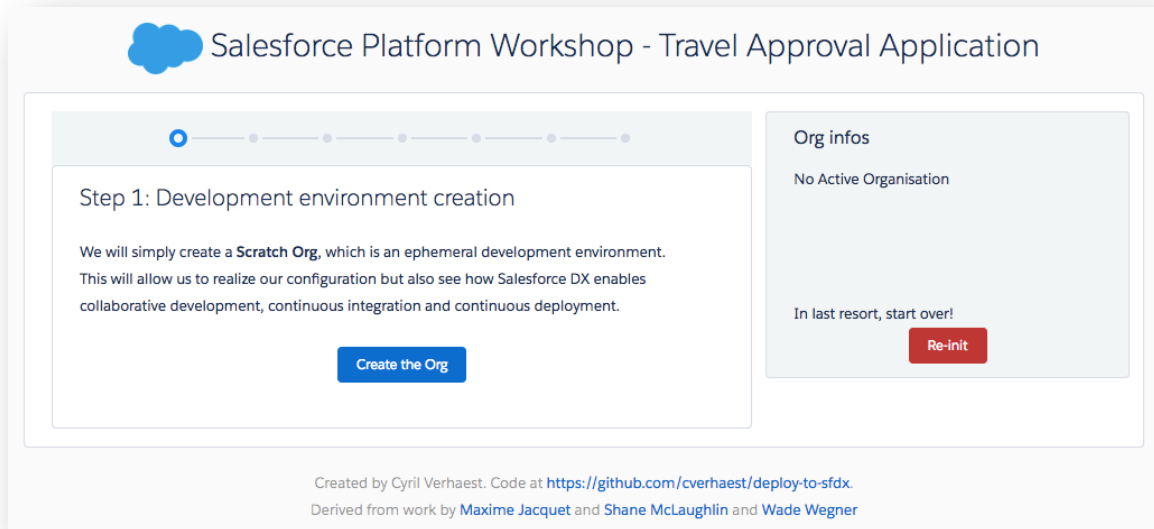


# Travel Approval App – Configuration Guide

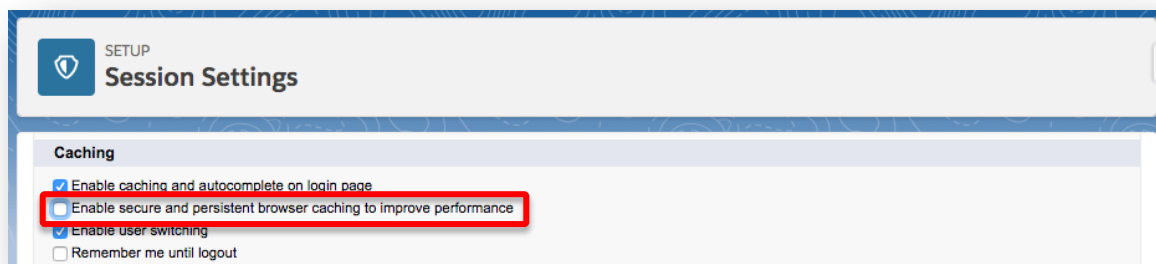
« Step by Step » deployment tool (« workshop automator »):

<https://sfdxappwizard-en.herokuapp.com/>




## Step 1 – DEVELOPMENT ENVIRONMENT CREATION (*Scratch Org*) and prerequisites

- Remark: use the « Step by Step » deployment tool to create your Salesforce environment.
- Modify the cache management parameter: Setup / ... / Session Settings
  - **Enable secure and persistent browser caching to improve performance**: ☐ (*Unchecked*)



- Add languages for translations: Setup / ... / Translation Language Settings
  - Add « **English** » & « **French** »

 **SETUP**  
**Translation Language Settings**

### Translation Workbench

[Help for this Page](#) ?

