Travel Approval App – Configuration Guide

« Step by Step » deployment tool (« workshop automator »):
https://sfdxappwizard-en.herokuapp.com/
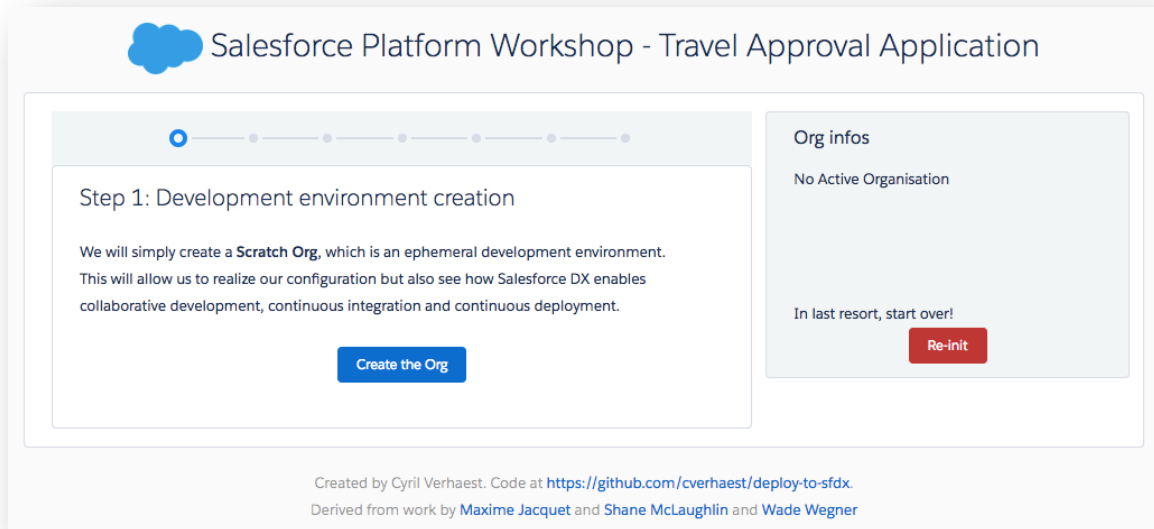
Step 1 – DEVELOPMENT ENVIRONMENT CREATION *(Scratch Org)* and prerequisites

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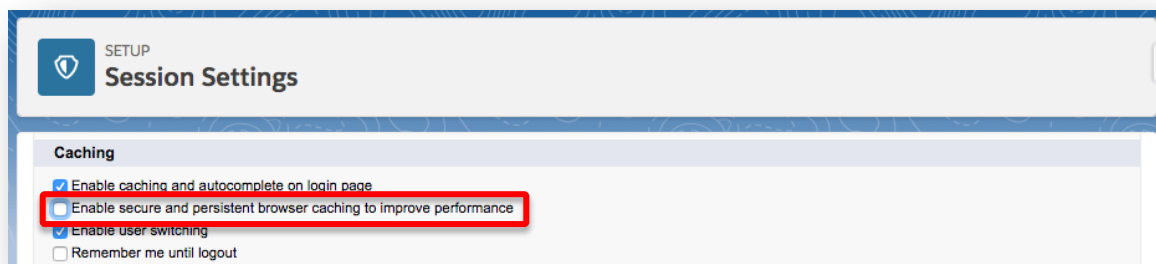
- Add languages for translations: Setup / … / Translation Language Settings
  - Add « **English** » & « **French** »

