval Record

Field

Out\_of\_State\_\_c

Value

←  False 

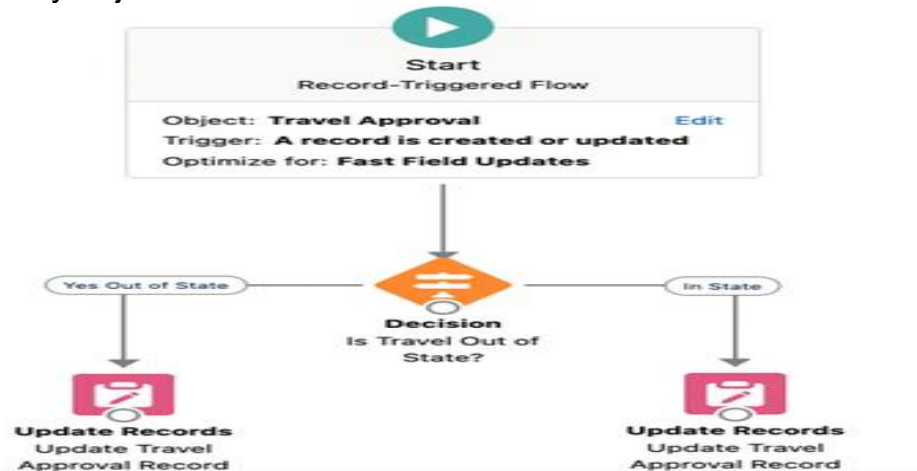


Cancel

Done

2. Click Done.

9. Drag the white circle from the Decision Node to the second Update Records you just created and select the decision In State.



1. Click Save.

2. Flow Label: Out of State Travel Flag. Flow API Name will auto populate to Out\_of\_State\_Travel\_Flag. Leave Description blank and advanced settings as is.

3. Click Save.

4. Click Activate.

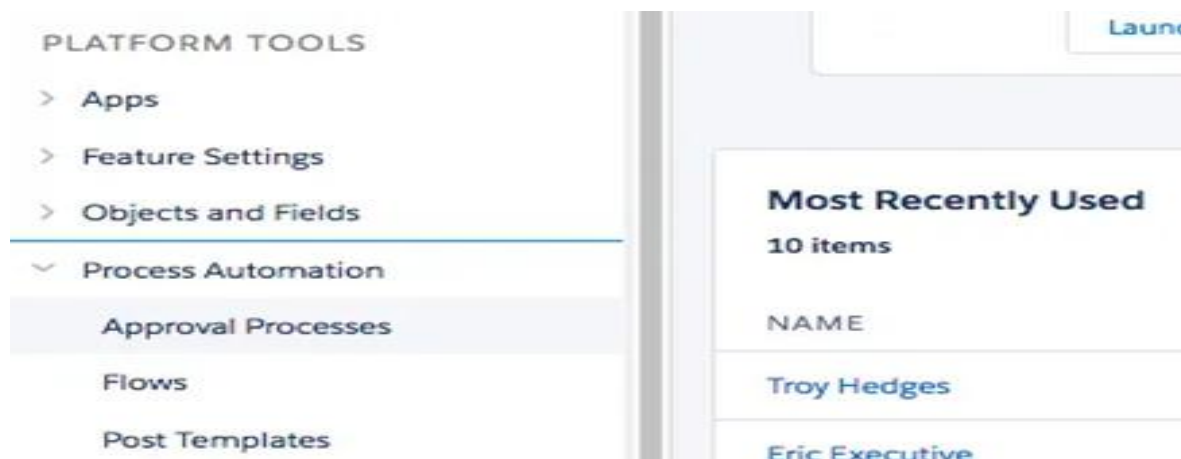


# Approval Process

## Create A Approval Process

Let's get started.

1. Click and select Setup.
2. Select Process Automation | Approval Processes (or use the Quick Find and search for Approval Processes).



3. In the Manage Approval Processes For list, select Travel Approval.
4. Click Create New Approval Process and select Use Jump Start Wizard.