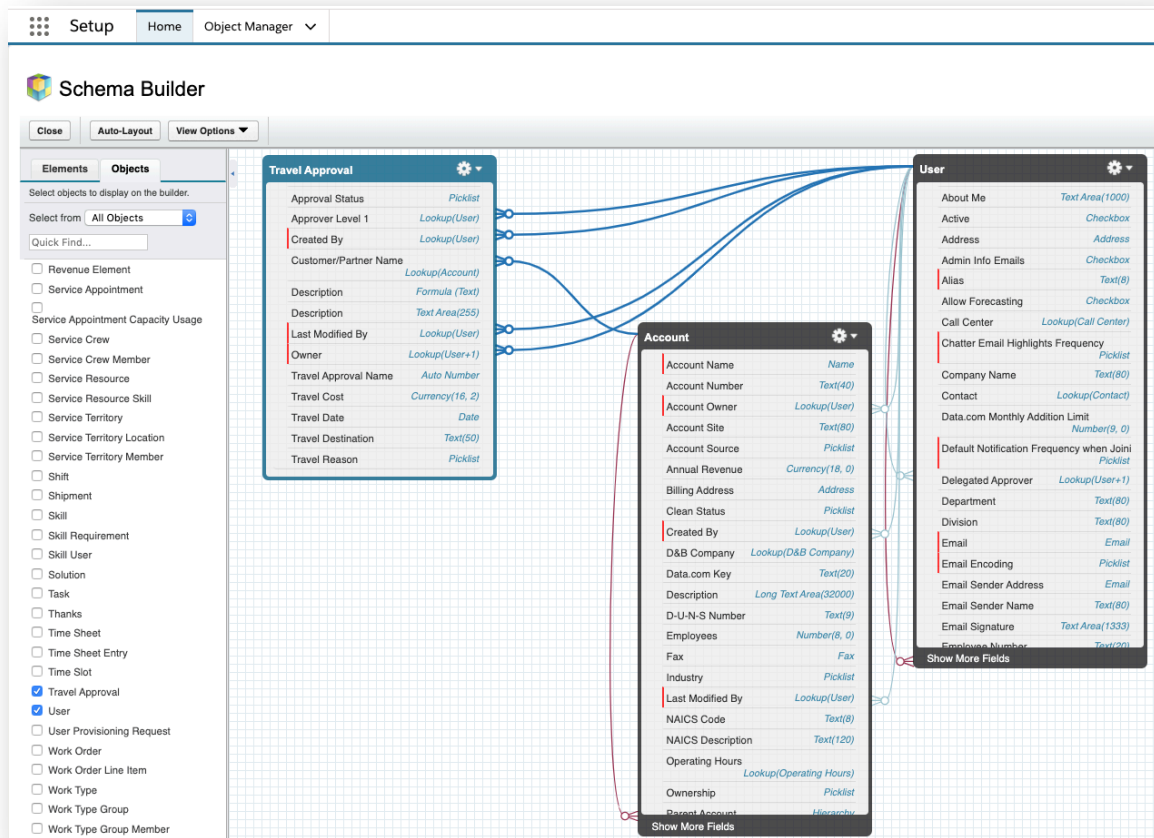
Click Add to select the languages your organization supports and the users who are responsible for translating that language.

**Supported Languages**

Add

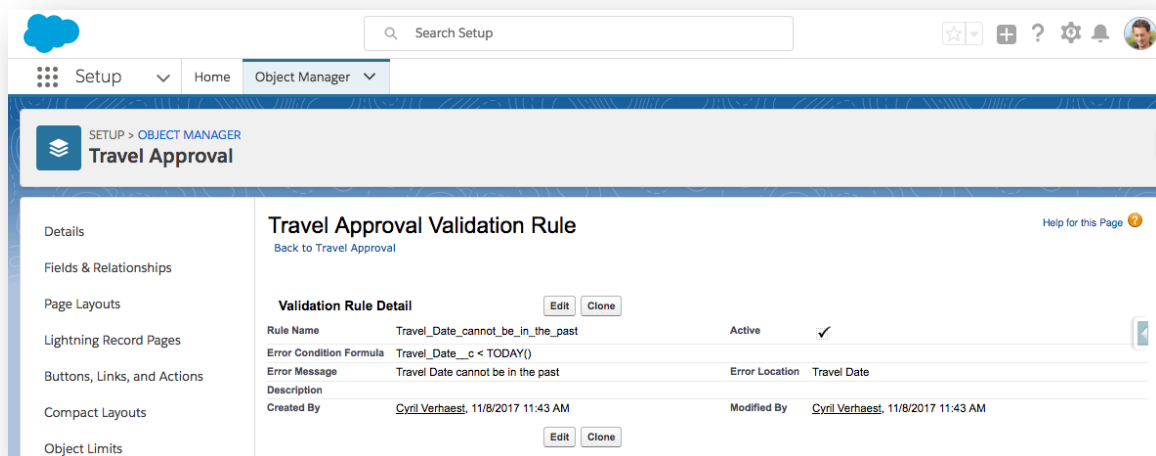
Action	Language	Active	Translator(s)
<a href="#">Edit</a>	English	✓	User User
<a href="#">Edit</a>	French	✓	User User