SETUP
Translation Language Settings

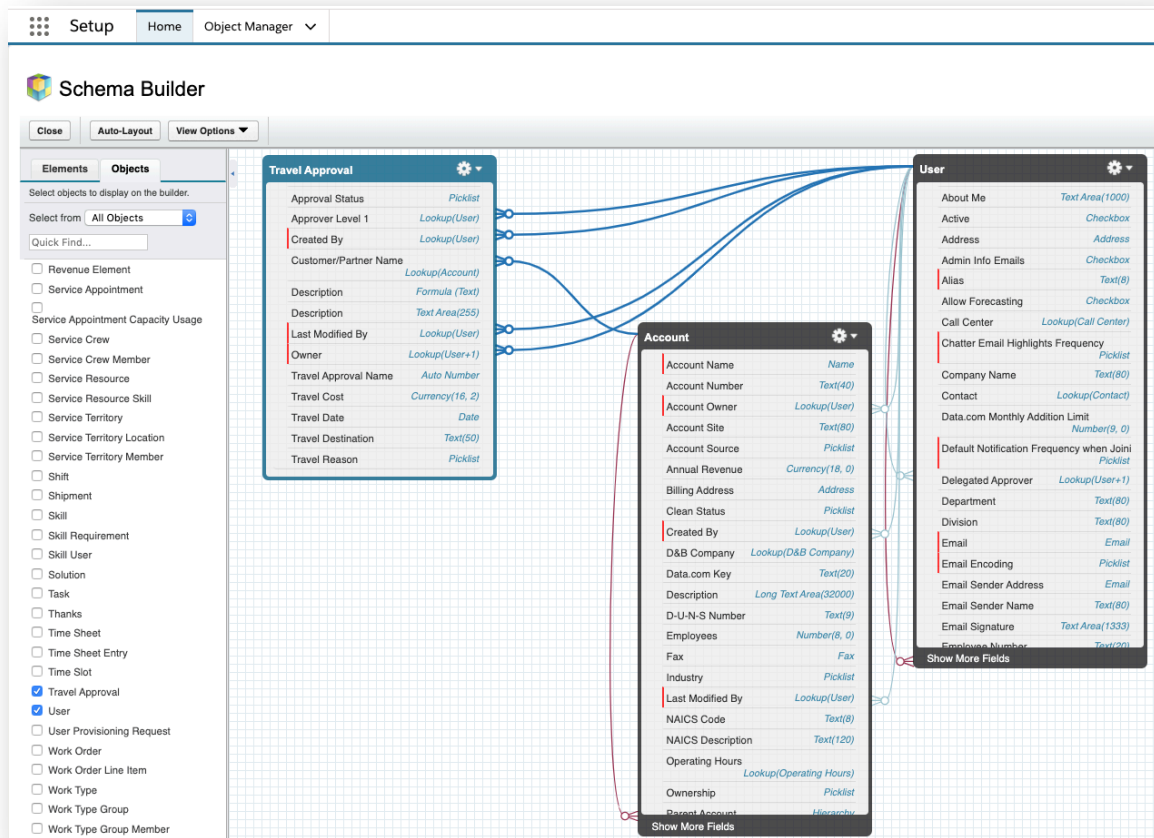## Translation Workbench

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)
Edit	English	✓	User User
Edit	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**
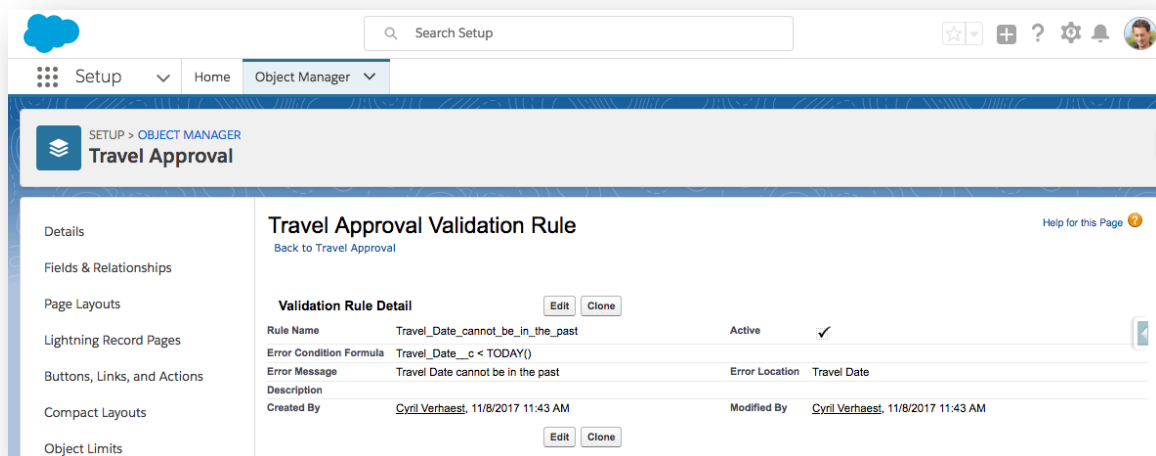
- Add « Translations »: Setup / … / Translate

