<u>Project Name</u>:- Build An Employee Travel Approval Application For Corporates - (Developer)

Team ID : LTVIP2024TMID12769

Team Size : 5

Team Leader : H E HEMANTH

Team Member : S VIGNESH

Team Member : THUPAKULA SOMESWARA

Team Member : RANGASAMUDRAM RAMANJINEYULU

Team Member : R PALGUNA

Milestone 1- Create Salesforce Org

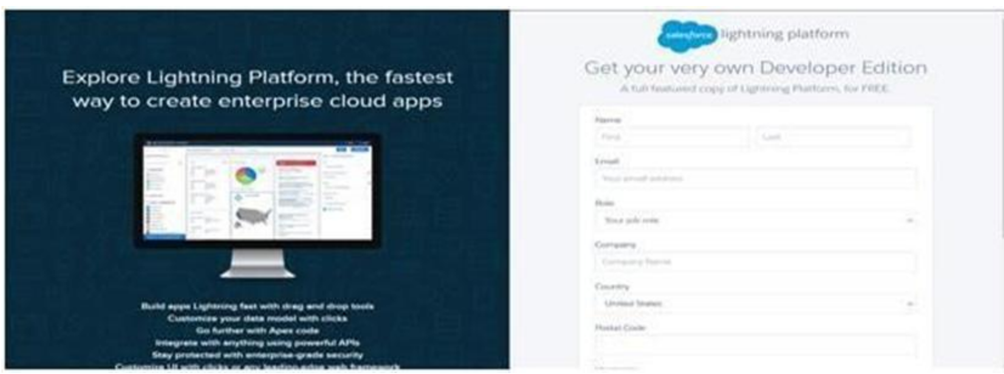
Creating Developer Org

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign-up form, enter the following details:
1. First name & Last name
2. Email
3. Role: Developer
4. Company: College Name
5. County: India
6. Postal Code: pin code
7. Username: should be a combination of your name and company

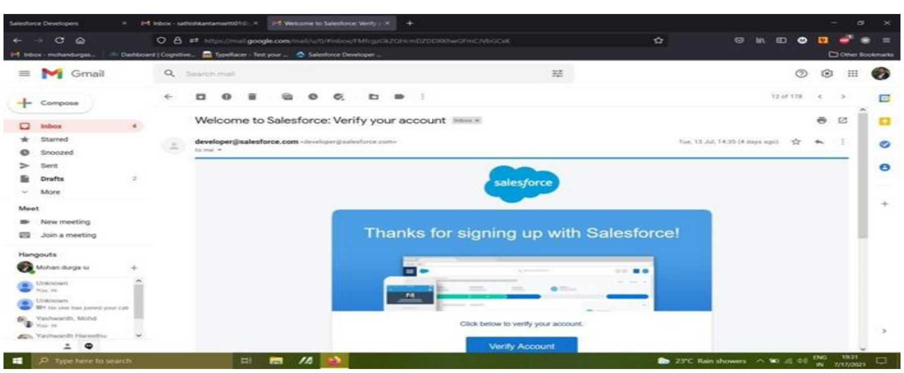
   This need not be an actual email id, you can give anything in the format: username@organization.com

Click on sign up after filling these.



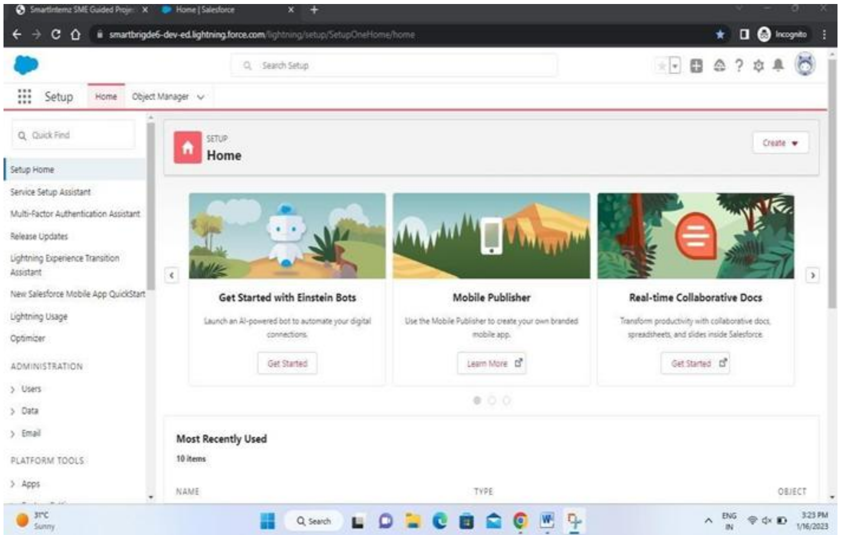
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as

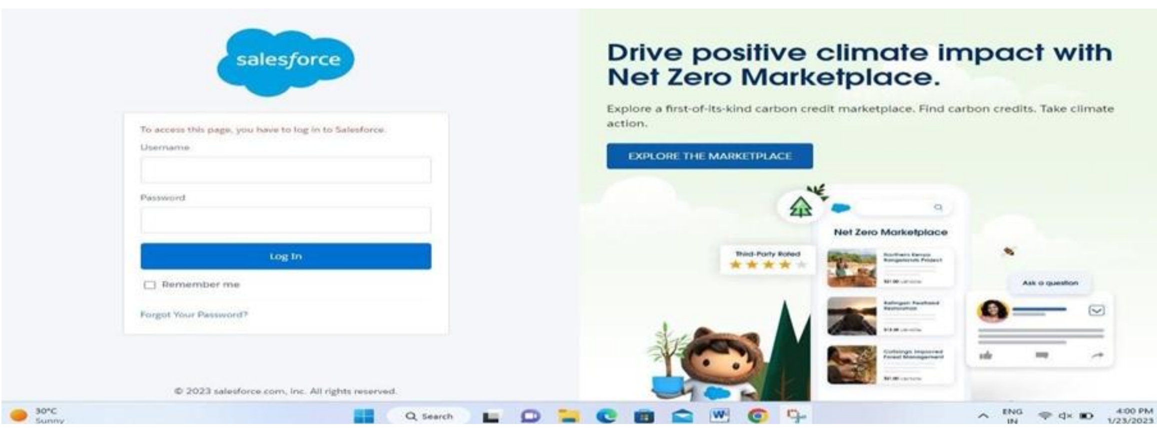


Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Salesforce Login
httpts://login.salesforce.com



Object In Salesforce

Creation Of Department Object For Travel Approval App

For this Travel Approval we need to create 5 objects **Department, Employee Detail, Expense, Expense Items,** and **Travel Approval**. The below steps will assist you in creating those objects.

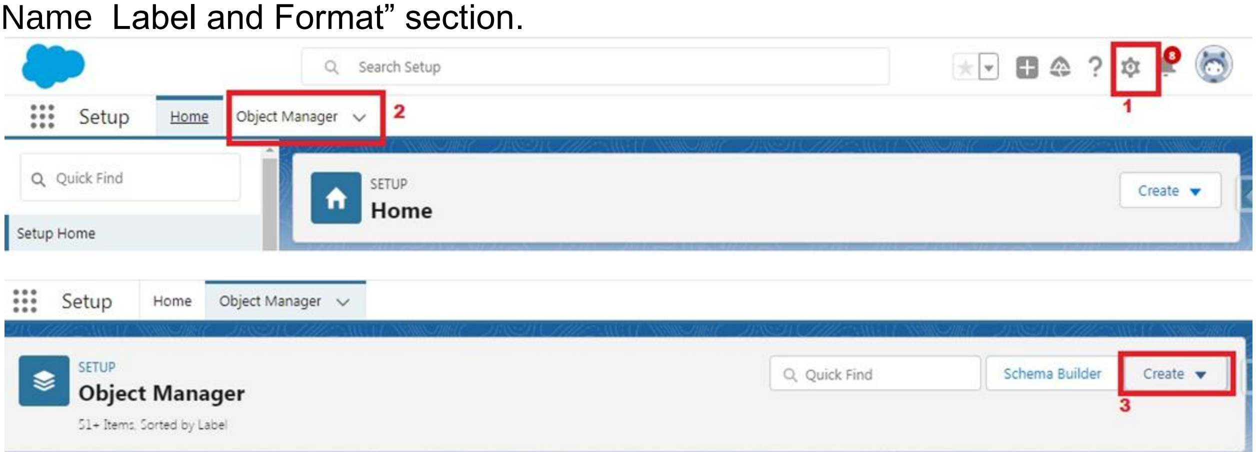
Create Department Object:

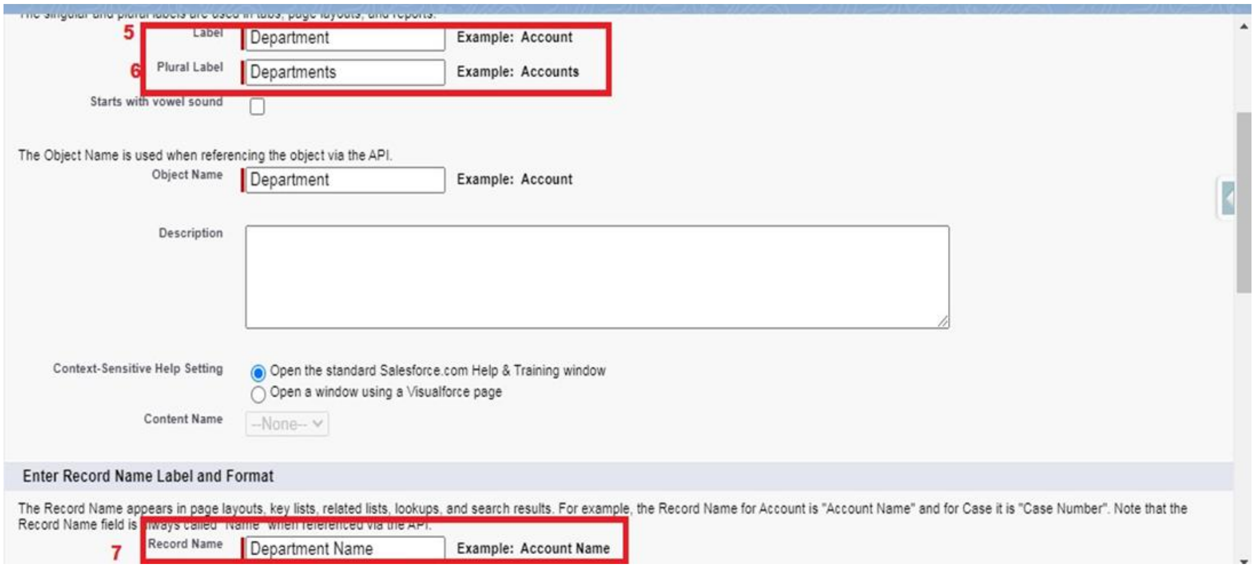
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Department
6. Plural Label: *Departments*
7. Record Name: *Department Name*
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

In the same way create 4 more objects **Employee Detail, Expense, Expense Items**, and **Travel Approval**

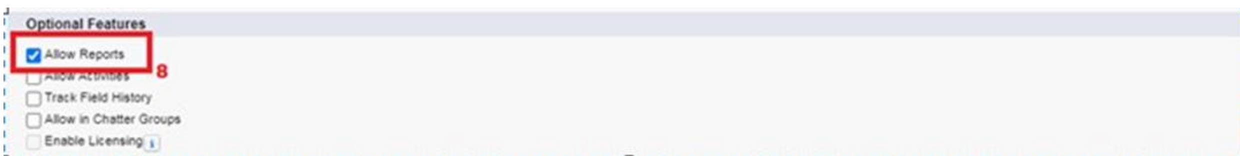
Note –

1. While making Expense Object select data type “Auto Number” in “Enter Record Name Label and Format” section.
2. While making Employee Detail Object put “Employee Name” in “Enter Record Name Label and Format” section.

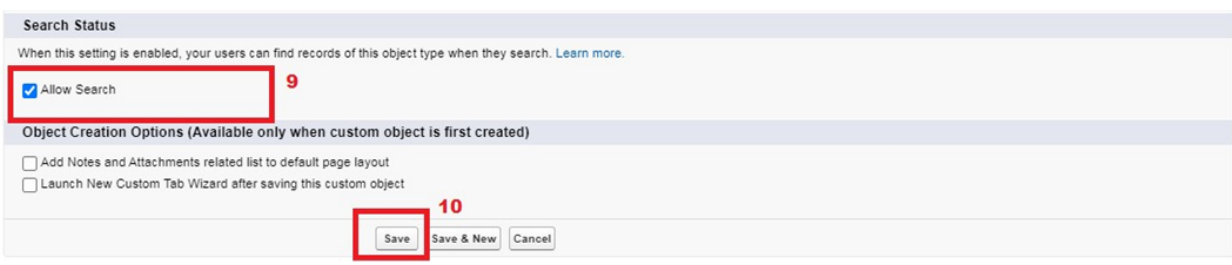




5 Label Department Example: Account
6 Plural Label Departments Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name Department Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name --None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
7 Record Name Department Name Example: Account Name



Optional Features
Allow Reports 8
Track Field History
Allow in Chatter Groups
Enable Licensing



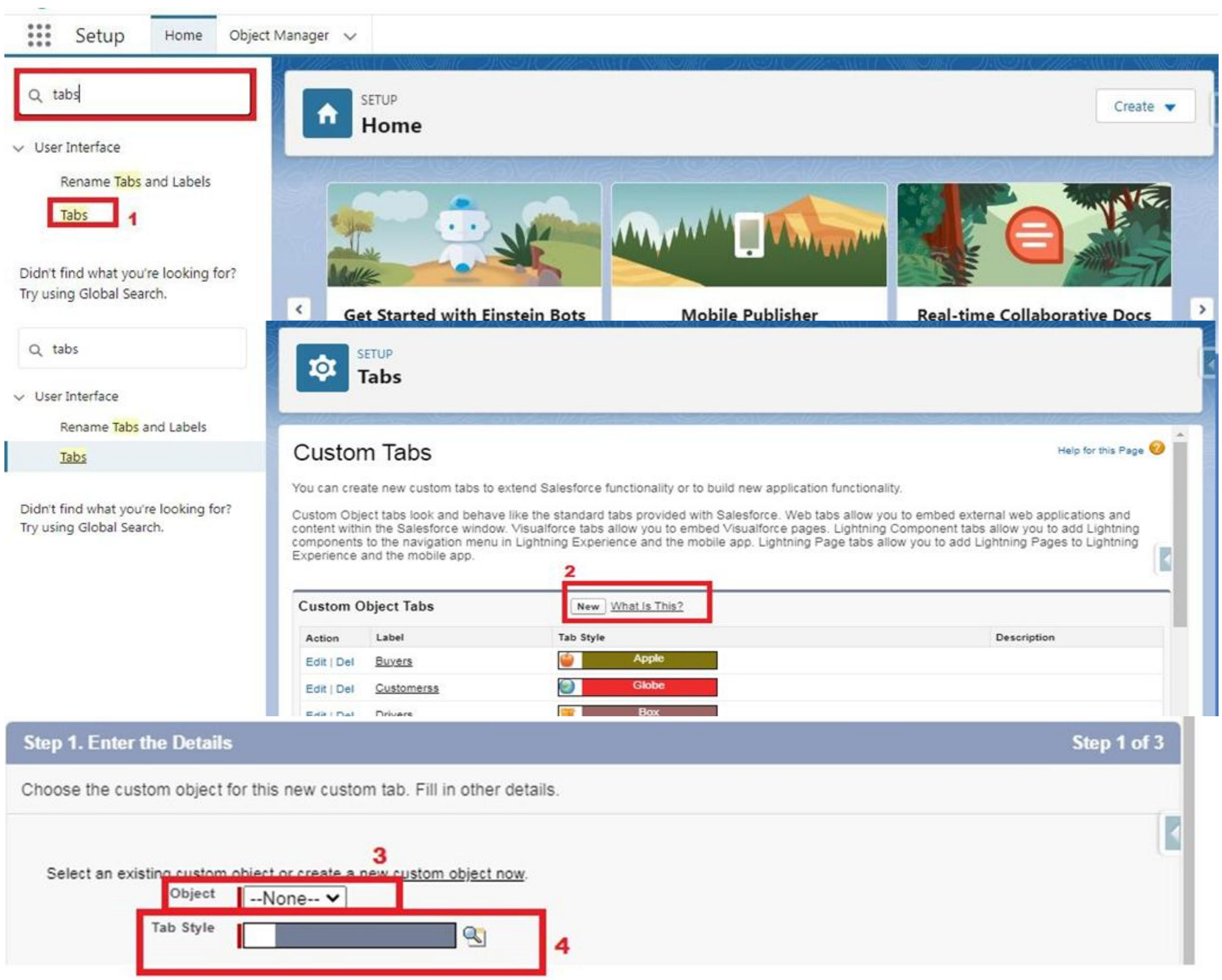
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search 9
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object
10
Save
Save & New
Cancel

What Is A Tab?

Custom Tab Creation

Now create a custom tab. Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Department.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects - Employee Detail, Expense, Expense Items, Travel Approval.

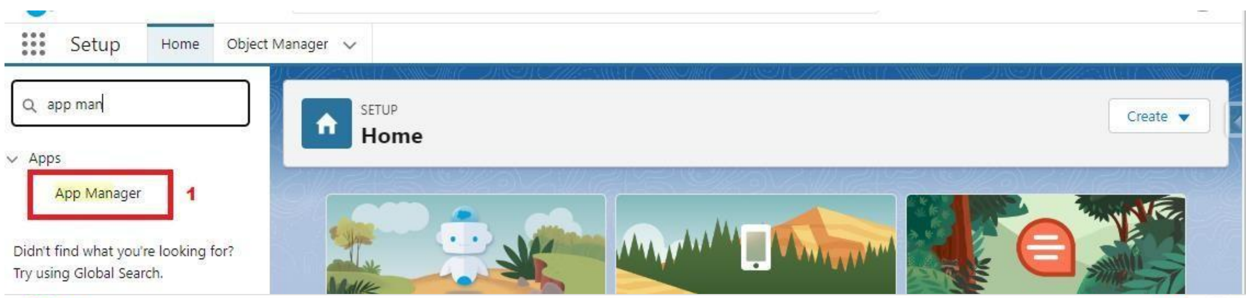


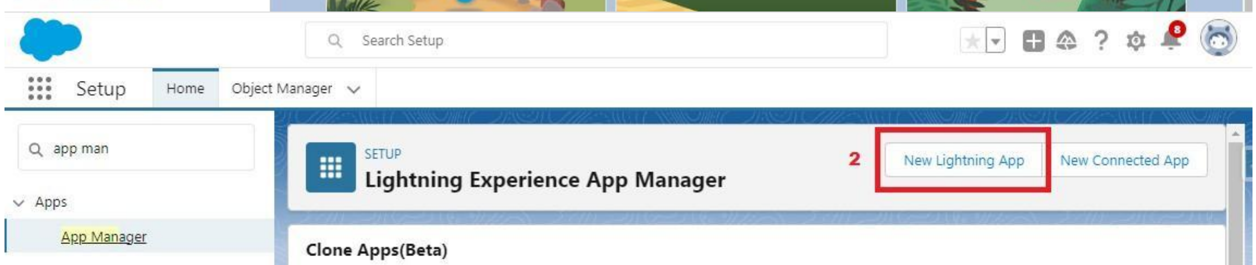
Lightning App

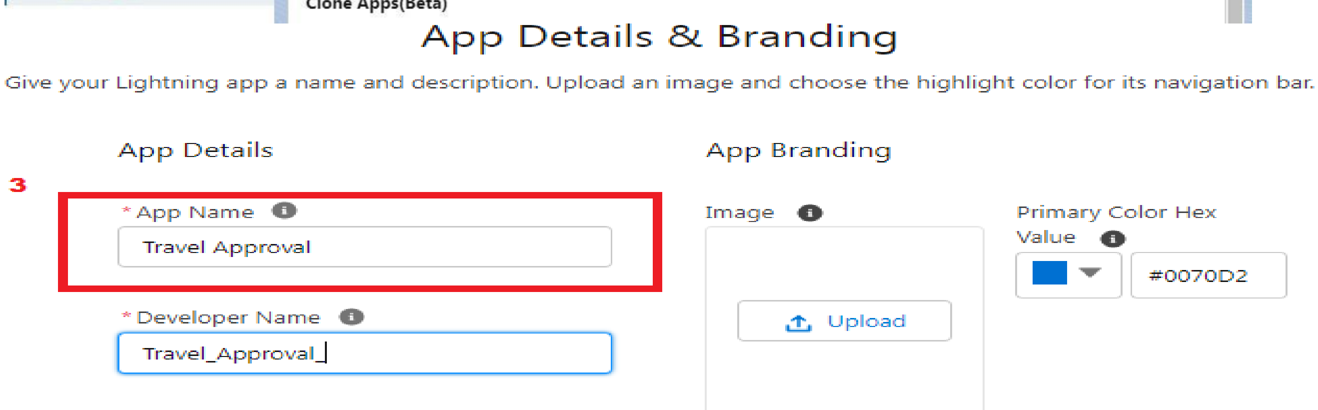
Create Travel Approval App

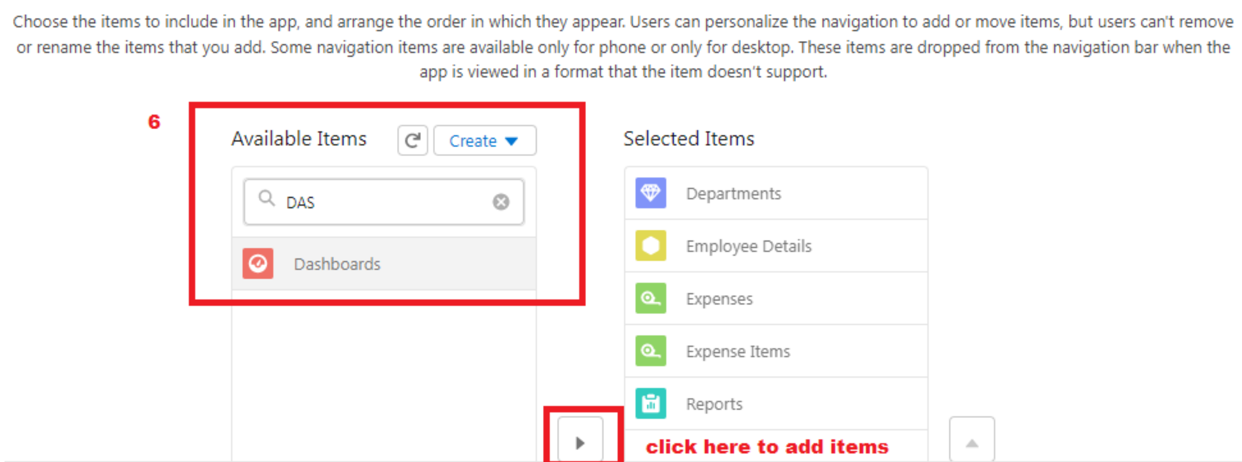
Create the Travel Approval app

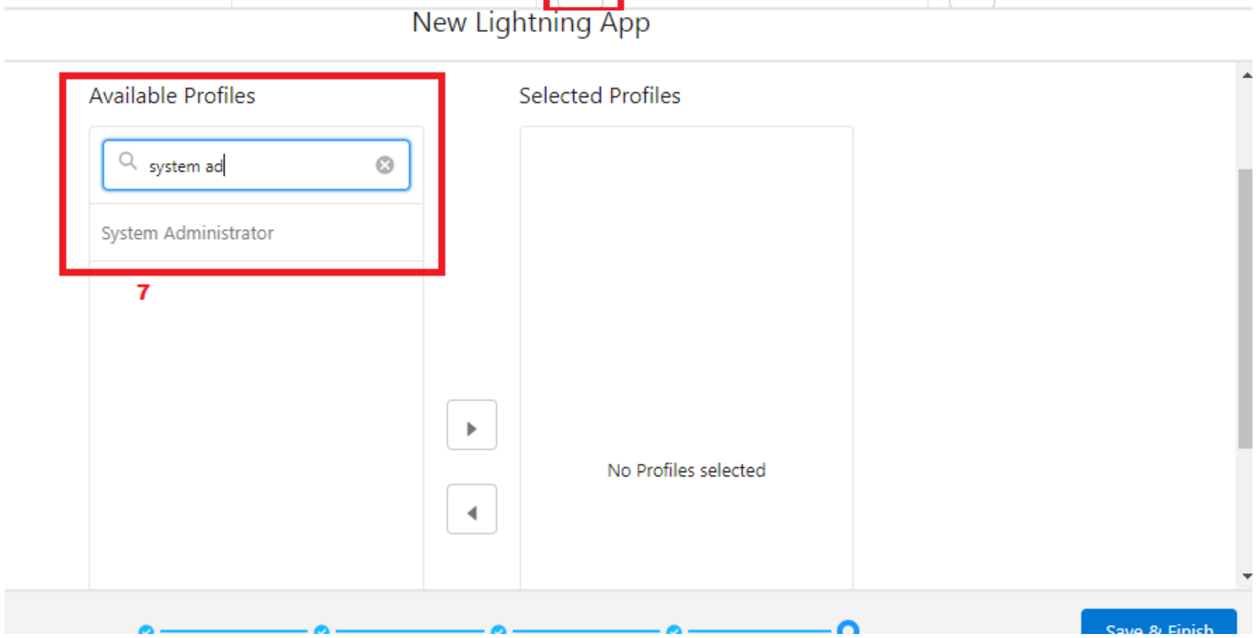
1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter **Travel Approval** as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select **Department, Employee Detail, Expense, Expense Items, Travel Approval, Reports, and Dashboards** and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles.Click Save & Finish.