## Step 2 – DATA MODEL CREATION



- Create the « Data Model »: Setup / ... / Object Manager
  - Create / Custom Object
    - Object Name: **Travel Approval - Demande de voyage**
    - Name: Auto Number - TA-{00000}
    - Allow Reports, Activities, Track Field History, Allow In Chatter Groups
    - Allow Search
    - Add Notes and Attachments related list to default page layout
    - Launch New Custom Tab Wizard after saving this custom object
  - Tab
    - Globe Icon
    - Default On for All Profiles
  - Create Custom Fields
    - **Approval Status - Statut**
      - Picklist
      - **New, Pending, Approved, Rejected - Nouveau, En attente, Approuvé, Rejeté**
      - Use first value as default value
    - **Travel Date - Date du voyage**
      - Date
    - **Description - Description**
      - Text Area
    - **Travel Destination - Destination**
      - Text

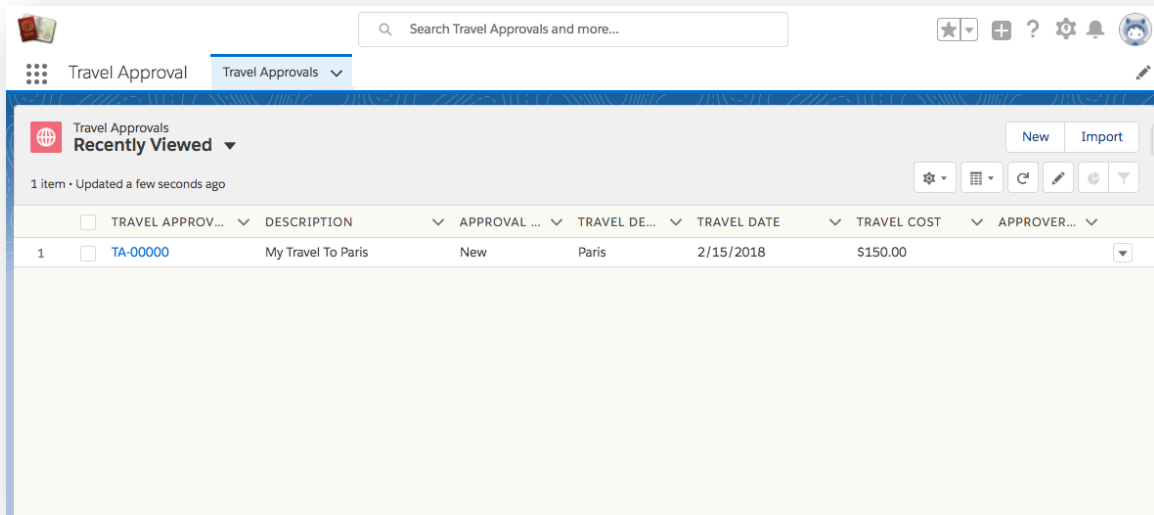
- **Travel Reason - Raison du voyage**
    - Picklist
    - **Internal Meeting, Customer Meeting, Partner Meeting - Meeting interne, Meeting client, Meeting partenaire**
  - **Travel Cost - Coût du voyage**
    - Currency (16.2)
  - **Approver Level 1 - Approbateur - Niveau 1**
    - Lookup Relationship / User
  - **Customer/Partner Name - Client/Partenaire**
    - Lookup Relationship / Account
- Create a « Validation rule – Travel Date cannot be in the past »: Setup / ... / Object Manager / Travel Approval / Validation Rules / New
    - Validation Rule Name: **Travel\_Date\_cannot\_be\_in\_the\_past**



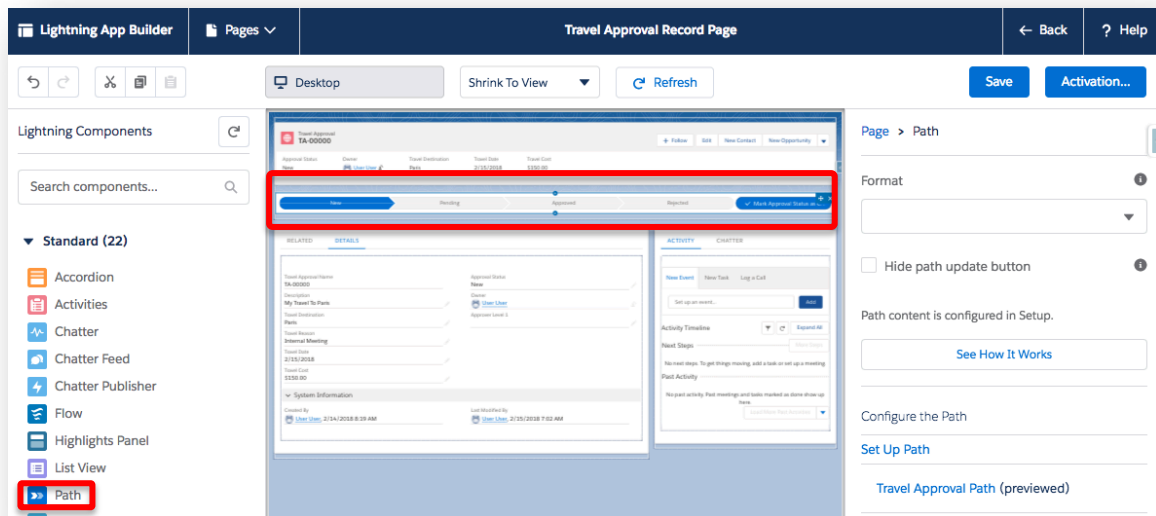
- Add « Translations »: Setup / ... / Translate
- Remark n°1: at this stage you can already create a « Travel Approval Request », collaborate around it, ...
- Remark n°2: to help you, you can use the « Step by Step » deployment tool.

