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

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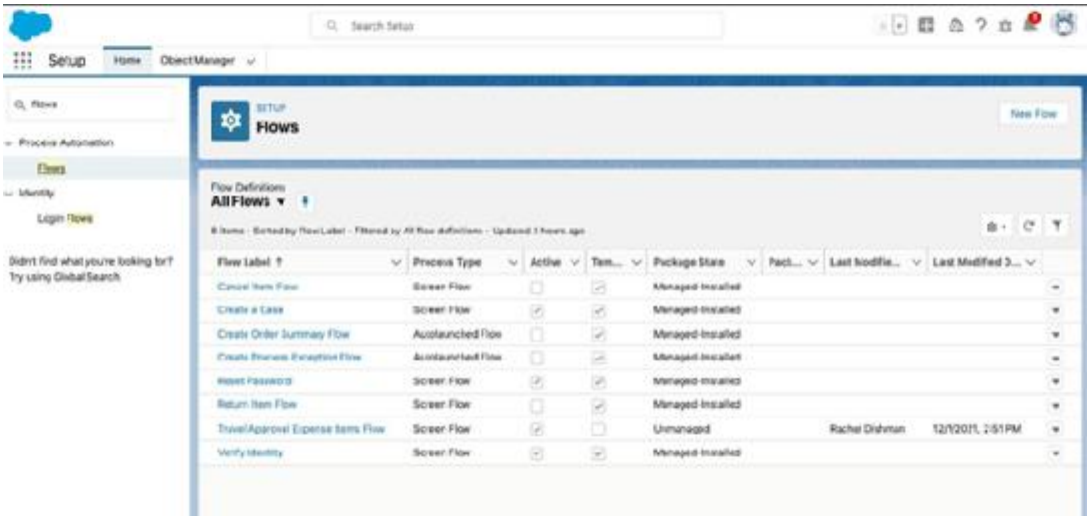
Flows

Create A Flow

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

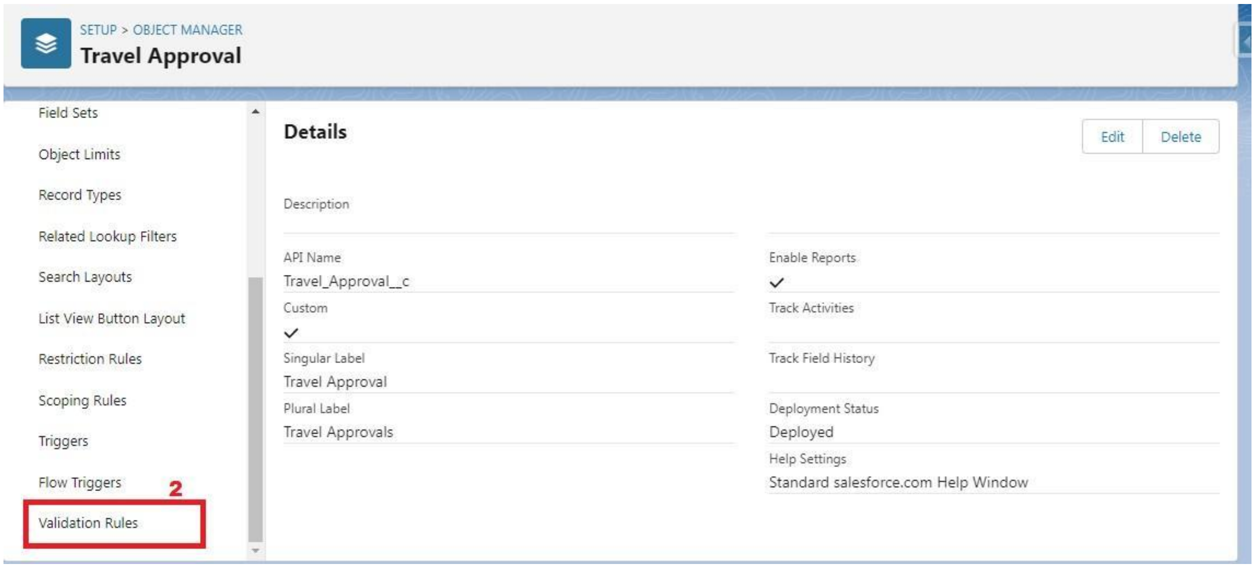
1. From Setup, click the Home tab.
2. Select Process Automation | Flows (or use the Quick Find and search for flows)