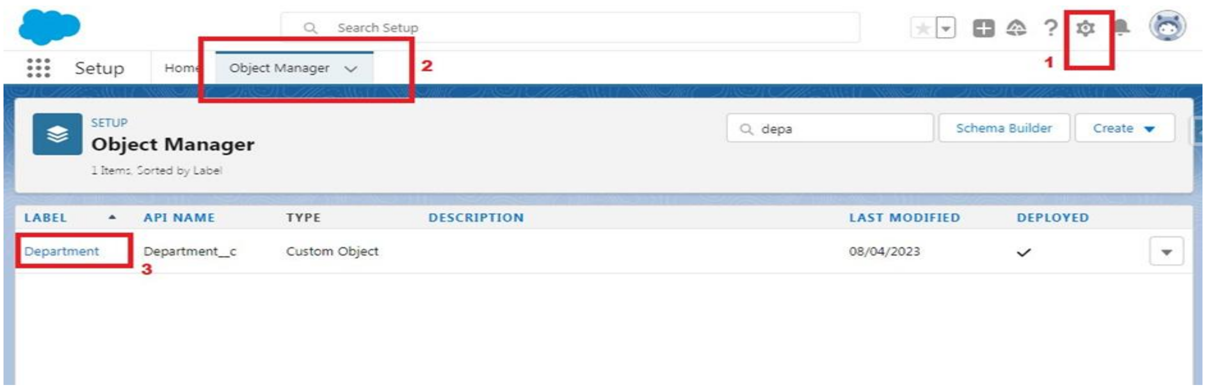


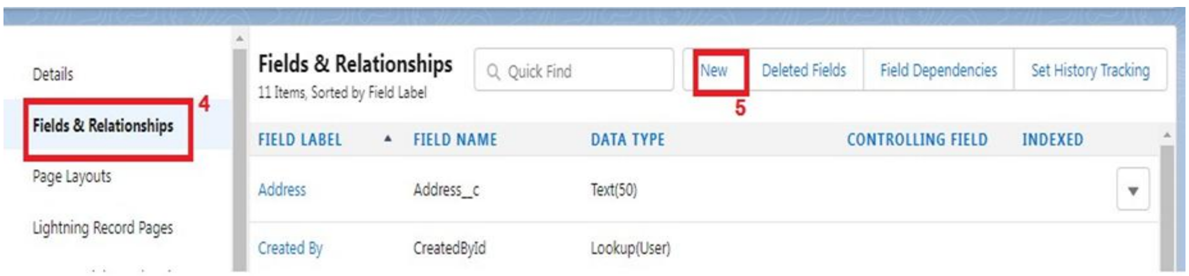


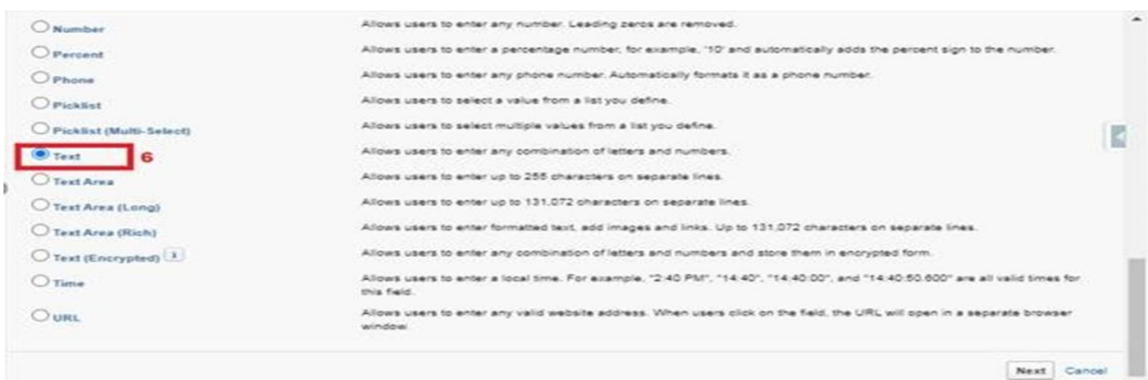


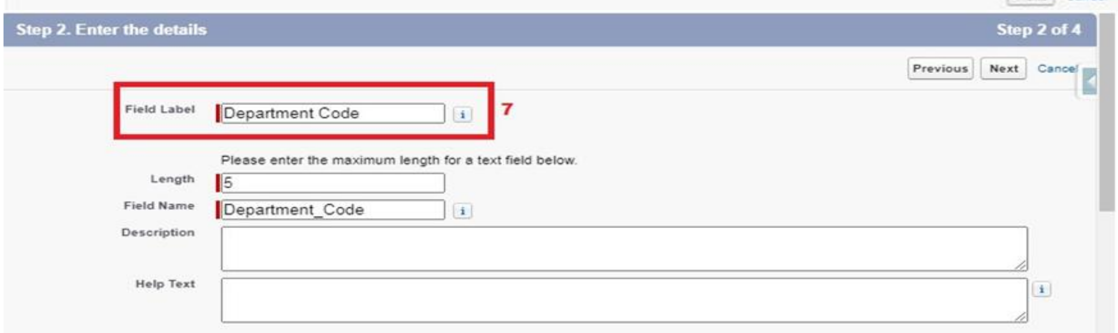
Creation Of Fields For The Department Object:

1.Click the gear icon and select Setup. This launches Setup in a new tab.
2.Click the Object Manager tab next to Home.
3.Select Department
4.Select Fields & Relationships from the left navigation
5.Click New
6.Select the Text as the Data Type, click Next.
7.For Field Label, enter Department Code and enter 5 in Length.
8.Click Next, Next, then Save & New.
9.Follow above steps and create two more Text type field - District & State.
10.Also, Provide Length 40 for both District and State field.
11.Create URL type field & give “School website” as the field label.







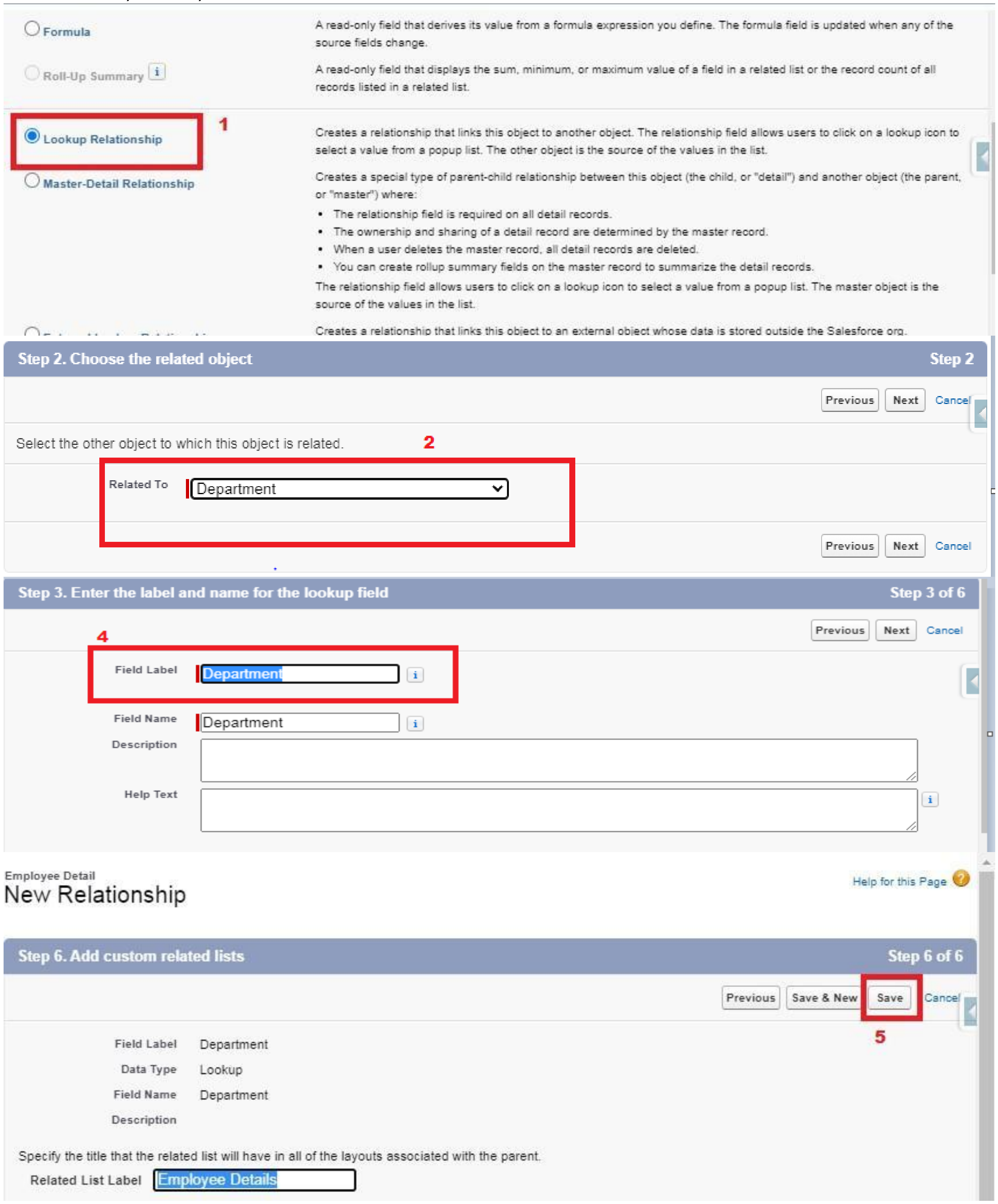


Lookup Relationship With Department

Let's create a Lookup relationship with Department object on Employee Detail object Follow steps 1 to 5 of field creation then follow below steps. Select look up Relationship as the Data Type and click Next.

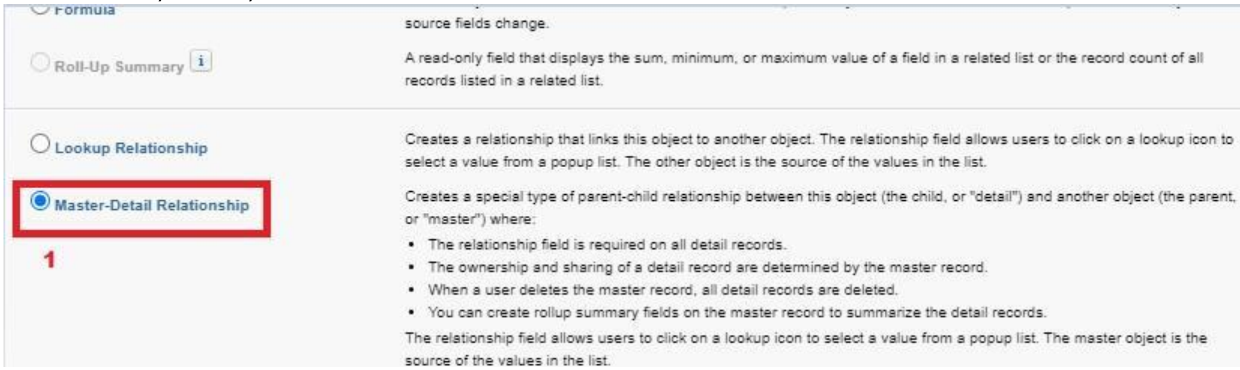
For Related to, enter Department.
Click Next.

For Field Label, enter Department.
Click Next, Next, Next and Save.



Let's create a master-detail relationship on Expense Item object Follow steps 1 to 5 of field creation then follow below steps.
Select Master-Detail Relationship as the Data Type and click Next.
For Related to, enter Expense.
Click Next.

For Field Label, enter Expense.
Click Next, Next, Next and Save



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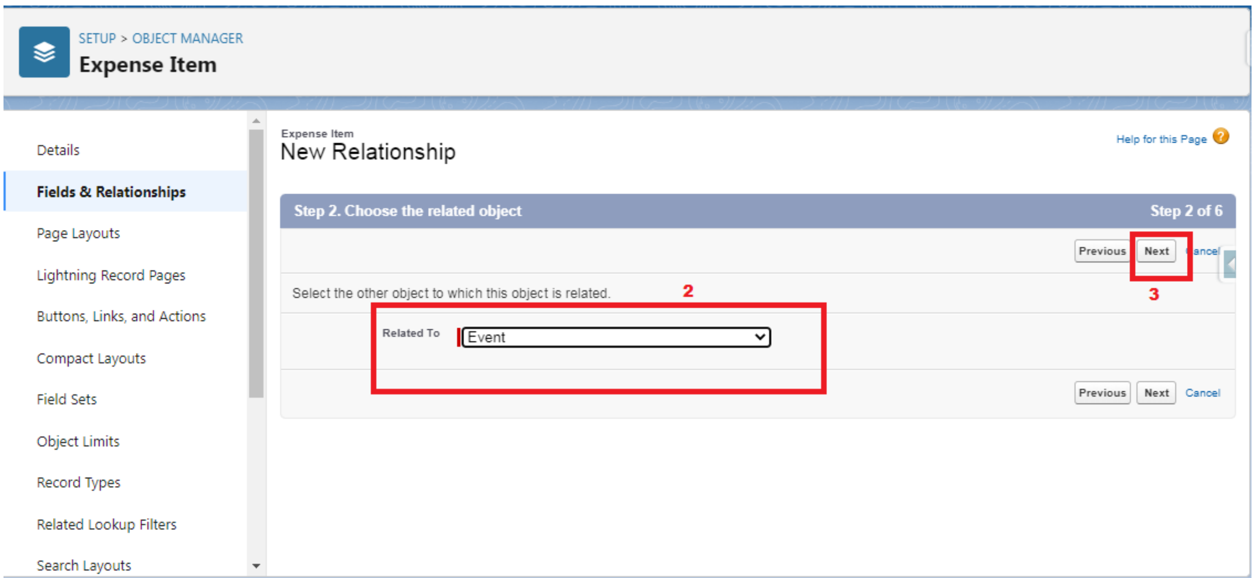
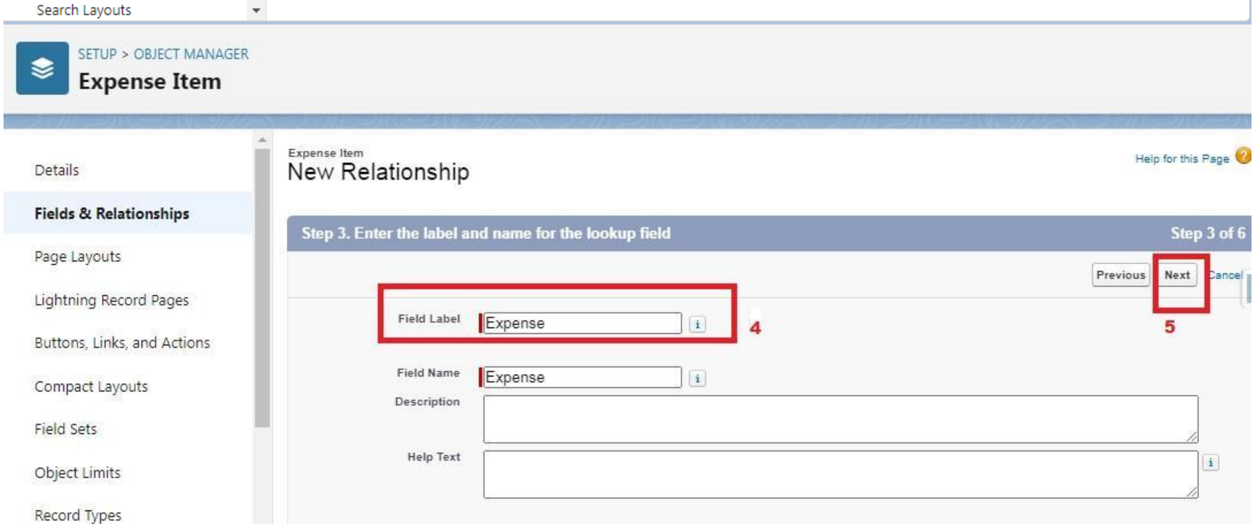




Roll Up Summary Fields On Expense Object

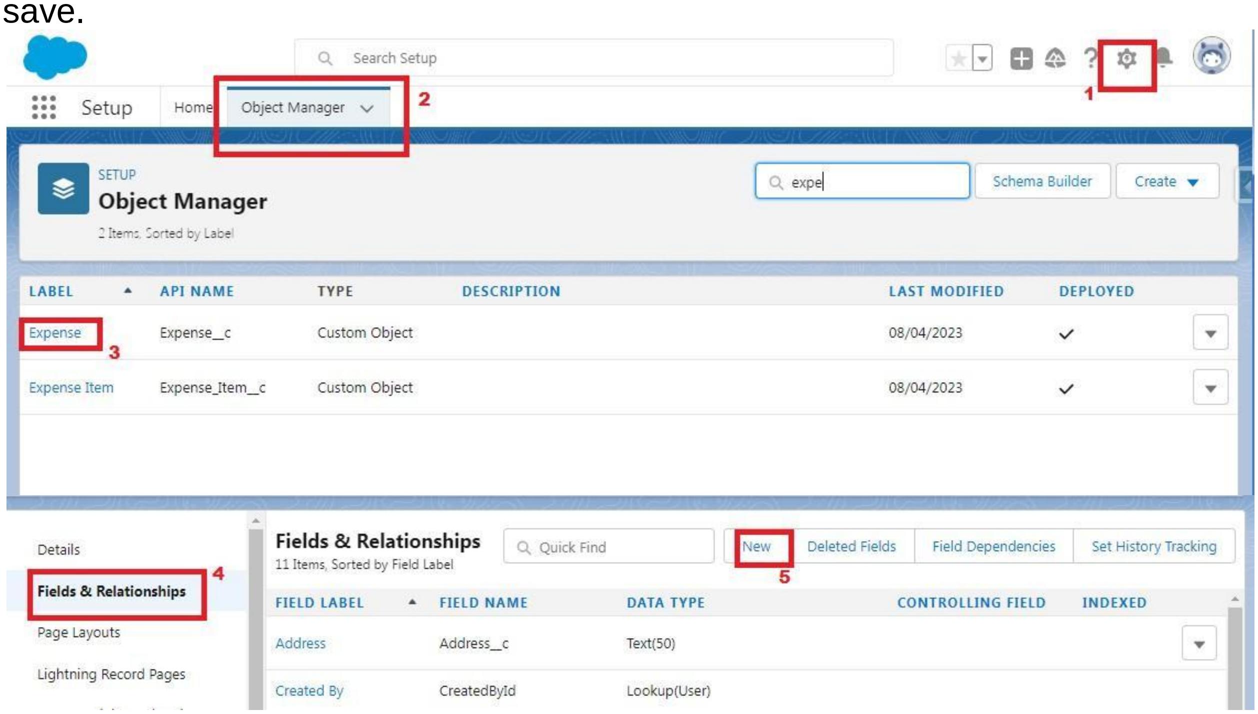
Let's create Roll-up summary fields on Expense Object to calculate the expense

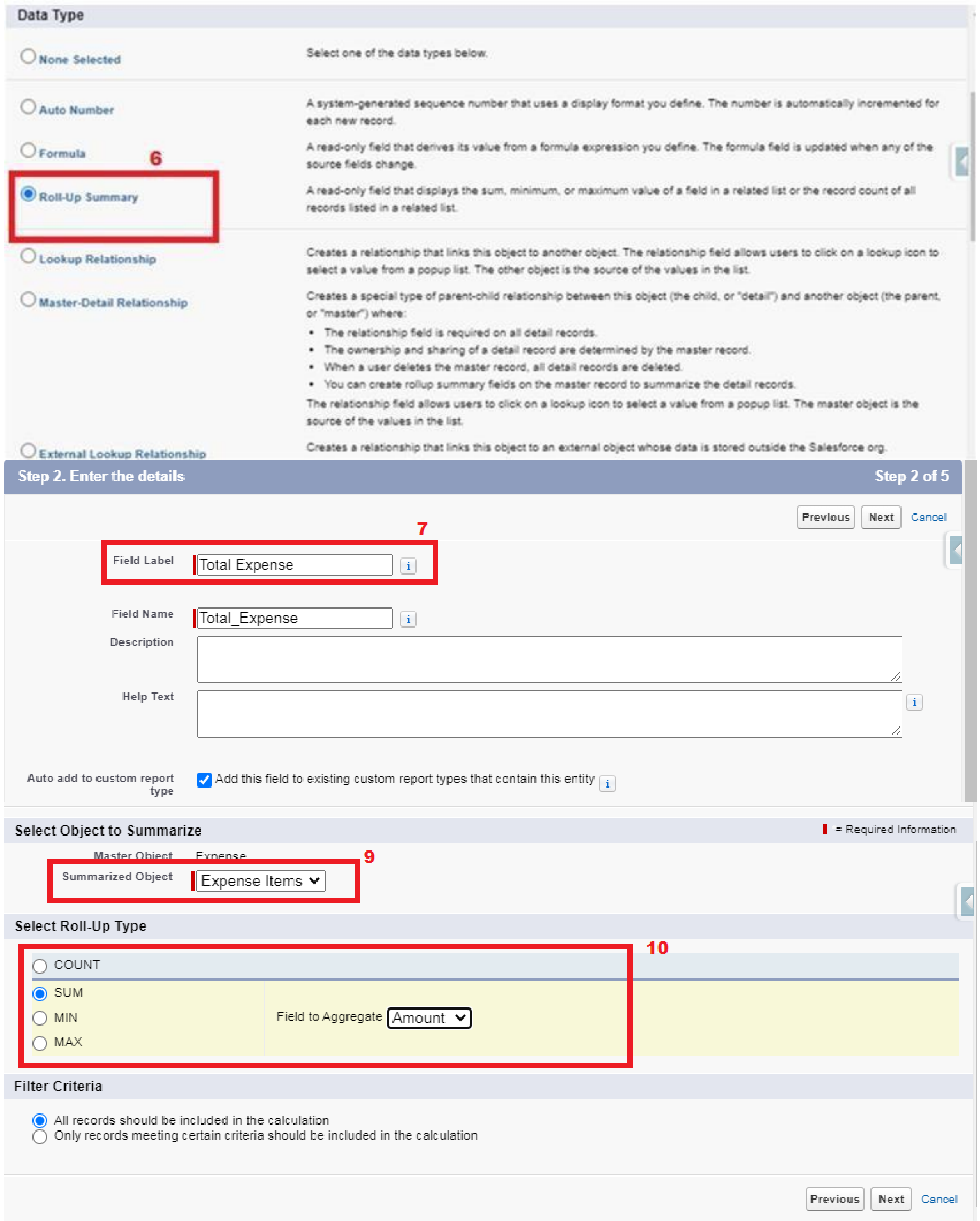
1. **Click the gear icon Select Setup, This launches Setup in a new tab.**
2. **click Object Manager**
3. **Select Expense.**
4. **Click Fields & Relationships**
5. **Click New.**

Select the Roll-up summary field as the data type
Enter the field label as Total Expense

Click Next
Then select the master object summarized as Expense items

Select Sum as roll-up and Field to aggregate Amount then click Next, Next and save.




Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
6
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Step 2. Enter the details
Step 2 of 5
Previous
Next
Cancel
7
Field Label
Total Expense
Field Name
Total_Expense
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Select Object to Summarize
= Required Information
Master Object
Expense
9
Summarized Object
Expense Items
Select Roll-Up Type
10
COUNT
SUM
MIN
MAX
Field to Aggregate
Amount
Filter Criteria
All records should be included in the calculation
Only records meeting certain criteria should be included in the calculation
Previous
Next
Cancel

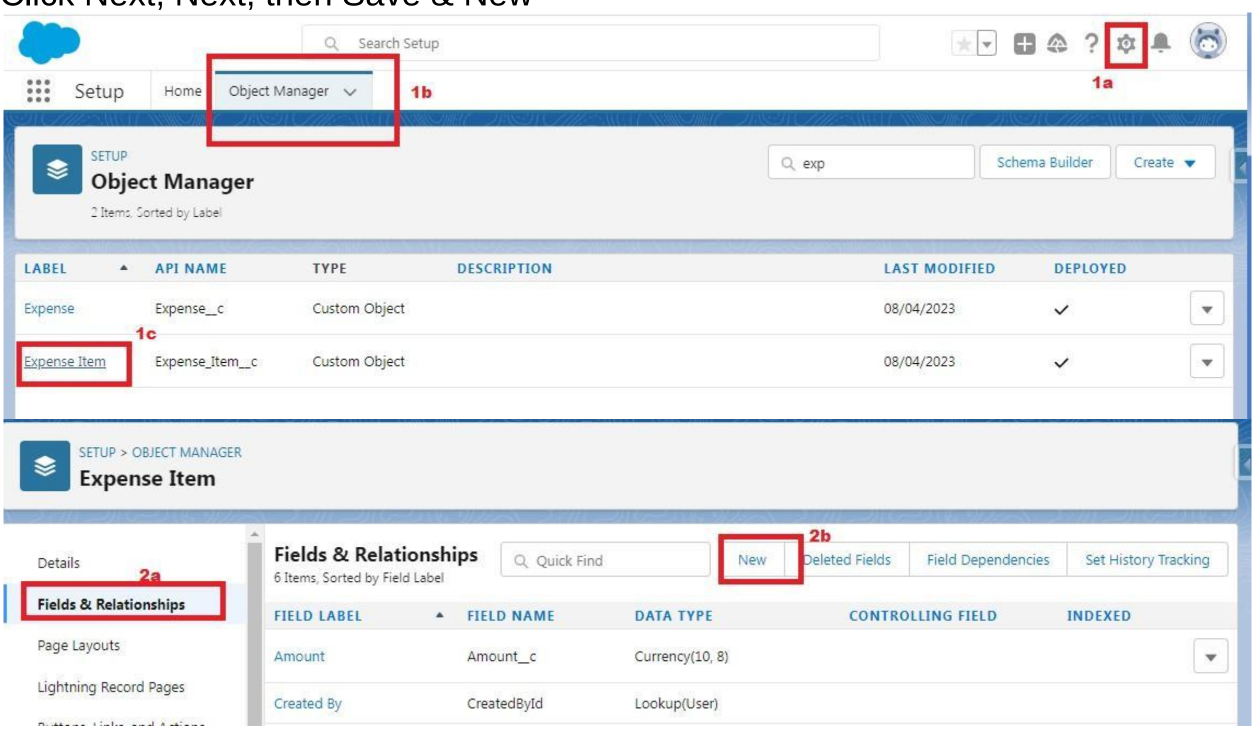
Pick List Field

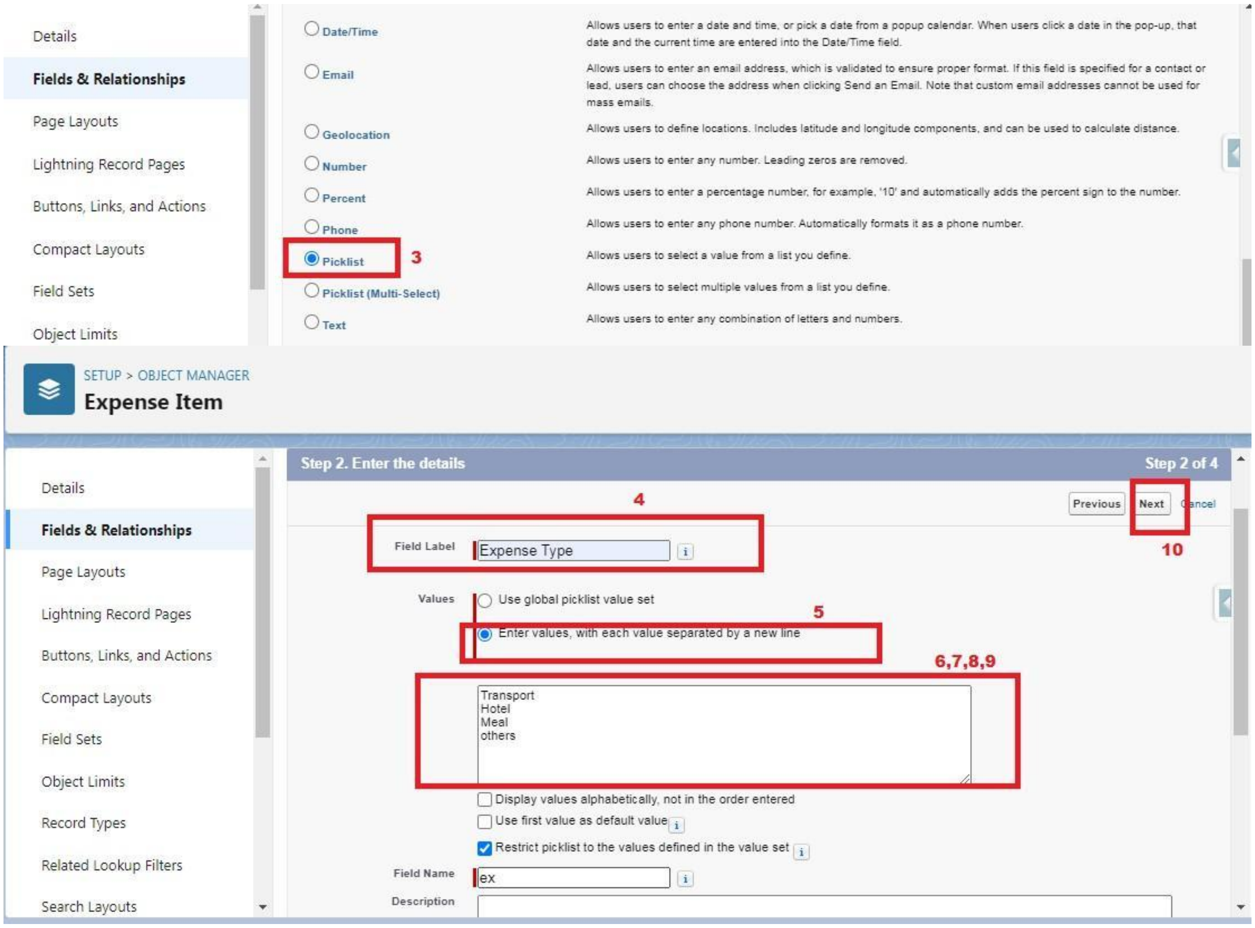
Let's create a Pick-List field:

1) From Setup, click Object Manager and select Expense Item.
2)Click Fields & Relationships, then New.
3)Select Picklist as the Data Type and click Next.
4)For Field Label enter Expense Type
5)Select Enter values, with each value separated by a new line, and enter these values:

- Transport
- Hotel
- Meal
- others

Click Next, Next, then Save & New



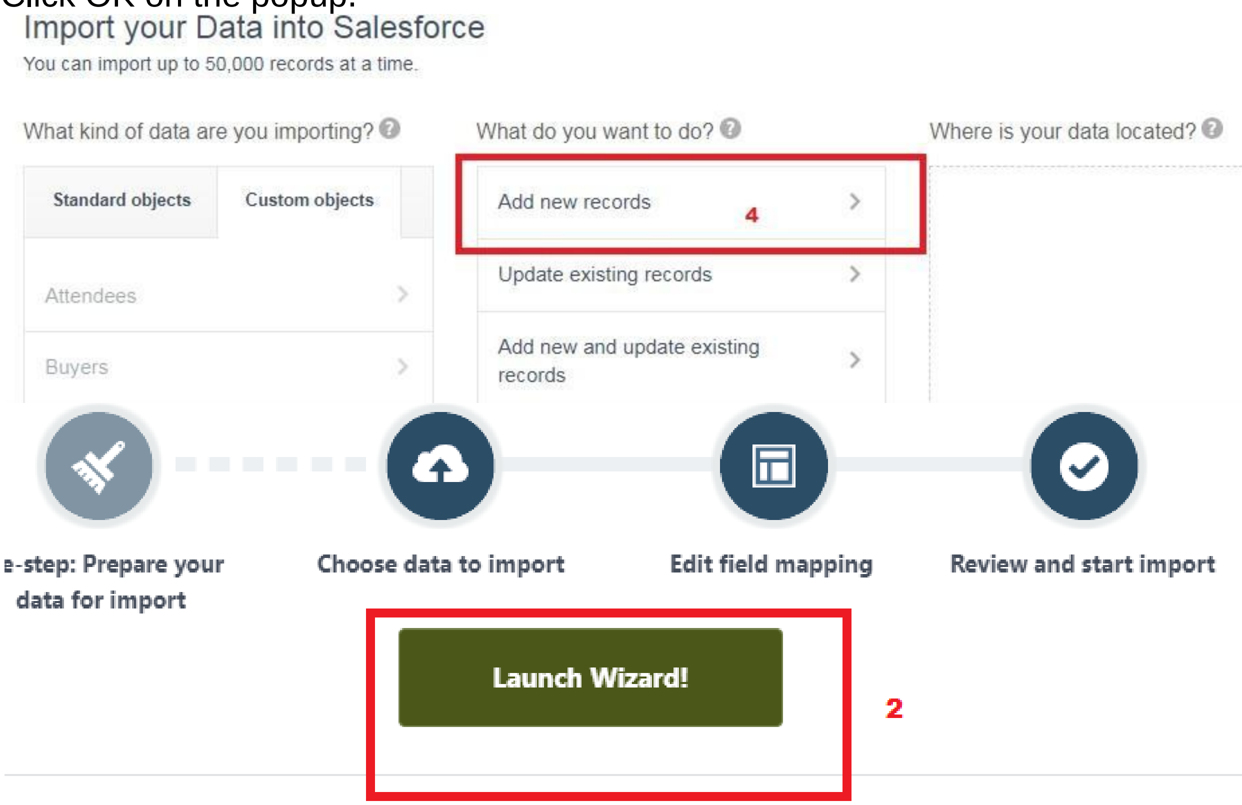

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
3
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
SETUP > OBJECT MANAGER
Expense Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Step 2. Enter the details
Step 2 of 4
4
Previous
Next
Cancel
10
Field Label
Expense Type
Values
Use global picklist value set
5
Enter values, with each value separated by a new line
6,7,8,9
Transport
Hotel
Meal
others
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
ex
Description

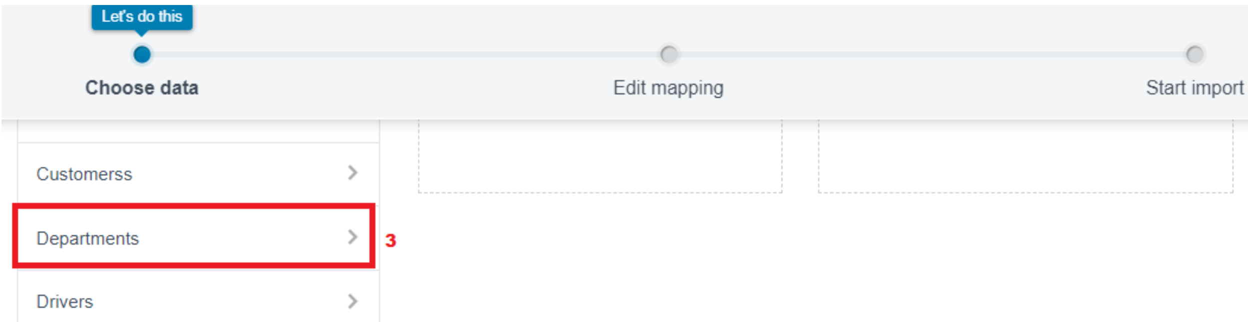
Import Departments

Data Import

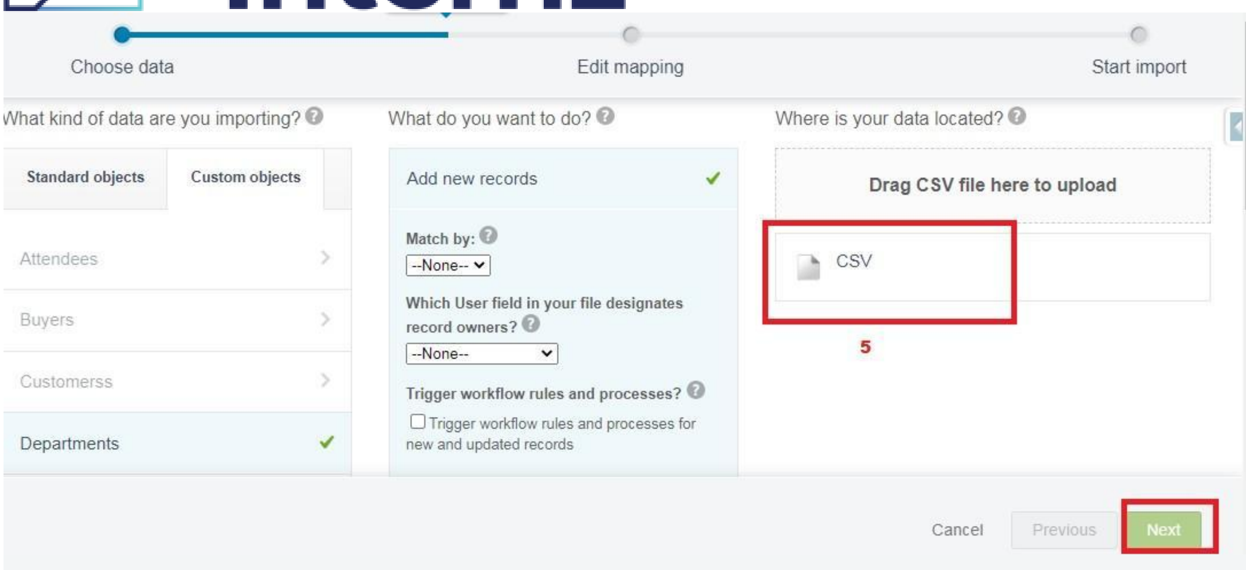
From Setup, click the Home tab.
1)In the Quick Find box, enter Data Import and select Data Import Wizard.
2)Click Launch Wizard!
3)Click the Custom Objects tab and select the Departments object.
4)Select Add new records.
5)Click CSV and choose file Department_CSV which we made earlier. Click Next.
6)Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

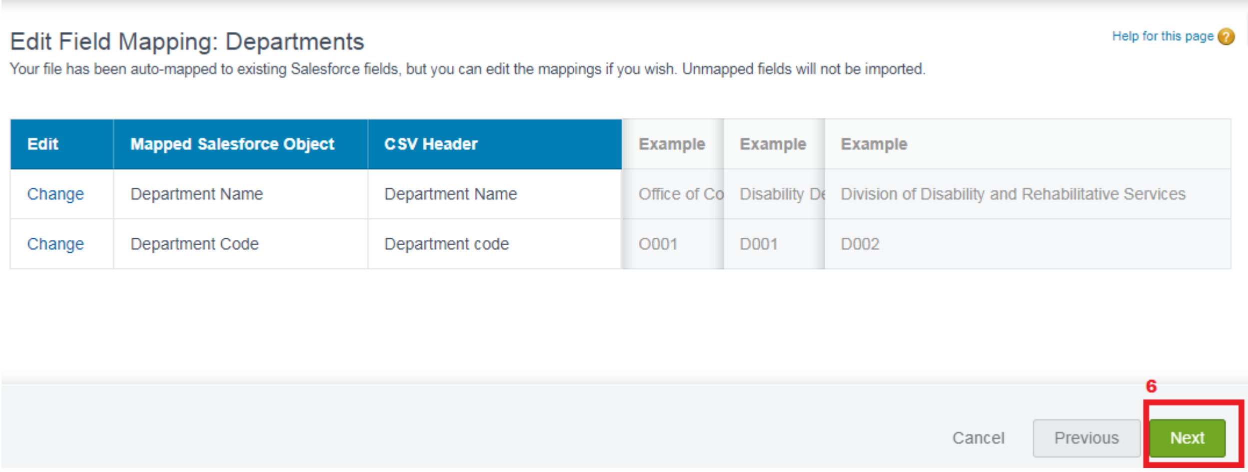
The next screen gives you a summary of your data import. Click Start Import. Click OK on the popup.

