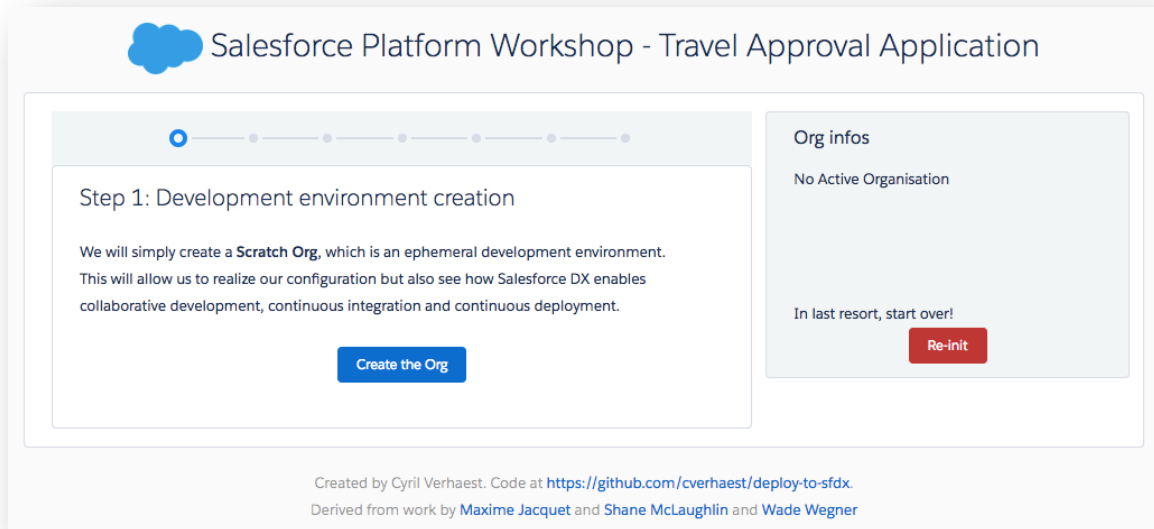


Travel Approval App – Configuration Guide

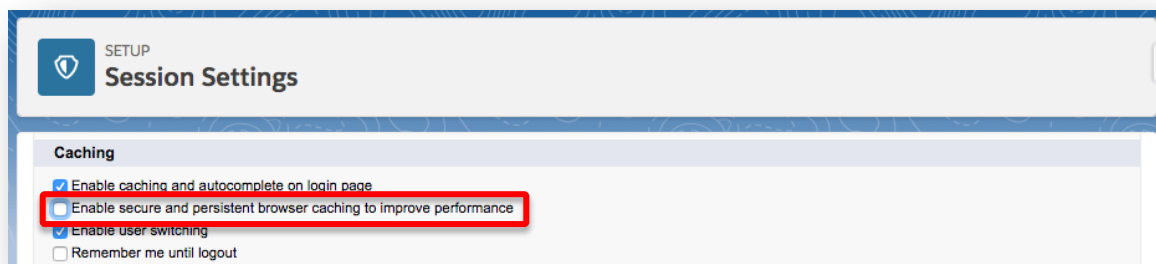
« Step by Step » deployment tool (« workshop automator »):

<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](#) ?