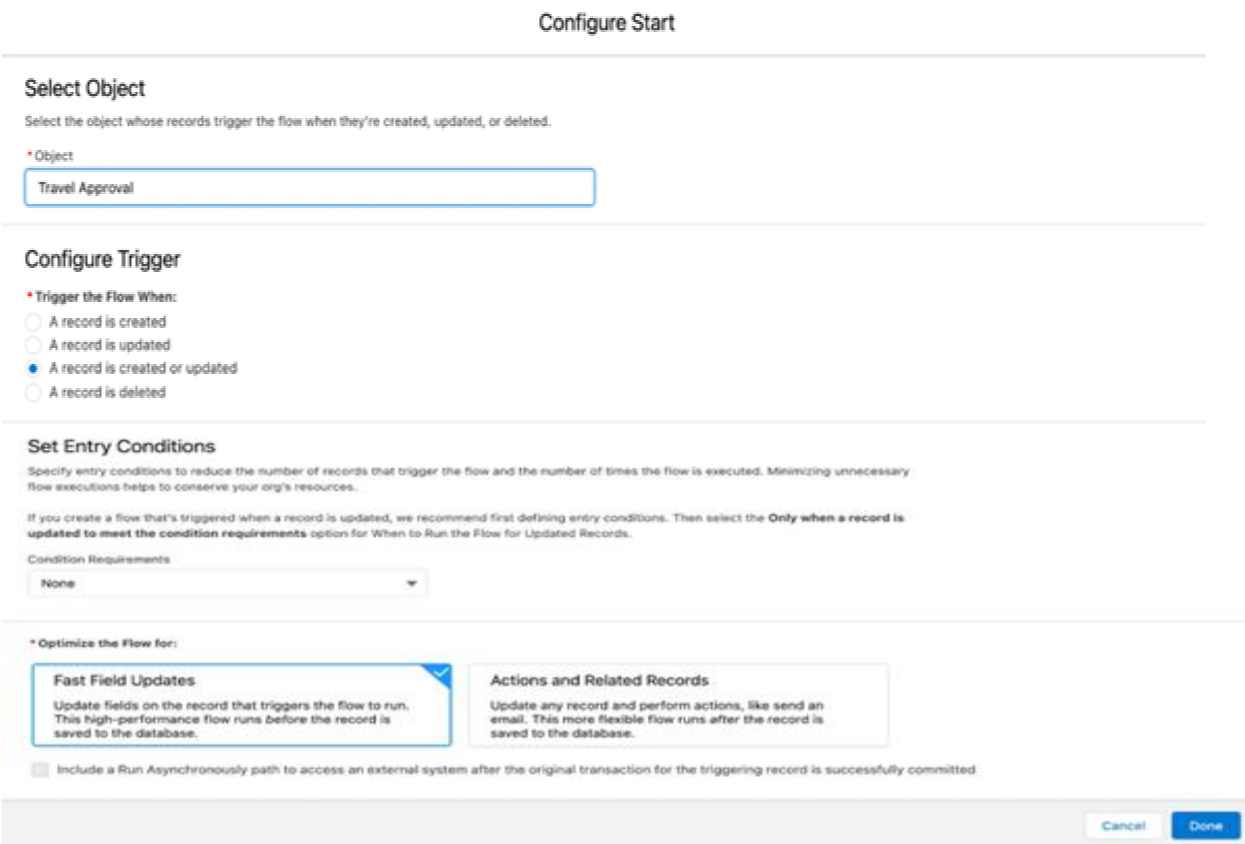


3. Click New Flow.
4. Select Record-Triggered Flow then click Create.
5. Enter these values:

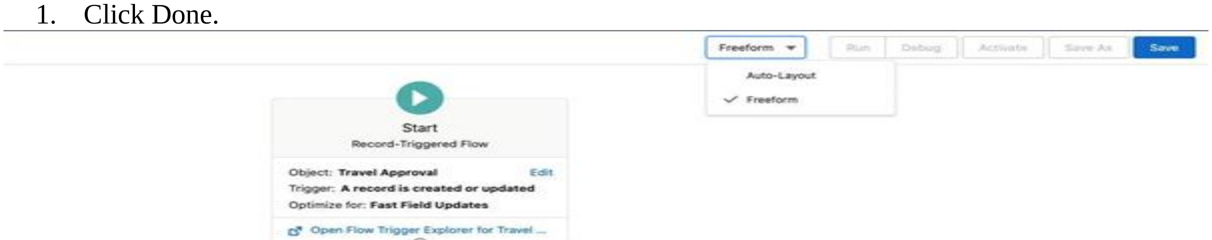
Parameter	Value
Object	Travel Approval
Configure Trigger	Trigger the flow when: **A record is created or updated**
Condition Requirements	None
Optimize the Flow For:	Fast Field Updates

The Configure Start screen should look like this:





1. Click Done.



7. In the Layout dropdown, select Freeform.

Add a Decision Element

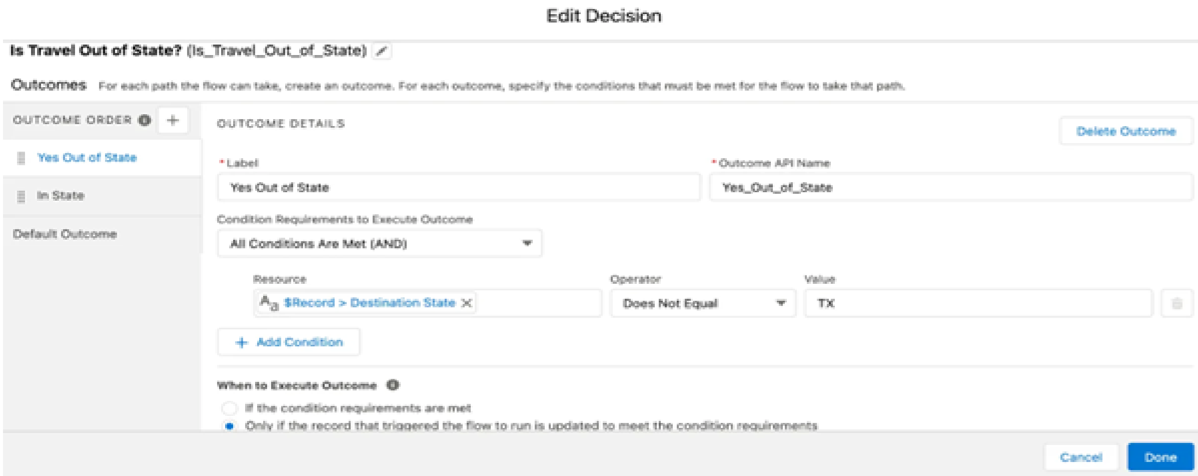
1. From the left-hand toolbox column, drag a Decision element onto the flow builder screen.
2. Set the following parameters:

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	**$Record > 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**