5. Enter the following parameters

Parameter	Value
Name	Travel Approval Request
Unique Name	Travel_Approval_Request (This automatically gets sent when you tab out of the Name field)
Approval Assignment Email Template	Leave blank
Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts	Leave this selected/checked
Use Approver Field of Travel Approval Owner	Leave unselected/unchecked.
Specify Entry Criteria	Use this approval process if the following: <b>criteria are met</b>
Field	Travel Approval: Total Expenses
Operator	greater than
Value	0
Select Approver	<ul style="list-style-type: none"> <li>Automatically assign an approver using a standard or custom hierarchy field</li> <li>Select <b>Manager</b> from the option list</li> </ul>

6. Click Save.

7. Click View Approval Process Detail Page.

### Create an Approval Step for Out-of-State Travel

Now, let's create another approval step to send out-of-state travel to a travel coordinator.

1. Click New Approval Step.

2. Enter the following details

Parameter	Value
Name	Travel Coordinator Approval
Unique Name	Travel_Coordinator_Approval (This automatically gets set when you tab out of the Name field)
Step Number	2

3. Click Next.

4. Ensure Enter this step if the following is selected and the criteria are met option is selected.

5. Enter the following formula criteria

Field: Travel Approval: Out-of-State

Operator: equals

Value: True

6. Click Next.

7. Select the Automatically assign to the approver(s) option.

8. Select User from the dropdown and select your name as the travel coordinator.  
NOTE: In the real world, a user would not be selected as an approver of their own request. Salesforce demo orgs are limited to two Salesforce users. For this project, just use your user account for the travel coordinator.
9. Click Save.
10. Select No, I'll do this later. Take me to the approval process detail page to review what I've created and then click Go!

## Add Logic

Next, add logic to set the status of the approval request based on if it was Approved or Rejected. We do this by creating a Final Approval action and a Final Rejection action. Let's start by creating an action if the request was approved by all approvers.

- Click Add New in the Final Approval Actions area of the approval process form.
- Select Field Update from the dropdown list.

The screenshot shows the Salesforce Approval Process configuration page. At the top, the 'Approval Steps' table lists two steps: 'Step 1' and 'Travel Coordinator Approval'. Below this, the 'Final Approval Actions' section is active, showing a table with columns for 'Action', 'Type', 'Description', and 'Criteria'. An 'Add New' dropdown menu is open, displaying options: 'Task', 'Email Alert', 'Field Update', and 'Outbound Message'. The 'Field Update' option is highlighted. Below this, the 'Final Rejection Actions' section is also visible, with an 'Add New' dropdown menu.

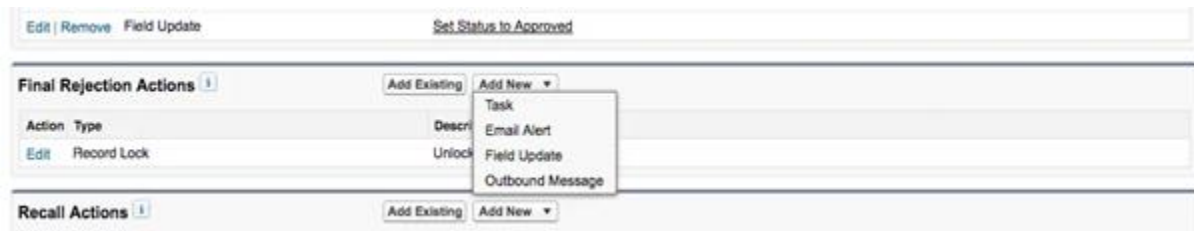
3. Enter the following values.

Parameter	Value
Name	Set Status to Approved
Unique Name	Set_Status_to_Approved (This automatically gets sent when you tab out of the Name field)
Field to Update	Status
Re-evaluate Workflow Rules after Field Change	Leave unchecked
Picklist Options	Select A specific value and select Approved from the dropdown list.

4. Click Save.

Next, let's set the status value to Rejected if any approver rejects the travel approval request.

1. Click Add New in the Final Rejection Actions area of the approval process form.
2. Select Field Update from the dropdown list.



The screenshot shows the 'Final Rejection Actions' section of an approval process form. At the top, there are links for 'Edit', 'Remove', 'Field Update', and 'Set Status to Approved'. Below this, there are two sections: 'Final Rejection Actions' and 'Recall Actions'. The 'Final Rejection Actions' section has an 'Add Existing' button and an 'Add New' dropdown menu. The dropdown menu is open, showing four options: 'Task', 'Email Alert', 'Field Update', and 'Outbound Message'. The 'Field Update' option is highlighted. Below the dropdown menu, there is a table with columns 'Action Type' and 'Description'. The 'Recall Actions' section also has an 'Add Existing' button and an 'Add New' dropdown menu.