### Step 3 – CREATE A DEDICATED APPLICATION

- Create the App: Setup / ... / App Manager
  - New Lightning App
    - Name: **Travel Approval - Demande de voyage**
    - Next – App Options
      - Navigation Style: Standard Navigation
      - Supported Form Factors: Desktop and phone
    - Next – Navigation Items
      - Selected Items: Travel Approval
    - Next – User Profiles
      - Assigned To User Profiles: System Administrator



- Add the « Path Assistant » on the « Travel Approval » record page: Edit Page
  - Drag & Drop the « Path Component » to the Page



- (optional) Add a « Customer or Partner Information » section on the « Travel Approval » record page
  - Create a « Quick Action »: Setup / ... / Object Manager / Account / Buttons, Links, and Actions
    - New Action
      - Label: **Travel Approval - Customer or Partner Information**
      - Action Type: Update a Record
    - Select the fields/information to display in the « Action Layout »

**Action: Travel Approval - Customer or Partner**

Information

Save Quick Save Preview As... Cancel Undo Redo

Quick Find Field Name

Blank Space	Account Source	Created By	Employees	NAICS Code	Parent Account	SIC Co
Account Name	Annual Revenue	D&B Company	Fax	NAICS Description	Phone	SIC De
Account Number	Billing Address	Description	Industry	Operating Hours	Rating	Ticker
Account Site	Clean Status	D-U-N-S Number	Last Modified By	Ownership	Shipping Address	Trades

**Account Name \***  
Sample Text

**Type**  
Sample Text

**Phone**  
1-415-555-1212

**Website**  
www.salesforce.com

**Industry**  
Sample Text

- Add the « Customer or Partner » information section on the « Travel Approval » record page: Edit Page
  - Drag & Drop the « Related Record Component » to the Page and configure it.

**Lightning App Builder** Pages

Desktop Shrink To View Refresh

Travel Approval Record Page

Components

Search components...

- Related List - Single
- Related List - Quick Links
- Related List - Table
- Related Record**
- Rich Text
- Topics
- Trending Topics
- Visualforce

Custom (5)

- File Upload Lightning Web Comp...
- Generic Rules Lightning Web Co...
- Generic Time Line Component
- TravelApprovalFileUpload\_LCMP
- TravelApprovalPath\_LCMP

Custom - Manager (0)

No components available.

Get more on the AppExchange

**Travel Approval TA-00000**

Description: My Travel To Paris

Approval Status: Pending

Owner: User User

Travel Destination: Paris

Travel Reason: Customer Meeting

Travel Date: 5/29/2020

Travel Cost: \$120.00

**Details** **Related**

Travel Approval Name: TA-00000

Description: My Travel To Paris

Travel Destination: Paris

Travel Reason: Customer Meeting

Travel Date: 5/29/2020

Travel Cost: \$120.00

Approval Status: Pending

Owner: User User

Approver Level 1: Security User

**Customer or Partner Information**

Account Name: Salesforce.com, Inc.

Type: Technology

Phone: +1.415.901.7000

Website: www.salesforce.com

**Activity** **Chatter**

New Event New Task Log a Call

Set up an event...

Auto

Filters: All time - All activities - All types

**Page > Related Record**

Let users view a related record, edit it inline, change the linked record, and create a new related record.

Header Label: Customer or Partner Information

\*Lookup Field: Customer/Partner Name

\*Update Action: Travel Approval - Customer or Partner Info

Create Action: New Account

Choose an object that has a quick action to update the record. Some lookup fields have default actions. If a default action isn't available, create one. You can also edit the layout for existing actions.