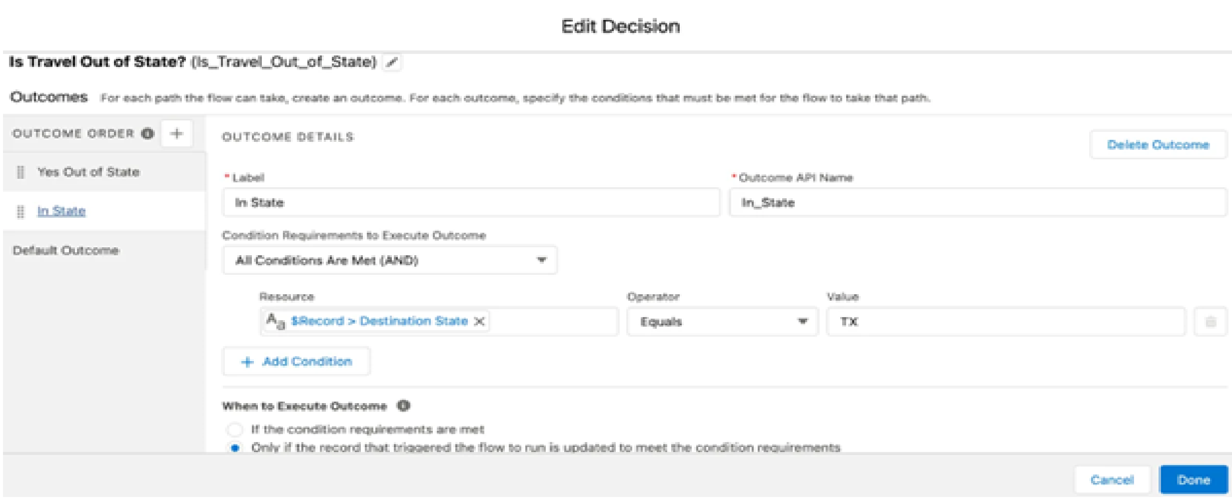
Your Edit Decision Screen should look like this:



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.



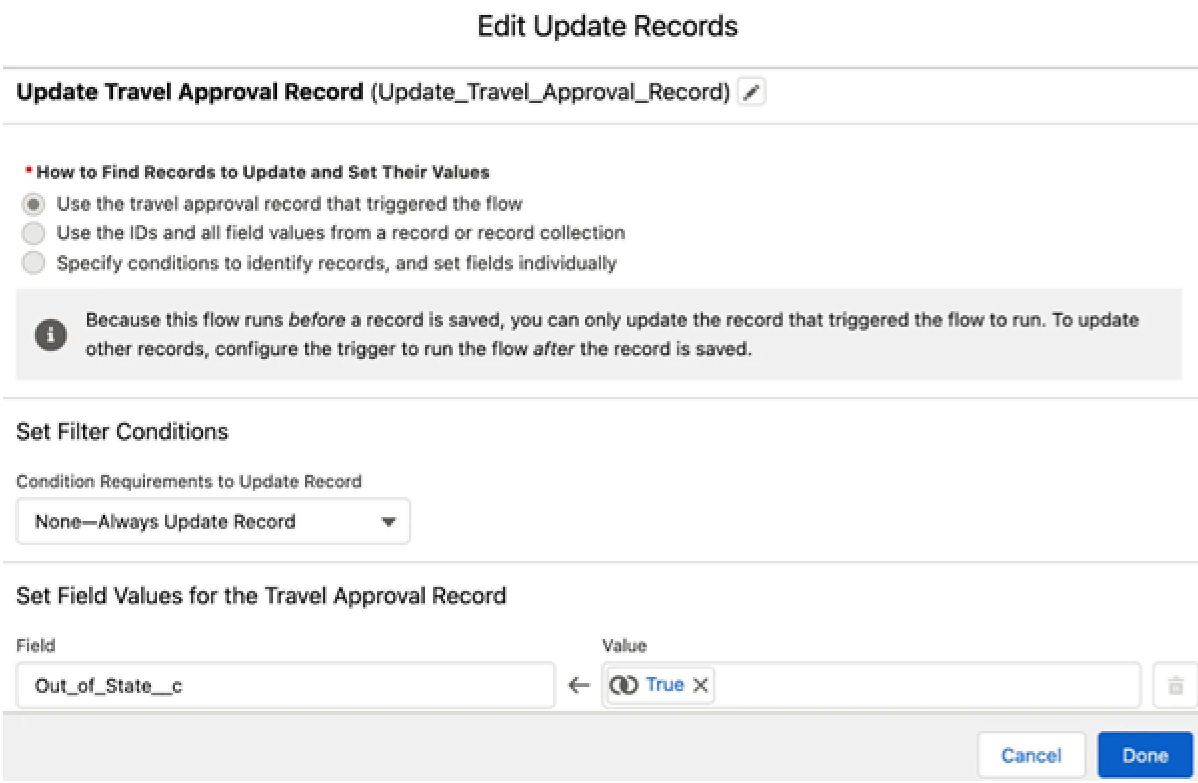
8. Drag the white circle from the Start Flow element to the Decision element you just created to link the direction of the arrow.