3. Enter the following values.

Parameter	Value
Name	Set Status to Rejected
Unique Name	Set_Status_to_Rejected (This automatically gets sent when you tab out of the Name field)
Field to Update	Status
Re-evaluate Workflow Rules after Field Change	Leave unchecked
Picklist Options	Select A specific value and select Rejected from the dropdown list.

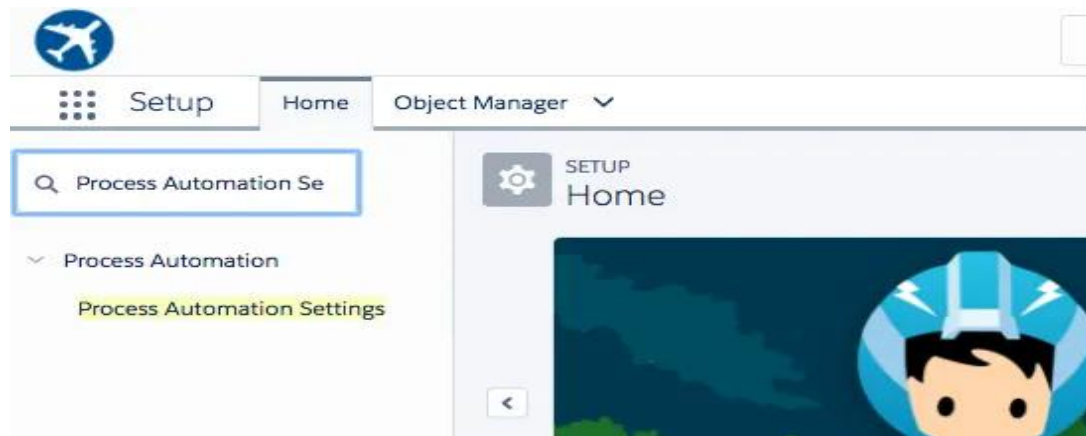
4. Click Save.
5. Click Activate.
6. Select OK in the popup window to confirm activation. Your approval process should now have the Active flag checked.



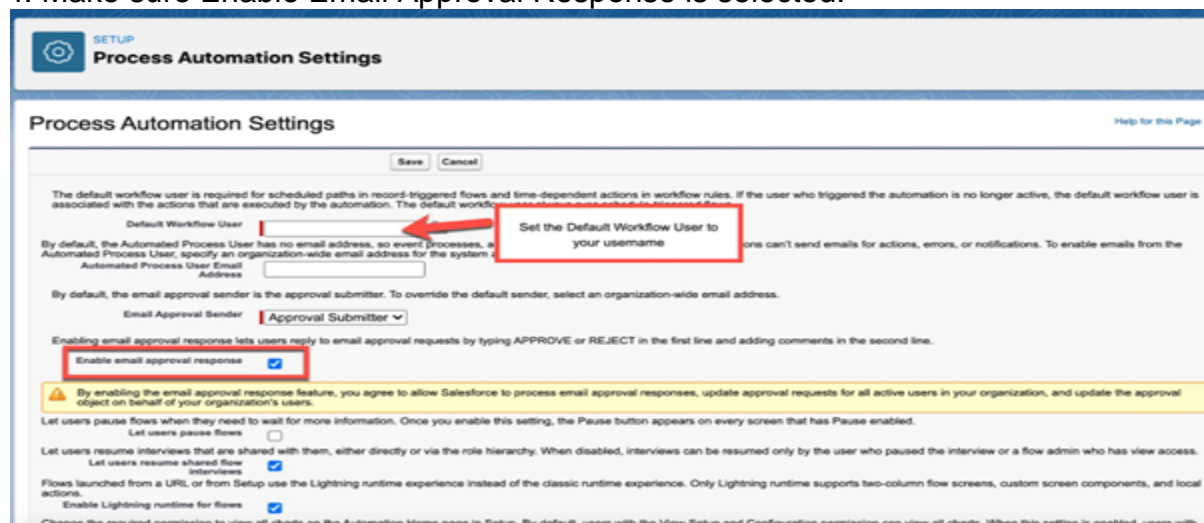
The screenshot shows the 'Travel Approval: Travel Approval Request' process definition detail page. At the top, there is a breadcrumb trail: 'Approval Processes > Travel Approval: Travel Approval Request'. Below this, there is a 'Process Definition Detail' section with buttons for 'Edit', 'Clone', 'Deactivate', and 'View Diagram'. The 'Active' checkbox is checked. Below this, there is a table with columns 'Process Name', 'Unique Name', 'Next Automated Approver Determined By', and 'Manager of Record Submitter'. The 'Process Name' is 'Travel Approval Request', the 'Unique Name' is 'Travel\_Approval\_Request', the 'Next Automated Approver Determined By' is 'Manager of Record Submitter', and the 'Manager of Record Submitter' is 'Manager of Record Submitter'. The 'Description' field is empty.