- <u>Remark n°1</u>: at this stage you can already create a « Travel Approval Request », collaborate around it, …

- <u>Remark n°2</u>: 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
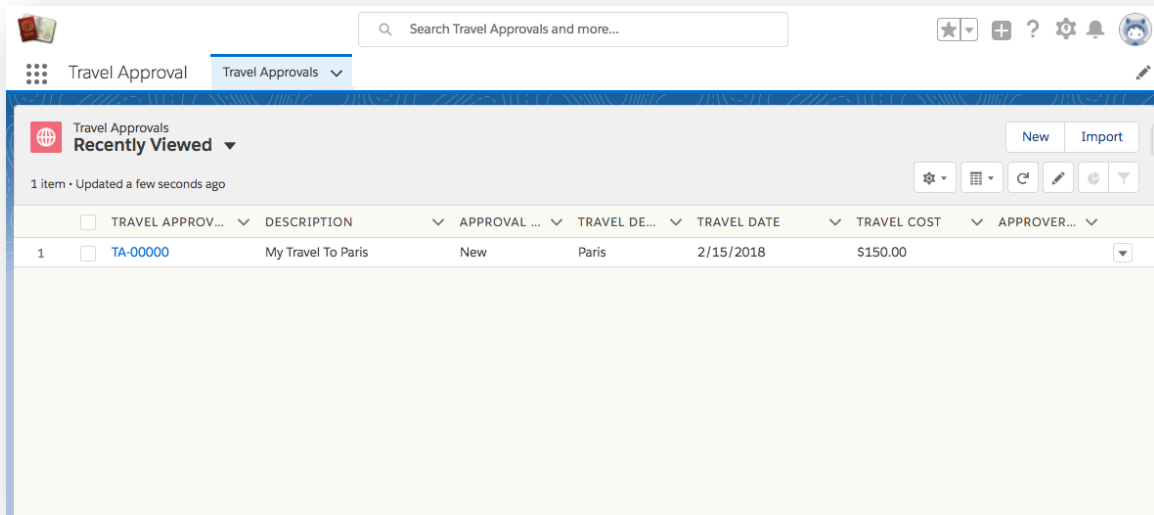
- Add the « Path Assistant » on the « Travel Approval » record page: Edit Page
  - Drag & Drop the « Path Component » to the Page
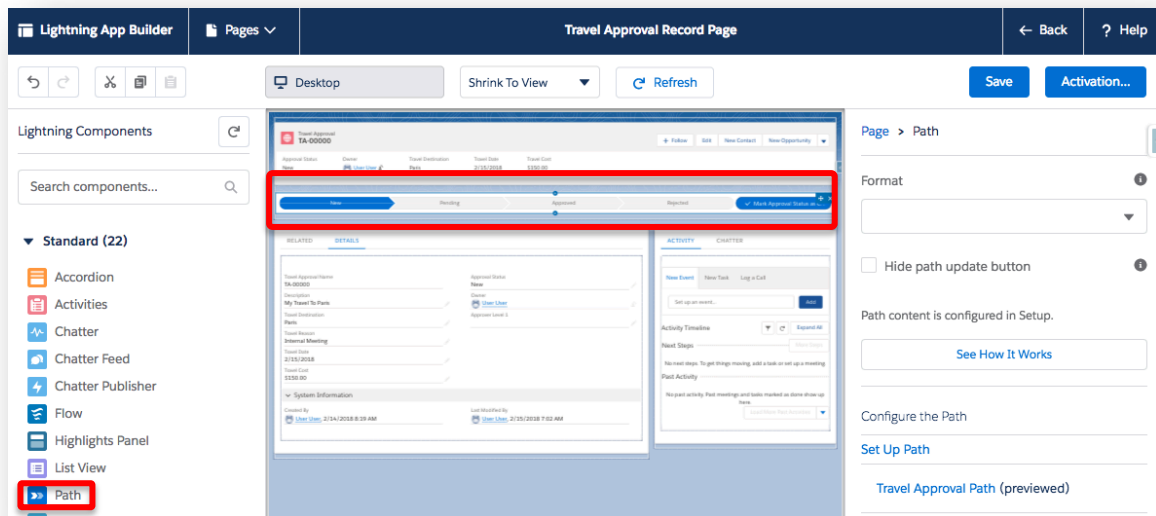
- *(optional)* Add a « Customer or Partner Information » section on the « Travel Approval » record page
  - Create a « Quick Action »: Setup / … / Object Manager / Account / Buttons, Links, and Actions
    - New Action
      - Label: **Travel Approval - Customer or Partner Information**
      - Action 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.