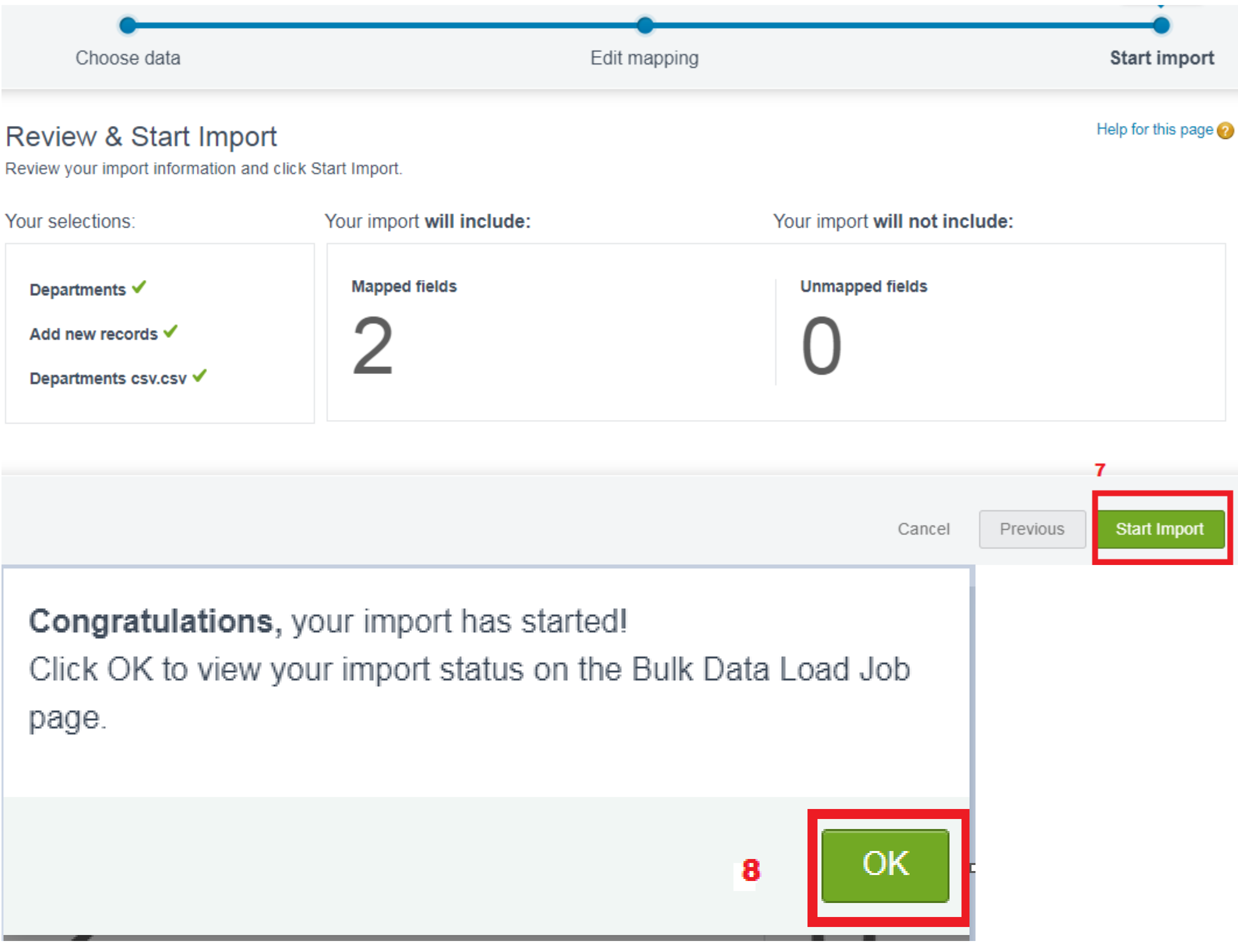




Smart Internz



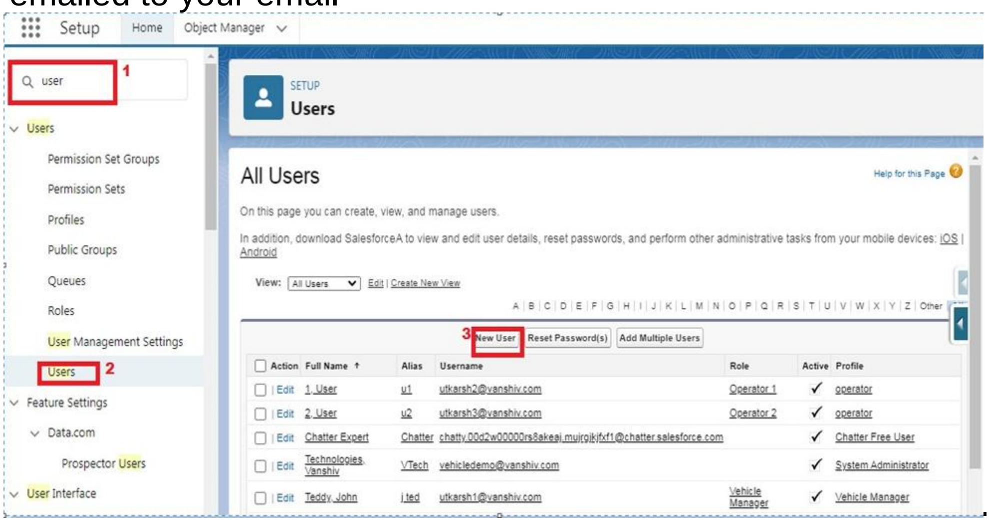


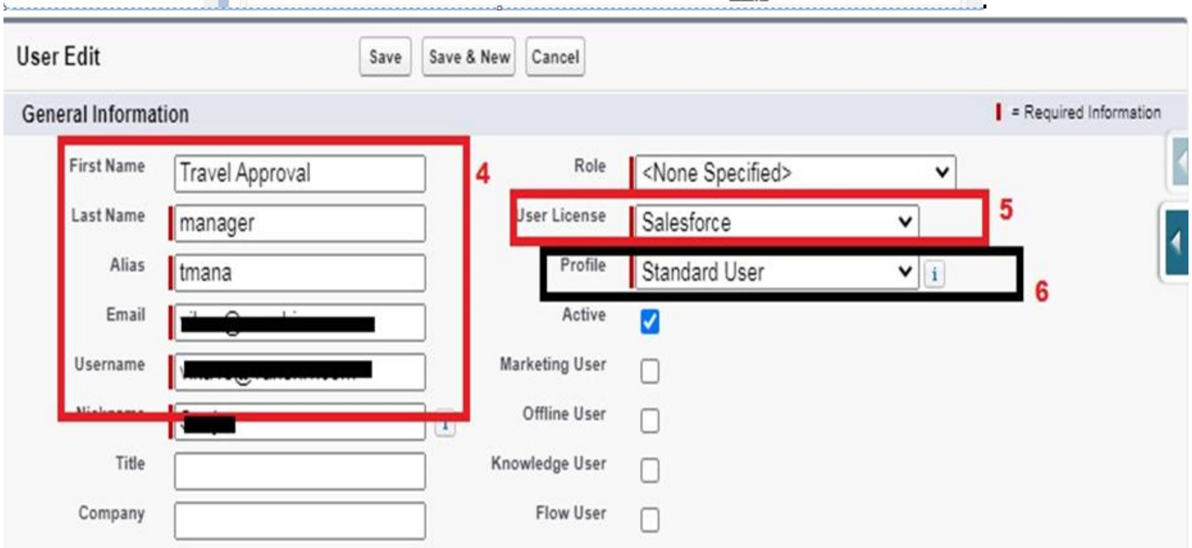

Choose data
Edit mapping
Start import
Review & Start Import
Help for this page
Review your import information and click Start Import.
Your selections:
Your import will include:
Your import will not include:
Departments
Add new records
Departments csv.csv
Mapped fields
2
Unmapped fields
0
7
Cancel
Previous
Start Import
Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.
8
OK

Users

Creating A User In Salesforce

1.From Setup, in the Quick Find box, enter Users.
2.Select Users.
3.Click New User.
4.Enter the First Name Travel Approval and Last Name manager and (Your) email address and a unique username in the
 form of an email address. By default, the username is the same as the email address.
5.Select a User License as Salesforce.
6.Select a profile as Standard user.
7.Check Generate new password and notify the user immediately to have the user’s login name and a temporary password
 emailed to your email

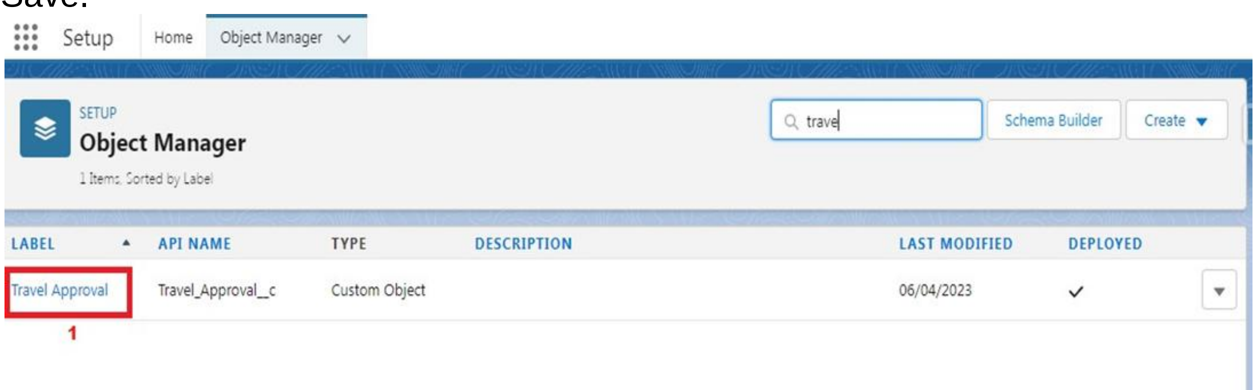


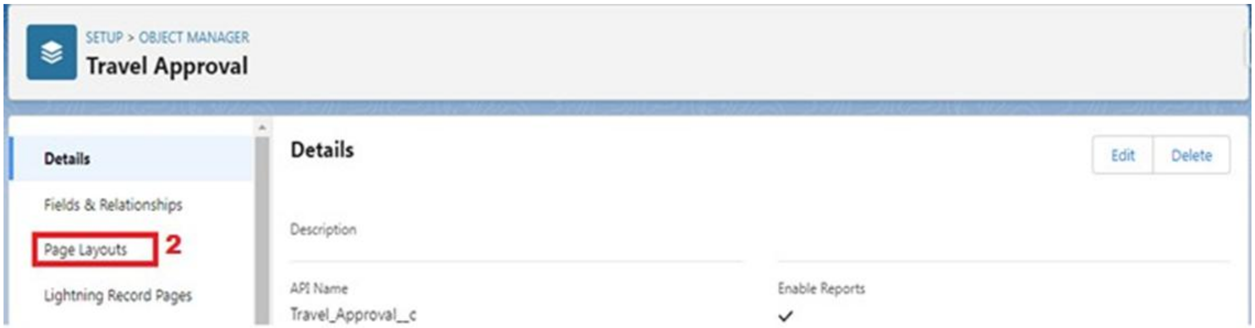


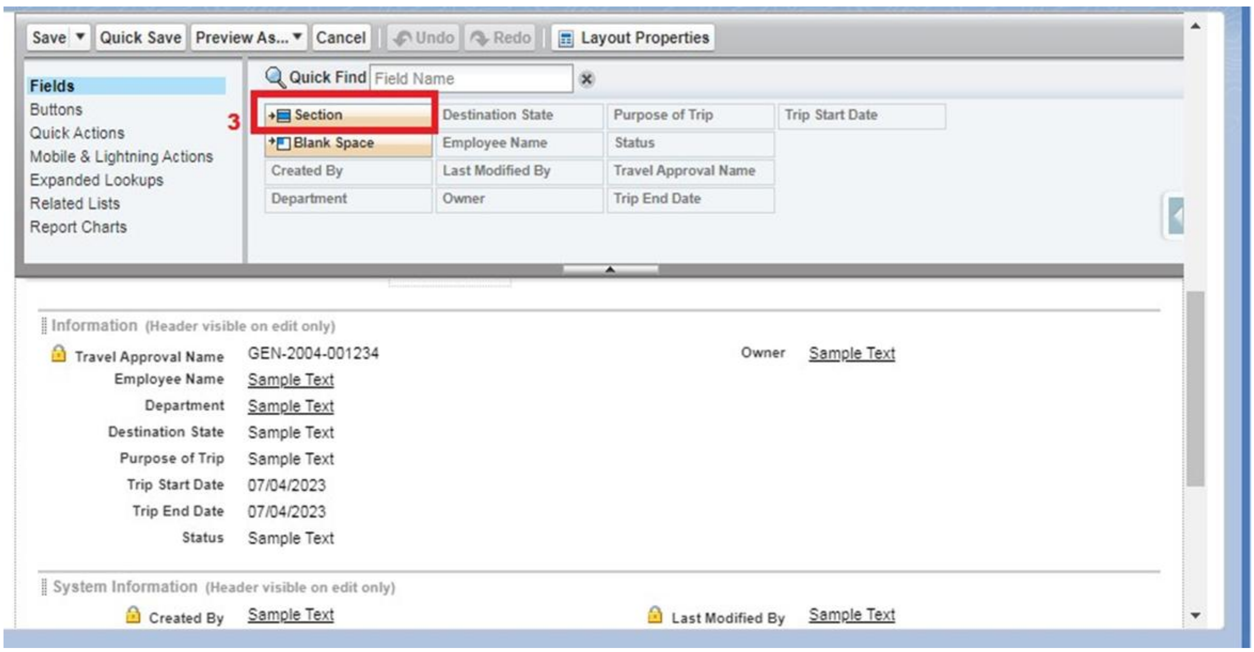
Use Customization

Customize Travel Approval Object Page Layout

1. From the Object Manager, search for the Travel approval object
2. click on page layouts and click Travel Approval Layout
3. Drag the Section from the top pane to the lower pane directly below the Information section. When dragging over the
  page, you get a visual indicator of where you can drop the new section.
4. Name the section Trip Info, leave the rest of the settings at their default values, and
5. Then click on OK.
6. Drag Trip Start Date and Trip End Date, Status from the top pane into the left-hand column of the Trip Info
  section.
7. Drag the Destination State and Purpose of a trip from, department the top pane into the right-hand column of the Trip
  Info section.
8. Click
Save.




SETUP > OBJECT MANAGER
Travel Approval
Details
Fields & Relationships
Page Layouts
2
Lightning Record Pages
Details
Edit
Delete
Description
API Name
Travel_Approval__c
Enable Reports

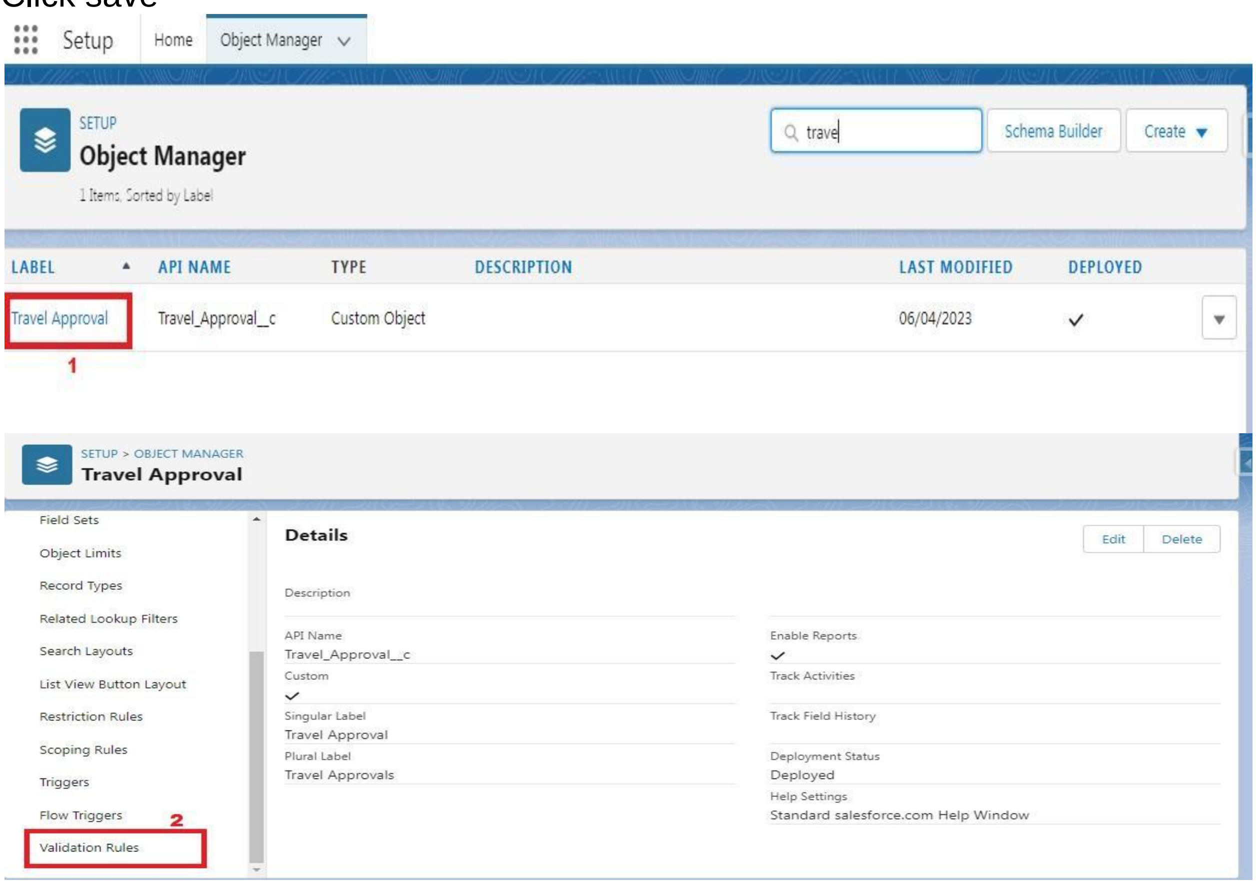

Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Field Name
3
Section
Blank Space
Created By
Department
Destination State
Employee Name
Last Modified By
Owner
Purpose of Trip
Status
Travel Approval Name
Trip End Date
Trip Start Date
Information (Header visible on edit only)
Travel Approval Name GEN-2004-001234
Owner Sample Text
Employee Name Sample Text
Department Sample Text
Destination State Sample Text
Purpose of Trip Sample Text
Trip Start Date 07/04/2023
Trip End Date 07/04/2023
Status Sample Text
System Information (Header visible on edit only)
Created By Sample Text
Last Modified By Sample Text

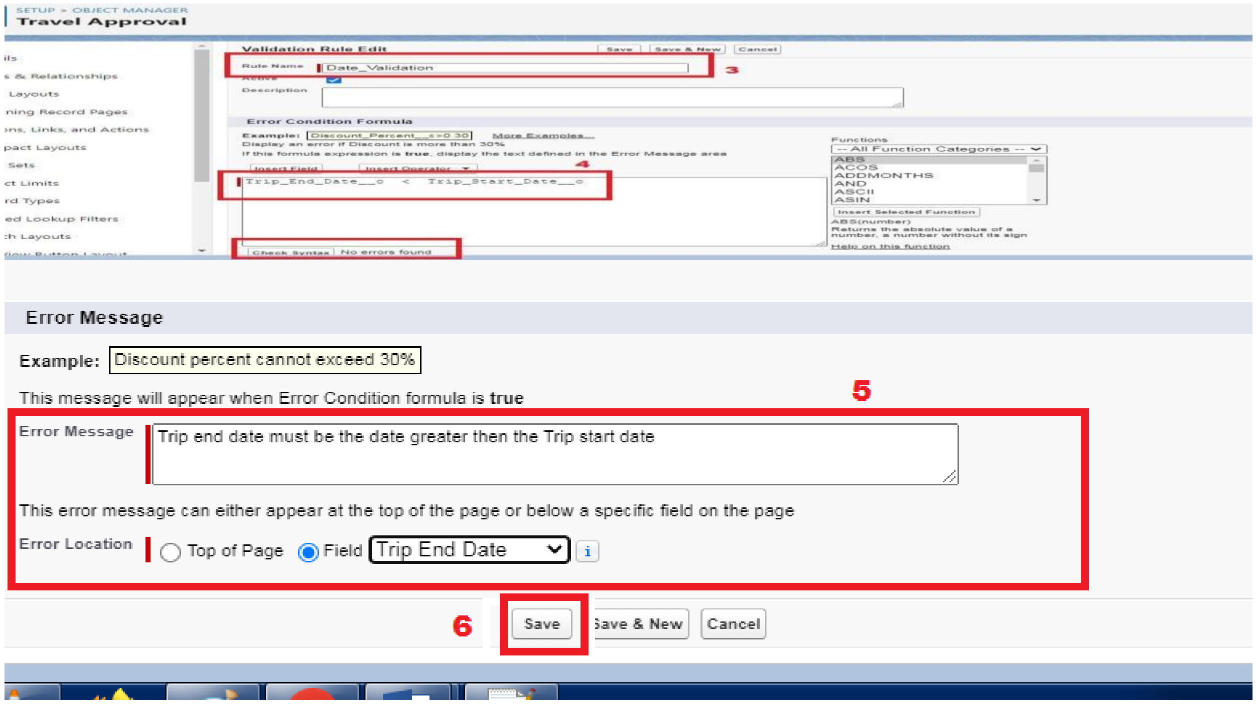
Add Business Logic To Travel App

Create Validation Rule

Search for the travel approval object from the object manager and open the object.
1)Click on validation rules and click new on the left corner
2)Give your rule name Date _Validation and make sure that the rule is set to active.
3)In the error condition formula enter Trip_End_Date c < Trip_Start_Date   c
NOTE- Make sure that there is no syntax error after you input this error condition

Give the Error message – “Trip end date must be the date greater than the Trip start date” &
For error location select the field and pick the Trip end date as the location for error.
Click save





Create Formulae Fields

Create Formula Fields
1)First, we need to upload a zip file to your Salesforce environment that contains all the images we use. You should have 2)a file titled StatusImages.zip.
3)Click the setup
4)Click Static Resources in Quick Find & Click New.
5)Enter the following values for your static resource

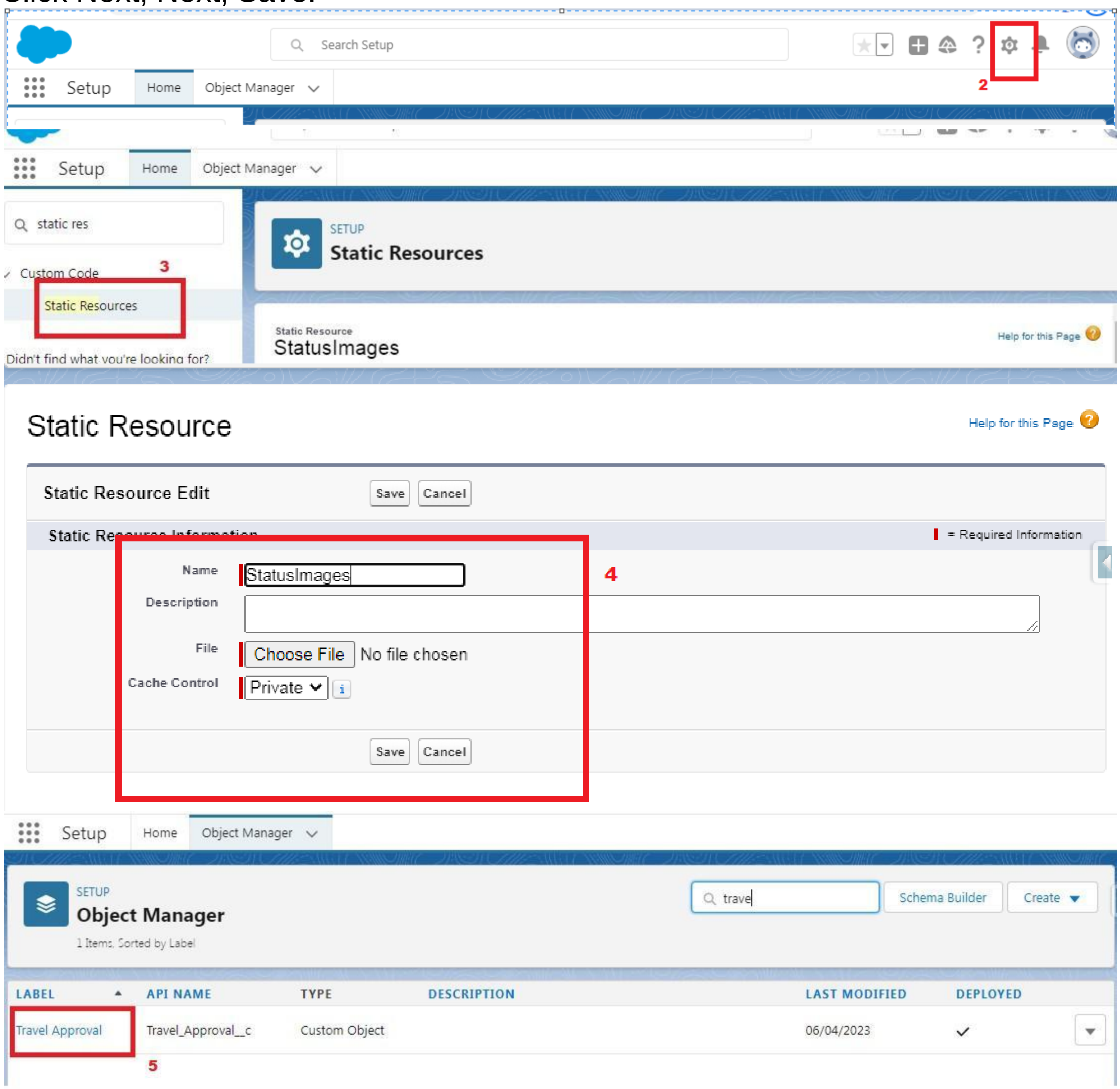
Parameter	Value
Name	StatusImages
File	StatusImages.zip
Cache-Control	Private