Next, you enable email approval responses.

1. Click and select Setup.
2. From setup, enter Process Automation Settings in the Quick Find box and select it.



3. Click the Process Automation Settings link.
4. Make sure Enable Email Approval Response is selected.



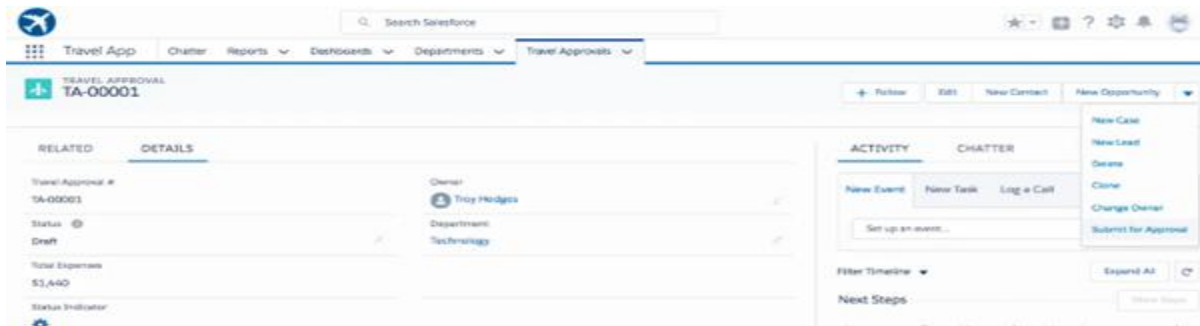
5. Set the Default Workflow User to your name.
6. Click Save.

## Test Your Approval Process

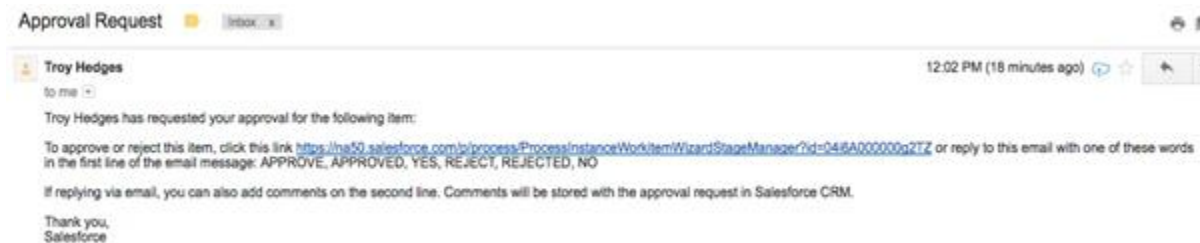
Time to Test

Now that you've created your approval process, let's test it out.

1. Using the App Launcher, navigate to the Travel App and click the Travel Approvals tab..
2. Select a record from the list. Make sure this is a travel approval record that has at least one expense item and a total expense amount greater than \$0.
3. Click the down arrow next to the New Opportunity button and select Submit for Approval..



4. Enter a comment and click Submit.
5. You should receive an email alert like the following that lets Eric Executive know that he has a travel approval to process. Notice that it provides a link to directly access the Travel Approval record so that Eric could review it. Also, the email includes the option to just respond to the email and reply with text like APPROVE, YES, REJECT, NO.



6. On your Travel Approval record, click the Related tab and you can see the new section titled Approval History that has details of your approval submission. Its status is Pending and it's assigned to Eric Executive.
7. At this point you could log out of Salesforce and log back in as Eric Executive. You can find this travel approval record (or click the link in the email) and see the same view as above. Since you are a System Administrator, you have the authority to approve any requests even if they are pending on other users.
8. Click Approve in the Approval History section.
9. In the popup window, enter a comment and click the Approve button once again.

Add Comments

Looks good. Have fun!

Cancel Approve

10. Since this was for out-of-town travel, the approval was sent to the Travel Coordinator (remember, this is the logic we defined for the Approval Process). The approval is actually pending on yourself since you are acting as the travel coordinator (obviously, this wouldn't be the case in a real-world implementation).

