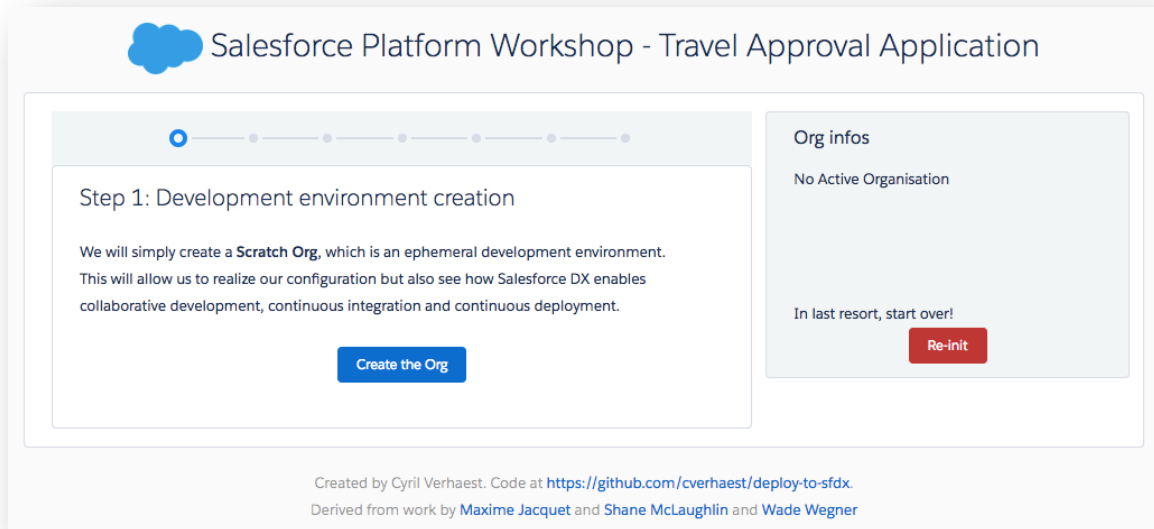


Travel Approval App – Configuration Guide

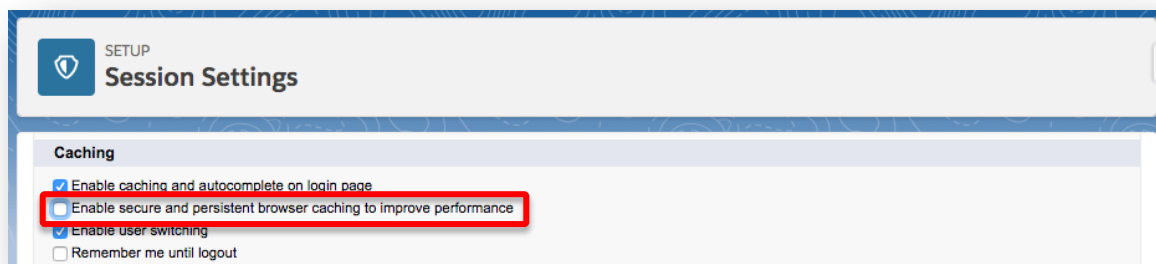
« Step by Step » deployment tool (« workshop automator »):

<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** »

The screenshot shows the 'Translation Language Settings' page. At the top, there's a 'SETUP' header with a gear icon. Below it, the title 'Translation Language Settings' is displayed. The main section is titled 'Translation Workbench' with a 'Help for this Page' link. A sub-header reads: 'Click Add to select the languages your organization supports and the users who are responsible for translating that language.' Below this is a table titled 'Supported Languages' with an 'Add' button. The table has four columns: 'Action', 'Language', 'Active', and 'Translator(s)'. There are two rows: one for 'English' and one for 'French'. Both rows have 'Edit' links in the 'Action' column, 'English' and 'French' in the 'Language' column, checkmarks in the 'Active' column, and 'User User' in the 'Translator(s)' column. A red rectangle highlights the 'English' and 'French' rows.