Create an Action for the Flow Using Update Records Elements

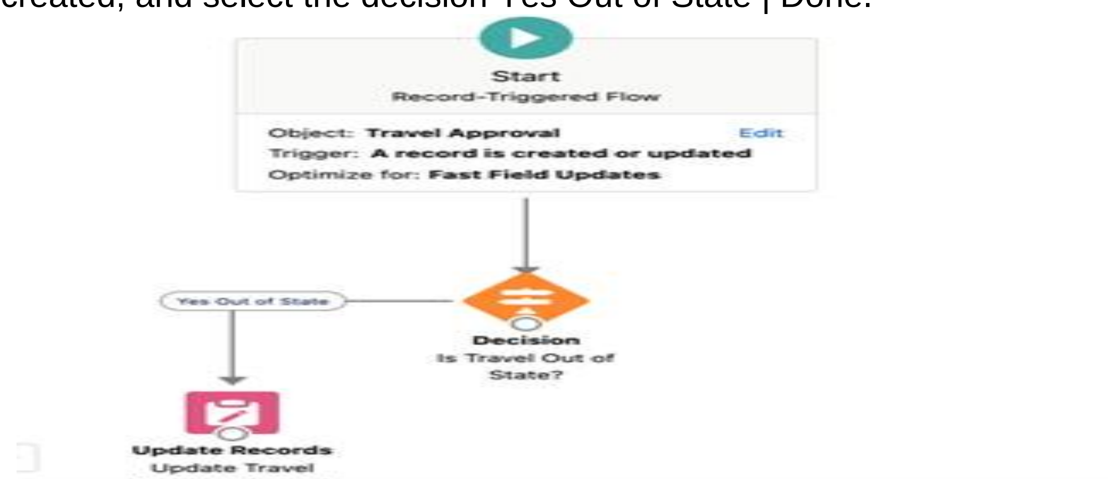
1. From the left-hand column, the flow toolbox, drag an Update Records element onto the flow screen.
2. Set the parameters for the element:

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)

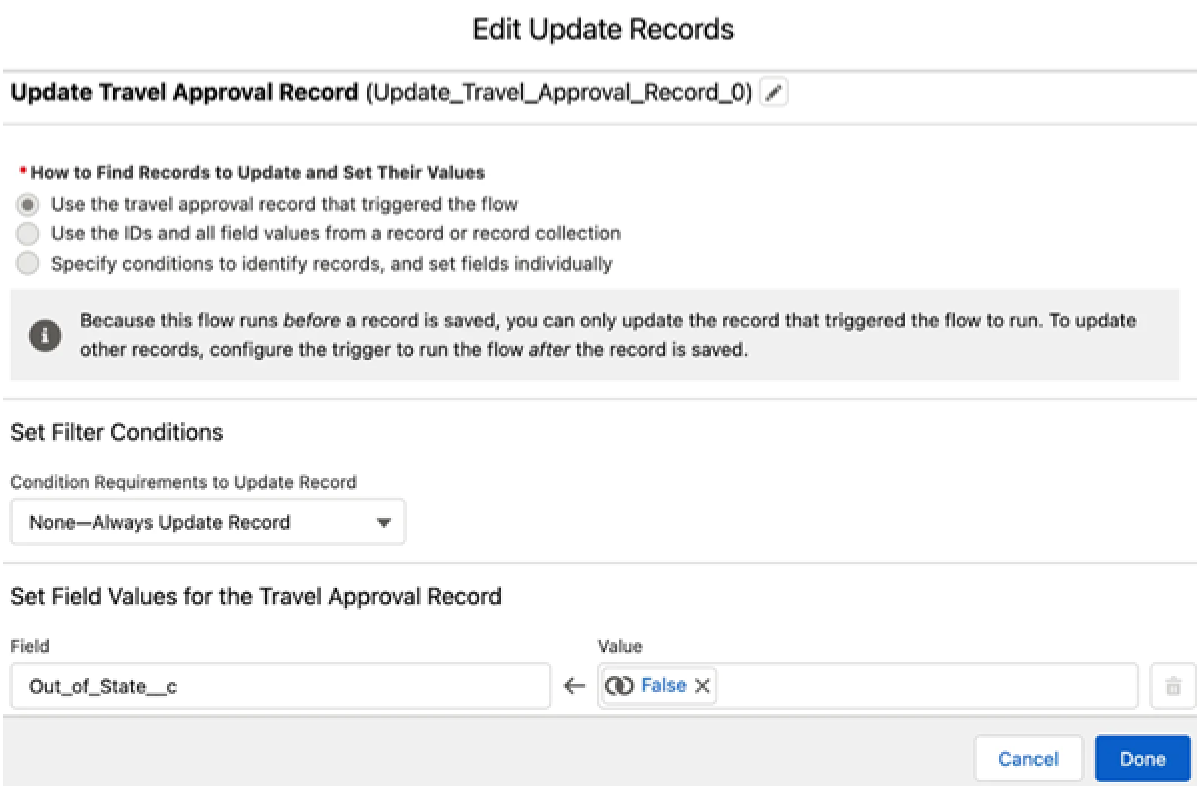
Your Update Record Screen should look like this:



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.

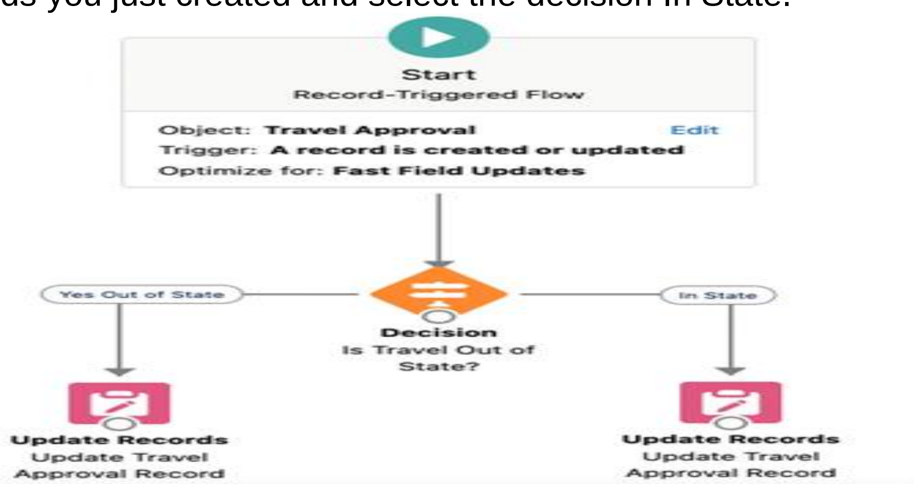


To save time, you can simply duplicate the Update Records element you just created and update the criteria.
5. Click the Update Records node and make sure it is highlighted in blue. In the top-left corner of the Flow Builder screen, find the and click the duplicate button Duplicate button. Double-click 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.