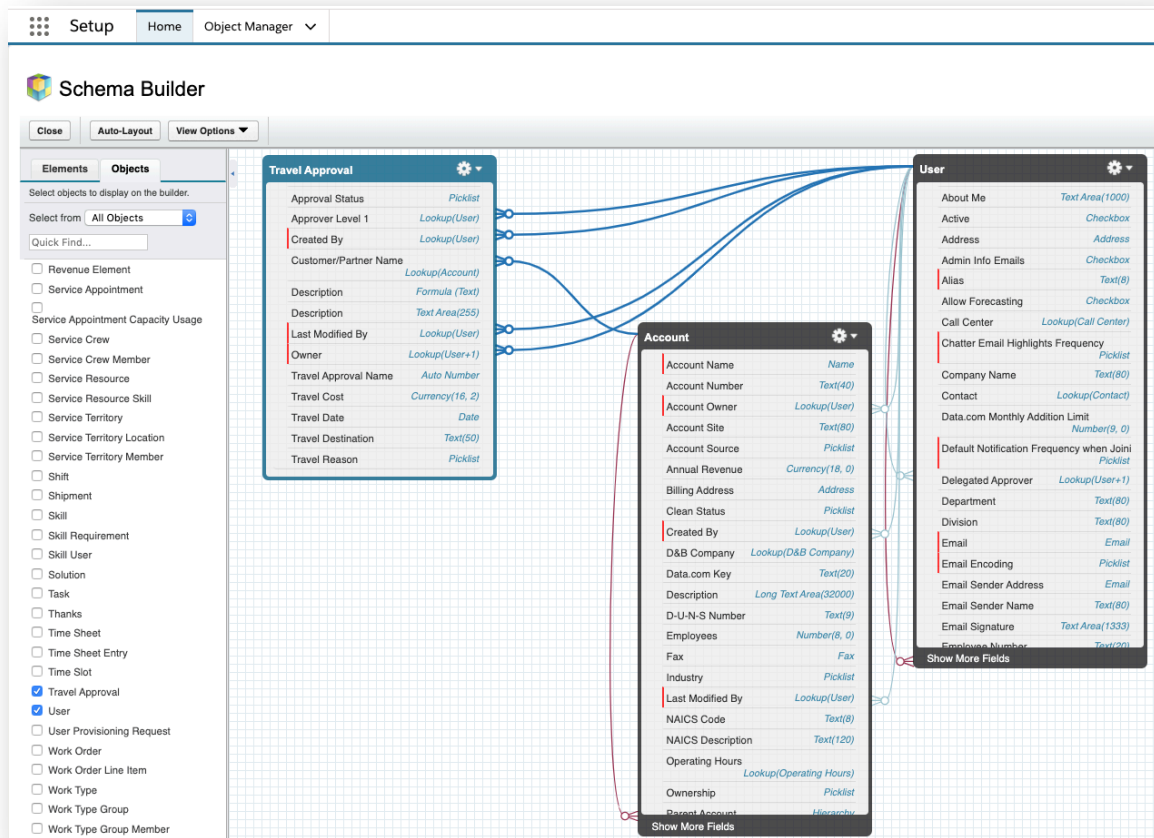
Click Add to select the languages your organization supports and the users who are responsible for translating that language.

Supported Languages

Add

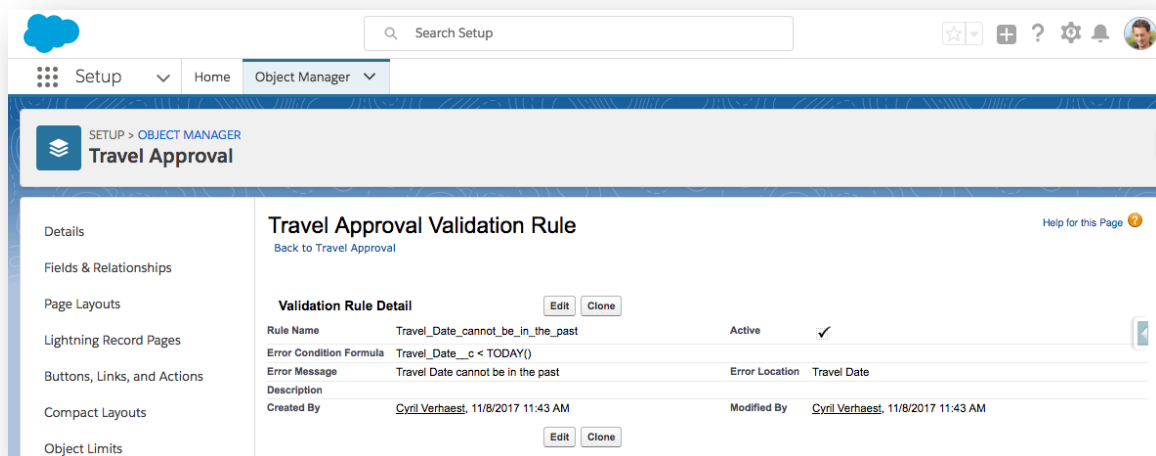
Action	Language	Active	Translator(s)
Edit	English	✓	User User
Edit	French	✓	User User