Action	Language	Active	Translator(s)
Edit	English	✓	User User
Edit	French	✓	User User

- Enable « Dynamic Forms »: Setup / ... / Record Page Settings
 - Flip the switch to « **On** » and click « **Save** »

The screenshot shows the 'Record Page Settings' page. At the top, there's a 'SETUP' header with a gear icon. Below it, the title 'Record Page Settings' is displayed. The main section is titled 'Dynamic Forms (Non-GA Preview, desktop only)' with a sub-header: 'Break up your record details into individual field and section components that you can put anywhere on the page.' To the right of this section is a toggle switch labeled 'On', which is currently turned on. Below this is a diagram showing a record page layout with various components. Further down, there's a text block: 'To participate in the Dynamic Forms Non-GA Preview, indicate that you have read all legal requirements and agree to participate by enabling it from this page. See additional details and terms in our [Release Notes](#).' Below this is a note: 'Dynamic Forms is available only for custom objects and isn't supported on record pages that use pinned-region or custom page templates. [Tell Me More](#)'. The bottom section is titled 'Default Lightning Experience Record Page View' with a sub-header: 'Assign the org default Lightning Experience record page view.' Below this are three thumbnails of record page views. The rightmost thumbnail is selected and has a blue checkmark. At the bottom of the page, there are 'Cancel' and 'Save' buttons. A red rectangle highlights the 'Save' button.

Dynamic Forms (Non-GA Preview, desktop only)

Break up your record details into individual field and section components that you can put anywhere on the page.

To participate in the Dynamic Forms Non-GA Preview, indicate that you have read all legal requirements and agree to participate by enabling it from this page. See additional details and terms in our [Release Notes](#).

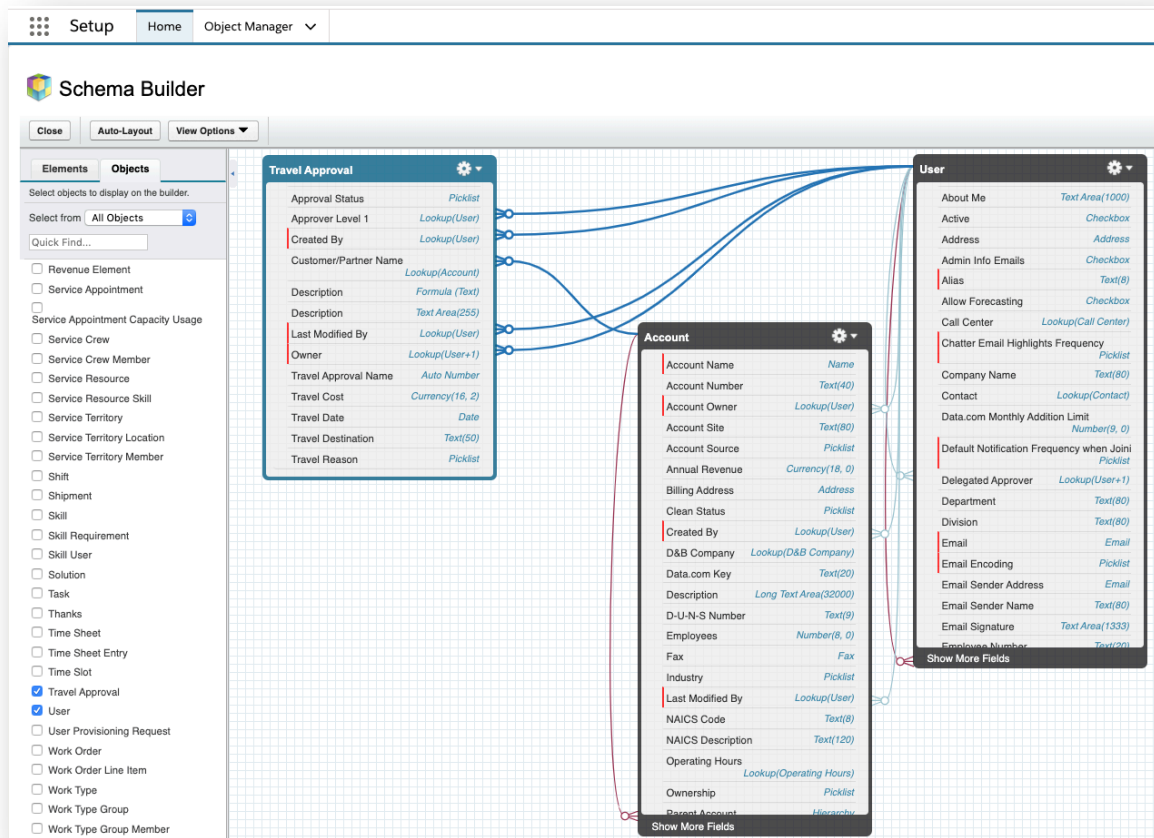
Dynamic Forms is available only for custom objects and isn't supported on record pages that use pinned-region or custom page templates. [Tell Me More](#)

Default Lightning Experience Record Page View

Assign the org default Lightning Experience record page view.