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.



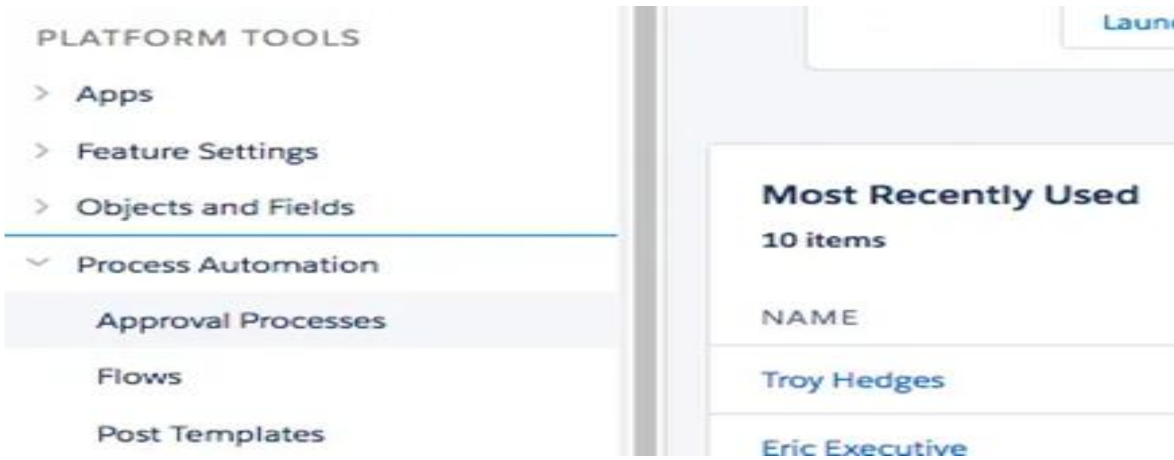
1. Click Save.
2. Flow Label: Out of State Travel Flag. Flow API Name will auto populate to Out_of_State_Travel_Flag. Leave Description blank and advanced settings as is.
3. Click Save.
4. Click Activate.

Approval Process

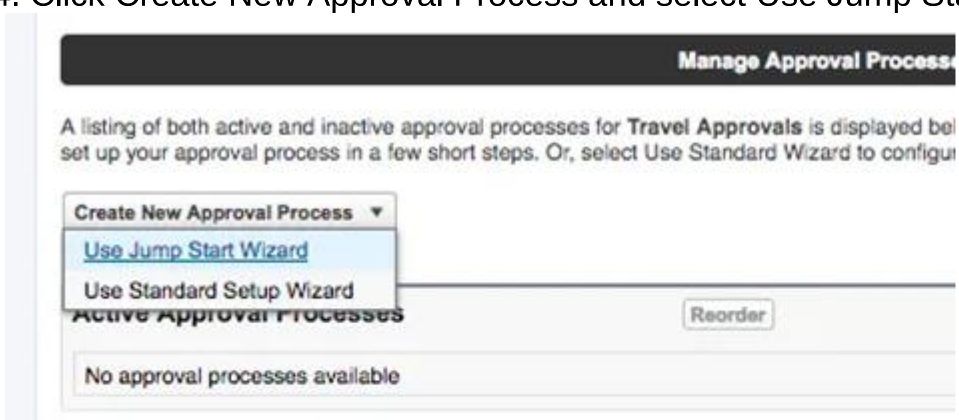
Create A Approval Process

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: **criteria are met**
Field	**Travel Approval: Total Expenses**
Operator	**greater than**
Value	`0`
Select Approver	• **Automatically assign an approver using a standard or custom hierarchy field** • Select **Manager** from the option list

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**

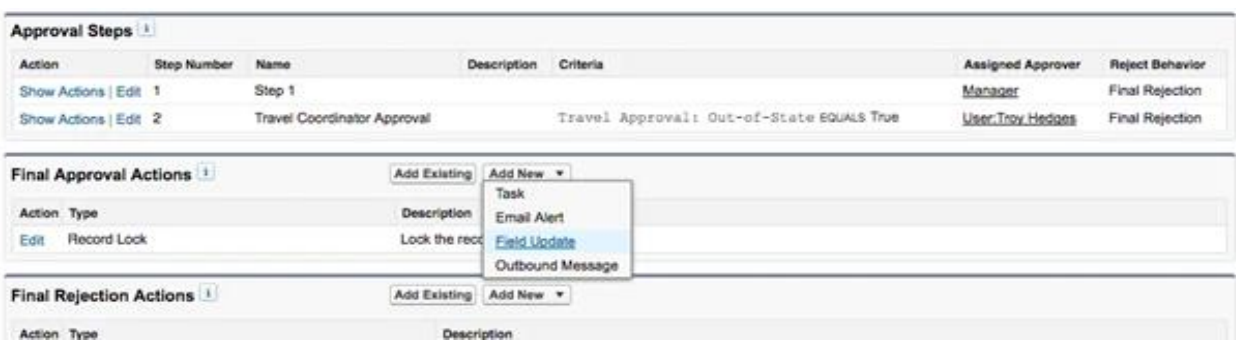
3. Click Next.
4. Ensure Enter this step if the following is selected and the criteria are met option is selected.
5. Enter the following formula criteria
Field: Travel Approval: Out-of-State
Operator: equals
Value: True
6. Click Next.
7. Select the Automatically assign to the approver(s) option.

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.