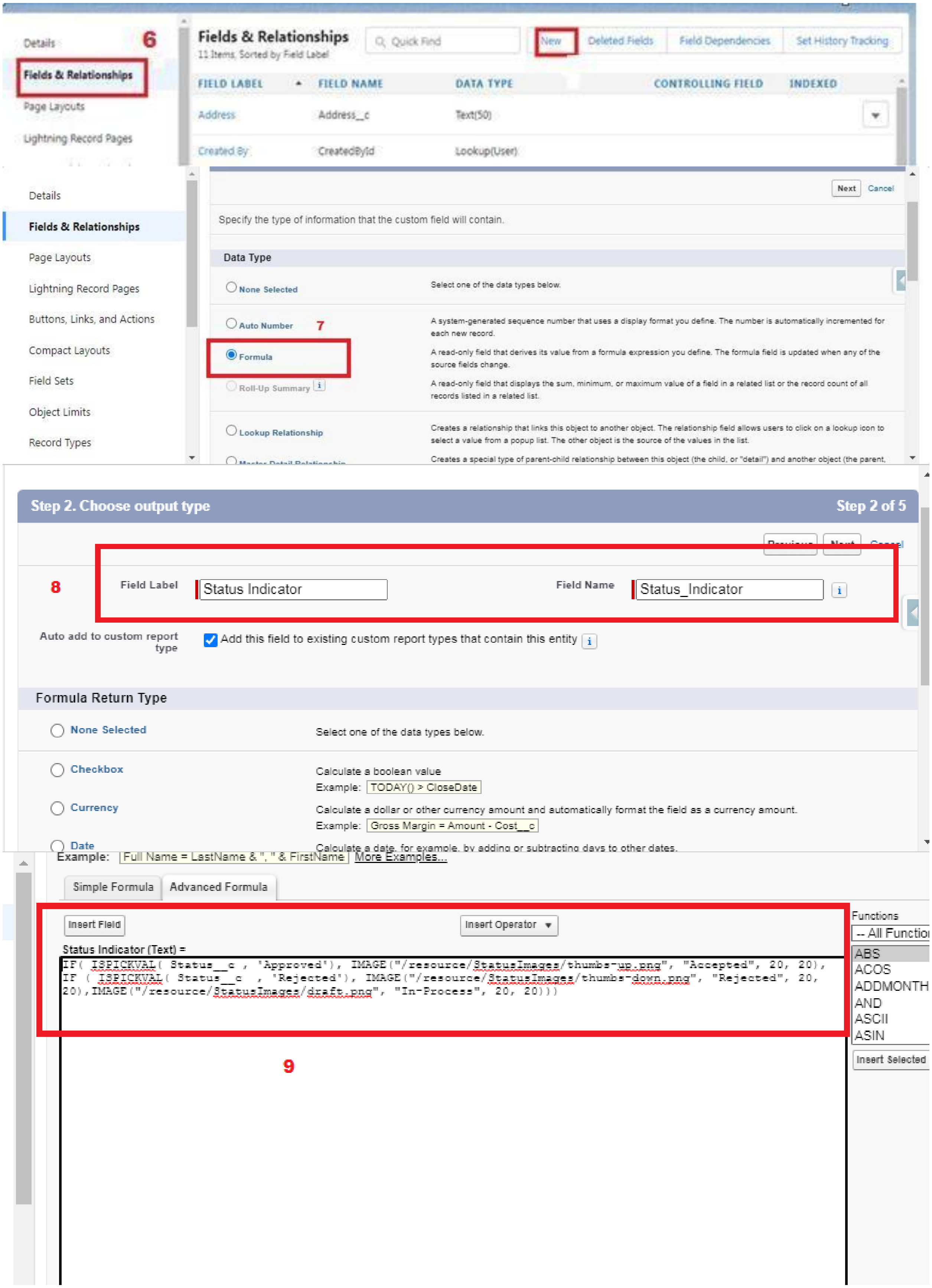
Now select the travel approval object.
Select Fields & Relationships, Click New
Select Formula data type, and Click Next.
Enter the following values:
Field Label: Status Indicator
Field Name: Status_Indicator (This automatically gets sent when you tab out of the Field Label field)
Formula Return Type: Tex

Click next & Copy and paste the following formula into the formula editor.

IF(ISPICKVAL(Status c c, 'Approved'),
IMAGE("/resource/StatusImages/thumbs-up.png", "Accepted", 20, 20),
IF (ISPICKVAL(Status c c, 'Rejected'),
IMAGE("/resource/StatusImages/thumbs-down.png", "Rejected", 20, 20),
IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))

Click Next, Next, Save.



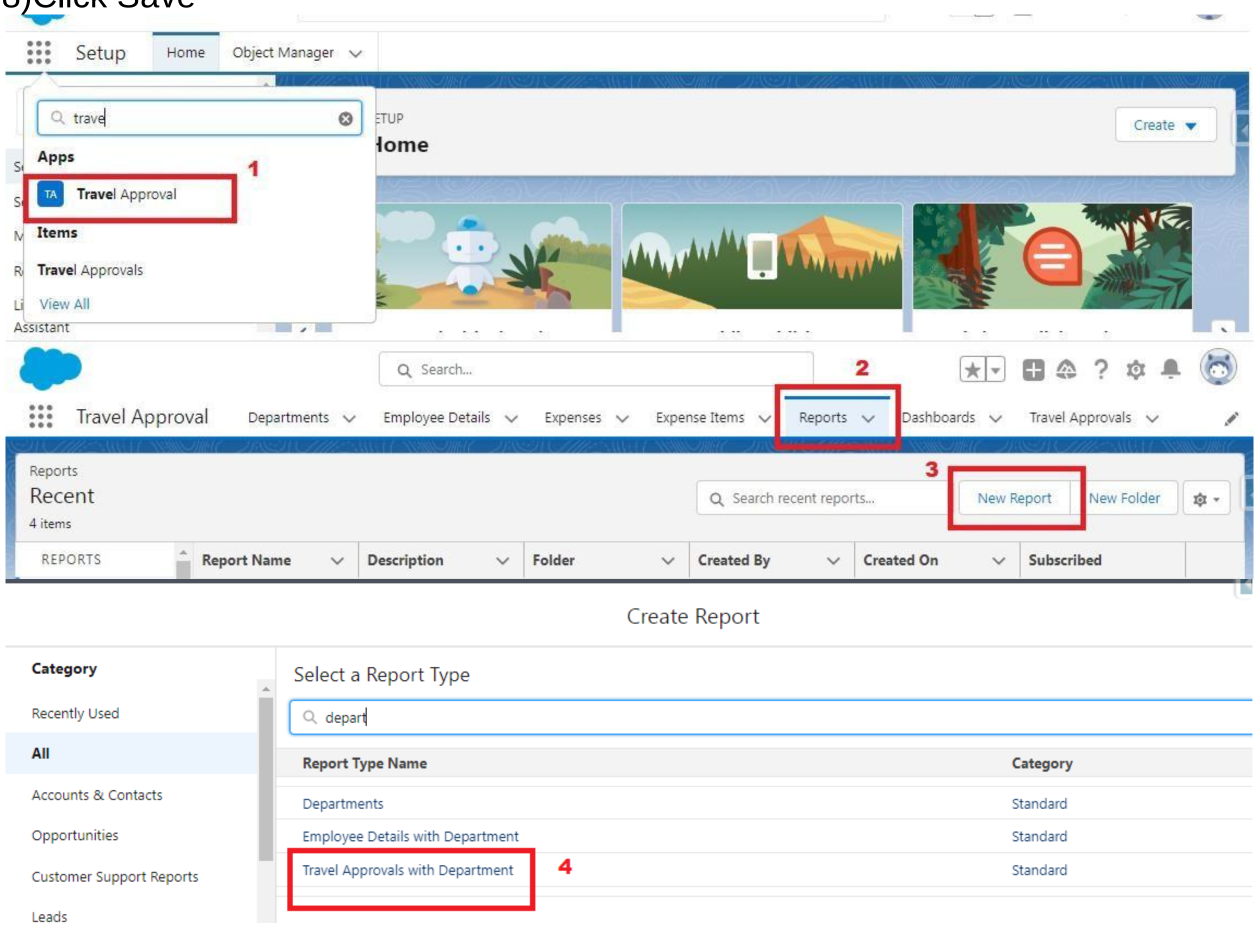

Details
6
Fields & Relationships
Page Layouts
Lightning Record Pages
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Address
Address_c
Text(50)
Created By
CreatedById
Lookup(User)
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
7
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent,
Step 2. Choose output type
Step 2 of 5
8
Field Label
Status Indicator
Field Name
Status_Indicator
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Full Name = LastName & ", " & FirstName More Examples...
Simple Formula
Advanced Formula
Insert Field
Insert Operator
Status Indicator (Text) =
IF(ISPICKVAL(Status__c , 'Approved'), IMAGE("/resource/StatusImages/thumbs-up.png", "Accepted", 20, 20),
IF (ISPICKVAL(Status__c , 'Rejected'), IMAGE("/resource/StatusImages/thumbs-down.png", "Rejected", 20,
20),IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))
9
Functions
-- All Functio
ABS
ACOS
ADDMONTH
AND
ASCII
ASIN
Insert Selected

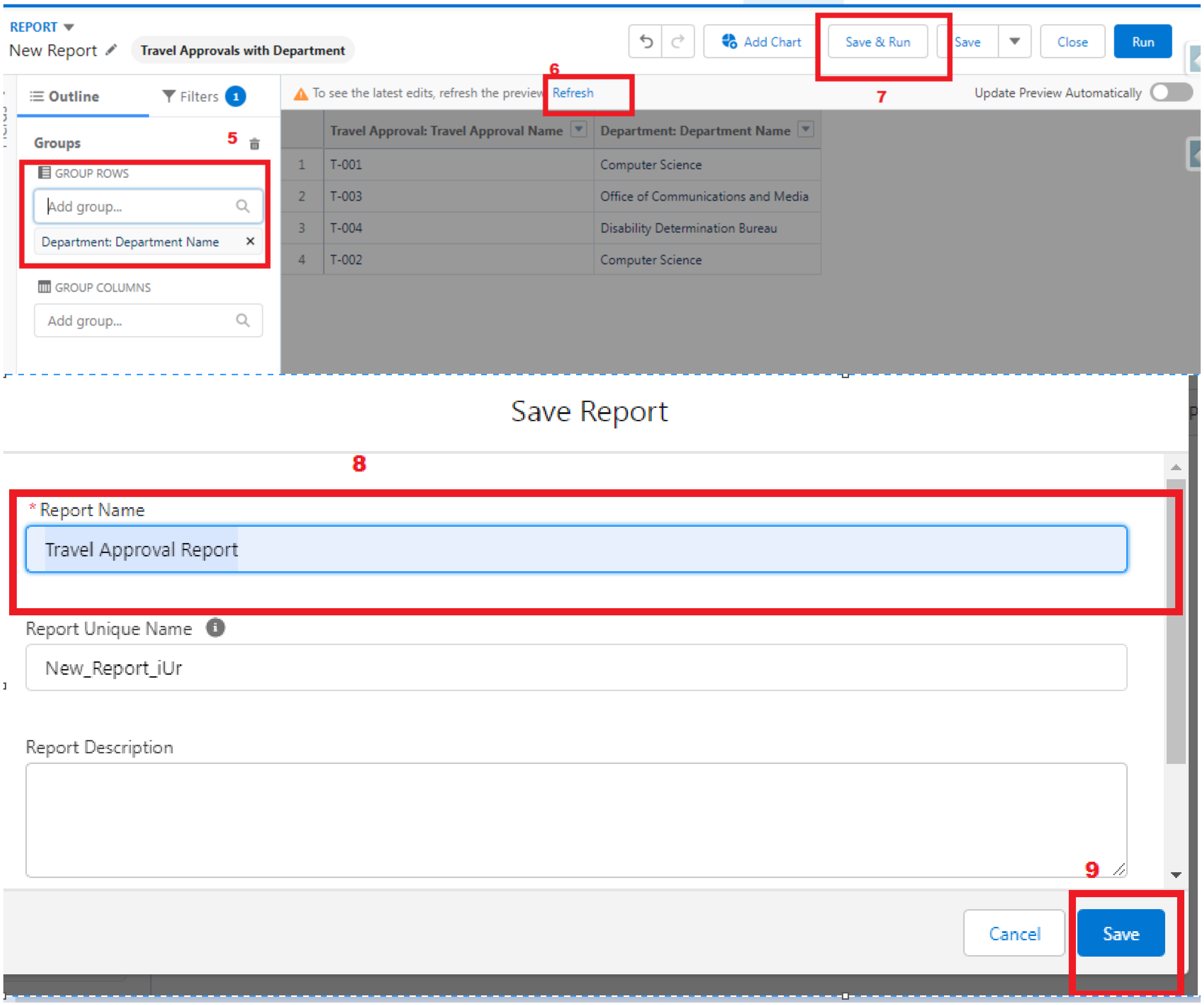
User Adoption - Create Record

Create Record

Click App Launcher and select Travel Approval App

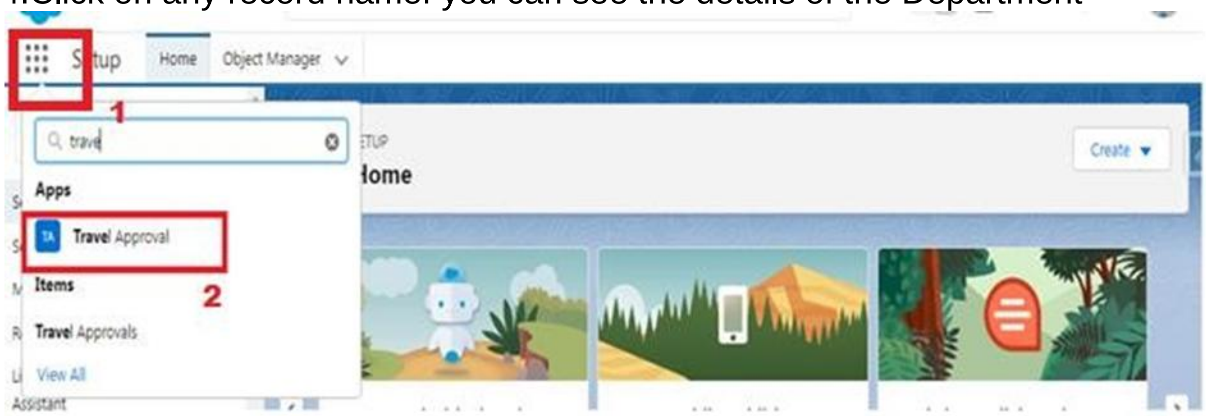
1)Click reports tab
2)Click New Report.
3)Click the report type as Travel approval with Departments Click Start report.
4)Customize your report, in group rows select - Department Name
5)Click refresh
6)Click save and run
7)Give report name – Travel Approval Report
8)Click Save

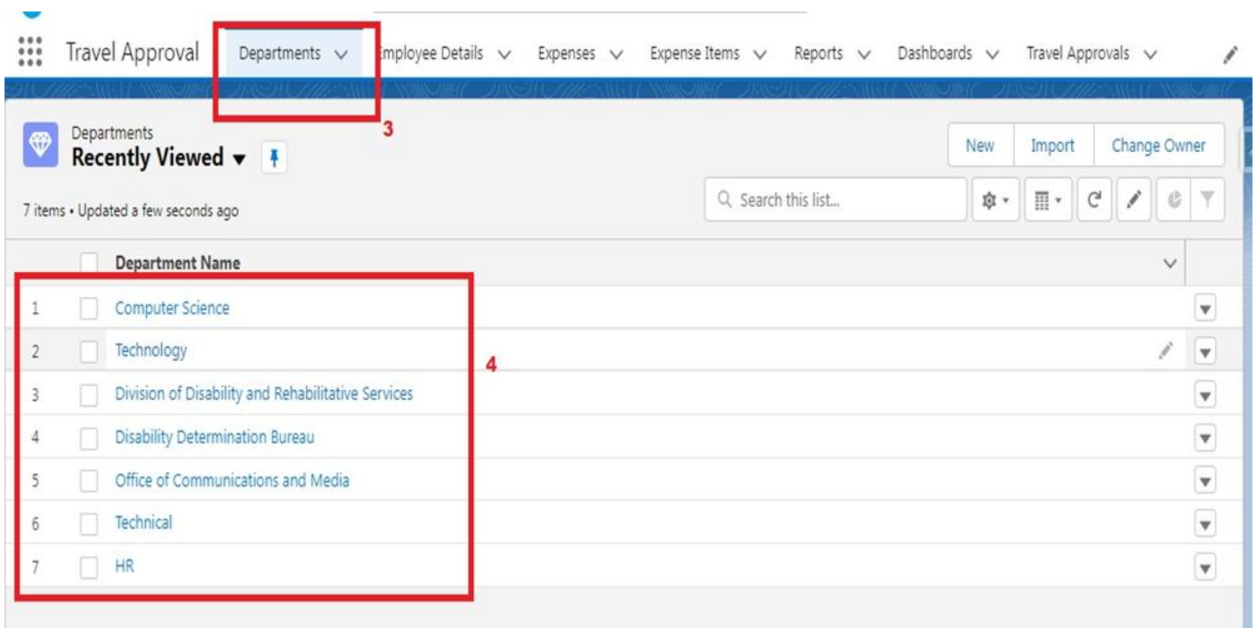



REPORT
New Report
Travel Approvals with Department
Add Chart
Save & Run
Save
Close
Run
6
7
To see the latest edits, refresh the preview
Refresh
Update Preview Automatically
Outline
Filters 1
Groups
5
GROUP ROWS
Add group...
Department: Department Name
GROUP COLUMNS
Add group...
Travel Approval: Travel Approval Name
Department: Department Name
1 T-001 Computer Science
2 T-003 Office of Communications and Media
3 T-004 Disability Determination Bureau
4 T-002 Computer Science
Save Report
8
* Report Name
Travel Approval Report
Report Unique Name
New_Report_iUr
Report Description
9
Cancel
Save

View Record

View Record (Department):
1.Click on App Launcher on left side of screen.
2.Search Travel Approval & click on it.
3.Click on Department Tab.
4.Click on any record name. you can see the details of the Department

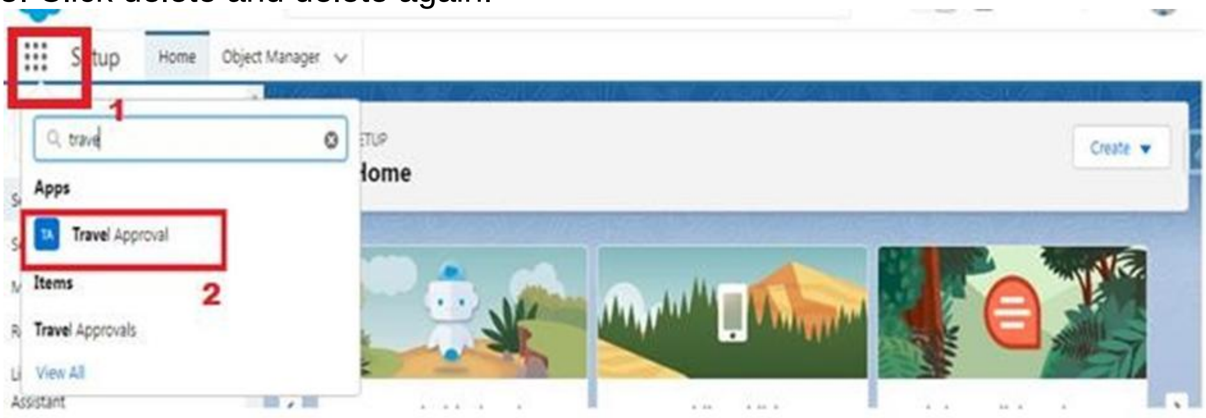


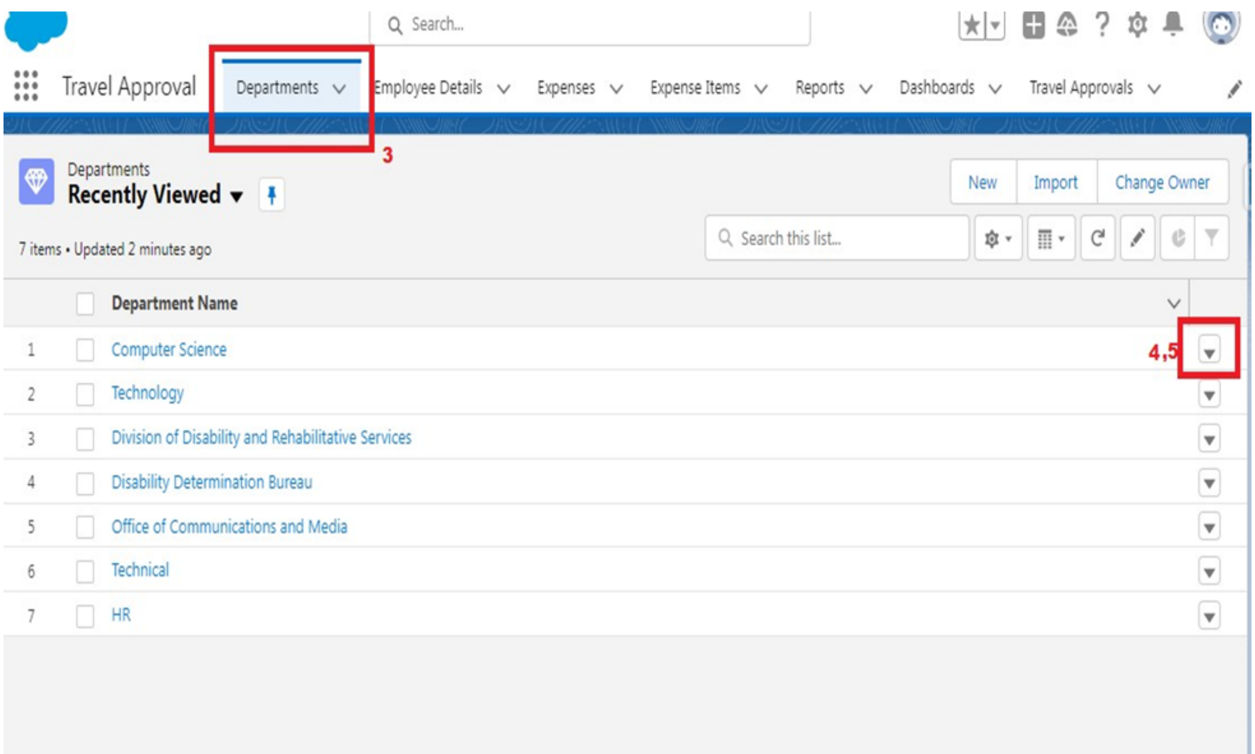


Delete Record

Delete Record (Department):

1. Click on App Launcher on the left side of the screen.
2. Search Travel Approval & click on it.
3. Click on Department Tab.
4. Click on Arrow at the right-hand side on that particular record.
5. Click delete and delete again.