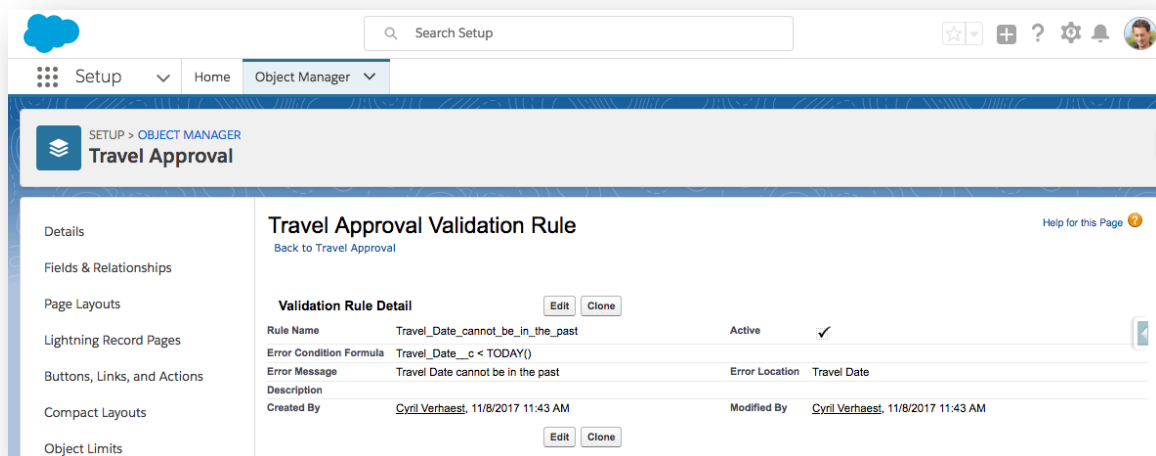
Cancel Save

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

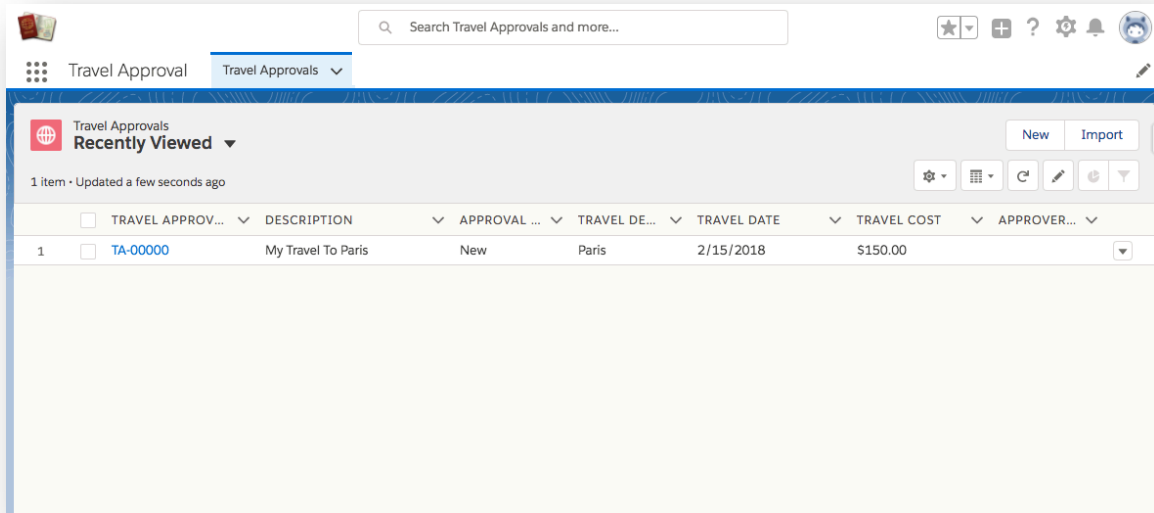
- **Travel Reason - Raison du voyage**
 - Picklist
 - **Internal Meeting, Customer Meeting, Partner Meeting - Meeting interne, Meeting client, Meeting partenaire**
 - **Travel Cost - Coût du voyage**
 - Currency (16.2)
 - **Approver Level 1 - Approbateur - Niveau 1**
 - Lookup Relationship / User
 - **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**