- <u>Remark</u>: 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
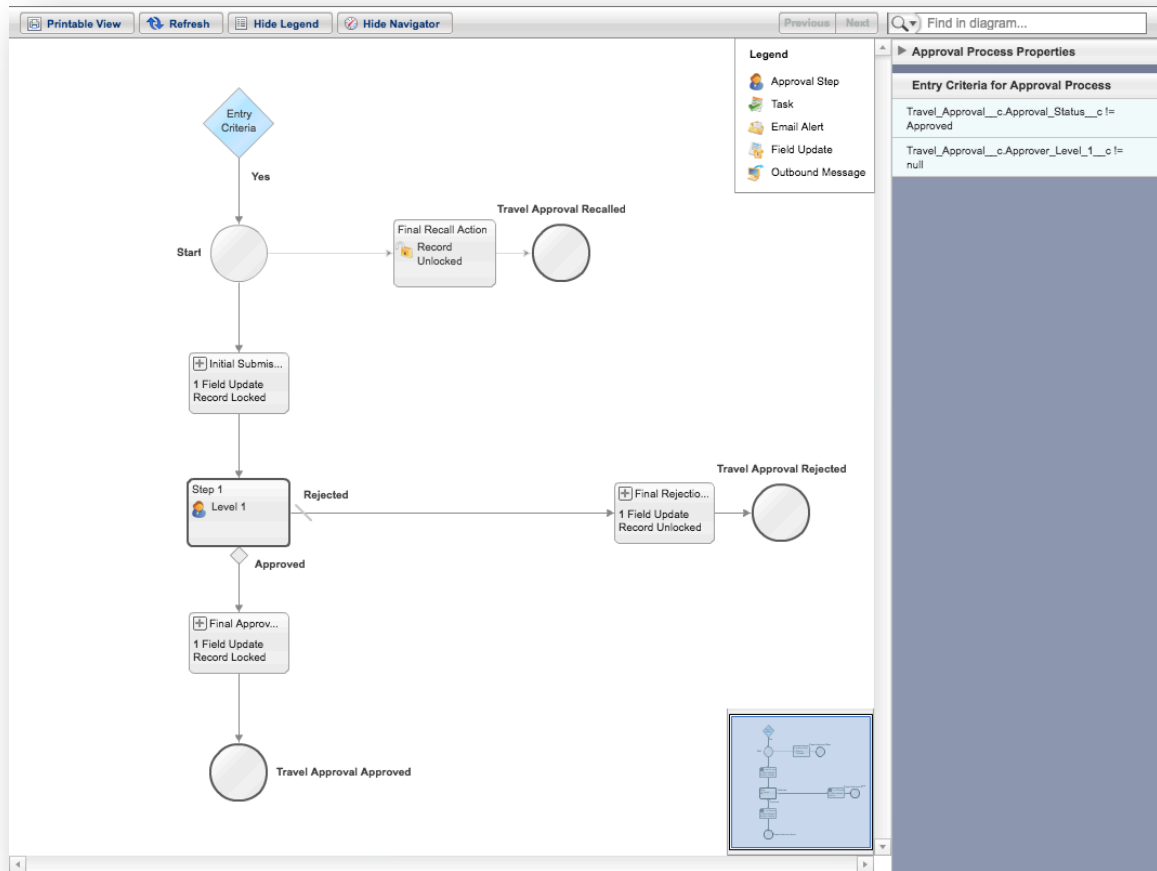
Manage Approval Processes For: Travel Approval
Create New Approval Process: Use Standard Setup Wizard

- o Step1 - Process Name: **Travel Approval - Approval Process**
- o Step 2 - Entry Criteria: "Approval Status" NOT EQUALS TO "Approved" AND "Approver Level 1" NOT EQUALS TO null
- o Step 3 - Administrators **OR** the currently assigned approver can edit records during the approval process.
- o 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)
- o Step 6 - Specify Initial Submitters: Travel Approval Owner

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

Approval Step 1:
o <u>Step 1</u> - Name: **Level 1**
o <u>Step 2</u> - All records should enter this step
o <u>Step 3</u> - 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.