TRAVEL APPROVAL TA-00001

RELATED DETAILS

Expense Items (3)

EXPENSE ITEM NUMBER	EXPENSE TYPE	AMOUNT
E-00001	Airfare	\$450
E-00002	Hotel	\$870
E-00003	Rental car	\$520

View All

Approval History (3)

STEP NAME	DATE	STATUS	ASSIGNED TO
Travel Coordinator Approval	6/21/2017 11:25 AM	Pending	Troy Hedges
Step 1	6/21/2017 11:25 AM	Approved	Eric Executive
Approval Request Submitted	6/21/2017 11:22 AM	Submitted	Troy Hedges

View All

ACTIVITY CHATTER

New Event New Task Log a Call Email

Set up an event...

Add

Filter Timeline

Expand All

Next Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activity

No past activity. Past meetings and tasks marked as done show up here.

View Past Activity

11. Click Approve in the Approval History section to finish the approval.

12. Enter a comment in the popup window and click Approve.

13. The Approval History section should now look like the following:

Approval History (3)

STEP NAME	DATE	STATUS	ASSIGNED TO
Travel Coordinator Approval	6/21/2017 11:29 AM	Approved	Troy Hedges
Step 1	6/21/2017 11:25 AM	Approved	Eric Executive
Approval Request Submitted	6/21/2017 11:22 AM	Submitted	Troy Hedges

View All

14. Click the Details tab for your travel approval record. You should also notice the status value has been updated to Approved and the Status Indicator field now shows a green thumbs-up icon.

TRAVEL APPROVAL TA-00001

RELATED DETAILS

Travel Approval # TA-00001

Status Approved

Total Expenses \$1,440

Status Indicator

Owner Troy Hedges

Department Technology

15. Pick or create another travel request record and submit it for approval. Check your email and respond to the email with Reject. Navigate back to this travel approval record (or just click the link in the email). You should get the status value of Rejected and a red thumbs-down icon.

TRAVEL APPROVAL TA-00002

RELATED DETAILS

Travel Approval # TA-00002

Status Rejected

Total Expenses \$500

Status Indicator

Owner Troy Hedges

Department



Congratulations! You have added automation to your application using point and click tools such as:

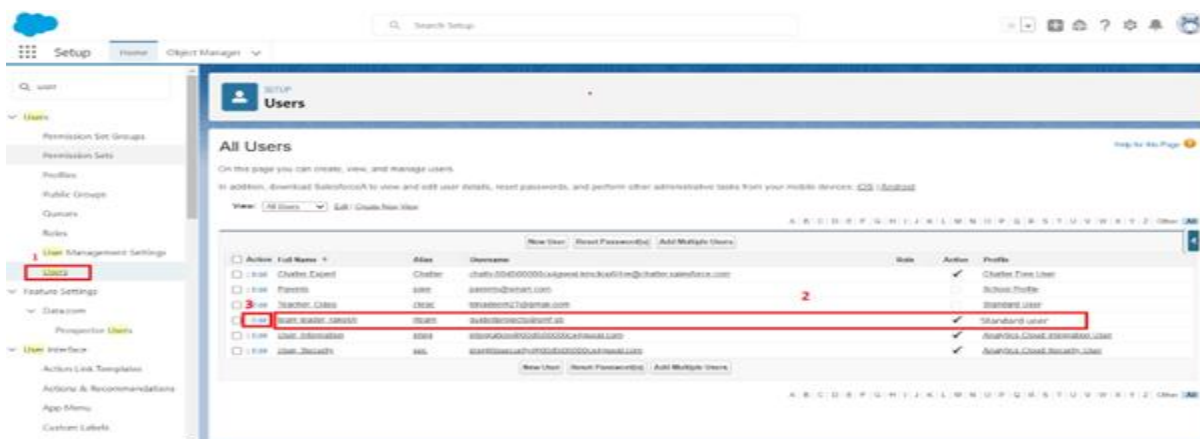
- Validations Rules
- Formula Fields
- Roll-Up Summary Fields
- Flow Builder
- Approval Processes

## Note

Step-1: Go to users

Step-2: click on Standard user profile as a user

Step-3: Click on edit



Step-4: Go to Approver setting

Step-5: In the manager option select the user in which you have sent the approval

Step-6: Select the User and click on save.