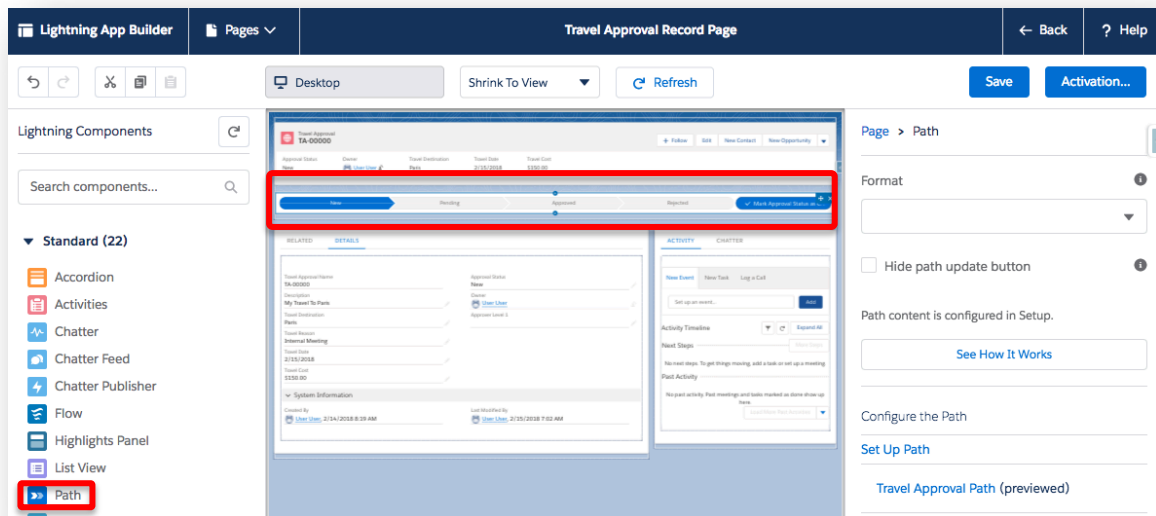
- Add « Translations »: Setup / ... / Translate
- Remark n°1: at this stage you can already create a « Travel Approval Request », collaborate around it, ...
- Remark n°2: to help you, you can use the « Step by Step » deployment tool.

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



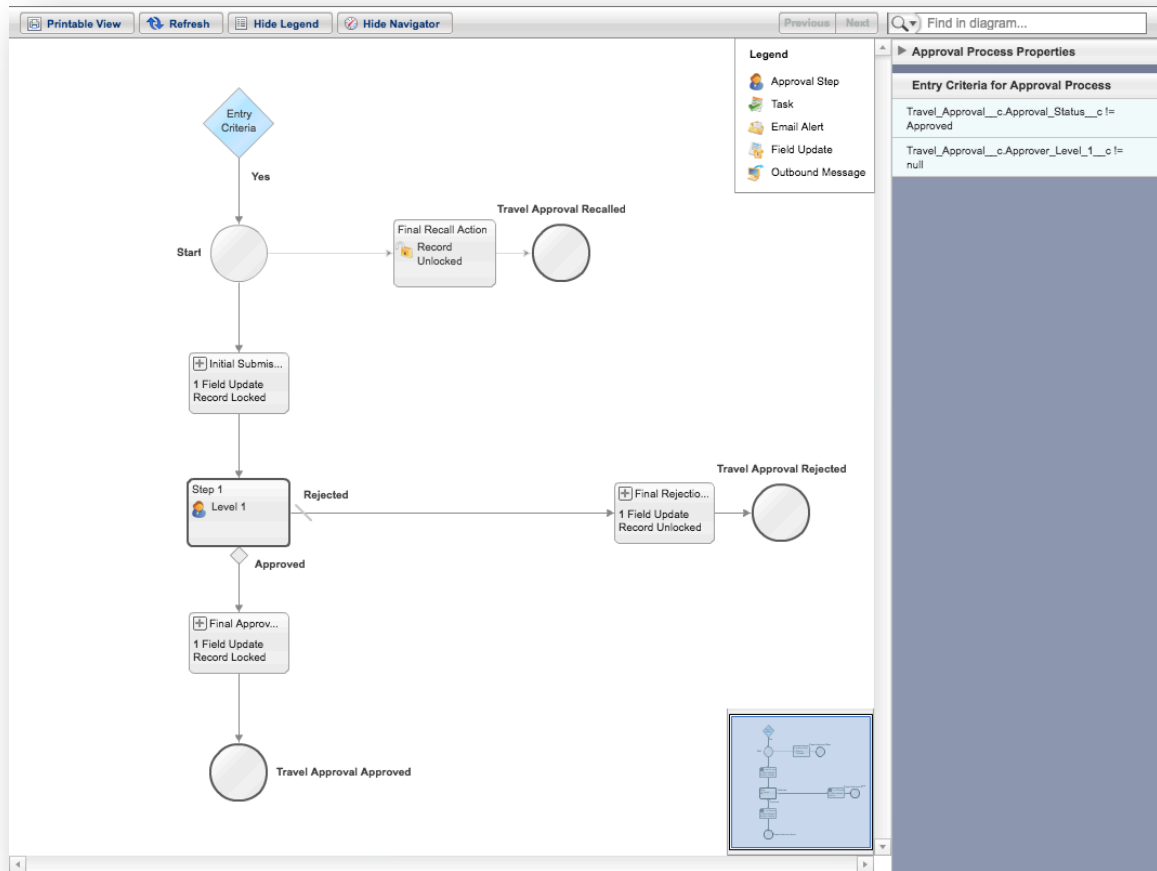
- (optional) Add a « Customer or Partner Information » section on the « Travel Approval » record page
 - Create a « Quick Action »: Setup / ... / Object Manager / Account / Buttons, Links, and Actions
 - New Action
 - Label: **Travel Approval - Customer or Partner Information**
 - Action Type: Update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