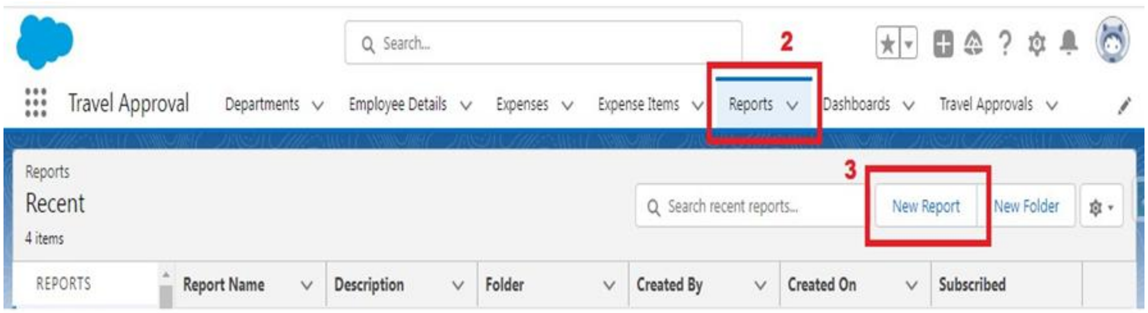


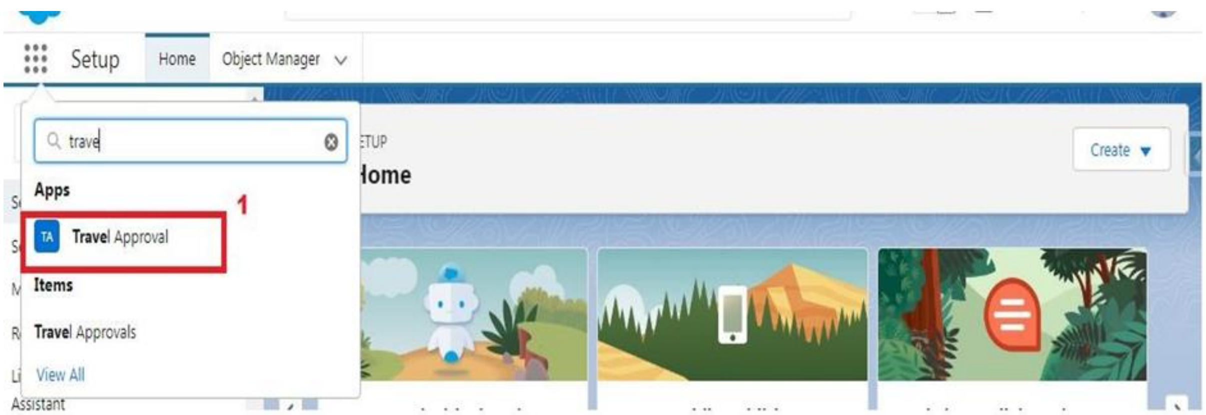


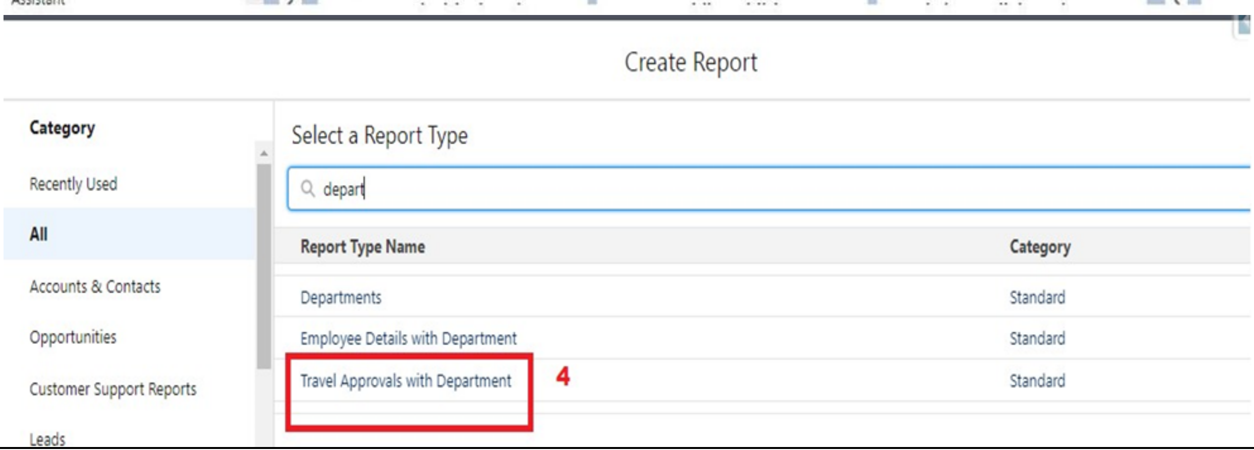
What Are Reports?

Create Report

1. Click App Launcher and select Travel Approval App
2. Click reports tab
3. Click New Report.
4. Click the report type as Travel Approval with Departments Click Start Report.
5. Customize your report, in group rows select - Department Name
6. Click Refresh
7. Click save and run
8. Give report name – Travel Approval Report
9. Click Save

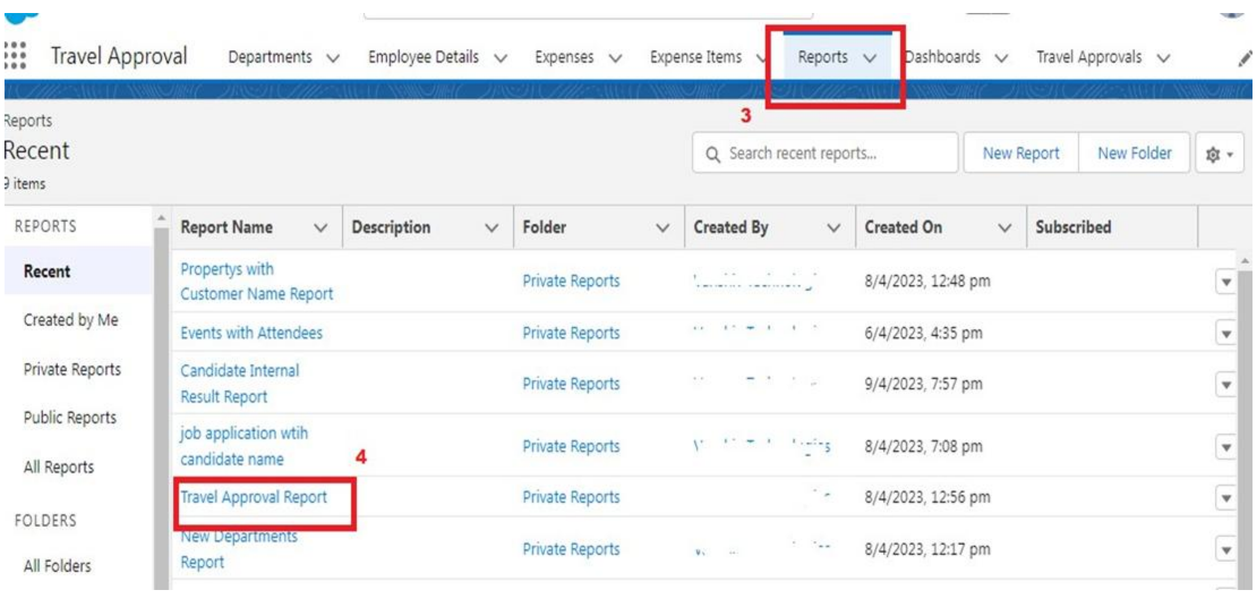






View Report

1.Click on App Launcher on left side of screen.
2.Search Travel Approval App & click on it.
3.Click on Reports Tab.
4.Click on Travel Approval Report and see records.

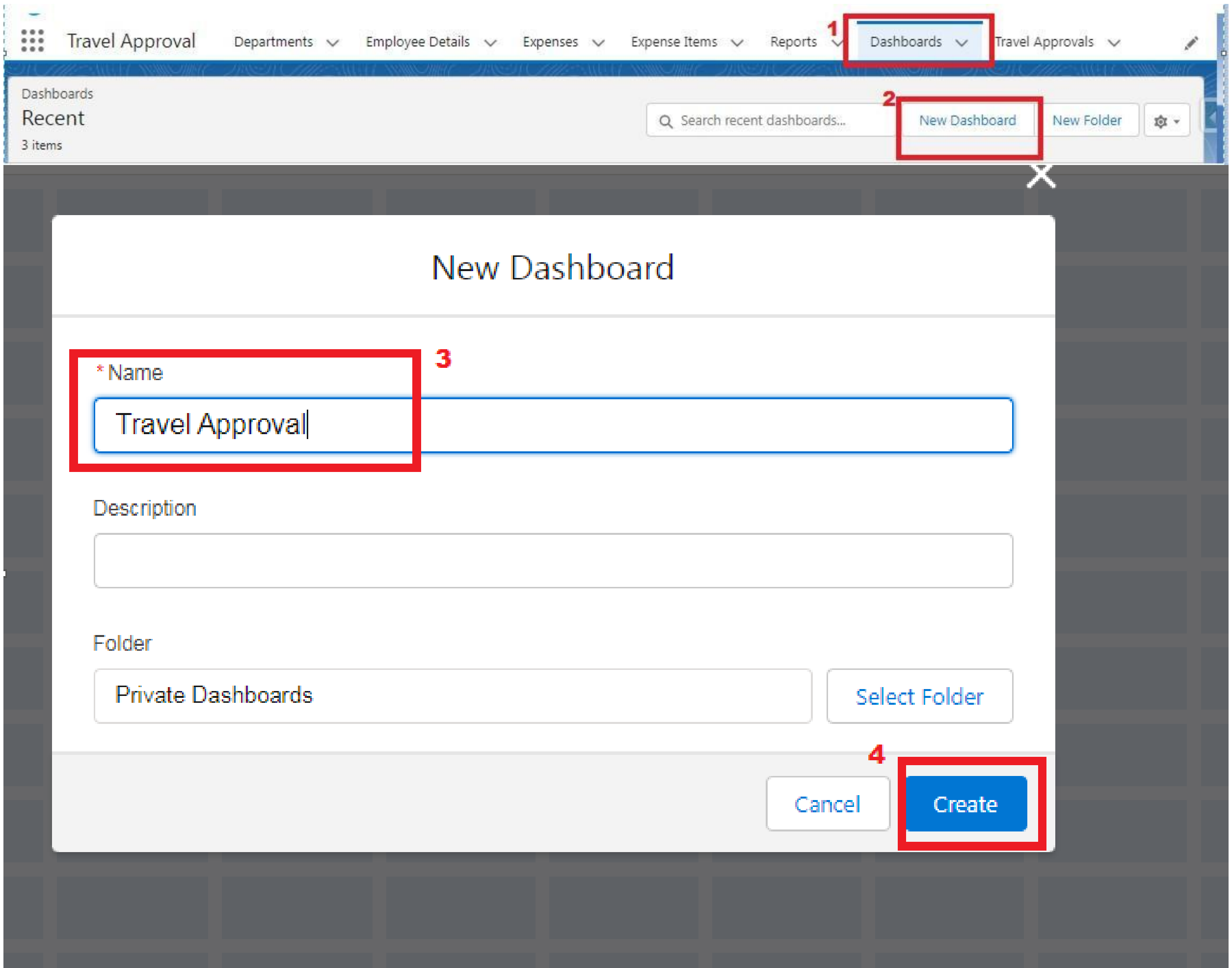


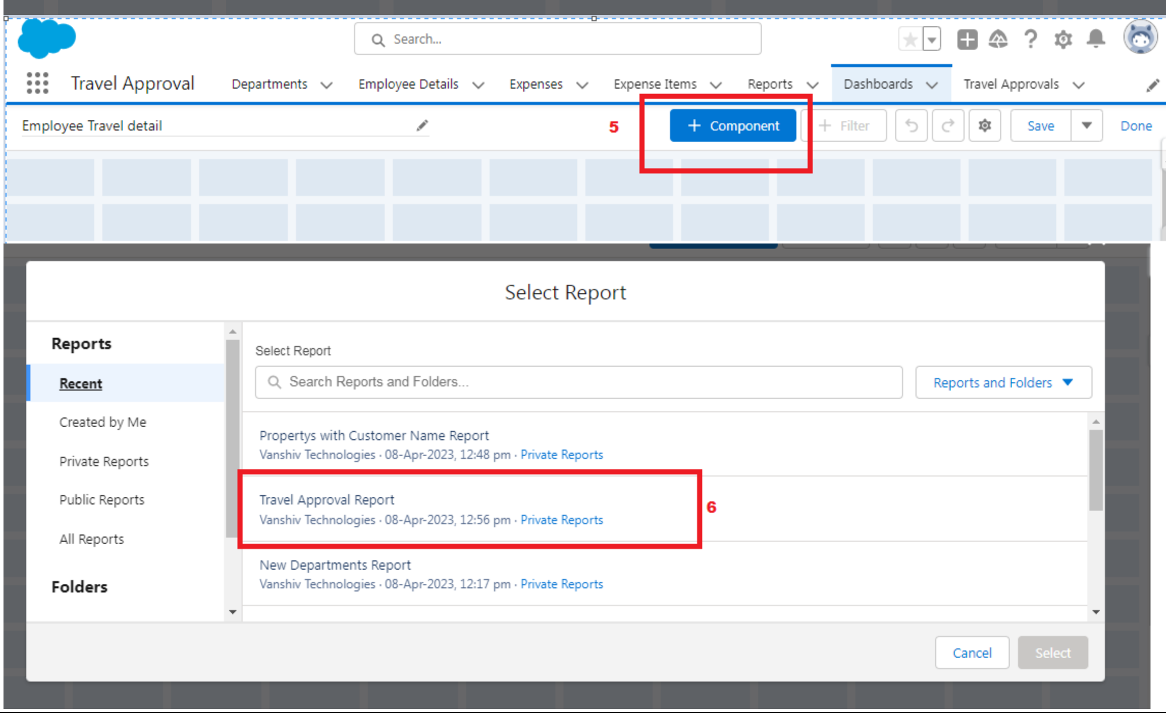
Dashboards

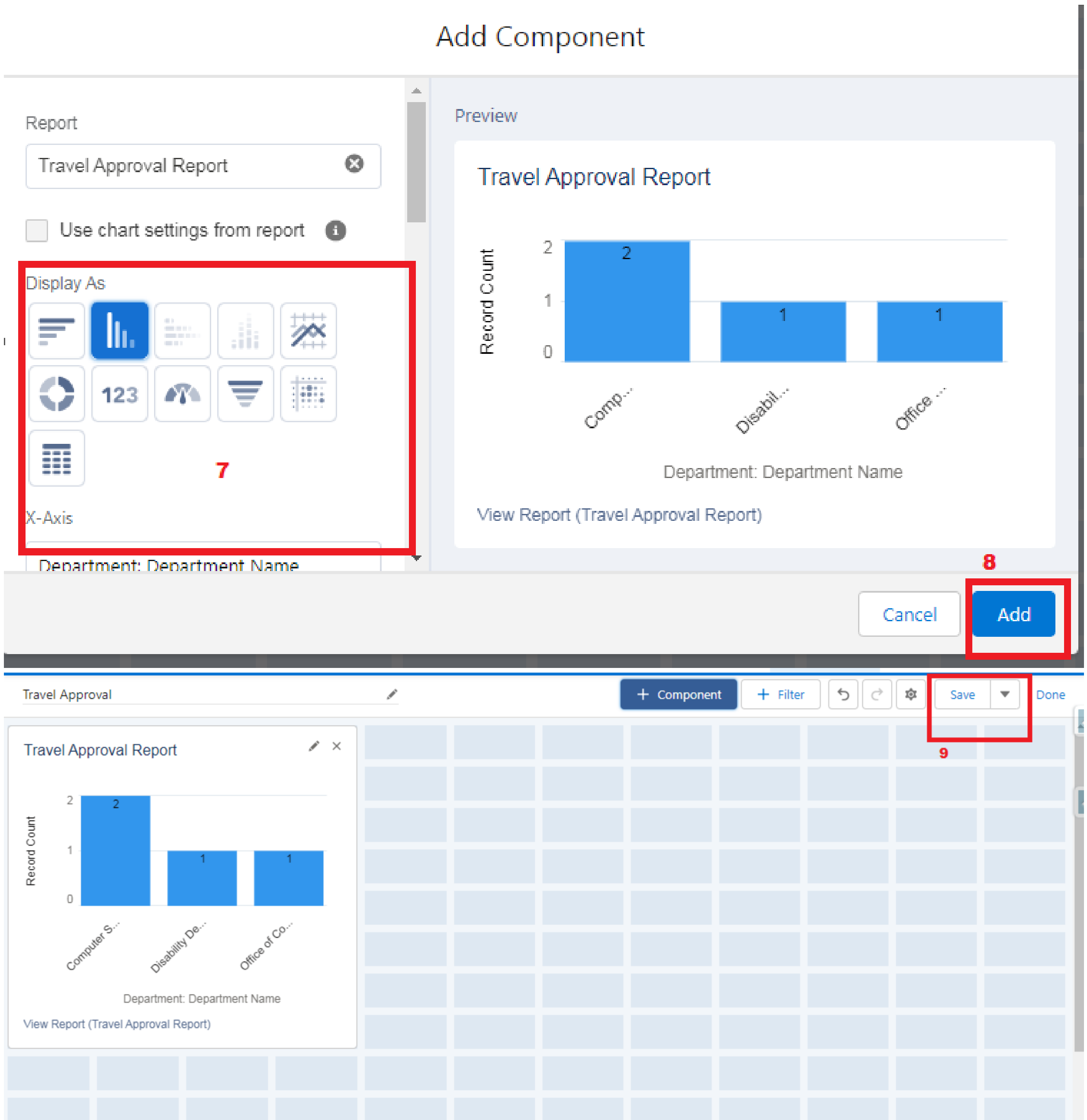
Create Dashboard

Click on the Dashboards tab from the travel approval application,
Click on a new dashboard
Give name- Travel Approval
Click Create
Give your dashboard a name and click on +component,

select the Travel Approval Report that you created.
For the data visualization select any of the chart, table etc as your wish.
Click add
Click save.