**Set Component Visibility**

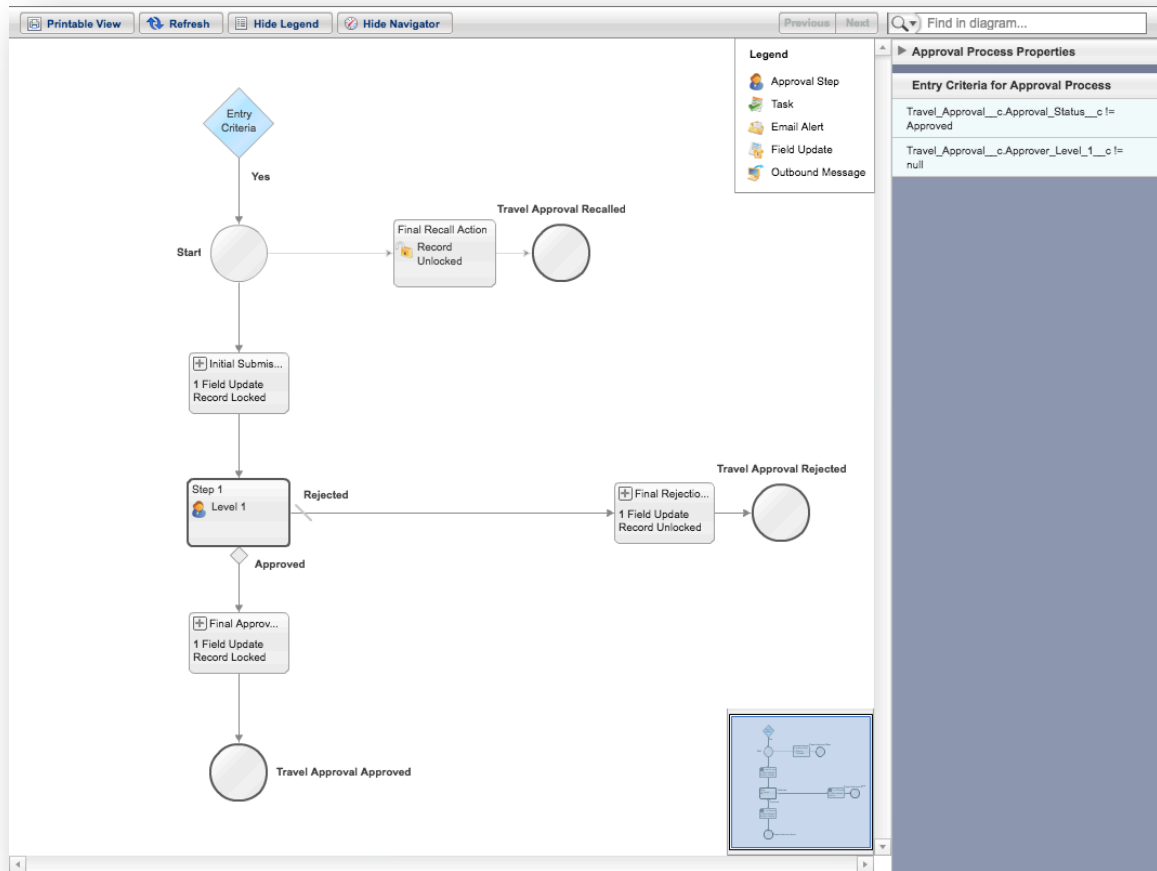
Filters

- 1 Record > Travel Reason Equal Customer Meeting
- 2 Record > Travel Reason Equal Partner Meeting

- Remark: to help you, you can use the « Step by Step » deployment tool.

## Step 4 – PROCESS AUTOMATION - PROCESS BUILDER & APPROVAL PROCESS

- Approval Process (*To submit for approval a travel approval request*): Setup / ... / Approval Processes



Manage Approval Processes For: Travel Approval  
Create New Approval Process: Use Standard Setup Wizard

- Step 1 - Process Name: **Travel Approval - Approval Process**
- Step 2 - Entry Criteria: “Approval Status” NOT EQUALS TO “Approved” AND “Approver Level 1” NOT EQUALS TO null
- Step 3 - Administrators **OR** the currently assigned approver can edit records during the approval process.
- Step 5
  - Selected Fields: Add “Description” (*first one*), “Travel Date”, “Travel Destination”, “Travel Cost”, “Travel Reason”
  - Display approval history information in addition to the fields selected above
  - Allow approvers to access the approval page only from within the Salesforce application. (Recommended)
- Step 6 - Specify Initial Submitters: Travel Approval Owner

*Yes, I'd like to create an approval step now.*

Approval Step 1:

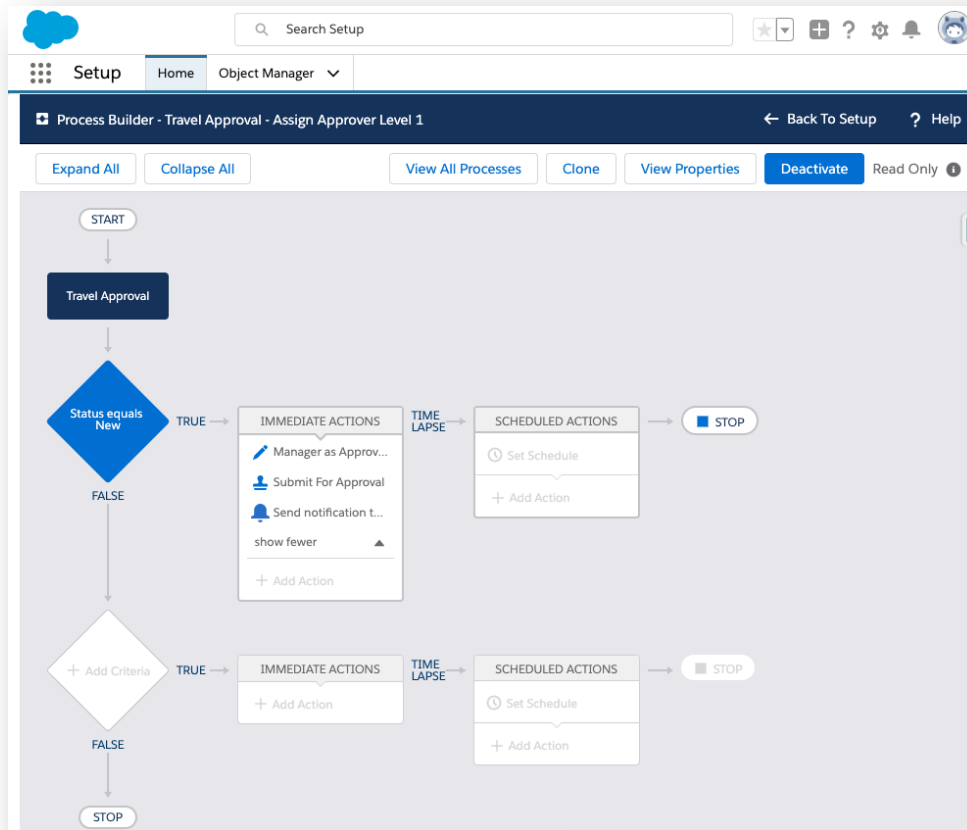
- Step 1 - Name: **Level 1**
- Step 2 - All records should enter this step
- Step 3 - Automatically assign to approver(s): Related User / Approver  
Level 1

*No, I'll do this later. Take me to the approval process detail page to review what I've just created.*

- Add Initial Submission Actions
  - Field Update
  - Name: **Status equals "Pending"**
- Add Final Approval Actions
  - Field Update
  - Name: **Status equals "Approved"**
- Add Final Rejection Actions
  - Field Update
  - Name: **Status equals "Rejected"**
- **Activate**



- Process Builder (to fill the right approver and while creating a new travel approval request to submit it for): Setup / ... / Process Builder / New

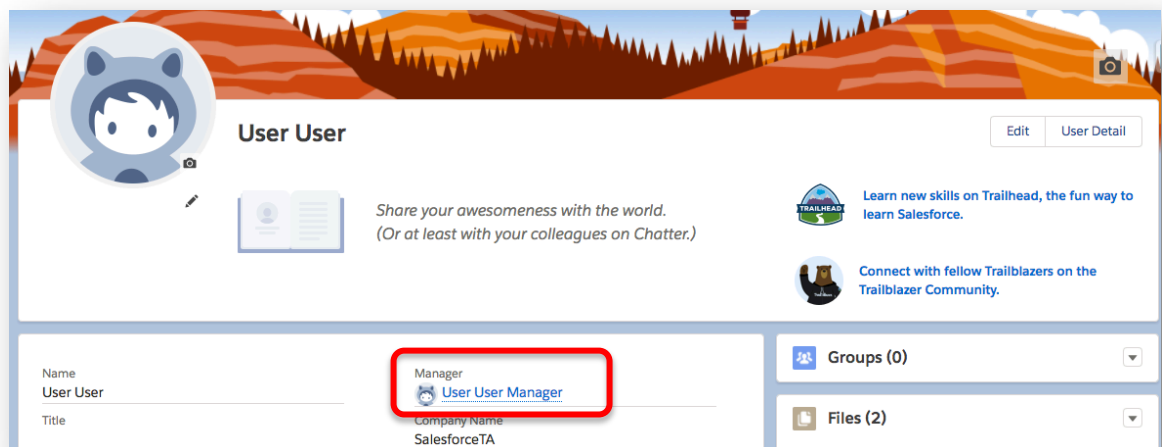


- Process Name: **Travel Approval - Assign Approver Level 1**
- The process starts when: A record changes
- Object: Travel Approval
- Start the process: only when a record is created
- Add Criteria
  - Approval Status equals New
- Immediate Action n°1
  - Action type: Update Records
  - Action name: **Manager as Approver Level 1**
  - Record Type: Select the Travel\_Approval\_\_c record that started your process
  - Criteria for Updating Records : No criteria—just update the records!
  - Approval Level 1 equals “Field Reference: [Travel\_Approval\_\_c].Owner:User.ManagerId”
- Immediate Action n°2
  - Action type: Submit for Approval
  - Action name: **Submit For Approval**
  - Approval Process - Specific Approval Process - “Travel Approval - Approval Process - Travel\_Approval\_Approval\_Process”
- (optional) Immediate Action n°3 – Custom notification
- **Activate**