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

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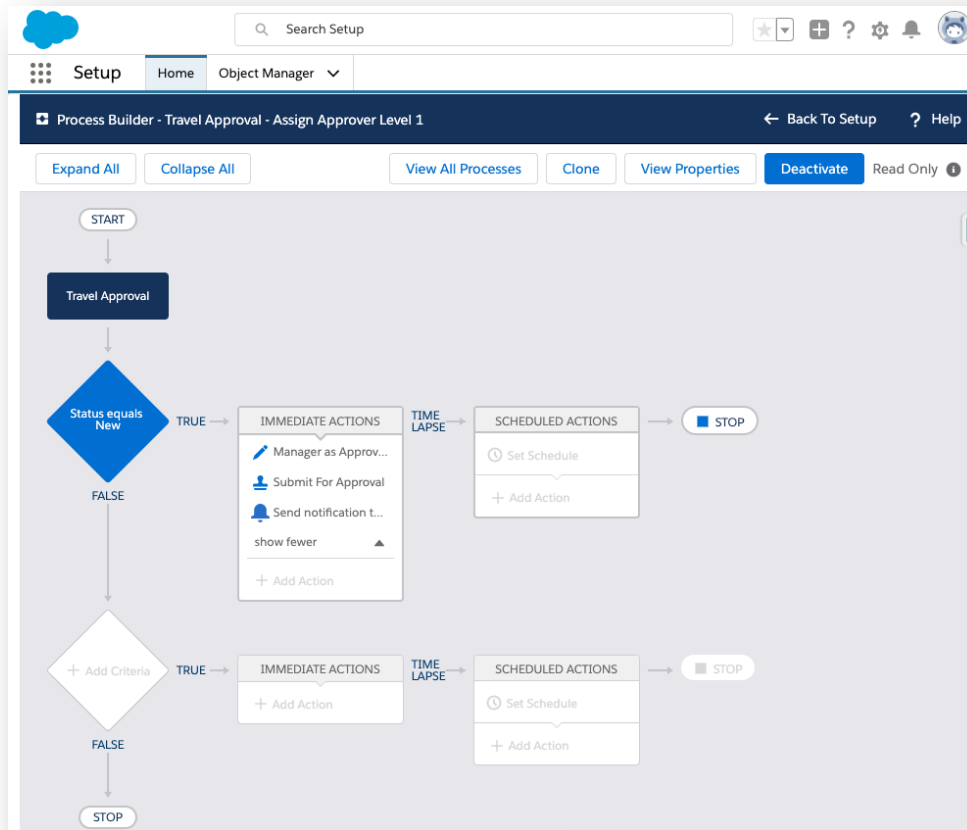

- o Process Name: **Travel Approval - Assign Approver Level 1**
- o The process starts when: A record changes
- o Object: Travel Approval
- o Start the process: only when a record is created
- o Add Criteria
    - ▪ Approval Status equals New
- o Immediate Action n°1
    - ▪ Action type: Update Records
    - ▪ 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"
- o 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"
- o *(optional) Immediate Action n°3 – Custom notification*
- o **Activate**