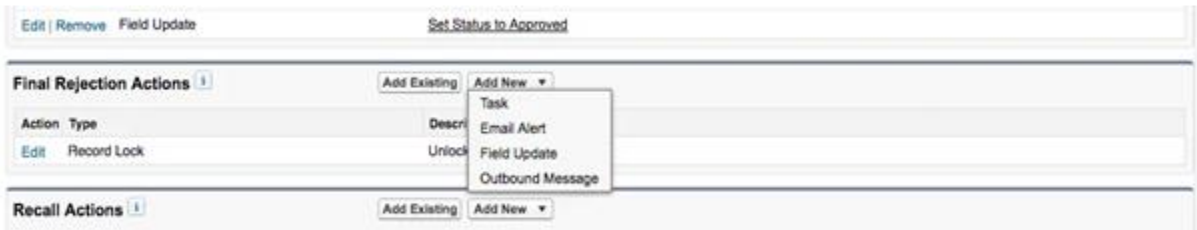
3. Enter the following values.

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.



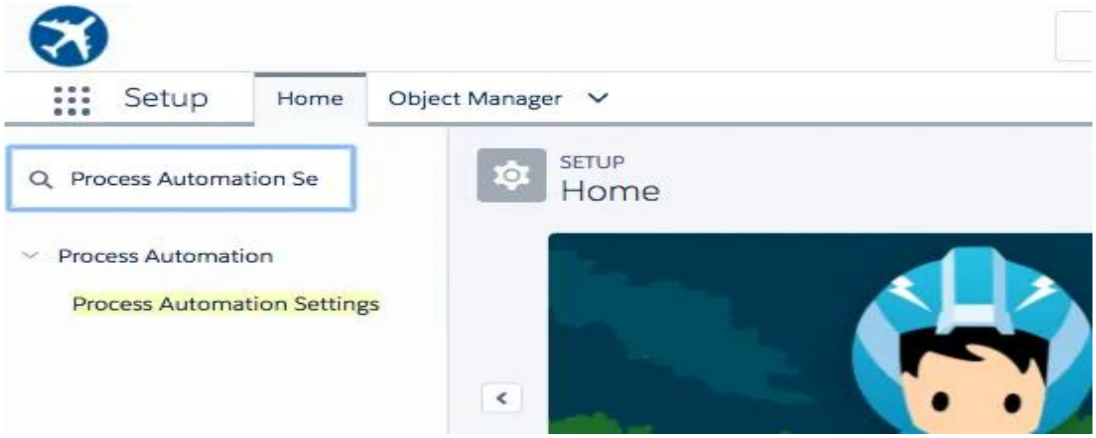
3. Enter the following values.

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.

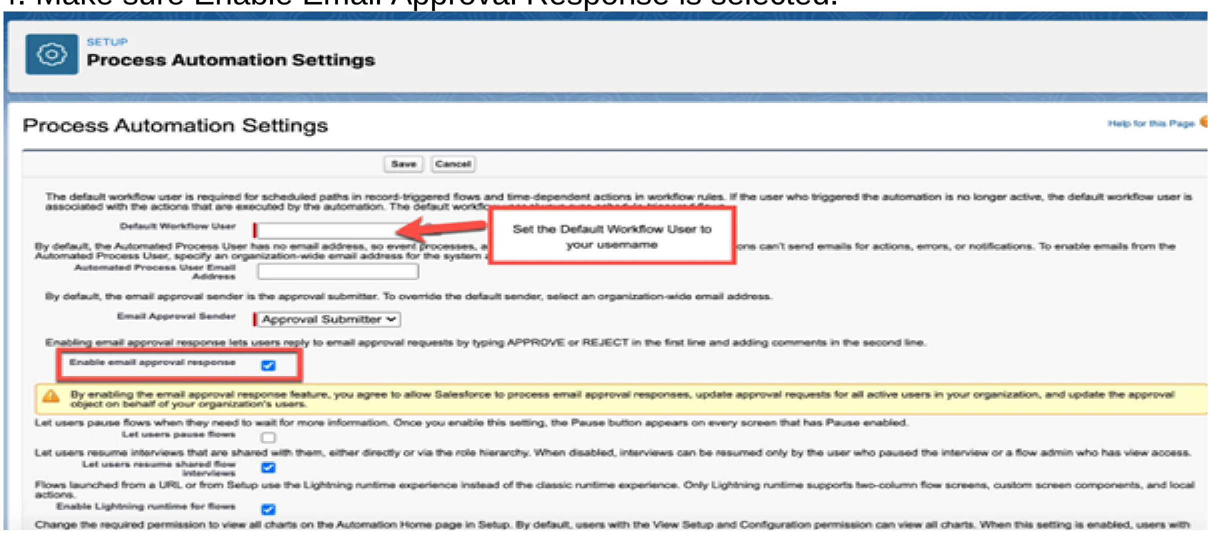
4. Click Save.
5. Click Activate.
6. Select OK in the popup window to confirm activation. Your approval process should now have the Active flag checked.

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.