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

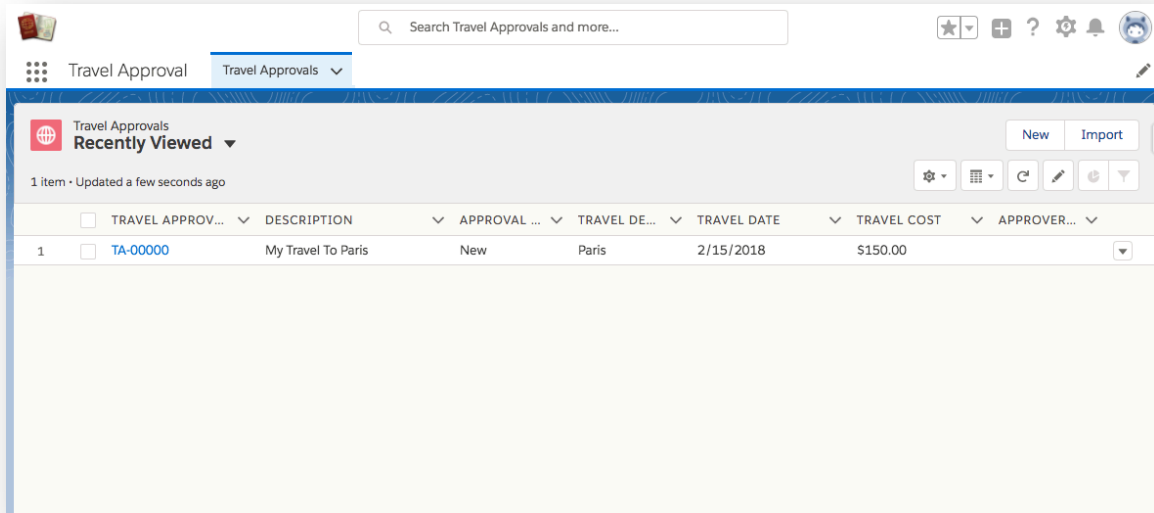
- **Travel Reason - Raison du voyage**
 - Picklit
 - **Internal Meeting, Customer Meeting, Partner Meeting - Meeting interne, Meeting client, Meeting partenaire**
 - **Travel Cost - Coût du voyage**
 - Currency (16.2)
 - **Approver Level 1 - Approbateur - Niveau 1**
 - Lookup Relationship / User
 - **Customer/Partner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



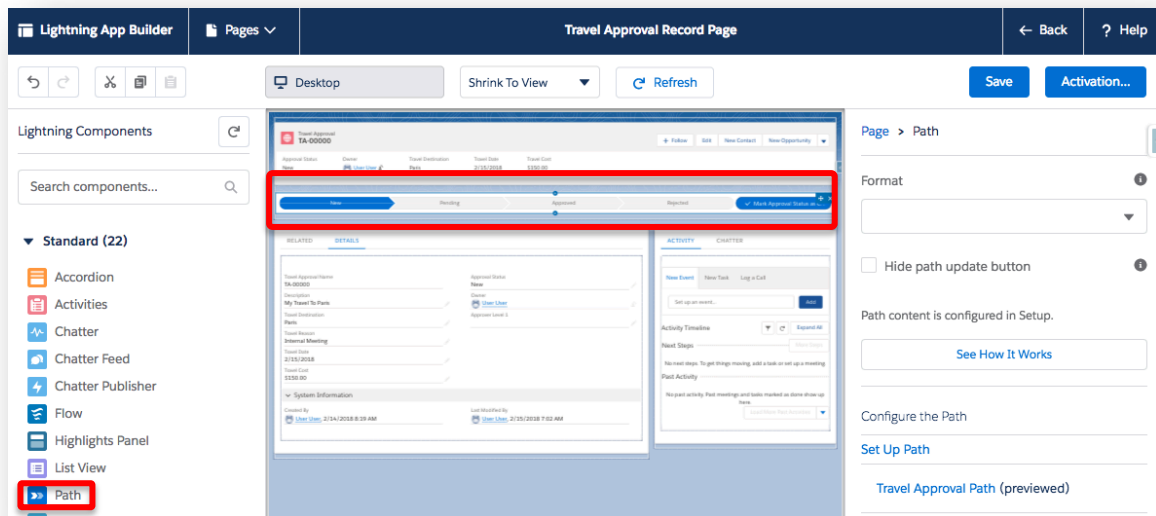
- Add « Translations »: Setup / ... / Translate
- Remark n°1: at this stage you can already create a « Travel Approval Request », collaborate around it, ...
- Remark n°2: to help you, you can use the « Step by Step » deployment tool.