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

- Create a test "Manager" user: Setup / … / Users / New
  o Firstname: User
  o Lastname: Manager
  o Email: *« Votre adresse email »*
  o Username: **usermanager*XXXXX*@example.com**
  o User License: Salesforce
  o Profile: System Administrator
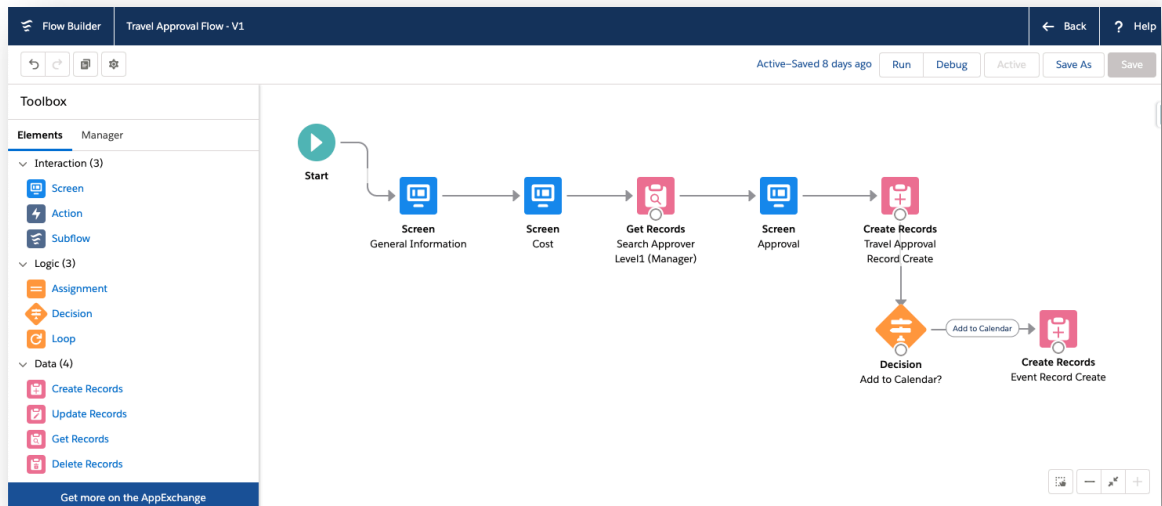 o …
  o & assign Permission Sets to him

- Assign the « Manager » user as the manager of the current user:
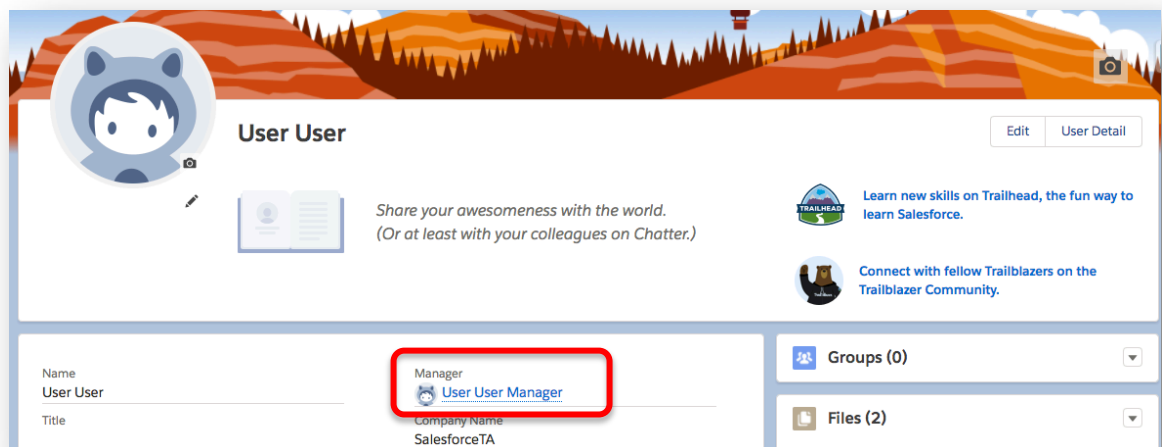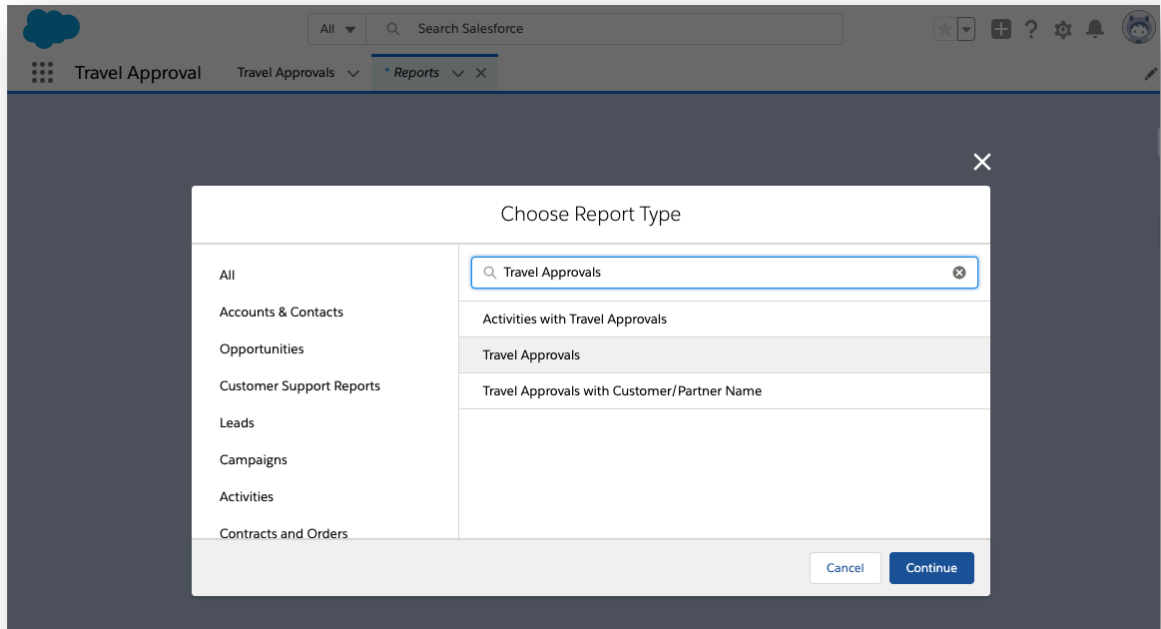
Step 5 – VISUAL PROCESS AUTOMATION – FLOW BUILDER