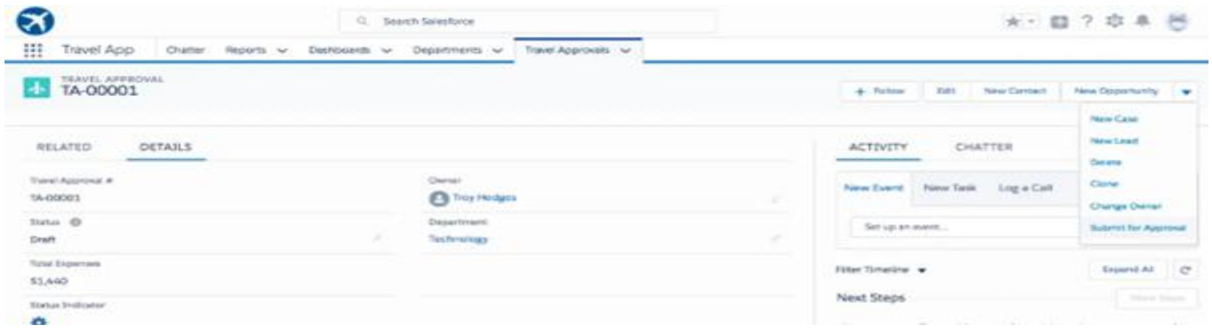


5. Set the Default Workflow User to your name.
6. Click Save.

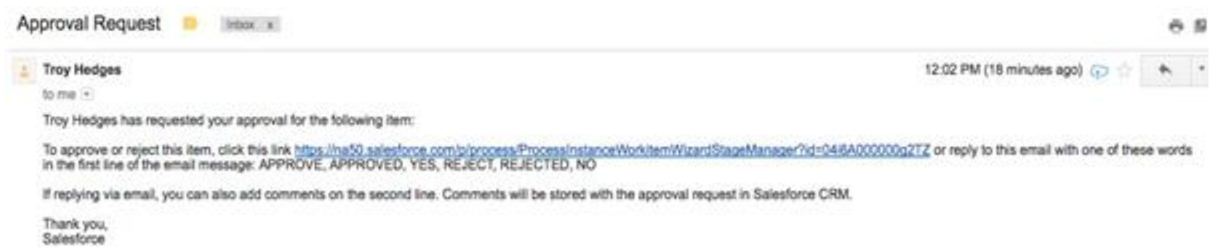
Test Your Approval Process

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

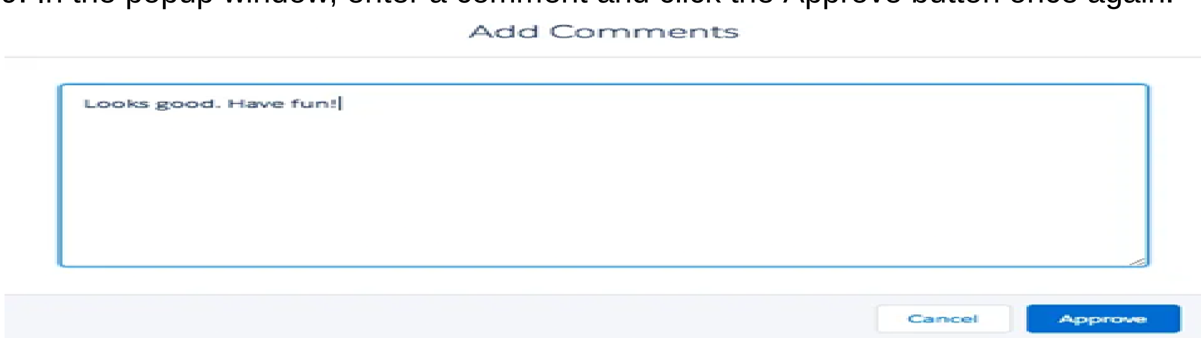
1. Using the App Launcher, navigate to the Travel App and click the Travel Approvals tab..
2. Select a record from the list. Make sure this is a travel approval record that has at least one expense item and a total expense amount greater than $0.
3. Click the down arrow next to the New Opportunity button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



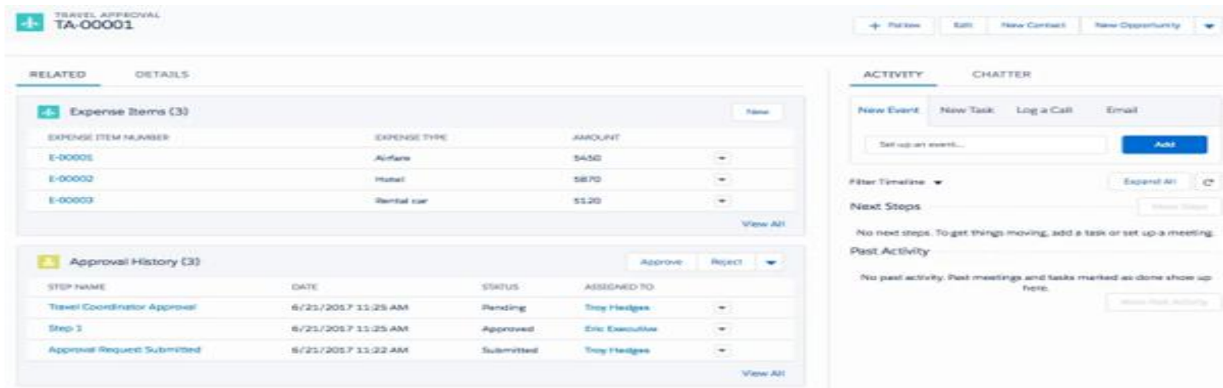
4. Enter a comment and click Submit.
5. You should receive an email alert like the following that lets Eric Executive know that he has a travel approval to process. Notice that it provides a link to directly access the Travel Approval record so that Eric could review it. Also, the email includes the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



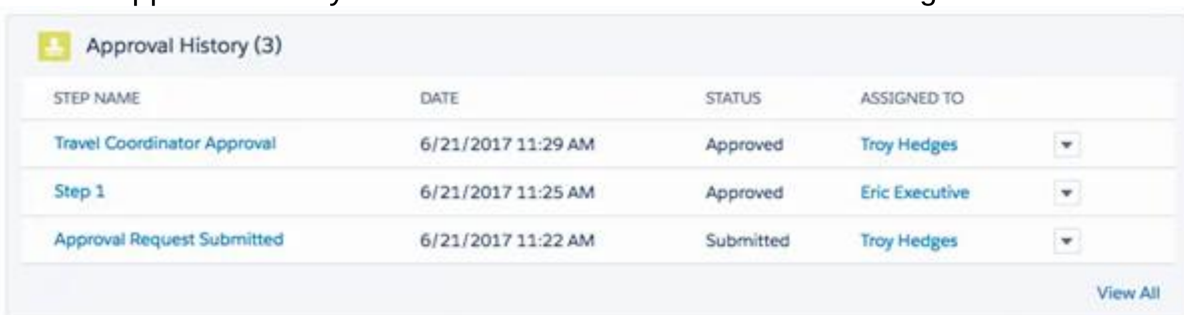
6. On your Travel Approval record, click the Related tab and you can see the new section titled Approval History that has details of your approval submission. Its status is Pending and it's assigned to Eric Executive.
7. At this point you could log out of Salesforce and log back in as Eric Executive. 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.