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



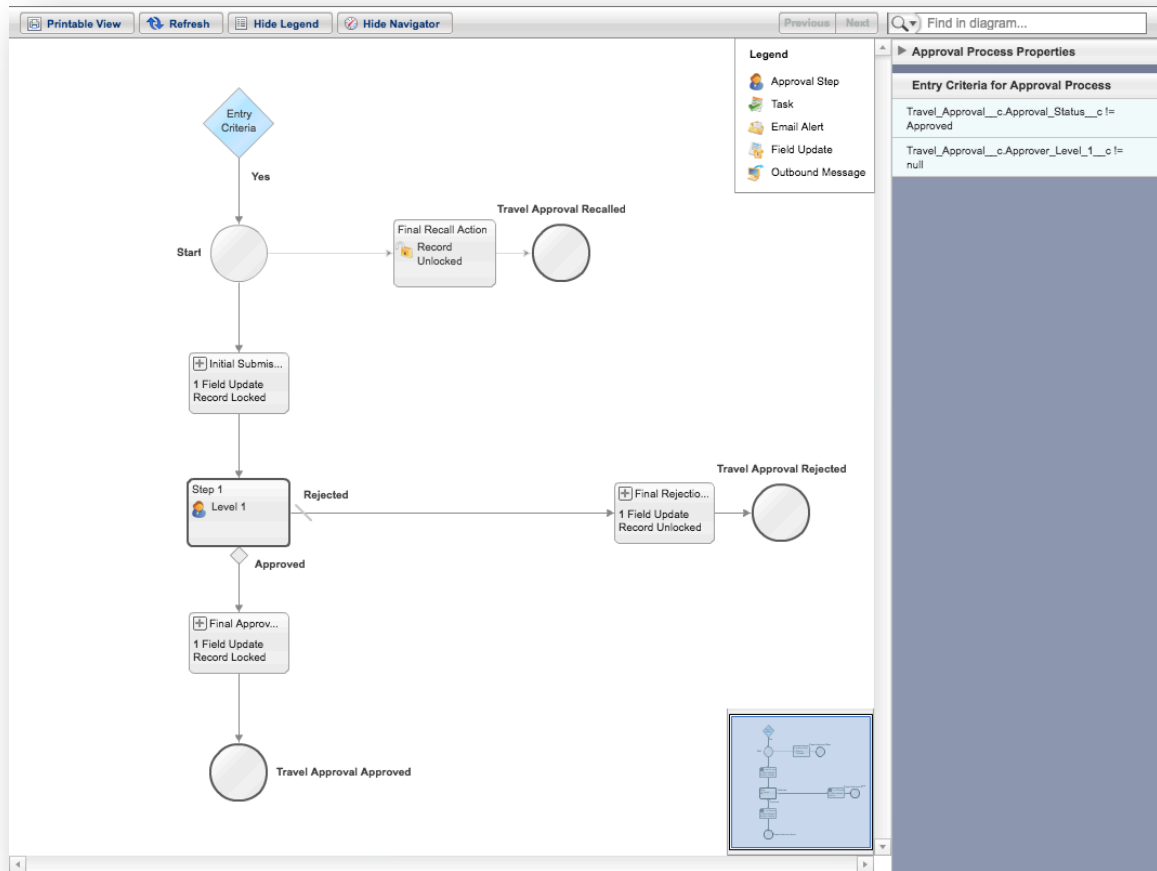
- (optional) Add a « Customer or Partner Information » section on the « Travel Approval » record page
 - Create a « Quick Action »: Setup / ... / Object Manager / Account / Buttons, Links, and Actions
 - New Action
 - Label: **Travel Approval - Customer or Partner Information**
 - Action Type: Update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