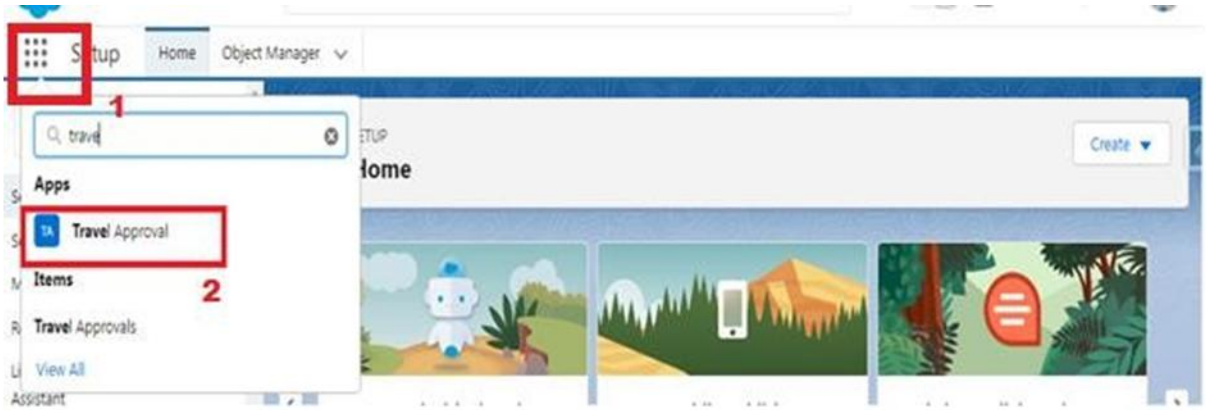


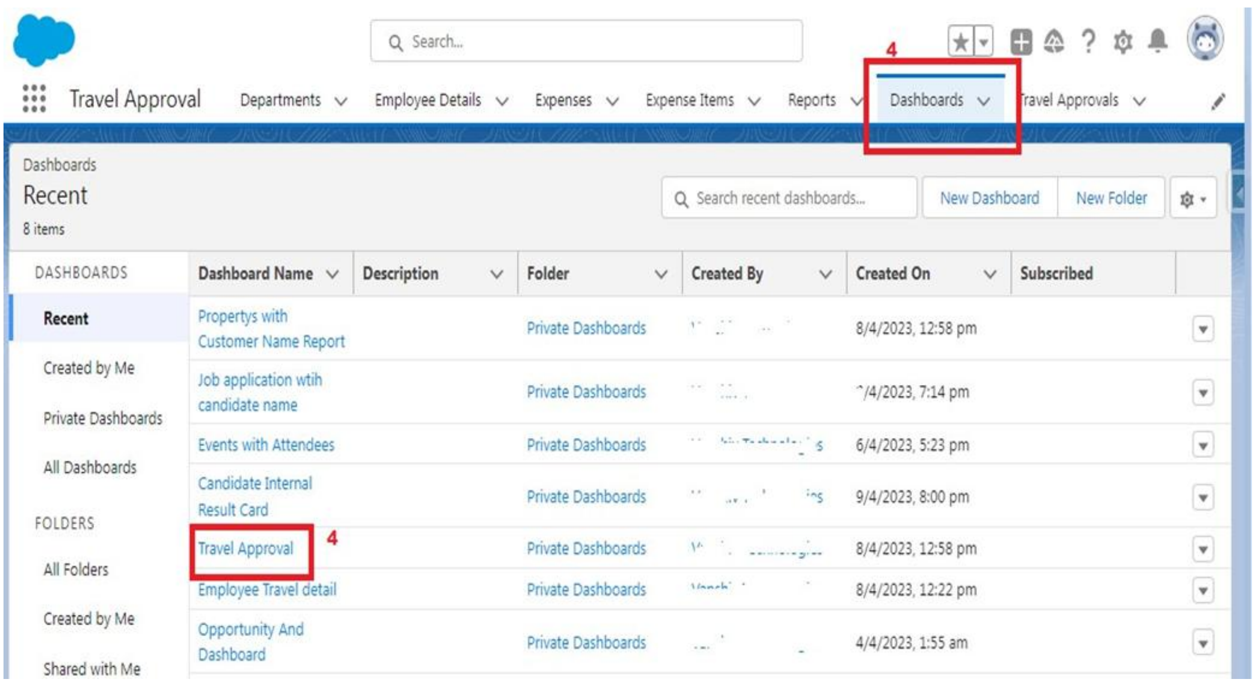




View Dashboard

1.Click on App Launcher on left side of screen.
2.Search Travel Approval App & click on it.
3.Click on Dashboard Tab.
4.Click on Travel Approval and see graph view of records



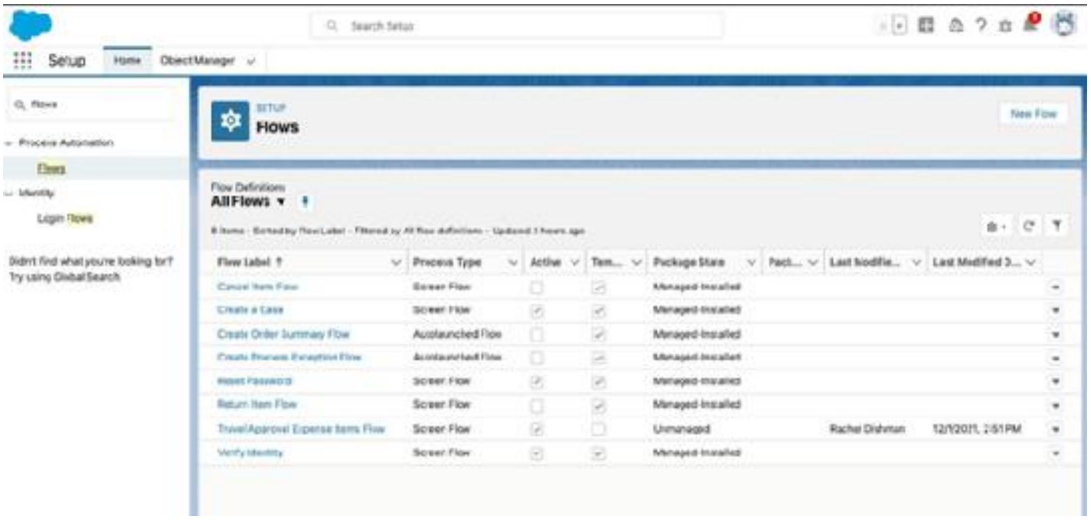


Flows

Create A Flow

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

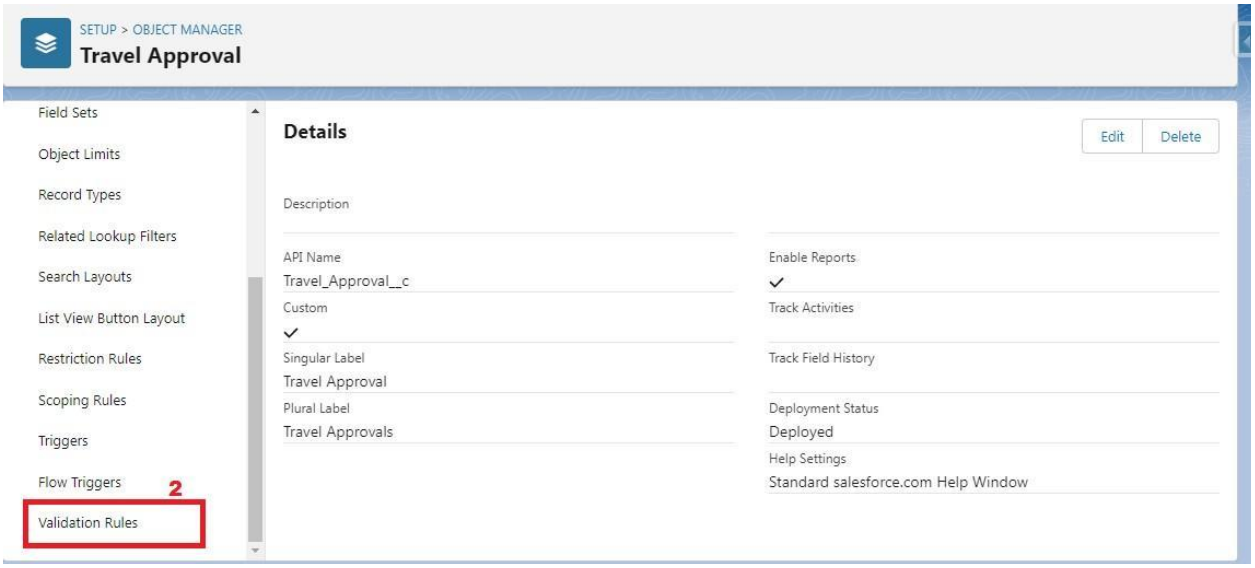
1. From Setup, click the Home tab.
2. Select Process Automation | Flows (or use the Quick Find and search for flows)

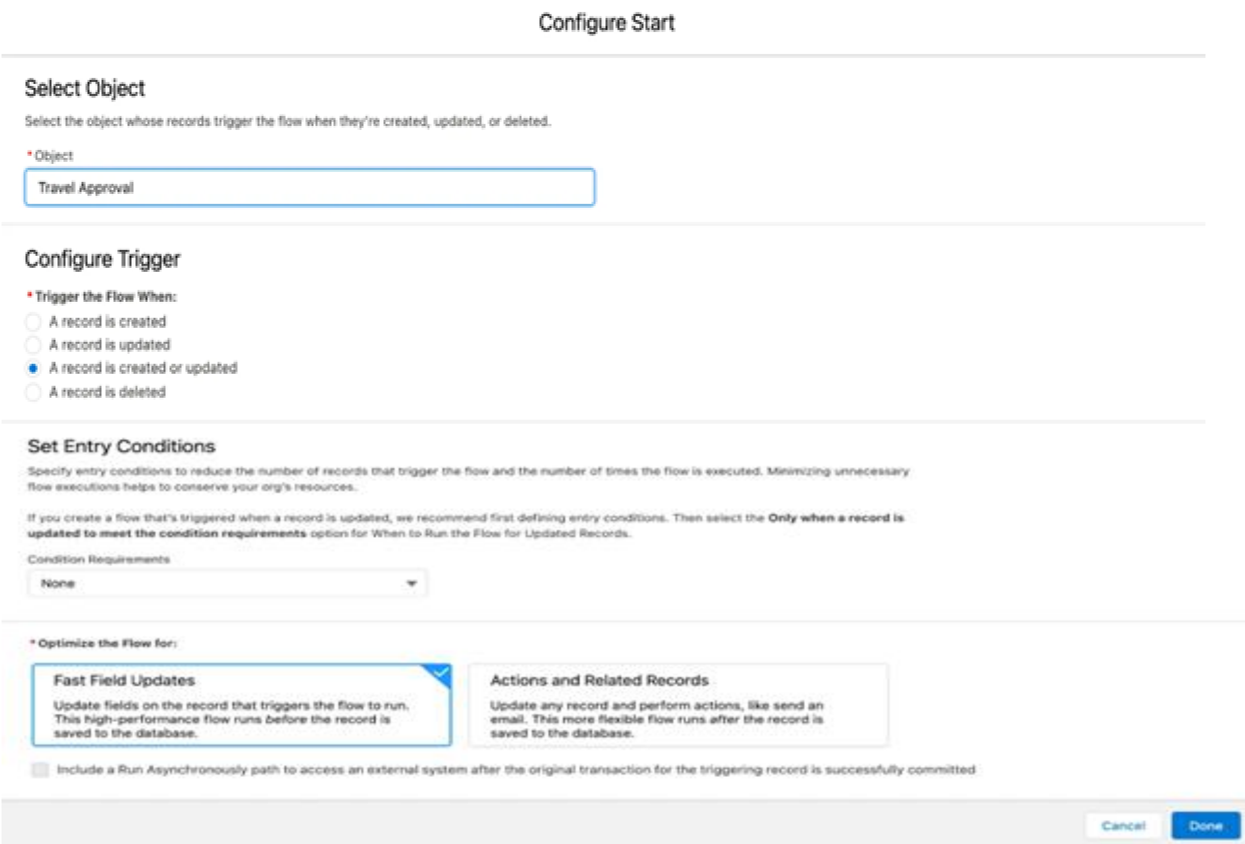


3. Click New Flow.
4. Select Record-Triggered Flow then click Create.
5. Enter these values:

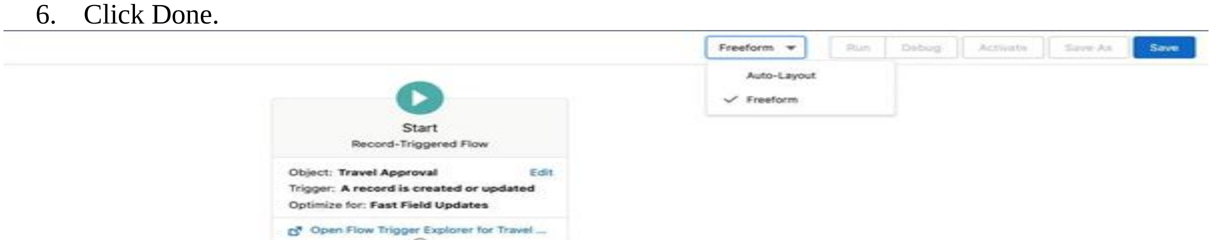
Parameter	Value
Object	Travel Approval
Configure Trigger	Trigger the flow when: **A record is created or updated**
Condition Requirements	None
Optimize the Flow For:	Fast Field Updates

The Configure Start screen should look like this:





6. Click Done.



7. In the Layout dropdown, select Freeform.

Add a Decision Element

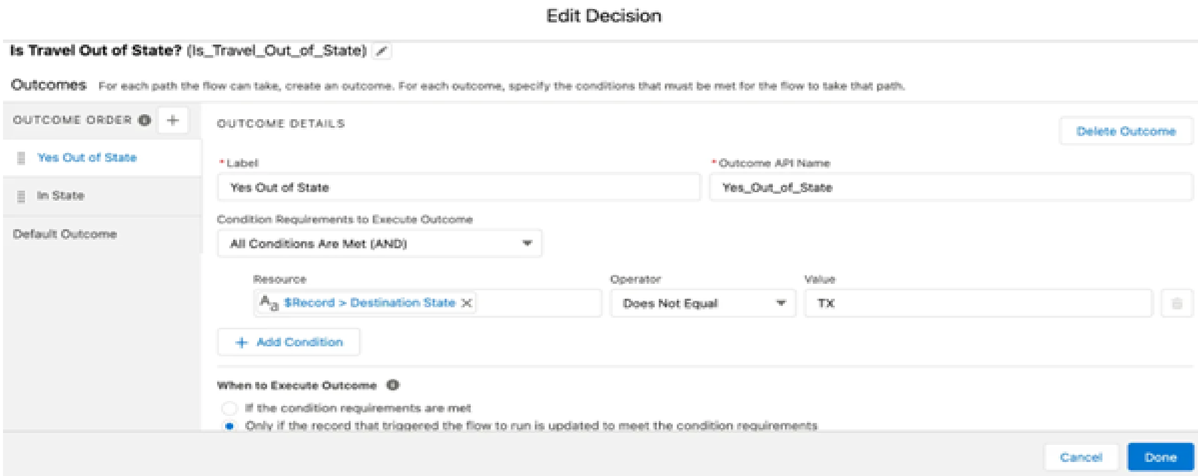
1. From the left-hand toolbox column, drag a Decision element onto the flow builder screen.
2. Set the following parameters:

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**

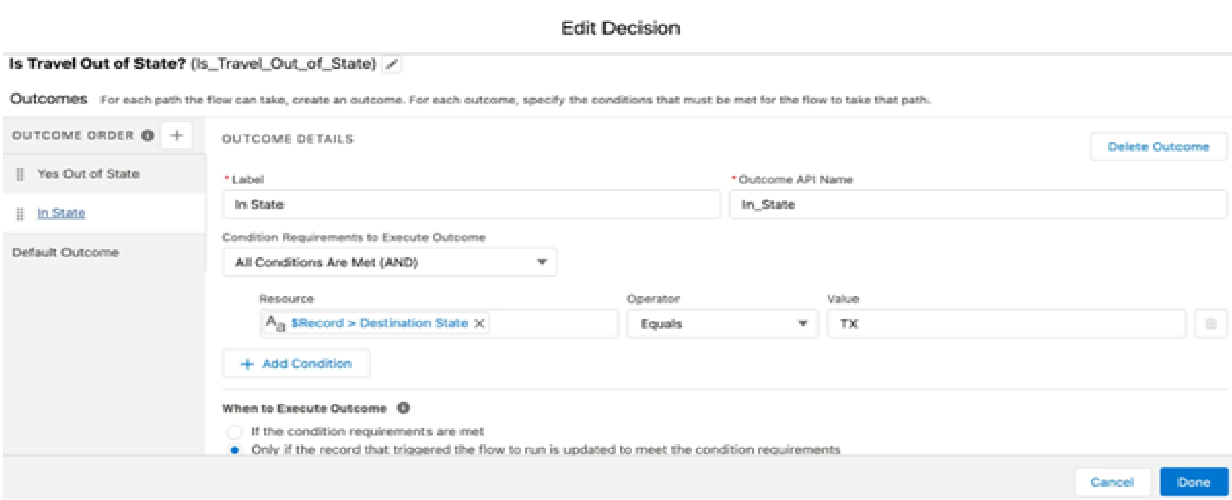
Your Edit Decision Screen should look like this:



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.

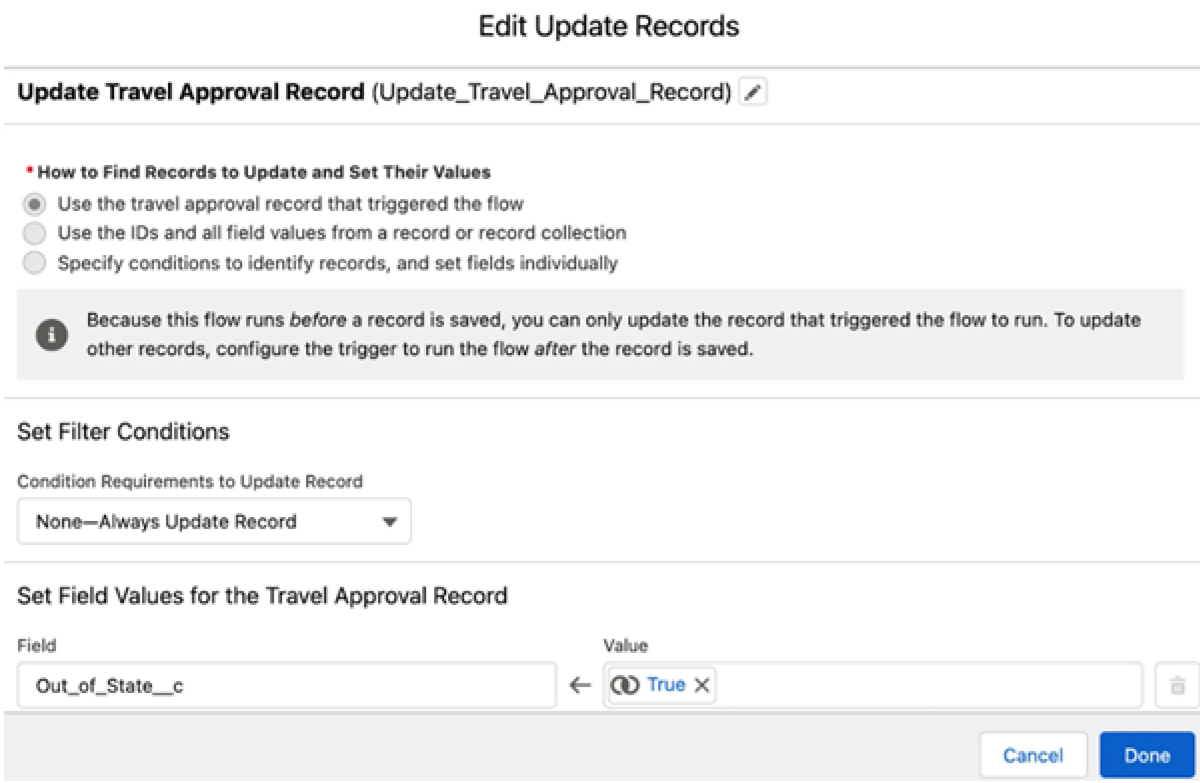


8. Drag the white circle from the Start Flow element to the Decision element you just created to link the direction of the arrow.

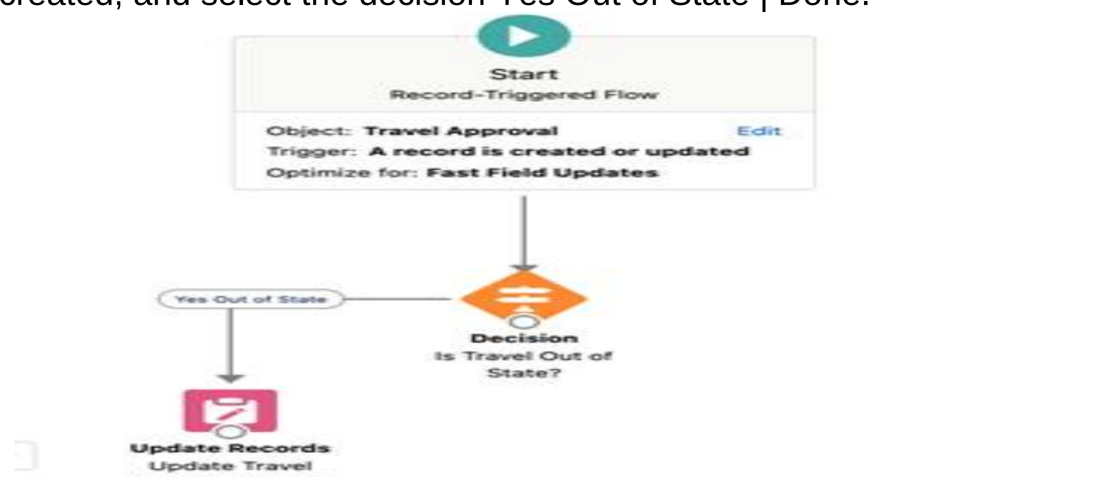
Create an Action for the Flow Using Update Records Elements
1. From the left-hand column, the flow toolbox, drag an Update Records element onto the flow screen.
2. Set the parameters for the element:

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)

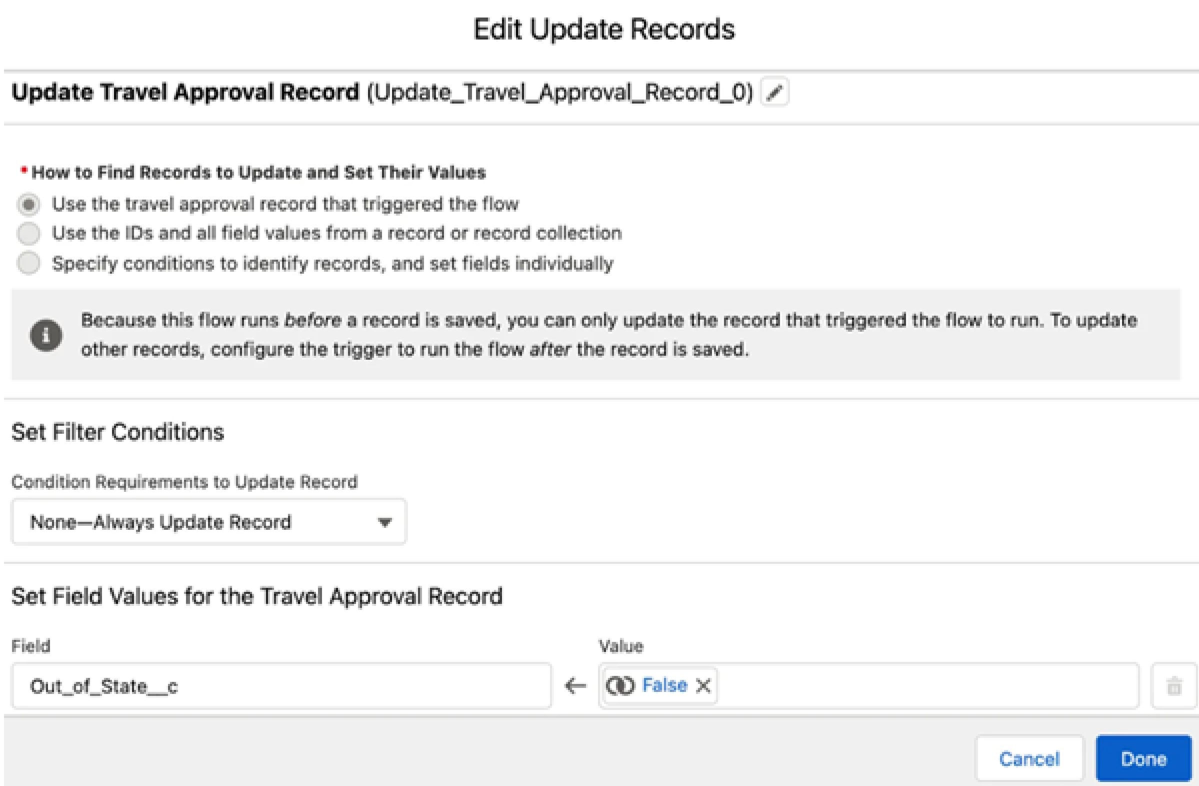
Your Update Record Screen should look like this:



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.