- Remark: to help you, you can use the « Step by Step » deployment tool.
- Create a test “Manager” user: Setup / ... / Users / New
  - Firstname: User
  - Lastname: Manager
  - Email: « *Votre adresse email* »
  - Username: **usermanagerXXXXX@example.com**
  - User License: Salesforce
  - Profile: System Administrator
  - ...
  - & assign Permission Sets to him

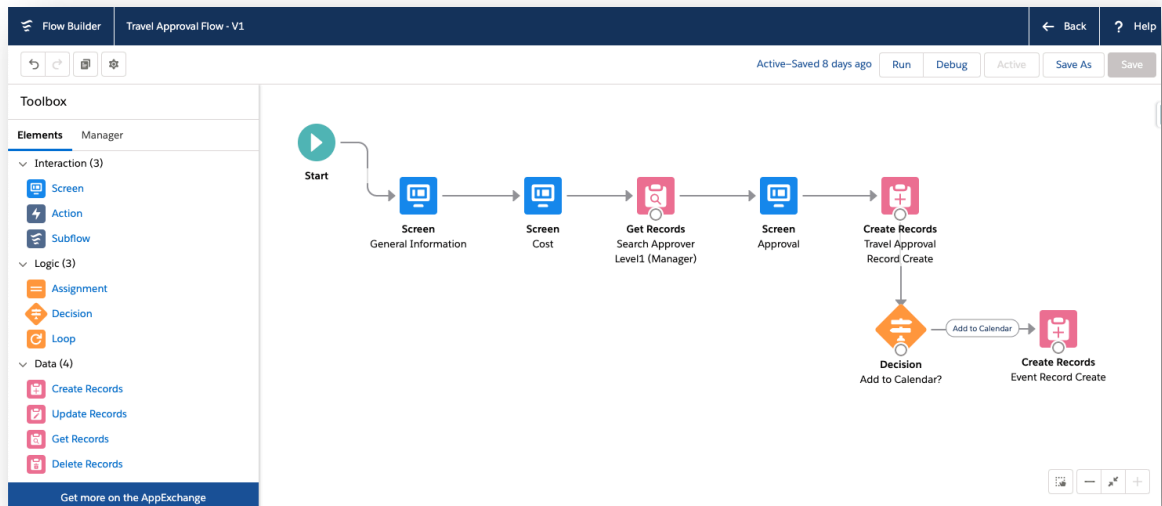


- Assign the « Manager » user as the manager of the current user:



## Step 5 – VISUAL PROCESS AUTOMATION – FLOW BUILDER

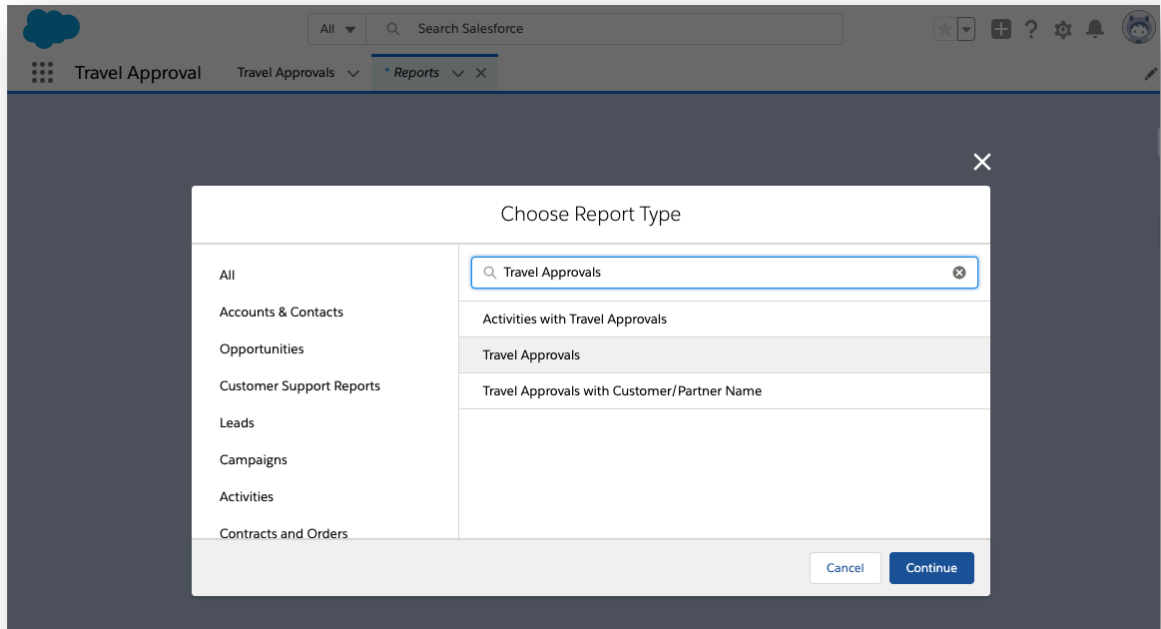
- Flow Builder: Setup / ... / Flows



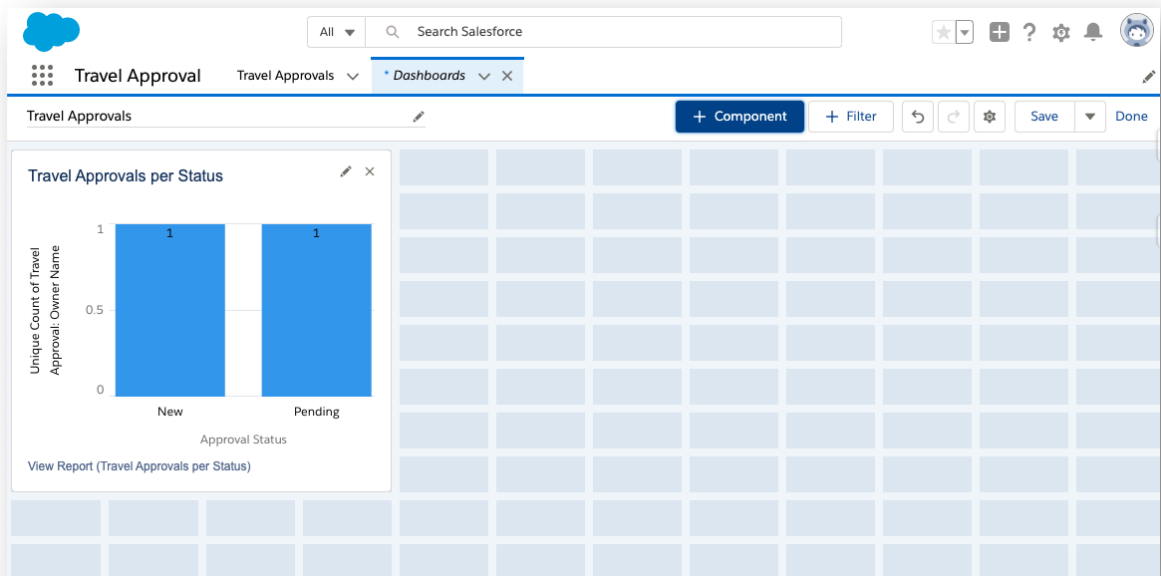
- Remark: use the « Step by Step » deployment tool.

## Step 6 – REPORTS & DASHBOARD

- App Launcher - Reports: New Report
  - Report Type: **Travel Approvals**



- App Launcher – Dashboards: New Dashboard
  - Dashboard Name: **Travel Approvals**



- Remark: to help you, you can use the « Step by Step » deployment tool.

## Step 7 – DEVELOPMENT ON THE PLATFORM

The screenshot displays the Trailhead platform interface for a Travel Approval record (TA-00002). The interface is divided into several sections:

- Details:** Contains fields for Travel Approval Name (TA-00002), Description (test), Travel Destination (test), Travel Reason (Customer Meeting), Travel Date (7/24/2020), and Travel Cost (\$156.00).
- System Information:** Contains fields for Approval Status (Approved), Owner (User User), and Approver Level 1 (Security User).
- Customer or Partner Information:** Contains fields for Account Name (test account), Type, Phone (12345), Website (www.site.com), and Industry.
- Expense Receipt:** A section for uploading the expense receipt, featuring an "Upload Files" button and a "Or drop files" option.
- Rules (2):** A section displaying two rules:
  - RULE:** TARule... **DESCRIPTION:** As per company policy, all travel requires approval.
  - RULE:** TARule... **DESCRIPTION:** Book with minimum 7 days in advance.

The "Expense Receipt" and "Rules (2)" sections are highlighted with red boxes.

- Remark: to help you, you can use the « Step by Step » deployment tool.