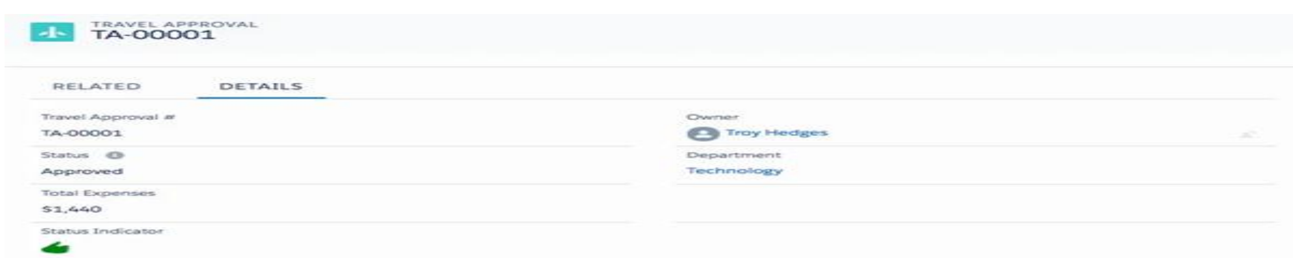
10. Since this was for out-of-town travel, the approval was sent to the Travel Coordinator (remember, this is the logic we defined for the Approval Process). The approval is actually pending on yourself since you are acting as the travel coordinator (obviously, this wouldn't be the case in a real-world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



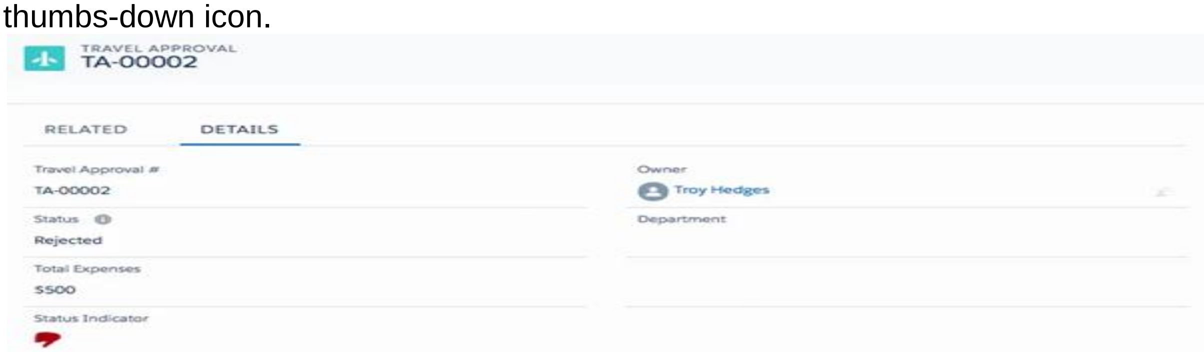
11. Click Approve in the Approval History section to finish the approval.
12. Enter a comment in the popup window and click Approve.
13. The Approval History section should now look like the following:



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.



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.

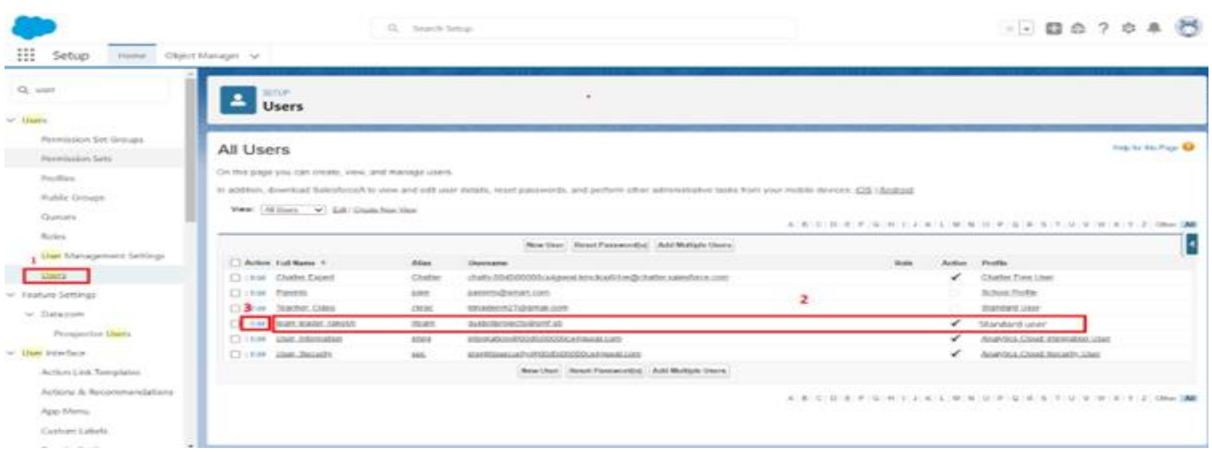


Congratulations! You have added automation to your application using point and click tools such as:

- 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.