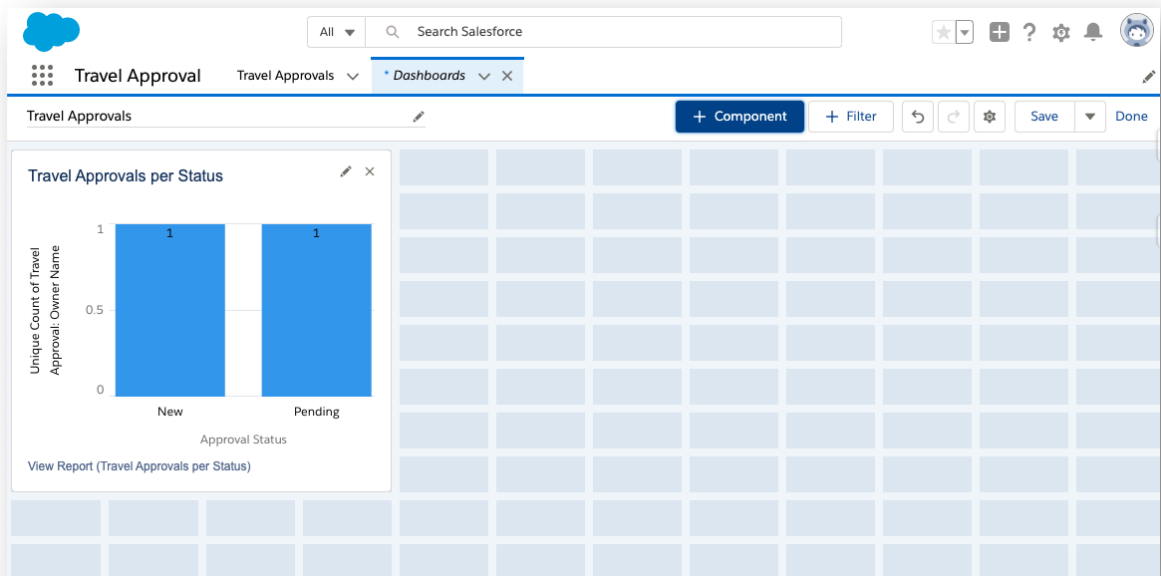- Flow Builder: Setup / … / Flows

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

Step 6 – REPORTS & DASHBOARD

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

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

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

Step 7 – DEVELOPMENT ON THE PLATFORM

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