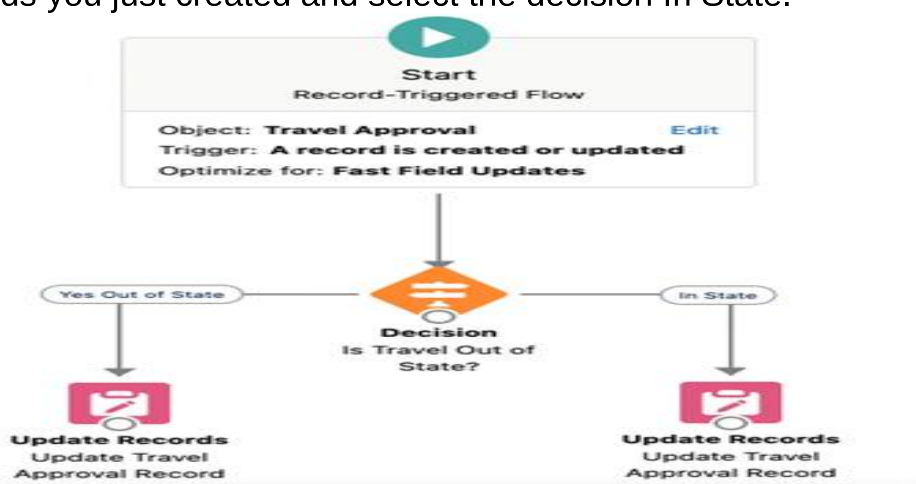


To save time, you can simply duplicate the Update Records element you just created and update the criteria.
5. Click the Update Records node and make sure it is highlighted in blue. In the top-left corner of the Flow Builder screen, find the and click the duplicate button Duplicate button. Double-click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



7. 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.



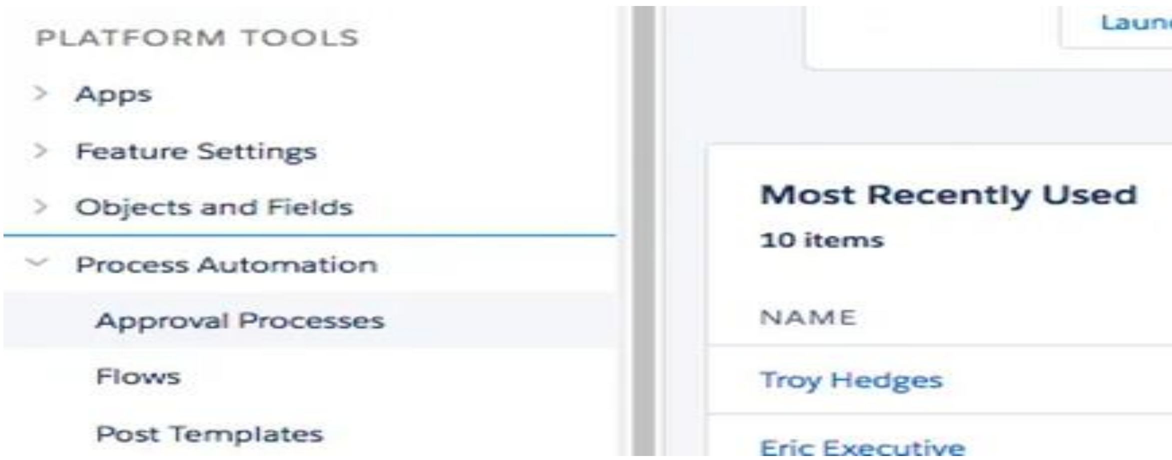
1. Click Save.
2. Flow Label: Out of State Travel Flag. Flow API Name will auto populate to Out_of_State_Travel_Flag. Leave Description blank and advanced settings as is.
3. Click Save.
4. Click Activate.

Approval Process

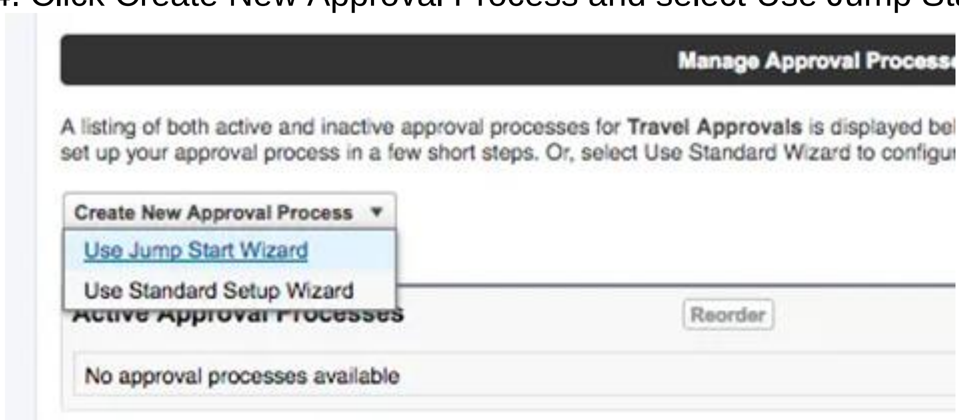
Create A Approval Process

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

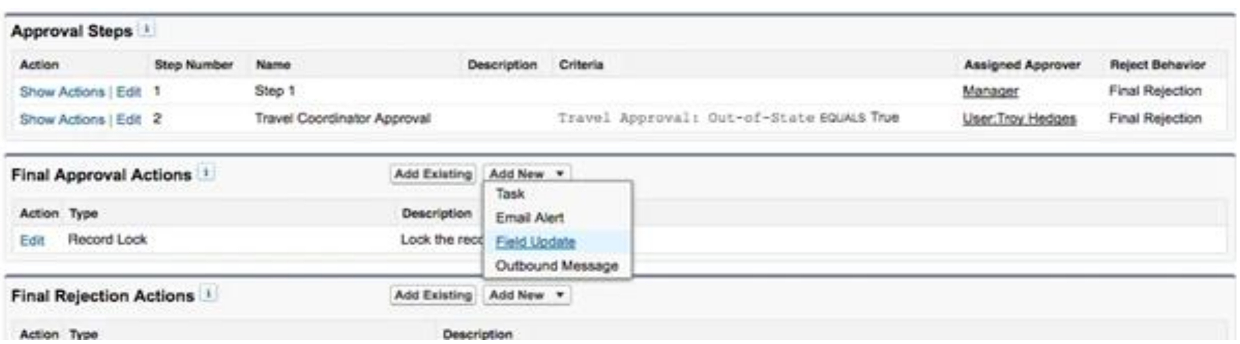
3. Click Next.
4. Ensure Enter this step if the following is selected and the criteria are met option is selected.
5. Enter the following formula criteria
Field: Travel Approval: Out-of-State
Operator: equals
Value: True
6. Click Next.
7. Select the Automatically assign to the approver(s) option.

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.



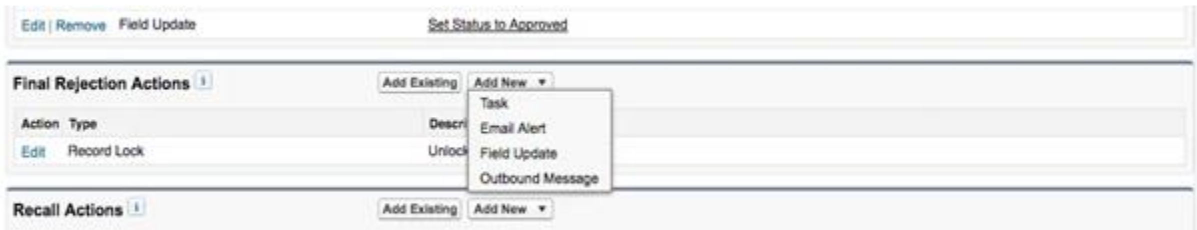
3. Enter the following values.

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.



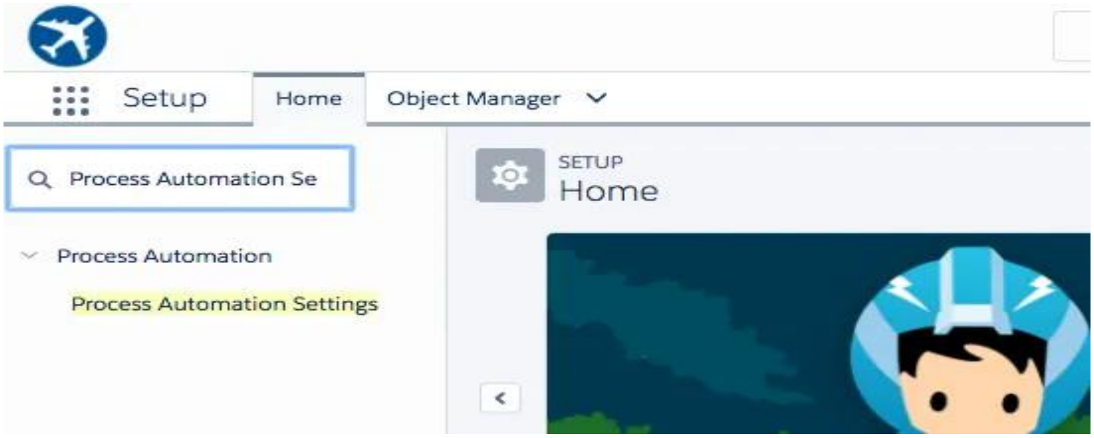
3. Enter the following values.

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.

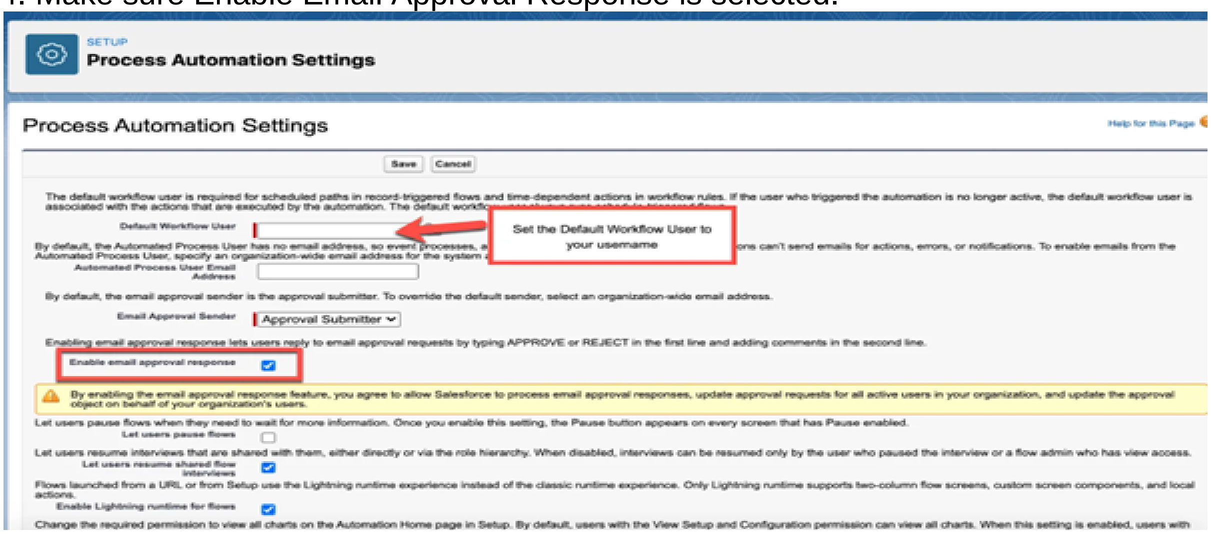
4. Click Save.
5. Click Activate.
6. Select OK in the popup window to confirm activation. Your approval process should now have the Active flag checked.

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.

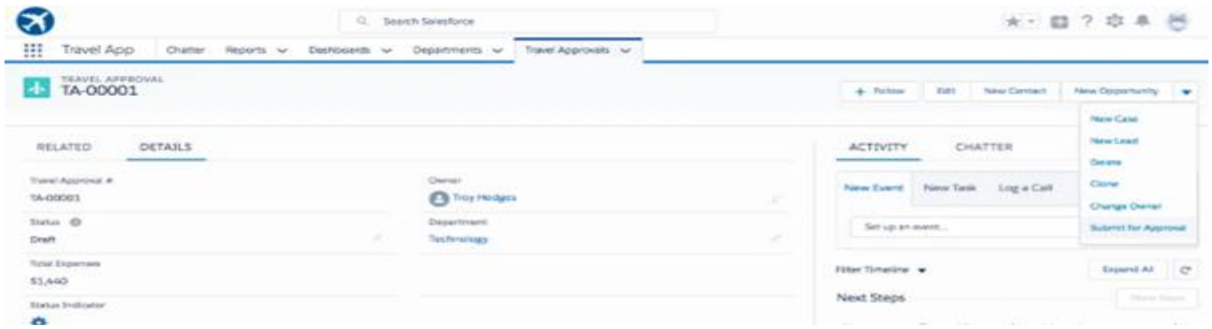


5. Set the Default Workflow User to your name.
6. Click Save.

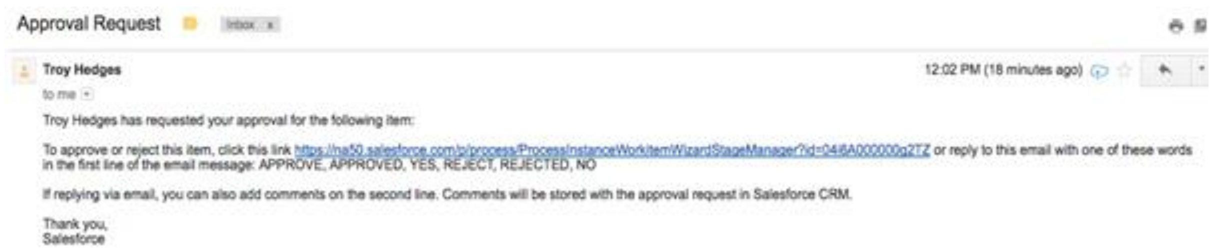
Test Your Approval Process

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

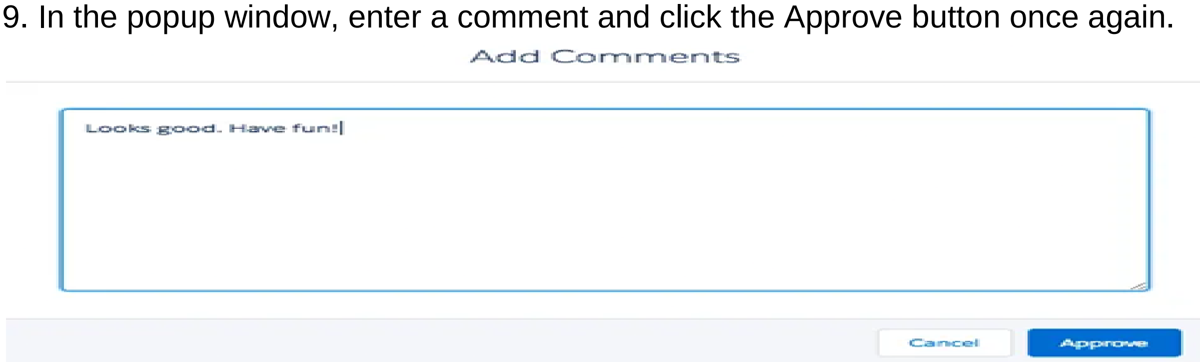
1. Using the App Launcher, navigate to the Travel App and click the Travel Approvals tab..
2. Select a record from the list. Make sure this is a travel approval record that has at least one expense item and a total expense amount greater than $0.
3. Click the down arrow next to the New Opportunity button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



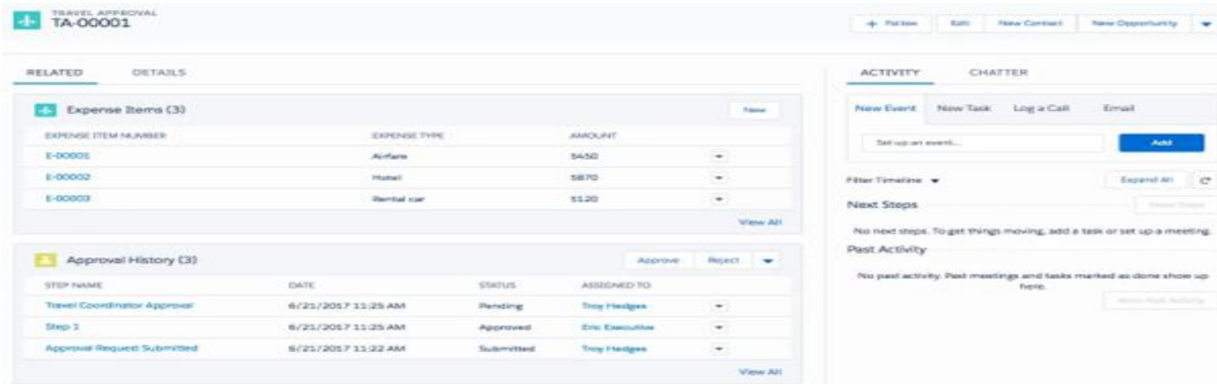
4. Enter a comment and click Submit.
5. You should receive an email alert like the following that lets Eric Executive know that he has a travel approval to process. Notice that it provides a link to directly access the Travel Approval record so that Eric could review it. Also, the email includes the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



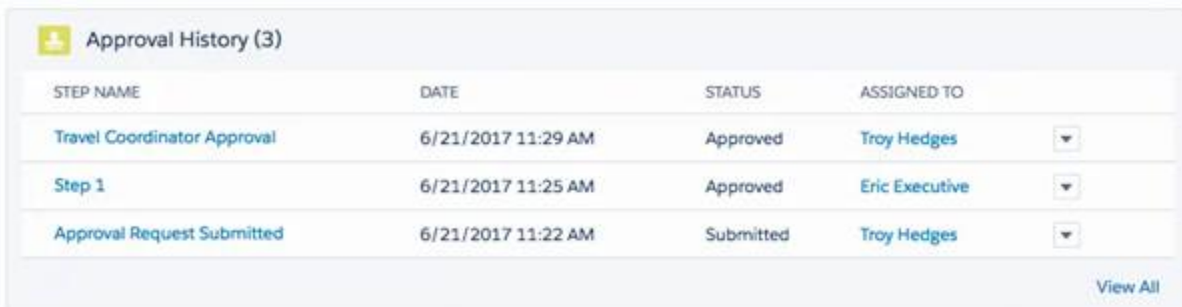
6. On your Travel Approval record, click the Related tab and you can see the new section titled Approval History that has details of your approval submission. Its status is Pending and it's assigned to Eric Executive.
7. At this point you could log out of Salesforce and log back in as Eric Executive.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



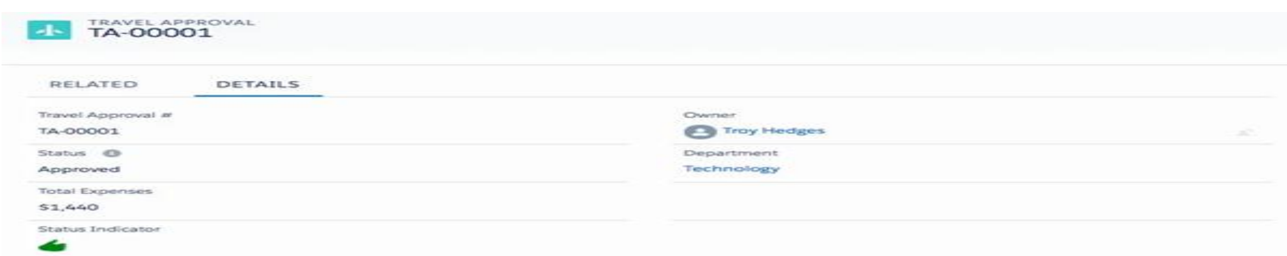
10. Since this was for out-of-town travel, the approval was sent to the Travel Coordinator (remember, this is the logic we defined for the Approval Process). The approval is actually pending on yourself since you are acting as the travel coordinator (obviously, this wouldn't be the case in a real-world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



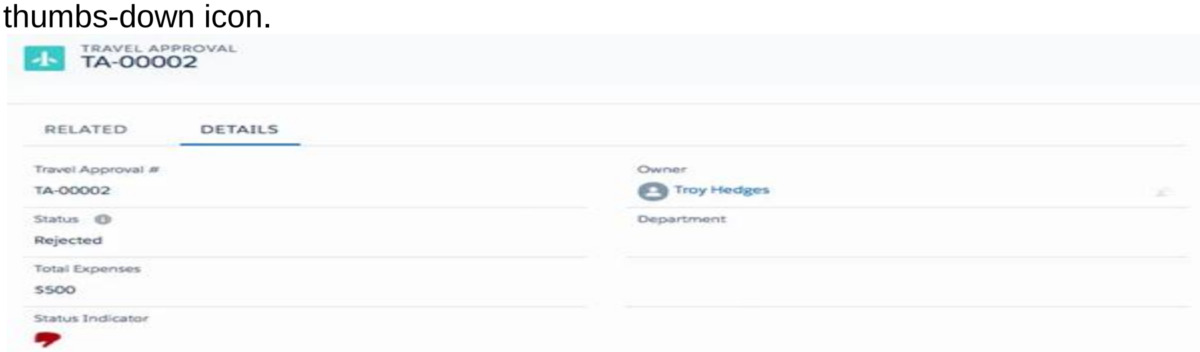
11. Click Approve in the Approval History section to finish the approval.
12. Enter a comment in the popup window and click Approve.
13. The Approval History section should now look like the following:



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.

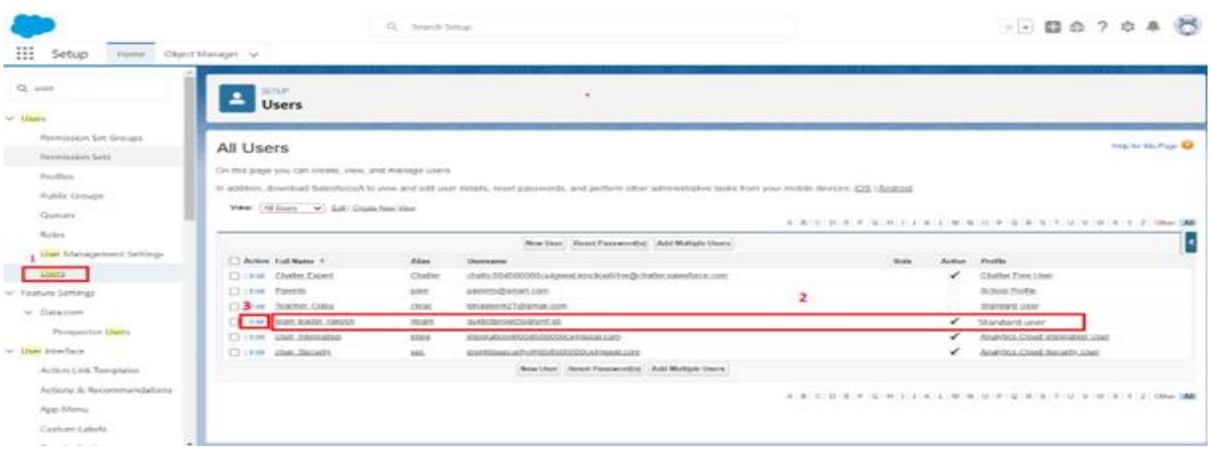


Congratulations! You have added automation to your application using point and click tools such as:

- 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.