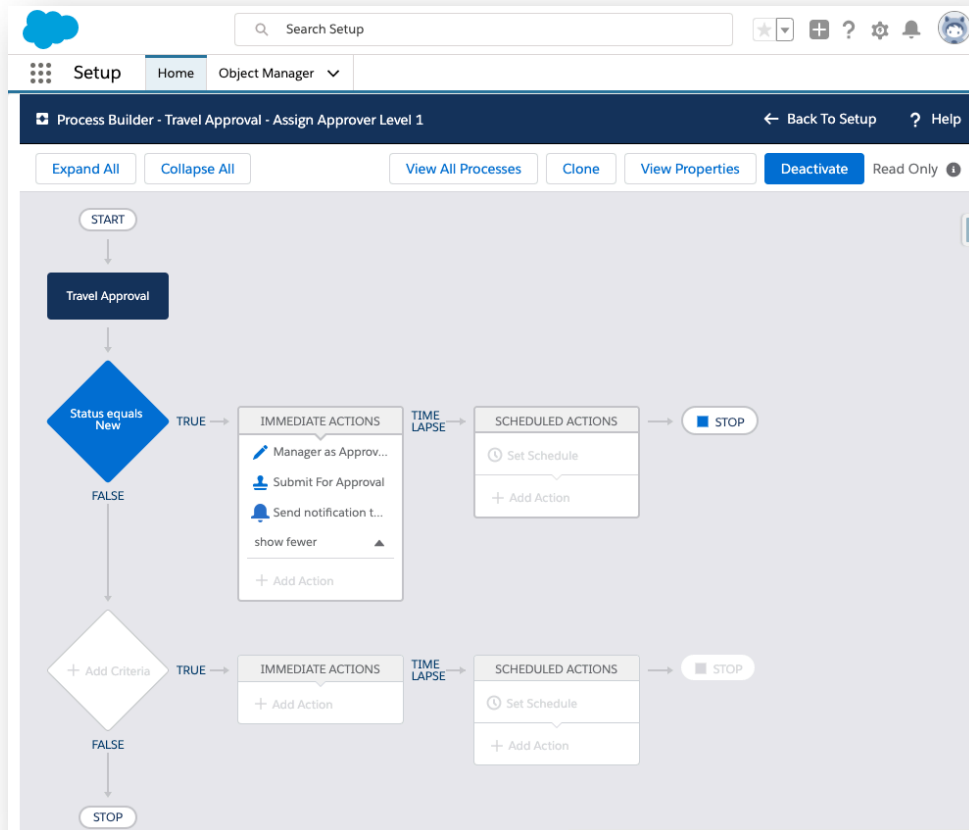
Approval Step 1:

- 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

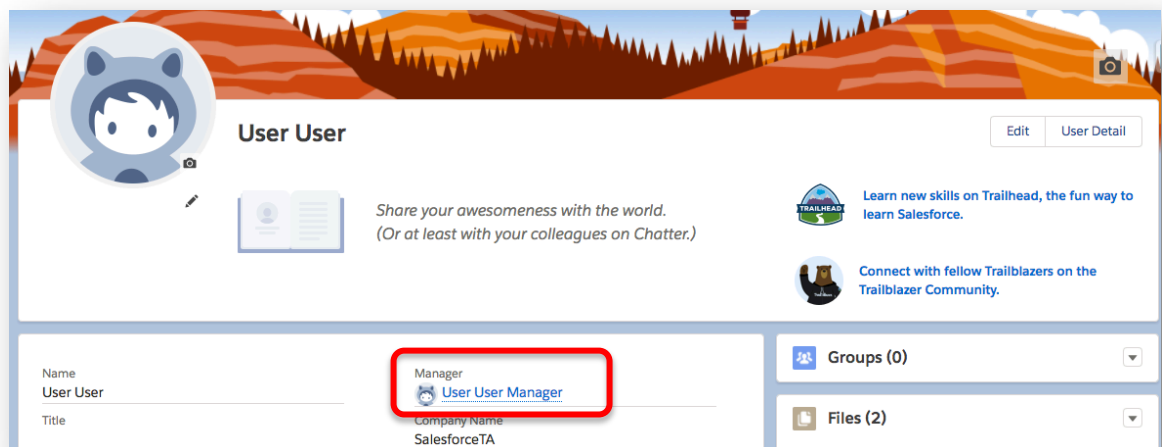


- Process Name: **Travel Approval - Assign Approver Level 1**
- The process starts when: A record changes
- Object: Travel Approval
- Start the process: only when a record is created
- Add Criteria
 - Approval Status equals New
- Immediate Action n°1
 - Action type: Update Records
 - Action name: **Manager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

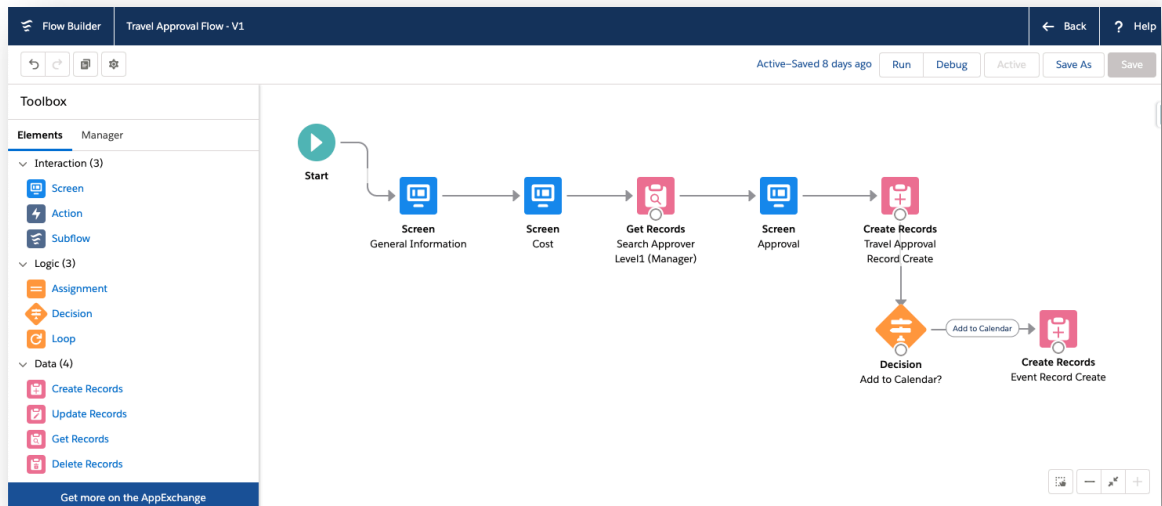


- Assign the « Manager » user as the manager of the current user:



Step 5 – VISUAL PROCESS AUTOMATION – FLOW BUILDER

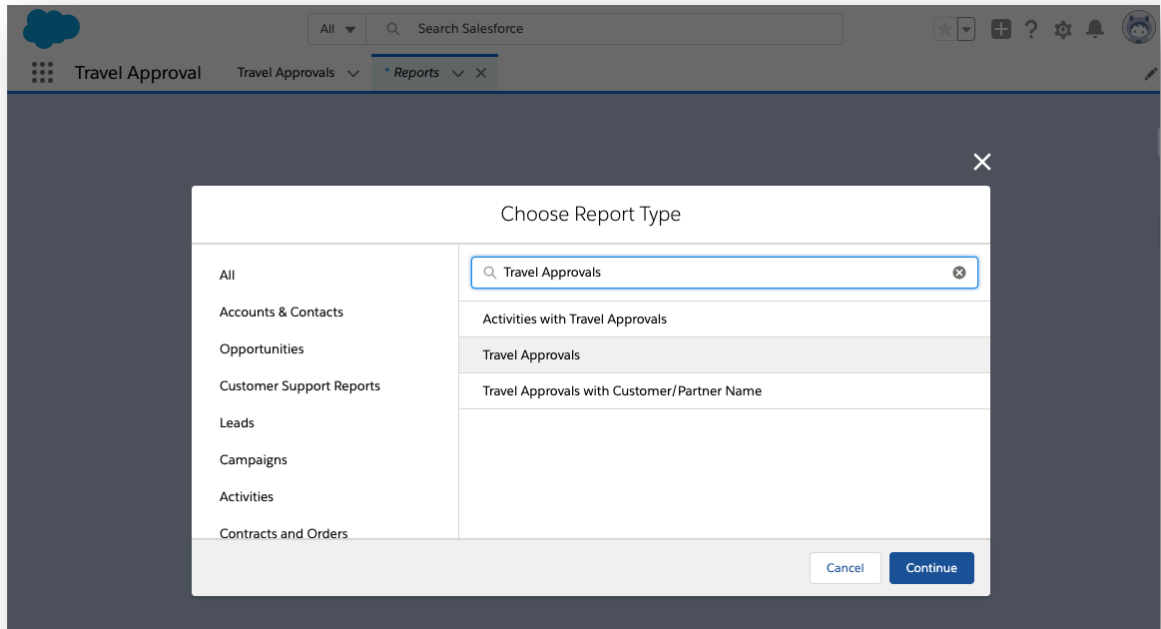
- Flow Builder: Setup / ... / Flows



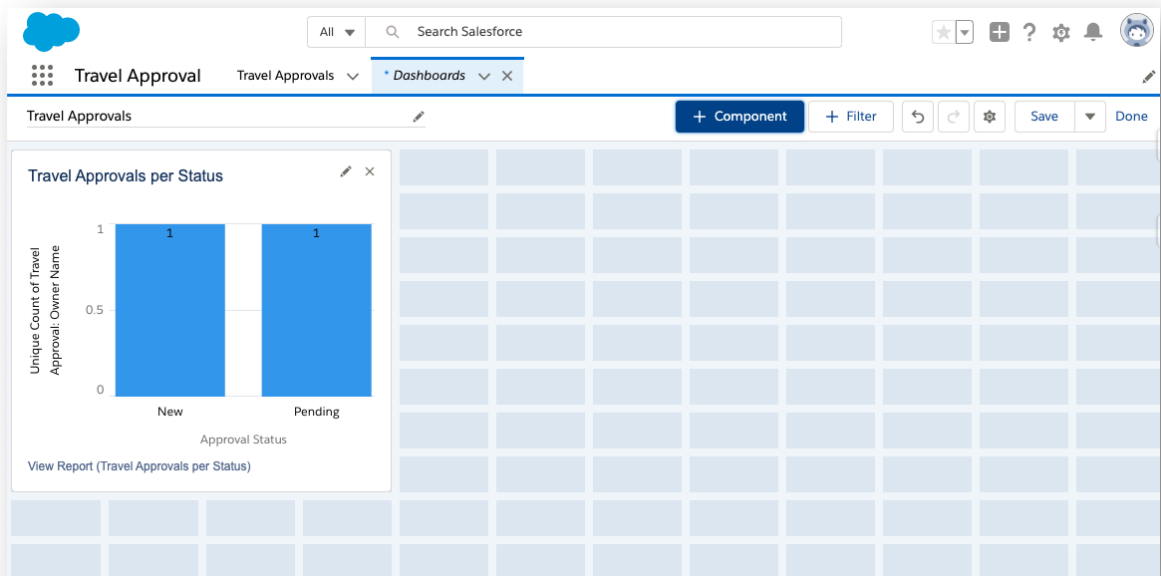
- Remark: use the « Step by Step » deployment tool.

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

Travel Approval TA-00001

Approval Status: Pending Owner: User User Travel Destination: Paris Travel Date: 7/15/2019 Travel Cost: \$150.00

Progress: Pending (Active) Approved Rejected

Mark Approval Status as Complete

Details Related

Travel Approval Name: TA-00001

Description: My Travel to Paris - Salesforce Platform Training

Travel Destination: Paris

Travel Reason: Customer Meeting

Travel Date: 7/15/2019

Approval Status: Pending

Owner: User User

Approver Level 1: Manager Manager

Expense Receipt

Upload the expense receipt

Upload Files Or drop files

DOC

My Expense Receipt

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