- 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.

- 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.

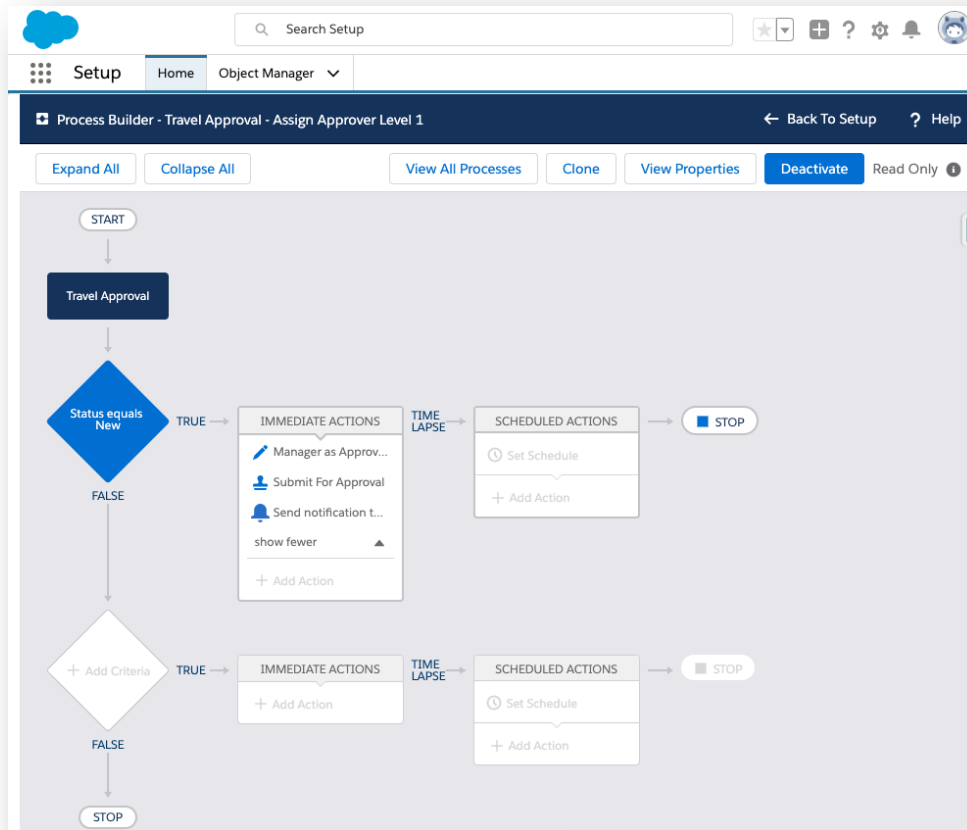
Approval Step 1:

- 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

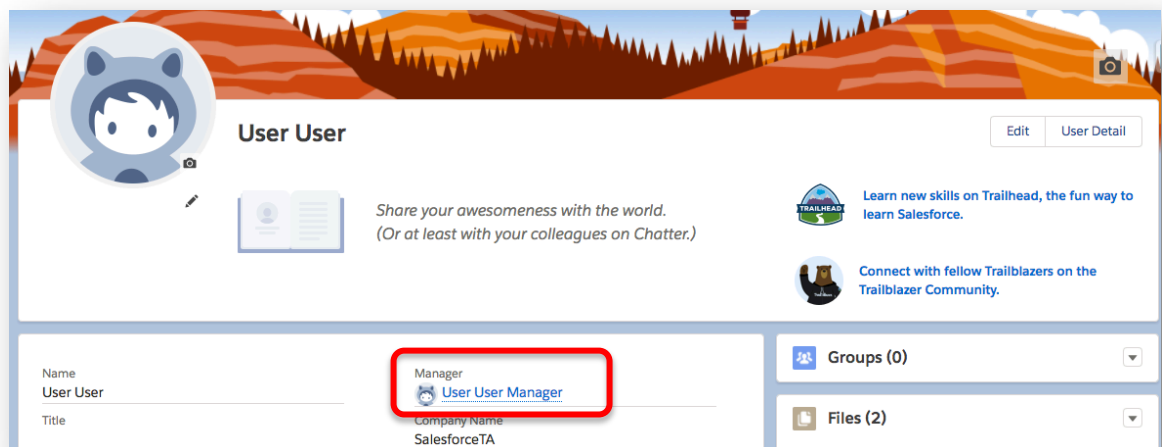


- Process Name: **Travel Approval - Assign Approver Level 1**
- The process starts when: A record changes
- Object: Travel Approval
- Start the process: only when a record is created
- Add Criteria
 - Approval Status equals New
- Immediate Action n°1
 - Action type: Update Records
 - Action name: **Manager 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

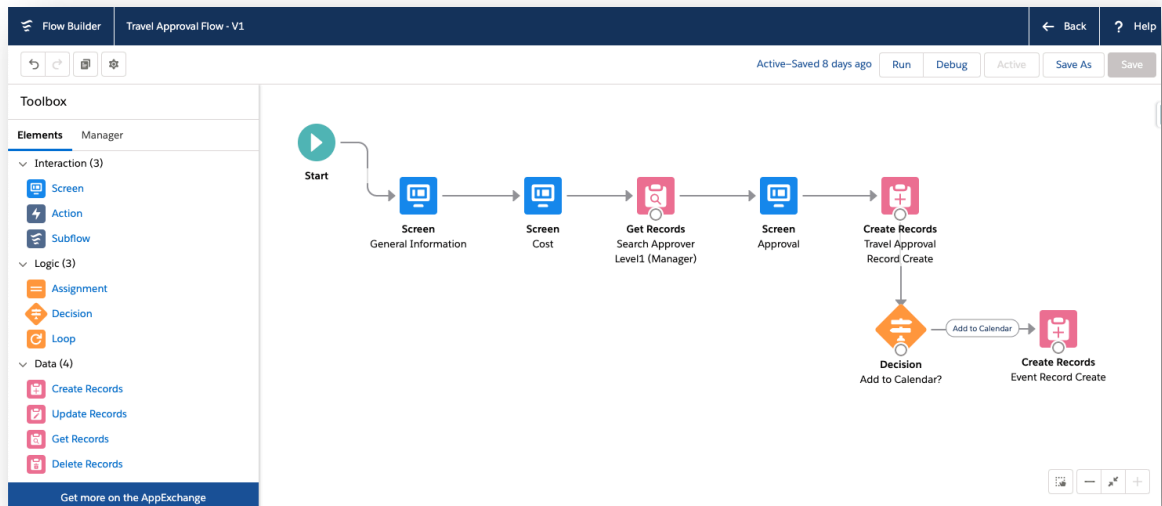


- Assign the « Manager » user as the manager of the current user:



Step 5 – VISUAL PROCESS AUTOMATION – FLOW BUILDER

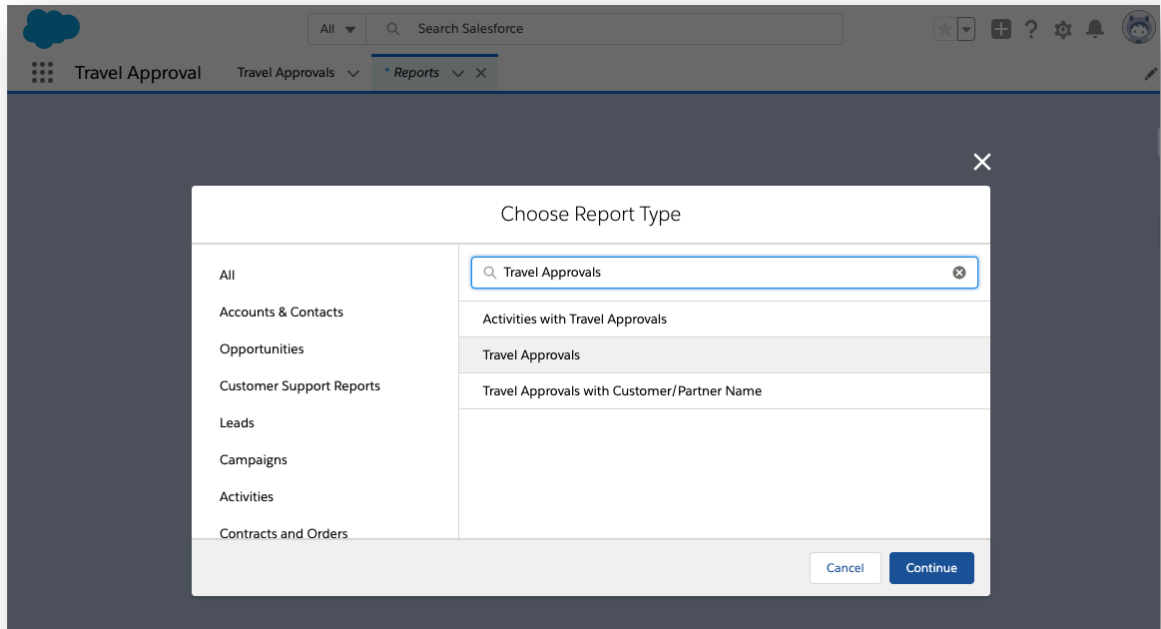
- Flow Builder: Setup / ... / Flows



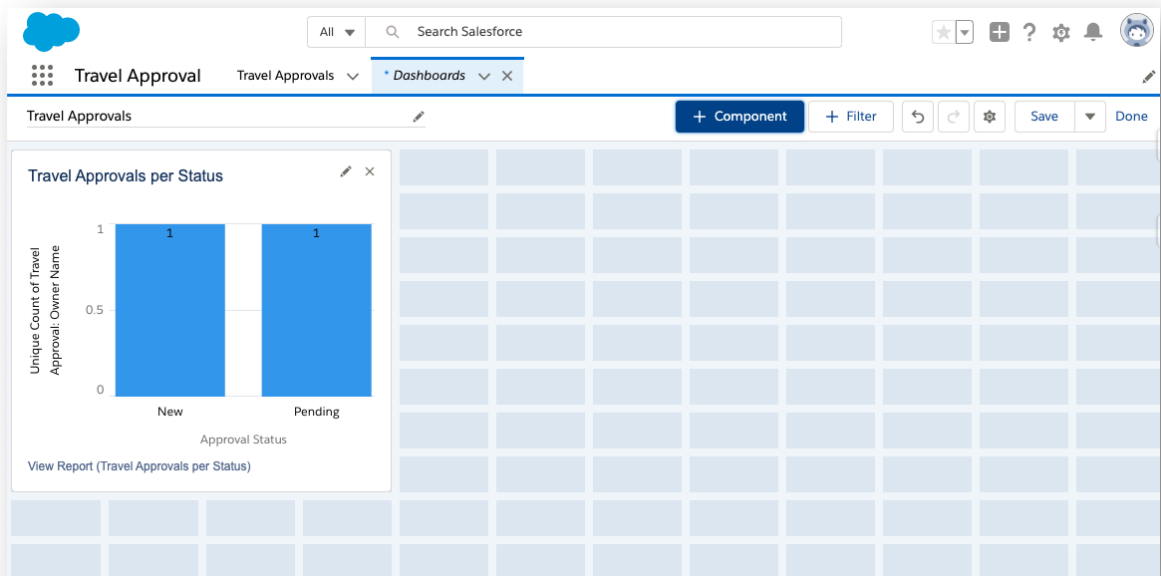
- Remark: use the « Step by Step » deployment tool.

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), Approver Level 1 (Security User), and Customer or Partner Name (test account).
- Related:** 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 showing 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.